



Explore Minnesota Consumer Travel Sentiment Survey - June 9-12, 2020



Overview and High-Level Summary



Explore Minnesota recently surveyed a sample of subscribers to its monthly travel e-newsletter about their plans and attitudes regarding travel. While national consumer studies have revealed significant and evolving attitudes about travel, this survey allowed Explore Minnesota to gain a better understanding specifically among a group of Minnesota-oriented travelers. Topics included recent and upcoming leisure travel plans in 2020, assurances needed to instill confidence for travel, current motivators for leisure travel and impacts of recent civil unrest on perceptions of Minnesota as a travel destination.

Survey results reflected pent-up demand to get out and travel, tempered by concerns about safety related to travel. Among respondents, 62.5% plan to take at least one summer trip. When thinking about their next leisure trip, some of the respondents' highest ratings reflected longings to get back to times when they feel more free to travel. "I always take a summer trip" got the highest ratings, followed by three sentiments that touched on freedom and nostalgia for more normal times.

Most respondents reflected concern around the health risks of travel in their responses, including refusal by some to travel in the foreseeable future, or requiring assurances that their travel surroundings would be sanitized and they would be able to maintain social distance at their destination. By contrast, responses and comments by a smaller number of respondents indicated no need for concern about COVID-19, with some expressing defiance about restrictions that have limited

their choices around travel – choices they think they should have been able to make for themselves all along.

"Outdoor experiences" and visiting friends and family received the highest ratings for providing motivation to take a summer trip, from among 13 activities. On the other end of the motivational spectrum were experiences offering less opportunity for distancing, like sports events, live concerts and night clubs, and (other) urban experiences.

A recent police killing of a Black man in Minneapolis, and associated civil unrest, impacted how some respondents look at Minnesota as a place to visit. However, the majority of respondents were either not impacted or were not impacted much by those events. That said, respondents' comments offered a glimpse into serious reservations by some, relating to recent violence, along with safety concerns stemming from news coverage of a defunded police force.

The majority of respondents were Minnesota residents, reflecting the travel e-newsletter subscriber list that was sampled for the survey. Respondents were disproportionately older, retired, and more likely to live in households without children, compared with the general population and travelers overall. It is good to keep these characteristics in mind when looking at survey results.

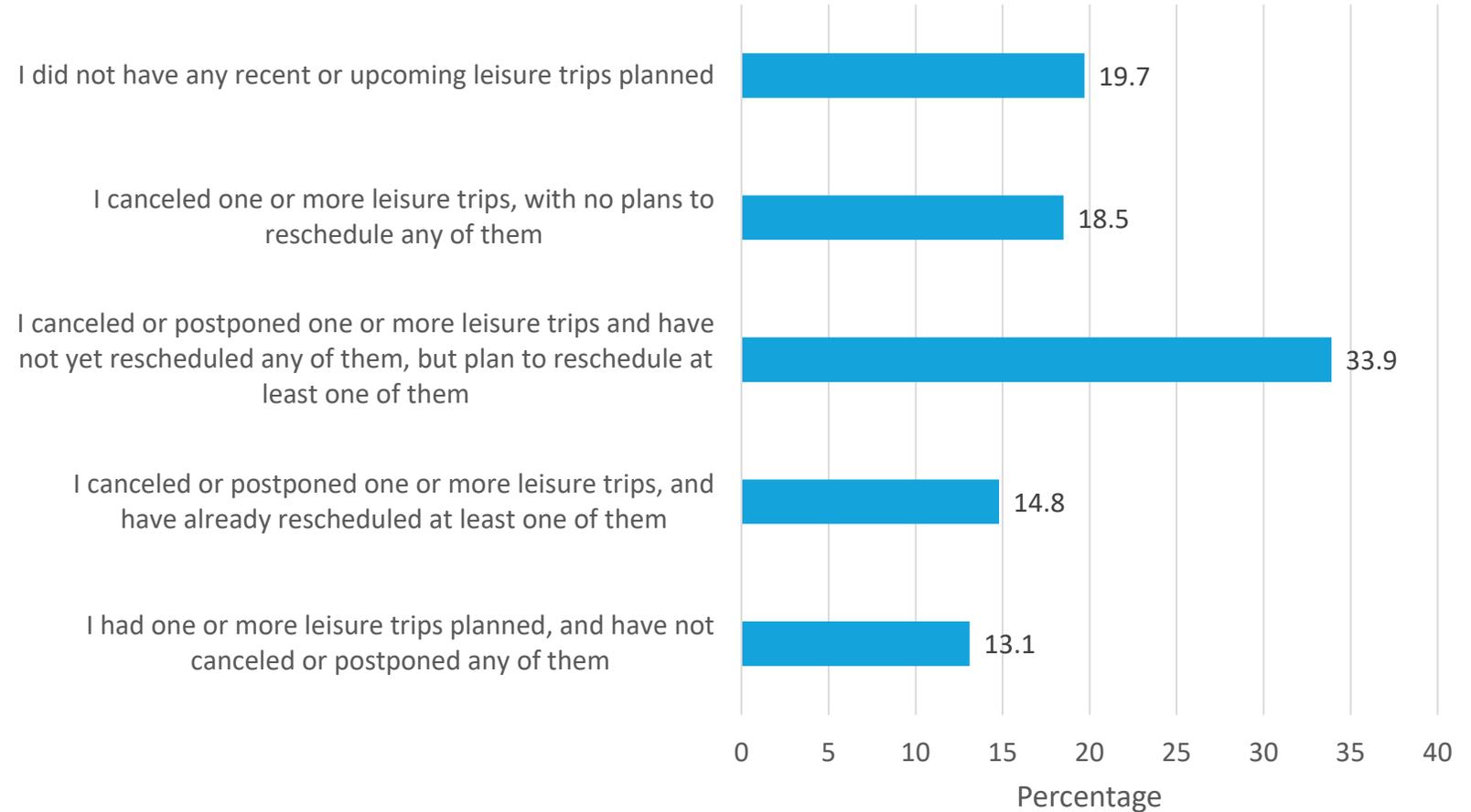
Survey responses will help Explore Minnesota determine how to best serve potential visitors, and what sort of travel information is relevant during these challenging times.

Leisure Travel Status and Plans

Status of leisure travel in the COVID era

- Two thirds of respondents (67%) had canceled or postponed one or more leisure trips since the onset of coronavirus-related restrictions.
- Among those who had canceled or postponed trips, half (34% of *all* respondents) had not yet rescheduled any of them but planned to reschedule at least one, while just under a quarter (15% of *all* respondents) had already rescheduled at least one trip and just over a quarter (18.5% of *all* respondents) had no plans to reschedule any of them.

