explore MINNESOTA

2022-23 Winter Traveler Profile

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Background & Objectives

- Explore Minnesota Tourism (EMT) is partnering with Strategic Marketing & Research Insights, LLC, (SMARInsights) to study travelers who visit the state for leisure, to help inform the organization's marketing strategies and improve the effectiveness of its efforts to attract more visitors. EMT will use the data and analysis from this study to inform market selection and digital personalization.
- In some respects, this will be an update of the prior Traveler Profile Study conducted in 2019. Since then, a number of variables have altered the leisure travel and media landscapes – some potentially more long-term than others – including the pandemic, a volatile economy, and continued political and ideological polarization.
- This study includes potential visitors – travelers who have not visited Minnesota but who are open to the experiences it offers – to help identify growth opportunities for EMT. This report includes:
  - the visitor experience
  - trip specifics
  - awareness of the major attractions and events that compose the state's brand
  - what motivates leisure visits from each geography
  - flesh out the visitor journey from potential visitor to new visitor to repeat visitor, with insights at each stage of experience
  - compare visitor and potential visitor perceptions of the state and their awareness of what Minnesota offers

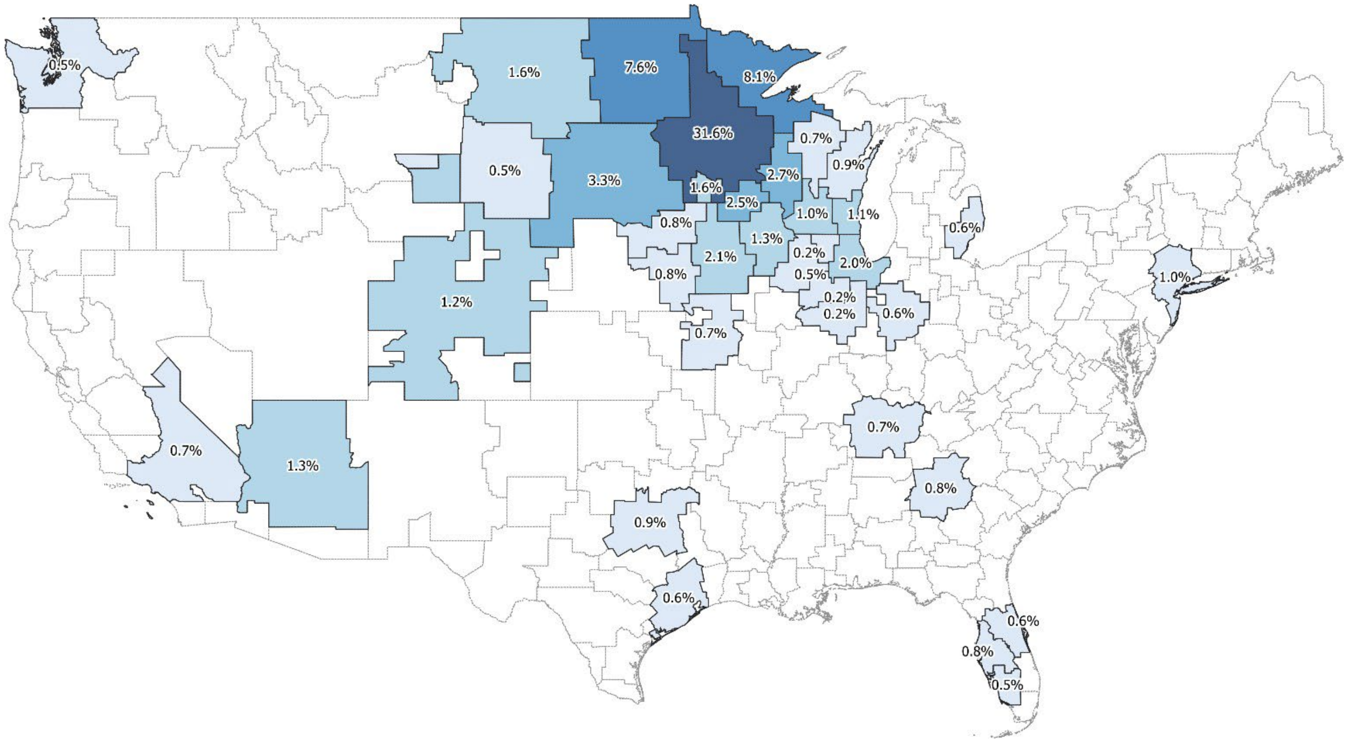
Methodology

- Respondents were screened to ensure that they were 21+ years of age, residents of the U.S. or the Canadian regions of Thunder Bay, Ontario, or Winnipeg, Manitoba, and travel decision-makers for their household.
- Winter visitors were screened to ensure they had visited the state between December 2022 and March 2023. Potential visitors were screened to ensure they had some level of familiarity with Minnesota and some degree of likelihood to visit in the next year.
- EMT's sampling plan is based on visitor activity. The markets surveyed comprise 84% of origin markets for winter visitors, as tracked by Datafy geolocation data. Domestic visitor data was weighted to EMT's Datafy data to reflect actual shares of unique visitors from the geographies where we surveyed. Canadian and potential visitor data was not weighted.
- Note that Colorado represents less than 1% of winter visitors to Minnesota, we have very few data points from this region. Therefore, this data is excluded from the report except in total figures.

Winter 2022-23	Surveys			Visitor Distribution	
	Total	Potential Visitor	Visitor	Surveys	Datafy
In-state	338	38	300	37.8%	49.5%
Surrounding states (ND, SD, IA, Omaha)	199	38	161	20.3%	15.5%
Midwest (WI, IN, OH, MI, Northern IL, St. Louis)	401	144	257	32.4%	17.8%
West (CO)	25	9	16	2.0%	0.8%
Canada (Winnipeg, Thunder Bay)	133	74	59	7.4%	
TOTAL	**1,096**	**303**	**793**	**100%**	**84%**

Where did winter visitors come from?

- EMT contracts with Datafy for geolocation data. The heat map below illustrates the origin markets of winter 2022-23 visitors to Minnesota.



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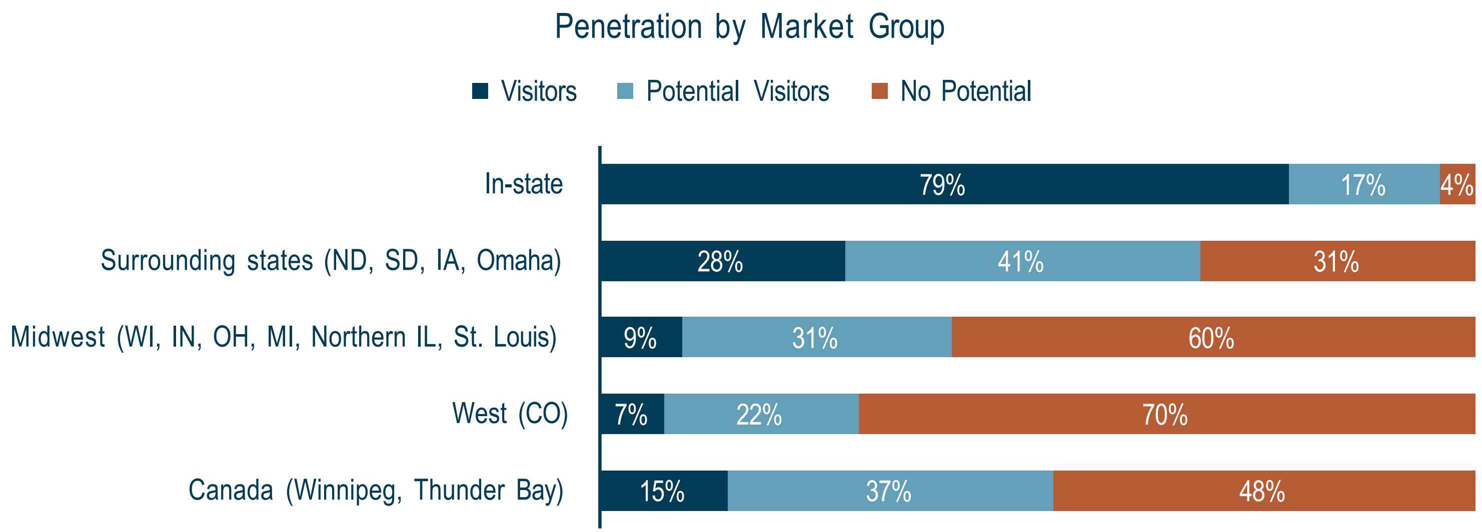
Visitor and Potential Visitor Origins

