

Murray County Lodging Study

An analysis of the accommodations market in Murray County, MN

By Ryan Pesch and Neil Linscheid

Sponsored by the Murray County Economic Development Authority

Presented in partnership with the EDA Center at the University of Minnesota Crookston

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July 2013

By Ryan Pesch and Neil Linscheid, Extension Educators, University of Minnesota

Report Reviewers:

Dan Erkkila, Tourism Specialist and Professor, University of Minnesota Tourism Center

Bill Ryan, Community Business Development Specialist, University of Wisconsin-Extension Center for Community and Economic Development

Partners/Sponsors:

Amy Rucker, Murray County Economic Development Authority

Nick Entinger, Division of Parks and Trails, Minnesota Department of Natural Resources

Report Editors:

Matt Kane, Program Leader, Community Economics, Extension Center for Community Vitality

Mary Vitcenda, Educational Materials Coordinator, Extension Center for Community Vitality

A special thanks to all state park visitors and Murray County residents who took the time to participate in the surveys.

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RESEARCH FINDINGS

The purpose of this University of Minnesota Extension study was to research the size and scope of the lodging market in Murray County. To do so, we surveyed a sample of visitors to the area and local residents, and we interviewed local businesses about their lodging needs. The study was conducted in late 2012 and early 2013.

Our investigation clearly finds that the market does not appear to be sufficient to support a new hotel. Two of the three market segments we investigated have minimal needs for overnight lodging – a focus since the rental of overnight lodging is the primary revenue source of a hotel or motel. Only 6 percent of state park visitors, or an estimated 86 parties, would have interest in overnight lodging. Instead, most visitors at the state park are only interested in camping locally, but notably, many are quite satisfied with their visit to the area.

Local businesses indicate a need for 15-20 rooms annually for their training and meeting purposes, and they estimate about 280 room nights from their clients and vendors, although these needs are currently being met through other lodging facilities in operation.

Local residents currently host a fairly large number of overnight guests and some suggest they would consider putting their guests up in overnight lodging if available facilities met their expectations. A low estimate would be around 1,000 room nights. An upper estimate would be 6,000 room nights, although put into the perspective of a 40-room hotel with nearly 15,000 room nights available, this traffic alone would not appear to support a new lodging facility of this scale.

Community leaders and local entrepreneurs may want to investigate lodging formats or scale of development other than a traditional 40+ room chain hotel to meet local lodging needs. This may take the form of collaboratively marketing a set of local homes or apartments that may be put out for rent online or assisting local entrepreneurs to develop small-scale inn or bed-and-breakfast establishments.

Research of both the local resident and local business markets would suggest some demand for local meeting and banquet space, which deserves some further investigation. Residents will host up to 1,000 events (a high estimate) in the next five years in Murray County and a number of open comments indicate challenges finding suitable event space in the county.

Since revenue from rental space in lodging is such a small percentage of average total revenue, this does not have a significant impact on the ability of residents to support a new lodging facility. To investigate, community leaders and potential entrepreneurs would need to first catalog existing meeting and banquet space and quality to identify a supply gap. The resident survey only estimated demand for future events.

BACKGROUND AND METHODOLOGY

The Murray County EDA contracted with University of Minnesota Extension to conduct a market analysis in order to identify opportunities for local lodging start-ups or expansions in the county. Murray County is a rural area located in the central part of Southwest Minnesota, including the communities of Slayton and Fulda (Figure 1). The market analysis examined both the existing tourist base attracted to nearby Lake Shetek State Park and the demand for lodging facilities from residents of the county. Extension used a number of methods to

Southwest Minnesota and Location of Murray County (outlined in pink)



conduct the market analysis, including (1) surveying a sample of Lake Shetek State Park visitors, (2) surveying a sample of Murray County residents, (3) mapping zip code data from overnight guests at Lake Shetek State Park, and (4) interviewing local businesses about their lodging needs.

Survey results assess the demand for lodging facilities in the Lake Shetek area, such as overnight lodging needs, as well as meeting and banquet space. The written surveys also asked Murray County residents and Lake Shetek visitors about their hotel preferences, such as price, amenities, and preferred hotel chain. If the EDA or a local entrepreneur chooses to pursue lodging development or a lodging feasibility study, these visitor and local resident preferences will help identify the appropriate product mix.

Results from the study are available to local decision makers, residents, and other interested parties. This information can assist either public or private enterprises to identify lodging opportunities and provide a data base from which to conduct a feasibility analysis. This study is not a feasibility study of a single property development. The authors intend for any and all parties interested in the health of the lodging industry in Murray County to use these results.

SURVEY OF VISITORS TO LAKE SHETEK STATE PARK

Extension surveyed overnight guests who stayed at Lake Shetek State Park in 2012 by mail. We used a modified Dillman method, mailing postcards soliciting guests'

participation, followed by a cover letter with the survey instrument and \$5 in chamber bucks as incentive (see Appendix 2), plus a postcard reminder. Extension mailed a survey to 250 households, and 166 households responded for a 66 percent response rate.

Visitors to Lake Shetek State Park

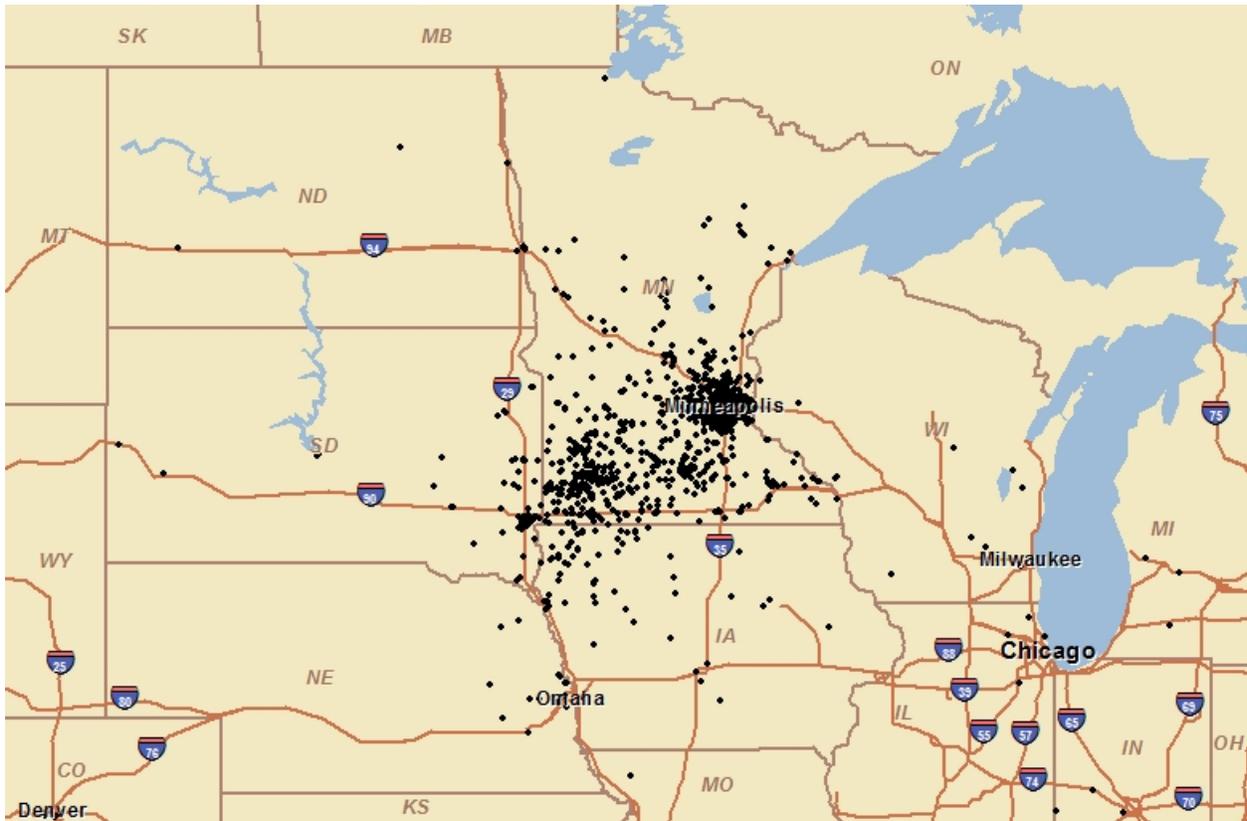
The Minnesota Department of Natural Resources provided records to Extension of overnight guests at Lake Shetek State Park, which gave us a good profile of overnight visitors to the area. A total of 1,435 households stayed overnight at Lake Shetek in 2012, accounting for 3,099 nights and an average of 2.2 nights per stay. These households primarily used camping facilities at Lake Shetek, although the park also has a small number of camper cabins available.

