

St. Cloud State University

theRepository at St. Cloud State

St. Cloud Metro Area Visitor Profile Study

School of Public Affairs Research Institute

4-1-2021

St. Cloud Metro Area Visitor Profile & Economic Impact Final Report Summer 2019-Winter 2020

Kristy Modrow

Brigid Tuck

Pengyu Qian

HungChih Yu

Andrea Haataja

Follow this and additional works at: https://repository.stcloudstate.edu/sopari_scmavp



Part of the [Leisure Studies Commons](#), [Regional Economics Commons](#), [Tourism and Travel Commons](#),
and the [Urban Studies and Planning Commons](#)



SCHOOL OF
PUBLIC AFFAIRS
ST. CLOUD STATE UNIVERSITY.



UNIVERSITY OF MINNESOTA
EXTENSION
Driven to DiscoverSM

St. Cloud Metro Area Visitor Profile Report

Final Report

April 1, 2021

Table of Contents

EXECUTIVE SUMMARY	7
PROJECT DETAILS	7
RESPONDENT DEMOGRAPHICS	7
RESULTS	7
ECONOMIC IMPACT	8
DISCUSSION.....	8
RECOMMENDATIONS	9
INTRODUCTION.....	10
METHODOLOGY	11
STUDY SETTING	11
SAMPLING METHOD	11
QUESTIONNAIRE	11
DATA COLLECTION	12
ANALYSIS	13
RESPONDENT DEMOGRAPHICS	13
ST. CLOUD METRO AREA TRIP ACTIVITIES, PURPOSE, AND PLANNING	13
RESIDENCY PREDICTOR FOR RESPONDENTS' TRIP DECISIONS	13
ECONOMIC ANALYSIS.....	14
RESULTS	15
RESPONDENT DEMOGRAPHICS	15
Gender and Age	15
Residency	16
Household Income	18
Visit Frequency.....	18
RESPONDENT TRIP DETAILS	20
Primary Destination: St. Cloud Metro Area	20
Reasons for Visiting the St. Cloud Metro Area	20
Average Stay & Accommodation Usage	22
Visitor Spending	23
Visitor Information Sources	23
Visitor Satisfaction	24
RESIDENCY AS THE PREDICTOR FOR RESPONDENT'S TRAVEL BEHAVIORS AND DECISIONS	26

Residency and Primary Trip Decision.....	26
Residency and Visiting Reasons	27
Residency and Activity	29
Residency and age, spending, and number of nights	32
Residency and Information Sources	35
Residency and Satisfaction	37
Residency and Average Trip Spending	38
ST. CLOUD VISITOR ECONOMIC IMPACT	39
Direct Effect	39
Number of Visitors	40
Visitor Spending	41
Indirect and Induced Effects	42
Total Effects	42
Tax Effects	44
Top Industries Affected.....	44
Tourism in the Context of St. Cloud’s Economy.....	45
Economic Impact of Visitors at RECC and MAC in St. Cloud	45
DISCUSSION.....	49
RESPONDENT DEMOGRAPHICS	49
RESIDENCY AND RESPONDENTS’ TRAVELING BEHAVIORS	49
ECONOMIC IMPACT	50
RECOMMENDATIONS	52
APPENDIX A.....	54
REFERENCES.....	56

List of Figures

Figure 1: Respondent Gender	15
Figure 2: Respondent Age Group Distribution.....	15
Figure 3: Respondent Residency Distribution.....	16
Figure 4: Respondent Residency Map (Minnesota).....	17
Figure 5: Respondent Residency Map (United States)	17
Figure 6: Respondent Income Distribution	18
Figure 7: Respondent Number of Visits in the Past 12 Months.....	19
Figure 8: Respondent St. Cloud Metro Area Primary Trip Destination.....	20
Figure 9: Respondent Reasons to Visit the St. Cloud Metro Area (seasons combined)	20
Figure 10: Respondent Reasons to Visit the St. Cloud Metro Area by Season	21
Figure 11: Respondent Accommodation Usage Distribution by Season	22
Figure 12: Respondent Number of Nights Spent in the St. Cloud Metro Area	22
Figure 13: Respondent Average Trip Spending by Season	23
Figure 14: Information Sources Used by St. Cloud Metro Area Visitors.....	24
Figure 15: Respondent Satisfaction Level	25
Figure 16: Respondent Likelihood to Revisit the St. Cloud Metro Area	25
Figure 17: Respondent Likelihood to Recommend the St. Cloud Metro Area.....	26
Figure 18: Comparisons of Primary Destination Choices by Residency.....	27
Figure 19: Residency and Reasons to Visit the St. Cloud Metro Area	28
Figure 20: Residency and St. Cloud Metro Area Activity Participation.....	30
Figure 21: Top five most frequently used information sources by St. Cloud Metro Area Visitor Respondents	35
Figure 22: Comparisons of Respondents' Revisit, Recommendation, and Satisfaction levels by Residency Group	38
Figure 23: Average Trip Spending Per Residency Group	39
Figure 24: Visitors to St. Cloud, Top Ten Industries Affected, Indirect and Induced Effects Only, Sorted by Employment.....	45

List of Tables

Table 1: Respondent Primary Residence	16
Table 2: Comparisons of Primary Destination Choices by Residency.....	27
Table 3: Comparisons of Visiting Reasons by Residency	28
Table 4: Comparisons of Activities by Residency.....	31
Table 5: Comparisons of Respondents' Ages, Trip Details, and Expenditures by Residency Group	32
Table 6: Comparisons of Information Sources by Residency.....	36
Table 7: Comparisons of Respondents' Revisit, Recommendation, and Satisfaction levels by Residency Group	38
Table 8: Estimated Number of St. Cloud Visitors, 2019.....	40
Table 9: Estimated Number of St. Cloud Visitors by Season, 2019.....	40
Table 10: Average Spending per Person per Day by Season: St. Cloud Visitors	41
Table 11: Average Spending per Person per Day by Visitor Type: St. Cloud Visitors	41
Table 12: Direct Impact of St. Cloud Visitors, 2019	42
Table 13: Total Economic Contribution of St. Cloud Visitors, Summer 2019	42
Table 14: Total Economic Contribution of St. Cloud Visitors, Fall 2019	43
Table 15: Total Economic Contribution of St. Cloud Visitors, Winter 2019.....	43
Table 16: Total Economic Contribution of St. Cloud Visitors, Spring 2019.....	43
Table 17: Total Economic Contribution of St. Cloud Visitors, 2019 Summary.....	43
Table 18: Total Economic Contribution of Visitors by Visitor Type, Summary	44
Table 19: Total Economic Contribution of Visitors, State and Local Tax Impacts (millions).....	44
Table 20: Tourism Related Employment in Context of Industry, All Seasons.....	45
Table 21: Average Spending per Person per Day by Season: St. Cloud Visitors	46
Table 22: Direct Impact of St. Cloud Visitors, River's Edge Convention Center, 2019.....	46
Table 23: Total Economic Contribution of St. Cloud Visitors, River's Edge Convention Center 2019	46
Table 24: Average Spending per Person per Day by Season: St. Cloud Visitors	47
Table 25: Direct Impact of St. Cloud Visitors, Municipal Athletic Complex, 2019	48
Table 26: Total Economic Contribution of St. Cloud Visitors, Municipal Athletic Complex, 2019.....	48

St. Cloud Visitor Profile, Final Report

April 1, 2021

Authors: Kristy Modrow; Brigid Tuck, Pengyu Qian; Hung-Chih Yu; Andrea Haataja
St. Cloud State University Department of Geography & Planning
University of Minnesota Extension Center for Community Vitality

This report is 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.

St. Cloud State University does not discriminate based on race, sex, color, creed, religion, age, national origin, disability, marital status, status with regards to public assistance, sexual orientation, gender identity, gender expression, or status as a U.S. veteran. For additional information, contact the Office for Institutional Equity & Access, (320) 308-5123, Admin. Services Bldg. Rm 121.

EXECUTIVE SUMMARY

PROJECT DETAILS

In 2019, the St. Cloud City Hall, St. Cloud Area Convention and Visitor Bureau, and Retired and Senior Volunteer Program (RSVP) contracted with St. Cloud State University School of Public Affairs, Geography & Planning Department, and the Hospitality and Tourism Program to conduct a visitor profile survey from summer 2019 to spring 2020. Three reports were issued to summarize seasonal findings. Spring 2020 area events and airport travel were suspended due to COVID-19, thus concluding the study. Therefore, the fourth seasonal report could not be issued. This final report is a summation of summer season 2019, fall season 2019, and winter season 2020.

RESPONDENT DEMOGRAPHICS

A total of 1,509 valid and completed copies of questionnaires (including 984 copies from summer, 293 copies from fall, and 232 copies from winter), onsite and online, were retrieved for this data analysis. The data suggests that the St. Cloud Metro Area attracts visitors aged 50 or older with higher household incomes. Due to sampling issues, it could not definitively be concluded that the St. Cloud Metro Area receives more female than male visitors even though there were more female respondents to the survey. About 30% of respondents had a household income of more than \$100,000 while the median U.S. household income was \$68,703 (U.S. Census Bureau, 2019). The most represented age group was Baby Boomers (born 1946-1964), which accounted for 45% of visitors surveyed. Most participants lived within a 60-mile radius (42.03% in total).

RESULTS

13% of visitors were visiting the area for the first time and the majority of the respondents had visited the St. Cloud Metro Area six or more times in the past 12 months (35.55%).

Respondents reported word of mouth (26.72%), Google (13.27%), and Facebook (12.90%) as their top three sources for obtaining destination information.

Almost 77% of participants listed the St. Cloud Metro Area as their primary trip destination. Over a third of the respondents (35.55%) report that they visited the St. Cloud Metro Area six or more times within the past 12 months and 47% of respondents did not use accommodations. It could be implied that most participants visit the area often and are not in need of accommodation as they live close to the St. Cloud Metro Area.

The top three reasons for visiting the St. Cloud Metro Area were campus visit (18.57%), visiting family and friends (16.36%), and attending art, music, or theatre events (12.48%). These three most common reasons for visiting the area accounted for almost half of the responses in total (47.41%). Respondents also indicated that the top three activities they participated in were dining out (20.03%), shopping (12.76%), and attending festivals or events (9.97%).

While visiting the St. Cloud Metro Area, respondents reported spending the most money on lodging for summer 2019 and winter 2020. For fall 2019, other was noted as the highest area of spending. \$259 was the average amount spent on accommodations. Respondents spent an average of \$160 on shopping.

More than 65% of survey participants indicated that they were satisfied with their travel experience in the St. Cloud Metro Area, and more than 75% of them are likely to revisit the St. Cloud Metro Area. 66% of the total survey participants said they would strongly recommend the St. Cloud Metro Area to other potential visitors in the future.

ECONOMIC IMPACT

In 2019, St. Cloud visitors generated an estimated \$317.9 million in economic activity. Visitors supported 3,125 jobs that paid \$81.5 million in labor income. 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.

There were an estimated 1.7 million visitors to St. Cloud in 2019. Of these, slightly more than half (51 percent) were overnight visitors. On average, summer visitors spent \$142.17, fall visitors \$130.06, winter visitors \$111.95, and spring visitors \$136.48 per person per day. On average, overnight visitors spent about \$100 per person per day more than day visitors. Lodging accounted for about half that difference, along with lower spending on food and entertainment.

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.

DISCUSSION

Most respondents were 50 years and older and females were more likely to take the survey than males. More local respondents (within a 60-mile radius of the St. Cloud Metro Area) participated in this study due to the proximity to the St. Cloud Metro Area. Most respondents were repeated visitors and the St. Cloud Metro Area was their primary trip destination. Most of them learned about the St. Cloud Metro Area from word of mouth and Google. Most respondents were satisfied with their experience in St. Cloud Metro Area. They would most likely revisit and recommend the area to others.

Findings showed that dining-out was the most popular activity among respondents. The COVID-19 pandemic caused devastating impacts on local hospitality and tourism businesses. Events and conventions were canceled, hotel reservations ceased, and local restaurants were closed.

Respondents' residency is the most powerful predictor for profiling visitors to the St. Cloud Metro Area. Out-of-state and in-state respondents tend to spend more and stay longer in the St. Cloud Metro Area. Respondents' residencies also determine their willingness to revisit the area.

In 2019, St. Cloud visitors generated an estimated \$317.9 million in economic activity. Visitors supported 3,125 jobs that paid \$81.5 million in labor income. The findings indicated hospitality and tourism serve as a vital driver for local economic development.

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. 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, and property rent and mortgages. Induced effects in the industry derive from employees of those businesses paying for their own housing.

RECOMMENDATIONS

We made the following recommendations based on the results:

1. Brand the St. Cloud Metro Area.
2. Market St. Cloud as a hub for events and sports tournaments.
3. Partner with airlines & St. Cloud Regional Airport Advisory Board to increase accessibility to the St. Cloud Metro Area.
4. Collaborate with the City of St. Cloud Public Works Street Division and City of St. Cloud Planning and Zoning to improve road conditions and accessibility.
5. Promote the St. Cloud Metro Area as a food tourism hub.
6. Promote the St. Cloud Metro Area as a destination for medical treatment.
7. Conduct further research to determine trends over time.

INTRODUCTION

The purpose of this project was to understand better visitor's travel experiences in the St. Cloud Metro Area and to profile visitors based on their characteristics. Visitor profiling has made significant contributions to destination marketing campaigns over the past several decades when destination marketing managers try to strategically market programs for their potential visitors. Various studies have highlighted the importance of visitor profiling for destination marketing campaigns (e.g., Perera, Vlosky, & Wahala, 2012). By 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 behaviors, such as their touring activities and perceptions on the St. Cloud Metro Area, as well as the purposes of their visits.

This 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 Central Minnesota. 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.

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 (see Appendix A) 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 analysis, we published our findings for each season in a report. These seasonal reports provided local tourism promoting institutions a chance to examine the seasonal variation of visitors to the St. Cloud Metro Area. This final report highlights key findings and recommendations offering insights into current local visitors' touring and spending patterns and makes 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 June 2019 to February 2020.

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.

Notices regarding the online survey were posted at local hotels, the St. Cloud Travel Information Center, and other attractions in the area. Those attending events that were too busy to complete the onsite questionnaires were provided with the online questionnaire link.

SAMPLING METHOD

The onsite survey utilized a convenience sampling approach at various attractions, including major accommodation service locations, St. Cloud Regional Airport, River's Edge Convention Center, St. Cloud State University, and Municipal Athletic Complex. Additional sampling was planned in spring 2020; however, area events and airport travel were suspended due to COVID-19.

QUESTIONNAIRE

A questionnaire in both onsite and online formats was based on the Itasca Area Visitor Profile (University of Minnesota, 2016) and was reviewed by a group of subject matter experts who deemed it to have good face validity was administered to collect data from respondents. 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).

A total of 1,509 valid and completed copies of questionnaires, onsite and online, were retrieved from June 2019 to February 2020. (summer season 2019: 984 completed June to August 2019; fall season 2019: 293 completed from September to November 2019; and winter season 2020: 232 completed from December 2019 to February 2020).

It can be implied that those who chose not to participate may reside within the region, thus were not qualified for the study or were too busy to complete the questionnaire.

The questionnaire data was entered and analyzed by utilizing SPSS (version 23), a statistical analysis software package. Also, Microsoft Excel 2016 was used to create graphs and charts. The data analysis 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.

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

RESPONDENT DEMOGRAPHICS

The majority of respondents were female (62.33%), Baby Boomers (born from 1946-1964; 41.31%), had a household income of \$100,000+ (30.59%) and resided within 60 miles of the St. Cloud Metro Area (42.03%). More than 10 percent of respondents lived in Stearns County, 9.2 percent in Hennepin County, and 5.5 percent in Sherburne County. 13.44% of visitors were visiting the area for the first time and the majority of the respondents had visited the St. Cloud Metro Area six or more times in the past 12 months (35.55%).

ST. CLOUD METRO AREA TRIP ACTIVITIES, PURPOSE, AND PLANNING

Almost 77% of participants listed the St. Cloud Metro Area as their primary trip destination. Over a third of the respondents (35.55%) report that they visited the St. Cloud Metro Area six or more times within the past 12 months.

The top three reasons for visiting the St. Cloud Metro Area were campus visit (18.57%), visiting family and friends (16.36%), and attending art, music, or theatre events (12.48%). These three most common reasons for visiting the area accounted for almost half of the total responses (47.41%). Respondents also indicated that the top three activities they participated in were dining out (20.03%), shopping (12.76%), and attending festivals or events (9.97%).

47% of respondents did not use accommodations. It could be implied that most participants visit the area often and are not in need of accommodation as they live close to the St. Cloud Metro Area.

While visiting the St. Cloud Metro Area, respondents reported spending the most money on Lodging for summer 2019 and winter 2020. For fall 2019, other was noted as the highest area of spending (see figure 13). \$259 was the average amount spent on accommodations. Respondents spent an average of \$160 on shopping.

Respondents reported word of mouth (26.72%), Google (13.27%), and Facebook (12.90%) as their top three sources for obtaining destination information.

More than 65 % of participants indicated that they were satisfied with their travel experience in the St. Cloud Metro Area, and more than 75% of them are likely to revisit the St. Cloud Metro Area. 66% of the total participants said they would strongly recommend the St. Cloud Metro Area to other potential visitors in the future.

