



Embracing the Roller Coaster

Insights on the highly seasonal economy of
Minnesota lakes country

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Community tourism development



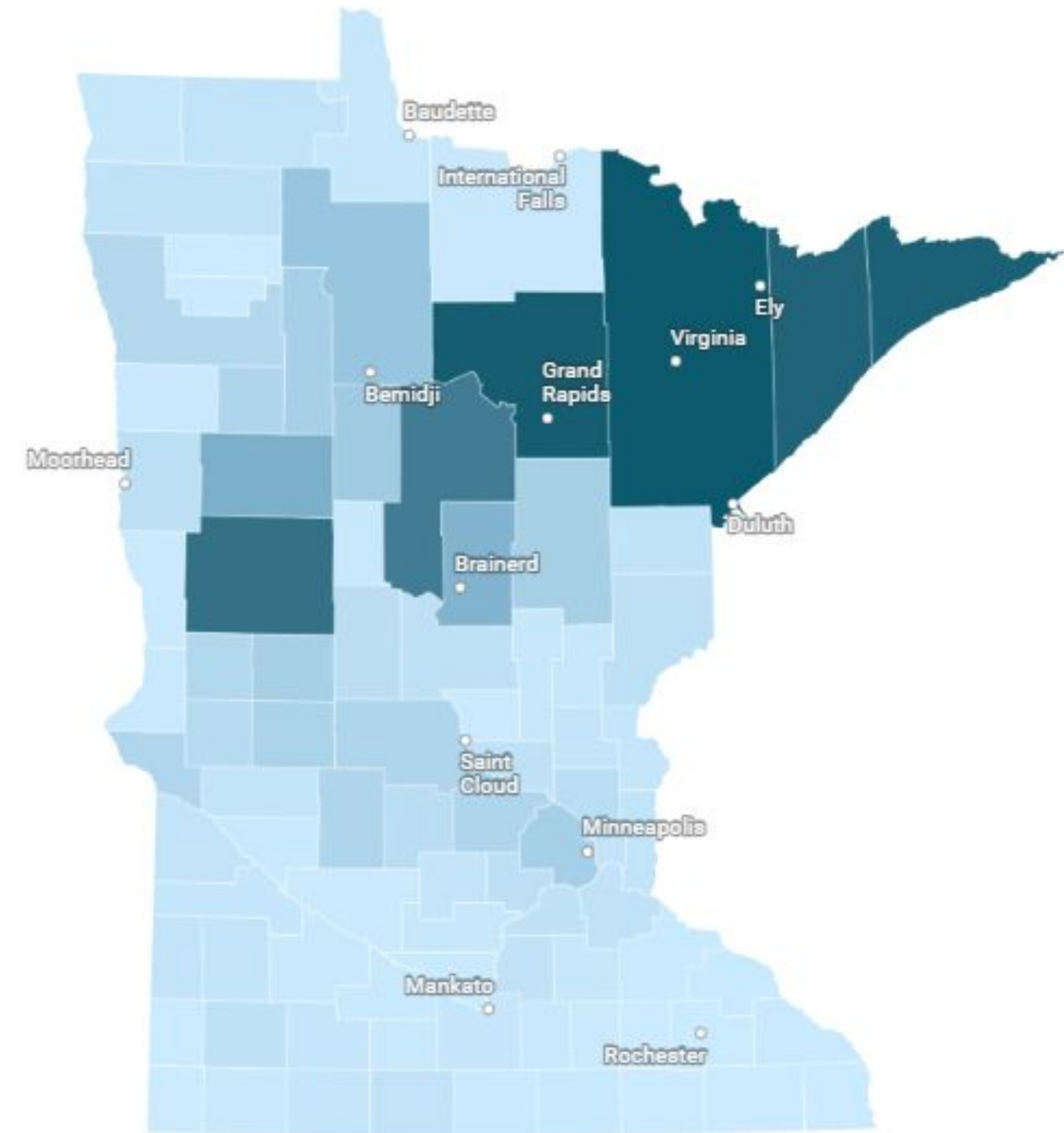
Distribution of Minnesota's 10,000+ lakes

Map source: KAXE News

<https://www.kaxe.org/local-news/2025-08-05/which-minnesota-county-has-the-most-lakes-its-a-bit-complicated>

By one count, Arrowhead counties dominate the lake race

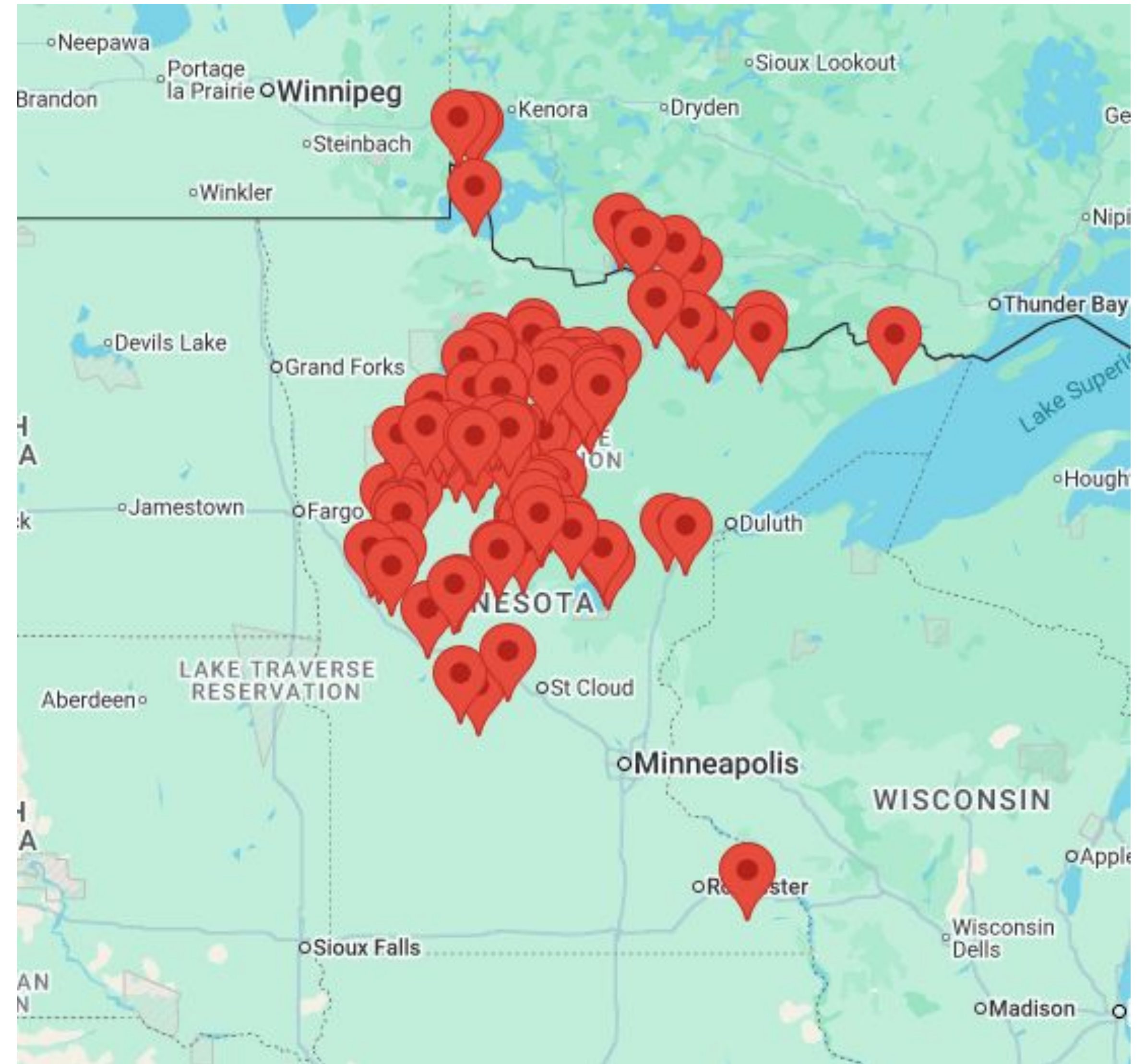
St. Louis, Lake, Cook and Itasca counties each have over 800 lakes. Those and Otter Tail and Cass (over 700 each) dominate the field.



Map: Megan Buffington/KAXE • Source: Minnesota Public Waters Inventory • Get the data • Embed • Created with Datawrapper

Resorts are concentrated in northern half of the state.

Map source: Community of Minnesota Resorts <https://minnesota-resorts.com>

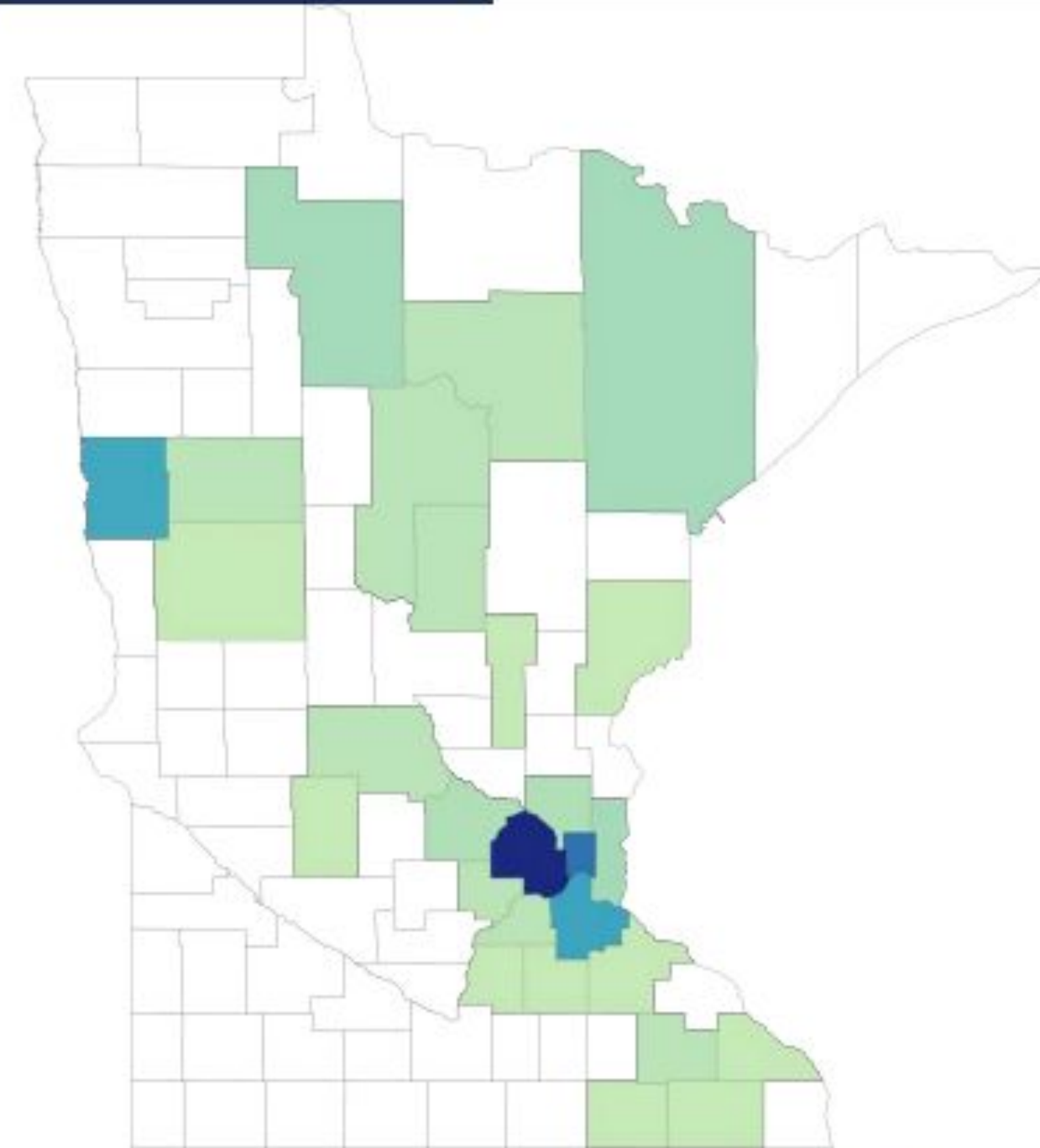


Overnight camps are most common in regions with lakes.

