Fall 2019

St. Cloud Metro Area Visitor Profile & Economic Impact Report Fall Season 2019

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This report is a collaboration between St. Cloud City Hall, St. Cloud Convention and Visitor Bureau, the RSVP program, St. Cloud State University School of Public Affairs, and University of Minnesota Extension Center for Community Vitality.

EXECUTIVE SUMMARY

The purpose of this project was to better understand visitor's travel experience in the St. Cloud Metro area and to profile visitors based on their characteristics. The findings of this project will assist with destination planning, marketing and offer a better destination experience for those who visit the St. Cloud Metro area in the future.

METHODS

A questionnaire in both on-site and online formats was administered to collect data from respondents. For the on-site survey, a convenience sampling approach was utilized at various attractions, including major accommodation service locations, St. Cloud Regional Airport, River's Edge Convention Center, St. Cloud State University, Municipal Athletic Complex, and the Lake George area. A total of 293 valid copies of questionnaires were completed from September to November 2019. Questionnaire data were entered and analyzed by utilizing SPSS (version 23), a statistical analysis software package. Microsoft Excel and Word 2016 were also used to create graphs and charts. The questionnaire was based on the 2015 University of Minnesota Extension Tourism Center's Park Point Art Fair Survey (Qian, 2015) and was reviewed by a group of subject matter experts (a good face validity).

RESULTS & DISCUSSION

DEMOGRAPHICS

Based on the on-site and online questionnaires of the 2019 Fall Visitor profile, the findings suggest that the St. Cloud Metro Area attracted visitors with higher household incomes. It is similar findings as we found in the summertime. Thirty percent of participants had a household income of more than $100,000 while the median U.S. household income was $68,703 (U.S. Census Bureau, 2019). This area also attracted people who were over the age of 50 (50.5%) and the average visitor group size is 1.72 persons, which is a smaller group size than summer's one. Most participants lived within a 60-mile radius (38.8%), which implied that the spending on accommodation/lodging services could be limited. Word of mouth, Google, and Facebook were the three most common resources for obtaining the destination information. The top three reasons to visit the St. Cloud Metro Area were visiting the college campus, attending convention/conference, and visiting friends and families, which accounting for half of the total reasons (54.0%). Attending festivals or special events was no longer the main reason for visiting the St. Cloud Metro Area due to their seasonality. Respondents also indicated that the top three activities they participated in included dining out (22.8%), going shopping (12.8%), and attending festivals/events (9.2%).

RELATIONSHIPS BETWEEN PARTICIPANTS AND THEIR PREFERENCES

More male participants tended to be in the younger groups while females were more in middle and older age groups. Although participants with middle-income levels were the most significant group both in male and female groups, female participants tended to be in the lower-income level status whereas male participants were in the higher income level. Reasons for visiting were slightly different from male and female participants. For female participants, the top two reasons for visiting were doing business and attending family events while doing business and visiting the campus were two major reasons for male participants. Also, more female participants than

males went shopping during their trip to the St. Cloud Metro area. Based on the observations, it could be concluded some activity participations in the area could be gendered.

Younger-aged participants tended to choose the St. Cloud Metro area as their primary destination during their trips while older folks had a lower rate to think about the St. Cloud Metro Area as their primary destination. It also could get a similar trend that younger-aged participants tended to stay at the St. Cloud Metro Area longer than the other two age groups. As for the number of times visiting the St. Cloud Metro Area, older-aged participants visited significantly more times than the other two age groups. Younger-aged participants also tended not to spend too much during their trips to the St. Cloud Metro Area compared to middle- and older-aged groups. Based on the aforementioned information, younger-aged participants tended to spend more nights at the St. Cloud Metro Area and chose this area as their primary destinations while older folks visited the St. Cloud Metro area more times than the other two age groups, but this area sometimes was not their primary destination in their trips. Also, as for the reasons for visiting, older-aged participants tended to attend the nightlife activities and visit museums and libraries whereas middle-aged participants tended to attend the meetings/conventions and to visit the campus.

Most younger-aged participants had their income level in the lower-income group whereas the middle-aged ones were in the higher income groups and the older-aged participants were in the middle-income group. Most local participants (within a 60-mile radius) visited the St. Cloud Metro Area due to visiting the campus, doing business whereas attending special events and passing through were two major reasons for in-state participants. For the out-of-state participants, visiting families and relatives was the most significant reason for visiting here, followed by visiting the campus. Out-of-state participants would like to have higher expenditures in the lodgings, restaurants, and travel-related categories compared to the local and in-state groups. Out-of-state participants also were significantly more likely to participate in some specific activities than the in-state and local group, including dining out, going sightseeing, going hiking, visiting families and relatives, visiting college campus while most local participants would like to attend the festivals and special events at the St. Cloud Metro area.

Activity participation significantly differed by participants' income level. Lower-income participants were more likely to spend more nights in the area than the middle- and higher-income participants. The lower-income participants tended to visit the health care during their trips to the St. Cloud Metro Area while the middle-income participants tended to participate in the other outdoor activities, and the higher-income ones preferred for visiting the campus more.

RESPONDENTS' ATTITUDES ON SATISFACTION

More than 81.3% of participants indicated that they were satisfied with their travel experience in the St. Cloud Metro Area, and more than 76.2% of them would like to come back in the future. Besides, about 76.9% of the total participants were willing to recommend the St. Cloud Metro Area to other visitors in the future.

SPENDING

Male and female participants spent slightly different on the entertainment while males significantly spent more on this item than females. Out-of-State participants significantly spent more money on lodging services, restaurants, and travel-related purchases than the other two

residency groups. Except for some extreme outliners in the other miscellaneous purchases, expenditures in shopping and restaurant were two major spending categories for participants as the finding also echoed that dining out was the most popular activity for participants when they visited the St. Cloud Metro Area.

ECONOMIC IMPACT ANALYSIS

On average, St. Cloud visitors in the fall spent $130.06 per person per day. Major expenditures included dining out, shopping, and lodging. The direct effect is the number of estimated visitors times the average spending per visitor. In the fall, this works out to total visitor spending of $54.2 million. In fall 2019, visitors to St. Cloud generated an estimated $77.8 million in economic activity in the region. This included $20.2 million in labor income. Visitors supported employment for 780 workers in the area during the fall season. Overnight visitors drove the most significant share of economic activity. Of the $77.8 million total, 72 percent was from overnight visitors.

INTRODUCTION

Visitor profiling has made significant contributions to destination marketing campaigns from the past decades when destination marketing managers try to strategize customized marketing programs for their potential visitors. Various studies have highlighted the importance of visitor profiling on destination marketing campaigns for decades (e.g., Perera, Vlosky, & Wahala, 2012). Through profiling visitors, the St. Cloud City Hall and the St. Cloud Area Convention and Visitors Bureau (hereinafter SCACVB) will have the chance to learn detailed information about visitors' preferences and their touring behaviors, such as purposes of trips, touring activities, spending behaviors, and perceptions on the St. Cloud Metro area.

Our project is designed to answer questions about who our visitors are, what visitors do, what accommodation services visitors use, and how much visitors spend during their stay. The purpose of this project is twofold: (1) to profile visitors to the St. Cloud Metro Area and (2) to estimate the economic impacts of tourism development on the St. Cloud Metro Area. Therefore, various approaches and techniques were utilized to fulfill these dual purposes, including online/on-site visitor surveying, a Geographic Information System (GIS), and IMPLAN (IMpact Analysis for PLANning) analysis. Data collected from online and on-site surveys were statistically analyzed to identify major features of touring behaviors and their possible correlation with visitors' sociodemographic backgrounds. GIS software was used to provide a spatial analysis of visitors' trips to the St. Cloud Metro Area as well as visitors' residential maps. Additionally, the IMPLAN program was used to examine three possible economic impacts- direct, indirect, and induced- of visitors' activities in the area.

Based on a report from the Minnesota State Tourism Office (Explore Minnesota, 2017), total sales in leisure and hospitality in Stearns County in 2015 amounted to $324 million, accounting for approximately 26% of the total sales in the Central Minnesota region. Approximately 9,300 people work in this industry in the St. Cloud Metro Area. This report recognizes the significant contribution of the leisure and hospitality industry to the local and state economy. Therefore, the St. Cloud Metro Area must continue to invest in this industry to increase the number of visitors. In response to the need for visitor profiling, we proposed to survey current visitors for one calendar year (four seasons) and prepare four quarterly progress reports and a final report with detailed information and recommendations to City Hall and the SCACVB. The remainder of this document highlights our research methodology and findings.

A key component of this project is the use of a valid survey instrument to profile area visitors and to determine the economic impacts of tourism. This instrument (a draft of which appears below) is based on the Itasca Area Visitor Profile (University of Minnesota, 2016) and was reviewed by a panel of experts. It has strong face validity and has been used before with good reliability. After collecting and analyzing survey data, including spatial and economic analyses, we will publish our findings for each quarter. These quarterly reports will provide local tourism promoting institutions a chance to examine the seasonal variation of visitors to the St. Cloud Metro Area. A final report highlighting key findings and recommendations will offer insights into current local visitors' touring and spending patterns and make predictions about prospective visitors to the area. Information collected in this project will be a valuable and essential resource for destination marketing professionals. Indeed, armed with this knowledge, City Hall and

SCACVB will be able to adopt appropriate strategies to re-examine their tourism products and initiate new promotion campaigns to accommodate tourists' needs and demands in the future.

METHODOLOGY

STUDY SETTING

The visitor profiling project surveyed visitors who traveled to the St. Cloud Metro Area, which includes St. Cloud, Waite Park, Sauk Rapids, Sartell, and St. Joseph from September to November 2019. Researchers placed survey recruiting and promotion materials at seven major hotels, three restaurants, and local attractions (Stearns County History Museum, Munsinger Gardens, Crossroads Mall, and the Paramount Theater). Besides, the survey team-with help from the Retired and Senior Volunteer Program (RSVP)-conducted surveys at various events held at River's Edge Convention Center, St. Cloud Regional Airport, St. Cloud State University, and the Municipal Athletic Complex.

QUESTIONNAIRE

The visitor questionnaire was developed based on the 2016 University of Minnesota Extension Tourism Center's Itasca Area Visitor Profile (University of Minnesota, 2016). It included sections on travel experience in the St. Cloud Metro Area, activity participation, length of stay, accommodation usage, spending amount, information sources, satisfaction evaluation, and participants' demographic information (see Appendix A).

DATA COLLECTION

A sampling plan was created based on the Itasca Area Visitor Profile (University of Minnesota, 2016) and suggestions from major project sponsors: St. Cloud City Hall and SCACVB. The sampling plan included both spatial and time considerations to (1) ensure coverage of various activities and areas throughout the whole year and (2) to reach a wide range of visitors to the St. Cloud Metro Area. With permission from the St. Cloud State University Institutional Review Board, two methods were designed to collect participant data, namely an online and on-site survey. The online survey was created using the Qualtrics platform, enabling participants to use their own devices to complete the questionnaire. The alternative approach used volunteers from the RSVP program and St. Cloud State University researchers to recruit potential participants on site. Specifically, a convenience sampling approach was implemented whereby data collection volunteers asked passing visitors to complete the questionnaire. It is important to note that the online approach was deemed not popular with participants, and thus the data collection method for this project was modified to accommodate their suggestions. Therefore, after a discussion with two major sponsors, it was decided that data would mostly be collected using the on-site survey method.

For collecting participant data, we received a lot of assistance from our sponsors. Ms. Jennifer Wucherer (St. Cloud Area Coordinator), based at the Whitney Recreation Center, coordinated survey volunteers from RSVP and ensured that we had sufficient survey teams at each St. Cloud Metro Area event. The project's primary investigator, Dr. Hung-Chih Yu, and his team were responsible for the volunteer training program and drafting the monthly survey schedule for the RSVP volunteers. The survey promotion materials were designed and produced by Ms. Erin Statz (Sales and Services Coordinator) and Ms. Julie Lunning (Executive Director) of the SCACVB to draw visitors' attention to the survey project and increase their willingness to participate. We also greatly appreciate the unconditional support for the visitor project from Mr. Tony Goddard, the St. Cloud Director of Community Services and Facilities.

ANALYSIS

A total of 293 participants completed questionnaires from September 1, 2019, to November 30, 2019, either primarily on-site or online. Questionnaires were analyzed using SPSS (version 23), the statistical software. Analyses provided frequencies to describe the sample of visitors and other information on variables of interest. Means, medians, standard deviations, percentages (%), and other applicable statistical tests were utilized to paint the big picture from the findings. Microsoft Excel and Word 2016 were then used to create graphs and charts representing the data analyses.

RESULTS: VISITOR PROFILING

DEMOGRAPHICS

Based on a total of 293 completed surveys, Table 1 illustrates major demographic information about the participants in this study.

Table 1 Demographics of Respondents, (n=293)

	Frequency	Percent (%)
Gender		
Female	170	63.0
Male	100	37.0
Total	270	100.0
Missing Value	23	
Residency		
Less than 60 Miles	100	38.8
More than 60 Miles in MN	85	32.9
Outside of MN	73	28.3
Total	258	100.0
Missing Value	35	
Income		
< $20,000	20	8.0
$20,001 - $34,999	22	8.8
$35,000 - $49,999	24	9.6
$50,000 - $74,999	55	21.9
$75,000 - $100,000	54	21.5
>$100,001	76	30.3
Total	251	100.0
Missing Value	42	
Age		
18 - 30	36	13.2
31 - 40	39	14.3
41-50	60	22.0
51-60	49	17.9
61-70	55	20.1
71+	34	12.5
Total	273	100.0
Missing Value	20	

Approximately 63 percent of the respondents were female. The average age of participants (see Figure 1) was 50.74 years old. Most participants (22.0% in total) were in the age range of 41-50 years old, followed by 20.1 percent in the 61-70 age range, and 17.9 percent in the 51-60 age range. The majority of participants (38.8%) resided within a 60-mile radius of the St. Cloud Metro Area, followed by 32.9% residing outside of a 60-mile radius (in-state), and 28.3% residing out of state (see Figure 2, Figure 3, and Figure 4); however, about 10% of the surveys contained missing values for this variable. The most frequently reported annual pre-tax household income (see Figure 5) was more than $100,000 (30.3%), followed by $50,000-74,999 (21.9%) and $75,000-100,000 (21.5%). In sum, this demographic information shows that most visitors in this study came from within a 60-mile radius and were above 50 years old (47.1%). More than 51% of participants had a pre-tax annual household income of over $75,000.

Figure 1: Percentage of Participants in Various Age Brackets

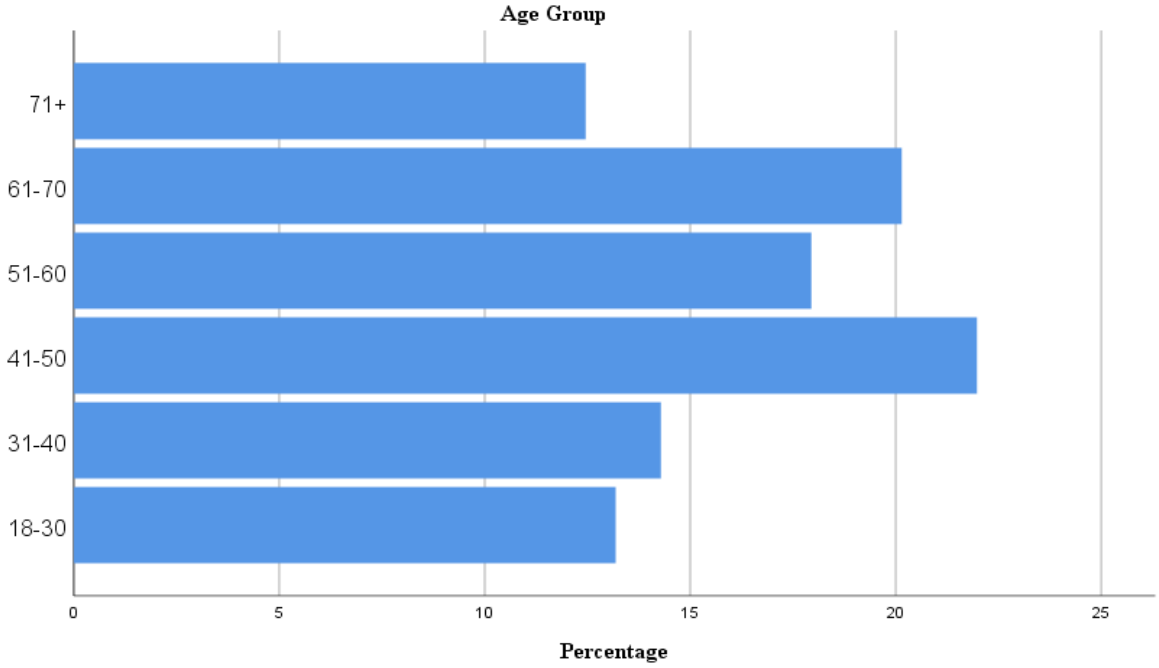


Figure 2: Participants' Residency Distribution

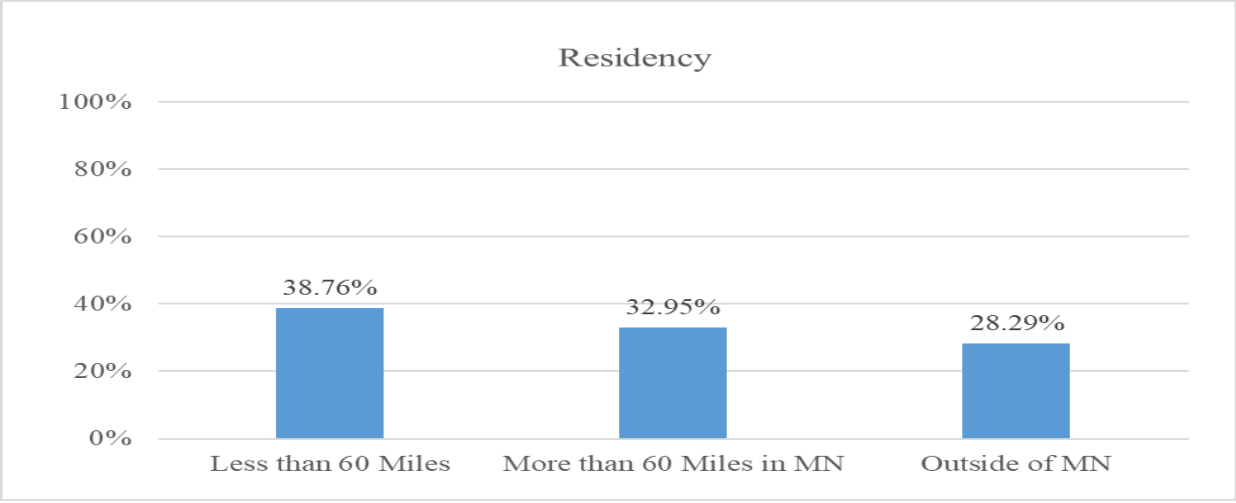


Figure 3: Participants' Residency Map (Minnesota)

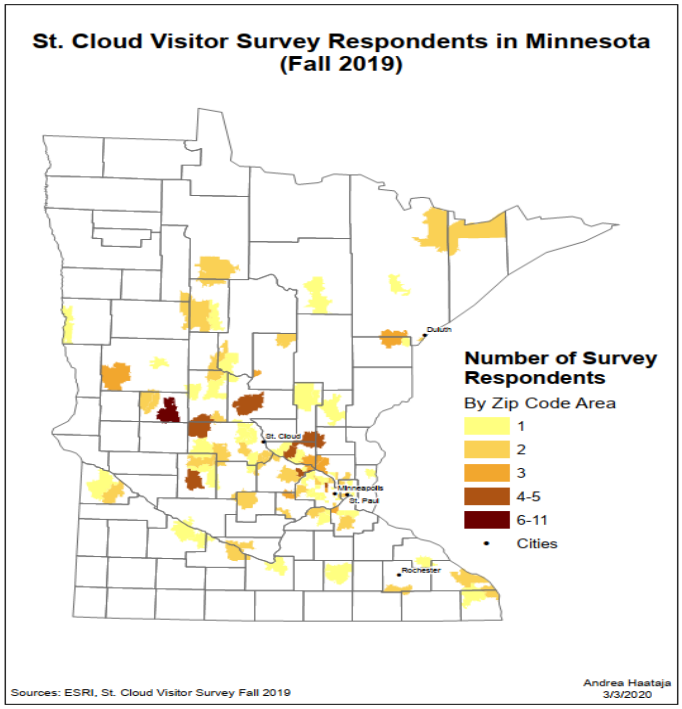


Figure 4: Participants' Residency Map (the United States)

