MINNESOTA SEA GRANT PROGRAM

RESEARCH REPORT NO. 7
THE NORTH SHORE'S TRAVEL/TOURISM
INDUSTRY AND ITS MARKET SEGMENTS

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THE NORTH SHORE'S TRAVEL/TOURISM INDUSTRY AND ITS MARKET SEGMENTS

SUMMARY

In 1981 there were more than 1.4 million tourist trips to the North Shore. Tourists spent over $24 million. This amounted to 35 percent of the retail goods and service sector. Tourism is a major economic factor in Lake, Cook, and St. Louis Counties.

Tourists come because of the outstanding visual amenities of the North Shore's natural features: the largest fresh-water body in the world, plunging escarpments, sparkling waterfalls, billion-year-old lava flows, and semiboreal forests. Despite a century of development, there is still a predominant natural, even wilderness image. Many tourists come for specific activities. A growing number are attracted by the dependable snow cover for downhill and cross-country skiing.

Minnesota residents are by far the largest user group. Many of these come from Duluth or other nearby areas. The North Shore is important to these citizens as an accessible area. But since most do not stay overnight, their economic contribution to North Shore tourism is relatively small. Minneapolis-St. Paul residents are numerically the most important and by far the most significant in terms of dollars. The North Shore also attracts tourists in distant markets, including Atlantic and Pacific coastal states.

Nineteen communities provide tourist services throughout the 150-mile length of the North Shore. In addition to the specialized hospitality firms, all retail businesses of these communities make sales to tourists. Lodging services include 111 private lodging businesses (motels, resorts, and condos) having available 1,329 cabins and rooms. Ten of these have campgrounds plus another 10 private, free-standing campgrounds. Five state parks also offer camping along with two municipal campgrounds. There are also almost 900 private, second homes.

The North Shore tourism industry reflects the dynamics of the U.S. economy throughout almost a century. Its most rapid growth came with transportation technology--the family automobile. This growth occurred in the late 1920s, 1930s, and again in the 1945-60 period. It was slowed by other developments: spreading affluence, jet aircraft, and international tourism competition. Now after two decades of readjustment, there are distinct signs of dynamic resurgence in the North Shore's tourism. Some geographic segments have been able to capture sizable winter business. New attractions, things to see and do, and lodging facilities have been added. Not all share in improved returns, but potential for market growth has been demonstrated.

THE NORTH SHORE'S TRAVEL/TOURISM INDUSTRY AND ITS MARKET SEGMENTS

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I. INTRODUCTION

The 150-mile segment of Lake Superior shoreline, from the Lester River at Duluth to the Canadian border formed by the Pigeon River, has been acclaimed as one of the most beautiful drives in the United States. Its rugged appeal attracts nearly one and one-half million tourists each year.

This report provides the first fully comprehensive analysis of the North Shore's travel/tourism industry. It provides information useful in developing this industry, and should in particular prove useful to:

> Managers of resorts, motels, restaurants, automobile services, and related businesses in the study of their specific market opportunities and how best to take advantage of these opportunities;

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Groups, associations and chambers of commerce interested in promotional efforts;

City and county governmental officials in reviewing the need for public investment/developmental efforts;

State and federal agencies in resource management.

Major objectives of this report include the following, to:

Define the scale of the North Shore's tourism industry in the context of the overall local economy:

Delineate the major market segments: where do tourists come from; what, specifically, attracts them; what services do they use?

Review the resources, natural and man-made, of the North Shore as a tourist destination area;

Chart some of the positive syntheses now underway and additional ones that may be feasible in meshing market segments with the area's tourism resources.

The North Shore, for purposes of this report, is defined as the strip of land 5- to 10-miles wide along the 150-mile Lake Superior shore. It extends through approximately eight miles of St. Louis County and the entire shore lengths of Lake and Cook Counties.

Except for tourism, the economy of these counties and of the North Shore itself, has been almost completely dependent upon primary industries. These industries, unfortunately, are subject to severe cycles of boom and bust due to natural, technological, and economic causes:

Iron mining has waxed and wained during numerous periods. Many shore communities are involved in shipping and taconite processing. This economic generator is currently (1983) severely depressed due to the combination of economic recession, energy difficulties, and competition from other producing regions.

Timber production, wood processing, and related activities demonstrate potential for steady production. These are, unfortunately, also subject to interregional competition and wide-spread economic recession.

Agriculture has had a role in the area's economy, but the area is at great disadvantage in production compared to other areas having more favorable soils, climate, and market location.

Commercial fishing has always been a part of the North Shore economy. It declined sharply in importance several decades ago when whitefish and lake trout numbers diminished in Lake Superior. Now, with better control of the lamprey eel, it may show resurgence and may also contribute to tourism.

Tourism has been an economic factor throughout the entire twentieth century. It was already well developed in the 1930s and compared to other industries it has been stable. While reliable data on trends over time are lacking, recent growth has been unspectacular and it is probable that growth in real terms (with inflation effects removed) since 1960 has been slow. 7,13/

At over $24 million annual sales, tourism is now a major economic generator for the North Shore. It is the largest factor in Cook County's economy. Management of this industry is important not only because of its present scale but also because it has potential for substantially more growth as well as continued stability. Like other economic activities, tourism generates jobs, profits, rents, and tax base. While this report concentrates upon tourism, it is essential that North Shore communities pursue all other viable economic industries with equal vigor since a balanced, diversified economy is desirable.9/

This comprehensive study of the North Shore's tourism represents only part of the insights needed to help develop an ongoing, dynamic pattern of tourism industry growth. A companion study, by coauthor Tim Knopp, Research Report No. 8, entitled "The North Shore Recreational Experience," focuses on quality dimensions of the individual's tourism experience.

This report raises a number of questions crucial to North Shore tourism:

How can tourism demands in Midwestern states be best appealed to?

The North Shore's market appeal comes from its outstanding visual amenities. How are these qualities best maintained?

Many existing North Shore tourism operations are managed by people having other income sources. Do these ownership patterns seriously distract and dilute the abilities of these operators to manage the industry so that the North Shore area is competitive with other tourism destinations?

The North Shore's tourism industry is highly seasonal, sharing a difficulty with many other tourism destination areas. Can this seasonal use pattern be reduced?

These and other industry marketing and development problems have potential for creative, constructive syntheses. This report makes information available that can be used for these purposes.

The user of this report is advised to be aware of common misunderstandings that exist regarding the tourism industry. These difficulties arise for a number of reasons: 1) tourism is complex, cutting across a wide expanse of society's social and economic fabric; 2) no one business type, as defined by the United States Department of Commerce in its Standard Industrial Classification, describes tourism completely. Rather, it consists of varying proportions of almost all types of businesses that sell goods and service at retail; 3) the public commonly restricts tourism to those who are recreating and who have traveled from a great distance. It is true that most North Shore tourists are there for recreation. But travel purpose and distance traveled are only two factors of many involved in tourism. The important fact is that these individuals have been attracted to travel to the North Shore; the community now has the opportunity to serve them, thereby generating community income.

Because of these and related problems, much tourism research falls short of capturing the full scope and dynamics of the phenomenon. To achieve a more manageable project, many tourism research efforts simply cut down the range of study. The results often are 1) data about limited specific segments which are then defined as tourism and thus miss the full scale, and 2) limited data about many segments which yields confusion since the data cannot be related well to the full picture.

This research attempts to measure the full range of all travelers to the North Shore. It does this by means of an integrated set of studies. The full travel/tourism picture is then produced using data of all vehicular travel and all lodging use. This data of all travelers is then divided into various segments. Users can thus choose and use data from those segments that are most relevant to their purposes.

DEFINITIONS

<u>Tourist</u> - Any person away from his usual place of work or habitation. Travel is involved; it may be for any time period and/or for any purpose. In this study only two kinds of travelers were not included as tourists: residents of the North Shore (even when in a part of the North Shore not their home); and those who regularly commute to work on the North Shore. Thus, all persons on the North Shore who were not residents or commuters are considered tourists.

<u>Tourism Industry</u> - The economic activity generated by money spent by tourists. Nearly all businesses offering goods and services at retail make sales to tourists, since people away from home buy nearly everything they might buy at home but in very different

proportions. Thus, a wide spectrum of business types sell to the tourist industry. The important point from the view of the North Shore's economy is that tourism generates jobs, profits, rents, and tax bases, just as other viable industries do.

Tourism Plant - The actual facilities that service tourists' needs.

Hospitality; Hospitality Industry - Those operations making it possible for people to travel and sustain themselves away from home. In the strictest sense, hospitality firms provide food, lodging, and transportation services. These are also part of the tourism industry, but the latter includes a wider array of firm types.

North Shore - This is the part of Minnesota bordering Lake Superior. For purposes of this study, it includes an approximately 5- to 10-mile wide strip extending from the Lester River on the northeast edge of Duluth to the Canadian border at the Pigeon River.

Market Segment - Any group of North Shore tourists having a definable, common characteristic, especially a characteristic that can be effectively managed in providing market information or tourism/hospitality services. The characteristic may have to do with activity or service preferences, demographic differences, or socioeconomic classes.

Person-Trip - Counts every person one time for each trip away from home to the North Shore. A family of four making one trip to the North Shore would be counted as four person-trips. If the same family made three separate trips, they would be recorded as 12 person-trips (3 trips x 4 people). Most of the tourist data in this study is in terms of person-trips.

Person-Day - Counts each person one time for each day or part of a day on the North Shore. An overnight trip counts as two person-days. This statistic indicates the density or "tourist population" during any given period.

Vehicle-Trip; Party-Trip - Counts each vehicle one time for every separate trip away from home to the North Shore. Note that vehicle-trips times number of occupants determines person-trips. A party-trip and a vehicle-trip are treated as synonymous since most parties come in one vehicle. Sometimes more than one party travels in a single vehicle; in other cases, one party reported traveling in two or more vehicles.

Vicinity - A residential location classification consisting of North Shore tourists living within 50 miles of the North Shore.

II. METHODOLOGY

The research upon which this report is based consists of an integrated series of studies conducted over a full year. Two comprehensive data sets were used to make the data from all separate studies compatible. These two comprehensive sets were 1) total traffic flow, and 2) the total overnight lodging of the North Shore, including second homes and campgrounds.

Total traffic flow was estimated monthly as exiting vehicles, using data from the Minnesota Department of Transportation permanent counters on U.S. Highway 61 at the St. Louis/Lake County line (plus addition for the parallel scenic highway) and at Finland on Minnesota Highway 1. These counters provide data for every hour of every day, hence providing considerable detail. Monthly data of the traffic exiting the North Shore at the Pigeon River was provided by Statistics Canada. Traffic at other exiting points in St. Louis and Lake Counties was not included as part of the data since they mainly carried vehicles from North Shore residents. Their omission causes a small understatement in the tourist traffic estimates to the extent that these routes carry tourists as defined in this project.

Traffic was classified into: North Shore residents, vicinity residents (within 50 miles), other Minnesota, Canadian and other states. Data collection methods: 1) origin-destination procedures in which traffic was stopped and occupants interviewed on three summer days at Lester River (this operation was supervised by the Minnesota Department of Transportation); 2) interviews of traffic at selected filling stations; 3) moving traffic classifications by state of origin and vehicle types at all exit points throughout the entire year (this activity included 48 different observation periods for a total of 185 hours); 4) traffic classifications provided by Statistics Canada for all vehicles entering Canada; 5) lodging user data provided home location data by seasons for this market segment.

The traffic estimates were conservative since passengers of buses and crews of all heavy trucks and buses were not counted as tourists (these were classed as resident vehicles). However, the lodging data partly corrected for this factor since bus passengers were included among the parties registered.

Total lodging was estimated by conducting a complete census of all North Shore facilities, including campgrounds. This effort updated and extended the detail of information already available from the North Shore Association and Minnesota Sea Grant Extension. Data obtained by interviews with selected private facility operators was used to estimate seasonal occupancies. Detailed public campground statistics were provided by the Department of Natural Resources for the five campgrounds they operate and by two municipal campgrounds. Total room-nights and campsite-nights rented by season were estimated for the entire North Shore and each of seven segments.

Basic data for second homes and recreational properties was obtained from Lake and Cook Counties. All property in geographic townships within five miles of Lake Superior was considered as North Shore-related. More detail is provided in the section on second homes.

Information about tourist characteristics, behavior, and expenditures was obtained by questionnaires directly from 1,328 tourist parties that included about 3,300 individual tourists. Four different questionnaires were designed and used for gathering this information:

> Travelers exiting the North Shore at Lester River were stopped and interviewed on three different days. In addition, travelers stopping at filling stations from Two Harbors to Grand Marais were interviewed on 17 randomly selected days. This process extended from June through September, 1981. This period includes an estimated 57 percent of the 1981 North Shore's tourist traffic from beyond 50 miles. These interviews were designed to gather basic information and lasted three to five minutes.
>
> Those contacted in the above interviews, who were identified as tourists and who had had a significant experience on the North Shore, were given a detailed questionnaire to complete and return by mail.
>
> A randomly drawn sample of patrons at eight lodging facilities were mailed a ten-page questionnaire.
>
> A randomly drawn sample of those owning recreational and/or second home property were interviewed via telephone.

Each of the above data parts was proportionately weighted for the market segments represented and tabulated.

An Explanation of the Data Provided

The user will observe that there are two basic kinds of data displayed in the tables (see appendix):

1. Estimates of total tourism, by selected segments (Tables 3 through 11).

2. Data about given segments and their characteristics, e.g. summer tourists only, users of Cook County public lodging facilities, and second home owners (Tables 13 through 51).

Tables 1, 2, 12, and 51 provide further North Shore tourism insights.

The estimates of total tourism are composite estimates drawing upon all available sources of information. As an illustration, an estimate of total tourist expenditures was made based upon total traffic flow and summer and fall tourist questionnaire responses. A second estimate was then made based on the census of all lodging establishments and questionnaire responses from a random sampling of Cook County public lodging facility users. These two initial estimates had a discrepancy of less than 10 percent. This close correspondence, using two different data procedures, gives considerable credence to the general accuracy of the dollar estimate.

The final estimate was developed from close study of the two basic data sets plus the addition of tax payments by tourist owners of second homes. This latter would not have appeared in any of the other data sources.

Tables for summer tourists and estimates of all tourists include data in terms of vehicle-trips, person-trips, and person-days. These are provided since each form of data yields different insights. However, it does require that users be fully aware of the type of data displayed when consulting the tables.

Summer tourists account for about one-half of the total of tourist person-days and tourists' expenditures. A number of tables give characteristics of the summer tourist segment separately. Selected characteristics are shown for users of Cook County public lodging services. Lodging guests are one of the most significant tourist segments since they spend more than those not staying overnight and make wider use of other North Shore tourism facilities. With two important exceptions, the Cook County group probably represents all lodging guests on the North Shore reasonably well. They have a different winter pattern (due to the Lutsen-Tofte shore segment) and there is a higher proportion of Canadians (due to the Grand Portage shore segment). In the case of both summer tourists and Cook County lodging tourists, it was felt that the separate data displays would provide useful information for certain readers.

A close correspondence of the several data sets to each other may be observed in several places. Data of second home users and owners is presented in overall estimates, the summer tourist data, and specialized second home tabulations. Tables for summer tourists show slightly higher numbers of second home users than do the specialized tables, but still correspond closely. (Apparently some summer visitors who rented second homes or stayed with friends in second homes indicated second homes as their lodging means.) In Table 13, socioeconomic characteristics of summer and lodging tourists are shown separately and will be observed in close agreement.

Finally, only that data judged to be of greatest overall value could be displayed in this report. A much greater volume, in much greater detail is available through the authors.

III. FINDINGS

A. THE IMPACT OF TOURISM

In 1981 there were 1.36 million tourist person-trips to the North Shore. The real drama of this can be illustrated by using summer season data; 40 per cent (554,000) of these person-trips were made at that time. On the average, each stay was 2.5 days (this includes 53 percent who were not there overnight). Thus, there were 1.37 million tourist person-days on the North Shore during June, July, and August. The average daily number of tourists on the shore during the season was about 15,000. This an average daily summer density of 100 tourists per mile.

The 1.36 million North Shore tourists were there for a total of 2.62 million person-days. They spent $24.5 million on the North Shore. This income amounts to 35 percent of the total retail and selected services sales on the North Shore of $69.6 million.[22/] The economic impact upon the local economies is substantial.

More than just retail and selected services sectors receive income from tourism. One of the largest other tourist incomes is generated from the real estate tax on second homes owned by nonresidents. Others include construction labor employed on second homes, and legal and medical services. When all of these are deducted from the $24.5 million, an estimated $23 million (or 33 percent) of all retail and selected services sales are generated by tourists' spendings.

Less than one-third of the $24.5 million goes to business types that serve tourists only. These are the lodging businesses: hotels, motels, resorts, and campgrounds. All of the rest, estimated at $17 million, goes to businesses that serve the resident population as well as tourists: grocery stores, restaurants, auto services, other retail stores, recreational services, and the local government. This expenditure helps to generate local jobs and income through these businesses; and, by making them more profitable, they can provide better services to area residents.

Throughout the year, 58 percent of all vehicles leaving the North Shore are tourist vehicles (Table 2). This varies from a high of 64 percent in summer to a low of 52 percent in winter. Tourist traffic fluctuates more widely seasonally than residential travel. Tourists are a major factor in highway use on the North Shore. This factor will be examined in greater detail in later sections.

As is well known, the major tourist impact occurs in summer. About one-half of both the tourist person-days and their dollar spending occurs in the three summer months of June, July, and August. In the winter months (December, January, and February) both drop to about one-fourth the summer level (Tables 9 and 10). Seasonality will be treated further throughout following sections. It poses a challenge to tourism as a primary North Shore income producer.

