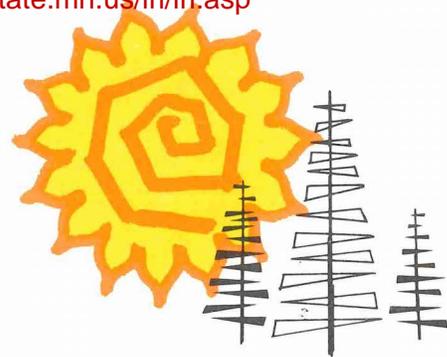


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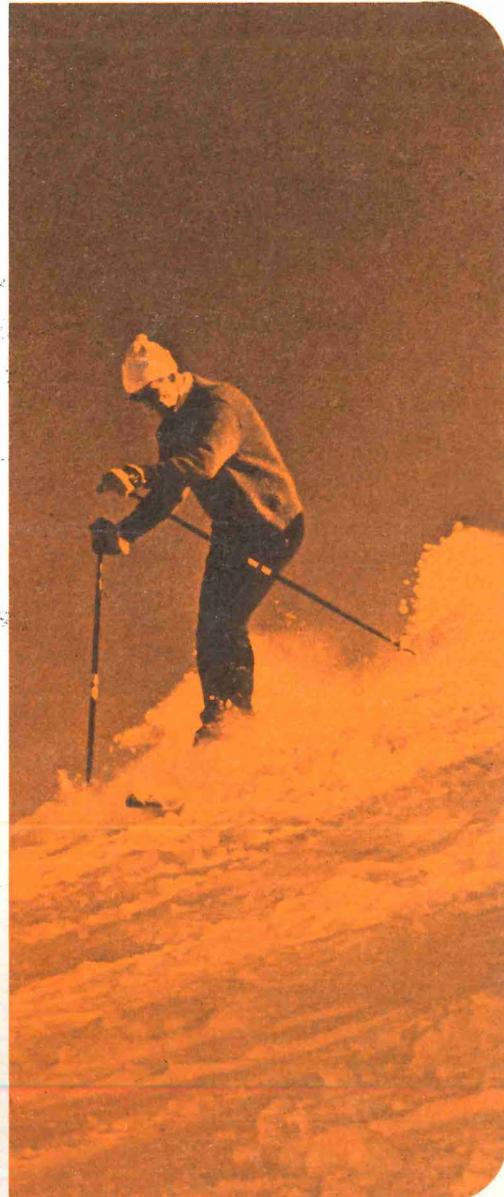
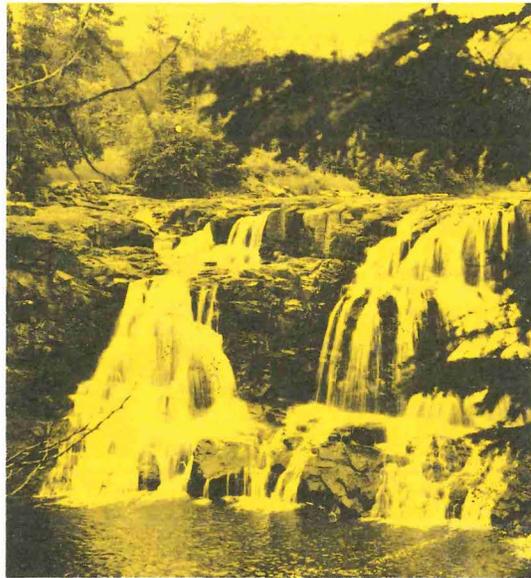
# Minnesota

## Tourism '68

### A Market Analysis

Allan L. Pennington  
Ivan Ross  
William Rudelius

1969. 160 p.



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SCHOOL OF BUSINESS ADMINISTRATION • UNIVERSITY OF MINNESOTA  
MINNESOTA STATE PLANNING AGENCY

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*Office of the Dean*

December 30, 1968

Mr. Raymond T. Olsen, Director  
State Planning Agency  
603 Capitol Square  
Saint Paul, Minnesota 55101

Dear Mr. Olsen:

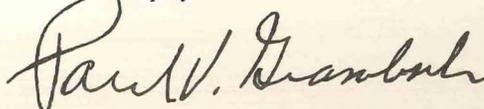
In April, 1968, the Minnesota State Planning Agency contracted with the School of Business Administration of the University of Minnesota for a study of the State's tourism and vacation industry. On behalf of the research staff, I am pleased to transmit the attached final report in accordance with the contract agreement.

Professor C. William Rudelius directed the School of Business Administration research group; Mr. John Morgan, provided liaison for your office. The positive spirit that prevailed between our respective staffs greatly facilitated the progress of the study. We are deeply appreciative for this cooperative relationship.

Although the School of Business Administration does not have the resources to undertake continuing studies of the State's many industries, our aim is to collaborate to the fullest extent possible with State agencies in support of the public interest. To this end, we are pleased to make personnel and facilities available for specific projects. This is the case with the present Minnesota tourism project. We believe the information provided in the report will enable Minnesota to expand its multi-million dollar tourism and vacation industry.

I hope that we may continue to work together in the future for the State of Minnesota.

Sincerely yours,



Paul V. Grambsch  
Dean

PVG/kw

Enclosure

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STATE OF MINNESOTA

MINNESOTA TOURISM '68: A MARKET ANALYSIS

by

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of the

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University of Minnesota  
Minneapolis, Minnesota 55455

Minnesota State Planning Agency  
St. Paul, Minnesota

January, 1969

### ACKNOWLEDGEMENTS

Completion of the present study required the assistance of many individuals and organizations throughout the State of Minnesota. Particular recognition should be given to the Minnesota Resources Commission for providing the funds to conduct the study and to the State Planning Agency and Department of Economic Development for assisting in the planning and execution of the study. The research group is also indebted to the tourism personnel at Chambers of Commerce and Tourist Information Centers throughout Minnesota's six vacation regions for the valuable insights they provided and to The Erle Savage Company for making advertising data available. Finally, appreciation is extended to departments throughout the University of Minnesota for providing facilities and personnel to aid in analyzing and presenting the data.

The preparation of this publication was financially aided through a Federal grant from the Department of Housing and Urban Development, under the Urban Planning Assistance Program authorized by Section 701 of the Housing Act of 1954, as amended.

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## 1. SUMMARY

The principal purpose of the study was to seek answers to two general questions:

- How can Minnesota promote its recreational product more effectively in order to attract more vacationers?
- How can Minnesota improve its recreational product--that is, its tourist offerings--to attract more vacationers?

It was agreed that the present study should seek information that would suggest specific actions Minnesota can take to attract more tourists.

### Approach

A variety of information sources provided the basis for the study. They may be divided into three broad classes: (1) review of prior conferences, studies, and reports; (2) interviews with knowledgeable people in Minnesota's tourism industry; and (3) formal surveys using mail, telephone, and personal interviews. Examples of items falling in the first category are resolutions passed at the Governor's Conference on Tourism held in 1967 and pertinent prior studies of tourism in vacation regions of Minnesota, in the State as a whole, and in other Midwestern states competing for tourist dollars. Interviews were held with representatives of the State Planning Agency and the Department of Economic Development, as well as with personnel in Chambers of Commerce and Tourist Information Centers throughout Minnesota's six vacation regions. Finally, information was obtained by mail questionnaires from vacationers who do come to Minnesota, vacationers who do not, and

potential vacationers who mailed in coupons from the State's magazine advertisements to request information. In addition, telephone and personal interviews were held with Twin Citians--a primary market for the State's tourism industry.

### Recommendations

#### Improving Advertising and Promotion

Recommendations for improving Minnesota's advertising and promotion include the following:

1. To expand the State's tourist and travel industry, Minnesota should increase its promotional budget.
2. Future advertising campaigns should be pretested for communication effectiveness before being submitted to the mass media.
3. The basic appeals stressed in individual advertisements should be fishing, water activities, and scenery. The State should develop and promote meaningful sightseeing attractions to a greater extent. The State should also add to its initial literature sent to coupon mailers a listing of these attractions, including the dates of local fairs, festivals, and so on.
4. Minnesota should continue the concentration of advertising efforts in the Midwestern market, excluding Ohio. The Ohio market is too far east and too close to the vacation areas of Michigan, New York, and Pennsylvania to warrant the purchase of regional magazine advertising.

5. Advertising media and appeals should be directed at tourists with the following characteristics:
  - a. The younger age group (under 40), which the study shows to be the age group most likely to be future Minnesota vacationers.
  - b. The higher income vacationers, since they take more vacations per year and spend more money per vacation than lower income vacationers.
  - c. The craftsman-foreman occupational group, since it is the largest vacationing occupational group, and the professional, technical, and managerial groups, since a larger proportion of them vacation.
  - d. The transit group of vacationers who are simply driving through Minnesota on the way to another state.
6. In future advertising campaigns, the State should use a promotion schedule which covers the months of February through June.
7. The State should use newspaper ads or radio or television spot advertisements in major cities in or near Minnesota to attract the tourists whose summer vacation decisions are being made in July or August.
8. Minnesota should increase advertising in magazines with a larger proportion of male readership, because husbands are more influential in making vacation decisions than previously thought.
9. Increasing the number of coupon returns should become a primary objective of the State's promotional campaign. The State should

use advertising cost per coupon return as an important criterion in evaluating the media schedule.

10. The Minnesota Department of Economic Development and related regional agencies should reduce the number of steps a prospective tourist who sees a magazine advertisement on Minnesota vacations must take to obtain information and reservations.
11. The State should consider mailing copies of current Minnesota fishing regulations and a simplified accommodations checklist to those who bought a fishing license the previous year. The same could be done for hunting licenses.

#### Product Improvements

To improve the vacation product the State offers its tourists, Minnesota should take the following steps:

1. The State should investigate the adequacy of State-operated campgrounds and encourage private campground owners to do likewise.
2. Minnesota (1) should establish additional waysides throughout the State and (2) should improve existing ones by adding restrooms and picnic tables.
3. The State should provide tourist information booths on heavily traveled highways. Also, it should encourage tourist-oriented communities to do the same. Where feasible, the State's tourist information booths should be located at waysides on major vacation routes to provide the vacationer with easier access to information.

Future Research

Extensive studies of Minnesota's vacation industry should be undertaken only every five or ten years. However, smaller studies involving survey research and simple field experiments aimed at answering specific questions should be undertaken as needed.

Overview of Report

Many readers will not be interested in the research methods used or detailed statistical data. It is suggested that these people read only the "Conclusions" at the end of Sections 4, 5, 6, and 7 and then read Section 8, which provides the recommendations and a brief rationale for them.

## 2. INTRODUCTION

Tourism in Minnesota is big business. The industry is particularly important outside the seven-county Twin Cities Metropolitan Planning Area because a significant fraction of employment in this outstate region is related to tourism. Thus, the State of Minnesota is interested in stimulating vacationing and tourism in the area to provide increased employment and income for Minnesotans living there, as well as to provide recreational opportunities for people both inside and outside Minnesota.

### Objectives of Study

Recognizing the importance of increasing tourist-related employment and income in Minnesota, the State Planning Agency contracted for the present study with the School of Business Administration of the University of Minnesota in April, 1968. The State Planning Agency, the Minnesota Department of Economic Development, and the School of Business Administration agreed that the principal purpose of the study was to seek answers to two general questions:

- How can the State promote its recreational product more effectively, in order to attract more vacationers?
- How can the State improve its recreational product--that is, its tourist offerings--to attract more vacationers?

Recent tourist studies by states in the Upper Midwest have devoted

much research effort to obtaining information that is interesting but that has suggested few concrete actions that could be taken by the states. It was agreed that the present study should seek information that would suggest specific actions that can be taken by the State of Minnesota to attract more tourists.

To answer the first question posed above, information was sought which would aid the State in making advertising and promotional decisions. Examples of the questions asked to obtain this information are given below, along with the effects that certain answers might have on promotional decisions.

- What are the demographic characteristics of Minnesota vacationers? Answers should help decide in which geographic areas advertising should be placed and to which age groups appeals should be made.
- Who makes the vacation decision? Is the husband or wife more important in the decision to vacation in Minnesota? Advertising should be directed to the family member most important in the vacation decision.
- Is informational material provided by the State satisfactory in assisting potential vacationers in making vacation decisions? If not, can the State devise new ways for the potential tourist to request information, such as by improved checklists on vacation areas and offerings?

Answers to these and other questions have been obtained from people who actually vacation in Minnesota. Families who have never--or who have

ceased--vacationing in Minnesota can provide information valuable to the State, particularly in its efforts to improve its product offering. Examples of questions asked to obtain information in the "product" area are:

- In what ways are the vacation offerings of competing states superior to those of Minnesota? Answers will suggest actions to emulate or surpass successful steps taken by the competition.
- Are access facilities--wayside areas, campgrounds, and highways--adequate? If not, should the State consider upgrading them?

Meaningful answers to such questions imply tangible actions that the State can take--with the assistance of the private sector of the tourist industry --to attract more vacationers to Minnesota.

#### Outline of Report

Section 3 describes the method of approach used in conducting the study. This includes a listing of actions the State might take to generate a greater volume of tourism, and a description of the objectives and methods of collecting data from the principal sources of information used in the study. Tourist flows in the twelve-state Midwestern Region and the activities and demographic characteristics of these tourists are discussed in Section 4. The process by which vacation decisions are made, which has important implications for promotional decisions, is described in Section 5. The image of Minnesota as a vacationland among both visitors and non-visitors to the State, a pertinent factor in the State's product-improvement actions, is examined in Section 6. Section 7 analyzes the effectiveness of Minnesota's

advertising and promotional programs. The final section of this report provides detailed recommendations in the two areas mentioned above: promotion and product improvement. In addition, suggestions are made for future research the State should undertake.

### 3. METHOD OF APPROACH

The Governor's Conference on Tourism held at St. Cloud in October, 1967, set one billion dollars per year as a goal for the Minnesota travel industry. To meet this goal, the State must have subgoals for its tourism industry, must identify existing problems, and must take action to overcome these problems. The identification of problem areas requires interviews with many people--such as operators of tourist facilities, representatives of tourist organizations and Chambers of Commerce, vacationers who do and vacationers who do not come to Minnesota; all of these people have unique information to contribute.

The present section reviews first the subgoals for the State's tourism industry and possible State actions suggested by interviews of knowledgeable groups and individuals. The principal surveys used in the study are discussed, as are the potential limitations of information from these sources.

#### Identifying Actions to Increase Minnesota Tourism

##### Assembling Background Information

Two main sources of information were used to develop and refine ideas about tourism goals, problems, and actions for the State of Minnesota. The first source was pertinent studies of tourism and outdoor recreation in vacation regions of Minnesota, in the State as a whole, and in other Midwestern states competing for tourist dollars. Besides being a source of

ideas for goals, problems, and actions, these studies described research methods used in the past and their limitations and omissions. Many of these studies are included in the list of references shown in the Appendix.

The second source of background information was a sample of knowledgeable individuals from tourist-related organizations within Minnesota and a sample of actual tourists. Meetings were held with representatives of the Department of Economic Development and the State Planning Agency of the State of Minnesota. These meetings sought two kinds of information in particular: (1) State actions that were contemplated to aid in solving current problems in the tourism industry, and (2) new vacation concepts that the State might be interested in promoting. Tourists' reactions to suggestions in these two areas were tested subsequently in interviews. Interviews were conducted also with administrative personnel of at least two vacation bureaus or Chambers of Commerce from each of Minnesota's six tourist regions. These interviews highlighted both the similarities and the differences among the regions in developing their regional tourist industry. Finally, tourists were interviewed in June and July to discover what problems they might have encountered in planning and taking their Minnesota vacations which the State might assist them in solving.

#### Goals for Tourism and Outdoor Recreation

An industry of one billion dollars per year has been established as the principal current goal for the State's tourist and travel business. Achieving this goal requires (1) the present number of vacationers, spending

more money in Minnesota, (2) additional vacationers, spending at the same rate as past vacationers, or (3) an increase in the total number of Minnesota vacationers, each spending at a higher rate. The third alternative is the most desirable.

This report focuses on tourism in Minnesota's five nonmetropolitan tourist regions. Although each of these five regions can increase tourist spending in its own region by appealing to local residents and visitors in the other four, tourist dollars come primarily from two other geographic areas: (1) the Minneapolis-St. Paul Metropolitan Area and (2) out-of-state residents. Hence, this report concentrates on these two groups.

Tourism goals vary appreciably among the State's six tourist regions. The three northern regions (Vikingland, Heartland, and Arrowhead) emphasize the destination-area approach to vacations--they offer natural and man-made scenery (forests, lakes, open-pit mines) and activities (fishing, water sports, skiing) that attract people from some distance to "come and spend a few days or several weeks." Although there are some exceptions, Minnesota's two southern regions (Pioneerland and Hiawathaland) emphasize scenic drives through these regions--on the way to somewhere else--in the reasonable hope of attracting visitors for a temporary stop for food or gasoline or an overnight stop for lodging. The appeal of the Minneapolis-St. Paul Metropolitan tourist region to the individual or family is a combination of the "destination area" and "drive-through" appeals mentioned above. For many, the metropolitan area is a convenient place to spend a few hours or a day while on the way to another destination--Mom and the girls can shop in one of the two downtown areas or in

a shopping center while Dad and the boys go to the ball game. For other families, the metropolitan area is a destination area in which they spend several days or a week. Large conventions are a separate but related form of tourism for the metropolitan area, as well as an important source of income; a single large convention can easily inject \$500,000 into the area. In summary, the unique character of each of Minnesota's tourist regions requires that each region have its own set of goals.

The goal of a billion-dollar industry, which includes an emphasis on the related employment and income generation for Minnesotans, tends to obscure two important points. First, although it is desirable to provide jobs in the tourist industry for many Minnesotans, it is equally important to provide leisure and outdoor recreation opportunities. This is true whether the recreation activity is a family picnic at a State park that generates few jobs or a stay at a resort that generates many jobs. Second, long-term benefits and costs of tourism are as important as short-term ones. Some resort and marina operators on popular Minnesota lakes are upset about publicity regarding problems of lake pollution; the operators feel that this affects their business adversely. However, this publicity may result in public sentiment and actions to ensure clear Minnesota lakes in the future--lakes that form the basis of the State's tourism industry. Thus, increasing Minnesota's tourist business is probably a desirable goal, but both the short-term and long-term benefits and costs of recreation programs to the Minnesota resident should be evaluated; attracting out-of-state vacationers whose costs to the State exceed the income they generate for Minnesotans is an undesirable policy.

### State Actions to Aid Tourism

Tables 1 and 2 identify problem areas and actions suggested by the review of recent tourist studies and discussions with members of tourist-related organizations and with tourists themselves. The tables include actions suggested by resolutions made at the Governor's Conference on Tourism in October, 1967, and at the follow-up "summit conference" on tourism held in January, 1968. The tables merely summarize the principal problems and actions identified by these sources--they do not evaluate or rank them. Each table covers one of the two broad areas described in the statement of research objectives--promotional programs and product programs for Minnesota vacationers.

### Sources of Data

In addition to the background information discussed above, the study had three other principal sources of data: a mail survey of families in a national panel (National Family Opinion); telephone and personal interviews of Twin Citians; and mail inquiries of a sample of individuals who, in response to advertisements, had mailed in coupons requesting tourist information from the State. The sampling method, objectives, and limitations of the information collection are discussed below for each of these sources. The methods, where feasible, conform with standards and definitions developed by national organizations concerned with travel research [26]<sup>1</sup>.

---

<sup>1</sup> Numbers in brackets refer to references cited in the Appendix.

TABLE 1  
 PROBLEM AREAS IN MINNESOTA'S PROMOTIONAL PROGRAMS AND POSSIBLE ACTIONS TO IMPROVE THEM

General Area for Possible State Action	Specific Problem	Potential Alternatives for Actions
<u>Level of Promotional Expenditures</u>	1. Insufficient funds for advertising and promoting tourism in the State. <sup>c</sup>	1. Increase State budget for advertising and promotion. <sup>c</sup>
M E D I A  P R O M O T I O N  D I R E C T  P R O M.  <u>Advertising Appeals, Messages</u> 1. Information 2. Persuasion	1. Insufficient awareness by State of the multi-activity vacation. <sup>c</sup> 2. Inadequate stress on things to see. <sup>c</sup>	1. Stress multi-activity vacation with something for everyone in the family all the time. <sup>c</sup> 2. Exploit State's culture, history, tradition, landmarks. <sup>c</sup>
<u>Markets and Media</u>	1. Insufficient information on characteristics of State's tourists and the best way to get Minnesota's vacation message to them. <sup>c</sup>	1. Undertake continuing studies of State's vacation market. <sup>c</sup>
<u>Regional Promotional Programs</u>	1. Inadequate promotion of regional attractions. <sup>a</sup> 2. Inadequate cooperation on promotion between <sup>b</sup> and within regions. <sup>c</sup>	1. Increase size of state-regional matching programs. <sup>a</sup> 2. Form legislative action committee with representatives from each of the six vacation regions. <sup>b</sup> Arrange for distribution of each region's vacation brochures throughout the State. <sup>c</sup> Coordinate each region's promotional program with major Chambers of Commerce for the region. <sup>c</sup>
<u>Sport &amp; Travel Shows</u>	1. Lack of exposure in sport and travel shows.	1. Utilize new booth in sport and travel shows. <sup>a</sup>
<u>Individual Facilities</u>	1. Misleading or misrepresented advertising by private owners of tourist facilities. <sup>a</sup> 2. Lack of awareness by local tourists of location of tourist information booths. <sup>c</sup>	1. Develop "Uniform Facilities Identification" to be administered by State Division of Tourism. <sup>a</sup> Require use of "truth in tourism" seal by tourism facility operators. <sup>a</sup> 2. Establish road signs that advertise the location of the information booths. <sup>c</sup>
<u>Community Festivals and Activities</u>	1. Lack of information about local and regional tourist events. <sup>a</sup>	1. Assemble and distribute information on tourist events through the Department of Economic Development. <sup>a</sup>

Sources:

<sup>a</sup>Resolutions passed at Governor's Conference on Tourism, St. Cloud, Minnesota, October, 1967.

<sup>b</sup>Resolutions passed at Summit Conference on Tourism, Hill City, Minnesota (Quadra), January, 1968.

<sup>c</sup>Interviews with State and Regional Tourist specialists and tourists.

TABLE 2

PROBLEM AREAS IN MINNESOTA'S VACATION PRODUCTS AND POSSIBLE ACTIONS TO IMPROVE THEM

General Area for Possible State Action	Specific Problem	Potential Alternatives for Actions
<u>Overnight Accommodations:</u> <ul style="list-style-type: none"> <li>• Resorts</li> <li>• Housekeeping Cottages</li> <li>• Public Campgrounds</li> <li>• Private Campgrounds</li> <li>• Vacation Homes</li> <li>• Hotels and Motels</li> </ul>	<ol style="list-style-type: none"> <li>1. Lack of continued development of vacation homes.<sup>a</sup></li> <li>2. Inadequate improvement of existing and development of new tourism accommodations and facilities.</li> <li>3. Lack of on-sale liquor facilities at better resorts, restaurants, hotels, motels.<sup>b</sup></li> <li>4. Discrimination in tourist accommodations on basis of race or creed.<sup>b</sup></li> </ol>	<ol style="list-style-type: none"> <li>1. Support FHA-insured vacation-home loans.<sup>a</sup></li> <li>2. Amend Consolidated FHA Act of 1961 to allow Dept. of Agriculture to participate with state and local government in financing recreational enterprises.<sup>a</sup> Make financial counseling available to tourist facilities.<sup>a</sup> Make "tax breaks" available to these groups.<sup>a</sup> Study ways of making private risk capital available to these groups.<sup>a</sup> Study new tourist facility complexes needed in the State and means of financing them.<sup>a</sup></li> <li>3. Permit licensing of private on-sale liquor facilities in smaller villages and townships.<sup>b</sup></li> <li>4. Encourage tourists -- regardless of race or creed -- to vacation in the State.<sup>b</sup></li> </ol>
<u>Access Facilities:</u> <ul style="list-style-type: none"> <li>• Highways</li> <li>• Information Booths</li> <li>• Airports</li> <li>• Wayside Rest Areas</li> </ul>	<ol style="list-style-type: none"> <li>1. Inadequate highways for potential tourists.<sup>a</sup></li> <li>2. Unsightly Minnesota highways.<sup>a</sup></li> <li>3. Inadequate sources of tourist information to nonresidents entering the State.<sup>a</sup></li> </ol>	<ol style="list-style-type: none"> <li>1. Request State legislature and federal government to increase -- not curtail -- funds for an accelerated highway building program.<sup>a</sup></li> <li>2. Develop highway beautification program to curtail junkyards and billboards.<sup>a</sup></li> <li>3. Build tourist information centers at all entry points on the interstate highway system.<sup>a</sup> Install tourist information centers at major air terminals throughout the State.<sup>a</sup></li> </ol>
<u>Sightseeing Attractions:</u> <ul style="list-style-type: none"> <li>• Natural: <ul style="list-style-type: none"> <li>• Lakes, Rivers, Falls</li> <li>• Forests and Wilderness Areas</li> </ul> </li> <li>• Man-Made: <ul style="list-style-type: none"> <li>• Iron Mines</li> <li>• Industrial Sites</li> <li>• Professional Sports</li> <li>• Amusement Parks</li> </ul> </li> </ul>	<ol style="list-style-type: none"> <li>1. Deterioration of natural resources.<sup>a</sup></li> <li>2. Inadequate utilization of dedicated areas.<sup>a</sup></li> <li>3. Lack of a National Park.<sup>a</sup></li> </ol>	<ol style="list-style-type: none"> <li>1. Public school education on conservation.<sup>a</sup> Administrative changes to improve liaison.<sup>a</sup></li> <li>2. Study and implement means of more effective utilization of dedicated areas.<sup>a</sup></li> <li>3. Establish the Voyageur National Park.<sup>a</sup></li> </ol>
<u>Participation Attractions:</u> <ul style="list-style-type: none"> <li>• Fishing and Water Sports</li> <li>• Hunting</li> <li>• Skiing and Winter Sports</li> <li>• Conventions</li> </ul>	<ol style="list-style-type: none"> <li>1. Poor fishing<sup>a</sup> and hunting<sup>a</sup> in Minnesota</li> <li>2. Discriminatory nature of hunting and fishing licenses to both in-state and out-of-state residents.<sup>a</sup></li> </ol>	<ol style="list-style-type: none"> <li>1. Supplement dedicated funds for needs of division of game and fish.<sup>a</sup> Expanded fish propagation program.<sup>a</sup> Prohibit spearing of game fish.<sup>a</sup> Increase number of Muskie designated lakes.<sup>a</sup></li> <li>2. Longer short-term nonresident fishing licenses.<sup>a</sup> Make game and fish license requirements follow those of voting requirements to new State residents.<sup>a</sup></li> </ol>
<u>Reservation Services</u>	<ol style="list-style-type: none"> <li>1. Obsolete method of handling tourist and travel reservations.</li> </ol>	<ol style="list-style-type: none"> <li>1. Use computer to handle tourist reservations.<sup>a</sup> Implement system to make reservations through information booths.<sup>a</sup></li> </ol>
<u>Legislature-Tourism Industry Coordination</u>	<ol style="list-style-type: none"> <li>1. Insufficient communication of the needs of the tourism industry to the Minnesota Legislature.<sup>c</sup></li> </ol>	<ol style="list-style-type: none"> <li>1. Form legislative action committee to consult with and to represent the interests of the entire tourism industry.<sup>b</sup></li> </ol>

Sources:

<sup>a</sup>Resolutions passed at Governor's Conference on Tourism, St. Cloud, Minnesota, October, 1967.

<sup>b</sup>Resolutions passed at Summit Conference on Tourism, Hill City, Minnesota (Quadra), January, 1968.

Mail Survey of National Family Opinion Panel

Sampling Method. National Family Opinion, Inc. (NFO), of Toledo, Ohio provides an interview panel of families throughout the United States that are matched in principal demographic characteristics to all families in the United States. The national panel is subdivided into regional panels, corresponding to the principal census regions of the United States. The regional panel for the North Central Census Region,<sup>1</sup> which corresponds closely to the natural market area for Minnesota vacationers, contains 8,370 families. These families are sampled four times per year (the first week of January, April, July, and October) by means of a Multicard, a standard-size punched card with space for three or four questions and answers. Clients of NFO provide questions that are reproduced on a Multicard, added to those from other clients, and mailed to panel members. The panelists fill out and return the Multicards, which are tabulated by NFO or its client. NFO guarantees an 80 per cent response rate.