Source: National Economic Impact Study of The Camp Industry.
Economic Growth Institute
University of Michigan

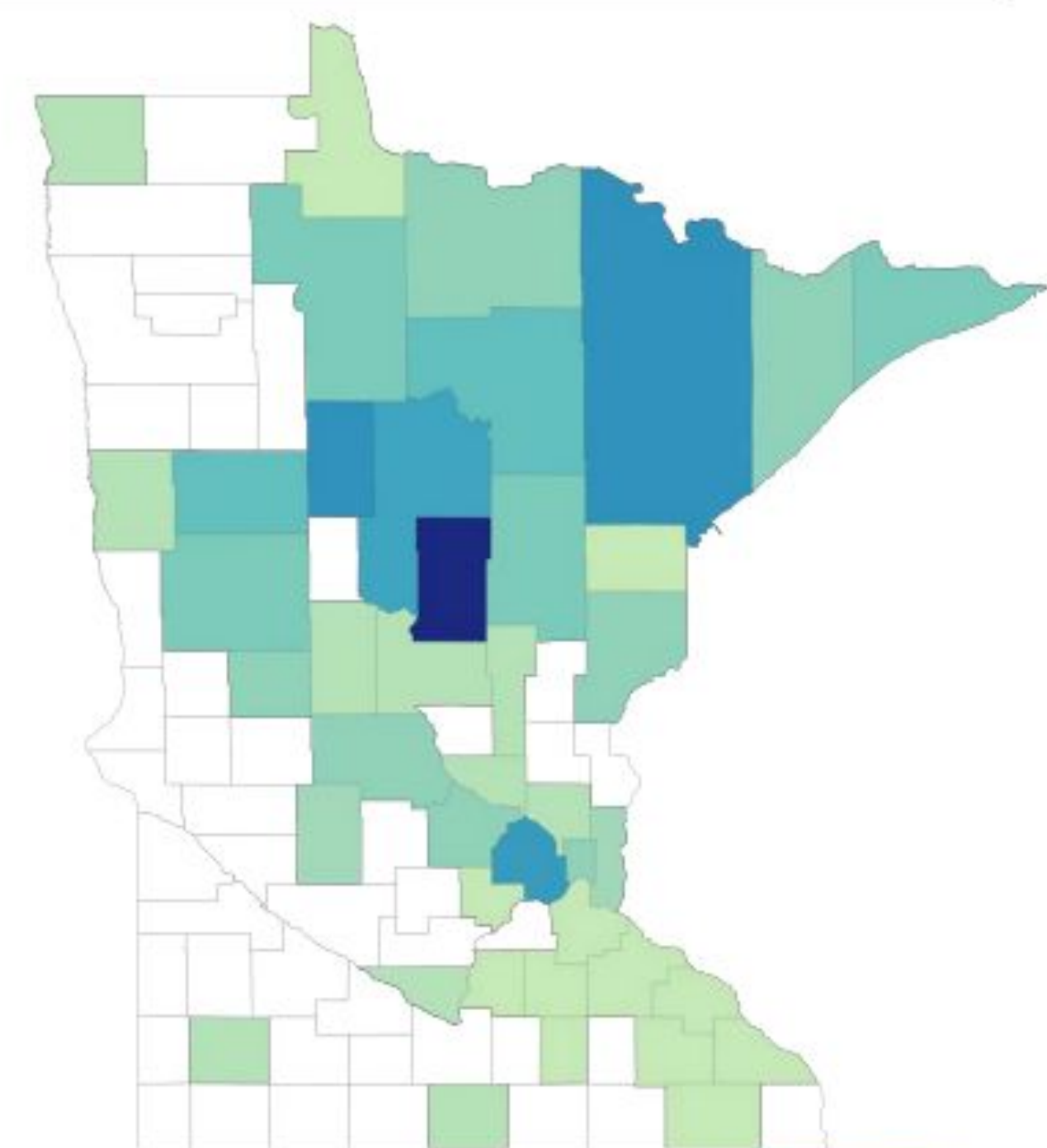
Camp Census: Minnesota.

Camp Census
Minnesota



Identified Camp Operations with
Day Programs:

131



Identified Camp Operations with
Overnight Programs:

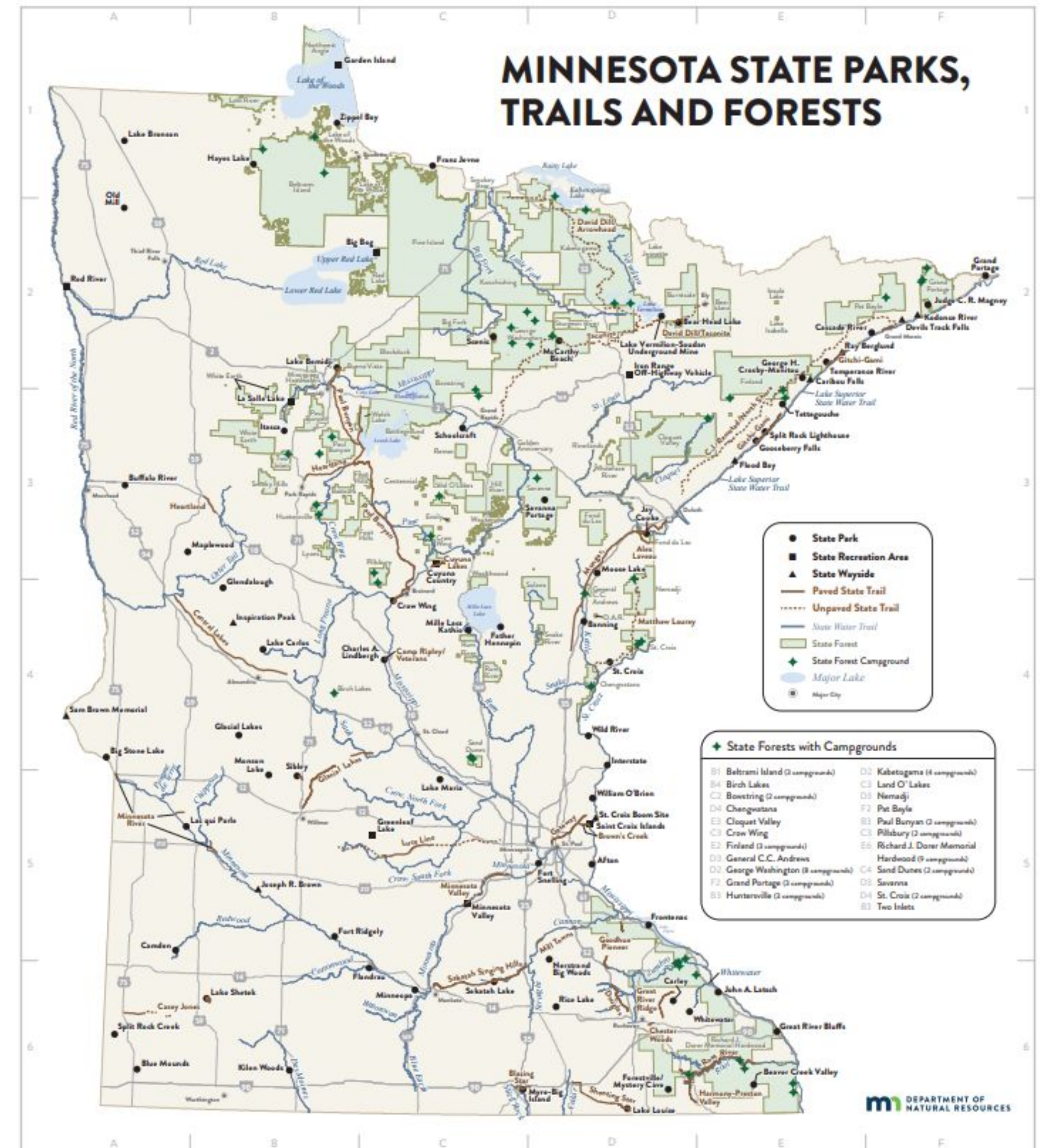
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University of Michigan Economic Growth Institute | American Camp Association

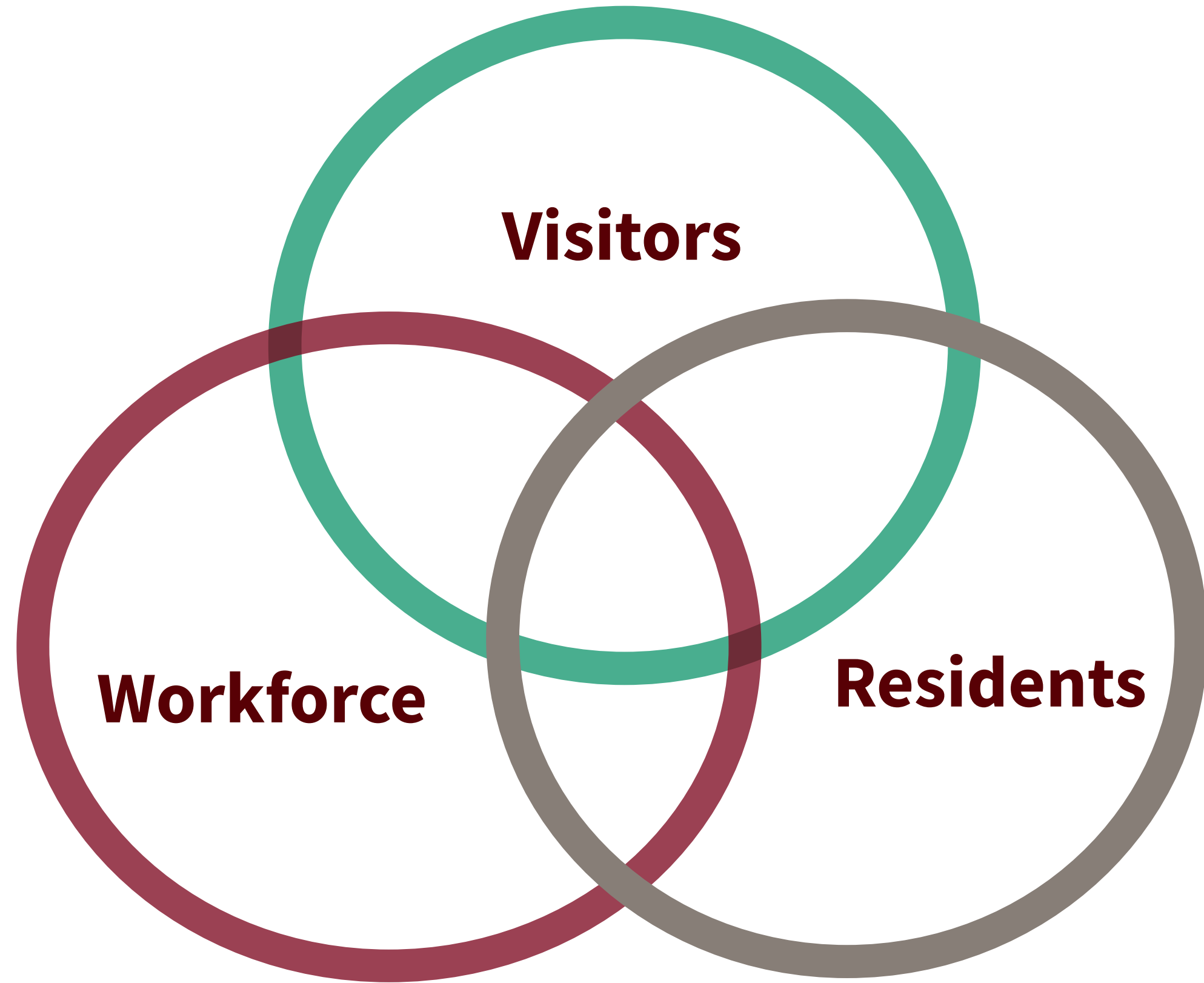
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Additional outdoor recreation is abundant in the northern region.