B. THE NORTH SHORE'S TOURISM PLANT

This section treats the North Shore's tourism plant as an essential factor in understanding and managing markets. It discusses the question, "What does or can this destination area deliver to tourists?" The treatment is of a descriptive nature and thus contains many subjective observations. The only quantitative analysis is of lodging facilities. Other types of facilities--food, transportation, and recreational services--also play major roles but must be analyzed in follow-up efforts. Natural resources, especially visual amenities, are noted as essential but are not treated here in detail. A companion report, "The North Shore Recreational Experience" (Sea Grant Research Report No. 8), furthers these needed analyses. Development of an optimum tourism industry consists of systematic management of resources and markets to achieve the full potential from each.

Resources

An overall approach includes review of resources available to the tourist industry.

Natural Resources - consist of Lake Superior, its land-water interface at the shore, the billion-year-old lava flows, rocky escarpment, semiboreal vegetation, climate, and wildlife. Aesthetic qualities of these features are their key contribution to tourism.

Human Resources - include a range in human talents from Duluth suburbanites, foresters, fishermen, mining employees, and residents of the Grand Portage Indian Reservation, to many individuals who choose to live and work on the North Shore.

Man-made Resources - include the Grand Portage Trail and Great Lakes shipping. Included are three counties and 19 communities, ranging in size from fewer than 100 inhabitants to populations like Two Harbors of 4,400. Their formal governments, as well as their many faceted social and informal organizations, are included. Private facilities, such as hospitality businesses, and government facilities, such as parks, are also part of the man-made resources.

State Agencies - the Minnesota Tourism Division, Arrowhead Planning Division, Minnesota Department of Transportation, Minnesota Department of Natural Resources, and the University of Minnesota Extension Services.

Federal Agencies - the U.S. Forest Service, U.S. Army Corps of Engineers, U.S. Department of Interior, and the U.S. Travel Service.

Tourism Industry Components

Almost every element of the North Shore impacts upon tourism. For purposes of management however, those that make up the specific tourism industry can be viewed as a set of interrelated features, facilities, and services. They are highlighted here briefly. Lodging is discussed in more detail below.

Attractions - are those elements that induce tourists to travel to a given destination. The outstanding northwoods and waters, visual qualities, and overall ambience were found to be the greatest attractors to the North Shore.

Consideration of North Shore travel attractions should include the outstanding array of national-level attractors in northeastern Minnesota. Among them:

* The North Shore; Lake Superior
* Duluth - one of the most picturesquely sited, most visually accessible cities in the world.
* Boundary Waters Canoe Area Wilderness (BWCA) - offering a unique experience with nationwide appeal
* Voyageur's National Park (VNP) - the only water-based national park in the U.S.
* Grand Portage National Monument - along with the BWCA and VNP, it interprets the Voyageur Era.
* Canadian Border - many tourists are "lost" into Canada, but access to the international border generates travel, making direct personal contact possible with travelers who would not otherwise be in the area.
* Mesabi Iron Range - its importance is recognized nationally but it is currently undersold to tourists.
* North Woods/Rocks/Waters - The general boreal ambience.

All of these are attractor assets, drawing people to northeastern Minnesota and making it possible to generate tourism income in serving them.

Hospitality Services and the Tourist Sales Package - include those services and goods sold to tourists. While tourists buy from almost all businesses selling at retail, there are certain ones--lodging, food, transportation, activities/entertainment, and sporting and souvenir supplies--that perform essential roles in the tourism industry. For tourists, these are necessary to live, travel, and access the special experiences of the North Shore. For North Shore communities, these services are major means of generating income from tourists. In other words, the North Shore does not benefit economically from tourists until someone sells them something. All parties have a stake in the development of an adequate sales package.6/

Activities; Things to See and Do - these add detail and depth to the North Shore experience. Some of these are special to the North Shore: access to a pebble beach, deep sea fishing rentals/charters, a light house tour, scenic overlooks, and historical interpretation in many forms. Others are available in many places but have a special appeal in the North Shore setting: hiking, camping, nature observation, photography, cross-country skiing, down-hill skiing, snowmobiling, bicycling, evening entertainment, and North Shore offerings. These play a major role in tourists' length of stay, and hence the opportunity to generate income (Tables 20, 33, and 47).

The Information/Interpretation/Direction System - provides an essential form of access to attractions, services, and activities. This is a necessary part of the marketing system. It involves brochures and advertising and includes every North Shore retail business, each employee, and information packaging for each attraction and activity. Travelers need information for more informed decision making. (Reported use of information by tourists is partly shown in Tables 35 and 36. See also, Slide-Tape 277, An Information/Direction/Interpretation System for Minnesota Counties available from the Agricultural Extension Service, University of Minnesota).10/

The Transportation System - provides the travel linkage beween the North Shore and its several geographic market areas. The highway also serves as a primary part of the tourism experience since many tourists treat the North Shore as a linear sightseeing area. U.S. Highway 61 serves as the main local travel artery. Highways to collection points, especially Duluth, also perform a needed role. Currently, private motor vehicles provide most access, but they set limits since other transportation means are growing faster. Charter buses are already employed on the North Shore and can be exploited to a greater extent.

Air travel, which is rapidly expanding, is barely used at all, which particularly limits access to distant markets. Water transportation is also at a token level, yet it might be a means of providing the most unique Lake Superior/North Shore experience.

Lodging Services

North Shore lodging facilities (Table 12), a part of hospitality services, are accorded special treatment here for a number of reasons:

1. The research procedure required a comprehensive measure of lodging operations and information from their customers, especially during the non-peak travel season from October through May.

2. Those staying overnight in public lodging facilities were most important in terms of the North Shore tourism industry, accounting for an estimated 63 percent of tourists' spending. (Tourists spending the other 37 percent included those not staying overnight, second home owners, and those staying with friends and relatives.)

3. Lodging facilities have been found to be a major factor in assessing outdoor recreational areas.7/

4. Lodging operations are the only hospitality type that is almost 100 percent a part of the tourism industry.

Despite the above, the reader should not consider lodging operations as <u>the</u> tourist industry. On the North Shore, tourists spend only 25 to 30 percent of their outlay for lodging. In populous areas, much less is spent, amounting to only 9 percent in the Minneapolis-St. Paul metropolitan area.8/ Further, 62 percent of the tourist person-trips to the North Shore were day trips, not overnight.

As an added consideration, summer tourists spent more on food than on lodging (Table 28). Food purchases by tourists generally amount to 30 per cent of all restaurant sales. 6/ Important as lodging is, over concentration upon it can produce serious distortions; the area's objective should be to offer a balanced set of tourism facilities.

The North Shore offers 128 overnight facilities to tourists. There are 111 resorts, motels, and condominimums, and 27 campgrounds. Ten of these offer both campsites and/or rooms and cabins. Offered for rent are 618 cabins or condominiums, 711 rooms, and 1,065 campsites. Currently condominium facilities are offered for rent by only three operations, but other condominium sites are under construction. Campgrounds consist of 10 commercial operations offering only campsites, 10 operations that offer both, 5 state parks with campsites and 2 municipal campgrounds. Two other forms of overnight lodging are staying with friends and relatives and second homes.

North Shore overnight lodging operations are small, averaging only 12 cabins or rooms and/or 40 campsites per operator. Most are single-family proprietorships with a high proportion treating the business as part-time (one or both of the adult family members work at other jobs), as a semiretirement activity, or as a hobby operation. These lodging industry characteristics are not unique to the North Shore. They are held in common with most other non-metropolitan areas of Minnesota and other outstate parts of the Upper Great Lakes region.

While lodging facilities of this scale are the rule in the rural Upper Great Lakes region, they are in sharp contrast to the types of facilities in newly evolving tourist destinations throughout the world. North Shore lodging facilities offer an excellent, often personalized service. This is indicated in attitudes of summer tourists. Fifty percent said that they were "very satisfied" with their lodging (Tables 30 - 33). Another 38 per cent said they were "satisfied" for a total of 88 percent satisfied users.

Smaller dispersed operations have another major advantage. They do not intrude unnecessarily upon the natural setting. Thus, although there is nearly one lodging facility per mile of North Shore, the visitor receives the general impression of a vast wilderness area. It is to the credit of development to date that this highly prized "nature" experience is yet possible. It is achieved through small scale, off-road siting and clustering of facilities.

There are unfavorable consequences of small scale hospitality businesses. They are, in the first place, small because that was the prevailing style in the 1930-1960 period when most were developed. Many of these operations could then support a family, but cost-return patterns and family consumption needs have been so altered that this is no longer true for most of them. Further, unlike some business types, such as farms, most cannot be combined to make larger units. Hence, they remain small and are either liquidated, become second homes, or become part-time or hobby operations. Part-time owners/managers are often unable to devote the attention and energy needed to manage the business and their markets.

It is necessary to devote time to marketing the entire destination area, working in cooperation with others on the North Shore. As costs escalate and markets fail to improve, the market view of many of these operators may become narrowly oriented. It is possible to see the market as zero-sum; what a neighboring operation gets is their loss. The market threat becomes the resort down the road, and sight is lost of the position of their North Shore destination in global competition with other tourist destinations.13/ The most serious consequence is that an unnecessary amount of energy is often wasted in local competitive strife rather than channeling it into cooperative marketing and development of the area.

Dynamics of the North Shore Tourism Industry

A dynamic pattern is emerging from the North Shore's tourism industry and the analysis of current market segments. U.S. recreating demand weaves together with the spectacular natural features of the North Shore and with its services into a rich and complex tapestry. It varies sharply over time and evolves as changes occur in 1) U.S. economic, social, and psychographic characteristics, and 2) in patterns of North Shore management and those of alternative destinations.

Highlights of this dynamic pattern are traced here:

Early Auto Tourism Expansion - The first large-scale expansion in North Shore tourism came with the growth of automobile travel in the 1920s and especially in the 1930s. This era saw the first mass U.S. tourism. It set the pattern for development of facilities that still dominates: relatively small, family owned proprietorships. One significant attempt to break out of this pattern occurred in the late 1920s with the opening of Naniboujou Resort. It was to be an exclusive resort and claimed association with major sports-associated individuals, including Babe Ruth and Grantland Rice. The 1929 stock market crash prevented the resort from reaching hoped-for growth dimensions. There had been tourism based on elite steamboat transportation preceding 1920. Despite growth of tourism in the 1930s, U.S. Highway 61 was paved only to Two Harbors; by 1940, there was a hard surface to the Brule River. Beyond, the road was graveled.21/

Post War Expansion - In the period from 1946-1960, the use pattern that had begun in the 1920s continued. Family automobile travel grew, second homes were developed, new family-owned and operated resorts were established. Around 1960, resort numbers were at a peak.

Obsolescence - The pattern that had worked so well for 40 years faltered during the 1960-1980 period. The number of resorts fell by one-half on the North Shore.7,13/ This was not the fault of managers. It was the price paid for early prominence as a vacationing destination and for the dynamic nature of the U.S. economy. The need to readapt was clear. Among the factors operating to the disadvantage of the North Shore were:

major new investments in tourism destinations worldwide, artificial airconditioning, creation of artificial lakes on a relatively large scale, energy limitations, expansion of air travel, and new marketing methods such as package tours.

The Present; The Future - The North Shore's tourism industry now appears to be one of the brightest spots in Minnesota's tourism industry. Among the contributing factors: emergence of a number of highly capable managers who are demonstrating that profitable operation of hospitality businesses is attainable; growth in winter recreation has occurred, and new facilities are under expansion (the area has some of the most dependable snow weather east of the Rocky Mountains); growth of interest in the environment, nature, wilderness, and history on the part of the recreating public; great expansion of interest in camping in many forms supported by developments in camping equipment; developments in use of condominiums as means of recreational lodging; recognition and development of tourism resources by North Shore municipalities; and renewed efforts in providing tourism information to travelers. All of these have potential for a salutory affect upon the North Shore's tourism industry in the 1980s.

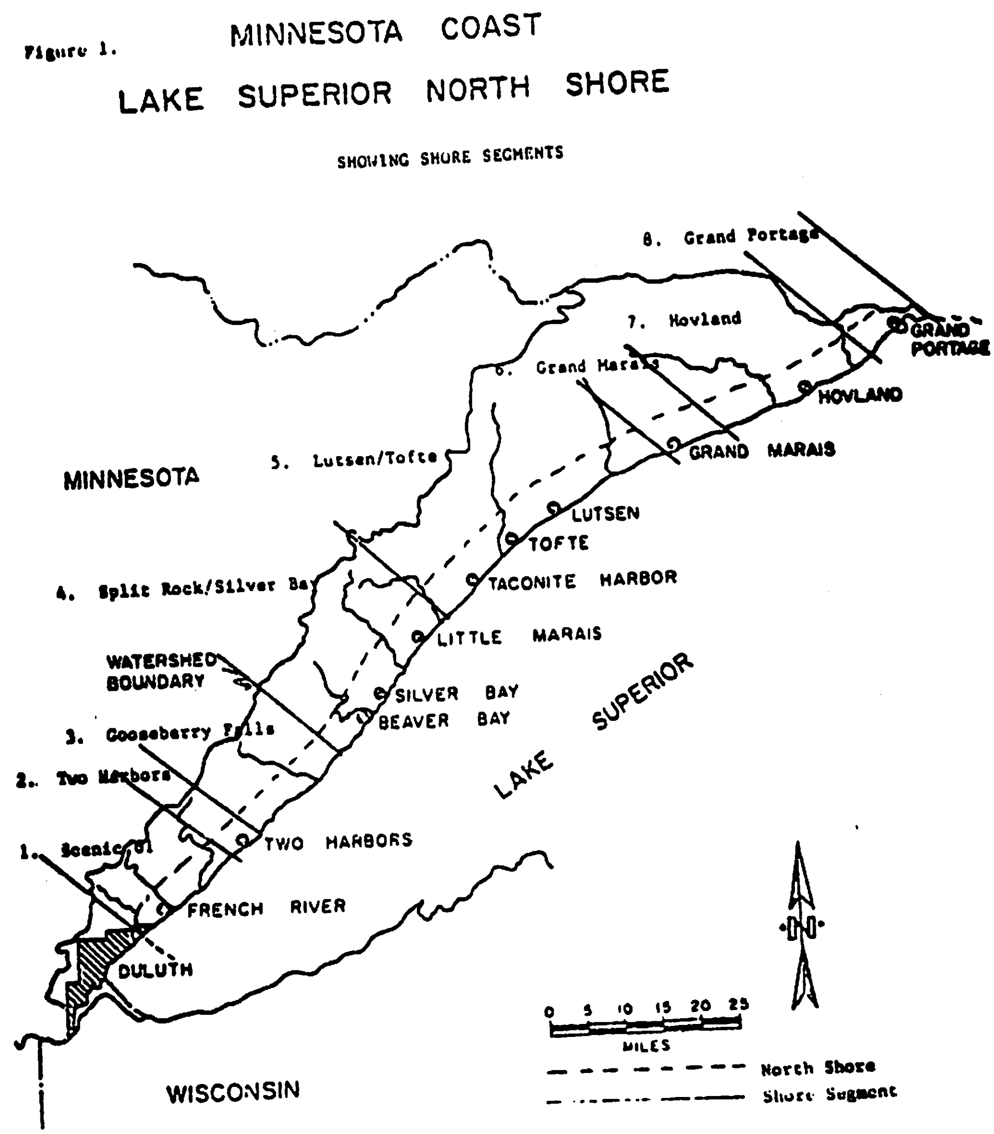
C. HIGHLIGHTS OF NORTH SHORE MARKET GEOGRAPHIC SEGMENTS

This is a brief overview of the geographic segments of the North Shore, highlighting their natural and man-made tourism attributes. The segments are indicated in Figure 1. Divisions are based on geography, natural features, and the nature of hospitality services. The description notes only salient factors; a much more analytic treatment is needed to help guide private and public investments and developments in the tourism industry.

Segment 1--Scenic 61 (Lester River to Two Harbors)
This is the 23-mile segment of County 61 (old U.S. Highway 61), from the Lester River to Two Harbors. It is indeed scenic, providing excellent vistas of Lake Superior. It has at least 18 waysides that offer opportunity to stop, picnic, and enjoy the view. It is also a suburban Duluth strip development, consisting of concentrations of homesites and hospitality facilities. Thus, it lacks the image of remote wilderness found elsewhere on the North Shore.

It does offer convenient opportunity for lodging on the North Shore and otherwise experiencing Lake Superior through its several resorts, hotels, campgrounds, recreational areas, and waysides. It also offers the opportunity for stream trout fishing, smelting, and coasting for lake trout.

Figure 1.


MINNESOTA COAST
LAKE SUPERIOR NORTH SHORE
SHOWING SHORE SEGMENTS
8. Grand Portage
7. Hovland
6. Grand Marais
5. Lutsen/Tofte
4. Split Rock/Silver Bay
3. Gooseberry Falls
2. Two Harbors
1. Scenic 61
WATERSHED BOUNDARY
MINNESOTA
GRAND PORTAGE
HOVLAND
GRAND MARAIS
LUTSEN
TOFTE
TACONITE HARBOR
LITTLE MARAIS
SILVER BAY
BEAVER BAY
TWO HARBORS
FRENCH RIVER
DULUTH
LAKE SUPERIOR
WISCONSIN
0 5 10 15 20 25
MILES
North Shore
Shore Segment

Segment 2--Two Harbors

Two Harbors, with a population of over 4,400, is the largest urban area on the North Shore. It is the county seat of Lake County and has received a large part of its income from Great Lakes iron-ore shipping. Recently the community has taken major steps toward developing into a "resort city." These steps include:

- upgrading of the harbor front for recreational use,
- redesign and refurbishing the downtown area,
- developing Burlington Bay municipal campground,
- a new traveler information center,
- a new condominium resort development is underway.

Much remains to be done in aesthetics, activities for tourists, and hospitality facilities. But Two Harbors has made significant recent progress toward development of its tourism industry.

Segment 3--Goosberry Falls (Two Harbors NE for 15 miles)

This 15-mile segment provides the first real North Shore viewing/sightseeing experience, including rocks, escarpments, bluffs, and waterfalls at the Lake Superior interface. Its major features are Silver Cliff and Gooseberry Falls. The latter is a part of Gooseberry State Park. There are 14 resorts, motels, and campgrounds.

