



Tourism Assessment of Faribault, Minnesota



Tourism Assessment of Faribault, Minnesota

A CUSTOMIZED TOURISM ASSESSMENT PROJECT

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EXECUTIVE SUMMARY

Visit Faribault engaged the University of Minnesota Tourism Center and Extension Center for Community Vitality to assist their tourism development efforts by better understanding current tourism products and identifying opportunities to expand tourism to Faribault. To address this goal, the Tourism Center assembled a 10-person team of tourism and community development specialists to visit the community and assess existing products and services. The team visited Faribault on August 24, 2015. They evaluated characteristics including appearance, amenities, and access, looking for opportunities to enhance tourism. Their findings were coupled with research on significant tourism trends and information provided by Visit Faribault. This report reflects the team's findings aligned to tourism trends and the existing data and information provided by the community.

Two significant global tourism trends to consider when examining Faribault's tourism opportunities are the desire for authentic experiences, and the increased use of social media and user driven information. Several additional trends in tourism are relevant to Faribault and are discussed in this report:

- Cultural/Heritage Tourism
- Culinary Tourism
- Active Lifestyle and Wellness Tourism
- Accessible Travel
- Multigenerational and Niche Tourism

Faribault has an enviable set of built assets including its historic downtown, community facilities, businesses, schools, and good infrastructure. Its assets also include natural resources, such as the river, lakes, and trails. These tangible assets, coupled with community pride and active human and social capital, provide a solid foundation for harnessing tourism opportunities identified during this project. The good news is that harnessing these opportunities more fully can, in many instances, be accomplished by tweaking existing efforts rather than requiring major capital development.

A number of short- and long-term projects that can address the opportunities discovered in this project are listed below. These are explored at greater length in the report, as well as findings are provided to support these ideas.

Ideas and Strategies

- Cultural / Heritage Tourism:
 - Consistent with the Community Vision 2040, strengthen downtown as a destination
 - Enhance interpretive signs of historic buildings, statues and artwork
 - Establish a stronger linkage to the riverfront for tourism usage
 - Develop a storefront visitor center and museum downtown
 - Implement and enforce zoning and planning in the historic downtown to restore building facades and establish guidelines for signage etc.
 - Explore the feasibility of additional downtown lodging such as a boutique hotel
 - Expand downtown business offerings with complementary businesses and attractions such as boutique retail, gift shops, artisan galleries and unique dining.
 - Encourage businesses and restaurants to extend hours and stagger the days each are closed to bring folks downtown every day and evening.
 - Use creative strategies to fill employ storefronts (e.g. displays, pop-up stores)

- Culinary Tourism
 - Build on the diversity of eating options including ethic, upscale and local, fresh, organic dining choices either in storefronts or food trucks
 - Encourage development of new breweries, taprooms and wine tasting rooms,
 - Explore cooking classes and other engaged activities for visitors and residents
 - Enhance hospitality through customer service training
- Active Lifestyle and Wellness Tourism
 - Improve safe connections between the state and local bike trails
 - Develop educational offerings at River Bend Nature Center (e.g.. bird watching)
 - Explore development of lodging/camping at the nature center
 - Enhance marketing efforts with motorcycle tourists
- Accessible Travel
 - Develop a plan to identify and address the accessibility needs of diverse travelers
- Multigenerational and Niche Tourism
 - Promote local tourism opportunities to residents to reach the Visiting Friends and Relatives (VFR) market
 - Package and promote Faribault for multigenerational experiences
- Marketing:
 - Enhance mobile e-marketing with access to information for visitors while in the community as well as before they arrive.
 - Add a 12-month calendar to the VisitFaribault.com website and provide links to event websites.
 - Package recreational opportunities with lodging and dining options to target niche markets (e.g. motorcycle tourists, business travelers, and parents of students)
 - Enhance wayfinding signage
 - Survey parents of students at Shattuck St Mary's and the Minnesota School for the Deaf and Blind about ways to enhance their tourism experiences.
 - Identify regional marketing opportunities with nearby communities for greater reach

Faribault has the potential to develop a strong sustainable tourism initiative, given its many assets and core group of enthusiastic supporters. Faribault can build on this momentum by leveraging its assets, strengthening community involvement, and marketing effectively.

INTRODUCTION

Visit Faribault contacted the University of Minnesota Tourism Center and Extension Center for Community Vitality to assist with its tourism development efforts. This was done to better understand current tourism products and identify opportunities to expand tourism in Faribault. To address this goal, the Tourism Center assembled a 10-person team of tourism and community development specialists to visit the community and assess existing products and services. The team visited Faribault on August 24, 2015, meeting with representatives from Visit Faribault and the Faribault Area Chamber of Commerce, and moving about the community to complete the assessment and document their findings.

The team was also asked to provide perceptions of the community before they arrived and an assessment of online information about Faribault. Once in the community, the team split into pairs. They took photos and recorded their experiences walking and driving around Faribault, visiting businesses, the historic downtown, lake resorts, outdoor spaces and other areas. They evaluated characteristics including appearance, amenities, and access, looking for opportunities to enhance tourism.

Their findings were coupled with research on significant tourism trends and information provided by Visit Faribault. This report reflects the team's findings aligned to tourism trends and the existing data and information provided by the community.

Following their visit, the report authors reviewed the City of Faribault's Community Vision 2040. The findings by the expert team align with this community vision as noted throughout this report.



COMMUNITY VISION FOR 2040

SMALL TOWN PRIDE. BIG CITY OPPORTUNITY.

Faribault is one of America's best small communities.

A place where all people find opportunities to succeed, grow, and prosper.

We celebrate our unique strengths in education, business, industry, medical, nature, recreation, leisure, and the arts - and we are proud of our historic downtown and iconic institutions.

As a community, we embrace the future and plan for positive change through our commitment to innovation and excellence, making Faribault an outstanding place to live, work, grow,

DEFINING TOURISM

Tourism has many definitions, but the Tourism Assessment Program (TAP) focuses on “person-trips,” as defined by the U.S. Travel Association: “One person on a trip away from home overnight in paid accommodations or on a day or overnight trip to places 50 miles or more (one-way) away from home.”

This definition meets the goal of a destination marketing organization to generate overnight stays and includes specific criteria of measureable distance, time, and paid accommodations.

This definition, however, does not describe the purpose of travel. Tourists are not just vacationers. Travelers visiting friends and relatives (VFR), pass-through travelers, and business travelers are also tourists by this definition. Identifying and differentiating current and potential types of visitors is an important step for Faribault. In this report, several potential niche markets are discussed as potential target audiences, but there are also opportunities such as the business and VFR markets that can be reached through local communication efforts.

Opportunities exist to provide goods and services for a variety of visitors coming to Faribault, which include the following:

- **Leisure visitors including Visiting Friends and Relatives (VFR):**

In addition to the types of visitors included in the definition above, there are also those who do not meet its particular criteria. These people may include vacationers or day trippers from the Twin Cities or regional communities, and those visiting friends and relatives (VFR).

The Visiting Friends and Relatives (VFR) market is a significant segment of tourists. According to the U.S. Travel Association, more than three out of four domestic trips are taken for leisure purposes, accounting for 1.7 billion person trips in 2014.

Marketing to the VFR market is done primarily through community residents. It is strengthened by regularly informing community members about attractions, events and happenings in the community and region. Building awareness of local tourism activities and events gives residents information to share with their friends and family. It also offers other positive benefits, such as increasing community pride and involvement. Not surprisingly, the Community Vision 2040 included a number of initiatives to promote facilities, festivals and events to residents.

A unique VFR market in Faribault are the families of the students at the three highly rated residential middle and high schools. Shattuck-St Mary’s (SSM) has more than 400 students from more than 20 countries, according to the school’s website. Anecdotal information provided by the community suggests that families visit their children and stay in local or nearby lodging. For example, the SSM website says that, twice a year, families are invited to campus to meet with teachers, coaches, and most importantly, to spend time with their children. Special activities and events are planned for these weekends, which typically occur in October and February. The Minnesota State Academy for the Blind (MSAB) and the Minnesota State Academy for the Deaf (MSAD) also have families visiting Faribault (described in more detail in the Accessible Travel section of this report).

This presents an opportunity to market the unique attractions of the community and region, and track the impact of their visit.

- **Pass-through visitors:**

Enticing travelers who drive-by on Highway I-35 to stop, stay a while, and spend money is another opportunity. Appealing signage that generates curiosity will draw visitors. Think of the iconic South Dakota “Wall Drug” signs, for example, that build anticipation. Improved billboards and way finding signs will encourage visitors to exit, visit the downtown or local businesses, and see the potential for a longer stay.

- **Business visitors:**

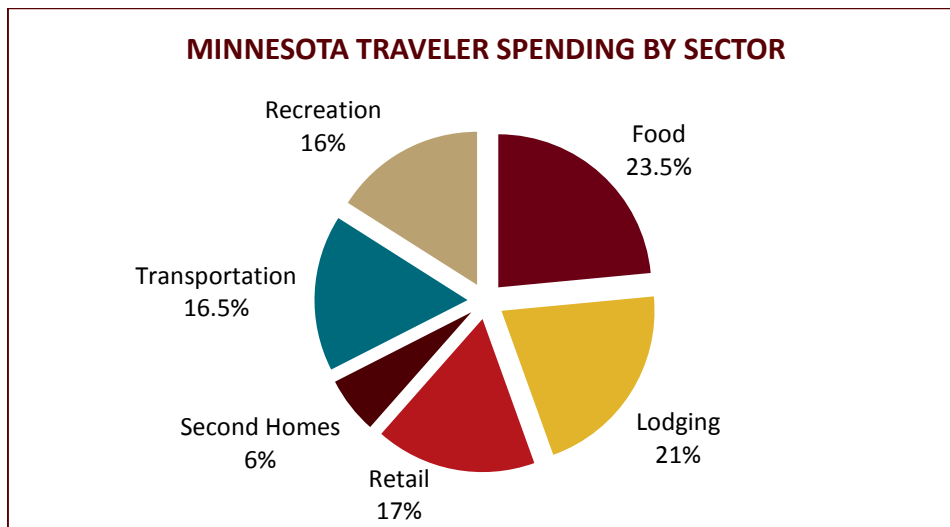
Identifying ways to more intentionally market to existing business travelers to increase their stay is a relatively low-cost and easy to implement strategy. This market includes customers, vendor representatives, and possibly employees. There are a number of vendors and employees currently bringing in business travelers including Sage and Faribault Foods. The Chamber of Commerce, for example, is aware of the significance of the manufacturing sector in Faribault, which accounts for 26.5% of local private sector jobs (www.faribaultmn.org).

Don't overlook the other entities that bring people to Faribault for goods and services including the funeral home, the regional hospital, and county government.

Working with local businesses to reach their visitors serves a dual purpose of both promoting tourism opportunities and building awareness of tourism's importance in Faribault. Strategies include ensuring Visit Faribault brochures are available at each business.

MINNESOTA AND REGIONAL TOURISM

Tourism is a major economic driver. In Minnesota, it is a \$13 billion dollar industry that generates 17 percent of state sales tax revenue and more than 250,000 jobs from entry level to executive level. Spending is then distributed throughout the economy.



Source: Explore Minnesota Tourism 2015, based on 2013 revenue data.

Tourism happens in virtually every county of the state. In Rice County, for instance, 2013 tourism gross sales were \$151,069,788, generating \$6,504,917 in sales tax and employing 2,307 people in full-time, part-time, or seasonal jobs (Explore Minnesota, 2015).

Faribault's historic retail sales give an indication of its comparable strength in drawing visitors from outside the city. According to the most recent Retail Trade Analysis conducted by the University of Minnesota Extension using 2013 sales, Faribault's food and drinking establishments are collecting 19% more in sales per person than the average in Greater Minnesota. Amusement businesses are collecting 18% less and lodging is about half of the Greater Minnesota average.

However, when Faribault is compared to the similar sized Greater Minnesota cities of Winona, Owatonna, Hibbing, Austin, Northfield, Elk River, Wilmar, Albert Lea and Red Wing, Faribault shows retail strength in the tourism-related sectors. Sales in eating and drinking establishments in Faribault are 30% above and amusement sales are 72% above these similar-sized cities. Accommodations, however, lag at 10% below similar sized cities.

DEVELOPING TOURISM OPPORTUNITIES

In his book, *Marketing for Entrepreneurs*, Frederick Crane (2013) says that opportunities can be "recognized, discovered or created." This is particularly true of tourism opportunities because tourism is about individual experiences.

Recognizing opportunities requires a community to match existing assets—supply—with current or potential tourist markets—demand. For example, Faribault has nice parks, the river and nearby lakes, and an excellent bike trailhead. Bike tourism is a growing trend in Minnesota. Promote Faribault as the starting point for the Sakatah Bike Trail and package this with other recreational options to entice visitors to stay longer.

Discovering opportunities means supply or demand exists, and the other must be found, or "discovered." Faribault has several top quality educational institutions. Are there opportunities to expand nature-based recreational activities for visitors with physical challenges? This could involve tapping local experts to assist the community with appropriate signage, access, and mobility assessment. Could Faribault also connect students with the Historical Society to develop interpretation pieces, such as walking tours using QR code technology or short videos to tell the community's story?

Creating opportunities is necessary when neither demand nor supply exist in an obvious manner. For example, what opportunities exist to leverage current markets or local resources? Expanding and clustering craft breweries, wine tasting rooms, and dining options downtown will build this as a destination area for visitors and residents.

FARIBAULT'S TOURISM STRUCTURE

Faribault currently has a number of organizations involved in tourism and tourism promotion. The leading organization is the Faribault Area Chamber of Commerce and Tourism. The Community Marketing Director is charged with guiding Faribault's tourism promotion. Staff work closely with other organizations including the Main Street Program, city and others.

Faribault has a recently formed Tourism Commission appointed by the City Council. They meet monthly with the Chamber of Commerce and Tourism to review marketing efforts as they relate to the lodging tax. The group also studies and discusses trends, statistics and strategies to help guide those investments. The execution on those plans and investments is done by the Chamber of Commerce and Tourism and is led by the Director of Community Marketing.

The Chamber of Commerce and Tourism is dedicated to not only marketing Faribault's tourism/visitor product, but also to lead in the development of plans for improving and expanding it.

