EXPLORE MINNESOTA

2019 Traveler Profile

Research Report

March 2020

insights
Strategic Marketing and Research

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Background & objectives

- As the state's tourism promotion office, Explore Minnesota (EMT) periodically conducts visitor profile studies, to help communicate the impacts of its leisure travel marketing to key stakeholders, including residents, tourism businesses and organizations, and government.
- To that end, EMT has partnered with Strategic Marketing & Research Insights, LLC, (SMARInsights) to study travelers who visit the state, to help inform the organization's future marketing strategies, and improve the effectiveness of its efforts to attract more visitors. EMT will use the data and analysis from this study to craft its media mix, timing, messaging, and content.
- Objectives of the Traveler Profile are to gather information from Minnesota visitors and potential visitors to better understand:

Methodology

- SMARInsights used mobile location data to determine markets to survey in each seasonal wave of data collection.
- We then surveyed consumers – screening them to ensure they are leisure travelers, travel decision-makers for their households, and at least 21 years old – and asked about their Minnesota visitation. A total of 1,953 domestic visitors were surveyed, with 882 in-state and the remainder coming from out of state. From these visitors, data was gathered on more than 4,000 Minnesota visits that took place in 2019.
- In this year-end summary, overall visitor data is weighted by seasonal distribution.
- Surveying was also conducted in Canada with a focus on the western Ontario and southern Manitoba regions. Because data suggest that Canadian visitors represent a small share of overall visitors (0.75%), these visitors are addressed in a separate section of this report.
- Additionally, surveys were conducted with 1,161 potential visitors – consumers who have not visited Minnesota but who have some level of interest.
- The current report represents an update of previously published interim seasonal reports (winter, spring-summer, and fall). Revised data presented in those reports is incorporated here.

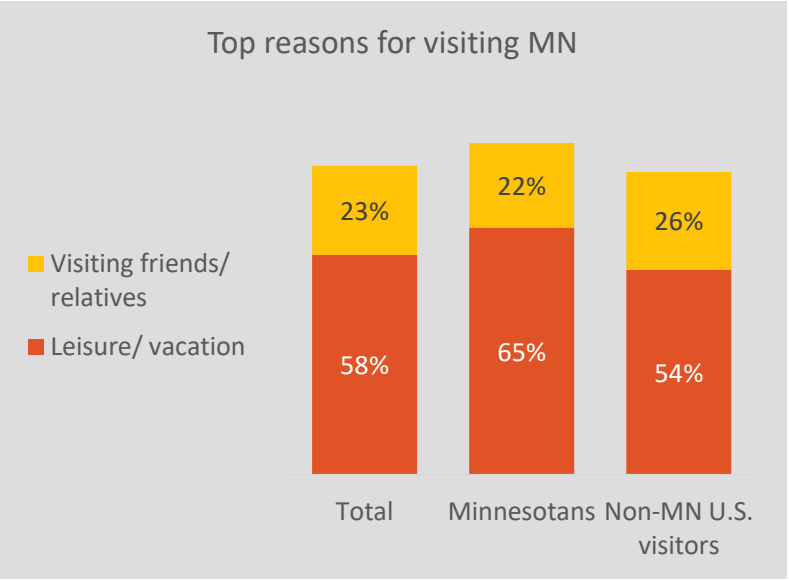
Surveys with 2019 domestic visitors	
Minnesotans	882
Non-MN U.S. visitors	1,071
Total visitor surveys	**1,953**
Total trips	4,143

Domestic seasonal trip distribution	
Winter	21%
Spring-Summer	46%
Fall	33%

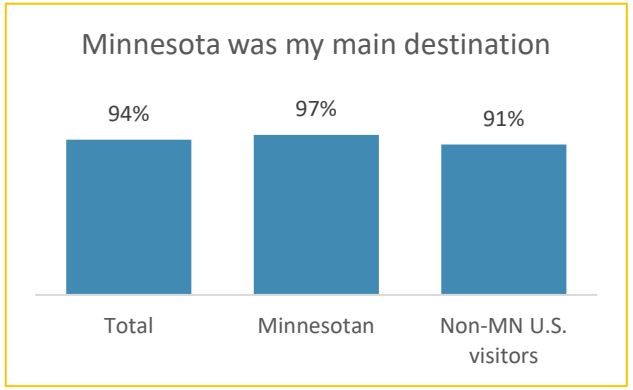
Domestic traveler profile

This section focuses on U.S. residents who traveled in Minnesota. Canadian visitors are profiled in a later section.

2019 Minnesota visitors – highlights



Average overnight visitor spent 2.8 nights in Minnesota



Activities on trip	Total	Minnesotan	Non-MN U.S. visitors
Dining at unique locally owned restaurants	55%	54%	57%
Shopping	51%	42%	59%
Friends or relatives	43%	40%	46%
Sightseeing	36%	36%	37%
Scenic drives	34%	38%	31%
Mall of America	29%	17%	41%
State/national parks	24%	28%	20%
Fairs/festivals/events	22%	20%	25%
Driving on designated scenic byways	20%	24%	16%
Hiking/backpacking	19%	23%	15%

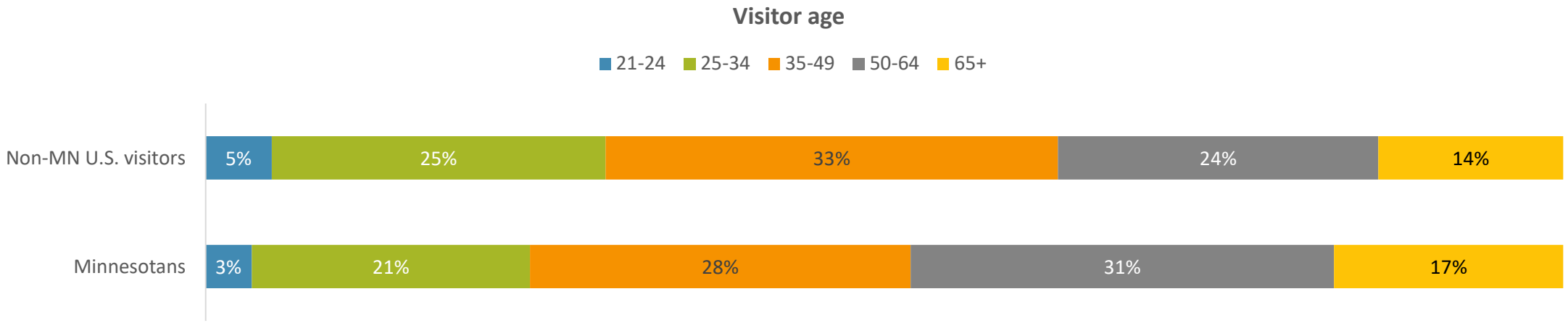
Average spending in Minnesota: $611/travel party

Average travel party: 3.0 people

Top motivators	Total	Minnesotan	Non-MN U.S. visitors
Friends or relatives	36%	36%	37%
Mall of America	21%	17%	26%
Shopping	19%	17%	21%
Dining at unique locally owned restaurants	18%	18%	18%
Scenic drives	12%	14%	10%

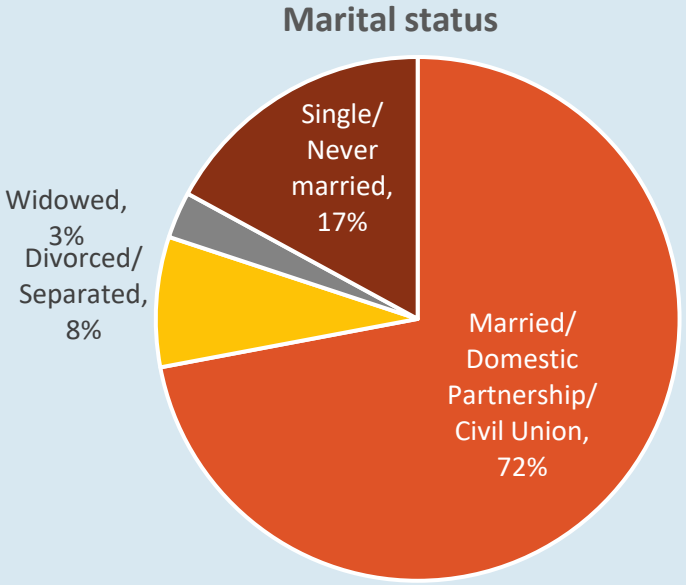
Demographic profile of Minnesota visitors

- In-state visitors are generally older than out-of-state visitors.
- Winter travelers tend to be older than spring-summer and fall visitors.



	Total				Minnesotans				Non-MN U.S. visitors			
	Total	Winter	Spring-Summer	Fall	Total	Winter	Spring-Summer	Fall	Total	Winter	Spring-Summer	Fall
21-24	4%	4%	4%	5%	3%	4%	4%	3%	5%	5%	4%	6%
25-34	23%	21%	24%	23%	21%	16%	23%	20%	25%	25%	24%	25%
35-49	31%	29%	31%	32%	28%	29%	28%	28%	33%	29%	34%	35%
50-64	27%	25%	28%	28%	31%	27%	32%	33%	24%	23%	24%	23%
65+	15%	21%	14%	13%	17%	25%	14%	16%	14%	18%	14%	11%

Demographic profile of Minnesota visitors



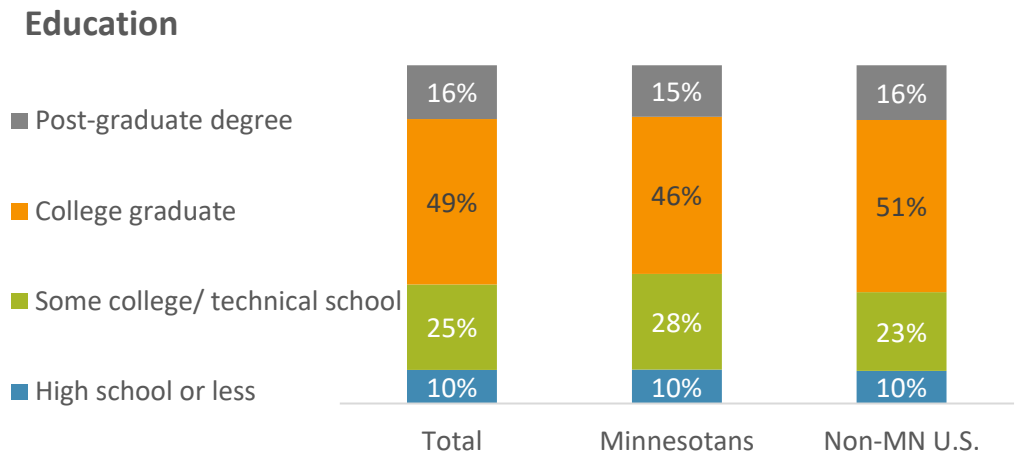
	Total	Winter	Spring-Summer	Fall
Married/Domestic Partnership/Civil Union	72%	68%	75%	70%
Divorced/Separated	8%	9%	6%	10%
Widowed	3%	5%	2%	2%
Single/Never married	17%	18%	16%	18%

- In terms of household makeup, marital status does not differ by visitor origin. Most are married. About 2 in 10 are single/never married.

Kids in HH	Total	Winter	Spring-Summer	Fall
Minnesotans	35%	39%	34%	35%
Non-MN U.S. visitors	47%	52%	48%	43%
TOTAL	41%	46%	41%	39%

- Among Minnesotans, a third have kids under age 18 at home, which is consistent with the general U.S. population.
- Out-of-state visitors are more likely to have kids in their household, which indicates that Minnesota has more of a family appeal.

Demographic profile of Minnesota visitors



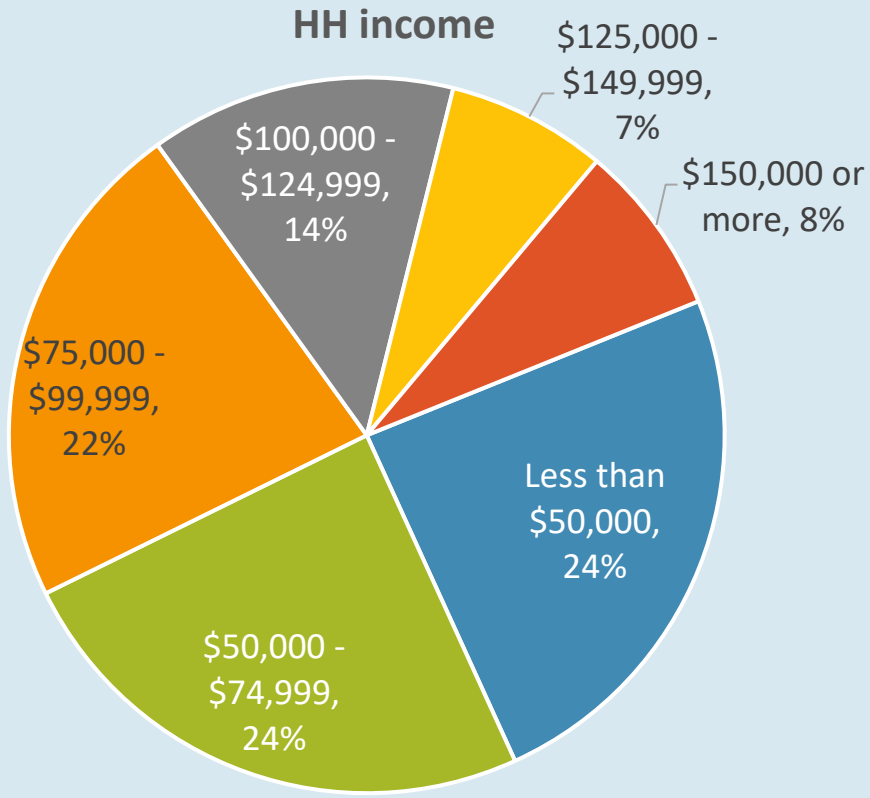
- Minnesota visitors are well educated; more than half have a college degree or more.
- Out-of-state visitors are more likely than in-state to have a degree.