Segment 4--Split Rock/Silver Bay (To Cook County Line)

This 38-mile segment offers breathtaking views and clashing contrasts:

- It begins with the Split Rock Lighthouse: history, nature, and visual aesthetics combine to offer a unique experience.
- Facilities become further and further apart. Eight miles beyond Split Rock the traveler encounters the Reserve Mining Plant in striking contrast to the North Shore's natural area. Many travelers reject this scene, but it is a part of the unusual local economy and has potential for traveler interest.
- The mining "company town" of Silver Bay is the second largest urban center on the North Shore. To date, its economy and business leaders have focused upon the Reserve Mining plant for which the city was established.
- Beyond Silver Bay the traveler is again plunged into the North Shore escarpment. Palisade Head provides one of the more spectacular views.
- Further beyond, George H. Crosby Manitou State Park offers excellent hiking/backpacking opportunities. Tettegouche State Park is under development.

Segment 5--Lutsen/Tofte (Lake-Cook County Line to Grand Marais)
This 35-mile segment's tourism industry is approaching a growth takeoff phase.

- For years, it has had substantial winter tourism with the Lutsen ski hill serving as the flagship facility. This had a bellwether effect, spilling over into hospitality services along a 20- to 30-mile segment.
- The area had the only condominiums operating in 1981.
- New downhill facilities and condominium units are under development.
- A network of cross-country ski trails has been added.
- Facility operators have taken initiative to develop means of extending the season and to promote the area's tourism attractions.
- There are two state parks offering camping plus a number of lesser state facilities.

This segment demonstrates the potential for the tourism industry to effectively extend the operating season. The accompanying table contrasts the seasonal patterns of lodging registration in the Lutsen-Tofte segment with that in Grand Marais. Note that winter registrations in Lutsen-Tofte ran at 70 percent the summer rate, compared to less than 8 percent in Grand Marais. Fall business is also relatively higher there.

SEASONAL DISTRIBUTION OF LODGING REGISTRATIONS, 1981

Season	Grand Marais	Lutsen-Tofte
Winter	5%	28%
Spring	8%	10%
Summer	65%	40%
Fall	22%	22%
Total Percentage	100%	100%
Number of Rental Rooms, Cabins, and Condominiums	259	384

Segment 6--Grand Marais (To Devil's Track River)
Grand Marais, with its excellent harbor and waterfront, epitomizes the North Shore urban setting. Its siting, and visual and physical access to the waterfront are its greatest appeals. It becomes the most important destination and stopover point on the 150-mile expanse of shore. It offers the traveler a variety of hospitality operations, including a municipal campground and community theater, plus a full service range of other retail businesses. Its tourist season is primarily in the summer months; it does not currently share in the Lutsen-Tofte winter season.

Segment 7--Hovland (Devil's Track River to Grand Portage)
This 30-mile segment has some of the best available access to many beautiful pebble beaches. It also has long vistas of unspoiled waterfront. Unfortunately, it has less travel than Grand Marais and segments further west. Despite a smaller number of hospitality facilities, some are unique in design and siting. It also has one developed state facility, Judge Magney State Park.

Segment 8--Grand Portage (Grand Portage to Pigeon River)
This most northeastern segment of the North Shore has some of the most unusual and varied features of all:

- The Indian Village of Grand Portage
- The largest and most modern lodging facility
- The Grand Portage National Monument; interpretation of the voyageur fur trade era; the nine-mile Grand Portage Trail
- Boat access to Isle Royale National Park
- Really mountainous topography and accompanying sweeping vistas
- The Canadian border
- The high falls of the Pigeon River--the cause of the nine-mile Grand Portage
- Dependable snow and a substantial cross-country skiing market based on it

In the data presentation, Grand Portage and Hovland segments are grouped together to avoid disclosure of individual operations.

D. NORTH SHORE TOURIST MARKET SEGMENTS

A thumbnail sketch of North Shore tourists yields the following information:

- Tourists come in overwhelming proportions for recreational purposes.
- In summer and fall, sightseeing is the leading recreational objective and the visual amenities provide the greatest attraction.
- About one-half of all tourists' person-days occur in the summer months.
- Tourists come predominately from Minnesota. Substantial numbers are attracted from beyond the 12 northcentral states, extending to the east and west coast states.
- Sixty-two percent of all tourists do not stay overnight.
- Those staying overnight spend an average of 3.4 days on the North Shore.

- Lodging accommodations are 25 percent camping, 25 percent staying in their second home or a friend's home, and 50 percent using a commercial room/cabin.
- Travelers are well above average in terms of household incomes, education, and occupations. Fifteen percent reported household incomes of $50,000 and above.

Highlights of the above and related market segments are discussed at length below. Study of the tables can provide greater insight.

Why a North Shore Trip?

Tourists go to the North Shore for recreation, specifically sight-seeing (Table 6). The North Shore as a linear sight-seeing area, unique in this respect from other northeastern Minnesota tourist destination areas, was noted in research more than 10 years ago.[14/] Throughout the year, 60 percent of all person-trips are for recreational purposes. And while the proportion varies from season to season, it falls only to 51 percent recreational trips in spring. The person-trips understate the people impact of recreation. Since summer recreational tourists average substantially longer stays (2.9 days) than those there for work (1.3 days), or personal business (1.3 days), summer recreational visitors make up 78 per cent of all tourists on the shore at any one time in the summer season (Table 24).

Further supporting recreation as the dominant purpose on the shore is the finding that 86 percent of the parties staying in commercial lodgings were traveling on vacation (Table 40). What were the specific activities and features that brought this travel segment? Again, the natural features stand out as reasons for travel, especially in summer and fall. As indicated in Table 34, a very high proportion saw and liked what they saw of the northwoods, Lake Superior, scenic spots, wildlife, and natural formations. Those natural events that required special travel--greening of leaves in spring, fall colors, and winter scenery--were seen by fewer than half the parties. Those who saw them approved.

Man-made things were appreciated by much lower proportions. Only three-fourths of summer tourists "liked" views of the tourist facilities; small cities in the area were liked by about two-thirds, and only half approved of views of residents' homes. Wood processing and mining operations were liked by one-half or less of the tourists surveyed. This rejection appears due to a perceptual misunderstanding; man-made things are viewed as "despoiling nature." Their positive contributions are not understood since only limited attempts are made to interpret either the wood-using or mining industry to the uninitiated. The biggest surprise was that these tourists generally did not "like" what they saw other tourists doing.

In addition to recreation, tourists traveled the North Shore for work (13 percent), personal business (15 percent), and to visit friends and relatives (4 percent). The latter may also be considered a form of recreation. These three travel purposes are largely dependent upon the resident businesses and population. Since the North Shore has a small population, compared to the scale of its natural resource appeals, opportunities for these population-related travel purposes are small.

Finally, 8 percent traversed the North Shore as a travel corridor to somewhere else. These were U.S. citizens traveling to the BWCA and to Canada and Canadian citizens bound for other U.S. destinations. A 1972 study of Duluth's tourism found a high proportion (almost 60 percent) had destinations other than Duluth.4/ Up to one-half of some market segments passed through Duluth without stopping. In comparison with Duluth, the proportion who were simply passing through the North Shore area is negligibly small.

Ninety-two percent of tourism's economic impact on the North Shore in summer is due to recreational/pleasure travel there. This proportion is obtained by adding total spending by those traveling for pleasure with those visiting friends and relatives (Table 25).

Those there to work, go to conferences, and for personal business, combined, amount to only 6 percent of all summer economic impact. Those passing through in summer make up 6 percent of the vehicle parties but only contribute 1 percent of the dollar income. These groups tend to be in smaller parties, and make shorter visits; hence, their relative overall economic contribution is small. It should be recognized that for individual firms and in certain seasons they are important. Perhaps more significantly, those going to work are essential to the functioning of the North Shore economy; those on personal business are often vital to the welfare of North Shore residents concerned.

Where Do North Shore Tourists Come From?

Four out of every five tourist person-trips to the North Shore are made by Minnesota residents (Table 4). This overwhelming preponderance of Minnesotans comes about partly because people who live close by are frequent travelers on the North Shore; half of all North Shore tourists live within 50 miles.

A comparison using only person-trips overemphasizes the importance of those living within 50 miles. In summer, these vicinity tourists make up 37 percent of the person-trips and 45 percent of the vehicle-trips (Table 21). But compared to others, their average stay is much shorter and they travel in smaller parties. Thus, in the summer months only about one in six (17 percent) of the people actually on the North Shore on an average day live within 50 miles.

This actual people-impact of vicinity tourists provides perspective. While 57 percent of the tourists' vehicles encountered are those of vicinity residents (Table 3), these people make only 13 percent of the tourists' expenditures (Table 10). A high proportion of these vicinity tourists are there to work, and they are thus essential to the North Shore's operation. Those there on recreation would be expected to spend less, since this is near their home area, and they usually do not stay overnight.

Outside of Minnesota, where do North Shore tourists originate? About 15 percent of the person-trips come from all other states of the United States, and about 4 percent from Canada. Most of the latter are from the area of Thunder Bay, Ontario.

Of all states outside Minnesota, Wisconsin provides the most North Shore tourists (Tables 21 and 44). This would be expected since Wisconsin shares the western shores of Lake Superior with Minnesota. Compared with Minnesota tourists, the number from Wisconsin is low, comprising only 4 percent of the person-trips and 5 percent of the person-days during the summer months. This is a pattern observed in nearly all other parts of outstate Minnesota. Wisconsin has natural amenities similar to those in Minnesota and its citizens apparently prefer to recreate within their own state.

While part of Michigan is close by, few tourists seeking natural resource-based recreation on the North Shore or elsewhere in Minnesota originate in Michigan. Like Wisconsin, Michigan is well endowed with woods and waters (Michigan data is not shown separately in the tables).

Residents of other northcentral states, outside of Wisconsin and Michigan, must travel to find high quality amenities. And they are willing to travel long distances to reach the North Shore. In terms of resident population, the agricultural states of Iowa and the Dakotas supply the most summer tourists. They make up 5 percent of all summer person-trips. The industrial Midwest, mainly Illinois and Indiana (but including Ohio and Michigan), provide 7 percent of all summer tourists; but they come from a much larger population base.

The North Shore draws tourists from both the east and west coasts. But since travel is almost solely by automobile, the numbers from these distant states is low. Despite the travel distance, overall person-trips by tourists from outside the northcentral region in summer is still equal to about one-half the northcentral region's tourists from states outside Minnesota.

North Shore tourists from all origin points are fewer in the winter than in summer (Tables 4 and 44). But there are large differences in the seasonal patterns by origin. Vicinity tourists are relatively constant throughout the year. Their person-trips in summer are only about 50 percent higher than in winter. Consequently, vicinity tourist-trips, which are only slightly over one-third (36 percent) of all person-trips in summer, make up nearly two-thirds (63 percent) of all winter person-trips.

Travel from origins beyond 50 miles in Minnesota and from Canada have about the same seasonal patterns. The number of person-trips is about three to four times higher in summer than winter. But Canadian travel on the North Shore begins early in the year, so numbers of Canadians are relatively much higher in the spring than travelers from other origin points.

In contrast, person-trips by tourists from states outside Minnesota are more than ten times greater in summer than in winter. This finding supports other research that has found winter travel to Minnesota and Wisconsin destinations to be made up of much shorter trips, on the average.[8,16]

North Shore tourists from all origins list pleasure the most frequently as their main reason for travel. But the pattern of purposes of tourists from within 50 miles and of Canadians is substantially different from that of travelers from other origins. In summer, vicinity tourists make up three-fourths to four-fifths of all who are on the North Shore for work purposes and to conduct personal business (Table 38). Forty percent of the Canadians traveling in summer are passing through. They make up about 30 percent of all tourists having this purpose for North Shore travel.

The actual impact or presence of tourists from different origins has been partly discussed. It was noted that the number of persons on the North Shore at any one time was much lower for vicinity tourists in summer than those from other origins in comparison with their vehicle-trip data. This is due to smaller average party sizes and shorter average stays, as indicated in Table 21. Canadian tourists have similar characteristics. A high proportion are passing through or enter and leave the same day. Vicinity tourists stay an average of only 1.3 days, Canadian tourists an average of 1.2 days. This contrasts with average stays of 2.9 days for Wisconsin tourists and 4.3 days for tourists from the industrial Midwest.

Economic impact closely follows the person-days of tourists by their home locations. Two-thirds (66 percent) of all dollars spent by tourists come from Minnesota residents (Table 10). Those from all other states account for 31 percent of the tourists' income and Canadian dollars contribute just over 3 percent. This low proportion of expenditures by Canadians should not hide the fact that for certain facilities, especially those near the border, tourist income from Canada is a major factor.

In general, tourists from nearby spend the least per person-trip, with average amounts increasing as their homes are further away (Table 22). Thus, vicinity travelers spend an average in the summer of $5.40 per person-trip, and Canadians spend $13.10. This contrasts with the highest spending group, those from outside the Midwest, who spend over $35 per person-trip. A partial exception to the above general rule occurs in the case of tourists from Iowa and the Dakotas; they spend at a substantially lower rate ($24) than non-vicinity Minnesota tourists ($32) even though the latter are nearer to the North Shore.

Canadians are noted to report over one-fourth (27 percent) of all expenditures for shopping (retail purchases). This pattern is consistent with other current observations of Canadian travelers in Minnesota.

One further observation about Canadians may be useful. The market appears to be volatile. A 1972 study of Duluth tourism found Canadians travel in large parties and are relatively low spenders. In the current study, party size and spending rate does not appear greatly different from that of U.S. citizens who live close by, except that relatively more Canadians make retail purchases. But in 1982, as Canadian economic circumstances became more serious, Canadian tourist income almost dried up, having noticeable consequences for North Shore businesses.

Tourist Market Segments by Types of Overnight Lodging

Well over half (62 percent) of the person-trips to the North Shore are not overnight (Table 8). These are mostly made up of vicinity travelers and those who are passing through. In the summer, those not staying overnight make up 53 percent of the vehicle-trips, but only 17 percent of the persons actually on the shore during an average day (Table 26). A high proportion of this group are also vicinity tourists. Like most vicinity tourists, they use the highway a great deal, but otherwise have a relatively small impact.

Compared to resort operations, the motels house more in terms of people-days in the area and account for a larger total economic impact. Estimated dollars spent by motel guests are about $7.7 million compared to $4.2 million for resort guests. This figure includes all expenditures on the shore, not just that for lodging. Expenditures by campers are at a lower level. While they are on the shore for 459,000 person-days, they spend an estimated $2.9 million.

Condominiums in 1981 were confined to only one part of the shore and accounted for only 115,000 person-days, but condominium users tend to spend heavily and they accounted for $2.5 million of total dollars spent. Second home users (discussed in more detail below) were present for 250,000 person-days and spent $2.7 million.

Finally, there are those staying with friends and relatives. Because of the low population density on the shore this number is small. But despite the fact that those staying with friends do not spend money for lodging, they still spend at a rate per person-visit of about $25. This is approximately one-half the expenditure rate of those staying in motels and resorts, and nearly the same as those who camp. This finding, that those who visit friends and relatives contribute sizable local impact, $1.2 million annually on the North Shore, is supported by other Minnesota studies. [4,5,8]

Seasonal Use of Facilities

Most person-trips have a general seasonal pattern. This, among other factors, is influenced by: 1) the high volume of toursits who travel from within 50 miles, make up relatively stable numbers through the year, and usually take day-trips requiring no overnight lodging; and 2) a high seasonal variation in travel patterns by tourists coming from a distance, most of whom stay overnight.

In comparing the several geographic segments of the North Shore, there are sharp differences in the seasonal pattern of lodging use. The Lutsen Tofte area has winter registrations that are 70 percent of their summer level. This winter lodging use is much higher than in other segments of the North Shore.

What then is the general seasonal pattern when comparing the several lodging facility types? These may be summarized as follows:

> The most highly seasonal are the resorts and the campgrounds with about 75 percent of registrations in the three summer months. Resorting grew in the traditional pattern of outdoor recreation in Minnesota, meaning that it was primarily a summer activity. On the North Shore, even when winter sports are ignored, this pattern has altered somewhat in recent years. Some resort operations now report September occupancies that exceed those in June. This results largely from promotion of fall leaf color tours. Camping apparently continues throughout the entire year, although at a very low level in winter months. Traffic surveys made in the November to March period found some recreational vehicles on the North Shore in every month.
>
> Condominiums currently show the least seasonal variation in use among the commercial facilities. This is because the only condominiums are now in the Lutsen-Tofte segment where winter activities are emphasized. Among these facilities, winter use is currently as high as summer use.
>
> Motels are less seasonal in their business than resorts, but only to a small extent. Despite the year-round availability of motel rooms, one-half to two-thirds of their registrations occur in the summer season. There are individual exceptions of motels with a strong winter business.

The pattern of lodging in friends' and relatives' homes was not directly measured in seasons other than summer. However, since a large proportion of this market originates from nearby, it would be expected to show a pattern closely resembling that of visits by all vicinity travelers. That means that summer person-visits would be only one-half larger than in winter. This contrasts with motels that have summer registrations as much as six or more times larger than in winter.

Less than 20 percent of those coming to the North Shore to work or for personal business stay overnight (summer data only, Table 39). Less than 10 percent of those passing through stay overnight. About two-thirds of those there for pleasure in the summer stay overnight. Those on the shore for work purposes who stay overnight use commercial rooms in the highest proportion (63 percent) but they make up only 7 percent of those users in summer since their overall numbers are relatively small. Not surprisingly, well over half of those coming to visit and for personal reasons stay overnight with friends and relatives. But they are still outnumbered, in absolute terms, by the 4 percent of those traveling for pleasure who also stay with friends and relatives. This is because the latter group makes up such a large proportion of all travelers.

