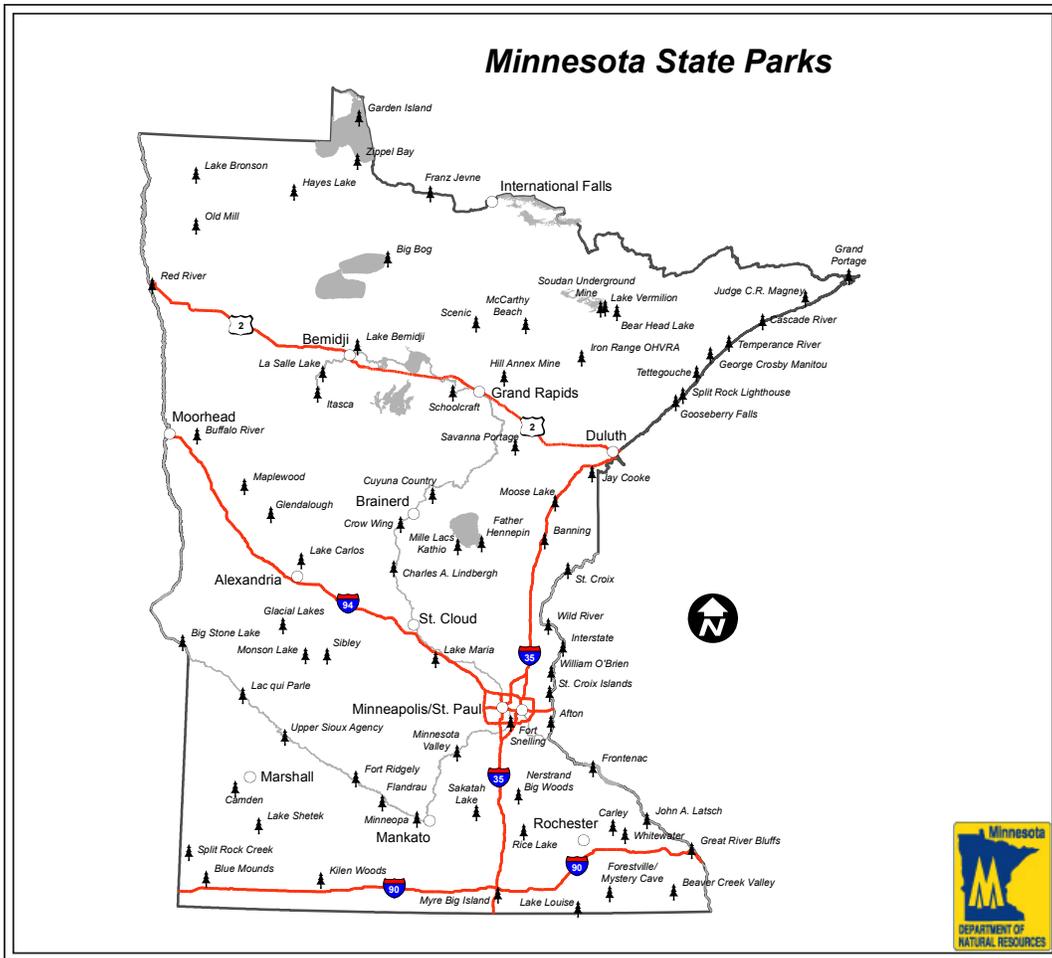


Results of 2012 Minnesota State Park Visitor Survey



Report prepared by:

Tim Kelly

Minnesota Department of Natural Resources
Operations Services Division

October 2013

ACKNOWLEDGMENTS

A number of Minnesota Department of Natural Resources staff contributed to the development and completion of this research. From the Division of Parks and Trails: Pat Arndt, Colin Kelly, Debbie Leider, Jade Templin, Jenny Wood, Laurie Young, and all the on-site park staff who initiated the survey process with park visitors; and from the Operations Services Division: Andrea Date and Tim Kelly.

CONTENTS

<u>Topic</u>	<u>Page</u>
Introduction	4
Methodology	5
Characteristics of Minnesotans visiting state parks	
Age and party composition	6
Race and ethnicity	9
Origin region	11
Educational attainment	12
Household income	12
Prior use of state parks	13
Wider outdoor recreation involvement of state park visitors	15
Characteristics of the state park trip	
Information sources	16
In-park activities	17
Origin region	18
Travel distance from home	18
Type of state park visitor	19
Accommodations for visitors on overnight trips	20
State park camper equipment	20
State park campers and electrical sites	20
Advance planning for park trip	22
Attraction to park of attending a park program	22
Satisfaction with the state park trip	
Overall trip satisfaction	24
Satisfaction with specific items that are important for an enjoyable park visit	26
Perceived value for state park fees paid	30
Changes visitors support/oppose in state park facilities, services, and programs .	31
References	36

INTRODUCTION

The 2012 state park visitor study is the latest in a series that date back to 1987. It furthers our understanding of park visitors: who they are and what they desire from the parks. Visitor studies reflect the belief that a successful park system depends on staying close to the visitor, on understanding how the visitor perceives the park experience and how that experience may be enhanced. They help to realize the vision of the Minnesota State Parks and Trails Division: “Our vision is to create unforgettable park, trail, and water recreation experiences that inspire people to pass along the love of the outdoors to current and future generations.”

The 2012 study included an update to park visitor trip spending, which was last done in 2001. Visitor spending is translated into economic activity (e.g., jobs and income) through an input-output model. The statewide and regional results of the economic analysis are reported in a separate document (Reference 1): *Contributions of Minnesota State Park Visitor Trip-Related Expenditures to State and Regional Economies in 2012*.

In this document are the results of the non-economic component of the 2012 research. Topics include visitor demographic characteristics, trip characteristics, in-park experience, and preferences for potential park management changes. When possible, 2012 information is presented in the context of previous studies, so trends become evident. Some types of information extend back 25 years to 1987.

Overall, the 2012 results largely confirm the patterns and trends found following the 2007 study, the most recent previous study (Reference 2). It is valuable to corroborate the previous findings, because it makes the patterns and trends more substantial, less contingent.

After a brief discussion of methodology, the results are presented as follows:

- Characteristics of Minnesotans visiting Minnesota State Parks

- Characteristics of the park trip

- Satisfaction with the park trip, including satisfaction with many aspects of the park experience that are important for an enjoyable outing

- Perceived value for park fees paid

- Changes visitors support/oppose in park facilities, services, and programs.

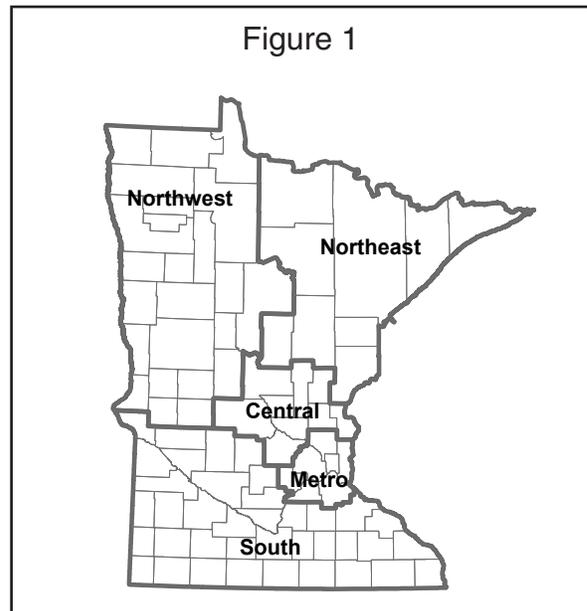
METHODOLOGY

The 2012 park visitor study collected information on visitor opinions, demographics, activities, trip characteristics, and trip spending. The study was conducted during the high use season (June to August). Most of the parks in the system participated in the study.