One of the main reasons for using the NFO Multicard service is to learn more about the consumer behavior of a large, representative sample of American families. Besides the actual answers provided on the Multicard, additional information can be obtained: if a portion of the NFO panel families indicate some behavior in which the client is particularly interested (such as

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<sup>1</sup> The North Central Census Region is composed of twelve states: Ohio, Michigan, Indiana, Illinois, Wisconsin, Iowa, Minnesota, North Dakota, South Dakota, Missouri, Nebraska, and Kansas. These states will subsequently be called simply the "Midwest" or the "Midwestern states" in the rest of the report.

a vacation in Minnesota), follow-up questionnaires may be mailed to this group with a request for additional information.

Objectives. The present study used the Multicard both for its own data and as a screening device for two subsequent mail questionnaires. There were four principal objectives of the Multicard questionnaire:<sup>1</sup>

1. To compare demographic characteristics of families who are vacationers with those who are non-vacationers.
2. To identify the movements of vacationing families within and between states.
3. To identify--for Minnesota vacationers--(a) their principal vacation activities and (b) demographic and activity characteristics that relate to Minnesota vacations.
4. To develop the classifications for the subsequent NFO mail questionnaires.

The July 1 Multicard used in this study requested information on all "vacations" (trips mainly for recreational purposes where the respondent is away from home at least overnight) taken during the year before June 1, 1968, as well as those taken and planned for the summer of 1968. Of the 8,370 families surveyed by Multicard, 7,095 families (85 per cent of the total) provided

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<sup>1</sup> For brevity, copies of the questionnaires used in collecting data for the study are not included in this report. To aid in subsequent research, copies of these forms have been turned over to the Minnesota State Planning Agency.

usable replies.

This vacation information from the Multicard permitted all the respondents to be divided into four categories: (1) Minnesota vacationers; (2) non-Minnesota vacationers who had vacationed in Wisconsin, Michigan, or both;<sup>1</sup> (3) families who took vacations, but in none of the three Lake States; and (4) nonvacationers--those families who, because of lack of inclination or income, took no vacations during the year surveyed.

Follow-up questionnaires were mailed to two different groups of the Multicard respondents. The first group was composed of 809 families (a) who had vacationed in Minnesota or Wisconsin during the year before July 1, 1968 or (b) who intended to vacation in one of these two states during the summer of 1968. Analysis of the Multicard data showed that Wisconsin was more likely than Michigan to be a substitute vacation area for Minnesota, so Michigan vacationers were not sampled (although some families vacationed in Michigan as well as Wisconsin or Minnesota). Data on Wisconsin vacationers were sought to provide a basis of comparison for Minnesota. The objectives of this follow-up survey of vacationers were:

1. To evaluate awareness of the State's advertising and to identify magazines which vacationers read regularly.

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<sup>1</sup>For many Midwestern tourists, a vacation is "a week at the lake." Often these families view Minnesota, Wisconsin, and Michigan (subsequently termed the "Lake States" in this report) as substitutes for one another. Thus, the reason for the special interest of the report in the two other Lake States --and especially Wisconsin--is their attraction for Midwesterners who do not vacation in Minnesota.

2. To examine the degree of satisfaction and dissatisfaction with Minnesota tourist facilities, accommodations, and activities as compared with those of Wisconsin.
3. To determine how families make vacation plans--who in the family influences the decision, when the vacation decision and reservations are made, and the influence of factors such as friends' recommendations and previous experience with recreation sites.
4. To evaluate new "vacation concepts" under consideration by the State.

An example of these concepts is a packaged tour of scenic areas. These respondents will subsequently be referred to as the "Midwestern sample." Of the 809 families to whom questionnaires were sent, 706 families (87 per cent) provided usable replies.

The second group to whom follow-up questionnaires were mailed was composed of Multicard respondents who met the following criteria:

- They were Midwesterners, but not residents of one of the three Lake States.
- They vacationed for at least five consecutive days in southern Canada or a Midwestern state other than one of the three Lake States.
- A principal purpose of their vacation was something other than (1) visiting friends or relatives or (2) staying at a cabin or cottage that they owned.

This group of families is called the "Target sample," because it represents a

target market of consumers who live in Minnesota's natural market area, have the income and inclination to take a week's vacation, and are not constrained in their vacation planning by having to visit friends, family, or a cottage they own. The objectives of the follow-up survey of the Target sample were:

1. To determine their familiarity with Minnesota as a vacation area and with advertising of its vacation possibilities.
2. To determine why they did not vacation in Minnesota recently and the likelihood of their vacationing here in the future.

Of the 236 families in the Target sample to whom questionnaires were sent, 196 (83 per cent) provided usable replies.

Limitations. As with any statistical sample, care must be taken to avoid generalizations that do not follow from the data. In the NFO Multicard and follow-up mail survey, three limitations in the method of data collection deserve mention:

1. Family sample. The sample contains only families (two or more related individuals) and includes widows, widowers, and divorced persons with related children, as well as married couples with and without children. The sample does not contain single, unrelated individuals. This limitation is significant in a tourism study only insofar as it affects vacation activities of single individuals, such as skiing vacations.
2. Geographical area covered. The NFO information pertains only to families from the twelve-state area mentioned earlier. The results

obtained, therefore, may not apply to vacation behavior of families in New York or California. However, these twelve states are Minnesota's natural market area. For example, Sielaff's 1958 study of the Arrowhead Region [24] showed that the eleven states outside Minnesota in the Midwestern Region contributed 89 per cent of the out-of-state vacationers.

3. Behavior of non-respondents. About 85 per cent of the 8,370 NFO families in the regional Multicard panel responded to the survey. A statistical comparison of the demographic characteristics of the non-respondents and the respondents showed them to be similar. This suggests that vacation behavior of the respondents is probably typical of the entire NFO panel.

In addition, in any mail survey, there are opportunities for misinterpretation of questions. This is less likely to happen in personal or telephone interviews, because the interviewer may restate the question when he realizes that the respondent has misunderstood it. The study attempted to reduce the problem of misinterpretation, which is an important component of nonsampling error, by reviewing the questionnaire forms with the subcontractors (NFO and Mid-Continent Surveys) and by pretesting the forms.

#### Interviews of Twin Citians

Sampling Method. Two important factors dictated the choice of sampling method and objectives in interviewing Twin Citians. First, the Twin Cities Metropolitan Area is an important market of tourists for outstate Minnesota.

Second, telephone and personal interviews can explore vacation attitudes and decisions more intensively than mail questionnaires and can be done for a fraction of the cost of telephone or personal interviews of out-of-state vacationers. These two factors made it possible to achieve, by a two-stage interviewing procedure, the research objectives described on the following pages.

Basically, family vacation intentions for the summer were obtained by telephone interviews during the last ten days of June, and information about the actual vacations taken were obtained by personal interviews during the ten days following Labor Day. Because of not-at-homes and refusals, the initial sample of 500 households (who were sent a letter from the University of Minnesota introducing the study) resulted in 386 completed telephone interviews. The person answering the telephone in each household spoke for all members of the household in answering questions about their vacationing plans for the rest of the summer through Labor Day. Of these 386 households with whom interviews were completed, 195 (53 per cent) said that at least one member intended to vacation between July 1 and Labor Day. The rest either had no vacation plans or had already taken their vacation for the year. After Labor Day personal interviewers were sent to each of the 195 households that had indicated intentions to vacation. After at least three callbacks, the interviewers were able to complete 129 (66 per cent) of these 195 attempted interviews. The telephone and personal interviews were conducted by Mid-Continent Surveys, Inc., of Minneapolis.

The sample selection was made by University of Minnesota graduate students who had been instructed by University statisticians. A systematic

sample (the statistical equivalent of a simple random sample) was taken from Minneapolis and St. Paul telephone directories containing listed telephones as of May, 1968. These two directories generally correspond to Hennepin and Ramsey counties, respectively. A proportionate sample was drawn based upon housing-unit estimates for January 1, 1968. Thus, 32 per cent of the 500 telephone listings were from Ramsey County; 68 per cent were from Hennepin County.

Objectives. The first four objectives in the telephone and personal interviews of the Twin Citians were identical to those listed for the NFO follow-up mail survey of the Midwestern sample. There were also three additional objectives:

1. To identify changes in plans for summer vacations by Twin Citians.
2. To test awareness of the State's recently-developed vacation regions.
3. To test the potential effect of presently considered State actions on decisions regarding vacation destinations.

Limitations. Three potential limitations of the Twin Cities interviews are:

1. Use of listed telephone numbers. Unlisted numbers (that may belong to upper-income families) are omitted from the universe and, hence, from the sample. This factor may be offset partly by the children's telephone used by some families. Groups of unrelated individuals, such as three single girls who share an apartment, are included but are underrepresented. Individuals and families who do not have

telephones are omitted. For income reasons, however, the last group is less apt to take outstate vacations.

2. Behavior of non-respondents. Three call-backs were required in both sets of interviews in an attempt to obtain answers from everyone in the sample. To the extent that omissions occurred, the sample may be biased slightly. It was not possible to compare statistically the respondents and non-respondents, as was done on the NFO study, because no demographic data were available on the non-respondents.
3. Geographical area covered. The Twin Cities area is the most important single market for outstate vacation areas and warrants the detailed study given it here. As a market, however, it is unique-- results for the Twin Cities may not apply to Omaha or Chicago. For example, belated vacation plans by Twin Citians may suggest newspaper advertising here in July. However, the greater distance of Chicago from Minnesota's vacation areas forces earlier plans and reservations; thus, July ads in Chicago newspapers may be inappropriate.

#### Mail Survey of Coupon Mailers

Sampling Method. The State of Minnesota places advertisements to promote tourism in many regional editions and in a few national editions of both general-interest (Saturday Evening Post, Life) and special-interest (Field and Stream, Outdoor Life) magazines. Included in most of these advertisements is a coupon

that the magazine reader can mail to request vacation information. In most cases, the information promised--and sent--is of a general nature, and a subsequent information request is required to make an actual reservation at a lake resort or a ski lodge. Generally, the coupon is keyed so that it can be associated with the magazine in which it appeared, and the State records the information mailed in response to each coupon request.

The 20,000 coupons received by the State from February 1 through July 25, 1968, were tabulated by magazine issue and state of residence of the coupon mailer. The thirteen magazines that each provided more than 500 coupon returns were identified, and a random sample of 1,000 coupon mailers was selected,<sup>1</sup> each magazine being represented in proportion to the number of coupon requests it generated. One-page questionnaires and covering letters were mailed to the coupon mailers. Completed questionnaires were received from 307 respondents, about 31 per cent of the total.

Objectives. The coupon follow-up survey had three objectives:

1. To determine the usefulness of information sent to prospective Minnesota vacationers by the State in response to coupon inquiries.
2. To determine what information the State could provide that would increase the likelihood of the inquirer's choosing to vacation in Minnesota.

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<sup>1</sup> An attempt was made to exclude from the sample coupon mailers that were children, a group estimated to be about fifteen per cent of the total.

3. To determine if the coupon mailers actually vacationed in Minnesota.

The premise upon which this survey was based is that the potential Minnesota vacationer does not necessarily have a strong preference for a Minnesota vacation and that if the initial information provided him by the State is inadequate, he may take his vacation elsewhere.

Limitations. Two limitations of the coupon follow-up study deserve mention:

1. Adequacy of coupons as a measure of advertising effectiveness.

No satisfactory measure of advertising effectiveness exists at the present time. It is often argued that coupon returns are an inadequate measure because an ad may have developed brand awareness and stimulated sales among a large number of people without prompting them to mail in a coupon in response to the ad. But this statement may not be so true of the Nebraskan who sees an ad about Minnesota vacations in Life. If he does not mail in the coupon requesting information, the likelihood that he will use other sources of information to plan a week's vacation in Minnesota may be slight. Thus, although coupon inquiries may be an incomplete measure of an ad's effectiveness, they may be the best available.

2. Non-response bias. It is especially difficult to make projections from the mail response. For example, assume that one selects a

sample of 100 coupons clipped from an ad in Life; 50 responses are obtained, 20 of them stating that the coupon sender vacationed in Minnesota. Should one estimate that 20 per cent (20 divided by the original 100 questionnaires) or 40 per cent (20 divided by the 50 responses) vacationed in Minnesota? In general, because non-respondents are less apt to have vacationed in Minnesota (perhaps a cause of their lack of interest in the survey and their accompanying lack of response), 20 per cent is the more conservative figure.

The coupon follow-up survey will be referred to simply as the "Coupon sample" in subsequent references. Likewise, the group of individuals who mailed in coupons from the State's magazine advertisements will be termed the "Coupon mailers."

#### Methods of Analyzing and Presenting Data

Most of the data collected by personal, telephone, and mail surveys were encoded and keypunched in preparation for data analysis by digital computer. The computing facilities of the Numerical Analysis Center of the University of Minnesota were used. The computer analyses, as well as the raw data on which they are based, are available to those doing subsequent research on Minnesota tourism through the School of Business Administration of the University of Minnesota.

#### Summary of Important Definitions

It is desirable to develop definitions of terms used throughout the

report, some of which have already been used in this section. The first group of definitions pertain to the meaning of "vacation":

- A "vacation" is a trip taken mainly for recreational purposes where at least one member of the family is away from home at least overnight.
- The words "vacationer" and "tourist" will be used interchangeably and apply to an individual or family that takes a vacation as defined above.
- "Minnesota vacationers" are individuals or families who vacation in Minnesota. Thus, a family who resides in Minnesota but vacations only outside the state is not considered a "Minnesota vacationer." The same general rule applies in describing Wisconsin vacationers, as well as those for other states.

Two other definitions relate to geographic areas of special interest to the study:

- The "Midwestern states" are the twelve states in the North Central Census Region: North Dakota, South Dakota, Nebraska, Kansas, Missouri, Iowa, Minnesota, Wisconsin, Illinois, Indiana, Michigan, and Ohio. The Midwest is of particular interest to Minnesota because it is the natural market area for Minnesota vacationers-- about 90 per cent of them reside in one of these twelve states.
- The "Lake States" are the three Midwestern states of Minnesota, Wisconsin, and Michigan that historically have been identified

with lake-related vacations. For some Midwesterners a vacation in one of these states is a substitute for a vacation in one of the others; hence, the present study is concerned about Lake-States vacations outside Minnesota.

Finally, several definitions related to the sources of information for the study:

- The "Multicard sample" refers to the 7,095 Midwestern families in the National Family Opinion (NFO) panel who returned a punched-card mail questionnaire.
- The "Midwestern sample" refers to the 706 Midwestern families who vacationed in Minnesota or Wisconsin and who returned a seven-page mail questionnaire describing their vacationing habits. Names of these families were obtained by screening the answers provided by the Multicard sample.
- The "Target sample" refers to the 196 Midwestern families that vacationed somewhere in the Midwest outside the Lake States and appeared to have characteristics that made them a "target market" for a Minnesota vacation. These families filled out a two-page questionnaire. Names of these families were also obtained by screening the answers provided by the Multicard sample.
- The "Twin Cities sample" refers to either the 386 telephone interviews or the 129 personal interviews obtained from households living in Hennepin and Ramsey counties. In general, it will be apparent in the context of the discussion whether the reference

is to information obtained by telephone or personal interview.

- The "Coupon mailers" are the 20,000 individuals who clipped coupons from the State's magazine advertisements and mailed them in to obtain more vacation information. The coupons tabulated are those received by the State from February 1 through July 25, 1968.
- The "Coupon sample" refers to the 307 coupon mailers who completed a one-page mail questionnaire relating mainly to the value of the Minnesota tourist information they received.

#### 4. THE MINNESOTA TOURIST

This section analyzes the family that vacations in Minnesota. Answers are sought to three basic questions:

- Where do Minnesota vacationers come from?
- What are the principal reasons these vacationers come to Minnesota and how long do they stay?
- What are the socioeconomic characteristics of these vacationers?

Where relevant, data from prior studies will be cited, as well as the results of the current research. Because about 90 per cent of the people vacationing in Minnesota reside in the Midwest, background information on this Midwestern vacation market will be discussed first.

##### Midwestern Vacation Market

In this study a vacation is defined as a "trip taken mainly for recreational purposes where at least one member of the family is away from home at least overnight." It is important to note that this excludes such things as (1) a business trip or (2) a day-long picnic or fishing trip that does not involve an overnight stay. Vacation trips throughout the year are included, as is any vacation trip taken by at least one member of the family. The Multicard sample provides most of the data used in this section. As noted in Section 3, the Multicard is a short questionnaire sent to a representative cross-section of 8,370 families in the twelve Midwestern states to which 7,095 families responded. A comparison of the socioeconomic characteristics of the

respondents and non-respondents revealed no statistically significant differences. Thus, it is assumed the Multicard sample is representative of all families living in the Midwest. The responses from each of the twelve states as a percentage of the total varied by 0.8 per cent or less from the latest population data available on the states. Since there are about 14,000,000 families currently living in the Midwest, each Multicard response represents about 2,000 families.

#### Proportion of Vacationers

As shown in Table 3, 63 per cent of all Midwestern families have at least one or more members who take at least one vacation per year. Table 3 also shows that seven of the twelve states are within 3 per cent of the 63 per cent, so that there is a degree of consistency between the states. South Dakota (71 per cent) and Michigan (70 per cent) are significantly higher than the average; North Dakota (52 per cent) is significantly lower. The table, however, emphasizes an important fact that is often overlooked in today's prosperity: three of every eight families in the Midwest have had no member that during the year has taken a trip that qualifies as a "vacation," as defined in this study.

#### Families Taking Several Vacations

Number of Vacations. Of special importance to operators of recreation facilities are the families that take several vacations a year. The summary below of data from Table 3, identifies the relative importance in terms of the number of vacations taken:

TABLE 3

VACATION BEHAVIOR OF FAMILIES LIVING IN THE MIDWEST,  
JULY 1, 1967, TO JUNE 30, 1968<sup>a</sup>

State of Residence	No. of Vacations					Did Not Vacation	Total No. of Families	% Taking at Least One Vacation
	One	Two	Three	Four or More	Total			
Minnesota . . . . .	143	64	41	19	267	150	417	64%
Wisconsin . . . . .	216	85	44	25	370	203	573	65
Michigan . . . . .	427	192	99	42	760	333	1,095	70
North Dakota . . . . .	21	10	2	1	34	32	66	52
South Dakota . . . . .	31	14	6	5	56	23	79	71
Nebraska . . . . .	94	38	11	6	149	94	243	61
Kansas . . . . .	110	53	16	10	189	128	317	60
Missouri . . . . .	211	77	38	12	338	247	585	58
Iowa . . . . .	168	61	25	10	264	156	420	63
Illinois . . . . .	543	213	76	35	867	481	1,348	64
Indiana . . . . .	217	87	39	11	354	259	613	58
Ohio . . . . .	502	202	57	45	806	535	1,341	60
Total	2,683	1,096	454	221	4,454	2,641	7,095	63%

Source: Multicard sample of 7,095 families in the National Family Opinion panel living in the twelve Midwestern states listed in the table.

<sup>a</sup>A vacation is defined as a "trip taken mainly for recreational purposes where at least one member of the family is away from home at least overnight." This excludes activities like half-day picnic trips and business trips.

<u>Vacations per year</u>	<u>No. of Families</u>	<u>% of all Vacationers</u>	<u>% of all Families</u>
None . . . . .	2,641	-	37
One . . . . .	2,683	60	38
Two . . . . .	1,096	25	16
Three. . . . .	454	10	6
Four or more . . . .	<u>221</u>	<u>5</u>	<u>3</u>
Total	7,095	100	100

Thus, three of every eight families (38 per cent) in the entire sample take only a single vacation during the year. One of every four families takes two or more vacations.

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

<u>Vacations per year</u>	<u>No. of Families</u>	<u>Total Vacations</u>	
		<u>No.</u>	<u>%</u>
One . . . . .	2,683	x 1 = 2,683	38
Two . . . . .	1,096	x 2 = 2,192	31
Three. . . . .	454	x 3 = 1,362	19
Four or more	<u>221</u>	x 4 = <u>884</u>	<u>12</u>
Total	4,454	7,121	100

The 1,771 families that take more than one vacation per year took a total of 4,438 vacations during the year. Thus, 25 per cent of the families in the sample took 62 per cent of all the vacations taken. This group represents the most important single segment of the vacation market in terms of days on vacation and probably in terms of dollars expended. The importance of this market is even understated slightly because the average number of vacations taken by the most frequent vacationers is not four (as shown in the tabulation) but somewhat greater than four.

Length of Vacations. The following tabulation shows how the number of vacations taken per year relates to the total number of days on vacation.

<u>Vacations per Year</u>	<u>No. of Families</u>	<u>Days on Vacation</u>		<u>Vacation Days per Group</u>	
		<u>Total</u>	<u>Average</u>	<u>Total</u>	<u>% of All Days</u>
One . . . . .	2,683	11	11	30,400	44
Two . . . . .	1,096	18	9	20,100	29
Three . . . . .	454	25	8	11,300	17
Four or more. . .	<u>221</u>	<u>30</u>	<u>7</u>	<u>6,700</u>	<u>10</u>
Total	4,454			68,500	100

The tabulation shows that the greater the number of vacations taken by a family in a year, the greater the number of total vacation days. Thus, families that take one vacation per year average about eleven days on that vacation, whereas those that take four or more vacations are gone about thirty days. The third column demonstrates that the average length of the vacation falls slightly as the number of vacations increases. But the families taking more than one vacation per year are still the most important segment of the Midwestern vacation market. As shown in the last column, these families--who, as noted earlier, represent only 25 per cent of all Midwestern families--take 56 per cent of the vacation days (spent away from home) of all the families living in the Midwest.

Characteristics

It is possible to set down some of the characteristics of Midwestern families who are non-vacationers, who take a single vacation per year, and who take more than one vacation. Four of the more common characteristics of

families that might be related to vacation behavior were studied. These, which are graphed in Figure 1, are: homemaker's age, occupation of the head of the family, family income, and the size of the family. Figure 1, which was developed from the Multicard sample, suggests the following conclusions:

- Family income is highly related to the number of vacations taken. In general, the greater the family income, the more likely the family is to take a vacation. Also, on the average, the greater the family income, the more vacations taken. Over half of the Midwestern families that vacation have incomes exceeding \$9,000 per year, and they take more than two thirds of the vacations.
- The five classes of families grouped by age of the homemaker show a remarkable consistency for the total number of vacationing families. However, the group in which the homemaker is between forty and forty-nine years of age shows the largest total vacation market (about two million Midwestern families) and also the highest proportion of vacationing families.
- The largest vacation market is among families whose breadwinner is a craftsman or foreman, which has about 1.8 million families who take vacations and about 0.9 million who do not. However, (1) professional and technical occupations and (2) managers, officials, and proprietors--each group with about 1.5 million vacationing families--have a higher proportion of vacationing families within their groups.

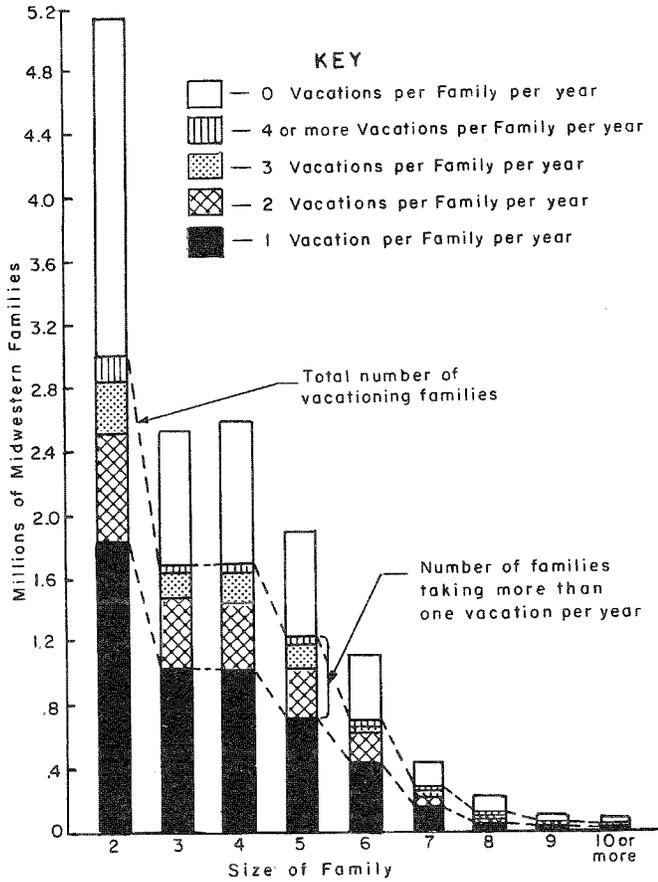
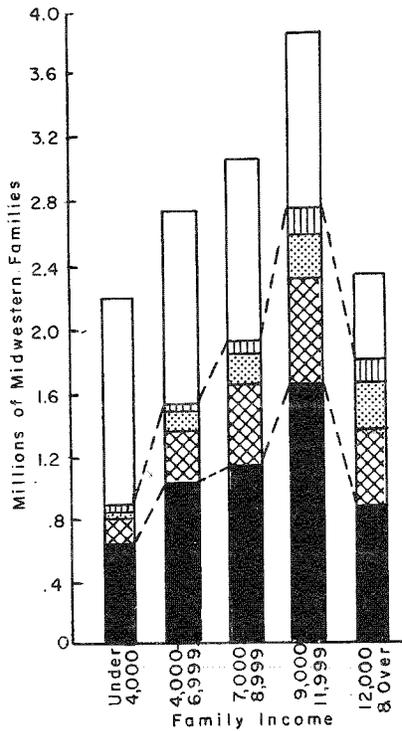
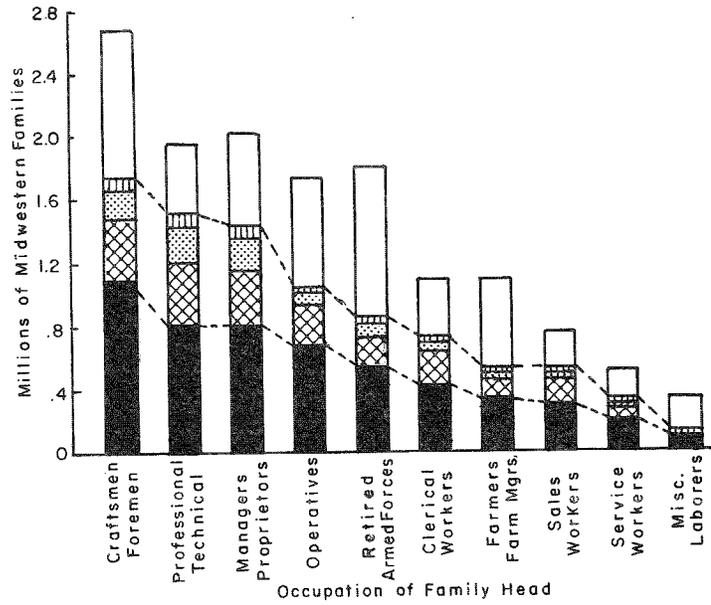
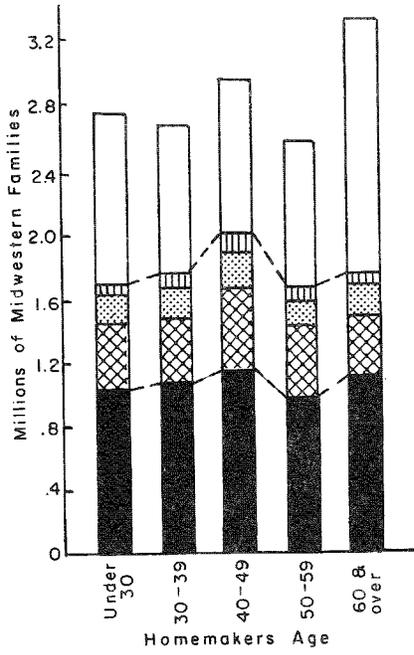


Fig. I. Midwestern vacation market, showing the relation between number of vacations per year taken by the family and selected characteristics of the family.

Tourist Flows

Sources of Minnesota Vacationers: 1948 to 1968

Before analyzing in detail where present vacationers in Minnesota come from, it is of interest to determine what past information is available. The principal studies from 1948 to the present that provide information on the states of resident of Minnesota vacationers are summarized in Table 4.