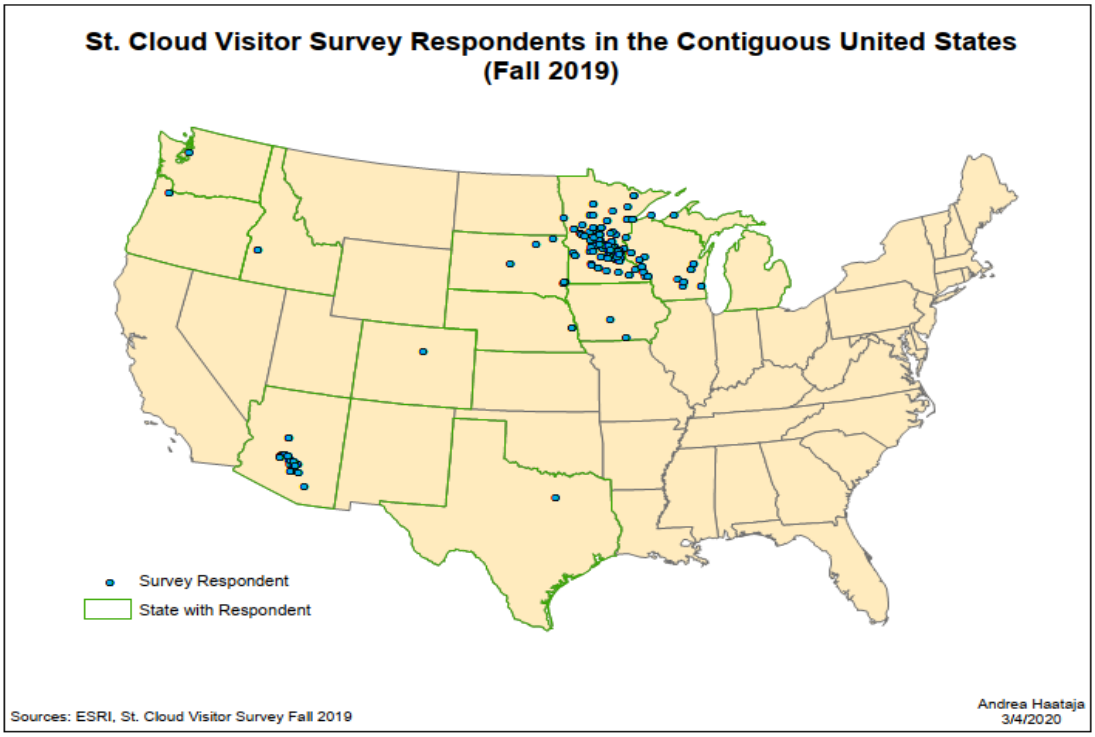
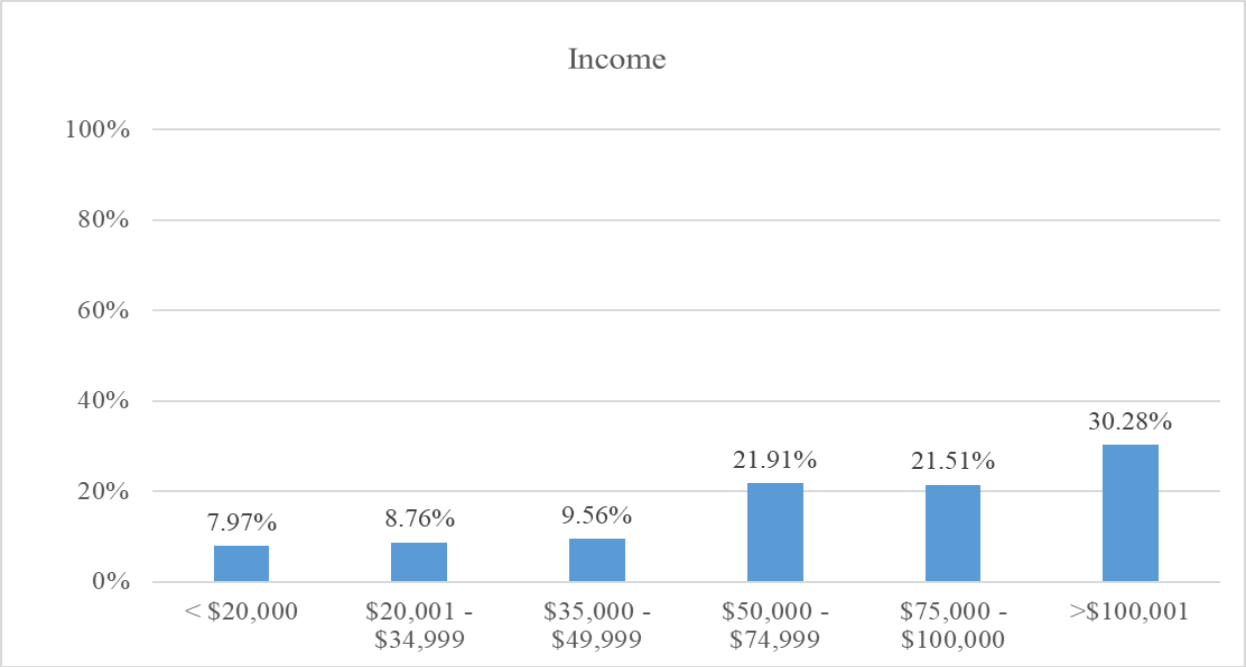


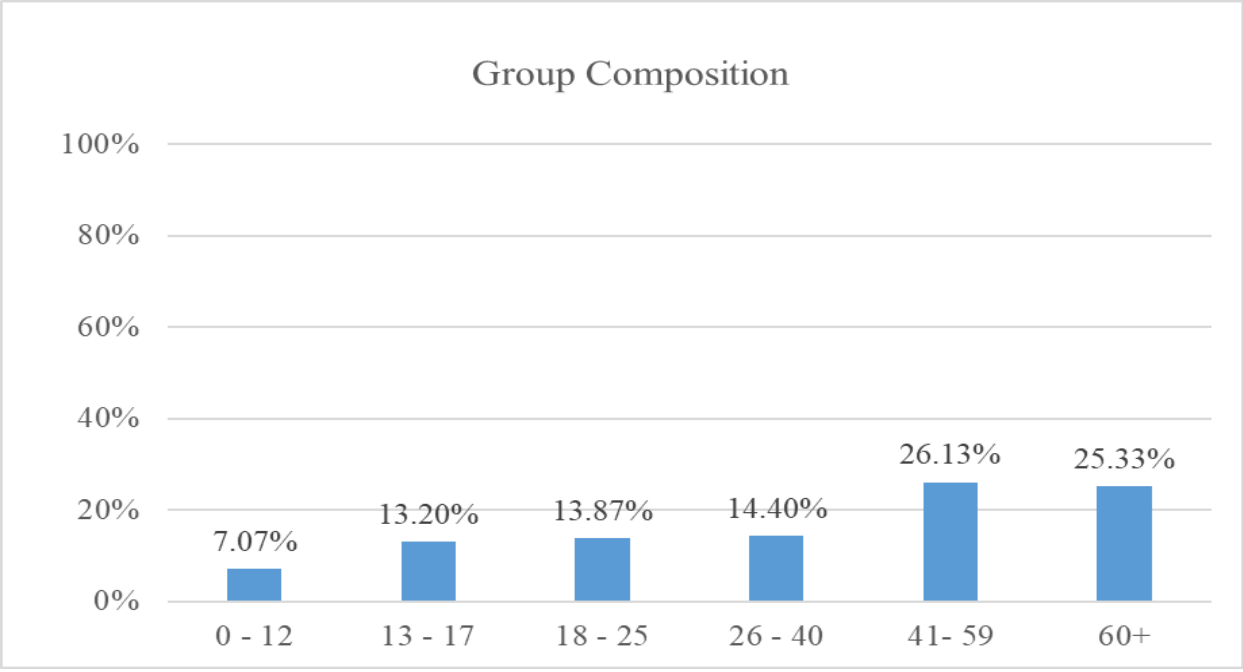
Figure 5: Participants' Income Distribution



DESCRIPTIONS OF GROUPS, INFORMATION SOURCES, REASONS, AND ACTIVITIES

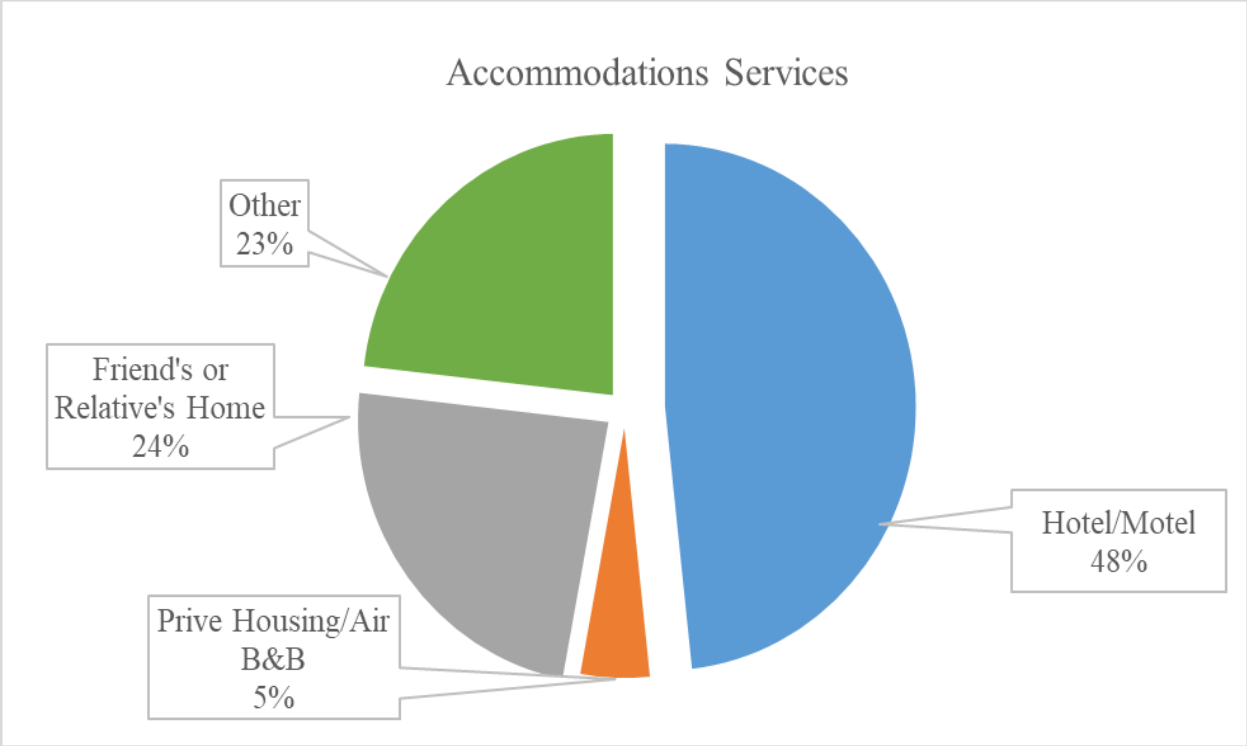
The average group size was 1.72 persons, and the most common age ranges for group members were the 60+ age range (25.33%, 1.61 persons) and the 41-59 age range (26.13, 1.54 persons), and together these two age groups accounted for 51.46% of total travel group members (see Figure 6).

Figure 6: Visitors' Group Composition



About 20.3 percent of visitors had members younger than 18 years old in their groups. Almost half of the fall visitors surveyed (48.0%) used hotels/motels for their accommodation needs, while roughly a quarter (24.0%) stayed with friends or relatives (see Figure 7). This finding directly contrasted with the summer survey findings that showed a majority of summer visitors used their friends' and relatives' homes for accommodation (55.3%) while a quarter (24.5%) used hotels/motels.

Figure 7: Visitors' Accommodation Usage Distribution



As Table 2 and Figure 8 illustrate, the most common ways in which visitors learned about the St. Cloud Metro Area were via word of mouth (28.47%), Google (17.44%), and 'other' miscellaneous sources (13.88%). No one used the following information sources: bloggers/YouTubers, magazine advertisements, and Pinterest. Interestingly, word of mouth ranked as the primary information source in both the summer and fall seasons.

Table 2: Information Sources Distribution, (n=281)

	Responses	
Information	N	Percent%
www.visitstcloud.com	16	5.69
St. Cloud visitor guide	12	4.27
area/destination newsletter	3	1.07
Magazine advertisement	0	0.00
ExploreMinnesota.com	6	2.14
Travel Information Center	2	0.71
Newspaper	6	2.14

Travel agent	4	1.42
Blogger/Travel, YouTuber	0	0.00
Word of mouth	80	28.47
Radio	4	1.42
TV	2	0.71
Facebook	29	10.32
Twitter	6	2.14
Google	49	17.44
Instagram	4	1.42
Pinterest	0	0.00
Tripadvisor.com	12	4.27
Expedia	4	1.42
Yelp	3	1.07
Other	39	13.88
Total	281	100.00

Figure 8: Visitors' Information Sources Distribution

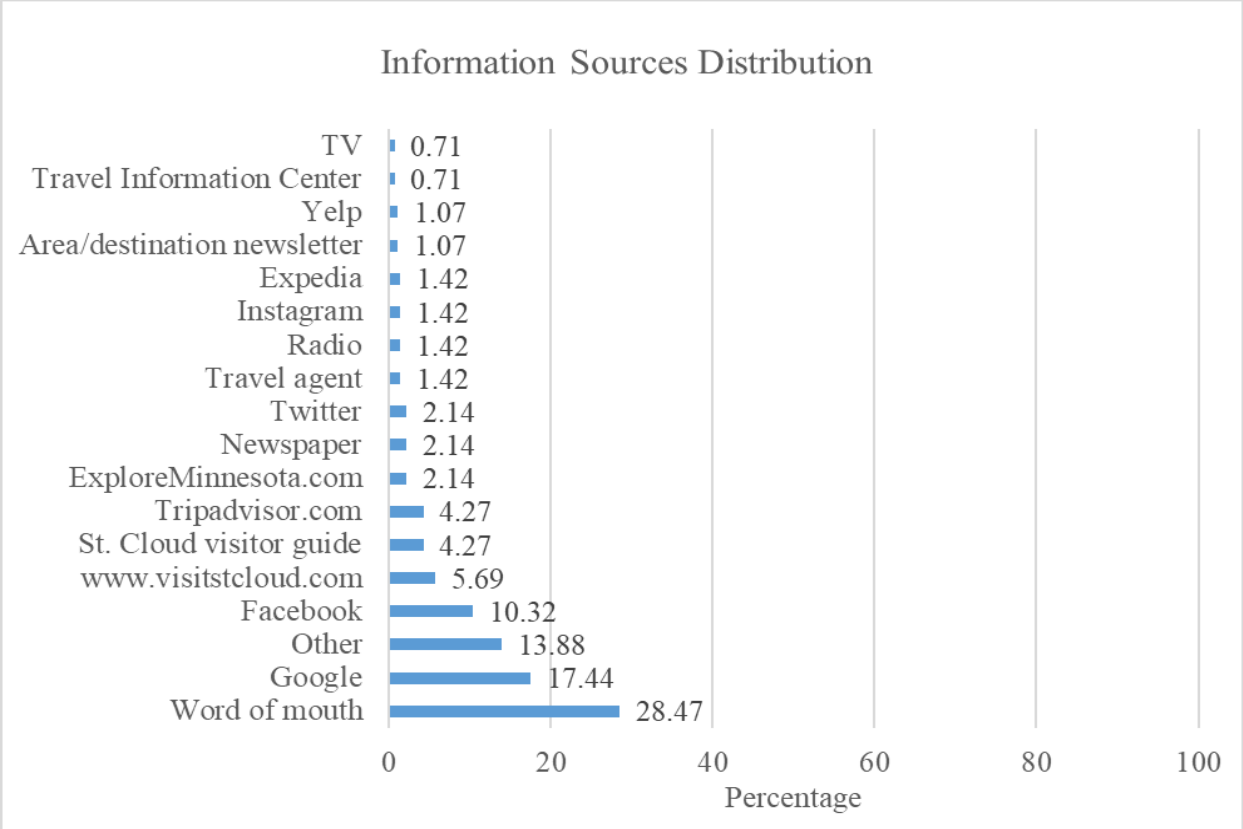


Table 3 and Figure 9 illustrate the reasons that participants gave for visiting the St. Cloud Metro Area in fall 2019. The top four reasons given were going to the campus (18.4%), attending a convention/conference (18.0%), seeing family/friends (17.6%), and passing through (15.6%). In addition, Table 4 and Figure 10 show that the top three most common activities reported by

visitors were dining out (22.8%), shopping (12.80%), and festivals/events (9.20%). All results were identical to findings from summer 2019.

Table 3: Reasons for Visiting the St. Cloud Metro Area, (n=256)

	Responses	
Reasons	N	Percent %
Art, music, or theater	18	7.0
Business/Work	12	4.7
Campus visit	47	18.4
Convention/Conference	46	18.0
Festival/event	13	5.1
Food & Drink	1	0.4
Historic sites/Museum	0	0.0
Health care	3	1.2
Outdoor recreation	0	0.0
Passing through	40	15.6
Shopping	13	5.1
Sports events	14	5.5
Visit Family/Friends	45	17.6
Wedding	2	0.8
Other	2	0.8
Total	256	100.0

Figure 9: Reasons to Visit the St. Cloud Metro Area

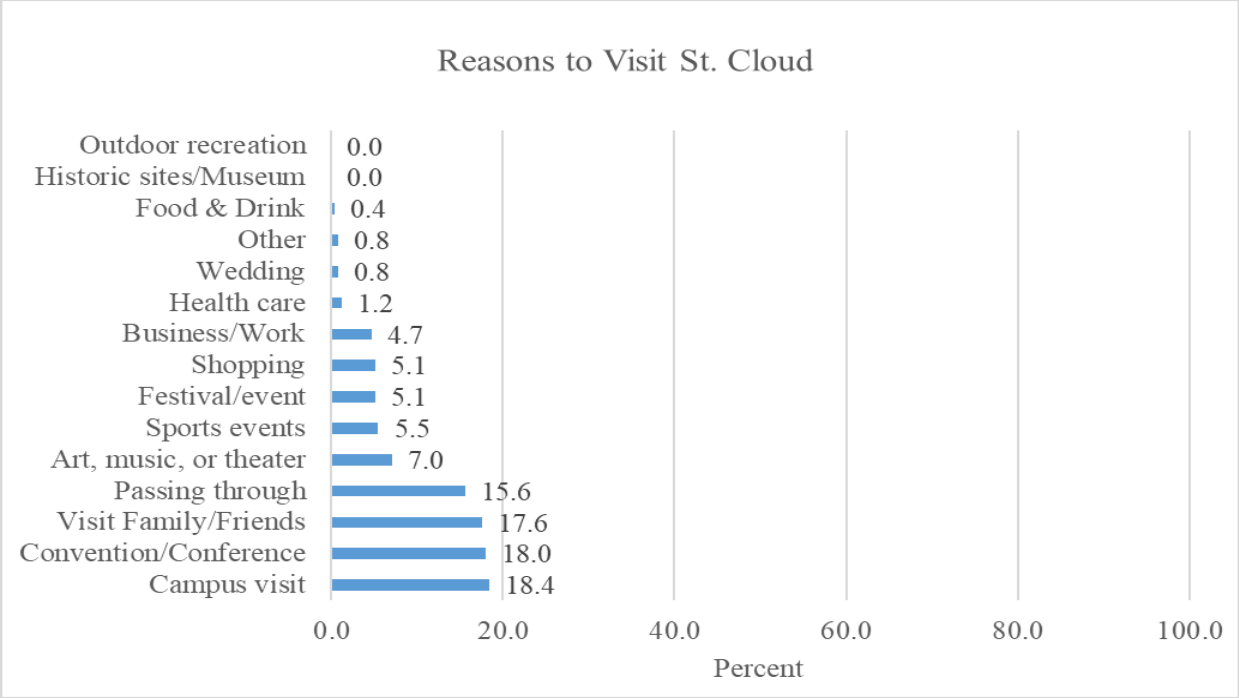
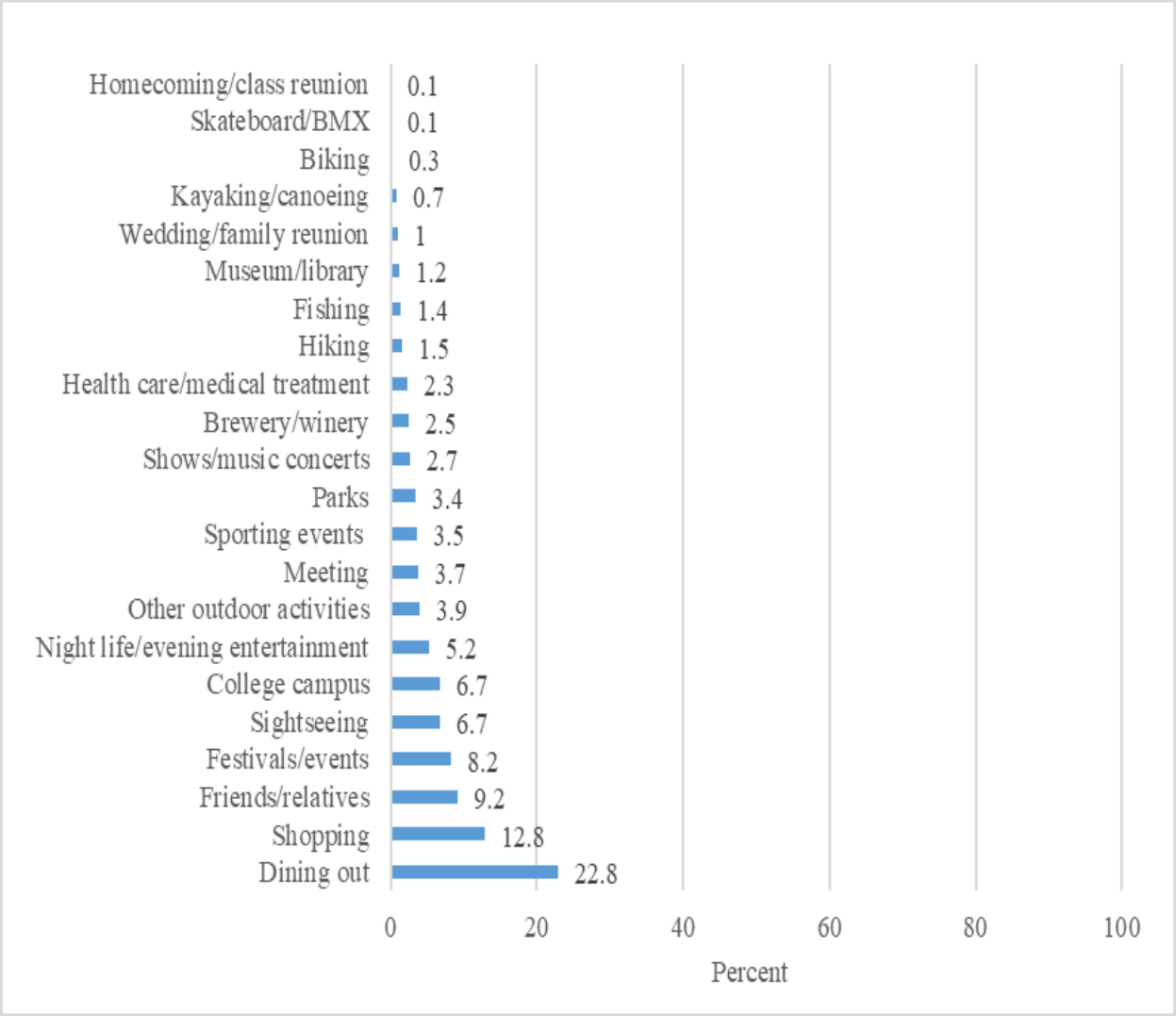