Relationship of Tourism Development to Faribault's Community Vision 2040

The city of Faribault adopted a community vision in 2015 following a significant community engagement process. Tourism enhancement in the community can be a significant step in moving this vision forward to strengthen Faribault as a place to live and play. The Community Vision 2040 articulates Faribault's core values and operating principles as:

- a. Sense of community
- b. Sense of place
- c. Opportunity
- d. Innovation
- e. Excellence

The Community Vision 2040 document provides community leaders, residents, and planners with a framework for developing Faribault in the coming years. Visit Faribault's goal to enhance tourism in the community aligns with the strategic priorities identified by the community:

- Thriving economic development
- Excellent schools and high quality education
- Pride in our community
- Public safety
- A vibrant downtown
- Access to nature, leisure, and the arts

Faribault has an active and well-developed tourism effort in place that provides economic benefit and development opportunities by encouraging visitors to engage with the community's abundant natural and cultural resources. The historic downtown area is a key attraction that can be further enhanced to create a vibrant destination for visitors and residents. Embracing Faribault's history of immigrants, manufacturing, farming, and quality craftsmanship is also an opportunity to connect past and present. Engaging residents to tell Faribault's stories can build support for tourism, grow local pride, and increase social capital across the community. Maintaining and capitalizing on existing arts, natural settings, and leisure activities, as well as refining current marketing efforts to match relevant market trends is a logical tourism development strategy for Faribault that also aligns well with its Community Vision 2040 goals.

FARIBAULT'S TOURISM ASSETS: PROJECT FINDINGS, IDEAS AND STRATEGIES

So, what are the opportunities for Faribault to more fully harness its tourism potential related to current trends?

To leverage tourism as an economic engine, it is necessary to identify key trends that benefit the community. Evaluating, understanding, and adapting to changing travel trends is essential to successfully target marketing efforts and attract niche markets to the community. Two important global trends of the 21st century for both destination and tourism businesses are the:

- Desire for authentic experiences and
- Increased use of social media and user driven information.

Several major tourism trends are relevant to current and potential tourism opportunities in Faribault and include the following:

- Cultural/Heritage Tourism
- Culinary Tourism

- Active Lifestyle and Wellness Tourism
- Accessible Travel
- Multi-Generational Travel

Potential strategies to address these trends are explored in this report within the context of Faribault’s tourism development opportunities.

Faribault has an abundance of assets for tourism that also enhance the quality of life for residents. The community has done a good job of identifying these assets, as evidenced by available marketing literature and discussions with Visit Faribault and Chamber staff. Local assets include physical resources, such as rivers, lakes and buildings, as well as less tangible resources, such as cultural heritage, events, and volunteer networks. The following discussion focuses on two critical aspects of effectively harnessing these assets for tourism:

- 1) Maintaining and enhancing attractions and services, and
- 2) Marketing

1) Maintaining and Enhancing Attractions and Services: Findings and Strategies to Consider

Faribault’s enviable set of built and natural assets include its historic downtown, community facilities, businesses, schools, and good infrastructure. Its assets also include natural resources, such as the river, lakes, and trails. These tangible assets, coupled with community pride and active human and social capital, provide a solid foundation for harnessing tourism opportunities. The good news is that harnessing these opportunities more fully can, in many instances, be accomplished by tweaking existing efforts rather than requiring major capital development.

In the community briefing at the beginning of the visit, we heard about the significant population of Shattuck-St. Mary’s school parents that visit their children. These parents are considered a large driver for lodging stays in Faribault, followed by Sage, Faribault Foods, and other business travelers. It was acknowledged, however, that the city loses travelers who stay in Owatonna and the 2013 retail sales analysis confirms and the 2013 retail sales analysis confirms that accommodations sales lag at 10% below similar sized Greater Minnesota cities.

It was also noted that Faribault does not have a large banquet space in town, a goal identified in the Community Vision 2040.

The community representatives also commented on seasonal water quality problems in area lakes due to agricultural run-off that creates heavy algal blooms, and a lack of solid data regarding current tourism and visitors.

Faribault has a coordinated brand with the styled “F” font and tagline that is used on signs and banners across the community. Wayfinding signage was identified by community representatives as a significant need, and it was noted that Faribault already has a local committee working on signage strategies. Team members also noticed that better streetscaping and way finding signage could be used on Highways 21 and I-35. The majority of lodging properties are near the two I-35 exits, but there is little signage to guide visitors to the downtown area or other attractions and amenities. Good signage is essential for bringing visitors to dining, shopping, and attractions deeper in the community and should be a top priority.

Trend: Cultural/Heritage Tourism

Cultural/heritage tourism is defined by the National Trust for Historic Preservation as, “traveling to experience the places, artifacts and activities that authentically represent the stories and people of the past and present. It includes cultural, historic and natural resources.”

Cultural/heritage visitors like to engage with locals to learn about the community and its assets. They visit:

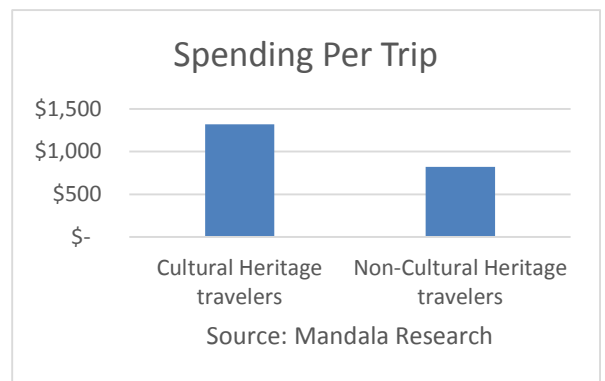
- Historic sites
- Museums
- Art galleries
- Theaters
- Cultural events or festivals

“Regardless of how cultural tourism is precisely defined, it clearly reflects three strong trends in tourism: the search for authenticity, visitors’ desire for immersive experiences, and heightened industry focus on diverse markets.”

(Source: Mandala, L. (2015) *Arts, Tourism, & Cultural Diplomacy*. Americans for the Arts, Washington, D.C.)

A 2013 study on cultural/heritage travelers by Mandala Research, LLC found that more than 129 million U.S. travelers participated in cultural/ heritage activities on their most recent trip or during the previous three years. For approximately 23% of these travelers, cultural/heritage activities are drivers of destination choice.

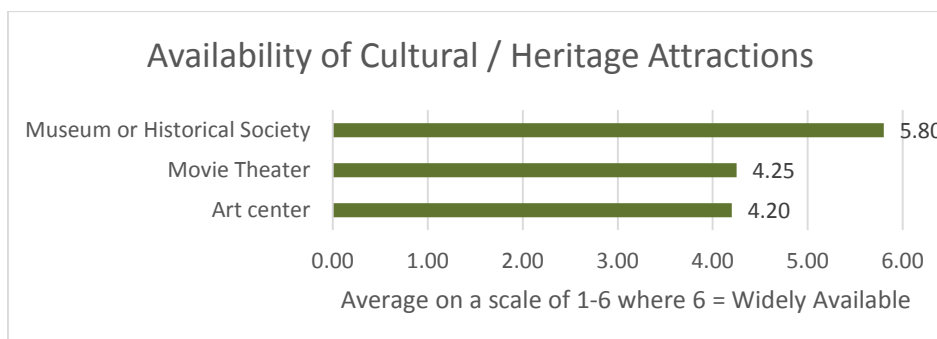
Based on self-reported spending data, the study found that cultural/heritage travelers spend significantly more per trip than non-cultural/heritage travelers. They spend an average of \$1,319 per trip compared to \$820 spent by non-cultural/heritage travelers. Of additional significance is that cultural/heritage travelers seek experiences that combine a variety of activities including culture, shopping, nature, dining, and recreation.



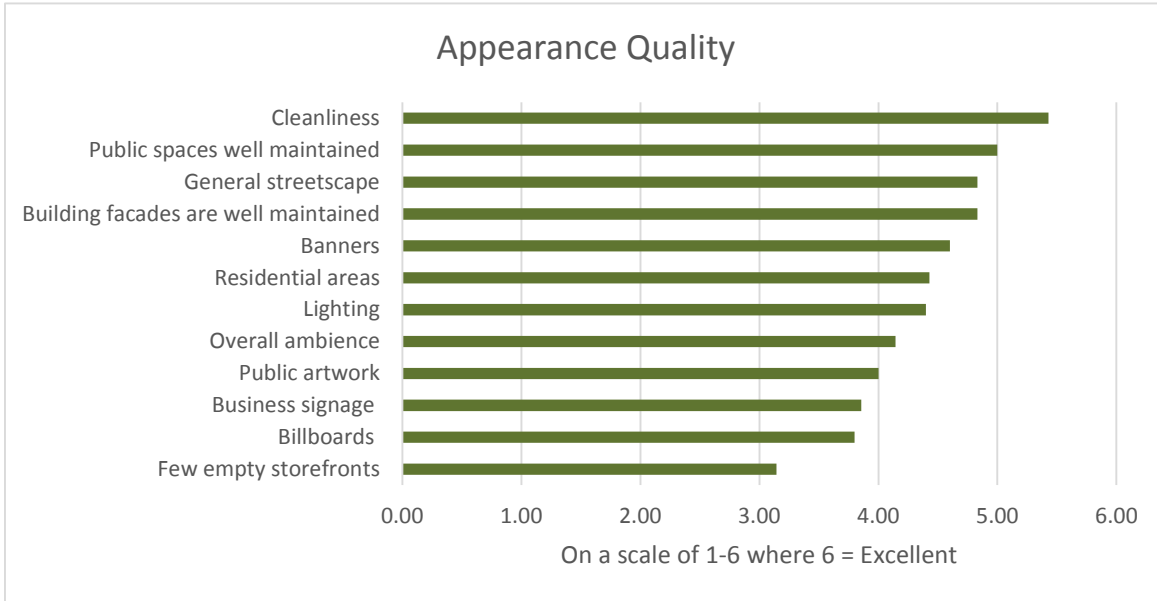
Findings from Observations of Expert Team Visitors

The expert team first looked at three traditional cultural/heritage attractions: museums, movie theaters, and art centers. This report will first present the overall ratings of cultural / heritage - related attractions and then make specific observations about a key attraction, the historic downtown.

The expert team easily identified cultural / heritage attractions (see below):



A special feature of Faribault is the extensive historic buildings downtown and throughout the community. The overall appearance of a community is important for tourism, but it is particularly important to the cultural/heritage visitor. This was viewed as a key tourism development opportunity by the expert team.



Because cultural/heritage tourists want to interact with local residents, hospitality is of utmost importance. Of particular note is that the expert team “felt safe & secure” during their visit, which is in direct contrast to the finding in the 2011 Main Street report. However, it is to be noted that the expert team was not in Faribault during the evening.



Historic Downtown

The historic downtown is recognized as a unique and significant asset for Faribault. A primary focus of Faribault's tourism development should be enhancing this area. Doing so will strengthen the community's ability to harness key tourism trends, enhance the quality of life for local residents, and encourage new business development. The findings by the expert team support the goals identified in Vision 2040 for downtown.

The concept of clustering as an economic development strategy has been widely used by communities (Harvard Institute for Strategy and Competiveness). In Faribault, the potential to cluster additional culinary businesses, including breweries, wine tasting shops, and dining establishments will recreate the historic downtown into a destination reflective

of the character and history of the community while still embracing present day trends. Paradise Center for the Arts is bringing more arts and culture to Faribault, and expanded dining options will encourage people to visit longer. Expanding complementary retail businesses will round out the experience for both visitors and residents.

The community currently has 290 hotel rooms but very limited downtown lodging. The similar-sized city of Mason City, Iowa recently re-opened Frank Lloyd Wright designed hotel which has become a destination in and of itself. It has encouraged business growth nearby and revitalization of the downtown area. Creative restaurants, shops, and a sculpture walk have been developed to support it and encourage walkers to look further than just the main street and town square. A boutique lodging facility in Faribault could be a long-term development strategy, but without data to understand current lodging occupancy and its market, it is impossible to determine need. It will require a full feasibility study and commitment of the city, Main Street Council, Chamber, and Visit Faribault to create, promote, and fulfill the vision.





The overall streetscape and architecture downtown is impressive. The landscaping and flowers, light poles, and banners are beautifully done. Parking seemed to be widely available and well signed. The variety of businesses downtown include ethnic restaurants, bakeries, and interesting shops to draw visitors in, but there are a number of empty storefronts. The mix of downtown businesses also does not appear to have a target audience with gourmet and thrift shops side-by-side. Experts asked: *Who is the target audience for the historic downtown?*

More clearly defining the downtown historic district would help visitors better appreciate it. The historic downtown can be more than Central Avenue by extending it to include the Court House and government buildings. Establishing visual boundaries and providing kiosk maps and interpretive guides at prominent entry points is needed. The mural at 4th Street and 2nd Avenue is a beautiful gateway to downtown. Explore ways to further enhance this approach and use similar visual approaches from other directions. The

buildings downtown are architecturally interesting. Use interpretive signage to provide the background of each building and tell its story. There are many excellent examples of effective historic districts in communities across the country.

It is also easy to miss The Depot and riverfront as a downtown dining option, as there is no signage. If visitors enter downtown from the west, there is no invitation to continue on to the riverfront. The street it is on is primarily local businesses, which does not encourage visitors to explore.

Visual representations, such as murals, help connect visitors and residents to the history and heritage of Faribault. Additional murals can help define and enhance the downtown district. Use the arts to tell Faribault’s immigration stories past and present, its religious history, and its role as a farming community.



In addition to empty storefronts, many of the shops and restaurants with inviting window fronts and retail offerings were closed on Monday during the summer (Cheese Cave, F-Town, and Bakery, for example), and others need updating. Observing the foot traffic for a period of time, the visiting team saw several parties try to visit these businesses only to be disappointed. Those visitors and their money went somewhere—but probably not in Faribault. One team member said, “I would have come down Sunday night for the Monday visit, but there wasn’t much available on Sunday or Monday in terms of eating places, etc.” This points to a development opportunity—visitors to historic communities and downtowns want unique or authentic dining and shopping experiences with business hours to accommodate travelers.

Other Cultural/Heritage Sites

Faribault has many other cultural/heritage assets that can be better promoted including the Faribault Woolen Mill, the Tilt-a-Whirl story, the Rice County Historical Museum, artisan galleries and

historic homes. Community pride is also evident in the general upkeep of the community, public green spaces, and even private gardens.



The Faribault Woolen Mill is an attraction for both group tours as well as shopping. This unique attraction hosts individual and group tours on selected days. It's national product advertising markets the Faribault name. Several expert team members met with the owner and were impressed by his commitment to both historic preservation and product quality. There are opportunities to enhance the history of this community icon through documenting past blanket patterns and promoting current customer anecdotes (i.e. Younger audiences would find

it interesting that George Clooney purchased Faribault's blankets for the cast and crew of "The Monuments Men" movie due to their authentic role in World War II.)