	TOTAL				Minnesotans				Non-MN U.S. visitors			
	2019	Winter	Spring-Summer	Fall	Total	Winter	Spring-Summer	Fall	Total	Winter	Spring-Summer	Fall
Post-graduate degree	16%	11%	9%	11%	15%	19%	15%	13%	16%	19%	16%	14%
College graduate	49%	26%	26%	25%	46%	40%	49%	46%	51%	46%	49%	56%
Some college/technical school	25%	43%	49%	51%	28%	30%	28%	28%	23%	24%	24%	22%
High school or less	10%	19%	16%	13%	10%	11%	7%	13%	10%	11%	10%	8%

Demographic profile of Minnesota visitors

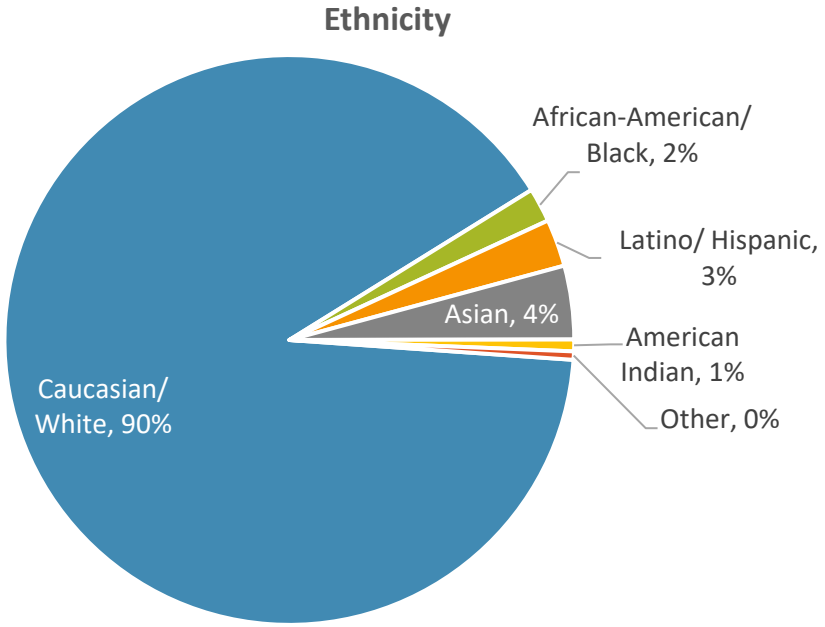
	TOTAL				Minnesotans				Non-MN U.S. visitors			
	2019	Winter	Spring-Summer	Fall	2019	Winter	Spring-Summer	Fall	2019	Winter	Spring-Summer	Fall
Less than $50,000	24%	27%	23%	25%	25%	28%	23%	27%	23%	26%	23%	22%
$50,000 - $74,999	24%	24%	24%	25%	23%	23%	23%	23%	26%	25%	25%	27%
$75,000 - $99,999	22%	18%	25%	21%	24%	19%	28%	21%	21%	18%	23%	20%
$100,000 - $124,999	14%	14%	13%	15%	12%	11%	13%	12%	15%	16%	14%	17%
$125,000 - $149,999	7%	8%	6%	8%	7%	8%	6%	8%	7%	8%	6%	8%
$150,000 or more	8%	9%	8%	7%	8%	10%	8%	8%	7%	7%	8%	6%

- Half of visitors have a household income of $75K or more.



Demographic profile of Minnesota visitors

- In terms of ethnicity, 9 in 10 visitors identify as Caucasian.
- Out-of-state visitors are somewhat more ethnically diverse.



	TOTAL				Minnesotans				Non-MN U.S. visitors			
	2019	Winter	Spring-Summer	Fall	2019	Winter	Spring-Summer	Fall	2019	Winter	Spring-Summer	Fall
Caucasian/White	90%	91%	90%	91%	92%	92%	91%	92%	89%	89%	89%	90%
African-American/Black	2%	2%	2%	2%	1%	1%	1%	2%	2%	3%	2%	2%
Latino/Hispanic	3%	3%	3%	2%	2%	1%	2%	2%	3%	4%	4%	2%
Asian	4%	3%	4%	4%	4%	3%	5%	4%	4%	3%	4%	4%
American Indian	1%	1%	0%	1%	0%	1%	0%	1%	1%	1%	1%	1%
Other	0%	1%	0%	0%	0%	1%	0%	0%	1%	0%	1%	0%

Visitor origins

MN visitation as share of total	2019	Winter	Spring-Summer	Fall
MN	48%	45%	49%	48%

Share of out-of-state visitors	2019	Winter	Spring-Summer	Fall
WI	19%	27%	16%	18%
IA	11%	15%	9%	11%
IL	9%	16%	8%	7%
ND	9%	12%	8%	9%
SD	5%	6%	4%	7%
TX	3%	0%	5%	3%
FL	3%	0%	5%	3%
MO	3%	2%	3%	3%
CA	2%	0%	3%	3%
NE	3%	2%	3%	3%
MI	2%	0%	3%	3%
IN	2%	0%	2%	2%
OH	2%	0%	2%	2%
CO	2%	0%	2%	2%
NY	2%	0%	2%	2%

- In total, nearly half of visits came from in-state.
- Of other states that produced a high share of 2019 visits to Minnesota, Wisconsin leads.
- There are some seasonal skews, with Wisconsin and Iowa producing more of the winter and fall trips, and Illinois and South Dakota producing a higher share of winter than other seasonal trips.

Visitor origins

- Looking at visitor origin by city area, the Minneapolis-St. Paul DMA produces the lion's share of in-state visits, which makes sense since this is a large population center. There is little seasonal variation among in-state travelers.
- Out-of-state, Fargo is the DMA that produces the most trips to Minnesota. Other top non-Minnesota DMAs represent eight states, including four Wisconsin DMAs and three Iowa DMAs.

Visitors by DMA		2019	Winter	Spring-Summer	Fall
In-state	Minneapolis-St. Paul, MN	83%	81%	83%	85%
	Duluth, MN-Superior, WI	8%	8%	8%	7%
	Rochester, MN Mason City, IA Austin, MN	6%	10%	6%	5%
	Mankato, MN	3%	2%	3%	3%
Non-MN U.S.	Fargo-Valley City, ND	12%	10%	10%	17%
	Sioux Falls (Mitchell), SD	6%	4%	5%	8%
	La Crosse-Eau Claire, WI	5%	6%	4%	6%
	Chicago, IL	6%	11%	4%	5%
	Des Moines-Ames, IA	3%	5%	3%	3%
	Minot-Bismarck- Dickinson (Williston), ND	3%	3%	3%	3%
	Milwaukee, WI	4%	5%	3%	3%
	Sioux City, IA	1%	3%		2%
	Omaha, NE	2%	1%	2%	2%
	Cedar Rapids-Waterloo-Iowa City & Dubuque, IA	2%	3%	2%	2%
	Denver, CO	2%	0%	2%	2%
	Madison, WI	3%	4%	2%	2%
	New York, NY	2%	0%	2%	2%
	Green Bay-Appleton, WI	2%	3%	2%	2%

Trip specifics

	TOTAL				Minnesotan				Non-MN U.S. visitors			
	2019	Winter	Spring-Summer	Fall	2019	Winter	Spring-Summer	Fall	2019	Winter	Spring-Summer	Fall
Minnesota was my main destination	94%	95%	93%	94%	97%	95%	97%	96%	91%	94%	89%	92%
I was ultimately headed somewhere else, but included a visit to Minnesota	4%	4%	4%	3%	2%	3%	2%	2%	5%	4%	6%	4%
Minnesota was one of several places I decided to visit on this trip	3%	2%	3%	3%	1%	1%	1%	2%	4%	2%	5%	5%

- Proximity clearly plays a role in the selection of Minnesota as a destination, as the higher-volume visitor origins are generally those that are closer.
- This is reinforced by the 92% of visitors who report that Minnesota was their main destination.

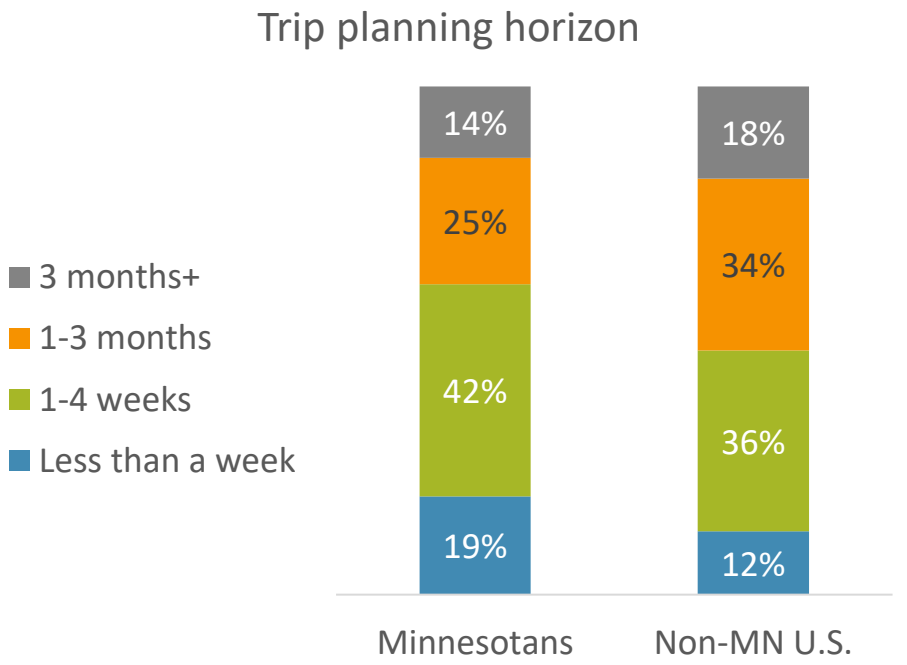
Trip specifics

- More than half of Minnesota visits are for leisure/vacation, with nearly a quarter of trips to visit friends and family.
- The blip in out-of-state fall trips was for sports.

	TOTAL				Minnesotans				Non-MN U.S. visitors			
	2019	Winter	Spring-Summer	Fall	2019	Winter	Spring-Summer	Fall	2019	Winter	Spring-Summer	Fall
Leisure/vacation	59%	58%	63%	55%	65%	64%	68%	63%	54%	54%	59%	48%
Visiting friends/relatives	24%	27%	23%	24%	22%	25%	21%	22%	26%	28%	25%	26%
Wedding or other special event	6%	6%	6%	5%	4%	5%	4%	4%	7%	8%	8%	6%
Business/work	3%	3%	3%	3%	3%	3%	3%	3%	3%	4%	3%	3%
Other	6%	3%	4%	12%	5%	2%	3%	8%	8%	4%	4%	15%
Conference/convention	1%	2%	1%	1%	1%	2%	1%	0%	2%	2%	2%	1%

Trip specifics

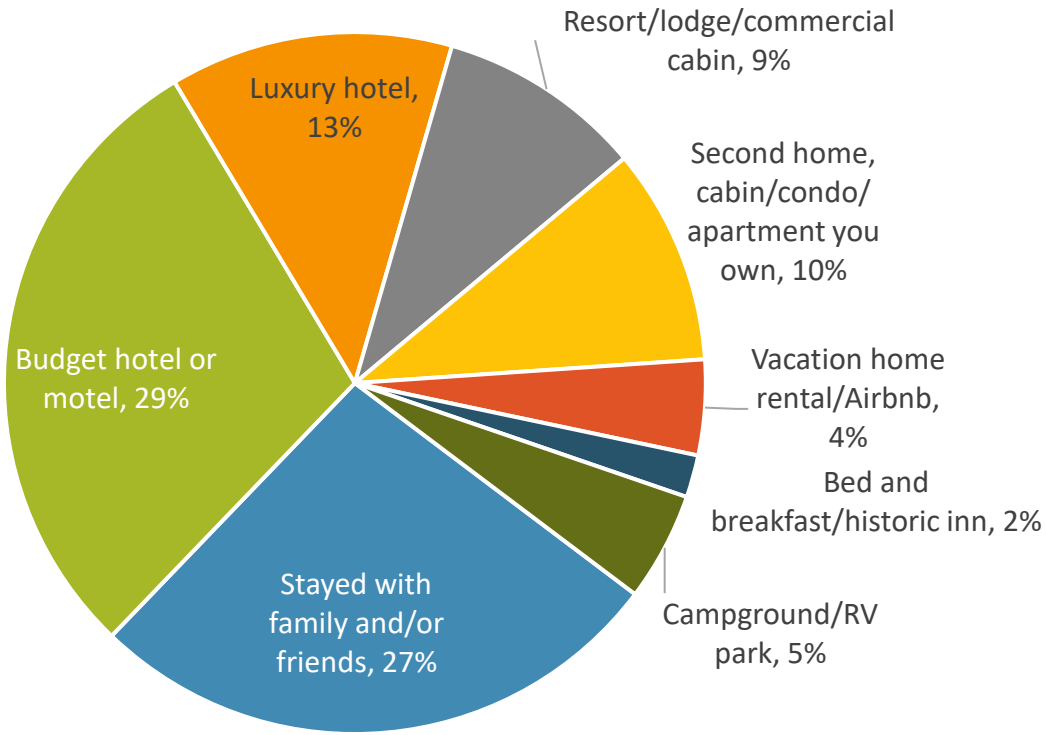
- Out-of-state visitors take longer to plan their Minnesota trips than the in-state visitors.



	TOTAL			WINTER			SPRING-SUMMER			FALL		
	2019	Minnesotans	Non-MN U.S.	2019	Minnesotans	Non-MN U.S.	2019	Minnesotans	Non-MN U.S.	2019	Minnesotans	Non-MN U.S.
Less than a week	16%	19%	12%	17%	24%	12%	14%	18%	11%	16%	18%	15%
1-4 weeks	38%	42%	36%	46%	49%	44%	35%	38%	32%	38%	42%	35%
1-3 months	30%	25%	34%	22%	16%	27%	29%	26%	31%	36%	29%	42%
3 months+	16%	14%	18%	14%	11%	17%	22%	18%	26%	9%	10%	8%

Trip specifics

- Nearly equal shares of visitors use budget hotel/motel accommodations and stay with friends/family.
- There is a higher share of VFR in winter than in the other seasons, which is consistent with holiday travel.
- There is higher usage of 2nd homes in summer and fall.