Table 4: Visitor's Activities in the St. Cloud Metro Area, (n=247)

	Responses	
Activities	N	Percent%
Dining out	201	22.8
Health care/medical treatment	20	2.3
Nightlife/evening entertainment	46	5.2
Shopping	113	12.8
Sightseeing	59	6.7
Meeting	33	3.7
Biking	3	0.3
Fishing	12	1.4
Hiking	13	1.5
Kayaking/canoeing	6	0.7
Skateboard/BMX	1	0.1
Other outdoor activities	34	3.9
Brewery/winery	22	2.5
Friends/relatives	81	9.2
College campus	59	6.7
Museum/library	11	1.2
Parks	30	3.4
Festivals/events	72	8.2
Homecoming/class reunion	1	0.1
Sporting events	31	3.5
Shows/music concerts	24	2.7
Wedding/family reunion	9	1.0
Total	881	100.0

Figure 10: Activity Participation in the St. Cloud Metro Area



GENDER AND AGE

Age differed significantly between male and female participants (χ^2=22.300, p<0.00; see Table 5 and Figure 11).

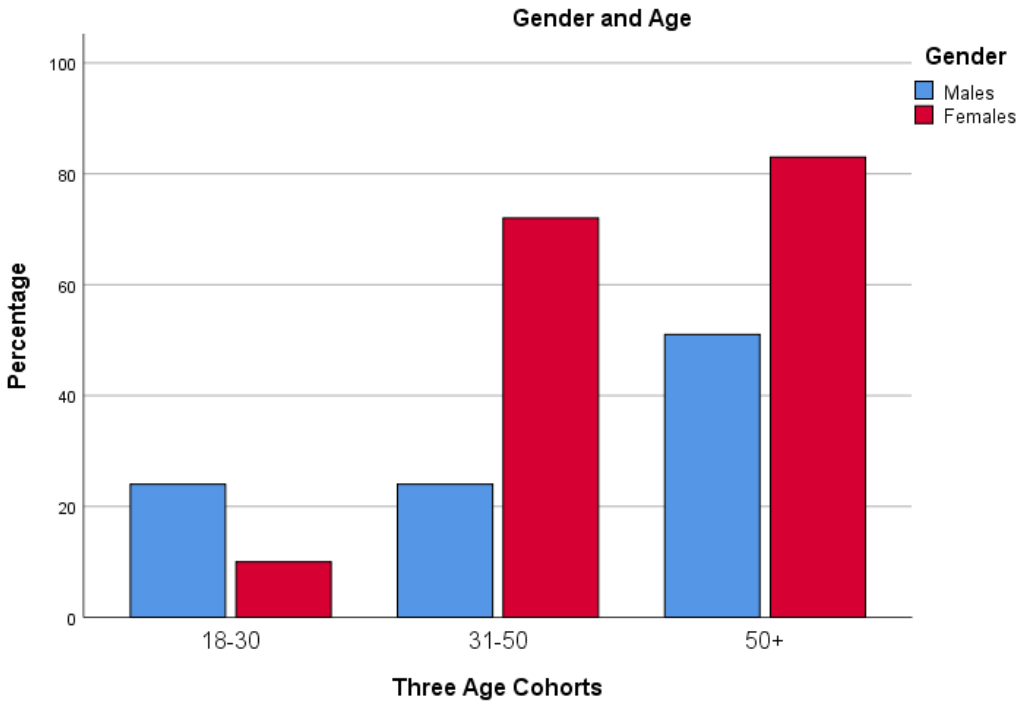
Table 5: The Interrelationship between Age and Gender, (n=264)

	Percentage (%) of Gender		Statistics		
	Male (n=99)	**Female** (n=165)	**χ2** 22.300	**Sig.** 0.000	***
Age Group					
18 - 30 Years Old	70.6	29.4			
31 - 50 Years Old	25.0	75.0			
50+ Years Old	38.1	61.9			

*p<0.05; **p<0.01; ***p<0.00

Age groups were re-categorized into three major clusters for this data analysis, namely younger (18-30), middle-aged (31-50), and older (50+). More male participants were in the younger age group than females (70.6% vs. 29.4%) while there was a preponderance of females in the middle and older age groups (75.0% vs. 25.0%; 61.9% vs. 38.1%).

Figure 11: The interrelationship between Gender and Age



GENDER AND INCOME

Household income was regrouped into three categories for this data analysis, including lower (< $50,000), middle ($50,001-$99,000), and higher (>$100,000). As for the interrelationship between gender and income (see Table 6), household income levels differed significantly across the two gender groups (χ^2=6.401, p<0.05, see Table 6 and Figure 12).

Table 6: The Interrelationship between Gender and Income, (n=241)

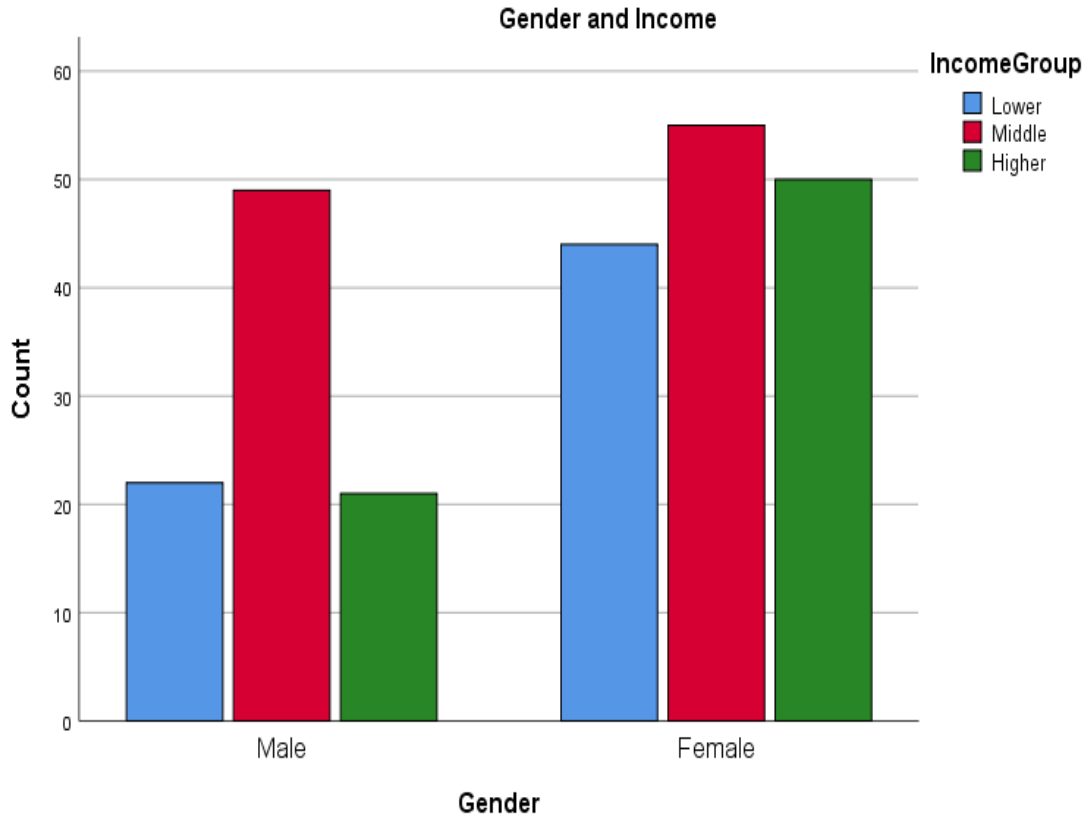
	Percentage (%) of Income Group			Statistics		
	Less than $50,000 (n=66)	**Between $50,001 - $99,999** (n=104)	**$100,000 and More** (n=71)	**χ2** 6.401	**Sig.** 0.041	*
Gender						
Male	23.9	53.3	22.8			
Female	29.5	36.9	33.6			

*p<0.05; **p<0.01; ***p<0.00

Both males and females were more likely to be in the middle-income group. In addition to the middle-income group, there was a roughly even number of males in the lower and higher-income groups (23.9% vs. 22.8% respectively) while there were more females in the higher income

group than in the lower-income group (33.6% vs. 29.5%). Overall, the findings show that male and female participants differed significantly in terms of income composition.

Figure 12: The Interrelationship between Gender and Income



GENDER AND REASONS FOR VISITING

Reasons have been re-categorized into eight groups for the following comparisons (see Table 7) Such regrouping approach was used in this season only.

Table 7: New Reason Categories

New	Name	Old reasons
Reason 1	Special event attending	Art, music, or theatre; festival/event
Reason 2	Business	Business/work; convention/conference; health care
Reason 3	Campus visit	Campus visit
Reason 4	Entertainment	Food & drink; shopping; historic site/museum
Reason 5	Sports	Sports event
Reason 6	Passing through	Passing through
Reason 7	Family event	Visit family/friends; wedding
Reason 8	Other	Other

Reasons for visiting the St. Cloud Metro Area differed significantly between female and male participants (χ^2=14.366, p<.05; see Table 8 and Figure 13). For female participants, the top three reasons were business (25.0%), family events (23.1%), and campus visits (17.3%) whereas for

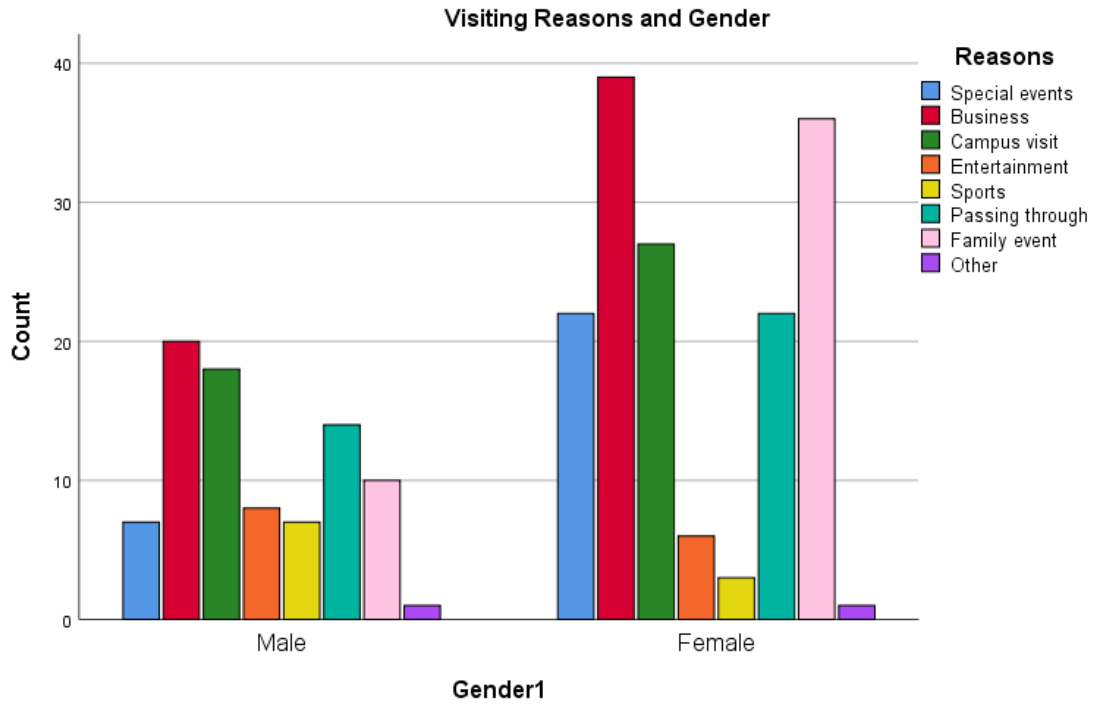
male participants the top three reasons were business (23.5%), campus visits (21.2%), and passing through (16.5%).

Table 8: The Interrelationship between Gender and Reasons for Visiting, (n=283)

	Percentage (%) of Gender		Statistics	
	Male (n=85)	**Female** (n=156)	**χ^2**	**Sig.**
Reason			14.366	0.045*
Special event attending	8.2	14.1		
Business	23.5	25.0		
Campus visit	21.2	17.3		
Entertainment	9.4	3.8		
Sports	8.2	1.9		
Passing through	16.5	4.1		
Family event	11.8	23.1		
Other	1.2	0.6		

*p< 0.05

Figure 13: The Interrelationships between Gender and Reasons for visiting



GENDER AND SPENDING

As for the spending differences between the genders (see Table 9), male participants (M=$12.65, SD=35.79) spent significantly more money on entertainment than their female counterparts (M=$4.53, SD=17.03, t=2.1, p<0.05). Aside from that, there were no significant differences in spending habits between males and females.

Table 9: Comparisons of Spending by Gender, (n=270)

	Gender	n	Mean		SD
Spending					
Total amount	Male	100	298.96		741.48
	Female	170	152.52		255.52
Groceries	Male	100	13.15		55.14
	Female	170	11.68		45.65
Entertainment	Male	100	12.65	a	35.79
	Female	170	4.53	a	17.03
Lodge	Male	100	58.91		264.52
	Female	170	32.49		73.17
Recreation	Male	100	3.97		17.51
	Female	170	3.49		13.22
Restaurant	Male	100	40.94		72.32
	Female	170	44.93		71.20
Shopping	Male	100	58.05		165.28
	Female	170	43.24		133.51
Travel	Male	100	14.04		42.75
	Female	170	11.82		32.88
Other	Male	100	97.25		63.36
	Female	170	0.49		0.36

a: $p<0.05$

GENDER AND ACTIVITY PARTICIPATION

Comparing activity participation for male and female informants (see Table 10), females (70.9% of total responses in this category) were more likely than males (29.1%) to go shopping ($\chi^2=5.026$, $p<0.05$) whereas males (70.9%) were significantly more likely to go to sporting events than their female counterparts (39.1%; $\chi^2=7.510$, $p<0.01$).

GENDER AND INFORMATION SOURCES

Gender significantly differentiated (see Table 11) the use of radio ($\chi^2=6.902$, $p<0.01$) and Facebook ($\chi^2=7.527$, $p<0.01$) as sources of information on the St. Cloud Metro Area. Specifically, males were far more likely to use the radio for the destination information than

females (100.0% vs. 0.0%) whereas females were much more likely to use Facebook as the destination information than males (86.2% vs. 13.8%).

Table 10: Comparisons of Activities by Gender, (n=265)

	Percentage (%) of Activity Participation		Statistics		
	Male	**Female**	**χ2**	**Sig.**	
Activity	(n=95)	(n=156)			
Dining out	24.1	22.2			
Health care/medical treatment	2.4	2.4			
Night life/evening entertainment	6.5	4.6			
Shopping	10.9 (29.1[1])	14.2 (70.9)	5.026	0.025	*
Sightseeing	4.8	7.3			
Meeting	3.7	3.8			
Biking	0.7	0.2			
Fishing	1.0	1.3			
Hiking	1.0	1.6			
Kayaking/canoeing	0.7	0.4			
Skateboard/BMX	0.0	0.2			
Other outdoor activities	4.1	3.6			
Brewery/winery	2.7	2.6			
Friends/relatives	8.8	9.5			
College campus	8.8	6.0			
Museum/library	0.7	1.1			
Parks	3.4	3.6			
Festivals/events	7.1	8.7			
Homecoming/class reunion	0.0	0.2			
Sporting events	5.8 (60.9)	2.0 (39.1)	7.510	0.006	**
Shows/music concerts	2.0	3.3			
Wedding/family reunion	0.2	0.8			

*p<0.05; **p<0.01; ***p<0.00

[1]The percentage within this paraphrase is the frequency distribution within this activity category.

Table 11: Comparisons of the Use of Information Sources by Gender, (n=189)

	Percentage (%) of Information Source Used		Statistics		
Information source	**Male** (n=72)	**Female** (n=117)	**χ2**	**Sig.**	
www.visitstcloud.com	8.3	7.7			
St. Cloud visitor guide	5.6	6.0			
area/destination newsletter	2.8	0.9			
Magazine advertisement	0.0	0.0			
ExploreMinnesota.com	2.8	3.4			
Travel Information Center	1.4	0.9			
Newspaper	8.3	0.0			
Travel agent	2.8	1.7			
Blogger/Travel YouTuber	0.0	0.0			
Word of mouth	37.5	41.9			
Radio	5.6 (100.0[1])	0.0 (0.0)	6.902	0.009	**
TV	2.8	0.0			
Facebook	5.6 (13.8)	21.4 (86.2)	7.527	0.006	**
Twitter	5.6	1.7			
Google	23.6	23.1			
Instagram	2.8	1.7			
Pinterest	0.0	0.0			
Tripadvisor.com	6.9	6.0			
Expedia	4.2	0.9			
Yelp	1.4	1.7			
Other	29.2	15.4			

*p<0.05; **p<0.01; ***p<0.00

[1]The percentage within this paraphrase is the frequency distribution within this information category.