RESIDENCY PREDICTOR FOR RESPONDENTS' TRIP DECISIONS

Respondent's residency status, local, in-state, and out-of-state, became the most significant factor in this study for predicting respondents' traveling behaviors, including their reasons for visiting, frequency of visits, group size, length of stay, and spending habits.

Reasons for visiting differed significantly by respondents' residency. Passing through was the major reason for visiting for local and in-state visitors, whereas out-of-state visitors were more likely to visit the St. Cloud Metro Area for family events. Out-of-state visitors were more likely to have fewer previous visits, travel in larger groups, stay longer, and spend more in various categories (total, groceries, entertainment, lodge, restaurant, and travel) than the other two residency groups.

In terms of the different activities participated in by the different residency status groups, there were some discernible differences. Out-of-state visitors tended to dine out, go fishing, visit the brewery/winery, visit friends/relatives, participate in sporting events, and attend show/music concerts, whereas more in-state respondents were likely to receive medical treatments during their trip to the area.

Residency differed significantly by gender. More female respondents lived within Minnesota than males, whereas more male respondents were out-of-state visitors than females. Household income levels also varied significantly by gender. Female respondents tended to be in the middle- and lower-income groups, whereas male respondents were more likely to have a household income of more than \$100,000. Reasons for visiting differed by gender as well. Although passing through was a common prominent reason for visiting this area, male respondents visited the St. Cloud Metro Area due to the sports events, whereas females visited the St. Cloud Metro Area for business purposes.

As for spending, male respondents tended to spend more on entertainment than females. In general, gender would not play a role effectively in predicting visitors' preferences and their behaviors, including residency, income, spending in different aspects, accommodation options, activity participation, and information sources.

ECONOMIC ANALYSIS

Estimating and evaluating the economic impacts of tourism development on the St. Cloud Metro Area served as the second purpose of study for this project. With help from the University of Minnesota, 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. The estimated economic impact of the spring season was reported due to the constraint of surveying during the COVID 19 pandemic period.

RESULTS

RESPONDENT DEMOGRAPHICS

Gender and Age

A total of 1,509 surveys were completed. Approximately 62.33% percent of the respondents were female (figure 1). The majority of participants (figure 2) were Baby Boomers-born 1946-1964 (44.73%). Most participants were 50 years and older, which accounted for more than 50% of the total survey respondents (51.75%).

Figure 1: Respondent Gender

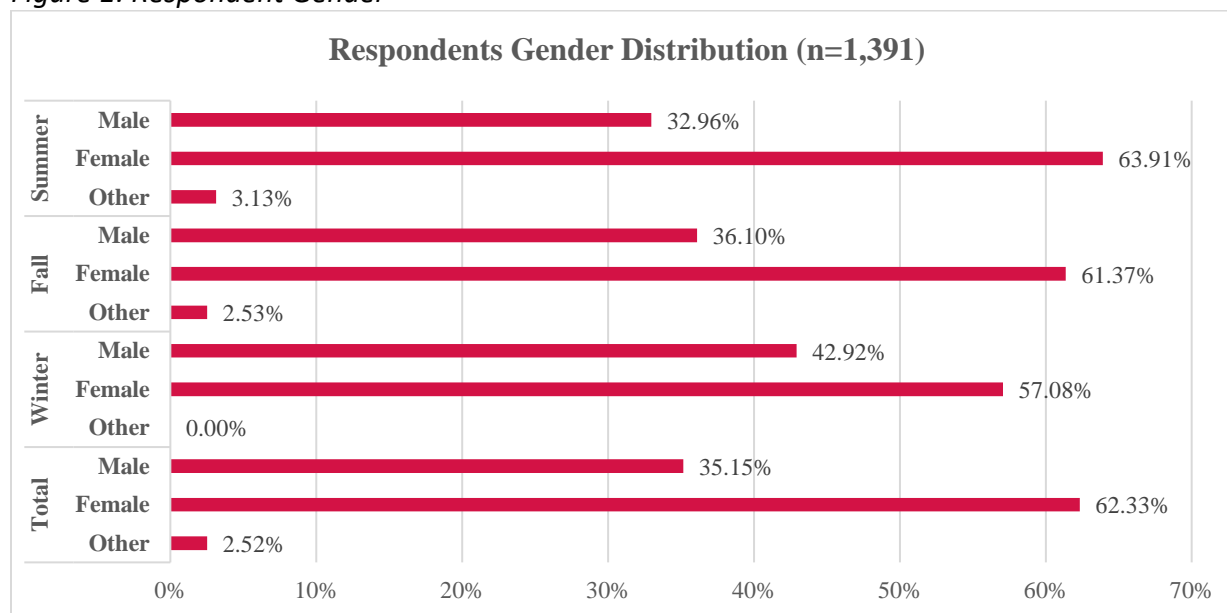
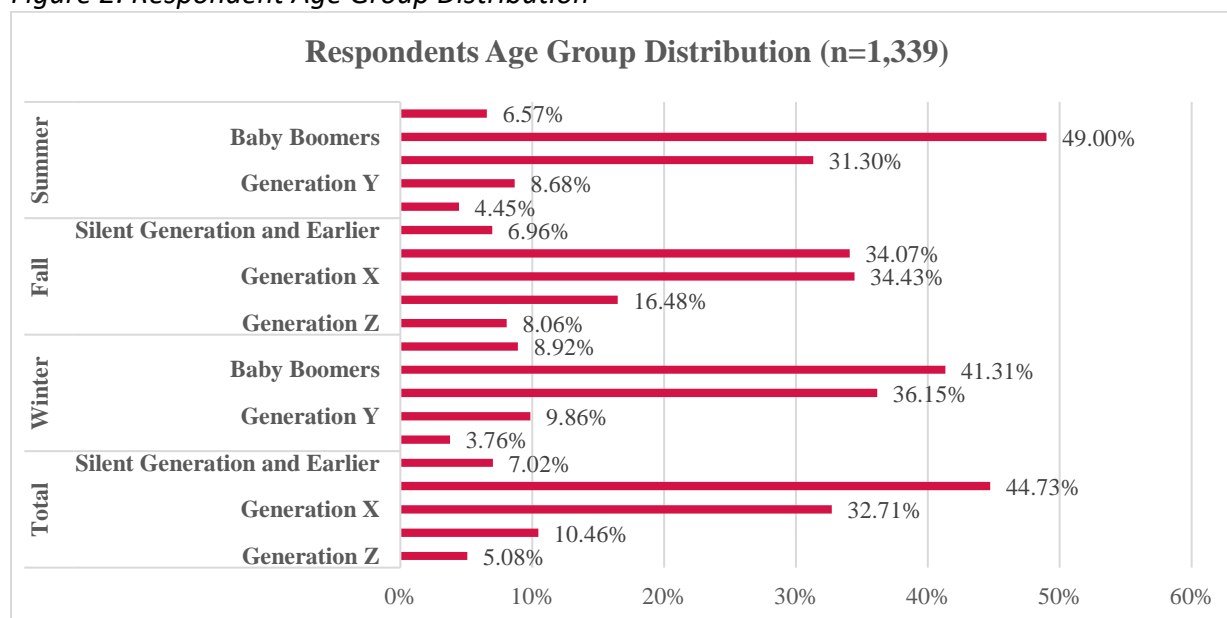


Figure 2: Respondent Age Group Distribution



Residency

The majority of respondents (42.03%) reside within a 60-mile radius of the St. Cloud Metro Area, followed by 34.48% residing outside of a 60-mile radius but within Minnesota (in-state), and 23.49% of participants from out of Minnesota (figures 3, 4, and 5).

Across the three seasons, more than 77 percent of respondents were Minnesota residents and 8.4 percent lived in Arizona. More than 10 percent of respondents lived in Stearns County, 9.2 percent in Hennepin County, and 5.5 percent in Sherburne County (table 1).

Figure 3: Respondent Residency Distribution

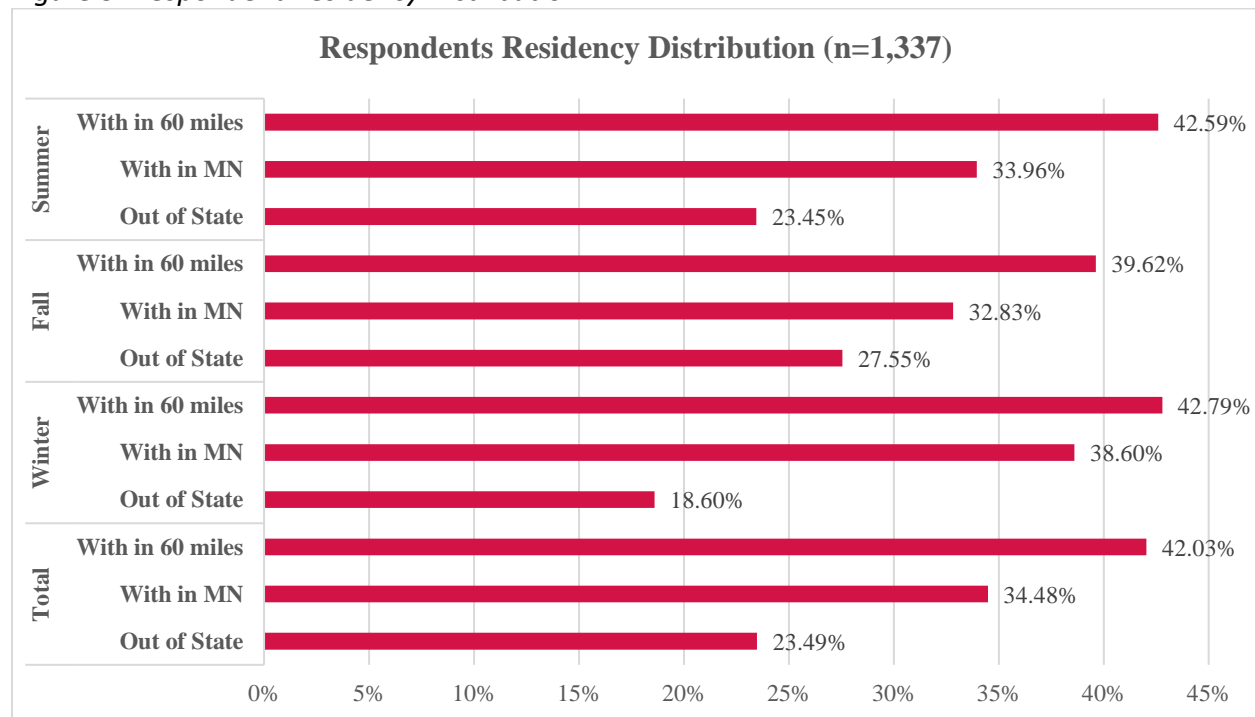


Table 1: Respondent Primary Residence (n=1,314)

Top 10 States	Count	Percent	Top 10 Counties	Count	Percent
Minnesota	1015	77.2	Stearns, MN	135	10.3
Arizona	110	8.4	Hennepin, MN	121	9.2
Wisconsin	59	4.5	Sherburne, MN	72	5.5
Florida	17	1.3	Maricopa, AZ	67	5.1
South Dakota	13	1	Wright, MN	63	4.8
North Dakota	13	1	Morrison, MN	59	4.5
California	9	0.7	Anoka, MN	49	3.7
Iowa	6	0.5	Douglas, MN	44	3.3
Colorado	6	0.5	Ramsey, MN	41	3.1
Texas	6	0.5	Benton, MN	39	3

Figure 4: Respondent Residency Map (Minnesota)

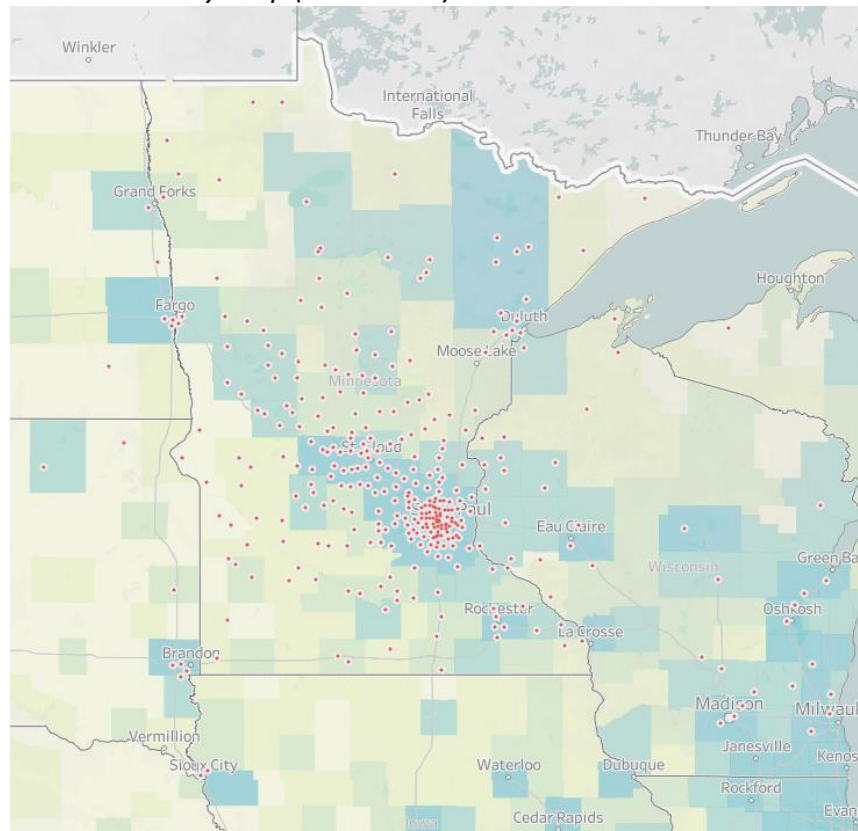
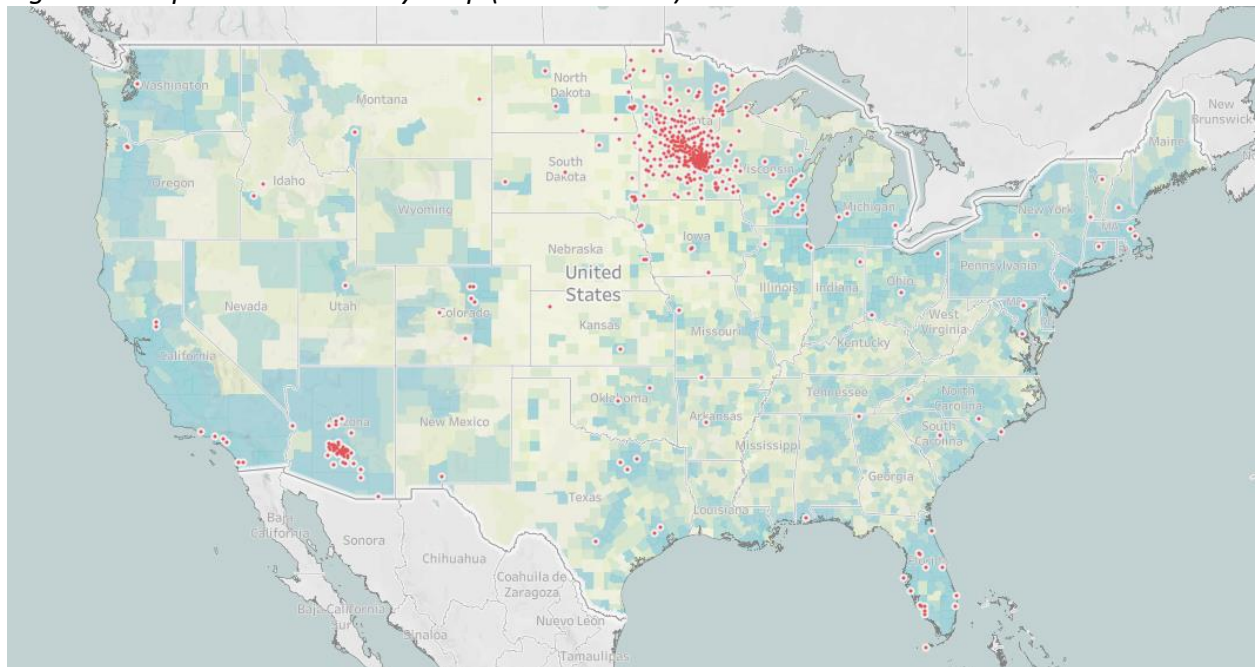