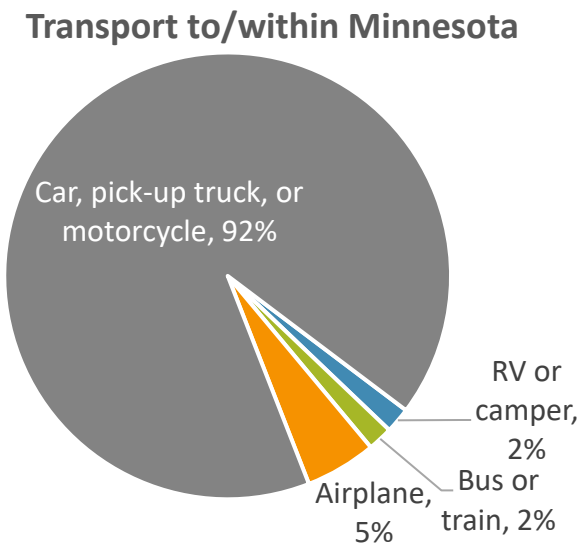


	TOTAL			WINTER			SPRING-SUMMER			FALL		
	2019	Minnesotans	Non-MN U.S.	2019	Minnesotans	Non-MN U.S.	2019	Minnesotans	Non-MN U.S.	2019	Minnesotans	Non-MN U.S.
Stayed with family and/or friends	27%	26%	28%	35%	36%	33%	23%	19%	27%	29%	30%	28%
Budget hotel or motel	29%	24%	35%	28%	27%	28%	30%	25%	35%	31%	22%	38%
Luxury hotel	13%	9%	17%	16%	12%	20%	12%	8%	16%	13%	10%	15%
Resort/lodge/commercial cabin	9%	11%	7%	9%	11%	7%	9%	11%	7%	9%	12%	7%
Second home, cabin/condo/ apartment you own	10%	15%	4%	5%	8%	1%	12%	20%	4%	9%	13%	5%
Vacation home rental/Airbnb	4%	4%	5%	4%	3%	5%	4%	4%	4%	5%	6%	4%
Bed and breakfast/historic inn	2%	2%	2%	3%	2%	3%	2%	3%	2%	2%	1%	2%
Campground/RV park	5%	7%	3%	1%	0%	1%	7%	10%	5%	4%	7%	1%

Trip specifics

- More than 9 in 10 Minnesota visits use a car, pickup truck, or motorcycle. There is little seasonal difference.

	TOTAL			WINTER			SPRING-SUMMER			FALL		
	2019	Minnesotans	Non-MN U.S.	2019	Minnesotans	Non-MN U.S.	2019	Minnesotans	Non-MN U.S.	2019	Minnesotans	Non-MN U.S.
RV or camper	2%	2%	1%	1%	1%	2%	2%	1%	2%	2%	3%	1%
Bus or train	2%	1%	2%	2%	1%	3%	2%	2%	2%	1%	1%	1%
Airplane	5%	3%	7%	4%	3%	6%	5%	2%	7%	6%	3%	8%
Car, pickup truck, or motorcycle	92%	92%	93%	94%	94%	94%	93%	93%	93%	91%	90%	92%

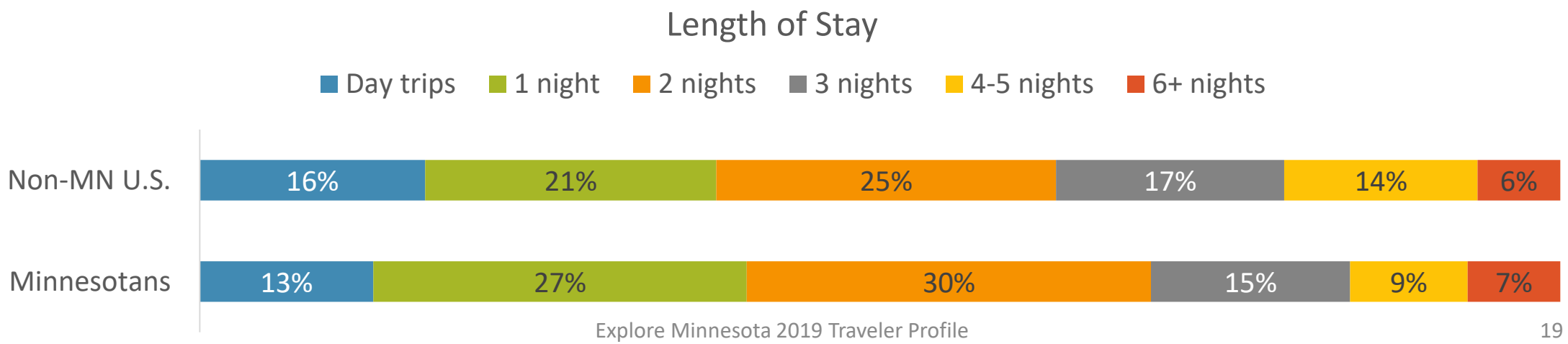


Trip specifics

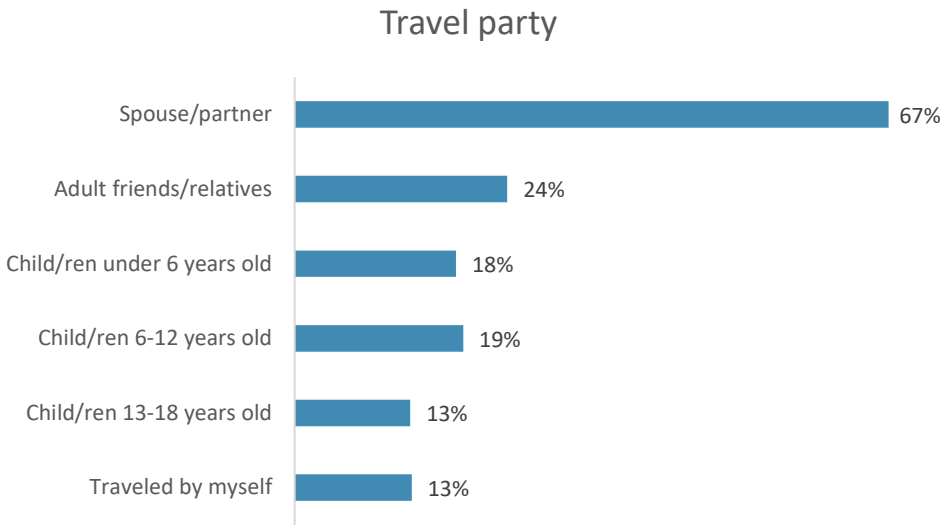
- Fewer than 1 in 5 Minnesota trips is a day trip.
- Roughly half of Minnesota trips are 1- or 2-night stays.
- Out-of-state visitors tend to stay longer.
- Summer trips tend to be longer.

	TOTAL			Winter			Spring-Summer			Fall		
	2019	MN	Non-MN U.S.	2019	MN	Non-MN U.S.	2019	MN	Non-MN U.S.	2019	MN	Non-MN U.S.
Day trips	15%	13%	16%	22%	21%	23%	10%	11%	10%	16%	10%	22%
1 night	24%	27%	21%	29%	38%	21%	22%	24%	20%	24%	26%	23%
2 nights	27%	30%	25%	21%	21%	21%	29%	33%	25%	29%	30%	27%
3 nights	16%	15%	17%	14%	11%	16%	18%	16%	19%	15%	15%	14%
4-5 nights	12%	9%	14%	12%	7%	16%	13%	9%	17%	9%	9%	9%
6+ nights	6%	7%	6%	3%	3%	4%	8%	7%	8%	7%	9%	5%

	2019		Winter		Spring-summer		Fall	
Overnight trips	Nights in MN	Nights on trip	Nights in MN	Nights on trip	Nights in MN	Nights on trip	Nights in MN	Nights on trip
Total	2.8	3.1	2.2	2.7	3.1	3.2	2.7	3.1
Minnesotans	2.6	2.8	1.9	2.0	2.7	2.9	2.8	3.2
Non-MN U.S.	2.8	3.3	2.5	2.7	3.1	3.7	2.5	3.1



Trip specifics



- Two-thirds of Minnesota travel parties include a spouse or partner.
- Travel parties hover right around 3 people, with some seasonal fluctuation.

	TOTAL			WINTER			SPRING-SUMMER			FALL		
	2019	Minneso-tans	Non-MN U.S.	2019	Minneso-tans	Non-MN U.S.	2019	Minneso-tans	Non-MN U.S.	2019	Minneso-tans	Non-MN U.S.
Traveled by myself	13%	13%	15%	13%	14%	12%	13%	14%	12%	16%	10%	22%
Child/ren 13-18 years old	13%	12%	13%	12%	9%	14%	15%	15%	15%	11%	11%	10%
Child/ren 6-12 years old	19%	18%	20%	22%	18%	24%	20%	18%	23%	15%	18%	12%
Child/ren under 6 years old	18%	16%	20%	18%	15%	21%	18%	15%	21%	17%	19%	16%
Adult friends/relatives	24%	22%	26%	26%	22%	30%	23%	21%	25%	23%	24%	22%
Spouse/partner	67%	69%	62%	64%	69%	60%	68%	68%	68%	63%	70%	58%

Trip specifics

Kids on trip	2019	WINTER	SPRING-SUMMER	FALL
Minnesotans	40%	41%	35%	47%
Non-MN U.S.	44%	41%	50%	39%
Total	42%	41%	42%	44%

- The 42% of travel parties with kids is higher than the national share of households with children and again underscores that family trips are important for Minnesota.

Trip activities – Minnesotans

- The top activities of most general leisure trips are eating, shopping, visiting, and looking at things.
- There are seasonal skews, with a higher share of winter trips including locally owned restaurants, theater, and casinos – all indoor activities with fairly broad appeal.

Minnesotan visitor activities	2019	Winter	Spring-Summer	Fall
Dining at unique locally owned restaurants (non-chain)	54%	71%	46%	53%
Shopping	42%	44%	38%	46%
Friends or relatives	40%	49%	33%	46%
Scenic drives	38%	27%	38%	45%
Sightseeing	36%	28%	36%	41%
State/national parks	28%	16%	30%	32%
Driving on designated scenic byways	24%	16%	25%	28%
Hiking/backpacking	23%	11%	25%	29%
Swimming	20%	13%	27%	14%
Fairs/festivals/events	20%	17%	19%	22%
Mall of America	17%	26%	14%	16%
Historical attractions	17%	12%	18%	18%
Casinos	17%	22%	14%	17%
Wineries/breweries/distilleries	16%	18%	13%	18%
Fishing	15%	10%	18%	15%
Wildlife/bird watching	15%	8%	14%	20%
Arts and cultural activities	14%	16%	12%	15%
Nightlife, concerts and entertainment	14%	19%	12%	12%
Camping	11%	3%	12%	15%
Health and wellness activities	11%	11%	12%	11%
Museums and galleries	10%	12%	9%	10%
Zoos	8%	8%	7%	8%
Professional sporting events	7%	7%	6%	7%
Paved trail/road biking	6%	3%	6%	8%
Amusement parks/carnivals	6%	5%	5%	7%
Theater performances	6%	11%	3%	6%
Water parks	5%	5%	6%	5%
Amateur sporting events/tournaments	5%	9%	3%	5%
Off-roading/ATV driving	3%	2%	3%	5%
Hunting	3%	3%	0%	7%
Mountain biking/fat biking	2%	1%	1%	2%

Trip activities – Non-MN U.S.

- Compared to in-state visitors, those from out-of-state are more likely to shop (59% of out-of-state trips versus just 42% for in-state), and a higher share of winter trips involve shopping.
- Mall of America is also part of more out-of-state trips (41%) than in-state (17%).