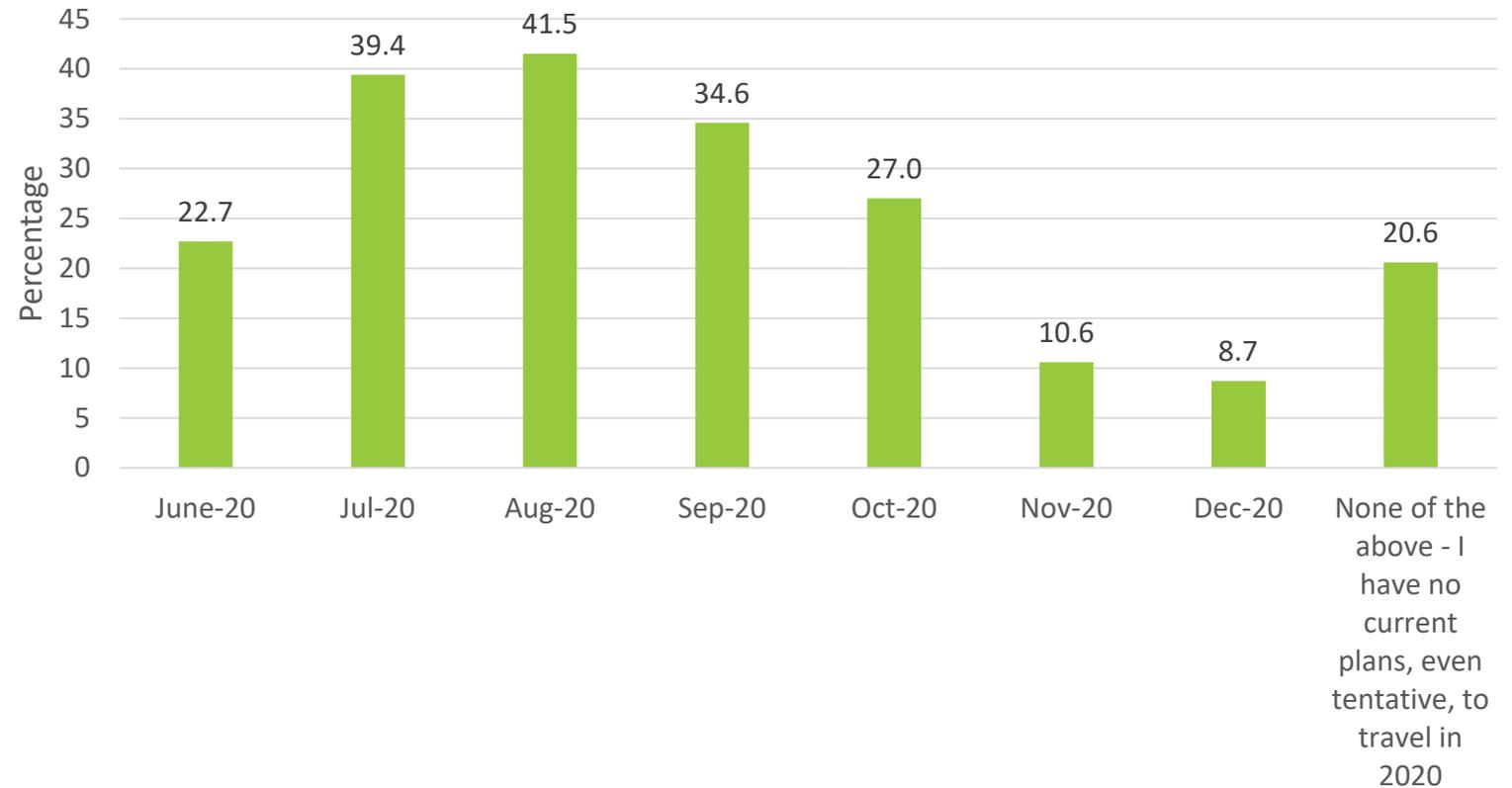
Which of the following best describes the status of your leisure travel since the onset of coronavirus-related restrictions?



Timing of upcoming 2020 leisure trip(s)

- 62.5% of respondents indicated that they have at least tentative plans to take a summer leisure trip, with many planning trips in multiple summer months. (Percentages displayed in the graph are not additive, due to trips in multiple months for some respondents.)
- Also, 50% of respondents indicated that they have at least tentative plans for fall travel in September through November.

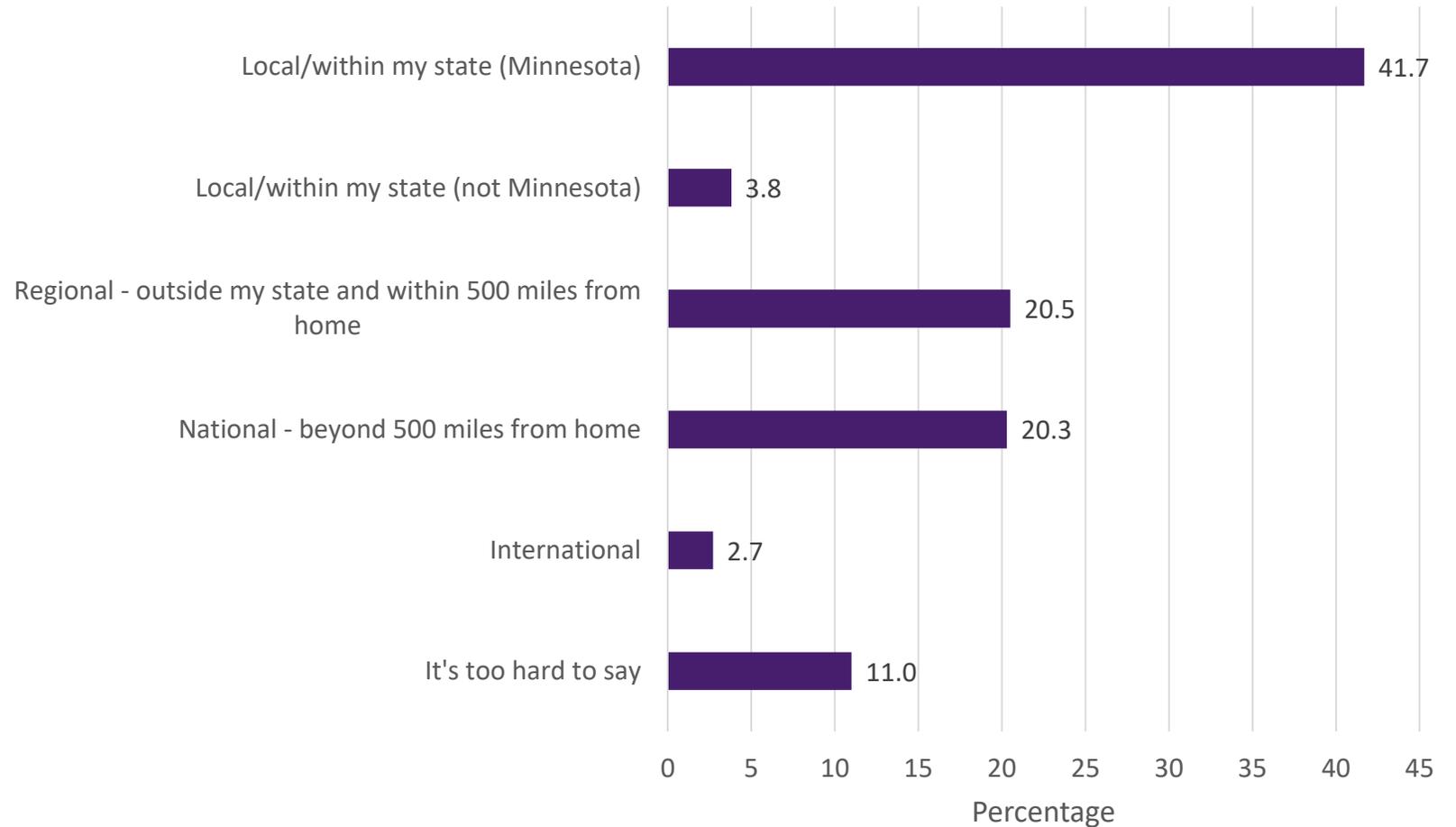
Even if only tentatively scheduled, in which months of this year do you currently plan to take any leisure trips? (Select all that apply.)