Based on a sampling schedule, park visitors were stopped as they exited the park and presented with a self-administered survey to fill out and mail back. Names and addresses were collected at the same time; reminders and an additional survey were sent to nonrespondents. Overall, 1372 surveys were distributed, and 986 ultimately returned, for a return rate of 72 percent. The return rate is sufficiently high (above 70 percent) to allay concerns about non-response bias.

Survey responses are weighted by park visitation (from fiscal year 2011) to make them more representative of the visitor population. Weighting is done by all combinations of the following: type of visitor (day user, overnight user), day of week (weekdays, weekend/holidays), and region of the park (5 regions on Figure 1).

Previous park visitor studies followed this same basic research methodology.



CHARACTERISTICS OF MINNESOTANS VISITING STATE PARKS

After some 50 years of growth following World War II, nature-based outdoor recreation turned a corner in the 1990s, and is now exhibiting declining participation on a per-capita basis. The decline is broad based and national in scope (Reference 3).

Efforts to maintain or grow participation levels in nature-based recreation — which includes natural-resource park use, fishing, hunting, boating, wildlife watching, and similar activities — face two major challenges in Minnesota and across the nation (Reference 3):

Generational challenge: young adults (under age 45) and their children are not as involved in these activities as in the past; when extrapolated this trend leads to further participation decreases in the near future.

Race/ethnicity challenge: nature-based activity participation is concentrated in the non-Hispanic white population, which is expected to grow very little (if at all) in the near future; when the primary participant base is stable to declining, participation is difficult to maintain or grow.

Minnesota State Park use faces both of these major challenges. Park use has shifted from younger to older age classes, and non-Hispanic whites are consistently over-represented in park visitation relative to population proportions. The non-Hispanic white population has largely quit growing in Minnesota, while the non-white and Hispanic populations — which are under-represented in park visitation relative to population proportions — make up the bulk of population growth. These findings, among others, are detailed below.

Age and party composition

State Park visitation from Minnesotans currently draws substantially from all age classes in the Minnesota population (Table 1—Reference 4). Visitation from young adults (19-34) is below population representation, and visitation from older adults (55-64) is above population representation. One big change is evident in Table 1: the portion of visitors age 55+ doubled from 15% in 2001 to 30% in 2012, while the portion of the general population in this age group went up a more moderate pace from 20% to 26% between 2001 and 2012.

Table 1

Age distribution of Minnesotans visiting MN State Parks

<u>Age class</u>	Park visitors, 2001* (percent)	Park visitors, 2007* (percent)	Park visitors, 2012* (percent)	MN population, 2011** (percent)
Children (<13)	25%	20%	19%	17%
Teens (13-18)	7%	9%	8%	8%
Adults (19-34)	16%	12%	14%	22%
Adults (35-44)	21%	17%	14%	13%
Adults (45-54)	17%	20%	16%	15%
Adults (55-64)	8%	15%	17%	12%
Adults (65+)	7%	7%	13%	13%
Total	100%	100%	100%	100%

* Party sizes of 10 or less.
 ** Source: U.S. Census Bureau.

The visitor population is aging faster than the general population (Table 2). Viewed in broad age classes, visitation has shifted out of the young adult and child/teen age classes (under 45 — mostly generation X and millennials) and into the older adult age classes (45+ — mostly baby boomers and older adults). This age shift is faster than the general population age shift overall (2001-12) and between each study (2001-07, and 2007-12). Consistent with this, the age of adult visitors (19+) continues to grow faster than the general population throughout the 2001-12 period.

Some of the summary trend statistics in Table 2 suggest that the pace of this age shift may be less in the 2007-12 period than the 2001-07 period: median age of overall visitor population, and more detailed age class changes for younger adults and children/teens. But — because other statistics in Table 2 are less clear on change in pace — any pace change cannot be firmly established.

At this time, it appears most defensible to conclude that the age shifts occurred over the full period from 2001 to 2012, and to conclude that any change in pace within the full period cannot be determined. In other words, when describing the age trend, focus on the far-right column in Table 2 “Change: 2012-01”.

Table 2

Age distribution of Minnesotans visiting Minnesota state parks in 2001, 2007,
and 2012

(restricted to party sizes of 10 or less, due to the statistical impact of a few very large
children's groups in 2001)

Note (12/14/12): MN population data reported under "2012" are for 2011.

Age class groupings	----- Visitation (percent) -----			Change: 2012-01
	2001	2007	2012	
Under 45	68%	58%	54%	-14%
45 and older	<u>32%</u>	<u>42%</u>	<u>46%</u>	<u>14%</u>
Total	100%	100%	100%	0%
MN POPULATION*				
	----- Population (%) -----			
Under 45	66%	62%	60%	-6%
45 and older	<u>34%</u>	<u>38%</u>	<u>40%</u>	<u>6%</u>
Total	100%	100%	100%	0%

Median age	2001	2007	2012	Change: 2012-01
All visitors	36.7	41.3	41.7	5.0
Adult visitors (19+)	43.9	48.2	51.3	7.4
MN population*	35.6	36.8	37.5	1.9

Age class	----- Visitation (percent) -----			Change: 2012-01
	2001	2007	2012	
Children (<13)	25%	20%	19%	-6%
Teens (13-18)	7%	9%	8%	1%
Adults (19-34)	16%	12%	14%	-2%
Adults (35-44)	21%	17%	14%	-7%
Adults (45-54)	17%	20%	16%	-1%
Adults (55-64)	8%	15%	17%	9%
Adults (65+)	<u>7%</u>	<u>7%</u>	<u>13%</u>	<u>6%</u>
Total	100%	100%	100%	0%

*Source: U.S. Census Bureau.

Party composition is another measure that can shed light on trends in the age structure of park visitation. In 2012, the portion of parties from Minnesota with children/teens is about the same or less than in previous years of 2001 and 2007 (Table 3). If children/teen parties had been a higher portion in 2012 than 2007, this would have added weight to the statistics that suggest the pace of age shift has slowed in the youngest age classes.

Table 3

Party composition of Minnesotans visiting MN State Parks

Party composition	Park visitors, 2001 (percent)	Park visitors, 2007 (percent)	Park visitors, 2012 (percent)
<i>Adult only parties:</i>			
1 adult, 0 teens/children	14%	11%	15%
2 adult, 0 teens/children	33%	35%	38%
3+ adult, 0 teens/children	<u>11%</u>	<u>11%</u>	<u>9%</u>
<i>Subtotal percent</i>	58%	56%	61%
<i>Parties with teens/children:</i>			
1 adult, 1+ teens/children	6%	9%	5%
2+ adult, 1+ teens/children	34%	34%	31%
0 adult, 1+ teens/children	<u>3%</u>	<u>1%</u>	<u>2%</u>
<i>Subtotal percent</i>	42%	44%	39%
Total percent	100%	100%	100%

Race and ethnicity

State Park visitation — like participation in nature-based recreation generally — is concentrated in the non-Hispanic white population, a pattern of participation that has been largely stable since 2001 (Table 4). While some 17% of the Minnesota population is currently non-white and/or Hispanic, only 3% of park visitors from Minnesota come from these populations. On a per-capita basis, the non-white and/or Hispanic populations (as a group) are under-represented in park visitation by a factor of almost 7.

The non-Hispanic white population — from which state parks draws most visitors — showed little growth over the last 10 years in Minnesota and nationwide (Table 5), a trend that is expected to continue, according to a recent population projections from the U.S. Census Bureau (Reference 5). These population trends, in conjunction with the visitation patterns by race and ethnicity, will increase the difficulty of maintaining and expanding visitation at state parks.

