

# Chisago County Lodging Study

**An analysis of the accommodations market in Chisago County, MN**

Presented by Ryan Pesch

Sponsored by the Chisago County EDA

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**May 20, 2012**

Presented by Ryan Pesch, Extension Educator, University of Minnesota

**Report Reviewers:**

Ingrid Schneider, Director, University of Minnesota Tourism Center  
Dan Erkkila, Tourism Specialist and Professor, University of Minnesota Tourism Center

**Partners/Sponsors:**

Chris Eng and Deb Johnson , HRA-EDA, Chisago County  
Nick Entinger, Division of Parks and Trails, Minnesota Department of Natural Resources

A special thanks to all lodging and accommodations owner-operators who took the time to participate in the study.

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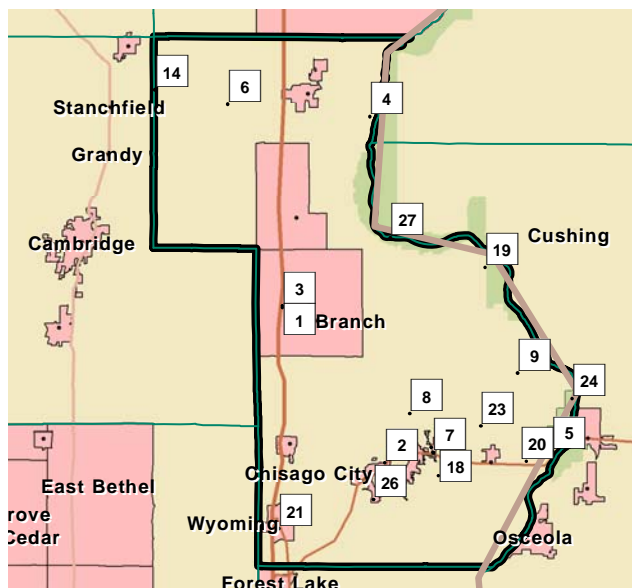
## BACKGROUND AND METHODOLOGY

The Chisago County EDA contracted with University of Minnesota Extension to conduct a market analysis in order to identify opportunities for local lodging start ups and expansions. The market analysis examined both the existing tourist base (demand) and the current lodging stock (supply) in the county. Extension used a number of methods to conduct the market analysis, including (1) surveying accommodation operators, (2) inventorying accommodations operating in 2012 from multiple data sources, and (3) mapping zip code data from overnight guests.

Survey results profiled the current stock of lodging facilities and accommodations in the county. The written survey asked accommodation owners or managers about the number and type of units or rooms, occupancy rates, types of customers, and views on tourism in Chisago County. Local occupancy rates were compared to benchmarks together with state sales tax data to measure the strength of accommodations in the county.

Customer zip code data from participating accommodations profiled the current tourist base according to their location and media usage. This customer profile provides value to existing lodging facilities which need information about where their customers are coming from and how to reach them.

Results from the study are available to local decision makers, interested parties, and citizens. This information can assist either public or private enterprises to identify lodging opportunities and can form as a base of information to conduct a feasibility analysis. This study is not a feasibility study of a single property development. The author intends for any and all parties interested in the development and health of accommodations in Chisago County to utilize these results.



## INVENTORY OF ACCOMMODATIONS IN CHISAGO COUNTY

Extension undertook an inventory of accommodations operating in Chisago County in early 2012. We identified 23 establishments through an investigation by multiple sources: InfoUSA (a national business database), Explore Minnesota website (statewide tourism association), and Google search. The Chisago EDA revised and verified this inventory based on local knowledge of the business community. Minnesota Department of Revenue sales tax records indicated 28

**Figure 1: Location of Accommodations (see Appendix 1 for corresponding names)**

establishments in the accommodations category in Chisago County in 2009, corroborating the accuracy of the inventory especially since a number of establishments only recently closed. Extension used the inventory to compile a mailing list to survey owners and operators about their establishments.

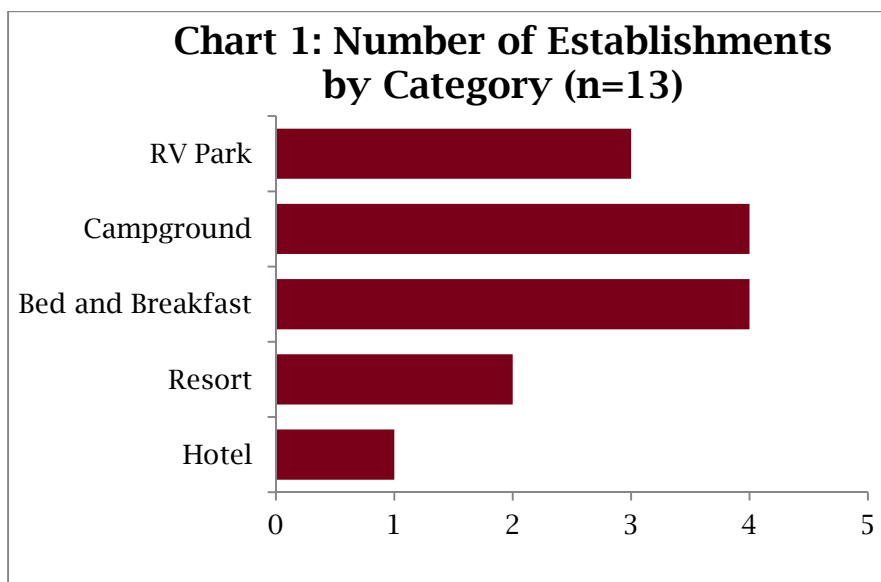
A complete list of accommodations by category is available in Appendix 1.

### **SURVEY OF ACCOMMODATIONS**

Extension used a modified Dilman method to survey accommodation operators in the county by mail. Establishments were mailed postcards soliciting their participation, followed by a cover letter with the survey instrument (Appendix 3) as well as a postcard reminder.

#### **Respondents**

Thirteen owner-operators responded to our mailed survey for a 57% response rate. Respondents were spread across a mix of categories:

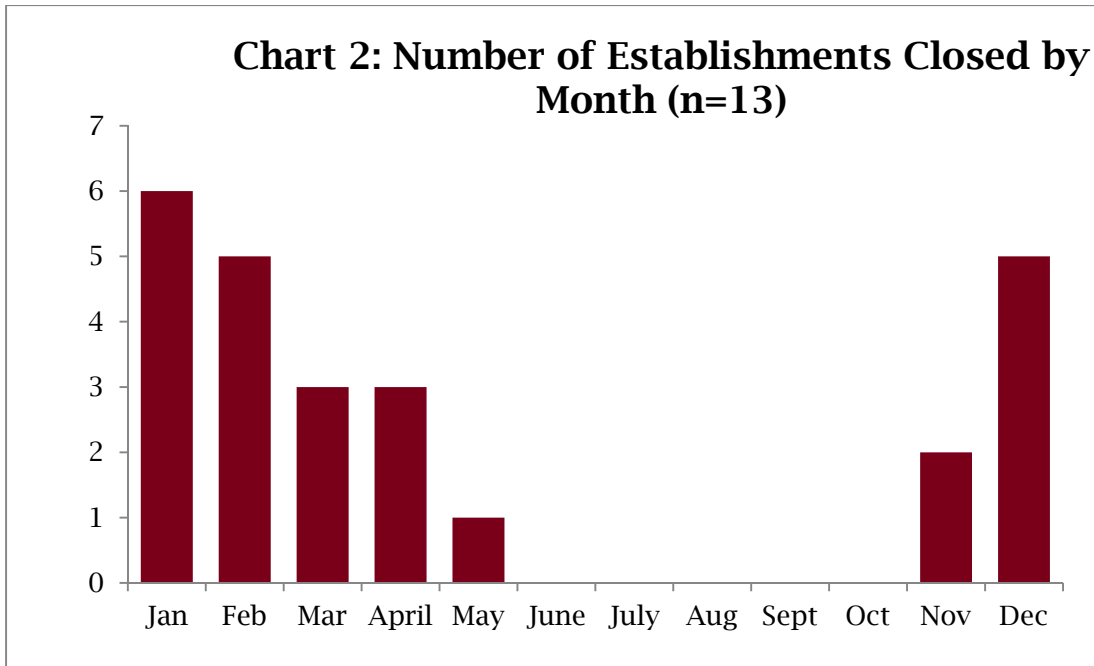


Respondents accounted for 626 units, either rooms or suites (hotels or B&Bs) or campsites/cabin (campgrounds or resorts). A sizable majority of units were campsites, especially those with hookups (Table 1).