AGE AND PRIMARY DESTINATION CHOICE

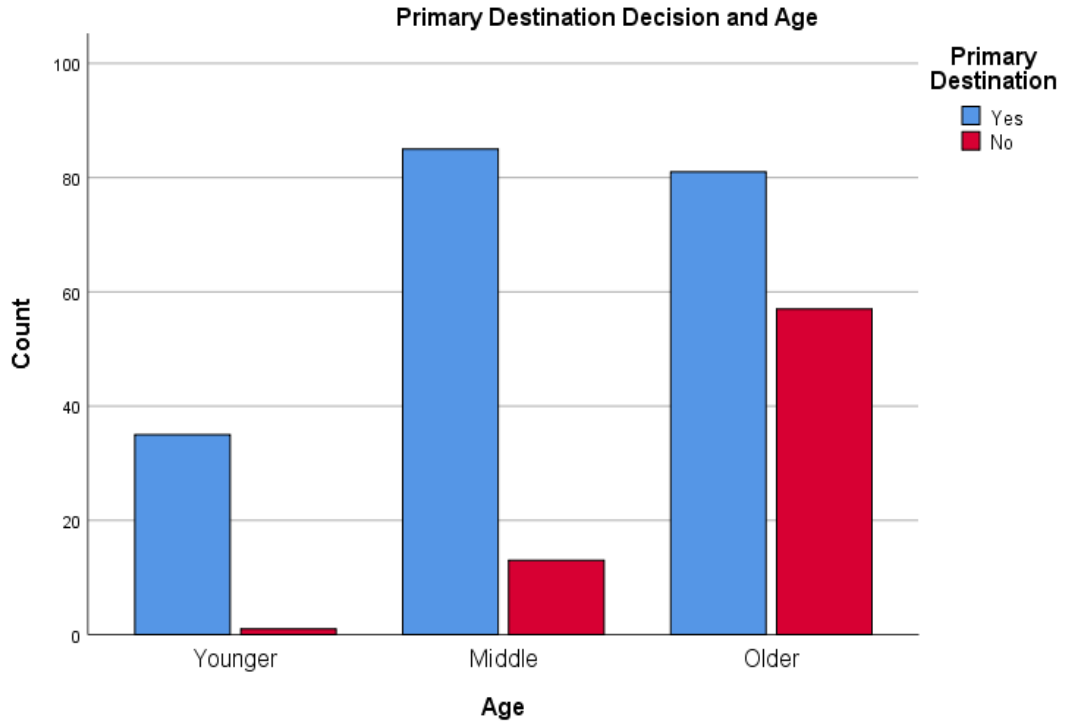
Almost three-fourths of participants stated that the St. Cloud Metro Area was the primary destination for their trip (73.9% vs. 26.1%; χ^2=35.059, p<0.00; see Table 12 and Figure 14), and this answer was true for the majority of participants regardless of age group (97.2% vs. 2.8% for 18-30 year old, 86.7% vs. 13.3% for 31-50 year old, and 58.7% vs. 41.3% for 50+ year old). However, as age increased, participants were proportionally more likely to indicate that the St. Cloud Metro Area was not the primary destination on their trip.

Table 12: The Interrelationship between Age and Primary Destination Choice, (n=272)

	Percentage (%) of St. Cloud as the Primary Destination		Statistics		
	Yes	**No**	**χ2**	**Sig.**	
	(n=201)	(n=71)	35.059	0.000	***
Age Group					
18 - 30 Years Old	97.2	2.8			
31 - 50 Years Old	86.7	13.3			
50+ Years Old	58.7	41.3			

*p<0.05; **p<0.01; ***p<0.00

Figure 14: Primary Destination Decision and Age



AGE AND REASONS FOR VISITING

Reasons for visiting differed significantly by age group (χ^2=68.357, p<0.00; see Table 13 and Figure 15). The most important three reasons for young participants were business (43.8%), campus visits (18.8%), and family events (15.6%) whereas middle-aged participants mainly came for the campus (35.5%), business (31.2%), and family events (11.8%).

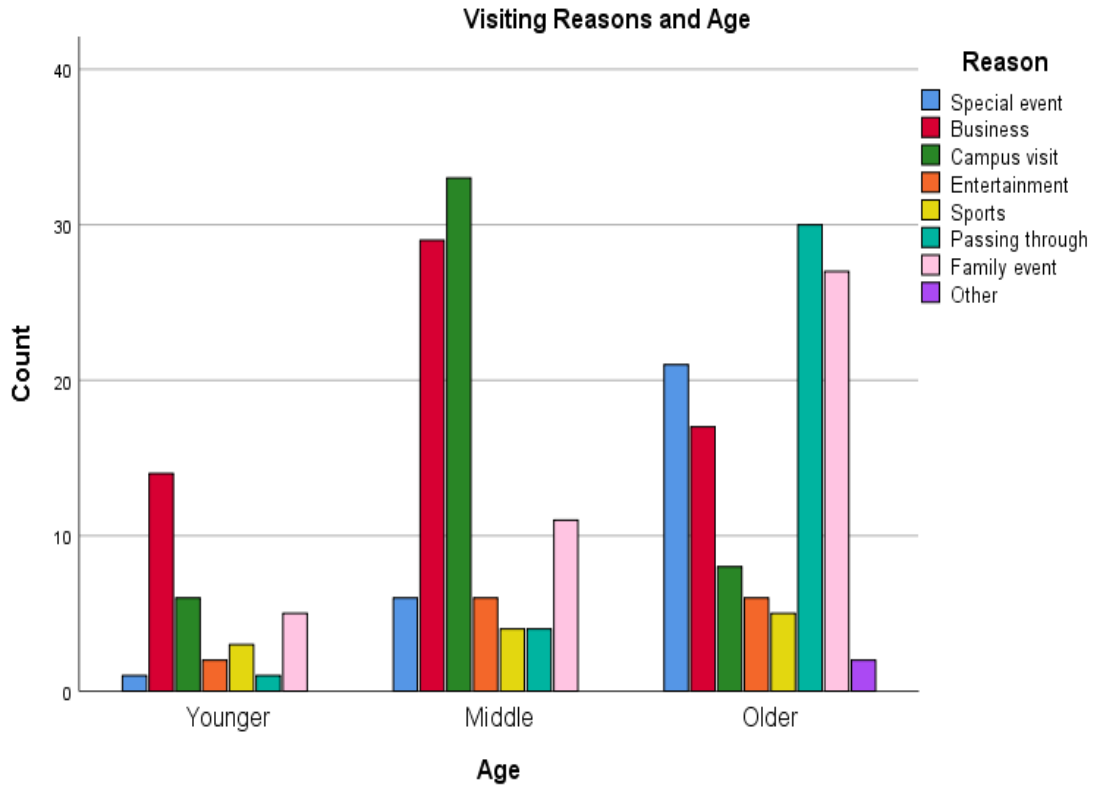
For the older group, simply passing through (25.9%) topped the reasons for coming to the St. Cloud Metro Area, followed by family events (23.3%) and then special events (18.1%). The most common and important reason for visiting across the three age groups was family events (i.e., visiting family and relatives).

Table 13: Comparisons of Reasons for Visiting by Age, (n=241)

	Percentage (%) of Age Group			Statistics	
	Young Group (n = 32)	**Middle Group** (n = 93)	**Old Group** (n = 116)	**$\chi 2$**	**Sig.**
Reason				68.357	0.000***
Special event attending	3.1	6.5	18.1		
Business	43.8	31.2	14.7		
Campus visit	18.8	35.5	6.9		
Entertainment	6.3	6.5	5.2		
Sports	9.4	4.3	4.3		
Passing through	3.1	4.3	25.9		
Family event	15.6	11.8	23.3		
Other	0.0	0.0	1.7		

*p<0.05; **p<0.01; ***p<0.00

Figure 15: Visiting Reasons by Age Group



AGE AND INCOME

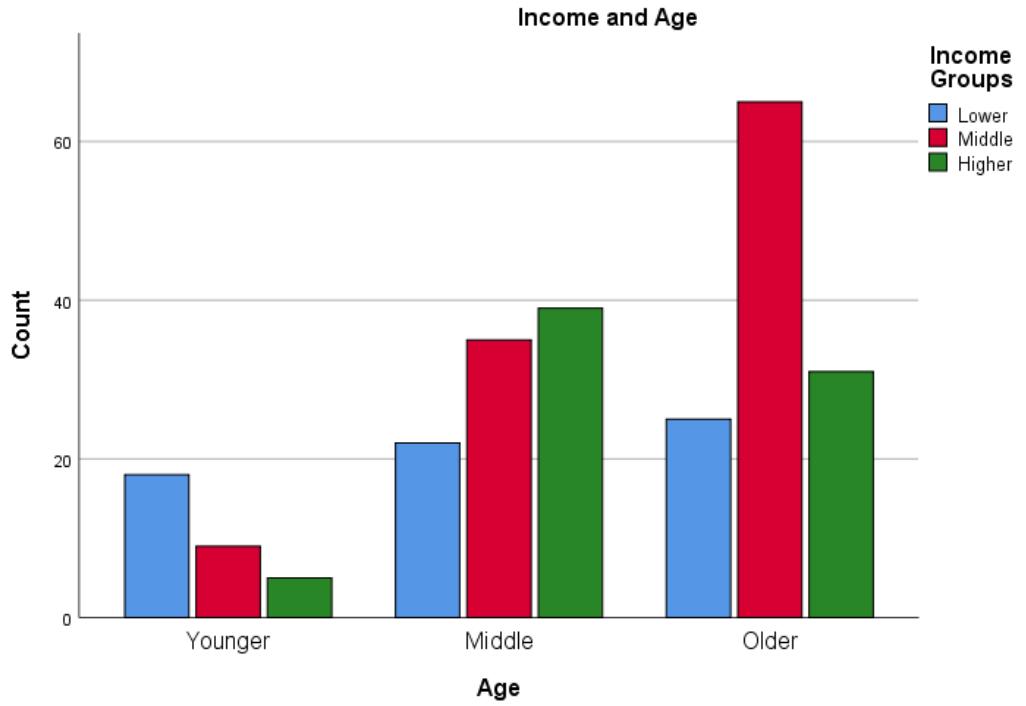
There was a significant interrelationship between age and income (χ^2=25.15, p<0.00, see Table 14 and Figure 16). Specifically, most young participants were in the lower-income group (56.3% vs. 28.1% & 6.7%), most middle-aged participants were in the higher income group (52.0% vs. 22.9% & 36.5%), and most older participants were in the middle-income group (53.7%), followed by the higher income group (41.3%) and the lower-income group (20.7%).

Table 14: The Interrelationship between Age and Income, (n=249)

	Percentage (%) of Age Group			Statistics		
	Young Group, 18-30	**Middle Group, 31-50**	**Old Group, 50+**	**χ2**	**Sig.**	
	(n=32)	(n=96)	(n=121)	25.148	0.000	***
Income Groups						
Lower (< $50,000)	56.3	22.9	20.7			
Middle ($50,000 - $99,999)	28.1	36.5	53.7			
Higher (>$100,000)	6.7	52.0	41.3			

*p<0.05

Figure 16: The Interrelationship between Income and Age



AGE AND NIGHTS STAYED IN THE ST. CLOUD METRO AREA

An analysis of variance (see Table 15) showed that the three age groups spent a significantly different number of nights in the St. Cloud Metro Area, [F (2,270)=6.45, p <0.01].

Post-hoc comparisons using the Bonferroni test indicated that the mean of nights spent in the area for the younger age group (M=3.11, SD=8.04) was significantly different than for the middle-aged group (M=0.91, SD=1.29) and the older group (M=0.97, SD=2.18).

That is, the young group spent significantly more nights in the St. Cloud Metro Area than the other two age groups.

Table 15: Length of Stay in the St. Cloud Metro Area by Age, (n=273)

	Age Groups	n	Mean		SD
Total nights	Younger Group (18-30)	36	3.11	a, b	8.038
	Middle Group (31-50)	99	0.91	a	1.294
	Older Group (51+)	138	0.97	b	2.178

a: $p<0.01$; b: $p<0.01$

AGE AND NUMBER OF TIMES VISITING THE ST. CLOUD METRO AREA

The number of times participants had visited the St. Cloud Metro Area in the past 12 months differed significantly across the three age groups, [F (2,270)=248.83, $p<0.05$] (see Table 16).

Post-hoc comparisons using the Bonferroni test indicated that the mean number of visits in the past year for the older group (M=7.21, SD=9.76) was higher than the younger age group (M=5.89, SD=7.58) and significantly higher than the middle-aged group (M=4.27, SD=8.21).

Comparing the length of overnight stays and the number of visits to the area in a one-year period, we might conclude that older visitors are more likely to come for a day trip than the other two age groups.

Table 16: Number of Visits in the Past Year by Age, (n=273)

	Age Groups	n	Mean		SD
Number of Visits	Younger Group (18-30)	36	5.89		7.577
	Middle Group (31-50)	99	4.27	a	8.214
	Older Group (51+)	138	7.21	a	9.762

a: $p<0.05$

AGE AND ACTIVITY PARTICIPATION

Dining out, shopping, and visiting the college campus were the three most commonly reported activities across the three age groups (see Table 17). Older respondents (57.8%) were significantly more likely to participate in nightlife/evening entertainment ($\chi^2=7.823$, $p<0.05$) than the young (22.2%) and middle-aged respondents (20.0%).

For those who attended meetings during their trips ($\chi^2=6.613$, $p<0.05$), most were in the middle-aged group (54.5%), then the older group (30.3%), and to a lesser extent the younger group (15.2%).

Among those who visited the college campus ($\chi^2=17.012$, $p<0.00$), a slight majority were in the middle-aged group (55.9%), and a fewer number were from the older age group (27.1%) and then the younger age group (16.9%).

The vast majority of participants who reported visiting a museum and/or library ($\chi^2=6.539$, $p<0.05$) during their trip were in the older age group (90.0%) with a much smaller number from the middle-aged group (10.0%) reporting the same.

Table 17: Comparisons of Activities by Age, (n=255)

	Percentage (%) of Age Group			Statistics		
Activity	**Young Group** (n=36)	**Middle Group** (n=95)	**Old Group** (n=124)	**χ2**	**Sig.**	
Dining out	22.40	24.60	22.00			
Health care/medical treatment	0.80	2.20	2.80			
Nightlife/evening entertainment	8.00 (22.2[1])	3.40 (20.0)	5.70 (57.8)	7.823	0.020	*
Shopping	12.80	12.70	13.30			
Sightseeing	9.60	6.50	6.00			
Meeting	4.00 (15.2)	6.70 (54.5)	2.20 (30.3)	6.613	0.037	*
Biking	0.00	0.00	0.70			
Fishing	0.00	1.50	1.70			
Hiking	1.60	0.40	1.50			
Kayaking/canoeing	0.00	0.00	1.30			
Skateboard/BMX	0.00	0.00	0.20			
Other outdoor activities	3.20	3.00	4.30			
Brewery/winery	2.40	3.00	2.20			
Friends/relatives	9.60	6.00	10.70			
College campus	8.00 (16.9)	12.30 (55.9)	3.50 (27.1)	17.012	0.000	***
Museum/library	0.00 (0.0)	0.40 (10.0)	2.00 (90.0)	6.539	0.038	*
Parks	3.20	3.00	3.70			
Festivals/events	6.40	8.20	8.00			
Homecoming/class reunion	0.00	0.00	0.20			
Sporting events	3.20	4.50	3.00			
Shows/music concerts	3.20	1.90	3.30			
Wedding/family reunion	1.60	0.40	1.30	-	-	

*p<0.05;**p<0.01;***p<0.00

[1] The percentage within this paraphrase is the frequency distribution within this activity category.

AGE AND ACCOMMODATION OPTIONS

In terms of the total length of nights at various types of accommodation, there was a significant difference at the p<0.05 level across the three age groups for those who selected the 'Other' option [F(2, 270)=6.22, p<0.05, see Table 18]. The older-aged group would like to stay longer at the other accommodation option than the middle-aged group (0.09 vs. 0.03).

Table 18: Comparisons of Accommodation Usage by Age, (n=273)

	Age Group	n	Mean	*SD*
Accommodations				
Hotel	18-30	36	0.53	0.810
	31-50	99	0.35	1.030
	>50	138	0.59	1.768
Private housing	18-30	36	0.19	1.167
	31-50	99	0.06	0.345
	>50	138	0.01	0.170
Friend's house	18-30	36	0.44	1.423
	31-50	99	0.23	0.913
	>50	138	0.28	0.886
B&B	18-30	36	0.00	0.000
	31-50	99	0.00	0.000
	>50	138	0.00	0.000
Campground	18-30	36	0.00	0.000
	31-50	99	0.00	0.000
	>50	138	0.00	0.000
Other	18-30	36	1.94	8.131
	31-50	99	0.03 [a]	0.302
	>50	138	0.09 [a]	0.734

a: $p<0.05$

AGE AND SPENDING

There was a significant difference in spending at restaurants at the $p<0.05$ level for the three age groups [F(2, 270)=4.00, $p<0.05$, see Table 19]. Post-hoc comparisons using the Bonferroni test indicated that the mean of spending at the restaurants for the middle-aged group (M=$67.91, SD=114.24) was significantly different than the older age group (M=$36.83, SD=60.18).

Table 19: Comparisons of Spending by Age, (n=273)

	Age Group	n	Mean	SD
Spending				
Groceries	18-30	36	0.00	0.00
	31-50	99	15.66	55.48
	>50	138	24.20	88.25

Entertainment	18-30	36	12.22		37.43
	31-50	99	5.91		22.54
	>50	138	7.32		24.21
Lodge	18-30	36	91.83		417.25
	31-50	99	68.48		160.98
	>50	138	22.67		60.81
Recreation	18-30	36	3.67		16.93
	31-50	99	5.66		19.27
	>50	138	1.94		9.38
Restaurant	18-30	36	41.58		71.39
	31-50	99	67.91	a	114.24
	>50	138	36.83	a	60.18
Shopping	18-30	36	88.89		252.73
	31-50	99	54.85		161.27
	>50	138	36.41		82.48
Travel	18-30	36	7.33		17.74
	31-50	99	15.95		32.36
	>50	138	18.12		72.43
Other	18-30	36	2.78		16.67
	31-50	99	3.31		30.25
	>50	138	67.97		540.05
Total spending	18-30	36	248.31		522.17
	31-50	99	237.73		399.72
	>50	138	215.46		594.98

a: $p<0.05$

AGE AND INFORMATION SOURCES

Word of mouth, Google, and 'Other' were the three most commonly reported sources of information for visitors to learn about the St. Cloud Metro Area across the three age groups (see Table 20). However, there was no significant relationship between specific information sources and the three age groups.

Table 20: Comparisons of Information Sources by Age, (n=192)

	Percentage (%) of Total Responses of Information Source Used			Statistics	
Information source	**Young Group** (n=28)	**Middle Group** (n=69)	**Old Group** (n=95)	**χ^2**	**Sig.**
www.visitstcloud.com	7.1	10.1	7.4		
St. Cloud visitor guide	3.6	2.9	8.4		
area/destination newsletter	3.6	0.0	2.1		
Magazine advertisement	0.0	0.0	0.0		
ExploreMinnesota.com	3.6	0.0	5.3		
Travel Information Center	0.0	1.4	1.1		
Newspaper	7.1	1.4	3.2		
Travel agent	3.6	1.4	1.1		
Blogger/Travel YouTuber	0.0	0.0	0.0		
Word of mouth	21.4	39.1	47.4		
Radio	7.1	1.4	1.1		
TV	0.0	0.0	2.1		
Facebook	0.0	21.7	14.7		
Twitter	17.9	0.0	1.1		
Google	28.6	31.9	20.0		
Instagram	10.7	0.0	1.1		
Pinterest	0.0	0.0	0.0		
Tripadvisor.com	0.0	7.2	7.4		
Expedia	0.0	5.8	0.0		
Yelp	0.0	2.9	1.1		
Other	39.3	17.4	16.8		

RESIDENCY AND REASONS FOR VISITING

For doing the residency related analyses, the visitors were categorized into three groups, local (living within a 60-mile radius of the St. Cloud Metro Area), in-state (living outside a 60-mile radius but still within Minnesota), and out-of-state (living outside of Minnesota). Visitors' residency significantly differentiated their primary reasons for visiting the St. Cloud Metro Area (χ^2=107.466, p<0.00; see Table 21 and Figure 17).

For local residents, the top three reasons for visiting the St. Cloud Metro Areas were the college campus (26.4%), business (19.8%), and special events (19.8%).