Table 4

Race and ethnicity distribution of Minnesotans visiting MN State Parks

	Park visitors, 2001* (percent)	Park visitors, 2007 (percent)	Park visitors, 2012 (percent)	MN population, 2011** (percent)
Race & Ethnicity				
White, Non-Hispanic/Latino	96.5%	97.2%	96.9%	82.8%
Non-white and/or Hispanic/Latino	<u>3.5%</u>	<u>2.8%</u>	<u>3.1%</u>	<u>17.2%</u>
Total	100.0%	100.0%	100.0%	100.0%
Race				
White	96.9%	97.7%	97.3%	86.9%
Non-white	<u>3.1%</u>	<u>2.3%</u>	<u>2.7%</u>	<u>13.1%</u>
Total	100.0%	100.0%	100.0%	100.0%
Ethnicity				
Non-Hispanic/Latino	99.5%	99.5%	99.6%	95.1%
Hispanic/Latino	<u>0.5%</u>	<u>0.5%</u>	<u>0.4%</u>	<u>4.9%</u>
Total	100.0%	100.0%	100.0%	100.0%

*Note: 2001 race calculations done without the "other" race class, which was not used in 2007 and 2012.

** Source: U.S. Census Bureau.

Table 5

Changing racial and ethniical composition of population in Minnesota and U.S., 2000 to 2010

(Source: U.S. Bureau of the Census)

Race & ethnicity	Population 2000	Population 2010	Numerical change	Percent change
Minnesota				
White, non-Hispanic	4,337,143	4,405,142	67,999	2%
Non-white and/or Hispanic	<u>582,336</u>	<u>898,783</u>	<u>316,447</u>	<u>54%</u>
Total	4,919,479	5,303,925	384,446	8%
U. S.				
White, non-Hispanic	194,552,774	196,817,552	2,264,778	1%
Non-white and/or Hispanic	<u>86,869,132</u>	<u>111,927,986</u>	<u>25,058,854</u>	<u>29%</u>
Total	281,421,906	308,745,538	27,323,632	10%

Origin region

State Park visitors from Minnesota come in large numbers from throughout the state (Table 6). Relative to population, the metro region is under-represented in park visitation (greater Minnesota over-represented), probably due to the fact that most state parks outside are located outside the metro region. These origin statistics have been largely stable since 2001.

Table 6

Origin region of Minnesotans visiting MN State Parks

<u>Region of origin</u>	Park visitors, 2001 (percent)	Park visitors, 2007 (percent)	Park visitors, 2012 (percent)	MN population, 2011* (percent)
Northwest	10%	13%	12%	9%
Northeast	9%	7%	10%	8%
South	29%	28%	27%	19%
Central	10%	8%	10%	11%
Metro	43%	45%	42%	54%
Total	100%	100%	100%	100%

* Source: U.S. Census Bureau.



Educational attainment

State Park visitors from Minnesota have far more formal education — especially in terms of four-year and post-graduate college degrees — than the general Minnesota population, a consistent finding since 2001 (Table 7). There has been little change in visitor diversity related to this measure.

Table 7

Educational attainment of Minnesotans (age 25+) visiting MN State Parks

<u>Educational attainment group</u>	<u>Park visitors, 2001 (percent)</u>	<u>Park visitors, 2007 (percent)</u>	<u>Park visitors, 2012 (percent)</u>	<u>MN population, 2011* (percent)</u>
High school graduate or higher	99%	99%	98%	92%
Bachelor's degree or higher	57%	59%	60%	32%
Post-graduate degrees	20%	22%	24%	11%

*Source: U.S. Census Bureau, 2011 American Community Survey 1-Year Estimates

Household income

State Park visitors from Minnesota have a higher median household income than the general Minnesota population (Table 8). Visitors tend to be more middle income than the general population; the highest and lowest income groups are under-represented in park visitation. The current income results are consistent with previous results.

Table 8

Household income of Minnesotans visiting MN State Parks

<u>Income class</u>	<u>Park visitors, 2012 (percent)</u>	<u>MN households, 2011* (percent)</u>
Less than \$20,000	4%	16%
\$20,000 to \$29,999	4%	10%
\$30,000 to \$39,999	9%	9%
\$40,000 to \$49,999	7%	9%
\$50,000 to \$59,999	10%	8%
\$60,000 to \$74,999	17%	11%
\$75,000 to \$99,999	24%	14%
\$100,000 to \$149,999	18%	14%
\$150,000 or more	<u>5%</u>	<u>9%</u>
Total	100%	100%
<i>Median</i>	<i>Between \$60,000 and \$74,999</i>	<i>Between \$50,000 and \$59,999</i>

*Source: U.S. Census Bureau, 2011 American Community Survey 1-Year Estimates

Prior use of state parks

State Park visitors from Minnesota are mainly repeat visitors to the park at which they were surveyed (Table 9, top box). Currently the portion of repeat visitors is 72%, somewhat higher than in 2007 (67%) and about the same as in 2001 (74%).

Visitors have been coming to Minnesota state parks on average for close to 30 years, and the history of visitation is longer in 2012 than 2007 (Table 9, bottom box), consistent with the aging of adult visitors (Table 2). Compared with 2007, there are the same portion of visitors who have been coming to parks for 1 and 10 years (with perhaps more visitors in between for 5 years), and fewer visitors for 20 and 30 years, which is due to the longer visitation history of 2012 visitors.

Table 9

Prior use of Minnesota State Parks

Have you ever visited this state park before? (responses of park visitors from Minnesota)			
<u>Response</u>	<u>Park visitors, 2001 (percent)</u>	<u>Park visitors, 2007 (percent)</u>	<u>Park visitors, 2012 (percent)</u>
Yes	74%	67%	72%
No	26%	32%	27%
Don't know	1%	1%	0%
Total	100%	100%	100%

For how many years have you been visiting Minnesota State Parks? (responses of park visitors from Minnesota)			
<u>Response measure</u>	<u>Park visitors, 2001</u>	<u>Park visitors, 2007</u>	<u>Park visitors, 2012</u>
Median years	(not asked in 2001)	23	28
Mean years	(not asked in 2001)	25	27
<hr/>			
<u>Cumulative percent in year range</u>	<u>Park visitors, 2001</u>	<u>Park visitors, 2007</u>	<u>Park visitors, 2012</u>
One year or less	(not asked in 2001)	5%	5%
Five years or less	(not asked in 2001)	14%	18%
Ten years or less	(not asked in 2001)	27%	28%
Twenty years or less	(not asked in 2001)	49%	42%
Thirty years or less	(not asked in 2001)	67%	62%

Wider outdoor recreation involvement of state park visitors

State Park visitors from Minnesota come from households that are more involved than the general Minnesota population in a wide range of outdoor recreation pursuits in Minnesota, as evidence by the household prevalence of fishing and hunting licences; and registrations of boats, ATVs, and snowmobiles (Table 10). This same conclusion was reached in 2007.

Table 10

Do you or a member of your household have this license or registration?
(responses of park visitors from Minnesota)

Type of license or registration	----- Percent of households with license or registration -----	
	Park visitor households*	All Minnesota households*
Current MN fishing license	48%	37%
Current MN hunting license	27%	22%
A boat currently registered in MN	41%	23%
An ATV currently registered in MN	16%	9%
A snowmobile currently registered in MN	11%	6%

* Sources: MN State Park Visitor Survey, 2012; and MN DNR, Licensing and Registration records for 2012.

CHARACTERISTICS OF THE STATE PARK TRIP

Information sources

Compared with 2007, websites (MN DNR and others) have grown as important sources of park information, while the remaining information sources have declined or stayed about the same (Table 11). In 2012, the MN DNR website is the leading information source for visitors, eclipsing word of mouth (“family and friends” which falls to second place) for the first time. Other leading information sources are the MN State Parks and Trail Guide, information at one or more MN State Parks, and the MN state highway map (the highway map dropped in importance quite a bit between 2007 and 2012).