**Table 1: Number of Units by Category Group**

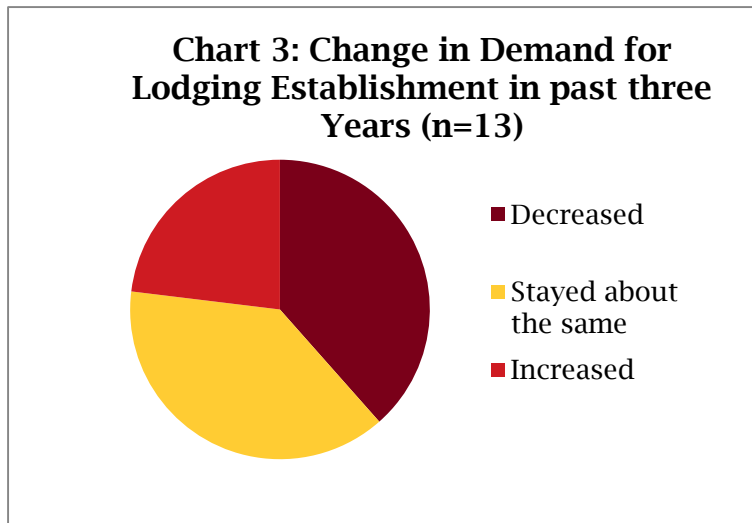
	Double	King	Suite	Campsites w/ hookup	Campsites w/o hookup	Cabins
Hotels/B&Bs	42	6	8	0	0	1
Campgrounds/RV/Resorts	0	0	0	357	197	18

A number of respondents indicated that their facilities are seasonal and closed for a portion of the year. Chisago County is not unlike other communities where accommodation facilities have a clear shoulder season:



Not unlike other accommodations establishments in Minnesota, respondents do not employ large workforces. Three respondents each have three full-time employees, whereas a majority of respondents employ part-time employees, ranging from 2 to 30 part-time employees. Five establishments indicated having no employees, but are operated by the owners themselves.

#### Changes in Demand



The survey asked two questions to measure demand for accommodations. When asked about the change in demand for their establishments in the past three years, about 20% of respondents answered “increased,” whereas the remainder split between “decreased” and “stayed about the same” (Chart 3).

Since renovations and expansions also indicate strong demand for services, the survey asked about plans for renovations in the next 12 months. Only a minority (30%) indicated they had plans to do so.

## Occupancy Analysis

Occupancy rates indicate how much visitors are utilizing and demanding the existing lodging stock. The lodging survey asked owner-operators about their occupancy rates by season. The survey also inquired about occupancy by weekday vs. weekend as these rates typically vary.

Since a number of establishments are seasonal, Extension calculated occupancy rates according to the total number of units available or open during each season (total number of units occupied divided by total number of units available).

**Table 2: Weekday Occupancy rates by Season**

	Spring (Mar-May)	Summer (June-Aug)	Fall (Sept-Nov)	Winter (Dec-Feb)
Average Available Units	394	629	558	248
Available Unit-nights	1183	1887	1675	745
<b>Hotels / B&amp;Bs</b>				
Average Occupancy Rate	44%	70%	63%	37%
Available Units	57	57	57	56
Average Price per Unit	\$ 129	\$ 138	\$ 138	\$ 129
<b>Private Campgrounds / RV Parks / Resorts</b>				
Average Occupancy Rate	15%	28%	13%	10%
Available Units	163	398	327	18
Average Price per Unit	\$ 33	\$ 34	\$ 33	\$ 33
<b>State Parks</b>				
Average Occupancy Rate	5%	39%	16%	4%
Available Units	174	174	174	174
Average Price per Unit	\$ 16	\$ 22	\$ 16	\$ 16

**Table 3: Weekend Occupancy Rates by Season**

	Spring (Mar-May)	Summer (June-Aug)	Fall (Sept-Nov)	Winter (Dec-Feb)
Average Available Units	394	629	558	248
Available Unit-nights	1183	1887	1675	745
<b>Hotels / B&amp;Bs</b>				
Average Occupancy Rate	45%	70%	64%	38%
Available Units	57	57	57	56
Average Price per Unit	\$ 129	\$ 138	\$ 138	\$ 129
<b>Campgrounds / RV Parks / Resorts</b>				
Average Occupancy Rate	60%	84%	40%	10%
Available Units	337	572	501	192
Average Price per Unit	\$ 29	\$ 35	\$ 29	\$ 29

State Parks				
Average Occupancy Rate	73%	100%	69%	15%
Available Units	174	174	174	174
Average Price per Unit	\$ 16	\$ 22	\$ 16	\$ 16

In general, the occupancy rate of all Chisago County accommodations was similar to accommodations in the Metro region, however, campground rates were higher in the off seasons than the regional average and hotel/B&B rates were lower. Regrettably, the most recent publically-available benchmark data for the Metro region is quite dated (Davidson-Peterson, 2008). However, this benchmark data was also collected during an economic boom, so allow for a conservative comparison.

**Table 4: Metro Region Occupancy Rates Compared to Average Chisago Occupancy Rates by Season**

	Spring (Mar-May)	Summer (June-Aug)	Fall (Sept-Nov)	Winter (Dec-Feb)
Hotels / B&Bs (Davidson-Peterson)	<b>65%</b>	<b>76%</b>	<b>70%</b>	<b>59%</b>
<i>Chisago Hotels/B&amp;Bs</i>	45%	70%	63%	37%
Campgrounds (Davidson-Peterson)	<b>21%</b>	<b>60%</b>	<b>21%</b>	<b>3%</b>
<i>Chisago Private Campgrounds</i>	28%	44%	21%	10%
<i>Chisago State Parks</i>	24%	57%	31%	7%

Sources: Davidson-Peterson, 2008 and Chisago County Accommodations Survey, 2012

The benchmark data for Minnesota's Central / West Region is also a good comparison since Chisago is in the northern part of the Metro region, although the pattern is much the same as the comparison with the Metro region. The occupancy rates of Chisago more closely followed the rates in the Central / West region as you see greater seasonality than compared to the Metro region.