While the Tilt-a-Whirl downtown is available 24/7 for visitors, there was limited information about this iconic ride. Enhanced interpretation or potential use of a QR code near the attraction would allow extensive information to be made available on a website that could be updated with visitor's uploaded memories of their tilt-a-whirl rides.

The Rice County Historical Society museum has some unique exhibits including fossils - it is a gem that is easily missed by visitors due, in part, to incorrect information on Google Maps. The staff was friendly. The video history of Faribault was interesting, but the VHS tape quality was distracting. Some experts noted that the museum had a musty smell that could deter from the visitor experience. There are opportunities for the museum to contain more recent history including stories of the recent Latino and Somali immigrants to the community. A storefront visitor center/artisan gallery/historical exhibit in downtown would increase visibility for visitors and residents alike. Seasonally changing exhibits could also encourage repeat visitors.

There is also a lack of information about the walking tour of the historic district. There was no mention of it in the information center, or printed brochures or maps, and the only place to get the mobile version is to download it at the town library. Faribault is missing an opportunity to encourage visitors to spend more time looking around the town, visiting local businesses, and discovering potential opportunities for a return visit. It is suggested that Faribault extend availability of print maps across downtown and beyond, create additional access points to the mobile guide, and ensure that visitors know about it and can download it while they are visiting.



Cultural/Heritage Tourism: Next Steps for Consideration

Short-Term Project Ideas and Strategies

- Make walking tour brochures more widely available.
- Offer guided walking/biking tours of downtown and beyond with iconic characters from Faribault's history.
- Partner with Shattuck-St Mary's to create special event packages for families of students.
- Empty Storefronts:
 - Feature the link at www.Visitfaribault.com and <http://faribaultnpc.org/> which has rich information on the community's history and virtual walking tours/podcasts.
 - Fill empty storefront windows with images, historic items, story-boards, or seasonal decor. One option is to create pop-up stores and galleries and historical society exhibits in empty downtown spaces. (Pop-ups are short-term venues for retail and the arts.) These could be used seasonally, for themed events, or simply to generate foot traffic downtown.



- In print literature including the Visit Faribault magazine, include the addresses as well as days and hours of operation.
- Ensure key sites are correctly located on Google Maps.
- Create a “Selfie” trail of Faribault's iconic sites. Invite folks to post them on your website.

Long-Term Ideas and Strategies

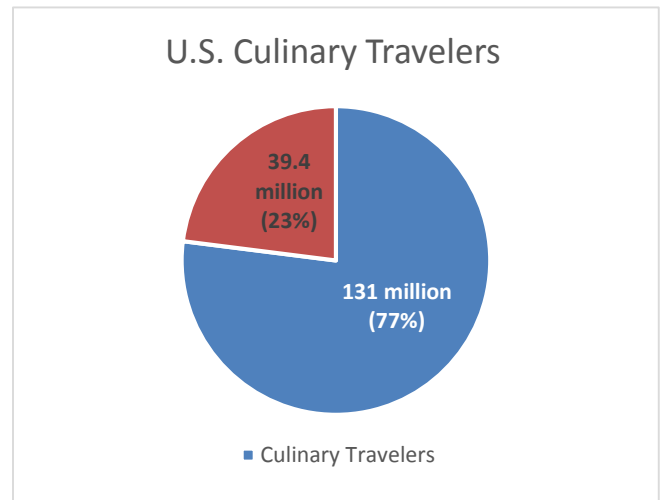
- Establish a downtown storefront visitor center/history center to share Faribault's story. (The information at <http://faribaultnpc.org/> could be incorporated.)
- Create a better linkage to the riverfront downtown, which has been beautifully redeveloped but is underutilized.
- Downtown Streetscape:
 - Implement and enforce zoning and planning in the historic downtown to create a clearly designated district, restore building facades, and establish guidelines for signage etc. Many historic downtowns have been revitalized in this manner to preserve their history and establish a vibrant retail and dining destination experience for visitors and locals. An example to consider is Dahlenega, GA (www.dahlonaga.org).
 - Explore the feasibility of a downtown historic inn/boutique hotel.
 - Expand downtown business offerings with complementary businesses and attractions, such as boutique retail, gift shops, artisan galleries, and unique dining.
- Develop a website with Tilt-a-Whirl history, including opportunities for visitors to add their stories and photos. Enhance interpretation at the Tilt-a-Whirl attraction downtown.
- Seek interpretive design expertise to assist with historic interpretation and visual enhancement of downtown.
- Develop, test and implement way finding signage, as identified in the Community Vision 2040.
- Install interpretive signs on historic buildings.
- Enhance information about Faribault Woolen Mills' patterns and history online.

- Tell the immigrant story of Faribault past and present. One possible organization is the Rice County Historical Society Museum through expansion of the history of the new Latino and Somali communities. This strategy is consistent with the Vision 2040 initiative of promoting and celebrating Faribault as a diverse and inclusive community.
- Provide interpretation signage about statues such as the Ten Commandments tablet and Virgin Mary statue at the Community Center as part of Faribault's story.

Trend: Culinary Tourism

Culinary tourism is a fast growing trend that encompasses many available opportunities in Faribault. According to a 2013 study of American Culinary travelers by Mandala Research, LLC, culinary tourism includes a broad array of activities such as:

- Dining experiences
- Gourmet food shops
- Food festivals
- Cooking classes
- Farmers markets
- Wineries
- Breweries



This study found that, of the approximate 170.4 million U.S. leisure travelers (those having taken at least one trip in the last 12 months for leisure), nearly 77% identified as culinary travelers, having participated in culinary activities in the previous three years. Furthermore, about half of all leisure travelers (51%) travel to learn about and enjoy unique and memorable eating or drinking experiences.

Experts noted that research is showing that millennials are spending more of their earnings on food than any other generational cohort. They are buying local organic food, and will spend more on the experience that accompanies their meals. The experience might include sidewalk dining, a patio area that provides great ambience, music, art displays, themed eating and décor.



Craft breweries are a relatively new and rapidly growing culinary tourism sector. According to the Brewers Association (www.brewersassociation.org), in 2014 there were nearly 3,500 U.S. breweries, including regional craft breweries and microbreweries. According to Minnesota Public Radio (April 7, 2015), the Minnesota Department of Public Safety projects there will be more than 110 craft breweries in Minnesota by the end of 2015.

Findings from Observations of Expert Team Visitors

The variety of dining opportunities in downtown and beyond is good. A focused effort around culinary tourism can capitalize on existing assets like F-Town Brewery and The Cheese Cave to

establish downtown as a dining and shopping experience. The downtown already has more than a dozen culinary establishments, including local bakeries, ethnic foods and home style establishments.



One expert team member, for example, was impressed with the variety of dried peppers at a Latino grocery store. Working with these businesses to enhance menus and service will also benefit tourism. For example, several experts visited the Somali restaurant, but left unsure as to whether it is an eatery or not. It smelled wonderful, in part due to the spices sold in the grocery, but the business appears oriented to the local Somali population rather than visitors. It is an asset, however, that can be a wonderful part of the Faribault dining scene.

Faribault has already implemented the recommendation to encourage a craft brewery from the Main Street Downtown Market Analysis study in 2011 with the opening of F-town Brewery. The strong growth trend in the craft brewery market in Minnesota (and nationally) suggests there may be further opportunities for an additional brewery or taproom to create a cluster downtown.

Given Faribault's farming history and roots, explore additional opportunities to further match the culinary trend for local, organic, innovative, and creative foods.



Culinary Tourism: Next Steps for Consideration

Short-Term Ideas and Strategies

- Customer Service training:
 - Offer hospitality training to area businesses.
 - Offer basic business and hospitality/tourism training for newer businesses and entrepreneurs, or provide resources to support this.

- Business Hours:
 - Encourage restaurants and businesses in downtown to expand hours and days of operation to extend beyond the typical business day (this is especially important to business travelers).
 - Encourage restaurants to stagger the days each are closed as a strategy to bring folks downtown every day.
- Dining
 - Promote the community’s dining variety, as well as traditional diners or restaurants known for home cooking. One example of diners co-marketing themselves: <http://www.onlyinyourstate.com/minnesota/mn-diners>.
- Cooking classes:
 - Explore opportunities to partner with businesses, such as the Somali and Latino restaurants, and offer residents and visitors ethnic cooking classes.
 - Explore community education classes, such as chocolate or cake decorating classes that can be offered in downtown facilities.
- Social media:
 - Ensure establishments are correctly located on Google Maps and Yelp, along with listing their hours of operation.
 - Encourage establishments to develop a strategy for responding to online consumer reviews.
 - Identify ways that Visit Faribault social media can link with local business social media (i.e. re-Tweet messages).



Long-Term Ideas and Strategies

- Explore a rentable food truck where community restaurants can “pop up” at the craft brewery on a rotating schedule (or entrepreneurs can test new markets).
- Build on the diversity of dining options. Additional opportunities include ethnic, upscale, and local, fresh, organic dining choices.
- Encourage development of new breweries, taprooms, wine tasting rooms, and dining opportunities in the downtown area. What regional foods/wines/brews are available that could be represented?
- Develop downtown as a dining / entertainment destination.

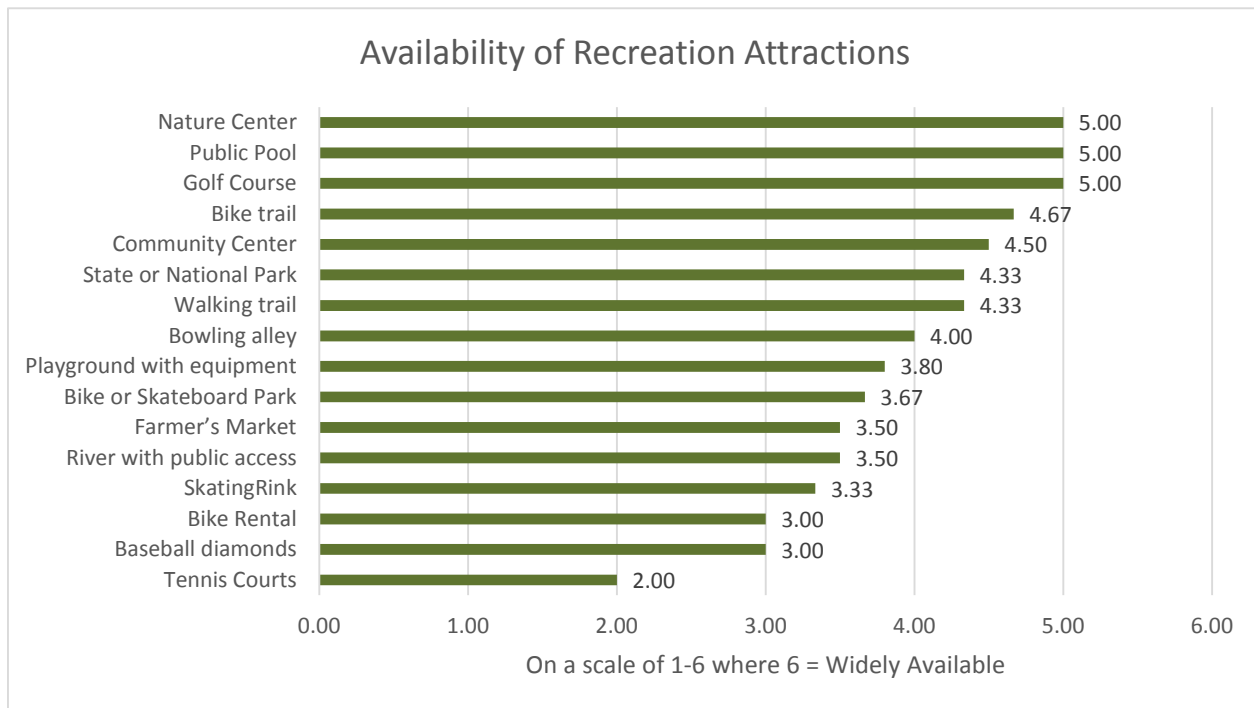
Trend: Active Lifestyle and Wellness Tourism

Travelers today are interested in participating in some type of physical activity, recreation, or other activity. The “2014 Global Wellness Economy Monitor,” conducted by SRI International, found that wellness tourism accounted for \$494 billion in revenues in 2013, an increase of nearly 13% over 2012. According to the study, wellness travel encompasses two types of trips—those specifically designed to maintain and improve health and those in which travelers keep their healthy habits while they travel for business or pleasure. In the U.S., it is estimated that one in four adults (41 million people) are consumers of Lifestyles of Health and Sustainability (LOHAS), <http://www.lohas.com/about>.

Many tourists plan trips specifically for active lifestyle or wellness activities—sports or recreation activities like biking or hiking, visiting spas, health resorts, and mineral baths and hot springs. They also enjoy yoga retreats, national parks, gyms and fitness centers, and even specialty restaurants. Many of these activities are assets that enhance the quality of life for residents as well.

Findings from Observations of Expert Team Visitors

Faribault’s assets for recreation include the state and city bike trails, 39 local parks, a nature center, aquatic center, golf and disc golf, ten lakes within 10 miles, and the river for water sports. While many of these are amenities developed for residents, there is an opportunity to expand their use for visitors as well. Some amenities, like the bike trails and river kayaking, are already marketed for tourists, but others can be more intentionally promoted as well. The expert team focused on two main areas for enhancement: biking and the nature center.



Biking

Biking is an example of a growing active lifestyle trend for travelers and residents alike. Its popularity has spurred many communities to add bike lanes, create trails, or build mountain biking courses. According to People for Bikes (www.peopleforbikes.org), Americans spend \$81 billion on biking annually. More about this in trend can be found in Appendix C.

Faribault is well positioned to respond to the bike tourism trend. The Sakatah Singing Hills State Trail offers 45 miles of good trails, easy access, and connections to other communities for riders of all levels. The trailhead on Highway 21 has excellent facilities, including parking, seating, restrooms, and bike maintenance equipment. Experts noted an opportunity for improved tourist information to encourage trail users to visit downtown. The only access to the trailhead from the road is by heading south on Highway 21. This is a busy, high speed area that is easily missed because the sign is difficult to see until you are almost on it. If you miss the driveway, you have to either do a U-turn in the median or go to the nearest intersection and try to turn back.

Access from the state trail to the city trails is more difficult. Several experts noted concern about the busy highway crossings needed to travel into downtown. Additionally, the city trails are not well designated. There should be a way to get from the state trail to the city trails on the east side that is well marked. These relatively minor adjustments can position Faribault as a bike-friendly community for people of all ages and abilities.