Non-MN U.S. visitor activities	2019	Winter	Spring-Summer	Fall
Shopping	59%	66%	58%	55%
Dining at unique locally owned restaurants (non-chain)	57%	73%	51%	54%
Friends or relatives	46%	52%	44%	45%
Mall of America	41%	45%	40%	40%
Sightseeing	37%	31%	39%	38%
Scenic drives	31%	23%	31%	34%
Fairs/festivals/events	25%	21%	24%	29%
Nightlife, concerts and entertainment	20%	23%	19%	19%
State/national parks	20%	12%	25%	18%
Swimming	17%	12%	22%	14%
Museums and galleries	16%	20%	16%	15%
Driving on designated scenic byways	16%	12%	18%	17%
Hiking/backpacking	15%	11%	17%	16%
Historical attractions	15%	14%	15%	16%
Arts and cultural activities	15%	17%	14%	15%
Fishing	15%	12%	19%	10%
Wineries/breweries/distilleries	14%	14%	12%	18%
Professional sporting events	13%	15%	14%	12%
Zoos	12%	12%	12%	12%
Casinos	12%	16%	10%	11%
Health and wellness activities	11%	13%	11%	10%
Wildlife/bird watching	11%	8%	10%	14%
Amusement parks/carnivals	11%	9%	12%	9%
Amateur sporting events/tournaments	9%	11%	8%	9%
Water parks	8%	9%	8%	7%
Camping	6%	5%	8%	5%
Theater performances	6%	10%	6%	5%
Paved trail/road biking	5%	5%	5%	5%
Mountain biking/fat biking	3%	3%	5%	2%
Hunting	3%	4%	2%	3%
Off-roading/ATV driving	3%	3%	2%	3%

Trip activities – Total

Minnesotan visitor activities	2019	Winter	Spring-Summer	Fall
Dining at unique locally owned restaurants	55%	73%	49%	53%
Shopping	51%	56%	48%	50%
Friends or relatives	43%	51%	39%	45%
Sightseeing	36%	30%	37%	39%
Scenic drives	34%	25%	35%	39%
Mall of America	29%	36%	27%	28%
State/national parks	24%	14%	27%	24%
Fairs/festivals/events	22%	19%	21%	26%
Driving on designated scenic byways	20%	14%	21%	22%
Hiking/backpacking	19%	11%	21%	22%
Swimming	18%	12%	24%	14%
Nightlife, concerts and entertainment	17%	21%	16%	16%
Historical attractions	16%	13%	17%	17%
Wineries/breweries/distilleries	15%	16%	13%	18%
Fishing	15%	11%	19%	12%
Arts and cultural activities	14%	16%	13%	15%
Casinos	14%	18%	12%	14%
Museums and galleries	13%	17%	12%	13%
Wildlife/bird watching	13%	8%	12%	17%
Health and wellness activities	11%	12%	12%	11%
Professional sporting events	10%	11%	10%	10%
Zoos	10%	10%	10%	10%
Camping	9%	4%	10%	10%
Amusement parks/carnivals	8%	7%	9%	8%
Canoeing/kayaking	8%	2%	11%	7%
Amateur sporting events/tournaments	7%	10%	6%	7%
Water parks	7%	7%	7%	6%
Motor boating/water skiing/jet skiing	7%	3%	10%	5%
Theater performances	6%	10%	4%	5%
Paved trail/road biking	6%	4%	6%	7%
Golfing	5%	4%	6%	3%

Trip activities – season-specific

Winter activities	TOTAL	Minnesotans	Non-MN U.S.
Ice fishing	12%	11%	12%
Snowmobiling	8%	8%	8%
Downhill skiing/snowboarding	8%	7%	8%
Cross-country skiing	6%	6%	5%
Any winter-specific activity	**23%**	**25%**	**21%**

Spring-Summer	TOTAL	Minnesotans	Non-MN U.S.
Paddling – canoeing, kayaking, paddleboard, etc.	11%	11%	11%
Parades and cultural events	6%	6%	6%
Motor boating/water skiing/jet skiing	7%	8%	5%
Golfing	5%	5%	4%

Fall	TOTAL	Minnesotans	Non-MN U.S.
Viewing fall colors	38%	44%	33%

- More than a third of fall trips include viewing fall colors.
- Individual winter outdoor activities are more niche.
- Summer trips include a wider array of activities, consistent with longer trips.
- Out-of-state visitors tend to do more activities in Minnesota.

Ave # activities	2019	Winter	Spring-Summer	Fall
Minnesotans	6.1	5.5	5.8	7.0
Non-MN U.S.	6.4	6.3	6.4	6.4

Trip motivators – Minnesotans

- Visitors were asked which of their trip activities motivated them to choose MN as their destination. Shown are activities that motivated 2% or more of trips.
- A third of in-state trips were motivated by visiting friends and family, which is directionally in line with trip purpose.
- Fall colors motivated a fifth of fall trips by in-state travelers.

Minnesotan trip motivators	2019	Winter	Spring-Summer	Fall
Friends or relatives	36%	35%	38%	33%
Dining out	18%	17%	20%	15%
Mall of America	17%	18%	22%	10%
Shopping	17%	17%	20%	13%
Scenic drives	14%	14%	10%	19%
Sightseeing	13%	13%	12%	13%
Viewing fall colors	13%			22%
State/national parks	11%	11%	7%	15%
Hiking/backpacking	7%	8%	5%	10%
Fairs/festivals/events	7%	7%	8%	6%
Fishing	7%	7%	5%	9%
Professional sporting events	7%	6%	9%	4%
Casinos	7%	7%	6%	9%
Wineries/breweries/distilleries	6%	6%	5%	7%
Nightlife, concerts and entertainment	5%	5%	6%	4%
Driving on designated scenic byways	5%	5%	4%	6%
Camping	5%	5%	3%	9%
Arts and cultural activities	4%	4%	5%	4%
Amateur sporting events/ tournaments	4%	4%	5%	3%
Swimming	4%	4%	3%	5%
Wildlife/bird watching	4%	4%	2%	5%
Museums and galleries	3%	3%	4%	2%
Zoos	3%	3%	3%	3%
Historical attractions	3%	3%	3%	3%
Theater performances	3%	3%	4%	2%
Hunting	3%	3%	1%	5%
Water parks	2%	2%	2%	2%
Amusement parks/carnivals	2%	2%	2%	2%
Health and wellness activities	2%	2%	2%	1%

Trip motivators – out-of-state

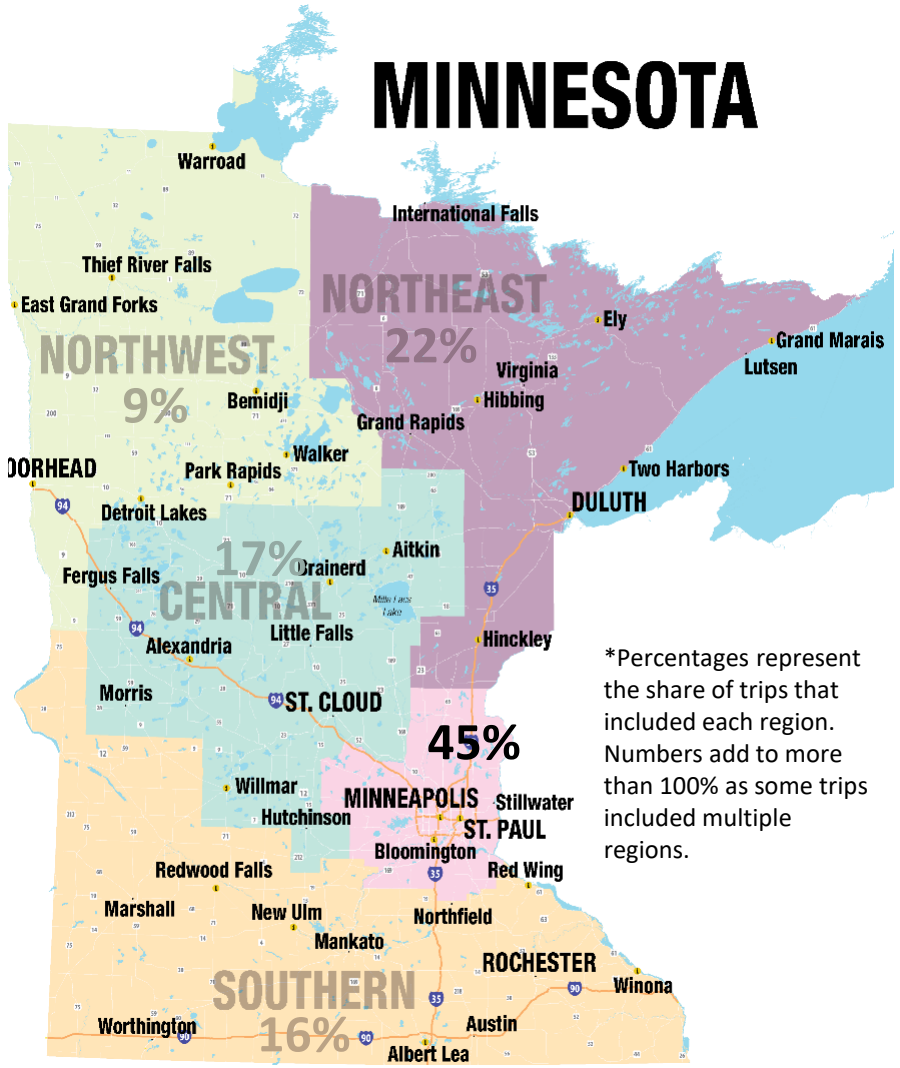
- As with in-state trips, a third of out-of-state trips were motivated by visiting friends or family, with a higher share in winter, which could be family holidays.
- A quarter of out-of-state visits were motivated by Mall of America.
- Sightseeing is another big draw, particularly in summer.

Non-MN U.S. trip motivators	2019	Winter	Spring-Summer	Fall
Friends or relatives	37%	45%	33%	37%
Mall of America	26%	24%	25%	27%
Shopping	21%	24%	21%	18%
Dining out	18%	27%	19%	10%
Sightseeing	13%	9%	17%	9%
Scenic drives	10%	5%	13%	9%
Professional sporting events	9%	11%	8%	8%
Fairs/festivals/events	8%	9%	8%	8%
State/national parks	7%	3%	8%	8%
Nightlife, concerts and entertainment	7%	7%	7%	6%
Hiking/backpacking	6%	2%	9%	5%
Fishing	5%	2%	8%	3%
Casinos	5%	6%	3%	6%
Viewing fall colors	5%			12%
Wineries/breweries/distilleries	5%	5%	4%	6%
Arts and cultural activities	5%	6%	5%	3%
Amateur sporting events/tournaments	4%	6%	3%	3%
Swimming	4%	2%	5%	3%
Museums and galleries	4%	4%	4%	3%
Driving on designated scenic byways	3%	3%	4%	3%
Zoos	3%	3%	3%	4%
Historical attractions	3%	2%	3%	2%
Camping	2%	1%	3%	2%
Wildlife/bird watching	2%	1%	2%	2%
Theater performances	2%	6%	1%	1%
Water parks	2%	1%	3%	2%
Amusement parks/carnivals	2%	2%	2%	1%
Health and wellness activities	2%	2%	1%	2%
Hunting	1%	1%	0%	1%

Trip motivators – Total

Total trip motivators	2019	Winter	Spring-Summer	Fall
Friends or relatives	36%	40%	36%	35%
Mall of America	21%	21%	24%	19%
Shopping	19%	21%	21%	16%
Dining out	18%	22%	19%	12%
Sightseeing	13%	11%	15%	11%
Scenic drives	12%	9%	12%	14%
Viewing fall colors	9%	7%	4%	17%
State/national parks	9%	6%	7%	11%
Fairs/festivals/events	8%	8%	8%	7%
Professional sporting events	8%	9%	8%	6%
Hiking/backpacking	7%	4%	7%	7%
Nightlife, concerts and entertainment	6%	6%	7%	5%
Fishing	6%	4%	6%	6%
Casinos	6%	6%	4%	7%
Wineries/breweries/distilleries	5%	5%	4%	7%
Arts and cultural activities	5%	5%	5%	4%
Driving on designated scenic byways	4%	4%	4%	5%
Amateur sporting events/tournaments	4%	5%	4%	3%
Swimming	4%	3%	4%	4%
Camping	4%	3%	3%	5%
Museums and galleries	3%	4%	4%	3%
Zoos	3%	3%	3%	4%
Historical attractions	3%	2%	3%	3%
Wildlife/bird watching	3%	2%	2%	4%
Theater performances	3%	5%	2%	2%
Water parks	2%	1%	2%	2%
Amusement parks/carnivals	2%	2%	2%	2%
Canoeing/kayaking	2%	1%	2%	2%
Hunting	2%	2%	1%	3%

Trip specifics



*Percentages represent the share of trips that included each region. Numbers add to more than 100% as some trips included multiple regions.

- The Minneapolis-St. Paul area was a stop on half of trips by out-of-state travelers, and a third of in-state travelers.
- For in-state travelers, winter is the biggest season to go to the metro area.

Regional destination of MN trips	TOTAL			Winter			Spring-Summer			Fall		
	2019	MN	Non-MN U.S.	2019	MN	Non-MN U.S.	2019	MN	Non-MN U.S.	2019	MN	Non-MN U.S.
Northwest	9%	9%	10%	8%	8%	9%	10%	9%	10%	10%	9%	10%
Northeast	21%	29%	14%	19%	28%	12%	19%	25%	14%	25%	36%	15%
MSP Metro	46%	34%	57%	53%	49%	57%	44%	32%	56%	43%	27%	58%
Central	17%	24%	11%	14%	16%	12%	18%	25%	12%	18%	27%	9%
Southern	16%	13%	19%	15%	11%	19%	17%	13%	20%	15%	13%	17%

First-time vs. repeat visitors

First-time visitors	2019	Winter	Spring-Summer	Fall
Minnesotans	2%	4%	1%	2%
Non-MN U.S.	12%	12%	12%	13%

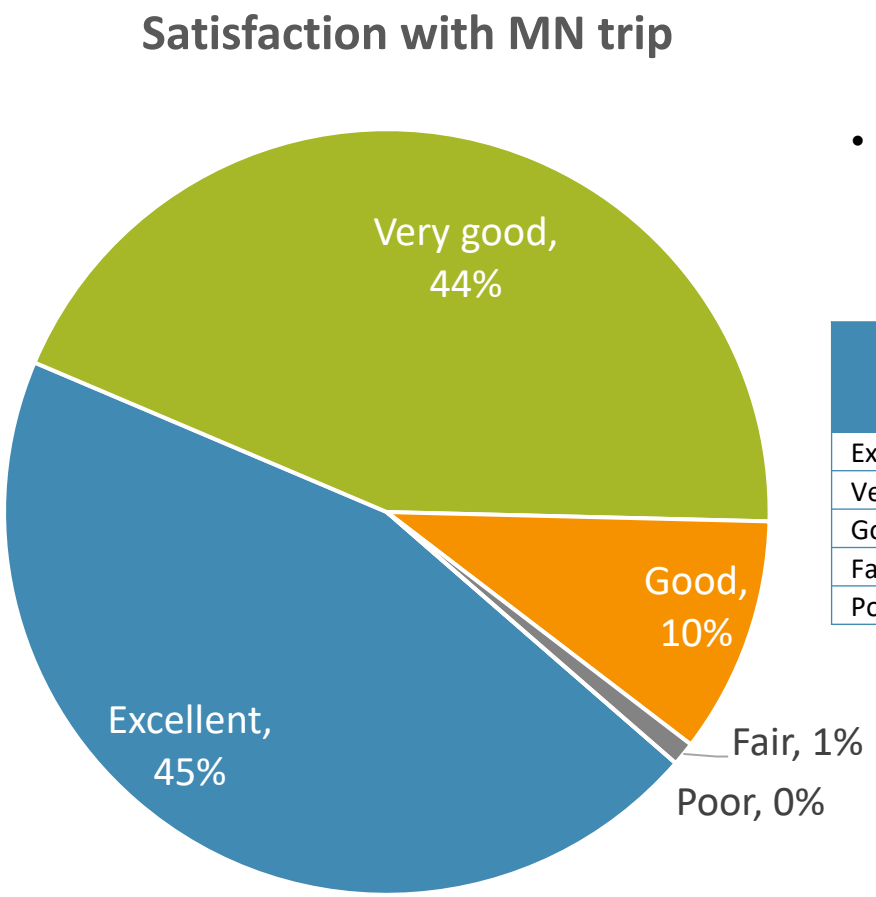
Visitors were asked about multiple trips to/within the state. They were asked if their earliest identified trip was their first trip to Minnesota.

