2023 Spring-Summer Traveler Profile

October 2023

SMARInsights

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
  - the visitor journey from potential visitor to new visitor to repeat visitor
  - visitor and potential visitor perceptions of the state and their awareness of what Minnesota offers

Methodology

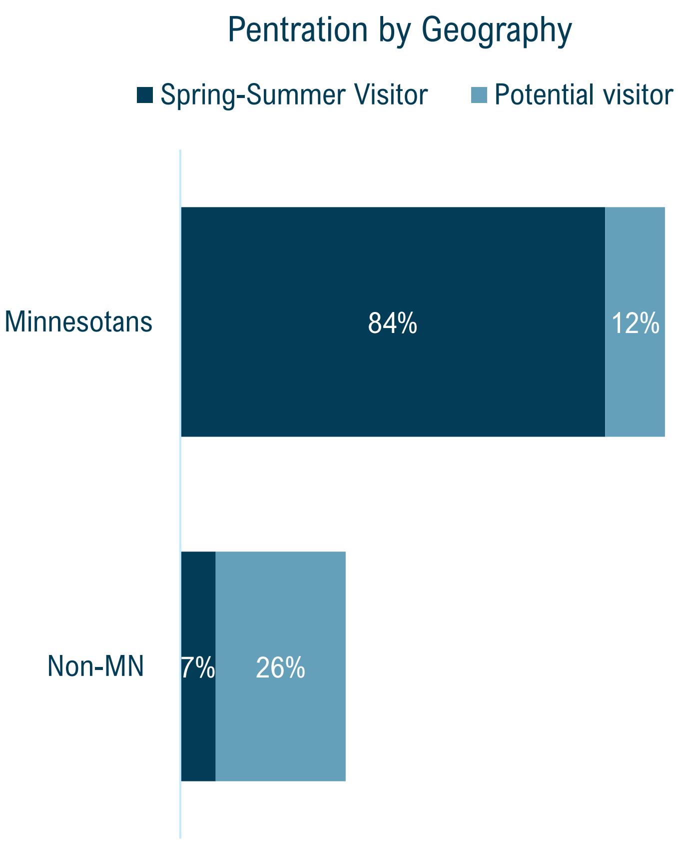
- As in the 2019 visitor profile, respondents were screened to ensure they were at least 21 years old, regularly take leisure trips, and were travel decision makers for their households.
- Spring-summer visitors were screened to ensure they had visited Minnesota (or, if residents, traveled in-state at least 50 miles from home or for an overnight leisure trip) from April to August 2023. Because many visitors took multiple trips, data was gathered on 2,020 spring-summer trips from 1,201 visitors.
- A total of 496 potential visitors were also surveyed; these respondents were screened to ensure they had not visited Minnesota recently, had some level of familiarity with Minnesota, and some degree of likelihood to visit in the next year.
- Visitor data has been weighted to the Datafy origin market distribution. Potential visitor data remains unweighted.

Origin market	# trips
Minnesotans	493
Non-MN visitors	1,527
Total	**2,020**

Visitor origins	# surveys
Minnesotan visitors	200
Non-MN visitors	1001
Total visitors	1,201
Potential visitors	496
Total	**1,697**

Sample Plan

- SMARInsights and EMT devised an initial sample plan to reflect origin markets of spring and summer visitors according to geolocation data provider, Datafy. (In 2019, Ubermedia geolocation data was used to identify visitors' origin markets.)
- New in this measure, EMT wanted a quota of potential visitors from three exploratory markets – Atlanta, Dallas, and Colorado – as well as other out-of-state markets. A quota was set to ensure that no more than 500 potential visitors were surveyed. Respondents were accessed through SMARInsights' sample vendors, companies that maintain demographically balanced databases of consumers.
- Minnesota residents typically represent 40-50% of spring-summer visitors. But because EMT is very familiar with in-state visitors, and to ensure sufficient sample of out-of-state visitors to Minnesota, in-state visitor respondents were limited to 200.
- In order to find visitors, SMARInsights surveyed more than 20,000 consumers. From that total volume, the graph at right shows penetration of visitors and potential visitors.



Sample Differences

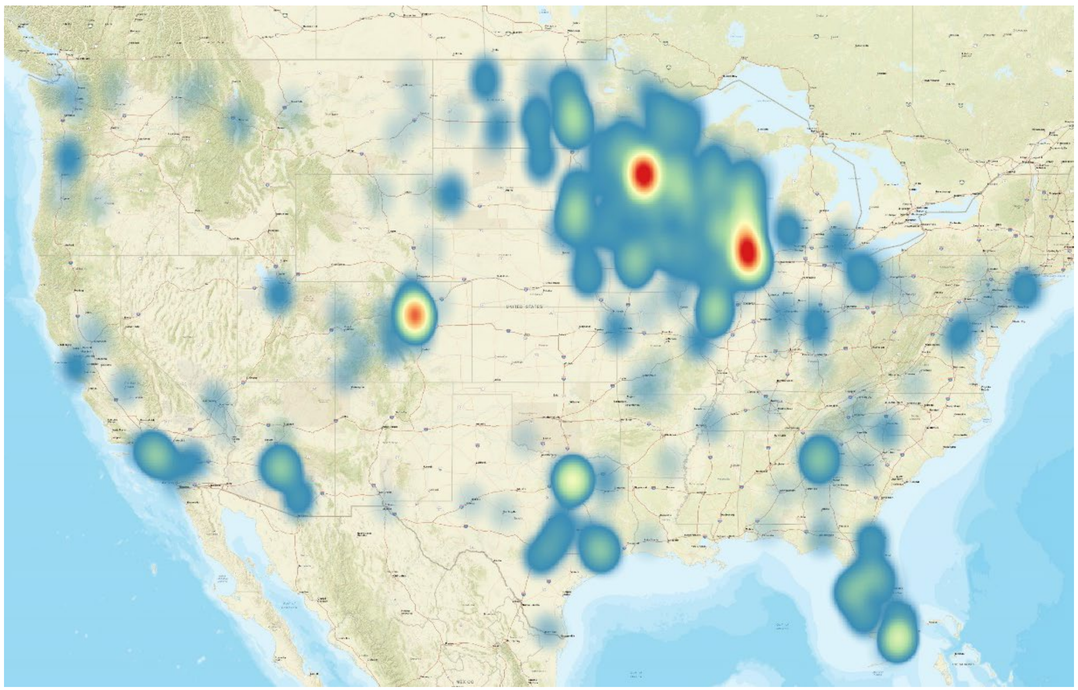
- In 2019 research, data collection was limited to Minnesota, Wisconsin, Illinois, Iowa, North Dakota, Missouri, South Dakota, Nebraska, Canada (southern Manitoba, western Ontario) as a cost control measure and to align that research with prior traveler profiles.
- In the current research, no boundaries were put on data collection; rather, surveys were conducted within the US in markets that Datafy geolocation data indicated were sources of Minnesota visits. Plus, a limit was put on Minnesota in-state visitors, to permit exploration of visitors from other markets. With EMT's niche marketing campaign extending the state's messaging nationally, it is important to keep tabs on visitors from more distant markets.
- The result is that the 2023 data represents a much wider geography, even though visitors have not changed dramatically since 2019 in terms of where they come from.