**Table 5: Central / West Region Occupancy Rates Compared to Chisago Occupancy Rates by Season**

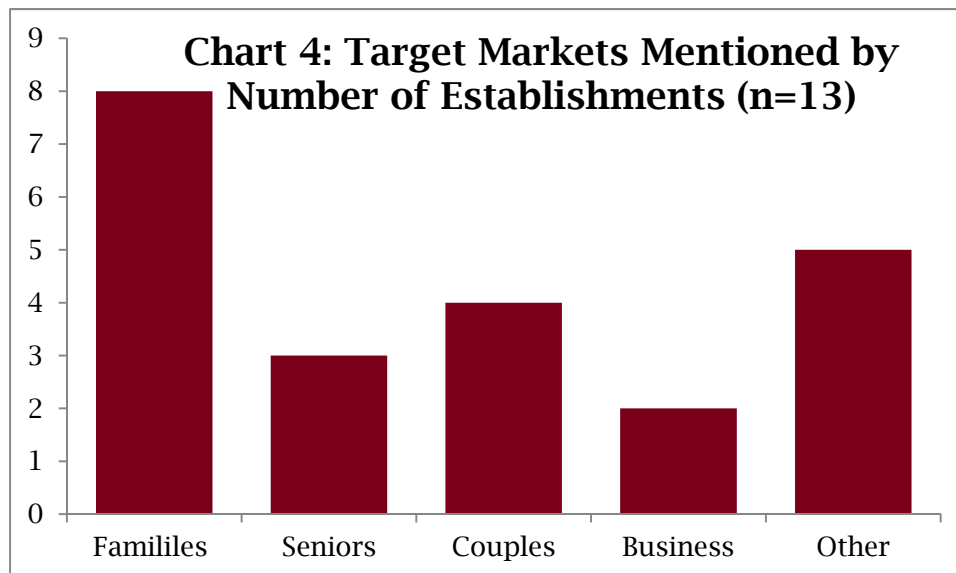
	Spring (Mar-May)	Summer (June-Aug)	Fall (Sept-Nov)	Winter (Dec-Feb)
Hotels / B&Bs (Davidson-Peterson)	<b>56%</b>	<b>74%</b>	<b>64%</b>	<b>56%</b>
<i>Chisago Hotels/B&amp;Bs</i>	45%	70%	63%	37%
Campgrounds (Davidson-Peterson)	<b>12%</b>	<b>53%</b>	<b>24%</b>	<b>2%</b>
<i>Chisago Private Campgrounds</i>	28%	44%	21%	10%
<i>Chisago State Parks</i>	24%	57%	31%	7%

Sources: Davidson-Peterson, 2008 and Chisago County Accommodations Survey, 2012

### Target market

Overnight visitors to Chisago County are clearly leisure travelers with families as a primary target market.





Ten of thirteen respondents estimated that between 97% and 100% of their guests are traveling for leisure. The survey also asked operators about their target market and a majority of respondents indicated “families” or

“families with children.” A mix of other target markets was mentioned as types of leisure travelers, including couples and seniors.

Also mentioned in the “other” category included: “anyone who wants to stay,” “young adults,” nature-lovers, hikers, skiers, etc.,” “leisure campers,” and “adults traveling for pleasure or business.”

#### **Other survey comments**

Lastly, the survey asked operators to provide any additional comments about how to improve tourism in Chisago County. Respondents gave a mix of suggestions:

- Encourage local businesses by keeping taxes lower and offering incentives to make improvements and expand offered services.
- Additional web-based, mobile-based marketing.
- By keeping the lakes clean and full of fish.
- More participation in promoting tourism in county as we are not primarily agricultural any more.
- Spend some dollars on advertising. Also, don't tell me the county supports small business and then tell me my property taxes will rise because I'm a business in Chisago County. I am bringing out-of-state visitors that help patronize numerous other small businesses in our county. I can't afford to stay in business if our taxes continue to rise.

#### **SALES TAX TRENDS**

Since sales tax data are good to identify the relative strengths of industries by community, Extension gathered sales tax statistics in accommodations (NAICS code

721) for Chisago County from 2003-2009 as well as corresponding statistics for neighboring counties.

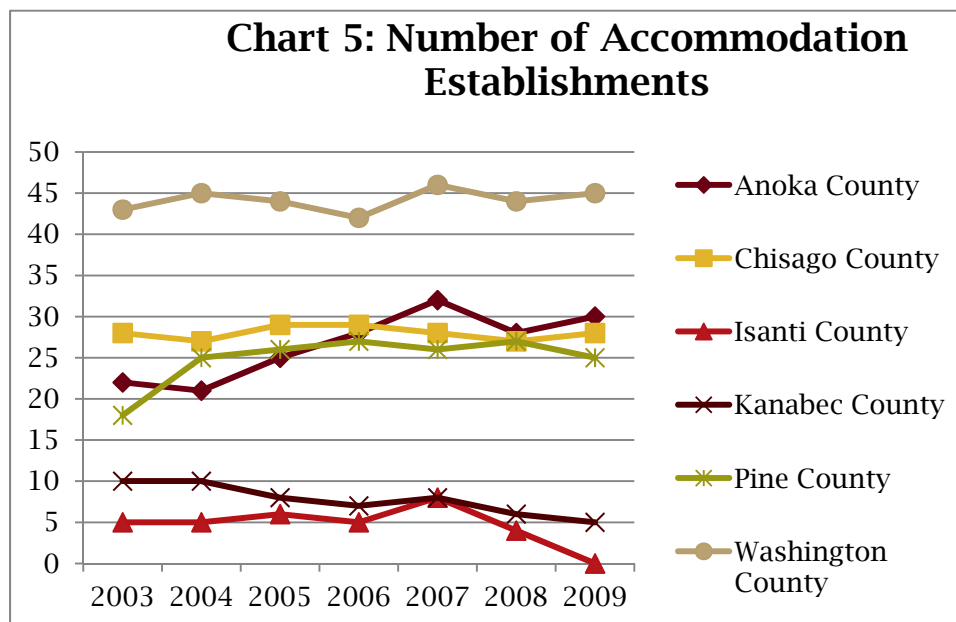
Chisago County sales tax statistics such as sales and number of establishments remained very stable through the 2000s (Table 6). Only recently has there been a dip in the number of establishments, and, although existing establishments typically take up demand for services, future sales tax data releases may show a corresponding drop in sales as well.

**Table 6: Chisago County Sales Tax Statistics, 2003-2009**

Chisago County Sales Tax Statistics for Accommodations (NAICS 721)			
	<i>Establishments</i>	<i>Taxable Sales</i>	<i>Gross Sales</i>
2003	28	\$ 2,465,693	\$ 3,111,444
2004	27	\$ 2,318,505	\$ 2,636,132
2005	29	\$ 2,296,559	\$ 2,657,522
2006	29	\$ 2,628,115	\$ 2,962,350
2007	28	\$ 2,847,379	\$ 3,254,113
2008	27	\$ 2,781,599	\$ 3,208,052
2009	28	\$ 2,604,810	\$ 2,992,400

Source: MN Department of Revenue, 2012

To give some context to these statistics, Extension gathered sales tax data for neighboring counties to identify whether Chisago County's accommodations sales were strong or weak in comparison. When examining number of accommodation establishments, Chisago is quite similar in size and stability to Anoka and Pine