Extension used 1,435 visitor records from Lake Shetek State Park to profile visitors to the area. Each record included the zip code of a customer. Extension mapped the locations of all visitor records through a process called geocoding in Geographic Information Systems (GIS).

Although a simple mapping of the home locations of customers would indicate that customers come from far and wide, in truth, visitors to Murray County are highly concentrated in Minnesota. More than 80 percent of visitors are from Minnesota (85 percent) and nearly one third are from the Minneapolis-St. Paul (MSP) metropolitan area (see Appendix 4 for details).

It would be incorrect to perceive the bulk of overnight visitors as coming from long distances. A large cluster of overnight visitors live in Southwest Minnesota or nearby communities in South Dakota (7.4%) and Iowa (4.9%). A Marshall zip code tops the list, followed by Worthington and Pipestone (see Appendix 4 for details).

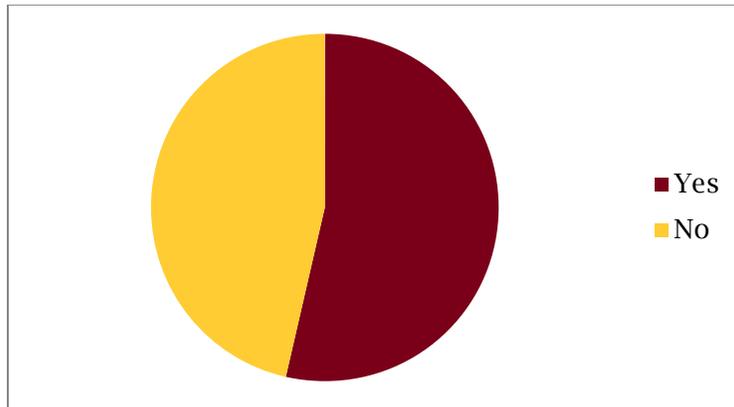
Figure 1: Location of overnight guests at Lake Shetek State Park



Respondents

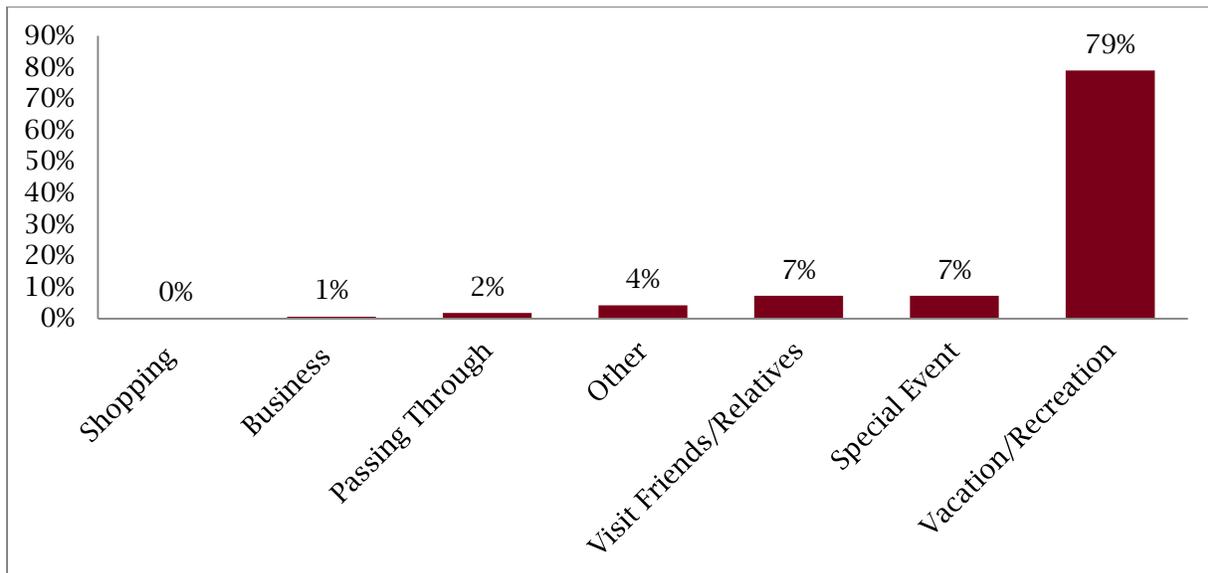
A majority of overnight guests at Lake Shetek State Park (53%) were visiting the area for the first time in 2012. Assuming our sample represents all 2012 visitors to Lake Shetek State Park, the park attracted 770 households to the area who had not visited before. Still, those who have visited the area before do so fairly frequently, between five and six times per year on average.

Figure 2: Was this your first time to the Lake Shetek area (N=166)?



The primary motivation for respondents to stay overnight at Lake Shetek was clearly vacation or recreation, accounting for nearly 80 percent of responses (see Figure 3). A few events that drew visitors included “family reunion” (4), “Wilder pageant” (4), “wedding” (3), and the “Slayton all-class reunion” (1). Others included “camping” (6), and a “3-day bicycle vacation” (1).

Figure 3: What was the primary reason for your overnight stay at Lake Shetek State Park? (n=166)



SURVEY OF MURRAY COUNTY RESIDENTS

Extension surveyed a sample of Murray County residents by mail. We used a modified Dillman method, mailing postcards soliciting their participation, followed by a cover letter with the survey instrument and \$5 in chamber bucks as incentive (see Appendix 3), plus a postcard reminder. Extension mailed a survey to 250 households, and 153 households responded for a 66 percent response rate.

Respondents

Resident respondents differed from visitors in age and income. Resident respondents were older and had less income overall than visitors. Forty-five percent of resident respondents were over age 65 in comparison to 15 percent of visitor respondents. Twenty-four percent of visitor respondents reported a household income below \$50,000 in comparison to 47 percent of resident respondents.

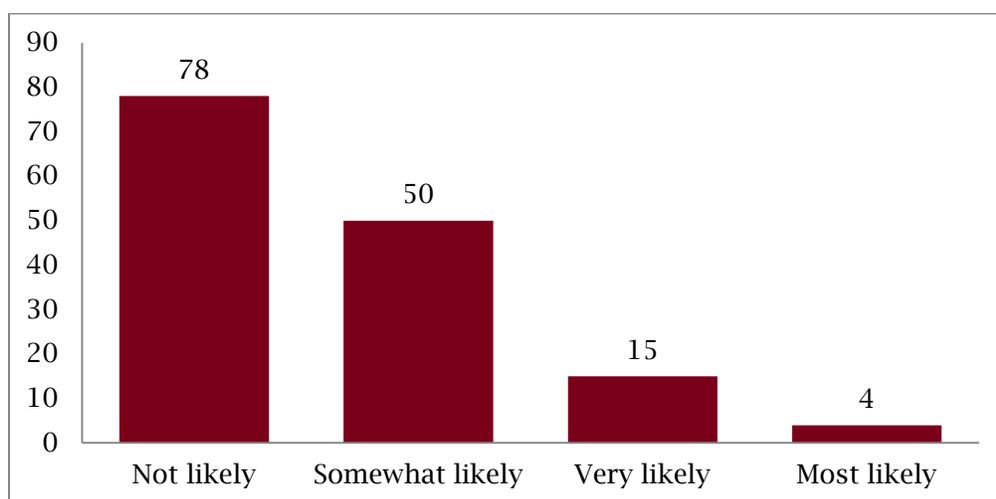
These demographic differences may explain some differences we observe in lodging preferences, assuming, as we do, that the differences are not due to sampling error. The gender of survey respondents did not vary significantly between residents and visitors. Males and females were nearly equal in both cases. Please see Appendix 1 for details about the demographics of respondents.

HOTEL DEMAND

Each survey asked questions to measure demand for lodging. We asked Lake Shetek overnight guests about how likely they would stay in a hotel or motel when visiting the area. We asked residents about how likely it was that their overnight guests would stay in a hotel on a visit to the area, as well as their own household's needs for nearby lodging and meeting or banquet space.

Resident respondents hosted overnights guests an average of six times a year, for 13.5 nights per resident household. Those who responded to the survey hosted overnight guests a total 2,060 times in 2012; however, few of those respondents expected that their guests would have used lodging locally if available (see Figure 4).

Figure 4: Likelihood that overnight guests of residents would have used local lodging (n=147)



Still, respondents who thought it would have been very likely or most likely hosted a total 225 guest nights. Assuming these respondents are representative of the households in the whole county, we would estimate about 500 households in the county host overnight guests who would use local lodging facilities if those facilities

met their guests' expectations. In estimating the number of room nights these guests would require, we used a high and low range.

On the low end, we can approach estimates in two ways. First, assuming that only the three percent of Murray County households who are “most likely” to arrange for their guests actually use local lodging, guests would require 1,100 room nights (see Table 1). Second, assuming that 500 Murray County households hosting overnight guests who are “very likely” or “most likely” to use local lodging actually host only one party for two nights, guests would require 1,000 room nights.