Team visitors also observed a large number of people walking and biking on the shoulder of Highway 21 around the Burger King area. This didn't seem safe and added to the impression that developing dedicated walking or bike paths around the city would provide a safe alternative, encourage residents and visitors to be active, and provide a buffer from the road. (This need was also identified in the Vision 2040's goal for maintaining public safety infrastructure.)

Experts indicated that finding bike racks downtown was more difficult than expected. Several visited the bike shop to inquire about bike rentals and were directed to the rental facility on a side street across from the Chamber office. This location is near the state trailhead but somewhat difficult to find, and visitors downtown are less likely to drive back to find it. Experts noted that

the rental price was reasonable for a family and that the quality of the bikes seemed very good. There are opportunities to capture impulse rentals, as well as intentional users, with innovative marketing and by making equipment easily accessible on weekends and holidays. An example is to bring a few bikes and helmets on a trailer to key contact points.

Faribault is sandwiched between the two very active biking communities of Northfield and Owatonna. Faribault also has many county roads that are paved gravel. Could Faribault connect with Rice County to help foster the development of off-road biking routes in Northfield and Owatonna?

Being located in the middle of two active biking communities, Faribault could take the lead in creating a multi-community partnership with the other cities. Faribault is the trail head location for the Sakatah Singing Hills Trail, so co-promoting that opportunity with surrounding communities may be beneficial.

While the state and city trails afford biking opportunities, Faribault also has other complementary recreational facilities that are underutilized for tourism. These include the BMX track, aquatic center, golf, and kayaking. It was somewhat challenging for the visiting teams to access these amenities or their information about hours, fees, and rentals. Make it easier for bike tourists to extend their day with packages and focused offerings—for example, a two day/one night (or longer) option of activities targeted to the recreational visitor that could include lodging plus half-day canoe/kayak rental, bike rental with helmet, disc golf or swimming, and then a fun dinner and brew to relax.

River Bend Nature Center

The River Bend Nature Center is a beautiful asset for Faribault residents and visitors. It is unusual for a community to have a tract of land this size for nature study. The expert team saw many opportunities to expand offerings related to birding, prairie restoration, and other natural resource education. This would position the Nature Center as a community amenity that can be maximized to attract more visitors.

Several visiting experts commented that it was the best visitor experience they had. One expert team visitor remarked, “This place is a gem! It feels like a state park, and it’s basically in a neighborhood of Faribault.” They also noted that River Bend Nature Center had the friendliest staff and most knowledgeable, passionate people they met during the day. Finding River Bend Nature Center was noted as a problem, however, with limited signage. Additionally, Google Maps sent users to the state prison.

Lakes and Resorts

The nearby lakes and resorts are also a valued part of the tourism landscape in Faribault, but according to community representatives, the majority of users are locals, with an estimate of less than 5% seasonal visitor usage (mostly from Iowa). Additionally, it was noted that seasonal lake water quality is a problem. Expert team members who did visit some of the resorts noted a nice setting and easy access from town. They also noted that camper, cottage, and camping facilities were generally intermixed at each facility. The facilities were older but appeared maintained, although they were not able to see inside units. The team members noted a general lack of staff interest in potential guests, and in one instance, a team member felt put off by a comment. The particular individual could not be identified as either staff or guest. The expert team suggest customer service training would also be of benefit to resorts. They also felt that promoting the community as Lake Country puts Faribault in direct competition with the well-established northern Minnesota brand and recommended a marketing focus on the historic and recreational aspects of Faribault.



Active Lifestyle and Wellness Tourism: Next Steps for Consideration

Short-Term Project Ideas and Strategies

- Offer hospitality training.
- Enhance signage visibility for the state trailhead and tourism information sites.
- Keep bushes and trees near signs groomed.
- Develop educational offerings targeted toward visitors at River Bend Nature Center.
- Promote bird watching and create a birding list.
- Improve way finding signage to the nature center and other recreational facilities.
- Have availability of rental bike and helmets downtown or at the trailhead. This can be a private concession or a public system like www.niceridemn.org.
- Package recreational opportunities with lodging and dining options to target niche markets.



Long-Term Project Ideas and Strategies

- Explore development of lodging/camping at the nature center.
- Improve safe connections between the state and local bike trails.

Trend: Accessible Travel

Accessible travel is a global tourism trend. The World Health Organization estimates that approximately 15% of the world's population has a physical, mental, or sensory disability (2011). In the United States, the 2010 census data suggests that nearly one-fifth of the U.S. population has a disability.

A 2015 study conducted by Mandala Research, LLC, for the non-profit Open Doors Organization, suggests that more than 26 million adults with disabilities traveled for pleasure or business between 2013 and 2015, spending \$17.3 billion on travel. Acknowledging that these individuals typically travel with at least one other adult, the potential impact is double. In this study, disability is defined as having blindness, deafness, or a condition that substantially limits one or more basic physical activities such as walking, climbing stairs, reaching, lifting, or carrying. Individuals who also have cognitive disabilities were included as well.

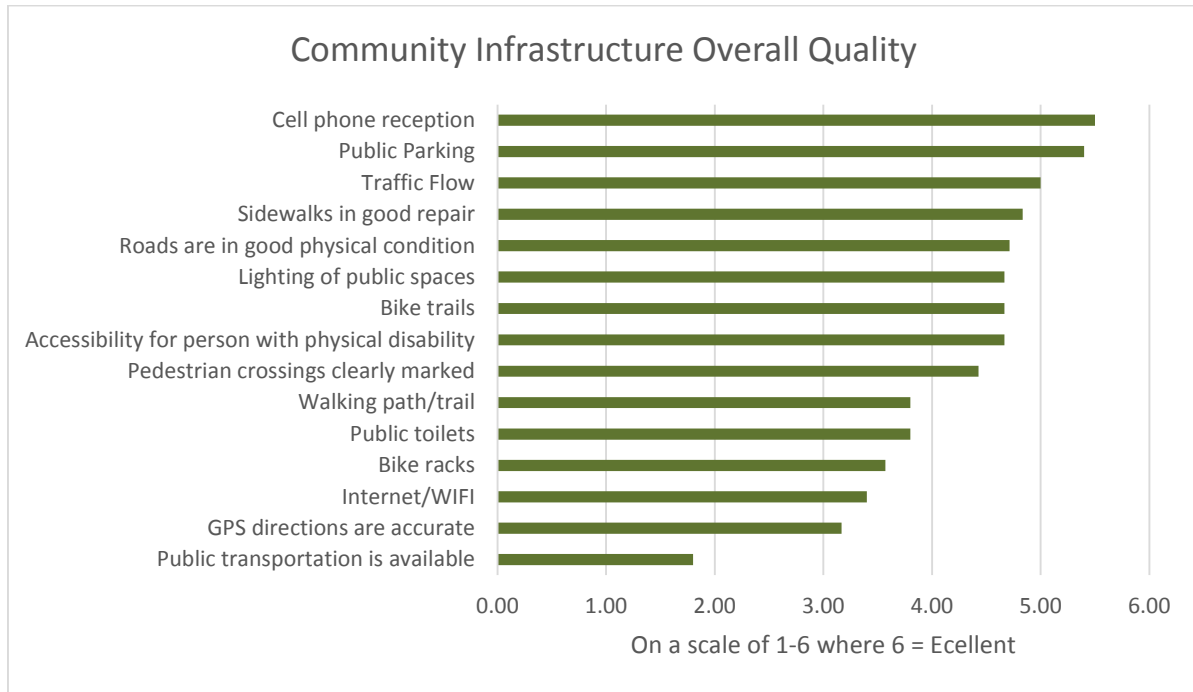
Accessible tourism is not just about providing access to visitors with disabilities, but it is also about making visitors feel safe and welcome. Anticipating and meeting the needs of all visitors and encouraging the use of universal design concepts will create products and environments that are usable by all people. This initiative benefits visitors and residents alike, including families with young children, the aging population, and those temporary disabilities.

Findings from Observations of Expert Team Visitors

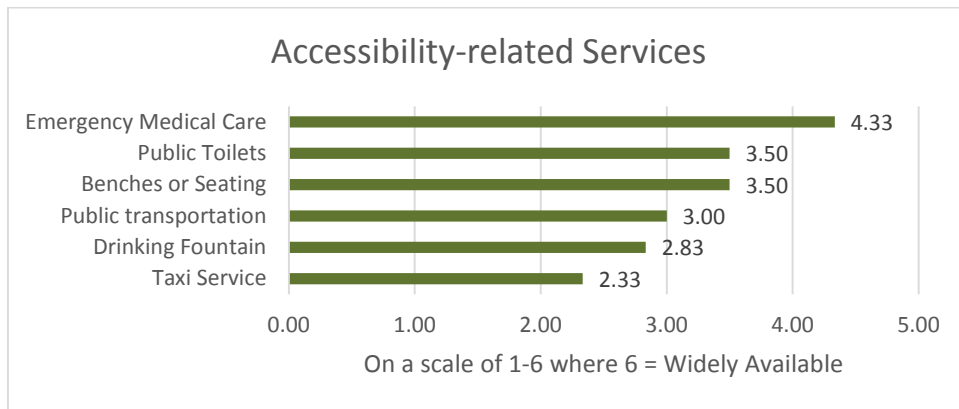
Again, Faribault is in an enviable position by having the Minnesota State Academy for the Blind (MSAB) and Minnesota State Academy for the Deaf (MSAD). Working with these organizations can help ensure Faribault is accessible and welcoming to all visitors.

Having the community infrastructure in good repair is critical for all users, but especially those with limited vision or mobility. Team members found that some aspects of the community, like park

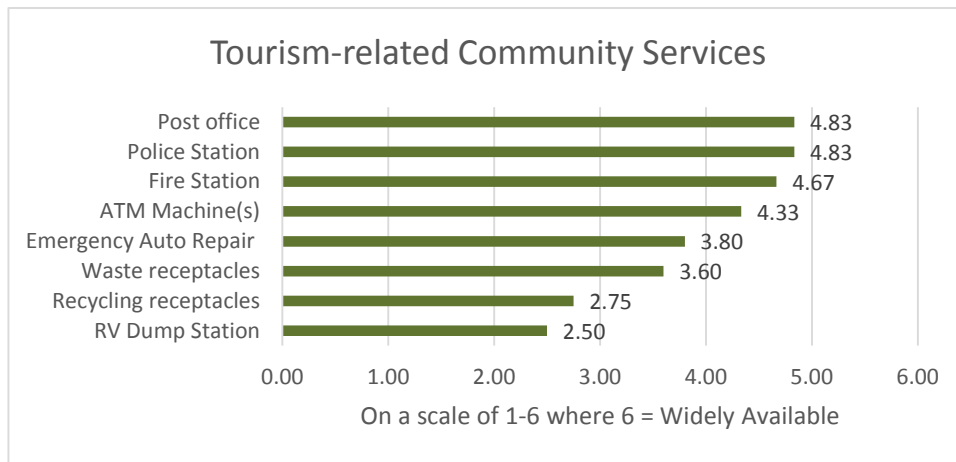
seating areas and drinking fountains, were not fully accessible. For example, in Central Park, the seating is on grass which could be difficult to navigate.



While some services are particularly important for people with disabilities, having services to meet their needs enhances the experience for all visitors. This means going beyond the Americans with Disabilities Act (ADA) requirements by utilizing the latest research and technology to create welcoming environments.



Other important community services for visitors currently included in visitor information and maps include convenient (and free) parking, easy access to local government amenities, such as the post office or community center, connectivity to WIFI or internet, police and fire station, and the availability of places to worship. Access to good cell phone coverage is also a priority for visitors.



The two schools in Faribault are both resources to the community as well and generate a segment of the VFR market. The Minnesota State Academy for the Blind (MSAB) holds two summer events each year: a Parent Child Institute and an Alumni reunion. The Minnesota State Academy for the Deaf (MSAD) held a Family Learning Event in the past. According to their website, MSAD enrolls approximately 135 students each year with nearly 60% of these being residential students who leave on the weekends to be with their families. Both schools are an opportunity for the community to market Faribault's attractions to these families.

Accessible Tourism: Next Steps for Consideration

Short-Term Project Ideas and Strategies

- Work with both the Minnesota State Academy for the Deaf and the Minnesota State Academy for the Blind to provide links to the Visit Faribault website on their websites' Community Pages. This will facilitate marketing tourism attractions to these families.
- Consider a periodic survey of school parents from the State Academies for the Deaf & Blind to determine what tourism amenities they want, what they aren't getting, and what is their assessment of local amenities, customer service, shopping availability, etc.
- Offer customer service training throughout the community. It is particularly important to consider the needs of students with disabilities and their families who are already visiting and living in the community.

Long-Term Project Ideas and Strategies

- Develop a plan to identify and address the accessibility needs of diverse travelers.
- Encourage businesses to promote it if a second language is spoken by staff members.

2) Marketing Tourism in Faribault

Current Marketing Efforts

Faribault currently has good marketing efforts including websites and collateral materials. In addition to Faribault specific marketing, the Faribault Area Chamber of Commerce and Tourism recently began a new collaboration with Northfield and Owatonna on a regional marketing effort that has introduced a new brand and website (www.minneroadtrip.com).

There are opportunities to enhance Faribault's visibility both on the Internet and within print literature. Utilizing the free resources offered through Explore Minnesota Tourism is a short-term opportunity. Current data on tourism marketing impact and market research is needed to inform decisions going forward.

This section will first provide an overview of market research, followed by information about three trends:

- Online Presence and Social Media
- Multi-Generational Tourism
- Niche Markets

Market Research

Focusing on who is currently visiting the community should be a priority for Visit Faribault. The community has an anecdotal understanding of current visitors, but data about who is coming and staying in local lodging facilities was not available during this study. Knowing more detail about who Faribault visitors are, where they come from, occupancy rates, average spend, retail purchases, and their needs and wants will provide a stronger platform to develop an informed tourism development strategy—and a baseline from which to measure growth and success.

A first step is working with local businesses to identify visitors from registration forms, guest books, and even purchase receipts. For example, seek zip codes from lodging properties and campgrounds. Zip codes give immediate information to both businesses and Visit Faribault about the geographic origin of their guests. This information can be used to target marketing efforts geographically. Zip code data also enables businesses to further segment their markets based on demographic and psychographic parameters for laser-focused marketing.