Destination of next trip

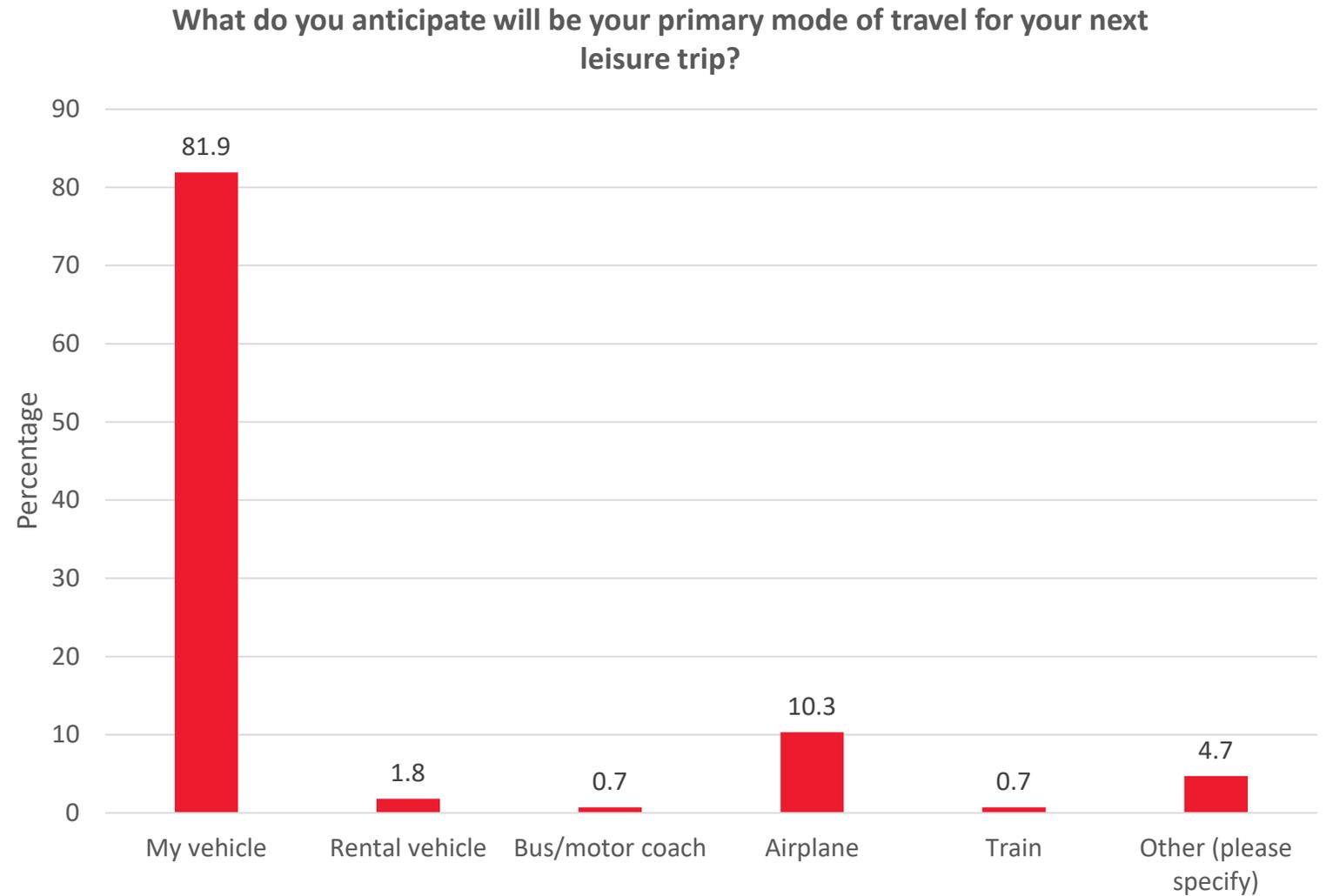
- Only 23% of respondents indicated that the destination of their next trip will be beyond 500 miles from home (20%) or international (3%).
- Nearly two thirds (66%) of respondents' next destination is closer to home, including 45.5% local/in state and 20.5% regional within 500 miles from home.

What do you think will be the destination of your next leisure trip?



Road trips are dominant during the pandemic

- Even in normal times, road trips get most Midwest visitors to their destinations. In the era of COVID and safety concerns around flying, road travel overshadowed air travel by a factor of nine to one for the mode of travel of respondents' next trip.
- 82% of respondents said they will use their own vehicle. Among the 5% of respondents who checked "other," nearly all indicated a road vehicle, with the most common ones being motorcycle (1%) and RV/motor home (1%).