Map source: MN Department of Natural Resources
<https://files.dnr.state.mn.us/maps/patgui/DEMAPPDF.pdf>
DD



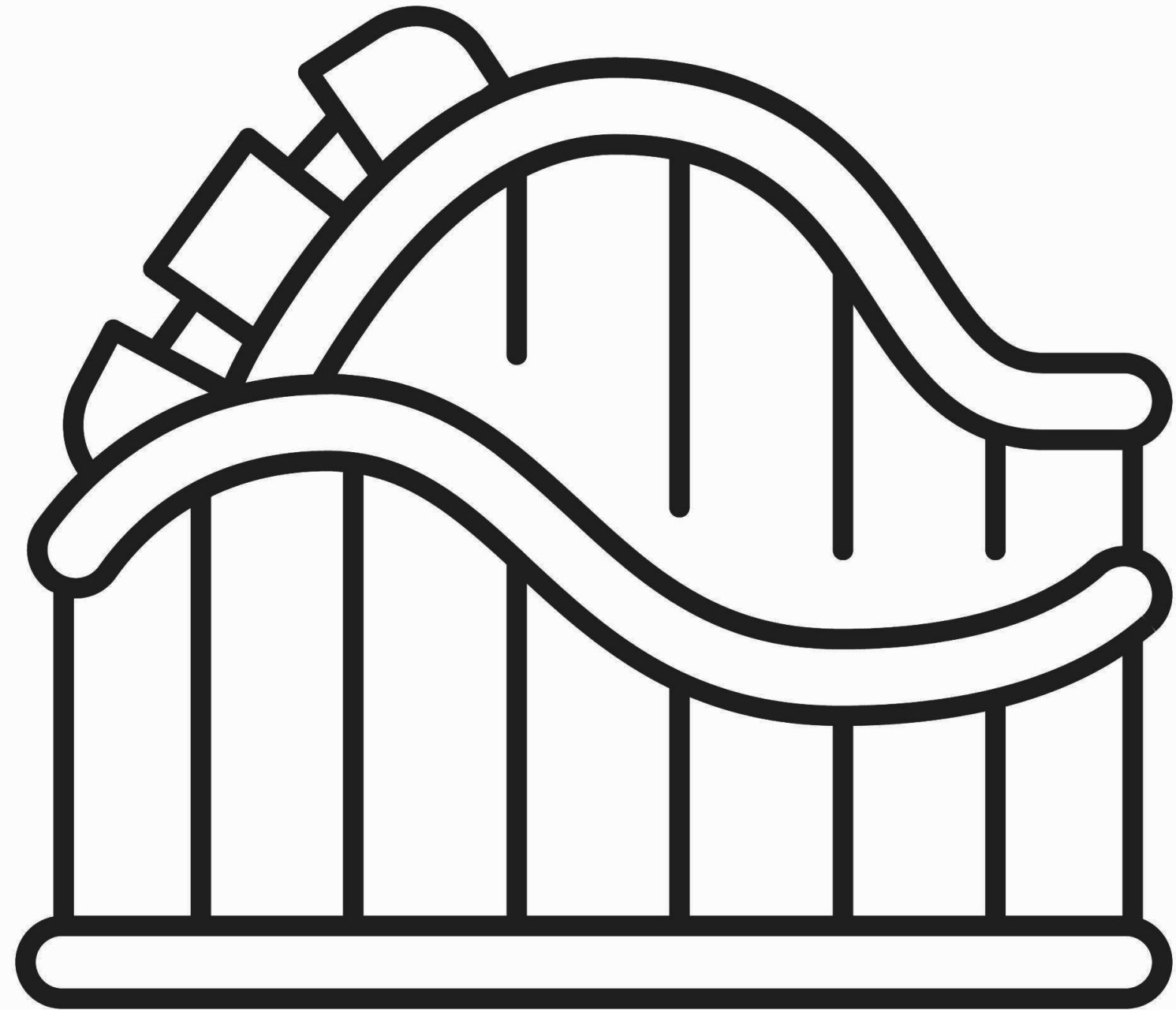
What is your connection to community?



- Few people stay in one home their whole lives. Often education and jobs can prompt changes in resident connections.
- Visitors may have seasonal homes, family in the area, or stay at hotels or resorts.
- Employees may be seasonal or year-round.



Highly seasonal economies



*feels like a roller
coaster!*

- Wide swings in population, workforce and/or tourist volume.
- Business revenue and personal incomes follow seasonal trends.
- Related to seasonal industries such as tourism and agriculture.
- Vulnerable to interruptions from outside forces such as weather, trade policies and fuel prices.



Common connections

Visiting friends & family

- Stay with family and friends versus paid lodging.
- Not included in “heads in beds counts”

Seasonal resident

- Typically own their RV, cabin, or second home.
- Visit length varies widely.
- Longer stays may have more “local resident” behaviors.

Local resident

- Can be defined by political boundaries like city limits.
- Shopping, work and school patterns shape who considers themselves local.

Regional resident

- Typically focused on residents within 50 miles of study location.
- Can be defined by political boundaries like county borders, school districts, etc.



Mobile data

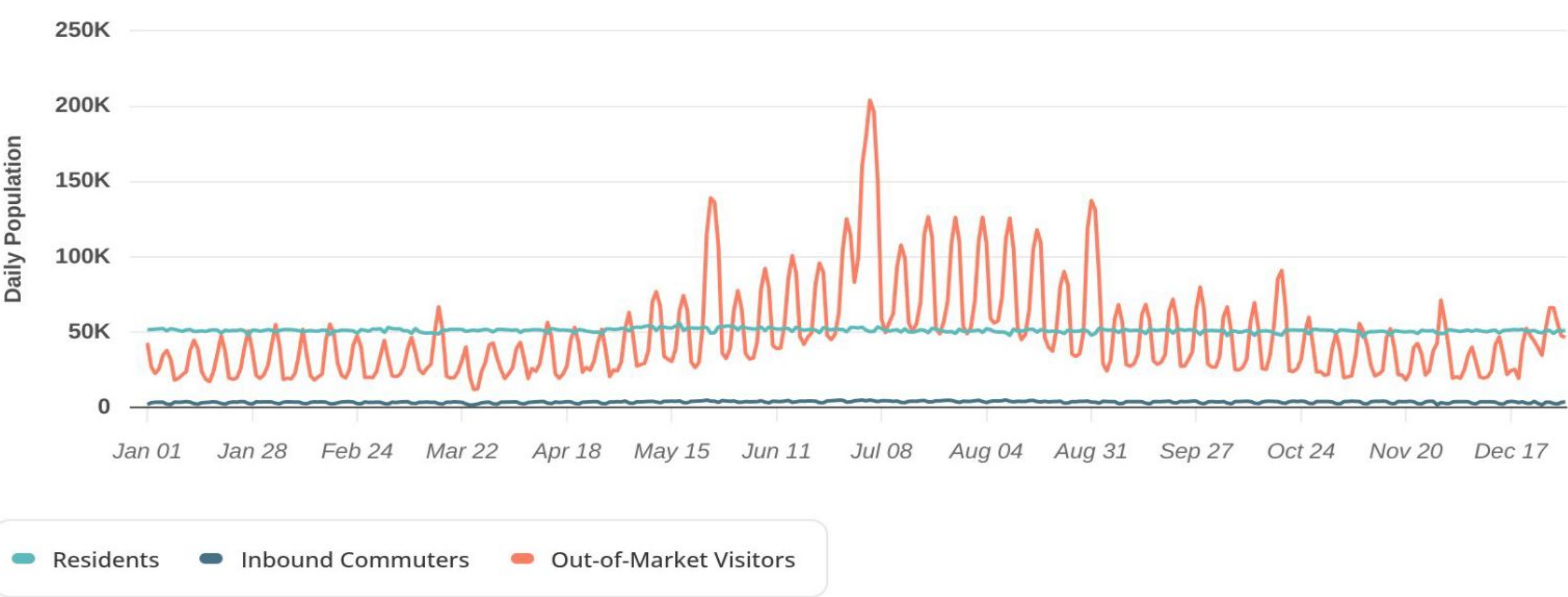


- Locations are tracked on mobile device apps as users move through their day-to-day lives.
- Provides an estimate of visits to a selected geographic area; not an exact count of visitors.
- Does not include minors or visitors without a mobile device.



Daily Population Trend

Crow Wing
County • Minnesota



Avg. Daily Population	
	48K
	4K
	51K

Daily | Visits | Jan 1st, 2024 - Dec 31st, 2024
Data provided by Placer Labs Inc. (www.placer.ai)

Key observations

- Resident population is very stable.
- Visitor counts vary widely throughout the year, with peak traffic focused on weekends and holidays.
- Commuter traffic is very consistent with higher traffic during the work week.

Community Connections BINGO

Regional resident	Local resident	Year-round employee
Seasonal resident (30+ days)	FREE SPACE	Summer worker
Tourist	Seasonal weekender	Visiting friends & family

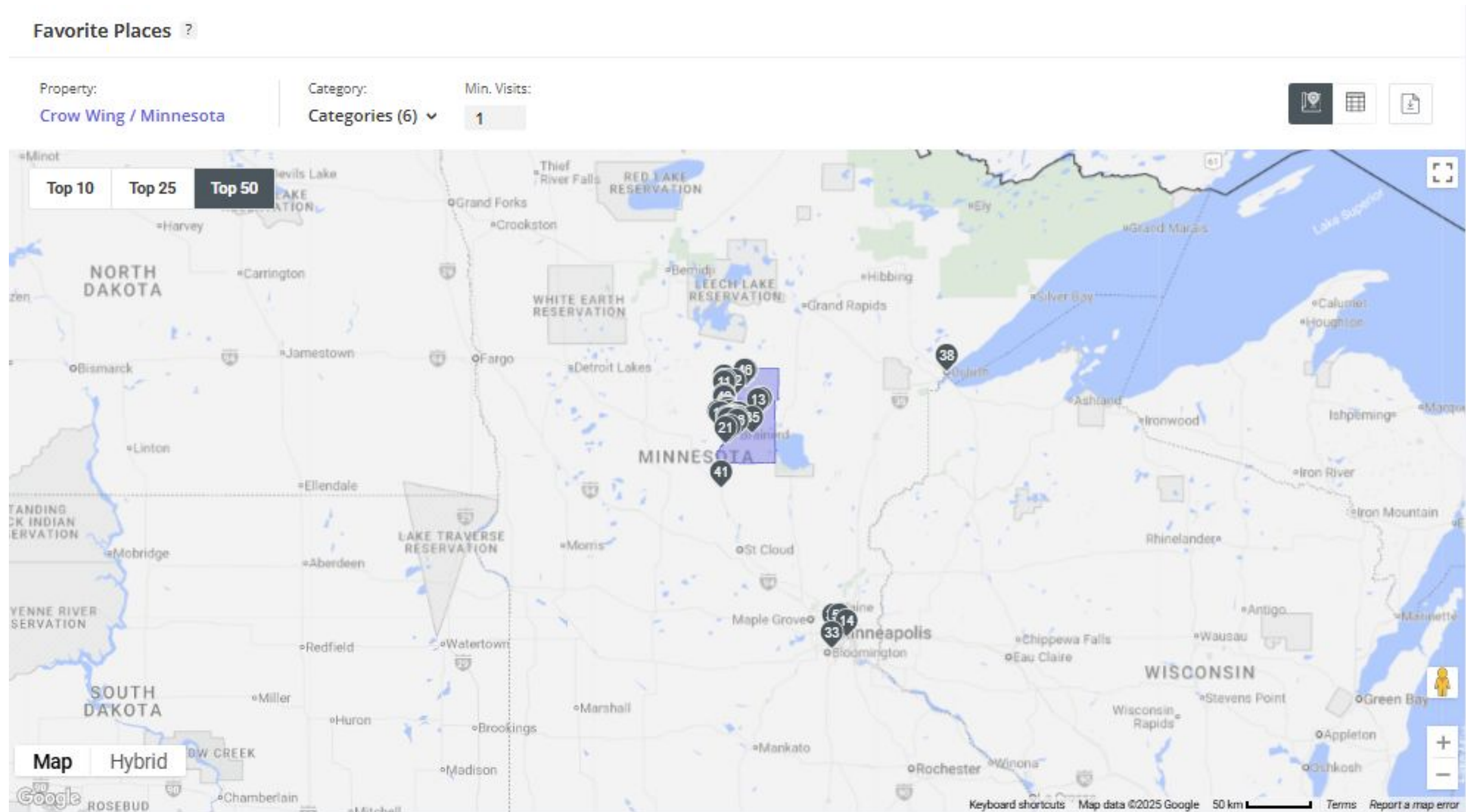
- As each connection is called out, mark your connections on your card.
- Blackout BINGO is the goal - who can get closest?
- Anyone with blackout BINGO?
- Anyone with just one space filled?