For in-state visitors, business (45.7%) was by far the most common reason for visiting. For out-of-state visitors, visiting friends & family (54.5%) was the predominant reason, followed by

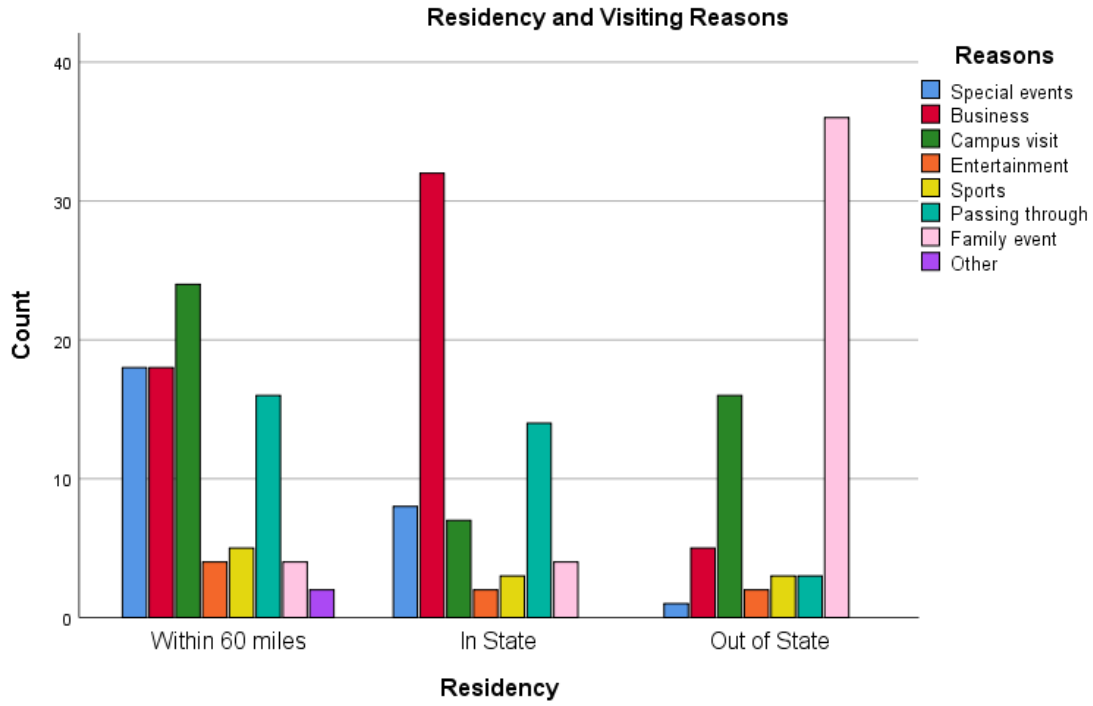
visiting the college campus (24.2%) and visiting for business-related purposes (7.6%). In short, reasons for visiting depended on visitors' residency status in this study.

Table 21: Reasons for Visiting by Residency, (n=227)

	Percentage (%) of Age Group			Statistics	
	Local (n = 91)	**In-State** (n = 70)	**Out-of-State** (n = 66)	**χ^2**	**Sig.**
Reason				107.466	0.000***
Special event attending	19.8	11.4	1.5		
Business	19.8	45.7	7.6		
Campus visit	26.4	10.0	24.2		
Entertainment	4.4	2.9	3.0		
Sports	5.5	4.3	4.5		
Passing through	17.6	20.0	4.5		
Family event	4.4	5.7	54.5		
Other	2.2	0.0	0.0		

*p<0.05; **p<0.01; ***p<0.00

Figure 17: The Interrelationship between Participants' Residency and Reasons



RESIDENCY AND NUMBER OF VISITS IN THE PAST YEAR

There was a significant difference at the p<.05 level regarding the number of visits to the St. Cloud Metro Area in the past year for the three residency groups [F(2, 255)=12.997, p<0.03]. Local respondents (M=8.65, SD=11.40) visited the area more often than the in-state residents (M=6.11, SD=8.71), followed by the out-of-state respondents (M=1.71, SD=1.71).

The relationships between visitors' residency and their length of stay at hotels/motels [F(2, 255)=9.862, p<0.00] and friends' houses [F(2, 255)=7.947, p<0.00] were statistically significant. Out-of-state visitors (M=1.04, SD=2.79) stayed at hotels/motels for more nights on average than in-state visitors (M=0.64, SD=0.92) and locals (M=0.09, SD=0.32. Likewise, out-of-staters (M=0.67, SD=1.53) spent more nights at friends' and relatives' homes than the local group did (M=0.08, SD=0.43).

There were significant differences in spending on lodging [F(2, 255)=4.569, p<0.05], restaurants [F(2, 255)=10.411, p<0.00], and travel-related items [F(2, 255)=4.308, p<0.05] at the p<0.05 level for the three residency groups. In terms of spending on lodging services, the local group (M=$5.98, SD=26.54) spent significantly less than the in-state group (M=$74.28, SD=137.78]) and the out-of-state group (M=$82.23, SD=296.17).

With regards to spending at restaurants, the out-of-state group (M=$74.79, SD=82.52) significantly outspent the local group (M=$20.08, SD=33.51) as well as the in-state group (M=$60.58, SD=117.37). As for travel-related expenses, the out-of-staters (M=$31.78, SD=91.08) spent significantly more than the locals (M=$6.48, SD=18.69).

Table 22: Comparisons of Trip Details and Expenditures by Residency, (n=258)

	Residency Group	n	Mean		SD
Number of Visits in Past Year	Local	100	8.65	a	11.399
	In-State	85	6.11	b	8.707
	Out-of-State	73	1.71	a, b	1.705
Group size	Local	100	2.31		1.346
	In-State	85	2.66		3.209
	Out-of-State	73	2.47		1.415
Average age	Local	99	49.67		15.586
	In-State	85	48.98		18.212
	Out-of-State	71	53.48		15.580
Total nights	Local	100	0.96		4.967
	In-State	85	1.02		1.300
	Out-of-State	73	2.03		2.794
Spending					
Total	Local	100	162.73		646.380
	In-State	85	253.96		428.602
	Out-of-State	73	306.48		463.331

Groceries	Local	100	11.25		44.115
	In-State	85	13.53		50.082
	Out-of-State	73	35.62		114.803
Entertainment	Local	100	3.80		15.491
	In-State	85	10.29		31.832
	Out-of-State	73	6.85		26.187
Lodge	Local	100	5.98	g, h	26.535
	In-State	85	74.28	h	173.784
	Out-of-State	73	82.23	g	296.166
Recreation	Local	100	2.16		9.095
	In-State	85	5.52		18.856
	Out-of-State	73	3.84		16.966
Restaurant	Local	100	20.08	i, j	33.511
	In-State	85	60.58	i	117.371
	Out-of-State	73	74.79	j	82.519
Shopping	Local	100	22.70		50.249
	In-State	85	65.29		183.040
	Out-of-State	73	71.37		186.833
Travel	Local	100	6.48	k	18.685
	In-State	85	15.59		45.220
	Out-of-State	73	31.78	k	91.075
Other	Local	100	90.28		633.140
	In-State	85	8.88		47.097
	Out-of-State	73	0.00		0.00
Accommodation (Number of nights)					
Hotel	Local	100	0.09	c, d	0.321
	In-State	85	0.64	c	0.924
	Out-of-State	73	1.04	d	2.794
Private housing	Local	100	0.09		0.726
	In-State	85	0.02		0.217
	Out-of-State	73	0.05		0.329

Friend/family housing	Local	100	0.08	e	0.422
	In-State	85	0.24	f	0.826
	Out-of-State	73	0.67	e, f	1.528
B & B	Local	100	0.00		0.000
	In-State	85	0.00		0.000
	Out-of-State	73	0.00		0.000
Campground	Local	100	0.00		0.000
	In-State	85	0.00		0.000
	Out-of-State	73	0.00		0.000
Other	Local	100	0.70		4.925
	In-State	85	0.12		0.822
	Out-of-State	73	0.08		0.595

a: $p<0.00$; b: $p<0.05$; c: $p<0.05$; d: $p<0.00$; e: $p<0.01$; f: $p<0.05$; g: $p<0.05$; h:$p<0.05$; i: $p<0.01$; j: $p<0.00$; k: $p<0.05$

RESIDENCY AND DESTINATION INFORMATION SOURCES

Word of mouth, Google search engine, and Facebook were the most common information sources for visitors across the three residency groups, local, in-state, and out-of-state (see Table 23). Moreover, residency significantly differentiated the use of magazine advertisements and 'other' information sources (χ^2=6.178, $p<0.05$; χ^2=12.173, $p<0.01$).

Only in-state residents reported obtaining information from an area/destination newsletter (100.0% vs. 0.0% vs. 0.0%), and they were also more likely to obtain visitor information from 'other' sources than out-of-state and local residents (57.1% vs. 25.7% vs. 17.1%, respectively).

Table 23: Comparisons of Information Sources by Residency, (n=185)

	Percentage (%) of Information Source Used			Statistics		
Information source	**Local (within 60-mile radius)** (n=61)	**In-State (outside 60-mile radius)** (n=69)	**Out of State** (n=55)	**χ^2**	**Sig.**	
www.visitstcloud.com	13.1	2.9	10.9			
St. Cloud Visitor Guide	1.6	7.2	10.9			
Area/destination newsletter	0.0 (0.0)	4.3 (100.0)	0.0 (0.0)	6.178	0.046	*
Magazine advertisement	0.0	0.0	0.0			

ExploreMinnesota.com	1.6	2.9	5.5			
Travel Information Center	1.6	1.4	0.0			
Newspaper	4.9	4.3	0.0			
Travel agent	0.0	4.3	1.8			
Blogger/Travel YouTuber	0.0	0.0	0.0			
Word of mouth	42.6	33.3	45.5			
Radio	1.6	4.3	0.0			
TV	0.0	2.9	0.0			
Facebook	19.7	15.9	10.9			
Twitter	1.6	4.3	3.6			
Google	19.7	26.1	29.1			
Instagram	1.6	2.9	1.8			
Pinterest	0.0	0.0	0.0			
Tripadvisor.com	4.9	4.3	10.9			
Expedia	1.6	0.0	5.5			
Yelp	0.0	1.4	3.6			
Other	9.8 (17.1)	29.0 (57.1)	16.4 (25.7)	12.173	0.002	**

*p<0.05; **p<0.01; ***p<0.00

RESIDENCY AND ACTIVITY

For all three residency groups combined (see Table 24), the most popular activities were dining out (22.8%), shopping (12.8%), and visiting family/friends (9.2%).

Specifically, the three residency groups differentiated significantly according to their engagement in the following activities: dining out (χ^2=12.741, p<0.01), sightseeing (χ^2=6.362, p<0.05), hiking (χ^2=13.602, p<0.01), visiting family/friends (χ^2=20.360, p < 0.00); visiting/touring the college campus (χ^2=11.022, p<0.01), and attending special events/festivals (χ^2=12.623, p<0.01).

About 22.8% of total participants said that they dined out during their visit, and this was fairly evenly reported across the three residency groups (32.1% for locals, 35.3% for in-state residents, and 32.6% for out-of-state residents).

About 12.8% of total participants went sightseeing in the St. Cloud Metro Area, most of who were from the out-of-state group (41.4%), followed by the local group (32.8%), and then the in-state group (25.9%).

Hiking was not a common activity for any of the three residency groups, as only 1.5% of participants reported that they participate in this activity during their trip, about 75% of whom lived outside of Minnesota.

About 9.2% of total participants reported that they visited friends and relatives, including out-of-staters (48.0%), locals (26.7%), and in-staters (25.3%).

Table 24: Comparisons of Activities by Residency, (n=240)

	Percentage (%) of activity participation			Statistics		
Activity	**Local Group** (n=92)	**In-State Group** (n=81)	**Out-of-State Group** (n=67)	**χ^2**	**Sig.**	
Dining out	64.1 (32.1[1])	80.2 (35.3)	89.6 (32.6)	12.741	0.002	**
Health care/medical treatment	12.0	6.2	6.0			
Nightlife/evening entertainment	16.3	17.3	19.4			
Shopping	38.0	38.3	56.7			
Sightseeing	20.7 (32.8)	18.5 (25.9)	35.8 (41.4)	6.362	0.042	*
Meeting	13.0	14.8	11.9			
Biking	2.2	1.2	0.0			
Fishing	2.2	1.2	13.4			
Hiking	3.3 (27.3)	3.7 (27.3)	7.5 (45.5)	13.602	0.001	**
Kayaking/canoeing	3.3	1.2	3.0			
Skateboard/BMX	1.1	0.0	0.0			
Other outdoor activities	14.1	12.3	11.9			
Brewery/winery	5.4	9.9	13.4			
Friends/relatives	21.7 (26.7)	23.5 (25.3)	53.7 (48.0)	20.360	0.000	***
College campus	28.3 (44.8)	11.1 (15.5)	34.3 (39.7)	11.022	0.004	**
Museum/library	3.3	2.5	9.0			
Parks	12.0	11.1	14.9			
Festivals/events	29.3 (41.5)	37.0 (46.2)	11.9 (12.3)	12.623	0.002	**
Homecoming/class reunion	1.1	0.0	0.0			
Sporting events	10.9	4.9	13.4			
Shows/music concerts	15.2	6.2	7.5			
Wedding/family reunion	4.3	1.2	6.0			

*p<0.05; **p<0.01; ***p<0.00

[1]The percentage within this paraphrase is the frequency distribution within this activity category.

Visiting the college campus was an activity reported by around 6.7% of total participants, most of whom were locals (44.8%), followed by out-of-state (39.7%) and in-state residents (15.5%).

About a quarter of those surveyed attended festivals or special events (8.2%) during their trip to the St. Cloud Metro Area. This activity was popular for in-staters (46.2%) and locals (41.5%), and less so for out-of-staters (12.3%).

INCOME LEVEL AND REASONS FOR VISITING

The reasons for visiting the St. Cloud Metro Area differed significantly among the three income groups (χ^2=27.204, p<0.05; see Table 25 and Figure 18).

Business, the college campus, and friends/family were the three most common reasons for visiting the St. Cloud Metro Area, but their frequency levels across the three income groups varied.

Business-related travel (28.8% of total responses) was the most common reason given by those with household incomes of less than $50,000 (lower income group) while family-related travel (20.0%) was the most popular reason for those with household incomes in the range of $50,000-$99,999 (middle-income group).

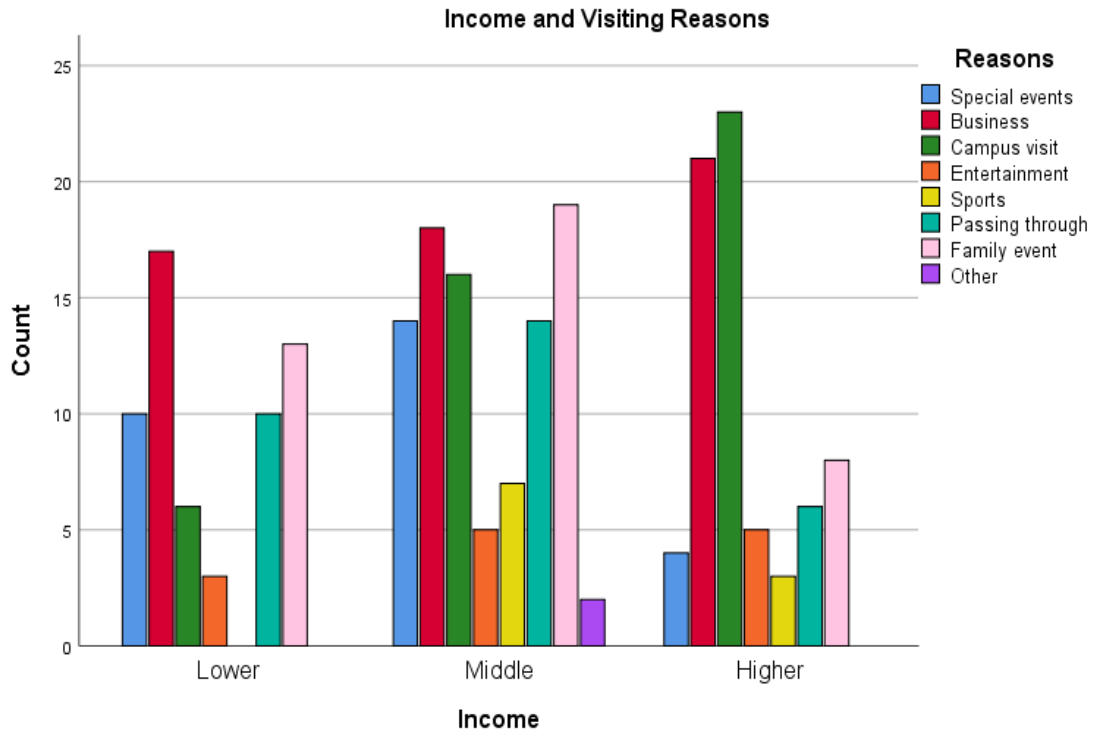
For those who had a household income of more than $100,000 (higher income group), visiting the college campus visit (32.9%) was the most commonly reported reason.

Table 25: Comparisons of Reasons for Visiting by Income, (n=224)

	Percentage (%) of Reason			Statistics		
	Less than $50,000	**$50,000-$99,999**	**More than $100,000**	**χ^2**	**Sig.**	
Visiting Reason	(n=59)	(n=95)	(n=70)	27.204	0.018	*
Special event attending	16.9	14.7	5.7			
Business	28.8	18.9	30.0			
Campus visit	10.2	16.8	32.9			
Entertainment	5.1	5.3	7.1			
Sports	0.0	7.4	4.3			
Passing through	16.9	14.7	8.6			
Family event	22.0	20.0	11.4			
Other	0.0	2.1	0.0			

*p<0.05;**p<0.01;***p<0.00

Figure 18: The Interrelationship between Income and Reasons



INCOME LEVEL AND SPENDING, VISITING FREQUENCY, GROUP SIZE, AND LENGTH OF STAY

A one-way analysis of variance between subjects (see Table 26) was conducted to compare participants' characteristics and trip details across three different income groups (lower, middle, and higher), including average age, frequency of annual visits, group size, and length of stay (total number of nights spent), accommodation type, and expenses (total and per spending category). Significant differences were found at the $p<0.05$ level for average age [$F(2, 246)=9.73$, $p<0.00$] and length of stay [$F(2, 248)=3.62$, $p=0.02$], as well as—specifically—number of nights spent at family/friends' houses [$F(2, 248)=3.27$, $p=0.04$], and 'other' accommodation options [$F(2, 248)=3.10$, $p=0.04$].

Later, Post-hoc comparisons using the Bonferroni test indicated that the mean of average age for the middle-income group (M=54.25, SD=15.36) was significantly higher than for the lower-income group (M=43.55, SD=19.23). Post-hoc comparisons also indicated that the lower-income group (M=2.14, SD=6.12) stayed significantly longer on average than the higher income group (M=0.66, SD=1.16). The lower-income group spent more nights at family/friends' houses (M=0.53, SD=1.45) than the higher income group (M=0.11, SD=0.67).

However, for miscellaneous accommodation usage indicated by participants who selected 'Other,' Post-hoc comparisons revealed no significant difference between any of the three income groups even though it was significant in the combined effects.

Taken together, these results suggest that the lower-income group tends to be younger and stay more nights in the St. Cloud Metro Area than the other two income level groups.

Table 26: Comparisons of Trip Details and Expenditures by Income, (n=251)

	Income Group	n	Mean		SD
Number of Visits in Past Year	Lower Income	66	6.55		10.054
	Middle Income	109	5.99		8.065
	Higher Income	76	5.46		9.694
Group size	Lower Income	66	2.29		1.31
	Middle Income	109	2.39		2.77
	Higher Income	76	3.05		3.81
Average age	Lower Income	65	43.55	a	19.23
	Middle Income	109	54.25	a	15.36
	Higher Income	75	49.53		11.66
Total nights	Lower Income	66	2.14	b	6.12
	Middle Income	109	1.05		1.66
	Higher Income	76	0.66	b	1.16
Spending Total	Lower Income	66	220.79		418.53
	Middle Income	109	294.49		713.55
	Higher Income	76	192.88		278.39
Groceries	Lower Income	66	28.94		80.73
	Middle Income	109	18.17		86.34
	Higher Income	76	12.83		43.30
Entertainment	Lower Income	66	9.32		22.46
	Middle Income	109	5.69		26.92
	Higher Income	76	9.21		29.11
Lodging	Lower Income	66	33.80		107.52
	Middle Income	109	71.28		272.92
	Higher Income	76	38.16		72.51
Recreation	Lower Income	66	2.85		11.66
	Middle Income	109	5.39		18.48
	Higher Income	76	2.43		13.05
Restaurant	Lower Income	66	40.20		72.23

	Middle Income	109	58.96		101.31
	Higher Income	76	50.55		78.21
Shopping	Lower Income	66	78.18		195.44
	Middle Income	109	31.65		66.90
	Higher Income	76	66.38		188.60
Travel	Lower Income	66	16.89		46.79
	Middle Income	109	20.78		75.73
	Higher Income	76	11.89		29.26
Other	Lower Income	66	10.61		53.00
	Middle Income	109	82.57		606.73
	Higher Income	76	1.42		7.56
Accommodation					
Hotel	Lower Income	66	0.27		0.54
	Middle Income	109	0.61		1.27
	Higher Income	76	0.45		0.74
Private housing	Lower Income	66	0.17		0.92
	Middle Income	109	0.04		0.27
	Higher Income	76	0.00		0.00
Friend/family housing	Lower Income	66	0.53	c	1.45
	Middle Income	109	0.27		0.84
	Higher Income	76	0.11	c	0.67
B & B	Lower Income	66	0.00		0.00
	Middle Income	109	0.00		0.00
	Higher Income	76	0.00		0.00
Campground	Lower Income	66	0.00		0.00
	Middle Income	109	0.00		0.00
	Higher Income	76	0.00		0.00
Other	Lower Income	66	1.17		6.09
	Middle Income	109	0.01		0.10
	Higher Income	76	0.11		0.67

a: $p<0.05$; b: $p<0.05$; c: $p<0.05$

INCOME LEVEL AND ACTIVITY

The three most popular activities across all household income level groups (lower, middle, and higher, see Table 27) were dining out (22.8%), shopping (12.8%), visiting family/friends (9.2%), and festivals/events (8.2%).