Sample distribution	2019		2023	
Minnesota	275	34%	200	17%
Surrounding states	194	24%	166	14%
Midwest	324	40%	361	30%
West	3	0%	244	20%
Other US	14	2%	230	19%
TOTAL	**810**	**100%**	**1,201**	**100%**

Visitor origins	2019	2023
Minnesota	55%	60%
Surrounding states	11%	14%
Midwest	14%	16%
West	10%	6%
Other US	10%	4%

Where did spring-summer visitors come from?

- The bulk of visitors continue to come from in-state, and of in-state visitors, the Twin Cities generate most trips.



From EMT's Datafy dashboard showing MN visits April-August 2023.

MN visitation as share of total	
MN	60%
WI	8%
IA	4%
ND	4%
IL	3%
SD	3%
FL	2%
TX	2%
AR	1%
CA	1%
CO	1%
GA	1%
IN	1%
KS	1%
MI	1%
MO	1%
NE	1%
OH	1%
PA	1%
WA	1%
AZ	1%

Visitors by DMA	
Residents	
Minneapolis-St. Paul, MN	82%
Duluth-Superior, MN-WI	8%
Rochester-Mason City-Austin, MN-IA	6%
Mankato, MN	4%
Out of state	
Fargo-Valley City, ND	19%
Milwaukee, WI	8%
Sioux Falls (Mitchell), SD	8%
Chicago, IL	7%
Des Moines-Ames, IA	6%
La Crosse-Eau Claire, WI	5%
Green Bay-Appleton, WI	4%
Cedar Rapids-Waterloo-Iowa City & Dubuque, IA	4%
Kansas City, MO-KS	4%
Omaha, NE	3%
Madison, WI	3%
Dallas-Fort Worth, TX	3%
Denver, CO	3%
Wausau-Rhinelander, WI	3%
Atlanta, GA	2%
Indianapolis, IN	2%
Minot-Bismarck-Dickinson (Williston), ND	2%

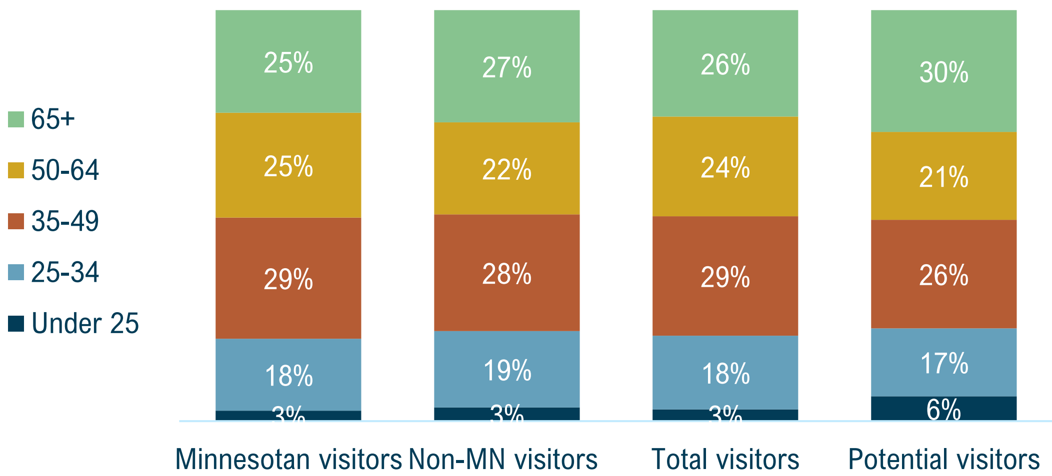
Demographics

In this section, we look at demographic characteristics of Minnesota's spring-summer visitors and potential visitors.

Demographic Profile of Spring-Summer Visitors

- Visitors from the Midwest including Minnesota tend to be fairly evenly distributed across age groups. However, visitors from the more distant markets skew younger. Potential visitors look like a combination of the Surrounding States and Midwest.