The lower portion of Table 4 emphasizes the lack of comparability in the studies. For example, all but the 1958 study cover the entire state; the 1958 study [23, 24], which covers only nineteen northern Minnesota counties, is included because of the complete absence of other tourist studies of Minnesota for the 1950's. Other problems of comparability also arise. Some of the studies cover vacation trips during the entire year; others deal only with summer trips. Two of the studies [28, 30] deal only with resort guests, thereby eliminating campers or touring vacationers who do not stay at resorts. The 1963 study of motel guests [29] includes touring vacationers, but covers business visits as well. The 1966 study [19] includes only summer vacationers traveling along Minnesota highways. In spite of these problems of comparability, the studies are included for one main reason: they are all that are available.

Admitting that minor percentage variations in Table 4 are insignificant because of comparability questions, three important generalizations emerge:

- The principal source of Minnesota vacationers is Minnesota residents--about two fifths to one half coming from within the state.

TABLE 4

STATES OF RESIDENCE OF MINNESOTA VACATIONERS FOR SELECTED YEARS, IN PERCENTAGE OF TOTAL VACATIONERS

Residence	Year					
	1948	1958 <sup>a</sup>	1963	1963	1966	1968
Minnesota . . .	48%	30%	51%	49%	45%	41%
Iowa . . . . .	11	18	14	9	12	11
Illinois . . . .	14	20	11	12	7	12
Wisconsin . . .	2	2	2	6	6	9
North Dakota .	2	1	3	3	3	5
South Dakota .	2	1	1	2	2	4
Nebraska . . . .	4	4	3	2	... <sup>b</sup>	5
Kansas . . . . .	3	3	2	... <sup>b</sup>	... <sup>b</sup>	2
Missouri . . . .	6	5	3	2	2	3
Indiana . . . . .	2	6	4	2	... <sup>b</sup>	3
Michigan . . . .	1	... <sup>b</sup>	1	2	3	3
Ohio . . . . .	... <sup>b</sup>	2	... <sup>b</sup>	1	2	2
Canada . . . . .	... <sup>b</sup>	2	... <sup>b</sup>	5	3	... <sup>c</sup>
All Other . . .	5	6	5	5	15	... <sup>c</sup>
Total	100%	100%	100%	100%	100%	100%

Description of Sample

Season . . . .	summer	summer	entire year	entire year	summer	entire year
Vacationers . .	resort guests	resort guests, summer-home owners, canoe travelers, vacation inquirers	resort guests	motel guests	highway travellers	residents of 12-state region
Source of data . . . .	mail & personal surveys of resort guests	mail & personal surveys of four groups cited above	mail survey of resort operators	mail survey of motel operators	survey mailed in by highway traveller	mail survey of residents

Sources: Data for 1948, reference 28; for 1958, references 23 and 24; for 1963, reference 30 (first column) and 29 (second column); for 1966, reference 19; and for 1968, the present study.

<sup>a</sup>The 1958 study covers only nineteen counties in northern Minnesota. The other studies cover the entire state.

<sup>b</sup>Less than 0.5 per cent of the total.

<sup>c</sup>0 per cent because the sampling method excluded residents from outside the 12-state Midwestern region.

- Iowa and Illinois vie for second place as a source of vacationers. Together they contribute about one fourth of the total.
- Nebraska, Kansas, and Missouri collectively contribute about one tenth of the total.

The 1958 study, which deals with only nineteen counties, tends to understate the percentage of Minnesota residents vacationing here by about 15 per cent and overstate the combined percentage from Iowa and Illinois by about the same amount. This might be explained by the limited geographical coverage or by the sampling method.

The other striking difference in the six studies is the percentage of vacationers contributed by Minnesota's neighbors on the east and west: North Dakota, South Dakota, and Wisconsin. The 1948 and 1958 studies showed this percentage to be about 6 per cent whereas the more recent studies give about two to three times that value. Thus, the recent results suggest that continued attention be given to attracting vacationers from the Dakotas and Wisconsin.

Kinds of Vacations. Vacation trips taken to a state generally fall into two categories. The first kind of trip occurs when the state is the principal goal or destination of the vacationer, often resulting in the majority of the vacation time (and vacation dollars) being spent in the state. This is the focus of the present study because most state efforts are--and should be--directed at making the state more desirable as a place to go and

spend one's vacation. The second kind of vacation role a state can play is as a "transit" area through which a tourist travels to get to his principal vacation area. A state benefits in the short-run from being a transit area by selling gasoline, food, or overnight accommodations to tourists who are passing through the state. In the longer run, if a tourist's appetite to visit the state as a destination area in the future is whetted by his traveling through the state, the state serves to benefit more significantly.

Minnesota as a Destination State

The Midwestern destination of the 63 per cent of the Midwestern families who take vacations is shown in Table 5. Note that the total of 7,121 vacations shown in the bottom right-hand corner of the table is obtained by weighting the families by their number of vacations, as was done above. The fact that the 7,095 families sampled (the total shown in Table 3) is about equal to the 7,121 total vacations (the total shown in Table 5) is due to chance. This merely shows that the number of families not taking vacations was approximately equal to the number of vacations beyond the first taken by the multiple-vacation families.

Table 5 provides several kinds of information. Reading horizontally across the row for one of the states, one can tell where residents of that state went for vacations. Thus, the row for Minnesota shows that of the 470 vacations taken by families sampled, 178 were spent within the state, 55 were spent in Wisconsin, and so on. Note that the principal destinations of 152 vacations taken by Minnesotans were states or countries outside the Midwest

TABLE 5

## STATES OF RESIDENCE AND DESTINATION OF VACATIONERS LIVING IN THE MIDWEST, 1967-1968

Residence	Destination for Vacation															Total
	Minn.	Wis.	Mich.	N.D.	S.D.	Neb.	Kan.	Mo.	Ia.	Ill.	Ind.	Ohio	S. Canada	Other State/Country	Unspeci-fied	
Minnesota . . .	178	55	13	8	17	8	2	4	7	13	2	1	9	152	1	470
Wisconsin . . .	37	275	37	2	7	2	1	4	8	33	8	5	22	175	2	618
Michigan . . .	14	24	485	5	2	6	6	14	10	40	19	42	86	514	9	1,276
North Dakota .	20	3	1	8	1			1	2				2	13		51
South Dakota .	16	1		2	24	2		5	6	3	1		4	33		97
Nebraska . . .	20	3	2		11	28	19	16	6	14	3	1	1	99	4	227
Kansas . . . .	10	2	2		3	12	32	44	5	9	1	2	4	174	4	304
Missouri . . .	12	6	6	3	5	5	21	160	11	17	11	6	8	252	4	527
Iowa . . . . .	48	26	5	2	11	13	9	29	46	25	7	5	6	166	7	405
Illinois . . . .	55	207	119	1	10	11	12	65	30	128	50	21	49	573	6	1,337
Indiana . . . .	12	20	56		2	4	2	18	3	27	80	30	8	285	5	552
Ohio . . . . .	8	17	95		1	3	5	7	8	33	33	220	62	757	8	1,257
<b>Total</b>	<b>430</b>	<b>639</b>	<b>821</b>	<b>31</b>	<b>94</b>	<b>94</b>	<b>109</b>	<b>367</b>	<b>142</b>	<b>342</b>	<b>215</b>	<b>333</b>	<b>261</b>	<b>3,193</b>	<b>50</b>	<b>7,121</b>

Source: Multicard panel.

and southern Canada. Reading vertically down the column for a state, one can tell where the state's vacationers come from. Thus, of the 430 Minnesota vacations, 178 were by Minnesota residents, 37 were by Wisconsin residents, and so on. The table illustrates that the number of Minnesota vacationers contributed by each Midwestern state depends upon three important factors: (1) the population of the state, (2) the proximity of the state to Minnesota, and (3) the proximity of the state to other vacation states (such as Michigan or Wisconsin) that produce vacations comparable to Minnesota's--fishing, swimming, and other water sports.

Market Comparisons among the Lake States. Table 6, which is derived from the Multicard data given in Table 5, permits the comparison of Midwestern vacation markets among the Lake States of Minnesota, Wisconsin, and Michigan. In all, Michigan appears to have about twice as many vacationers as Minnesota, and Wisconsin has about 1.5 times as many. Bearing in mind that each family in the Table 6 represents about 2,000 Midwestern families, the table emphasizes several interesting points:

- Although Minnesota and Michigan each send the other about the same number of vacationing families, Minnesota sends Wisconsin about 110,000 families and receives only 74,000, which represents a net loss of 36,000 family vacations.
- Minnesota attracts at least twice as many family vacationers as either Wisconsin or Michigan from each of the five states of North Dakota, South Dakota, Nebraska, Kansas, and Missouri. However, in no case does one of these states contribute more than

TABLE 6

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

State of Residence	Destination for Vacation, by Numbers			Destination for Vacation, by Percentage		
	Minnesota	Wisconsin	Michigan	Minnesota	Wisconsin	Michigan
Minnesota . . . . .	178	55	13	41%	9%	2%
Wisconsin . . . . .	37	275	37	9	43	4
Michigan . . . . .	14	24	485	3	4	59
North Dakota . . . . .	20	3	1	5	a	a
South Dakota . . . . .	16	1		4	a	
Nebraska . . . . .	20	3	2	5	a	a
Kansas . . . . .	10	2	2	2	a	a
Missouri . . . . .	12	6	6	3	1	1
Iowa . . . . .	48	26	5	11	4	1
Illinois . . . . .	55	207	119	12	33	14
Indiana . . . . .	12	20	56	3	3	7
Ohio . . . . .	8	17	95	2	3	12
Total	430	639	821	100%	100%	100%

Source: Multicard panel.

<sup>a</sup>Less than 0.5 per cent.

5 per cent of Minnesota's total. Surprisingly, more than twice as many North Dakotans vacation in Minnesota as in their home state (see Table 5).

- About 96,000 Iowa families spend vacation time in Minnesota, about 52,000 in Wisconsin, only 10,000 in Michigan.
- The Lake States compete most fiercely for the vacationer from Illinois, because more than three quarters of a million Illinois families vacationed in one of the Lake States. Wisconsin captured 54 per cent of this market; Michigan, 31 per cent; and Minnesota, only 15 per cent.
- In the sizable Indiana-Ohio market, Michigan has overwhelming dominance. The total number of Lake States vacations taken by residents of Indiana and Ohio in 1967-68 was slightly more than half those taken by Illinois residents. Of these, 72 per cent were taken in Michigan, 18 per cent in Wisconsin, and 10 per cent in Minnesota.

Table 6 also illustrates the larger in-state markets that are available to Michigan and Wisconsin than to Minnesota. For example, Michigan residents take about 970,000 family vacations in the state, which represents 59 per cent of its total Midwestern market, whereas Minnesota's families take only about 356,000 vacations in their home state, representing only 41 per cent of the total.

Minnesota's Market Share of Vacations. Figure 2 illustrates the size

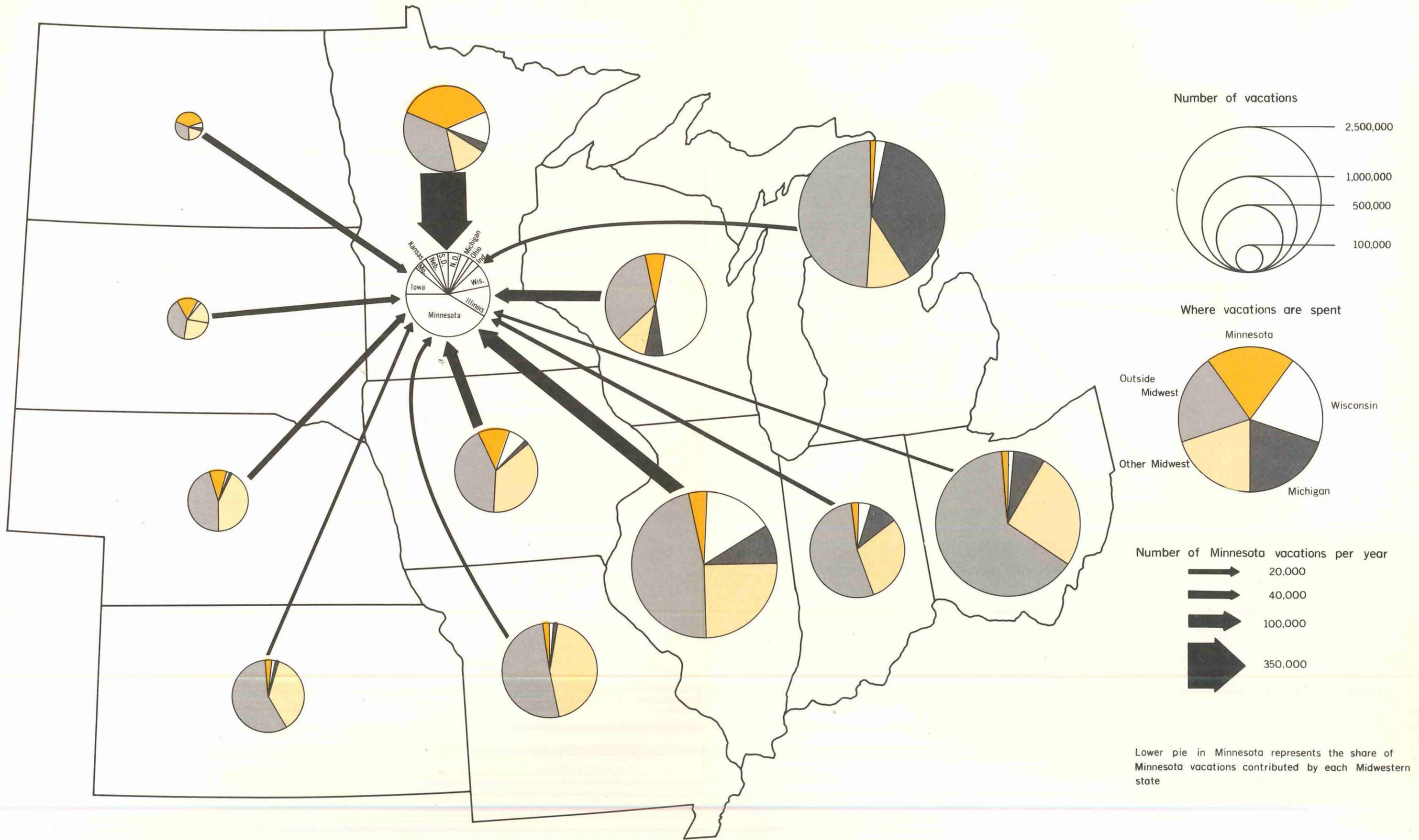


Figure 2 - Size of vacation markets in Midwestern states and source of Minnesota vacationers

of the vacation market among families in each of the twelve Midwestern states. The number of family vacations in the figure have been projected for the entire Midwest by multiplying the Table 5 values by 2,000 (because the sample represents 1/2,000 of the entire Midwest). The proportion of the vacation market in each state captured by Minnesota--Minnesota's market share of the state's total vacation market--is also shown. In interpreting the figure, four points should be noted:

1. The size of the circular pie in each state represents the estimated total number of vacations taken by that state's families during the 1967-68 year studied in the Multicard sample. Thus, the estimate of 2,674,000 vacations taken by members of Illinois families is represented by the very large Illinois pie.
2. Each pie is divided into the following five segments: Minnesota vacations, Wisconsin vacations, Michigan vacations, vacations in the Midwest outside the Lake States, and vacations outside the Midwest.
3. The number of Minnesota vacationers from each Midwestern state is shown by the thickness of the arrow.
4. The lower-pie located in Minnesota in Figure 2 corresponds to the number and percentage distribution of Midwestern families vacationing in Minnesota.

Generally, Figure 2 illustrates that Minnesota has a geographic advantage over Wisconsin and Michigan in the states west and south of Minnesota,

which permits it to capture the major share of the Lake-States vacation market in these states. The Illinois vacation market, whose size and location makes it of great potential importance to Minnesota, is dominated by Wisconsin. However, the completion of Interstate Highway 94 through Wisconsin in the fall of 1968 should make Minnesota more accessible to vacationers from Illinois.

Man-made lakes and recreation areas in Midwestern states that historically have not offered the opportunity of lake-related vacations may cut into the dominance in this vacation market by the three Lake States; examples of such states are South Dakota, Nebraska, and Missouri. Table 5 shows that Missouri, through areas such as its Ozarks region, is attracting almost as many Midwestern vacationers as Minnesota. Iowa and Nebraska are both about equidistant from Minnesota and Missouri, yet Minnesota has been able to attract about 50 per cent more vacationers from these two states than has Missouri. However, Illinois and Kansas, states that are nearer Missouri than Minnesota, contribute almost 70 per cent more vacationers to Missouri than Minnesota. Thus, even within the Midwest, the three Lake States probably no longer have the monopoly on lake-oriented vacations they once had.

#### Minnesota as a Transit State

Table 5 is intended to be used principally in analyzing the "destination state" kind of vacation. It may also be used to draw inferences about the "passing-through" or "transit" vacations mentioned earlier that involve Midwestern residents traveling to other Midwestern states or to southern

Canada. For example, two families that lived in Wisconsin traveled to North Dakota as their principal destination state; seven other Wisconsin families traveled to South Dakota. These nine families represent about 18,000 families that probably traveled through Minnesota to their destination state and generated income and employment for Minnesotans by eating meals or staying overnight in the state. Similarly, the fourteen Iowa and Missouri families that had southern Canada as their main vacation destination represent about 28,000 families that probably passed through Minnesota. Since the sample period coincided with the operation of Canada's "Expo '67" world's fair, the number of vacationers going to southern Canada in other years may be considerably smaller.

The transit-vacation traffic does generate a limited amount of income and employment for the states passed through.<sup>1</sup> However, as the interstate highway system expands, motorists on these highways will make fewer stops and spend less money in the states through which they pass. Thus, the principal

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<sup>1</sup> Note that there are several groups of transit vacationers going through Minnesota that cannot be studied with the data given in Table 5. These include families who live outside the Midwest going through Minnesota (1) to other Midwestern states (Montanans going to Wisconsin) or (2) to states outside the Midwest (Montanans going through Minnesota on their way to Pennsylvania). Because the Multicard sample was restricted to Midwesterners, there were no data in the present study collected on these groups. Midwesterners going through Minnesota on their way to a destination state outside the Midwest are not shown separately on Table 5, although these data are available if the State desires to tabulate them. For example, Illinois families traveling through Minnesota to a vacation in Montana are included among the 573 Illinois families in Table 5 who had "Other State/Country" as their destination.

long-run benefit to a state that is a transit state for a family's vacation is to "trade-up" the family's perception of the state to make it a destination state on a future vacation.

The present report will emphasize Minnesota as a destination state rather than as a transit state, because destination-type visitors have the greatest economic importance to the State.

#### Vacation Purposes and Length of Stay

Three overlapping concepts of tourist activities or appeals can be identified by general questions that are often asked of vacationers:

- What was your principal reason for coming to Minnesota?
- What activities did you participate in while you were here?
- What did you like (or dislike) about Minnesota?

This section of the study seeks answers to the first question because adequate answers to it explain why the vacationer came to Minnesota rather than going elsewhere. The second question deals with vacation activities while on vacation and does not necessarily elicit the same answers as the first question. For example, an Iowan who came to Minnesota principally to fish may identify tennis and hiking as other vacation activities. They are generally not the principal reason he traveled five hundred miles to Minnesota for a vacation, but their absence may result in a boring vacation and the vacationer's decision not to return. The final question--likes and dislikes about Minnesota--will be discussed in Section 6 on satisfactions and dissatisfactions with Minnesota vacations, attractions, and facilities.

Vacation Purposes in Past Studies

In 1948 vacationers in Minnesota resorts [28] were asked simply, What did you like most about vacationing in Minnesota? This is a variation on the third general question given above. Unfortunately, the resort vacationers were not asked to identify explicitly the principal purpose of their Minnesota vacation. The responses showed that fishing ranked first and was mentioned by 46 per cent of all vacationers, scenery ranked second (33 per cent), and climate and weather were third (26 per cent).<sup>1</sup>

The 1958 survey of vacationers in the nineteen-county area of northern Minnesota [23, 24] found the following "purposes of first importance" for travel in the nineteen-county area:

<u>Purposes</u>	<u>% from Minnesota</u>	<u>% from Illinois</u>	<u>% from Iowa</u>	<u>% from All States</u>
Rest and relaxation. .	65	51	55	55
Hunting and fishing. .	31	55	50	44
Sightseeing. . . . .	16	5	8	11
Visit friends and relatives. . . . .	4	4	3	5

In this area, which corresponds roughly to what is presently the Arrowhead and Heartland vacation regions of Minnesota, hunting and fishing were five to ten times as important as sightseeing for residents of Illinois and Iowa. For Minnesotans, hunting and fishing were only about twice as important as sightseeing. However, rest and relaxation was of overwhelming importance and

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<sup>1</sup> In all of these comparisons of factors attracting vacationers, the respondents were allowed to mention more than one answer. Therefore, a total of all answers would exceed 100 per cent.

ranked first; visiting friends and relatives was the least important and ranked fourth.

Because the sample included only resort guests, the proportion having the principal purpose of visiting friends and relatives was less than for a sample of all vacationers in the state--many of whom would be staying with friends or relatives and would be eliminated from the sample.

A study of the northern Minnesota vacation market in 1963 [15] asked a sample of families in Minnesota, Iowa, and Illinois what the "main purpose of their most recent vacation" had been (this need not have been a Minnesota vacation). Of those taking vacations, about one third gave "visiting friends and relatives" as a reason; another third gave "rest, relaxation, or get away for a change" as a reason. About 10 per cent cited fishing as a main purpose of their vacation, and 5 per cent mentioned sightseeing.

In 1964 about three hundred families living within five hundred miles of Minnesota [17] were asked the primary purposes of vacation trips taken the past year. About one fourth of the families had gone to Minnesota and about three fourths to other states. About half the families vacationing in Minnesota gave fishing or swimming as their principal purpose, and about one fourth cited sightseeing; these proportions were reversed for families in the region who selected a vacation area outside Minnesota. This contrast suggests that fishing and water-related activities were this sample's principal reasons for vacationing in Minnesota; most families went elsewhere for sightseeing.

A traveler survey along Minnesota highways [19] conducted in the summer of 1966 gave the following breakdown of trip purposes:

<u>Purpose</u>	<u>%</u>
Rest and relaxation . . . . .	26
Friends and relatives . . . . .	32
Enroute to another state. . . . .	24
Business reasons. . . . .	10
Combined business and pleasure. .	<u>8</u>
Total	100

Although a finer breakdown would be desirable, these data emphasize the importance of visits to friends and relatives as a principal reason for a vacation trip. A 1963 study by the U.S. Bureau of the Census lends credibility to the significant percentage of vacations to visit friends and relatives, showing that about 40 per cent of "overnight trips" had this reason as the principal purpose.

Vacation Purposes in Present Study

The solid line in Figure 3 shows the principal purpose of Minnesota vacations taken by Midwestern families, expressed as a percentage of all the principal vacation purposes cited.<sup>1</sup> The purposes are arranged in Figure 3

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<sup>1</sup>Many vacations have more than one main purpose--thus, an Illinois family may spend two weeks in Minnesota, one week at a resort in northern Minnesota and the second week visiting relatives in Mankato. About 20 per cent of the Multicard sample cited more than one "main purpose" for their vacation. Because each main vacation purpose is expressed as a percentage of all purposes identified, the maximum percentage achievable by a single vacation purpose would theoretically be about 83 per cent. For example, suppose 100 families were sampled, that 80 families gave "visit friends and relatives" as the main purpose of their vacation, and that 20 families cited both "visit friends and family" and "fishing" as main purposes. Although 100 per

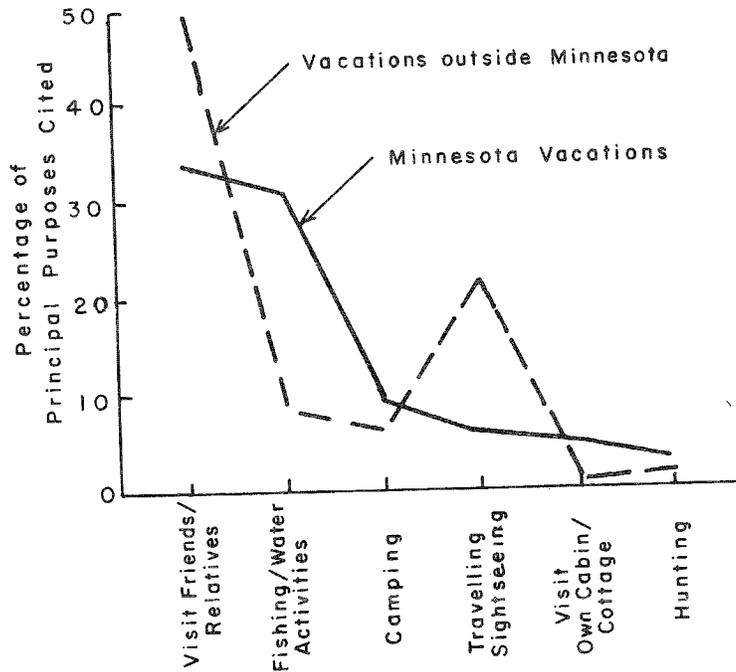


Fig. 3 Principal purposes of vacations of families whose only Lake-State vacation was Minnesota on (1) their Minnesota vacation and (2) their vacation outside Minnesota.

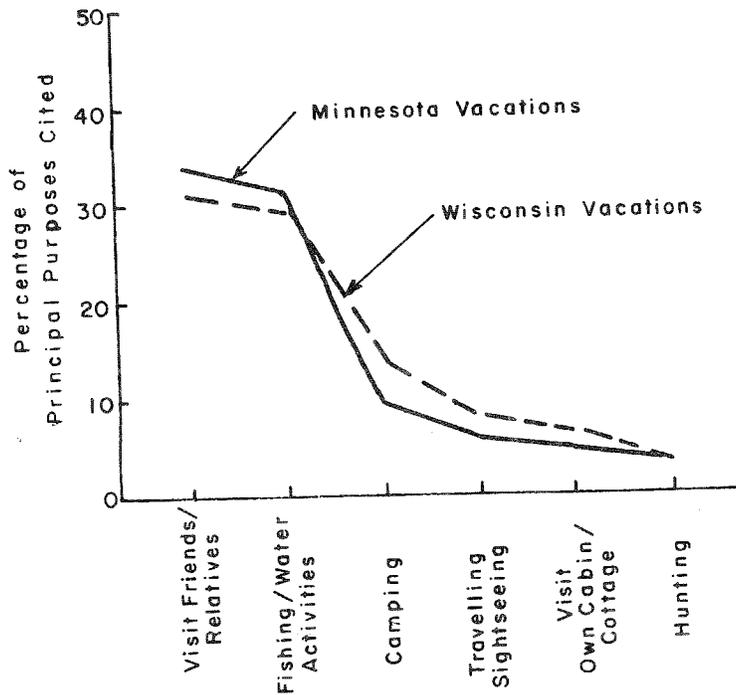


Fig. 4 Principal purposes of vacations of families whose only Lake-State vacation was in the state indicated.

in order of importance for Minnesota, going from left to right from "visiting friends and relatives" and "fishing and water activities" to "hunting". Various other activities not shown in the figure accounted for less than 10 per cent of the total purposes identified.

The dotted line in Figure 3 is intended to answer another important question about the vacation purposes of the families that take at least one vacation per year in Minnesota but take other vacations during the year in other states. Basically, the question is, What principal purpose do these families have in vacationing in destinations other than Minnesota? Two purposes of overriding importance emerge. The families go outside Minnesota principally (1) to visit friends and relatives and (2) to travel and sightsee. The second point has important advertising implications, because, clearly, most people familiar with Minnesota do not come here to sightsee.

It became apparent from studying the movement of Midwestern tourists that Minnesota's principal Lake-States competitor is Wisconsin. It is of interest to know that the principal vacation purposes of Wisconsin tourists are virtually identical with those of Minnesota (see Figure 4).

#### Length of Stay

Minnesota vacationers' length of stay can be tabulated as follows:

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cent of the families gave "visit friends and relatives" as their main purpose, that answer represents only 83 per cent (i.e., 100 of 120) of all the purposes cited.

<u>Length of Stay on Minnesota Vacation</u>	<u>Description of Length of Stay</u>	<u>% of All Vacations</u>
1 to 2 days . . . . .	"week-end"	6
3 to 5 days . . . . .	"less than a week"	41
6 to 8 days . . . . .	"about a week"	25
9 to 11 days . . . . .	"about 10 days"	12
12 to 14 days . . . . .	"about 2 weeks"	12
15 or more days . . . . .	"more than 2 weeks"	<u>4</u>
Total		100

To generalize, (1) about one half of the vacationers stay more than six days, and (2) about one fourth of the vacationers stay ten days or more. Thus, only one family in six qualifies as "about-two-weeks" or "more-than-two-weeks" vacationers.