Table 11

When you obtain information about Minnesota State Parks, what are your most important information sources?
(table values are the percent of visitors indicating an information source as important)

Category	Information source	2012 data			-- 2007 data --	-- Compare 2012 to 2007 --
		All users (percent)	Day users (percent)	Campers (percent)	All users (percent)	All users (2012 - 2007)
Minnesota DNR sources						
	The MN DNR website	64%	62%	78%	54%	10%
	Minnesota State Parks and Trails Guide	49%	49%	46%	47%	2%
	Information at one or more Minnesota State Parks	33%	33%	31%	36%	-4%
	Minnesota State Park & Trail Program and Special Events Catalog	9%	9%	8%	----	----
	The MN DNR telephone information center	5%	4%	9%	5%	0%
	PRIM recreation maps	3%	4%	3%	3%	0%
	MN DNR electronic information kiosk	2%	2%	2%	----	----
Explore Minnesota Tourism sources						
	Explore Minnesota Tourism website	27%	27%	23%	23%	3%
	Minnesota Explorer newspaper	16%	17%	13%	26%	-10%
	Highway information centers	11%	11%	8%	12%	-1%
	Explore Minnesota Tourism phone information center	2%	2%	3%	2%	0%
General sources						
	Family and friends	54%	55%	53%	56%	-2%
	Websites	40%	41%	33%	30%	10%
	Minnesota's State Highway Map	31%	31%	27%	40%	-10%
	Recreational opportunity maps and directories	15%	15%	12%	14%	1%
	Chambers of commerce/convention and visitors bureaus	12%	13%	8%	14%	-2%
	Other road maps	11%	12%	7%	13%	-2%
	Newspapers or magazines	10%	11%	5%	14%	-3%
	Places I stay (e.g., resorts, campgrounds)	10%	10%	10%	13%	-3%
	Travel guides/agents	8%	9%	3%	6%	1%
	TV or radio	7%	7%	6%	6%	1%
	Outdoor equipment stores	6%	7%	5%	6%	0%
	TV	6%	6%	4%	----	----
	Boating/camping/sports shows	5%	5%	4%	5%	-1%
	Facebook	4%	4%	5%	----	----
	Radio	3%	3%	3%	----	----
	Twitter	0%	0%	0%	----	----

Campers and day users share the same basic ranking of information-source importance. Older adults rely more on printed information sources (including the state road map) and less on websites, while younger adults are just the opposite. Facebook is indicated by 11 percent of millennials and 5 percent of generation Xers as

an important information source. Family and friends is indicated more frequently as an important information source by younger adults (millennials and generation Xers) than older adults.

In-park activities

Park activity participation in 2012 is largely the same as in 2007 and 2001. Hiking/walking is by far the leading activity (Table 12). Campers participate in more activities than day users (because they are in the park a longer time), and they are much more likely to engage in water activities (especially swimming and fishing) and biking.

Younger adults (and parties with teens-children) are more likely to swim and picnic, and less likely to bird watch than older adults (and parties with adults only).

Table 12

Which of the following activities did you participate in while visiting this park on this trip?

(table values are the percent of visitors indicating they participated in the activity)

Activity	----- 2012 data -----		
	All users (percent)	Day users (percent)	Campers (percent)
Hiking/walking	69%	67%	79%
Observing/photographing nature	33%	32%	40%
Sightseeing	32%	32%	34%
Looking at kiosks or visitor center exhibits	25%	24%	34%
Shopping in the park's nature store	23%	22%	29%
Taking a self-guided nature walk	23%	23%	28%
Picnicking	22%	21%	27%
Bird watching	21%	21%	20%
Swimming	19%	17%	35%
Visiting historic sites	18%	17%	24%
Did nothing/relaxed	16%	14%	27%
Fishing	14%	12%	29%
Bicycling	14%	12%	27%
Camping	14%	0%	100%
Geocaching	6%	6%	8%
Canoeing/kayaking	6%	4%	15%
Motorboating	4%	3%	8%
Taking a naturalist-led program	3%	2%	10%
Jogging/running	2%	1%	5%

Origin region

The origin of state park visitors has been relatively stable since 2001 (Table 13). Most are from Minnesota, with the metro region currently the origin of just over one-third (35%) of all visitors. (Note: This is the same as the preceding origin table, except this table contains out of state visitors.)

Origin of visitor	Visitors 2001 (percent)	Visitors 2007 (percent)	Visitors 2012 (percent)
Northwest MN	8%	11%	9%
Northeast MN	8%	6%	8%
South MN	24%	23%	22%
Central MN	8%	7%	8%
Metro MN	<u>36%</u>	<u>38%</u>	<u>35%</u>
<i>Minnesota subtotal</i>	<i>84%</i>	<i>84%</i>	<i>82%</i>
Outside of Minnesota	<u>16%</u>	<u>16%</u>	<u>18%</u>
Total percent	100%	100%	100%



Travel distance from home

State parks serve a large local market and a large long-distance (tourist) market (Table 14). One-third of all visitors are within 25 miles of home, while 43 percent are over 100 miles of home. Campers — not surprisingly — are more likely than day users to be tourists. The median travel distance of all visitors in 2012 is about the same as 2001, and less than 2007.

Table 14

Travel distance from home for Minnesota State Parks visitors

<u>Miles from home</u>	2012 visitors			-- 2007 visitors --	-- 2001 visitors --
	All visitors (percent)	Day users (percent)	Campers (percent)	All visitors (percent)	All visitors (percent)
25 or less	33%	37%	9%	27%	29%
26 to 50	11%	11%	15%	12%	13%
51 to 100	12%	11%	21%	15%	15%
101 to 200	20%	18%	31%	21%	18%
over 200	23%	23%	24%	25%	25%
Total percent	100%	100%	100%	100%	100%
<i>Median miles</i>	80	60	122	97	80

Type of state park visitor

Most park visitors are day users, and most of the day users are on trips from home (Table 15). The portion of day users from home has steadily increased since 2001. (Note: The portions of visitors who are campers and day users come from the visitation database; the portions of day users who are from home or on trips come from the visitor survey.)

Table 15

Type of State Park Visitor

<u>Type of visitor</u>	Visitors 2001 (percent)	Visitors 2007 (percent)	Visitors 2012 (percent)
Day user from home	49%	52%	55%
Day user on trip away from home	37%	35%	32%
<i>Day user subtotal</i>	86%	86%	87%
Camper	14%	14%	13%
Total percent	100%	100%	100%

Accommodations for visitors on overnight trips

Most park visitors on overnight trips away from home spend their nights outside the park (70%), with resorts, other campgrounds (not state park campgrounds), and cabins being the primary accommodations (Table 16). For the 30 percent of nights spent in the park, the large majority are spent in the park campground.

Table 16

Where are your nights spent on this overnight trip away
from home?
(for park visitors on overnight trips)

<u>Type of overnight accommodation</u>	<u>Percent of all nights</u>
Campground in this state park	28%
Indoor lodging in this state park	2%
<i>Subtotal: in this state park</i>	30%
Resort, motel or bed & breakfast inn	35%
Other campground (public or private)	13%
Friend's or relative's house or cabin	14%
My cabin	3%
Other accommodation	5%
<i>Subtotal: outside this state park</i>	70%
Total	100%

State park camper equipment

The equipment used by state park campers is mainly tents and vehicles, the latter of which is pop-up trailers or motorhomes/5th wheel/hard-side trailers (Table 17). The 2012 survey — compared with previous surveys — contained a large portion of visitors who stayed in camper cabins. If camper cabins are excluded, the portion of campers using tents and vehicles is about 50/50, and has been relatively stable since 2001. The type of camping vehicle is trending toward motorhomes/5th wheel/hard-side trailers and away from pop-up trailers.

State park campers and electrical sites

The large majority of state park campers (90% +) either get an electric site if they want one, or do *not* get an electric site if they do *not* want one (Table 18).