When overnight and lodging patterns of those coming from different geographic areas are compared, it is found that only 14 percent of vicinity residents and 27 percent of Canadian residents stay overnight (summer data only, Table 40). In contrast, 94 percent of those from Iowa and the Dakotas stay overnight. This suggests that most of these latter travelers see the North Shore as a major destination. But the high proportion staying overnight can also result from the location of these states at a distance of about one day's drive. Of those from the states of Wisconsin, Iowa, the Dakotas, and the industrial Midwest who stay overnight, almost one-half camp. This is nearly two times the camping proportion of those who come from Minnesota beyond 50 miles. It is also of interest that the highest proportion of those using second homes are from more distant states in the U.S. This reinforces the general observation that ownership of a second home may act as a strong destination pull.

Second Home and Recreational Properties and Their Owners

This section reviews second homes and recreational properties on the North Shore owned by nonresidents of the county in which the real estate is located. Included are data of use and other owner activities and characteristics.

Second home owners and their related recreational activities constitute major elements of Minnesota's outdoor recreational activity pattern and its use of high amenity (waterfront) land. Total person-days of use related to second homes has been calculated as high as four times that of resort patron use in Minnesota.11/ In addition to their recreational life style uses, most such properties are in high amenity locations; hence, they pose land management problems.

There are an estimated 1,541 tourist-owned (nonresident) recreational and second home ownerships on or near Lake Superior in Lake and Cook Counties (Table 16). Fifty-eight percent of these (895) have second homes. Eighty percent of these homes have water frontage, with an average of 613 feet. The average second home property is used annually for 282 person-days for an overall total of 252,500 person-days by all second home tourists. This estimate of use per home compares closely with other second home studies made in Minnesota where 250 to 300 average person-days of use were estimated.12,15,18/

A total of almost $2.3 million is spent on the North Shore by these second home tourists. Including taxes paid for recreational property with no buildings, almost $2.7 million is contributed to the local economy.

In summary, second home tourists account for about 15 percent of all tourists' person-days and about 11 percent of the tourist income.

Definitions and methods. Properties within a band approximately five to eight miles in width along Lake Superior are included. The width varies since data are tabulated by townships. Data of numbers of ownerships and property value are made directly from Lake and Cook County Assessors' records. Data about owners' spending, use, and activity patterns was gathered by means of a telephone questionnaire to a random sample of nonresident owners. Only Lake and Cook County second homes are considered. This excludes a small number of tourists' second homes along the North Shore in St. Louis County. Partly offsetting this omission is the inclusion of a small number of owners, estimated at 1 1/2 percent of the total, who do not live in the county where their property is located but who live in another North Shore county. By the general definitions used in this study, these latter are not tourists.

Who owns recreational and second home properties and what are the property characteristics? There are a total of 2,157 owners of recreational and second home properties along the North Shore in Lake and Cook Counties. Twenty-nine percent of these are local county residents. The other 71 percent (1,541 ownerships) are nonresidents or "tourist owners." Of these, the large majority (72 percent) are Minnesota residents with the balance being about evenly divided between owners living in other north central states (15 percent) and those living in states beyond (13 percent).

Residents of the Twin Cities dominate the Minnesota tourist owners, making up 62 percent of the Minnesota total. Another 12 percent live in the Duluth vicinity; the remaining one-fourth (26 percent) live elsewhere throughout Minnesota (Table 18).

Of the tourist owners, Minnesotans (63 percent) are the most likely to have second homes on their property. This proportion is closely matched by owners living in other northcentral states who, on the average, have the most valuable properties. Owners living beyond the northcentral states are no more likely than county residents to have second homes on their proper ties. As a consequence, their holdings have an average market value barely half that of residents of northcentral states outside Minnesota.

The average nonresident ownership is about 12 acres compared with 18 acres for county residents. (These figures are underestimates since small lot acreages could not be determined.) But while local county residents average larger acreages, their holdings have lower average market value: $13,000 as compared to $34,000 for nonresidents. This difference is largely due to the fact that a much higher proportion of nonresidents' holdings include a building, usually a second home (58 percent compared to 32 percent).

The average property had been held for 18 years. The most surprising related finding was that, on the average, owners outside Minnesota had held their properties as long as 34 years, more than twice as long as Minnesota tourist owners at 14 years.

Economic impact of tourist second homes. All tourist second home owners spent a total of $2,278,300 in 1981 on the North Shore (Table 18). When $409,600 taxes paid by nonresidents who own property without homes are added, the total is $2,687,900. Expenditures of this latter group are not included in Table 18. If they visit the North Shore, their living expenditures will be included in other lodging categories since they do not have a second home to stay in.

The average tourist second home owner spends $2,545 annually in the area. Of this amount, almost 65 percent is spent on housing. The other 35 percent is spent for living, transportation, recreation, and retail purchases. The average expenditure per person-day is $9.02. This compares with $8.37 spent by all summer tourists and with $9.49 spent by summer tourists who stay overnight.

Taxes make up almost one-fourth of all second home expenditures, $597 per home. Tax payments to Lake and Cook Counties by nonresident owners of North Shore lands total almost $1 million, ($944,000, Table 16). Maintenance and new additions together generate more local expenditures than taxes costing an average of $717 per second home or 28 percent of all expenditures. These are mainly to local building suppliers and for construction labor (Table 18).

Food costs make up over two-thirds of the non-housing expenditures. Grocery purchases make up 71 percent of food costs, amounting to an average of $433 per home and almost $400,000 per year. This confirms the fact that grocery stores share importantly in a community's tourism industry. Restaurants also share; they receive $173 per tourist second home for a total of over $150,000 annually.

Transportation expenditures, mainly automobile fuel and services, average almost the same as money spent in restaurants at $177. Recreational expenditures are small, on the average, as are other retail purchases. However, owner interviews discovered individuals who made liberal purchases in the North Shore communities.

Tourist owners living outside Minnesota make substantially more use of their second homes than Minnesota residents and spend almost four times as much: an average total of $6,029 versus $1,549. They spent sharply more on their housing and for living in the area. Within Minnesota, residents of the Twin Cities spent about 40 percent more than Minnesotans living in other parts of the state.

As a consequence of expenditure rates, the total contribution to local tourist income has the following pattern. Second home owners living outside Minnesota own only 22 percent of the North Shore's second homes, but they contribute over half (53 percent or $1,200,000) of the total revenue from tourist second homes. Twin City residents make up 62 percent of the Minnesota owners (not counting Lake and Cook County resident owners) but they contribute 70 percent of the second home income from Minnesotans, or 33 percent of all tourist second home income. Twin City residents make up almost exactly 50 percent of the total Minnesota population. Thus their representation in North Shore second homes is well above their proportion in the state.

Attractions of the North Shore for second home owners. Why do people own second homes on the North Shore? This is indicated by their rating of features in the area, by where their second homes are located, and by their activities while there. The general ambience of the North Shore--Lake Superior, northwoods, rocks and cliffs--provides the overwhelming appeal to second home owners just as it does to other tourists (Table 19). This is supported by the fact that 80 percent of all homes have water frontage (Table 17). It is supported even more strongly by indicated preferences for activities; general enjoyment of the out-of-doors was overwhelmingly the top choice (Table 20).

Interestingly, the appeal of the North Shore and northwoods experience was strongest as the residence of second home owners was further away. In this case, familiarity appears to lessen the appeal of the exotic "north." Instead, those living nearby seek specific activities. For example, 80 percent of owners from outside

Minnesota reported enjoying the outdoors in a nonconsumptive way such as through hiking and observing nature. Only 50 percent of owners living in Duluth thought this their most important recreation while at their second home. Instead, hunting and fishing were the top recreational activities for 40 percent of the Duluth residents (Table 20).

An expected corollary was that Duluth residents with North Shore second homes rated rivers, streams, and inland lakes substantially higher than non-Minnesotans as contributing to their recreational experiences. For non-Minnesota residents, the northern mystique extends beyond nature. They apparently find appeal and charm in the small cities along the shore and rate them highly as a part of the North Shore experience. Duluth residents, in contrast, have close association with these communities and find them of lesser appeal (Table 19).

Socioeconomic Segments

North Shore tourists represent the upper socioeconomic levels in large proportion (Table 13). This finding differs from those of a study made 12 years earlier in which North Shore tourists were close to average in socioeconomic profile.[14/] There have been a number of structural changes in both society and in travel over the past 12 years; this finding suggests a shift in North Shore market segments.

In summary, compared to the U.S. population:

- A substantially higher proportion of tourists were in the over $35,000 household income bracket. There were 33 to 36 percent in the 1981 North Shore sample compared to 26 percent for the U.S. generally.
- There were higher proportions of both managers, professionals, and retired among the North Shore tourists.
- Educational attainment was one of the largest points of difference. Seventy-five to 79 percent had more than a high school education compared to 32 percent of the U.S. population.

Tourists' Travel Patterns on the North Shore

Because of the linear sightseeing characteristics of the North Shore, many tourists treat it as a multiple-stop area. Those contacted in Cook County lodging operations had spent over one-third of their total nights on the shore at another North Shore facility. This mobility was about one-third greater in summer than in winter. In addition, these same people had spent 37 percent of their total time in northeastern Minnesota in the BWCA or in vicinity communities. Nineteen percent indicated that they actually entered the BWCA. These insights suggest a complex pattern of use for a substantial number of North Shore tourists.

On the other side of the ledger, 30 percent of summer tourists did not venture beyond the junction of Minnesota Highway 1, barely more than one third of the full length of the North Shore (Table 14). This data largely excludes those vicinity travelers who made short work trips out of Duluth.

Return visitors predominate; in 1981 only 6 percent of summer visitor parties were on their first trip there (Table 14). Almost three-fourths had made one or more visits in the past five years. About one-third (32 percent) of the Cook County lodging guests made two or more trips to the North Shore in 1981 and 5 percent made five or more trips. It thus appears that visits to the North Shore tend to be repeated and that some make intensive use of its facilities.

Visits are relatively short, averaging about 3.6 days (2.6 overnight stays) for 1981 visitors who stayed overnight (Table 15). All summer visitors stayed an average of 2.51 days, and all visitors for the 1981 year stayed an average of 1.92 days, less than one night on the average. The longest stays are made by those using second homes (6.27 days, Table 26) and by those camping 3.83 to 4.65 days (Tables 15 and 26). In the summer season, visitors from the industrial Midwest stay the longest time (4.26 days) and those from Canada and nearby U.S. locations have the shortest average stays (1.34 and 1.16 days, respectively, Table 21).

Attitudes Toward Hospitality Services

North Shore tourists react favorably toward the food and lodging services they encounter; 88 percent of the summer tourists were satisfied with lodging accommodations, 90 percent were satisfied with food service quality, and 84 percent were satisfied with treatment by lodging hosts (Tables 30-33). It is doubtful that higher satisfaction ratings would be given to many other tourist destination areas. In interpreting this finding, the reader should bear in mind that such ratings reflect a multiplicity of factors: what is expected, what is considered appropriate for the setting, the price, and comparative experiences elsewhere.

Summer tourists with higher incomes register higher levels of satis faction with hospitality services than those with lower incomes. Also, those who go further up the shore, past Minnesota Highway 1, are substantially better satisfied with services than those going only one-third or less of the distance. Other relationships (shown in Tables 30-33) related to whether tourists stay overnight or frequency of visits show less definite patterns.

Tourists' Information Sources

Travelers do not go places they have never heard of, to do things they do not know about. This comment underscores the critical role of information in assessing the recreational experiences of the North Shore. This study was not primarily designed to investigate information mechanisms. But in conducting the research effort, it was informally observed that many travelers were eager for more information than they found available. Also, many missed features of great interest to them simply because they did not know about them. Tables 35 and 36 show information sources used before going to the North Shore and those used after arriving there. They give data separately for summer and fall (mainly September) tourists, and also by their frequency of travel to the North Shore.

Friends, family, and previous experiences provide by far the most-used information for deciding to go to the North Shore. In this respect, North Shore tourists are like travelers to other destinations as revealed by other market studies. Almost two-thirds of summer tourists who had never been to the North Shore used information from others. This factor translates into "satisfied experiences." It underscores the importance of delivering quality services and adequate information to tourists while they are physically present.

Newspapers and travel clubs were an additional important source of information for tourists who had never been to the North Shore. Other information sources having importance to the general range of travelers include managers of resorts and outfitting services, managers of governmental facilities such as the U.S. Forest Service and the National Park Service, and tourism associations.

After tourists arrive in the area, chambers of commerce and highway information stations become added important information sources. This is in addition to the fact that tourists also rely on people in facilities after they arrive as well as before getting there.

The wide use of information to help guide travel at all stages suggests the need for an information-direction system. Obviously one is already operating, but observations indicate the need for continued systematic effort to improve its effectiveness.

Potentials of North Shore Market Segments

The research reported here treats 1981 market segments. These segments indicate those who now respond to the North Shore's tourism appeals. One assumption, proved valid by practice, is that present segments will yield well to marketing efforts because of their predisposition to travel to the North Shore. It is recommended that this data be used in guiding future marketing efforts. For example, from the data previously discussed, it appears that the Minneapolis-St. Paul metropolitan area would be by far the most productive for winter season advertising. Fifty percent of the current market comes from there, with another 21 percent from the adjacent exurban area (Table 44).

Another approach is to search for populations wanting the kinds of recreational experiences available in the North Shore, but that are not now adequately represented among the present tourism market segments. The challenge then is to devise merchandising means, transportation, and related systems that will make it possible to sell to a larger proportion of that market. Such an approach is usually considered long-range since results are not as immediate as those obtained from expanded effort in well established markets. At the same time, long-range market health of the North Shore's tourism may depend upon a balance of efforts directed in this way.

Table 52 provides data of a 1980 study of the Chicago market and its application to northern Minnesota. 19,20/ This included only the upper two-thirds of socioeconomic census tracts, hence populations with relatively good means for travel. Only 13 percent of those studied had been to northern Minnesota (the part of Minnesota north of the Twin Cities) in the past five years. But those who wanted to go had a high preference for major recreational features of the North Shore: natural areas, fall colors, historical sites, hiking, fishing, and water sports. A related study of other midwestern cities (Springfield, Illinois; Des Moines, Iowa; Kansas City, Missouri; and Indianapolis, Indiana) found similar demand. These suggest a high level of demand in midwestern markets for the North Shore's recreational offering. The challenge is to make this an effective demand for the North Shore.

A part of the demand pattern of present users--predominant appeal of the natural features and the fact that 65 percent of summer tourists reported hiking--can be made compatible with a relatively high socioeconomic level of tourists. It can also fit with a marketing program based upon knowledge of the large numbers wanting what the North Shore offers. These are parts of the general awakening to appreciation of the out-of-doors and the rewards of outdoor activities. They support an optimistic view that much of this interest can be converted into effective demand.

Combined with the above approaches is the need for careful study of demands by market segments for activities and facilities. The aim is to make these features accessible to the appropriate segments. The accompanying report addresses this matter in greater depth.17/

IV. SOME APPLICATIONS TO THE NORTH SHORE'S TOURISM INDUSTRY

This section summarizes some of the key observations of this study and begins the "so what?" process. It is intended to assist users in the application of findings in the development of the North Shore's tourism industry. The real dynamics of this application process depend upon interest, discussion, and positive actions by North Shore citizens, business managers, and agency officials at all levels.

The approach is from the viewpoint of overall market segments and industry structures and their relationships to the natural resources and tourism plant. Some major observations and their applications:

Tourism is a major economic activity on the North Shore. Annual sales total $24.5 million and are equal to 35 percent of all retail and selected services sales. Tourism offers one of the best available opportunities for both economic growth and stability. This suggests that high returns are possible from systematic efforts at tourism development.

The North Shore's major tourist attractions are the visual amenities of its outstanding natural features. These include views of Lake Superior, the rugged escarpment forming its shore, the billion-year-old lava flows, pebble beaches, myriad waterfalls, and the semi-boreal vegetation. It is significant that visual amenities remain despite development of about 130 lodging facilities, almost 900 second homes, 19 cities and villages, plus many other service features and residential homes. Throughout much of the 150-mile length of shore there is the illusion of a natural area, space, and even wilderness. Factors that have operated to maintain the appeals are: modest development that has not overpowered the natural features, set-back and screening of many developments, clustering, and public reservations of some lands. Recognition of the key role of visual natural qualities, and management by all concerned to maintain these qualities, appears essential to the North Shore's tourism industry.[3]

Northeastern Minnesota includes a complex of at least eight national level tourism attractors (See Section III.B., Tourism Industry Components). The challenge is to take advantage of their traveler appeal for building the North Shore's tourism income and that of the entire northeastern Minnesota region.

Much of the hospitality plant (mainly resorts, motels, restaurants) serving North Shore tourists is characterized by the pattern of tourism services of five decades ago when the area first experienced rapid growth. These operations are seasonal, small proprietorships. Income and cost patterns have reduced profitability so there is a high rate of part-time operation and close-out of operation. This is a situation growing out of the historical past and tourism's current condition of international competition. These operations have the advantage, noted above, of not intruding greatly upon the natural setting. Further, they provide an excellent recreational experience for users who are adapted to these types of facilities. They have disadvantages in that they often lack market power. Operators who divide their energies among several economic activities may find themselves unable to devote the necessary attention either to the operation of their facility or to the cooperative job of building the North Shore's destination image in the marketplace. The challenge is to take advantage of the strong points of the present operations, to strengthen their ability to be profitable, and to provide for new services as needed.

Users of hospitality services report high levels of satisfaction. This commends present operators and employees. It provides a good base for continued high quality of services to tourists.

The North Shore's tourism industry shows potential for dynamic growth and development. Much of the tourism in the rural areas of upper Great Lakes states has suffered from two decades of uncertain growth. The North Shore has many "bright spots" that indicate resurgence not only in growth but in the fundamental nature of the industry. Among these are the following:

* New business leadership has emerged, demonstrating successful operation of hospitality businesses. Some northeastern Minnesota hospitality firms have tripled their sales in a five-year period.7/
* Information services to travelers have been improved greatly.
* Winter operation in the Lutsen-Tofte area has become a major profit factor. Winter operation has developed at Grand Portage and on the adjacent Gunflint Trail. 1,2/
* September tourism has expanded and now rivals June as a part of the tourist season.
* Two Harbors, formerly interested mainly in iron ore shipment, is in the process of greatly upgrading its appeal to travelers.
* The North Shore was one of the first Minnesota areas to install condominium lodging. There is now a new momentum in their development there.