- Visitors are defined as those who taking a leisure trip to Minnesota during winter 2022-23. Potential visitors are travelers who did not visit Minnesota during winter but have some degree of likelihood to visit in the future.
- In order to find visitors, SMARInsights surveyed more than 10,000 consumers. From that total volume, the graph below shows penetration of visitors and potential visitors, as well as those with no potential (have not visited and have no intention to). This can be a helpful way to identify opportunity markets.



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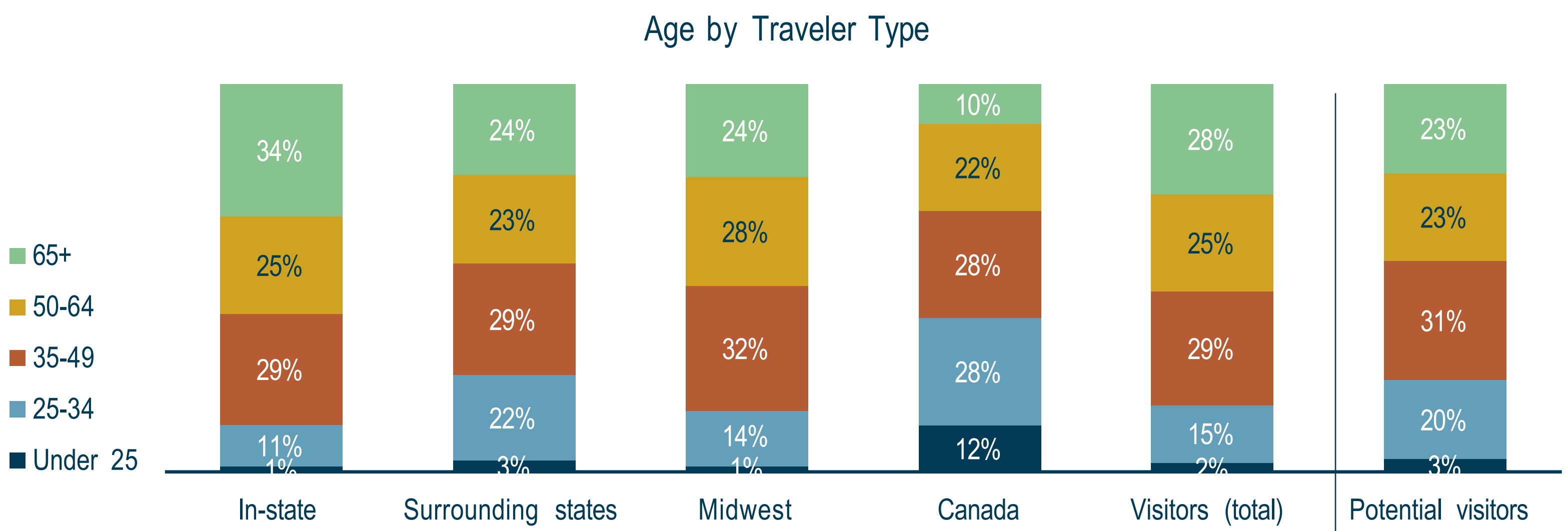
Demographics

In this section, we look at demographic characteristics of Minnesota's winter visitors and potential visitors

Demographic Profile of Winter Visitors

- As we saw in the 2019 visitor profile, Canadian visitors tend to be younger than domestic visitors.
- In-state visitors tend to be older, with a third being 65 or over.



Mean: 54 48 51 43 52 49

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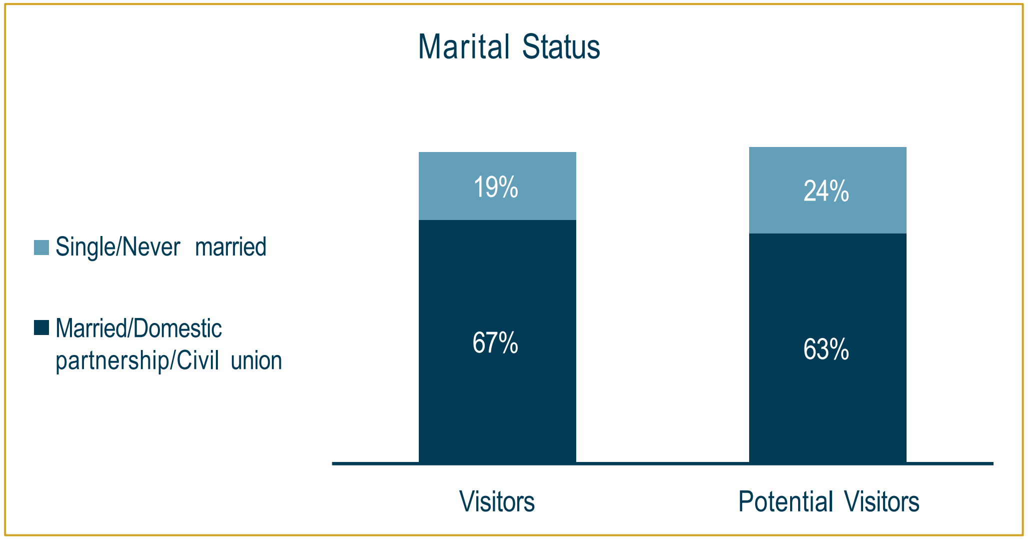
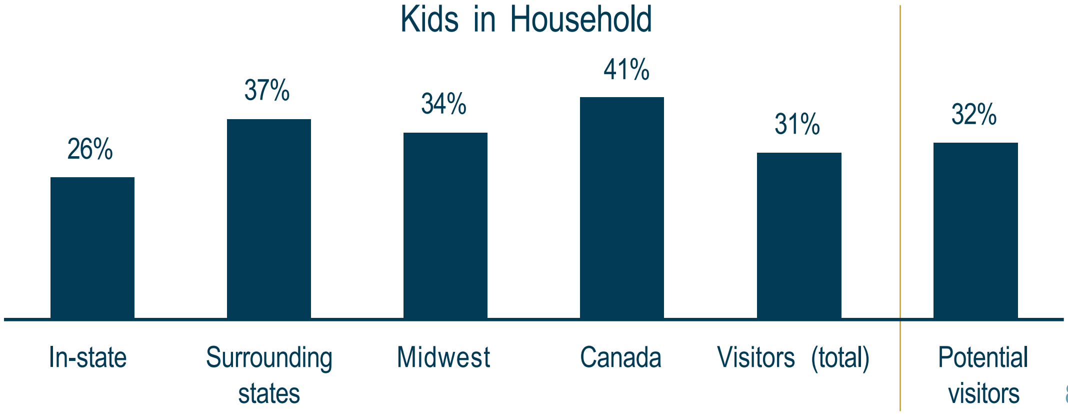
Demographic Profile of Winter Visitors

- Visitors are more likely than potential visitors to be married. A quarter of potential visitors are single/never married, which is consistent with a younger audience.
- Likewise, older populations – such as in-state – are less likely to have kids at home, which is in line with the prior measure.