Table 17

State Park Camping Equipment

<u>Camping equipment</u>	Campers 2001 (percent)	Campers 2007 (percent)	Campers 2012 (percent)
Tent	49%	49%	44%
Pop-up trailer	18%	14%	13%
Motorhome, 5th wheel, or hard-sided trailer	29%	30%	34%
Stayed in camper cabin	2%	3%	7%
Other	<u>2%</u>	<u>4%</u>	<u>3%</u>
Total percent	100%	100%	100%

EXCLUDING CAMPER CABINS

<u>Camping equipment</u>	Campers 2001 (percent)	Campers 2007 (percent)	Campers 2012 (percent)
Tent	50%	50%	47%
Pop-up trailer	18%	14%	14%
Motorhome, 5th wheel, or hard-sided trailer	30%	31%	36%
Stayed in camper cabin (excluded)	----	----	----
Other	<u>2%</u>	<u>4%</u>	<u>3%</u>
Total percent	100%	100%	100%

Table 18

State Park Campers and Electrical Sites

<u>Want an electrical site?</u>	Campers 2012 (percent)	
Campers who wanted an electric campsite:	57%	
Got an electric site	51%	
Did not get an electric site	6%	
<i>Percent that got what they wanted</i>	90%	<i>(90% = 51% / 57%)</i>
Campers who did <u>not</u> want an electric site:	43%	
Got an electric site	2%	
Did not get an electric site	41%	
<i>Percent that got what they wanted</i>	95%	<i>(95% = 41% / 43%)</i>
Total	100%	

Advance planning for park trip

Just over one-third of visitors (35%) are spontaneous and decide to visit the park on the day of the outing (Table 19). Campers — not surprisingly — plan further in advance than day users; 35 percent of campers plan at least 3 months in advance.

Table 19

How many days (or months) in advance did you plan this trip to this park?

<u>Days/months in advance</u>	<u>All users (percent)</u>	<u>Day users (percent)</u>	<u>Campers (percent)</u>
None: decided trip on day of park visit	35%	40%	5%
1 to 7 days	26%	27%	21%
8 to 14 days	7%	6%	12%
15 to 30 days	6%	5%	8%
1 to 2 months	12%	11%	18%
3 to 5 months	7%	5%	15%
6 to 12 months	8%	6%	18%
Over 12 months	1%	1%	2%
Total	100%	100%	100%

Attraction to park of attending a park program

Attending a park program attracts a small portion of visitors, a portion that is less than 10 percent across type of visitor, party composition, and generation of respondent (Table 20).

Table 20

Did attending a park program (e.g., a staff-led program) attract you to the park on this visit?

<u>Visitor group</u>	<i>----- Response (percent) -----</i>			<u>Total</u>
	<u>Yes</u>	<u>No</u>	<u>Don't know</u>	
All visitors	7%	87%	6%	100%
<i>Type of visitor</i>				
Day users	7%	87%	6%	100%
Campers	6%	90%	4%	100%
<i>Party composition</i>				
Adult only party	6%	89%	5%	100%
Teens/children in party	8%	84%	8%	100%
<i>Generation of respondent</i>				
Millennial (31 or younger)	5%	87%	8%	100%
Generation X (32 to 47)	8%	86%	6%	100%
Baby boomers (48 to 66)	7%	90%	3%	100%
Pre-boomers (67 and older)	9%	78%	13%	100%

SATISFACTION WITH THE STATE PARK TRIP

Providing high-quality outdoor recreation experiences is a cornerstone of MN DNR efforts to retain and recruit recreation participants. High-quality experiences bring current participants back for more, and they help recruit new participants when current participants share their satisfying experiences through word of mouth, a trusted form of communication.

This basic marketing philosophy is well captured in the Minnesota State Parks and Trails vision: “Our vision is to create unforgettable park, trail, and water recreation experiences that inspire people to pass along the love of the outdoors to current and future generations.”

Overall trip satisfaction

Trip satisfaction is currently as high as it has been since measurements began 25 years ago (Figure 2). Over 80 percent of visitors (83%) give ratings in the excellent range: “completely satisfied” or have their “expectations exceeded”. For the remaining 17 percent, trip satisfaction could be improved, since it is in the “mostly satisfied”, “fair”, and “dissatisfied” range.

Trip satisfaction is little changed from 2007.

The perceived trend in park experience is positive. The majority of longer-term visitors (67%) believe the park experience has gotten better over time (Table 21). Few think it has gotten worse.

This perceived trend in park-experience quality appears to have improved somewhat since 2007, when it was asked for the first time.

Figure 2

Satisfaction with visit to a Minnesota state park

(based on visitor surveys from 1987 to 2012)

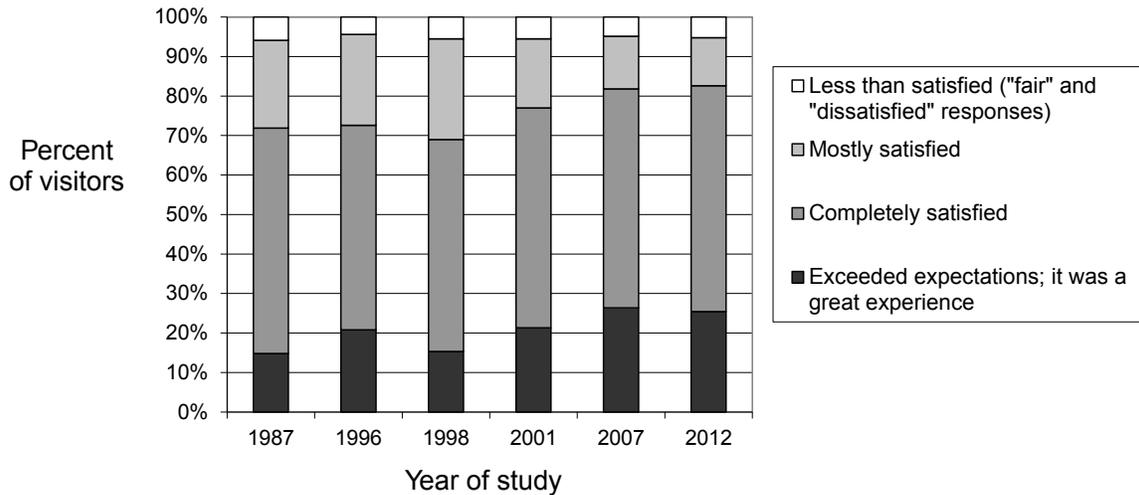


Table 21

Over the years you have visited the parks, has the quality of your park experience declined or improved?

(based on respondents who have been visiting Minnesota state parks for 10 or more years; about three-quarters of respondents have been visiting for 10+ years)

Response	Park visitors, 2007 (percent)	Park visitors, 2012 (percent)
Greatly improved	12%	19%
Improved	50%	48%
Stayed about the same	25%	24%
Declined	6%	3%
Greatly declined	0%	1%
Don't know	<u>5%</u>	<u>5%</u>
Total percent	100%	100%

Satisfaction with specific items that are important for an enjoyable park visit

In the visitor survey, each respondent is asked to rank the importance of 29 items that are potentially important to the enjoyment of the respondent's trip. After the importance rating, the respondent is asked to rate their satisfaction with the item in the park. The combination of importance and satisfaction ratings is an effective approach to understanding the visitor's perspective on what is working well for them in the park, and what could be improved to make their trip more enjoyable.

The 2012 importance-satisfaction findings have a great deal in common with 2007 and 2001 findings (Table 22). The correlation coefficient for the importance of items is 0.99 for 2012 compared with 2007, and 0.96 for 2012 compared with 2001 (correlations based on comparable items between studies). In short, the importance of items for an enjoyable park trip has been stable for the last 11 years.

Of highest importance for all visitors are natural landscape items (park beauty, natural setting, lakes/rivers in park), key staffing and maintenance items (cleanliness of grounds/facilities, and well protected natural resources, two items that may be conflated in visitors' minds), and trail-related items under recreation facilities and information/interpretation. The importance of trails is no doubt connected to the prevalence of hiking/walking as the primary activity that visitors engage in when experiencing the park. For campers, the quality of campgrounds and associated facilities are the most important.