Age by Geo and Traveler Type



Mean:	50	49	49	51

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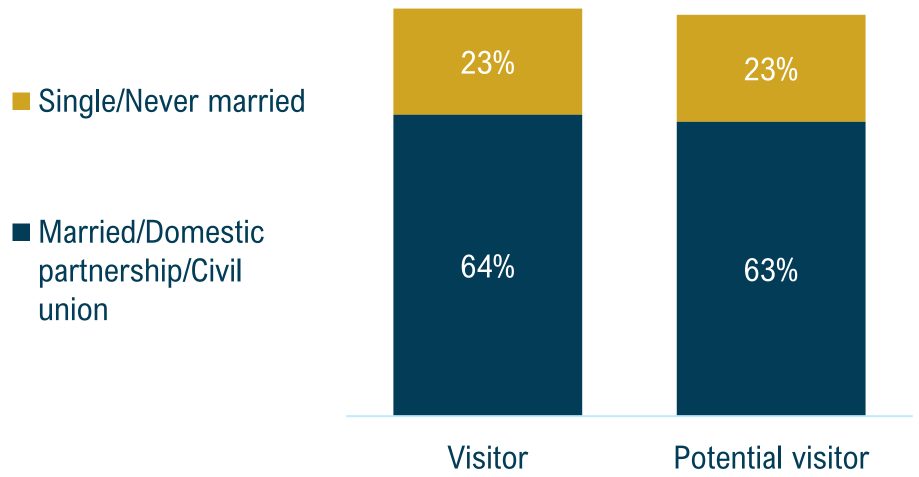
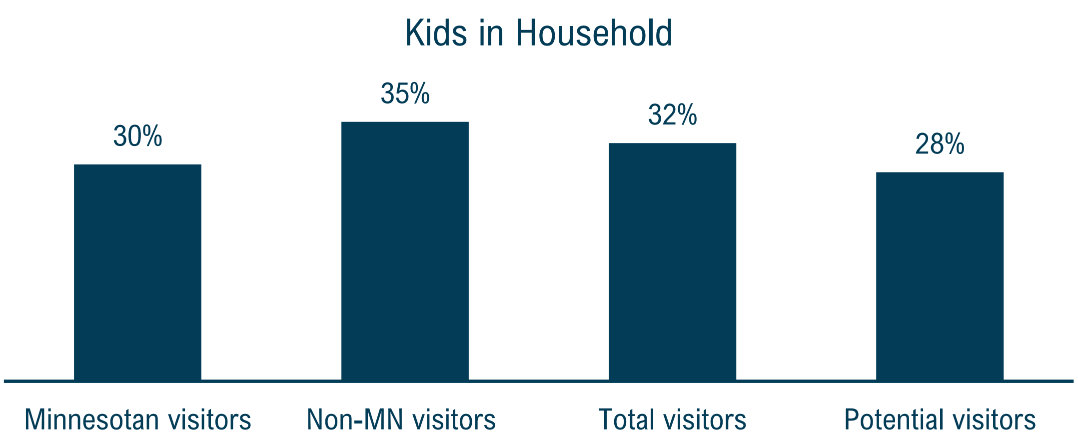
Demographic Profile of Spring-Summer Visitors

- In terms of marital status, visitors and potential visitors look very much alike.
- The presence of kids in the household is also similar across visitors and potential visitors except for Other US. Visitors from this group are much more likely to have kids in the household.





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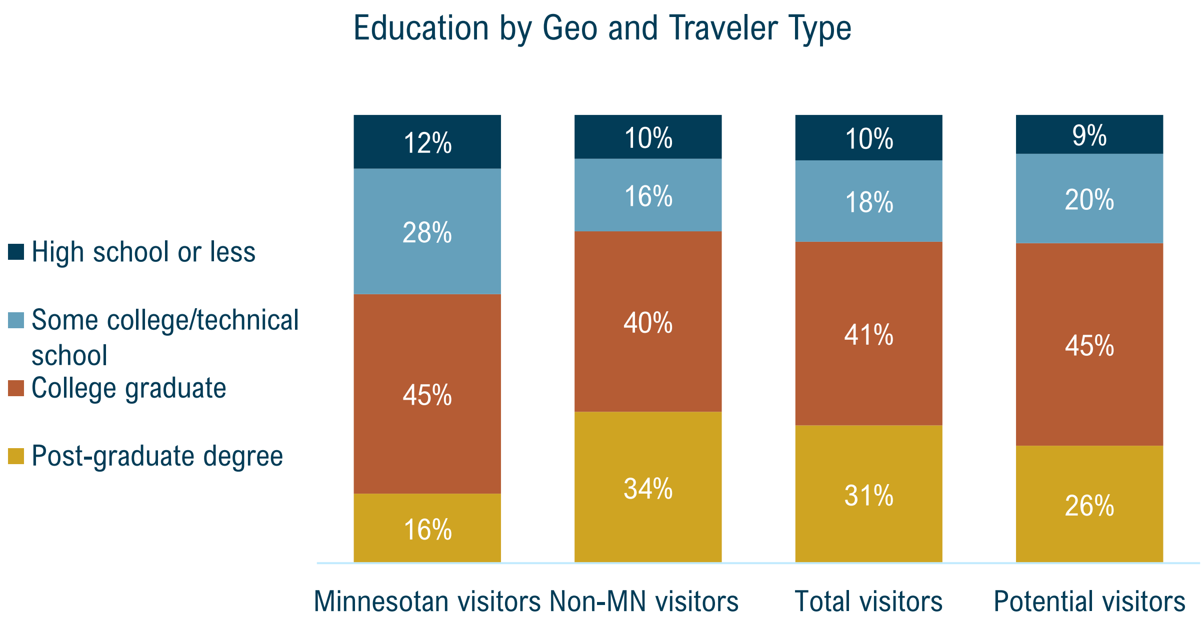
Demographic Profile of Spring-Summer Visitors

- As with age and kids, educational levels look very similar across potential visitors and visitors.
- Out-of-state visitors are better educated than in-state.



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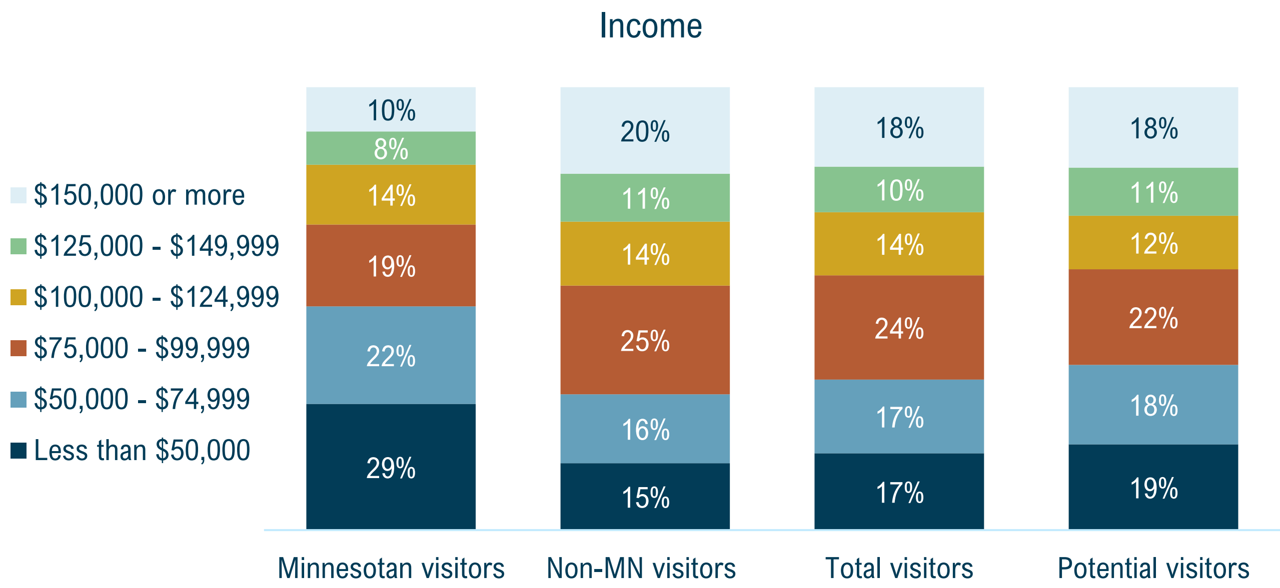
Demographic Profile of Spring-Summer Visitors