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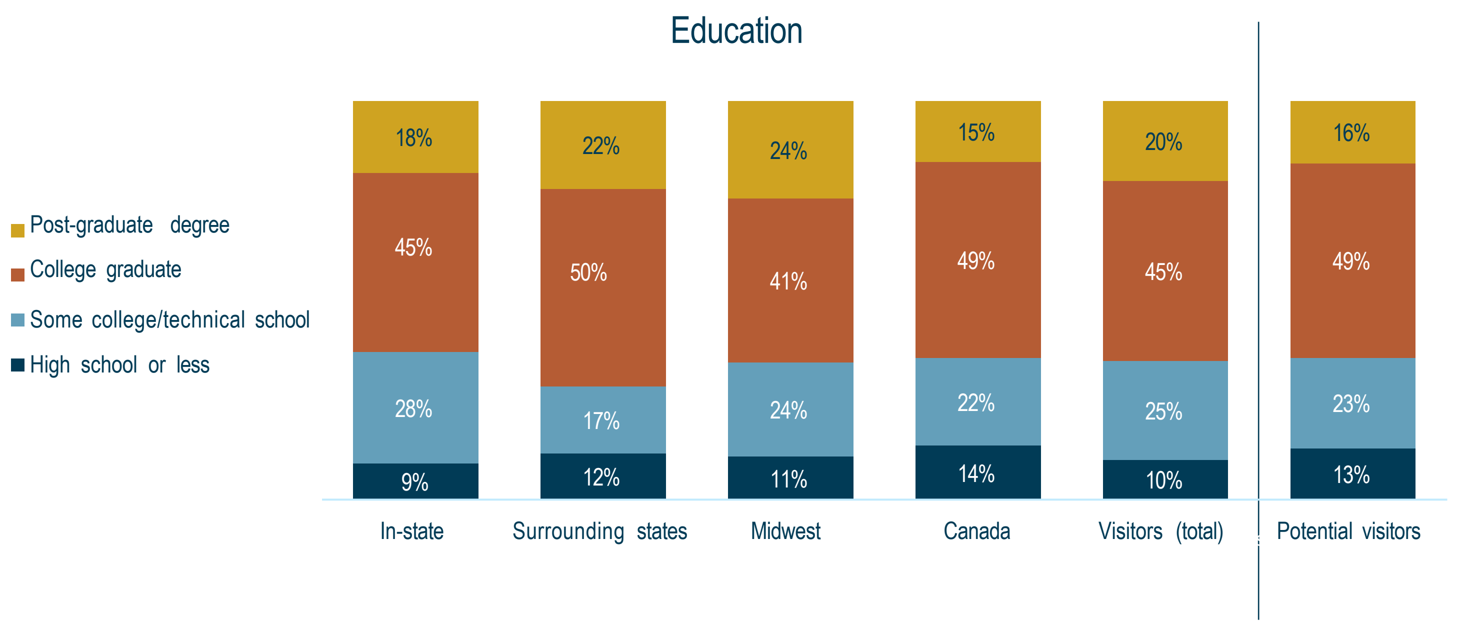
Demographic Profile of Winter Visitors

- Compared to the last traveler profile in 2019, education levels look very much the same in this measure.
- Potential visitors and Canadian visitors have slightly less education, which is consistent with being a younger audience.



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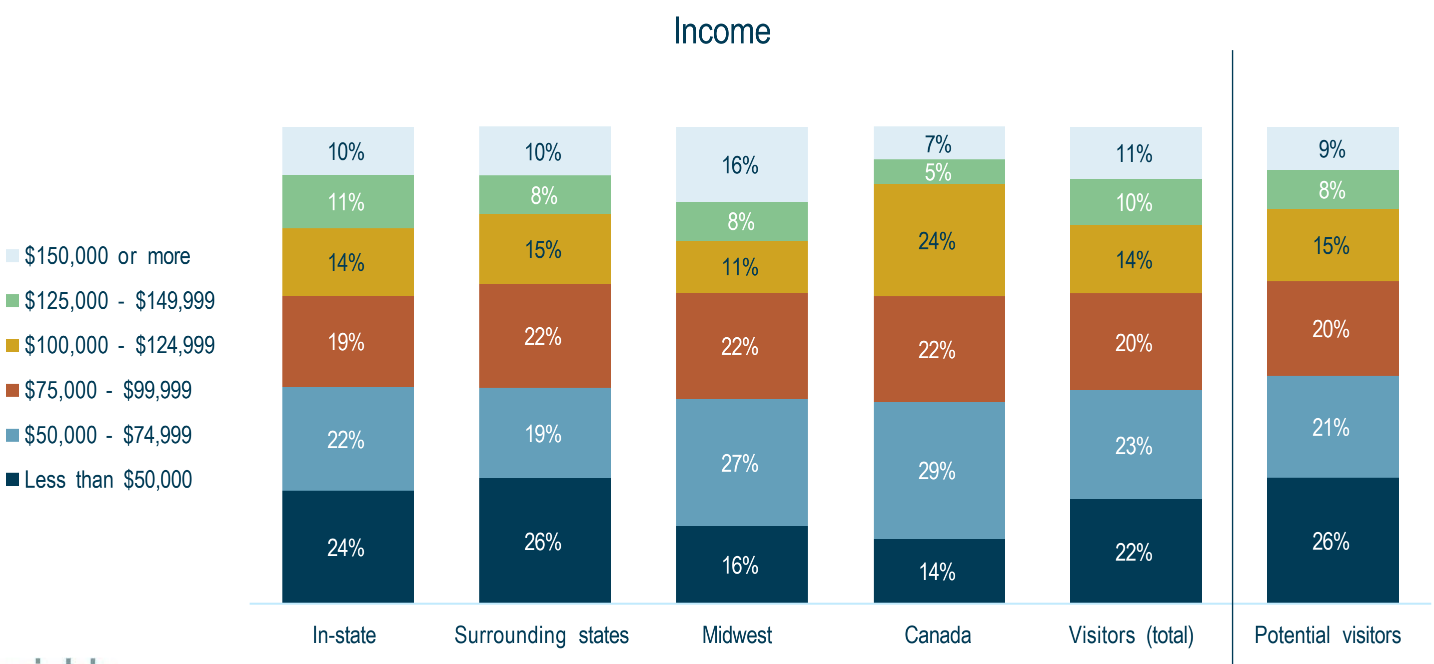
Demographic Profile of Winter Visitors

- We see lower incomes in-state and among surrounding states than farther areas. This makes sense as those who travel farther to visit are typically at least somewhat more affluent.
- Canadian incomes are higher, which could be the result of exchange rates.
- Potential visitors have lower incomes, again a function of being younger; income and age typically increase together.