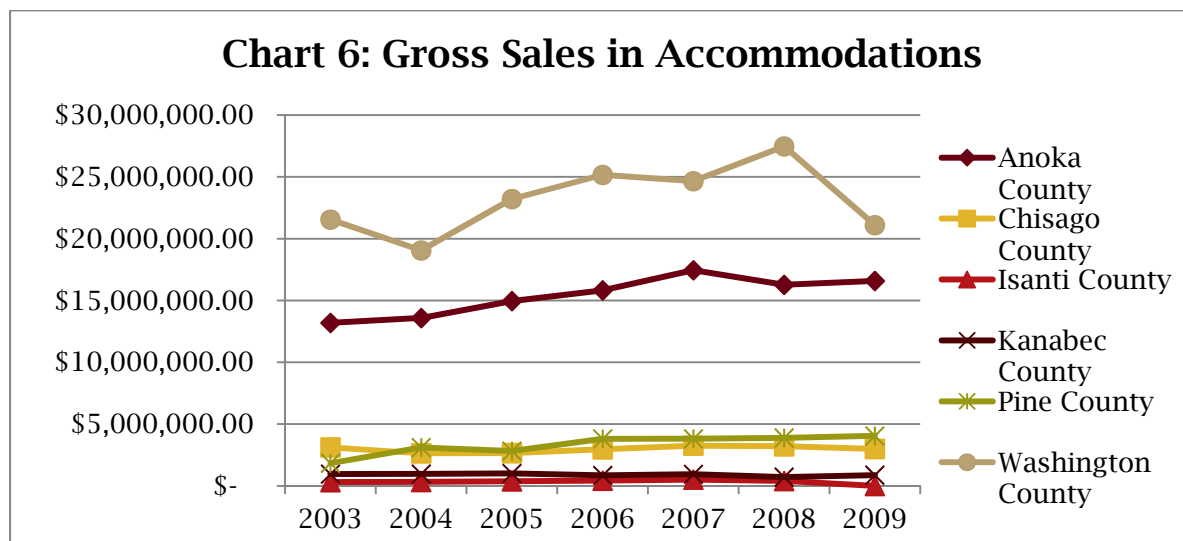


Counties. All these counties have 20-some establishments and are fairly stable from 2003-2009, although Anoka and Pine counties grew in number from 2003-2007. Kanabec and Isanti drop in size over the same time period.

Source: MN Department of Revenue, 2012

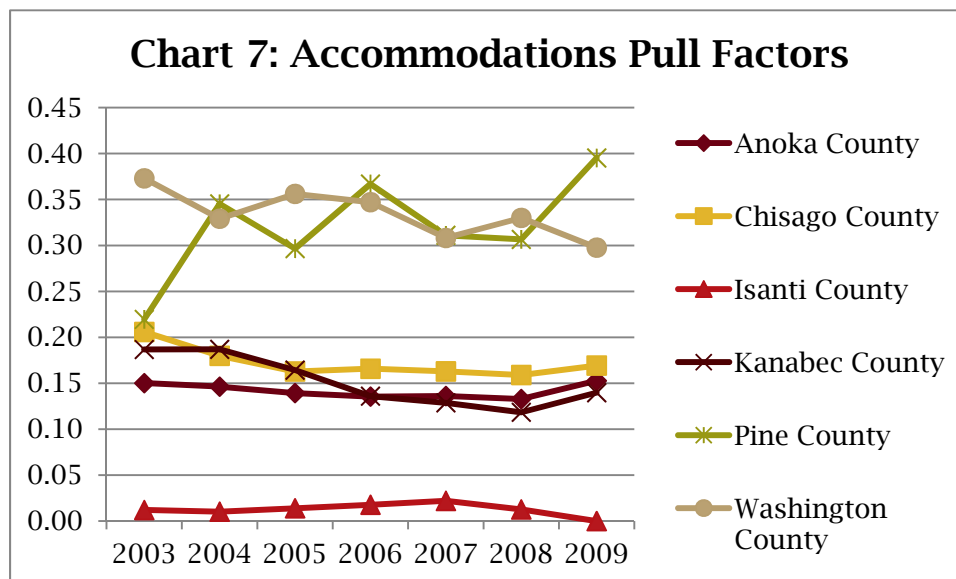
Gross sales were also constant in Chisago County between 2003-2009 and these figures indicate that the types of establishments in Chisago are small in comparison to

other counties. For example, Anoka and Chisago Counties have almost the same number of establishments in 2009 at 30 and 28 businesses respectively; however, the total gross sales in Anoka County are over five times the total sales in Chisago County. The mix of accommodation businesses in Pine County, on the other hand, is quite similar to Chisago.



Source: MN Department of Revenue, 2012

Another way to put these sales figures in accommodations into perspective is using a measure called a pull factor. Pull factors are good measures of sales activity because they reflect changes in population, inflation, and the state economy. They are simply the ratio of county taxable sales per person to the state average (taxable sales per person in Minnesota).



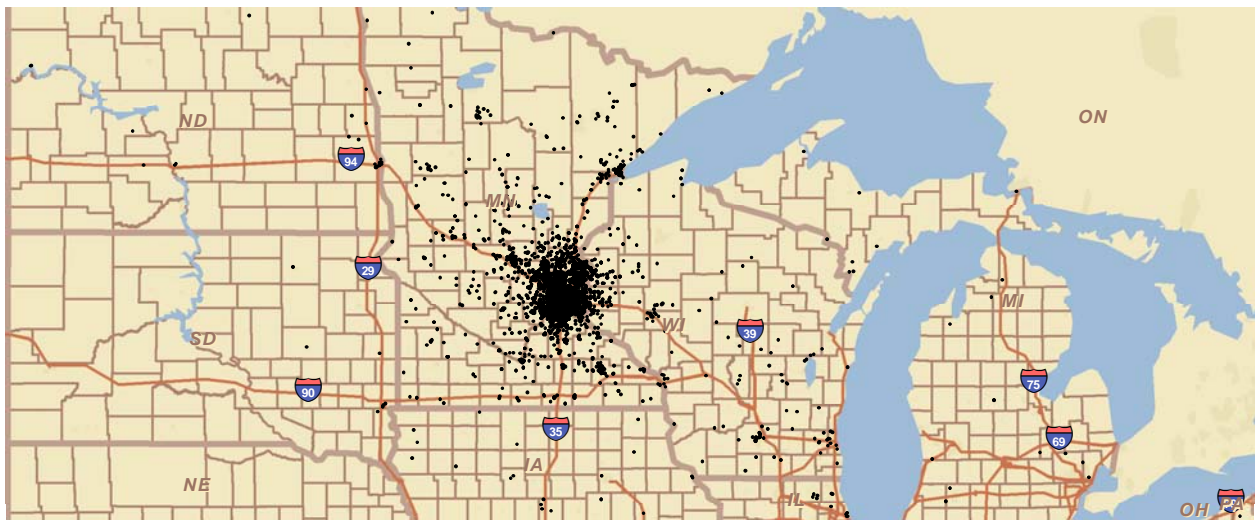
Any pull factor over 1.0 indicates that a county has sales higher than its proportion of the state's population and is "pulling in" sales. According to this measure, Chisago County and all its neighbors are net exporters in accommodations, where residents are spending

their accommodation dollars elsewhere and sales from outside the counties are not

offsetting the losses. In this measurement Pine County stands as a good comparison to Chisago County in that, although its sales and number of establishments are very similar, the Pine County pull factor in 2009 is over two times greater than Chisago County. Given the size of the county, Pine County accommodations are competing better than Chisago County accommodations.