On the high end, we can assume Murray County residents are like the survey respondents, with all 500 households in the “very likely” and “most likely” categories arranging for lodging at the same rate as survey respondents said they would. At an average of 12 and 10.5 nights hosted for “very likely” and “most likely” households respectively, nearly 6,000 room nights could be realized from overnight guests who currently stay at private homes in the county (see Table 1).

This may seem to be a large number of room nights, but at best, it is a measure of market potential only if all those guests were captured by a single lodging establishment. In reality, existing lodging facilities already in operation within and outside of Murray County compete for overnight guests.

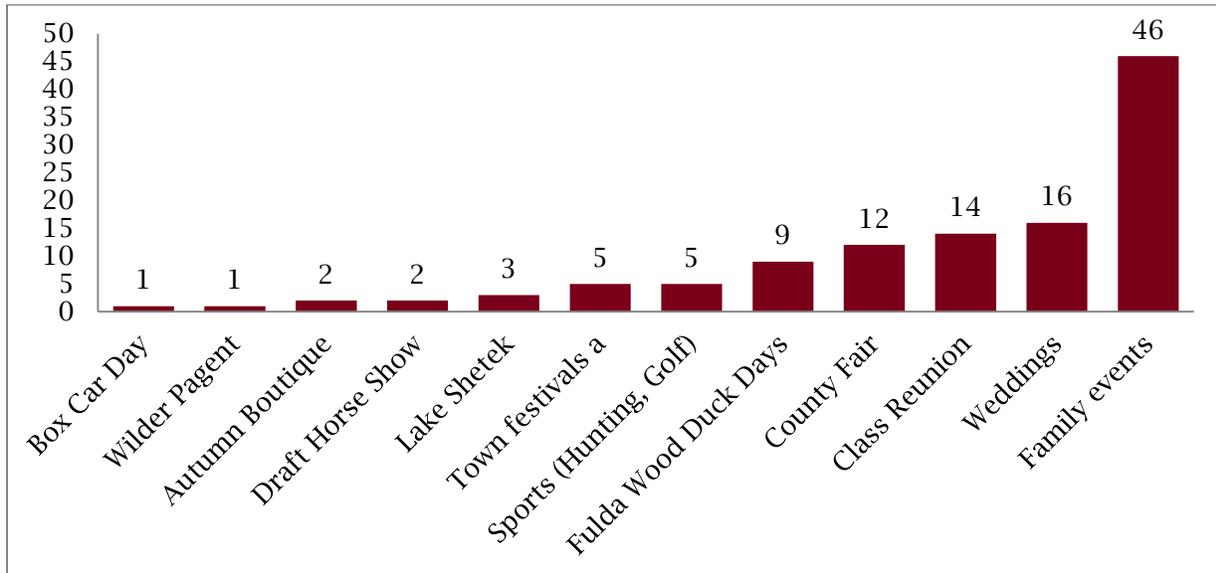
What’s more, residents host multiple overnight parties throughout the year, and these estimates assume all guests would be very or most likely to use lodging, when in fact some guests may stay in the residents’ homes and others would use lodging. For example, one party may be a son or daughter who one would expect to stay at home, whereas another party, such as a college roommate or cousin, may be more likely to use lodging; the survey did not allow for residents to indicate parties by likelihood to use lodging.

Table 1: Estimates of overnight guests at private homes in Murray County

	<i>Respondents by category</i>	<i>Est. HH in County in Category</i>	<i>Average nights/HH</i>	<i>Est. Room Nights</i>
Not likely	53%	2077	11.6	24,176
Somewhat likely	34%	1331	17.1	22,818
Very likely	10%	399	12.2	4,873
Most likely	3%	107	10.5	1,118
Total	100%	3914		

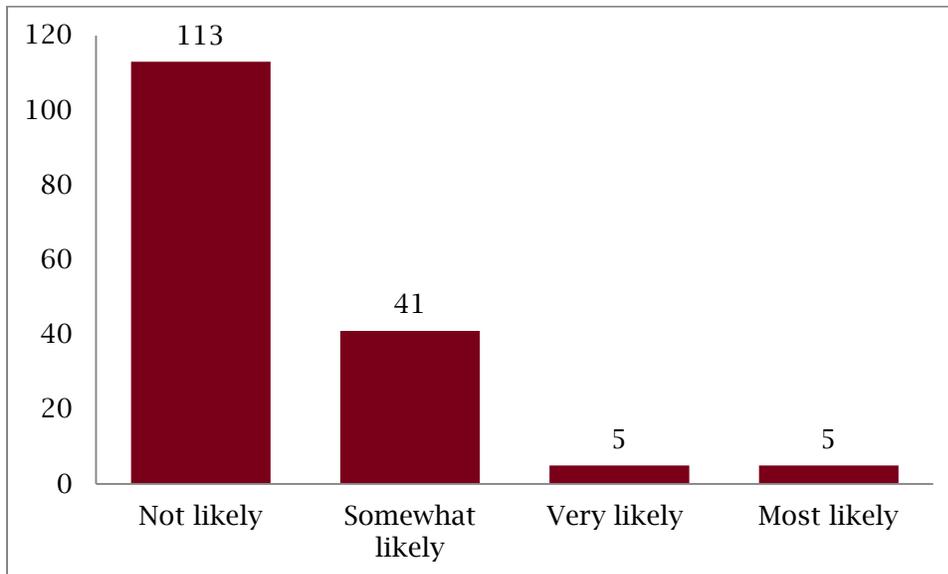
Resident respondents reported events that bring overnight guests to their homes. Family events and gatherings, such as holidays and birthdays as well as weddings, top the charts, although community festivals do appear - including the county fair and Fulda Wood Duck Days. Community festivals were mentioned 32 times out of a total of 116 mentions by 74 respondents.

Figure 5: Events that brought overnight guests to homes of residents (n=74)



We asked Lake Shetek State Park overnight guests if they would use local lodging on a visit to the Lake Shetek area if it met their expectations. Few indicated (6%) that they would be likely to do so (see Figure 6).

Figure 6: Likelihood that Lake Shetek guests would use local lodging (n=164)

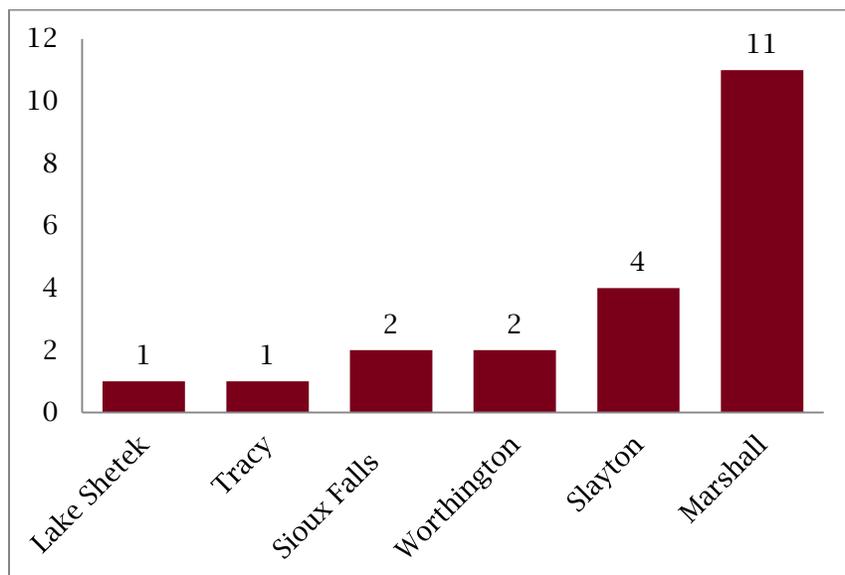


Regarding the Lake Shetek State Park visitors and assuming respondents were like other state park visitors, we estimate 86 parties would be likely to stay at local lodging (6% of 1,435 overnight guest records), although we cannot estimate room nights since the survey did not ask about their length of stay in the Lake Shetek Area.

Event lodging rental

The survey also asked residents about whether they rent lodging in nearby communities for special events, such as birthday parties or pool parties. Few respondents (19) indicated that they do so. A majority arrange lodging in Marshall (see Figure 7).

Figure 7: Communities where residents arrange lodging for special events (n=19)



When asked whether they would consider renting lodging in Murray County if the lodging met their expectations, only nine of the 19 indicated they would very likely or most likely do so. It should be noted that four of the 19 already rent space for such events in Slayton.

Meeting and banquet space

The resident survey also explored the demand for meeting or banquet space in Murray County. The rental of space for social functions or business meetings is often part of a lodging establishment's product mix, but for those establishments that rent space, such receipts only account for 5 percent of total sales (Economic Census, 2007).