Sustainable Community Development

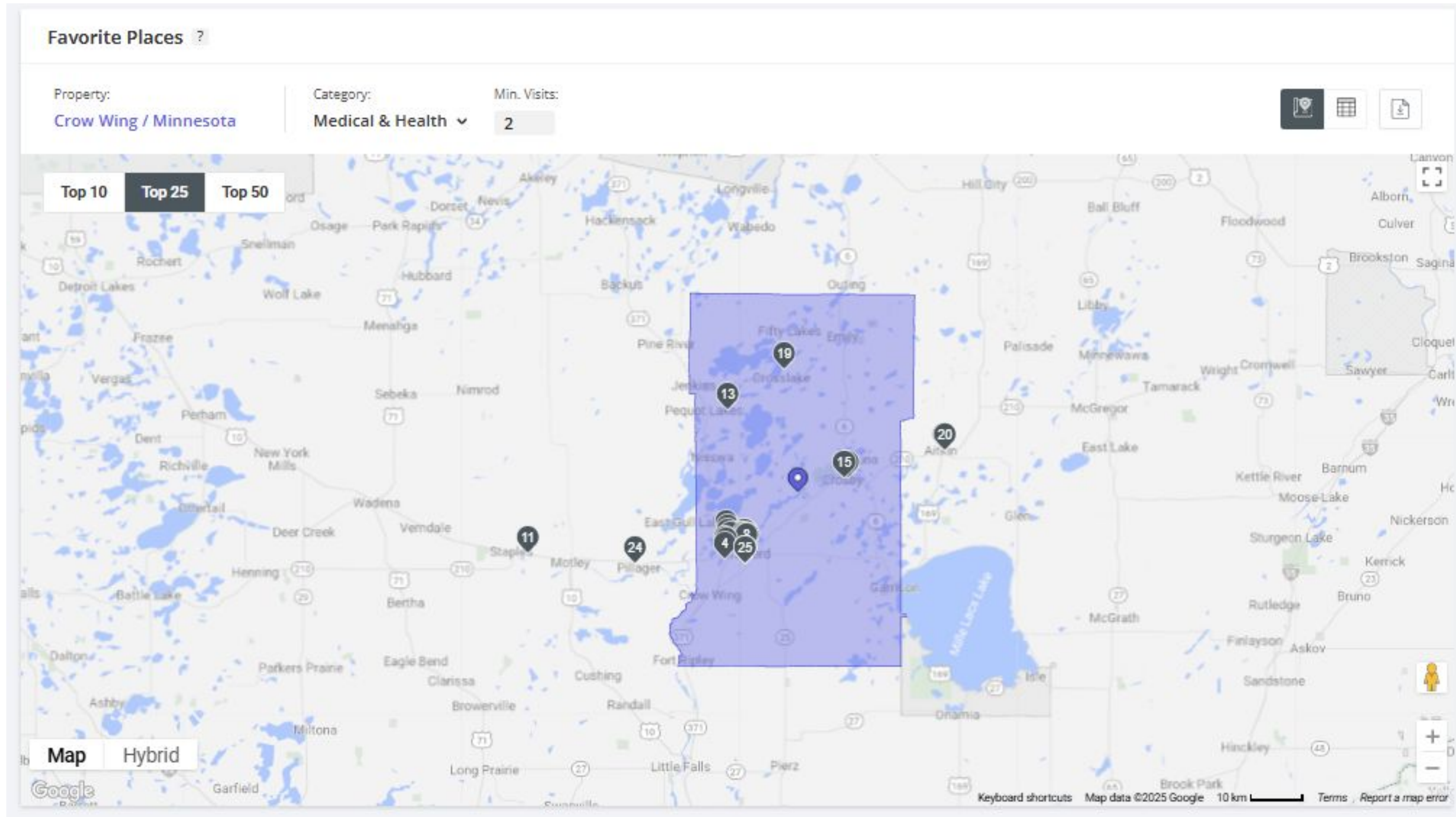


Resident Favorite Places: leisure & outdoor recreation

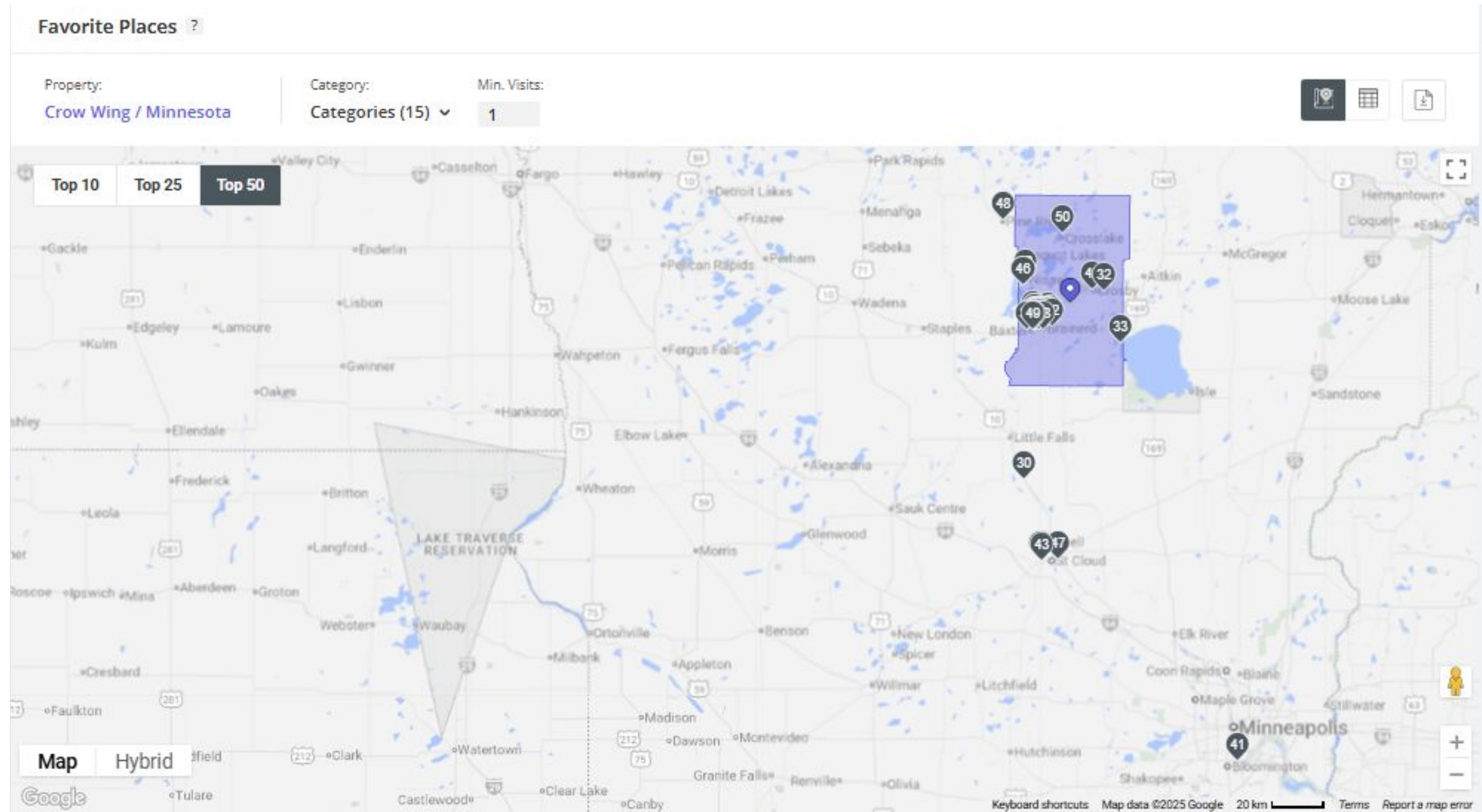


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Resident Favorite Places: medical care



Resident Favorite Places: shopping



Foundations of Authentic Events

Public events & festivals

Opportunities for residents and visitors to experience the community.

Historical context

Timeline of natural history, community growth and migration trends, including Indigenous roots.

Local interests

Volunteers, board members, and patrons who develop and attend events and festivals.

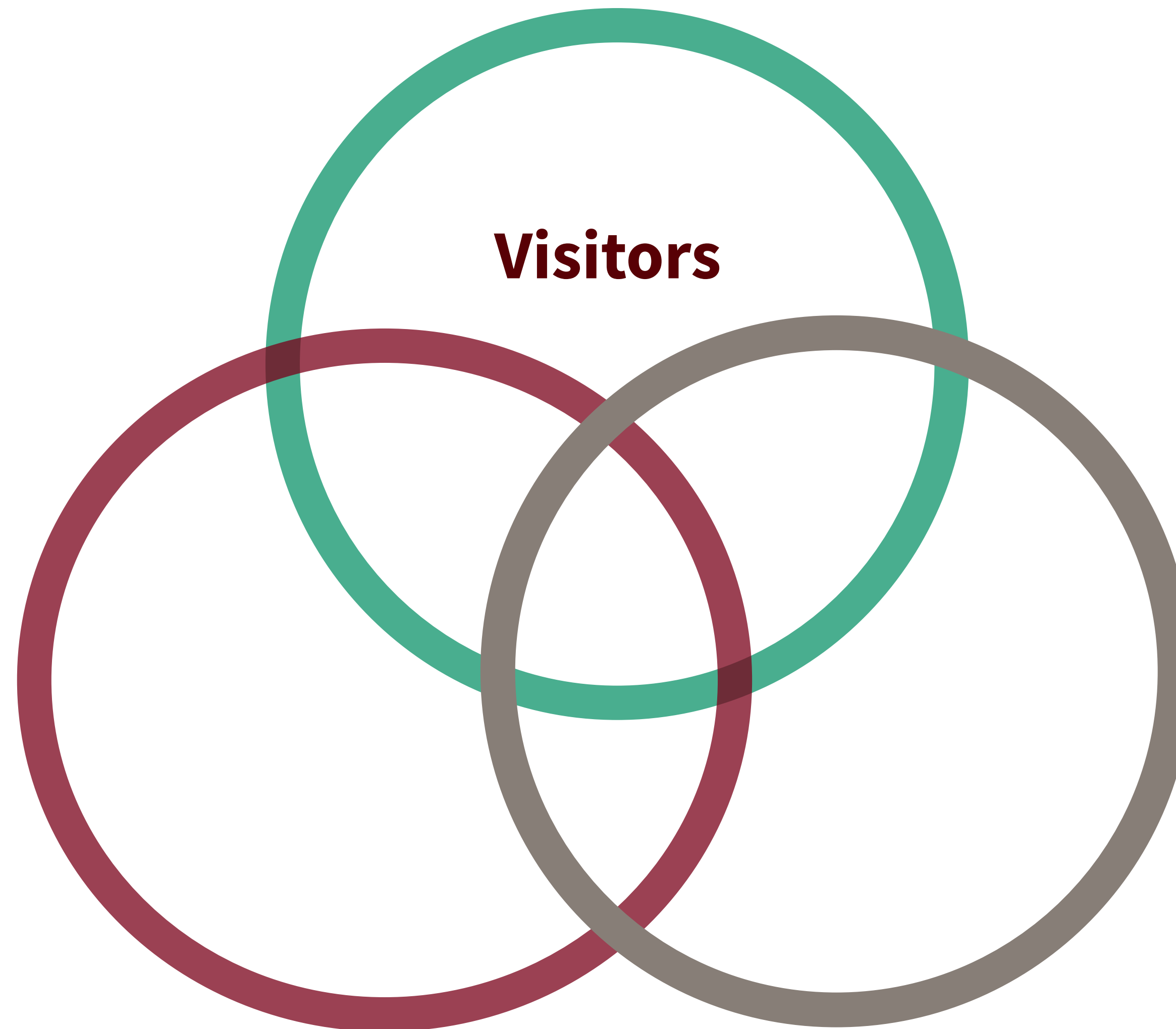
Community touchstones

Unique “claims to fame” that can be reimagined or renewed over time.