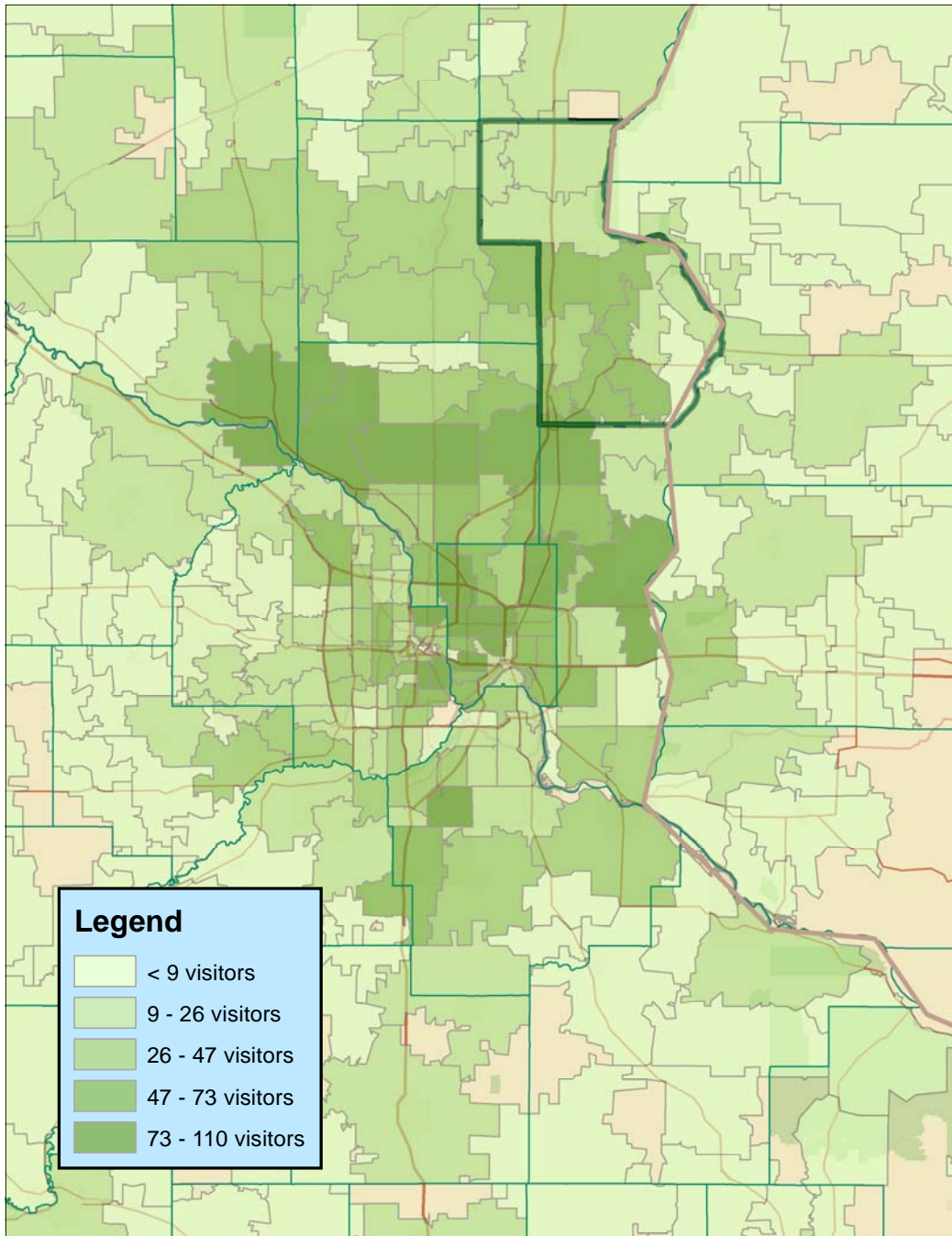
### **MARKET PROFILE OF CHISAGO VISITORS**

Extension used 6,694 visitor records from four participating properties to profile visitors to Chisago County. Each record included the zip code of a customer at a minimum, but the vast majority included a full address. Extension mapped the locations of all visitor records through a process called geocoding in GIS.



**Figure 2: Distribution of Visitors to Chisago County**

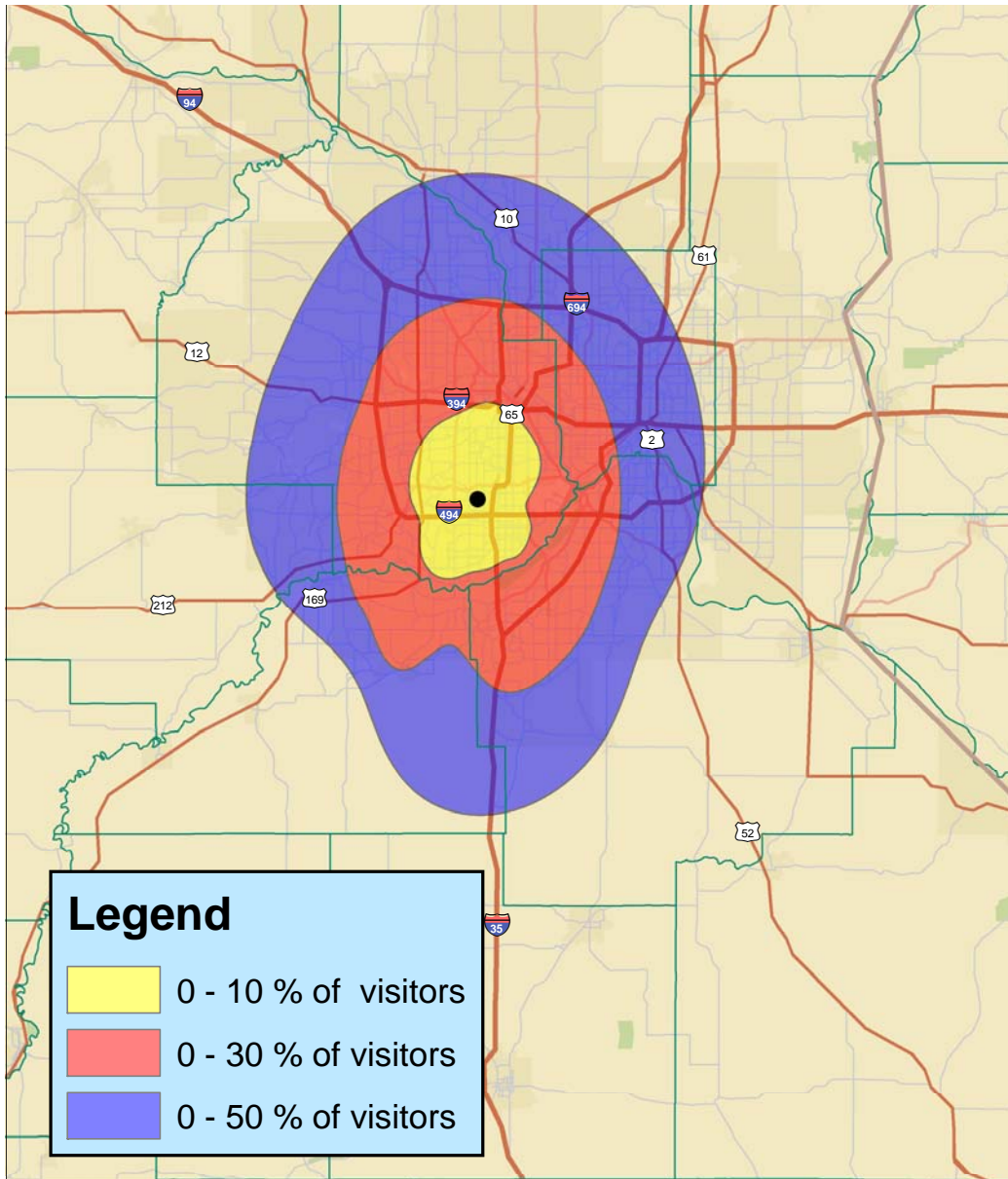
Although a simple mapping of the home locations of customers would indicate that customers come from far and wide, in truth, visitors to Chisago County are highly concentrated in Minnesota, and the Twin Cities metro in particular. Over 90% of visitors are from Minnesota (91%) and over 80% are from the Minneapolis-St. Paul metropolitan area (see Appendix 2 for details). Even in the MSP metropolitan area, there are pockets where greater numbers of visitors originate from. Looking at the figure below, a number of zip codes in the northern and eastern suburbs are home to large numbers of visitors.