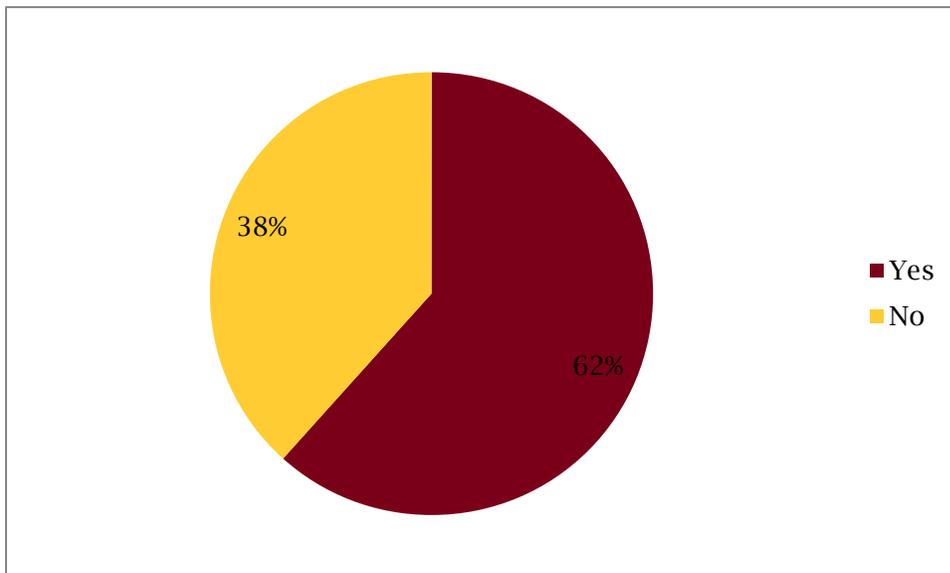
Figure 8: Number of future events resident will host in next five years (n=38)



Assuming survey respondents are representative of all Murray County households, we estimate residents will host upwards of 1,000 events in the next five years. This estimate is certainly an upper limit since survey respondents may be counting the same events; for example, two respondents counting the same banquet for the same organization or two respondents counting the same wedding.

The survey asked residents if they would consider hosting their event at a hotel in Murray County, and a good majority indicated they would (see Figure 9).

Figure 9: Percentage of resident respondents who would host their event at a hotel if available (n=133)

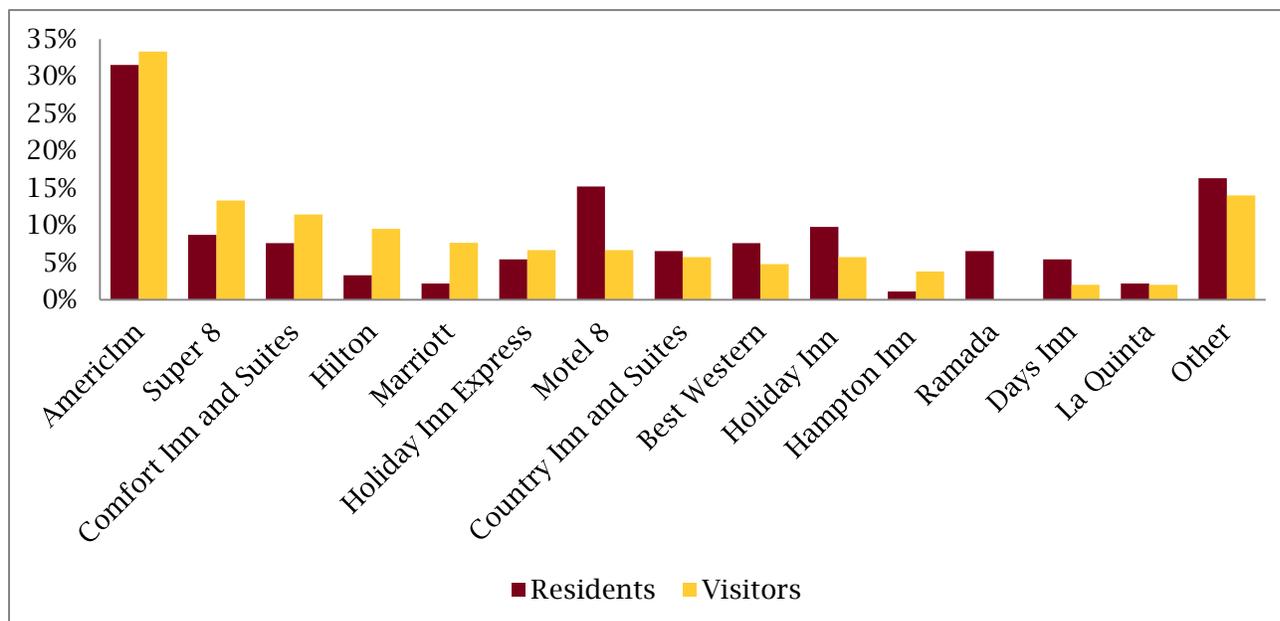


Regardless of findings, meeting space and banquet rental is a small part of most lodging establishments' sales (Economic Census, 2007).

HOTEL PREFERENCES

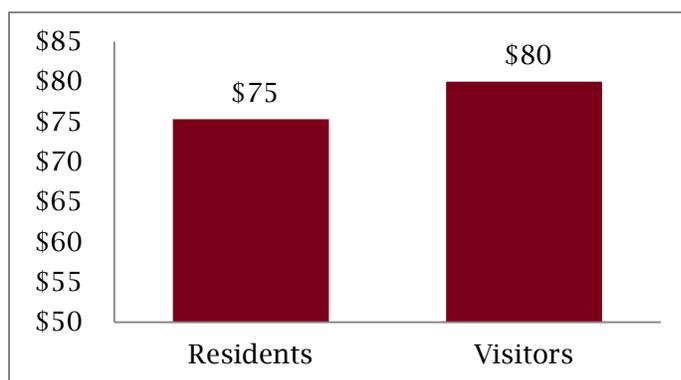
Surveys to both Lake Shetek visitors and residents asked questions about lodging preferences, such as price, amenities, and lodging brands.

Figure 10: Number of times hotel or motel brand mentioned (Residents, n=92, Visitors, n=105)



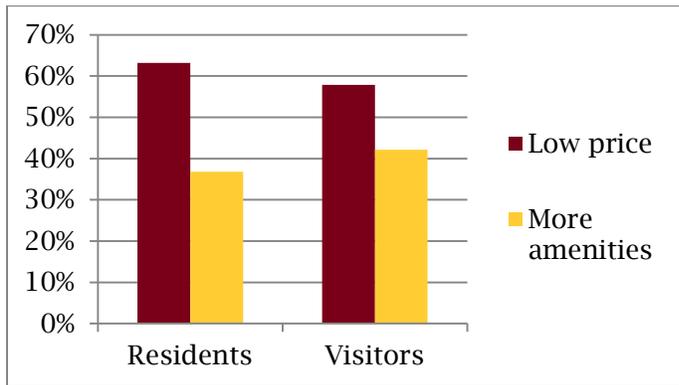
We found little difference between what residents and visitors deemed a “fair price” for a hotel stay.

Figure 11: Average "fair" price for hotel stay (Residents, n=126; Visitors, n=147)



A greater proportion of residents prefer low price over more amenities than visitors. This is a discrepancy that might be explained by the household income and age differences between visitors and residents (see *Demographics of Survey Respondents* in Appendix 1), with residents perhaps more likely to be price sensitive.

Figure 12: Preference of visitors and residents if given choice between price and amenities (Residents, n=133, Visitors, n=152)



A few factors clearly top the list of both residents and visitors in importance: cleanliness, followed by price and swimming pool availability.