- The vast majority of visitors are repeat visitors. This is critical to marketing the state, as this effort needs to continue to give repeat visitors reasons to return.
- At the same time, introducing new travelers to the state's leisure product is a way to grow visitor spending in the state, so this is an important metric to track. EMT's leisure marketing is also a key tool in this effort.
- The share of first-time visitors is higher among out-of-state visitors than in-state. Stated another way, in-state first-timers are a very small share of visitors.

Visit spending and per-person spending for overnight and day trip visitors

	2019				Winter				Spring-Summer				Fall			
	Total	**Overnight paid lodging**	**Day trip**	**Visit friends and relatives**	**Total**	**Overnight paid lodging**	**Day trip**	**Visit friends and relatives**	**Total**	**Overnight paid lodging**	**Day**	**Visit friends and relatives**	**Total**	**Overnight paid lodging**	**Day trip**	**Visit friends and relatives**
Lodging and camping accommodations	$208	$291	$0	$25	$152	$224	$0	$90	$247	$334	$0	$4	$191	$273	$0	$13
Food and beverage	$147	$167	$49	$110	$122	$144	$76	$99	$159	$181	$47	$106	$146	$162	$34	$122
Arts & culture	$19	$23	$7	$13	$12	$15	$26	$8	$22	$24	$1	$16	$21	$25	$5	$12
Recreational fees, rentals, equipment, etc.	$18	$22	$6	$11	$16	$28	$0	$4	$19	$23	$0	$10	$17	$17	$18	$19
Sporting events	$20	$25	$24	$9	$16	$23	$35	$5	$17	$20	$20	$7	$28	$34	$24	$14
Other events, entertainment, attractions	$36	$42	$19	$26	$29	$39	$30	$17	$36	$40	$6	$27	$40	$45	$31	$29
Shopping – tourist	$44	$54	$8	$29	$32	$46	$25	$17	$44	$51	$2	$31	$53	$63	$6	$34
Shopping – general	$55	$63	$35	$43	$54	$75	$46	$30	$54	$59	$29	$42	$57	$60	$37	$52
Transportation within Minnesota	$42	$45	$13	$37	$31	$29	$13	$34	$41	$46	$14	$31	$50	$54	$11	$48
Other	$22	$31	$0	$5	$10	$19	$2	$1	$10	$13	$0	$0	$46	$65	$0	$13
Total	**$611**	**$761**	**$163**	**$308**	**$472**	**$640**	**$252**	**$305**	**$648**	**$790**	**$120**	**$275**	**$649**	**$798**	**$166**	**$357**
Travel party	2.8	3.0	2.4	2.6	2.7	2.6	3.1	2.7	3.0	3.3	2.3	2.5	2.7	2.9	2.1	2.6
Per-person spending	**$215**	**$253**	**$67**	**$120**	**$175**	**$246**	**$81**	**$113**	**$216**	**$239**	**$52**	**$110**	**$240**	**$275**	**$79**	**$137**

Visit satisfaction



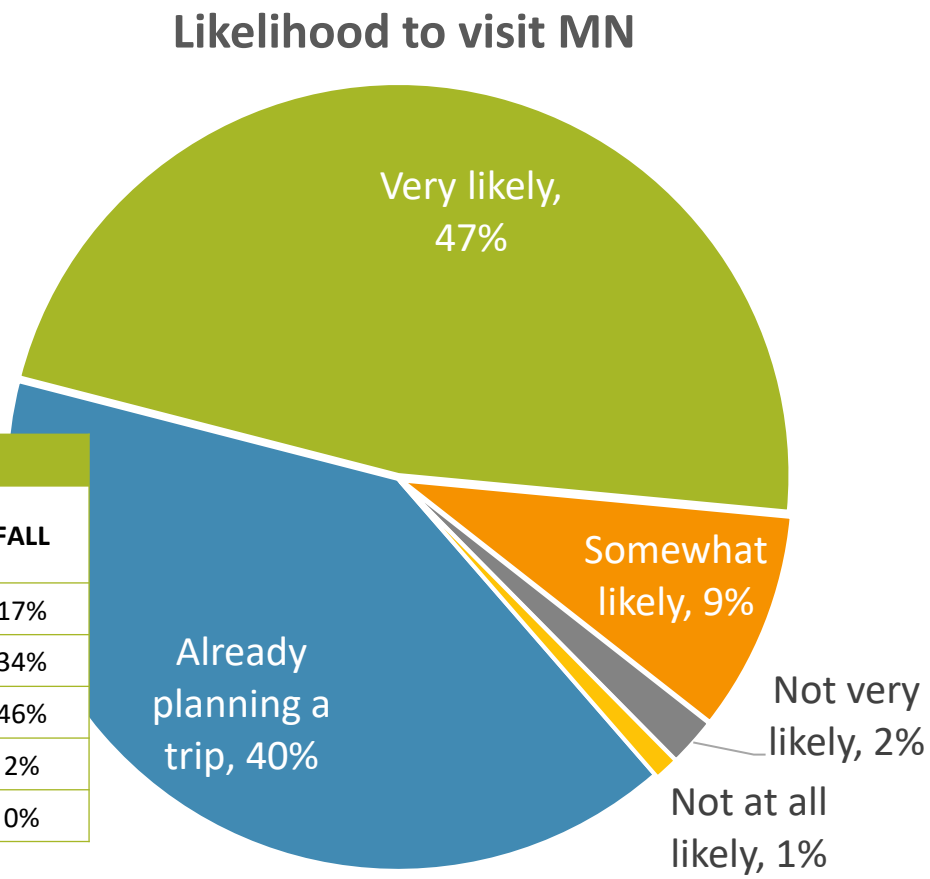
- Nearly 9 in 10 visitors said their experience in Minnesota was excellent or very good. Fall trips have a particularly high share of “excellent” responses.

		Minnesotans				Non-MN U.S.			
	2019	2019	WINTER	SPRING-SUMMER	FALL	2019	WINTER	SPRING-SUMMER	FALL
Excellent	45%	52%	44%	51%	59%	40%	38%	39%	43%
Very good	44%	41%	45%	44%	34%	46%	47%	48%	43%
Good	10%	7%	10%	5%	6%	13%	14%	11%	14%
Fair	1%	0%	1%	0%	0%	1%	1%	1%	1%
Poor	0%	0%	0%	0%	0%	0%	0%	0%	0%

Future visit intent

- Given the high level of satisfaction among visitors, it is not surprising that there is also a high level of likelihood to visit again.

2019	Minnesotans				Non-MN U.S.			
	2019	WINTER	SPRING-SUMMER	FALL	2019	WINTER	SPRING-SUMMER	FALL
Already planning a trip	43%	49%	43%	39%	25%	30%	28%	17%
Very likely	51%	46%	51%	54%	41%	37%	47%	34%
Somewhat likely	5%	3%	4%	6%	30%	27%	19%	46%
Not very likely	0%	1%	1%	0%	4%	4%	5%	2%
Not at all likely	1%	1%	1%	0%	1%	1%	2%	0%



Canadian traveler profile

This section focuses on Canadian visitors to Minnesota.

Canadian visitors

- We surveyed 129 Canadian visitors and gathered data on more than 250 Minnesota trips, with the seasonal distribution:
  - Winter – 43%
  - Spring-Summer – 45%
  - Fall – 12%
- Roughly half (49%) of travel parties included kids.
- One in five (21%) are first-time visitors to Minnesota, which is a much higher rate than among domestic visitors.
- Most (92%) of trips are overnight; just 8% are day trips.

Travel party composition	
Spouse/partner	54%
Adult friends/relatives	34%
Child/ren under 6 years old	20%
Child/ren 6-12 years old	19%
Child/ren 13-18 years old	15%
Other	2%
Traveled by myself	18%

Travel party size			
Total	Winter	Spring-Summer	Fall
3.0	2.5	3.1	3.3

2019	Total	Winter	Spring-Summer	Fall
Nights in MN	3.3	3.8	3.9	3.1
Nights total	4.5	4.7	5.1	4.3

Canadian visitors

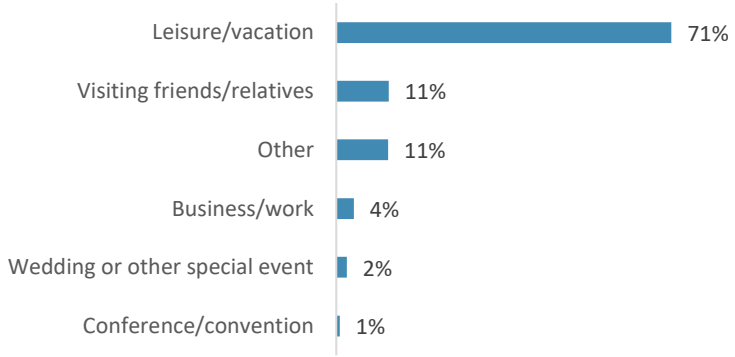
- Canadians spend considerably more in Minnesota than domestic visitors, which is part of the appeal and a reason to continue to invite Canadian visitation.
- Overall spending is two-thirds higher than domestic per-person trip spending.

	Total	Overnight, pd lodging	Day trip	Visit friends and relatives
Lodging and camping accommodations	$232	$265	$0	$144
Food and beverage	$228	$243	$9	$217
Arts & culture	$45	$48	$0	$43
Recreational fees, rentals, equipment, etc.	$50	$59	$0	$8
Sporting events	$61	$67	$0	$47
Other events, entertainment, attractions	$67	$71	$0	$66
Shopping – tourist	$68	$76	$3	$40
Shopping – general	$213	$242	$51	$84
Transportation within Minnesota	$61	$69	$7	$26
Other	$12	$14	$0	$0
Total	**$1,036**	**$1,155**	**$71**	**$675**
Travel party	2.9	3.1	1.5	2.8
Spending per person	**$354**	**$375**	**$47**	**$240**

Trip specifics

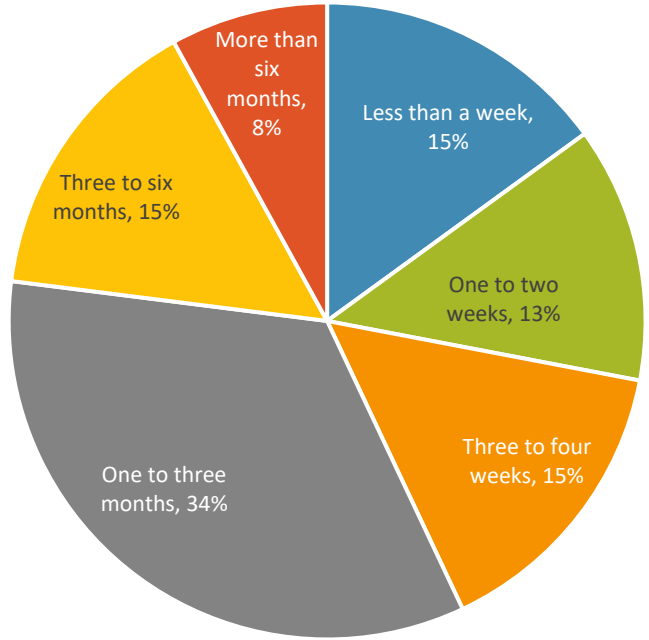
- Canadian visits resemble visits from out-of-state domestic travelers in that half of them include the Minneapolis-St. Paul metro area.
- Like domestic visits, the bulk of Canadian visits are for leisure. A smaller share of Canadian trips are to visit friends and family. Half of the “Other” responses are for sporting events.
- Canadians begin planning their Minnesota trips further ahead than domestic visitors; nearly a half plan from 1-6 months, which is longer than domestic visitors. This has implications for marketing to this audience, as messaging would need to be presented further in advance.

Purpose of Minnesota trip



Regions visited	
Northwest	22%
Northeast	24%
MSP Metro	51%
Central	9%
Southern	7%

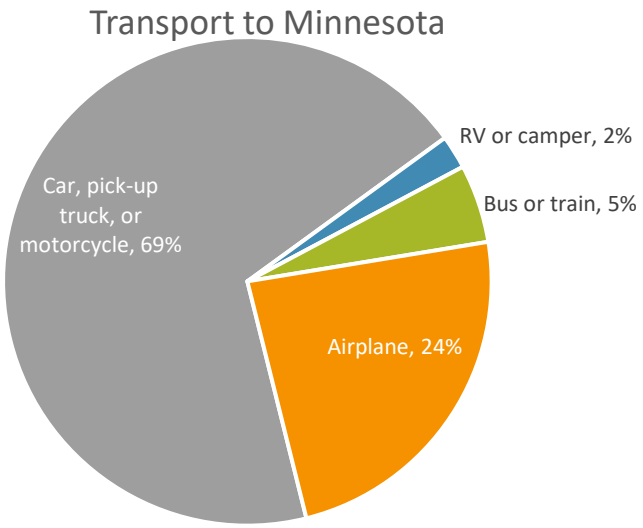
How far ahead of your trip did you choose your Minnesota destination as the place you would visit?



Trip specifics

- While auto travel is the most common way visitors get to Minnesota, Canadian visitors are more likely to fly to Minnesota than domestic visitors are.
- Canadian trips are more likely to include other destinations, compared with domestic visits.