**Figure 3: Number of Visitor Records by Zip Code**

In order to find where Chisago visitors are most concentrated, Extension found the center point of all visitor records and built a trade area from that center point, including rings of 10, 30, and 50% of the nearest customers from the center point. The center point for this analysis lies just north of 494 in Richfield.





**Figure 4: Trade Area Derived from Visitor Home Zip Codes**

The trade area where the first 30% of visitors are located was also the area used to profile the media usage (see Appendix 3 for details). We used 2010 data from Mediamark research to compile the media reports. These habits are derived from an ongoing, comprehensive study of the adult population of the United States called *The Survey of the American Consumer*. The survey is conducted by Mediamark Research, a national marketing firm. Conducted continuously since 1979, Mediamark surveys the demographics, product usage, and media exposure of all persons aged 18 and over in the contiguous 48 states. For more information, see <http://www.mediamark.com> and follow *The Survey of the American Consumer*.

## CONCLUSIONS

Market analysis results reinforce that Chisago County is a “short trip” destination of families and couples from the Twin Cities metro. This position in the tourist market may best explain its higher than average campground occupancy rates in the off season where Twin Cities residents will drive up for a short getaway (although natural amenities like fall colors also help to explain the strength). Still, metro residents may be choosing to bypass Chisago County for further-away locations for summer vacations; survey respondents indicate lower than average occupancy rates in summer.

Generally only a minority of Chisago County accommodations see strong growth in demand. Although a strong base of customers exists, there is real room to build greater demand and sales for existing accommodations as well as grow new accommodations. Sales tax data shows that Chisago is not competing as well against its neighboring counties like Pine County in number of establishments or pull factors. Chisago County has been losing establishments since 2000 and not increasing its share of accommodations sales. This may reflect a change in the marketplace as Chisago transitions to an exurban county from a rural county more attractive to visitors.

A promotional campaign or rebranding effort of Chisago County accommodations and attractions may be a good first step. Any development of new accommodations or renovations would only help reposition the county in the minds of visitors in promotional or rebranding efforts. The findings of this report will assist in targeting customers by preferred media. Clearly, however, some private and/or public intervention is necessary by to give the Chisago lodging and accommodations market renewed vigor.

## REFERENCES






Davidson Peterson Associates, The Economic Impact of Expenditures by Travelers on Minnesota’s Northcentral / West Region and the Profile of Travelers, June 2007–May 2008. Retrieved April 20, 2012 at <http://industry.exploreminnesota.com/wp-content/uploads/2009/01/2008-mn-northcentralwest-region-report-final.pdf>

Davidson Peterson Associates, The Economic Impact of Expenditures by Travelers on Minnesota’s Metro Region and the Profile of Travelers, June 2007–May 2008. Retrieved April 20, 2012 at <http://industry.exploreminnesota.com/wp-content/uploads/2009/01/2008-mn-metro-region-report-final-with-qnr.pdf>.

## APPENDIX 1: INVENTORY OF ACCOMMODATIONS IN CHISAGO COUNTY

ID	NAME	ADDRESS	CITY	STATE	ZIP	TYPE
1	AMERIC INN	38675 14TH AVE	NORTH BRANCH	MN	55056	MOTEL
2	AMERICAS BEST VALUE INN	11490 LAKE LN	CHISAGO CITY	MN	55013	MOTEL
3	CAMP SUNRISE	10809 495TH ST	RUSH CITY	MN	55069	CAMPGROUND
4	CAMP WAUB-O-JEEG	2185 CHISAGO ST	TAYLORS FALLS	MN	55084	CAMPGROUND
5	COTTAGE BED & BREAKFAST	950 FOX GLEN DR	TAYLORS FALLS	MN	55084	B&B
6	COUNTRY BED AND BREAKFAST	17038 320TH STREET	SHAHER	MN	55074	B&B
7	FLICKABIRDS RESORT	50155 CLOVER TRL	RUSH CITY	MN	55069	RESORT
8	GO-BOAT MOTEL & MARINA	516 GRAND AVE	CENTER CITY	MN	55012	MOTEL
9	HIGH WOODS BED AND BREAKFAST	35930 WILD MOUNTAIN RD	TAYLORS FALLS	MN	55084	B&B
10	HILLCREST RV PARK	32741 NORTH LAKES TRL	LINDSTROM	MN	55045	RV Park
11	INTERSTATE STATE PARK	307 MILLTOWN RD	TAYLORS FALLS	MN	55084	CAMPGROUND
12	OJIKETA REGIONAL PARK	27500 KIRBY AVE	CHISAGO CITY	MN	55013	CAMPGROUND
13	OLD JAIL CO BED & BREAKFAST	349 W GOVERNMENT ST	TAYLORS FALLS	MN	55084	B&B
14	ROSE HILL RESORT	30455 LEHIGH AVE	LINDSTROM	MN	55045	RESORT
15	RUSH LAKE RESORT & CAMPGROUNDS	51170 RUSH LAKE TRL	RUSH CITY	MN	55069	RESORT
16	RUSHMORE CAMPGROUNDS	555 510TH ST W	STANCHFIELD	MN	55080	RV Park
17	SOLEIT LEVANT B&B	42190 FERRY ROAD	NORTH BRANCH	MN	55032	B&B
18	SUMMIT INN BED & BREAKFAST	208 SUMMIT AVE	CENTER CITY	MN	55012	B&B
19	VALKOMMEN INN	12715 Lake Blvd	LINDSTROM	MN	55045	MOTEL
20	WANNIGAN POINT CABINS	150 MAPLE ST	TAYLORS FALLS	MN	55084	RESORT
21	WILD RIVER STATE PARK	39797 PARK TRL	CENTER CITY	MN	55012	CAMPGROUND
22	WILDWOOD CAMPGROUND	20078 LAKE BLVD	SHAHER	MN	55074	CAMPGROUND
23	WYOMING MOTEL	26237 FOREST BLVD	WYOMING	MN	55092	MOTEL



<p>The geographic summary displays the top 20 states, counties, ZIP Codes and MAs in rank order.</p> <p>A. 6,048 (90.70%) of your records are in the state of Minnesota (27).</p> <p>B. 1,772 (26.57%) of your records are in Hennepin County, MN county. The number after the county (27053) is county FIPS code.</p> <p>C. Records that cannot be matched at the designated level are noted at the bottom of each section.</p> <p>D. 110 (1.65%) of your records are in Minneapolis ZIP Code 55406. The top-ranked ZIP Code.</p> <p>E. In addition of the top 20 ZIP Codes, there are 5,014 'Other ZIP Codes' represented in your customer database (75.19% of all records).</p> <p>F. 5,352 (80.26%) of your records are located within the Minneapolis-St. Paul-Bloomington, MN-WI (33460) Metropolitan Area.</p>	<p><b>Top 20 States</b></p> <p>Name</p>		Count	Percent	<p><b>Top 20 ZIP Codes</b></p> <p>Name</p>		Count	Percent																																																																																																																																				
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## APPENDIX 3: MEDIA USE FOR CHISAGO VISITOR TRADE AREA

# Media and Internet Marketing Profile

Based on the mix of customer demographics and lifestyles in your trade area, we have knowledge of their media and internet habits from national marketing data. Below are some highlights of this information, although full information is compiled in the following pages.