* Facilities are being added for activities, including: downhill skiing, cross-country skiing, snowmobiling, and hiking. These are partly responsible for the change in seasonal tourism patterns in parts of the North Shore.
* There is evidence of a shift in the relative socioeconomic status of North Shore tourists. It may be associated with development of the activities features noted above, with new lodging facility development, and with interest in out-of-door involvement by certain parts of the society. It suggests demand for maintaining a high quality recreational offering for the North Shore destination area.

These are viewed as positive. There are many more related developments. Every effort should be made to move with the stream of these positive developments, to expand the sales package in size, quality, and range, yet retain the quality of the natural resources.

Can present travelers be induced to do more on the North Shore or to stay longer? This research has discovered that about half of all person-trips are not overnight. These are people who make a short incursion into the shore or who pass through to another destination. In addition, those staying overnight average short stays. The challenge of these tourists, already present, is to "sell" more of the North Shore to them. Such efforts might include expanding the package of things to see and do, and the hospitality offering. It might also require continued upgrading of the information/promotion system.

The U.S. vacationing public places high priority on the kinds of attractions offered by the North Shore. Currently North Shore tourists come largely from Minnesota. But some come from all parts of the U.S. and want to see natural areas, historical sites, and go hiking. How can these opportunities for expanded markets be efficiently and effectively put into operation?

Market tests verify the appeal of northeastern Minnesota. A recent newspaper ad series received 5,000 requests for more information. Because of these findings, systematic marketing efforts can be expected to yield good results. Such efforts can build upon marketing already underway, and include travel packaging, group tours, and tests of new markets.

All of the above are means of tourism industry building. Users of this report are encouraged to modify and add to the list from their own perspectives. These reveal major tides effecting change in tourism markets and their relationship to the North Shore. Efforts to move against the tide will almost certainly encounter difficulty; understanding of the tides will enable the North Shore to take major advantage of them in development of its tourism industry.

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APPENDIX

OVERALL ESTIMATES OF NORTH SHORE TOURISM/TRAVEL

TABLES 1-15

DATA OF TOURIST'S SECOND HOMES, RECREATIONAL PROPERTIES AND THEIR USE

TABLES 16-20

16. Holding of Recreational and Second Home Properties [By Non-Residents (Tourists) on the North Shore] with Resident Owner Comparisons.

17. Selected Ownership and Use Characteristics of Non-Residential, North Shore Second Home Owners [By Home Location].

18. Expenditure Patterns of Tourist Owners of Second Homes on the North Shore [By Residence of Owners].

19. Rating of Selected Features of the North Shore [By Tourist Second Home Owners According to Their Contribution to the Owners Recreational Experience].

20. Most Important North Shore Recreational Activities of Tourist Second Home Owners, Percentage Distribution [By Home Location].

DATA OF SUMMER TOURISTS DERIVED FROM DIRECT CONTACT
WITH SUMMER TRAVELERS ON THE NORTH SHORE

TABLES 21-40

DATA OF LODGING GUESTS DERIVED FROM PUBLIC LODGING FACILITY GUESTS IN COOK COUNTY

TABLES 41-51

MARKET DATA FROM HOME AREA SURVEY

TABLE 1. NORTH SHORE TRAFFIC FLOW BY SEASONS, 1981 1/

Season 6/	Exit Point							
	Total, North Shore 5/		Lester River, U.S. 61 2/		Finland, MN #1 3/		Pigeon River, U.S. 61 4/	
	Vehicles	Percent	Vehicles	Percent	Vehicles	Percent	Vehicles	Percent
Winter (D.J.F.)	193,350	18.1	169,700	18.8	10,180	20.3	13,470	11.5
Spring (M.A.M.)	239,220	22.3	202,700	22.4	10,820	21.5	25,700	21.9
Summer (J.J.A.)	357,120	33.3	288,000	31.9	16,220	32.3	52,900	45.0
Fall (S.O.N.)	281,980	26.3	243,590	26.9	13,050	25.9	25,340	21.6
Total 1981	1,071,670	100.0	903,990	100.0	50,270	100.0	117,410	100.0
Percent Horizontal	100.0		84.3		4.7		11.0	

1/ Data are for exiting traffic only; each vehicle is counted only one time.

2/ Lester River data are derived from permanent MDOT Automatic Traffic #213 at the Lake-St. Louis County line on U.S. 61, supplemented with data from scenic 61 and actual counts by observers made at the Lester River.

3/ Finland data are derived from MDOT Automatic Traffic Counter #214 near Finland on MN #1.

4/ Pigeon River data are derived from monthly data supplied by Statistics Canada and generated at the Canadian border customs station.

5/ The total is a slight underestimate since there are other means of accessing the North Shore in addition to the three employed here. No adjustment is made for these other routes since the number of tourists using them is believed to be small.

6/ Months making up each season are as shown by the abbreviations. The Winter season is made up of December 1981 added to January and February 1981.

TABLE 2. TOURIST-RESIDENT BREAKDOWN OF NORTH SHORE TRAFFIC FLOW BY SEASONS, 1981[1/]

Season[4/]	Total Traffic Flow		Tourists[2/]		Residents[3/]	
	Vehicles	Percent	Vehicles	Percent	Vehicles	Percent
Winter (D.J.F.)	193,350	18.1	99,930	16.2	93,420	20.6
Spring (M.A.M.)	239,220	22.3	136,820	22.1	102,400	22.6
Summer (J.J.A.)	357,120	33.3	227,100	36.7	130,020	28.7
Fall (S.O.N.)	281,980	26.3	154,770	25.0	127,210	28.1
Total 1981	1,071,670	100.0	618,620[2/]	100.0	453,050	100.0
Percent Horizontal	100.0		57.7		42.3	

1/ See footnotes 1 thru 5 on Table 1.

2/ The total number of tourist vehicles includes 29,930 that are double counted.(Exit more than one time from the North Shore on the same trip). The actual count of tourist vehicles is 588,690.

3/ Resident vehicles include buses and trucks. Bus passengers and operators and some truck operators can be considered tourists. The total counts of tourist person trips in other tables derived from this data are conservative to the extent of these exclusions.

4/ Months of the seasons are indicated by the initials.

TABLE 3. HOME LOCATION OF NORTH SHORE TOURISTS VEHICLE TRIPS BY SEASON, 1981

Season[1]	All Tourists		Location of Tourists' Homes			
			Vicinity[2]	Distant MN[3]	Other States[4]	Canada[5]
	Vehicles	Percent				
		%	%	%	%	%
Winter (D.J.F.)	96,340	16	20	15	7	14
Spring (M.A.M.)	127,410	22	22	23	13	27
Summer (J.J.A.)	220,600	37	30	44	59	35
Fall (S.O.N.)	144,340	25	28	18	21	24
Total 1981	588,690	100	100	100	100	100
Number Vehicles	588,690		336,060	148,510	71,910	32,210
Percent Horizontal	100		57	25	12	6

[1] Seasons include the months of 1981 indicated by initials.

[2] Vicinity tourists are all those estimated to live outside the North Shore but within 50 miles of it in the U.S. The largest number are from Duluth. Superior, Wisconsin residents are included as part of vicinity.

[3] Distant Minnesotan's include all those whose residence is more than 50 miles from the North Shore.

[4] Other States - include all other U.S. origins outside Minnesota and Superior, Wisconsin.

[5] Canadians - include all having residence in Canada, the preponderance of these come from Thunder Bay, Ontario.

TABLE 4. HOME LOCATION OF NORTH SHORE TOURISTS, PERSON TRIPS, BY SEASON, 1981

Season[1]	All Person-Trips		Location of Tourists' Homes			
			Vicinity[2]	Distant MN[3]	Other States[4]	Canada[5]
	Number	Percent				
		%	%	%	%	%
Winter (D.J.F.)	216,900	16	20	15	7	13
Spring (M.A.M.)	287,800	21	22	22	12	31
Summer (J.J.A.)	544,300	40	30	46	63	34
Fall (S.O.N.)	315,800	23	28	17	18	22
Total 1981	1,364,800	100	100	100	100	100
Person Trips	1,364,800		670,800	418,200	204,600	71,200
Percent Horizontal	100		49	31	15	5

See Table 3 for footnotes.

TABLE 5. TOURISTS' PURPOSES FOR TRAVEL ON THE NORTH SHORE, VEHICLE TRIPS, BY SEASON, 1981

Season[1/]	All Vehicle Trips		Purpose of Travel on North Shore					
			Recreation	Personal	Work	Pass Thru	Visit F&R	Other
	Numbers	Percent						
		%	%	%	%	%	%	%
Winter (D.J.F.)	96,300	16	15	20	19	14	14	17
Spring (M.A.M.)	127,400	22	19	25	25	28	19	22
Summer (J.J.A.)	220,600	37	42	30	30	30	48	38
Fall (S.O.N.)	144,400	25	24	25	26	28	19	28
Total 1981	588,700	100	100	100	100	100	100	100
Vehicle Trips	588,700		320,900	105,600	92,600	45,500	21,700	2,400
Percent Horizontal	100		54	18	16	8	4	*

1/Seasons include the months of 1981 indicated by the initials.
2/F&R is Friends and Relatives
* Less than 0.5%.

TABLE 6. TOURISTS' PURPOSES FOR TRAVEL ON THE NORTH SHORE, PERSON TRIPS BY SEASON, 1981

Season[1/]	All Person Trips		Purpose of Travel on North Shore					
			Recreation	Personal	Work	Pass Thru	Visit F&R	Other
	Numbers	Percent						
		%	%	%	%	%	%	%
Winter (D.J.F.)	216,900	16	15	19	19	13	13	17
Spring (M.A.M.)	287,800	21	18	25	26	29	18	22
Summer (J.J.A.)	544,300	40	45	31	30	31	51	39
Fall (S.O.N.)	315,800	23	22	25	25	27	18	22
Total 1981	1,364,800	100	100	100	100	100	100	100
Person Trips	1,364,800		813,300	208,700	181,600	104,600	52,000	4,600
Percent Horizontal	100		60	15	13	8	4	*

See footnotes Table 5.

TABLE 7. LODGING MEANS OF NORTH SHORE TOURISTS, VEHICLE TRIPS BY SEASON, 1981

Season[1/]	All Vehicle Trips		Not Overnite	Total[2/] Overnite	Principal Means of Overnite Lodging[3/]					
					Motel[4/]	Resort	Condo	Camp	Second Home	Friends & Relatives
	Numbers	Percent								
		%	%	%	%	%	%	%	%	%
Winter (D.J.F.)	96,300	16	20	8	12	1	30	*	1	17
Spring (M.A.M.)	127,400	22	26	13	11	10	13	7	17	21
Summer (J.J.A.)	220,600	37	28	58	53	70	28	74	67	38
Fall (S.O.N.)	144,400	25	26	21	24	19	29	19	15	24
Total 1981	588,700	100	100	100	100	100	100	100	100	100
Vehicle Trips	588,700		410,200	178,500	45,600	30,100	7,100	39,800	17,500	38,400
Percent Horizontal	100		70	30	8	5	1	7	3	6

1/ Seasons include the months of 1981 indicated by the initials.

2/ "Total Overnite" is the sum of all six right hand columns.

3/ Principal means of "lodging" is that indicated by travelers, however, about one-third of all parties reported using more than one means of lodging.

4/ Includes both motels and hotels.

* Less than 0.5 percent.

TABLE 8. LODGING MEANS OF NORTH SHORE TOURISTS, PERSON TRIPS BY SEASON, 1981

Season[1/]	All Person Trips		Not Overnite	Total[2/] Overnite	Principal Means of Overnite Lodging[3/]			
					Commercial[4/] Room	Camp	Second Home	Friends & Relatives
	Numbers	Percent						
		%	%	%	%	%	%	%
Winter (D.J.F.)	216,900	16	20	9	12	*	4	16
Spring (M.A.M.)	287,800	21	27	12	10	6	16	21
Summer (J.J.A.)	544,300	40	28	59	58	76	66	40
Fall (S.O.N.)	315,800	23	25	20	20	18	14	23
Total 1981	1,364,800	100	100	100	100	100	100	100
Person Trips	1,364,800		839,700	525,100	252,200	122,300	48,300	102,300
Percent Horizontal	100		62	38	18	9	3	8

See Table 7 for footnotes 1 through 3

[4/] Commercial Room includes those staying on the North Shore by motel, hotel, resort and rental condominium facilities. Commercial room types are estimated to be broken down for the entire season as follows: Hotel/motel - 51 percent; resort - 37 percent; condominium - 12 percent. The seasonal breakdown is not shown because of difficulty of estimating differences in party size by season.

TABLE 9. TOURISTS' PERSON-DAYS ON THE NORTH SHORE BY LODGING MEANS AND SEASON, 1981

Season[1/]	Total Person-Days		Not Overnite		Total[2/] Overnite		Principal Means of Overnite Lodging[3/]			
							Commercial[4/] Room	Camp	Second Home	Friends & Relatives
	Numbers	Percent	Numbers	Percent	Numbers	Percent	%	%	%	%
Winter (D.J.F.)	328,000	13	169,000	20	159,000	9	14	*	4	16
Spring (M.A.M.)	398,000	15	226,000	27	172,000	10	10	7	7	19
Summer (J.J.A.)	1,367,000	52	233,000	28	1,134,000	63	58	77	76	39
Fall (S.O.N.)	528,000	20	212,000	25	316,000	18	18	16	13	26
Total 1981	2,621,000	100		100		100	100	100	100	100
Person Days	2,621,000		840,000		1,781,000		834,000	459,000	266,000	222,000
Percent Horizontal	100			32		68	32	18	10	8

See Table 8 for footnotes

TABLE 10. TOURISTS' EXPENDITURES ON THE NORTH SHORE BY HOME LOCATION AND SEASON, 1981

Season[1]	All Tourists		Location of Tourists' Homes			
			Vicinity[2]	Distant MN[3]	Other States[4]	Canada[5]
	Dollars	Percent				
		%	%	%	%	%
Winter (D.J.F.)	3,412,000	14	14	18	7	6
Spring (M.A.M.)	3,965,000	16	23	15	15	25
Summer (J.J.A.)	12,162,000	50	34	51	55	41
Fall (S.O.N.)	4,935,000	20	29	16	23	28
Total 1981[6]	24,474,000	100	100	100	100	100
Expenditures	24,474,000		3,255,000	13,047,000	7,406,000	766,000
Percent Horizontal	100		13	53	31	3

See footnotes 1 thru 5 on Table 3.

[6] Expenditures include $944,000 in taxes paid by all tourist owners of second homes and recreational properties located on the North Shore. This amount is distributed seasonally and by home location according to statistics of second home use on the North Shore.

TABLE 11. AVERAGE TOURIST EXPENDITURE PER PERSON-TRIP ON THE NORTH SHORE, BY HOME LOCATION AND SEASON, 1981

Season[1/]	All Tourists	Location of Tourists Homes			
		Vicinity[2/]	Distant MN[3/]	Other States[4/]	Canada[5/]
	$	$	$	$	$
Winter (D.J.F.)	15.70	3.50	38.40	36.50	4.50
Spring (M.A.M.)	13.80	5.00	21.10	45.20	8.80
Summer (J.J.A.)	22.30	5.50	34.90	31.50	13.10
Fall (S.O.N.)	15.60	4.90	28.00	46.30	13.70
All 1981[6/]	17.90	4.90	31.20	36.20	10.80

See footnotes 1 thru 5 from Table 3.

[6/] Average include $944,000 in taxes paid by all tourist owners of second homes and recreational properties located on the North Shore. This amount is distributed seasonally and by home location according to statistics of second home use on the North Shore.

TABLE 12. NORTH SHORE OVERNITE LODGING SERVICES BY SEGMENTS OF THE SHORE AND LODGING TYPE 1982[1]

	Motels, Resorts, Condos[2]			Campgrounds	
Shore Segment	Number Operations	Cabins	Rooms	Number Operations[3]	Campsites
1. Scenic 61	20	117	92	6	252
2. Two Harbors	5	4	44	1	80
3. Gooseberry	14	96	40	4(3)	151
4. Split Rock/Silver Bay	9	52	47	4(1)	119
5. Lutsen/Tofte	26	220	164	4(1)	149
6. Grand Marais	24	78	181	2(1)	171
7. & 8. Hovland/Grand Portage[4]	13	51	143	6(4)	143
Total	111	618	711	27(10)[3]	1065

Footnotes:

[1] Data obtained by use of existing data and interviews with a sampling of operators in each segment. Data are estimates not a complete census.

[2] Condominium units are counted as "cabins". Only the Lutsen-Tofte segment had condominiums available in 1982. Rooms refer to single motel/hotel type rental rooms. Many operators offer both cabins and rooms for rent.

[3] The parenthetical numbers indicates the number of campgrounds operated in combination with resorts. Campground data includes those operated by governmental agencies as well as private commercial operators.

[4] Grouped to avoid disclosure of data of individual operations.

TABLE 13. PERSONAL CHARACTERISTICS OF NORTH SHORE TOURISTS: EDUCATION, OCCUPATION, HOUSEHOLD INCOME[1]

	North Shore Tourist Segment[2]		Compared With:
Years of Formal Education	Summer Tourists[2]	Lodging Guests[2]	U.S. Population 1981[3]
	%	%	%
0-8 years completed	3	2	16
9-12 years completed	22	19	51
13-16 years completed	42	38	33
17 or more years	33	41	
	100	100	100
Occupation			U.S. Population 1979[4]
Professional/Managerial	31	56	26
Skilled Worker	17	12	31
Retired	14	11	10
All Others	38	21	33
	100	100	100
Annual Household Income			U.S. White Households 1981[5]
Under $15,000 per year	13	10	28
$15,000 - $19,999	11	8	12
$20,000 - $24,999	17	17	13
$25,000 - $34,999	26	29	21
$35,000 - $49,999	16	21	16
$50,000 and over	17	15	10
	100	100	100

Footnotes:

[1] Data are in terms of parties. Nearly all responses were from the head of the household.