Vacation Purpose Related to Length of Stay

Table 7 relates the principal purpose of a Midwestern family's vacation in Minnesota to their length of stay. Fortunately both for the Minnesota tourist and for Minnesota families whose relatives and friends visit them here, it was found that (1) about two thirds of the vacation visits to friends and relatives living in Minnesota are five days in duration or less; (2) about two thirds of the fishing vacations taken in Minnesota are six days or longer (however, only about one fishing vacation in five is twelve days or longer); (3) about one half of the camping vacations taken in Minnesota are six days or longer.

In terms of income and employment generated for Minnesotans, fishing vacations (requiring overnight lodging in permanent facilities like cottages or resorts) are clearly more important to the State than vacationers whose

TABLE 7

PRINCIPAL PURPOSE OF VACATIONS TAKEN BY FAMILIES VACATIONING IN  
MINNESOTA AS RELATED TO THE LENGTH OF THEIR STAY

Principal Purpose of Vacation	Days on Minnesota Vacation						Total
	1-2	3-5	6-8	9-11	12-14	15 or More	
Single Purpose							
Visit friends/relatives . . . . .	3%	16%	7%	2%	1%	1%	30%
Fishing . . . . .		5	5	3	3	... <sup>a</sup>	16
Camping . . . . .	1	3	2	1	1	... <sup>a</sup>	8
Hunting . . . . .		2				... <sup>a</sup>	2
Multiple Purpose							
Visit friends/relatives and fishing . .		2	3	1	2		8
Visit friends/relatives and camping . .							
Fishing and camping . . . . .		1	1	1	1	... <sup>a</sup>	4
Other single- and multiple-purpose vacations	2	11	8	4	4	2	31
<b>Total</b>	<b>6%</b>	<b>40%</b>	<b>26%</b>	<b>13%</b>	<b>12%</b>	<b>3%</b>	<b>100%</b>

Source: Multicard sample.

<sup>a</sup>Less than 0.5 per cent.

principal reasons for vacationing here are to visit friends and relatives or to camp.

### Tourist Characteristics

The socioeconomic characteristics of Minnesota vacationers are discussed in this section from three points of view:

- The relative importance of families having various socioeconomic characteristics in the Minnesota vacation market.
- A comparison of these characteristics of Minnesota vacationers with those of Wisconsin vacationers.
- A comparison of these characteristics of Minnesota vacationers with those of the Midwestern vacation market generally.

### Characteristics of Minnesota Tourists

The solid line in each part of Figure 5 shows the distribution or profile of the families that vacation in Minnesota on the basis of such socioeconomic characteristics as family size or income. In looking only at the solid line in each diagram, several generalizations are suggested for the characteristics studied: (1) Minnesota attracts mainly families whose homemaker is under fifty. These families are more apt to be "doers" (fishermen, campers) than "watchers" (sightseers). (2) Two thirds of the families have family heads that are (a) craftsmen or foremen, (b) professional or technical, (c) managers, or (d) operators. (3) Two thirds of the families vacationing here have four or fewer members. (4) About half the families have incomes exceeding \$9,000 per year.

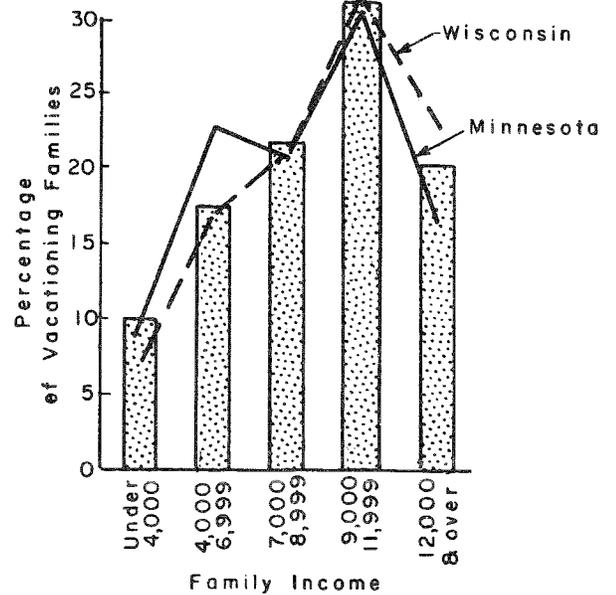
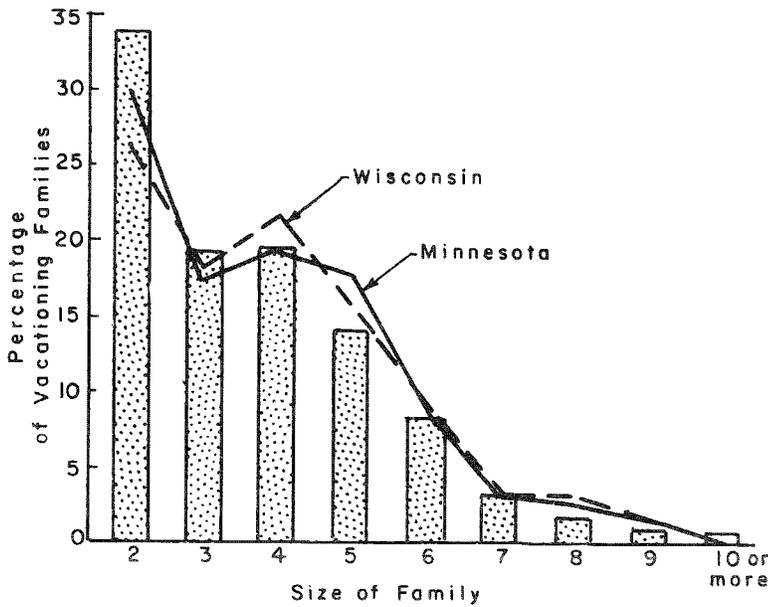
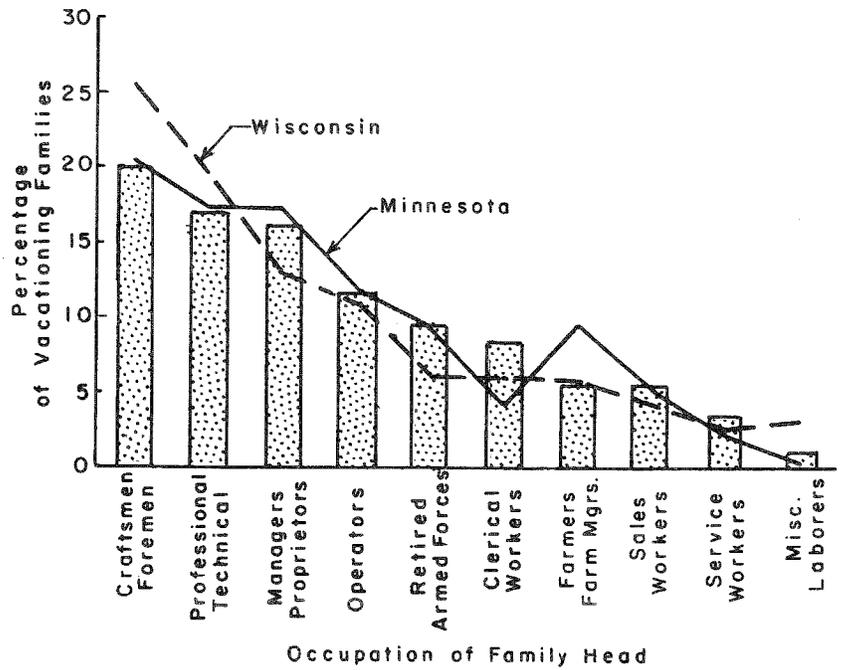
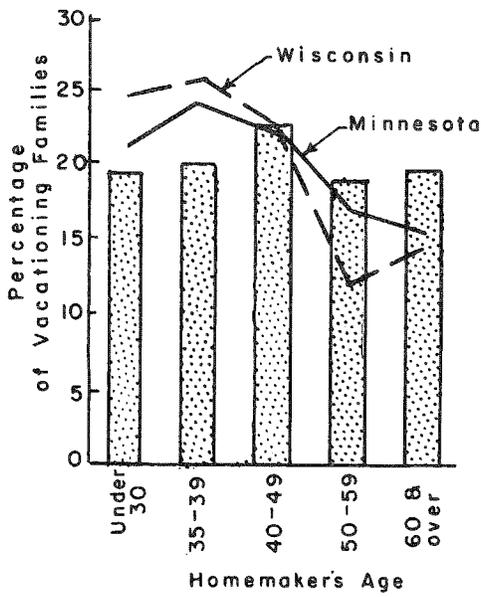


Fig. 5 Distribution of various socio-economic characteristics of families that vacation in Minnesota and Wisconsin compared with those characteristics of all vacationers from midwestern states. (Shown by bars.)

Comparison of Minnesota and Wisconsin Tourists

Similarities and differences can be drawn from a comparison of the dotted line representing Wisconsin vacationers on each chart in Figure 5 with the solid line representing Minnesota vacationers. In general, the comparisons suggest the following: (1) Wisconsin attracts a larger percentage of families whose homemaker is under forty and a smaller percentage of families whose homemaker is over forty-nine than does Minnesota. (2) Generally, Minnesota attracts fewer of the families headed by those in craftsman and professional-technical occupations than does Wisconsin, and Minnesota attracts more of those in most of the remaining occupations. (3) Minnesota and Wisconsin attract families of similar size. (4) Wisconsin attracts a significantly greater proportion of families with annual incomes over \$12,000--and a smaller proportion of families with annual incomes under \$7,000--than does Minnesota.

Comparison of Minnesota Tourists and the Midwestern Vacation Market

The shaded bars in Figure 5 represent the percentage distribution of the Midwestern families in the Multicard sample who take vacations. Thus, a comparison of the solid line representing the percentage distribution of Minnesota vacationers with the shaded bars highlights the areas in which the State has made an unusually high or low penetration of the Midwestern vacation market: (1) Minnesota has attracted an unusually high proportion of the families whose homemaker is under forty and, conversely, an unusually low proportion of those whose homemaker is over fifty. (2) Minnesota attracts an unusually low

percentage of families with annual incomes over \$12,000 and an unusually high percentage with incomes from \$4,000 to \$6,999.

With some minor exceptions, the profiles of the families vacationing in Minnesota are very similar to those of the Midwestern families that vacation with respect to the two other characteristics shown in Figure 5--occupation of the family head and size of the family.

#### Twin Cities Tourists

The Twin Cities Metropolitan Area to some extent is a "captive market" for recreation facilities in outstate Minnesota. Thus, this important market warrants special analysis. The telephone and personal interviews of the Twin Cities sample (households in Hennepin and Ramsey counties) are the source of information for this section.

#### Vacation Destinations

Twin Citians who vacationed during the summer of 1968 were asked where they took their "most important" vacation--in terms of the longest time spent away from home. About 55 per cent of those who took vacations did so in Minnesota. Of the remainder, about 10 per cent vacationed in Wisconsin, 10 per cent in the Dakotas, 10 per cent in some other Midwestern state or in southern Canada, and 15 per cent vacationed outside the areas covered.

Twin Citians who take vacations involving the whole family are more likely to stay in Minnesota for their vacation than leave it; about three Twin Cities families in four spend their most important vacation in the State. However, when couples vacation without children (either because they

have no children or they have them but don't take them along), only one couple in three spends their most important vacation in Minnesota. Although the sample of single adults was limited, they also tend to spend their most important vacation outside Minnesota.

The Twin Citians were also asked to estimate the number of vacations they had taken in each of the three Lake States during the past five years. This provides a measure of "brand allegiance" or "repeat purchase" among Twin Citians for their vacation choices. The results, summarized in Table 8, show that although Wisconsin has attracted many Twin Citians who vacation, Michigan generally has not. The table also emphasizes the importance of Twin Citians who have taken repeated vacations in Minnesota during the past five years: one third of the respondents took six or more vacations in Minnesota during the past five years; these respondents also took about two thirds of all Minnesota vacations taken by Twin Citians.

#### Length of Stay and Vacation Purpose

Table 9 shows that about five eighths of the Twin Cities sample that took their most important vacation in Minnesota spent six or more days on the vacation. However, only about one in ten spent twelve or more days on his Minnesota vacation. Comparison of Minnesota vacations with those taken outside the State show that long vacations (of twelve or more days) are frequently taken outside the State, whereas two of every three shorter vacations (of less than a week's duration) are taken within the State. Table 10 relates the principal purpose of the vacation to where it was taken--whether inside or outside Minnesota. In this survey respondents were permitted to give simply

TABLE 8  
NUMBER OF TIMES TWIN CITIANS VACATIONED  
IN EACH OF THE LAKE STATES DURING  
THE PAST FIVE YEARS

Number of Vacations Taken	Lake State		
	Minnesota	Wisconsin	Michigan
None . . . . .	5%	45%	75%
1 or 2 . . . . .	24	34	18
3 to 5 . . . . .	39	11	7
6 to 10 . . . . .	11	5	0
11 to 15 . . . . .	6	2	0
16 or more . . . . .	15	3	0
Total	100%	100%	100%

Source: Twin Cities sample.

TABLE 9

LENGTH OF TWIN CITIANS' STAY ON THEIR MOST IMPORTANT VACATION

Length of Stay	Destination		Total
	Minnesota	Outside Minnesota	
1 to 2 days . . . . .	4%	0%	4%
3 to 5 days . . . . .	17	10	27
6 to 8 days . . . . .	27	17	44
9 to 11 days . . . . .	3	4	7
12 or more days . . . . .	5	13	18
Total	56%	44%	100%

Source: Twin Cities sample.

TABLE 10

PRINCIPAL PURPOSE OF TWIN CITIANS' MOST IMPORTANT VACATION

Principal Purpose	Destination		Total
	Minnesota	Outside Minnesota	
Rest and relaxation . . . . .	42%	15%	57%
Visit friends or relatives . . .	13	19	32
Fishing and water activities . .	37	5	42
Camping . . . . .	8	3	11
Sightseeing . . . . .	3	18	21
Visit own cottage . . . . .	3	2	5
Other . . . . .	4	7	11
Total	110% <sup>a</sup>	69%	179% <sup>a</sup>

Source: Twin Cities sample.

<sup>a</sup>Multiple answers result in a total percentage greater than 100 per cent.

"rest and relaxation" as a principal purpose, and many did. The important points, however, are those mentioned earlier in dealing with the Midwestern Multicard sample: like the Multicard sample, Twin Citians spend their lake-related vacations (fishing and water sports) in Minnesota but go outside the State for sightseeing.

### Conclusions

The principal conclusions from the section are listed below.

- Among the Midwestern families that take vacations:
  1. About one fourth of all the families take five eighths of all the vacations.
  2. Over half of all vacationing families have annual incomes exceeding \$9,000, and they take more than two thirds of the vacations.
  3. The largest vacation market is among families whose breadwinner is a craftsman or foreman--about 1.8 million families. However, (a) professional and technical occupations and (b) managers, officials, and proprietors--each group with about 1.5 million vacationing families--have a higher proportion of vacationing families within their group.
- In terms of the home states of Minnesota vacationers:
  1. Minnesota sends about 40 to 45 per cent.
  2. Iowa and Illinois together contribute about 25 per cent.
  3. Collectively, Minnesota's neighbors on the east and west--Wisconsin and the Dakotas--send about 15 per cent.

4. Nebraska, Kansas, and Missouri collectively contribute about 10 per cent.
- A principal purpose for about 40 per cent of Minnesota vacationers is to visit friends and relatives--a purpose that cannot easily be exploited by the State to attract more vacationers. About 30 per cent of Minnesota vacationers come here primarily to fish or participate in other water activities; another 10 per cent come to camp. Sightseeing is not Minnesota vacationers' principal purpose in coming here; they go to other states or to foreign countries to do most of their sightseeing.
- About half of the Minnesota vacationers stay more than six days; about a fourth stay ten days or more. About two thirds of the fishing vacations and half of the camping vacations in Minnesota are six days or longer.
- In competing for the market of Midwestern families that vacation:
  1. Minnesota attracts an unusually low proportion of families that (a) have homemakers over forty-nine years of age and (b) have incomes in excess of \$12,000.
  2. Wisconsin has been able to attract a significantly larger proportion of the families with annual incomes over \$12,000 than has Minnesota.
- Twin Citians have a strong allegiance to their home state for their most important vacation during the year:

1. About 55 per cent of Twin Cities vacationers spent their most important vacation in Minnesota.
2. Vacations spent in the State are more likely to include the whole family and to involve fishing or water sports. Those taken outside the State often do not include children. Twin Cities vacationers more often go outside the State for sight-seeing than remain here.
3. In viewing their vacations over the past five years, the one third of the respondents who typically vacationed in Minnesota took about two thirds of all vacations taken by Twin Citians within Minnesota.

## 5. HOW VACATION DECISIONS ARE MADE

To promote vacationing in Minnesota more effectively, it is important to answer several important questions:

- What role do various family members have in making vacation decisions?
- What sources of information are used that influence the vacation decision?
- What are the important factors that affect where an individual wants to go on his vacation?
- How are vacation plans and reservations made, and what changes occur in them?

Answers to these questions will assist Minnesota in planning both what and when to advertise. Because much of the information for answers must come from intensive questioning of vacationers themselves, the principal sources of data in the section are the telephone and personal interviews of the Twin Cities sample. In addition, the section discusses two related points: (1) the usefulness of vacation information mailed by the State of Minnesota to inquirers, and (2) the relative appeal of four vacation concepts developed with the State's assistance. The principal sources of information used to discuss these two topics are the Coupon sample and the Midwestern sample, respectively.

Role of Various Family Members  
in Vacation Decisions

Results of Previous Studies

Prior research generally indicates that vacation decisions are largely joint decisions involving the husband and wife or whole family. This is especially true in deciding where to vacation [6] , and, to a lesser degree, true, of deciding when to vacation. The husband has greater influence in deciding when to vacation, presumably since his vacation schedule is determined by his place of employment.

According to one study [8] , the wife is likely to start the discussion about vacationing and also collects information about alternative destinations, but the husband retains veto power over where the family will travel and how long they will be gone.

Results of Present Study

Although the data gathered in this study generally confirm the results of earlier research, the role of the husband in vacation decisions appears to be more important than previously suggested (see Tables 11 and 12).

When asked who had the most to do with deciding when and where to go, Twin Citians answered "husband" in 55 and 36 per cent of the cases, respectively. In most other cases, the decision was either a joint one, made by the husband and wife or the whole family, or it was influenced by others, such as relatives or friends. The wife is rarely most important in deciding either when or where to go, although she does play a more important role in first

TABLE 11

MEMBER WHO HAD THE MOST INFLUENCE ON TWIN CITIES  
FAMILIES' DECISIONS TO VACATION IN  
MINNESOTA OR WISCONSIN

Family Member	First Had Vacation Idea	Did Most of Deciding Where to Go	Did Most of Deciding When to Go
Husband and wife or whole family . . . . .	26%	36%	10%
Husband only . . . . .	40	36	55
Wife only . . . . .	10	3	2
Other (including friends/relatives) . .	24	25	33
Total	100%	100%	100%

Source: Twin Cities sample, personal interviews.

TABLE 12

MEMBER WHO HAD THE MOST INFLUENCE IN  
MIDWESTERN FAMILIES' DECISION TO  
VACATION IN MINNESOTA OR WISCONSIN

Family Member	Minnesota Vacationers			Wisconsin Vacationers		
	Minnesota Residents	Other Midwesterners	Total	Wisconsin Residents	Other Midwesterners	Total
Husband and wife or whole family	52%	45%	48%	54%	48%	50%
Husband only . .	32	33	32	34	27	29
Wife only . . . .	10	12	11	4	12	9
Other (including friends/rela- tives) . . . . .	6	10	9	8	13	12
Total	100%	100%	100%	100%	100%	100%

Source: Midwestern sample.

bringing up the vacation idea.

The choice of destination state is nevertheless very much of a joint husband-wife decision. Obviously, in promoting its vacation opportunities, Minnesota has to sell the wife as well as the husband, even though the primary vacationing activity of the family may be male-oriented (such as fishing).

#### Sources of Influence on Vacation Decisions

##### Importance of Previous Visits and Advice of Others

In his 1958 study on Minnesota vacationing, Sielaff [24] reported that the most important reason people give for vacationing where they did is that they had been there before. Excluding repeat vacations as a reason, however, reveals that the great majority report that the advice of friends or relatives is important [28] .

This is confirmed by data in Table 13. Most respondents said their own vacations in the same place before were the most important source of information, and advice of friends or relatives was the second most important source. Advertising and promotional literature sent by resorts accounts for most of the rest. It should be noted that advice of friends or relatives assumes more importance among non-Minnesotan Midwesterners than among Minnesotans who vacationed in Minnesota last summer.

Table 14 shows that friends and relatives also exert an important influence on Twin Citians' vacation destinations. Twin Citians vacationed in Minnesota chiefly because of the advice of friends and relatives or in order to visit friends or relatives, if one excludes "had been there before."

TABLE 13  
 MOST IMPORTANT SOURCE OF INFORMATION USED IN  
 PLANNING MINNESOTA VACATION

Source of Information	Minnesota Residents	Other Midwesterners
Had been there before . . . . .	55%	43%
Advice of friends/relatives . . . . .	25	32
Other . . . . .	20	25
Total	100%	100%

Source: Midwestern sample.

TABLE 14  
 INFLUENCES ON VACATION DECISIONS MADE  
 BY TWIN CITIES FAMILIES

Influence	Minnesota Destination	Destination outside Minnesota	Total
Visit friends/relatives . . . . .	22%	35%	28%
Had been there before . . . . .	28	26	27
Own property/cottage . . . . .	20	15	13
Advice of friends/relatives . . . . .	13	19	11 <sup>a</sup>
Had never been there before . . . . .	9	7	8
Other . . . . .	8	18	13
Total	100%	100%	100%

Source: Twin Cities sample, telephone interviews.

<sup>a</sup>The families mentioning friends or relatives as the source of information estimated that the source of the friend's or relative's information was: had been there before, 71 per cent; heard from others, 3 per cent; other reasons, 26 per cent.

Furthermore, the single most important reason Twin Citians vacationed out of state was to visit friends and relatives.

These findings suggest the importance of selling Minnesota as a vacation state to Minnesotans, even if they themselves are not vacationers. A Midwesterner who is deciding among alternative destinations is clearly influenced by his friends and relatives who reside in Minnesota. Although the State cannot do anything about increasing the number of friends and relatives Midwesterners have here, it is possible to make salesmen out of Minnesota residents.

#### Exploiting Word-of-Mouth Advertising

In support of this emphasis on follow-up are answers given by Twin Citians in early September to the question, "Have you talked to anyone about your vacation since you returned home? If so, to whom?" Over half the respondents had talked to others--74 per cent to friends and 42 per cent to relatives. Most of these Twin Citians had returned from their summer vacations less than a month before. Certainly, the influence of word-of-mouth advertising on vacation decisions cannot be overemphasized, and should be deliberately exploited by the State.

This might be accomplished in several ways. All persons who apply for fishing, hunting, or other sporting licenses, or who pay a fee for the use of State parks or camping facilities, might be sent a note saying "thank you and come again" in the early fall. License numbers could be taken from all those who stop at tourist information centers, addresses obtained, and follow-up letters sent. Resorters, outfitters, hotel-motel

managers, and others who encounter vacationers should be urged to follow-up each by mail, particularly those who come from out-of-state. A second follow-up would seem appropriate in the spring when most people who vacation in Minnesota make their vacation decisions.

#### Important Factors Affecting Where to Vacation

To find out what factors are important in their deciding where to go on vacation, Twin Citians were asked to answer two questions in their own words: (1) "What are some of the things that are really important to you in deciding about where you go on vacations?" and (2) "What are some of the things that are really important to you in deciding whether or not you would go back to a vacation place for a future vacation?" Their answers to the first question are summarized in Figure 6.

The five most important factors were:

1. Sightseeing
2. Outdoor activities
3. Cost considerations
4. Adequacy of facilities
5. Variety of activities

Note, however, that Twin Citians who vacationed outside Minnesota rate sightseeing, rest-relaxation, visiting relatives, and entertainment-nightlife as more important than do Twin Citians who vacationed in the State. It is not surprising that Twin Citians go out of state to visit relatives, since this information is consistent with that mentioned in Section 4. Unfortunately,

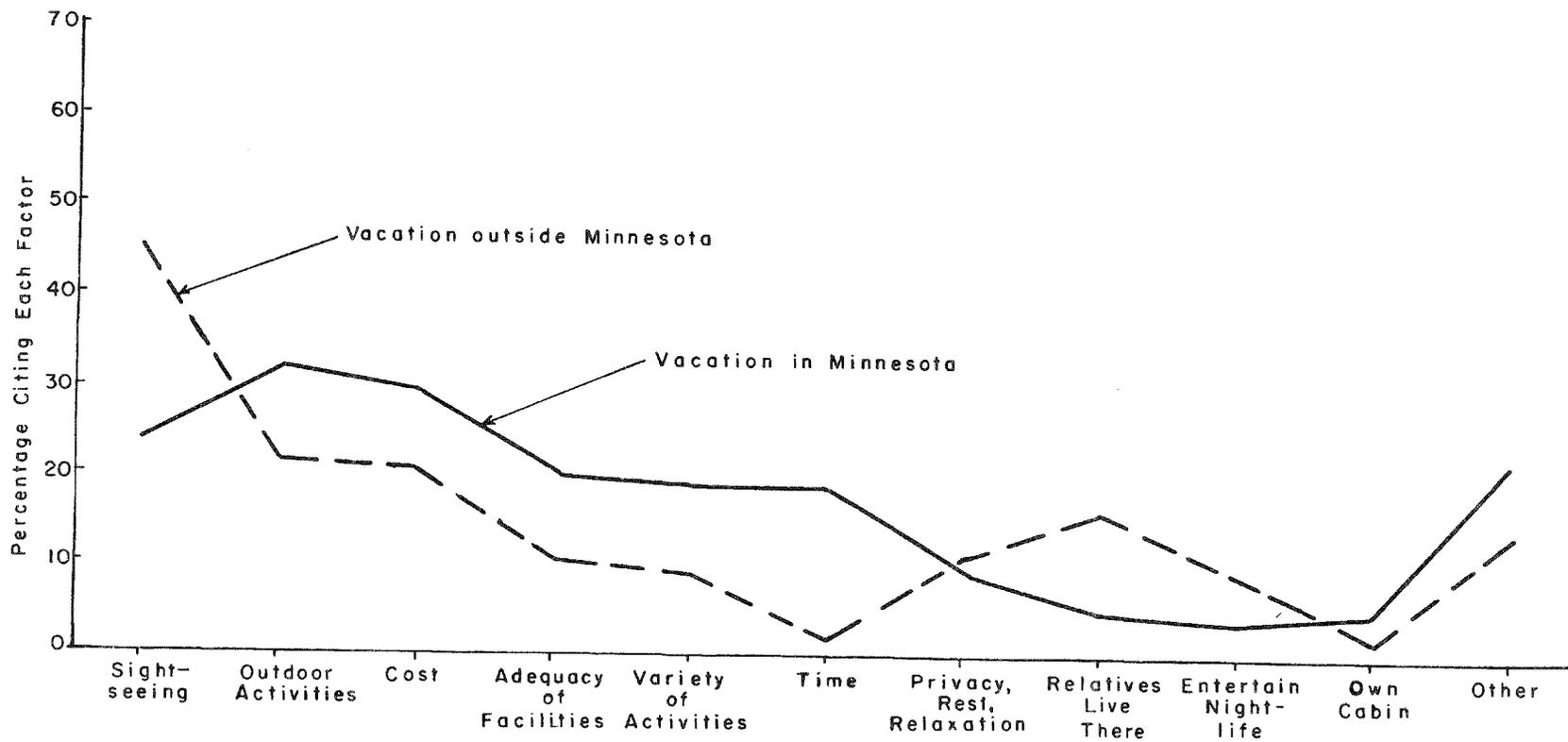


Fig.6-Factors in families decisions about where to vacation.

the finding is not actionable: Minnesota can do very little to keep its residents from visiting friends or relatives who live in another state. However, the sightseeing and entertainment-nightlife factors may suggest deficiencies, which, if improved, might encourage some Twin Citians now vacationing elsewhere to spend more vacation dollars in Minnesota.