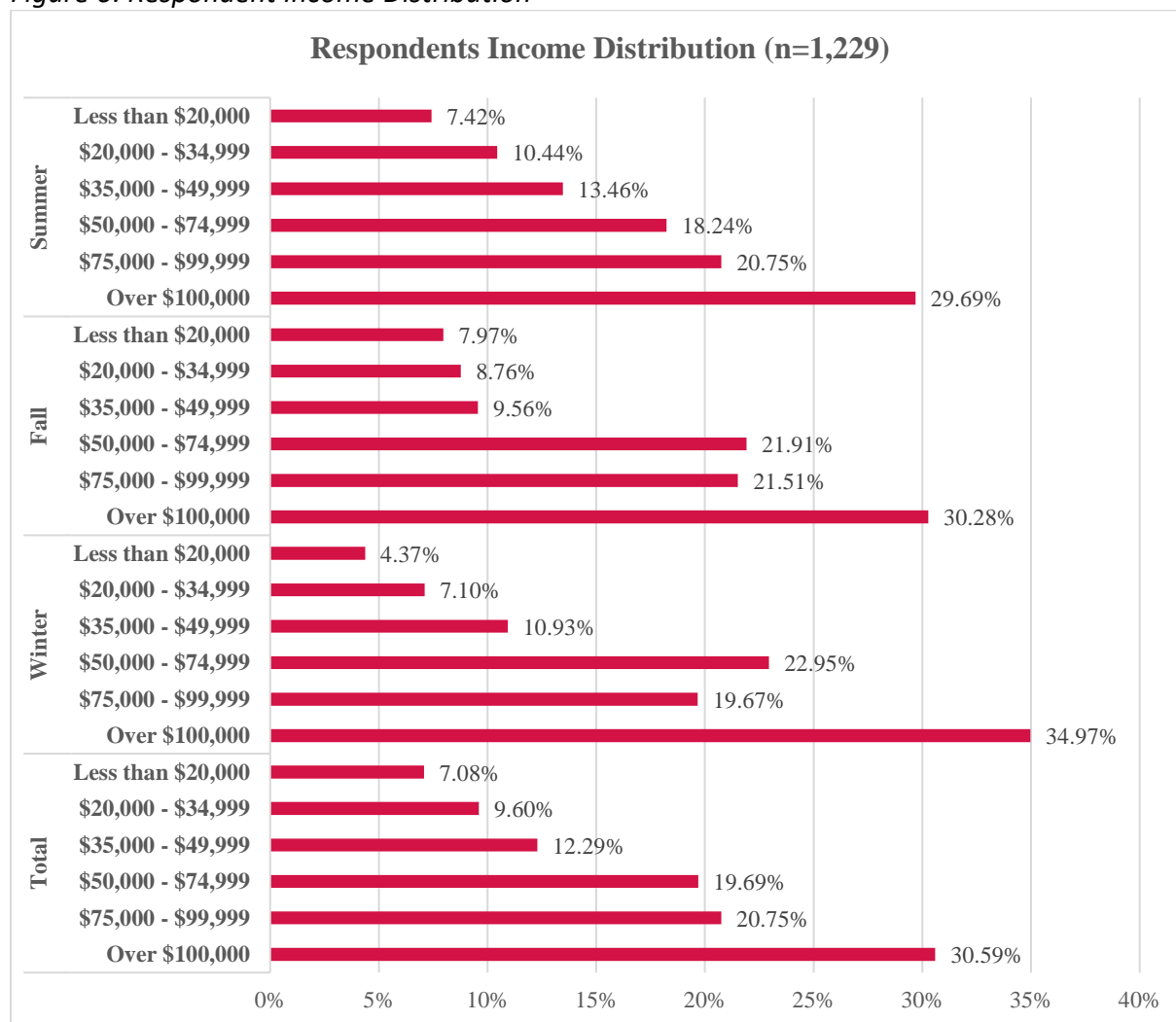
Figure 5: Respondent Residency Map (United States)



Household Income

The most frequently reported annual pre-tax household income (figure 6) was in the more than \$100,000 (30.59%), followed by \$75,000-\$99,999 (20.75%), followed by \$50,000-\$74,999 (19.69%). In sum, most respondents came from within a 60-mile radius and were above 50 years old. 51.34% of respondents reported their pre-tax annual household income over \$75,000; however, more than 20% of the surveys contained missing values for this variable.

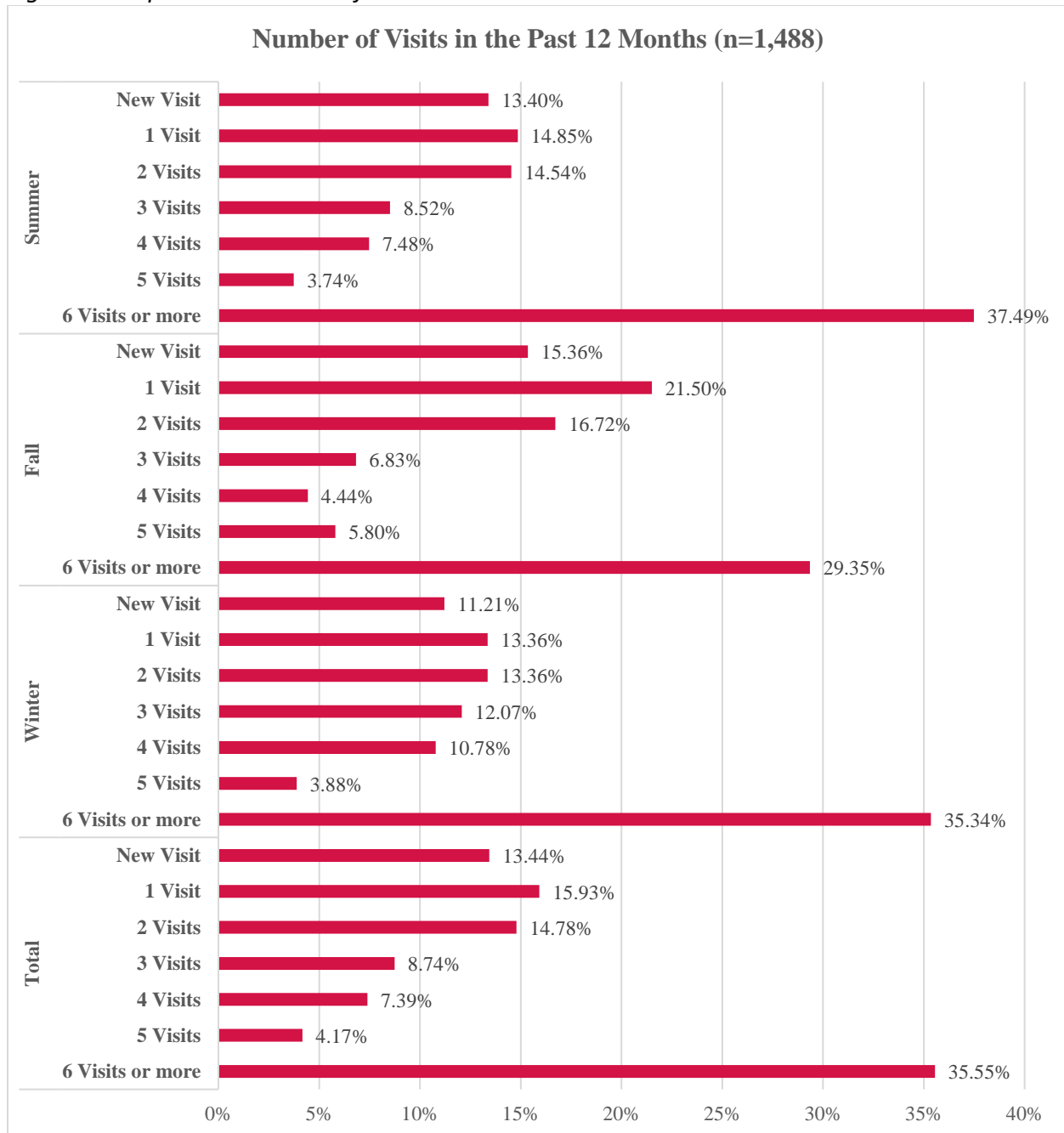
Figure 6: Respondent Income Distribution



Visit Frequency

13.44% of visitors visited the St. Cloud Metro Area for the first time and the majority of the respondents visited the St. Cloud Metro Area six or more times in the past 12 months (35.55%) (figure 7).

Figure 7: Respondent Number of Visits in the Past 12 Months

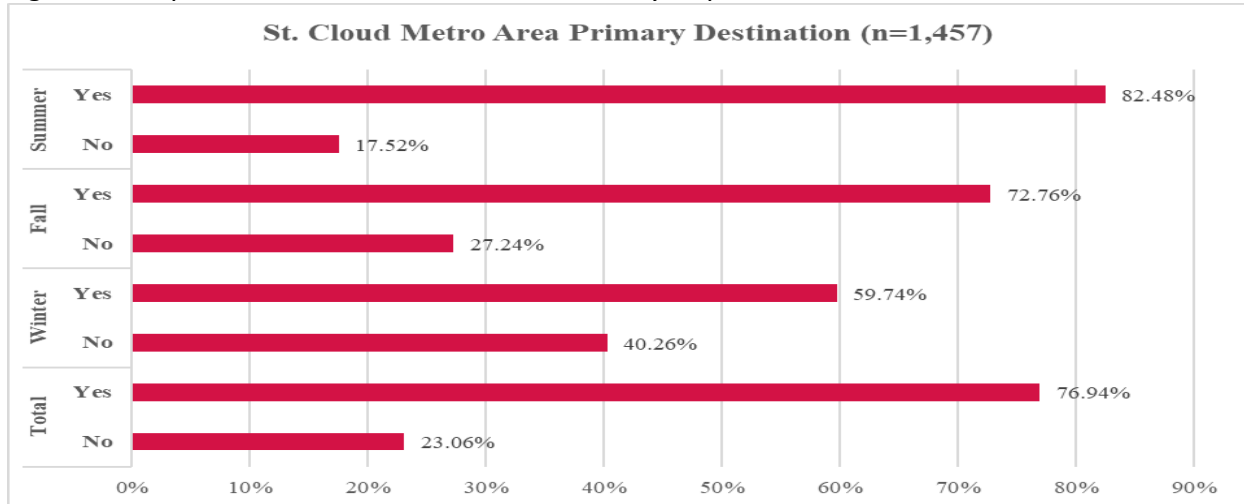


RESPONDENT TRIP DETAILS

Primary Destination: St. Cloud Metro Area

For 76.94%, the St. Cloud Metro Area was their primary destination. This was consistent among all three seasons (figure 8).

Figure 8: Respondent St. Cloud Metro Area Primary Trip Destination



Reasons for Visiting the St. Cloud Metro Area

The major reasons for visiting the St. Cloud Metro Area across the three seasons of summer, fall, and winter were a campus visit (18.57%), visiting family and friends (16.36%), and attending an art, music, or theatre event (12.48%, hereafter AMT) (figure 9). Reasons for visiting the St. Cloud Metro Area varied by three seasons (figure 10).

Figure 9: Respondent Reasons to Visit the St. Cloud Metro Area (seasons combined)

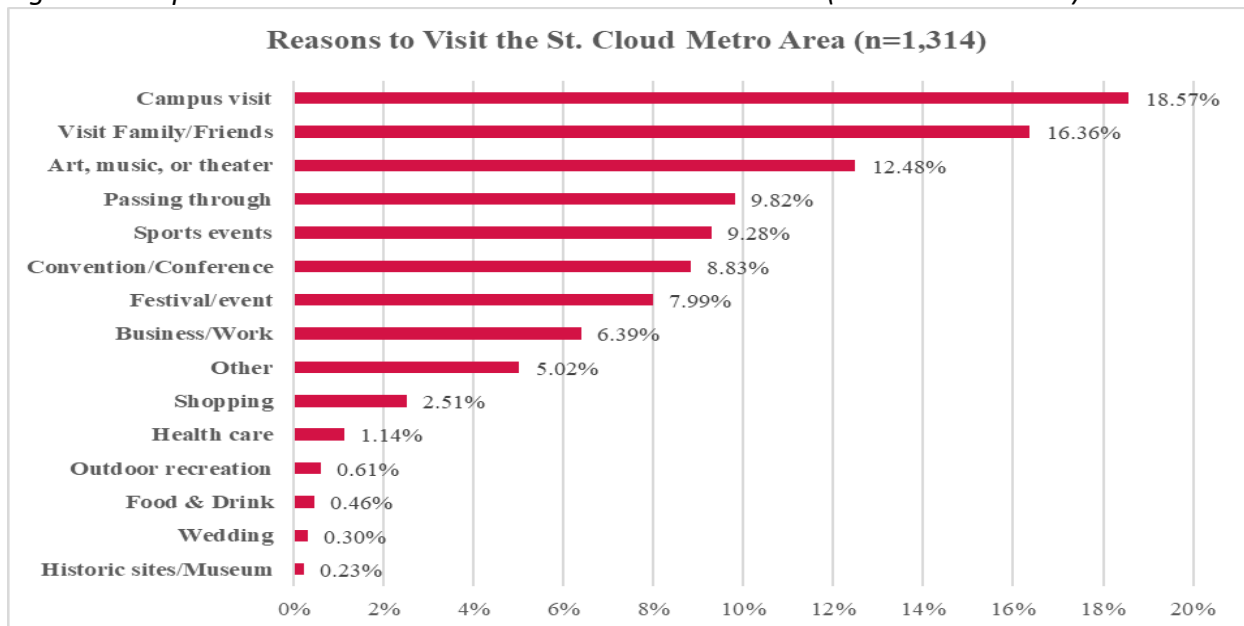
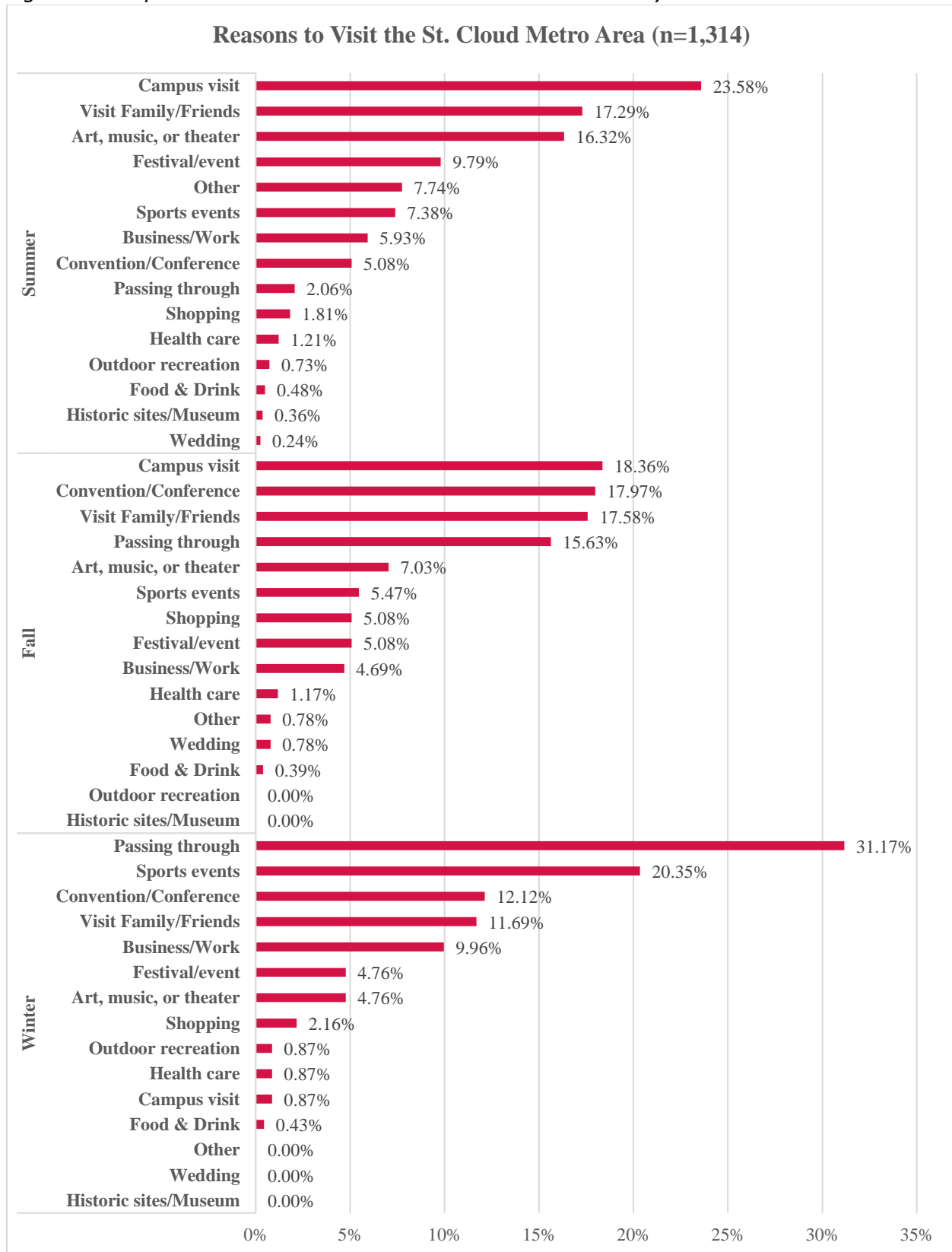


Figure 10: Respondent Reasons to Visit the St. Cloud Metro Area by Season



Average Stay & Accommodation Usage

An average of 44.33% of respondents stayed with family and friends, 35.33% of respondents stayed in hotels, and 7.3% of visitors stayed in private housing during the three seasons (figure 11). 47.54% of respondents did not use accommodations in the St. Cloud Metro Area (figure 12). It could be implied that most participants visit the area often and are not in need of accommodation as they live close to the St. Cloud Metro Area.