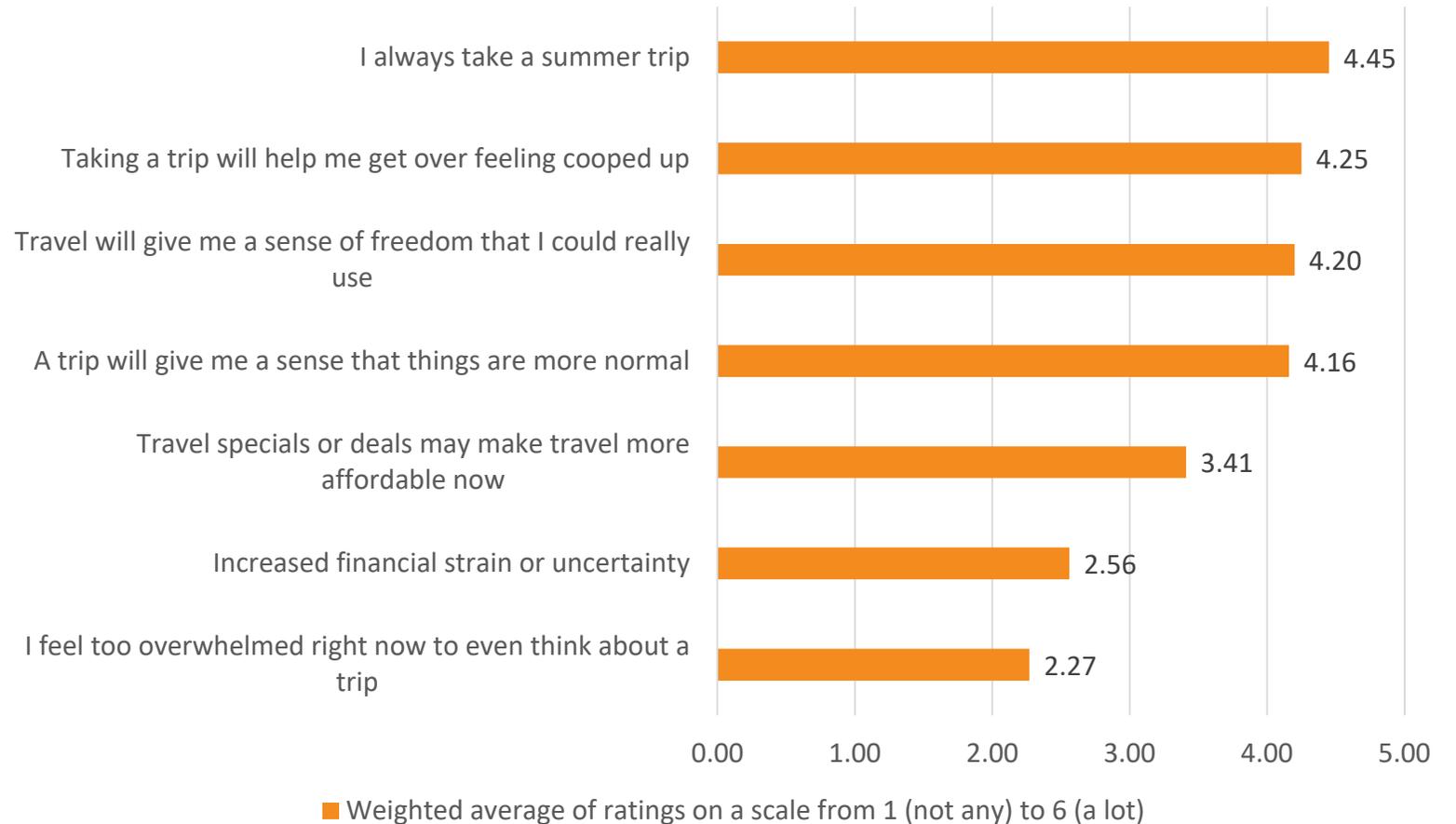


Considerations for Travel: Sentiments, Confidence and Safety

Pent-up demand for travel

- When thinking about their next leisure trip, some of the respondents' highest ratings reflected longings for travel in more normal times. "I always take a summer trip" got the highest ratings, followed by three sentiments that touched on freedom and nostalgia for normal times.
- Even though the current era is fraught with challenges around health, jobs and finances, respondents gave low ratings to sentiments of feeling too overwhelmed and being burdened by increased financial strain or uncertainty, as they thought about their next trip.

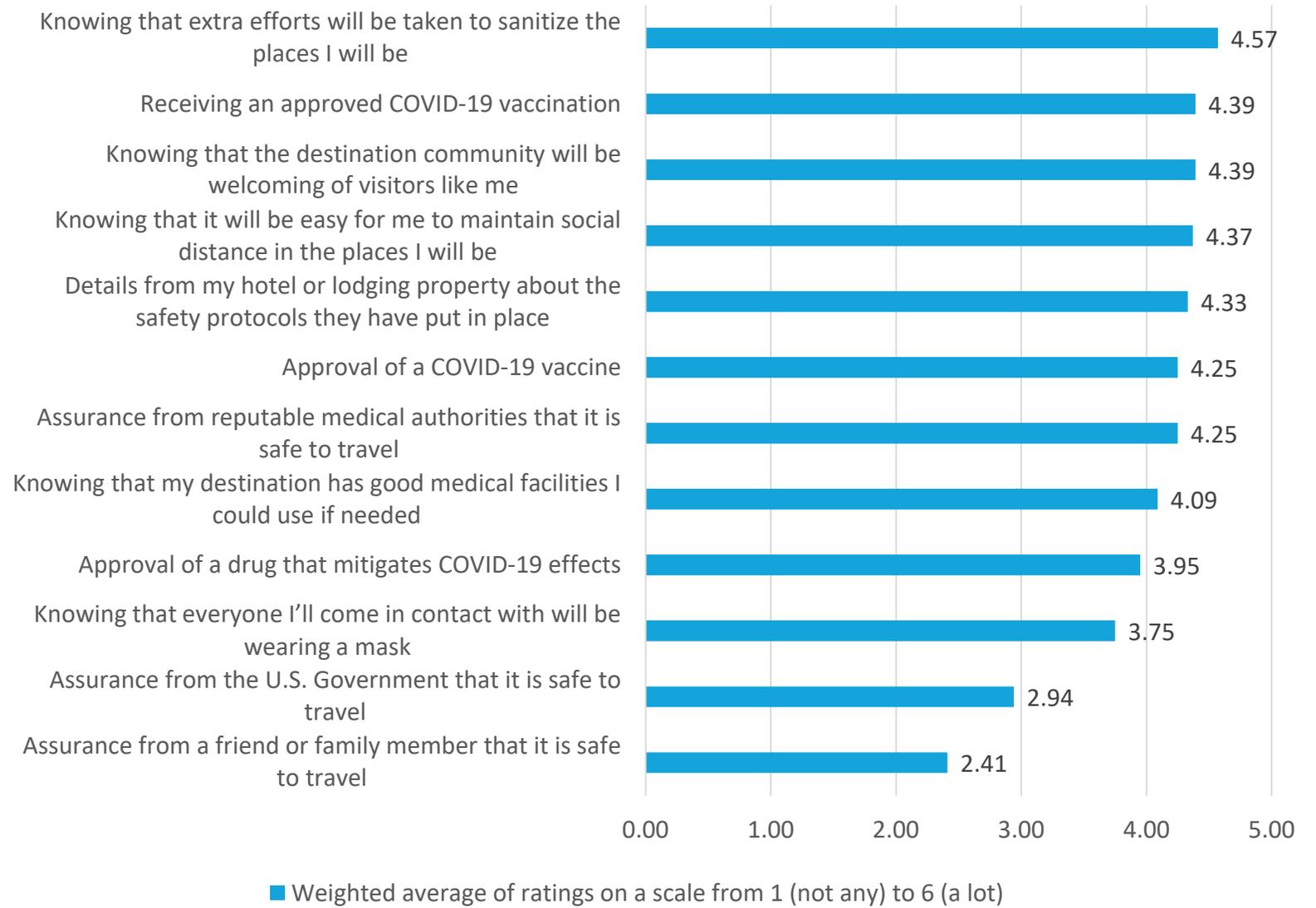
As you think about your next leisure trip, how much does each of the following apply to the way you are thinking and feeling about that trip?