Whether one returns to a vacation place for a future vacation seems to be mainly a function of four factors--sightseeing, outdoor activities, adequacy of facilities, and friendliness of people. Those Twin Citians vacationing in Minnesota decide to return to a place if it provided satisfactory outdoor activity, whereas those who vacationed elsewhere last summer place most importance on sightseeing. It is thus important to take account of what other activities appeal to those whose chief vacation interest is sightseeing. Some of these are "variety of activities," "entertainment, night life," and "historic sites"--which, taken together, might be very much a definition of sightseeing. To the extent that Minnesota does not offer a variety of things to do, including nightlife, entertainment, and historic sites, it will not satisfy vacationers who rate sightseeing as important.

#### Timing of Vacation Decisions and Actions

Also of interest for promotional purposes is the timing of three steps in the vacationing sequence: (1) starting the planning of the vacation, (2) making the decisions on both the state and the specific location in which to vacation, as well as making reservations, and (3) leaving for the vacation site. The following discussion, based on the information summarized in

Tables 15 and 16 and Figure 7, covers these three vacationing stages for the principal summer vacation taken.

#### Planning the Vacation

It is clear that the spring months (especially June) are the most frequent planning months for summer vacations. Thus, during April, May and June 55 per cent of the Twin Citians and 43 per cent of the non-Minnesota Midwesterners sampled began planning their summer vacation. However, it is also important to note that one quarter of the non-Minnesotan Midwesterners who vacationed in Minnesota last summer had decided on their destination state before the end of January, and on the other hand, over one fifth were "late planners" who did not start their planning until after the beginning of July. About one tenth of Twin Citians who vacationed in the Lake States began planning before the first of the year; many of these probably made plans and reservations for the following year at the same facility at the time they completed their summer vacation.

These findings suggest that the traditional heavy concentration of advertising in February through April is missing the most important planning period, especially in the Twin City area. Only about one fifth of the Midwesterners are actually planning their Minnesota vacation during this period.

#### Making Reservations and Deciding Where to Go

About two thirds of the Twin Citians who vacationed last summer made reservations for accommodations at or en route to their vacation destination. As might be expected, they were more likely to make reservations if they

TABLE 15

TIME OF PLANNING MOST IMPORTANT SUMMER VACATION IN 1968

Time Period	Began Planning <sup>a</sup>		Decided on Destination State <sup>b</sup>		Decided on Specific Location <sup>b</sup>	
	%	Cum. %	%	Cum. %	%	Cum. %
1967 or before . .	11%	11%	17%	17%	17%	17%
January, 1968 . .	3	14	8	25	5	22
February, 1968 . .	3	17	6	31	5	27
March, 1968 . . .	11	28	4	35	2	29
April, 1968 . . .	7	35	10	45	8	37
May, 1968 . . . .	23	58	11	56	12	49
June, 1968 . . . .	25	83	22	78	24	73
July, 1968	15	98	14	92	18	91
After July, 1968 .	2 <sup>c</sup>	100	8	100	9	100
Total	100%	100%	100%	100%	100%	100%

<sup>a</sup>Twin Citians who vacationed in Lake States; data obtained from the Twin Cities sample, personal interviews.

<sup>b</sup>Non-Minnesotan Midwesterners who vacationed in Minnesota; data obtained from the Midwestern sample.

<sup>c</sup>Twin Cities personal interviews were conducted in mid-September, whereas the mail interview ("Minnesotans" and "Non-Minnesotan Midwesterners") was conducted several weeks later. Therefore, the per cent indicating "most important vacation taken in September" is somewhat underestimated for the Twin Cities sample.

TABLE 16

DATE OF DEPARTURE FOR MOST IMPORTANT  
MINNESOTA SUMMER VACATION IN 1968

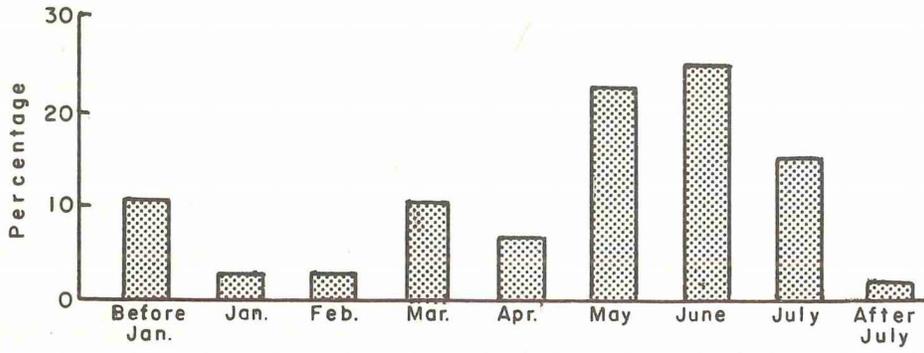
Time Period	Twin Citians		Minnesotans		Other Midwesterners	
	%	Cum. %	%	Cum. %	%	Cum. %
June 1-15 . . . . .		2				
June 16-30 . . . . .		11				
<u>June</u> total . . . . .	11	11	17	17	19	19
July 1-15 . . . . .		54				
July 16-31 . . . . .		70				
<u>July</u> total . . . . .	59	70	35	52	36	55
August 1-15 . . . . .		84				
August 16-31 . . . . .		98				
<u>August</u> total . . . . .	28	98	38	90	35	90
September . . . . .	2 <sup>a</sup>	100	10	100	10	100
	100		100		100	

Sources:

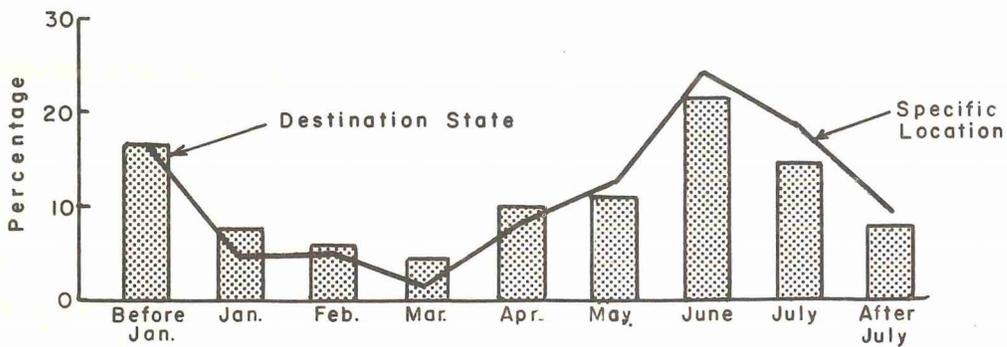
<sup>a</sup> Twin Cities sample, personal interviews.

<sup>b</sup> Midwestern sample.

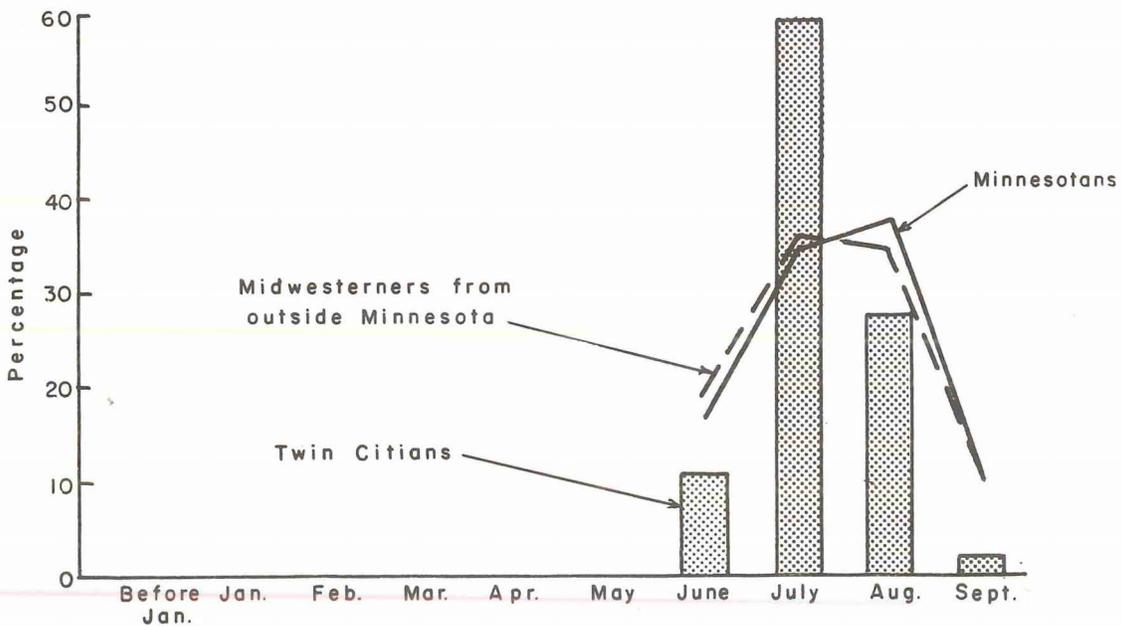
<sup>c</sup> Twin Cities personal interviews were conducted in mid-September, whereas the mail interview ("Minnesotans" and "Non-Minnesotan Midwesterners") was conducted several weeks later. Therefore, the percent indicating "most important vacation taken in September" is somewhat underestimated for the Twin Cities sample.



When Twin Citians who vacationed in the Lake States in 1968 began planning.



When Midwesterners from outside Minnesota who vacationed in Minnesota in 1968 selected their destination.



When departure is made for summer vacation in Minnesota

Fig. 7-Timing of three important steps in the vacationing sequence.

traveled out of state for their vacation than if they stayed in Minnesota. About half the reservations were made directly (writing, telephoning, wiring) with the specific destination, about one fifth were made by a travel agency, and about one eighth were made through the American Automobile Association.

The ability to make reservations is very important in determining whether or not the vacation takes place as planned. Of those making reservations, 70 per cent said their vacation plans would have changed if they had not been able to make reservations. Over half of vacationing Twin Citians making reservations reported that they were made in the same month as planning began; within six weeks of the time they began planning, over four fifths had made reservations. Clearly, since planning and making reservations occur at about the same time for most vacationers, it would seem important to make available to the vacationer a specific list of destination facilities at the time when he is most likely to be planning his vacation. This is especially important because about 40 per cent of those making reservations did so within a month of their departure date.

The preceding discussion dealt with reservations made by Twin Citians. In addition, as shown in the middle portion of Figure 6, Midwesterners from outside Minnesota who came here to vacation were asked when they decided on their (1) destination state and (2) specific location. Even among these more distant Minnesota vacationers, about two thirds make these two critical vacation decisions after March of the year in which they take a summer vacation.

### Leaving on Vacation

Table 16 and the lower portion of Figure 7 provide information on when various groups sampled in the study left for their "most important Minnesota summer vacation." Among Minnesotans generally, as well as among Midwesterners from outside Minnesota, about 35 to 40 per cent of the vacations start in July or August, about one sixth start in June, and about one tenth in September. The striking characteristic of Twin Citians vacationing in Minnesota is that almost 60 per cent started in July. The additional detail in Table 16 shows that most of these vacations were started in the first half of July--the period that includes the long July 4 weekend, which represented a four-day vacation in 1968 if one took off work July 5, a Friday.

### Changes in Vacation Plans

The way in which vacationing information was obtained from the Twin Cities sample provided a unique opportunity to learn about reasons for changes in vacationing behavior between what was planned and what actually happened. Telephone interview information gathered in late June ("What do you plan to do?") was compared with the personal interview information gathered in mid-September ("What did you actually do?") in order to learn how and why plans changed. Knowledge of these reasons may point to specific ways in which the State can take advantage of such changes to increase vacationing in Minnesota.

Personal interviews were conducted with 129 of the respondents who

had been interviewed earlier on the telephone. All of these persons said in late June that they intended to vacation during the summer of 1968, but only 100 of these 129 persons (78 per cent) actually took a vacation. Those who stayed home most frequently did so from lack of time--usually owing to inability to take time off from employment (17 per cent). Accidents and illnesses accounted for about 14 per cent, and about the same number said that others (friends, relatives) came to their home for the vacation, whereas the original plan was for the Twin Citian to visit them.

Among the 100 Twin Citians who did vacation, it is interesting to note that only 26 per cent actually did exactly what they had planned to do --the other 74 per cent changed their plans. These changes fell into four main categories:

Changes in the number of days spent away from home: Of the vacationers, 58 per cent spent a different number of days on vacation than they had planned to. On the average, they spent about 10 per cent fewer days than they had planned, but it should be noted that about one third spent more days away than they had planned. Those who spent fewer days often did so because of bad weather, bad fishing luck, or shortage of money. Those who spent more days often said the main reason was that they were having so much fun that they hated to go home.

Changes in the composition of the vacationing unit: There were differences in who in the family actually went on vacation, as compared with

who planned to go, in 20 per cent of the households. In the main, fewer people than planned from each household went on vacation. Often, illness in the family kept one or more of the children at home, and, in many of these cases, the wife then stayed home too.

Changes in date left: In all, 38 per cent of Twin Citians who vacationed left at different times than originally planned. Most left later than planned--usually because of job-related delays.

Changes in destination state: Changes in destination state for the most important vacation occurred among 19 per cent of the vacationing Twin Citians. Interestingly, this is largely accounted for by Twin Citians who had planned to vacation in other states but who ended up vacationing in Minnesota.

Since at least 10 per cent of Twin Citians end up vacationing in Minnesota who, earlier in the summer, had planned to vacation elsewhere, it might be a fair assumption that many of them had to make last-minute decisions about where they would go in Minnesota for their substitute vacation. The State and private resorters, anticipating these "unexpected" tourists, might profit by planning special promotions for facilities in pre-weekend advertisements in the metropolitan newspapers.

Vacation Information Sent by  
Minnesota to Coupon Mailers

The Coupon sample of 307 respondents (85 per cent of whom resided outside of Minnesota) returned a one-page questionnaire sent to 1,000 persons

who had sent in a magazine coupon requesting that tourist information be mailed them by Minnesota.

Table 17 summarizes the usefulness of this information to respondents of various ages. Only 9 per cent of the respondents said the information was "not very useful," but most of those who said this were between the ages of 21 and 49, a very important vacationing segment. Furthermore, fewer of those saying "not very useful," vacation in Minnesota, than those who said "very useful." Thus, perceived usefulness of information appears to be important in deciding among alternative destination states.<sup>1</sup>

When asked if the State could have sent additional materials that would have been helpful, one third of the respondents said yes; of these, one third said they would have liked more specific information about hotel, motel, and resort accommodations. The others said they wanted more information about lakes and fishing (18 per cent), camping (16 per cent), and sightseeing (14 per cent)--for example, museums, State Parks, and so forth.

Potential Minnesota vacationers apparently rely quite heavily on the information sent by the State as a primary source of information in planning their vacation. Only 17 per cent of the respondents said they also wrote to individual vacation facilities (resorts, hotels, and others) for additional

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<sup>1</sup>Although a deliberate attempt was made to eliminate younger respondents from the Coupon sample, 15 per cent of the respondents shown in Table 17 are under 21. Many grade school and high school students request the State's information to obtain material for school assignments. Making the State's direct-mail material more informative about vacation accommodations would probably reduce the demand by students.

TABLE 17

USEFULNESS OF INFORMATION SENT BY STATE OF MINNESOTA<sup>a</sup>

Age	Very Useful		Useful		Not Very Useful		Did Not Receive		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%
12 or under . . .	7	70	3	30	0	0	0	0	10	100
13-20 . . .	9	26	23	68	1	3	1	3	34	100
21-34 . . .	22	25	54	61	11	12	2	2	89	100
35-49 . . .	29	36	39	48	10	12	3	4	81	100
50-64 . . .	24	44	25	46	2	4	3	6	54	100
65 or over . . .	7	35	11	55	1	5	1	5	20	100
Total	98	34	155	54	25	9	10	3	288 <sup>b</sup>	100

Source: Coupon sample.

<sup>a</sup> All in the coupon sample returning questionnaire, whether they vacationed in Minnesota or not.

<sup>b</sup> Only 288 of the 307 respondents answered this question.

information, yet 44 per cent of the total group did take a summer, 1968, vacation in Minnesota. Thus, most had just the State's information to aid them.

It may be of interest to note that those people who did send for and receive (some 3 per cent said they did not receive) information from individual vacation facilities found that information to be more useful than the information sent by the State. But even here, one fifth said that additional information (about facilities, prices, activities, adjoining areas) should have been sent.

Many people who asked for additional information wrote to specific resorts (40 per cent), to a Chamber of Commerce (34 per cent), and to travel associations (11 per cent). Only one person wrote to a Tourist Information Center, which suggests inadequate consumer awareness of the role of the Tourist Information Center, particularly in providing specific regional information. This implies that efforts should be directed at making potential vacationers more aware of the existence of the regional Tourist Information Centers.

Table 18 summarizes the vacationing behavior of the Coupon sample, and it is here that the critical nature of the quality of information the State sends becomes apparent. Of the people who wrote for information, 8 per cent said they did not vacation in Minnesota because the information sent either was insufficient or was of less interest than information sent by competing states.

In summary, the kind of information the State sends in response to

TABLE 18  
 VACATIONING BEHAVIOR OF PERSONS  
 REQUESTING TOURIST INFORMATION

Specific Questions and Answers	%
Did you vacation in Minnesota between 5-1-68 and 9-10-68?	
Yes . . . . .	44
No . . . . .	56
In what states did you vacation? <sup>a</sup>	
None . . . . .	40
Wisconsin . . . . .	14
Michigan . . . . .	8
Missouri . . . . .	5
Illinois . . . . .	3
Indiana . . . . .	3
South Dakota . . . . .	2
Southern Canada . . . . .	2
Other . . . . .	23
Total . . . . .	100
Why didn't you vacation in Minnesota?	
Prior commitments . . . . .	10
Unforeseen problems (illness, car trouble) . . . . .	9
Insufficient information sent by Minnesota, or information sent by other states more interesting . . . . .	8
Not enough time . . . . .	8
Couldn't afford it . . . . .	6
Other . . . . .	33
No answer . . . . .	26
Total . . . . .	100

Source: Coupon sample.

<sup>a</sup>Excludes the 44 per cent of the respondents who vacationed in Minnesota.

coupon inquiries is important. Almost half of those who receive Minnesota information do vacation in the State, and those who find the materials "not very useful" are not so likely to vacation here as those who find them useful. Finally, our vacationing information should contain more specific information about facilities, activities, and prices.

#### Relative Appeal of Four Vacation Concepts

How interested would families be in various vacation packages which presumably could be offered by Minnesota to potential tourists? In discussion with State tourism officials, four vacation "concepts" were developed which were felt to be of sufficient interest to warrant evaluation in this study. A description of these concepts, as they were actually presented to respondents, appears in Table 19, and various respondent groups' evaluations of these ideas are illustrated in Figure 8.

The Farm Vacation does not generate interest in any group, but all the other three are rated "somewhat appealing." Wives are somewhat more interested in the Twin Cities Package than in the Minnesota Historical-Cultural Tour, and the reverse is true of the husbands. Winter Wonderland is of more interest to Minnesota residents than to non-Minnesotans.

However, the differential appeal of these concepts appears more clearly when the evaluations are analyzed by demographic subgroups:

Minnesota Historical-Cultural Tour: Interest in this concept is relatively higher among older families (housewife over 40) in the middle-income category (\$7,000 to 12,000 per year) than in any other demographic group.

TABLE 19  
DESCRIPTION OF FOUR VACATION CONCEPTS

Concept	Description
1	<p>A guided tour through northern Minnesota, with emphasis on places of historical and cultural interest. You would provide your own transportation to the Twin Cities; there you would join other vacationing families for your trip North. You'd travel by "minibus" (driven by a trained guide), with a small, friendly group.</p> <p>You would visit one of Minnesota's iron-mining operations, learning about this industry during your own escorted tour of the mine. In Duluth, you'd travel one of Minnesota's most scenic highways, the Sky-line Drive, explore the port, and tour the harbor. Afterwards, you'd have a chance to visit colorful Indian reservations, and discover historical points of interest, like the Kensington Runestone, trading posts, early missions, and sites of Indian battlegrounds. You and your family would spend your nights in comfortable motels or resorts.</p>
2	<p>A vacation package in the Twin Cities for the whole family, with accommodations at one of the Cities' fine hotels or motels. Tickets for a Twins baseball game, or perhaps seats at the Guthrie Theatre. Visits to any or all of the Cities' cultural attractions: the Minneapolis Art Institute, Walker Art Center, the Library Planetarium, the St. Paul Arts and Science Museum, and the Minnesota Museum of Natural History on the University campus. A family fun night at the famous Aquatennial, or a day spent at Minnehaha Falls. Como Park Zoo and Excelsior Amusement Park for the kids, and -- for you -- shopping on the Mall.</p>
3	<p>A farm vacation for the whole family. Visit a rural family in Minnesota and learn about life and work in the country. Dairy cattle, horses, and other livestock abound; the kids can learn firsthand how cows are milked, eggs gathered, sheep sheared, etc. Ride tractors and combines with the farmer out in the fields. Horseback riding, hayrides, fishing -- and then plenty of relaxation, and lots of real home cooking.</p>
4	<p>A winter wonderland vacation for the family, with or without the kids, at one of northern Minnesota's plush ski resorts. Skiing, sledding, snow-mobiling, snow-shoeing, and ice-skating facilities, or even an occasional old fashioned sleigh ride in a setting of snow covered pine and birch. To warm up a little, swimming in heated indoor pools, sauna baths, shuffleboard, and other indoor recreation are also available. Even the non-skier will have busy, fun-filled days. At night you have your choice of after-ski lounges, dining, dancing, and entertainment at the resort or in nearby communities. In addition to an option of American or European plans, your vacation package includes free rental of all sports equipment, tow tickets, ski lessons -- if you wish -- from one of Minnesota's many pros, and access to all other recreational facilities.</p>

Source: Questionnaire used in Midwestern and Twin Cities samples.

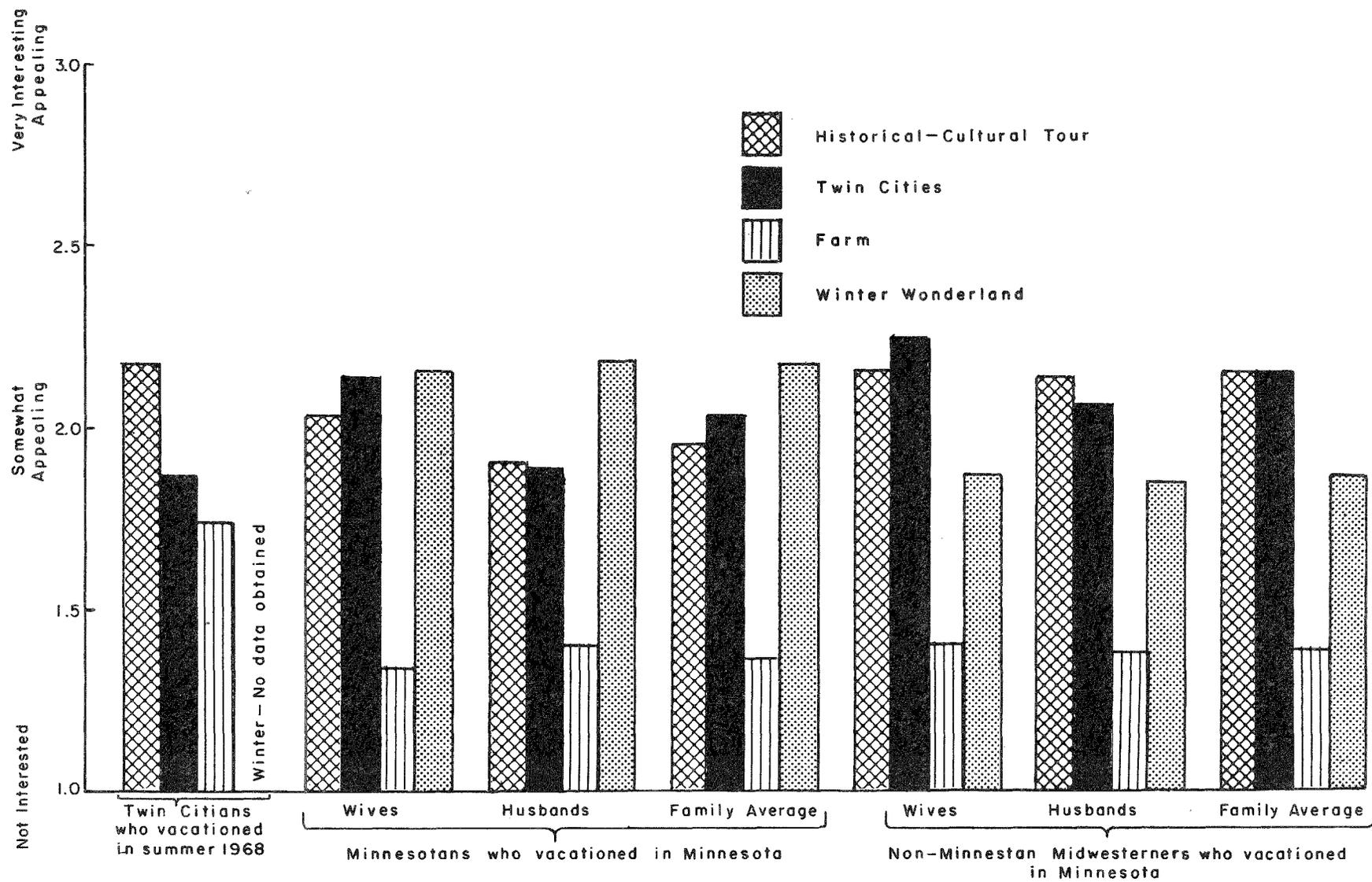


Fig. 8 The relative appeal of four vacation concepts.\*

\* Complete descriptions shown in Table 19

Twin Cities Package: The greatest interest in this concept is shown by the high income (over \$12,000 per year) group.

Farm Vacation: Although interest in this concept is quite low among all demographic segments, the most interest is among younger families (husband under 45). Older families are not interested at all. This may be partly explained by the fact that older families are more likely to live (or to have lived) in a rural area than younger families, and hence would not be curious about farm life.

Winter Wonderland: It is with this concept that the clearest segmentation appears. Two factors are important here--age, and the presence or absence of preschool children. The families most interested in this concept are (1) young marrieds, (husband under 29), whether or not there are children, and (2) middle-aged marrieds (husband 29 to 44 years old), provided there are no preschool children. There is a slight income bias here too--the very highest income group (over \$12,000 per year) is more interested in this concept than are the less well-to-do.

#### Conclusions

The principal conclusions for the section are summarized below:

- Among Midwestern families who vacation in the Lake States, the husband is more important than the wife in deciding when to vacation, but the decision about where to vacation is either a joint (husband and wife) decision or the husband's decision. In neither

case is the wife alone very important in decision-making.

- The influence of friends and relatives is very important in determining where Midwesterners vacation. Recommendations are made for taking advantage of word-of-mouth advertising in promoting Minnesota as a destination state.
- Among Twin Citians, deciding both where to go and whether to go back to a place for a summer vacation is very much dependent upon the sightseeing opportunities in that area. "Sightseeing" seems to mean entertainment, nightlife, a variety of activities, and historic sites--things to do and see. Twin Citians, who rate sightseeing as very important in their vacationing, often go to another Lake State, rather than vacation in Minnesota.
- The spring months (April-June) are the most common months for planning summer vacations, although about one fourth plan before the end of January, and another one fifth are late planners (after July 1). About two thirds of the Twin Citians make reservations, and of these, 80 per cent do so within six weeks of the beginning of planning. The promotion schedule should be coordinated with these planning periods.
- Vacationing plans are very likely to change. Many who plan to leave Minnesota for their vacation end up vacationing within the State. In view of this, the State and private resorters may profit from a local promotional effort continued through the summer months.

- Most people who requested and received Minnesota tourism information found it at least "somewhat useful," but it could be improved by including more specific information. The quality of this information would seem to be of considerable concern to the State since almost half of those receiving it did vacation in Minnesota, and those rating it "not very useful" were less likely to vacation here.
- Four Minnesota vacation concepts were evaluated by Midwesterners. Both the Twin Cities Package and the Minnesota Historical-Cultural Tour were appealing; the wives were more interested in the former, and the husbands in the latter. The Winter Wonderland vacation is particularly attractive to younger families with no preschool children. The Farm Vacation is not appealing.