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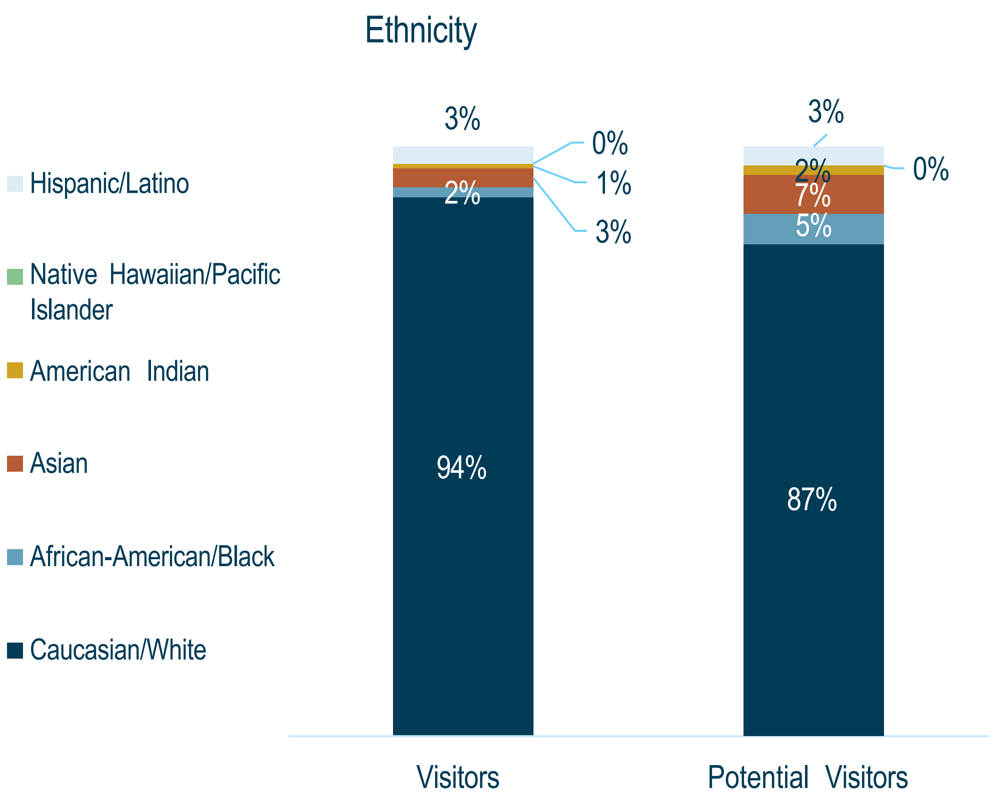
Demographic Profile of Winter Visitors

- Potential visitors are ethnically more diverse than winter visitors, as we saw in the prior measure.



Image

In this section, we examine consumer perceptions of Minnesota on a number of image attributes

Image Evaluation

Destination Benchmarks
>= 4.0 Excellent (top 10%)
3.75 – 3.99 Good (top 25%)
3.5 – 3.749 Average
< 3.5 Below Average

- Respondents were presented with 20 statements and asked how strongly they agreed that each one described Minnesota. Overall ratings among visitors are shown here.
- Ratings are highest for the outdoor product.
- Visitor ratings for all of these attributes are either good or excellent. Visitors are very familiar with Minnesota's leisure product and like that product, so it makes sense that ratings are high.
- Grouping these attributes by how they are rated can help us evaluate consumer perceptions by types of statements. We will look at that next.

How much do you agree that each of these statements describes MN? (Visitor)	
Has great outdoor activities	4.4
Has great parks and trails	4.4
Offers plenty to see and do	4.3
Is a place I feel welcome	4.3
Has stunning scenery	4.3
Has great options for families with children	4.3
Has first-rate fishing/hunting	4.3
Has four amazing seasons	4.2
Offers a relaxing atmosphere	4.2
Has charming small towns	4.2
Has great opportunities for adult vacations	4.2
Is a place for adventure	4.1
Is a fun and exciting place to visit	4.1
Offers a good vacation value for the money	4.1
Has vibrant cities	4.1
Has exciting spectator sporting events	4.0
Great place to live	3.9
Has exciting urban entertainment	3.9
Has fascinating culture and heritage	3.9
Great place to work	3.9

Types of Image Attributes

- Factor analysis produces two groups of image attributes. The first is natural and outdoor product, and the second is more developed product relating to cities and culture.
- Separating the attributes into these groups makes it easier to understand how different geographies view the state.

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

Perceptions of Minnesota's Outdoor Product

Destination Benchmarks
>= 4.0 Excellent (top 10%)
3.75 – 3.99 Good (top 25%)
3.5 – 3.749 Average
< 3.5 Below Average

- Among visitors and potential visitors from the U.S., Minnesota really owns outdoor. Consumers are aware of the state's parks and trails, outdoor activities, and scenery.
- Canadian visitors have less positive views of Minnesota's outdoor product, possibly because their origin markets are also strong in outdoor, and because shopping tends to be a bigger draw for them. Among these consumers, Minnesota gets its highest marks for having plenty to see and do.

Minnesota is/has…	In-state	Surrounding states	Midwest	Canada	Visitors (total)	Potential visitors
Great parks and trails	4.6	4.3	4.3	4.0	4.4	4.1
Great outdoor activities	4.6	4.3	4.3	3.9	4.4	4.2
First-rate fishing/hunting	4.5	4.3	4.1	3.7	4.3	4.1
Four amazing seasons	4.5	4.2	4.2	3.8	4.3	4.1
Charming small towns	4.5	4.2	4.1	3.8	4.2	4.1
Plenty to see and do	4.5	4.3	4.2	4.1	4.3	4.2
Great options for families with children	4.5	4.3	4.2	3.7	4.3	4.1
Stunning scenery	4.4	4.3	4.2	3.8	4.3	4.1
A relaxing atmosphere	4.4	4.2	4.2	3.9	4.2	4.0
A place I feel welcome	4.4	4.2	4.2	4.0	4.3	4.1
A place for adventure	4.3	4.2	4.1	3.9	4.1	4.0
A good vacation value for the money	4.2	4.1	4.1	3.8	4.1	4.0

Perceptions of Minnesota's City/Culture Product

Destination Benchmarks
>= 4.0 Excellent (top 10%)
3.75 – 3.99 Good (top 25%)
3.5 – 3.749 Average
< 3.5 Below Average

- Outside of Minnesota, there is generally less awareness of the state's sports, culture and heritage, and urban entertainment.
- This is likely a lack of familiarity, and it reinforces that Minnesota's image is much more natural-outdoor-family. The city/culture element may be part of fewer Minnesota trips and therefore is a less pronounced piece of the state's image.
- Next, we will look at details of winter visits.

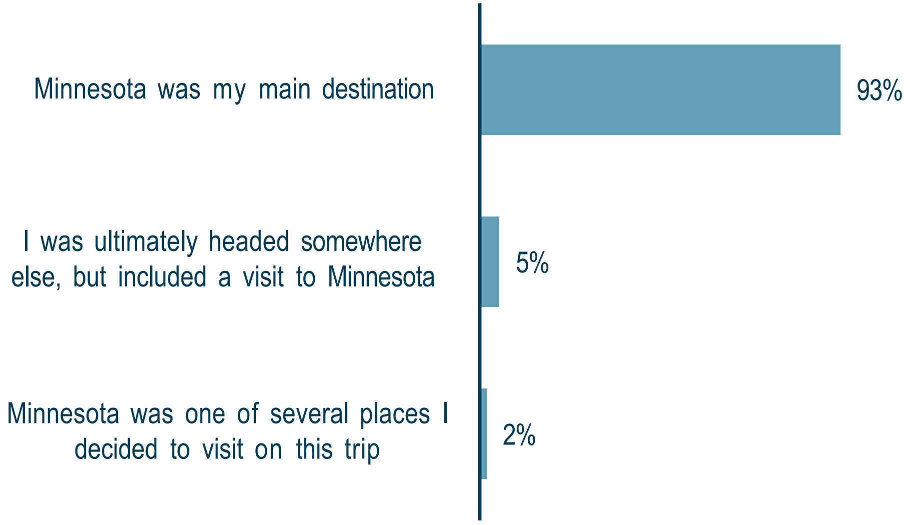
Minnesota is/has…	In-state	Surrounding states	Midwest	Canada	Visitors (total)	Potential visitors
Great opportunities for adult vacations	4.3	4.2	4.1	3.9	4.2	4.0
Great place to live	4.3	3.9	3.9	3.3	4.0	3.8
A fun and exciting place to visit	4.3	4.1	4.1	3.8	4.1	4.0
An exciting spectator sporting events	4.2	4.0	3.9	3.8	4.0	3.8
Place to work	4.2	3.7	3.9	3.2	3.9	3.7
Vibrant cities	4.2	4.1	4.0	3.9	4.1	3.9
Fascinating culture and heritage	4.1	3.8	3.8	3.6	3.9	3.8
An exciting urban entertainment	4.1	4.1	3.9	3.8	4.0	3.9

Trip Profile

Trip specifics data is of trips, not visitors. Many visitors make multiple trips of multiple lengths over the course of the season. The data include 1,245 winter visits.