Figure 11: Respondent Accommodation Usage Distribution by Season

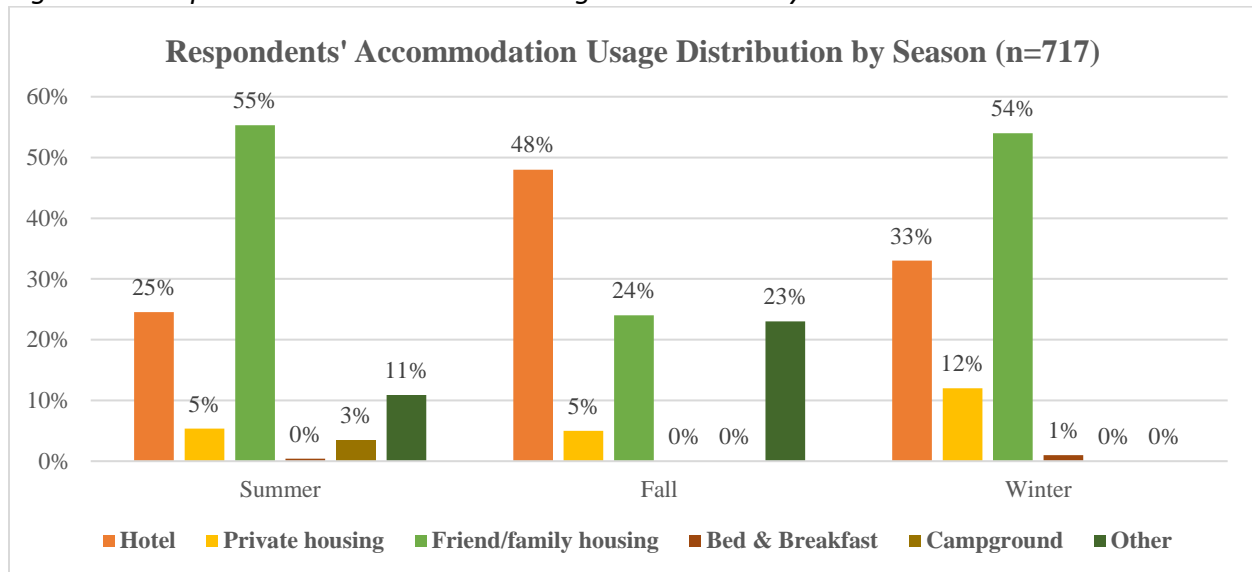
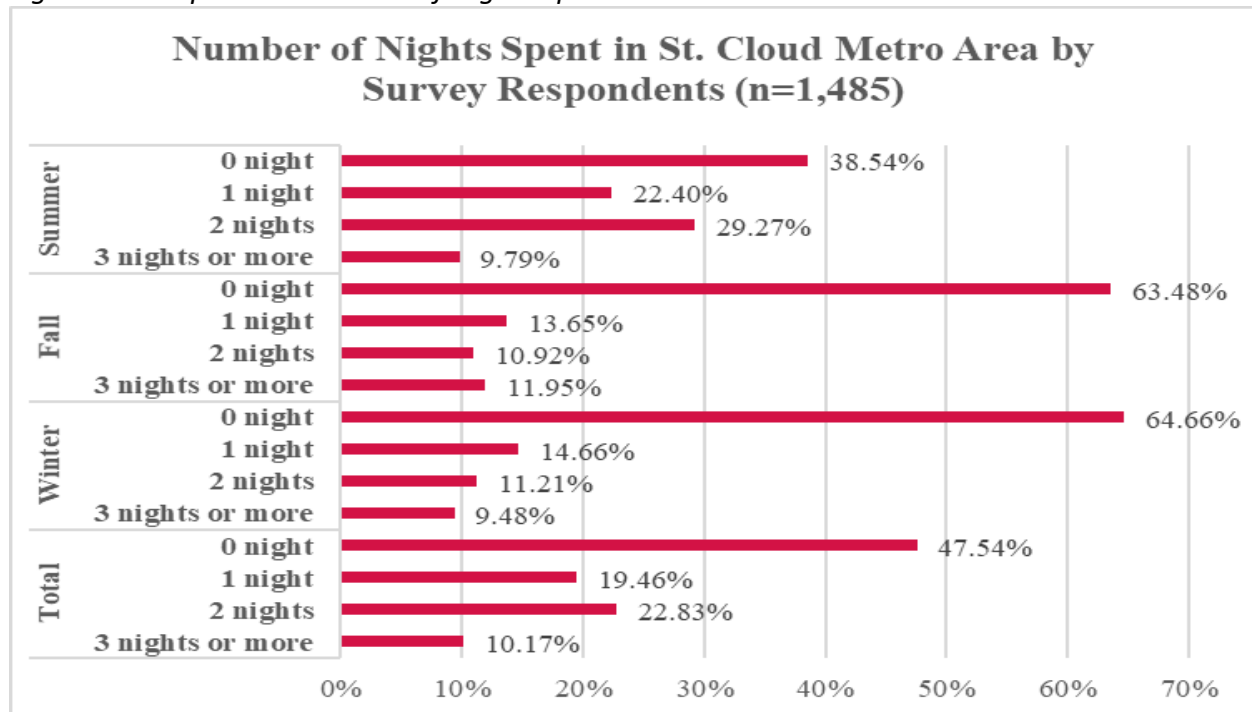


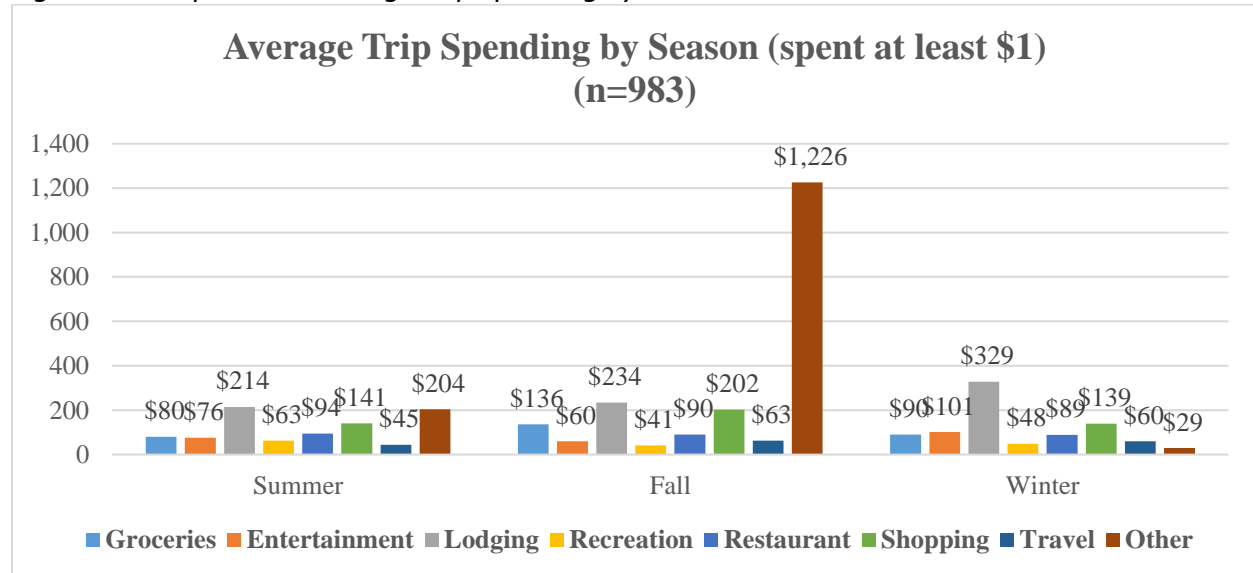
Figure 12: Respondent Number of Nights Spent in the St. Cloud Metro Area



Visitor Spending

While visiting the St. Cloud Metro Area, respondents reported spending the most money on Lodging for summer 2019 and winter 2020. For fall 2019, other was noted as the highest area of spending (figure 13). \$259 was the average amount spent on accommodations. Respondents spent an average of \$160 on shopping.

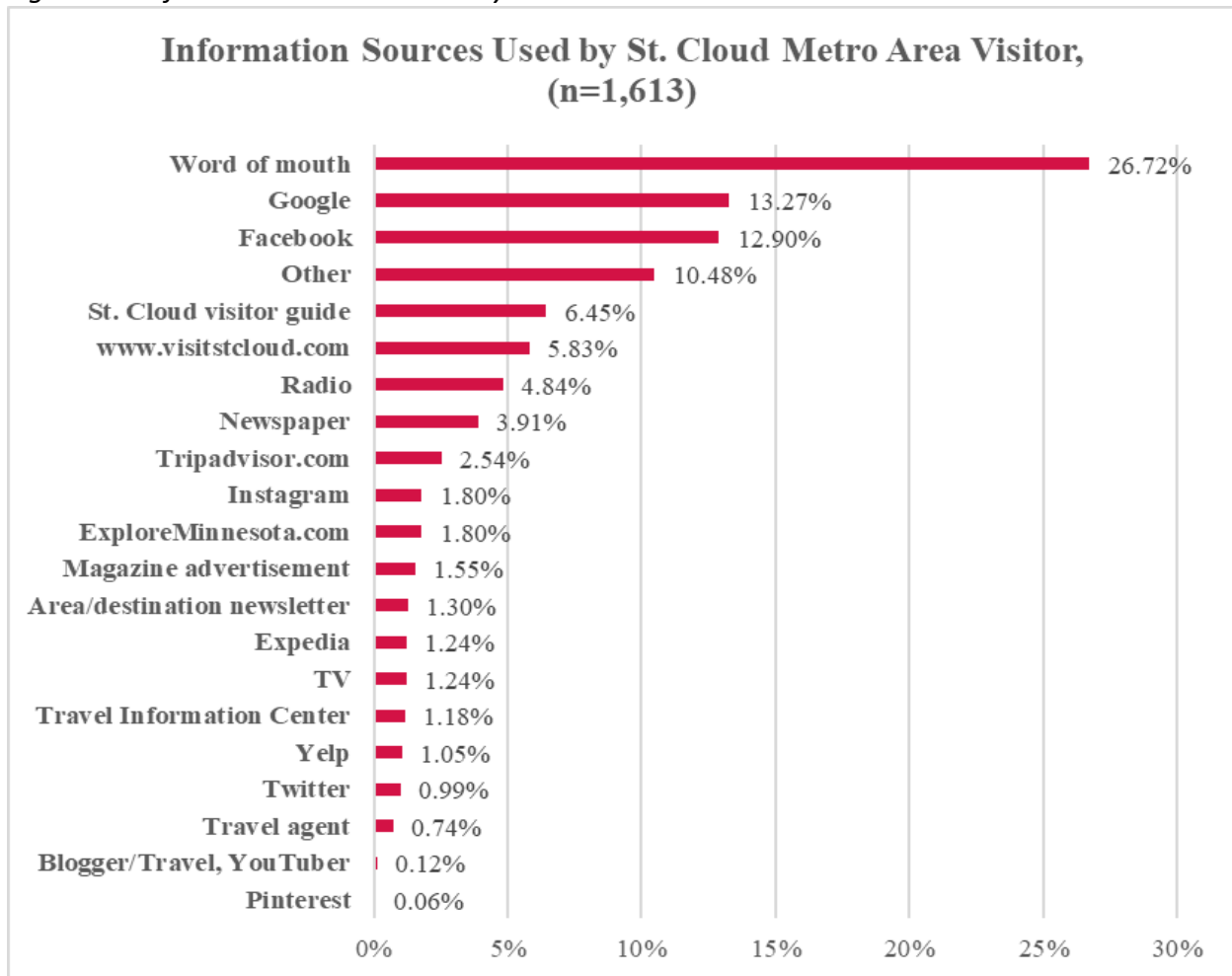
Figure 13: Respondent Average Trip Spending by Season



Visitor Information Sources

Few visitors used Instagram, ExlporeMinnesota.com, magazine advertisements, area/destination newsletters, Expedia, TV, Travel Information Center, Yelp, Twitter, travel agent, Blogger/YouTubers' or Pinterest as sources for destination information. Word of mouth ranked as the primary destination information source in all three seasons in which the survey was conducted—summer, fall, and winter (figure 14).

Figure 14: Information Sources Used by St. Cloud Metro Area Visitors



Visitor Satisfaction

The majority of respondents were extremely satisfied with their trip to the St. Cloud Metro Area (65.17%) (figure 15). 75.83% of respondents are most likely to revisit the St. Cloud Metro Area (figure 16) and 66.09% of respondents are strongly likely to recommend visiting the St. Cloud Metro Area to others (figure 17). Being extremely satisfied, most likely to revisit, and highly likely to recommend the St. Cloud Metro Area were consistent themes between all seasons.