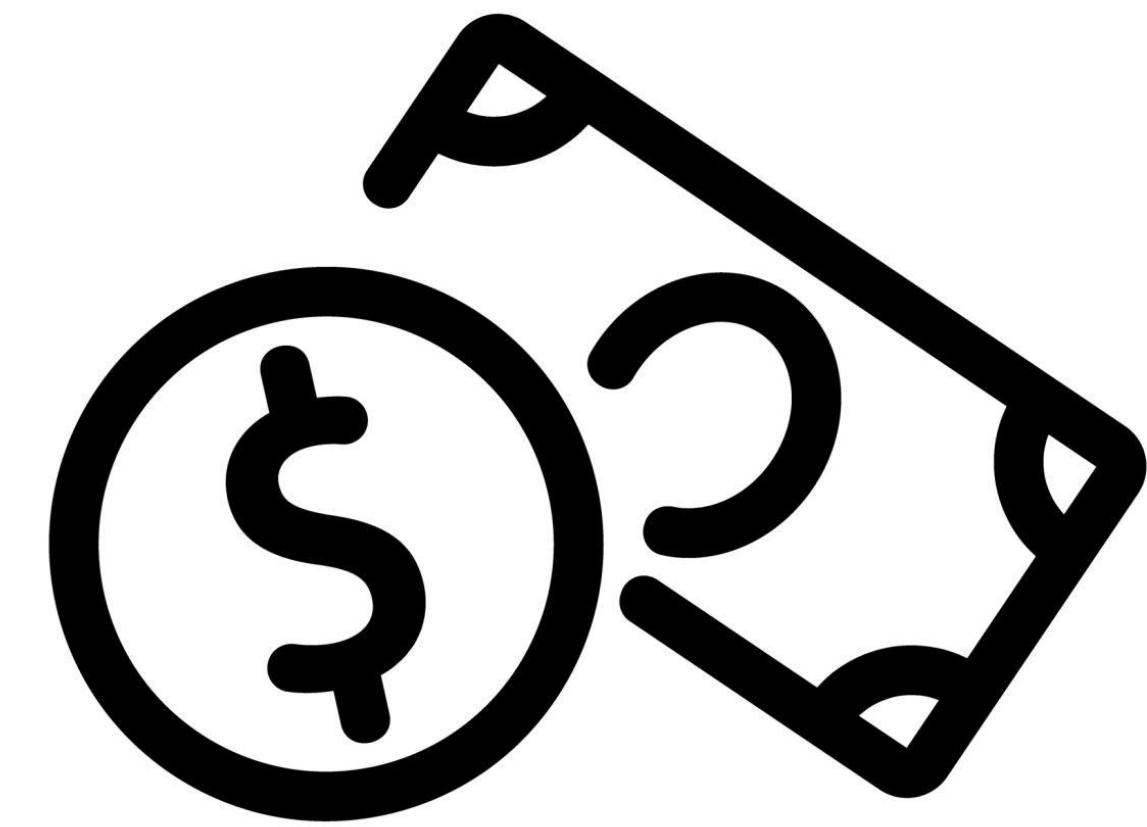
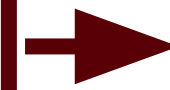
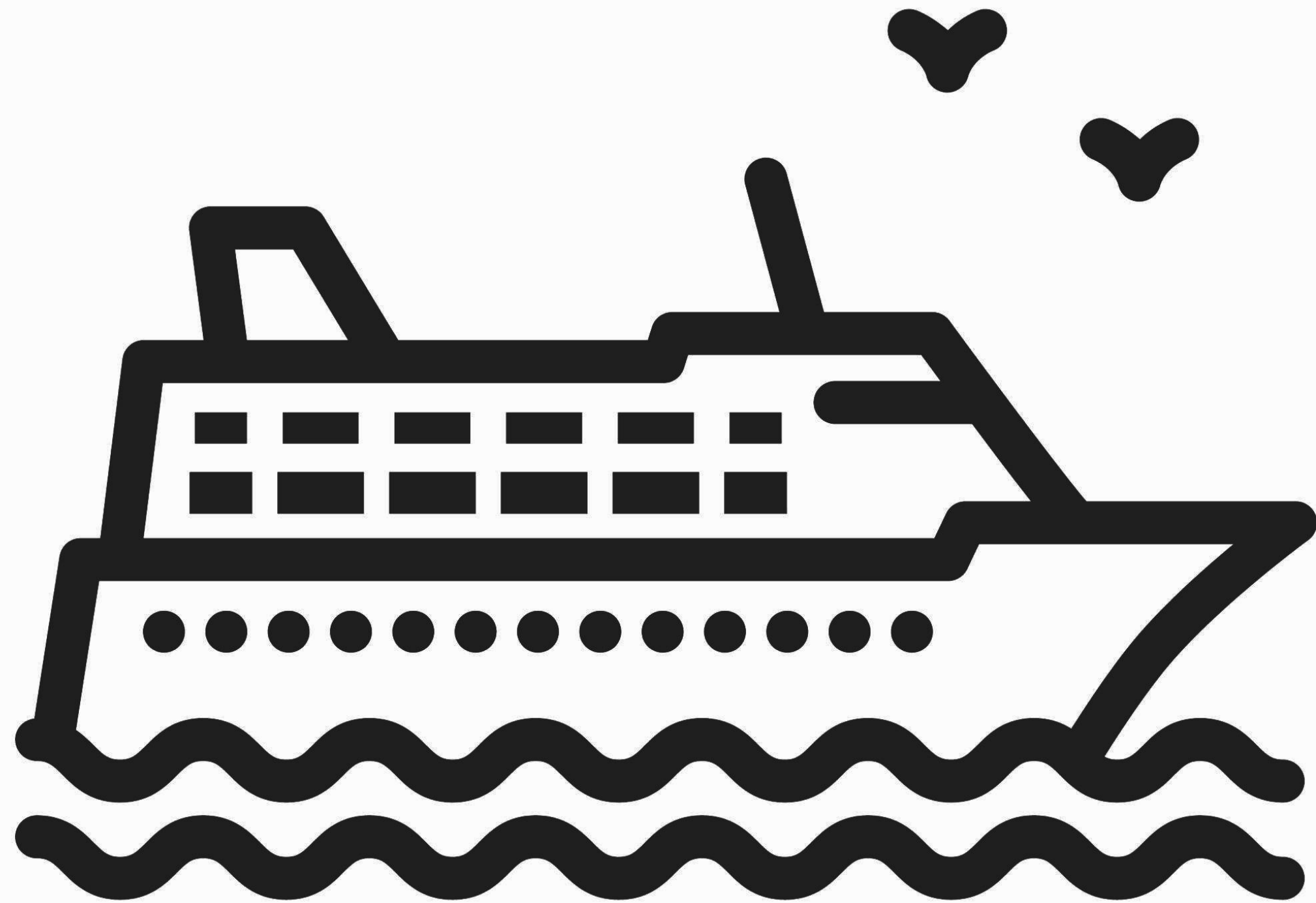