Minnesota was my main destination	78%
I was ultimately headed somewhere else, but included a visit to Minnesota	12%
Minnesota was one of several places I decided to visit on this trip	10%



Demographics of Canadian visitors

- Half of Canadian visitors have kids at home, which is in line with out-of-state domestic visitors.
- Compared to domestic visitors, a higher share of Canadian visitors have household incomes of $75K USD or above (57% versus 50%).
- Canadian visitors are a more diverse group, with a particularly high share identifying as Asian.
- Canadian visitors are considerably younger on average than domestic visitors.

2019 Canadian visitors		
Household	Married/Domestic Partnership/Civil Union	62%
	Divorced/Separated	7%
	Widowed	2%
	Single/Never married	29%
	Kids in HH	50%
Education	High school or less	9%
	Some college/technical school	16%
	College graduate	60%
	Post-graduate degree	15%
Income (USD)	Less than $50,000	21%
	$50,000 - $74,999	22%
	$75,000 - $99,999	32%
	$100,000 - $124,999	15%
	$125,000 - $149,999	5%
	$150,000 or more	5%
Ethnicity	Caucasian/White	78%
	African-American/Black	2%
	Latino/Hispanic	2%
	Asian	16%
	American Indian	0%
	Other	2%
Age	Under 25	12%
	25-34	29%
	35-49	38%
	50-64	16%
	65+	5%

Trip activities

- Three-fourths of Canadian visits include shopping. This is a key activity for these visitors, considerably more so than for domestic visitors.

Activity participation (net of seasons)			
Shopping	75%	Theater performances	12%
Dining at unique locally owned restaurants (non-chain)	64%	Hiking/backpacking	12%
Mall of America	51%	Amateur sporting events/tournaments	11%
Sightseeing	45%	Wildlife/bird watching	10%
Scenic drives	37%	Camping	10%
Nightlife, concerts and entertainment	27%	Fishing	9%
Swimming	24%	Wineries/breweries/distilleries	7%
Friends or relatives	22%	Viewing fall colors	6%
Nature walks	22%	Paddling – canoeing, kayaking, paddleboard, etc.	6%
Arts and cultural activities	22%	Downhill skiing/snowboarding	6%
Driving on designated scenic byways	19%	Snowmobiling	5%
State/national parks	19%	Ice fishing	5%
Health and wellness activities	17%	Cross-country skiing	5%
Museums and galleries	17%	Mountain biking/fat biking	5%
Water parks	16%	Paved trail/road biking	5%
Fairs/festivals/events	16%	Parades and cultural events	5%
Casinos	16%	Motor boating/water skiing/jet skiing	5%
Professional sporting events	16%	Off-roading/ATV driving	4%
Historical attractions	16%	Hunting	2%
Amusement parks/carnivals	14%	Golfing	2%
Zoos	12%		

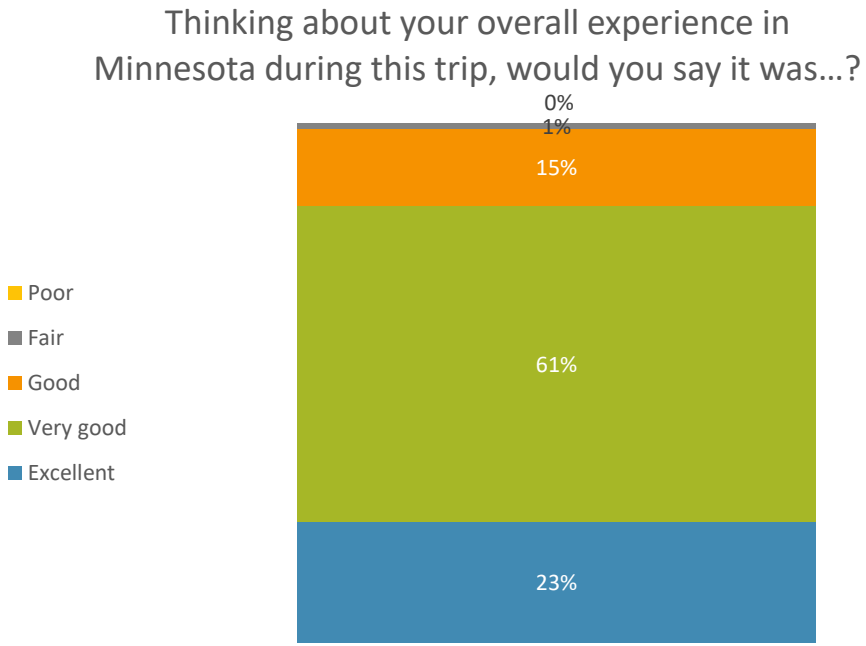
Trip motivators

Canadian trip motivators	
Shopping	48%
Mall of America	34%
Dining at unique locally-owned restaurants (non-chain)	18%
Friends or relatives	15%
Sightseeing	11%
Scenic drives	9%
Nightlife, concerts and entertainment	8%
Museums and galleries	8%
Water parks	7%
Arts and cultural activities	7%
Swimming	7%
Fairs/festivals/events	6%
Professional sporting events	6%
Historical attractions	6%
Casinos	6%
Driving on designated scenic byways	6%
Viewing fall colors	6%
Amateur sporting events/tournaments	5%
Camping	5%
Zoos	5%
Amusement parks/carnivals	5%

- Not surprisingly given the high share of trips that include shopping and Mall of America, these are also chief motivators for Canadians to choose Minnesota as their destination.
- Half of Canadian visits were motivated by shopping, and a third by Mall of America specifically.

Trip satisfaction & intent to return

- Canadian visitors, like domestic visitors, are generally very positive about their trip. Fewer said the trip was excellent, but more than half said it was very good. None rated the experience poor.
- Nearly 20% of Canadian visitors are already planning another Minnesota trip.



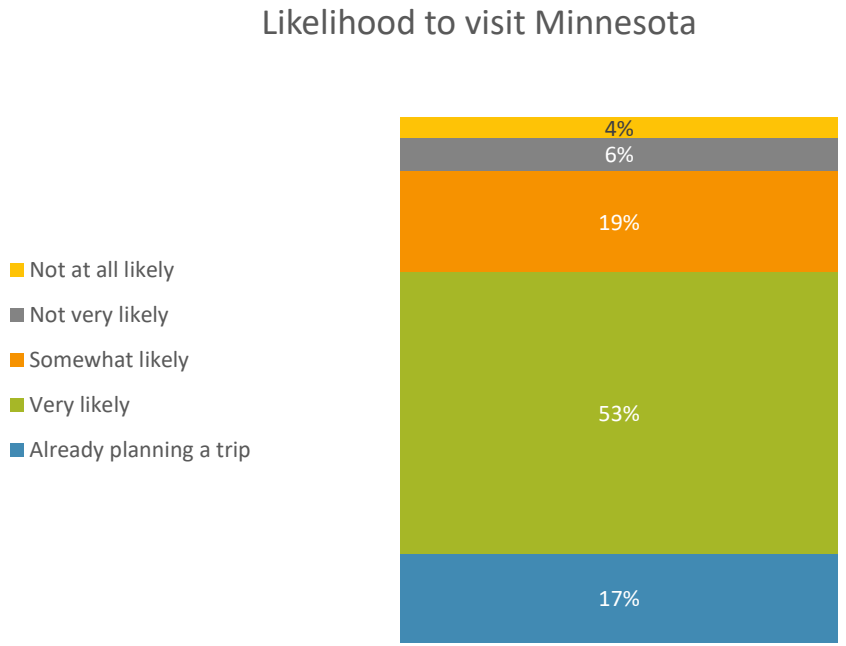


Image and positioning

2019 Traveler Profile

Perceptual mapping

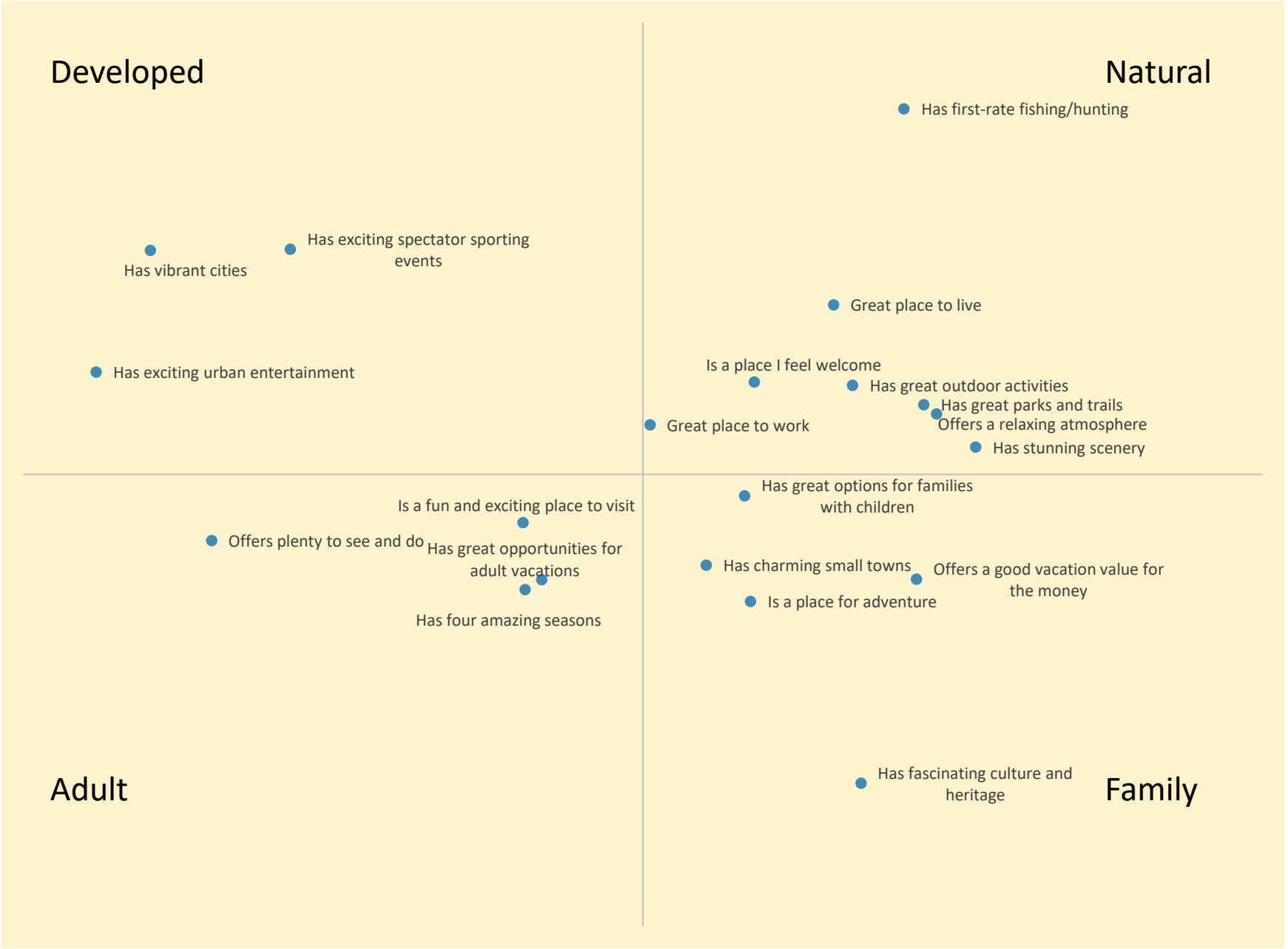
- In the course of surveying visitors, SMARInsights gathered data on traveler views of Minnesota. Travelers were asked to rate Minnesota on 20 image attributes. Each respondent was also asked to rate one other destination from those in Minnesota's consideration set or competitive set. This is a group of destinations that travelers might consider for the same type of trip. So it is relevant to understand where Minnesota is viewed in that context – how it is similar to other places and how it is differentiated.
- Perceptual mapping is a way to plot traveler views of destinations on a landscape. The map illustrates the image attributes and places that are similar and different. Perceptual mapping is a multi-step process:

1. Plot attribute ratings to establish the quadrants – which image ratings move together, and which are not viewed similarly by travelers
2. Plot the destinations on this map.

- Perceptual mapping creates a picture of how consumers evaluate the competitive destinations. It allows EMT to understand the competitive situation and the state's current image.

Consideration set
Minnesota
Colorado
Illinois
Manitoba/Western Ontario
Michigan
Missouri
South Dakota
Wisconsin

- The perceptual map shown here is the result of step one, plotting image ratings and evaluating the patterns created.
- The Family quadrant (lower right) is about safety, value, and edification, while the Adult quadrant (lower left) is about having an array of experiences and excitement.
- The upper right quadrant includes attributes relating to Natural outdoor activities, while the Developed quadrant (upper left) is defined by city assets.
- As with geographic maps, proximity indicates association.
- For example, it is notable that consumers associate culture and heritage more with family and value (lower right “Family” quadrant) than with urban/cities (upper left quadrant).



- Using the same data, we then add Minnesota and competitor destinations to the perceptual map.
- Not surprisingly, consumers view Minnesota almost exactly between the Developed (city/sports) and Natural quadrants.
- Colorado is the next closest destination and is also near the center between Developed and Natural.
- Manitoba/Western Ontario and Wisconsin are positioned very near each other at the intersection between Natural and Family.
- Michigan is in the Family sector, near adventure and value.
- South Dakota is exclusively Family, and far removed from any of the other quadrants.
- Missouri and Illinois share the Adult quadrant, with Illinois slightly closer to the Developed quadrant and Missouri closer to Family.
- This helps us understand that, in the views of consumers, Minnesota really owns its position on the perceptual map. And EMT's campaign highlighting the state's assets through the lens of pillar activities such as hiking, fishing, and arts/culture does a good job of featuring scenes that are consistent with consumer views.