The health and safety considerations that instill confidence for travel

- At a time when health and safety are paramount, it follows that measures that allow consumers to feel in control of their own health and safety will instill in them the greatest confidence for travel. Little differentiation can be found among the majority of measures that were rated.
- That said, one measure stood out with the highest ratings – “knowing that extra efforts will be taken to sanitize the places I will be.”
- Respondents provided high ratings for confidence instilled by vaccines, knowing that their destination would be welcoming of visitors and would make it easy to maintain social distance, and having details from their lodging property about safety protocols they have in place.
- On the other end of this spectrum, respondents’ confidence would not be bolstered by assurances of travel safety from friends or family or from the U.S. Government.

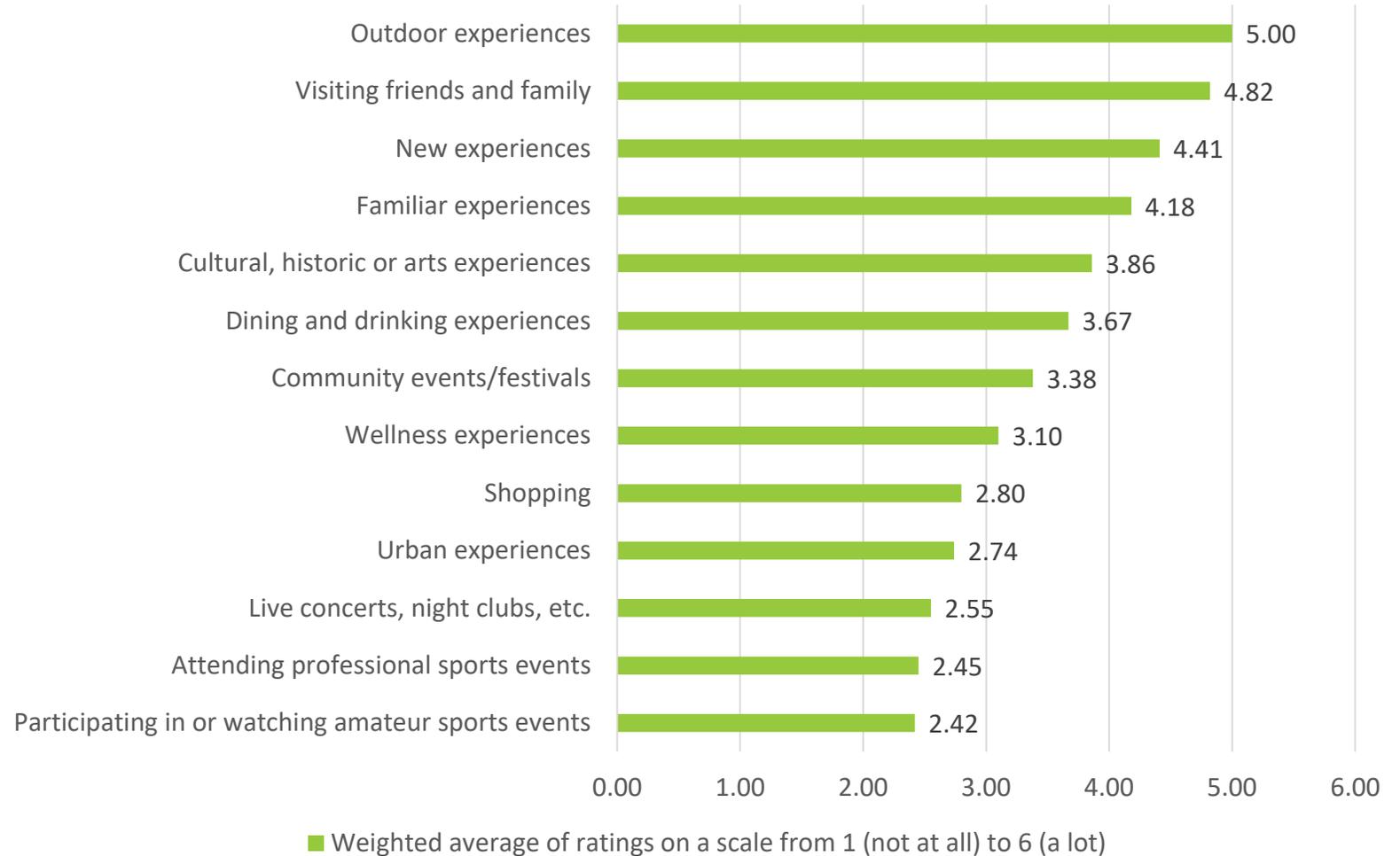
How much would each of the following instill confidence in you for travel?



Motivators for summer overnight leisure trips

- “Outdoor experiences” was the highest rated motivator for summer travel. While outdoor experiences are important in normal times, the opportunities they offer for social distancing have elevated their desirability during COVID times.
- Visiting friends and family received the second highest rating among travel motivators. As with outdoor experiences, visiting friends and family is typically a strong motivator for travel, and one that is likely enhanced by current safety measures that keep people isolated in the name of public health.
- Interestingly, both new experiences and familiar experiences also rated high as travel motivators. This may indicate a desire for both the safety offered by familiarity as well as a longing to try something new, following long stays at home and social isolation that have afforded little excitement for many.
- On the other end of the motivational spectrum were experiences offering less opportunity for distancing like sports events, live concerts and night clubs, and (other) urban experiences.

For this question, please assume that conditions reach a point where you feel safe taking an overnight leisure trip this summer. How much would each of the following motivate you to take that trip?