- Incomes are similar across out-of-state visitors and potential visitors.
- In-state travelers have lower household incomes, which is consistent with lower educational attainment.



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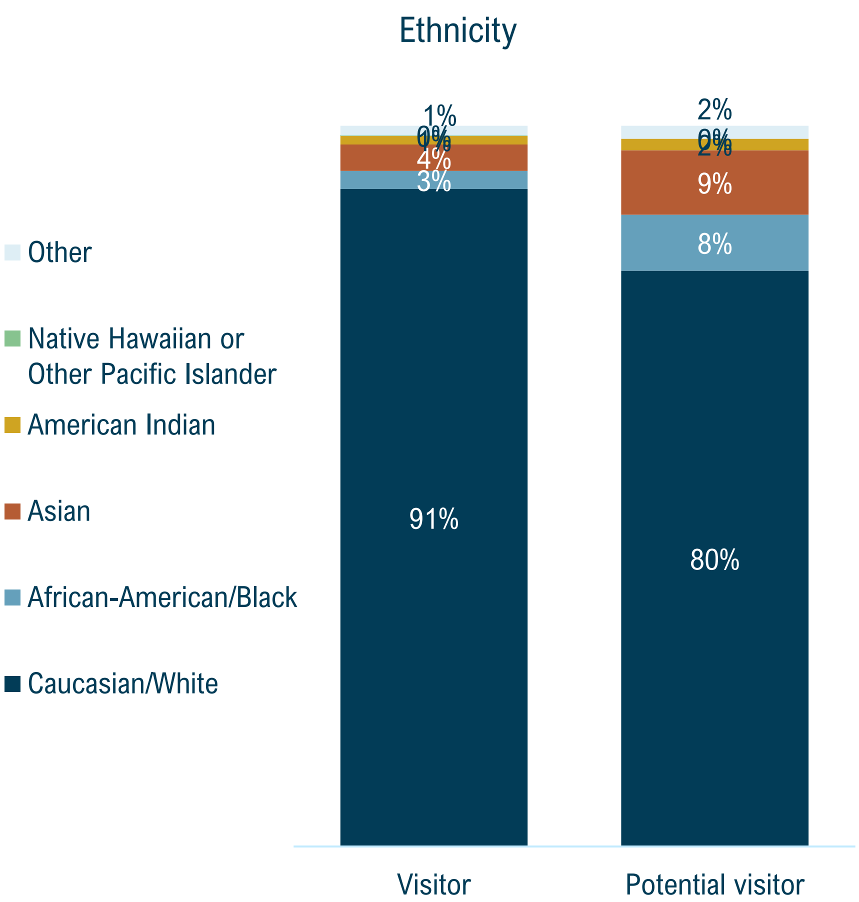
Demographic Profile of Spring-Summer Visitors

- Potential visitors are ethnically more diverse than 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 – 3.75 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)	Summer 2019	Summer 2023
Has great outdoor activities	4.5	4.5
Has great parks and trails	4.5	4.5
Has four amazing seasons	4.3	4.4
Has first-rate fishing*	4.3	4.4
Has great options for families with children	4.4	4.3
Is a place I feel welcome	4.4	4.3
Offers plenty to see and do	4.4	4.3
Has charming small towns	4.3	4.3
Has stunning scenery	4.4	4.3
Offers a relaxing atmosphere	4.3	4.2
Great place to live	4.1	4.2
Is a place for adventure	4.2	4.2
Is a fun and exciting place to visit	4.2	4.1
Has great opportunities for adult vacations	4.3	4.1
Offers a good vacation value for the money	4.2	4.1
Has vibrant cities	4.2	4.1
Has exciting spectator sporting events	4.1	4.0
Great place to work	4.0	4.0
Has first-rate hunting*	4.3	4.0
Has exciting urban entertainment	4.1	3.9
Has fascinating culture and heritage	4.0	3.9

* in 2019, the attribute was, "Has first-rate fishing/hunting"

New Image Attributes

- New image attributes were added with this wave of research to address topics that niche audiences could be interested in.
- The highest rated are Minnesota water sports such as canoeing and kayaking. But breweries, wineries, distilleries, and live events also received high ratings among Minnesota visitors.
- These areas are likely to resonate with travelers, even if they are not specifically niche travelers, because they are already consistent with travelers' image of the state.

How much do you agree that each of these statements describes MN? (Visitor)	Spring-Summer 2023
Is a great place for paddle sports (canoeing, kayaking, etc.)	4.4
Has a variety of fairs and festivals	4.3
Is a great place for breweries, wineries, and distilleries	4.0
Is a great place to attend live music events	4.0
Is home to several appealing National Parks sites	3.8
Has exceptional golf courses	3.8
Has an amazing culinary scene	3.8

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.
- New attributes have been allocated to the appropriate group.
- 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	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
Has first-rate hunting	Has variety of fairs and festivals
Is a great place for paddle sports	Is a great place for breweries, wineries, and distilleries
Is home to several appealing National Parks sites	Has an amazing culinary scene
Has exceptional golf courses	Is a great place to attend live music events

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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, Minnesota owns outdoor. Consumers across the country are aware of the state's parks and trails, outdoor activities, and scenery.
- Attributes at the bottom of the list – hunting, national parks, and golf – have more niche appeal. They are strongly appealing to a small share of travelers.