Specifically, the three income groups were significantly differentiated according to activity participation, including health care and medical treatments (χ^2=9.387, p<0.01), shopping (χ^2=13.212, p<0.01), other outdoor activities (χ^2=8.991, p<0.05), visiting family/friends (χ^2=12.418, p<0.05); visiting the college campus (χ^2=11.319, p<0.05), and attending special events/festivals (χ^2=9.590, p<0.05).

Table 27: Comparisons of Activities by Income, (n=240)

	Percentage (%) of activity participation			Statistics		
Activity	**Lower Income** (n=61)	**Middle Income** (n=104)	**Higher Income** (n=71)	**χ2**	**Sig.**	
Dining out	24.0	46.4	29.6			
Health care/medical treatment	55.0	30.0	15.0	9.387	0.009	**
Night life/evening entertainment	38.1	45.2	16.7			
Shopping	37.0	34.0	29.0	13.212	0.010	
Sightseeing	30.2	41.5	28.3			
Meeting	12.9	51.6	35.5			
Biking	0.0	66.7	33.3			
Fishing	25.0	58.3	16.7			
Hiking	50.0	20.0	30.0			
Kayaking/canoeing	0.0	83.3	16.7			
Skateboard/BMX	0.0	0.0	0.0			
Other outdoor activities	25.9	66.7	7.4	8.991	0.011	*
Brewery/winery	19.0	52.4	28.6			
Friends/relatives	33.8	52.1	14.1	12.418	0.002	**
College campus	20.8	30.2	49.1	11.319	0.003	*
Museum/library	25.0	50.0	25.0			
Parks	28.6	53.6	17.9			
Festivals/events	40.3	40.3	19.4	9.590	0.008	*
Homecoming/class reunion	0.0	100.0	0.0			
Sporting events	7.7	53.8	38.5			
Shows/music concerts	31.8	45.5	22.7			
Wedding/family reunion	0.0	71.4	28.6			

*p<0.05;**p<0.01;***p<0.00

Among all the visitors who came to the St. Cloud Metro Area for health care/medical treatment (2.6% of all responses), lower-income visitors (55.0%) were significantly more represented than middle income (30.0%) and higher-income visitors (15.0%).

In terms of shopping (12.8% of total responses), the lower-income group was again most prevalent (37.0%), followed by the middle-income group (34.0%) and the lower-income group (29.0%).

Of the relatively small number of visitors who participated in or planned to participate in 'other outdoor activities' (3.5% of total responses), the middle-income group was clearly the majority (66.7%), followed by the lower-income group (25.9%) and the higher income group (7.4%).

For those who indicated that they had or would visit family and/or friends (9.1% of all responses) during their trip, the middle-income group was most represented (52.1%), followed by the lower-income group (33.8%) and the higher-income group (14.1%).

The result also showed that 6.8% of total respondents had visited/toured or planned to visit/tour the college campus during their trip to the St. Cloud Metro Area. The higher income visitors were significantly more likely to visit/tour the campus (49.1%) than the middle income (30.2%) and lower-income visitors (20.8%).

In addition, 7.9% of all survey participants reported that they had gone to or would go to festivals or special events during their trip. Both the middle-income group (40.3%) and the lower-income group (40.3%) were more likely to go to festivals and/or special events than the higher income group (19.4%).

INCOME LEVEL AND DESTINATION INFORMATION SOURCES

Table 28 reveals that word of mouth (used by 40.4% of total respondents) was the most common source of visitor information on the St. Cloud Metro Area. This was followed by Google searches (25.7%) and 'other' information sources (20.2%).

Table 28: Comparisons of Information Sources by Income, (n=183)

	Percentage (%) of Information Source Used			Statistics		
Information source	**Lower Income** (n=56)	**Middle Income** (n=83)	**Higher Income** (n=44)	**χ^2**	**Sig.**	
www.visitstcloud.com	8.93	6.02	9.09			
St. Cloud visitor guide	7.14	3.61	2.27			
area/destination newsletter	5.36 (100.0)	0.00 (0.0)	0.00 (0.0)	8.511	0.014	*
Magazine advertisement	0.00	0.00	0.00			
ExploreMinnesota.com	3.57	2.41	0.00			
Travel Information Center	0.00	2.41	0.00			
Newspaper	5.36	3.61	0.00			

Travel agent	3.57	2.41	0.00			
Blogger/Travel YouTuber	0.00	0.00	0.00			
Word of mouth	39.29 (29.7)	49.40 (55.4)	25.00 (14.9)	12.173	0.002	**
Radio	5.36	1.20	0.00			
TV	1.79	1.20	0.00			
Facebook	17.86	15.66	13.64			
Twitter	7.14	2.41	0.00			
Google	17.86	25.30	36.36			
Instagram	5.36	1.20	0.00			
Pinterest	0.00	0.00	0.00			
Tripadvisor.com	3.57	8.43	6.82			
Expedia	0.00	4.82	0.00			
Yelp	1.79	2.41	0.00			
Other	17.86 (27.0)	12.05 (27.0)	38.64 (45.9)	6.214	0.045	*

*p<0.05; **p<0.01; ***p<0.00

Dividing participants into lower-, middle-, and higher-income groups showed that income level significantly differentiated the use of area/destination newsletters (χ^2=8.511, p<0.05), word of mouth (χ^2=12.173, p<0.01), and 'other' information sources (χ^2=6.214, p<0.05). Area/destination newsletters were only used by a few visitors who were all in the lower-income group (100% vs. 0.0% vs. 0.0%). Of the 30% of total participants who indicated that they used word of mouth to plan their trips, the majority were from the middle-income group (55.4%), with the rest split unevenly between the lower income group (29.7%) and the higher income group (14.9%). Conversely, the higher income group was much more likely to use 'other' sources of travel information (45.9%) than their lower (27.0%) and middle income (27.0%) counterparts

VISITORS' OPINIONS ON THE ST CLOUD METRO AREA

Based on the findings, visitors indicated that they were satisfied with their travel experiences in the St. Cloud Metro Area.

Table 29: Visitors' Opinions on Their Travel Experiences in the St. Cloud Metro Area

Revisit Intention	Percent	Recommendation	Percent	Satisfaction	Percent
Extremely Likely	65.3%	Strongly Recommend	60.7%	Very Satisfied	64.4%
Somewhat Likely	10.9%	Somewhat Recommend	16.2%	Satisfied	16.9%
Neutral	10.6%	Neutral	18.0%	Neutral	16.9%
Somewhat Unlikely	5.5%	Somewhat Not Recommend	4.0%	Dissatisfied	1.9%
Extremely Unlikely	7.7%	Strongly Not Recommend	1.1%	Very Dissatisfied	0.0%

Moreover, they would likely recommend the area as a destination to other potential visitors as well as revisit the area again themselves in the future (see Table 29, Figure 19, Figure 20, and Figure 21).

Figure 19: Visitors' Intentions to Revisit the St. Cloud Metro Area

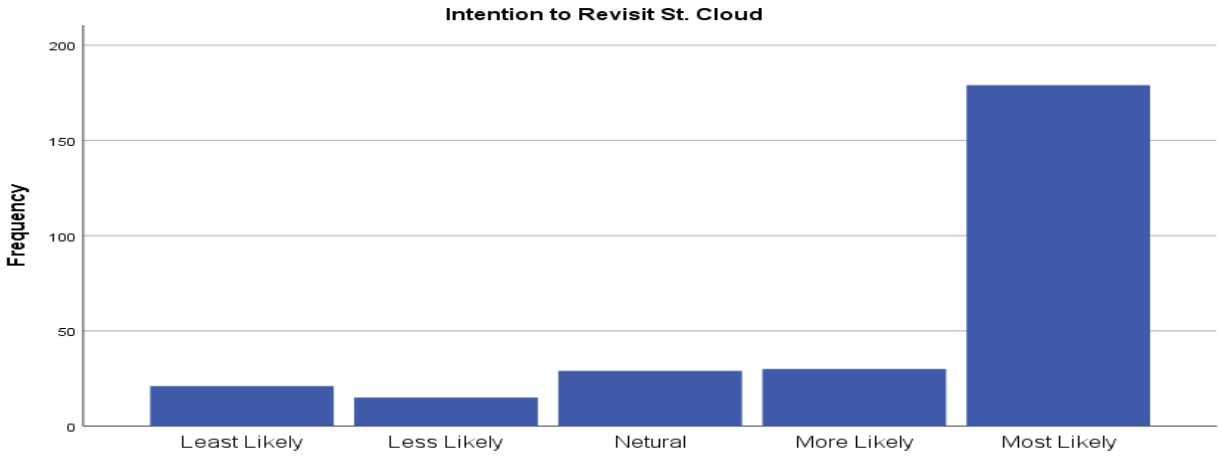


Figure 20: Visitors' Recommendations of the St. Cloud Metro Area to Other Visitors

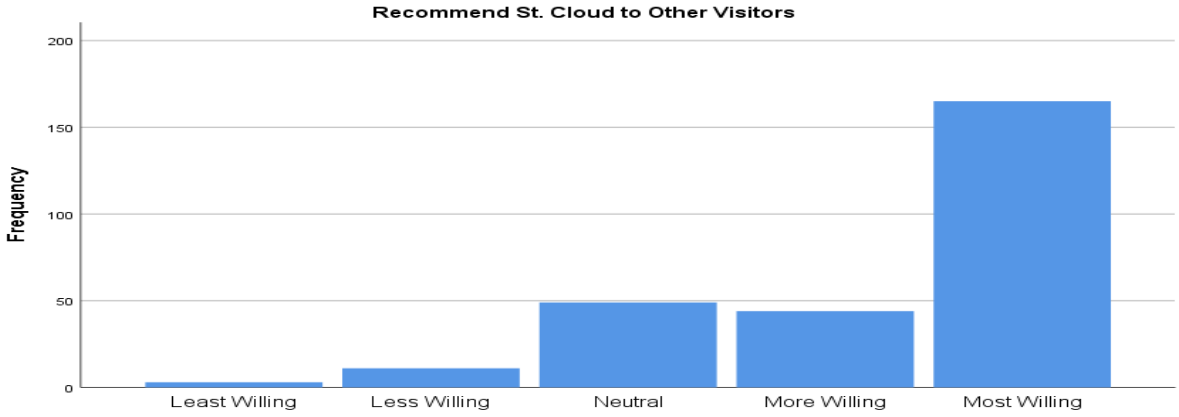
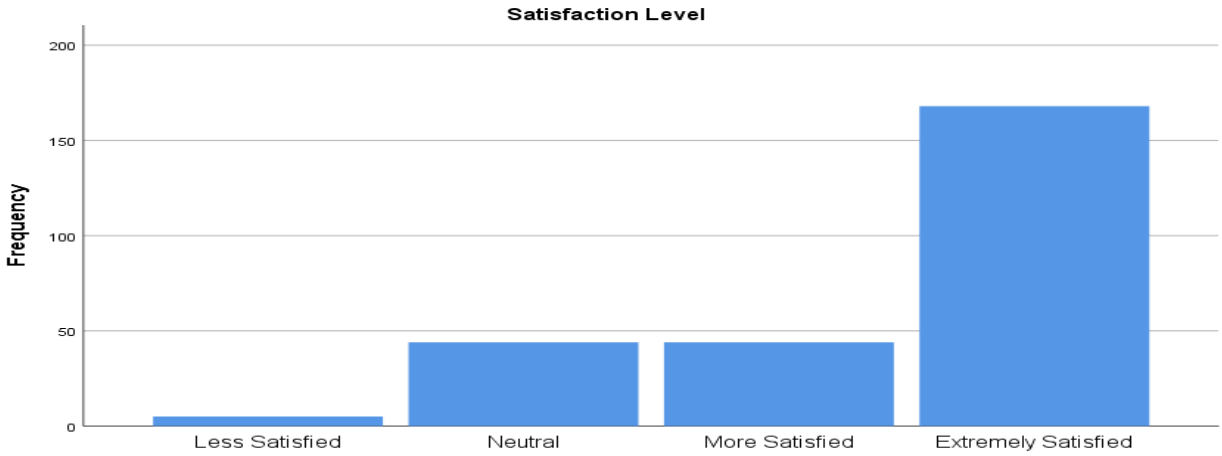


Figure 21: Visitors' Satisfaction Levels



VISITOR'S COMMENTS AND SUGGESTIONS

Respondents were asked if they had comments or suggestions regarding their trip to the St. Cloud Metro Area. Common themes for fall 2019 include: The airport is convenient, as is the free parking; visitors frequently come to the area for events, entertainment, and shopping options; and people are hospitable. Please find more details about respondents' comments and suggestions in Appendix B.

VISITORS' SPENDING HABITS

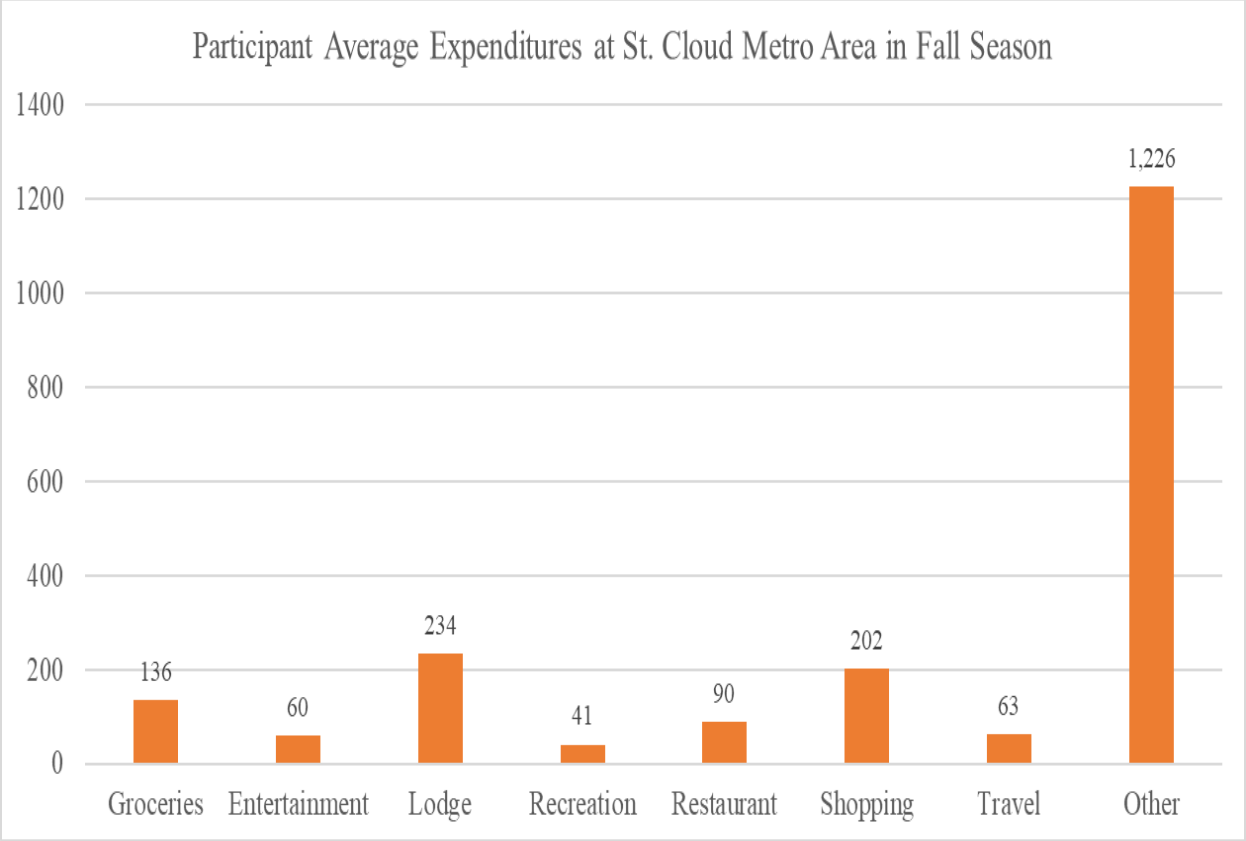
According to the expenditure information below (see Table 30 & Figure 22), visitors spent money on various categories when they visited the St. Cloud Metro Area. Just over half of the visitors spent their money at restaurants. Almost one-fourth spent money on travel-related purchases.

Visitors also spent their money on shopping (23.2%), groceries (12.3%), and entertainment (11.6%). Relatively few visitors paid for lodging (19.5%), which is perhaps to be expected since just about 39% of the respondents came from within a 60-mile day-trip radius. In order of largest expenses, the participants in this study spent medians of $150 on lodging, $100 on shopping, $75 on groceries, $40 on entertainment, and $50 on restaurants.

Table 30: Participants' Expenditures in the St. Cloud Metro Area, (n=293)

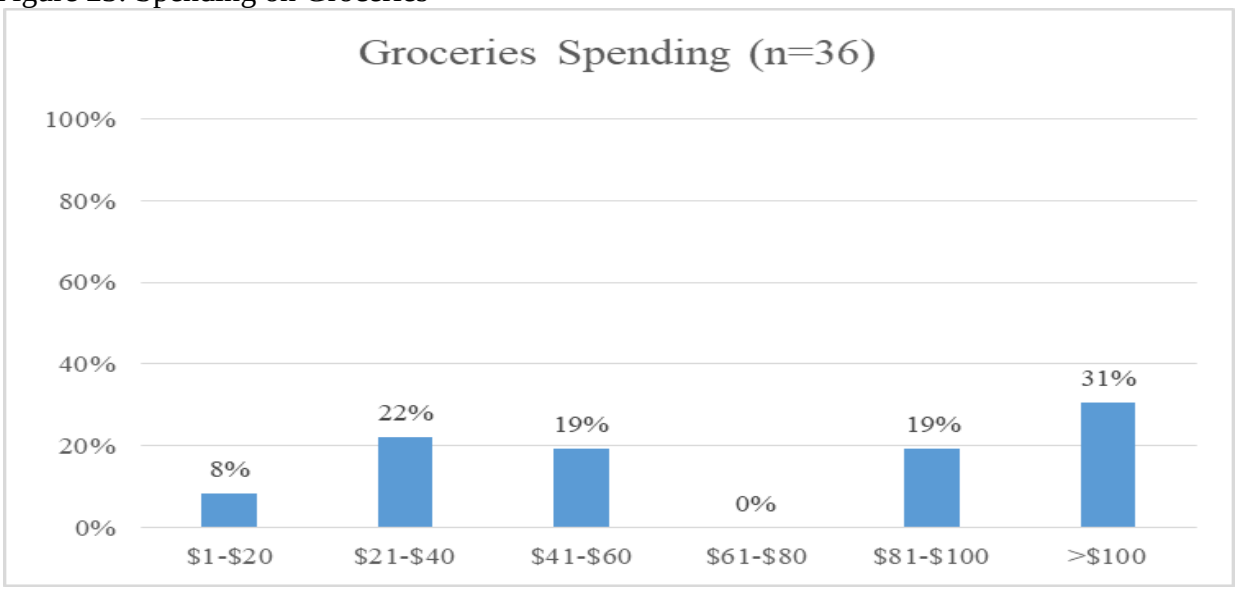
	Spent at least $1.00		Descriptive statistics of participants spending at least $1.00		
	Yes	**No**	**Mean ($)**	**Median ($)**	***SD***
Spending categories					
Groceries	12.29%	87.71%	136.11	75.00	151.83
Entertainment	11.60%	88.40%	59.85	40.00	47.20
Lodge	19.45%	80.55%	233.60	150.00	350.46
Recreation	9.22%	90.78%	41.11	25.00	31.07
Restaurant	51.54%	48.46%	89.62	50.00	99.59
Shopping	23.21%	76.79%	202.28	100.00	235.29
Travel	23.89%	76.11%	63.04	37.50	95.47
Other	2.73%	97.27%	1226.00	200.00	2023.78

Figure 22: Participants' Average Expenditures in the St. Cloud Metro Area (n=293)



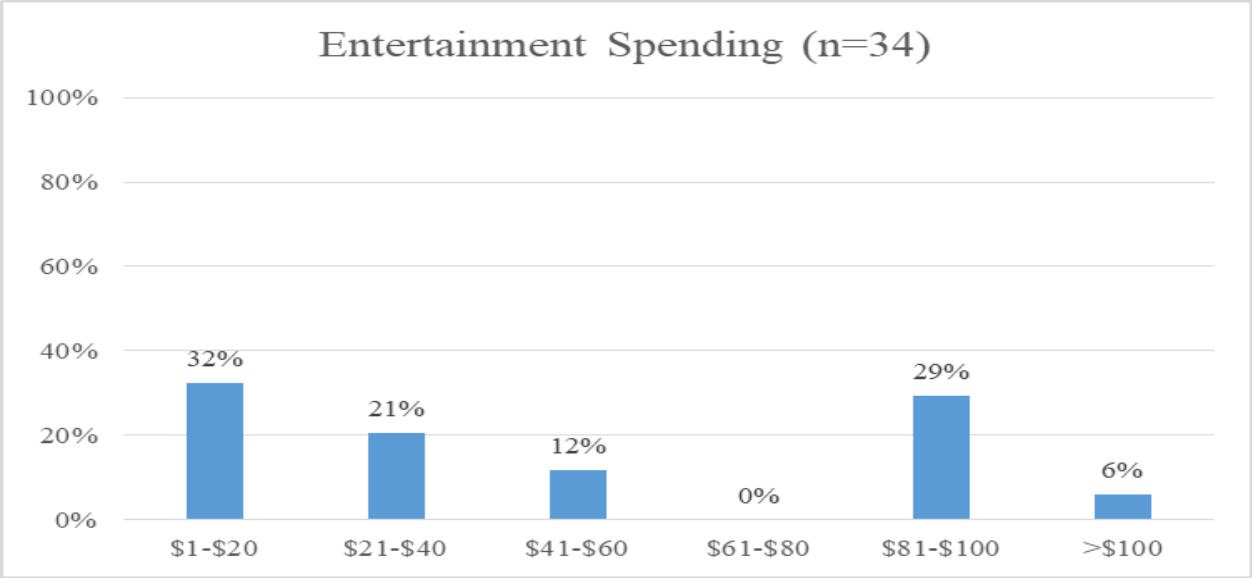
As Figure 23 illustrates, among respondents (12.29% of total) who spent at least one dollar on groceries, 30.6 percent spent more than $100, 22.2 percent spent $21-40, 19.4 percent spent $41-60, 19.4 percent spent $81-100, and 8 percent spent $1-20. The average spending on groceries was $136.11 and the median amount of spending on groceries was $75.