As one expert visitor noted, “Probably the single most important thing Faribault could do is conduct a visitor profile study across a 12-month period to really get an understanding about who is coming, why, etc. Without this solid information, marketing is inefficient and possibly ineffective. If you are not clear about who is coming, where do you place your message about Faribault? If you don't know what they seek, how can your message hit the mark? The findings will inform community marketing efforts, as well as potential business development.”

A visitor profile is worth every penny, if crafted appropriately, to build the foundation for future branding, marketing, and development plans. Visit Faribault might also consider partnering with nearby destination communities like Owatonna and Northfield to create a regional visitor profile. There are potential shared visitors and synergies to be gained in marketing the region, and a regional visitor profile could also reduce costs for each community.

Trend: Online Presence and Social Media

According to the 2015 “State of the American Traveler” report by Destination Analysts, 48.1% of U.S. travelers reported using social media for trip planning in the previous 12 months, and 45.5% used user-generated content when planning their trips. This fact points to the need for businesses and attractions to monitor and respond to comments in social media.

Destination Analysts also found that only 32% of American travelers reported using a destination marketing organization website for trip planning information. Marketing campaigns increasingly require strong social media strategies, in addition to website and traditional print literature to reach current and potential visitors.

Findings from Observations of Expert Team Visitors

Prior to visiting Faribault, the expert team was asked to review Faribault’s online presence through various websites.

Expert team members had mixed reviews of the Visit Faribault website. The information provided is professionally laid out, however it didn’t overly inspire a desire to visit. The page doesn’t create a lot of excitement and was difficult to navigate. Information provided seems to be geared more towards a local audience and is more about the businesses that exist within Faribault. Tourists would be looking to find out more about what they might be able to experience or see and research shows that great images and descriptions drive decisions. Where might one be able to find a good meal in a restaurant that is innovative, or situated somewhere unique? What history the town has and why they should care about it or be interested in it? If there it seems like much more than they can do in a day - where might they be able to stay that is unique, situated close to the city core? While hotels are listed with the name, logo and basic information one might need, the layout and descriptions do not inspire wanting to stay or eat at local restaurants as much as they could.

Another information source frequently used by travelers are social media websites like Trip Advisor. The expert team found complaints about some of the lodging facilities that had not been addressed online by the business. How businesses address concerns from former guests can impact visitors’ decisions to come to or stay in Faribault.

The number and diversity of restaurants found online in Faribault was impressive, as were the positive reviews on the quality of food. Several establishments were noted, however, to need an exterior or interior facelift.

On the VisitFaribault.com website, there appeared to be intriguing events in late summer and fall, but links were not provided to obtain details. A festival and events schedule, for example, could be used for visitors to quickly obtain information.

For many travelers using online resources, including Millennials, social media platforms such as Instagram, Twitter, and video-blogs are important tools. Visit Faribault can use these platforms to promote the community and create short videos for the website.

The Explore Minnesota website provides another way to make community and attractions visible. Make sure that events are included on the calendars. Post a strong image on www.exploreminnesota.com by using available free photos. The community and tourism entities, like lodging and attractions, can also take advantage of these free opportunities to post photos with a description.

Online presence & Social Media: Next Steps for Consideration

Short-Term Project Ideas and Strategies

- Ensure all businesses and attractions are correctly located on Google Maps and Yelp. Increasingly, visitors are using mobile GPS devices to locate attractions, stores, and services. Because Android phones use Google Maps and iPhones use Yelp, it is critical that locations are correct on both platforms.
- Encourage businesses to claim their business on Google Places and Yelp to add information (hours, photos, menus, etc.), as well as respond to reviews.
- Utilize the free resources available from Explore Minnesota Tourism.
- On the VisitFaribault.com website:
 - Include a 12-month calendar where visitors who are travelling long distances (for example, parents at Shattuck-St Mary's) can plan the timing of their visit to attend certain events. Also provide links to the websites for events where visitors can obtain details (festival schedule, order tickets, contact phone number, etc.).
 - As a way to encourage overnight stays might Faribault consider placing information by geographic location on a map? By showing both lodging, restaurants and attractions by geographic area – the historic core, versus close to Hwy 35, or in the lakes area – (all of which are geographically distinct) may help visitors make better decisions about if or where to eat or stay.
 - Encourage locations to provide a professional and enticing image (or help them obtain one) that speaks to the experience, the food, the atmosphere, or the unique location. The assumption in seeing how businesses are listed in alphabetical order and with all the same basic information is that it ensures equal treatment of those businesses – however many visitors or people planning their travels make decisions based on visual cues, inspiring information, and an emotional connection. Helping your businesses to develop that, will not only boost their business, but will help others in the area grow as well.
- In the Visit Faribault magazine, include the addresses for attractions so those using GPS devices can drive to the locations. In addition, include days and hours that tours are available.

Long-Term Project Ideas and Strategies

- Encourage businesses to make their website to be mobile-friendly. Travelers seeking information will be on mobile devices, so websites need to be readable on small devices like cellular phones.
- Consider opportunities to tell stories about Faribault. One idea suggested by the expert team is to create short video interviews with residents. Local schools and classes could be enlisted to develop this project, conduct interviews, and produce videos. This will also build social capital in the community by connecting generations.

Trend: Multi-Generational and Niche Tourism

One of the strongest trends in the 21st century is multi-generational travel. A multi-generational trip is defined by AARP as a family trip that includes three or more generations traveling to a destination to vacation together.

According to research conducted in 2011 by Preferred Hotel Group, more than 40 percent of all active U.S. leisure travelers took at least one multi-generational trip during the previous 12 months. Making memories and spending time with family are cited as primary reasons for multi-generational travel. American Automobile Association (AAA) research in 2014 found that more than one-quarter of Americans took multi-generational trips that included three generations, and an additional 15 percent were grandparents planning to take their grandchildren on vacation.

Targeting specific generations, such as Baby Boomers (those born between 1946 and 1964) or Millennials (those born between 1980 and 1997, according to Pew Research), is also a popular approach for destinations because of similarities within the generational cohorts.

Visit Faribault has identified Millennials as a potential priority market. Millennials refer to the population ages 18-34 as of 2015 and is now the largest population cohort in the United States (Pew Research Center). According to research by MMGY Global (2015), 33% of Millennials took at least one vacation within 50 miles of their home in 2014, and one-third indicated their choice was driven by a desire to save money for a more substantial vacation in the year ahead. The study further suggests that 6 in 10 prefer to spend their money on experiences rather than material things.

Certainly there is opportunity for generational marketing to both Millennials and Baby Boomers alike, though. According to Destination Analysts Traveler Psychographic Intensity (2014), Millennials are active, highly connected travelers with a desire for urban culture and culinary experiences.

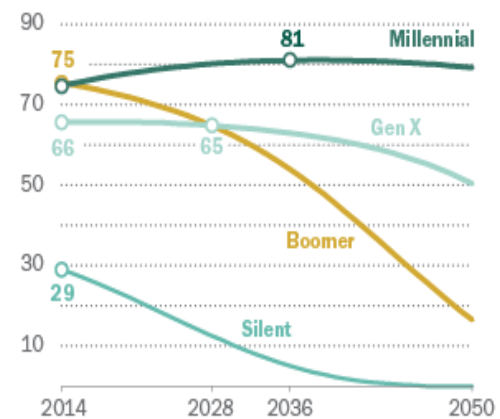
Baby Boomers are more interested in less active, rural experiences that yield a sense of exploration. Both generations place high value (65%) on authenticity and on engaging with the arts and cultural assets of a destination (65% for Boomers and 72% for Millennials).

In Minnesota, Millennials comprise some 23 percent of the population according to the Minnesota State Demographic Center (2015) and exhibit racial, ethnic and cultural diversity. For example, young adults of color represent 22% of Minnesota's 18-34 year olds, the first adult cohort in Minnesota in which more than 1 in 5 is a person of color (Henderson & Egbert, 2015). More information about Millennials is found in the Appendices.

While there are common attitudes and interests within each generational cohort, it may be beneficial to further segment within each cohort to address more targeted needs. For example, within the Millennials generation, the needs of a single male in his mid-twenties are different from those of a couple with small children. These may represent niche markets for Faribault. With a strong set of existing tourism assets, Faribault can meet the needs of both generational cohorts.

Projected Population by Generation

In millions



Note: Millennials refers to the population ages 18 to 34 as of 2015.

Source: Pew Research Center tabulations of U.S. Census Bureau population projections released December 2014

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The expert team identified several niche markets that align with key tourism trends discussed above. One or more of these can be effectively targeted in a short-term effort to track impact.

Niche Markets

Targeting niche markets is a viable approach for Faribault to maximize limited marketing dollars. Visit Faribault staff indicated the organization is focusing on Baby Boomer and Millennial audiences, and they identified three niche markets for which they would like secondary research on: Millennials, bike tourism, and motorcycle tourism. Brief overviews of these three niche markets. These overviews are included in Appendix C.

Bike tourism is a key market for Faribault. As discussed earlier with the community’s existing trailhead and city biking opportunities, Faribault can target increased bike tourism. The community also has the potential to be part of a larger trail system as trails are built and links are made to other regional communities. Grab this and run with it. It’s also very green and sustainable...an appealing aspect for both residents and visitors. Explore Minnesota Tourism and PedalMN provide a number of resources to assist communities through the Explore Minnesota Tourism website listed in the resources section of this report.

Motorcycle Tourism is an emerging trend that Faribault can capitalize on with amenities that motorcyclists already seek out—nice routes/roads to connect to other destinations, dealerships, courses/classes, dining, and attractions.

Limited information exists about recreational on-road motorcycle tourism. A study by Research Resolutions & Consulting Ltd for the Tourism Northern Ontario Canada (2014) found that Canadian Motorcycle tourists engage in a number of activities including camping (34%), dining in high quality restaurants (28%) and visiting historic sites or buildings (14%). The study also found that American motorcycle tourists are more likely to participate in cultural activities such as visiting museums (24%), cultural festivals (36%) and culinary experiences (39%).



The State of Victoria Australia put together a strategic plan (2013) for addressing this emerging market. In this report, feedback from stakeholders is cited suggesting that motorcycle tourists have unique characteristics including:

- They are more likely to make last minute decisions
- They are dependent on external factors including weather and riding conditions.
- The actual travel experience is the overarching motivator.
- Riders enjoy new routes and destinations
- They seek information about the destination and the technical road conditions.

Faribault has an active Harley Davidson dealership on I-35 that holds regular classes for new riders. This is a potential market of people who may not know much about Faribault but are in the area for a purpose they are passionate about. Faribault is also a great destination on the way to and from ‘the river’ where motorcyclists access towns like Red Wing. There are great highways and county roads in the area. Explore ways to work with Harley Davidson to capitalize on this and work with local dining and gas stations to promote tourism opportunities for visitors that visit on a motorcycle.

Group Tours was identified as an additional opportunity for Faribault. The community currently serves approximately 25-30 bus tours a year. This could be a growing market for Faribault to develop further by offering new tours for repeat bus groups, maintaining a database, and marketing to new group tours, not just “senior citizen groups or red-hat-ladies tours” (as noted by the community). Faribault could also offer more diverse tours around interests including agritourism and horticulture, as well as utilizing the tourism assets of Faribault, such as the cheese caves and seed companies.

Business travel in Faribault encompasses a number of large and small businesses, including Sage glass, SSM, and Faribault Woolen Mill. These businesses, along with others in the community, bring clients and vendors to town. Additionally, smaller businesses like funeral homes, the nature center, or the regional hospital and county government bring visitors into the community—both day visitors and overnight. Work with these businesses to understand their visitors’ needs and then create an offering, such as an activity package, for visitors. These packages can be tracked and measured for effectiveness.

Multi-Generational and Niche Marketing: Next Steps for Consideration

Short-Term Project Ideas and Strategies

- Target one or two niche markets and track ROI.
- Create packages targeted to niche markets (business travelers, multi-generational) that include activities such as a bike rental, golf fees, gym access, and a brew or dinner.
- Leverage the Highway I-35 pass-by market by promoting Faribault and county roads as interesting alternate routes.
- Create suggested rides routes targeted to motorcycle visitors.
- Include road information and technical road information on the Visit Faribault site.
- Link to current road conditions at the Minnesota Department of Transportation website.
- Develop two or three itineraries for group tours.
- Work with Explore Minnesota on reaching the group tour market.

Long-Term Project Ideas and Strategies

- Promote local tourism opportunities to residents to reach the VFR market.
- Explore creation of a regional motorcycle ride event.
- Establish a marketing plan to reach targeted markets.
- Track and report outcomes to stakeholders.
- Identify regional marketing opportunities with nearby communities for greater reach.

CONCLUSION

Faribault has many existing assets and a good foundation of tourism marketing expertise that position it well for enhanced tourism development. The key for Faribault is tweaking existing assets and efforts to align with current tourism trends. Focusing on actions that support the Community Vision goals will establish tourism as a primary economic engine for Faribault. A Visitor Profile of current visitors will help the community understand who is coming and their needs and interests. These markets can then be more targeted with additional segmentation. Targeting Baby Boomers and Millennials with specific messaging via and concentrating on two or three niche markets will enable Visit Faribault to maximize marketing spending and track results. Establishing tracking methods and working with local businesses and attractions to implement these marketing efforts will help Visit Faribault be even more effective in tracking results.

Longer-term tourism development efforts to enhance the historic downtown district will position Faribault as a destination for multiple markets. This includes expanding the unique dining, entertainment, and shopping options and helping businesses extend their hospitality. Linking these efforts with the range of available cultural and recreational amenities will create a quality leisure experience that will hold visitors and invite residents to further enjoy their community assets.