Main Destination

- As in prior profiles, Minnesota was the main destination for the vast majority of winter visits. Unlike summer trips, which tend to be longer and include road trips to multiple destinations, winter trips are likely to be more focused.
- Just 7% of winter trips are to other places where Minnesota is just a stop along the way. Other places included on these trips were Wisconsin, the Dakotas, and Montana.



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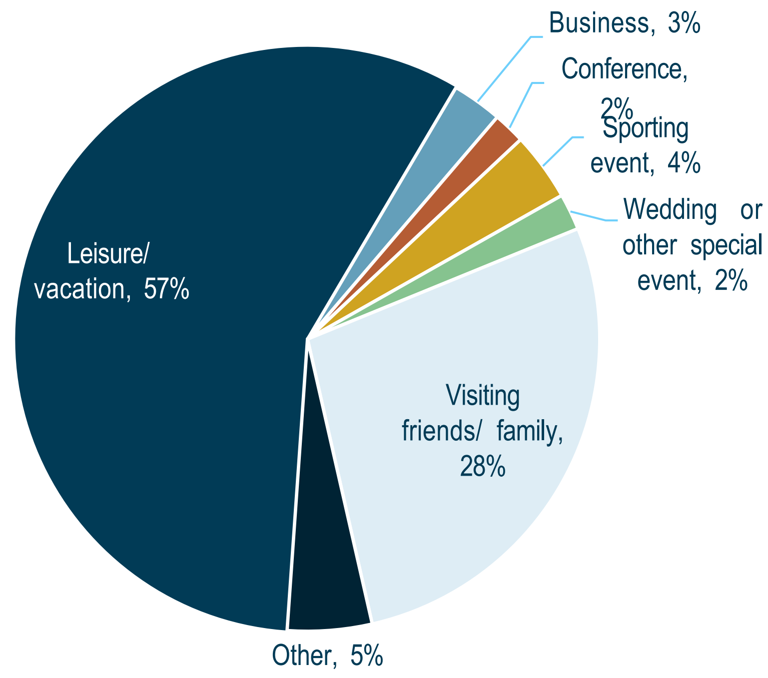
Purpose of Trip

- 85% of winter visits were either for vacation or to visit friends and relatives. This is consistent with what we typically see for Minnesota winter trips.

Was this trip to/within Minnesota primarily for… ?



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Accommodations

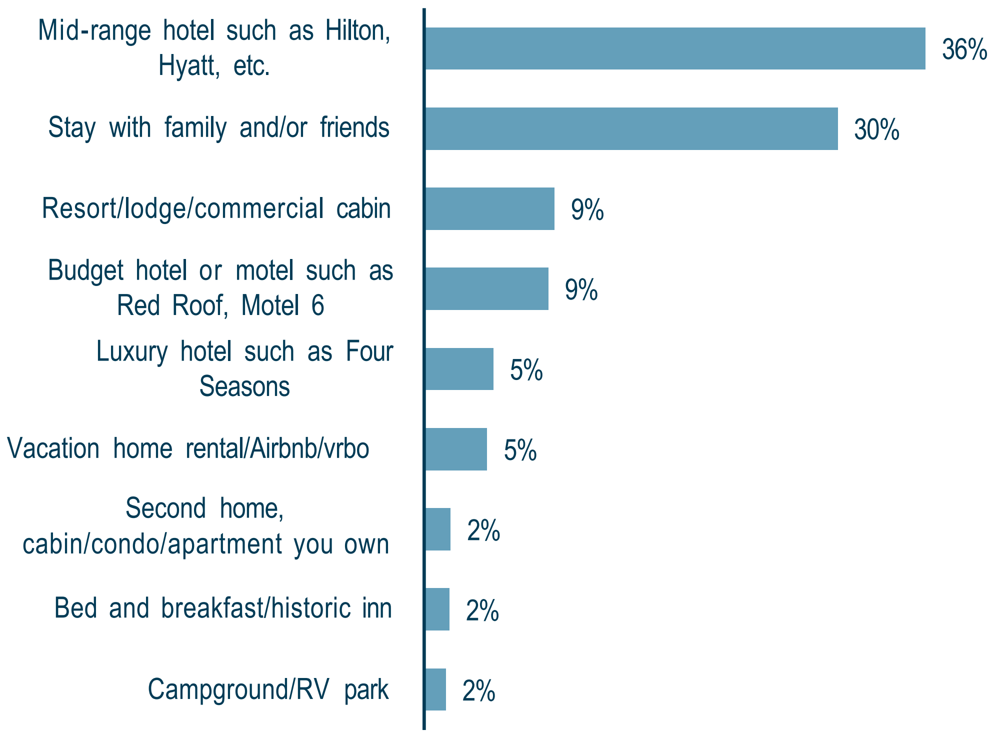
- Winter 2023 lodging patterns look fairly similar to winter 2019.
- There was a slight uptick in hotel stays from the pre-pandemic measure.
- There was also growth in use of paid lodging this year over the prior measure.

Winter Lodging	2019	2023
Hotel	46%	50%
Any paid	63%	68%

Accommodations

- A third of winter visitors stayed in mid-range hotels, which outpaced those who stayed with friends or family.
- Few winter visitors stayed in properties they own.

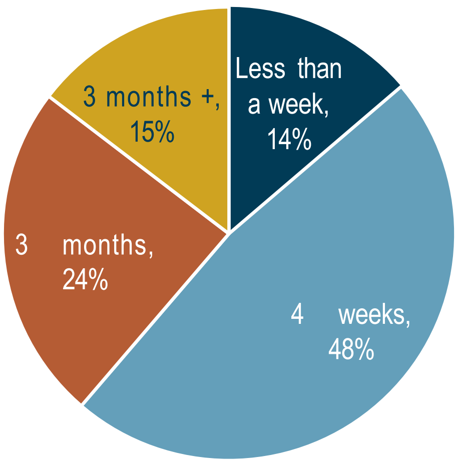
What was the main type of lodging you used while in Minnesota on your trip?