Natural/Outdoor	Minnesotan visitors	Non-MN visitors	Total visitors	Potential visitors
Has great outdoor activities	4.6	4.3	4.4	4.2
Has great parks and trails	4.6	4.2	4.3	4.1
Has four amazing seasons	4.5	4.3	4.3	4.1
Has first-rate fishing	4.5	4.2	4.3	4.0
Is a great place for paddle sports	4.5	4.2	4.2	4.1
Has great options for families with kids	4.4	4.2	4.3	4.0
Has charming small towns	4.4	4.2	4.2	4.1
Has stunning scenery	4.3	4.2	4.2	4.2
Offers a relaxing atmosphere	4.2	4.2	4.2	4.0
Is a place for adventure	4.2	4.1	4.1	4.0
Offers a good vacation value for the money	4.1	4.1	4.1	4.0
Has first-rate hunting	4.1	3.9	3.9	3.7
Is home to several appealing National Parks sites	3.9	3.8	3.8	3.8
Has exceptional golf courses	3.9	3.7	3.7	3.5

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 consistent with prior measures and underscores the challenge of promoting leisure assets that are common to many states.

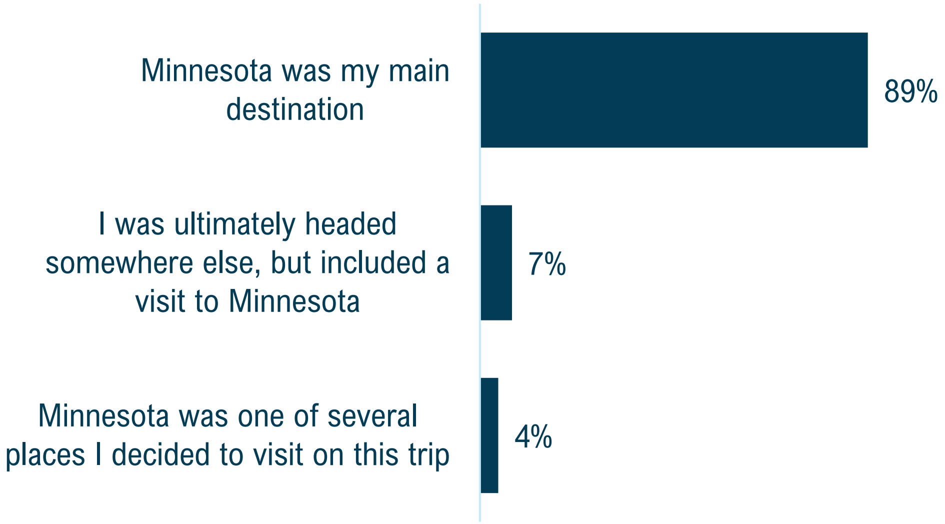
Minnesota is/has…	Minnesotan visitors	Non-MN visitors	Total visitors	Potential visitors
Has a variety of fairs and festivals	**4.4**	**4.1**	**4.2**	**4.0**
Great place to live	4.3	4.0	4.0	3.8
Great opportunities for adult vacations	4.2	4.1	4.1	4.0
A fun and exciting place to visit	4.2	4.1	4.1	4.0
Is a great place for breweries, wineries, and distilleries	4.2	3.9	4.0	3.8
Vibrant cities	4.1	4.0	4.1	4.0
An exciting spectator sporting events	4.1	4.0	4.0	3.8
Place to work	4.1	3.9	3.9	3.6
Is a great place to attend live music events	4.1	3.9	3.9	3.7
Exciting urban entertainment	4.0	3.9	4.0	3.8
Fascinating culture and heritage	3.9	3.9	3.9	3.8
Has an amazing culinary scene	3.8	3.8	3.8	3.7

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 2,020 spring-summer visits.

Main Destination

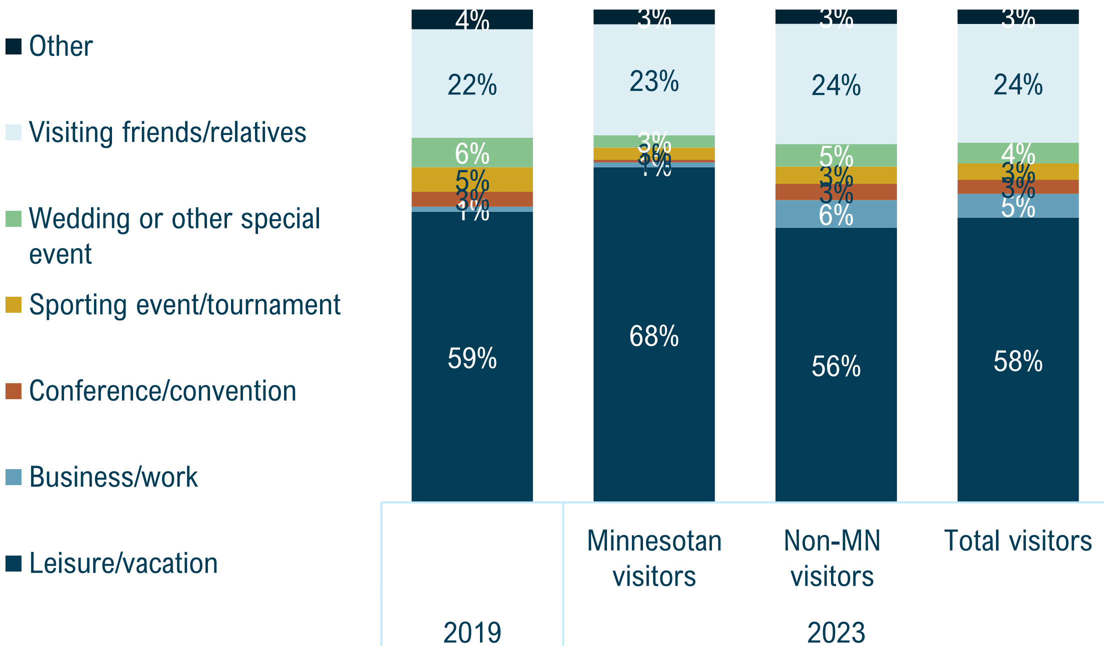
- Minnesota was the main destination for nearly 9 out of 10 spring-summer visits.
- The balance of trips were road trips that included a stop in Minnesota. Other places included on these trips were the Dakotas, Wisconsin, Iowa, Illinois, and other Midwestern states.