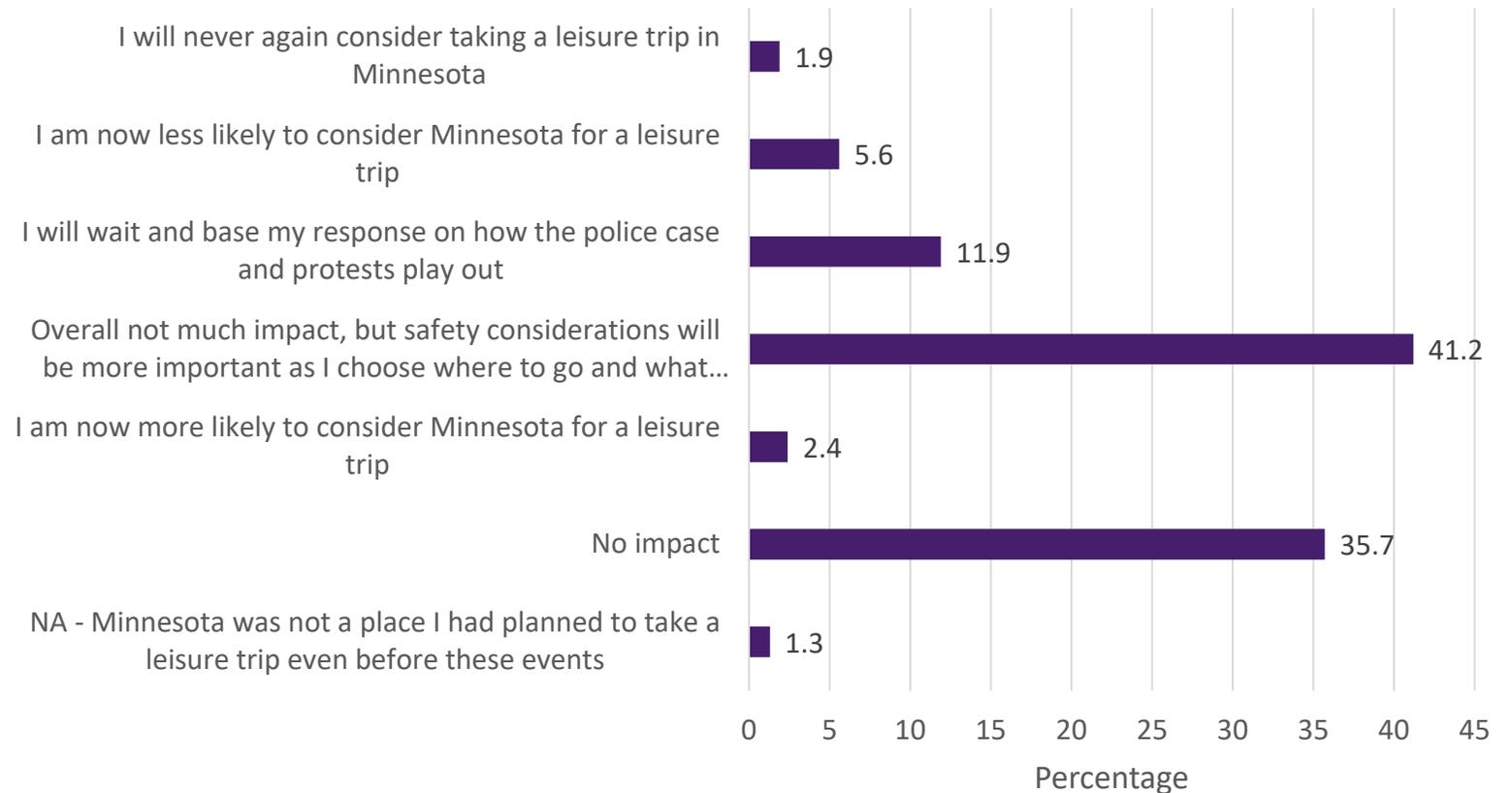


Perceptions of Minnesota During a Time of Civil Unrest

Impacts of recent events on potential visitors

- More than a third of survey respondents (36%) stated that recent events have no impact on their perception of Minnesota as a travel destination, and another 41% noted that the civil unrest did not have much impact, but safety considerations will be more important as they choose where to go and what to do in Minnesota.
- Relatively small portions of respondents are either less likely to consider Minnesota for a leisure trip (6%) or will never again consider taking a leisure trip in Minnesota (2%). 12% are taking a wait and see approach, waiting to base their response on how the police case and protests play out.
- More than 2% of respondents indicated that they are now more likely to consider Minnesota for a leisure trip.

An increasing number of destinations are experiencing protests as a result of the police killing of a Black man, George Floyd, in Minneapolis. Which of the following best reflects how these events impact how you look at Minnesota as a place to take a leis



Thoughts on what your future leisure travel will look like

Open-ended question: “In a few words, how do you anticipate your future leisure travel will be similar to or different from your previous travel?”

- Responses to this question reinforced themes regarding safety concerns about future travel. Some respondents commented that they anticipate their future travel experiences will never be the same as they were before the pandemic.
- Many respondents expressed the need for control over their environment, with an emphasis on being able to do whatever they needed in order to protect themselves from the possibility of being exposed to the coronavirus. This sentiment was reflected in preferences for outdoor spaces and activities, driving instead of flying and camping/staying in their RV instead of staying in hotels. Some respondents will only be taking day trips for the foreseeable future.
- In this same vein, many responses reflected concern about others not sharing their level of interest in observing safety protocols, which in turn would shape their choice of destinations and activities to ones that would minimize the number of people and unforeseen circumstances they would encounter. A few respondents noted that the limitations and anxiety surrounding all of this would diminish their enjoyment to the point where travel wasn't worth the effort and expense at all until things change in a way that leaves them feeling safer.
- Commonly mentioned safety concerns were represented well in this comment: “I didn't worry about safety overall before; now I do all the time. I don't trust people who don't take this seriously. Too many with no masks, no distance, crowded.”
- Numerous responses addressed safety concerns surrounding recent civil unrest that has been focused in and on Minneapolis. (Note: The open-ended question followed immediately after the survey question about perception shifts related to that civil unrest.) Some respondents expressed reluctance or refusal to visit areas where they would not feel safe, sometimes mentioning Minneapolis or the metro, with many of these comments specifically noting the defunding of police. “I will be avoiding Minneapolis until they figure out how they are going to protect the public.”
- A number of responses reflected sentiments that COVID concerns and travel restrictions are overblown and/or unnecessary. Some of these responses included defiant statements related to (not) wearing masks and/or not altering travel plans at all. “I feel it is stupid for us to have to wear face masks while flying.”
- A common theme among responses was a yearning for travel to return to what it was in the past. People are clearly missing travel experiences they had become accustomed to.

Methodology; Characteristics of Survey Respondents

Survey methodology, sample and response rate



- The survey utilized SurveyMonkey, a commercially available online survey package.
- A sample of 20,000 subscribers was randomly selected from Explore Minnesota's monthly travel e-newsletter subscriber list.
- Sample members were sent an email invitation to take the survey on Tuesday, June 9, with a deadline of Friday, June 12. A reminder email invitation was sent on Thursday, June 11.
- The survey received 1,371 responses, for a 6.9% response rate.