	Number of adults	Percent of adults
<b><i>Newspaper Readership</i></b>		
Light newspaper reader	169801	17%
Light-medium newspaper reader	190161	19%
Medium newspaper reader	202097	21%
Medium-heavy newspaper reader	199111	20%
Heavy newspaper reader	213948	22%
Read any daily newspaper	445914	45%
Read one daily newspaper	355605	36%
Read two or more daily newspapers	90300	9%
Read any Sunday newspaper	542642	55%
<b><i>Radio Listenership</i></b>		
Light radio listener	188821	19%
Light-medium radio listener	201537	20%
Medium radio listener	210729	21%
Medium-heavy radio listener	196444	20%
Heavy radio listener	177522	18%
<b><i>Internet Habits</i></b>		
Have Access to Internet	861643	88%
Used Internet in last month	748464	76%
Used email in past month	681541	69%
Made purchase online, personal	354410	36%
Made purchase online,business	108912	11%
Made travel plans in past month	213152	22%
Obtained latest news in past month	429988	44%

**Source:** These data area based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by Mediamark Research Inc. in a nationally representative survey of US households.



# Market Potential: Media Read

30% of Chisago Visitors Trade Area

Total 2010 Adults: 983,254

Product/Consumer Behavior:	<i>Expected Number of Adults</i>	<i>Expected Percent of Adults</i>	<i>Expected Percent in MN</i>
<b>Newspaper readership:</b>			
Light newspaper reader	169801	17.3%	18.6%
Light-medium newspaper reader	190161	19.3%	19.5%
Medium newspaper reader	202097	20.6%	19.9%
Medium-heavy newspaper reader	199111	20.3%	20.6%
Heavy newspaper reader	213948	21.8%	20.4%
Read any daily newspaper	445914	45.4%	44.5%
Read one daily newspaper	355605	36.2%	36.0%
Read two or more daily newspapers	90300	9.2%	8.6%
Read any Sunday newspaper	542642	55.2%	54.0%
<b>Newspaper content:</b>			
Read newspaper: advertisements	235431	23.9%	21.7%
Read newspaper: business/finance section	283570	28.8%	26.4%
Read newspaper: circulars/inserts/fliers	187972	19.1%	16.8%
Read newspaper: classified section	241420	24.6%	27.8%
Read newspaper: comics	249344	25.4%	25.7%
Read newspaper: editorial page	246480	25.1%	25.0%
Read newspaper: entertainment/lifestyle section	315969	32.1%	29.6%
Read newspaper: fashion section	135157	13.7%	12.4%
Read newspaper: food/cooking section	247237	25.1%	24.5%
Read newspaper: main news/front page	604807	61.5%	60.6%
Read newspaper: health section	195726	19.9%	17.7%
Read newspaper: home/furnishings/gardening section	171456	17.4%	17.0%
Read newspaper: international/national news	178948	18.2%	17.8%
Read newspaper: local news section	559870	56.9%	57.3%
Read newspaper: movie listings/reviews section	235431	23.9%	21.7%
Read newspaper: science & technology section	187972	19.1%	16.8%
Read newspaper: sports section	362546	36.9%	36.2%
Read newspaper: travel section	195726	19.9%	17.7%
Read newspaper: TV listings section	178948	18.2%	17.8%

**Source:** These data area based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by Mediamark Research Inc. in a nationally representative survey of US households.



## Market Potential: Media Read

30% of Chisago Visitors Trade Area

Total 2010 Adults: 983,254

Product/Consumer Behavior:	<i>Expected Number of Adults</i>	<i>Expected Percent of Adults</i>	<i>Expected Percent in MN</i>
<b>Magazine readership:</b>			
Light magazine reader	156803	15.9%	17.9%
Light-medium magazine reader	184338	18.7%	20.6%
Medium magazine reader	203136	20.7%	20.5%
Medium-heavy magazine reader	210224	21.4%	20.2%
Heavy magazine reader	220677	22.4%	19.8%
<b>Magazine format:</b>			
Read airline magazines	77499	7.9%	6.2%
Read automotive magazines	117028	11.9%	12.3%
Read baby magazines	39832	4.1%	4.1%
Read boating magazines	22511	2.3%	2.2%
Read business/finance magazines	214130	21.8%	18.7%
Read computer magazines	50946	5.2%	4.2%
Read Epicurean magazines	99389	10.1%	8.7%
Read fishing/hunting magazines	91661	9.3%	12.9%
Read general editorial magazines	439710	44.7%	42.1%
Read health magazines	156702	15.9%	15.3%
Read home service magazines	329448	33.5%	34.6%
Read motorcycle magazines	32447	3.3%	3.4%
Read music magazines	108207	11.0%	9.5%
Read news and entertainment weekly	447064	45.5%	41.3%
Read parenthood magazines	119313	12.1%	12.2%
Read science/technology magazines	71108	7.2%	6.3%
Read sports magazines	176898	18.0%	16.0%
Read travel magazines	104846	10.7%	8.8%
Read women's fashion magazines	75315	7.7%	6.0%

**Source:** These data area based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by Mediamark Research Inc. in a nationally representative survey of US households.



## Market Potential: Media Listen

30% of Chisago Visitors Trade Area

Total 2010 Adults: 983,254

Product/Consumer Behavior:	<i>Expected Number of Adults</i>	<i>Expected Percent of Adults</i>	<i>Expected Percent in MN</i>
<b>Radio access:</b>			
Light radio listener	188821	19.2%	19.1%
Light-medium radio listener	201537	20.5%	20.1%
Medium radio listener	210729	21.4%	20.6%
Medium-heavy radio listener	196444	20.0%	19.8%
Heavy radio listener	177522	18.1%	19.6%
<b>Radio format listened to:</b>			
adult contemporary	189941	19.3%	19.2%
all news	58990	6.0%	4.2%
all talk	45451	4.6%	3.9%
alternative	99557	10.1%	8.2%
classic hits	44654	4.5%	4.9%
classic rock	99740	10.1%	11.1%
classical	42222	4.3%	3.2%
contemporary hit radio	178826	18.2%	16.8%
country	164717	16.8%	24.6%
gospel	19721	2.0%	2.3%
Hispanic	43690	4.4%	3.7%
jazz	52773	5.4%	3.9%
news/talk	139088	14.1%	13.2%
oldies	81657	8.3%	8.4%
public	48851	5.0%	3.9%
religious	60758	6.2%	6.8%
rock	121387	12.3%	11.8%
soft adult contemporary	57021	5.8%	5.2%
sports	59790	6.1%	5.1%
urban	130895	13.3%	11.1%
variety/other	106724	10.9%	9.5%

**Source:** These data area based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by Mediamark Research Inc. in a nationally representative survey of US households.



# Market Potential: Media Listen

30% of Chisago Visitors Trade Area

Total 2010 Adults: 983,254

<b>Product/Consumer Behavior:</b>	<b><i>Expected Number of Adults</i></b>	<b><i>Expected Percent of Adults</i></b>	<b><i>Expected Percent in MN</i></b>
<b>Radio programming listed to:</b>			
auto racing	54507	5.5%	7.0%
baseball playoffs/World Series	115778	11.8%	11.5%
basketball (college)	70637	7.2%	7.2%
basketball (pro)	67551	6.9%	6.4%
football (college)	116787	11.9%	12.3%
football-Monday night (pro)	83363	8.5%	8.4%
football-weekend (pro)	127339	13.0%	12.9%
golf	29781	3.0%	2.9%
ice hockey	37457	3.8%	3.7%
<b>Listen to radio:</b>			
6:00 am - 10:00 am weekday	517609	52.6%	53.2%
10:00 am - 3:00 pm weekday	357262	36.3%	37.4%
3:00 pm - 7:00 pm weekday	451861	46.0%	46.1%
7:00 pm - midnight weekday	158514	16.1%	15.5%
midnight - 6:00 am weekday	52934	5.4%	5.3%
6:00 am - 10:00 am weekend	302450	30.8%	31.7%
10:00 am - 3:00 pm weekend	425723	43.3%	42.9%
3:00 pm - 7:00 pm weekend	331892	33.8%	33.2%
7:00 pm - midnight weekend	168201	17.1%	16.3%
midnight - 6:00 am weekend	46435	4.7%	4.5%