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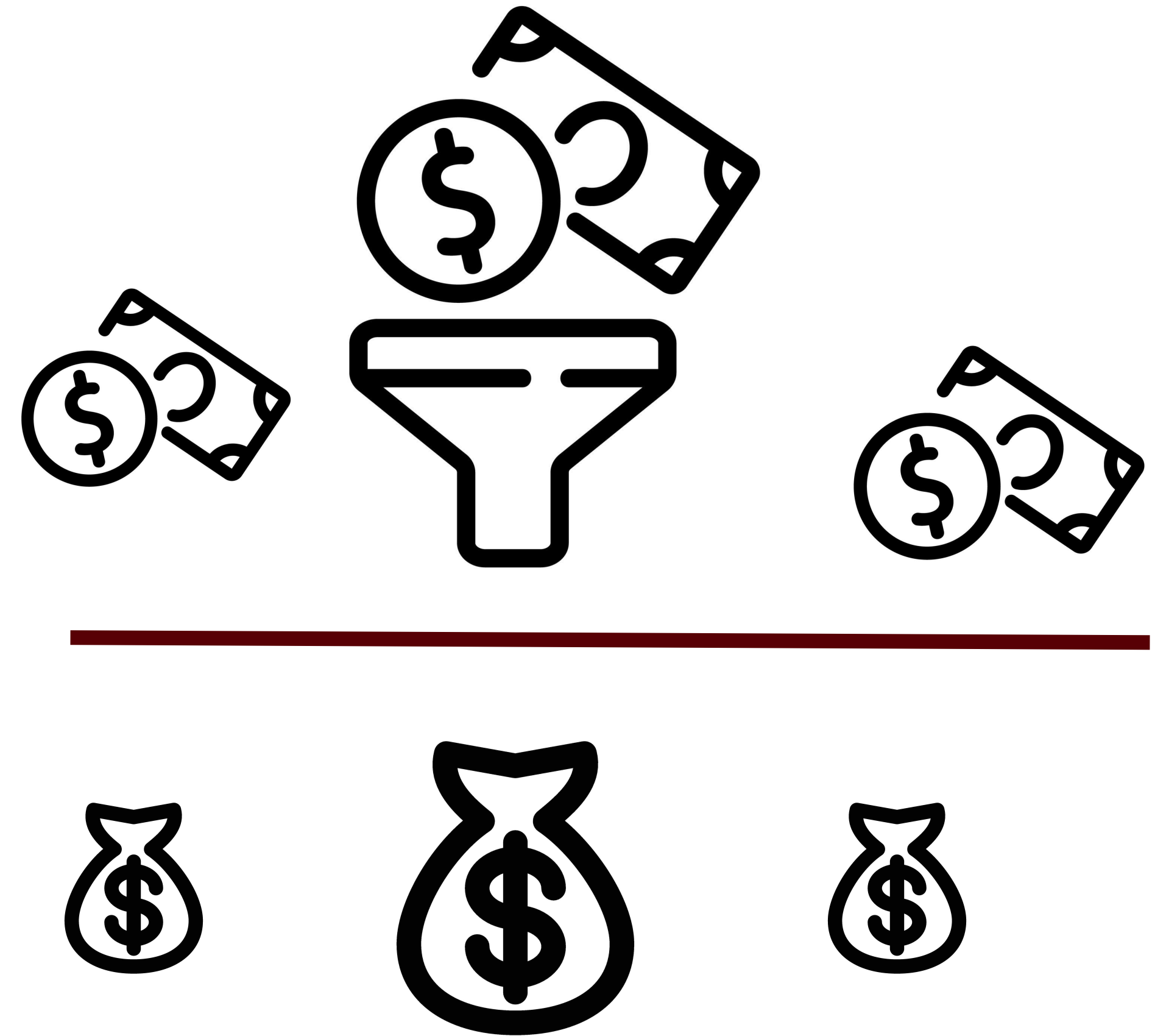
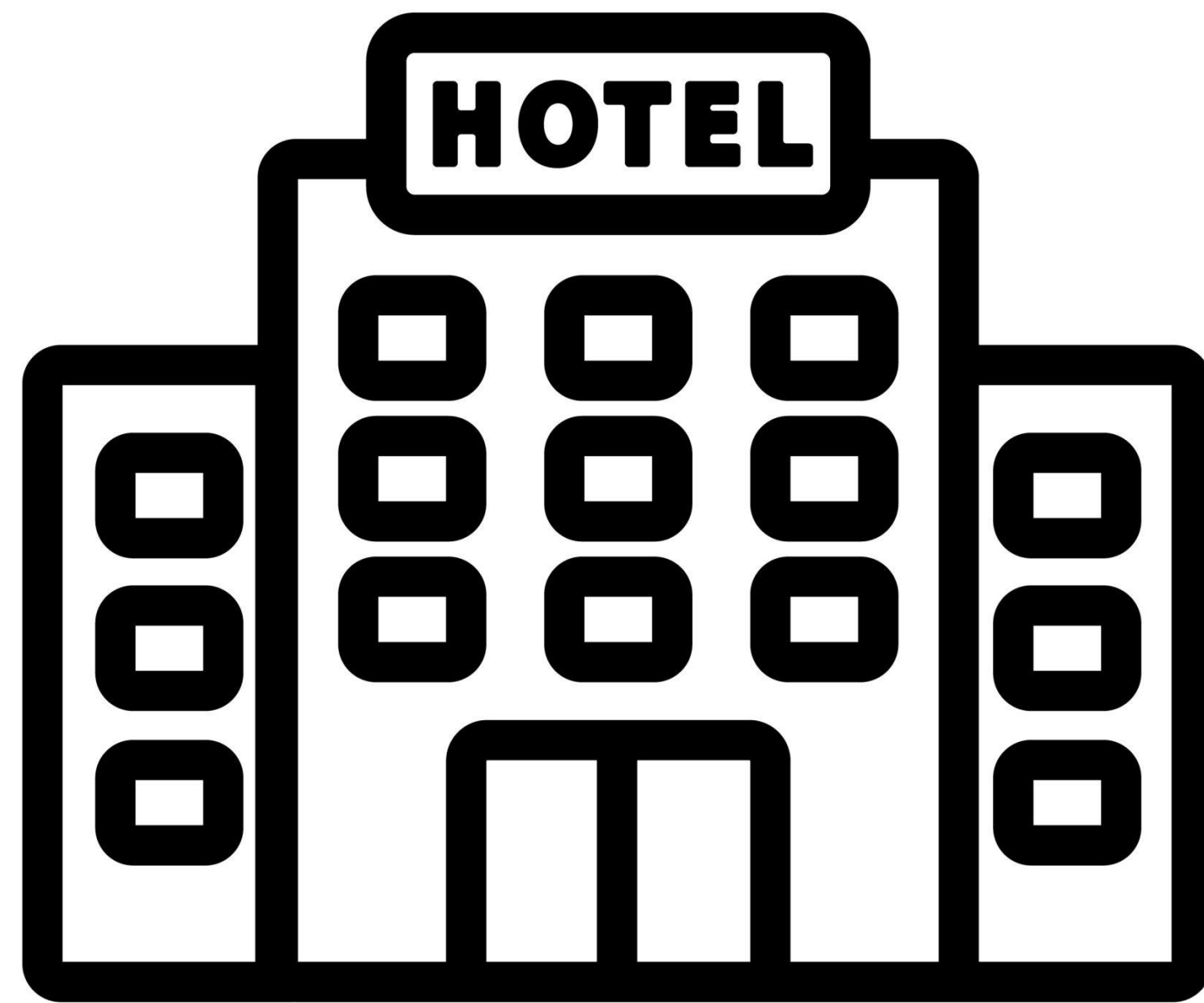
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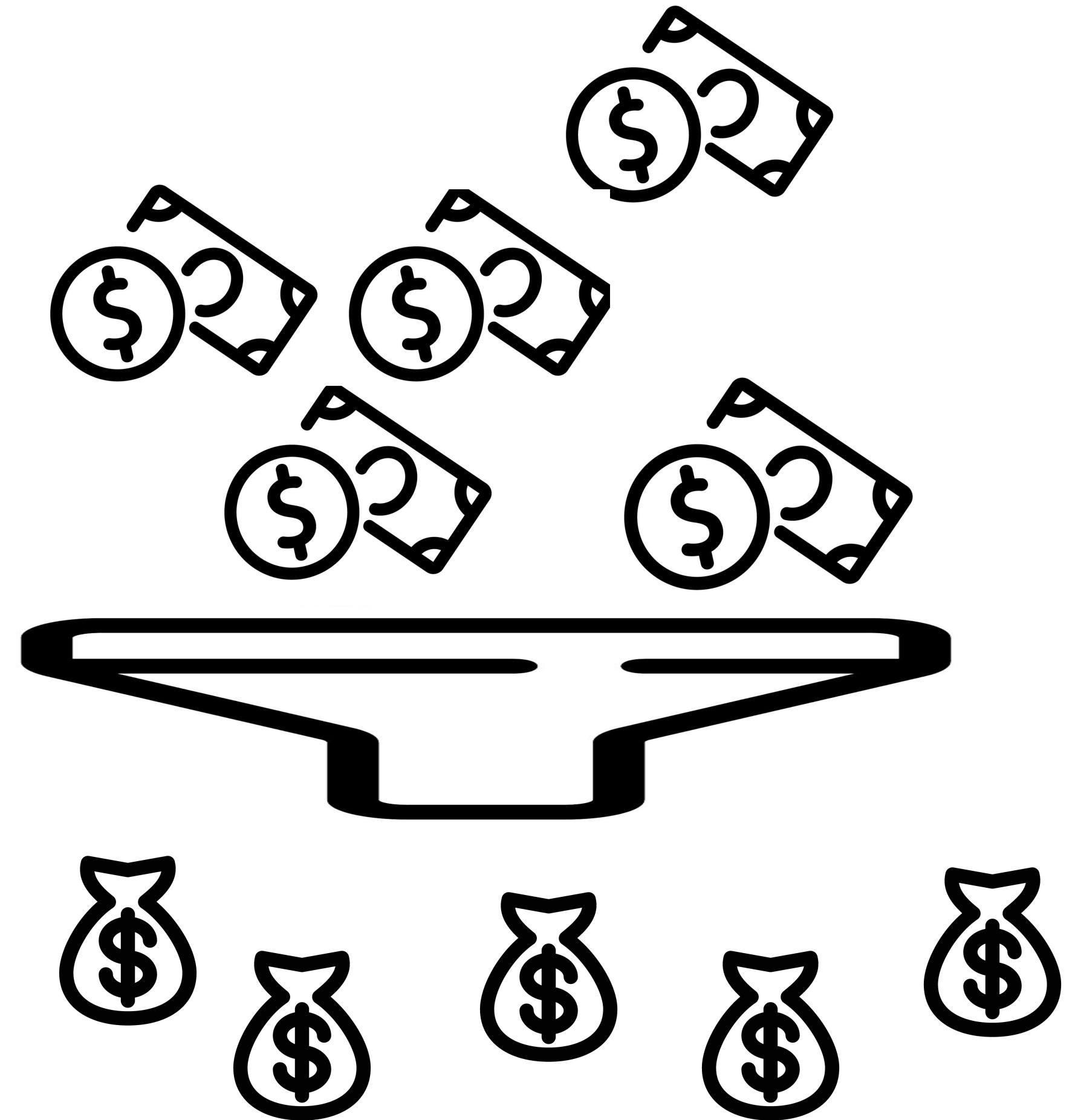
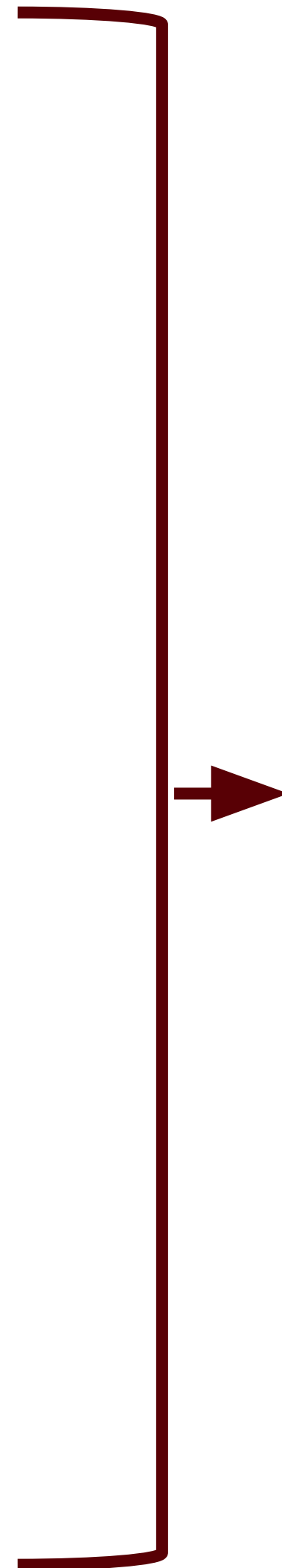
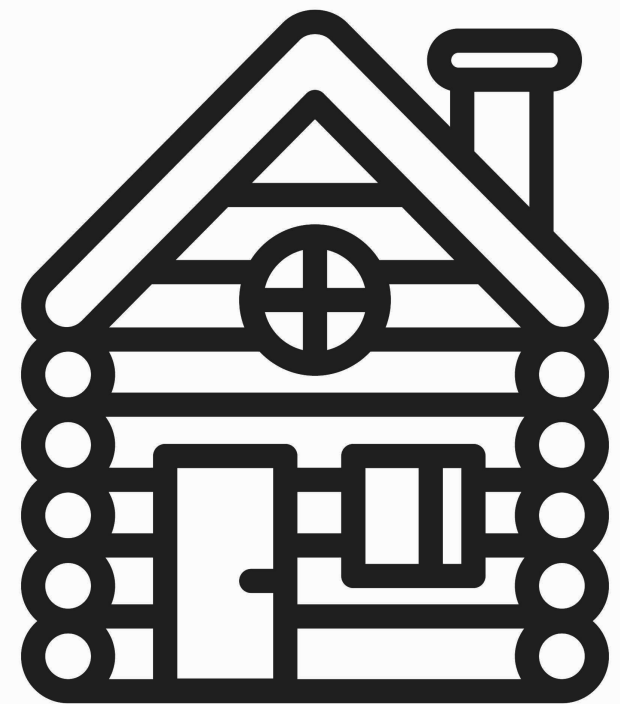
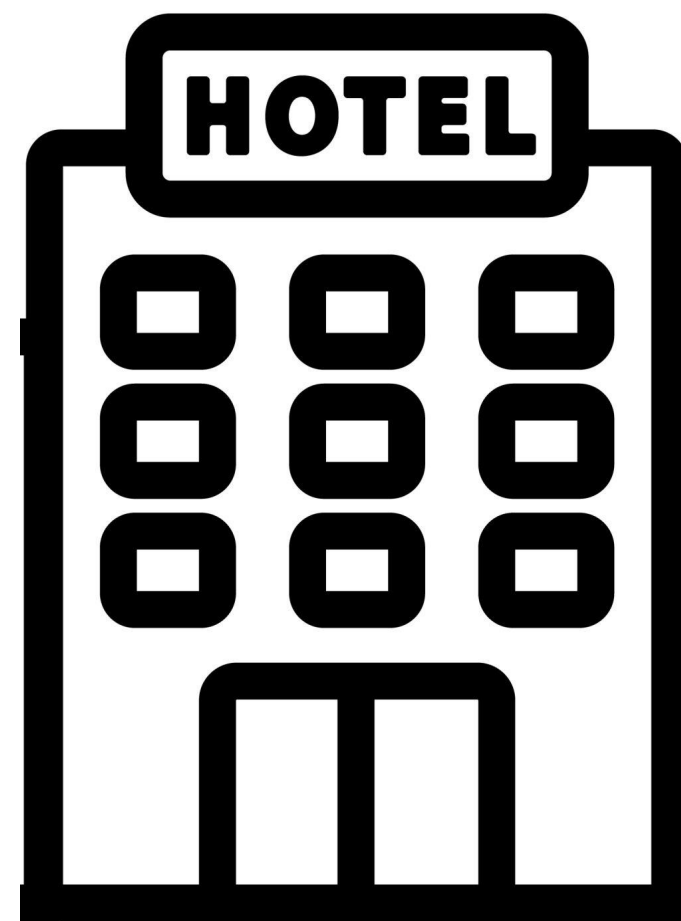
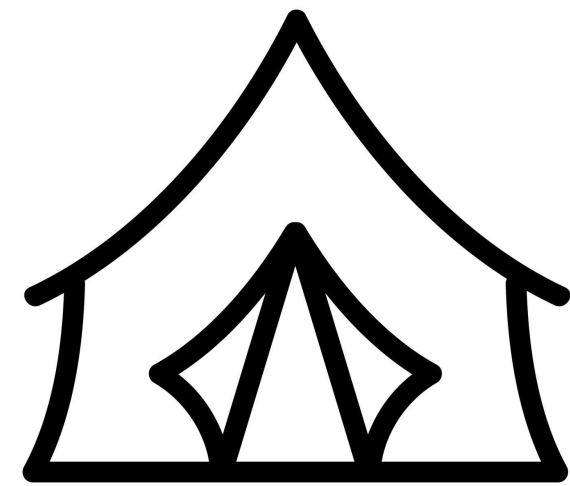
Cruise ship tourism economy