RESOURCES

- Explore Minnesota Tourism offers a variety of information, marketing opportunities, assistance, and grants.
 - www.industry.exploreminnesota.com
 - <http://www.exploreminnesota.com/highways-byways-backroads/routes/> is a good resource for information/development of local motorcycle routes, etc.
 - Lisa Havelka, Southern Regional Manager. 507.389.2683, lisa.havelka@state.mn.us
- Minnesota Historical Society manages the Minnesota Historical & Cultural Heritage Grants: <http://legacy.mnhs.org/grants>
- The Minnesota Trails website is a continuation of Minnesota Bike Trails & Rides, published quarterly in cooperation with the Parks & Trails Council of Minnesota, a non-profit organization that acquires, protects, and enhances critical lands for public enjoyment. Their purpose is to guide people to these places by telling the story of the people who use, manage, and support these special places. <http://mntrails.com>
- Society for the Accessible Travel and Hospitality (SATH) provides facts and resources regarding this market: www.SATH.org
- Southern Minnesota Initiative Foundation provides grants: <http://www.smifoundation.org/>
- University of Minnesota Resources:
 - SE Regional Sustainable Partnership invites communities to propose projects that integrate and extend sustainable practices including tourism. Contact Erin Meier at tegtm003@umn.edu
 - University of Minnesota Tourism Center provides examples of tourism research projects and previous projects conducted in Minnesota. www.tourism.umn.edu
 - University of Minnesota Extension offers classes for businesses on e-marketing: <http://www.extension.umn.edu/community/retail/e-marketing/>
 - The Center for Urban and Regional Affairs offers a Community Assistantship Program gives student researchers the opportunity to apply their research and technical skills in real world community challenges; funding is available to help pay student's salaries and expenses: <http://www.cura.umn.edu/CAP>
 - University of Minnesota College of Design has a number of centers that offer project opportunities for students and faculty to work with communities on local needs. <http://centers.umn.edu/unit/college-design>

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APPENDICES

Appendix A: US Travel Answer Sheet: Facts about a Leading American Industry That's More Than Just Fun

Appendix B: Tourism and Minnesota's Economy

Appendix C-E: Student-generated market overviews on Millennials, motorcycle and bicycle tourism

U.S. TRAVEL ANSWER SHEET

FACTS ABOUT A LEADING AMERICAN INDUSTRY THAT'S MORE THAN JUST FUN



LEISURE TRAVEL

- Direct spending on leisure travel by domestic and international travelers totaled **\$644.9 billion** in 2014.
- Spending on leisure travel generated **\$96.6 billion** in tax revenue.
- More than 3 out of 4** domestic trips taken are for leisure purposes (78%).
- U.S. residents logged **1.7 billion** person-trips* for leisure purposes in 2014.
- Top leisure travel activities for U.S. domestic travelers: (1) visiting relatives; (2) shopping; (3) visiting friends; (4) fine dining; and (5) beaches.

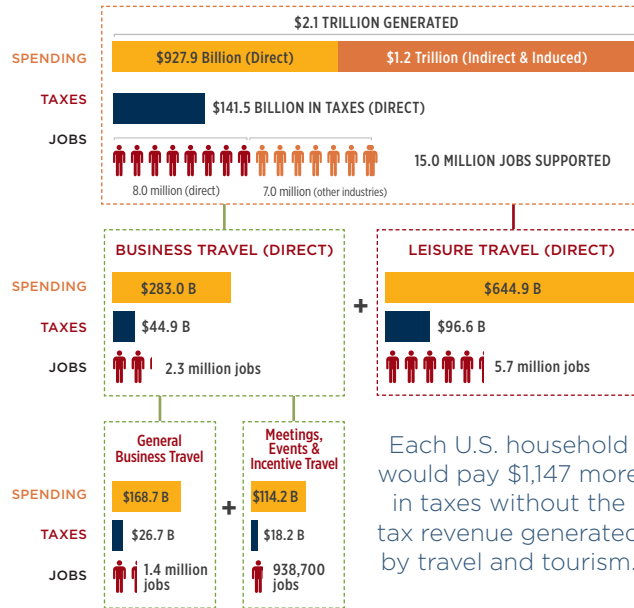
BUSINESS TRAVEL

(Including Meetings, Events and Incentive)

- Direct spending on business travel by domestic and international travelers, including expenditures on meetings, events and incentive programs (ME&I), totaled **\$283.0 billion** in 2014.
- ME&I travel accounted for **\$114.2 billion** of all business travel spending.
- U.S. residents logged **452 million** person-trips* for business purposes in 2014, with 36.7% for meetings and events.
- For every dollar invested in business travel, businesses benefit from an average of **\$9.50** in increased revenue and **\$2.90** in new profits (2012).

* Person-trip defined as one person on a trip away from home overnight in paid accommodations or on a day or overnight trip to places 50 miles or more (one-way) away from home.

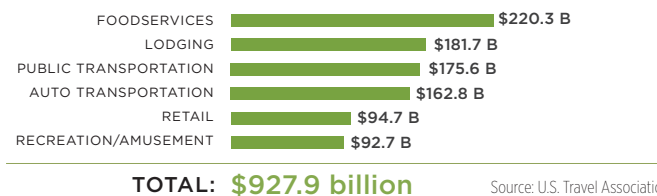
U.S. TRAVEL INDUSTRY IMPACT



Source: U.S. Travel Association
Note: Direct spending totals do not include international passenger fares
= 1 million jobs

Each U.S. household would pay \$1,147 more in taxes without the tax revenue generated by travel and tourism.

SOURCES OF TRAVEL SPENDING



INTERNATIONAL TRAVEL

- In 2014, U.S. travel exports (travel and passenger fare receipts) totaled **\$180.7 billion** and U.S. travel imports (travel and passenger fare payments) totaled \$137.0 billion, creating a trade surplus of **\$43.7 billion** in favor of the U.S.
- The U.S. received **73.9 million** international arrivals in 2014. Of those, approximately **34.4 million** were from overseas markets and **40.3 million** were from Canada and Mexico.
- The United States' share of total international arrivals is **6.4%** (down from **7.5%** in 2000).
- International travel spending directly supported about **1.1 million** U.S. jobs and wages of **\$29.2 billion**.

Direct spending by resident and international travelers in the U.S. averaged \$2.5 billion a day, \$105.8 million an hour, \$1.8 million a minute and \$29,398 a second.

- Each overseas traveler spends approximately **\$4,300** when they visit the U.S. and stay on average **17 nights** (2012).
- Overseas arrivals represent **46%** of all international arrivals, yet account for **80%** of total international travel receipts.
- Top leisure travel activities for overseas visitors: (1) shopping; (2) sightseeing; (3) fine dining; (4) national parks/monuments; and (5) art galleries/museums.

TOP 5 INTERNATIONAL MARKETS TO USA (2014 ARRIVALS)

ORIGIN OF VISITOR	2014
Canada	23.0 million
Mexico	17.3 million
United Kingdom	4.0 million
Japan	3.6 million
Brazil	2.3 million

TOP 5 HIGH-GROWTH MARKETS THRU 2019 (forecasted)

ORIGIN OF VISITOR	ARRIVALS % CHANGE '19/'13
China	171.7%
Colombia	71.8%
India	47.3%
Brazil	43.0%
Sweden	34.0%

Source: U.S. Travel estimates based on U.S. Department of Commerce - National Travel and Tourism Office

U.S. TRAVEL ASSOCIATION

BY THE NUMBERS

(all data 2014 unless indicated otherwise)

\$2.1 trillion: Economic output generated by domestic and international visitors (includes \$927.9 billion in direct travel expenditures that spurred an additional \$1.2 trillion in other industries)

15.0 million: Jobs supported by travel expenditures (includes 8.0 million directly in the travel industry and 7.0 million in other industries)

\$221.7 billion: Wages shared by American workers directly employed by travel

\$141.5 billion: Tax revenue generated by travel spending for federal, state and local governments

2.7%: Percentage of nation's gross domestic product (GDP) attributed to travel and tourism

No. 1: Where travel ranks among all U.S. service exports

1 out of 9: U.S. jobs that depend on travel and tourism

No. 7: Where travel ranks in terms of employment compared to other major private industry sectors

84%: Percentage of travel companies that are considered small businesses (2012)

2.1 billion: Number of person-trips* that Americans took for business and leisure purposes

73.9 million: Number of international arrivals in the U.S. in 2014, including 33.6 million from overseas markets

Travel is among the **top 10 industries** in 49 states and D.C. in terms of employment

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The U.S. Travel Association is the national, non-profit organization representing all components of the travel industry that generates \$2.1 trillion in economic output. It is the voice for the collective interests of the U.S. travel industry and the association's 1,350 member organizations. U.S. Travel's mission is to promote and facilitate increased travel to and within the United States. For more information, visit www.ustravel.org

Economic Impact: Sales and Jobs

Travel/tourism in Minnesota generates:

SALES

- \$13 billion in gross sales
- More than \$35 million a day

JOBS

- 250,000 full- and part-time jobs
- 11% of total private sector employment
- Almost \$4.5 billion in wages

REVENUE

- \$840 million in state sales tax
- 17% of state sales tax revenues

Note: Data for leisure & hospitality sector, 2013

Growth in the tourism industry

Sales at leisure and hospitality businesses grew 49% from 2003 to 2013, including 4% annual growth for 2013.



Leisure & Hospitality Gross Sales (in billions) 2003-2013

Impacts of state tourism advertising

- 3.1 million Minnesota trips
- \$320.2 million traveler spending
- \$29.7 million direct state and local taxes
- 2.0 million additional intended trips in next 12 months
- \$68 to \$1 traveler spending return on ad investment
- \$6 to \$1 state and local tax return on ad investment

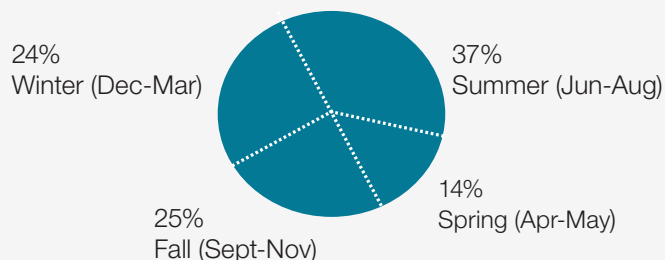
Note: Impacts of Explore Minnesota's spring/summer 2014 advertising

Minnesota ranking among states

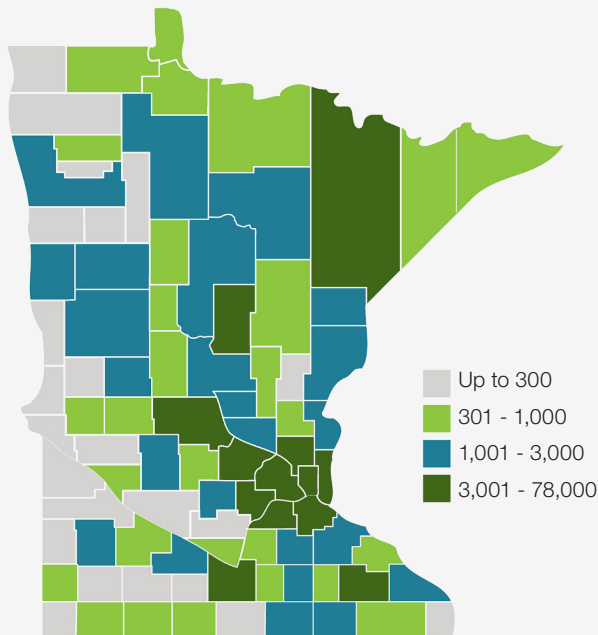
The economic impact of travel & tourism in Minnesota ranks significantly higher compared to other states in:

Traveler Spending	22 nd
Travel-Generated Employment	18 th
Travel-Generated Payroll	14 th
Travel-Generated Tax Receipts	10 th

Traveler expenditures by season



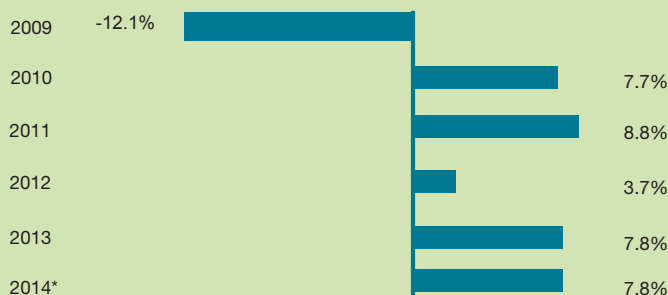
Leisure & hospitality jobs by county, 2013



- Travel & tourism creates jobs and generates sales in every county of Minnesota.
- Tourism jobs represent all levels of employment, from important entry-level service jobs to high-paying executive positions.
- Traveler spending indirectly supports jobs in many other industries, as well, from financial services to printing.

Change in room revenue

Source: STR (Smith Travel Research Inc.)



*year to date through November

After a decline in room revenue in 2009 due to the recession, Minnesota lodging properties have seen annual increases in room revenue.

Traveler spending by sector

Spending during Minnesota's 69 million annual person-trips (including overnight and day trips) is distributed throughout the economy:

- Food 23.5%
- Lodging 21%
- Retail 17%
- Recreation 16%
- Transportation 16.5%
- Second Homes 6%

Find more information at: industry.exploreminnesota.com

Sources: Minnesota 2014 Tourism Advertising Evaluation, Longwoods International; The Economic Impact of 2013 Travel in Minnesota, Tourism Economics; The Economic Impact of Expenditures by Travelers on Minnesota, June 2007-May 2008, Davidson-Peterson Associates; Minnesota Department of Revenue, 2013; Minnesota Department of Employment and Economic Development, 2013; Bureau of Labor Statistics; U.S. Travel Association.