Figure 15: Respondent Satisfaction Level

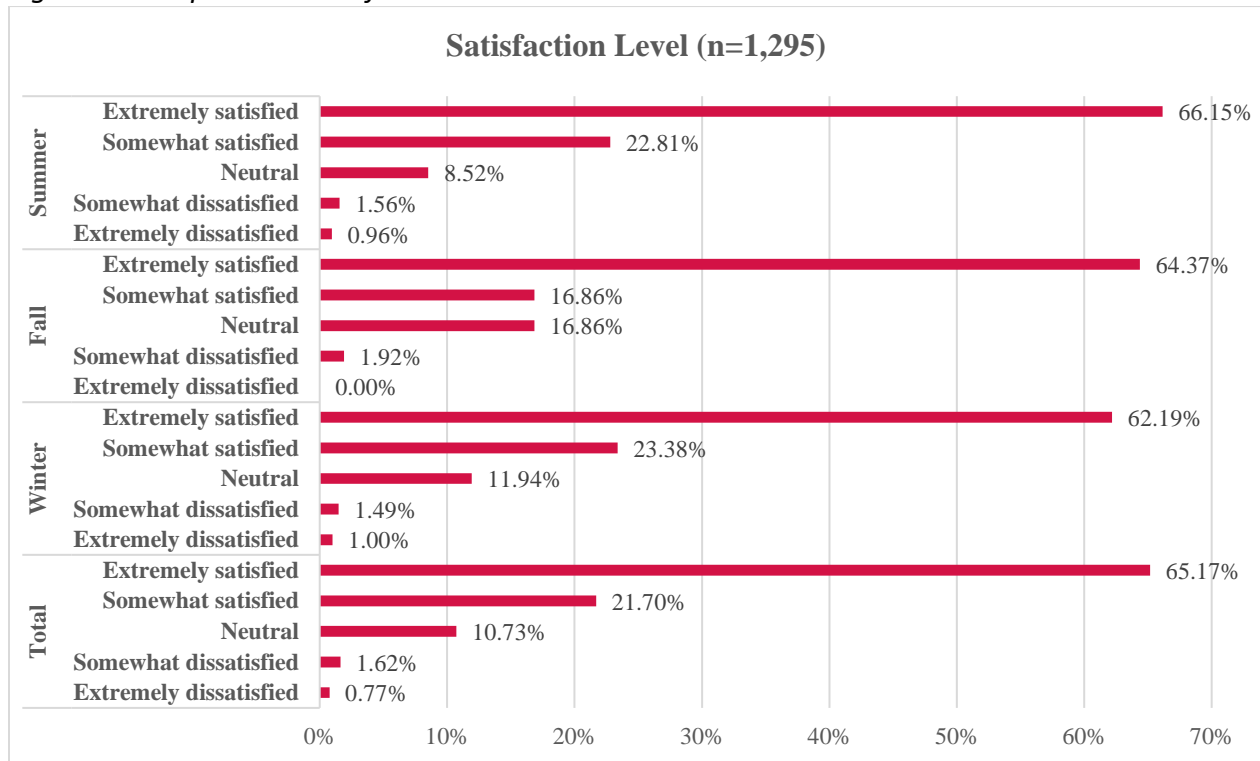


Figure 16: Respondent Likelihood to Revisit the St. Cloud Metro Area

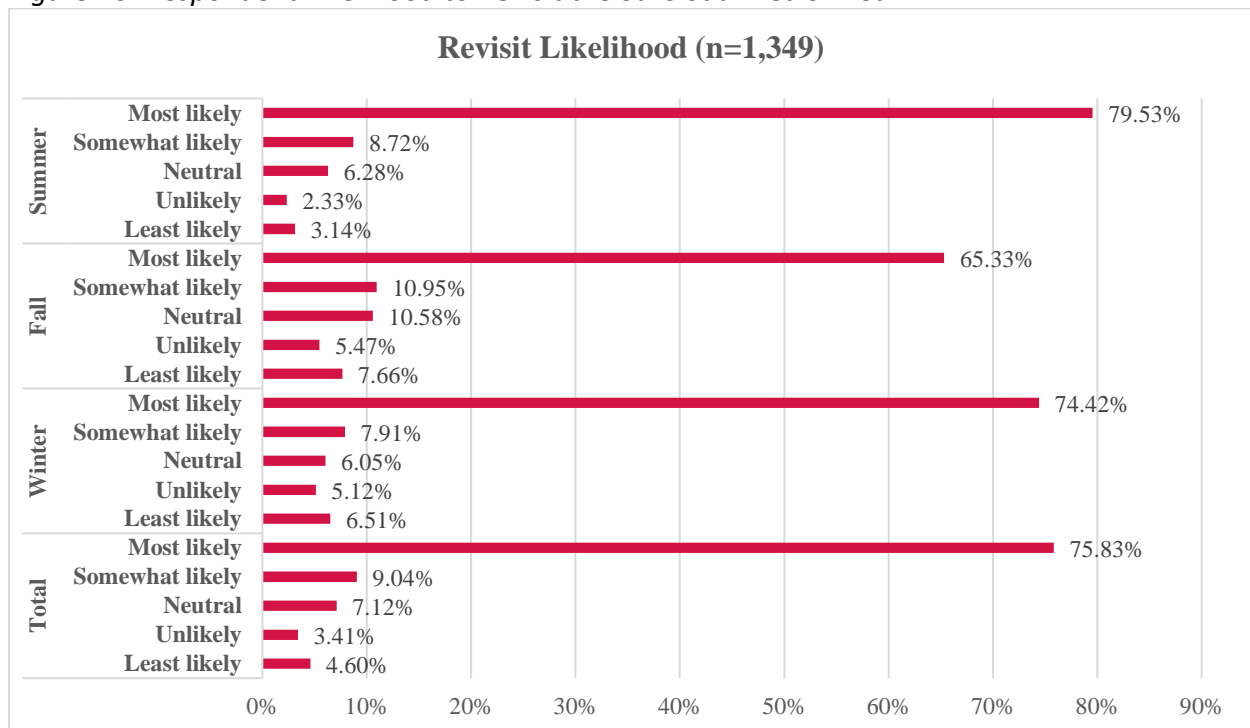
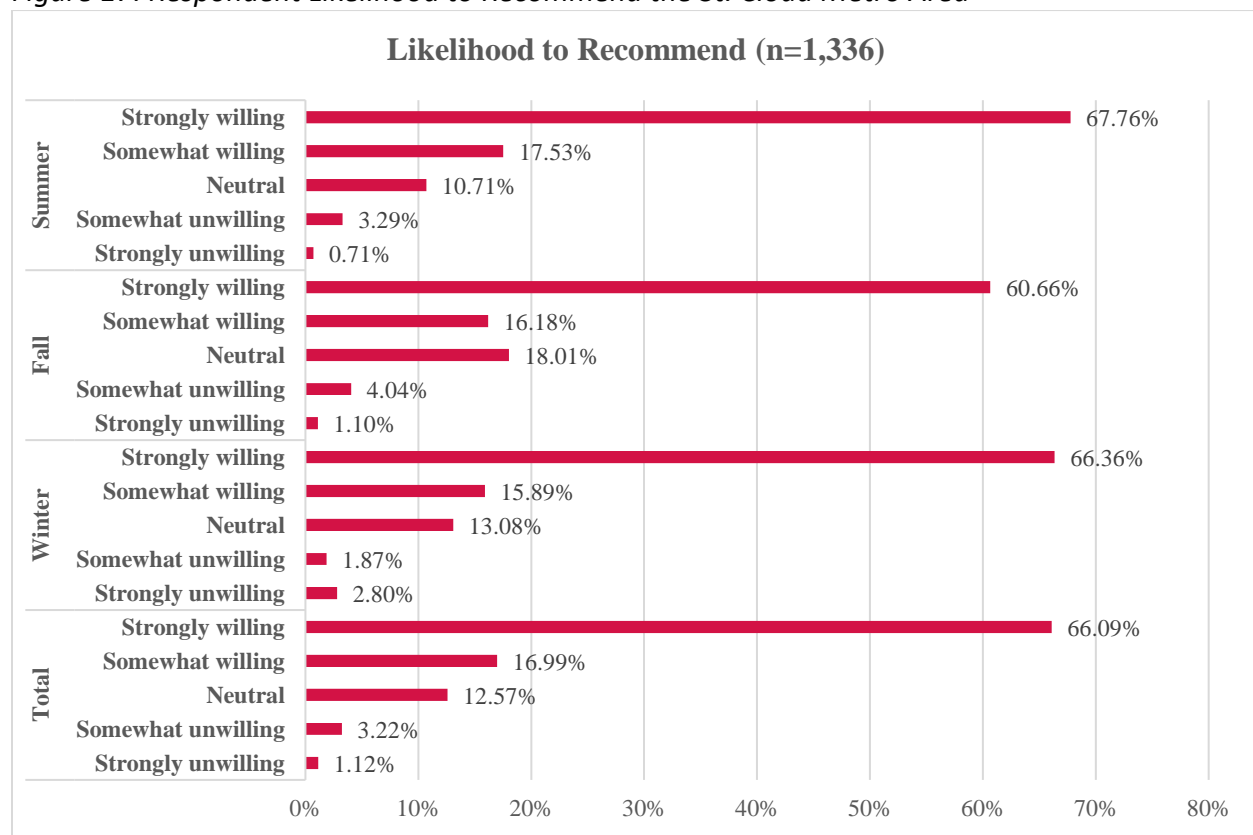


Figure 17: Respondent Likelihood to Recommend the St. Cloud Metro Area



RESIDENCY AS THE PREDICTOR FOR RESPONDENT'S TRAVEL BEHAVIORS AND DECISIONS

Respondent's residency status, local, in-state, and out-of-state, became the most significant factor in this study for predicting respondents' traveling behaviors, including their reasons for visiting, frequency of visits, group size, length of stay, and spending habits. For doing that, the respondents' residency was categorized into three groups in this study: local (living within a 60-mile radius of the St. Cloud).

Residency and Primary Trip Decision

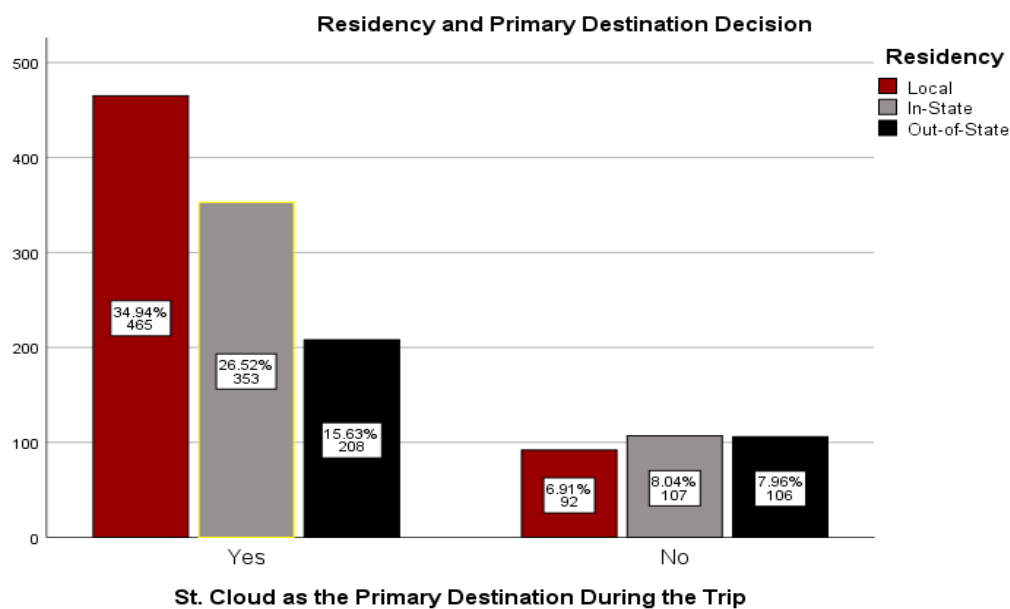
Primary destination choice differed significantly across three residency groups ($\chi^2=65.6999$, $p<0.05$, table 2 and figure 18). For those who choose the St. Cloud Metro Area as the trip final destination, we found that most were the local respondents (34.9%), followed by the in-state (26.5%) and out-of-state respondents (15.6%). For those who did not choose the St. Cloud Metro Area as their primary destination, most were the in-state respondents (8.04%), followed by the out-of-state (7.96%) and local respondents (6.9%).

Table 2: Comparisons of Primary Destination Choices by Residency (n=1,331)

Primary destination	Percentage (%) of Residency			Statistics		
	Local (within a 60-mile radius) (n=557)	In-State but outside a 60-mile radius (n=460)	Out of State (n=314)	χ^2	Sig.	
Yes	34.9	26.5	15.6	65.699	0.000	***
No	6.9	8.0	8.0			

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

Figure 18: Comparisons of Primary Destination Choices by Residency (n=1331)



Residency and Visiting Reasons

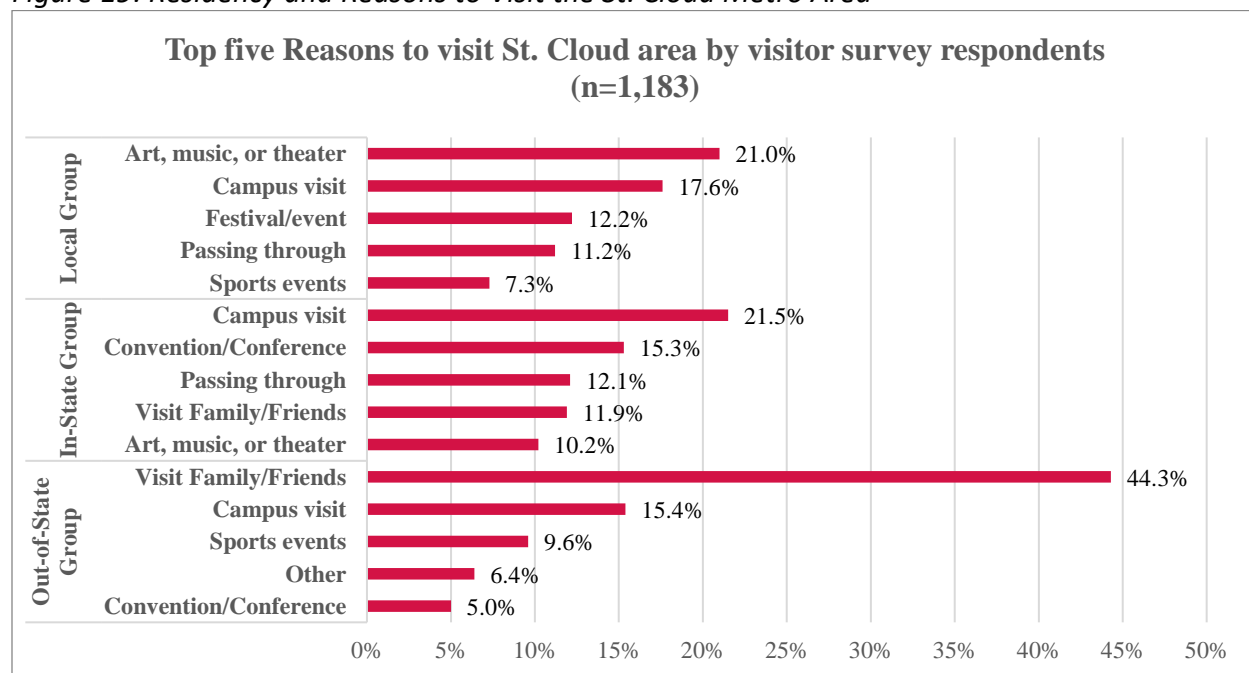
Respondents' residency differentiated significantly their primary reasons for visiting the St. Cloud Metro Area ($\chi^2=306.837$, $p < 0.00$, table 3 and figure 19). For local residents, the top three reasons for visiting the St. Cloud Metro Area were AMT (21.0%), campus visit (17.6%), and festival and events (12.2%). For in-state respondents, campus visit (21.5%), convention/conference (15.3%), and passing through (12.1%) were the most common reason for visiting. For out-of-state respondents, visiting family and relatives (44.3%) were the most significant reasons for visiting the St. Cloud Metro Area, followed by campus visits (15.4%) and sports events (9.6%).

Table 3: Comparisons of Visiting Reasons by Residency (n=1183)

Reason	Percentage (%) of Reason			Statistics		
	Local (within a 60-mile radius) (n=490)	In-State but outside a 60-mile radius (n=413)	Out of State (n=280)	χ^2	Sig.	
Art, music, or theater (AMT)	21.0	10.2	3.2	-	-	
Business/Work	17.6	6.1	4.6	-	-	
Campus visit	6.7	21.5	15.4	-	-	
Convention/Conference	5.3	15.3	5.0	-	-	
Festival/event	12.2	5.8	3.2	-	-	
Food & Drink	0.8	0.0	0.7	-	-	
Historic sites/Museum	0.2	0.2	0.4	-	-	
Health care	1.6	0.5	0.4	-	-	
Outdoor recreation	0.6	0.2	1.4	-	-	
Passing through	11.2	12.1	3.9	-	-	
Shopping	3.7	2.4	1.1	-	-	
Sports events	7.3	9.2	9.6	-	-	
Visit Family/Friends	5.5	11.9	44.3	-	-	
Wedding	0.1	0.5	0.4	-	-	
Other	5.9	4.1	6.4	-	-	

*** $p < 0.00$

Figure 19: Residency and Reasons to Visit the St. Cloud Metro Area



Residency and Activity

The most popular activities (figure 20) for all residency groups were dining out (72.2% of all responses), followed by shopping (46.4%) and festivals/fairs attending (35.8%). Specifically, the three residency groups differentiated significantly based on their participation in the following activities (table 4): dining out ($\chi^2=61.633$, $p<0.00$), health and medical treatment ($\chi^2=11.209$, $p<0.01$), sightseeing ($\chi^2=65.466$, $p<0.00$), hiking ($\chi^2=20.613$, $p<0.00$), kayaking/canoeing ($\chi^2=26.159$, $p<0.00$), other outdoor activities ($\chi^2=21.117$, $p<0.00$), brewery/winery ($\chi^2=13.354$, $p<0.01$), friends/relatives ($\chi^2=106.050$, $p<0.00$), museum/library ($\chi^2=25.723$, $p<0.00$), parks ($\chi^2=17.974$, $p<0.00$), festivals/events ($\chi^2=20.654$, $p<0.00$), sporting events ($\chi^2=8.922$, $p<0.05$), shows/music concerts ($\chi^2=19.984$, $p<0.00$), and wedding ($\chi^2=16.902$, $p<0.00$).

The out-of-state respondents accounted for 37.2% of the dining-out activity, followed by the in-state (33.4%) and the out-of-state respondents (29.4%).

About 7.6% of total respondents indicated they participated in medical/health treatment during their stays in the St. Cloud Metro Area. Most participants were from within a 60-mile radius (56.7%), followed by the out-of-state (22.7%) and in-state respondents (20.6%).

About 20% of total respondents reported that they participated in the sightseeing activity when they traveled to the St. Cloud Metro Area. Specifically, the out-of-state respondents accounted for the biggest proportion in this activity category (42.9%), followed by the local (33.3%) and in-state respondents (23.8%).

For the hiking activity, less than 5% of the total respondents stated that they participated in this activity during their trips to the St. Cloud Metro Area. Most of them were from out of Minnesota (47.5%) and within a 60-mile radius (27.9%), followed by the in-state respondents (24.6%).

Not so many respondents (2.6% of the total) reported that they went kayaking or canoeing during their stay in the St. Cloud Metro Area. Most of them were from out of Minnesota (60.6%), followed by the in-state (21.2%) and local respondents (18.2%).

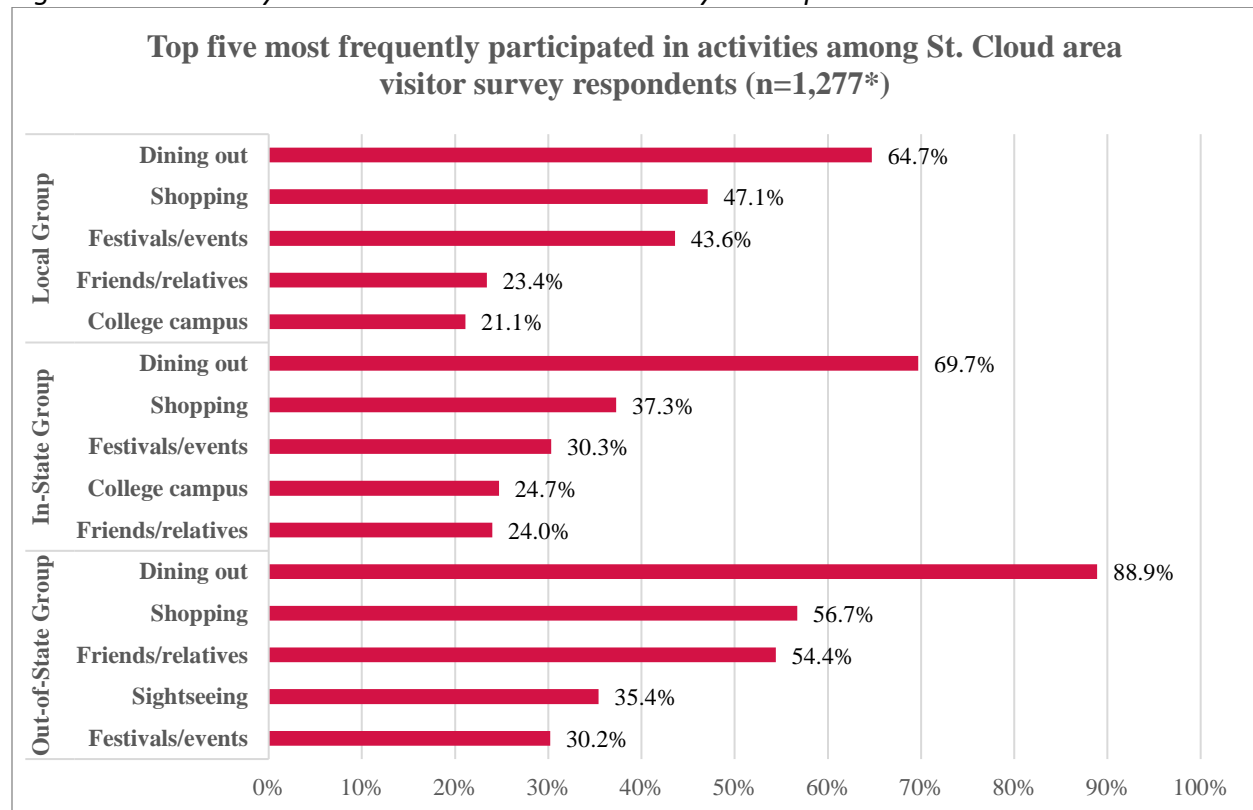
About 15% of total respondents reported that they participated in outdoor activities (except biking, fishing, hiking, and kayaking/canoeing). Most of them were the local respondents (39.1%), followed by the out-of-state (35.9%) and the in-state respondents (25.0%).