Figure 13: Top feature of lodging stay (Residents, n=108, Visitors, n=162)

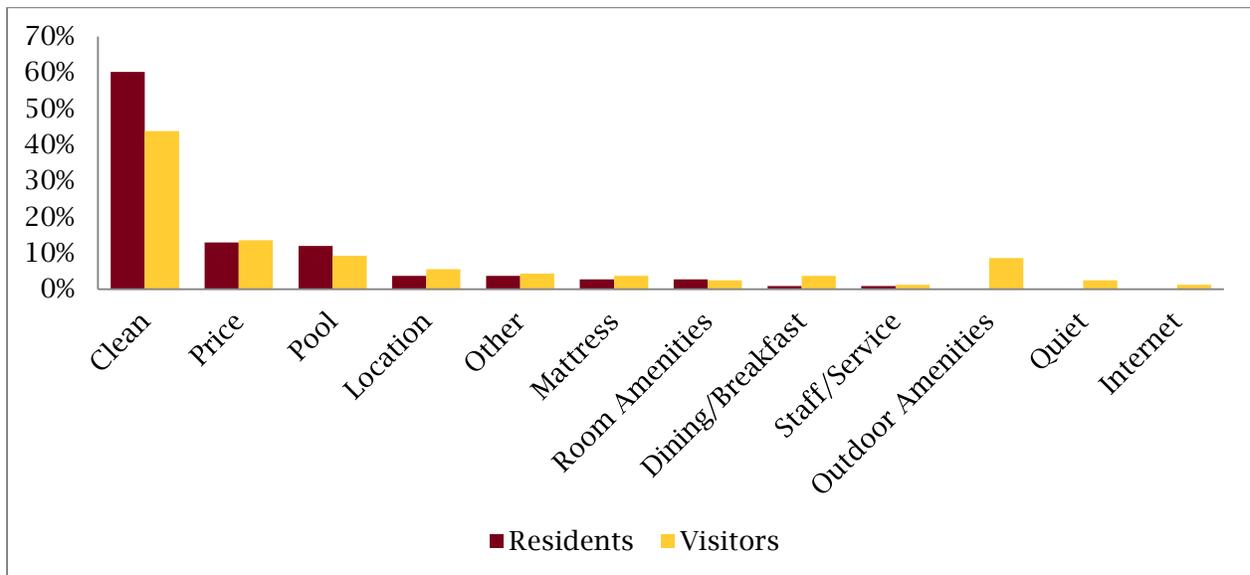
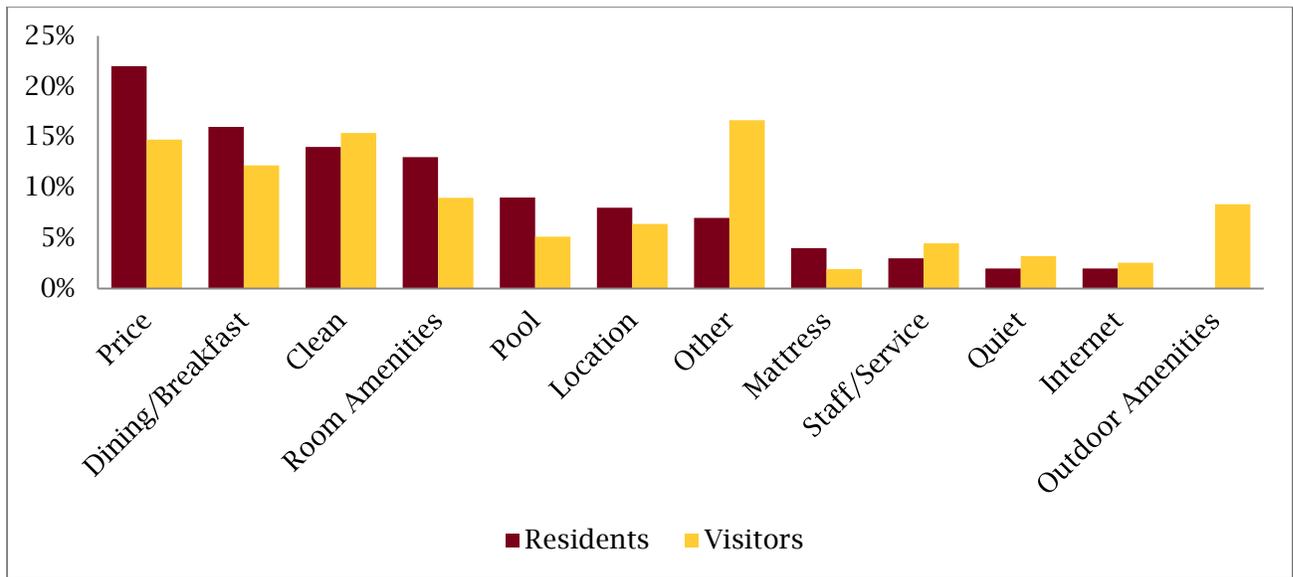


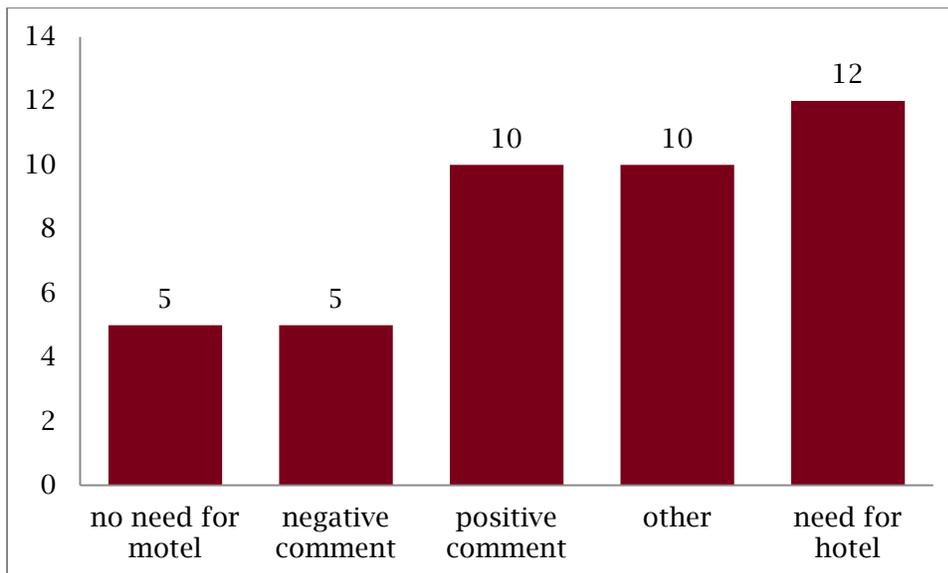
Figure 14: Second most important feature of lodging stay (Residents, n=100, Visitors, n=156)



ADDITIONAL COMMENTS FROM RESIDENT SURVEY

Lastly, the survey asked operators to provide any additional comments about lodging in Murray County. Resident respondents were mainly supportive of new lodging, although a few held contrary views. We coded comments according to major themes.

Figure 15: Additional comments from resident survey by theme (n=42)



Following is a sampling of resident comments by theme (see Appendix 5 for all comments):

Need for a hotel

- Fulda has many wedding receptions at the community building and overnight guests are forced to go to Worthington.
- Yes, there is a need for more lodging in the area. My daughters had a difficult time planning their weddings because of nowhere for guests to stay. Nowadays everyone expects a pool.

Positive

- Although I probably wouldn't use one much, I do think it would be nice to have a hotel.
- It would be a very valuable asset to the community!

Other

- Fulda needs senior apartments with garages that have no outside upkeep for the residents.

Negative

- Murray County is a big county. No matter where a motel was built, half of the county would be closer to existing motels in Pipestone, Marshall, or Worthington.
- I'm sorry; to waste tax payer funds would be very foolish in this economy! There is little or no need in Slayton for a hotel; there's nothing to draw people other than the horse show one week a year.

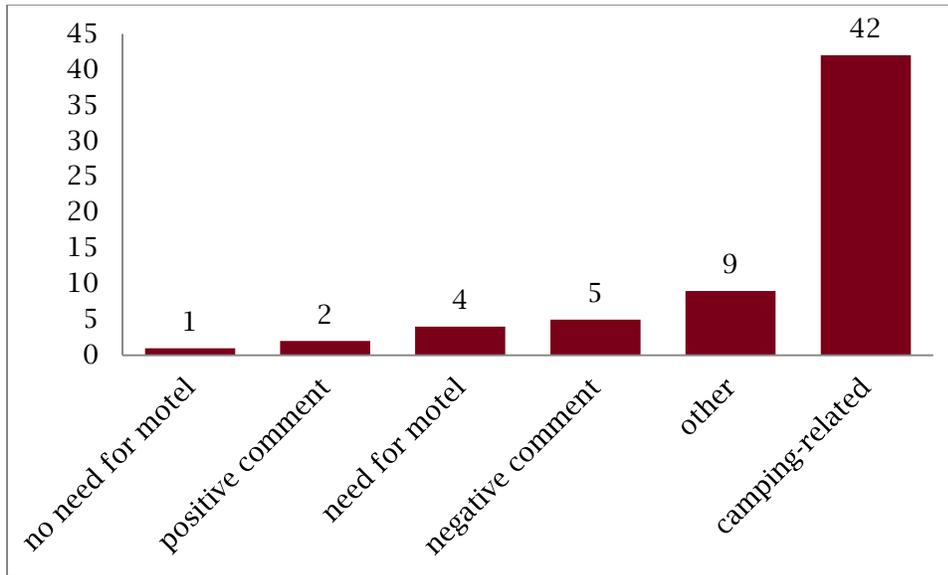
No need for a hotel

- Murray County needs more industry not motels. We need more jobs.
- With Marshall and Worthington so close, they are convenient to get to for the pool access. If you're looking for rest, the Hill Top Inn is a nice place to kick your feet up!