Trip Planning

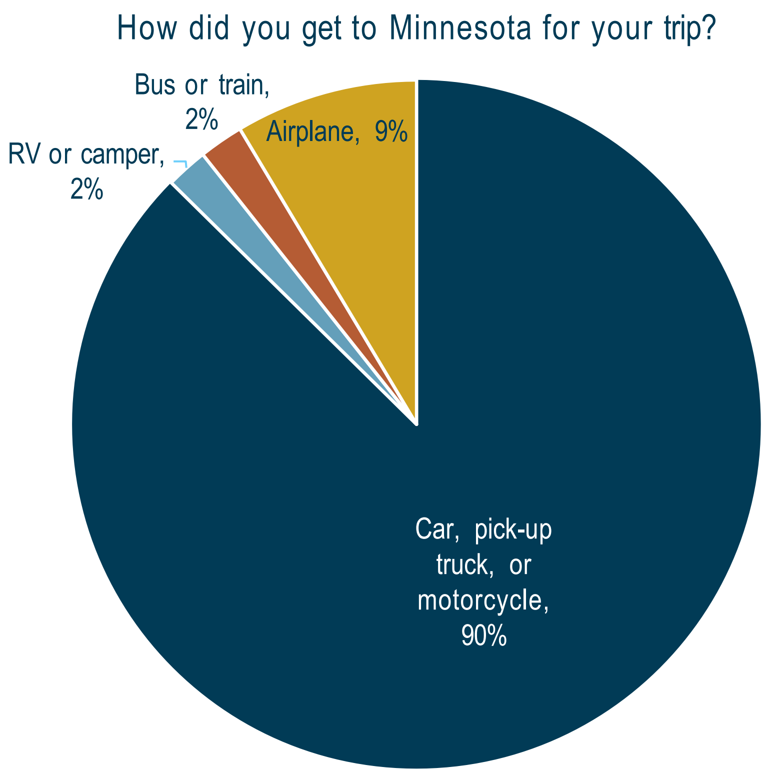
- More than half of winter trips are planned within a month of visiting, nearly identical to the pre-pandemic measure. While planning horizons decreased during the pandemic when some destinations announced travel restrictions and availability was less certain, the planning horizon has returned to a more typical pattern.
- Winter weather can also have a significant impact on how far ahead people plan their holiday trips.

How far ahead of your trip did you choose your MN destination?



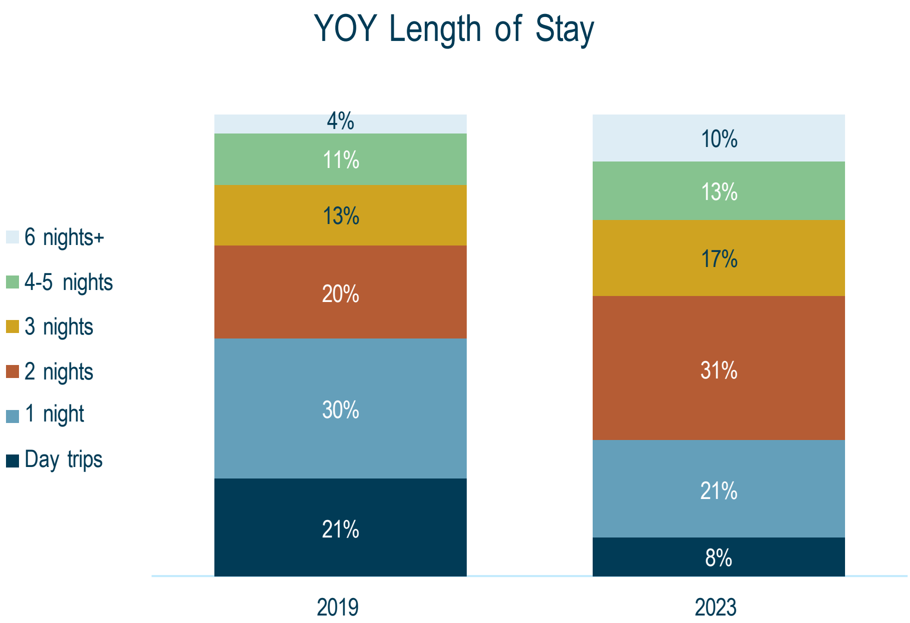
Mode of Transportation

- The vast majority of winter trips take place by personal vehicle; this is identical to the prior measure. Fewer than 10% involve air travel.



Trip Specifics

- Their trips are considerably longer this year than they were pre-pandemic. Data reflects fewer day trips, as well as more week-long stays and more 2-night stays than we saw in the prior measure.
- This metric is broken out by region later in the report.



	Nights in MN	Nights on trip
2019	2.2	2.7
2023	3.6	4.5

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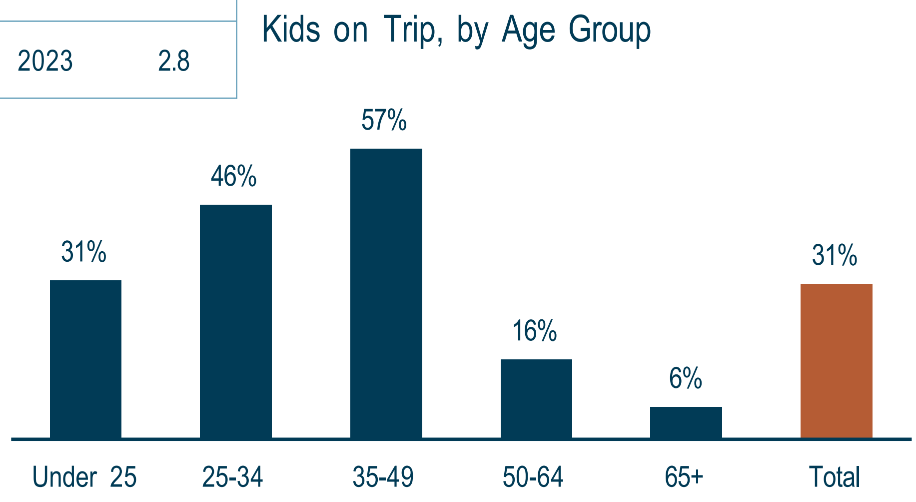
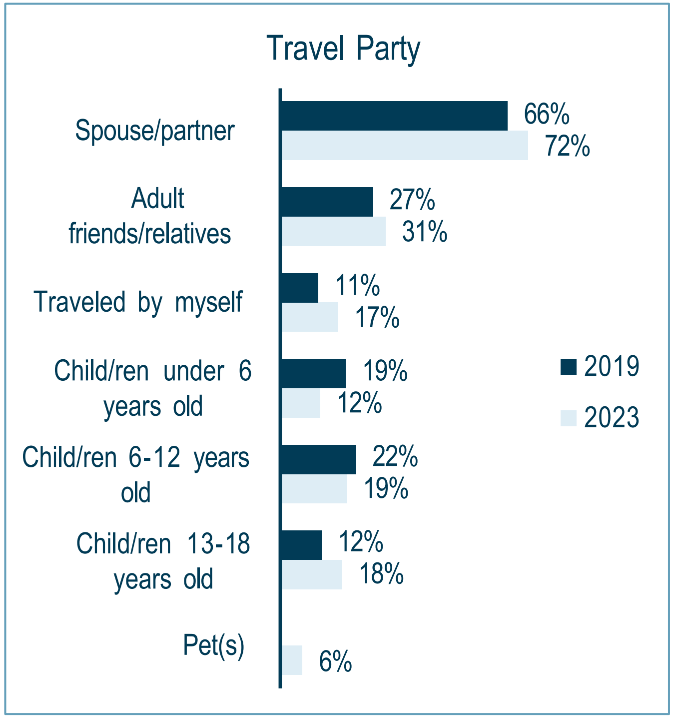
Trip Specifics

Trip specifics data is of trips, not visitors. Many visitors make multiple trips of multiple lengths over the course of the season.

- Travel parties in winter 2023 are similar to 2019.
- Overall, 31% included children under age 18, compared to 37% with kids in 2019.
- A slightly larger share of this winter's trips were solo trips.

Travel party size	
2019	2.7
2023	2.8





Trip Specifics

Trip specifics data is of trips, not visitors. Many visitors make multiple trips of multiple lengths over the course of the season.