About 10% of total respondents reported they visited the brewery/winery during their trips to the St. Cloud Metro Area. Respondents' residency differed significantly in their visit to the brewery/winery where the local respondents accounted for the most visits (37.5%), followed by the out-of-state (36.7%) and in-state respondents (25.8%).

About 30% of total respondents reported visiting friends and relatives was one of the activities when they were in the St. Cloud Metro Area. Respondents' residency differed significantly in

their visits to friends and relatives. The out-of-state respondents accounted for most visits (41.9%), followed by the in-state (26.8%) and local respondents (31.3%).

Figure 20: Residency and St. Cloud Metro Area Activity Participation



* The total number of responses is 1,509 but this is a multiple-selection question and respondents would give more than one answer for this question.

Less than 5% of total respondents indicated that they visited the museum or library during their trips to the St. Cloud Metro Area. Visiting museums/libraries was significantly differentiated by respondents' residency. Most were the out-of-state respondents (49.2%), followed by the local (36.1%) and in-state respondents (14.8%).

About 18.6% of total respondents reported that they visited parks during their trips to the St. Cloud Metro Area. Park visiting was significantly differentiated by respondents' residency. The local respondents account for most visits (45.4%), followed by the out-of-state (31.1%) and in-state (23.5%) respondents.

Participating in festivals/events was one of the most popular activities across three residency groups and about 35.8% of total respondents reported that they participated in various festivals or events during their trips to the St. Cloud Metro Area. Respondents' residency differed significantly in festival/event participation. The local respondents accounted for the biggest proportion in this category (50.5%), followed by the in-state (29.3%) and out-of-state respondents (20.1%).

About 12% of total respondents indicated that they participated in different sports events when they were in the St. Cloud Metro Area. Respondents' residency significantly differed in their participation in sports events. Most were the local respondents (41.4%), followed by the out-of-state (32.2%) and the in-state (26.3%) respondents.

Table 4: Comparisons of Activities by Residency (n=1,227)

Activity	Percentage (%) of activity participation			Statistics		
	Local Group (n=76)	In-State Group (n=73)	Out-of-State Group (n=39)	χ^2	Sig.	
Dining out	64.7 (37.2 ₁)	69.7(33.4)	88.9(29.4)	61.633	.000	***
Health care/medical treatment	10.4 (56.7)	4.5 (20.6)	7.2(22.7)	11.209	.004	**
Nightlife/evening entertainment	18.5	16.1	20.7			
Shopping	48.1	37.3	56.7			
Sightseeing	15.8(33.3)	13.6(23.8)	35.4(42.9)	65.466	.000	***
Meeting	10.4	14.0	9.8			
Biking	3.0	1.6	3.9			
Fishing	3.8	1.4	14.8			
Hiking	3.2(27.9)	3.4(24.6)	9.5(47.5)	20.613	.000	***
Kayaking/canoeing	1.1(18.2)	1.6(21.2)	6.6(60.6)	26.159	.000	***
Skateboard/BMX	0.2	0.2	0.3			
Other outdoor activities	14.2(39.1)	10.9(25.0)	22.6(35.9)	21.117	.000	***
Brewery/winery	9.1(37.5)	7.5(25.8)	15.4(36.7)	14.354	.001	**
Friends/relatives	23.4(31.3)	24.0(26.8)	54.4(41.9)	106.50	.000	***
College campus	21.1	24.7	24.9			
Museum/library	4.2(36.1)	2.0(14.8)	9.8(49.2)	25.723	.000	***
Parks	20.4(45.4)	12.7(23.5)	24.3(31.1)	17.974	.000	***
Festivals/events	43.6(50.5)	30.3(29.3)	30.2(20.1)	20.654	.000	***
Homecoming/class reunion	1.3	2.0	2.0			
Sporting events	11.9(41.4)	9.0(26.3)	16.1(32.2)	8.922	.012	*
Shows/music concerts	20.2(54.0)	9.5(21.2)	16.1(24.7)	19.984	.000	***
Wedding/family reunion	3.2(38.3)	2.3(19.6)	7.9(47.1)	16.902	.000	***

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

₁: The percentage within this paraphrase is the frequency distribution within this activity category

About 15.5% of total respondents reported that they attended the shows and music concerts during their trips to the St. Cloud Metro Area, including the local residency respondents (54.0%), the out-of-state respondents (24.7%), and the in-state respondents (21.2%).

Wedding or family reunion was not a common activity for any of the three residency groups. Only about 4% of total respondents indicated they participated in wedding or family reunion activity during their trip to the St. Cloud Metro Area. Specifically, most were the out-of-state respondents (47.1%), followed by the local (33.3%) and in-state respondents (19.6%).

Residency and age, spending, and number of nights

Information about age, spending, and the number of nights is presented in Table 5. There was a statistically significant difference regarding the average age at the $p < 0.05$ level for the three residency groups [$F(2,1286) = 3.34$, $p < 0.05$]. Post hoc comparisons by the Bonferroni test suggested that the local respondents ($M = \$55.76$, $SD = 14.06$) were significantly older than the in-state respondents ($M = \$53.30$, $SD = 15.85$).

Table 5: Comparisons of Respondents' Ages, Trip Details, and Expenditures by Residency Group (n=1,032)

	Residency Group	n	Mean		SD
Average age	Local	535	55.76	a	14.06
	In-State	448	53.30	a	15.85
	Out-of-State	306	55.14		15.98
Spending (spent at least one US dollar)					
Total	Local	367	207.95	b	724.69
	In-State	357	216.29	c	307.79
	Out-of-State	259	361.16	b, c	520.48
Groceries	Local	121	86.72		131.44
	In-State	62	84.63		95.76
	Out-of-State	90	94.36		136.78
Entertainment	Local	93	80.10		212.67
	In-State	61	59.31		45.32
	Out-of-State	36	99.75		148.29
Lodgings	Local	18	138.28		70.20
	In-State	99	210.78		196.15
	Out-of-State	88	308.73		534.00
Recreation	Local	61	57.21		131.32
	In-State	47	48.64		37.15

	Out-of-State	44	57.07		60.27
Restaurant	Local	198	78.19	d	179.15
	In-State	243	78.45	e	89.15
	Out-of-State	208	124.62	d, e	188.69
Shopping	Local	132	141.21		432.98
	In-State	101	169.88		210.14
	Out-of-State	102	151.69		193.70
Travel	Local	131	29.95	f	25.75
	In-State	143	48.11	g	58.86
	Out-of-State	121	74.55	f, g	107.95
Other	Local	21	688.71		1595.26
	In-State	18	118.61		149.38
	Out-of-State	12	143.08		148.95
Total nights (at least one night)					
	Local	198	9.56		73.95
	In-State	283	5.28		59.29
	Out-of-State	236	5.26		12.91
Accommodation Usage (More than one night)					
Hotel	Local	26	1.31		0.47
	In-State	119	1.73		0.82
	Out-of-State	106	3.58		11.63
Private housing	Local	9	3.22		3.35
	In-State	7	1.86		0.90
	Out-of-State	11	5.91		5.26
Friend/family housing	Local	34	14.06		51.19
	In-State	43	2.16		1.59
	Out-of-State	83	9.33		18.82
B & B	Local	1	2.00		
	In-State	2	1.50		0.71
	Out-of-State	1	2.00		
Campground	Local	3	2.00		1.00

	In-State	3	1.67	0.58
	Out-of-State	7	4.29	6.97
Other	Local	3	23.67	19.63
	In-State	7	7.14	12.47
	Out-of-State	10	7.10	13.01

a: $p < .05$; b: $p < .01$; c: $p < .01$; d: $p < .01$; e: $p < .01$; f: $p < .00$; g: $p < .01$

The relationship between respondents' residency and their total expenditures was statistically significant [$F(2,980)=7.05$, $p < 0.01$]. Post hoc comparisons using the Bonferroni test indicated that the mean of total expenditures of the out-of-state respondents ($M=\$361.16$, $SD=520.48$) was significantly different from the local ($M=\$207.95$, $SD=724.69$) and the in-state respondents ($M=\$216.29$, $SD=307.79$). The out-of-state respondents tended to outspend more than the local and the in-state respondents during their stay in the St. Cloud Metro Area.

As for the specific categories of spending among the three residency groups, there were statistically significant differences in the means of expenditures in various consumption categories between the three residency groups, including the restaurant expenditures [$F(2,646)=6.26$, $p < 0.01$] and the travel-related expenditures [$F(2,392)=12.50$, $p < 0.00$]

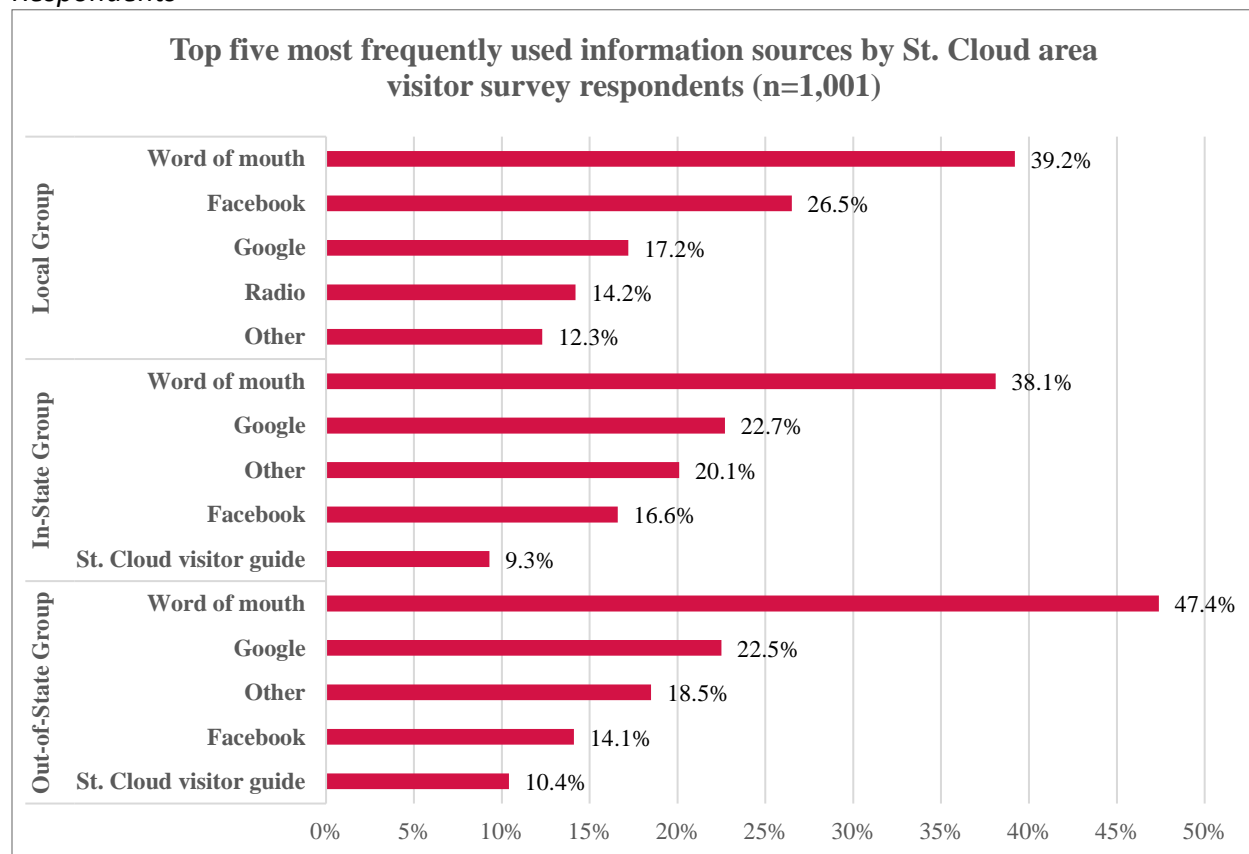
The out-of-state respondents spent more money at the restaurants ($M=\$124.62$, $SD=188.67$) than the local respondents ($M=\$78.19$, $SD=179.15$). The out-of-state respondents spent more money at the restaurants ($M=\$124.62$, $SD=188.67$) than the in-state respondents ($M=\$78.45$, $SD=89.15$), respectively.

For the spending in the travel-related items, the out-of-state respondents ($M = \$74.55$, $SD = 107.95$) spent significantly more on it than the local respondents ($M = \$29.95$, $SD=25.75$) and the out-of-state respondents spent significantly more on it ($M = \$74.55$, $SD = 107.95$) than the in-state respondents ($M = \$48.11$, $SD = 58.86$).

Residency and Information Sources

Word of mouth was noted as the top source for all residency groups when obtaining information about the area (figure 21). Google was noted in the top three ways of obtaining information for all three groups. Moreover, residency significantly differentiated the use of exploremn.com ($\chi^2=12.089$, $p<0.01$), newspaper ($\chi^2=16.494$, $p<0.00$), word of mouth ($\chi^2=9.44$, $p<0.01$), radio ($\chi^2=4.458$, $p<0.00$), Facebook ($\chi^2=14.037$, $p<0.01$), Tripadvisor.com ($\chi^2=15.915$, $p<0.00$), Expedia.com ($\chi^2=11.555$, $p<0.01$), and Yelp ($\chi^2=8.429$, $p<0.05$) (table 6).

Figure 21: Top five most frequently used information sources by St. Cloud Metro Area Visitor Respondents



Specifically, less than 3% of total respondents indicated that they used exploremn.com to obtain destination information for their trip to the St. Cloud Metro Area. Respondents' residency significantly differed in using exploremn.com as their travel information source. Most were the out-of-state respondents (50.0%), followed by the local (34.6%) and the in-state (15.4%) respondents.

About 6% of total respondents reported that they obtain the travel information from newspapers, including the local residency respondents (67.2%), the out-of-state respondents (17.2%), and the in-state respondents (15.5%).

Word of mouth was the most prevailing travel information source when the respondents plan their trips to the St. Cloud Metro Area. More than 40% of total respondents indicated word of mouth is their major destination information source. Specifically, Respondents' residency significantly differed in using word of mouth as their destination information source. The local respondents accounted for the biggest proportion in this category (39.1%), followed by the in-state (32.0%) and out-of-state respondents (28.9%).

Table 6: Comparisons of Information Sources by Residency (n=1,001)

	Percentage (%) of Information Source Used			Statistics		
	Local (within 60-mile radius) (n=408)	In-State (outside 60-mile radius) (n=344)	Out of State (n=240)	χ^2	Sig.	
Information source						
www.visitstcloud.com	10.0	6.1	10.4			
St. Cloud visitor guide	10.0	9.3	10.4			
Area/destination newsletter	2.0	1.7	2.0			
Magazine advertisement	3.7	1.7	1.6			
ExploreMinnesota.com	2.2(34.6 ₂)	1.2(15.4)	5.2(50.0)	11.089	.004	**
Travel Information Center	1.7	1.5	2.0			
Newspaper	9.6(67.2)	2.6(15.5)	4.0(17.2)	16.494	.000	***
Travel agent	0.7	2.0	0.8			
Blogger/Travel YouTuber	0.5	0.0	0.0			
Word of mouth	39.2(39.1)	38.1(32.0)	47.4(28.9)	9.440	.009	**
Radio	14.2(79.5)	2.3(11.0)	2.8(9.6)	44.458	.000	***
TV	2.0	0.9	2.4			
Facebook	26.5(54.0)	16.6(28.5)	14.1(17.5)	14.037	.001	**
Twitter	0.7	2.3	2.0			
Google	17.2	22.7	22.5			
Instagram	2.0	3.5	3.6			
Pinterest	0.0	0.0	0.4			
Tripadvisor.com	2.2(22.0)	3.5(29.3)	8.0(48.8)	15.915	.000	***
Expedia	0.5(10.5)	2.0(36.8)	4.0(52.6)	11.555	.003	**
Yelp	1.2(29.4)	0.9(17.6)	3.6(52.9)	8.429	.015	*
Other	12.3	20.1	18.5			

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

² The percentage within this paraphrase is the frequency distribution within this information source category

About 7.3% of total respondents reported that they obtained the destination information from radio, including the local residency respondents (79.5%), the in-state respondents (11.0%), and the out-of-state respondents (9.6%). Most non-local respondents would not use radio as their information source to learn about the St. Cloud Metro Area.

Facebook served as the destination information source as about 20% of total respondents reported they used it to learn about the St. Cloud Metro Area. Respondents' residency significantly differed in using Facebook as the information source. The local respondents accounted for the biggest proportions in this category (54.0%), followed by the in-state (28.5%) and out-of-state (17.5%) respondents.