ADDITIONAL COMMENTS FROM VISITOR SURVEY

Many visitors did not express interest in hotel lodging and many gave additional comments about camping or suggestions for improving the camping experience in the area. Of those who addressed hotel lodging directly, a number suggested a lodge format on the lake would be preferable to any standard motel chain. Many of those surveyed had a great experience at Lake Shetek State Park, and their satisfaction in the area as new visitors should be a focus of any follow up activities to this survey.

Figure 16: Additional comments from visitor survey by theme (n=63)



A sampling of visitor comments by theme (see Appendix 5 for all comments):

Camping-related comments

- We would camp at the state park again and not stay in a hotel. We enjoy camping and it's a great park!
- We live in our RV full time, which is why we don't stay in hotels. We were very pleased with the state park!
- The lake is a beautiful asset. We really enjoyed our stay and advertised it to other campers.

Other

- The cabins at Lake Shetek were beautiful. More cabin-style lodging with additional amenities (bathroom, running water) that blend into the surroundings of Lake Shetek would be a nice addition.
- It's important that each community have a website that lists local lodging and camping.

Negative

- Unless the lodging was on the lake I don't think people would utilize it as there is nothing to do in the area.
- The potential for development of the Lake Shetek area has been maximized. Focus on the quality of what currently exists rather than adding quantity. It is a small lake area in danger of over-development.

Need for a hotel

- We live nearby and for family events such as weddings there are not many places to choose from.
- I would be interested in hotel lodging if it were like a lodge – not the same old hotel you can get anywhere.

INTERVIEWS OF LOCAL BUSINESSES

We wanted to understand business traveler lodging needs in Murray County. To do so, we conducted short informational interviews with a sample of 10 employers representing private industry and the public sector. We asked those interviewed to estimate the average amount of business travel they might generate. Our goal was to estimate the average number of overnight stays that could be tied to business travel.

We found from those interviews that there is demand from three organizations for blocks of rooms to support training sessions and multi-day meetings. These three organizations estimated being able to fill 15-20 rooms over two nights at least once a year. The primary impediment listed was the availability of rooms and the need for additional business-related amenities that are often provided by large chain restaurants.

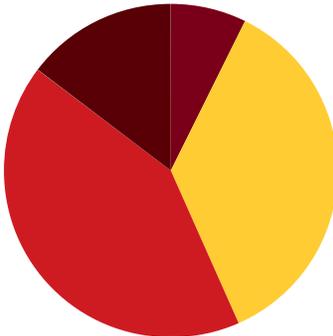
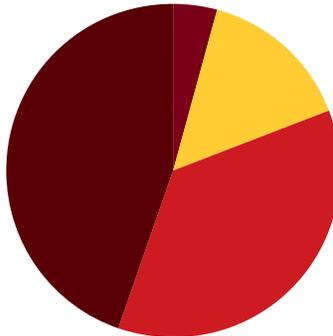
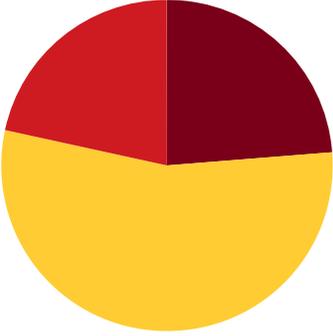
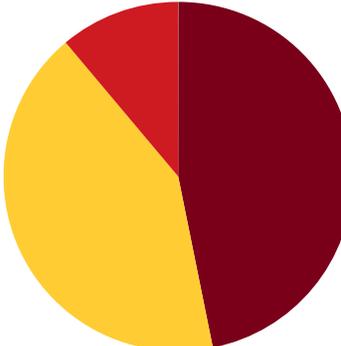
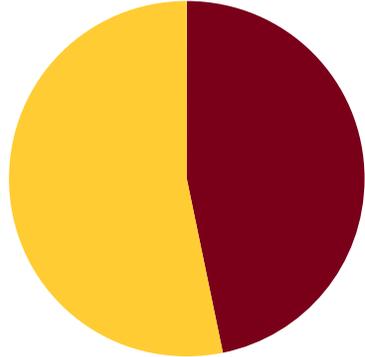
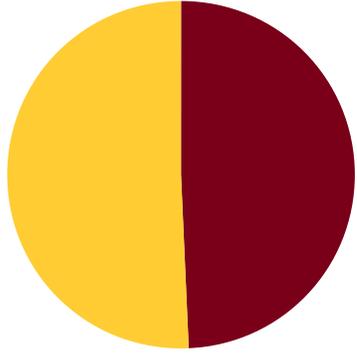
Employers also said that business travel by their vendors, customers, and regulators was relatively common. Overall, interviewees estimated this type of travel at 284 nights a year. However, it wasn't clear whether this type of travel could be captured or is currently being captured in other communities. Circuit travel was commonly mentioned, meaning visitors might travel a wide area with Murray County one of many stops. In this case, it seems that Worthington and Marshall were the most commonly mentioned locations for overnight stays.

Employers interviewed also mentioned Worthington and Marshall because they have chain hotels that offer professional travelers overnight lodging, amenities such as nearby restaurants, and business services such as Wi-Fi. However, there were three businesses that indicated zero overnight stays, which could be attributed to the nature of their organization. In those cases, business travelers were likely making day trips or staying elsewhere as part of a regional circuit. The important caveat to this type of travel is that it is occurring and is likely being met by facilities both in and outside Murray County (competitors).

REFERENCE

American FactFinder, U.S. Census Bureau. (n.d.). *2007 Economic Census: Product lines for accommodations and food service*. Generated from <http://factfinder2.census.gov>.

APPENDIX 1: DEMOGRAPHICS OF SURVEY RESPONDENTS

Visitors	Residents
<p>AGE</p>  <ul style="list-style-type: none"> ■ Less than 30 ■ 31-45 ■ 46-65 ■ Over 65 	<p>AGE</p>  <ul style="list-style-type: none"> ■ Less than 30 ■ 31-45 ■ 46-65 ■ Over 65
<p>INCOME</p>  <ul style="list-style-type: none"> ■ Less than \$50,000 ■ \$50,000 - \$100,000 ■ Greater than \$100,000 	<p>INCOME</p>  <ul style="list-style-type: none"> ■ Less than \$50,000 ■ \$50,000 - \$100,000 ■ Greater than \$100,000
<p>GENDER</p>  <ul style="list-style-type: none"> ■ Male ■ Female 	<p>GENDER</p>  <ul style="list-style-type: none"> ■ Male ■ Female

APPENDIX 2: COPY OF LAKE SHETEK STATE PARK OVERNIGHT GUEST SURVEY

Murray County Lodging Survey

In order to assist a local economic development project, please complete this survey. You were randomly chosen to participate from Lake Shetek State Park visitor records. Your responses will be used to assess the potential for additional lodging within Murray County. All of your responses will be strictly confidential and used only to develop a report of responses in aggregate. If you have questions, please contact Ryan Pesch, Extension Educator, University of Minnesota, at 218-770-4398 or pesch@umn.edu. Thank you for your assistance!

1. DNR records indicate you stayed overnight at Lake Shetek State Park between October 2011 and September 2012. Was this your first time in the Lake Shetek area? Yes No

2. If no, how often do you visit the Lake Shetek area?
 Multiple times per year (how often? ____/year) About once a year Every few years

3. What was the primary reason for your overnight stay at Lake Shetek State Park? (please check one)
 Vacation/recreation Visiting friends or relatives Business Shopping
 Just passing through (please list destination)_____

- Special event (please list event)_____

- Other (please explain)_____

3. If a hotel or motel were available which met your expectations, how likely would you stay there on a visit to the Lake Shetek area?
 Not at all likely Somewhat likely Very likely Most likely

5. When you rent a hotel or motel room, which chain do you commonly stay at (AmericInn, Motel 8)?

6. Please list the top 3 features of a lodging stay that are most important to you:
1.) _____
2.) _____
3.) _____

7. If you had to decide between low price and higher amenities which would you choose?
Low price More Amenities

8. What is a fair price to pay for a one night hotel stay that meets your expectations? _____

9. Please provide any additional comments about the potential for lodging in Lake Shetek area:

THANK YOU!

Please return this survey in the self-addressed stamped envelope provided. If lost, please return to Ryan Pesch, University of Minnesota Extension, 715 11th Street North, Suite 107C, Moorhead, MN 56560



APPENDIX 3: COPY OF MURRAY COUNTY RESIDENTS SURVEY

Murray County Lodging Survey

In order to assist a local economic development project, please complete this survey. Your responses will be used to assess the potential for additional lodging within Murray County. All of your responses will be strictly confidential and used only to develop a report of responses in aggregate. If you have questions, please contact Ryan Pesch at 218-770-4398 or pesch@umn.edu. Thank you for your assistance!