Although there is a large amount of communality of item-importance rankings across party composition and age of visitor, there are some notable differences. Regarding party composition, parties containing teens/children (compared with adult-only parties) judge the importance of swimming areas much higher (45% "very important" responses for parties with teens/children compared with 24% for adult-only parties); and they rank other items as more important: accommodations for large family or social groups, sense of safety provided by presence of park staff, and quality of facilities in the picnic grounds. Younger visitors generally rank the importance of swimming areas much higher than older visitors.

Adult-only parties (and older visitors generally) see information items and staff assistance as more important. The more important information items are: visitor center exhibits, videos, and displays; general informational brochure/maps provided; and trail signs for finding my way around the park. The more important staff items

Table 22

How important is this item to making your park visit enjoyable?
&
How satisfied or dissatisfied are you with this item in the park?

(importance scale: 1=not important, 2=slightly important, 3=moderately important, 4=very important)

Item group	Specific item	Percent of importance responses "very important"		Satisfaction ratings for "very important" responses (percent)					Total Percent
		All users	Campers	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	
Natural landscape									
	Beauty of the park	81%		74%	24%	1%	2%	0%	100%
	A natural setting for the park	77%		80%	17%	2%	1%	0%	100%
	Lakes and rivers in the park	67%		73%	21%	3%	2%	1%	100%
Staffing and maintenance									
	Cleanliness of grounds and facilities	82%		69%	25%	4%	3%	0%	100%
	Well protected natural resources	72%		66%	30%	4%	0%	0%	100%
	Helpfulness of park staff	58%		74%	20%	2%	4%	0%	100%
	Lack of disturbances by other park visitors	55%		59%	30%	6%	3%	2%	100%
	Sense of safety provided by presence of park staff	52%		64%	26%	5%	4%	1%	100%
	Availability of park staff to answer questions	41%		71%	20%	5%	3%	1%	100%
	Attentiveness of park staff to my needs	36%		80%	13%	1%	4%	1%	100%
	Someone to greet me when I arrive at the park	29%		77%	18%	2%	2%	1%	100%
Recreation opportunities									
	Trails in the park	74%		63%	30%	4%	2%	0%	100%
	Quality of facilities in the picnic grounds	45%		62%	32%	4%	2%	0%	100%
	Designated places to swim	34%		62%	21%	9%	3%	5%	100%
	Boating opportunities (e.g., canoe/kayaking, motorboating)	25%		71%	23%	5%	1%	0%	100%
	Fishing opportunities	25%		76%	16%	6%	1%	1%	100%
Information and interpretation									
	Trail signs for finding my way around the park	71%		59%	29%	7%	4%	1%	100%
	General informational brochure/maps provided	52%		66%	28%	4%	2%	0%	100%
	Learning about the park using a self-guided trail, brochure, kiosk, or other self-guided means	30%		59%	32%	8%	1%	0%	100%
	Visitor center exhibits, videos, and displays	24%		69%	14%	9%	5%	3%	100%
	Learning about the park from a staff-led program	12%		62%	19%	13%	5%	0%	100%
Facilities and Services									
	Place or accommodations for pets in the park	28%		59%	25%	8%	7%	1%	100%
	Accommodations for large family or social groups	25%		78%	17%	3%	2%	0%	100%
	Availability of convenience items to purchase	16%		71%	16%	8%	2%	3%	100%
	Availability of souvenirs to purchase	13%		75%	9%	10%	2%	3%	100%
Camping (camper responses only)									
	Quality of the campground		83%	61%	32%	4%	2%	1%	100%
	Quality of facilities in campground		72%	56%	31%	6%	6%	1%	100%
	Secluded campsites		65%	52%	29%	13%	5%	1%	100%
	Campground near lake or river		57%	62%	26%	6%	4%	1%	100%

are: availability of park staff to answer questions, helpfulness of park staff, and attentiveness of park staff to my needs.

For the camping items, there is also a large amount of communality of item-importance rankings across party composition and age of visitor, with a few notable differences. Secluded campsites are more important to younger campers, and the quality of facilities in the campground is more important to parties containing teens/children.

After ranking the importance of an item for an enjoyable visit, visitors indicated how satisfied they are with the item in the park. Item satisfaction is evaluated if the visitor ranked the item as sufficiently important (“very important” in Table 22). Items of lesser importance are not evaluated in terms of satisfaction, because they were not as salient to the visitor’s enjoyment of the park.

Some items have high satisfaction ratings (when ranked as “very important”), and some are lower. The high-satisfaction items are the “keep up the good work” items, while the lower satisfaction items are candidates for efforts to raise performance. In this later category are any items with “very satisfied” ratings around 60% or below (in other words, some 40% or more of visitors who judge the item “very important” are less than “very satisfied” with it in the park). In the staffing and maintenance item group, this includes: lack of disturbance by other park visitors (Table 22). In the recreation opportunities item group, this includes: trails in the park, quality of facilities in the picnic grounds, and designated places to swim. In the information and interpretation item group this includes: trail signs, learning about the park through self-guided means, and learning about the park from a staff-led program. In the facilities and services item group this includes: place or accommodations for pets in the park. In the camping item group this includes all four items: quality of campground, quality of facilities in the campground, secluded campsites, and campground near lake or river.

None of the natural landscape items is of lower satisfaction.

As noted, the preceding lower satisfaction items are candidates for efforts to raise satisfaction. These items are identified on satisfaction ratings alone, without regard to how many visitors rank the item as of high importance (“very important” in Table 22). For some applications this is appropriate, since the items provided in the park should be seen by visitors as excellent. For instance, if you are concerned about the quality of learning opportunities in the parks for those visitors seeking such learning, then this satisfaction measure is appropriate.

Another measure from these same importance-satisfaction responses includes both the satisfaction ratings and how many visitors rank the item as of high importance. This measure is: portion of park visitors who are less than “very satisfied” with an item they rank as “very important” to their park enjoyment (Table 23). For example on Table 23, 29 percent of all park visitors rank trail signage as “very important” **and** are less than “very satisfied” with trail signage in the park (Table 22 has the data to compute this 29% figure in Table 23). This same percentage is derived

for various breakdowns of visitors by party composition, and age/generation.

When assessed this way (Table 23), five items consistently stand out in the visitor breakdowns. These five could receive additional attention under the rationale that item improvements would do the most good for the most visitors. Two items are trail related: trail signage, and the trails themselves. Two additional items may be connected in visitors' thinking: cleanliness of grounds and facilities, and well protected natural resources. And the last is: lack of disturbance by other park visitors.

All four of the camping items are consistently ranked by campers above the 20% threshold used to create Table 23.

Table 23

Percent of visitors who rank an item "very important" to park enjoyment **and** are less than "very satisfied" with the item in the park
(values only shown when percent is 20% or higher)

Responses of all visitors		<i>Party composition</i>		<i>Generation (age) of respondent</i>			
Specific item	All visitors	Adult only	Contains teens and/or children	Millennial (31 or younger)	Generation X (32 to 47)	Baby boomers (48 to 66)	Pre boomers (67+)
Trail signs for finding my way around the park	29%	31%	27%	34%	32%	27%	24%
Trails in the park	27%	28%	25%	27%	26%	31%	
Cleanliness of grounds and facilities	25%	20%	32%	22%	36%	20%	23%
Well protected natural resources	24%	25%	25%	29%	27%	25%	
Lack of disturbances by other park visitors	23%	22%	22%	25%	23%	23%	20%
Beauty of the park	21%		23%		29%		
Quality of facilities in the picnic grounds			22%	28%			
Sense of safety provided by presence of park staff			25%		23%		
Lakes and rivers in the park				23%	21%		
Designated places to swim					20%		
Helpfulness of park staff							27%
Place or accommodations for pets in the park							21%
Someone to greet me when I arrive at the park							
General informational brochure/maps provided							
Availability of park staff to answer questions							
A natural setting for the park							
Learning about the park from a staff-led program							
Learning about the park using a self-guided trail,							
Accommodations for large family or social groups							
Attentiveness of park staff to my needs							
Availability of convenience items to purchase							
Fishing opportunities							
Boating opportunities (e.g., canoe/kayaking,							
Visitor center exhibits, videos, and displays							
Availability of souvenirs to purchase							

Responses of campers		<i>Party composition</i>		<i>Generation (age) of respondent</i>			
Specific item	All campers	Adult only	Contains teens and/or children	Millennial (31 or younger)	Generation X (32 to 47)	Baby boomers (48 to 66)	Pre boomers (67+)
Quality of the campground	33%	27%	37%	36%	34%	32%	
Quality of facilities in campground	32%	24%	39%	22%	40%	29%	
Secluded campsites	31%	29%	34%	36%	36%	25%	
Campground near lake or river	21%	21%	20%	24%		21%	22%

PERCEIVED VALUE FOR STATE PARK FEES PAID

Visitors have been asked since 1996 about the value they receive for fees paid. In 2012, the results are within historical expectations: annual permit and camping are on the high side of those expectations, and daily permit is on the low side (Table 24).