All-inclusive tourism economy *(land-based cruise ships)*



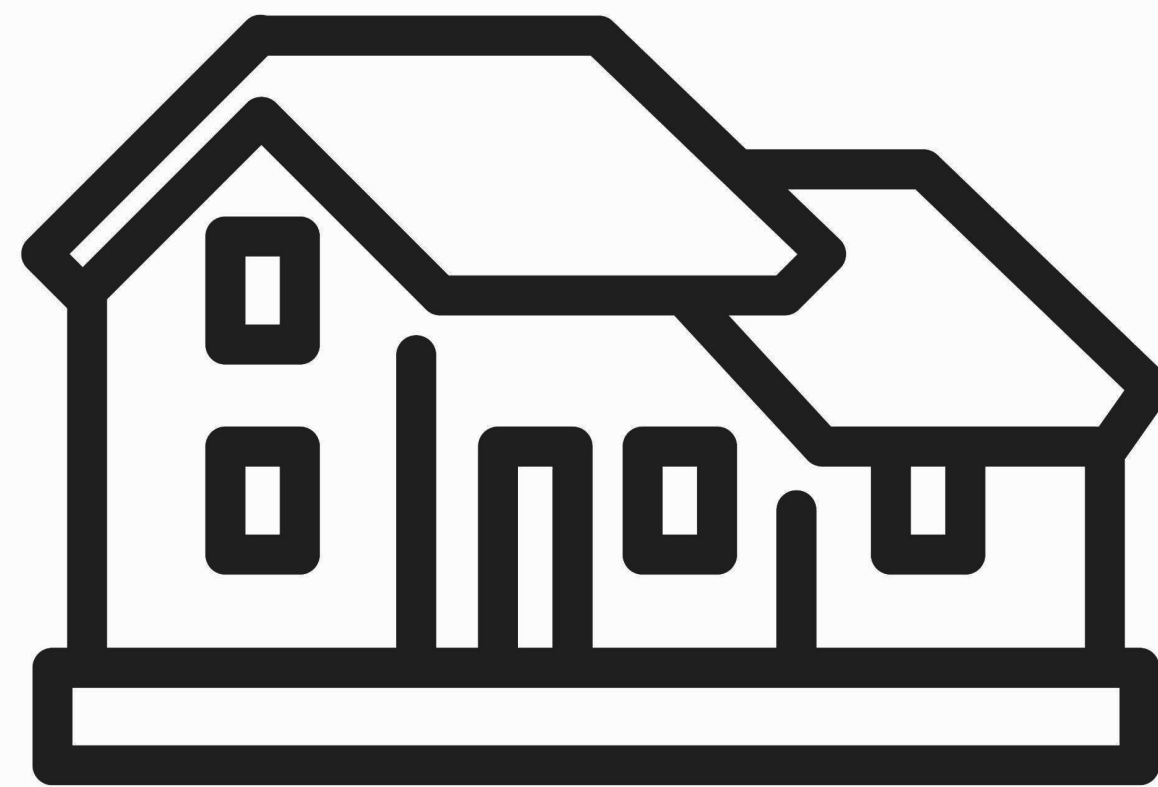
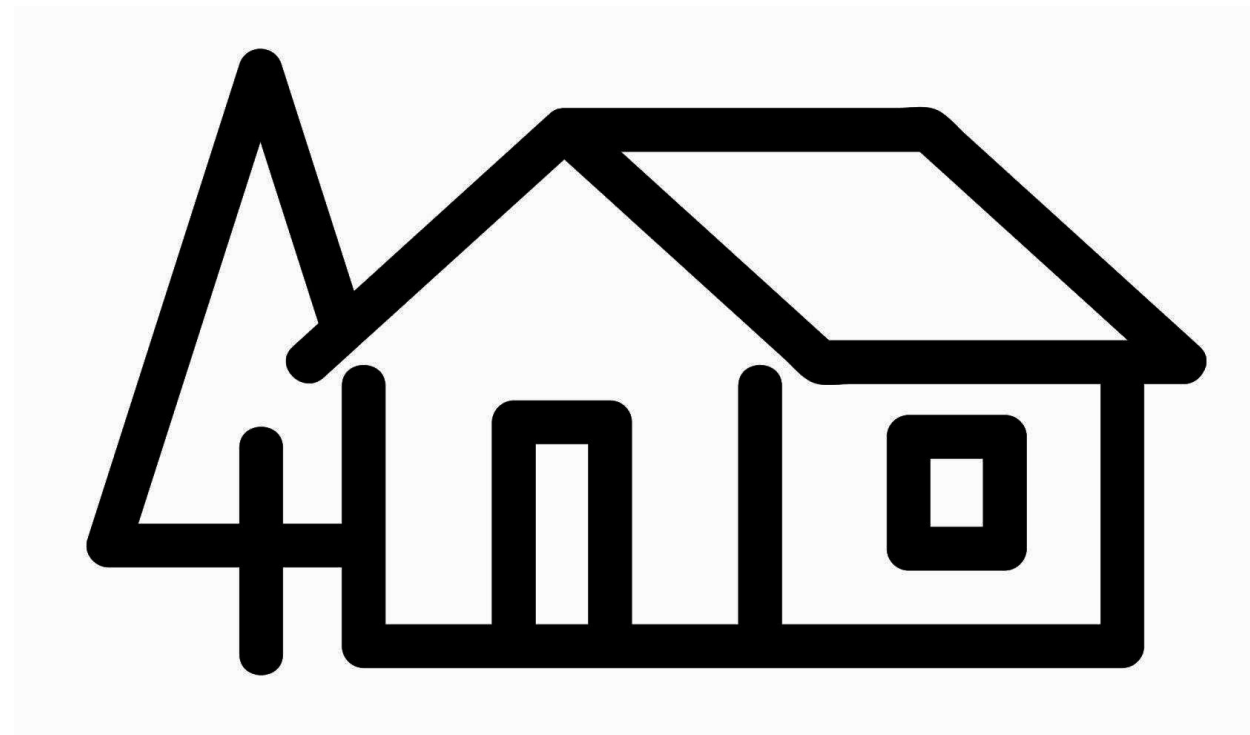
Distributed tourism economy





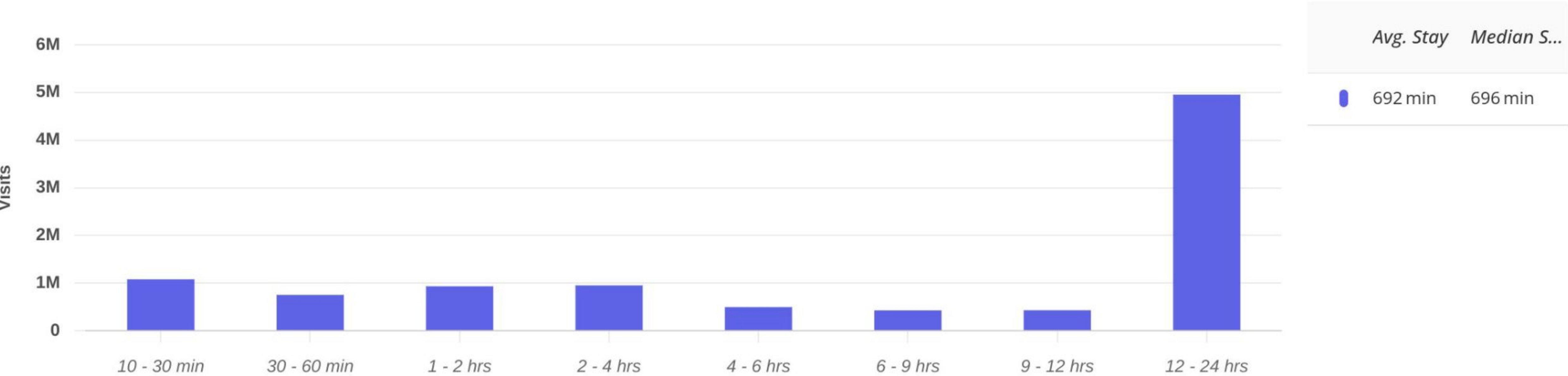
But wait, there's more!

- Seasonal homes and guest rooms house additional visitors to the community.



Daily Time Spent In Market

Crow Wing
County • Minnesota



Visits | Jan 1st, 2024 - Dec 31st, 2024
Data provided by Placer Labs Inc. (www.placer.ai)



Key observations

Visitors from greater than 50 miles away spend significantly more time in Crow Wing County during their visit.

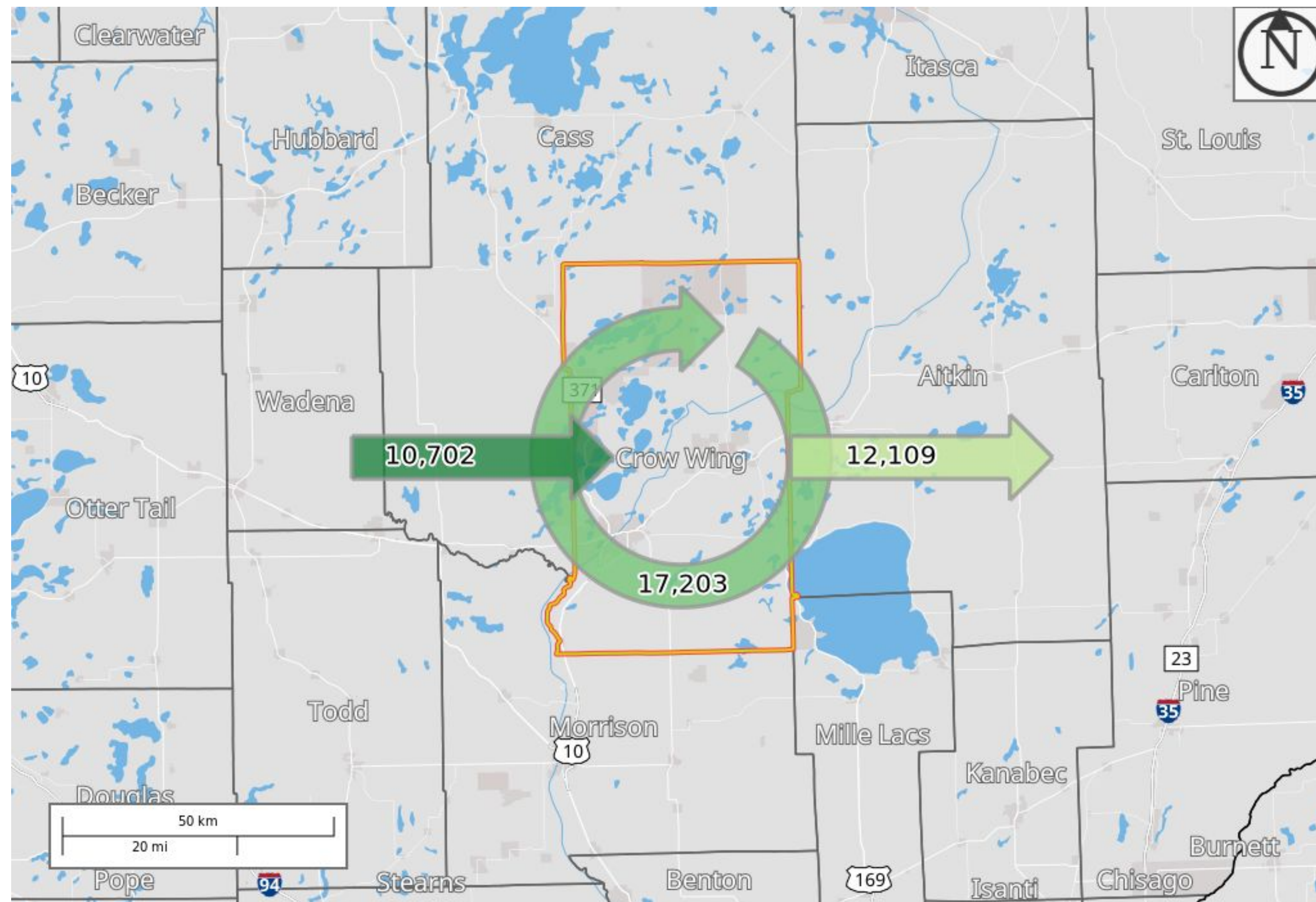
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Workforce movement in Crow Wing County