Tripadvisor.com, Expedia.com, and Yelp were the most popular destination information sources for the out-of-state respondents. Tripadvisor.com served as a major destination information source for out-of-state (48.8%) respondents, followed by the in-state (29.3%) and, to a lesser extent, local respondents (22.0%). Most out-of-state visitors (52.6%) also liked to use Expedia.com as a source of destination information, and this website was also used to a lesser degree by the in-state (36.8%) and local respondents (10.5%). Besides, Yelp was used mostly by the out-of-state respondents (52.9%), followed by the local (29.4%) and then in-state respondents (17.6%).

Residency and Satisfaction

The local respondents tended to revisit the St. Cloud Metro Area in the future than in-state and out-of-state respondents (figure 22). Respondents' residency statuses play an important role in their revisit decision. Namely, local respondents demonstrated the highest level of revisit intention due to their proximity to the St. Cloud Metro Area. However, in-state and out-of-state residents also demonstrate relatively high levels of revisit intention. More than 80% of respondents would like to revisit the St. Cloud Metro Area in the future.

The relationships between respondents' residency and their revisit intentions were statically significant [$F(2, 1279)=23.617, p<0.00$] (table 7). Post hoc comparisons using the Bonferroni test indicated that the mean of revisit intention of the out-of-state respondents ($M=4.19, SD=1.292$) was significantly different than the local ($M=4.70, SD=0.805$) and the in-state respondents ($M=4.46, SD=1.071$).

The relationships between respondents' residency and their recommendation intentions were statically significant [$F(2, 1235)=1.112, p<0.00$]. Post hoc comparisons using the Bonferroni test indicated that the mean of recommendation intention of the out-of-state respondents ($M=4.33, SD=0.941$) was significantly different than the local ($M=4.56, SD=0.850$) and the in-state respondents ($M=4.38, SD=0.913$). Due to the high correlation between the revisit and recommendation, the findings demonstrated a very similar pattern. The local respondents were more likely to recommend the St. Cloud Metro Area to others than their in-state counterparts, while the in-state respondents were also more likely to recommend the St. Cloud Metro Area to others than those who lived out of Minnesota did.

There was no statistically significant difference in satisfaction among the three residency groups. It was suggested that most respondents were satisfied with their trip experiences during their stay at the St. Cloud Metro Area.

Figure 22: Comparisons of Respondents' Revisit, Recommendation, and Satisfaction levels by Residency Group

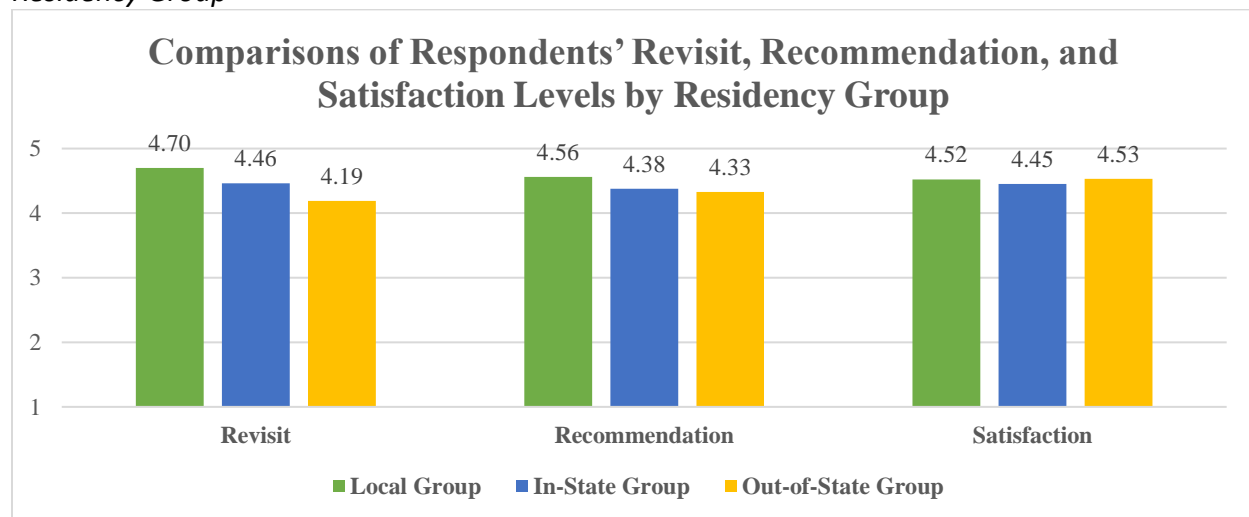


Table 7: Comparisons of Respondents' Revisit, Recommendation, and Satisfaction levels by Residency Group

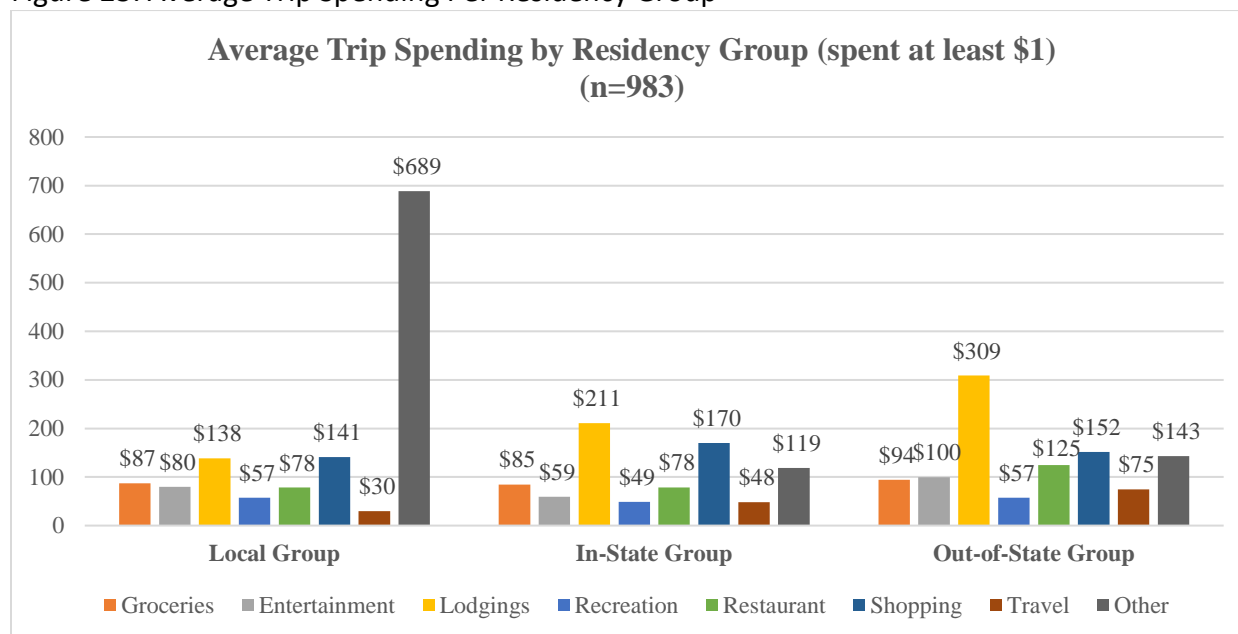
	Residency Group	n	Mean	SD
Revisit	Local	533	4.70	0.805
	In-State	448	4.46	1.071
	Out-of-State	301	4.19	1.292
Recommendation	Local	527	4.56	0.850
	In-State	449	4.38	0.913
	Out-of-State	303	4.33	0.941
Satisfaction	Local	513	4.52	0.810
	In-State	431	4.45	0.799
	Out-of-State	294	4.53	0.760

h: $p < .01$; i: $p < .01$; j: $p < .01$; k: $p < .01$; l: $p < .01$

Residency and Average Trip Spending

Most respondents reported spending the most money on lodging for summer 2019 and winter 2020. For fall 2019, other was noted as the highest area of spending (figure 23). \$259 was the average amount spent on accommodations. Respondents spent an average of \$160 on shopping.

Figure 23: Average Trip Spending Per Residency Group



ST. CLOUD VISITOR ECONOMIC IMPACT

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. 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. Critical data for this analysis came from a survey of visitors to St. Cloud. A survey of St. Cloud visitors was conducted in the 2019 summer, 2019 fall, and 2020 winter. There were 984 surveys collected in summer, 293 in fall, and 232 in winter. Data collection was planned for the spring of 2020; however, the COVID-19 pandemic resulted in the cancellation of such efforts.

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.

In 2019, there were 1,576 hotel rooms in the City of St. Cloud. Hotels reported an average daily occupancy rate of 61.8 percent during the previous 5 year period. Assuming an average of 2.5 visitors per room, this yields a total of 888,745 visitors to St. Cloud per year (table 8).

Table 8: Estimated Number of 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

To calculate impact by season, one must also have a measure of visits by season. Visit Greater St. Cloud, the local conventions and visitors' bureau, provided a summary of hotel lodging tax receipts by season (table 9). From this, one can get a sense of visits per season. Of total lodging tax receipts, 28 percent come from summer, the highest season, followed by 27 percent in spring. Using these rates, the highest number of overnight visitors came to St. Cloud in the summer – an estimated 245,569 visitors. Winter has the lowest figure at 188,065.

Table 9: Estimated Number of St. Cloud Visitors by Season, 2019

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

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 daily visitors. While the number of overnight visitors was higher in summer and spring, day visits were higher in fall and winter.

Visitor Spending

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.

On average, St. Cloud visitors in summer spent \$142.17 per person per day. Major expenditures included dining out, lodging, and shopping (table 10). Spending was slightly lower in fall when visitors spent an average of \$130.06 and lower still in winter, with an average of \$111.95.

In order to have an annual estimate of economic impact, we calculated an estimated spending profile for spring. The data collected indicate a fairly reasonable range of \$112 in the slower winter season to \$142 in the busier summer season. The hotel occupancy data indicates spring visitation is closely aligned to summer and fall. Therefore, to calculate spring spending, we weighted the average of spring and fall spending by hotel occupancy.

Table 10: Average Spending per Person per Day by Season: St. Cloud Visitors

Category	Summer 2019	Fall 2019	Winter 2019	Spring 2019 (estimated)
Dining Out	\$38.35	\$40.15	\$29.10	\$39.20
Lodging	\$26.73	\$24.50	\$22.38	\$25.68
Shopping	\$26.52	\$26.89	\$27.18	\$26.69
Groceries	\$16.15	\$12.41	\$11.11	\$14.39
Transportation	\$13.14	\$12.18	\$12.06	\$12.69
Entertainment	\$10.48	\$6.82	\$6.05	\$8.76
Recreation	\$6.82	\$2.97	\$3.88	\$5.01
Other	\$3.98	\$4.14	\$0.19	\$4.06
Total	\$142.17	\$130.06	\$111.95	\$136.48

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 the night in the area (table 11). On average, lodging accounts for about \$50 of the difference. Day visitors also report spending less on average on entertainment and dining out.

Table 11: Average Spending per Person per Day by Visitor Type: St. Cloud Visitors

Category	Summer 2019	Fall 2019	Winter 2019	Spring 2019
Day visitors	\$98.18	\$60.64	\$77.36	\$80.54
Overnight visitors	\$190.64	\$174.27	\$157.25	\$182.95
All visitors	\$142.17	\$130.06	\$111.95	\$136.48

The direct effect is then the number of estimated visitors times the average spending per visitor. In summer, this works out to total visitor spending of \$61.9 million (table 12). In fall, it is \$54.2 million, \$48.1 million in winter, and an estimated \$59.0 million in spring. In total, visitors spent \$223.2 million in St. Cloud in 2019.

Table 12: Direct Impact of St. Cloud Visitors, 2019

Category	Summer	Fall	Winter	Spring (estimated)	Total
Day Visitors					
Average spending	\$98.18	\$60.64	\$77.36	\$80.54	
Number of visitors	154,057	266,465	239,355	194,084	
Day spending	\$15,125,937	\$16,159,498	\$18,517,017	\$15,631,589	\$65,434,041
Overnight Visitors					
Average spending	\$190.64	\$174.30	\$157.30	\$182.95	
Number of visitors	245,569	218,017	188,065	237,214	
Overnight spending	\$46,815,230	\$37,994,612	\$29,573,029	\$43,397,856	\$157,780,726
Total visitor spending	\$61,941,167	\$54,154,110	\$48,090,045	\$59,029,445	\$223,214,768

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 summer 2019, visitors to St. Cloud generated an estimated \$87.8 million in economic activity (table 13). This includes \$22.2 million in labor income. Visitors supported employment for 855 workers in the area during the summer months.

Table 13: Total Economic Contribution of St. Cloud Visitors, Summer 2019

Category	Direct	Indirect	Induced	Total
Output (millions)	\$61.9	\$13.4	\$12.5	\$87.8
Employment	645	110	100	855
Labor Income (millions)	\$13.8	\$4.3	\$4.1	\$22.2

In fall 2019, visitors to St. Cloud generated an estimated \$77.8 million in economic activity (table 14). This includes \$20.2 million in labor income. Visitors supported employment for 780 workers in the area during the fall season.

Table 14: 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

In winter 2019, visitors to St. Cloud generated an estimated \$67.8 million in economic activity (table 15). This includes \$17.2 million in labor income. Visitors supported employment for 650 workers in the area during winter.

Table 15: Total Economic Contribution of St. Cloud Visitors, Winter 2019

Category	Direct	Indirect	Induced	Total
Output (millions)	\$48.1	\$10.0	\$9.7	\$67.8
Employment	490	80	80	650
Labor Income (millions)	\$10.8	\$3.2	\$3.2	\$17.2

In spring 2019, visitors to St. Cloud generated an estimated \$84.5 million in economic activity (table 16). This includes \$21.9 million in labor income. Visitors supported employment for 840 workers in the area during spring.

Table 16: Total Economic Contribution of St. Cloud Visitors, Spring 2019

Category	Direct	Indirect	Induced	Total
Output (millions)	\$59.0	\$13.1	\$12.4	\$84.5
Employment	630	110	100	840
Labor Income (millions)	\$13.7	\$4.2	\$4.0	\$21.9

In 2019, St. Cloud visitors generated an estimated \$317.9 million in economic activity (table 17). Visitors supported 3,125 jobs that paid \$81.5 million in labor income.

Table 17: Total Economic Contribution of St. Cloud Visitors, 2019 Summary

Category	Summer	Fall	Winter	Spring (estimated)	Total (estimated)
Output (millions)	\$87.8	\$77.8	\$67.8	\$84.5	\$317.9
Employment	855	780	650	840	3,125
Labor Income (millions)	\$22.2	\$20.2	\$17.2	\$21.9	\$81.5

Overnight visitors drive the most significant share of economic activity (table 18). Of the \$317.9 million total, 72 percent is from overnight visitors.

Table 18: Total Economic Contribution of Visitors by Visitor Type, Summary

Category	Day Visitors	Overnight Visitors	Total
Output (millions)	\$89.7	\$228.1	\$317.9
Employment	835	2,290	3,125
Labor Income (millions)	\$21.5	\$60.0	\$81.5

Tax Effects

The model can also estimate the effect on tax collections. In summer 2019, visitors to St. Cloud generated an estimated \$7.0 million in state and local taxes (table 19). Fall visitors generated \$6.7 million, winter \$5.6 million, and spring \$7.0 million. For the whole year, visitors generated \$26.3 million in state and local taxes. Of this, \$12.7 million were in sales taxes and \$8.6 million in property taxes.

Table 19: Total Economic Contribution of Visitors, State and Local Tax Impacts (millions)

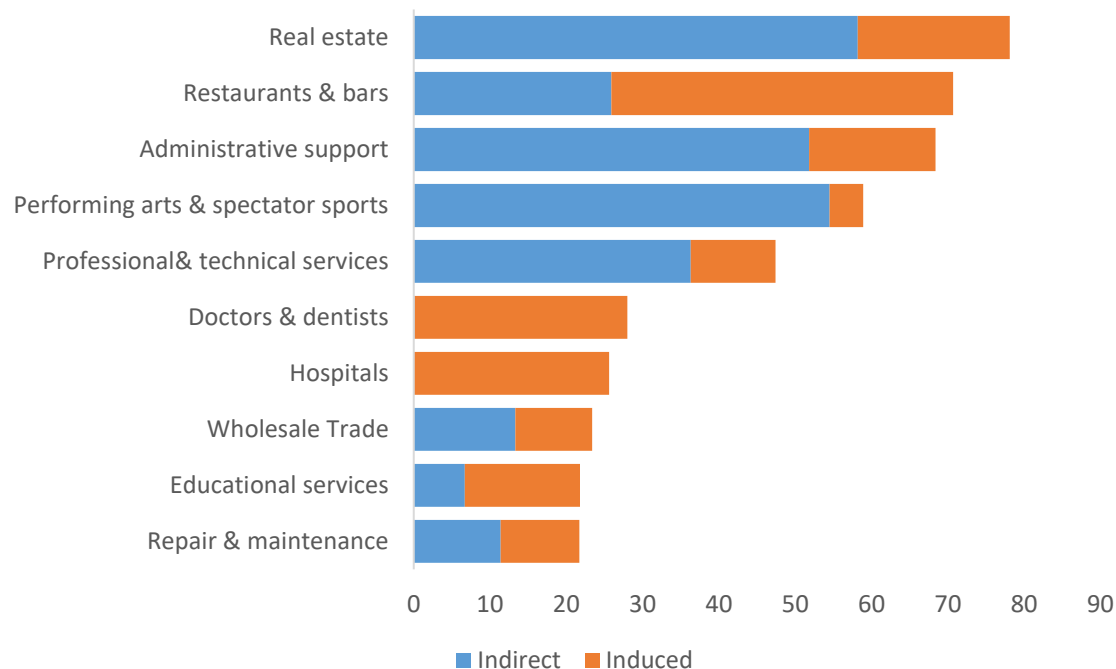
Category	Summer	Fall	Winter	Spring	Total
Sales tax	\$3.4	\$3.2	\$2.7	\$3.4	\$12.7
Property tax	\$2.3	\$2.2	\$1.8	\$2.3	\$8.6
Income tax	\$0.7	\$0.7	\$0.6	\$0.7	\$2.7
Other tax	\$0.6	\$0.6	\$0.5	\$0.6	\$2.3
Total	\$7.0	\$6.7	\$5.6	\$7.0	\$26.3

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 24). 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 of 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 paycheck to dine out, which generating an induced effect.