Figure 23: Spending on Groceries



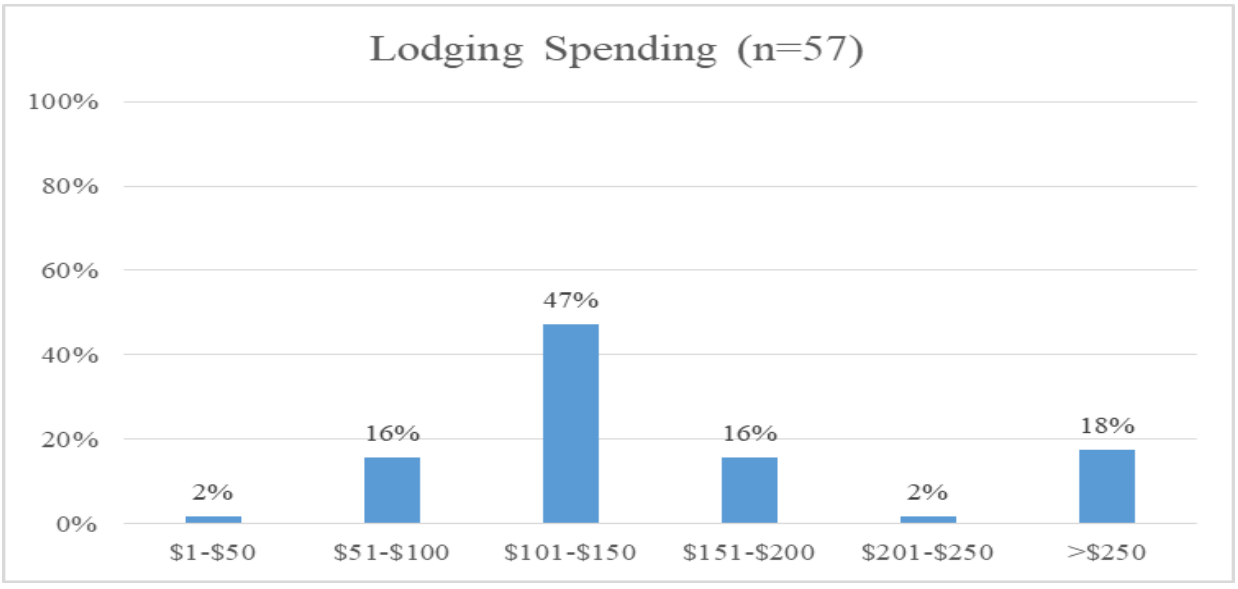
Among respondents who spent at least one dollar on entertainment in the St. Cloud Metro Area (see Figure 24), 32.4 percent spent $1-20, followed by 29.4 percent who spent $81-100, and another 20.6 percent who spent $21-40. The average spending on entertainment was $59.85, and the median amount of spending on entertainment was $40.

Figure 24: Spending on Entertainment



Among respondents who spent at least one dollar on lodging services, the average amount spent on lodging was $233.60, and the median amount of the spending on lodging was $150. It was the highest expense out of the eight categories. As for the range of spending in this category (see Figure 25), about 47.4 percent spent $101-150, 17.5 percent spent over $251, 15.8 percent spent $51-100, and 15.8% spent $151-200.

Figure 25: Spending on Lodging Services



Among respondents who spent at least one dollar on recreation and attractions (see Figure 26), 48.1 percent spent $1-20, followed by 22.2 percent who spent $41-60, and 14.8 percent who spent $81-100. The average spending on recreation was $41.11, and the median amount of spending on recreation and attractions was $25.

Figure 26: Spending on Recreation

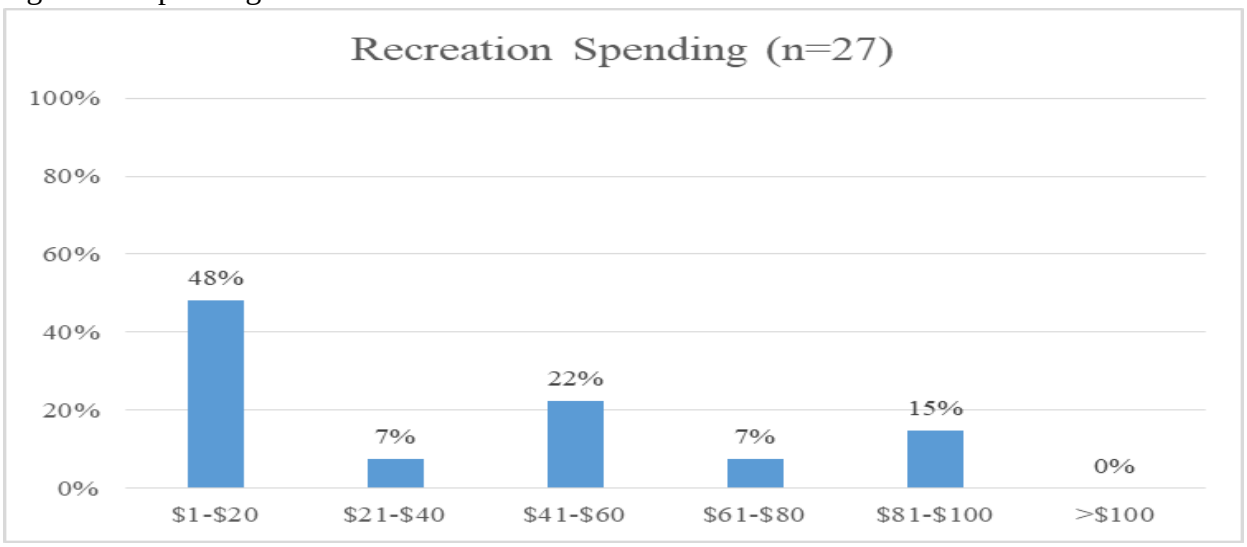
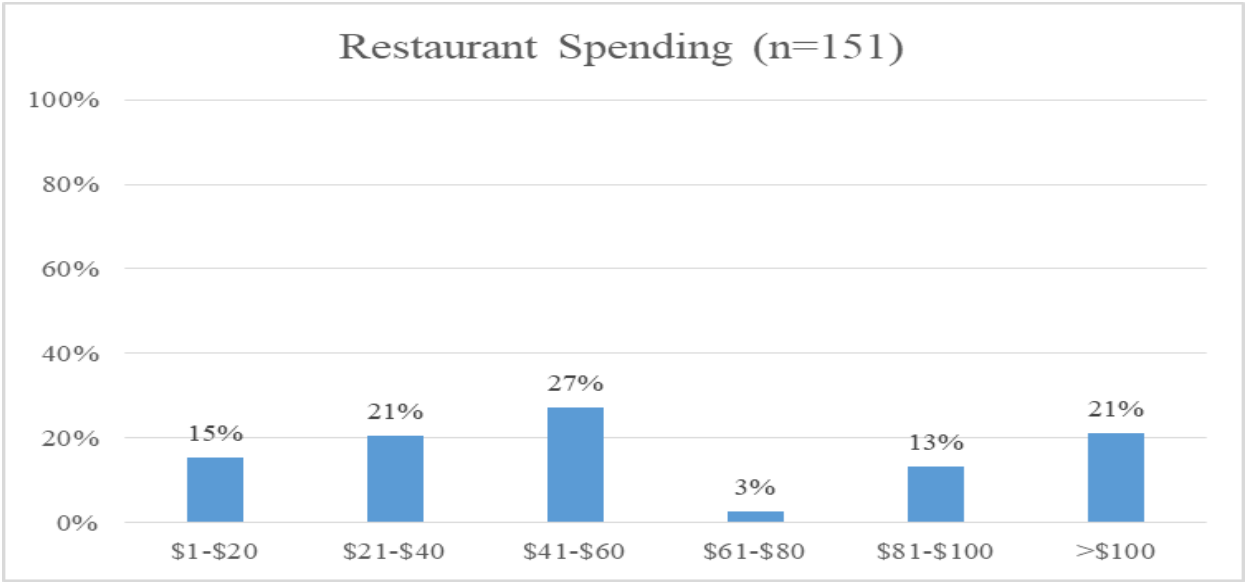


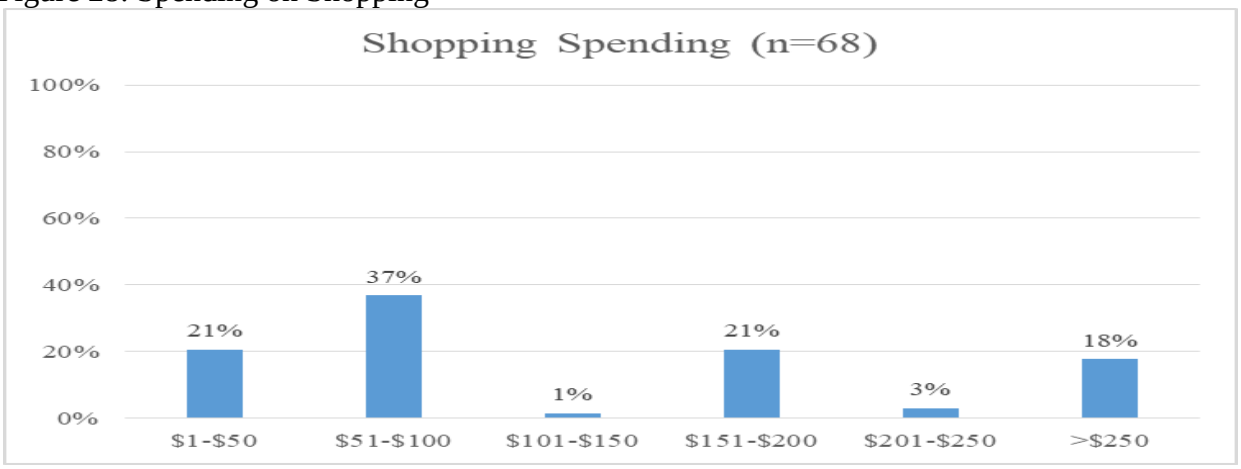
Figure 27 illustrates the spending in restaurants by visitors to the St. Cloud Metro Area. Dining out was one of the most popular activities for the participants in this study. Among respondents who spent at least one dollar at restaurants and bars (see Figure 27), 27.2 percent spent $41-60, 21.2 percent spent over $100, 20.5 percent spent $21-40, about 15 percent spent $1-20, and 13.2 percent spent $81-100. The average amount spent was $89.62, and the median amount of spending at the restaurants was $50.

Figure 27: Spending in Restaurants



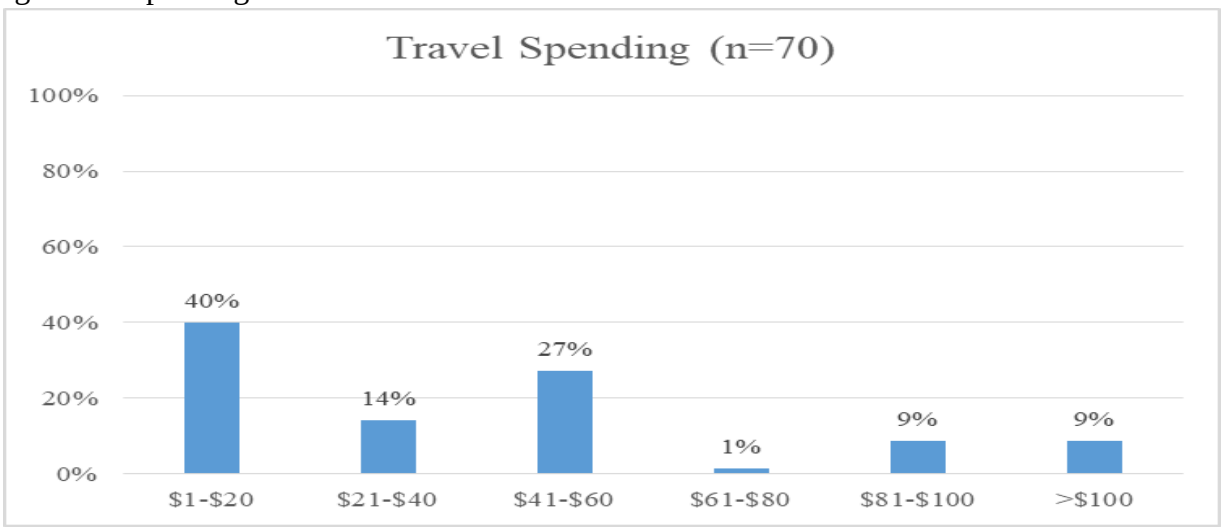
Shopping was the second biggest spending category, not taking into account the 'other' spending category (discussed on p. 54). Visitors who came to the St. Cloud Metro Area spent on average $202.28 on shopping, and the median amount of spending on shopping was $100. Among respondents who spent at least one dollar on shopping (see Figure 28), 36.8 percent spent $51-100, 20.6 percent spent $1-50, 20.6 percent spent $151-200, and 17.6 percent spent over $250.

Figure 28: Spending on Shopping



Information on spending on travel-related purchases is displayed in Figure 29. On average, visitors spent $63.04 on travel, and the median amount of spending on travel-related purchases was $37.50. Among respondents who spent at least one dollar on travel (see Figure 18), 40 percent spent $1-20, 27.1 percent spent $41-60, and 14.3 percent spent $21-40.

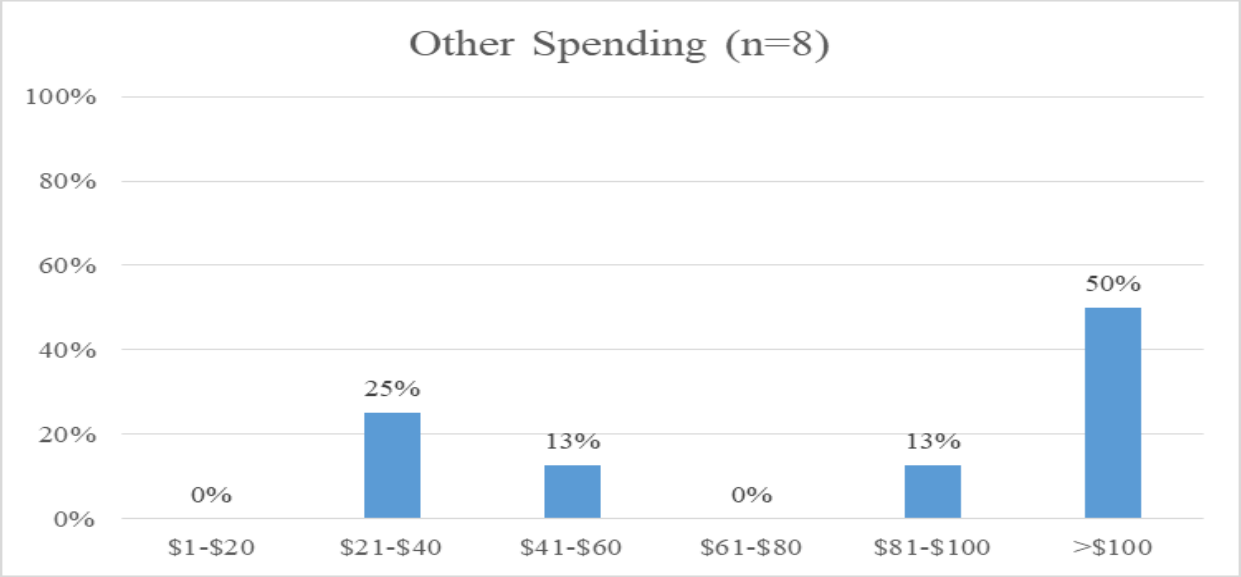
Figure 29: Spending on Travel-Related Purchases



Although the average spending in the 'Other' category was more than $1,200, outlier effects should be considered when interpreting the results. The median amount of spending on other miscellaneous purchases was $200. Among respondents who spent at least one dollar on “other”

expenditures (see Figure 30), 50 percent spent over $100, 25 percent spent $21-40, 12.5 percent spent $41-60, and 12.5% spent $81-100.

Figure 30: Spending on Other Miscellaneous Purchases



RESULTS: ECONOMIC IMPACT ANALYSIS

ECONOMIC IMPACTS

The economic contribution is comprised of direct, indirect, and induced effects. Direct effects are those generated by the event or activity itself. For this analysis, the direct effect is spending by visitors in St. Cloud. Indirect and induced effects are the ripple effects created across the supply chain when direct spending occurs. For example, when visitors stay at a hotel then the hotel needs to purchase electricity, laundry services, and hire workers, for example. This causes those suppliers to increase their expenditures, thereby increasing demand on other local businesses.

An initial step of economic impact analysis is to quantify the direct effects. Direct effects are then entered into an input-output model to estimate the indirect and induced effects. This analysis uses the input-output model IMPLAN with Type SAM multipliers.

Direct Effect

The direct effect of St. Cloud visitors is their total spending. Total spending is calculated by multiplying the total number of visitors by the average spending per visitor. The following section explains how we calculated total spending. The basis of the calculations was the data collected for the visitor profile.

The primary study area for this analysis includes the three counties of the St. Cloud metropolitan statistical area (MSA). They are Benton, Sherburne, and Stearns counties. Parts of the City of St. Cloud are in each county. This area was also selected as the study area as it seems to adequately represent a regional trade area—in other words, where visitors to St. Cloud might stay, dine out, and shop. A study area that reflects the regional trade area is ideal for an economic contribution study, as it fully shows the flow of goods and services.

Number of Visitors

The first step for determining the direct effect of visitors to St. Cloud is to estimate the number of visitors. Estimating visits to a community is challenging since there are no hard counts of people coming to the city. A starting point is the number of people staying in hotel rooms. The data, including the number of rooms available and occupancy rates, are available. From there, data from the survey regarding the ratio of day visitors versus overnight visitors can help estimate total visits.