[2] Summer tourists sampled for this information were those who had a major experience on the North Shore. Most of those from within 50 miles and others who did not stay overnite are not included.

[3] Source: Current Population Report, Series P-20, No. 371 Household and Family Characteristics, March 1981.

[4] Percentages are determined by special calculations, since retirees are ordinarily not included with statistics of the work force.

[5] Source: Current Population Report, Series P-60, No. 134 Money Income and Poverty Status of Families and Persons in the U.S., 1981. Comparison is with white households only.

TABLE 14. SELECTED TRAVEL PATTERNS OF NORTH SHORE TOURISTS, 1981

Distribution By Frequency of Travel To The North Shore (Summer Tourists)[1/]

Frequency of Travel	Percentage
First trip	6
First trip in last 5 years	21
1 to 5 trips, last 5 years	46
6 or more trips, last 5 years	27
TOTAL	100%

Distribution by Distance of Travel Up The Shore (Summer Tourists)[1/]

Distance Traveled up Shore	Percentage
Not beyond MN #1	30
Beyond MN #1	70
TOTAL	100%

Distribution by Number of Visits in 1981 (Cook County Lodging Guests)

Number of 1981 Visits	Percentage
One visit only	68
2 visits	15
3 visits	7
4 visits	5
5 or more visits	5
TOTAL	100%

1/ Summer tourists sampled for this information were those who had a major experience on the North Shore. Most of those within 50 miles (vicinity) and others who did not stay overnite are not included.

TABLE 15. SELECTED LENGTH OF STAY DATA, NORTH SHORE TOURISTS, 1981

Class	Average Days on North Shore
All Summer Tourists	2.51
Summer Tourists Staying Overnight	3.64
Tourists in Cook County Lodging Facilities, all	3.57
By Season	
Winter	3.88
Spring	3.88
Summer	3.60
Fall	3.22
By Type of Lodging Facility	
Motel	2.93
Resort	4.06
Campground	4.65
Condominium	3.87

Note: Average nites spent would be one less than figures in the tables. Thus all summer tourists spent 2.51 days on the average and were there and average of 1.51 nites. That is, each part of a different day counts as a whole day.

TABLE 16. HOLDING OF RECREATIONAL AND SECOND HOME PROPERTIES BY NON-RESIDENTS (TOURISTS) ON THE NORTH SHORE, WITH RESIDENT OWNER COMPARISONS, 1981 1,2/

Owner's Residence	Number of Owners	Ownership's with Buildings	Acres Owned	Market Value	Estimated Taxes 3/
All Tourist Owners	1,541	845	18,900	$52,800,000	$ 944,000
Minnesota Residents	1,103	696	14,000	37,800,000	683,500
Residents of other North Central Midwestern States	238	132	2,800	10,400,000	176,900
Residents living outside North Central Region	200	67	2,000	4,600,000	83,600
Local Owners	616	195	10,900	8,200,000	145,800
All Owners	2,157	1,090	29,800	61,000,000	1,089,800

1/ Source - Tabulated from land ownership lists of Lake and Cook Counties. A small number of North Shore properties in St. Louis County are not included in this data.

2/ Definitions:-

North Shore - All land lying with approximatelyfive to eight miles of Lake Superior. Data are tabulated by townships, hence, the width varies.

Recreational & Second Home Property - Includes only non-homesteaded land.

Resident Owners - Are owners living within the county in which the land is located (but these owners are not living on the given property).

Tourist Owners - Includes all owners not living in the county where the land is located. These are tourists by the general definitions used in this study, except that an estimated 1.5 percent live in another North Shore county.

3/ Taxes estimated by multiplying market values by tax rates: 0.0226086 in Lake County, 0.0162687 in Cook County. Note that this includes all recreational and second home properties. Forty-two percent of these properties do not have second homes on them.

TABLE 17. SELECTED OWNERSHIP AND USE CHARACTERISTICS OF NON-RESIDENT NORTH SHORE SECOND HOME OWNERS, BY HOME LOCATION, 1981

Characteristics	All Owners	All Minnesota	TCMA	Duluth	Other States
		Owners' Home Locations			
Land with Water Frontage					
- percent having frontage (%)	80%	79%	82%	74%	82%
- average frontage of properties on water (feet)	613	503	550	412	993
Length of ownership (years)	18	14	13	15	34
Usage of Properties					
- average days	76	66	69	62	110
- average number of people	3.7	3.5	3.4	3.7	4.2
- average people-days	282	232	235	228	457
- total people-days	252,500	161,700	102,900	27,500	90,800
- percent distribution of use (%)	100%	64%	41%	11%	36%
Number of Owners	895	696 1/	438	125	199

1/ Minnesota owners include 133 "others" in addition to the 438 Twin City (TCMA) and 125 "Duluth & vicinity" owners.

TABLE 18. EXPENDITURE PATTERNS OF TOURIST OWNERS OF SECOND HOMES ON THE NORTH SHORE, BY RESIDENCE OF OWNERS, 1981

Type of Expenditure	All Tourist Owners			Location of Owner's Residence							
	Dollars		% of Total	All MN		Twin Cities		Other MN		Rest of U.S. 2/	
	Total	per home average		per home average	% of total	per home average	% of total	per home average	% of total	per home average	% of total
Spent on home	$1,491,600	$1,666	65	$ 1,086	70	$ 1,151	67	$ 977	79	$ 3,696	61
Taxes 1/	534,400	597	23	467	30	525	30	368	30	1,052	17
Maintenance	418,300	467	18	172	11	180	11	159	13	1,500	25
Utilities	315,300	352	14	285	18	296	17	266	21	588	10
New Additions	223,600	250	10	162	11	150	9	184	15	556	9
Spent for Living	786,700	879	35	461	30	579	33	265	21	2,333	39
Groceries	387,900	433	17	200	13	284	16	58	5	1,248	21
Restaurant	154,800	173	7	96	6	119	7	57	4	442	7
Recreation	10,600	12	2/	6	2/	7	2/	4	2/	32	1
Transportation	158,300	177	7	106	7	127	7	72	6	422	7
Fishs	4,500	5	2/	3	2/	5	2/	1	2/	11	2/
Retail & Misc.	70,600	79	3	50	3	37	2	73	6	178	3
Averages Per Home		2,545		1,547		1,730		1,242		6,029	
Total Dollars Spent	2,278,300		100	1,078,400	100	757,800	100	320,600	100	1,199,900	100
Percentage of Total (horizontal)	100			47		33		14		53	
Taxes Paid by Residential Property owners 1/	409,600			358,500		251,800		106,700		51,100	
Total	2,687,900	NA		1,436,900		1,009,600		427,300		1,251,000	
Percentage of total (horizontal)	100			54		38		16		46	

1/ Taxes shown in the second row from the top are those paid by owners of tourists' second homes. The tax figures on the third row from the bottom are those taxes paid by owners of recreational property on the North Shore without buildings. Note that these tax figures total to $944,000. This is the same sum shown in the top row of the right hand column of Table 1.

* Values here are less than 0.5%. Because of the omission of these values some percentage columns do not total to 100 %.

2/ "Rest of U.S." includes owners who are residents of states other than Minnesota.

TABLES 19. RATING OF SELECTED FEATURES OF THE NORTH SHORE BY TOURIST SECOND HOME OWNERS ACCORDING TO THEIR CONTRIBUTION TO THE OWNERS' RECREATIONAL EXPERIENCE, 1981. 1/

	Home Location of Second Home Owner				
Feature	All Owners	All MN 2/	TCMA	Duluth	Other States
	Rating	Rating	Rating	Rating	Rating
Lake Superior and its shoreline	93	91	98	80	100
Overall "North Woods"	89	88	91	83	94
Rivers & Streams in the area	60	64	64	63	45
Towns along the Shore and their urban facilities	51	44	48	26	78
Nearby Inland Lakes	48	51	45	61	40
Number of Second Homes Owners	895	696	438	125	199

1/ Rating is on a scale of 0 to 100. 0 is equivalent to "little or no positive contribution"; 50 is equivalent to "some positive contribution"; 100 is equivalant to "much positive contribution".

2/ Owners living in the Twin Cities (TCMA) and Duluth are included in the "All Minnesota" category plus 133 other owners. (Duluth - 125, plus TCMA - 438, plus others - 133,equals all Minnesota - 696).

TABLE 20. MOST IMPORTANT NORTH SHORE RECREATIONAL ACTIVITIES OF TOURIST SECOND HOME OWNERS. PERCENT DISTRIBUTION BY HOME LOCATION, 1981.

Rec Activity	All Owners	All MN 1/	Home Location TCMA	Duluth	Other States
Water Sports	3	4	5	2	0
Hunt/Fish	19	24	14	40	0
Enjoy Outdoors 2/	62	57	62	50	80
Indoor (reading,relaxing)	3	4	5	2	0
Visit Friends and Relatives	11	11	14	6	10
Local Community Recreation 3/	2	0	0	0	10
Total Responses 4/					
percent	100	100	100	100	100
number	940	722	441	281	220
Number of Owners	895	696	438	125	199

1/ Minnesota owners includes 133 others in addition to the 438 in the Twin Cities (TCMA) and the 125 in Duluth & vicinity.

2/ Enjoy outdoors - includes a general complex of activities in the North Shore setting plus taking pleasure in the general ambience.

3/ Local community activities include theatre, bowling, eating out, use of municipal swimming pools, shopping and related urban activities.

4/ A limited number of multiple responses allowed.

TABLE 21. VEHICLE-TRIPS, PERSON-TRIPS, AND PERSON-DAYS OF SUMMER TOURISTS ON THE NORTH SHORE BY HOME LOCATION, 1981 1/

Home Location	Vehicle-Trips Number	%	Average Persons Per Vehicle	Person-Trips Number	%	Average Length of stay	Person-Days Number	%
	#	%	persons	#	%	days	#	%
Vicinity 2/	99,900	45	2.0	199,800	37	1.16	231,000	17
Distant MN 3/	66,000	30	2.9	191,400	35	3.29	630,000	46
Wisconsin	8,200	4	2.9	23,800	4	2.93	70,000	5
Iowa/Dakotas	7,500	3	3.5	26,300	5	3.79	100,000	7
Industrial MW 4/	11,900	5	3.0	35,700	7	4.26	152,000	11
Other U.S. 5/	16,500	8	2.6	42,900	8	3.52	151,000	11
Canada	10,600	5	2.3	24,400	4	1.34	33,000	3
All Locations	220,600	100	2.5	544,300	100	2.51	1,367,000	100

1/ Source: A random sample of North Shore summer highway travelers.

2/ Vicinity includes non-resident travelers of the North Shore who resides within fifty miles (Residents of Superior, Wisconsin are included here and excluded from the Wisconsin data).

3/ Distant Minnesota includes all beyond 50 miles of the North Shore.

4/ Industrial Midwest Includes the States of Illinois, Indiana, Michigan, & Ohio.

5/ Other U.S. includes residents of all states not in the preceding five classifications.

TABLE 22. EXPENDITURE PATTERNS OF NORTH SHORE SUMMER TOURISTS BY HOME LOCATION: TOTAL AND AVERAGES PER VEHICLE-TRIP, PERSON-TRIP, AND PERSON-DAY, 1981 [1/]

Tourists Home Locations	Total Expenditures		Average Expenditures		
	dollars	percent	vehicle trip	person trip	person day
	$	%	$	$	$
Vicinity [2/]	1,065,000	9	10.60	5.40	4.60
Distant MN [3/]	6,206,000	54	94.00	32.40	9.90
Wisconsin [3/]	556,000	5	67.80	23.40	8.00
Iowa/Dakotas	626,000	6	83.40	23.80	6.20
Industrial Midwest [4/]	1,159,000	10	97.40	32.50	7.60
Other U.S. [5/]	1,514,000	13	91.70	35.30	10.00
Canada	319,000	3	30.10	13.10	9.80
All Home Locations	11,445,000 [6/]	100	51.90	21.00	8.40

See Table 21 for footnotes 1 to 5.

6/ Expenditures do not include $717,000 in taxes on tourist-owned recreational property that is prorated to summer expenditures. See footnote 6 of Table 10.

TABLE 23. EXPENDITURE PATTERNS OF NORTH SHORE SUMMER TOURISTS BY TYPE OF EXPENDITURE: TOTAL AND AVERAGES PER VEHICLE-TRIP, PERSON-TRIP, AND PERSON-DAY, 1981 1/

Type of Expenditure	Total Expenditures		Average Expenditure		
	dollars	percent	vehicle trip	person trip	person day
	$	%	$	$	$
Food & Beverage	4,189,000	37	19.00	7.70	3.10
Lodging	3,822,000	33	17.30	7.10	2.80
Transportation	1,797,000	16	8.20	3.30	1.30
Recreation	263,000	2	1.20	0.50	0.19
Shopping	1,282,000	11	5.80	2.40	0.90
Other	92,000	1	0.40	0.20	0.07
TOTAL	11,445,000 3/	100	51.90	21.20	8.40

1/ Source: A random sample of North Shore highway travelers.

2/ Totals of average expenditures may not always add due to rounding.

3/ Expenditures do not include $717,000 in taxes on tourist-owned recreational property that is prorated to summer expenditures. See footnote 6 to Table 10.

TABLE 24. VEHICLE-TRIPS, PERSON-TRIPS, AND PERSON-DAYS OF SUMMER TOURISTS ON THE NORTH SHORE BY MAJOR PURPOSE OF TRAVEL ON THE NORTH SHORE, 1981 1/

Types of Major Purposes 2/	Vehicle-Trips		Average persons	Person-Trips		Average Length	Person-Days	
	Number	%	Per Vehicle	Number	%	of stay	Number	%
	#	%	persons	#	%	days	#	%
Work	27,600	13	2.0	54,600	10	1.30	71,000	5
Visit Friends & Relatives	10,600	5	2.5	26,600	5	4.16	111,000	8
Recreation	136,100	62	2.7	364,200	67	2.91	1,059,000	78
Personal	31,700	14	2.0	64,300	12	1.34	87,000	6
Pass Thru	13,700	6	2.4	32,800	6	1.09	36,000	3
Other	900	*	2.0	1,800	*	1.88	3,000	*
All purposes	220,600	100	2.5	544,300	100	2.51	1,367,000	100

1/ Source: A random sample of North Shore highway travelers.

2/ Tourists identified their major reason for travel to or on the North Shore. However, most are involved in activities that could be classed in more than one of the purpose types.

* Less than 0.5 percent

TABLE 25. EXPENDITURES OF NORTH SHORE SUMMER TOURISTS BY MAJOR PURPOSE FOR TRAVEL ON THE NORTH SHORE: TOTAL AND AVERAGES PER VEHICLE-TRIP, PERSON-TRIP, AND PERSON-DAY, 1981 1/

Type of Major Purposes 2/	Total Expenditures dollars	percent	Average Expenditure vehicle trip	person trip	person day
	$	%	$	$	$
Work	276,000	2	9.90	5.10	3.90
Visit Friends and Relatives	355,000	3	33.50	13.30	3.20
Recreation	10,200,000	89	75.00	28.00	9.60
Personal	482,000	4	15.20	7.50	5.50
Pass Thru	126,000	1	9.20	3.80	3.50
Other	6,000	*	7.00	3.50	1.80
All Purposes 3/	11,445,000	100	51.90	21.20	8.40

1/ Source: A random sample of North Shore highway travelers.

2/ Tourists identified their major reason for travel to or on the North Shore. However, most are involved in activities that could be classed in one or more of the purpose types.

3/ Expenditures do not include $717,000 in taxes on tourist-owned recreational property that is prorated to summer expenditures. See footnote 6 to Table 10.

* Less than 0.5 percent. Because of this omission and rounding, the percentage column adds to 99.

TABLE 26. VEHICLE-TRIPS, PERSON-TRIPS, AND PERSON-DAYS OF SUMMER TOURISTS ON THE NORTH SHORE BY PRINCIPLE MEANS OF LODGING, 1981 1/

Lodging Type 2/	Vehicle-Trips Number	%	Average persons Per Vehicle	Person-Trips Number	%	Average Length of stay	Person-Days Number	%
	#	%	persons	#	%	days	#	%
Not Overnite	116,900	53	2.0	233,000	43	1.00	233,000	17
Total Overnite 3/	103,700	47	3.0	311,300	57	3.64	1,134,000	83
Commercial Room 4/	47,700	22	3.0	145,500	27	3.35	488,000	36
Camp	29,600	13	3.1	92,900	17	3.83	356,000	26
Second Home	11,800	5	2.7	32,200	6	6.27	202,000	15
Friends and Relatives	14,600	7	2.8	40,700	7	2.17	88,000	6
All Lodging Types	220,600	100	2.5	544,300	100	2.51	1,367,000	100

1/ Source: A random sample of North Shore highway travelers.

2/ Tourists are classed by principal lodging types reported. However, over one-fourth of all tourists indicated use of more than one lodging type on a given trip.

3/ "Total overnite" includes all of the four categories that follow below it.

4/ "Commercial room" includes those reporting motels/hotels, resorts and rental condominiums as their principal lodging.

TABLE 27. EXPENDITURE PATTERNS OF NORTH SHORE SUMMER TOURISTS BY PRINCIPLE MEANS OF OVERNITE LODGING: TOTAL AND AVERAGES PER VEHICLE-TRIP, PERSON-TRIP, AND PERSON-DAY, 1981 1/

Type of Lodging 2/	Total Expenditures dollars	percent	Average Expenditure vehicle trip	person trip	person day
	$	%	$	$	$
Not Overnite	687,000	6	5.90	2.90	2.90
Commercial Room 3/	6,197,000	54	129.90	42.60	12.70
Camp	2,281,000	20	77.00	24.50	6.40
Second Home 4/	1,495,000	13	126.70	46.40	7.40
Friends & Relatives	785,000	7	53.80	19.40	8.90
Total	11,445,000	100	51.90	21.20	8.40

1/ Source: A random sample of North Shore highway travelers.