Economic Impact by County

Minnesota's Leisure and Hospitality Industry, 2013

	Gross Sales	Sales Tax	Private Sector Employment		Gross Sales	Sales Tax	Private Sector Employment
Minneapolis - St. Paul Area				Southern Minnesota			
Anoka	\$488,524,019	\$33,078,113	11,883	Big Stone	\$4,442,658	\$316,833	129
Carver	\$158,938,738	\$10,397,111	3,738	Blue Earth	\$167,507,024	\$11,020,846	4,003
Chisago	\$57,384,993	\$3,700,061	1,431	Brown	\$37,650,837	\$2,480,129	1,147
Dakota	\$780,519,996	\$51,586,770	16,865	Chippewa	\$14,980,984	\$1,049,987	381
Hennepin	\$4,394,789,540	\$290,620,589	77,491	Cottonwood	\$9,779,730	\$658,587	286
Isanti	\$32,501,615	\$2,272,064	907	Dodge	\$11,050,261	\$762,615	402
Ramsey	\$1,858,794,999	\$120,493,932	27,015	Faribault	\$10,813,176	\$712,545	298
Scott	\$333,951,143	\$18,672,786	6,395	Fillmore	\$20,028,596	\$1,419,765	624
Washington	\$445,357,622	\$29,972,298	10,695	Freeborn	\$43,129,322	\$2,907,741	1,090
Wright	\$197,830,954	\$11,675,309	4,419	Goodhue	\$70,052,029	\$4,769,331	1,730
Region Total	\$8,748,593,619	\$572,469,033	160,839	Houston	\$10,213,408	\$657,311	259
Central Minnesota				Jackson	\$11,031,326	\$711,136	320
Aitkin	\$19,782,724	\$1,363,903	487	Lac Qui Parle	\$3,951,985	\$282,207	95
Benton	\$53,833,242	\$3,543,440	1,310	Le Sueur	\$23,550,192	\$1,479,958	625
Crow Wing	\$205,526,213	\$12,933,542	3,871	Lincoln	\$3,892,940	\$294,311	112
Douglas	\$109,888,733	\$7,201,909	2,159	Lyon	\$68,909,123	\$3,158,150	1,359
Grant	\$2,251,179	\$133,263	60	Martin	\$31,269,497	\$2,087,870	797
Kandiyohi	\$79,035,438	\$4,929,350	1,591	Mower	\$51,613,574	\$3,335,967	1,228
McLeod	\$40,747,054	\$2,804,190	1,294	Murray	\$7,131,770	\$484,729	162
Meeker	\$18,074,888	\$1,226,557	460	Nicollet	\$35,923,146	\$2,454,219	921
Mille Lacs	\$49,431,459	\$2,629,880	875	Nobles	\$27,313,564	\$1,877,173	705
Morrison	\$39,850,059	\$2,727,613	1,080	Olmsted	\$427,247,843	\$28,506,103	8,072
Otter Tail	\$83,137,509	\$5,606,988	2,106	Pipestone	\$10,374,983	\$705,872	311
Pope	\$13,977,184	\$898,070	327	Redwood	\$26,202,734	\$1,863,589	413
Sherburne	\$81,167,686	\$5,009,985	2,170	Renville	\$7,769,232	\$519,458	260
Stearns	\$297,942,985	\$19,546,700	7,484	Rice	\$151,069,788	\$6,504,917	2,307
Stevens	\$14,923,699	\$851,151	361	Rock	\$10,095,839	\$699,317	283
Todd	\$20,389,306	\$1,400,768	365	Sibley	\$7,788,999	\$562,268	167
Wadena	\$14,230,551	\$965,802	383	Steele	\$67,488,023	\$4,156,374	1,482
Region Total	\$1,144,189,909	\$73,773,111	26,383	Swift	\$8,758,191	\$621,633	229
Northwest Minnesota				Traverse	\$1,842,108	\$132,421	46
Becker	\$71,702,820	\$4,457,921	1,480	Wabasha	\$25,650,338	\$1,728,933	781
Beltrami	\$84,239,681	\$5,414,758	1,943	Waseca	\$13,257,195	\$872,139	401
Cass	\$100,740,225	\$6,295,129	1,785	Watsonwan	\$7,263,532	\$503,877	204
Clay	\$79,122,988	\$4,973,203	1,921	Winona	\$95,921,247	\$6,491,433	2,320
Clearwater	\$5,708,006	\$385,880	159	Yellow Medicine	\$13,002,744	\$503,744	199
Hubbard	\$30,563,260	\$2,031,545	754	Region Total	\$1,537,967,938	\$97,293,488	34,148
Kittson	\$3,023,685	\$217,130	74	Northeast Minnesota			
Lake of the Woods	\$34,148,793	\$1,939,660	487	Carlton	\$62,782,297	\$3,899,703	1,012
Mahnomen	\$14,223,379	\$977,888	104	Cook	\$58,503,168	\$3,721,552	915
Marshall	\$5,329,418	\$402,574	132	Itasca	\$67,905,856	\$4,354,607	1,444
Norman	\$3,145,373	\$210,221	70	Kanabec	\$13,234,583	\$855,592	299
Pennington	\$24,305,923	\$1,669,338	541	Koochiching	\$29,518,777	\$1,944,681	582
Polk	\$52,913,882	\$2,813,487	1,074	Lake	\$31,962,393	\$2,191,267	898
Red Lake	\$2,317,544	\$171,129	66	Pine	\$64,127,734	\$3,418,871	1,003
Roseau	\$20,053,921	\$1,285,307	342	St Louis	\$488,461,365	\$33,168,981	10,525
Wilkin	\$3,896,749	\$296,053	127	Region Total	\$816,496,173	\$53,555,254	16,678
Region Total	\$535,435,647	\$33,541,223	11,059	Minnesota Total \$12,975,526,970 \$839,808,106 250,117			

Notes: State total does not equal the sum of counties or regions because some data is withheld to avoid disclosure of individual businesses; and some state level data is for businesses located outside of Minnesota. The Leisure and Hospitality industry consists of Accommodations; Food Services and Drinking Places; and Arts, Entertainment and Recreation.

Sources: Minnesota Department of Revenue; Minnesota Department of Employment and Economic Development

Produced by Explore Minnesota Tourism, an office of the State of Minnesota. 1/15

TOURISM ASSESSMENT PROGRAM**MARKET OVERVIEW: Millennial Tourism**

By Corryn Bradley, Undergraduate Assistant

INTRODUCTION

Minnesota is home to 1.5 million millennials (ages 18-34) the largest of the generational cohorts (Helmstetter & Tigan, 2014). Millennial travelers took 3.4 more vacations in 2015 than in the past and are willing to “staycation” within 75 miles of home or vacation more locally for day trips or for overnight stays (Bishop, 2015). According to MMGY Research, 33% of millennials took at least one vacation within 50 miles of their home in 2015 (MMGY, 2015). While they are not yet the core spending group for travel, they will be in five to 10 years, and they will bring their habits with them (Barton, 2013). Millennials want to experience the culture of where they are traveling to and expect a full travel experience with memories they can share either with friends or on social media.



Millennials’ travel interests are not limited to just one thing. They are organized, active, and open-minded when traveling (Bishop, 2015). Millennials also differ from other generations in how they spend their leisure time. Travel and activities are planned more quickly than previous generations, and many millennials receive real time updates and advice from their friends on social media that influence their decision-making (Mink, 2014). Millennials prefer activities that offer a good value, while also being entertaining and interactive (Mink, 2014). They also want to take more vacations, but because they are not at peak earning potential yet, they often do not have the funds for lengthy, lavish vacations.

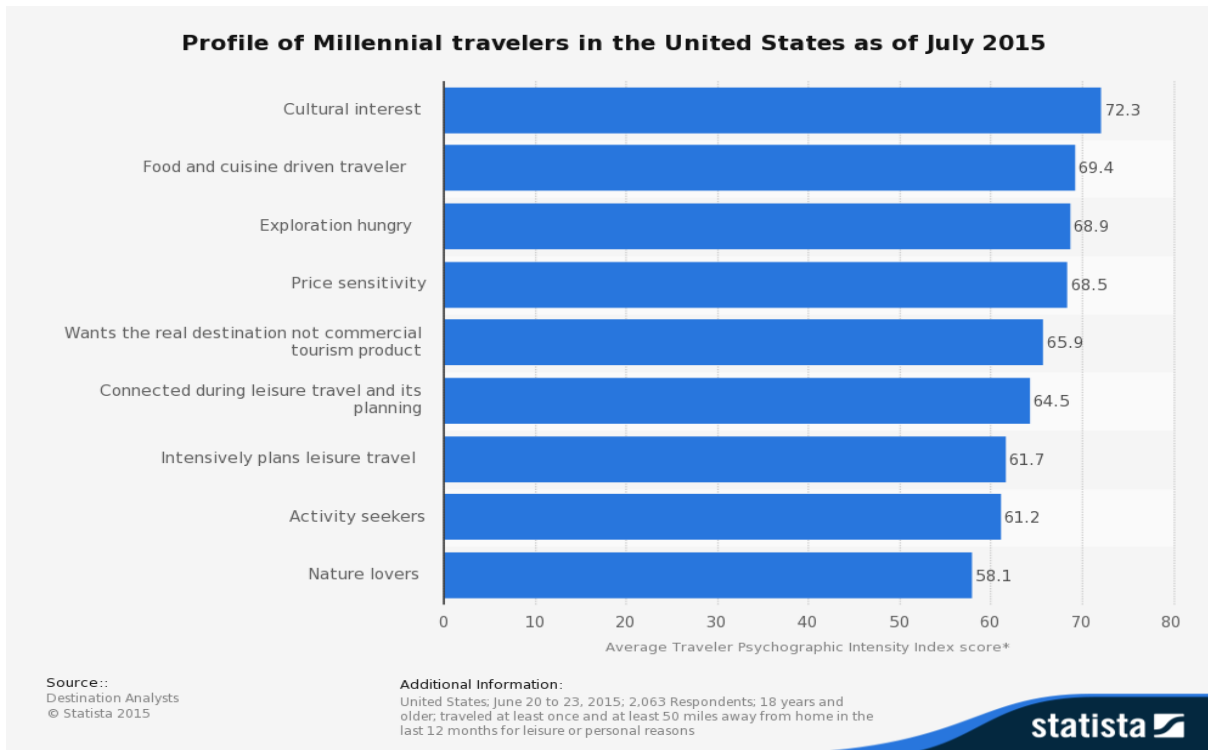


Figure 1. Profile of Millennial travelers in the United States as of July 2015.

Travel Trends

Certain travel trends emerge among millennials. As a highly digital generation, many millennials still use more traditional methods of trip planning, such as using a travel agent (Rafat, 2015). In a survey conducted by The Center for Generational Kinetics, 1,000 U.S. adults were polled, ages 18-65, from September 30 - October 3, 2015. The following results were found:

- *Image is everything*: 27% of millennials have stayed in a hotel to impress someone.
- *Live for now*: 33% of millennials would put off buying a home to take a dream vacation.
- *Foodies & adventurers*: 79% of millennials say they are more adventurous about eating and drinking when traveling than when at home.
- *Old school travel methods*: While 59% of millennials say online ratings and reviews determine their hotel selection, a shocking 35% of millennials would still use travel agents when choosing a hotel.
- *Get rich quick*: 43% of millennials believe you should receive your first rewards program benefit as soon as you sign up.
- *Experience is everything*: 12% of millennials have quit their job to take a vacation or go to an event, such as a concert.
- *Gimme gimme goodies*: 69% of millennials see freebies (such as snacks, sandwiches, or to-go breakfast) as more important than increased loyalty or reward points.

R&R-Recreation and Relaxation

Travel trends among millennials show they value vacations, but they also want adventure and new experiences. Sixty percent of millennials say that experiencing nature is an important part of their leisure travel (Bratton, 2014).

Millennials are open to traveling to more rural places and are asking for how to do so. While vacationing, millennials feel a responsibility to connect to the culture of the destination, while also making some sort of difference (Bratton, 2014). Sixty-one percent of millennials desire quiet, peaceful destinations, but fear losing connectivity and not having enough to do on their vacations (Bratton, 2014). Forty-eight percent of millennials would prefer to visit an urban setting (Bratton, 2015).

Millennials Love Food

Millennials value food and are more likely to travel to places that offer unique and fun culinary experiences (Ashworth, 2012). Examples of culinary experiences that attract millennials are breweries, vineyards, specialty cheese and chocolate shops, as well as any other unique local food experiences. Essentially, they want something that they cannot get anywhere else. Food is another way the millennials distinguish their experiences from everyone else and connect with each other (Ashworth, 2012). There is an increasing trend in millennial culinary tourism. Below are several culinary tourism statistics:

- 51.4% of millennials will not travel to places that do not have good restaurants and food, and 63.9% of millennials desire unique, special, or interesting food experiences when traveling—something they can't get anywhere else. Food is an incredibly important marketing tool.
- 64.8% of millennials do extensive research about destination restaurants prior to traveling.
- 67.8% of millennials want to visit art, cultural, natural history, or science-related museums while traveling.
- 64.4% of millennials attend theater, performing arts, or live music shows when they travel.
- 62.3% prioritize learning about the culture of the destination they are traveling to.

The Social Network

Technology is a key distinguishing factor for millennials, especially when traveling. One-quarter of millennials cite technology as their generation's most unique feature (Pew Research Center, 2010). More than 90% of millennials use the internet frequently and nearly half (41%) have joined social networking sites (Pew Research Center, 2010). According to Benckendorff, Moscardo, and Pendergast (2009), millennials are the first generation to consider themselves global citizens from childhood, in part due to their comfort with technology and their use of social media. Their largest concern next to the quality of the experience itself is not being able to connect to Wi-Fi and share their trip on various social media sites. About 47.7% of millennials feel uncomfortable when they do not have access to emails or texting (Pew Research Center, 2010).

There is also a certain level of trust that millennials have toward travel destinations and accommodations that have semi-popular to very popular social media sites. Millennials use pictures to influence their desire to stay at a certain place or visit a certain location. Social network sites, such as Facebook, make up 47.6% of the research they conduct before deciding where to vacation; if it is a business trip, then reviews will decide where they choose to stay and eat (Francis-Cummings, 2014). Millennials are also drawn to the idea of "making it their own." From the vast amount of information that they have access to, they pick and choose what is the most relevant to them.

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STRENGTHENING MINNESOTA'S TOURISM

The University of Minnesota Tourism Center is a collaboration of University of Minnesota Extension and the College of Food, Agricultural and Natural Resource Sciences.



TOURISM ASSESSMENT PROGRAM

MARKET OVERVIEW: Motorcycle Tourism

By Corryn Bradley, Undergraduate Assistant

INTRODUCTION

The growth of motorcycle tourism is relatively new in Minnesota but filled with opportunity. Motorcycle tourism is already popular in the U.S. and globally in such areas as Europe and Canada and includes both independent motorcycle travelers as well as organized tours. For example, the Edelweiss Bike Travel is a touring company with more than 35 years of experience in motorcycle tourism offering tours in countries around the world including the U.S. (Elvidge, 2014).

Motorcycle Tourism Motivators

There are limited studies on motorcycle tourism to identify demographic characteristics of motorcycle tourists and what they seek. In one study conducted by Tourism Northern Ontario in 2014, American motorcycle tourists were profiled against Canadian motorcycle tourists. It was found that American motorcycle tourists consider motorcycling as the trip driver, with 54% stating that it could be the primary reason for a trip instead of one of many trip activities. The study also found that cultural festivals, culinary experiences and historic attractions were of significant interest to these travellers. Additional activities of interest found in the study are noted in Figure 5.