- For the most part, trip activities this winter looked very much like they did in the last measure.

Half of trips or more	
Dining out	75%
Shopping	58%

Popular activities/attractions	
Friends or relatives	44%
Sightseeing	39%
Scenic drives	31%
Mall of America	30%
Friends and family for the holidays	22%
Nightlife, concerts and entertainment	22%
Driving on designated scenic byways	20%

Activities/attractions with select appeal	
Hiking/backpacking	19%
Arts and cultural activities	19%
State/national parks	19%
Fairs/festivals/events	18%
Casinos	16%
Wineries/breweries/distilleries	16%
Health and wellness activities	15%
Wildlife/bird watching	14%
Ice fishing	14%
Historical attractions	14%
Museums and galleries	13%
Snowmobiling	13%
Professional sporting events	13%
Downhill skiing/snowboarding	12%
Holiday getaway	11%
Cross-country skiing	10%

Niche activities	
Amateur sporting events/ tournaments	9%
Theater performances	9%
Zoos	8%
Water parks	8%
Camping	7%
Amusement parks/carnivals	7%
Parades and cultural events	6%
Paved trail/road biking	5%
Mountain biking/fat biking	5%
Hunting	4%

Trip Specifics

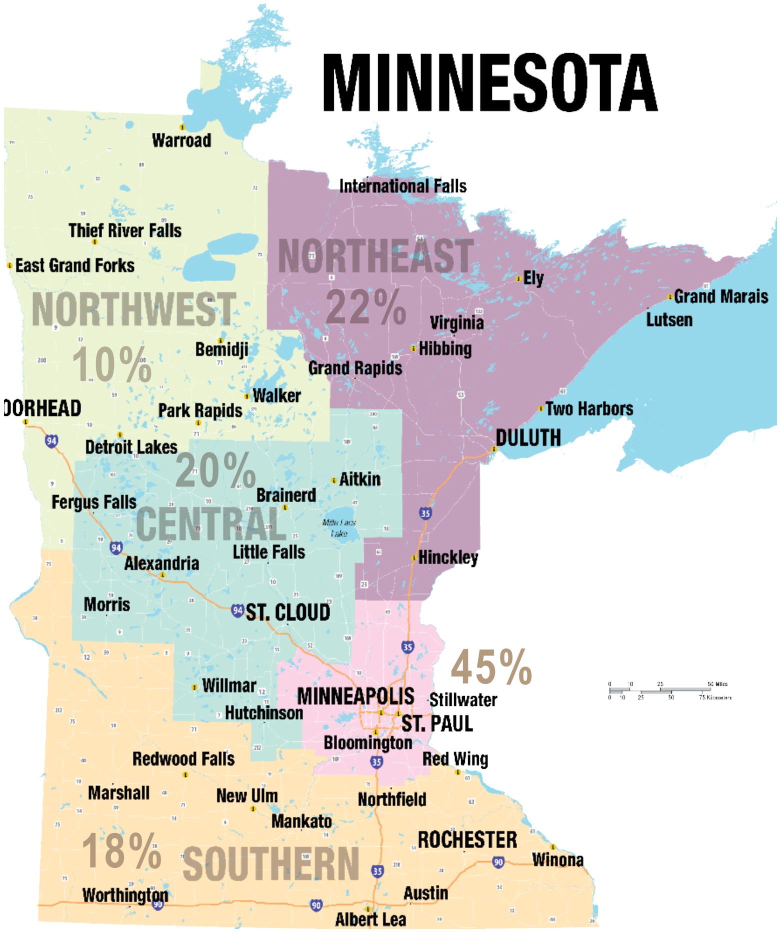
Trip specifics data is of trips, not visitors. Many visitors make multiple trips of multiple lengths over the course of the season.

- Respondents were asked to identify up to five of the listed attractions and activities that motivated them to choose Minnesota as the destination for their winter trip.
- The top winter trip motivator is friends and relatives, as it was in the prior measure. An additional activity was added to this measure, friends and family for the holidays. This is also one of the top 10 motivators.
- Shopping and the Mall of America continue to be among the top winter trip motivators.
- Reflecting EMT's advertising focus, live music and events are also leading trip motivators.

Top 10 Winter Trip Motivators	2019	2023
Visiting friends or relatives	41%	34%
Dining out	25%	24%
Shopping	22%	23%
Mall of America	21%	17%
Friends and family for the holidays	NA	15%
Scenic drives	8%	10%
State/national parks	4%	8%
Nightlife, concerts and entertainment	8%	8%
Professional sporting events	9%	6%
Fairs/festivals/events	8%	5%

Trip Specifics

- Visits to Minneapolis/St. Paul (MSP Metro) made up 45% of winter 2022-23 trips, down from 52% in 2019.
- There is a bump in visits to central and southern Minnesota compared to the last measure.



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Trip Spending

- Average winter trip spending is $761, up from just over $400 per travel party in 2019.
- Overnight stays in paid lodging are somewhat higher.
- Trips to visit friends and family and day trips have lower overall spending.

	Total	Overnight, pd lodging	Day trips	Visit friends & relatives
Lodging and camping accommodations	$242	$265	$0	$138
Food and beverages, including groceries	$174	$184	$63	$132
Arts & culture such as museums, historic sites, etc.	$31	$33	$4	$13
Recreational fees, rentals, equipment, etc.	$33	$36	$1	$15
Sporting events	$24	$27	$0	$9
Other events, entertainment and attractions	$48	$51	$15	$23
Shopping – tourist (gifts, souvenirs, antiques, arts and crafts)	$67	$72	$12	$42
Shopping – general (clothing, personal or household items)	$75	$78	$45	$60
Transportation within Minnesota (car rental, car sharing, fuel, etc.)	$67	$71	$20	$49
Other	$0	$0	$0	$0
TOTAL	**$761**	**$818**	**$160**	**$482**

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Trip Specifics

- Factoring in travel party size and length of stay, winter visits bring in an average of $74 per person per day, up from $68 per person per day in 2019.
- Per person per day spending for visiting friends and relatives is up over the last measure, while overnight and day trips are both lower than in 2019. A number of variables impact this, including lodging costs, the economy, as well as shifts in priorities among travelers since the pandemic.

Spending by trip type	TOTAL	Overnight, pd lodging	Day trips	Visit friends & relatives
TOTAL spending	$761	$805	$160	$482
Travel party	2.8	2.9	2.5	2.4
Length of stay (nights)	3.6	4.0	0	3.7
Spending per person/day	**$74**	**$72**	**$63**	**$55**
2019 spending per person/day	$68	$113	$79	$40

First-time vs. Repeat Visitors

- Nearly 20% of winter visitors were first-time visitors, up from just 9% in 2019.
- Including a broader geography in the research likely helped to include more of those who had not experienced Minnesota before.
- More than a quarter of those who visited from the Midwest this winter were first-time visitors.