## 6. FAVORABLE AND UNFAVORABLE ASPECTS OF MINNESOTA VACATIONS

A primary purpose of this study was to assess the favorable and unfavorable aspects of vacations in Minnesota and to make specific actionable recommendations for product improvement and promotion. The image of a "Minnesota vacation" is not restricted just to those who have vacationed in Minnesota--those Midwesterners who do not vacation here also have an image of the state that affects their choice of a vacation area. Of special interest was Minnesota's vacation image among three groups:

- Twin Citians who vacation in the Lake States.
- Midwesterners who vacation in Minnesota or Wisconsin--Minnesota's chief vacation rival--or both.
- Midwesterners who vacation somewhere in the Midwest outside the Lake States and represent a target market for Minnesota. This group was defined earlier as the Target sample.

Information from these groups will permit Minnesota to assess its strong and weak points and their importance in attracting vacationers.. Note that these strong and weak points are based upon what consumers perceive to be true about vacationing in Minnesota, and not necessarily upon actual strong and weak points. For example, although consumers may say that the cost of camping overnight in Minnesota is more reasonable than in Wisconsin, this may not, in fact, be true. But, after all, it is what consumers believe to be true that influences their vacationing decisions.

### Background Information

The investigators used several sources of information to gather image attributes that might be assessed in this study. Visits were made in June and July, 1968, to various tourist information bureaus and resort locations throughout the State (at least two or three in each Minnesota vacation region), where tourism personnel, information center managers, and vacationers themselves were interviewed. Earlier studies of vacationing in Minnesota, or studies in which Minnesota was included as a vacationing state, were reviewed, and several meetings were held with State tourism personnel to elicit their ideas. A basic list of nineteen image attributes was generated from these sources, and respondents in both the Twin Cities sample and the Midwestern sample evaluated these attributes. Additionally, respondents were asked to answer in their own words various questions about favorable and unfavorable experiences on Minnesota vacations, and they made recommendations for improving Minnesota's vacation product.

Prior studies generally agree that Minnesota's vacation image has two major aspects--(1) scenery (such as woods, and lakes) and (2) lake sports, fishing in particular [24, 28]. Although sightseeing is also important, Minnesota does not rate so well as Wisconsin on this attribute [12], perhaps because of the State's generally poorer ratings on "nightlife" and "variety of adult entertainment facilities." On the other hand, fishing in Minnesota is seen more favorably than fishing in Wisconsin.

Negative or unfavorable aspects of vacationing in Minnesota include (1) too many insects, (2) too few or poor quality of facilities at resort

lodges, and (3) too few or lack of variety in things to do and see. Naturally, each group has its own set of complaints--the fishermen want more fish; the large family resort group wants more things for the children to do at resorts; the canoeer, woodsman, and other back-to-nature vacationers complain about the "disappearing wilderness"; and so on.

But on the whole, the State's vacationing image is favorable, and with the possible exception of sightseeing and nightlife, Minnesota comes quite close to the "Dream Vacation Image" discussed in the 1966 Gallup study of vacationing [14] . The State's image problems, as its present advertising agency points out [8] , may not be "from dissatisfaction, but from lack of communication." We have a good product; we're either not selling it hard enough, or we're not selling it in quite the right way.

#### Minnesota's Vacation Image among Twin Citians

Twin Citians think that Minnesota is a good place to vacation, as demonstrated by the fact that of those in the sample who took vacations last summer, 56 per cent took their most important vacation in the State. And they were satisfied with this vacation--84 per cent said they planned to return to the same vacation spot some time in the future (see Table 20). Table 21 illustrates that Twin Citians are loyal vacationers: Of the sample, 95 per cent have vacationed in Minnesota at least once during the past five years. Furthermore, they go back to the same places--52 per cent of those whose most important vacation last summer was in Minnesota had vacationed at that particular location (campground, resort, and so forth) last summer also,

TABLE 20

TWIN CITIANS' PAST AND FUTURE VACATION DESTINATION STATES

Destination	Site of Most Important 1968 Vacation					
	Minnesota		Michigan or Wisconsin		Total	
	No.	%	No.	%	No.	%
<b>Vacationed there before</b>						
Yes	29	52	8	62	37	54
No	27	48	5	38	32	46
Total	56	100	13	100	69	100
<b>Vacations taken there before</b>						
One	5	17	2	25	7	19
Two	3	10	0	-	3	8
Three to six	4	14	3	38	7	19
Seven or more	17	59	3	37	20	54
Total	29	100	8	100	37	100
<b>Plan to return there</b>						
Yes	47	84	10	77	57	83
No	7	12	2	15	9	13
No answer	2	4	1	8	3	4
Total	56	100	13	100	69	100
<b>Destination for vacation of summer, 1969</b>						
Minnesota	33	59	13	30	46	46
Other	38	68	42	96	80	80
Total	71	100	55	100	126	100

Source: Twin Cities sample, personal interviews.

TABLE 21

TWIN CITIANS' FAMILIARITY WITH AND PREFERENCES  
AMONG THE LAKE STATES

Experience and Preferences	Percentage Selecting Each Lake State		
	Minnesota	Wisconsin	Michigan
<b>Number of vacations in each Lake State during the past 5 years:</b>			
None	5	45	75
One or more	95	55	25
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>Ranking of Lake States as preferred site for future summer vacations:</b>			
First	77	14	9
Second	17	59	24
Third	6	27	67
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>Average Rank</b>	<b>1.3</b>	<b>2.1</b>	<b>2.6</b>

Source: Twin Cities sample, personal interview.

and of these, most (56 per cent) had been there seven or more times before (Table 20).

The forecast for the summer of 1969 is also favorable--46 per cent of the Twin Cities sample expect to vacation in the State. An even greater number can be expected to vacation in Minnesota, since analysis of "planned versus actual" vacationing data indicates that about 10 per cent of Twin Citians who plan to vacation elsewhere even as late as the last week in June, in fact end up vacationing in Minnesota.

Another indicator of the generally favorable attitude of Twin Citians toward Minnesota as a vacation state is the fact that they rank the State ahead of both Michigan and Wisconsin as the state they would prefer to vacation in (see Table 21). This is true both for 87 per cent of those whose most important vacation was in Minnesota last summer and for 65 per cent of those whose most important vacation was elsewhere. Wisconsin is the distant second choice (14 per cent ranked it highest), with Michigan third (10 per cent first choices).

These Lake State preferences correspond closely to the Twin Cities sample's past vacationing habits. In the past five years, 95 per cent have vacationed at least once in Minnesota, 55 per cent in Wisconsin, and 25 per cent in Michigan. Clearly, Wisconsin is Minnesota's primary competition for Twin Citians' vacationing dollars.

#### Specific Favorable and Unfavorable Factors

The long personal interviews with Twin Citians who vacationed last

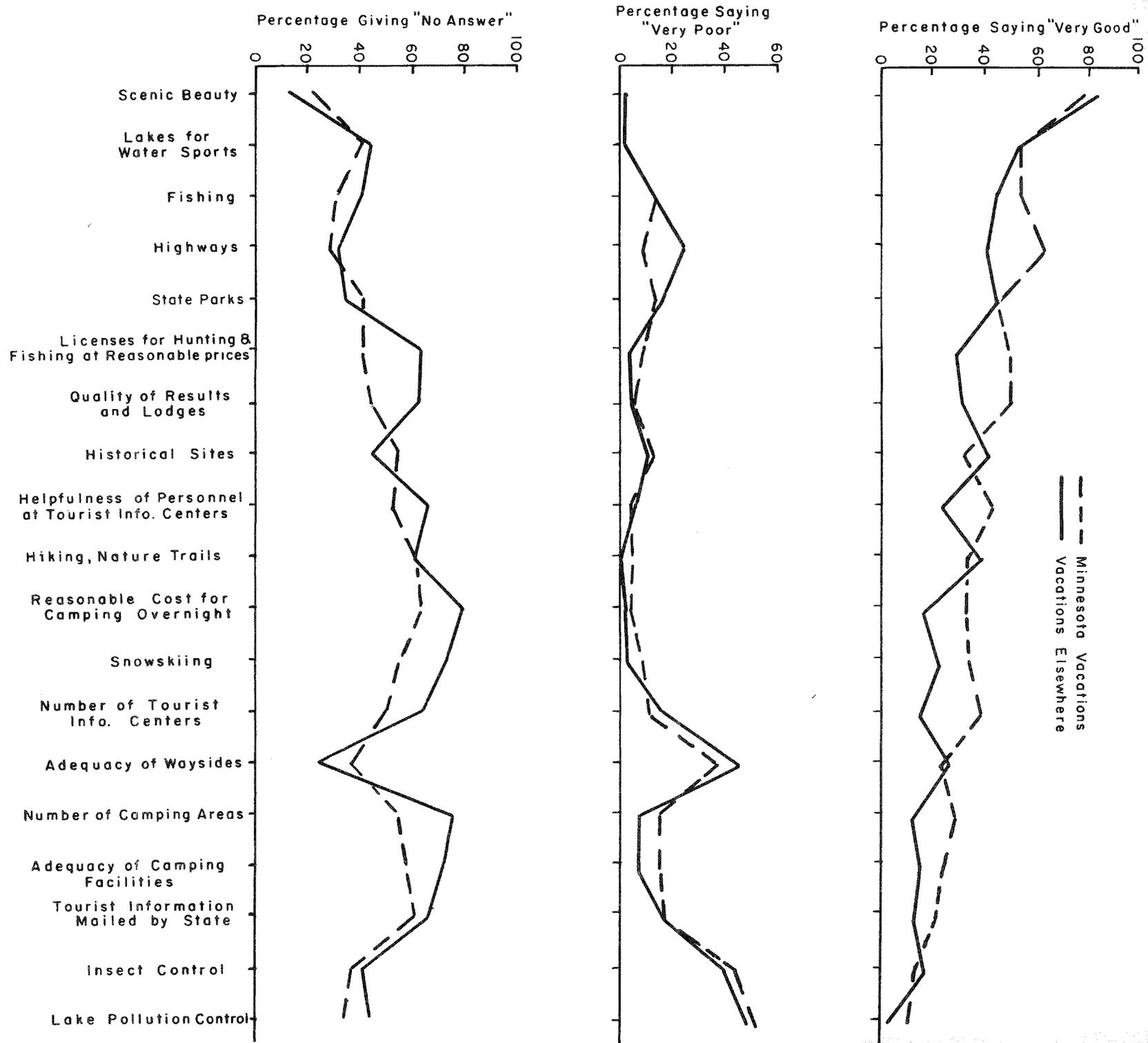
summer yielded much information about specific aspects of vacationing in Minnesota. Respondents looked through a list of nineteen vacation attributes, and picked out those that, in their opinion, described either very good or very poor things about vacationing in Minnesota. These data are summarized in Figure 9.

Very Favorable Attributes. The "big three" very favorable attributes of vacationing in Minnesota are (1) scenic beauty, (2) lakes for water sports, and (3) fishing. Fishing picked up a few negative comments from those who had poor luck last summer--but in no case did respondents say fishing was better in other states.

Somewhat Favorable Attributes. The following factors were judged very good more often than very poor, but less than 50 per cent of the sample said very good: (1) highways, (2) State parks, (3) reasonableness of cost of licenses for hunting and fishing, (4) quality of resorts and lodges, (5) historical sites, (6) helpfulness of personnel at tourist information centers, (7) hiking, nature trails, (8) reasonableness of cost of camping overnight, (9) snowskiing, (10) number of tourist information centers, (11) number of camping areas, and (12) adequacy of facilities at camping areas.

There were some significant differences in ratings by those who did and those who did not take their most important vacation in Minnesota last summer. Twin Citians whose most important vacation was out of state are less favorable about Minnesota's highways, number of tourist information centers, and number and adequacy of facilities at camping areas. These vacationers

Fig. 9-Evaluations of factors affecting Twin Citizens' vacationing in Minnesota.



are clearly those whose primary vacationing activity last summer was camping, and they apparently chose other states for camping at least partly because Minnesota was lacking in these camping-related attributes. Lower-income Twin Citians were more negative about the adequacy of facilities at camping areas than were higher-income respondents. Also, the inadequate number of tourist information centers is quite important since more Twin Citians who vacationed outside the State say this is very poor than say it is very good.

Somewhat Unfavorable Attributes. In this category Twin Citians place the (1) adequacy of waysides and (2) tourist information mailed by the State. In both cases, more respondents considered them very poor than very good, and those who vacationed elsewhere last summer were especially negative about them. The most frequent complaint about tourist information is that it is too general. Many respondents also felt that the State should send out information without having been requested to do so--for example, all people who buy licenses (hunting and fishing) should automatically be sent information.

The adequacy of waysides was criticized for two specific reasons: (1) there are too few, and (2) facilities, especially restrooms and picnic tables, are lacking. Several respondents stated that both the number and the quality of Minnesota's waysides are decidedly inferior, particularly when compared with Wisconsin's.

Very Unfavorable Attributes. Insect control and lake pollution

control were rated very poor. Lake pollution control got special emphasis--many respondents felt that State action is needed to prevent increased lake pollution since fishing and swimming are being affected.

A potentially dangerous trend is implied by the association of "pollution" with "lakes" (whether for fishing or other lake sports). Lakes for water sports and fishing are two of the three most favorable components of Minnesota's image at the present time. Should potential tourists come to believe that Minnesota lakes are polluted, then the very foundation of the presently favorable image will be destroyed.

#### Twin Citians' Recommendations for Improvement

When asked to suggest ways in which Minnesota could improve what it has to offer vacationers, over half of the Twin Citians made recommendations which, in the main, are consistent with the negative aspects of their image of Minnesota. These recommendations are listed by category in Table 22.

Three categories--getting information about where to go, what to do; too few, inadequate waysides/rest areas/picnic areas; and inadequate resort/camping/trailer/parks/hotel/highway facilities--account for all the negative attributes of Minnesota's image except for insect and lake pollution control. The fact that no suggestions were made to improve these two "very unfavorable" image attributes may suggest they are merely a nuisance and may not be critical in deciding whether or not to vacation in Minnesota.

However, the fourth category--not enough things to do--is particularly relevant because Twin Citians making the suggestions mostly went elsewhere for

TABLE 22

## TWIN CITIANS' RECOMMENDATIONS FOR IMPROVING VACATIONING IN MINNESOTA

General Category of Suggestions	% <sup>a</sup>	Specific Suggestions	%
Lack of Tourist Information, directions, and advertising	35	Need more advertising; Advertising should be more interesting. . . . .	18
		Need more road signs showing where things are, esp. historical sites. . . . .	9
		Tourist information sent by State needs improving--have to write too many places before making final plans; don't know where to get information; establish more information centers; more specific information. . . . .	8
Too few, inadequate waysides, rest areas, picnic areas	32	Have more waysides, picnic areas. Nothing to do at waysides--should have playgrounds, picnic tables, maps, travel information, etc.; locate waysides in scenic or historic areas. . . . .	24
		Need toilet at waysides . . . . .	8
Inadequate resorts, camping, trailer, parks, motels, highways	30	Need better highways, esp. smaller roads in state; complete Interstate system. . . . .	12
		Upgrade resorts in Minnesota. . . . .	4
		Improve campground facilities, esp. for trailer camping . . . . .	3
		Have more reasonably priced hotels and motels . . . . .	3
		State parks' admission should be free . . . . .	3
Not enough to do	25	Miscellaneous . . . . .	5
		Nothing to do but sit around--nothing but scenery . . . . .	7
		Need race track in state. . . . .	4
		Bars should be open later and on Sunday; liquor should be less expensive . . . . .	4
		Should promote historical sites, trading-trapping lore, mining, Great Lakes cruises from Duluth . . . . .	4
		Need more plush resorts/nightclubs/restaurants in state . . . . .	3
		Miscellaneous . . . . .	3
Need better swimming, fishing, hunting, canoeing facilities	15	Stock lakes with more fish, too few game birds, fishing and hunting permits too expensive . . . . .	9
		Miscellaneous . . . . .	6
Miscellaneous	15	Sales tax too high--discourages others from vacationing here. . . . .	6
		Discrimination against nonwhites at resorts should be eliminated. . . . .	3
		Local people should be more friendly. . . . .	3
		Miscellaneous . . . . .	3

Source: Personal Interviews of Twin Cities Families.

<sup>a</sup>Answers do not total 100 per cent because of multiple responses.

their most important vacation last summer. Their suggestions centered around improving sightseeing and nightlife.

There is an apparent contradiction in the fact that most Minnesota vacationers say their main purpose is rest and relaxation but the same people complain of not enough things to do. The explanation is that although a necessary condition for their vacationing is the opportunity to rest and relax, that is not a sufficient condition--there have to be things to see and do. That this is true is clearly implied in Figure 6: over half the Twin Citians say that sightseeing, entertainment-nightlife, and a variety of activities are important in deciding where to go on vacations, whereas only 11 per cent say that privacy, rest, and relaxation is important.

#### Minnesota's Vacation Image among Midwesterners

It can be seen from Table 23, that 92 per cent of the non-Minnesotan Midwesterners who vacationed in the State last summer definitely or probably will return to Minnesota for a vacation in the future. About the same number of non-Wisconsin Midwesterners intend to vacation again in Wisconsin (90 per cent). Over one fourth of these Midwesterners had vacationed in Minnesota five times or more before last summer, and most (68 percent) had vacationed at the same location at least once before.

The same nineteen vacation attributes rated by the Twin Cities sample were also rated by the Midwestern sample. In this case, however, respondents rated each attribute on a three-point scale (fair to poor, good, excellent). The results of these ratings can be used in a comparison of Minnesota's and

TABLE 23

PAST AND FUTURE VACATION DESTINATION STATES OF MIDWESTERNERS  
WHO VACATIONED IN MINNESOTA OR WISCONSIN IN 1968

Data on Destination	Non-Minnesotan Midwesterners Vacationing in Minnesota Only			Non-Wisconsin Midwesterners Vacationing in Wisconsin Only		
	No.	%	%	No.	%	%
<b>Number of vacations in state in the past 5 years</b>						
None--this was first time.	35	18	18	28	18	18
Once before . . . . .						
Twice before . . . . .	31	16	44	10	6	38
3-5 times before . . . . .	57	30	74	40	25	63
More than 5 times before .	51	26	100	58	37	100
<b>Total</b>	<b>193</b>	<b>100</b>		<b>159</b>	<b>100</b>	
<b>Plan to return to state</b>						
Definitely yes . . . . .	128	66	66	115	72	72
Probably yes . . . . .	51	26	92	28	18	90
Not sure, don't know . . .	8	4	96	10	6	96
Probably not . . . . .	7	4	100	5	3	99
Definitely not	-	-	100	1	1	100
<b>Total</b>	<b>194</b>	<b>100</b>		<b>159</b>	<b>100</b>	
<b>Number of vacations at this specific location in the past 5 years</b>						
None--this was first time.	60	32	32	55	35	35
Once before . . . . .	21	11	43	29	19	54
Twice before . . . . .	28	15	58	10	6	60
3-5 times before . . . . .	38	21	79	29	19	79
More than 5 times before .	39	21	100	33	21	100
<b>Total</b>	<b>186</b>	<b>100</b>		<b>156</b>	<b>100</b>	
<b>Plan to return to this location</b>						
Definitely yes . . . . .	95	50	50	79	51	51
Probably yes . . . . .	56	29	79	38	24	75
Not sure, don't know . . .	28	15	94	26	17	92
Probably not . . . . .	8	4	98	10	6	98
Definitely not . . . . .	3	2	100	3	2	100
<b>Total</b>	<b>190</b>	<b>100</b>		<b>156</b>	<b>100</b>	

Source: Midwestern sample.

Wisconsin's vacation products and over-all images. Minnesota's image relative to Wisconsin's can be assessed through the eyes of three important groups of vacationers who reside in the Midwest and who are represented in the sample. Thus, Minnesota's image can be compared with that of Wisconsin among Midwesterners who vacationed last summer:

- In Minnesota but not in Wisconsin (Table 24)
- In both Minnesota and Wisconsin (Table 25)
- In Wisconsin but not in Minnesota (Table 26).

#### Minnesota Vacationers

Table 24 sets forth Minnesota's image among those who, on the whole, prefer vacationing in Minnesota. It can therefore be assumed that those attributes on which Minnesota has at least a fifteen-point margin over Wisconsin are particularly important positive elements in Minnesota's image--things that should be stressed in promotion and that should receive special attention in product improvement. These competitively superior attributes are: (1) quality of resorts and lodges, (2) fishing, and (3) lakes for water sports. All are rated excellent.

#### Vacationers in Minnesota and Wisconsin

Those Midwesterners who vacationed in both states are a particularly important and critical audience. Looking at their ratings in Table 25 confirms inferences drawn from the ratings of the Twin Cities sample: Minnesota vacation product is competitively inferior to Wisconsin's in (1) adequacy of waysides, (2) the adequacy of tourist information sent by the State, (3) historic sites, and (4) snowskiing. The deficiency in historic sites may

TABLE 24

STRONG POINTS OF MINNESOTA'S IMAGE<sup>a</sup>

Vacation Attribute <sup>b</sup>	Image among Midwesterners Who Vacationed in Minnesota Only	
	Minnesota's Image	Wisconsin's Image
1. Number of tourist information centers . . . . .	55 Good	60 Good
2. Helpfulness of personnel at information centers . . . .	60 Good	60 Good
3. Adequacy of waysides . . . . .	45 Good	60 Good
4. Number of camping areas . . . .	60 Good	60 Good
5. Adequacy of facilities at camping areas . . . . .	50 Good	55 Good
6. Reasonableness of cost of camping overnight . . . . .	55 Good	55 Good
7. Reasonableness of cost of sporting licenses . . . . .	45 Good	45 Good
8. <u>QUALITY OF RESORTS, LODGES</u>	*80 Excellent	55 Good
9. Highways . . . . .	60 Good	60 Good
10. Historic sites . . . . .	55 Good	50 Good
11. Scenic beauty . . . . .	85 Excellent	80 Excellent
12. Hiking, nature trails . . . . .	65 Very Good	60 Good
13. Snowskiing . . . . .	70 Very Good	65 Very Good
14. <u>FISHING</u> . . . . .	*80 Excellent	65 Very Good
15. <u>LAKES FOR WATER SPORTS</u> . . . .	*90 Excellent	75 Excellent
16. State parks . . . . .	70 Very Good	65 Very Good
17. Lake pollution . . . . .	35 Fair	35 Fair
18. Insect control . . . . .	20 Poor	20 Poor
19. Tourist information sent by state . . . . .	50 Good	50 Good
Average . . . . .	60 Good	55 Good

<sup>a</sup>Meaning of scores: 75+ Excellent  
 65-70 Very Good  
 40-60 Good  
 30-35 Fair  
 -25 Poor

<sup>b</sup>Attribute is capitalized and underlined if there is meaningful difference (at least 15 points) between the two states. The higher rated state on that attribute is indicated by an asterisk.

Source: Midwestern sample.

TABLE 25

COMPETITIVE IMAGE: MINNESOTA'S VERSUS WISCONSIN'S<sup>a</sup>

Vacation Attribute <sup>b</sup>	Image among Midwesterners Who Vacationed in Both States	
	Minnesota's Image	Wisconsin's Image
1. Number of tourist information centers . . . . .	50 Good	60 Good
2. Helpfulness of personnel at information centers . . . . .	60 Good	65 Very Good
3. <u>ADEQUACY OF WAYSIDES</u> . . . . .	45 Good	*60 Good
4. Number of camping areas . . . . .	60 Good	60 Good
5. Adequacy of facilities at camping areas . . . . .	60 Good	60 Good
6. Reasonableness of cost of camping overnight . . . . .	60 Good	60 Good
7. <u>REASONABLENESS OF COST OF SPORTING LICENSES</u>	*65 Very Good	40 Good
8. Quality of resorts, lodges . . . . .	65 Very Good	65 Very Good
9. Highways . . . . .	65 Very Good	60 Good
10. <u>HISTORIC SITES</u> . . . . .	40 Good	*60 Good
11. Scenic beauty . . . . .	90 Excellent	85 Excellent
12. Hiking, nature trails . . . . .	65 Very Good	65 Very Good
13. <u>SNOWSKIING</u> . . . . .	70 Very Good	*90 Excellent
14. Fishing . . . . .	70 Very Good	70 Very Good
15. Lakes for water sports . . . . .	85 Excellent	75 Excellent
16. State parks . . . . .	65 Very Good	70 Very Good
17. Lake pollution . . . . .	35 Fair	30 Fair
18. Insect control . . . . .	25 Poor	20 Poor
19. <u>TOURIST INFORMATION SENT BY STATE</u>	50 Good	*65 Very Good
Average . . . . .	60 Good	60 Good

<sup>a</sup> Meaning of scores: 75+ Excellent  
 65-70 Very Good  
 40-60 Good  
 30-35 Fair  
 -25 Poor

<sup>b</sup> Attribute is capitalized and underlined if there is meaningful difference (at least 15 points) between the two states. The higher rated state on that attribute is indicated by an asterisk.

Source: Midwestern sample.

TABLE 26  
STRONG POINTS OF WISCONSIN'S IMAGE<sup>a</sup>

Attribute <sup>b</sup>	Wisconsin's Image as Seen By all Midwesterners Who Vacationed in Wisc. Only	Minnesota's Image as Seen By all Midwesterners Who Vacationed in Wisc. Only
1. <u>NUMBER OF TOURIST INFORMATION CENTERS</u>	*70 Very Good	55 Good
2. Helpfulness of personnel at information centers	65 Very Good	60 Good
3. <u>ADEQUACY OF WAYSIDES</u>	*70 Very Good	50 Good
4. Number of camping areas	70 Very Good	60 Good
5. Adequacy of facilities at camping areas	60 Good	55 Good
6. Reasonableness of cost of camping overnight	55 Good	50 Good
7. Reasonableness of cost of sporting licenses	50 Good	45 Good
8. Quality of resorts, lodges	70 Very Good	60 Good
9. <u>HIGHWAYS</u>	*70 Very Good	55 Good
10. Historic sites	60 Good	50 Good
11. Scenic beauty	90 Excellent	80 Excellent
12. Hiking, nature trails	70 Very Good	65 Very Good
13. Snowskiing	70 Very Good	70 Very Good
14. <u>FISHING</u>	75 Excellent	*90 Excellent
15. Lake for water sports	85 Excellent	85 Excellent
16. State parks	70 Very Good	60 Good
17. Lake pollution	35 Fair	40 Good
18. Insect control	30 Fair	30 Fair
19. Tourist information sent by state	65 Very Good	60 Good
Average . . . . .	65 Very Good	60 Good

<sup>a</sup>Meaning of scores: 75+ Excellent  
65-70 Very Good  
40-60 Good  
30-35 Fair  
-25 Poor

<sup>b</sup>Attribute is capitalized and underlined if there is meaningful difference (at least 15 points) between the two states. The higher rated state on that attribute is indicated by an asterisk.

Source: NFO Mail Survey of Midwestern Families.

help explain why prior research has shown Wisconsin superior to Minnesota in sightseeing.

This group rates Minnesota competitively superior to Wisconsin on only one factor: the cost of licenses for hunting and fishing.

#### Wisconsin Vacationers

Additional negative aspects of Minnesota's vacation image may be inferred from Table 26, which presents the strong points of Wisconsin's image. The Midwesterners whose answers appear in this table vacationed in Wisconsin only last summer, and hence might be considered less favorably disposed toward Minnesota. But even so, this group rated Minnesota higher on fishing than Wisconsin. These respondents criticized (1) the adequacy of Minnesota's waysides relative to Wisconsin's, (2) highways, and (3) the number of tourist information centers. The latter two also received negative comments from Twin Citians who went out of state for their most important vacation last summer.

Again, although lake pollution and insect control are rated generally fair to poor in Minnesota by all the groups of Midwesterners, these attributes seem to be more a nuisance than of critical importance, since they are also rated unfavorably for Wisconsin.