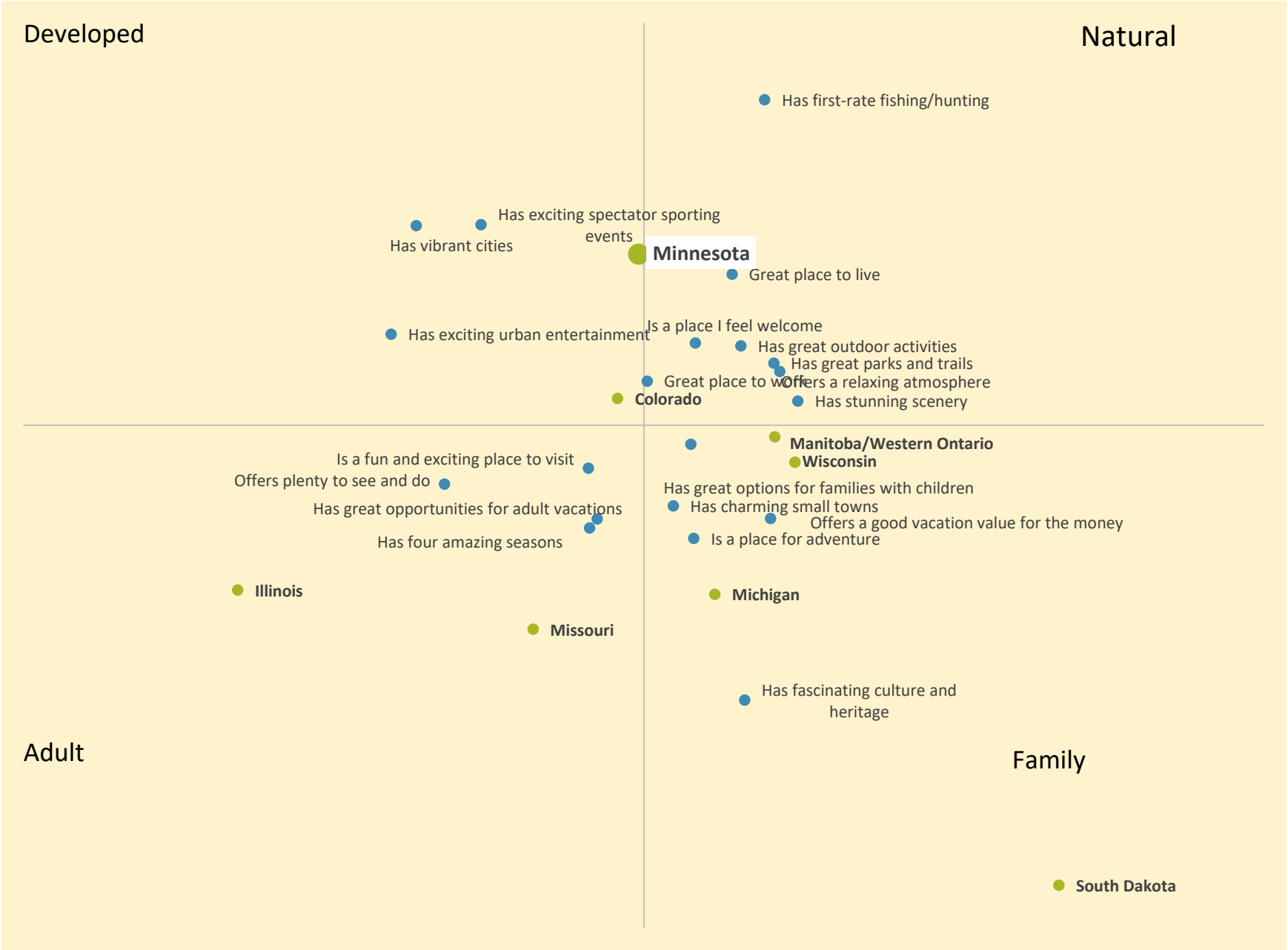


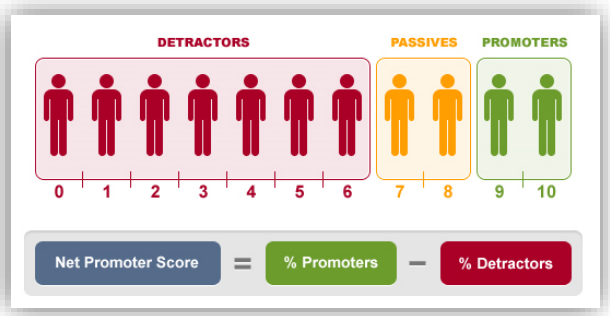
Image of the state

- Looking at open-ended responses from consumers when asked to describe the personality of Minnesota, we see that nature, beauty, scenic and other outdoor-asset-related terms are prominent, while its urban/sports and cultural assets are not mentioned as much. This may also be due to the fact that the state's cities and sports teams are not "personality" descriptions. It could also be that the urban areas and developed attractions are not top-of-mind for consumers, but when prompted on city-related attributes, people do recognize that Minnesota offers these experiences as well.
- Continuing to emphasize that the state offers both developed and natural assets is likely to provide travelers with reasons to visit more often and/or stay longer and would be consistent with views of the state.

Opportunities and insights

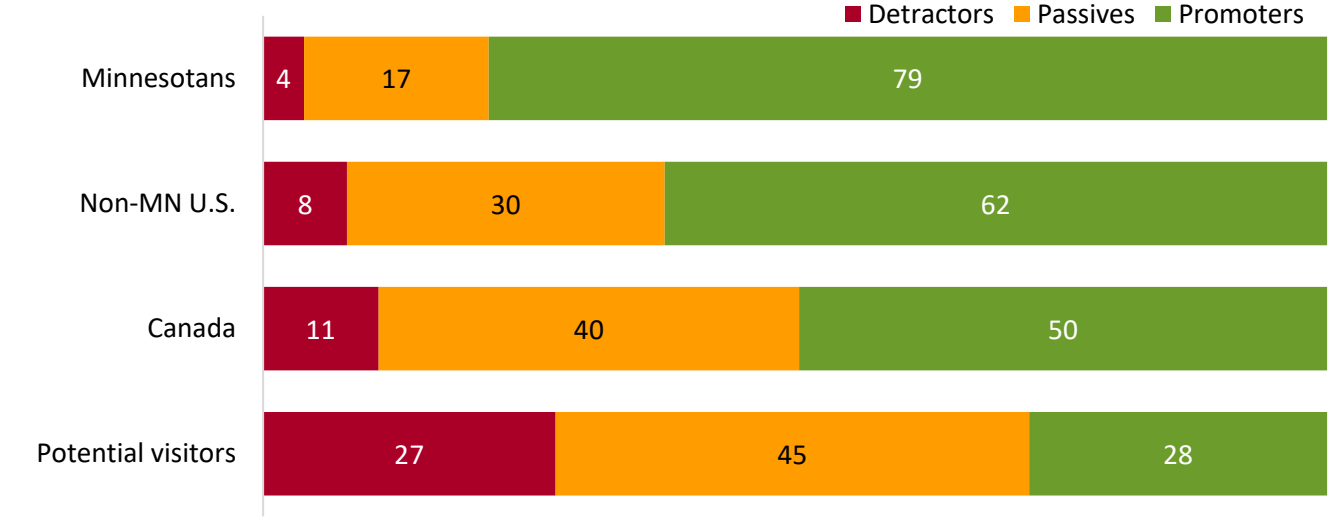
2019 Traveler Profile

Net Promoter Score



- The Net Promoter Score is an index ranging from -100 to 100 that measures the willingness of customers to recommend a company's products or services to others. It is used as a proxy for gauging customers' overall satisfaction with a company's product or service and the customers' loyalty to the brand. Within the U.S., Net Promoter Score leaders across various industries report scores ranging from 65 to 80.
- For tourism destinations, Net Promoter Score is an indicator of visitor experience with the destination, which includes a host of factors, not all of which are within the DMO's control: weather, transportation to the destination, customer service at lodging, retail, and food service, how crowded the destination is, etc. Thus for leisure destinations, Net Promoter Score is typically much lower than for other industries.
- Minnesota's Net Promoter Score is extremely high, particularly compared to the leisure travel Net Promoter Score benchmark of -4. Visitors give the destination a solidly positive score, and even potential visitors are positive about the state.

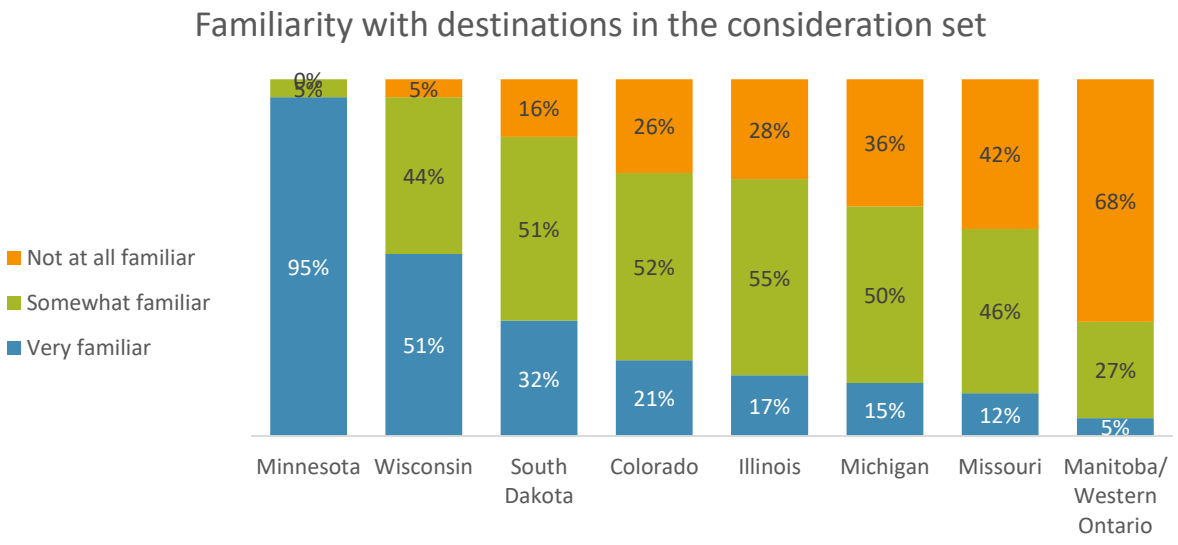
Net Promoter Score of MN visitors + potential visitors

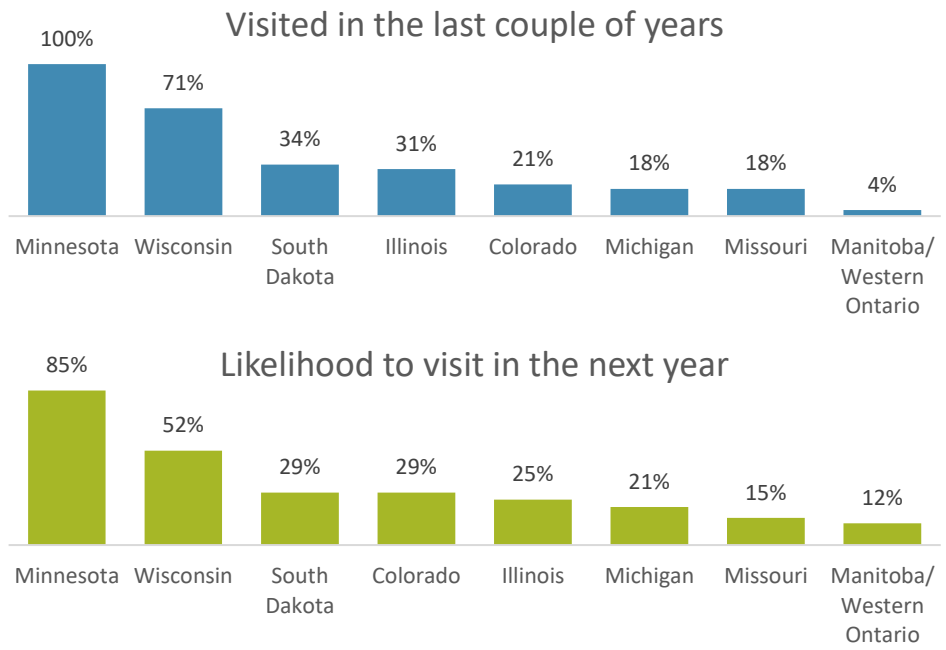


Net Promoter Score
75
54
39
1

Competitive situation with in-state visitors

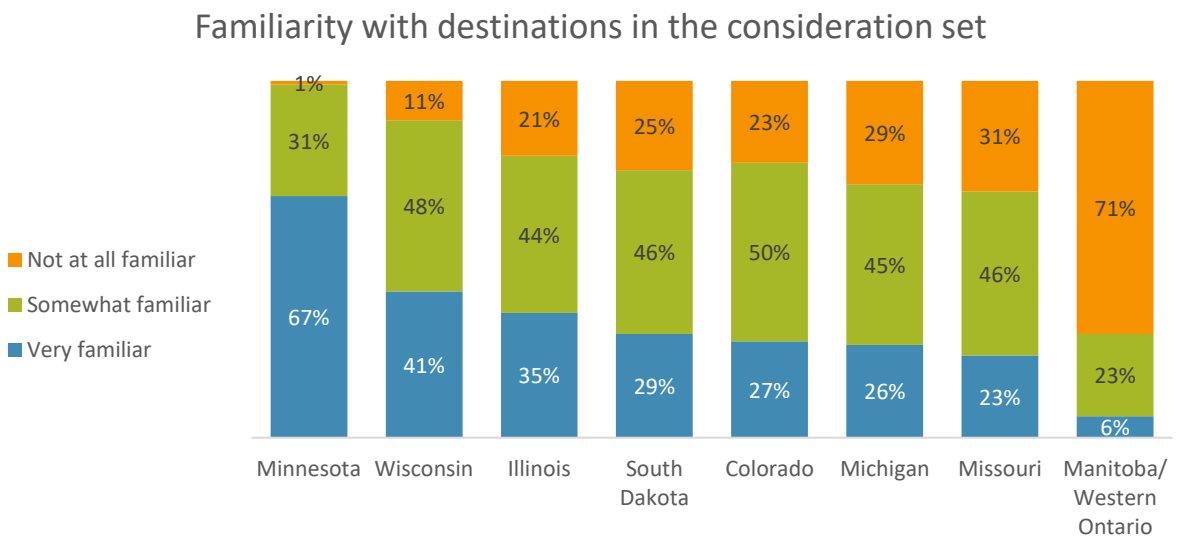
- Among in-state visitors, MN leads among the competitive set in familiarity, past visitation, and likelihood to visit in the next year, and we would expect this.
- Wisconsin is the next most familiar destination and has the next highest intent to visit within the next year, not surprising given its proximity. This is also where the highest share of out-of-state domestic visitors come from.