## Market Potential: Internet

30% of Chisago Visitors Trade Area

Total 2010 Adults: 984,000

Product/Consumer Behavior:	<i>Expected Number of Adults</i>	<i>Expected Percent of Adults</i>	<i>Expected Percent in MN</i>
<b>Internet Access:</b>			
Have Access to Internet	861643	87.6%	86.5%
Have access to Internet,at home	729580	74.1%	71.9%
Have access to Internet,at work	445325	45.3%	41.9%
Have access to Internet,at schl/library	276943	28.1%	26.5%
Used Internet/mo,not hm/wrk/schl/lib	211398	21.5%	20.3%
Use Internet less than once/wk	29861	3.0%	3.9%
Use Internet 1-2 times per week	51816	5.3%	5.8%
Use Internet 3-6 times per week	80264	8.2%	8.6%
Use Internet daily	112463	11.4%	11.3%
Use Internet 2-4 times per day	192512	19.6%	18.6%
Use Internet 5 or more times/day	284735	28.9%	24.4%
Used Internet in last month,any	748464	76.1%	72.5%
Used Internet/mo,at home	664545	67.5%	63.7%
Used Internet/mo,at work	388588	39.5%	35.8%
Used Internet/mo,at school/library	94376	9.6%	7.4%
Used Internet/mo,not hm/wrk/schl/lib	102708	10.4%	9.0%
<b>Internet Activities in past month:</b>			
Used email	681541	69.3%	64.5%
Used Instant Messenger	282484	28.7%	24.9%
Paid bills online	355705	36.1%	31.6%
Visited online blog	106546	10.8%	8.3%
Wrote online blog	41402	4.2%	3.3%
Visited chat room	48422	4.9%	4.1%
Looked for employment	124205	12.6%	11.0%
Played games online	196142	19.9%	19.1%
Made trade or tracked investments	129254	13.1%	11.0%
Downloaded music	192838	19.6%	16.4%
Made phone call	613801	62.4%	2.7%
Made purchase, personal	354410	36.0%	32.0%
Made purchase,business	108912	11.1%	10.0%
Made travel plans	213152	21.7%	18.3%
Watched online video	179640	18.3%	15.0%

**Source:** These data area based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by Mediamark Research Inc. in a nationally representative survey of US households.



## Market Potential: Internet

### 30% of Chisago Visitors Trade Area

Total 2010 Adults: 984,000

<b>Product/Consumer Behavior:</b>	<b>Expected Number of Adults</b>	<b>Expected Percent of Adults</b>	<b>Expected Percent in MN</b>
<b>Information obtained online in past month:</b>			
New/used car info	100039	10.2%	9.6%
Financial info	275461	28.0%	24.2%
Obtained medical info	176611	17.9%	16.6%
Obtained latest news	429988	43.7%	38.4%
Obtained real estate info	131155	13.3%	11.3%
Obtained sports news/info	257580	26.2%	23.0%
<b>Ordered on Internet in last year:</b>			
Anything	392011	39.8%	37.2%
airline ticket	209131	21.3%	17.9%
CD/tape	60113	6.1%	5.1%
clothing	159567	16.2%	14.7%
computer	41058	4.2%	3.6%
computer accessories	51531	5.2%	4.4%
DVD	79244	8.1%	7.1%
flowers	56195	5.7%	4.7%
software	66519	6.8%	6.0%
tickets	109434	11.1%	9.3%
toy	49134	5.0%	4.9%
<b>E-commerce purchases in last year</b>			
Purchased item at Amazon.com	155241	15.8%	13.4%
Purchased item at barnes&noble.com	38420	3.9%	3.4%
Purchased item at bestbuy.com	28690	2.9%	2.5%
Purchased item at ebay.com	100835	10.2%	9.7%
Purchased item at walmart.com	31418	3.2%	3.5%
Spent <\$200 online	111105	11.3%	11.4%
Spent \$200-499 online	90797	9.2%	8.7%
Spent \$500+	172673	17.5%	15.3%

**Source:** These data area based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by Mediamark Research Inc. in a nationally representative survey of US households.



## APPENDIX 4: COPY OF CHISAGO COUNTY LODGING FACILITIES SURVEY

### Chisago County Lodging Facilities Survey

Please complete this survey for the tourism development planning team. Your responses will be used to assess the current state of lodging within Chisago County to better market your facilities and grow the tourist base. All of your responses will be strictly confidential and used only to develop an overall profile of visitors and visitor services. If you have questions, please contact Ryan Pesch at 218-770-4398 or [pesch@umn.edu](mailto:pesch@umn.edu). Thank you for your assistance!

1. Which one of the following most accurately describes your lodging facility?

- |                                  |   |                                     |   |
|----------------------------------|---|-------------------------------------|---|
| <input type="checkbox"/> Hotel   | <input type="checkbox"/> Motel w/ Restaurant  | <input type="checkbox"/> Campground | <input type="checkbox"/> Other: (specify) |
| <input type="checkbox"/> Resort  | <input type="checkbox"/> Motel w/o Restaurant | <input type="checkbox"/> RV Park    | _____                                     |
| <input type="checkbox"/> Cottage | <input type="checkbox"/> Bed & Breakfast Inn  | <input type="checkbox"/> Hostel     | _____                                     |

2. Please indicate the number of units you have, by type AND overall total number:

- |              |                             |                             |                  |
|--------------|-----------------------------|-----------------------------|------------------|
| _____ Single | _____ King                  | _____ Campsites w/hookups   | Other: (specify) |
| _____ Double | _____ Suite                 | _____ Campsites w/o hookups | _____            |
| _____ Cabins | _____ TOTAL NUMBER OF UNITS |                             |                  |

3. What is your average daily rate?                      \$\_\_\_\_\_ In-Season                      \$\_\_\_\_\_ Off-Season

4. Please indicate Weekday and Weekend seasonal occupancy rates and any months you are closed:

- |                          |                  |                  |               |
|--------------------------|------------------|------------------|---------------|
| <b>Spring (Mar-May)</b>  | Weekdays: _____% | Weekends: _____% | Closed: _____ |
| <b>Summer (June-Aug)</b> | Weekdays: _____% | Weekends: _____% | Closed: _____ |
| <b>Fall (Sept - Nov)</b> | Weekdays: _____% | Weekends: _____% | Closed: _____ |
| <b>Winter (Dec-Feb)</b>  | Weekdays: _____% | Weekends: _____% | Closed: _____ |

5. In the past three years how has the demand for your lodging establishment changed?

- Decreased                       Stayed about the same                       Increased

6. What percent of your guests do you estimate are traveling for:    Business: \_\_\_\_\_ %                      Leisure: \_\_\_\_\_ %

7. Please indicate your annual employment figures for full-time and part-time positions:

- Full-time employees:                      \_\_\_\_\_  
Part-time employees:                      \_\_\_\_\_

8. Are you planning any additions or renovations within the next 12 months?     YES     NO

9. Who is your primary target market (for example, families w/ children, seniors or business travelers)?

\_\_\_\_\_

10. Please provide any additional comments about how to improve tourism in Chisago County:

\_\_\_\_\_  
\_\_\_\_\_

Source: Adapted from the *Community Tourism Development Guide*, University of Minnesota, 2011.