Table 27 summarizes what Midwesterners enjoyed most and least about their Minnesota vacation. Since this was an open-end question in which respondents were not directed to evaluate specific vacationing features, only a few of the answers they gave can be directly compared to the nineteen-point

TABLE 27

MOST AND LEAST ENJOYED ELEMENTS OF MINNESOTA VACATIONS  
TAKEN BY MIDWESTERNERS

Item	Vacationed only in Minnesota	Vacationed in Both Minnesota and Wisconsin
	%	%
<u>Liked most</u>		
Scenery, sightseeing . . .	63	67
Fishing . . . . .	40	23
Water sports, lakes. . . .	28	20
Campsites, lodging . . . .	13	15
Rest, relaxation, privacy.	18	13
Friendliness of people . .	11	13
Boating. . . . .	9	11
Swimming . . . . .	9	9
Relatives. . . . .	16	11
Nightlife, entertainment, plays. . . . .	10	8
Hunting. . . . .	2	1
Other. . . . .	32	24
<u>Liked least</u>		
Weather. . . . .	17	21
Highways, traffic. . . . .	12	20
Insects, bugs. . . . .	25	19
Bad fishing. . . . .	3	5
Bad, expensive, crowded lodging, campsites . . . .	3	4
Lake pollution . . . . .	4	4
Lack of or poor quality waysides . . . . .	4	3
Expensive food . . . . .	2	1
Distance--too far. . . . .	1	1
Not enough to do . . . . .	1	0
Other. . . . .	13	16

Source: Midwestern sample.

image ratings.

However, one fourth of those vacationing in Minnesota only mentioned insects as the thing they disliked most about their Minnesota vacation. On the other hand, those vacationing in both Minnesota and Wisconsin were less critical of Minnesota's insect control than were those vacationing in Minnesota only. In short, this is a problem, but it does not seem to be a competitive disadvantage.

Highways and traffic were mentioned as elements liked least by about one seventh of the respondents, and adequacy of waysides was mentioned also, but infrequently (4 per cent).

On the plus side, Minnesota's "big three" positive attributes appear at the top of the list: scenery, lakes for water sports, and fishing.

#### Minnesota's Vacation Image among the Target Sample

The Target sample consisted of Midwesterners who reside outside the Lake States, who vacationed in the Midwest last summer but not in the Lake States, and whose main purpose in the vacation was something other than visiting relatives. Presumably, almost any of their vacation purposes and the activities they engaged in could have been satisfied by a Minnesota vacation.

The 196 respondents were asked about their past vacationing behavior and about their attitudes toward and familiarity with Minnesota as a vacation destination. Only 5 per cent had considered Minnesota as a destination state instead of the state(s) they vacationed in last summer--over half of these people listed fishing as their primary vacationing purpose, and all the rest

listed water-related sports.

Table 28 summarizes their past vacations in, familiarity with, and future intentions toward Minnesota as a vacation destination. The total respondent group was divided into two groups--Eastern (residing in Illinois, Indiana, or Ohio) and Western (residing in the Dakotas, Nebraska, Kansas, Iowa, or Missouri).

Midwesterners to the west and south of Minnesota are more familiar with the State and have vacationed here more often before than have those to the east. However, there are no differences between the two groups' intentions of vacationing here in the future--in each case, 18 per cent probably will vacation here in the future, but 36 per cent say they probably will not. Over half of those who probably will not take a Minnesota vacation explained that they prefer other states, the State is too far away, or they have no friends or relatives in Minnesota.

Among those who probably will take a Minnesota vacation, fishing, scenery, and camping account for most of the reasons. However, there are some interesting differences between the Eastern and Western groups that may have advertising implications. Westerners probably will come to Minnesota to fish (39 per cent), whereas Easterners would come camping (28 per cent) and sightseeing (28 per cent). Only 11 per cent of the Easterners would come for fishing--Wisconsin and Michigan are presumably the sites of most fishing vacations taken by residents of Illinois, Indiana, or Ohio. The optimum advertising strategy would seem to stress the fishing vacation for the Western group and the sightseeing/camping vacation for the Eastern group.

TABLE 28

MEASURES OF INTEREST IN MINNESOTA VACATION  
AMONG MIDWESTERNERS IN TARGET MARKET<sup>a</sup>

Measure and Response	Part of Midwest in Which Family Lives <sup>b</sup>	
	Western %	Eastern %
<b>Familiarity with Minnesota</b>		
Very familiar . . . . .	2	4
Somewhat familiar . . . . .	48	32
Unfamiliar . . . . .	50	64
<b>Total</b>	<b>100</b>	<b>100</b>
<b>Number of Vacations in Minnesota</b>		
None . . . . .	78	88
1-2 times . . . . .	18	9
3-5 times . . . . .	4	3
<b>Total</b>	<b>100</b>	<b>100</b>
<b>Intend to vacation in Minnesota in future</b>		
Probably yes <sup>c</sup> . . . . .	18	18
Fishing . . . . .	7	2
Sights/scenery . . . . .	5	5
Camping . . . . .	2	5
Visit friends/relatives . . . . .	2	4
Other . . . . .	2	2
Not sure . . . . .	46	46
Probably not <sup>c</sup> . . . . .	36	36
Prefer other states . . . . .	8	10
No friends/relatives in Minnesota . . . . .	4	4
Too far away . . . . .	7	9
Don't fish, camp . . . . .	6	1
Unfavorable past experience . . . . .	2	-
Other . . . . .	9	12
<b>Total</b>	<b>100</b>	<b>100</b>

Source: Midwestern sample.

<sup>a</sup>Target market Midwesterners are those families who vacationed last summer in the Midwest outside the three Lake States and whose primary vacation reason was other than visiting relatives.

<sup>b</sup>Western portion of Midwest includes the Dakotas, Nebraska, Kansas, Iowa, and Missouri; Eastern portion includes Illinois, Indiana, and Ohio.

<sup>c</sup>Respondents were then asked why or why not.

The important point is that the Easterners are closer to other good fishing states, so they must have other reasons for wanting to come to Minnesota.

Other analyses of these data have further advertising implications. First, the younger the housewife (particularly if she is under forty), the more likely she is to say that her family will probably vacation here in the future. But, second, it is the same younger housewife who is less familiar with Minnesota as a vacation state. Clearly, it would be to the State's advantage if more advertising were to reach these younger families.

#### Conclusions

Minnesota's most favorably rated vacation attributes are:

- Scenery
- Lakes for water sports
- Fishing

These attributes are consistent with Minnesota vacationers' major reasons for vacationing in the State. All three, and especially fishing, should be stressed in advertising directed at Midwesterners residing in states to the west and south of Minnesota; and all three, with the addition of camping and sightseeing, should be emphasized in advertising in Illinois, Indiana, and Ohio.

However, analyses of Minnesota's image suggest that, at the present time, potential and actual vacationers do not rate Minnesota so favorably in sightseeing as they do Wisconsin. This is reflected in the ratings given the states by those Midwesterners who vacationed in both states--they rate

Wisconsin superior in historic sites, which are, certainly, an important component of sightseeing. Similarly, when asked to recommend improvements in Minnesota vacations, Twin Citians frequently mentioned their dissatisfaction with the lack of variety in things to do and see--especially, nightlife and other adult-related entertainment activities. These would seem to be additional components of sightseeing.

In addition to deficiencies in sightseeing, the following attributes require attention. They are listed in order of decreasing importance.

1. Adequacy of waysides. Both the inadequate number and the quality of waysides in Minnesota were found to be negative, important aspects of Minnesota's vacation image. Twin Citians emphasized this, especially those who left the State last summer for their most important vacation. Midwesterners who vacationed in both Minnesota and Wisconsin said Minnesota's waysides are inferior, and so did Midwesterners who vacationed in Wisconsin only last summer. More are needed, and better facilities should be added (especially restrooms) if the State wants to attract vacationers and to encourage them to return.

2. Adequacy of Tourist Information Mailed by State. Both Twin Citians and Midwesterners who vacationed in both Minnesota and Wisconsin rated Minnesota less favorably than the competition in this regard. The importance of this information in planning vacations was discussed in Section 5. Minnesota's information is not sufficiently specific and is not so "interesting" as information sent by other states. Clearly, the State cannot

promote what it does not have--or it runs the risk of failing to fulfill consumer expectations. However, potential vacationers say that the information per se can be improved. For example, it would help to reduce the number of steps required to get complete information about a specific facility so that reservations can be made as quickly as possible. Information could be sent even when it is not requested (for example, to applicants for licenses and permits).

3. Number of Tourist Information Centers. Twin Citians whose most important vacation was out of state last summer, and Midwesterners who vacationed in Wisconsin only last summer, felt the need for more information centers. This deficiency is reinforced by Twin Citians' comments when asked to suggest ways in which vacationing in Minnesota could be improved. This criticism is closely related to the deficiency in the quality of tourist information. In short, vacationers believe that Minnesota could make it easier to find out what there is to do and see in the State.

4. Adequacy of Facilities at Camping Areas. Twin Citians vacationing out of state were critical of camping facilities, particularly the lower-income campers. Although Midwesterners do not rate Minnesota significantly lower than Wisconsin, the State is rated "less good," both by Midwesterners who vacationed in Minnesota only and by those who vacationed in Wisconsin only. Many Midwesterners--particularly those who live in Illinois, Indiana, and Wisconsin--would probably come to Minnesota in the future for a camping vacation, and hence, product improvement might well be made here to prevent the loss of potential camping vacationers to competing states.

5. Highways. Both Twin Citians vacationing elsewhere and Midwesterners vacationing in Wisconsin only last summer said that Minnesota's highways are "less good" than Wisconsin's. Highway improvement, particularly in the backroad areas, was frequently mentioned by the Twin Citians asked to suggest needed improvements; several said the interstate system should be completed and/or extended.

6. Insect Control and Lake Pollution Control. These are the two most negative features of Minnesota's image--but they are also the most negative features of Wisconsin's image. None of the data gathered in this study suggest that either of these problems, at the present time, are critically related to increasing vacationing in our State. They are nuisances which could and should be improved, but which would not seem to have priority in a list of recommended product improvement actions. However, the extent of lake pollution very much influences the quality of fishing and the quality of the lakes for water sports. These are two of Minnesota's three most favorable image attributes. Therefore, a sudden increase in lake pollution associated with Minnesota's image as seen by potential vacationers could have disastrous consequences.

The following features are favorably rated and would seem to require no radical programs of product improvement at the present time:

1. Reasonableness of cost of licenses for hunting and fishing.
2. State parks.
3. Quality of resorts and lodges.

4. Helpfulness of personnel at tourist information centers.
5. Hiking-nature trails.
6. Reasonableness of cost of camping overnight.
7. Number of camping areas.

Finally, potential tourists are not sufficiently familiar with Minnesota as a vacation state. Midwesterners who vacationed last summer in the Midwest but not in the Lake States and whose vacation purpose conceivably could have been satisfied by a Minnesota vacation were asked how familiar they were with Minnesota. Only 3 per cent said very familiar--well over half said unfamiliar. Minnesota clearly would benefit from an expanded advertising effort.

## 7. ADVERTISING

This section analyzes the tourist advertising program for the State of Minnesota. Answers are sought for the following questions:

- How does Minnesota rank with other states in the Midwest with respect to total advertising expenditures?
- To what degree are Midwestern vacationers aware of Minnesota advertising?
- Do the individual advertising appeals communicate effectively and is the media schedule appropriate?
- How can the direct-mail promotion and informational material sent to coupon mailers be improved?

### Advertising Expenditures

Comparison of Minnesota's advertising expenditures with those of other Midwestern states is a difficult task, since each state includes a different mix of promotional elements. For instance, one state might include in its budget only advertising to tourists in measured media, another state might also include advertising to increase the state's industrial development, and a third might include the costs of producing and disseminating brochures and other promotional material in response to inquiries.

To put all states on a common base, this analysis will consider only advertising expenditures in measured media--defined as magazines, newspapers, television, and radio. Table 29 presents a comparative analysis of these

TABLE 29

## TOURIST ADVERTISING EXPENDITURES IN MEASURED MEDIA IN THE U.S.--1966 AND 1967, IN DOLLARS

State	Year	Magazines	Newspapers	Television	Radio	Total	Rank <sup>a</sup>
Minnesota	1966	\$ 6,652	\$31,970	\$	\$	\$ 38,622	38
	1967	40,000	14,000		95,000	149,000	18
Wisconsin	1966	147,536	91,731			239,267	8
	1967	141,000	80,000			221,000	11
Michigan	1966	223,730	60,267	22,200	600	306,797	5
	1967	214,000	22,000	10,000	15,000	261,000	7
North Dakota	1966	12,247				12,247	45
	1967	13,000				13,000	46
South Dakota	1966	122,101	10,913			133,014	20
	1967	160,000	22,000			182,000	14
Nebraska	1966	13,956	631	600		15,187	44
	1967	10,000	2,000	3,000		15,000	45
Kansas	1966	3,308	392			3,700	48
	1967	10,000	7,000			17,000	44
Missouri	1966	40,318	23,646			63,964	30
	1967	47,000	21,000			68,000	29
Iowa	1966		7,269			7,269	46
	1967		2,000			2,000	48
Illinois	1966		41,863			41,863	36
	1967		5,000			5,000	47
Indiana	1966	22,542				22,542	42
	1967	41,000	12,000			53,000	34
Ohio	1966						50
	1967						50

Source: Travel Research International, Inc., References 21 and 22.

<sup>a</sup>Rank among the 50 states.

expenditures for the twelve Midwestern states. These figures represent a measure of the advertising impact on the potential tourist through the channels of ordinary media.

In 1967, Michigan and Wisconsin led the Midwestern states with media expenditures of \$261,000 and \$221,000, respectively. South Dakota ranked third with expenditures of \$182,000 and Minnesota was fourth with \$149,000. In short, Minnesota's advertising budget is considerably less than the major competitive states of Wisconsin and Michigan.

#### Advertising Awareness

##### Total Advertising Awareness

To determine the degree to which vacationers are aware of Minnesota tourist advertising in magazines, respondents were shown a layout of four different ads which had appeared in a variety of magazines. This layout is reproduced in Figure 10 as seen by the respondents, except that the only captions they saw were the numbers used to identify each of the four ads.

Three different samples were shown this layout and asked, Have you seen any of these ads before? The samples were:

- 100 of the 126 respondents from the Twin Cities sample who had actually vacationed during the summer of 1968.<sup>1</sup>
- 196 respondents in the Target sample, from the Midwestern states other than Minnesota and Wisconsin who had vacationed but not in

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<sup>1</sup>This attrition in the Twin Cities personal interview sample and the Midwestern sample is due to their original declaration of intentions to vacation (which placed them in the sample) but their failure to carry out these intentions and vacation as anticipated (which eliminated them from some tabulations).

AD NO. 1

**You're in Minnesota and the light is going fast...**  
*You're in luck.*

There's no better place in the world to try new techniques or improve the old. Minnesota is many moods to the photographer... Morning mist rolling over our waters... huge mining shovels battling an iron range for its red ore... seascapes and fishing villages on the shores of Lake Superior... popcorn clouds buttered by the summer sun... wide-eyed smiles at a folk festival... our rugged southeast region that the Great Glacier forgot... North America's last canoe wilderness... our central lake country, rich in Indian and Viking folklore... majestic waterfalls and sparkling streams... symphonic sunsets in the cool summer evenings... more than 40 shades of green, red, or any other color... unlimited! You can photograph world-famous Minochaha Falls, then attend a major-league ballgame within a half hour. Or capture a farmer's flowing field, with a metropolitan skyline as a background. And beautiful women—naturally. Visit Minnesota this summer. Whether in the sun's brightness or a thundershower's gloom, you'll get shots you never thought existed. This must be the end of the rainbow.

**minnesota!**  
 10,000 LAKES

Send for more information about the photogenic (and fun) Minnesota scene. Write:  
 Vacation Information Bureau • Dept. 126-P  
 57 West 7th Street • St. Paul, Minnesota 55102

"Light is Going Fast"

AD NO. 2

**Please don't eat the scenery**

at least until you've taken a picture of it.

Some visitors are carried away by edible scenery. For example, you'll see men smoking whitefish on the shores of Lake Superior... Indians hand-threshing wild rice... wild-wind's reamergaters spring their succulent masterpieces. If you're a spelunker who enjoys delectable sights, you'll take delight in our caves full of mushroom, blue cheese and beer.

Each night can turn you on as much as our 10,000-plus lakefuls of clean, clear water, our piney forests and the resty air of our post-800 summers (warm, but never hot). We love a number of people here with our fishing. Others, interested in relaxation only, prefer to eat our famous waterfryes fresh-caught by somebody else.

There's no need to rush. Enjoy the view. Remember it in pictures. Take our year fill in our famous restaurants or taverns, or from your own camp or cottage cookfire.

**minnesota!**  
 10,000 LAKES

Fill in to keep the scenery. Send me a guide right now.

NAME \_\_\_\_\_  
 ADDRESS \_\_\_\_\_  
 CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

Vacation Information Bureau • Dept. 126-B  
 57 West 7th Street • St. Paul, Minnesota 55102

"Don't Eat the Scenery"

AD NO. 3

**No other summer is quite like our "bad skiing season"**

"Five months of bad skiing" is the label vaudeville comics once gave Minnesota summers. True, our winters are a bit rugged, but we put up with them because our summers are so great. Warm... but never too hot. And there's always one of our 10,000-plus lakes nearby. To fish in, to swim in, to take pictures by, to water ski in, to watch handsome girls go by, or just to snooze to the sound of waves.

Minnesota's summer abounds with concerts, theatre, major-league baseball games, festivals, and plenty of excuses to dance in the streets. Relax or live it up. This is Minnesota! If you do enjoy winter sports, we have another story to tell about Minnesota. Another time.

**minnesota!**  
 10,000 LAKES

Fill in to hear more about things to do during your best skiing season. Minnesota

NAME \_\_\_\_\_  
 ADDRESS \_\_\_\_\_  
 CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

Vacation Information Bureau • Dept. 128-B  
 57 West 7th Street • St. Paul, Minnesota 55102

"Bad Skiing Season"

AD NO. 4

**Have you ever been to the top of the map?**

Want to get to know some unusual states without worrying about language problems? Or whether they're changing your money rights? Meet some native Minnesotans. When we show out we make the most of our summer (warm... but not too hot). We're so fun-minded we don't have enough excuses for celebrations. So we invent our own. We celebrate everything from Chinese New Year to Bastille Day. We put on funny hats and dance in the streets on Swedish holidays. Italian holidays. Dutch holidays. We punctuate our busy summer with German holidays. Hungarian holidays. Bohemian holidays. The ladies cook up a storm for Irish holidays. Mexican holidays. Welsh holidays. Danish holidays, and a few we invented ourselves. Our Minneapolis Aquatennial is always the nation's greatest summer festival. You name it, we'll tell you where the action is. And the best part of driving on a festival-hopping vacation in Minnesota is that you can also enjoy the everyday summer fun that's a natural part of living here. We make the most of our 10,000-plus lakes. Come join us.

**minnesota!**  
 10,000 LAKES

Fill in to hear more about things to do during your best skiing season. Minnesota

NAME \_\_\_\_\_  
 ADDRESS \_\_\_\_\_  
 CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

Vacation Information Bureau • Dept. 132-B  
 57 West 7th Street • St. Paul, Minnesota 55102

"Top of the Map"

Minnesota or Wisconsin.

- 612 of the 706 respondents from the Midwestern sample who had actually vacationed in Minnesota or Wisconsin.

The advertising awareness of the Twin Cities sample and the Midwestern sample were approximately equal, with 30 and 29 per cent, respectively. In both samples those who had vacationed in Minnesota were more aware of Minnesota's advertising than those who had vacationed in Wisconsin. Predictably, the target sample was considerably less aware of Minnesota's advertising with only 24 per cent aware of any of the ads. In all cases, fewer than one out of three people had seen any ads for the State of Minnesota, a level of advertising awareness that is certainly less than desirable among tourists in the State's primary market area.

#### Awareness of Individual Ads

Figure 11 illustrates the awareness of the individual ads in the three samples. The Midwestern sample, who vacationed in Minnesota or Wisconsin, had the highest degree of advertising awareness for all four ads. Surprisingly, the Twin Cities sample and the Target sample were approximately equal --one would have expected the Twin Cities sample to score higher, since the majority of this group took Minnesota vacations.

Figure 12 shows the advertising awareness of three subgroups of the Midwestern sample:

- Those who vacationed in Minnesota only.
- Those who vacationed in Wisconsin only.

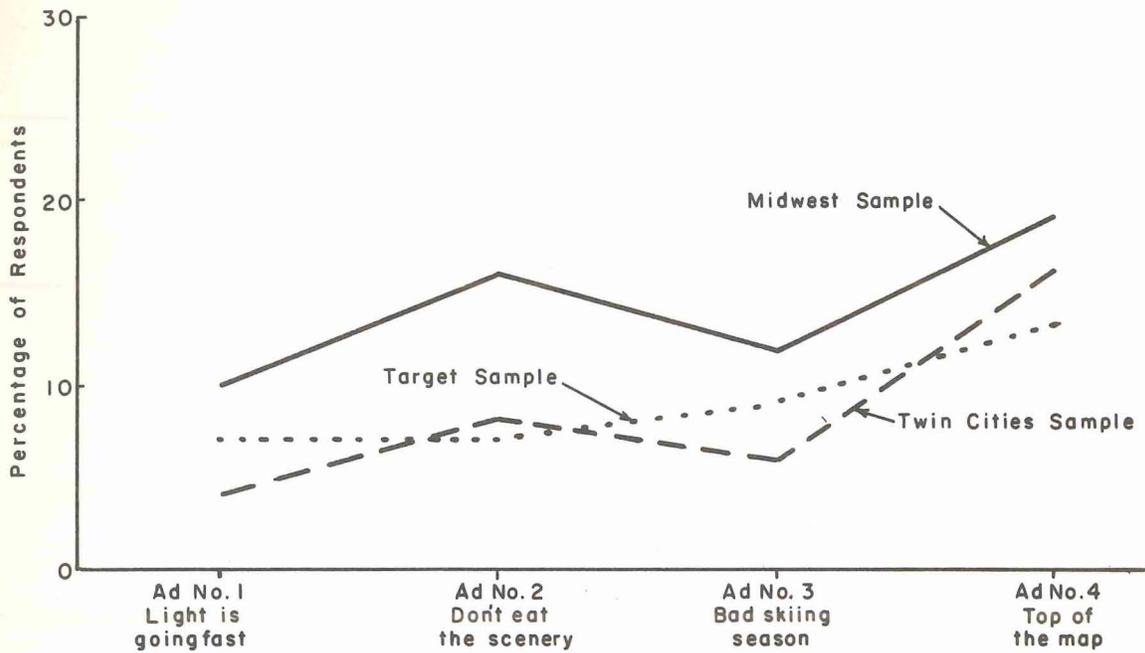


Fig. 11 - Percentage of respondents in each sample who had seen individual Minnesota advertisements.

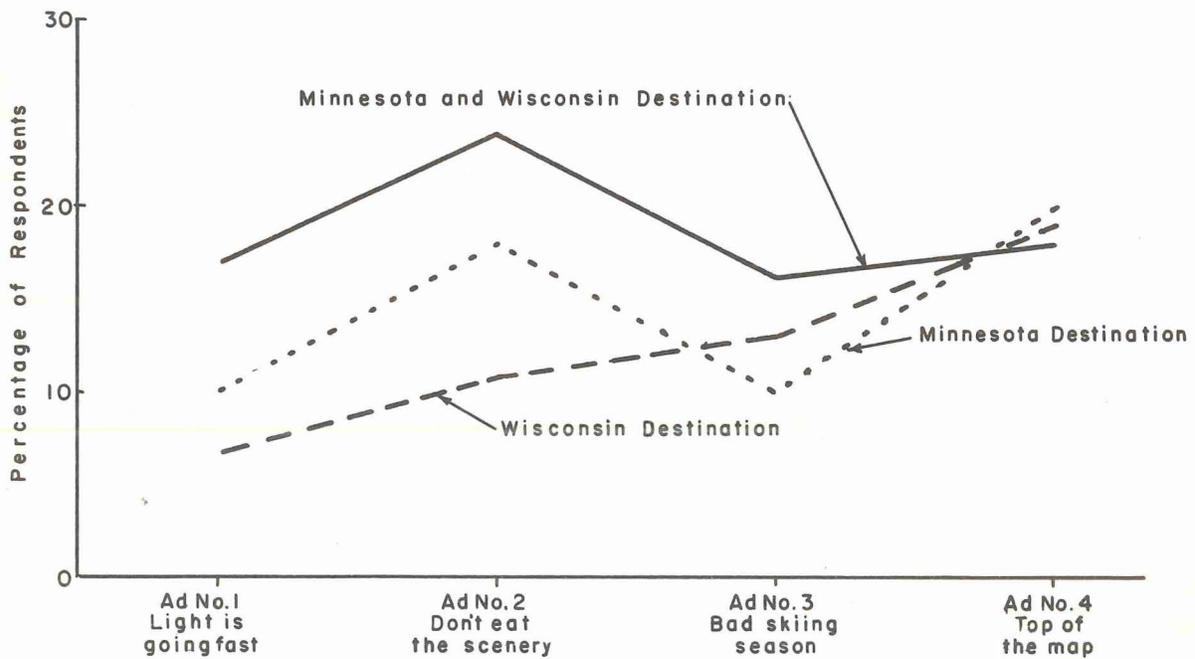


Fig. 12 - Percentage of respondents with Minnesota or Wisconsin as destination states who had seen individual Minnesota advertisements.

- Those who vacationed in both Minnesota and Wisconsin.

Not surprisingly, the vacationers in both Minnesota and Wisconsin were the most aware of the ads, followed by Minnesota vacationers and Wisconsin vacationers in that order.

For a variety of reasons, advertising awareness in most, if not all, studies tends to be overstated. Respondents either try to please the interviewer by giving the answer they think he wants, confuse the test ads with other similar ads, or give answers which will enhance their personal status. Thus, the absolute levels of awareness are probably lower than stated in the tables although relative levels of awareness should be reasonably accurate.

#### Awareness and Minnesota Vacationing

Table 30 shows that the greater the awareness of Minnesota magazine advertisements, the greater the likelihood of vacationers' choosing to come to Minnesota. Nearly twice as many of those in the Target sample who are aware of Minnesota tourist advertising indicate they will probably vacation in Minnesota. Similarly, a much higher proportion of the unaware group indicate they will probably not vacation in Minnesota. Thus, as the State increases its advertising of the virtues of Minnesota as a vacationland, it can expect to attract more tourists.

#### Familiarity with Minnesota's Vacation Regions

Respondents in the Twin Cities sample were also queried about their familiarity with the State's six regions. Table 31 presents the number and

TABLE 30

RELATION BETWEEN ADVERTISING AWARENESS AND FUTURE MINNESOTA VACATIONS  
FOR TARGET SAMPLE

Likelihood of Future Minnesota Vacation	Awareness of Minnesota Advertising	
	Aware	Unaware
<b>Probable</b>		
Number . . . . .	13	23
Percentage . . . . .	25%	14%
<b>Don't know</b>		
Number . . . . .	23	75
Percentage . . . . .	45%	47%
<b>Probably not</b>		
Number . . . . .	15	61
Percentage . . . . .	29%	38%
Total number . . . . .	51	159

Source: Target sample.

TABLE 31

TWIN CITIANS' FAMILIARITY WITH AND IDENTIFICATION  
OF MINNESOTA'S VACATION REGIONS

Area	Familiar with Names of Vacation Regions		Correctly Identified Vacation Regions <sup>a</sup>	
	No.	%	No.	%
Vikingland . . . . .	44	36	25	57
Heartland . . . . .	25	21	15	60
Arrowhead . . . . .	95	79	71	75
Pioneerland . . . . .	27	22	10	37
Hiawathaland . . . . .	47	39	24	51
Metro. . . . .	61	50	60	98

Source: Twin Cities sample.

<sup>a</sup>Based only on those respondents who stated they were familiar with the name of the particular vacation region.

percentage of respondents who were familiar with and could correctly identify these regions.

The most familiar vacationland is Arrowhead, with 79 per cent of the respondents indicating that they had heard of the region. Within this group indicating familiarity with the name, 75 per cent correctly identified the Arrowhead region on a map. Fewer were familiar with the Metro region, but of those who were, 98 per cent correctly located this region.

Arrowhead is better known because it has been a functional state region far longer than the others and it is identified with a formal group--the Minnesota Arrowhead Association. The Metro region is fairly obvious, which accounts for the high percentage of those correctly locating it. The remaining four areas are considerably less familiar and much harder to identify.

#### Advertising Appeals

Each respondent in the Twin Cities sample was questioned in detail about one of four ads the State had used in its magazine promotion. The respondents were asked what went through their minds as they read the ads, what the ad made them want to do, and what was the general theme of the ad they read. Approximately forty respondents were questioned for each of three ads: (1) Don't Eat the Scenery, (2) Bad Skiing Season, and (3) Top of the Map.<sup>1</sup> The purpose of the questions was to qualitatively assess if the ads were conveying the impression or meaning that they were designed to convey.