Table 31: Estimated Number of Overnight St. Cloud Visitors, 2019

Category	Value
Room inventory	1,576
Occupancy (5-year average)	61.8%
Days per year	365
Average visitors per room	2.5
Estimated visitors	888,745

In 2019, there were 1,576 hotel rooms in St. Cloud. Hotels reported an average daily occupancy rate of 61.8 percent during the previous five-year period. Assuming an average of 2.5 visitors per room, this yields a total of 888,745 overnight visitors to St. Cloud per year (Table 31).

To calculate impact by season, one must also have a measure of visits by season. Visit Greater St. Cloud, the local convention and visitors' bureau, provided a summary of hotel lodging tax receipts by season for 2017 to 2019 (Table 32). From this, one can get a sense of visits per season. Of total lodging tax receipts, 28 percent came from summer, the highest season, followed by 27 percent in spring. Using these rates, the highest number of overnight visitors come to St. Cloud in the summer – an estimated 245,569 visitors. Winter had the lowest figure at 188,065.

Day visitors can be calculated based on the ratio of day visits to overnight visits in the survey data. In summer, for example, 34 percent of survey respondents indicated being day visitors. For fall and winter, 55 percent of responders were day visitors. Based on these figures, we estimated the number of day visitors. While the number of overnight visitors was higher in summer and spring, day visits were higher in fall and winter.

Table 32: Estimated Number of St. Cloud Visitors by Season, 2019[1]

Season	Percent of Annual Lodging Tax Receipts	Estimated Number of Overnight Visitors	Estimated Number of Day Visitors
Summer	28%	245,569	154,057
Fall	25%	218,017	266,465
Winter	21%	188,065	239,355
Spring	27%	237,214	194,084
All	100%	888,865	853,961

Visitor Spending (*from the overall view*)

The second step for determining the direct effect of visitors to St. Cloud is to calculate the spending per person. The spending data comes from the survey of St. Cloud visitors.

Table 33: Average Spending Per Person Per Day: St. Cloud Visitors

Category	Fall 2019
Dining Out	$40.15
Shopping	$26.89
Lodging	$24.50
Groceries	$12.41
Transportation	$12.18
Entertainment	$6.82
Other	$4.14
Recreation	$2.97
Total	$130.06

On average, St. Cloud visitors in the fall spent $130.06 per person per day. Major expenditures included dining out, shopping, and lodging (Table 33). These figures include spending average across all respondents, not just those who spent one dollar, as presented earlier in this report.

Spending also varies by the type of visitor – day versus overnight. Those coming to St. Cloud for a day visit, say to take a college-aged child to lunch, spend significantly less than those spending

[1] Values may not sum due to rounding.

the night in the area (Table 34). On average, lodging accounts for about $50 of the difference. Day visitors also report spending less on average on entertainment and dining out.

Table 34: Average Spending Per Person Per Day by Visitor Type: St. Cloud Visitors

Category	Fall 2019
Day visitors	$60.64
Overnight visitors	$174.27
All visitors	$130.06

The direct effect is then the number of estimated visitors times the average spending per visitor. In the fall, this works out to total visitor spending of $54.2 million (Table 35).

Table 35: Direct Impact of St. Cloud Visitors, 2019

Category	Fall
Day Visitors	
Average spending	$60.64
Number of visitors	266,465
Day spending	$16,159,498
Overnight Visitors	
Average spending	$174.30
Number of visitors	218,017
Overnight spending	$37,994,612
Total visitor spending	$54,154,110

Indirect and Induced Effects

Indirect and induced effects are the ripple effects generated as a result of direct spending. Indirect effects are those associated with business-to-business transactions. For example, if a restaurant serving a visitor buys locally grown vegetables, then the growers have to increase purchases from their suppliers, creating an increase in the supply chain. Induced effects are those associated with consumer-to-business transactions. For example, the restaurant pays its employees. The employees then buy groceries, pay rent, and so forth, generating impacts on that supply chain. The IMPLAN model estimates indirect and induced effects based on supply availability in the region.

Total Effects

In fall 2019, visitors to St. Cloud generated an estimated $77.8 million in economic activity in the region (Table 36). This included $20.2 million in labor income. Visitors supported employment for 780 workers in the area during the fall season.

Table 36: Total Economic Contribution of St. Cloud Visitors, Fall 2019

Category	Direct	Indirect	Induced	Total
Output (millions)	$54.2	$12.2	$11.4	$77.8
Employment	590	100	90	780
Labor Income (millions)	$12.6	$3.9	$3.7	$20.2

Overnight visitors drove the most significant share of economic activity (Table 37). Of the $77.8 million total, 72 percent was from overnight visitors.

Table 37: Total Economic Contribution of St. Cloud Visitors, Fall, by Visitor Type, Summary

Category	Day Visitors	Overnight Visitors	Total
Output (millions)	$22.0	$55.8	$77.8
Employment	200	580	780
Labor Income (millions)	$5.1	$15.1	$20.2

TAX EFFECTS

The model can also estimate the effect on tax collections. In fall 2019, visitors to St. Cloud generated an estimated $6.7 million in state and local taxes (Table 38).

Table 38: Total Economic Contribution of Visitors, State and Local Tax Impacts (millions)

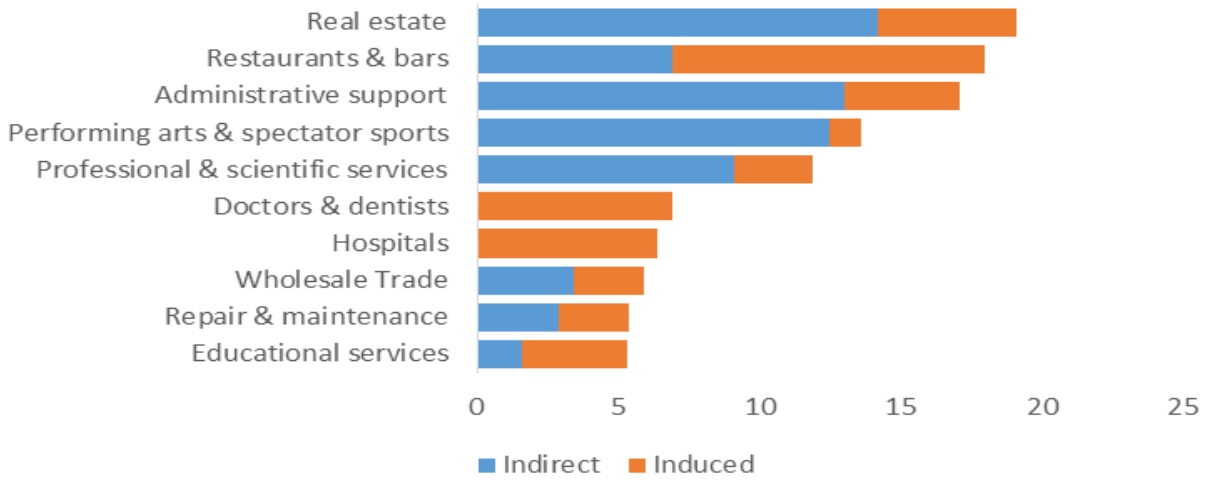
Category	Fall 2019
Sales tax	$3.2
Property tax	$2.2
Income tax	$0.7
Other tax	$0.6
Total	**$6.7**

TOP INDUSTRIES AFFECTED

Other than industries directly serving tourists (such as hotels), industries in the region experiencing the largest benefits from St. Cloud visitors include the real estate market, restaurants and bars, and administrative support (Figure 31). The real estate impact is approximately 70 percent from indirect effects and 30 percent from induced effects. Indirect effects in real estate stem from businesses, like retail stores and restaurants, paying rents and mortgages on their properties. Induced effects in the industry derive from employees of those businesses paying for their own housing.

The activity in the restaurants and bars industry occurs due to the ripple effects from tourism spending. For example, when tourists stay at a hotel, the hotel may provide some food, therefore, generating an indirect effect in the restaurant and bar industry. Likewise, hotel workers may use their paychecks for dining out, thus generating an induced effect.

Figure 31 : Fall Visitors to Saint Cloud, Top Ten Industries Affected, Indirect and Induced Effects Only, Sorted by Employment



SENSITIVITY ANALYSIS

This analysis relies heavily on an estimate of the number of visitors. Sensitivity analysis explores how a change in the estimated number of visitors changes the economic impact. This sensitivity analysis assumes the number of visitors is 25 percent lower than the figures used above. If visitors were 25 percent lower, the total economic impact would be $58.4 million and 590 jobs (Table 39).

Table 39: Total Economic Contribution of St. Cloud Visitors, 25 Percent Fewer Visitors, Fall 2019

Category	Direct	Indirect	Induced	Total
Output (millions)	$40.6	$9.2	$8.6	$58.4
Employment	445	75	70	590
Labor Income (millions)	$9.5	$3.0	$2.8	$15.3

DISCUSSIONS

DEMOGRAPHICS

The findings of the Fall 2019 Visitor Profile suggest that the St. Cloud Metro Area attracts visitors with higher household incomes, similar to our findings in the summertime. Thirty percent of participants had a household income of more than $100,000 while the median U.S. household income was $68,703 (U.S. Census Bureau, 2019). This area also attracted people who were over the age of 50 (50.5%), and the average visitor group size was 1.72 persons, which is smaller than the average group size in the summer. Just over one-third (38.8%) of total participants lived within a 60-mile radius, which likely explains the limited amount spent on accommodation. Word of mouth, Google, and Facebook were the three most common resources to learn more about the St. Cloud Metro Area. The top three reasons to visit the area in the fall were visiting the college campus, going to conventions/conferences, and seeing friends and family, which combined accounted for half (54.0%) of all reasons provided. Unlike in the summer, attending festivals or special events was no longer the main reason to visit the St. Cloud Metro Area, probably due to a lack of festivals/special events at this time owing to the climatic constraints of the fall season. Respondents also indicated that the top three activities were dining out, shopping, and festivals/events.

RELATIONSHIPS BETWEEN PARTICIPANTS AND THEIR PREFERENCES

Male participants tended to be in the younger group while females were more likely to be in the middle-aged and older groups. Although the middle-income group had more males and females than the other income level groups, there were more higher-income females than lower-income females and—conversely—more lower-income males than higher-income males. Reasons for visiting the St. Cloud Metro Area were slightly different for male and female visitors. For female visitors, the top two reasons were business and seeing friends/family whereas for male visitors the top two reasons were business and visiting the college campus. Another interesting finding was that females were more likely than males to go shopping during their trip to the area.

Younger participants stated that the St. Cloud Metro Area was their primary destination while older folks were less likely to do so. This trend could be related to the fact that the younger age group tended to stay in the area for longer than the other two age groups. As for the number of times, participants had visited the St. Cloud Metro Area in the prior twelve months, older age group had visited significantly more times than the other two age groups. Despite staying longer on average, younger visitors tended to spend less during their trip compared to middle-aged and older visitors. With respect to trip activities, older visitors were more engaged in nightlife/evening entertainment and museum/library visits whereas middle-aged visitors were more likely to participate in meetings and visit the college campus.

Most young participants were in the lower-income group, most middle-aged participants were in the higher-income groups, and most older participants were in the middle-income group. Most local residents (residing within a 60-mile radius) visited the St. Cloud Metro Area for the college campus, business, festivals/special events, or to simply pass through on their way to somewhere else. For out-of-state visitors, seeing friends and/or relatives was the most commonly reported reason for visiting, followed by going to the campus. The out-of-state group spent significantly more on lodging, restaurants, and travel compared to local and in-state groups. This group was

also significantly more likely than local and in-state visitors to dine out, sightsee, hike, see family/friends, and visit the college campus. Meanwhile, local visitors were far more likely to attend festivals and special events than the other two residency groups.

Activity participation differed significantly by visitors' income status. Lower-income visitors were more likely to spend more nights in the St. Cloud Metro Area than their middle-income and higher-income counterparts. In terms of stark contrasts, lower-income visitors were more likely to come for health care/medical treatments, middle-income visitors were more likely to engage in 'other outdoor activities,' and higher-income visitors were more likely to visit the college campus.

Compared to the findings in the summer profile, this fall study finds that gender has more of an impact on visitors' behaviors and experiences while income and residency still serve as critical predictors when trying to understand visitors' spending patterns.

RESPONDENTS' LEVELS OF SATISFACTION

More than 80% of participants indicated that they were satisfied with their travel experiences in the St. Cloud Metro Area, and more than 75% of them would like to return in the future and would be willing to recommend the area to other potential visitors.

SPENDING

Male visitors spent significantly more on entertainment than their female counterparts. Out-of-state visitors spent significantly more on lodging, restaurants, and travel than the other two residency groups. Aside from the "Other" spending category (a probable outlier), shopping and restaurants were the two major expenses for visitors, echoed by the fact that dining out was by far the most popular activity.

ECONOMIC IMPACT ANALYSIS

The primary study area for this analysis includes the three counties of the St. Cloud metropolitan statistical area (MSA). They are Benton, Sherburne, and Stearns counties. Parts of the City of St. Cloud are in each county. This area was also selected as the study area as it seems to adequately represent a regional trade area—in other words, where visitors to St. Cloud might stay, dine out, and shop. A study area that reflects the regional trade area is ideal for an economic contribution study, as it fully shows the flow of goods and services.

Two steps were utilized to calculate the direct economic impacts in this study including 1) estimating the number of visitors and 2) calculating the spending per person. The number of overnight visitors comes to St. Cloud in the summer – an estimated 218,017 visitors.

In 2019, there were 1,576 hotel rooms in St. Cloud. Hotels reported an average daily occupancy rate of 61.8 percent during the previous five-year period. Assuming an average of 2.5 visitors per room, this yields a total of 888,745 overnight visitors to St. Cloud per year. On average, St. Cloud visitors in the fall spent $130.06 per person per day. Major expenditures included dining out, shopping, and lodging.

In fall 2019, visitors to St. Cloud generated an estimated $77.8 million in economic activity in the region. This included $20.2 million in labor income. Visitors supported employment for 780 workers in the area during the fall season. Overnight visitors drove the most significant share of economic activity. Of the $77.8 million total, 72 percent was from overnight visitors.
In fall 2019, visitors to St. Cloud generated an estimated $6.7 million in state and local taxes.

APPENDIX A

The St. Cloud Metro area Visitor Study Survey

By St. Cloud City Hall, St. Cloud CVB, & St. Cloud State University

Pre-survey screening questions:

Is your primary residence at the St. Cloud Metro area (including St. Cloud, Sauk Rapids, Sartell, Waite Park, and St. Joseph) ____ Yes (please stop) ____ No (Continue)

Are you 18 years old or older? ___ Yes (Continue) ____ No (please stop)

Section 1: About your trip:

About your trip to the St. Cloud Metro area (including the following areas: St. Cloud, Sauk Rapids, Sartell, Waite Park, and St. Joseph):

1. Is the St. Cloud Metro area your primary destination for this trip? ____ Yes ____ No, the final destination is _____.
2. What is the **primary** or the **most important** reason that you made this trip to the St. Cloud Metro area? **(Check ONLY 1)**

   ____ Art, music, or theater ____ Business/Work ____ Campus visit
   ____ Convention/Conference ____ Festival/event ____ Food & Drink
   ____ Historic sites/Museum ____ Health care ____ Outdoor recreation
   ____ Passing through ____ Shopping ____ Sports events
   ____ Visit Family/Friends ____ Wedding
   ____ Other Please specify if possible:_____
3. How many times have you visited the St. Cloud Metro area in the past 12 months?
   _____ times.
4. How many people, including yourself, are in your group? **(Please specify the number in each age category)**

   ___ 0-12 Years; ___ 13-17 Years; ___ 18-25 Years; ___ 26-40 Years; ___ 41-59 Years; ___ 60+ Years
5. While on this trip, which of the following activities have members of your travel party participated in or will participate in? **(Check all that apply)**

   General
   ___ Dining out
   ___ Health care/medical treatment
   ___ Nightlife/evening entertainment
   ___ Shopping
   ___ Sightseeing
   ___ Meeting

   Participating in
   ___ Biking
   ___ Fishing
   ___ Hiking
   ___ Kayaking/Canoeing
   ___ Skateboard/BMX
   ___ Other outdoor activities

   Visiting
   ___ Brewery/Winery
   ___ Friends/relatives
   ___ College campus
   ___ Museum/Library
   ___ Parks

   Attending
   ___ Festivals/Events
   ___ Homecoming/Class reunion
   ___ Sporting events
   ___ Shows/Music Concerts
   ___ Wedding/Family reunion

6. How many nights will be in the St. Cloud Metro area? ____ Nights (if 0, go to Question 8).
7. If you are staying in the St. Cloud Metro area, how many nights are you staying in EACH the following types of accommodations?
   ___ Hotel/motel ___ Private housing via VRBO/Air B&B ___ Friend's or relative's home
   ___ Bed & Breakfast ___ Campground ___ Other (_____)
8. Please estimate your travel group's (or your, if you are travelling alone) spending in the St. Cloud Metro area on average per day of your stay:

$_____ Groceries	$_____ Entertainment	$_____ Lodging
$_____ Recreation/Attractions	$_____ Restaurants/Bars	$_____ Shopping
$___Transportation (including gas)	$_____Other (explain): _____	

9. What information sources did you use to plan this trip? **(Check all that apply)**

__ www.visitstcloud.com	__ St. Cloud visitor guide	__ area/destination newsletter
__ Magazine advertisement	__ ExploreMinnesota.com	__ Travel Information Center
__ Newspaper	__ Travel agent	__ Blogger/Travel YouTuber
__ Word of mouth	__ Radio	__ TV
__ Facebook	__ Twitter	__ Google
__ Instagram	__ Pinterest	__ Tripadvisor.com
__ Expedia	__ Yelp	

   __ Other (explain):
10. How likely will you visit the St. Cloud Metro area again in the near future? _____
    (Please rate your likelihood level from **5 <mostly likely>** to **1 <least likely>**)
11. Would you recommend a trip to the St. Cloud Metro area to family and friends? _____
    (Please rate your willingness level from **5 <strongly willing>** to **1 <strongly unwilling>**).
12. What is your overall satisfaction with your visit to the St. Cloud Metro area? __ (Please rate your satisfaction level from **5 <extremely satisfaction>** to **1<extremely dissatisfaction>**).
13. Any comments or suggestions about your trip to the St. Cloud Metro area.

    _____

Section 2: Information about yourself:

1. Your gender: Male ____
   Female ____
   Other ____
2. Year of birth: _____.
3. What is the zip code of your primary residence? _____
4. What is your annual total household income (before taxes)?
   ___ Less than $20,000 ___ $20,000-$34,999 ___ $35,000-$49,999 ___ $50,000-$74,999
   ___ $75,000-$100,000 ___ Over $ 100,000

If you like to join in the drawing game for this project, please leave your contact information in the lottery sign-up sheet. Five winners will be randomly picked up by St. Cloud CVB. Please contact St. Cloud CVB, info@visitstcloud.com, if you have any questions regarding the lottery issue.

Please visit our website, www.visitstcloud.com, if you like to learn more about the St. Cloud Metro area.

APPENDIX B

Visitor Survey Respondent Suggestions

- ✓ More entertainment not about drink/burgers
- ✓ Keep it going
- ✓ Enjoyed free parking, friendly workers at airport. "Minnesota Nice". Some areas of st cloud seem to be deteriorating, spent most time in sartell and st jogn's this visit
- ✓ We like st cloud
- ✓ Free parking is a big plus at st cloud airport
- ✓ The TSA agents and airport agents were very nice
- ✓ All is good
- ✓ Enjoy shopping here
- ✓ Great airport
- ✓ traffic, but it's inevitable
- ✓ Love the walkability!
- ✓ very nice city
- ✓ We enjoy visiting and shopping in St. Cloud.
- ✓ effective vehicle charging!!!
- ✓ I'm only here for the conference.
- ✓ events traveled to attend had been cancelled! Found out when we arrived.

- ✓ St. Cloud is a great shopping resource and event area.
- ✓ keep it pretty
- ✓ Bars are fun!
- ✓ Love the free parking andn airport operations
- ✓ St. Cloud airport offers a convinient place to catch a flight to Phoenix
- ✓ Not as safe as it used to be
- ✓ Love coming to the weekly concerts
- ✓ It is amazing
- ✓ Pretty here with nice variety diversity
- ✓ Great music
- ✓ It was a fun girls weekend get-away a log with hotel with swimming pool & sauna to relax after walking every day for activities as listed in survey.
- ✓ Love St. Cloud
- ✓ "Surprisingly outdated lodging at the convention center given the popularity of the location. Also, had difficulty finding food options in early morning before 7am, and later after 9pm.
- ✓ On SCSU campus bus driver had a very hard time dropping people off near the building. Limited parking options for a bus compared to comparable schools."
- ✓ Had a nice stay while in st cloud area.

- ✓ The Goercki House is truly a Godsend.

- ✓ I appreciate all of the kind hospitable people.

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