2/ Tourists are classed by principal lodging types reported. However, over one-fourth of all tourists indicated use of more than one lodging type on a given trip.

3/ "Commercial room" includes those reporting motel/hotels, resorts, or rental condominiums as their principal lodging.

4/ Data in the table for Second Houses does not include $717,000 in property taxes allocated to summer expenditures. If this expenditure is included the figures for second homes becomes: Total - $2,192,000; average per vehicle trip - $185.80; average per person-trip - $68.10; average per person-day - $10.60. Second home data will be noted to approximate but are not precisely the same as given in Tables 7, 8, and 9 since apparently some tourists traveling on the highway reported use of second homes not owned by them.

TABLE 28. EXPENDITURE PATTERNS OF NORTH SHORE SUMMER TOURISTS: TYPES OF EXPENDITURE BY MAJOR PURPOSES FOR TRAVEL ON THE NORTH SHORE, 1981.[1]

Type of Expenditure	Total Dollars	%	Purposes for North Shore Travel [2] Work	Visit F&R	Pleasure	Personal	Pass Thru
	%	%	%	%	%	%	%
Food & Beverage	4,189,000	37	31	35	36	44	49
Lodging	3,822,000	33	33	26	35	10	*
Transportation	1,797,000	16	32	20	15	13	37
Recreation	263,000	2	3	12	2	10	10
Shopping	1,282,000	11	1	7	11	19	1
Other	92,000	1	*	*	1	4	3
Total Expenditure	11,445,000[2]	100	100	100	100	100	100
Dollars by Purpose	11,445,000	--	276,000	355,000	10,200,000	482,000	126,000
Percent Horizontal	100		2	3	89	4	1

1/ Source: A random sample of North Shore summer highway travelers.

2/ Tourists identified their major reason for travel to or on the North Shore. However, most are involved in activities that could be classed in more than one of the purpose types. An "other" purpose type is omitted having estimated total expenditures of $6,000, see table 25. The horizontal sum is short by this amount.

3/ Expenditures do not include $717,000 in taxes on tourist-owned recreational property that is prorated to summer expenditures. See footnote 6, table 10.

* Less than 0.5 percent. Percentages may not add to 100 because of rounding and this omission.

TABLE 29. EXPENDITURE PATTERNS OF NORTH SHORE SUMMER TOURISTS: TYPES OF EXPENDITURE BY PRINCIPLE MEANS OF LODGING, 1981.1/

Type of Expenditure	Total Dollars	Total %	Principle Means of Lodging 2/ Not overnite	Commercial room	Second Home	Camp	Friends & relatives
	%	%	%	%	%	%	%
Food & Beverage	4,189,000	37	57	30	46	36	43
Lodging	3,822,000	33	0	43	23	28	20
Transportation	1,797,000	16	24	12	18	18	20
Recreation	263,000	2	5	3	1	5	2
Shopping	1,282,000	11	11	11	10	13	14
Other	92,000	1	3	1	2	*	1
Total 3/	11,445,000	100	100	100	100	100	100
Dollars by Lodging	11,445,000	--	687,000	6,197,000	1,495,000	2,281,000	785,000
Percent Horizontal	100		6	54	13	20	7

1/ Source: A random sample of North Shore summer highway travelers.

2/ Tourists are classed by principal lodging reported. However, over one-fourth of all tourists indicated use of more than one lodging type on a given trip.

3/ Expenditures do not include $717,000 in taxes on tourist-owned recreational property that is prorated to summer expenditures. See footnote 6, table 10

* Less than 0.5 percent. Percentages may not add to 100 because of rounding and this omission.

TABLE 30. ATTITUDES OF SUMMER TOURISTS TO NORTH SHORE TOWARD SELECTED HOSPITALITY FEATURES, BY INCOME LEVELS, 1981.[1/]

Attitudes Toward Lodging Accomodations

Income Level	Total	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Proportion applied to
Under $20,000	100	0	6	5	41	48	40
$20 - 35,000	100	2	7	0	47	44	55
over $35,000	100	0	0	15	24	61	66
All	100	1	4	7	38	50	55

Attitudes Toward Quality of Food Services

Income Level	Total	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Proportion applied to
Under $20,000	100	0	4	4	58	35	57
$20 - 35,000	100	3	3	5	20	69	44
over $35,000	100	4	0	8	23	65	48
All	100	2	2	6	32	58	49

Hospitality of Lodging People With Whom They Dealt

Income Level	Total	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Proportion applied to
Under $20,000	100	0	0	26	50	24	53
$20 - 35,000	100	6	6	8	27	53	55
over $35,000	100	0	0	8	22	70	68
All	100	2	2	12	30	54	59

[1/] Source: Survey of random sample of North Shore summer highway travelers.

TABLE 31. ATTITUDES OF SUMMER TOURISTS TO THE NORTH SHORE TOWARD SELECTED HOSPITALITY FEATURES BY DISTANCE TRAVELED UP THE SHORE, 1981.[1/]

Attitudes Toward Lodging Accomodations

Distance up North Shore	Total	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Proportion applied to
Not Beyond MN #1	100	0	16	26	16	42	25
Beyond MN #1	100	1	1	1	43	54	62
All	100	1	3	4	39	53	52

Attitudes Toward Quality of Food Services

Distance up North Shore	Total	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Proportion applied to
Not Beyond MN #1	100	6	6	25	25	38	32
Beyond MN #1	100	3	1	2	30	64	53
All	100	3	2	6	29	60	47

Hospitality of Lodging People With Whom They Dealt

Distance up North Shore	Total	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Proportion applied to
Not Beyond MN #1	100	0	0	26	40	34	50
Beyond MN #1	100	3	3	8	30	56	60
All	100	2	2	13	33	50	57

1/ Source: Survey of random sample of North Shore summer highway travelers.

TABLE 32. ATTITUDES OF SUMMER TOURISTS TO THE NORTH SHORE TOWARD SELECTED HOSPITALITY FEATURES BY WHETHER OR NOT THEY STAYED OVERNITE, 1981.[1/]

Attitudes Toward Lodging Accomodations

Overnite or Not	Total	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Proportion applied to
Overnite	100	2	0	3	46	49	67
Not Overnite	100	0	10	12	26	52	41
All	100	1	4	7	38	50	55

Attitudes Toward Quality of Food Services

Overnite or Not	Total	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Proportion applied to
Overnite	100	4	0	4	28	64	49
Not Overnite	100	2	4	7	34	53	48
All	100	2	2	6	32	58	49

Hospitality of Lodging People With Whom They Dealt

Overnite Or Not	Total	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Proportion applied to
Overnite	100	3	0	12	36	49	74
Not Overnite	100	0	5	10	30	54	46
All	100	2	2	11	34	51	60

1/ Source: Survey of random sample of North Shore summer highway travelers.

TABLE 33. ATTITUDES OF SUMMER TOURISTS TO THE NORTH SHORE TOWARD SELECTED HOSPITALITY FEATURES BY FREQUENCY OF PREVIOUS VISITS HERE, 1981. 1/

Attitudes Toward Lodging Accomodations

Previous Experience on North Shore	Total	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Proportion applied to
First Trip	100	0	20	0	17	63	45
First Trip in 5 years	100	0	6	16	54	24	48
1 to 5 Trips, last 5 years	100	0	4	6	38	52	59
6 & over Trips, last 5 years	100	4	0	4	29	63	49
All	100	1	4	7	38	50	44

Attitudes Toward Quality of Food Services

Previous Experience on North Shore	Total	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Proportion applied to
First Trip	100	0	12	28	22	38	76
First Trip in 5 years	100	0	0	0	48	52	51
1 to 5 Trips, last 5 years	100	5	2	4	14	75	45
6 & over Trips, last 5 years	100	4	0	5	48	43	47
All	100	3	2	6	31	58	49

Hospitality of Lodging People With Whom They Dealt

Previous Experience on North Shore	Total	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Proportion applied to
First Trip	100	0	0	0	34	66	59
First Trip in 5 years	100	0	0	19	14	67	69
1 to 5 Trips, last 5 years	100	5	4	11	27	53	62
6 & over Trips, last 5 years	100	0	0	8	63	29	51
All	100	2	2	11	34	51	60

1/ Source: Survey of random sample of North Shore summer highway travelers.

TABLE 34. RATING OF NORTH SHORE FEATURES BY SUMMER TOURISTS, 1981 1/

North Shore Feature	Rating 2/ Scale 1 - 5	Percent Having the Experience
Views of Northwoods	4.8	97
Views of Inland Lakes	4.8	76
Views of Lake Superior	4.9	99
Driving the rural roads of NE Minnesota	4.3	72
Vistas from high points on scenic overlooks	4.8	90
Seeing wildlife (deer, ruffle grouse, etc.)	4.7	74
Views of local homes along the road	3.8	92
Views of sawmills/wood processing operations	3.7	66
Views of natural formations (waterfalls, seaways, etc.)	4.8	94
Views of mining activities	3.5	63
Views of small cities & towns in area	4.0	72
Observe activities of other tourists	3.4	82
Facilities to serve tourists	4.0	89
Greening of plants in the spring	4.6	49
Fall leaf colors	4.6	35
Winter scenes	4.3	23

1/ Source: a random sample of summer tourists traveling on the North Shore, but largely excluding those living within 50 miles of the North Shore and others not staying overnite. The units responding are vehicle parties.

2/ Ratings were:
1 - disliked very much;
2 - disliked;
3 - neither liked nor disliked;
4 - liked;
5 - liked very much.

The rating figure given is a weighted average of all responding to the questions.

TABLE 35

SOURCES OF INFORMATION USED BY SUMMER TOURISTS, BEFORE AND AFTER ARRIVAL ON THE NORTH SHORE, BY FREQUENCY OF TRAVEL THERE, 1981

SOURCES OF INFORMATION BEFORE ARRIVING IN NORTH SHORE

Previous Travel To The North Shore	Percent Using the Information Source															
	Percent of Tourists	Chamber of Commerce	U.S. Forest Service	Natl. Park Service	Friends & Family	Magazines	Newspaper	Radio	T.V.	Tourism Assoc.	Resort or Outfitter	Other Local Business	Sport Show	Travel Agency	Highway Info. Booth	Travel or Auto Club
Never before	5	0	0	9	62	0	21	0	0	8	0	0	0	0	0	17
Not last 5 yrs.	24	4	4	2	36	10	0	0	0	6	6	2	0	4	0	4
1-5 last 5 years	47	3	10	9	40	2	7	0	0	7	10	3	4	0	4	15
6+ last 5 yrs.	24	9	14	10	38	0	0	4	0	4	9	0	2	2	4	0
All	100	4	9	7	39	3	5	1	0	6	8	2	3	2	3	9

INFORMATION SOURCES AFTER ARRIVAL IN THE AREA

	Percent Using the Information Source														
Never before	17	17	9	17	0	21	0	0	9	8	9	0	0	19	21
Not last 5 yrs.	9	13	6	7	4	0	0	0	4	14	13	0	0	20	0
1-5 last 5 years	9	10	7	8	0	3	2	2	11	16	5	0	0	11	1
6+ last 5 yrs.	3	3	8	6	0	0	9	0	13	11	14	0	0	6	0
All	8	9	7	7	1	3	3	1	9	14	9	0	0	12	2

TABLE 36 SOURCES OF INFORMATION USED BY FALL TOURISTS, BEFORE AND AFTER ARRIVAL ON THE NORTH SHORE, BY FREQUENCY OF TRAVEL TO THE NORTH SHORE, 1981 (month of September)

SOURCES OF INFORMATION BEFORE ARRIVING ON THE NORTH SHORE

Previous Travel To The North Shore	Percent of Tourists	Percent Using the Information Source: Chamber of Commerce	U.S. Forest Service	Natl. Park Service	Friends & Family	Magazines	Newspaper	Radio	T.V.	Previous Knowledge	Tourism Assn.	Resort or Outfitter	Other Local Business	Sport Show	Travel Agency	Highway Info. Booth	Travel or Auto Club
Never before	5	0	0	0	31	0	0	0	0	0	0	0	0	0	0	0	0
Not last 5 yrs.	14	0	0	0	47	24	24	24	24	77	0	0	0	0	12	12	24
1-5 last 5 years	73	7	7	5	32	5	2	0	0	71	10	14	2	0	0	7	5
6+ last 5 yrs.	7	24	24	77	0	0	0	24	0	47	24	53	24	0	0	24	0
All	100	7	7	9	32	7	5	5	3	67	9	14	3	0	2	9	7

SOURCES OF INFORMATION AFTER ARRIVING ON THE NORTH SHORE

	Percent Using the Information Source															
Never before	0	69	0	100	0	0	0	0	0	0	0	0	0	0	0	70
Not last 5 yrs.	0	0	24	12	0	0	0	0	27	0	27	12	0	12	24	12
1-5 last 5 years	5	13	12	21	0	10	2	5	25	12	17	7	0	0	17	5
6+ last 5 yrs.	24	77	24	0	0	0	24	0	24	24	0	24	0	0	24	0
All	5	18	14	23	0	8	3	4	24	11	16	9	0	2	18	9

TABLE 37. VEHICLE TYPES USED BY NORTH SHORE SUMMER TOURISTS, 1981 1/

Type of Vehicle 2/	Percentage
Passenger Auto (includes vans)	77.5
Recreational Vehicle, Pickup Camper, Camping Trailer	12.2
Motorcycle	3.0
Truck (mostly pickups)	7.3
	100.00

1/ Source: a random sampling of North Shore summer highway tourists. Buses and heavy trucks were not included in the sample. Data are in derms of number of vehicles.

2/ Eleven percent of all tourist vehicles had some form of water craft visible: trailered or top carried, boats & canoes.

TABLE 38. TOURIST PURPOSES FOR SUMMER TRAVEL ON NORTH SHORE BY THEIR HOME LOCATION, VEHICLE TRIPS, 1981

North Shore Trip Purpose	All Summer Tourists Number	%	Home Location by Purpose on North Shore Vehicle Data Vicinity %	D.MN %	WI %	IA/Daks %	Ind. MW %	O. U.S. %	Canada %
Work	27,000	13	22	6	5	*	4	5	*
Visit	10,600	5	4	7	8	11	2	3	*
Pleasure	136,100	62	48	76	71	75	74	74	50
Personal	31,700	14	26	4	*	6	10	5	5
Pass Thru	13,700	6	*	6	16	8	10	13	40
Other	900	*	*	1	*	*	*	*	5
Total Percent		100	100	100	100	100	100	100	100
Total Vehicles	220,600	-	99,900	65,900	8,200	7,500	12,000	16,500	10,600
Percentage Horizontally	100	-	45	30	4	3	5	8	5

(For explanations see footnotes to Tables 21 and 24.)

TABLE 39. TOURIST PURPOSES FOR SUMMER TRAVEL ON NORTH SHORE BY PRINCIPAL MEANS OF LODGING, VEHICLE TRIPS, 1981

Lodging Trip Purpose	All Summer Tourists Number	%	Purpose for North Shore Visit by Lodging Means Work %	Visit %	Pleasure %	Personal %	Pass Thru %	Other %
Not Overnite	116,900	53	81	36	34	82	93	57
Commercial	46,600	21	12	9	32	5	*	*
Second Homes	11,400	5	2	4	8	*	*	*
Camp	28,900	13	*	17	20	1	3	43
Friend - Relative	14,300	7	5	34	4	10	4	*
Other	2,500	1	*	*	2	2	*	*
Total Percent		100	100	100	100	100	100	100
Total Vehicles	220,600	-	27,600	10,600	136,100	31,700	13,700	900
Percentage Horizontally	100	-	13	5	62	14	6	*

(For explanations see footnotes to Tables 21 and 24.)

TABLE 40. TOURIST'S PRINCIPAL MEANS OF LODGING ON NORTH SHORE, BY HOME LOCATION, SUMMER, VEHICLE TRIPS, 1981

Lodging Means	All Summer Tourists		Home Location by Means of Lodging						
	Number	%	Vicinity	D.MN	WI	IA/Daks	Ind. MW	O. U.S.	Canada
			%	%	%	%	%	%	%
Not Overnite	116,900	53	86	19	40	6	16	28	73
Commercial	46,600	21	6	41	20	36	22	31	17
Second Homes	11,400	5	1	9	3	6	9	16	*
Camp	28,900	13	3	20	26	44	38	19	*
Friend - Relative	14,300	7	4	9	11	8	15	5	2
Other	2,500	1	*	2	*	*	*	1	8
Total Percent		100	100	100	100	100	100	100	100
Total Vehicles	220,600	-	99,900	65,900	8,200	7,500	12,000	16,500	10,600
Percentage Horizontally	100	-	45	30	4	3	5	8	5

(For explanations see footnotes to Tables 21 and 24.)

TABLE 41. SEASONAL DISTRIBUTION OF COOK COUNTY TOURIST PARTIES STAYING OVERNITE IN PUBLIC FACILITIES BY TYPE OF LODGING FACILITY, 1981 1/

Season	Total Number	%	Motels	Type of Public Facility Resorts	Condominiums	Campgrounds 2/
	#	%	%	%	%	%
Winter	6,000	10	55	73	28	3
Spring	6,500	11	23	17	29	13
Summer	31,800	55	12	1	30	54
Fall	13,900	24	10	9	13	30
Total Percent	58,200	100	100	100	100	100
Total Parties	58,200	-	29,200	10,500	7,100	11,400
Percentage horizontally	100	-	50	18	12	20

1/ Source: survey of random sample of parties registered in Cook County public overnite facilities. In some cases parties are larger than one that might travel in a passenger automobile. Excluded are tourists who stayed with friends and relatives and in second homes and who do not stay overnite.

2/ Campgrounds include private, for-profit campgrounds, municipal and state operated campgrounds.