Purpose of Trip

- Most spring-summer trips were for leisure or visiting friends and relatives.
- Among non-MN visitors, there is a wider variety of purposes. More Minnesota trips are for business or special events. These other trip purposes are ways that Minnesota is introduced to new visitors.

Was this trip to/within Minnesota primarily for…?



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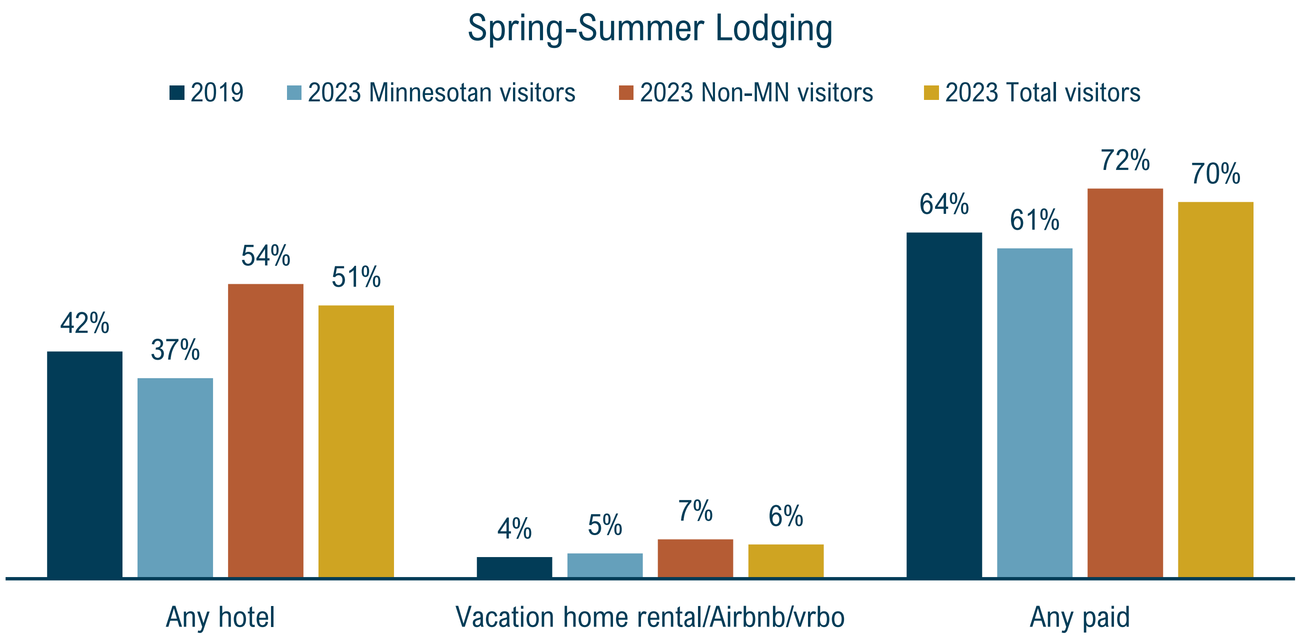
Accommodations

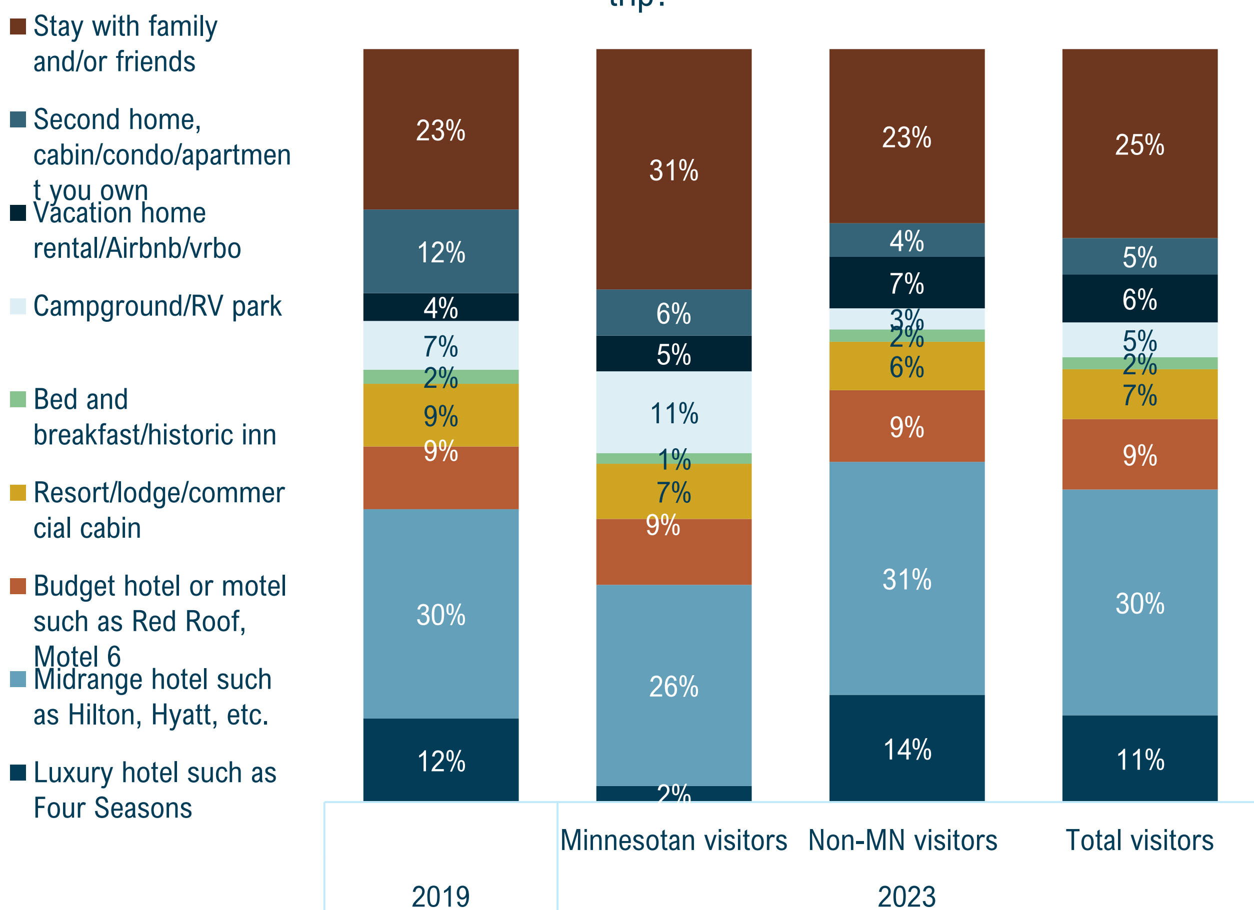
- Spring and summer in-state trips were less likely to use paid accommodations. But out-of-state visitors were more likely to use paid lodging, and hotels in particular.