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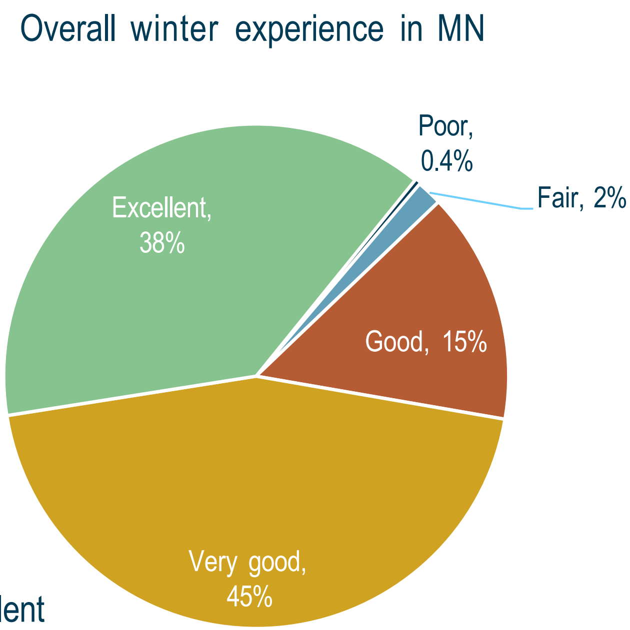
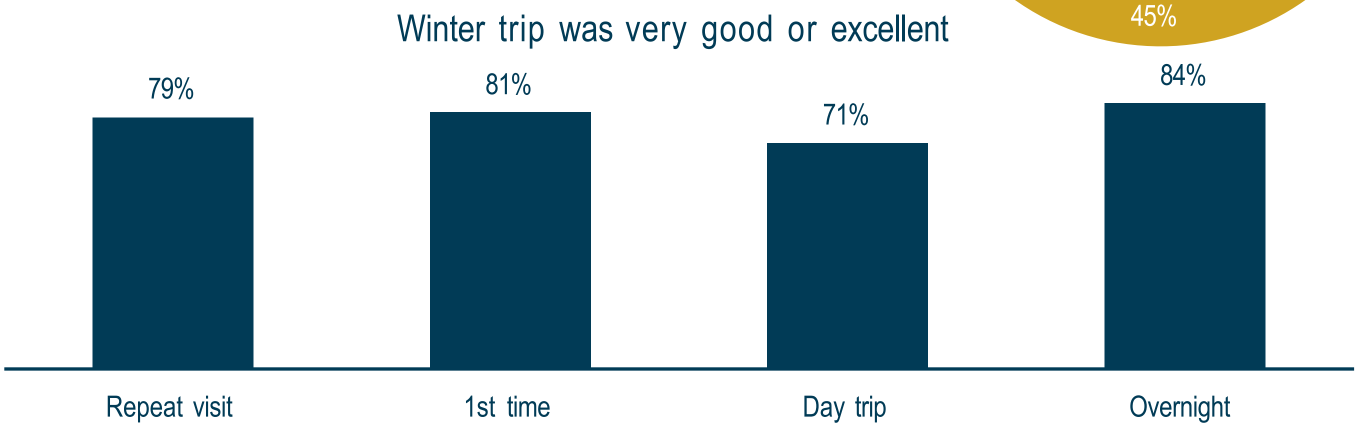
Visitor Satisfaction

- Overall, 83% of winter visits are rated as excellent or very good. There is very little negative response to a winter trip.
- In general, overnight visitors are more positive than day trippers.
- There's little difference between repeat and first-time visitors.





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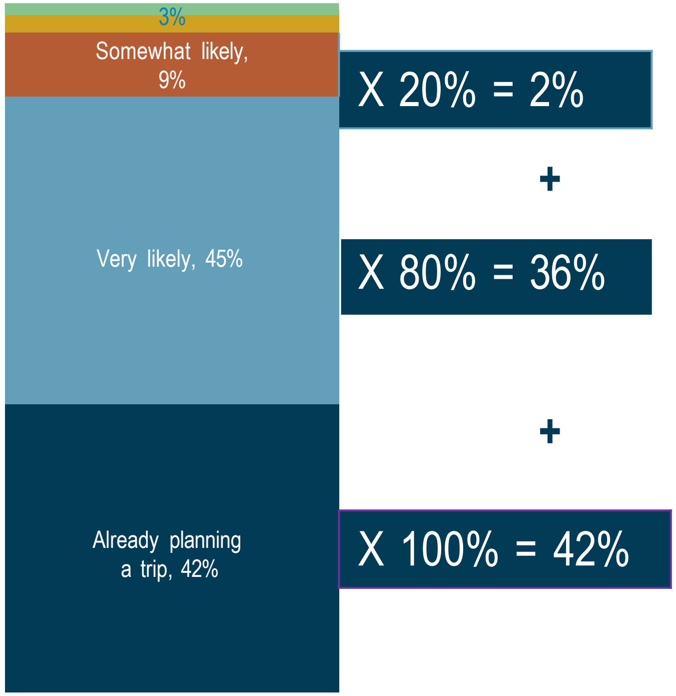
Intent for Return Visit

- Visit intent among winter visitors is 80%. This high level of intent to return is consistent with a high level of trip satisfaction.
- SMARInsights uses a calculation for visit intent that estimates that 100% of those already planning a trip, 80% of those very likely to visit, and 20% of those somewhat likely to visit will actually visit the state.
- This formula allows us to express future visit intent in a single number.

Likelihood to visit Minnesota in the next year



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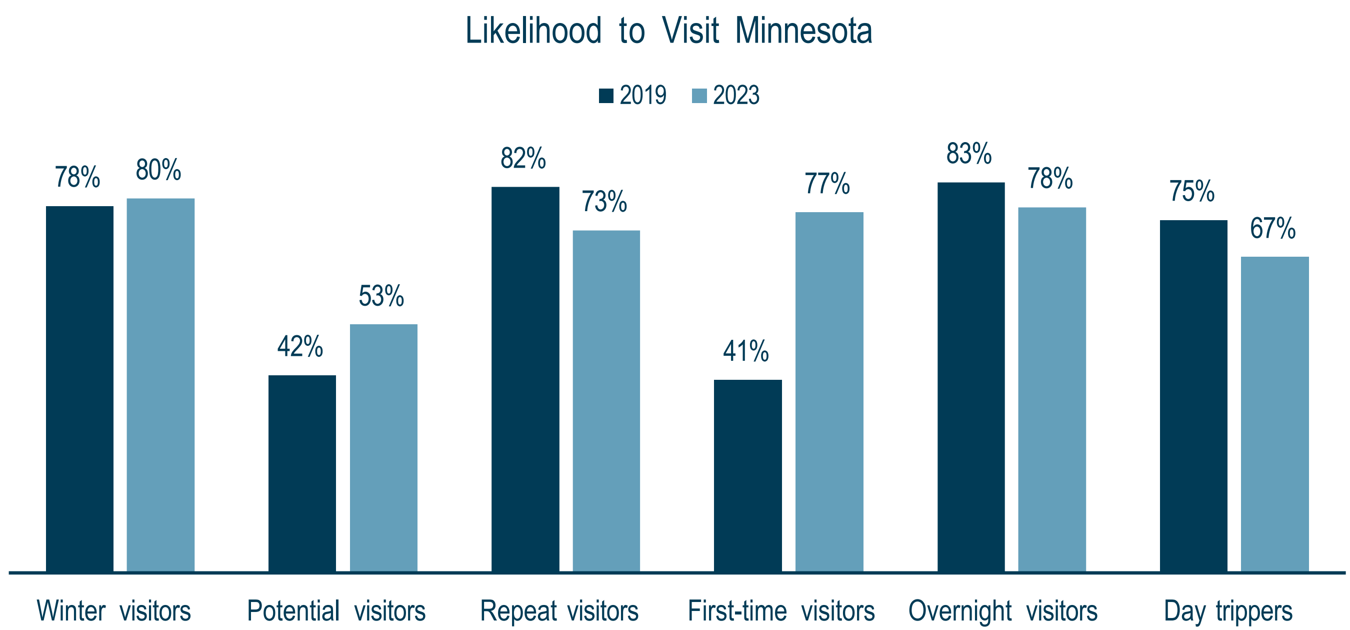
Visit Intent

- Compared to the last measure, potential visitors have a higher likelihood to visit the state within the next year. First-time visitors are also significantly more likely to visit than in the 2019 measure.



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