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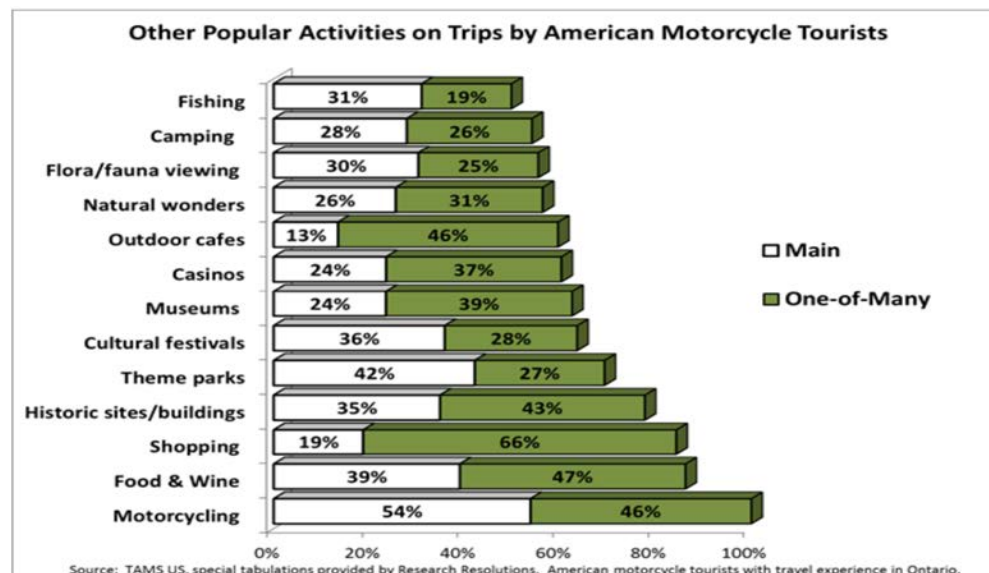


Figure 5: Popular Activities of American Motorcycle Tourists to Ontario

The study also found that American motorcycle tourists to Ontario, compared to Canadian motorcycle tourists, spent more on average, accounting for 71% of motorcycle tourist spending in the region. It is estimated that motorcycle tourists spent between \$16 million and \$20 million in 2013 (Tourism Northern Ontario, 2014).

Motorcycle Ownership

The Bureau of Transportation Statistics of the Research and Innovative Technology Administration released “Motorcycle Trends in the United States” (2009), which is a special report on the current and emerging trends involving street-legal motorcycles within the United States. They found, that during the last decade, there has been a notable increase in the number of motorcycle sales and registrations. Along with this growth, there has been a shift in the demographics of motorcycle users. All of this information is key to developing motorcycle tourism.

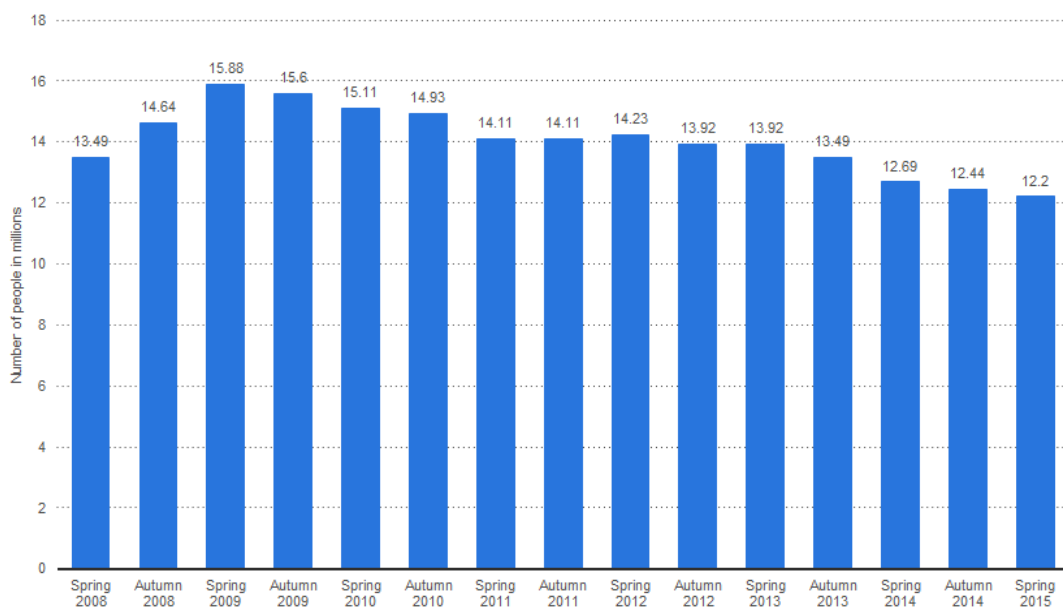


Figure 2. Motorcycle ownership: Number of people living in households that own a motorcycle in the United States (USA) from spring 2008 to spring 2015 (in millions).

An Increase in Bike Sales

Between 2005 and 2007, sales of sport bikes increased from 16 to 19 percent of all motorcycle sales (including off-road bikes, which are not distinguished from on-road motorcycles in the available total sales data); sales of touring bikes increased from 13 to 15 percent; sales of dual-purpose bikes increased from 3 to 4 percent, while sales of off-highway bikes decreased from 27 to 22 percent of total motorcycle sales (Morris, 2009).

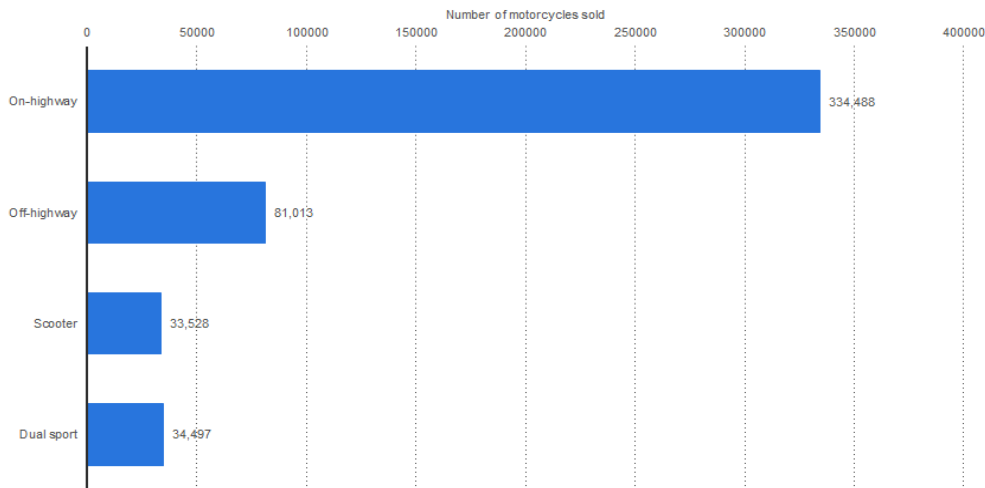


Figure 3. The number of motorcycles sold in the U.S. in 2014, based on the type of cycle.

Owner Demographics

Survey data from the Motorcycle Industry Council on motorcycle owner demographics from 1985 to 2003 reveals a shift toward older owners (Morris, 2009). The median age of owners increased from 27.1 years in 1985 to 41.0 years in 2003. From 1985 to 2003, the percentage of owners 40–49 years old increased from 13.2 to 27.9 percent, and the percentage of owners 50+ years old increased from 8.1 to 25.1 percent (Morris, 2009). Also, survey results for 2003 indicated that 90 percent of owners were male, while survey results for 1998 indicated that 92 percent of owners were male, a slight—but probably not statistically significant—trend consistent with growing female ownership (Morris, 2009).

The increased trend in motorcycle ownership can also be noted in the chart below, which ranks states by the highest motorcycle ownership. According to Bos (2014), Minnesota comes in ninth, with 240,288 motorcycles among a population of about 5,310,658 people, making it approximately 22 people per motorcycle. This is significant, especially because the population of Minnesota is markedly higher than that of other states ranked before it, skewing the data a bit. Also with Minnesota sharing a border with four of the other top ranked states—Wisconsin, North Dakota, South Dakota, and Iowa—the potential for regional motorcycle tourism is good. Motorcycle tourists love riding in comfort and enjoy long distance road trips as much as shorter day trips. They enjoy exploring rural areas, scenic byways, nature reserves, and small towns (Elvidge, 2014).

Rank	State	# Bikes	Population	People per bike
1	South Dakota	69,284	816,598	12
2	New Hampshire	79,266	1,316,807	17
3	Iowa	173,929	3,050,202	18
4	Wisconsin	317,276	5,691,659	18
5	Wyoming	30,351	564,554	19
6	North Dakota	32,654	674,629	21
7	Vermont	30,070	625,909	21
8	Montana	46,996	990,958	21
9	Minnesota	240,288	5,310,658	22
10	Alaska	30,983	714,146	23

Figure 4. 50 States Ranked for Highest Motorcycle Ownership based on people per motorcycle

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STRENGTHENING MINNESOTA'S TOURISM

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TOURISM ASSESSMENT PROGRAM

MARKET OVERVIEW: Bicycle Tourism

By Corryn Bradley, Undergraduate Assistant

INTRODUCTION

Bicycle tourism is a growing aspect of the tourism industry in Minnesota and across the United States. Thousands of people enjoy leisure riding, whether it is a few hours with family or a few days from state to state. Most leisure cyclists will travel to interesting destinations and highly rated trails. As one cyclist describes bicycle tourism, "It is the freedom to go as far as you want to and to go when you want to. There is no better way to connect with people." (Sani, 2014). In a first-ever global survey, the Adventure Travel Trade



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Association (ATTA) studied 200 tour operators and found that bicycle tourism has become more organized and more important for consumers who travel worldwide. Jim Sayer Adventure Cycling Association's executive director (Sani, 2014) points out that more states and regions are calculating the economic benefits of bicycle tourism, as well as single and multi-day events. Many people, especially at the state level, are advocating for bicycle tourism.

Bicycle tourism is defined as, "Any travel-related activity for the purpose of pleasure which incorporates a bicycle" (Building Bike Tourism, 2015). This definition is broad, but purposefully so, because bicycle use is so varied. Bicycle tourism is an emerging way of understanding the array of economic activities that involve a bicycle. It is where business, tourism, and advocacy meet.

Bicycle tourism takes many forms including road touring and day trail rides. There is also some difficulty defining exactly what bicycle tourism *is*. The generally accepted definition of tourism classifies a tourist as someone who travels more than 50 miles from their home and stays overnight (Sani, 2014). However, for communities day travelers can also be an important market and this is true in developing local bicycle tourism. In order to increase bike tourism, considerations and accommodations need to be made for cyclists.

Bicyclist Demographics

A study of touring cyclists in Montana (Nickerson et al, 2013) found that:

- Touring cyclists have a median age of 53 years old, 56% of cyclists have a median household income of \$75,000-150,000, with 10% earning over \$200,000, and 76% of respondents were male.
- 86% of touring cyclists indicated they bring a form of wireless technology with them during their trip. The most common uses for their wireless technology is for weather reports, directions/maps, lodging availability, sharing trip experiences online, and finding hours of operations.
- 92% of respondents indicated they were planning a multi-day cycle trip in the next three years with only 1% stating they were not planning a trip.
- Cyclists engaged in other related activities during the past three years such as: day road rides (87%), taking bikes on vacation (85%), independent bike touring (82%), casual riding in town (80%), and road racing (76%). Additionally, 46% of cyclists were spectators at a cycling-related event.
- Cyclists touring in Montana spend on average \$75.75/person/day and stay 8 nights or more in the state on average. Forty-one percent of those nights were spent in either hotels/motels or bed and breakfasts.
- Other activities participated in during their Montana multi-day cycling trip included visiting historical sites (40%), visiting Lewis & Clark sites (38%), wildlife watching (37%), day hiking (33%), and experiencing local breweries (29%).

Additionally, a 2013 study of users of the Illinois Prairie Path, a 61-mile multi-use trail connecting 18 communities in west suburban Chicago (Trails for Illinois, 2013) found:

- Nearly 66% of respondents traveled five miles or less to use the trail. Overall, survey respondents came from 100 different zip codes, including a handful from Michigan, Iowa, Minnesota, Wisconsin, Missouri, Colorado, Washington, Texas, and one from South Korea. (N=679)
- 54% of respondents identified as male, 46% as female. (N=657)
- 56% of respondents were over the age of 45 and 19% were younger than 35.
- 91% of respondents identified themselves as Caucasian, 2.4% Latino, 2% Asian, and 1% African American. (N=662)
- 30% of respondents who live outside the immediate area reported spending money during their trail visit on the day they were surveyed.
- The average amount spent by those reporting a purchase was \$41.50.
- Restaurants and bars (21%), grocery and convenience stores (10%) and vehicle expenses (8%) were the most common expenditures.
- For nearly 60% of respondents across all demographics, cycling was their primary activity on the trail. Walking, nature enjoyment running and socializing as additional reasons for using the trail.

Bicycle Events

A very visible form of bicycle tourism that draws visitors from out of town is a bicycle ride, event or festival. There are many examples of community or regional bicycle rides as well as professional events such as races or competitions. For example, the Register's Annual Great Bike Ride Across Iowa (RAGBRAI) is a one week ride across the state on routes that change annually. According to the RAGBRAI website, it is the oldest and longest bike riding tour in the world. Started in 1973, RAGBRAI attracts participants and spectators from around the world. In 1997, an estimated 20,000 riders participated. The popularity of the ride has forced RAGBRAI officials to limit the number of riders to 8,500 each year. These events attract not only riders but also their family and friends who usually explore the town while attending the event.

Bicycle Tours

Organized bike tours are another popular aspect of bike tourism globally. A number of tour companies specialize in arranging bicycle tours. These companies put together itineraries and routes that include interesting destinations and scenic rides. Bike tours establish routes and organized events, and they account for a large majority of the bike tourism industry (PedalMN, n.d.). Regional examples include the Family Fun Minnesota tour, a six-day group bike tour of Northern Minnesota.

Opportunities for Communities

Heidi Beierle (2011), a bike tourism expert from the University of Oregon provides the following ideas for making communities cyclist friendly:

- Use "Cyclists Welcome" or "Bikers Welcome" signage at community gateways and at key visitor services, such as restaurants or motels.
- Have public restrooms available or ensure that at least one business offers free water and restroom access.
- Provide inexpensive lodging options, such as camping or hostel, along with hotel accommodations.
- Keep key destinations open at convenient times. Bicycle tourists travel every day of the week and usually begin riding early in the morning.
- Ensure restaurants and lodging either have Wi-Fi or know where cyclists may access it. If the area has poor cell coverage, know the best locations to find a signal.
- Educate local residents to develop friendly rapport with visitors, particularly cyclists, within the community and on the road. Every cyclist is a potential customer, and local residents can have a significant effect on whether or not the cyclist spends money in a community.
- Provide visible bike parking outside of restaurants, coffee shops, and cafes and understand that cyclists may want to sit within the business where they can see their bikes.
- For lodging establishments, allow cyclists to bring bicycles inside their room. Provide rags for use on bikes or other dirty items. Let cyclists know what time services (such as food, laundry, or entertainment) close for the evening and open in the morning.



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