Knowledge of perceived value for fees is an important consideration in user funding strategies. The higher the perceived value, the more willing visitors are to pay a higher fee. This connection between willingness to pay and perceived value is a consistent finding in user-funding studies, including a recent 2013 study (Reference 6).

Table 24

For the money paid for an entrance permit (or camping), do you feel you are getting a good, fair, or poor value from Minnesota State Parks?

Annual vehicle entrance permit

Perceived value	Year measured			
	1996	2001	2007	2012
Good	85%	82%	80%	86%
Fair	15%	17%	18%	13%
Poor	0%	1%	1%	1%
Don't Know	0%	1%	1%	0%
Total	100%	100%	100%	100%

Daily vehicle entrance permit

Perceived value	Year measured			
	1996	2001	2007	2012
Good	68%	72%	74%	68%
Fair	29%	25%	21%	26%
Poor	2%	2%	4%	4%
Don't know	0%	1%	1%	2%
Total	100%	100%	100%	100%

Camping

Perceived value	Year measured			
	1996	2001	2007	2012
Good	68%	74%	65%	75%
Fair	25%	23%	32%	23%
Poor	4%	3%	2%	2%
Don't know	3%	0%	1%	0%
Total	100%	100%	100%	100%

CHANGES VISITORS SUPPORT/OPOSE IN STATE PARK FACILITIES, SERVICES, AND PROGRAMS

Strong support is given in 2012 to several possible changes, including expanded hiking opportunities, more learning opportunities (self-guided and staff-led), and more programs for children (Table 25). “More hiking opportunities” is the most supported item (by far), which reiterates the high importance of trail-related concerns in the park. Also receiving strong support is more accommodations for people with mobility impairments, cell phone coverage near park visitor centers and campgrounds, not expanding the amount of park development to protect remaining resources, and more rustic camper cabins.

Possible changes that receive strong opposition are familiar from previous studies: elimination of park entrance fees, more hunting opportunities, and more OHV opportunities (Table 25).

Between the support and oppose extremes are possible changes to which visitors provide moderate support, are ambivalent about, and indicate the change may be controversial (sizable support and opposition to the possible change). Moderate support is indicated for expansions of the following: special events, geocaching opportunities, screened-in picnic shelters, mobile applications for park information, playgrounds, facilities for large groups, and mountain biking opportunities.

Possible changes that may be controversial (receive at least 20% support and opposition) include expansions of the following: paved trails, wireless internet access near park visitor centers and campgrounds, land developed for recreation use, disc golf, coffee shops/gathering places, and off-leash dog areas.

Visitors are largely ambivalent about two possible changes: webcam coverage of park features, and more horse trails.

There is broad agreement on the responses in Table 25 across type of user (day user, camper), party composition (adult only, teens/children in party), and generation/age of visitor. Notable difference that do exist are between young adults and older adults, with the young adults more supportive of mobile applications, disc golf, off-leash dog areas, and elimination of entrance fees.

Table 25

How much do you support or oppose each possible change being made for Minnesota State Parks?

(oppose/support scale: 1=strongly oppose, 2=mildly oppose, 3=neither oppose nor support, 4=mildly support, 5=strongly support)

Possible change	Average "oppose/support" response**	Oppose/support response						Total (percent)
		Strongly support (percent)	Mildly support (percent)	Neither oppose nor support (percent)	Mildly oppose (percent)	Strongly oppose (percent)	Don't know (percent)	
Changes visitors largely support (average greater than 3.5)								
● Provide more hiking opportunities.	4.17	37%	37%	20%	1%	0%	5%	100%
● Provide more self-guided learning opportunities and exhibits.	3.85	20%	41%	29%	1%	1%	8%	100%
● Provide more programs for children in the parks.	3.70	18%	32%	40%	1%	1%	8%	100%
● Provide more accommodations for people with mobility impairments.	3.66	18%	27%	40%	2%	2%	10%	100%
● Provide cell phone coverage near park visitor centers and campgrounds.	3.66	25%	35%	23%	5%	8%	4%	100%
● Do not expand the amount of development in state parks in order to protect remaining resources.	3.64	24%	22%	35%	5%	4%	9%	100%
● Provide more staff-led learning opportunities.	3.58	14%	31%	42%	3%	1%	10%	100%
● Provide additional rustic camper cabins.	3.56	18%	25%	38%	5%	3%	11%	100%
Changes visitors moderately support (average greater than 3.3)								
● Provide more special events in the parks.	3.46	11%	27%	47%	4%	2%	8%	100%
● Provide more opportunities to do geocaching in the parks.	3.41	11%	23%	51%	2%	2%	11%	100%
● Provide screened-in picnic shelters in the parks.	3.40	9%	35%	36%	6%	5%	8%	100%
● Provide state park information and applications customized for mobile devices (smart phones, tablet computers).	3.36	14%	24%	42%	5%	7%	7%	100%
● Provide playgrounds in the parks.	3.34	13%	27%	37%	10%	6%	7%	100%
● Provide more facilities for multi-family or group gatherings or camping.	3.32	9%	20%	53%	6%	1%	10%	100%
● Provide more opportunities to ride mountain bikes.	3.31	11%	26%	42%	7%	6%	8%	100%
Changes that receive sizable support and opposition from visitors (at least 20% support and opposition)								
● Provide more paved trails.	3.37	20%	23%	31%	14%	7%	5%	100%
● Provide wireless internet access near park visitor centers and campgrounds.	3.22	15%	28%	27%	11%	13%	7%	100%
● Develop more land in state parks for recreation use.	3.17	13%	24%	30%	17%	8%	9%	100%
● Provide disc golf courses in the parks.	2.92	7%	18%	39%	14%	13%	9%	100%
● Provide coffee shops/gathering places in the parks.	2.91	8%	21%	33%	16%	15%	7%	100%
● Provide off-leash dog areas in the parks.	2.75	9%	16%	31%	15%	21%	9%	100%
Changes visitors are ambivalent about (average between 2.7 and 3.3)								
● Provide webcam coverage of park scenery and natural events.	2.99	5%	19%	47%	8%	11%	9%	100%
● Provide more horse trails.	2.80	3%	6%	55%	13%	8%	15%	100%
Changes visitors largely oppose (average less than 2.5)								
● Eliminate park entrance fees (i.e., drop annual and daily entrance permits).	2.46	9%	10%	27%	17%	31%	5%	100%
● Provide more hunting opportunities.	2.42	5%	4%	37%	15%	25%	14%	100%
● Provide more opportunities to ride off-highway vehicles (e.g., ATVs).	2.12	5%	7%	21%	21%	39%	8%	100%

** Average value ignores "don't know" response

From 2007 to 2012, the possible changes visitors support/oppose in the parks has been largely stable. Correlation coefficients range from 0.93 to 0.96 when comparing mean support/oppose responses between 2007 and 2012 for different visitor groups (all visitors, all campers, tent campers, and vehicle campers) for the possible changes relevant to each group.