Home state or country; Metro versus greater Minnesota

- Given that the survey sample was selected from the population of Explore Minnesota's travel e-newsletter subscribers, the high incidence of respondents from Minnesota (73%) and other Midwestern states was not surprising.
- Among the 2% of respondents from other countries, Canada (1%) was the only country with more than three mentions.
- 40% of all respondents live in the Minneapolis-St. Paul metro area, and 32% live in greater Minnesota.

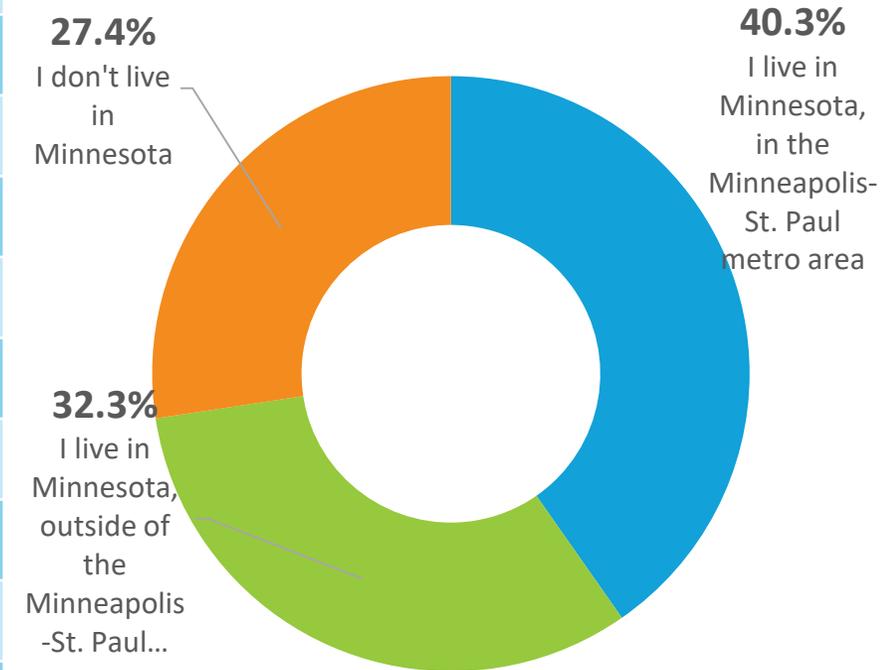
Which U.S. state do you live in?

| Answer Choices | Responses |
|----------------|-----------|
| Minnesota | 72.7% |
| Wisconsin | 3.7% |
| Illinois | 2.9% |
| Iowa | 2.9% |
| North Dakota | 1.5% |
| Missouri | 1.2% |
| South Dakota | 1.0% |
| Texas | 1.0% |
| Arizona | 1.0% |
| Florida | 1.0% |
| California | 0.8% |
| Indiana | 0.8% |
| Michigan | 0.7% |

If you live outside of the U.S., what country do you live in?

| Answer Choices | Responses |
|------------------|-----------|
| Other U.S. state | 6.9% |
| Other country | 2.1% |

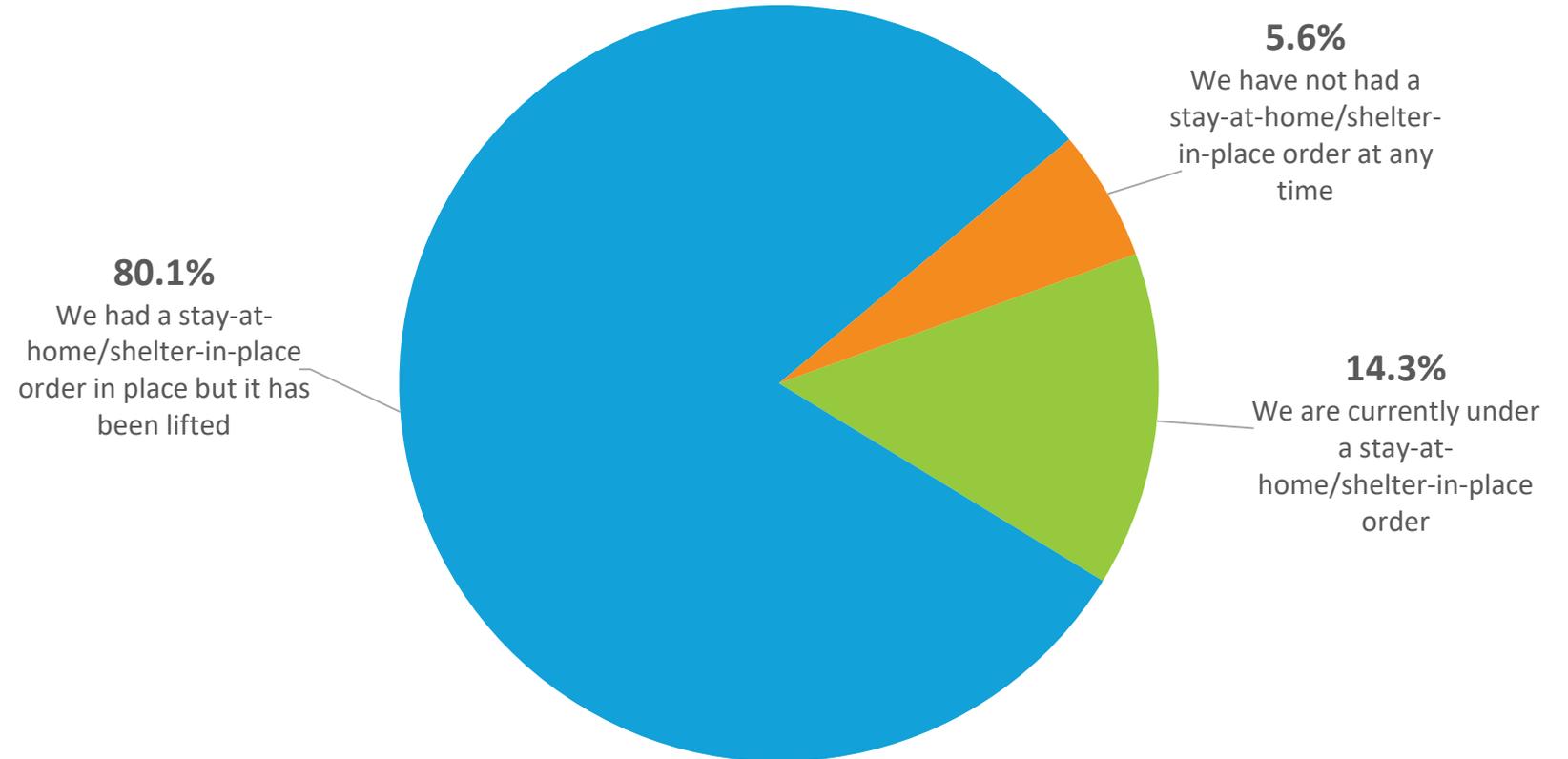
Which of the following describes where you live?