Figure 24: Visitors to St. Cloud, Top Ten Industries Affected, Indirect and Induced Effects Only, Sorted by Employment



Tourism in the Context of St. Cloud's Economy

In 2019, tourism-related industries employed 10,790 workers in St. Cloud (table 20). Our estimates indicate visitors supported 2,490 of those jobs or approximately 23 percent. However, certain tourism sectors are more dependent on visitors than others. For example, visitors supported 48 percent of accommodation and food service jobs.

Table 20: Tourism Related Employment in Context of Industry, All Seasons

Industry	Tourism-Supported Jobs	Total Jobs	Tourism as a Percent of All Jobs
Retail	490	6,280	8%
Arts & entertainment	410	1,228	34%
Accommodation & food services	1,590	3,282	48%
All Three Industries	2,490	10,790	23%

Total jobs from the QCEW database

Economic Impact of Visitors at RECC and MAC in St. Cloud

St. Cloud has two facilities that draw visitors and are also city-owned. They are the River's Edge Convention Center (RECC) and the Municipal Athletic Complex (MAC). As this study examines the role of tourism in the region, it is helpful to also explore the impact of these facilities.

River's Edge Convention Center

On the visitor survey, respondents selected reasons for their visit to St. Cloud. In order to measure the impact of convention center visitors, Extension pulled the responses from people indicating they were in St. Cloud for a convention or a business trip. On average, these respondents reported spending \$104.98. Major expenditures included lodging, dining out, and shopping (table 21). Given the more limited number of responses, Extension did not break the results out by season or visitor type (day versus overnight).

Table 21: Average Spending per Person per Day by Season: St. Cloud Visitors

Category	All Visitors	Convention & Business Visitors
Dining Out	\$35.87	\$24.62
Lodging	\$24.54	\$43.32
Shopping	\$26.86	\$10.29
Groceries	\$13.23	\$6.73
Transportation	12.46	\$6.94
Entertainment	\$7.78	\$8.34
Recreation	\$4.56	\$1.88
Other	\$2.77	\$2.86
Total	\$128.07	\$104.98

In 2019, the City of St. Cloud estimates 145,667 visitors came to the River's Edge Convention Center (table 22). Spring (March-May) saw the highest number of visitors (53,753) and summer (June-August) recorded the lowest number (18,359). Given average spending of \$104.98 per person, total spending by River's Edge Convention Center visitors was an estimated \$15.3 million in 2019.

Table 22: Direct Impact of St. Cloud Visitors, River's Edge Convention Center, 2019

Category	Summer	Fall	Winter	Spring	Total
Number of visitors	18,359	34,105	39,450	53,753	145,667
Per person spending	\$104.98	\$104.98	\$104.98	\$104.98	
Total visitor spending	\$1,927,480	\$3,580,630	\$4,151,240	\$5,643,440	\$15,302,790

In total, River's Edge Convention Center visitors generated \$22.4 million of economic activity in 2019 (table 23). This includes \$5.8 million in labor income. Visitors to the convention center supported 217 jobs at business other than the convention center.

Table 23: Total Economic Contribution of St. Cloud Visitors, River's Edge Convention Center 2019

Category	Direct	Indirect	Induced	Total
Output (millions)	\$15.3	\$3.8	\$3.3	\$22.4
Employment	160	30	27	217
Labor Income (millions)	\$3.5	\$1.2	\$1.1	\$5.8

There is an important caveat to note here. These figures do not represent the total economic impact of the River's Edge Convention Center, just its visitors. The distinction comes from convention center operations. To measure the total economic impact, one would also need to include spending and employment by the center itself.

In addition, this is a conservative estimate as the visitor counts only include those who were at an event or activity at the convention center. Often, business and convention travelers will bring a spouse or companion on the trip. The spending by those additional people is not accounted for in this analysis, primarily because there was no reliable method for quantifying the number.

Municipal Athletic Complex

In order to measure the impact of municipal athletic complex visitors, Extension pulled spending responses from people indicating they were in St. Cloud for sporting events. On average, these respondents reported spending \$111.28. Major expenditures included lodging, dining out, and shopping (table 24).

Overall, sports visitors also reported spending less than the general visitor population. In comparison, sports visitors spent more per person on lodging. Expenditures for food were lower.

Table 24: Average Spending per Person per Day by Season: St. Cloud Visitors

Category	All Visitors	Sports Visitors
Dining Out	\$35.87	\$27.02
Lodging	\$24.54	\$30.00
Shopping	\$26.86	\$20.42
Groceries	\$13.23	\$8.76
Transportation	12.46	\$11.28
Entertainment	\$7.78	\$8.22
Recreation	\$4.56	\$2.96
Other	\$2.77	\$2.62
Total	\$128.07	\$111.28

In 2019, the City of St. Cloud estimates 44,826 visitors came to the Municipal Athletic Complex (table 25). Winter (December-February) saw the highest number of visitors (15,124). Given average spending of \$111.28 per person, total spending by Municipal Athletic Complex visitors was an estimated \$5.0 million in 2019.

Table 25: Direct Impact of St. Cloud Visitors, Municipal Athletic Complex, 2019

Category	Summer	Fall	Winter	Spring	Total
Number of visitors	8,344	7,020	15,124	14,338	44,826
Per person spending	\$111.28	\$111.28	\$111.28	\$111.28	\$111.28
Total visitor spending	\$928,490	\$781,160	\$1,682,950	\$1,595,490	\$4,988,090

In total, Municipal Athletic Complex visitors generated \$7.1 million of economic activity in 2019 (table 26). This includes \$1.8 million in labor income. Visitors to the complex supported 70 jobs at businesses outside the complex.

Table 26: Total Economic Contribution of St. Cloud Visitors, Municipal Athletic Complex, 2019

Category	Direct	Indirect	Induced	Total
Output (millions)	\$5.0	\$1.1	\$1.0	\$7.1
Employment	50	10	10	70
Labor Income (millions)	\$1.1	\$0.4	\$0.3	\$1.8

Like the convention center, this athletic complex analysis only measures the impact of visitors. Including operations would increase the total economic impact.

DISCUSSION

RESPONDENT DEMOGRAPHICS

Most respondents were 50 years and older and females were more likely to take the survey than males. More local respondents (within a 60-mile radius of the St. Cloud Metro Area) participated in this study due to the proximity to the St. Cloud Metro Area. Most respondents were repeated visitors and the St. Cloud Metro Area was their primary trip destination. Most of them learned about the St. Cloud Metro Area from word of mouth and Google. Most respondents were satisfied with their experience in St. Cloud Metro Area. They would most likely revisit and recommend the area to others.

Findings showed that dining-out was the most popular activity among respondents. The COVID-19 pandemic caused devastating impacts on local hospitality and tourism businesses. Events and conventions were canceled, hotel reservations ceased, and local restaurants were closed.

RESIDENCY AND RESPONDENTS' TRAVELING BEHAVIORS

Respondents' residency is the most powerful predictor for profiling visitors to the St. Cloud Metro Area. Out-of-state and in-state respondents tend to spend more and stay longer in the St. Cloud Metro Area. Respondents' residency also determines their willingness to revisit the area.

The majority of the respondents across three residency groups indicated the St. Cloud Metro Area was their primary destination for their trips. The local respondents, who lived within a 60-mile radius, tended to use the St. Cloud Metro Area as their final destination while the in-state respondents would like to visit other destinations after they stopped by the St. Cloud Metro Area. It could be explained that the non-local respondents would like to visit more places during their trips as the efficiency of the trip was considered for the trip planning.

Local respondents accounted for the major proportions in the several activity categories while comparing to the in-state and out-of-state respondents, dining-out, health/medical treatment, brewery/winery visiting, visiting parks, festivals/events participation, sports events, and shows/music concerts. Some outdoor activities, hiking and kayaking/canoeing, were popular ones among the out-of-state respondents. They also accounted for the major proportion for some activities, including sightseeing, visiting friends and relatives, visiting museums/libraries, and wedding/family reunion. These findings also echoed that visiting family/friends was the most significant reason for visiting the St. Cloud Metro Area for the out-of-state respondents. It also provided the supportive clue that most local respondents stated that AMT and festival/event were the most prevalent reasons for visiting the St. Cloud Metro Area. The activity participation pattern was mostly identical with their self-reported reasons for visiting.

Residency did play a role in understanding why respondents visited the St. Cloud Metro Area. Most local respondents liked to visit the St. Cloud Metro Area due to the special events in festivals or AMT during the summertime whereas most out-of-state respondents indicated they would like to visit their families and relatives. This finding might be a supportive indication that

visiting families and friends and dining-out were the most popular activities but visiting for food and drink was never one of the predominant reasons for visiting. For most in-state respondents, they visited the St. Cloud Metro Area for visiting the campus related to the college admission event, which was a popular reason for visiting across three seasons.

Respondents' residency played an important role in obtaining destination information during their trip to the St Cloud Metro Area. We could see the local respondent tended to use newspapers, word of mouth, radio, and Facebook to learn about the destination information while exploremn.com, tripadvisor.com, and expedia.com served as the major destination information sources for most of the out-of-state respondents. We also can use this special information source pattern to send our destination information to our potential targeted audience in the future.

Based on the aforementioned spending comparisons, the out-of-state respondents were significantly more likely to spend more on the following categories than local and in-state respondents: the total expenditures, restaurants, and travel-related items, than the counterparts, the in-state, and local groups. However, we could not find any significant spending patterns on the lodging services across three residency groups as we assumed that the out-of-state respondents would spend more in this category. It might be explained that most of them would not like to use the local lodging services as they might live with their relatives or friends during their stay in the St. Cloud Metro Area.

ECONOMIC IMPACT

In 2019, St. Cloud visitors generated an estimated \$317.9 million in economic activity. Visitors supported 3,125 jobs that paid \$81.5 million in labor income. 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.

There were an estimated 1.7 million visitors to St. Cloud in 2019. Of these, slightly more than half (51 percent) were overnight visitors. On average, summer visitors spent \$142.17, fall visitors \$130.06, winter visitors \$111.95, and spring visitors \$136.48 per person per day. On average, overnight visitors spent about \$100 per person per day more than day visitors. Lodging accounted for about half that difference, along with lower spending on food and entertainment.

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.

In order to have an annual estimate of economic impact, we calculated an estimated spending profile for spring. The data collected indicate a fairly reasonable range of \$112 in the slower winter season to \$142 in the busier summer season. The hotel occupancy data indicates spring visitation is closely aligned to summer and fall. Therefore, to calculate spring spending, we weighted the average of spring and fall spending by hotel occupancy.

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. In summer 2019, visitors to St. Cloud generated an estimated \$87.8 million in economic activity. This includes \$22.2 million in labor income. Visitors supported employment for 855 workers in the area during the summer months. In fall 2019, visitors to St. Cloud generated an estimated \$77.8 million in economic activity. This includes \$20.2 million in labor income. Visitors supported employment for 780 workers in the area during the fall season. In winter 2020, visitors to St. Cloud generated an estimated \$67.8 million in economic activity. This includes \$17.2 million in labor income. Visitors supported employment for 650 workers in the area during winter. In spring 2019 (based on the estimated result), visitors to St. Cloud generated an estimated \$84.5 million in economic activity. This includes \$21.9 million in labor income. Visitors supported employment for 840 workers in the area during spring.

In 2019, St. Cloud visitors generated an estimated \$317.9 million in economic activity. Visitors supported 3,125 jobs that paid \$81.5 million in labor income. Among all various spendings in the St. Cloud Metro Area, overnight visitors drive the most significant share of economic activity. Of the \$317.9 million total, 72 percent is from overnight visitors.

The model can also estimate the effect on tax collections due to considering the indirect effect. In summer 2019, visitors to St. Cloud generated an estimated \$7.0 million in state and local taxes. Fall visitors generated \$6.7 million, winter \$5.6 million, and spring \$7.0 million. For the whole year, visitors generated \$26.3 million in state and local taxes. Of this, \$12.7 million were in sales taxes and \$8.6 million in property taxes.

As for evaluating specific economic impacts on two city hall properties (Municipal Athletic Complex and River's Edge Convention Center), the results suggested that business and convention visitors reported spending less than the general visitor population. In comparison, convention and business visitors spent more per person on lodging, which is logical given that they are less likely than other travelers to share a room and thus split the costs. Expenditures for food were lower, which might reflect meals served at the meeting or event and thus not being the responsibility of the individual visitor.

RECOMMENDATIONS

Brand the St. Cloud Metro Area:

The destination branding strategy has been utilized for more than two decades to increase the visitation frequency. Branding the St. Cloud Metro Area would increase our advantage in a highly competitive market and differentiate other cities in Minnesota, which was one of the business strategies proposed by Peter Ducker about creating a unique advantage in the competitive market. The branding efforts would make us different from our competitors and link the symbolic meaning to our area in addition to the current convention, tournament, shopping, and dining functions of the St. Cloud Metro Area.

The brand equity, derived from the branding efforts, would endow the value to the St. Cloud Metro Area when our potential visitors consider their travel destination. We will attract more visitors if our destination brand equity is higher than other cities in the future. Therefore, we need to seriously consider the place branding when we are strategizing the efforts to increase our visitation levels in the next five to ten years.

Market St. Cloud as a hub for events and sports tournaments:

Based on the findings of the survey, most people visited the St. Cloud Metro Area for conventions, special events, exhibitions, and sports tournaments. Market efforts should focus on Central Minnesota and parts of the Twin Cities, within the 60-mile radius of the St. Cloud Metro Area. Proactively contacting associations to host events/conventions/exhibitions in the St. Cloud Metro Area would increase event activity in the area.

Partner with airlines & St. Cloud Regional Airport Advisory Board to increase accessibility to the St. Cloud Metro Area:

Survey feedback indicated that visitors enjoy the convenience and ease of parking of the St. Cloud Regional Airport. Feedback also included offering more flight options, increasing food options within the airport, and keeping free parking. Working closely with the airlines and the St. Cloud Regional Airport Advisory Board to review and improve airport operations and accessibility is important to increase the accessibility to the St. Cloud Metro Area.

Collaborate with the City of St. Cloud Public Works Street Division and City of St. Cloud Planning and Zoning to improve road conditions and accessibility:

Survey feedback indicated visitors' frustration with St. Cloud area road conditions and congestion. It is suggested to work with the City of St. Cloud Public Works Street Division to focus on needed road maintenance as well as to work with city transportation planners to determine how to improve traffic flow. These necessary improvements will increase road accessibility to and in the St. Cloud area.

Promote the St. Cloud Metro Area as a food tourism hub:

Dining out is the most popular activity when visiting the St. Cloud Metro Area. It is suggested to diversify and increase dining options in the St. Cloud Metro Area. Food trucks and microbrew pubs would serve as potential attractions for visitors after the COVID-19 pandemic.

Promote the St. Cloud Metro Area as a destination for medical treatment:

Survey findings indicate that some people visit the area for medical treatment. Working closely with CentraCare and other health care providers in the area would provide the opportunity to promote the St. Cloud area as a medical hub for patients in Central Minnesota and parts of Twin Cities.

Conduct further research:

This study should be completed every five years to determine trends over time. Full support from local businesses and agencies is needed before surveying and it could avoid some sampling issues like the overrepresentation and underrepresentation issues. For example, researchers did not have the opportunity to actively approach Crossroads Mall visitors and customers who used the airport shuttle between St. Cloud and Minneapolis Airport.

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 of 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 traveling 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 soon? ____
 (Please rate your likelihood level from **5 <most 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 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.

REFERENCES

Explore Minnesota. (2017). 2017 Tourism and the economy fact sheet: Featuring 2015 state sales tax and job data. Available from: <http://www.exploreminnesota.com/industry-minnesota/research-reports/researchdetails/?nid=135>

Perera, P., Vlosky, R. P., & Wahala, S. B. (2012). Motivational and behavioral profiling of visitors to forest-based recreational destinations in Sri Lanka. *Asia Pacific Journal of Tourism Research*, 17(4), 451-467.

University of Minnesota Tourism Center (2016). *Itasca Area visitor profile: 2014 final report*. St. Paul, MN: University of Minnesota Tourism Center.