However, two of the possible changes have noticeable differences from 2007 to 2012. Support has increased, and opposition decreased for two technology items: providing internet access and cell phone coverage near park visitor centers and campgrounds. Between 2007 and 2012, support (“mild support” plus “strong support”) for wireless internet increased from 25 percent to 43 percent for all visitors, and support for cell phone coverage increased from 50 percent to 60 percent. Campers, too, responded with increase levels of support for these changes.

Certain of the possible changes are relevant to campers as a group, so their responses are examined separately (Table 26). Some these possible changes are largely supported by all campers, others largely opposed, the remaining have levels of support/opposition that differ by the type of camper (tent or vehicle camper).

All campers support two possible changes: more spacing between campsites, and cell phone coverage near park visitor centers and campgrounds. They all oppose one possible change: eliminating non-reservable campsites and making all sites reservable.

Possible changes tent campers support and vehicle campers are ambivalent about include: separate campgrounds for tent and vehicle campers, more walk-in/cart-in campsites, and more rustic camper cabins. The latter two are most applicable to tent campers.

A possible changes vehicle campers support and tent campers are ambivalent about is: more electrical hook-ups for campers. This is possible change most applicable to vehicle campers.

A possible changes vehicle campers support and tent campers indicate may be more controversial (have at least 20% support and oppose) is: wireless internet access near park visitor centers and campgrounds.

Lastly, a possible changes vehicle campers moderately support and tent campers oppose is: more campsites for motorhomes and similar large rigs. This is possible

Table 26

How much do you support or oppose each possible change being made for Minnesota State Parks?

(oppose/support scale: 1=strongly oppose, 2=mildly oppose, 3=neither oppose nor support, 4=mildly support, 5=strongly support)

Possible change	Average "oppose/support" response*	Oppose/support response						Total (percent)
		Strongly support (percent)	Mildly support (percent)	Neither oppose nor support (percent)	Mildly oppose (percent)	Strongly oppose (percent)	Don't know (percent)	
Changes all campers support								
• Provide more spacing between campsites.								
All campers	4.2	44%	32%	19%	2%	1%	3%	100%
Tent campers	4.3	49%	31%	16%	3%	0%	1%	100%
RV and trailer campers	4.1	42%	29%	21%	2%	1%	4%	100%
• Provide cell phone coverage near park visitor centers and campgrounds.								
All campers	3.8	32%	32%	22%	6%	7%	1%	100%
Tent campers	3.5	22%	32%	27%	10%	10%	0%	100%
RV and trailer campers	4.0	40%	32%	20%	2%	5%	1%	100%
Changes all campers oppose								
• Eliminate non-reservable campsites and make all sites reservable.								
All campers	2.3	8%	10%	22%	21%	38%	1%	100%
Tent campers	2.2	6%	7%	25%	23%	37%	1%	100%
RV and trailer campers	2.3	10%	13%	15%	20%	41%	1%	100%
Changes tent campers support and RV/trailer campers are ambivalent								
• Provide separate campgrounds for tent and vehicle campers.								
All campers	3.5	17%	23%	46%	7%	3%	3%	100%
Tent campers	3.8	29%	31%	33%	5%	1%	1%	100%
RV and trailer campers	3.1	8%	13%	57%	11%	5%	4%	100%
• Provide more walk-in/cart-in campsites.								
All campers	3.4	16%	16%	53%	4%	2%	9%	100%
Tent campers	3.7	26%	25%	40%	3%	2%	4%	100%
RV and trailer campers	3.1	6%	8%	64%	4%	2%	15%	100%
• Provide additional rustic camper cabins.								
All campers	3.5	14%	29%	46%	4%	2%	6%	100%
Tent campers	3.6	18%	30%	40%	4%	3%	4%	100%
RV and trailer campers	3.3	5%	26%	55%	5%	0%	8%	100%
Changes RV/trailer campers support and tent campers are ambivalent								
• Provide more electrical hook-ups for campers.								
All campers	3.5	24%	25%	34%	9%	6%	3%	100%
Tent campers	2.8	6%	12%	48%	17%	12%	4%	100%
RV and trailer campers	4.1	42%	34%	20%	2%	1%	1%	100%
Changes RV/trailer campers support and tent campers have sizable portions that support and oppose								
• Provide wireless internet access near park visitor centers and campgrounds.								
All campers	3.4	24%	26%	25%	10%	13%	1%	100%
Tent campers	3.0	15%	24%	24%	15%	20%	2%	100%
RV and trailer campers	3.7	32%	27%	25%	6%	8%	1%	100%
Changes RV/trailer campers moderately support and tent campers oppose								
• Provide more campsites for motorhomes and similar large rigs.								
All campers	2.9	11%	15%	39%	19%	14%	2%	100%
Tent campers	2.3	2%	5%	35%	29%	25%	3%	100%
RV and trailer campers	3.4	20%	23%	40%	10%	5%	1%	100%

* Average value ignores "don't know" response

change most applicable to vehicle campers.

There is broad agreement on the camper responses in Table 26 across party composition (adult only, teens/children in party), and generation/age of visitor. Notable difference that do exist are between young adults and older adults, with the young adults less supportive of more electric sites, and more campsites for motorhomes and similar large rigs. Young adults are more likely than older adults to be tent campers and, thus, to more strongly reflect some of the “tent camper” opinions.

The camper results in Table 26 are similar to those found in 2007.

REFERENCES

1. Minnesota Department of Natural Resources. 2013. Contributions of Minnesota State Park Visitor Trip-Related Expenditures to State and Regional Economies in 2012. Prepared by Tim Kelly, Operations Services Division.
2. Minnesota Department of Natural Resources. 2008. 2007 Minnesota State Parks Research Summary Report. Prepared by Tim Kelly, Operations Services Division. This research was a cooperative effort with the University of Minnesota.
3. Information on nature-based recreation trends by age class, and participation by race and ethnicity come from:

Minnesota fishing, hunting, park visitation, and non-motorized trail information is from:

Observations on Minnesota's changing resident angler and hunter populations using licensing information from 1969 to 2012. Prepared by Tim Kelly, Minnesota Department of Natural Resources, 2013.

2007 Minnesota State Parks Research Summary Report. Prepared by Tim Kelly, Minnesota Department of Natural Resources, 2008. This research was a cooperative effort with the University of Minnesota.

Status of Summer Trail Use (2007-09) on Five Paved State Bicycle Trails and Trends Since the 1990s. Prepared by Tim Kelly, Minnesota Department of Natural Resources, 2010.

Minnesota wildlife watching, and U.S. fishing, hunting and wildlife watching is from: U.S. Fish and Wildlife Service and U.S. Census Bureau. National Survey of Fishing, Hunting and Wildlife-Associated Recreation. Survey years 1991, 1996, 2001, 2006, and 2011.

Park and non-motorized trail participation in Twin Cities metropolitan regional system is from: Metropolitan Council Regional Parks and Trails Survey 2008. Prepared for Metropolitan Council by Information Specialists Group, Inc.

National park visitation: Gramann, Jim H., Steve Hollenhorst, Margaret Littlejohn, and Lena Le. 2006. Last child in the parks? Age trends in U.S. National Park visitation. Abstract of paper presented at 12th International Symposium on Society and Natural Resource Management.

4. All Minnesota and national population information comes from: U. S. Department of Commerce, Census Bureau.
5. U. S. Department of Commerce, Census Bureau. 2012 National Population Projections. NP2012_D1. Projected Population by Single Year of Age, Sex, Race, and Hispanic Origin for the United States: July 1, 2012 to July 1, 2060.
6. Minnesota Department of Natural Resources. Derived from data collected in 2013 state park and trail funding survey. Results not in report format. Data analysis by Tim Kelly, Operations Services Division.