Accommodations

- Half of visitors stayed in mid-range hotels or with friends and family. Closer markets were much more likely to stay with friends and family than those from farther away.
- Visitors from farther away were much more likely to stay in luxury hotel properties and Airbnb.
- In the 2019 visitor profile, 12% of spring and summer visitors stayed in a property they owned. That figure was down this year, due to the more distant market visitors.

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



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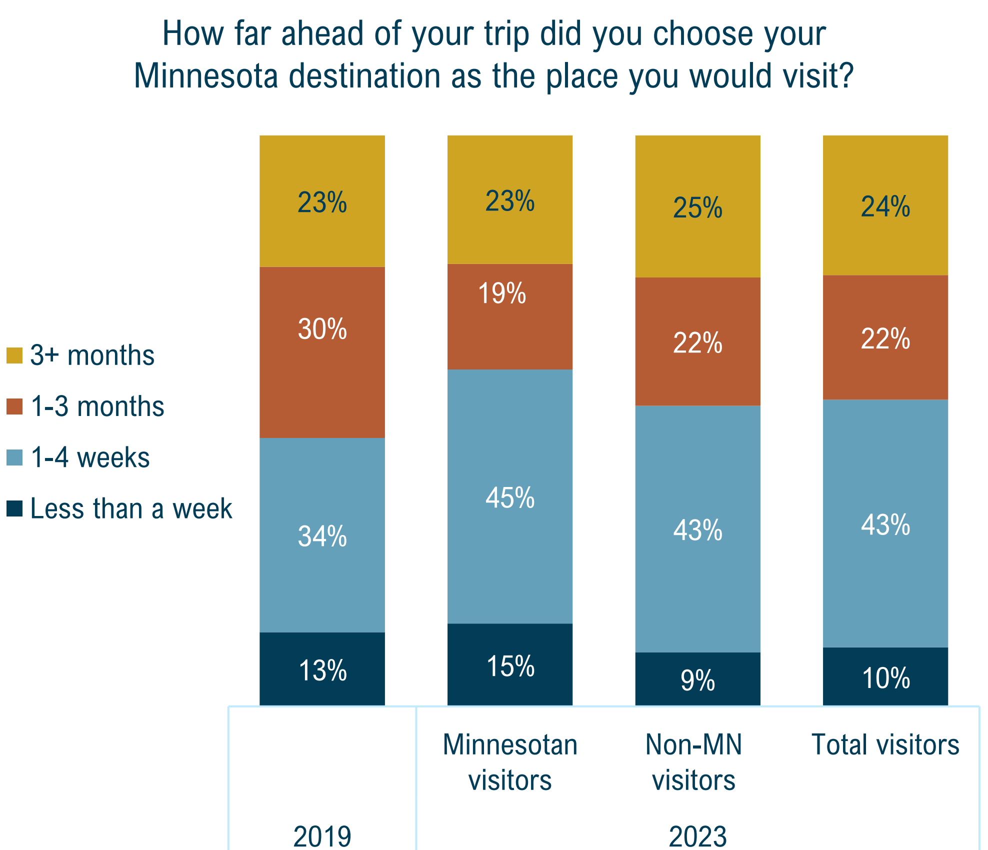
Trip Planning

- Over half of spring-summer trips are planned within a month of visiting, just slightly higher than the pre-pandemic measure.
- Very short-term planning, less than a week, is consistent among in-state trips. But visitors from out-of-state are less likely to choose their destination in that short a term.
- Planning horizons decreased during the pandemic when some destinations announced travel restrictions and availability was less certain. But the planning horizon has returned to a more typical pattern.



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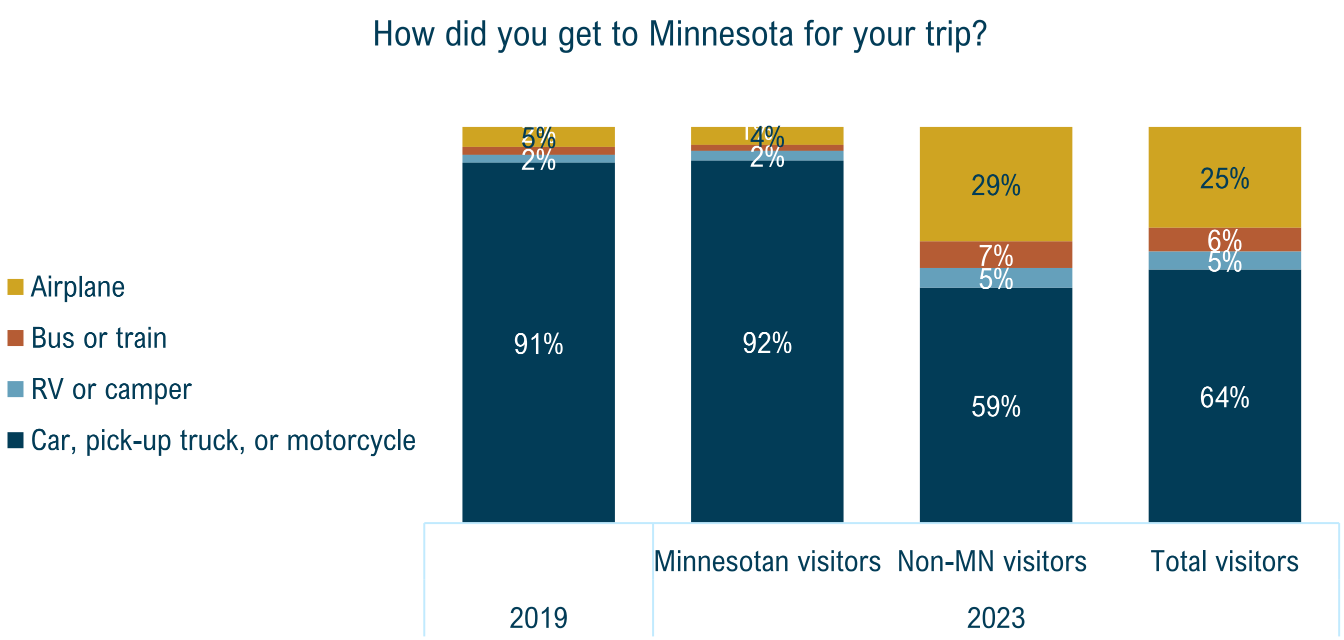
Mode of Transportation