TABLE 42. SEASONAL DISTRIBUTION OF COOK COUNTY TOURIST PARTIES STAYING OVERNITE IN PUBLIC FACILITIES BY MAJOR PURPOSE FOR TRAVEL, 1981 1/

Season	Total		Major Travel Purposes					
	Number	%	Work	Recreation 2/	Sightsee 2/	Visit F&R	Pass Thru	Personal & Other
	#	%	%	%	%	%	%	%
Winter	6,000	10	4	18	*	*	*	*
Spring	6,500	11	23	11	8	6	17	13
Summer	31,800	55	46	47	62	84	79	59
Fall	13,900	24	27	24	30	10	4	19
Total Percent	58,200	100	100	100	100	100	100	100
Total Parties	58,200	-	2,500	31,650	15,070	1,290	3,490	4,200
Percentage horizontally	100	-	4	55	26	2	6	7

1/ Source: survey of random sample of parties registered in Cook County public overnite facilities. In some cases parties are larger than one that might travel in a passenger automobile. Excluded are tourists who stayed with friends and relatives and in second homes and who do not stay overnite.

2/ Both recreation and sightseeing may be considered as recreation. They were separated in order to show the importance of sightseeing on the North Shore and the difference in their seasonal patterns.

3/ Personal and other includes all personal business other than to earn a living such as shopping and miscellaneous travel purposes.

* Fewer than 0.5 percent.

TABLE 43. PROPORTION ON VACATION OF COOK COUNTY TOURIST PARTIES STAYING OVERNITE IN PUBLIC FACILITIES BY SEASON, 1981 1/

Season	Type of Cook County Lodging Facility: Grand Marais Motels	All other public overnite facilities 2/
	%	%
Winter	60	86
Spring	80	79
Summer	85	91
Fall	82	85
TOTAL	82	88

1/ Source: survey of random sample of parties registered in Cook County public overnite facilities. In some cases parties are larger than one that might travel in a passenger automobile. Excluded are tourists who stayed with friends and relatives and in second homes and who do not stay overnite.

2/ Includes resorts, motels outside of Grand Marais, rental condominiums, and campgrounds (both private commercial and governmental agency campgrounds).

3/ Combined proportion on Vacation in Cook County entire year was 86 percent.

TABLE 44. HOME LOCATIONS OF COOK COUNTY TOURIST PARTIES STAYING OVERNIGHT IN PUBLIC FACILITIES, ALL YEAR AND WINTER SEASON, 1981 1/

Home Location	All 1981	Winter Season 2/
	%	%
Twin Cities Metropolitan Area 3/	40	50
Twin Cities Exurban Area 4/	16	21
Duluth 5/	4	4
All other Minnesota	12	3
Wisconsin	8	7
Industrial Midwest 6/	7	0
Agricultural Midwest 7/	4	2
All other U.S. 8/	5	2
Canada	4	11
Total Percent	100	100
Number of Parties	58,200	6,000

1/ Source: survey of random sample of parties registered in Cook County public overnight facilities. In some cases parties are larger than one that might travel in a passenger automobile. Excluded are tourists who stayed with friends and relatives and in second homes and who do not stay overnight.

2/ Winter Season includes the months of January, February, and December 1981.

3/ Twin Cities Metropolitan Area includes the seven counties TCMA in Minnesota.

4/ Twin Cities Exurbans include those living outside the seven metropolitan counties and within Minnesota in an area about 70 miles from its center, but excluding St. Cloud, Mankato, and Rochester.

5/ Duluth: those living within 50 miles of the North Shore on its southwest end.

6/ Industrial Midwest: states of Illinois, Indiana, Michigan, and Ohio.

7/ Agricultural Midwest: states of MO, KS, NB, IA, ND, and SD.

8/ All Other: states of U.S. outside the 12 North Central states included above.

TABLE 45. EXPENDITURE PATTERNS OF COOK COUNTY TOURIST PARTIES WHO STAYED OVERNIGHT IN PUBLIC FACILITIES, BY HOUSEHOLD INCOME CLASSES, 1981 1/

Type of Expenditure	Average of all income classes		Household Income Class				
			Under $20,000	$20-24,999	$25-34,999	$35-49,999	$50,000 & over
	$	%	%	%	%	%	%
Transportation	31.90	14	17	17	16	13	10
Lodging	79.80	36	34	35	35	37	40
Food & Beverage	59.40	27	29	33	24	28	21
Lodging, Food, and Beverage 2/	13.00	6	5	3	5	6	9
Fishing	3.40	2	2	1	2	2	1
Outfitting & Rentals	4.60	2	2	*	2	2	5
Winter Sports	7.40	3	2	3	2	3	8
Other Rental Purchases	21.40	10	9	8	14	9	6
Total Percent	-	100	100	100	100	100	100
Total Dollar Average Per Party	220.90	-	173.90	192.00	187.10	269.20	304.20
Number of Parties in each income class	58,200	-	10,600	9,600	16,700	12,500	8,800
Percentage	100	-	18	17	29	21	15

1/ Source: survey of random sample of parties registered in Cook County public overnite facilities. In some cases parties are larger than one that might travel in a passenger automobile. Excluded are tourists who stayed with friends and relatives and in second homes and who do not stay overnite.

2/ This expenditure class is provided for tourists who are charged for all food and lodging with one bill as in an American Plan Resort.

TABLE 46. WINTER EXPENDITURE PATTERNS OF COOK COUNTY TOURIST PARTIES STAYING OVERNIGHT IN PUBLIC FACILITIES BY TYPE OF LODGING FACILITY, 1981 1/

Type of Expenditure	Average of all Winter Tourist Parties		Type of Lodging Facility: Motels	Type of Lodging Facility: Resorts and Rental Condos 2/
	$	%	%	%
Transportation	29.00	9	10	7
Lodging	156.60	46	44	49
Food & Beverage	79.20	23	28	21
Lodging, Food, and 3/ Beverage	15.70	5	8	1
Fishing	-	*	*	*
Outfitting & Rentals	-	*	*	*
Winter Sports	52.50	15	7	20
Other Rental Purchases	7.80	2	3	2
Total Percent	$2,043,000	100	100	100
Total Dollar Average Per Party	$341.00	-	$252.00	$658.00

1/ Source: survey of random sample of parties registered in Cook County public overnight facilities. In some cases parties are larger than one that might travel in a passenger automobile. Excluded are tourists who stayed with friends and relatives and in second homes and who do not stay overnight.

2/ Resorts and rental condominiums are groups to gain statistical significance. Many more winter parties reported using condos compared to resorts.

3/ This expenditure class reports expenditures of tourists who are charged for all food & lodging with one bill as in an American Plan Resort, and as a convenience in making estimates of living expenditures.

* Less than 0.5%, total may not add to 100% because of this omission.

TABLE 47. SPRING EXPENDITURE PATTERNS OF COOK COUNTY TOURIST PARTIES STAYING OVERNIGHT IN PUBLIC FACILITIES BY TYPE OF LODGING FACILITY, 1981 1/

Type of Expenditure	Average of all Spring Tourist Parties		Type of Lodging Facility			
			Motels	Resorts	Rental Condos	Camp
	$	%	%	%	%	%
Transportation	32.90	13	14	8	9	19
Lodging	95.70	37	38	28	47	26
Food & Beverage	68.00	26	36	21	11	30
Lodging,Food,& Beverage 2/	14.80	6	3	21	4	7
Fishing	7.60	3	1	8	2	7
Outfitting & Rentals	2.30	1	*	*	3	*
Winter Sports	16.80	7	3	*	19	*
Other Rental Purchases	18.40	7	5	14	5	11
Total	$1,668,000	100	100	100	100	100
Total Dollar Average Per Party	$257.00	-	$231.00	$171.00	$486.00	$212.00

1/ Source: survey of random sample of parties registered in Cook County public overnight facilities. In some cases parties are larger than one that might travel in a passenger automobile. Excluded are tourists who stayed with friends and relatives and in second homes and who do not stay overnight.

2/ See footnote #3 to table 46.

* Less than 0.5%, total may not add to 100% because of this omission.

TABLE 48. SUMMER EXPENDITURE PATTERNS OF COOK COUNTY TOURIST PARTIES STAYING OVERNIGHT IN PUBLIC FACILITIES BY TYPE OF LODGING FACILITY, 1981 1/

Type of Expenditure	Average of all Summer Tourist Parties		Type of Lodging Facility			
			Motels	Resorts	Rental Condos	Camp
	$	%	%	%	%	%
Transportation	31.80	16	18	13	10	25
Lodging	62.90	34	31	40	45	17
Food & Beverage	53.40	28	31	24	24	35
Lodging,Food,& Beverage 2/	10.60	6	3	9	10	6
Fishing	3.50	2	2	2	1	2
Outfitting & Rentals	3.30	2	1	3	1	1
Winter Sports	0.18	*	*	*	1	*
Other Rental Purchases	22.80	12	14	9	8	14
Total	$5,958,000	100	100	100	100	100
Total Dollar Average Per Party	$187.00	-	$169.00	$223.00	$273.00	$144.00

1/ Source: survey of random sample of parties registered in Cook County public overnight facilities. In some cases parties are larger than one that might travel in a passenger automobile. Excluded are tourists who stayed with friends and relatives and in second homes and who do not stay overnight.

2/ See footnote 3 to table 46

* Less than 0.5%, total may not add to 100% because of this omission.

TABLE 49. FALL EXPENDITURE PATTERNS OF COOK COUNTY TOURIST PARTIES STAYING OVERNIGHT IN PUBLIC FACILITIES BY TYPE OF LODGING FACILITY, 1981 1/

Type of Expenditure	Average of all Summer Tourist Parties		Type of Lodging Facility			
			Motels	Resorts	Rental Condos	Camp
	$	%	%	%	%	%
Transportation	34.00	16	14	20	12	31
Lodging	68.80	33	28	33	53	18
Food & Beverage	57.30	27	27	31	24	28
Lodging,Food,& Beverage 2/	9.40	5	5	5	2	4
Fishing	2.80	1	1	2	1	2
Outfitting & Rentals	13.70	7	11	1	*	2
Winter Sports	0.51	*	1	*	1	*
Other Rental Purchases	23.90	11	13	8	7	15
Total	$2,059,000	100	100	100	100	100
Total Dollar Average Per Party	$210.00	-	$159.00	$126.00	$196.00	$ 87.00

1/ Source: survey of random sample of parties registered in Cook County public overnight facilities. In some cases parties are larger than one that might travel in a passenger automobile. Excluded are tourists who stayed with friends and relatives and in second homes and who do not stay overnight.

2/ See footnote 3 to table 46.

* Less than 0.5%, total may not add to 100% because of this omission.

TABLE 50. RATING OF NORTH SHORE ACTIVITIES BY TOURIST PARTIES [1/] USING COOK COUNTY PUBLIC LODGING FACILITIES, BY TYPE OF LODGING FACILITIES USED 1981

Type of Activity	Grand Marais Resorts & Motels rating [3/]	Grand Marais Resorts & Motels % doing	Other Cook County Resorts & Motels rating [3/]	Other Cook County Resorts & Motels %doing	Rental Condos rating [3/]	Rental Condos %doing	Campgrounds [2/] rating [3/]	Campgrounds [2/] %doing
Picking wild berries	3.7	15	3.7	23	3.9	8	3.7	21
Bicycling	3.0	1	4.0	5	1.0	1	4.2	6
Going to movies	2.3	3	3.5	2	4.3	2	3.5	2
Hiking	4.3	52	4.5	68	4.4	57	4.5	88
Picnicking	4.0	36	4.1	40	4.4	31	4.2	71
Canoeing	4.4	17	4.6	24	4.8	12	4.6	18
Motor boating	4.1	7	4.1	8	3.8	5	4.3	6
Golfing	4.0	1	4.4	7	4.3	2	0	0
Horseback riding	0	0	4.0	1	5.0	1	0	0
Fest. & Comm. events	4.3	9	4.3	12	4.0	5	3.8	6
Cooking								
Hunting	5.0	1	3.8	2	3.0	1	4.0	2
Fishing	4.3	18	4.3	31	4.1	17	4.4	34
Sun bathing	3.7	20	3.7	28	3.9	21	3.6	31
Using a sauna	4.0	4	3.5	12	4.0	60	3.4	7
Waterskiing	2.0	1	0	0	4.0	4	0	0
Tennis	2.0	1	4.3	6	4.5	2	3.5	2
Dining for pleasure	3.9	79	3.9	80	3.8	72	4.0	47
Taking pictures	4.3	75	4.2	81	4.2	78	4.4	89
Driving for pleasure	4.3	77	4.2	82	4.1	69	4.2	80
Jogging	3.4	8	3.4	10	4.0	10	4.0	9
Sailing	2.5	2	4.7	3	5.0	1	5.0	1
Visiting hist./cult. museums or sites	4.3	54	4.0	55	4.0	44	4.2	67
Shopping	3.5	53	3.5	56	3.3	47	4.3	56
Swimming	3.8	16	3.8	27	4.0	32	3.9	21
Seeing live entertainment	3.4	41	4.5	4	3.3	8	3.5	2
Visiting Interpretive Centers	4.0	19	3.9	28	3.6	21	3.9	46
Going on ind. tours	4.0	8	4.3	7	4.3	5	3.8	6
Driving off-road vehicles	3.3	3	3.7	3	3.0	1	4.3	3
Reading	3.4	30	3.6	42	3.6	56	3.7	38
Observing nature	4.5	81						
Camping: Wilderness Site	4.8	18	4.9	19	4.9	8	4.5	41
Camping: Developed Site	4.7	11	4.6	12	5.0	2	4.2	85
Socializing	3.6	50	3.8	61	3.9	56	3.6	71
Back Packing	3.8	9	4.6	14	4.3	8	3.1	23
Watching Lake Superior	4.3	78	4.6	86	4.5	89	4.4	95
Ski touring	4.4	7	4.8	3	4.5	22	5.0	4
Downhill skiing	4.3	3	5.0	5	4.6	31	5.0	1
Snowmobiling	0	0	0	0	1.5	1	0	0

1/ Source: survey of random sample of parties registered in Cook County public overnight facilities. In some cases parties are larger than one that might travel in a passenger automobile. Excluded are tourists who stayed with friends and relatives and in second homes and who do not stay overnight.

2/ Campgrounds facilities include commercial units and those operated by local and state governmental agencies.

3/ Ratings were: 1-a bad experience; 2-added little or nothing; 3-added somewhat to the trip; 4-added strongly; 5-added most strongly. The figure given is a weighted average of all responding to the questions.

TABLE 51. RATING OF NORTH SHORE FACILITIES AND SERVICES BY TOURIST PARTIES USING COOK COUNTY PUBLIC LODGING FACILITIES, BY TYPE OF LODGING FACILITY USED 1981. 1/

	Grand Marais Resorts & Motels		Other Cook County Resorts & Motels		Rental Condos		Campgrounds 2/	
Facilities and services	rating 3/	% doing	rating 3/	%doing	rating 3/	%doing	rating 3/	%doing
Loding accomodations	4.3	95	4.5	92	4.7	97	4.1	27
Campground accomodations	4.5	23	4.7	30	4.4	9	4.4	93
Food service quality	4.0	79	4.0	73	4.0	57	4.3	38
Food service quantity	4.1	78	4.1	73	4.2	60	4.3	42
Overall upkeep	4.3	72	4.5	82	4.4	82	4.4	92
Hospitality of accom. people	4.4	80	4.4	84	4.3	81	4.5	82
Organized activities	3.7	6	3.4	12	3.1	10	3.8	12
Things for pre-teens	3.6	9	3.6	11	3.9	27	3.6	13
Things for teens	3.5	21	4.2	14	4.0	27	3.6	21
Experience with other guests	3.9	36	3.9	65	3.8	56	4.0	48
The kinds of things	4.0	37	4.0	56	4.3	77	4.6	67
Game room	3.2	9	3.1	18	3.7	61	3.3	8
Laundromat	3.6	5	3.9	7	3.3	15	3.2	11
Guide service	3.3	4	3.7	89.1	4.0	10	4.6	5
Outfitting service	4.2	6	4.4	88.8	4.4	7	4.5	7
Accuracy of information	4.3	55	4.3	73	4.3	82	4.4	73
View of Lake Superior	4.5	69	4.5	73	4.9	82	4.5	87
View of Northwoods	4.4	62	4.4	70	4.6	73	4.5	76
Your access to beach	4.4	58	4.3	61	4.4	64	4.4	69
Cost of food, lodging	4.1	90	3.9	90	3.9	92	4.1	80
Availability of boats	4.33	16	3.7	17	3.2	16	4.0	10
Nature interpretation	4.1	15	3.7	14	3.6	14	4.1	32
Instruction in fishing	3.2	5	3.9	10	3.1	16	3.8	5
Winter activities	4.8	6	4.7	92	4.4	43	4.8	5

1/ Source: survey of random sample of parties registered in Cook County public overnight facilities. In some cases parties are larger than one that might travel in a passenger automobile. Excluded are tourists who stayed with friends and relatives and in second homes and who do not stay overnight.

2/ Campgrounds facilities include commercial units and those operated by local and state governmental agencies.

3/ Ratings were: 1-a bad experience; 2-added little or nothing; 3-added somewhat to the trip; 4-added strongly; 5-added most strongly. The figure given is a weighted average of all responding to the questions.

TABLE 52. VACATION ACTIVITY PLANS BY CHICAGO RESIDENTS, 1980.[1/]

Recreational Activity	Percent Including the Activity in Vacation Plans	
	Recent Northern[2/] MN vacationers	All other Chicago vacationers
	%	%
Fishing	64	37
Canoeing	34	18
Motor boating/water skiing	43	38
Hiking	58	44
Hunting	10	13
Snowmobiling	15	12
Cross Country skiing	15	11
Downhill skiing	20	15
Industry touring	21	26
Historical site visitation	67	75
Fall color viewing	74	71
Natural area visitation	91	85
Number of Respondents	100	650

1/ Source: population was a random sample drawn from Chicago area census tracts ranking in the upper two-thirds in socio-economic terms. Thus it is representative of those having the means to travel.

2/ Recent northern Minnesota vacationers are those who had vacationed in Minnesota north of the Twin Cities within the past 5 years. Note that only 13 percent 100/750 reported a recent northern Minnesota vacation.

1984