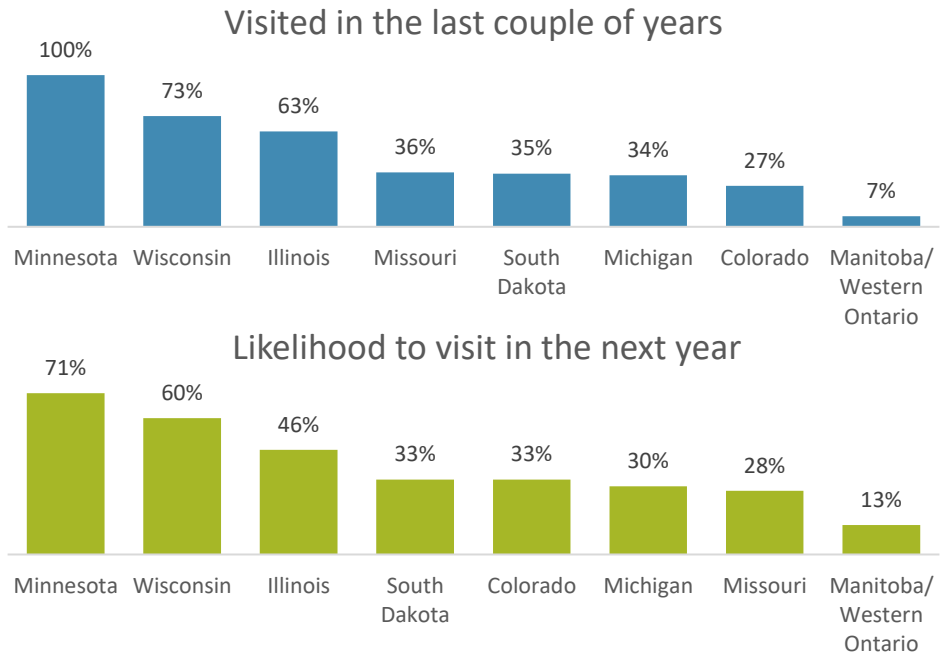




Competitive situation with non-MN U.S. visitors

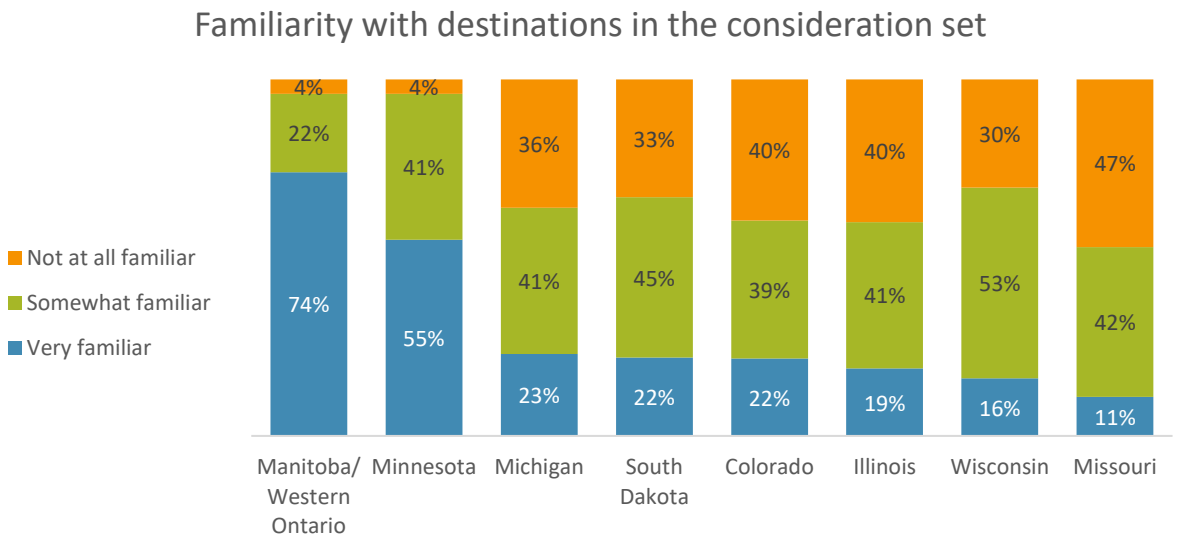
- Wisconsin is also a close second among out-of-state domestic visitors in terms of visit interest and prior experience. This is likely due to the high share of Wisconsin residents in the visitor population. Looking at visitors from each state, the highest visit intent is for travel within their home state.
- However, as the Wisconsin Dells promotes itself as the "water park capital of the world," this helps position the whole state as a family fun destination. It's worthwhile to note that on the perceptual map, Wisconsin is fairly far removed from Minnesota, in the family quadrant. This presents EMT an opportunity for differentiation – while also continuing to appeal to family travelers.

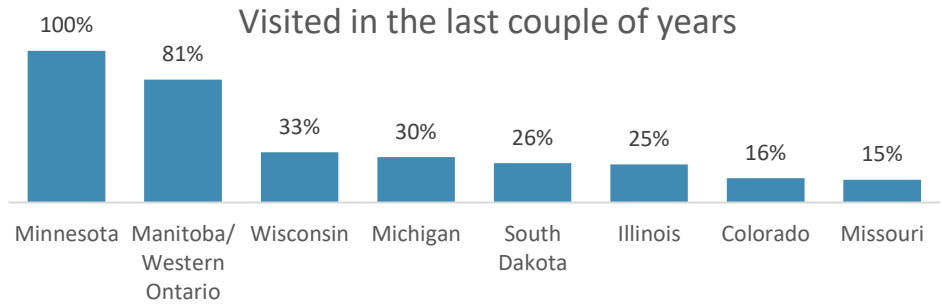


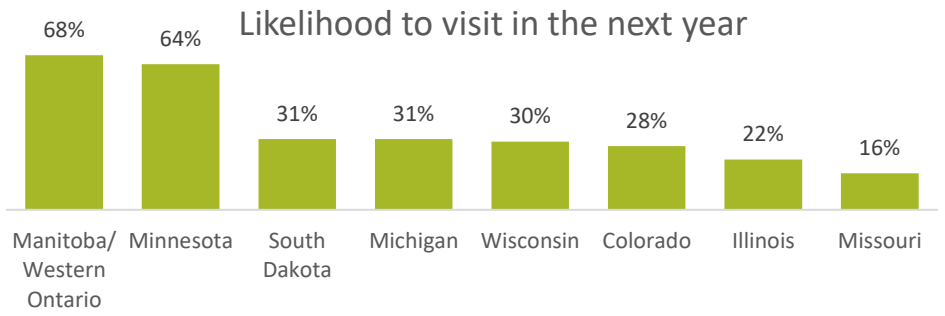


Competitive situation with Canadian visitors

- Among Canadian visitors, Manitoba/Western Ontario has strong familiarity and visit interest. This is consistent with proximity being a driver of destination selection.
- It is notable that Minnesota is a close second in visit intent. Michigan and Wisconsin are a distant third and fourth.







Opportunities

- Among potential visitors, the strongest correlations with likelihood to visit MN are value for the money and the halo attributes: being a great place to live and work. Further, these travelers are more interested in urban entertainment and adult trips.
- For current visitors, on the other hand, being a family destination, a great place to live, and great parks and trails are the image attributes most closely related to visit intent. Correlations among these travelers are the state's relaxation, welcoming, and small towns.
- EMT's current marketing highlights both of these aspects of the state, and it may be that current and potential visitors need to be targeted with different messaging.

Correlations with likelihood to visit			
Potential Visitors only		**Visitors only**	
Offers a good vacation value for the money	20%	Has great options for families with children	27%
Great place to live	19%	Great place to live	25%
Great place to work	18%	Has great parks and trails	25%
Has great opportunities for adult vacations	17%	Offers a relaxing atmosphere	25%
Has exciting spectator sporting events	17%	Has charming small towns	25%
Has great parks and trails	17%	Is a place I feel welcome	24%
Has vibrant cities	16%	Offers a good vacation value for the money	24%
Has exciting urban entertainment	16%	Great place to work	23%
Offers a relaxing atmosphere	16%	Offers plenty to see and do	23%
Is a place for adventure	16%	Is a fun and exciting place to visit	23%
Is a fun and exciting place to visit	15%	Has great opportunities for adult vacations	22%
Has first-rate fishing/hunting	15%	Has great outdoor activities	21%
Has great outdoor activities	15%	Has first-rate fishing/hunting	21%
Has fascinating culture and heritage	15%	Is a place for adventure	20%
Is a place I feel welcome	14%	Has stunning scenery	20%
Offers plenty to see and do	14%	Has exciting urban entertainment	20%
Has charming small towns	14%	Has vibrant cities	20%
Has stunning scenery	12%	Has fascinating culture and heritage	20%
Has great options for families with children	12%	Has exciting spectator sporting events	17%
Has four amazing seasons	8%	Has four amazing seasons	16%

Correlations of MN image ratings (on a 5-point scale) to likelihood to visit Minnesota in the next year (ranging from not at all likely to already planning a trip)

Image Ratings

- As we learned in a separate creative evaluation study, consumers are generally favorable toward MN but may lack specific knowledge about it. That is what we see among potential visitors, and particularly in light of the stronger correlations between visit interest and developed/urban experiences, marketing the state's urban assets to these travelers is a way to help fill in that information void.
- One way to encourage current visitors to return is to reinforce messaging that Minnesota is a welcoming place, great for families, and has great parks and trails.

How much do you agree that these statements describe Minnesota?

Visitors	
Has great parks and trails	4.5
Has great outdoor activities	4.5
Is a place I feel welcome	4.4
Has great options for families with children	4.4
Offers plenty to see and do	4.4
Has stunning scenery	4.4
Has first-rate fishing/hunting	4.4
Has four amazing seasons	4.3
Has charming small towns	4.3
Offers a relaxing atmosphere	4.3
Has great opportunities for adult vacations	4.3
Is a fun and exciting place to visit	4.3
Offers a good vacation value for the money	4.2
Has vibrant cities	4.2
Is a place for adventure	4.2
Has exciting spectator sporting events	4.1
Great place to live	4.1
Has exciting urban entertainment	4.1
Great place to work	4.0
Has fascinating culture and heritage	4.0

Potential visitors	
Has great outdoor activities	4.1
Has stunning scenery	4.1
Has great parks and trails	4.0
Offers a relaxing atmosphere	4.0
Offers plenty to see and do	4.0
Has first-rate fishing/hunting	4.0
Is a place I feel welcome	3.9
Has great options for families with children	3.9
Has charming small towns	3.9
Has great opportunities for adult vacations	3.9
Has four amazing seasons	3.9
Is a place for adventure	3.9
Offers a good vacation value for the money	3.9
Is a fun and exciting place to visit	3.9
Has vibrant cities	3.8
Has exciting urban entertainment	3.7
Has exciting spectator sporting events	3.7
Has fascinating culture and heritage	3.7
Great place to live	3.6
Great place to work	3.5

MN image ratings on a 5-point scale where 5=describes extremely well and 1=does not describe at all

Opportunities

- Most of the travel research sources are similar between current and potential visitors. But two of the items listed are different: Family or friends and travel agents.
- Family or friends are typically the leading source of information for trip planning, and Minnesota visitors are no exception. But in this instance potential visitors are somewhat less likely to get info from friends and family.
- Travel agents, however, are more commonly used by potential visitors than visitors. There could be an opportunity to promote the state with new visitor messaging – focused on the state's developed/urban experiences – to reach potential visitors.

Travel research sources	Visitors	Potential visitors
Family or friends	73%	67%
Tourism websites for destinations you are visiting	59%	54%
Traveler review sites or apps (Yelp, TripAdvisor, etc.)	53%	51%
Travel advice websites or apps (Expedia, AAA, etc.)	46%	47%
Travel/visitor guides	46%	46%
Social media (Facebook, Instagram, etc.)	40%	42%
Advertisements (television, online, magazine, etc.)	23%	24%
Magazine and newspaper articles	20%	20%
Guidebooks like Frommer's or Lonely Planet	13%	15%
Travel agent	8%	14%
Other	3%	2%
None of these	2%	2%

Insights

- In the views of consumers, Minnesota really owns its position on the perceptual map between urban/developed and natural. EMT's marketing campaign highlighting the state's assets through the lens of pillar activities such as hiking, fishing, and arts/culture does a good job of featuring scenes that are consistent with consumer views.
- Consumers' top-of-mind image focuses on natural attributes, but consumers do realize that Minnesota is a combination of natural and developed. This position differentiates the state from key competitors, so it is important to continue to build the dual image and promote both natural and developed tourism assets.
- Another key take-away is that urban/developed and arts/culture are not the same. Rather, the urban experience that differentiates Minnesota is cities, sports, and entertainment.
- In-state and surrounding states are the current key markets. Seasonal differences, with longer planning horizons for more distant travelers, should be noted in developing marketing programs.
- Season-specific activities are also important; viewing fall colors, for instance. But the majority of trips include activities such as dining in unique, locally owned restaurants, shopping, and sightseeing, regardless of season. These basic activities need to be highlighted year-round.
- The majority of visitors are repeat visitors. So it is critical for marketing to give these repeat visitors reasons to return. At the same time, extending the marketing to reach more potential visitors would generate growth in the visitor base. Again, these groups may need different messaging.
- Visit satisfaction is high so repeat visitation will continue. The challenge though is how to maintain interest and introduce visitors to other parts of the state and new locations.
- Canadians are an opportunity, given the higher share of first-time visitors and that they spend more in the state.