Stay-at-home/shelter-in-place status

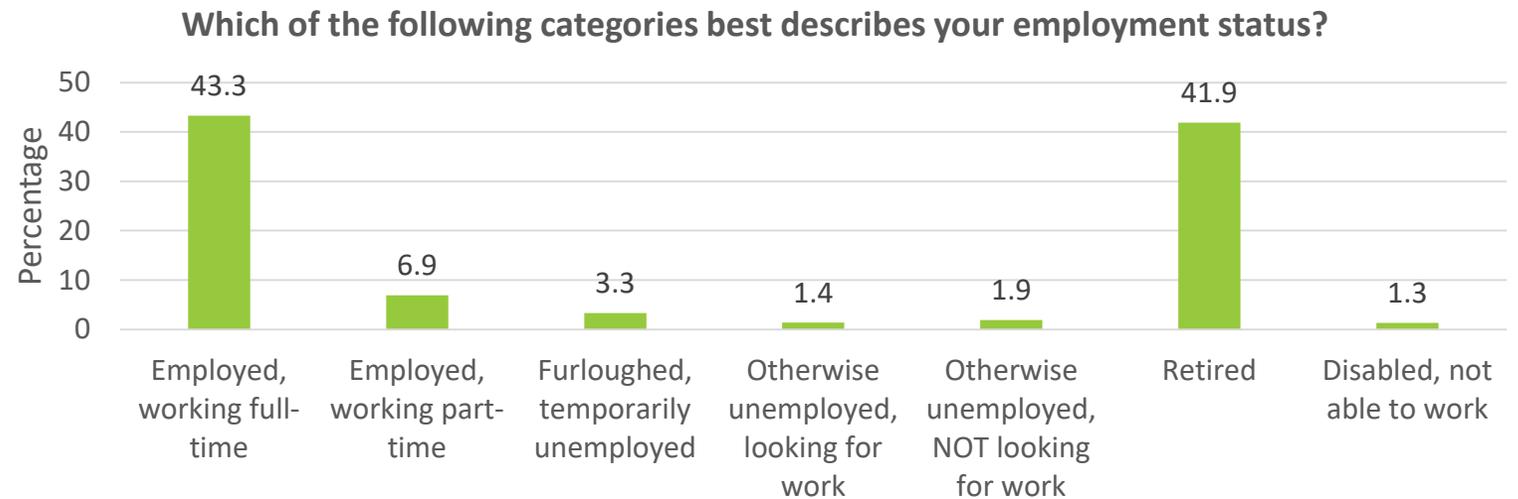
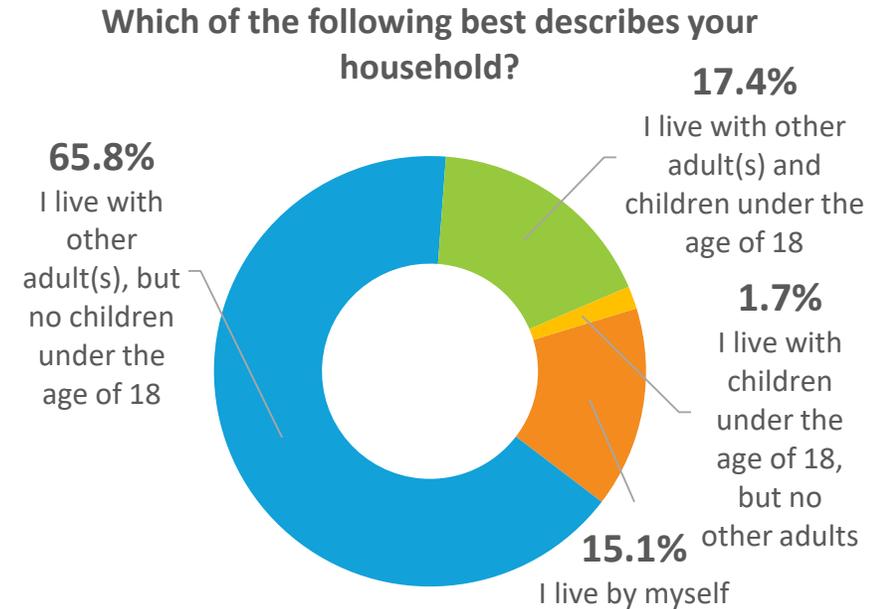
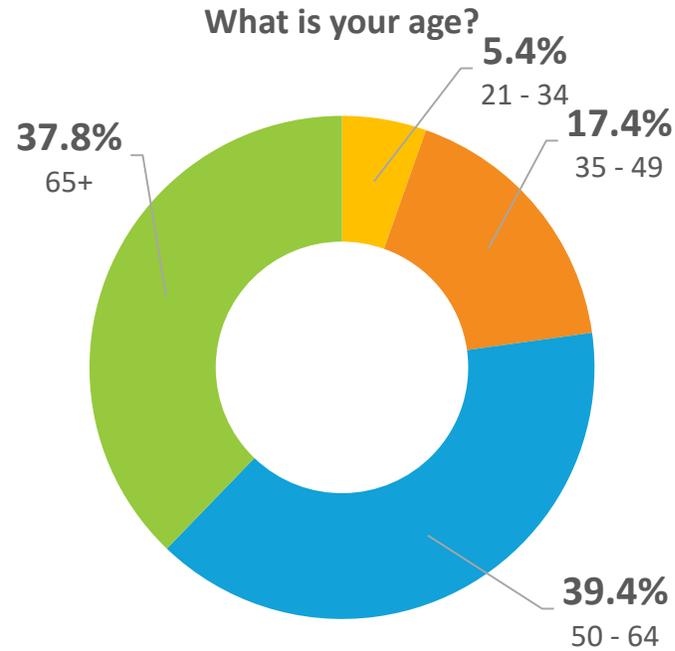
- The vast majority of respondents (80%) live in areas that previously had a stay-at-home/shelter-in-place order that has been lifted.
- Another 14% of respondents live in an area that is currently under a stay-at-home/shelter-in-place order.

What is the status of the area where you live?



Age, employment status and household type

- Compared with the population overall and travelers, respondents to this survey were disproportionately older (77% aged 50+), more likely to be retired (42%) and more likely to live in households without children (81%).
- It is worth considering these characteristics and their possible implications for results to some survey questions. For example, because of the correlation between age and the severity of COVID-19 symptoms, survey responses and results may skew toward response options that favor safety.





THANK YOU