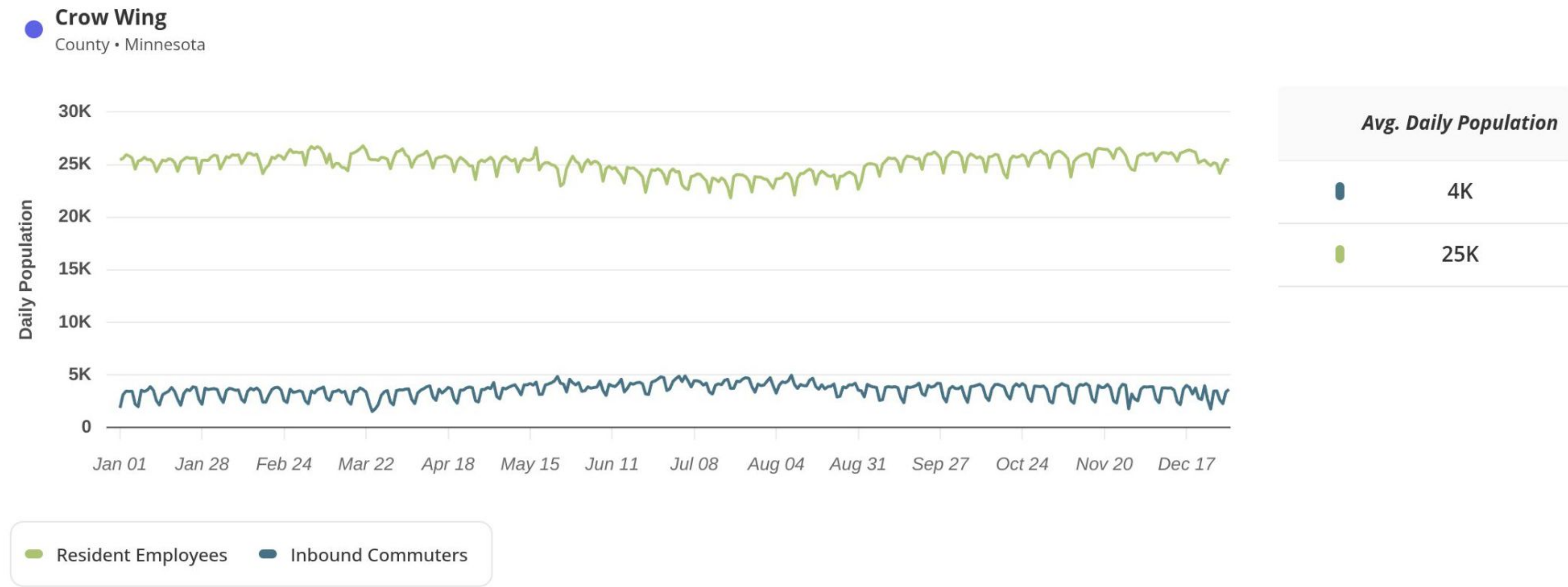
- 10,702 people community into Crow Wing County daily.
- 17,203 live and work in the county.
- 12,109 county residents work outside of the county.

Source: 2022 US Census



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Daily Population Trend



Daily | Visits | Jan 1st, 2024 - Dec 31st, 2024
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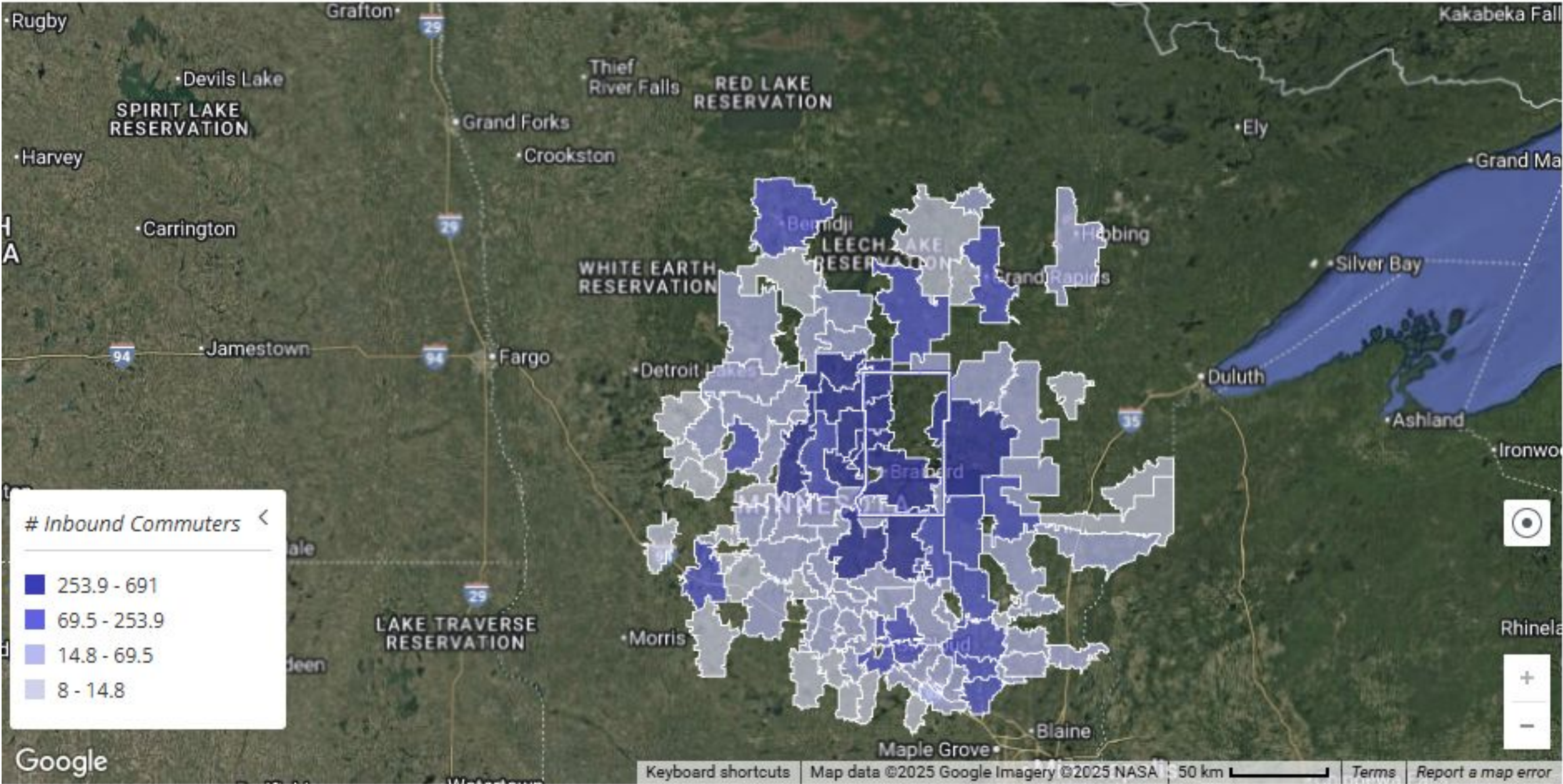
Key observations



- Highest employee count found midweek overall.
- Summer season has a dip in resident workers and increase in weekend and midweek worker counts for inbound commuters.
- Numbers are for daily counts and may differ slightly from Census data, which is an annual count.

Crow Wing
County • Minnesota

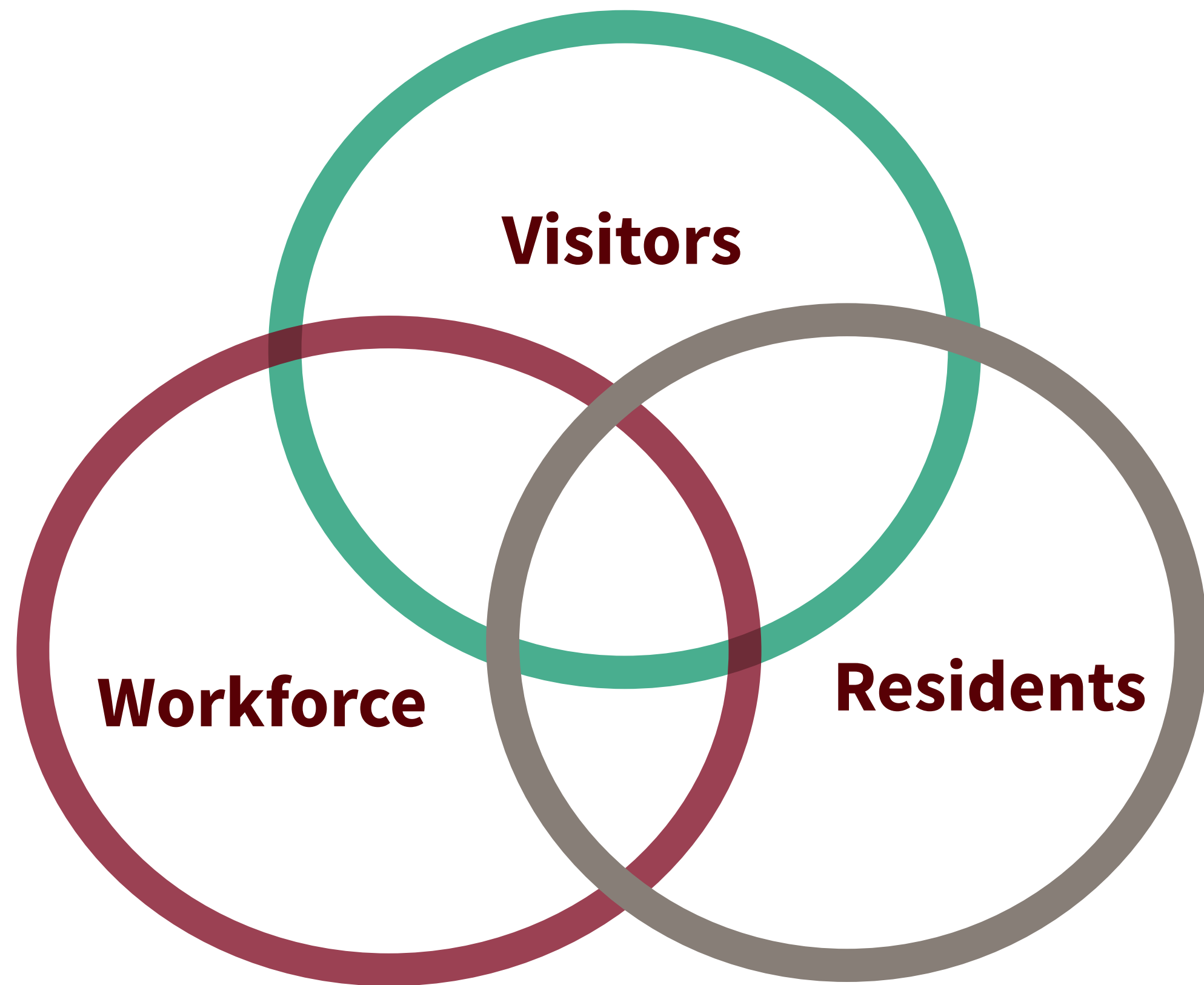
- Commuters come from a wide area.
- Highest inbound commuter numbers coming from adjoining areas on East and West.
- Counts include part-time and full-time employees.
- Remote workers not included.



Inbound Commuters | Jan 1st, 2024 - Dec 31st, 2024
Data provided by Placer Labs Inc. (www.placer.ai)



Questions & Takeaways



- What stands out to you?
- Does this reflect your experience?
- What is missing?



Key points about highly seasonal economies

- Individual connections to communities change over their lifetimes.
- Seasonal businesses are connected to the broader economy.
- Successful community development builds on deeper context.
- Community development efforts must reflect seasonal dynamics for sustainability.



Thank you!

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