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<sup>1</sup>The fourth ad, Light Is Going Fast, was not tested because it appeared only once in a specialized magazine, Popular Photography.

Analysis of the respondents' answers cannot be easily quantified. However, the responses to each of the ads were very diverse. For example, Don't Eat the Scenery gave the following responses:

1. "The fishing and scenery. Nice weather; I saw the moon. Sort of relaxing."
2. "It's not all the truth. It mentions everything clean and fresh. It's a little exaggerated."
3. "It brought out that fruits, vegetables, and grain are raised here. We are a State rich in those items."

Thus, the first response was clearly a favorable one, the second was neutral, and the third demonstrates that the reader missed the point of the ad. In general, the answers to questions about the individual ads were variable enough to suggest that more extensive pre-testing of the individual advertisements would be useful to assure they communicate the right messages.

#### Advertising Media

The twin problems of (1) initially selecting the right media in which to advertise and (2) evaluating those media after the advertising appears are very difficult ones. Although a variety of techniques provides help for each problem, the present study will discuss only one technique in each area. To assist the State and its advertising agency in selecting magazines in the future to promote tourism, magazine readership--the percentage of a particular

group that reads the magazine--will be discussed. Because one way of evaluating the effectiveness of a magazine advertisement is by measuring coupon returns, this measure will also be discussed here.

The media schedule for the State of Minnesota's 1968 tourist advertising campaign in magazines is presented in Table 32. The campaign was divided between regional editions of the mass circulation consumer magazines (the "general consumer" class in the table plus TV Guide) and national coverage of special interest magazines (the "sports" class in the table plus Popular Photography). The regional editions vary by magazine but generally conform quite closely to the region identified as the Midwest in this study.

#### Media Readership

Table 33 shows the media readership of the Twin Cities sample, the Midwestern sample, and the national Gallup sample [14] of respondents who have vacationed in Minnesota or would like to in the future. In general, the results are consistent. The differences in the samples may be accounted for by different geographical areas covered and the methods used in selecting the sample.

The general consumer magazines consistently have high readership scores among present and prospective Minnesota vacationers. In particular, among the magazines the State used in 1968 for which data are available from all four sources Reader's Digest ranked first by a relatively wide margin, Life and Better Homes and Gardens alternated in second and third places, and Saturday Evening Post ranked fourth. In addition to the general magazines

TABLE 32

SCHEDULE FOR MINNESOTA TOURIST ADVERTISING IN MAGAZINES, 1968

Magazine	No. of Ads	Color	Coverage
<b>General Consumer</b>			
Better Homes & Gardens . . .	1	4 color	Regional
Ebony . . . . .	1	4 color	Regional
Holiday . . . . .	1	4 color	Regional
Life . . . . .	2	4 color	Regional
Reader's Digest . . . . .	1	4 color	Regional
Redbook . . . . .	2	4 color	Regional
Saturday Evening Post . . .	1	4 color	Regional
<b>Sports</b>			
Boating . . . . .	1	4 color	National
Camping Journal . . . . .	1	black & white	National
Field & Stream . . . . .	3	black & white	National
Flying . . . . .	1	4 color	National
Outdoor Life . . . . .	3	black & white	National
Sports Afield . . . . .	3	black & white	National
<b>Other</b>			
Popular Photography	1	4 color	National
TV Guide	8	black & white	Regional

Source: The Erle Savage Company.

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TABLE 33

PERCENTAGE OF RESPONDENTS FROM SELECTED SAMPLES WHO HAVE VACATIONED  
(OR WOULD LIKE TO) IN MINNESOTA AND WHO READ SELECTED MAGAZINES

Magazine	Twin Cities Sample	Midwestern Sample		Gallup Sample
		Minnesota and Wisconsin Destination	Minnesota Only Destination	
<b>Magazines in Minnesota's Advertising Schedule<sup>b</sup>:</b>				
Saturday Evening Post . . .	20%	18%	18%	23%
Better Homes & Gardens. . .	24	49	44	35
Holiday . . . . .	2	4	4	6
Life. . . . .	29	32	23	46
Reader's Digest . . . . .	42	66	61	57
Redbook . . . . .	8	17	26	N.A. <sup>a</sup>
Ebony . . . . .	... <sup>c</sup>	... <sup>c</sup>	... <sup>c</sup>	N.A.
TV Guide. . . . .	4	20	24	N.A.
Field and Stream. . . . .	8	13	12	N.A.
Outdoor Life. . . . .	9	11	13	N.A.
Sports Afield . . . . .	6 <sup>c</sup>	8 <sup>c</sup>	9	N.A.
Boating . . . . .	... <sup>c</sup>	... <sup>c</sup>	2	N.A.
Flying. . . . .	... <sup>c</sup>	1 <sup>c</sup>	1	N.A.
Popular Photography	1 <sup>c</sup>	... <sup>c</sup>	2	N.A.
Camping Journal	... <sup>c</sup>	1	2	N.A.
<b>Magazines Not in Minnesota's Advertising Schedule:</b>				
Look. . . . .	N.A.	16	9	41
McCall's. . . . .	N.A.	25	21	25
Good Housekeeping . . . . .	N.A.	19	14	30
National Geographic . . . . .	N.A.	20	15	14
Ladies Home Journal . . . . .	N.A.	30	35	20
Time. . . . .	N.A.	20	18	24

Sources: Twin Cities sample, Midwestern sample, Gallup sample [14] .

<sup>a</sup>N.A. = Not Available

<sup>b</sup>Magazine advertising schedule for 1968.

<sup>c</sup>Less than 0.5 per cent.

used in the 1968 media schedule, the State should consider Look, McCall's, Good Housekeeping, National Geographic, Ladies Home Journal, and Time, all of which show reasonably high readership scores.

In the sports magazines, lower readership scores can be justified since the magazines are distributed to a much smaller and more specialized population. However, the very low readership rates of Boating, Flying, Popular Photography, and Camping Journal would appear not to justify inclusion in future media schedules.

#### Coupon Returns

Between February 1 and July 25, 1968, Minnesota received about 20,000 coupon returns from its magazine advertisements. These were sent in to obtain more vacation information about the State. Table 34 shows how these coupons were distributed by state of residence of the coupon mailer and by magazine. Illinois and Indiana lead Minnesota in total coupons returned. In general, however, the coupon returns by state are distributed in about the same proportion as for states of origin of Minnesota vacationers.

The large number of coupons mailed by residents of states outside the Midwest for the sports magazines is because these magazines have only national editions so their advertising is seen throughout the nation. In contrast, regional editions of the general consumer magazines are available, and the purchase of Minnesota tourism advertising in these magazines was limited to the Midwest in 1968.

The eight advertisements placed in TV Guide from January through April,

TABLE 34

## SOURCES OF COUPON RETURNS FROM MINNESOTA'S MAGAZINE ADVERTISEMENTS, 1968

Magazine	Ad Description	Month of Issue	State of Residence													Material Sent Out					
			Minn.	Wis.	Mich.	N.D.	S.D.	Neb.	Kan.	Mo.	Is.	Ill.	Ind.	Ohio	Other	Total	Lure Book	Map	Camping Book	Fish Book	Fish Synopsis
General Consumer																					
Better Homes & Gardens Life	Don't Eat the Scenery	Feb.	453	206	4	33	14	76	77	129	198	424	38	4	75	1,731	X	X			
	Don't Eat the Scenery	Feb.	227	15	4	10	12	33	41	66	77	357	61	3	61	967	X	X			
Reader's Digest	Don't Eat the Scenery	Feb.	333	3	3	44	29	55	61	109	151	192	23	1	99	1,103	X	X			
Holiday	Don't Eat the Scenery	Mar.	51	38	74	2	1	9	15	27	19	110	56	92	127	621	X	X			
Life	Top of the Map	Mar.	145	27	0	9	11	40	49	91	72	327	56	1	53	881	X	X			
Better Homes & Gardens	Top of the Map	Mar.	220	302	5	25	21	57	90	133	162	539	26	7	51	1,638	X	X			
Redbook	Bad Skiing Season	Mar.	38	16	2	18	17	32	27	57	81	209	36	3	41	627	X	X			
Saturday Evening Post	Don't Eat the Scenery	Mar.	153	52	3	21	7	25	32	59	57	180	77	0	25	691	X	X			
Redbook	Don't Eat the Scenery	Apr.	158	13	2	11	10	22	34	46	53	124	21	5	30	529	X	X			
Ebony	Top of the Map	Apr.	3	1	4	0	0	0	0	3	0	8	7	3	5	34	X	X			
Sub-Total			1,831	673	101	173	122	349	426	720	870	2,470	401	119	567	8,822					
Sports																					
Outdoor Life	Poach-a-Pike <sup>a</sup>	Feb.	122	87	116	17	14	36	31	52	97	252	113	164	515	1,616	X	X		X	X
Field & Stream	Poach-a-Pike <sup>a</sup>	Feb.	61	49	93	9	9	16	14	32	54	159	76	100	414	1,086	X	X		X	X
Sports Afield	Poach-a-Pike <sup>a</sup>	Feb.	67	45	49	10	1	15	16	22	36	168	74	67	245	815	X	X		X	X
Camping Journal	George B. Kaiser <sup>a</sup>	Feb.	11	23	35	7	3	3	5	15	16	49	23	43	204	437	X	X	X	X	X
Boating	Huck Finn <sup>a</sup>	Mar.	3	1	7	0	0	0	1	1	1	4	1	4	31	54	X	X			
Flying	Longest Fly-In <sup>a</sup>	Apr.	N.A. <sup>c</sup>	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.					
Sub-Total			264	205	300	43	27	70	67	122	204	632	287	378	1,409	4,008					
Other																					
TV Guide	Tube-Watchers Arise <sup>a</sup>	Jan.-Apr. <sup>b</sup>	99	732	99	180	54	277	450	433	857	2,003	1,740	68	70	7,062	X	X			
Popular Photography	Light is Going Fast	Mar.	4	8	20	0	1	1	0	9	3	10	7	6	143	212	X	X			
Sub-Total			103	740	119	180	55	278	450	442	860	2,013	1,747	74	213	7,274					
Grand Total			2,198	1,618	520	396	204	697	943	1,284	1,934	5,115	2,435	571	2,189	20,104					

Sources: Minnesota Department of Economic Development and The Erle Savage Company.

<sup>a</sup>Names developed by The Erle Savage Company to identify individual ads in special interest magazines. The other ads are identified in Figure 10.<sup>b</sup>Returns from eight ads placed in thirteen regional editions.<sup>c</sup>Not available.

1968, generated 7,062 coupons, which was the highest total from any single magazine. Among the general consumer magazines, Better Homes and Gardens, Reader's Digest, and Life gave the highest coupon returns. Among the sports magazines Outdoor Life, Field and Stream, and Sports Afield ranked first, second, and third, respectively.

A mail questionnaire was sent to 1,000 of the coupon mailers asking, among other things, if they had vacationed in Minnesota. Table 35 shows the number and percentage of those who vacationed in Minnesota after receiving the tourist information sent by the State. Returns from individual magazines were too few in number to be meaningful, so the data are grouped into three major classes: general consumer magazines, sports oriented magazines, and a special interest magazine (TV Guide).

These tables raise two points which deserve further elaboration. First, there is considerable variation in the ability of different magazines to attract coupon returns. Some magazines do two to three times better than others. These differential rates of returns might be used as a crude measurement of the effectiveness of the various magazines. Secondly, the percentage of respondents who actually vacationed in Minnesota is a very important measurement of the effectiveness of the media schedule. The percentage of people who sent in coupons from general consumer or sports magazines and vacationed in Minnesota is approximately twice the percentage of those who sent in coupons from TV Guide and vacationed in Minnesota (see Table 35).

However, analysis of coupon returns must be interpreted with caution. Advertising has many objectives, only one of which is to maximize the number

TABLE 35  
RELATION BETWEEN COUPON RETURNS AND MINNESOTA VACATIONS

Magazine Classification	Vacationed in Minnesota		Did Not Vacation in Minnesota		Total	
	No.	%	No.	%	No.	%
General consumer. . .	76	45	93	55	169	100
Sports <sup>a</sup> . . . . .	38	50	38	50	76	100
TV Guide . . . . .	14	24	45	76	59	100
Total . . . . .	128	42	176	58	304	100

Source: Coupon sample.

<sup>a</sup>Advertisements in sports magazines were in national editions. However, the sample of coupon mailers was drawn only from Midwestern residents.

of coupon returns. According to The Erle Savage Company, the primary objective of the State's promotional campaign is to enhance Minnesota's image in the minds of the primary market target; encouraging coupon returns is a secondary objective.

#### Direct Mail Promotion

The State may be missing its sales opportunities with respect to the quality of information mailed in response to inquiries. Most inquirers are expecting an abundance of information about a variety of activities, but-- as shown in Table 34--receive only a map and a general "lure book." Although helpful to most inquirers, the information is not detailed enough to enable the potential tourist to decide on specific vacations in Minnesota. Under the present set-up, a potential tourist whose appetite for a Minnesota vacation is first whetted by seeing one of the State's magazine advertisements must go through four distinct steps to arrange his Minnesota vacation:

1. Clip and mail the magazine coupon to the State to get general information in a lure book about the various regions in Minnesota in which to vacation. In the lure book is a post card on which he may check the vacation regions of greatest interest to him.
2. Mail the post card to the State, which, in turn, forwards it to the pertinent vacation region. That region then sends the coupon mailer information on the resorts, cabins, campgrounds, and other facilities in the region, but this material sometimes omits specific information on current prices.

3. Write a letter to a particular resort or other facility to get specific information about prices, meal plans, and facilities.
4. Make reservations at a particular resort or other facility.

This laborious procedure certainly discourages many potential Minnesota vacationers, particularly since other states do a better job of initially disseminating specific information. Both Wisconsin and Michigan have procedures whereby the number of steps is reduced to three.

It is possible to develop a procedure which would reduce the number of steps for the consumer to only two. Under the proposed procedure, the coupon in the initial State advertisement would contain a checklist on which the coupon mailer could indicate his preferences for region, activities, and type and price of accommodations. The State would return the lure book, a map, general information about the region(s), a calendar of events, and license information.<sup>1</sup> At the same time, the State would mail the coupon information to the appropriate region(s), which, in turn, would send specific information to the coupon mailer. Armed with this specific information from both the State and the region, the potential vacationer needs to take only one more step--sending in his reservation.

#### Conclusions

The principal conclusions from the section are listed below:

- Minnesota spends less than Wisconsin and Michigan on advertising in measured media.

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<sup>1</sup>Some other states presently give the calendar of events and license information to all coupon mailers. Some coupon mailers in this study indicated that this information was highly desirable.

- Awareness of Minnesota advertising is relatively low.
  1. Fewer than one third of the Midwesterners vacationing in the Lake States recall seeing a Minnesota ad.
  2. Fewer than one fourth of the Target sample recall seeing a Minnesota ad.
- Of the six vacation regions in Minnesota, people are most familiar with Arrowhead, but a greater percentage of the people who are familiar with the areas can correctly locate the Metro area.
- Recent advertisements had significant variations in communicating their message effectively to the reader.
- There is great variation among individual magazines in (1) magazine readership and (2) ability to generate coupon returns.
- Approximately twice as many coupon mailers from general consumer and sports magazines as from TV Guide actually vacation in Minnesota.
- The present procedure for sending information to coupon mailers requires the potential Minnesota vacationer to take too many steps to secure specific information.

## 8. RECOMMENDATIONS

Sections 5 through 7 analyzed the Minnesota tourist, how vacation decisions are made, favorable and unfavorable aspects of vacationing in Minnesota, and advertising. Although these four topics have been discussed separately, they are highly interrelated and are the basis of the recommendations presented in this section. The recommendations are divided into three categories:

- Recommendations for improving the advertising and promotion of Minnesota tourism.
- Recommendations for improving the product offering that the State provides to the potential Minnesota vacationer.
- Recommendations for future research.

### Improving Advertising and Promotion

The recommendations for improving the State's advertising and promotion of tourism are divided into three areas: level of expenditures, media advertising, and direct mail advertising.

#### Level of Promotional Expenditures

Sections 6 and 7 showed that (1) the greater the familiarity of a potential tourist with Minnesota as a vacation area, the greater the likelihood of his vacationing here in the future; (2) the greater an individual's awareness

of Minnesota's vacation advertising, the more likely his future plans are to include a Minnesota vacation; (3) there is presently a low level of awareness of Minnesota tourist advertising; and (4) Minnesota's current level of promotional expenditures in measured media is lower than the levels of Michigan and Wisconsin--Minnesota's two Lake States competitors.

- Recommendation: Given that the State wishes to expand its tourist and travel industry, Minnesota should increase its budget for attracting more vacationers.

#### Media Advertising

Media Appeals. Analysis of recent Minnesota tourist advertisements showed that there was a significant variation in the effectiveness with which the advertising message was communicated to the reader. The messages should inform the reader about Minnesota and persuade him to consider the State as a vacation area.

- Recommendation: Future advertising campaigns should be pretested for communication effectiveness before being submitted to the mass media.

Minnesota has a favorable vacation image for scenery, water activities, and fishing but a less favorable one for sightseeing. The apparent contradiction between good scenery and poor sightseeing arises because sightseeing is a broad category to vacationers--besides scenery, it includes historical sites, man-made wonders, local pageants, and entertainment and nightlife. Generally, vacationers come to Minnesota to see lake and forest scenery and

to participate in water-related activities such as fishing and swimming. Tourists will not travel hundreds of miles to see the State's sights, whereas they will travel even thousands of miles to see national sights--Valley Forge, the Grand Canyon, or New York plays. Thus, although Minnesota cannot compete in the category of national sights, the State's sightseeing attractions--properly promoted--for many tourists will provide the little "extra" that can be coupled with Minnesota's lakes to give a pleasant vacation.

- Recommendation: The basic appeals stressed in individual advertisements should be fishing, water activities, and scenery. The State should promote meaningful sightseeing attractions to a greater extent, in ways that will be discussed in the section on product improvements. The State should also add to its initial literature sent to coupon mailers a listing of these attractions, including the dates of local fairs, festivals, and so on.

Market Segments. About 90 per cent of all Minnesota vacationers reside in the Midwestern states. Within the Midwest advertising awareness and familiarity with Minnesota as a vacation area is relatively low.

- Recommendation: Continue the concentration of advertising efforts in the Midwestern market, excluding Ohio. The Ohio market is too far east and too close to the vacation areas of Michigan, New York, and Pennsylvania to warrant the purchase of regional magazine advertising.

Even within this geographic area, the potential for Minnesota vacations varies. This has implications for advertising appeals used, the promotional

approach chosen (for example, magazine advertising as opposed to a vacation trade show), and the timing of promotion. For example,

1. Minnesota as a source of tourists is important because (a) 40 to 50 per cent of vacations in the State are taken by Minnesota residents, and (b) through word-of-mouth advertising, Minnesota residents can be of considerable value in attracting friends and relatives to the State for vacation purposes.
2. The Dakotas, Iowa, Kansas, and Nebraska are important markets because the residents of those states have few alternatives in lake-vacation areas.
3. Illinois, Indiana, and Missouri are important markets (even though they have more lake-vacation alternatives) because these states are so populous.

Besides geographical segmentation, certain economic and demographic segments have far more potential than others.

- Recommendation: Advertising media and appeals should be directed at tourists with the following characteristics:
  1. The younger age group (under 40), which the study shows to be the age group most likely to be future Minnesota vacationers. Additionally, the high proportion of repeat vacationers among the State's tourists suggests that getting these younger families here once will increase the chance of their vacationing here again.

2. The higher income vacationers, since they take more vacations per year and spend more money per vacation than lower income vacationers, thereby generating more income and employment in the State's tourism industry.
3. The craftsman-foreman occupational group, since it is the largest vacationing occupational group, and the professional, technical, and managerial groups, since a larger proportion of them vacation. Additionally, the latter group is probably more affluent, which makes them more desirable as Minnesota vacationers--but also more likely to have the financial means to vacation in California, Florida, or abroad.
4. The transit group of vacationers who are simply driving through Minnesota on the way to another state. Providing informative brochures about the State's vacation offerings when the transit family stops at a wayside or tourist information booth may convert the family to one that stays here on a future vacation.

Media Scheduling. Section 5 pointed out that the time horizon for planning vacations is very broad. Many tourists plan their summer vacation before January. About one quarter of the vacationers begin the planning process in the January-April time period, almost one quarter plan in May, and another quarter begin planning their vacations in June. Finally, a large segment are "late planners" and don't start until after July 1. The State's promotional schedule is presently concentrated in February, March, and April.

Although this is an important period for many vacationers, it precedes the planning period for the majority of Minnesota tourists.

- Recommendation: In future advertising campaigns, the State should use a promotion schedule that covers the months of February through June.

However, there are still two groups of vacationers that the timing of this promotion schedule may miss: (1) the "late planners" who normally don't plan until the last minute and (2) the "changers"--families whose original vacation plans change but who vacation anyway.

- Recommendation: The State should use newspaper ads or radio or television spot advertisements in major cities in or near Minnesota to attract the tourists whose summer vacation decisions are being made in July or August. When Minnesota resorts or cottages have surplus accommodations, these advertisements might be run before weekends to promote "long weekend" vacation packages of three or four days' duration.

Selecting Specific Media. As stated in Section 7, it is very difficult to evaluate a media schedule because of the many factors which must be considered in structuring such a schedule. However, it is suggested that the State and the advertising agency consider the following in developing the appropriate schedule:

1. The important potential market segments that were outlined earlier in this section.

2. Family role structure in vacation decisions. The study reveals that husbands play a greater role in the decision-making process than has been previously assumed suggesting that the media schedule should include more publications with higher male readership.
3. The magazine readership data provided in Section 7 that relates participation or interest in a Minnesota vacation to magazines read.

Media Evaluation Criteria. A questionnaire was sent to a sample of potential vacationers who clipped and mailed in a coupon appearing in a magazine advertisement promoting Minnesota vacations. Over 40 per cent of the sample returning the questionnaires actually vacationed in Minnesota. Thus, coupon returns are important in generating interest in Minnesota vacations.

- Recommendation: Increasing the number of coupon returns should become a primary objective of the State's promotional campaign.

Analysis of the coupon returns indicates considerable variation in the ability of individual magazines to elicit coupon returns. Likewise, there is considerable variation in advertising costs in the different magazines.

- Recommendation: The State should use advertising cost per coupon return as an important criterion in evaluating the media schedule.

#### Direct Mail Promotion

Section 7 showed that a prospective tourist who sees a magazine advertisement about Minnesota vacations may have to take four separate steps

to obtain reservations for private overnight accommodations. This procedure probably discourages many potential Minnesota vacationers.

- Recommendation: The Minnesota Department of Economic Development and related regional agencies should reduce the number of steps the magazine reader must take to obtain information and reservations. This can be accomplished by providing a more detailed checklist in the magazine coupon--or preferably in a tear-out post card insert adjacent to the magazine advertisement--and sending out more detailed information in the initial mailing.

Minnesota vacationers--even those who live outside the State--are very loyal and return to the State--often to the specific location--on a regular basis. For example, half of a sample of Midwesterners from outside Minnesota who vacationed here in 1968 said that they would definitely return again, and another one fourth said they probably would return. Word-of-mouth advertising from satisfied tourists is important; most people who take vacations talk to their friends and neighbors about them. The problem is (1) to assist these satisfied vacationers in becoming salesmen for the State and (2) to make it easy for them to return.

- Recommendation: The State should consider mailing copies of current Minnesota fishing regulations and a simplified accommodations checklist to those who bought a fishing license the previous year. The same could be done for hunting licenses. Also, private operators should be encouraged to send follow-up thank you notes, holiday greetings, or reminders to their previous customers if they do not already do so.

### Product Improvements

Recommendations for product improvement are based upon measures of what tourists believe to be true about vacationing in Minnesota, not necessarily upon what are actually product strengths or weaknesses.

### Overnight Accommodations

Vacationers in both the Midwestern sample and the Twin Cities sample believed the quality of resorts and lodges in Minnesota to be very good. However, facilities at camping areas are considered inadequate. Minnesota ranks below Wisconsin in this respect.

- Recommendation: Minnesota should investigate the adequacy of State-operated campgrounds and encourage private campground owners to do likewise.

### Access Facilities

Adequacy of waysides is probably the greatest deficiency of Minnesota's "product" which can be improved with State action. Minnesota has too few waysides and those it has are lacking the essential facilities of good waysides--restrooms and picnic tables.

- Recommendation: The State (1) should establish additional waysides throughout the State and (2) should improve existing ones by adding restrooms and picnic tables.

Although many tourists felt local access roads to tourist areas are poor, the problem is rarely so serious as to affect the vacationer's enjoying or not enjoying his vacation.

### Tourist Information Booths

Tourists on vacation want up-to-date information about what to see in the area. Although the helpfulness of personnel at tourist information booths earns a "good" rating, vacationers feel that the number of tourist information booths should be increased and their location should be identified better by local signs.

- Recommendation: The State should provide tourist information booths on heavily traveled highways. Also, it should encourage tourist-oriented communities to do the same. Where feasible, the State's tourist information booths should be located at waysides on major vacation routes; literature should be available on a 24-hour per day basis at these sites.

### Sightseeing

As noted above, sightseeing is difficult to assess because it means different things to various people. In any case, Minnesota's sightseeing image needs to be improved among both its residents and those of other Mid-western states. With the possible exception of lake and forest scenery, tourists do not come any distance to Minnesota to "sightsee" because, generally, the State has few nationally famous attractions. However, the local sights can be the plus factor that makes a lake-oriented vacation more enjoyable. Thus, the State and vacation regions should continue their efforts to identify and promote meaningful attractions.

The present study evaluated four vacation ideas that might be sight-seeing attractions for adult vacationers. Midwesterners were most interested in a Winter Wonderland idea that built upon a skiing theme. Two other concepts--a Twin Cities Package and Historical-Cultural Tour of Minnesota--were also appealing, but a Farm Vacation lacked great appeal.

One of the major suggestions by past tourists for improving Minnesota as a vacation area is expansion of adult entertainment and activities. Although the development of facilities to solve this problem is ultimately up to private investors, the State does play an important role. To encourage private expansion of entertainment facilities for adults, consideration might be given to restructuring municipal liquor laws, extending seasonal liquor licenses, and re-examining costs of liquor licenses (both seasonal and year round).

#### Participation Activities

The present study indicates that Minnesota rates very well on most participation activities, particularly fishing. The State should maintain this favorable image by continuing its programs to provide vacationers with adequate fishing. Lake pollution and insect control are potentially serious problems and are of concern to tourists. These problems do not constitute an immediate crisis, but in time they may erode the foundation of the Minnesota tourist business. These problems warrant further State attention.

### Future Research

The travel and tourist market is a dynamic one. With increasing affluence, a changing population structure in terms of age, and increased leisure time, what is desired from a vacation will continue to change. It is important that Minnesota continue research on the tourist market so that the State's product and promotional programs remain current. Although major research projects need be undertaken only every five to ten years, smaller studies aimed at answering specific questions should be undertaken more frequently. Two approaches to such studies are discussed below.

### Survey Research

Survey research studies--asking direct questions of a sample of present or potential Minnesota vacationers--can provide answers to specific questions at reasonable cost. This is especially true when questions are straightforward and samples can be selected and surveyed without great difficulty. For example, the State can and should determine if the tourist information it sends to coupon mailers is useful and how it can be improved; this can be done by sending a simple questionnaire to a sample of the coupon mailers.

Copies of the questionnaires used in the present study have been given to the State. Although these forms may be modified or improved, the use of similar questions on analagous samples in the future has two distinct advantages. First, the cost of designing and pretesting the questionnaires is reduced significantly. Second, changes or trends may be identified because a recent benchmark now exists.

Simple Field Experiments

Field experiments have become an increasingly common method of solving marketing problems in recent years. For example, it was suggested above that a tear-out post card adjacent to Minnesota magazine advertisements might generate significantly more inquiries than a similar coupon request that was part of the advertisement. In theory, the greater convenience of the post card might generate more than enough inquiries to offset its greater cost. This idea can be tested easily through a simple field experiment that uses two matched samples of subscribers to the same magazine. In one sample, the coupon would appear in the advertisement itself, and in the other, as a post card adjacent to the advertisement. Actual coupon returns can be compared with costs to evaluate the procedure. Similar field experiments can be developed to answer many of the State's promotional and product questions.

Continuing evaluation and research on Minnesota's program to attract vacationers should enable the State to initiate and maintain promotional and product improvements to provide continued growth in the State's tourist industry.

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