1. On average, how many times do you host overnight guests (including family and friends) each year?
-----times

2. How many nights, on average, do your overnight guests stay? ----- nights

3. If a hotel or motel were available in Murray County which met their expectations, how likely would your overnight guests have stayed there?
 Not at all likely Somewhat likely Very likely Most likely

4. Are there events locally which have brought overnight guests to your home? If so, please specify the events:

5. In the past year, how many nights did you rent a hotel or motel room nearby (within 30 miles) for a special occasion such as a birthday party, pool party, anniversary, or other function? ----- nights
Please specify the city: -----

6. If a hotel or motel were available in Murray County which met your expectations, how likely would you have rented a room there?
 Not at all likely Somewhat likely Very likely Most likely

7. When you rent a hotel or motel room, which chain do you commonly stay at (AmericInn, Motel 8, etc)?

8. Are you involved in an organization which rents meeting space? Yes No
If yes, how often do you rent meeting space (monthly, weekly, etc.)? -----
If yes, would your organization consider changing from its current meeting location?
 Not at all likely Somewhat likely Very likely Most likely

9. Will you or an organization you are involved in host a special event in the next 5 years such as a wedding, reunion, or annual banquet where you would use banquet or reception space?
 Yes No

If yes, please specify: _____

10. If a hotel or motel in Murray County had reception or banquet space which met your expectations, would you consider renting space there for your special event? Yes No

11. Please list the top 5 features of a lodging stay that are most important to you:

- 1.) _____
- 2.) _____
- 3.) _____
- 4.) _____
- 5.) _____

12. If you had to decide between low price and higher amenities which would you choose?
Low price More Amenities

13. What is a fair price to pay for a one-night hotel stay that meets your expectations? _____

14. Please provide any additional comments about the potential for lodging in Murray County:

THANK YOU!

Please return this survey in the self-addressed stamped envelope provided.

APPENDIX 4: GEOGRAPHIC SUMMARY REPORT OF 2012 LAKE SHETEK SP GUESTS

<p>The geographic summary displays the top 20 states, counties, ZIP Codes and MAs in rank order.</p> <p>A. 1,993 (81.05%) of your records are in the state of Minnesota (27).</p> <p>B. 227 (9.23%) of your records are in Hennepin County, MN county. The number after the county (27053) is county FIPS code.</p> <p>C. Records that cannot be matched at the designated level are noted at the bottom of each section.</p> <p>D. 107 (4.35%) of your records are in Marshall ZIP Code 56258. The top-ranked ZIP Code.</p> <p>E. In addition of the top 20 ZIP Codes, there are 1,774 'Other ZIP Codes' represented in your customer database (72.14% of all records).</p> <p>F. 665 (27.04%) of your records are located within the Minneapolis-St. Paul-Bloomington, MN-WI (33460) Metropolitan Area.</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Top 20 States Name</th> <th style="text-align: center;">Count</th> <th style="text-align: center;">Percent</th> </tr> </thead> <tbody> <tr><td>Minnesota (27)</td><td style="text-align: center;">1,993</td><td style="text-align: center;">81.05</td></tr> <tr><td>South Dakota (46)</td><td style="text-align: center;">183</td><td style="text-align: center;">7.44</td></tr> <tr><td>Iowa (19)</td><td style="text-align: center;">121</td><td style="text-align: center;">4.92</td></tr> <tr><td>Nebraska (31)</td><td style="text-align: center;">30</td><td style="text-align: center;">1.22</td></tr> <tr><td>Wisconsin (55)</td><td style="text-align: center;">17</td><td style="text-align: center;">0.69</td></tr> <tr><td>North Dakota (38)</td><td style="text-align: center;">14</td><td style="text-align: center;">0.57</td></tr> <tr><td>Michigan (26)</td><td style="text-align: center;">13</td><td style="text-align: center;">0.53</td></tr> <tr><td>Florida (12)</td><td style="text-align: center;">10</td><td style="text-align: center;">0.41</td></tr> <tr><td>Colorado (08)</td><td style="text-align: center;">10</td><td style="text-align: center;">0.41</td></tr> <tr><td>Pennsylvania (42)</td><td style="text-align: center;">9</td><td style="text-align: center;">0.37</td></tr> <tr><td>Virginia (51)</td><td style="text-align: center;">5</td><td style="text-align: center;">0.20</td></tr> <tr><td>Texas (48)</td><td style="text-align: center;">5</td><td style="text-align: center;">0.20</td></tr> <tr><td>California (06)</td><td style="text-align: center;">5</td><td style="text-align: center;">0.20</td></tr> <tr><td>Illinois (17)</td><td style="text-align: center;">4</td><td style="text-align: center;">0.16</td></tr> <tr><td>Missouri (29)</td><td style="text-align: center;">4</td><td style="text-align: center;">0.16</td></tr> <tr><td>Ohio (39)</td><td style="text-align: center;">4</td><td style="text-align: center;">0.16</td></tr> <tr><td>Georgia (13)</td><td style="text-align: center;">4</td><td style="text-align: center;">0.16</td></tr> <tr><td>Indiana (18)</td><td style="text-align: center;">3</td><td style="text-align: center;">0.12</td></tr> <tr><td>Oregon (41)</td><td style="text-align: center;">3</td><td style="text-align: center;">0.12</td></tr> <tr><td>Tennessee (47)</td><td style="text-align: center;">3</td><td style="text-align: center;">0.12</td></tr> <tr><td>Other States</td><td style="text-align: center;">19</td><td style="text-align: center;">0.77</td></tr> <tr><td>Non-geocoded Records</td><td style="text-align: center;">0.00</td><td style="text-align: center;">0.00</td></tr> </tbody> </table> <table border="1" style="width: 100%; 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56258 Marshall, MN	107	4.35																																																																																																																																																																																																																																																																														
56187 Worthington, MN	55	2.24																																																																																																																																																																																																																																																																														
56164 Pipestone, MN	51	2.07																																																																																																																																																																																																																																																																														
56081 Saint James, MN	44	1.79																																																																																																																																																																																																																																																																														
56172 Slayton, MN	42	1.71																																																																																																																																																																																																																																																																														
56175 Tracy, MN	38	1.55																																																																																																																																																																																																																																																																														
56073 New Ulm, MN	37	1.50																																																																																																																																																																																																																																																																														
57106 Sioux Falls, SD	34	1.38																																																																																																																																																																																																																																																																														
56001 Mankato, MN	30	1.22																																																																																																																																																																																																																																																																														
56101 Windom, MN	29	1.18																																																																																																																																																																																																																																																																														
55124 Saint Paul, MN	27	1.10																																																																																																																																																																																																																																																																														
56183 Westbrook, MN	24	0.98																																																																																																																																																																																																																																																																														
57108 Sioux Falls, SD	24	0.98																																																																																																																																																																																																																																																																														
56082 Saint Peter, MN	23	0.94																																																																																																																																																																																																																																																																														
56123 Currie, MN	21	0.85																																																																																																																																																																																																																																																																														
56180 Walnut Grove, MN	21	0.85																																																																																																																																																																																																																																																																														
55379 Shakopee, MN	20	0.81																																																																																																																																																																																																																																																																														
56003 Mankato, MN	20	0.81																																																																																																																																																																																																																																																																														
56171 Sherburn, MN	19	0.77																																																																																																																																																																																																																																																																														
55304 Andover, MN	19	0.77																																																																																																																																																																																																																																																																														
Other ZIP Codes	1,774	72.14																																																																																																																																																																																																																																																																														
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Top 20 CBSAs Name	Count	Percent																																																																																																																																																																																																																																																																														
Minneapolis-St. Paul-Marshall, MN (32140)	665	27.04																																																																																																																																																																																																																																																																														
Sioux Falls, SD (43620)	124	5.04																																																																																																																																																																																																																																																																														
Worthington, MN (49380)	102	4.15																																																																																																																																																																																																																																																																														
Mankato-North Mankato, MN (35580)	100	4.07																																																																																																																																																																																																																																																																														
New Ulm, MN (26780)	80	2.44																																																																																																																																																																																																																																																																														
Hutchinson, MN (26780)	34	1.38																																																																																																																																																																																																																																																																														
Fairmont, MN (21860)	34	1.38																																																																																																																																																																																																																																																																														
St. Cloud, MN (41060)	25	1.02																																																																																																																																																																																																																																																																														
Rochester, MN (40340)	21	0.85																																																																																																																																																																																																																																																																														
Omaha-Council Bluffs, NE-Sioux City, IA-NE-SD	18	0.73																																																																																																																																																																																																																																																																														
Fargo, ND-MN (22020)	15	0.61																																																																																																																																																																																																																																																																														
Willmar, MN (48820)	15	0.61																																																																																																																																																																																																																																																																														
Brookings, SD (15100)	14	0.57																																																																																																																																																																																																																																																																														
Faribault-Northfield, MN	14	0.57																																																																																																																																																																																																																																																																														
Albert Lea, MN (10660)	12	0.49																																																																																																																																																																																																																																																																														
Austin, MN (12380)	12	0.49																																																																																																																																																																																																																																																																														
Denver-Aurora, CO (19740)	10	0.41																																																																																																																																																																																																																																																																														
Brainerd, MN (14660)	9	0.37																																																																																																																																																																																																																																																																														
Other CBSAs	199	8.09																																																																																																																																																																																																																																																																														
Records not in an CBSAs	793	32.25																																																																																																																																																																																																																																																																														

Source: Esri, 2010 Estimates and Projections

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APPENDIX 5: ADDITIONAL COMMENTS FROM SURVEYS

Resident Survey

- I work for ADM and we have people from Illinois needing a place to stay.
- Fulda has many wedding receptions at the community building and overnight guests are forced to go to Worthington.
- With Marshall and Worthington so close, they are convenient to get to for the pool access. If you're looking for rest, the Hill Top Inn is a nice place to kick your feet up!
- A national chain motel in Slayton would be convenient.
- Although I probably wouldn't use one much, I do think it would be nice to have a hotel.
- A Super 8 or something close to that would work.
- Murray County needs more industry not motels. We need more jobs.
- Would be nice for special events.
- It would be a very valuable asset to the community!
- An overnight campground.
- Holidays and summer are when my guests (family) are most likely to visit.
- I'm sorry; to waste tax payer funds would be very foolish in this economy! There is little or no need in Slayton for a hotel; there's nothing to draw people other than the horse show one week a year.
- Nice motel.
- A hotel is always a plus to grow any community!
- While a place to hold 350 people for events, meetings, etc. would be nice, I'm not sure it is feasible for an area like Murray County.
- I don't think we need any.
- A new hotel would be wonderful!
- There isn't much here, and one hotel is always full, or on Shetek and too far away.
- I think Slayton could use a nice hotel.... [P]eople do not want to drive 30 minutes to a hotel. I stay on the road some and having it near a restaurant and/or bar would be a plus.
- Fulda needs senior apartments with garages that have no outside upkeep for the residents.
- The population of Murray Co. is decreasing. If a motel were built I would suggest around the lakes area.

- Older people have less opportunity to use motel facilities.
- Needed.
- Murray County has a need for more lodging.
- We have a good motel in Slayton.
- Murray County EDA questioned the current motel owner and they were told straight out that it was hard to make ends meet. So why is Murray County EDA wasting money on this survey and why is it done out of Marshall? We have our own U of M Extension in Slayton. This is a total waste of county and state money.
- We need more affordable living for our older folks in our area.
- If companies could see a potential for profit they would probably have built already.
- We need more hotels in the area of Slayton.
- It would be safer to have lodging in Slayton when the winter weather closes roads.
- A motel near the golf course in Fulda would be a real asset.
- Yes, there is a need for more lodging in the area. My daughters had a difficult time planning their weddings because of nowhere for guests to stay. Nowadays everyone expects a pool.
- Murray County is a big county. No matter where a motel was built, half of the county would be closer to existing motels in Pipestone, Marshall, or Worthington.
- I would invite friends from out of state to visit if we had a nice lodging place available.
- I think we are blessed to have the Hill Top home-owned.
- We haven't rented a hotel/motel room in years, so I don't know what a fair price would be.
- I would recommend the lakes area for lodging.
- A hotel closer than 30 miles would be nice, such as Slayton or Tracy.
- Because we need something to bring people to stay.
- Wedding reception place would be most important with decent lodging close by.

Visitor Survey

- Because of our close proximity to the area, we would camp at the state park.
- Within 15 miles of Wilder Pageant would be convenient for people. Please continue to provide good camping facilities, which we enjoy.

- Mostly we camp, which is what we did at Lake Shetek.
- We go to that area to camp, so a place that provided lodging for extended family that may want to join us but not camp.
- I no longer have close family in the area, so I no longer have reason to visit.
- We would camp at the state park again and not stay in a hotel. We enjoy camping and it's a great park!
- We use camping facilities.
- Lodging is needed on the lake
- Unless the lodging was on the lake I don't think people would utilize it as there is nothing to do in the area.
- We like to camp so we wouldn't stay in a hotel.
- Can't think of any comments. We loved our stay and will be back in 2013.
- More camping?
- Close to bike/hike trails, bike rentals.
- We enjoy camping at Lake Shetek
- The cabins at Lake Shetek were beautiful. More cabin-style lodging with additional amenities (bathroom, running water) that blend into the surroundings of Lake Shetek would be a nice addition.
- Most generally we use camping in our trailer when we can.
- Cleaner lodging by Key Largo area.
- We loved the campground and area.
- Pretty remote area — may be hard to support nicer hotels.
- The state park is an attraction.
- We only camped there, but prefer lakes with better beaches.
- We only camp at Lake Shetek for a family reunion.
- We live nearby and for family events such as weddings there are not many places to choose from.
- The lake is a beautiful asset. We really enjoyed our stay and advertised it to other campers.
- The potential for development of the Lake Shetek area has been maximized. Focus on the quality of what currently exists rather than adding quantity. It is a small lake area in

danger of over-development.

- We only used campgrounds.
- I really liked the state park. If you build something, make sure it fits in with the park and surroundings.
- We camp at campgrounds during the summer months.
- Prefer to stay at the state park
- I went there to camp and I don't anticipate I would ever stay in a hotel there.
- We don't use a motel, we use our camper.
- We are a camping family and usually only stay at hotels in winter months.
- Given that it is a recreational area, hotels should accept pets (dogs).
- State park campground is very nice.
- We stayed at the camper cabins at Lake Shetek State Park on our visit and they were great. Close to the lake, bike trails, and very affordable.
- I would be interested in hotel lodging if it were like a lodge - not the same old hotel you can get anywhere.
- It's important that each community have a website that lists local lodging and camping.
- We will stay at the same State Park again, but would not stay in a hotel/motel.
- I prefer staying at camp grounds.
- The only reason I filled out this survey is that I feel you need to change the outhouse in the new area to a regular bath house. You already have water, sewer, and electricity in that area. Showers and flush toilets are a good distance away from the area. Putting a non-flush outhouse in this new area of the park was stupid. Put a regular bath house in this area and I will more than likely camp at Lake Shetek Park again.
- We have a camper so we will most likely camp.
- Please have a TV, pool, and Jacuzzi/hot tub
- Keep the rooms simple; people are there to enjoy the park/lake area. Have a nice deck for gathering that will overlook the lake. Boat slips for rent. Bait available with cleaning area for game/fish. Gas available would be nice, but not a must have. Fire ring near the lake, large enough for 10-15 people to gather around. Parking for trucks with trailer still hooked up. Dog kennels for rent - larger breeds like [L]abs, German Shepherds. It should say, "Welcome, you are at home."
- I do not need a swimming pool. I just want a clean, quiet place to sleep and shower.

- We enjoyed camping at the state park. We rarely utilize hotels unless we are vacationing in Minnesota during the winter.
- We enjoyed staying in the camper cabin at Lake Shetek. Yes, if we needed to stay in that area again we would choose Lake Shetek or another State Park. We very much like staying in State Parks.
- We live in our RV full time, which is why we don't stay in hotels. We were very pleased with the state park!
- We are mainly there to camp and stay at the state park, not a hotel.
- We are most interested in staying again at the state park so amenities, etc. are of lower priority for family camping trips.
- Loved the park, but we explored that area enough. We're moving on.
- The reason I stay at the park is to camp. I do not think we need a motel chain there.
- We don't stay at hotels as we end up with 2 rooms and that is too expensive. I was very happy with our camping experience.
- We mostly camp and visited Lake Shetek for the passport club stamp as part of our vacation to the Black Hills. If we visited the area again we would camp at the state park, not stay in a hotel.
- Weekend bundle, i.e. two nights, coordinated with special event in the area. When we were at Lake Shetek we were really delighted to discover the historical sites and also enjoyed a fall party event hosted by the friends of Lake Shetek. We wish we could have seen the pelicans. We enjoyed the bike trail.
- It strikes me that Lake Shetek draws people from the surrounding area. Unless considerable advertising was done, I don't see large numbers staying in a motel.
- Group lodge for bigger families.
- Outdoor activities – biking, walking paths are great.
- We camp, so that's the only reason we stayed in the area.
- Swimming pool for the kids.
- We have a camper, which we stayed in at Lake Shetek. Had we not been camping with family, we probably would not have gone there. However, we loved the area and will be back – with the camper.
- We generally take our RV, so we usually don't stay at hotels.
- I normally camp.
- It was a nice park.