- In-state trips look very much like the 2019 spring-summer measure. More than 9 out of 10 used personal vehicles, and fewer than 10% were by air.
- Trips from more distant markets are much more likely to involve air travel.



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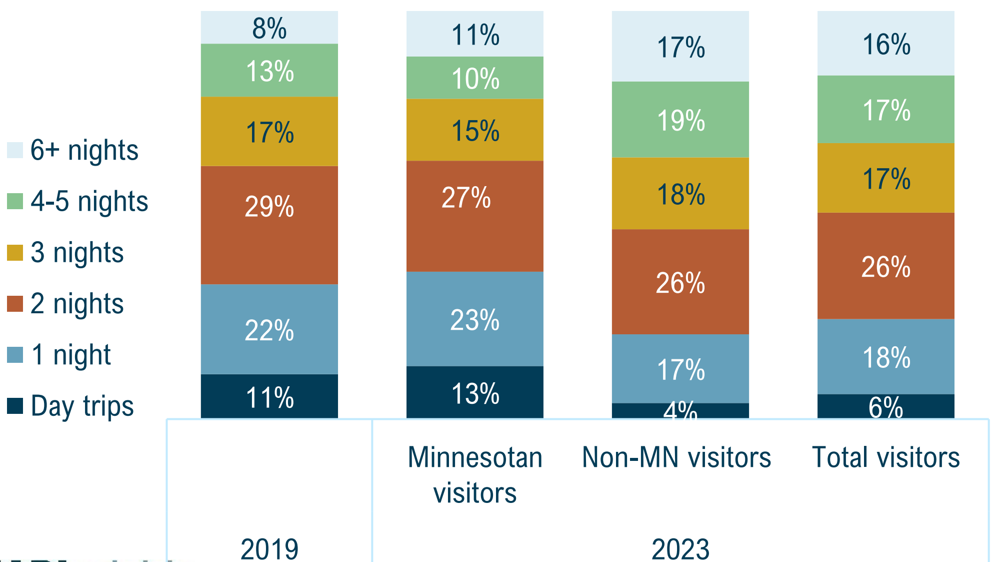
Trip Specifics

- Trips are considerably longer this year than they were pre-pandemic, as we saw in the winter metrics. Data reflects fewer day trips, even accounting for origin market geographies. Visitors from more distant markets tend to stay longer.
- This metric is broken out by market group later in the report.

How many nights did you stay in Minnesota/away from home on your trip?



	Nights in MN	Nights on trip
2019	3.1	3.2
2023		
Minnesotan visitors	3.3	3.7
Non-MN visitors	4.1	5.1
Total	3.9	4.8

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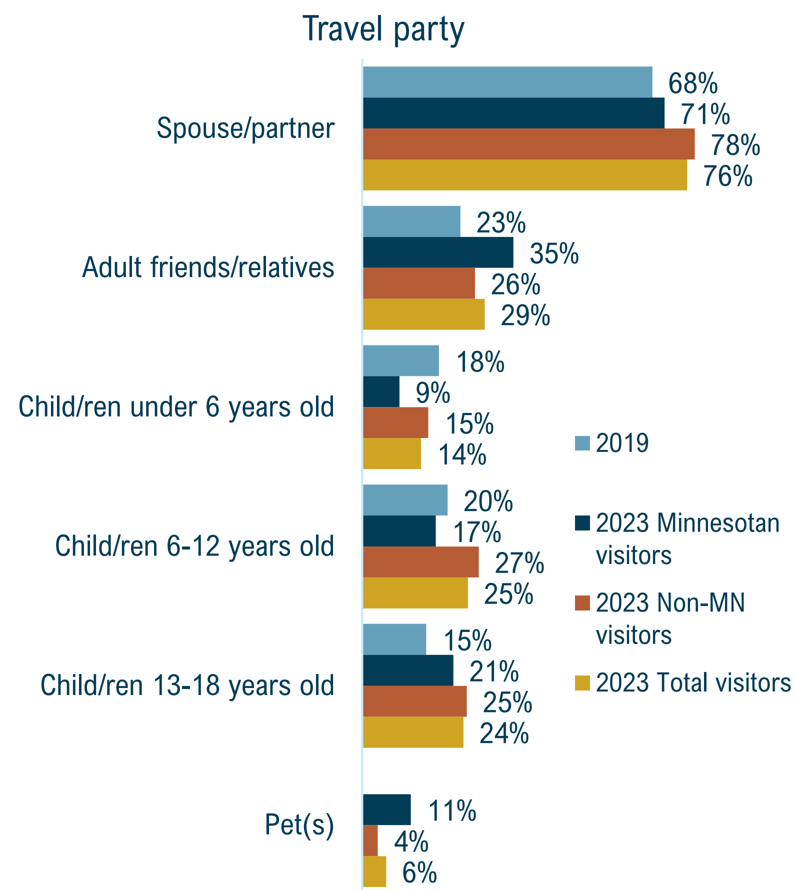
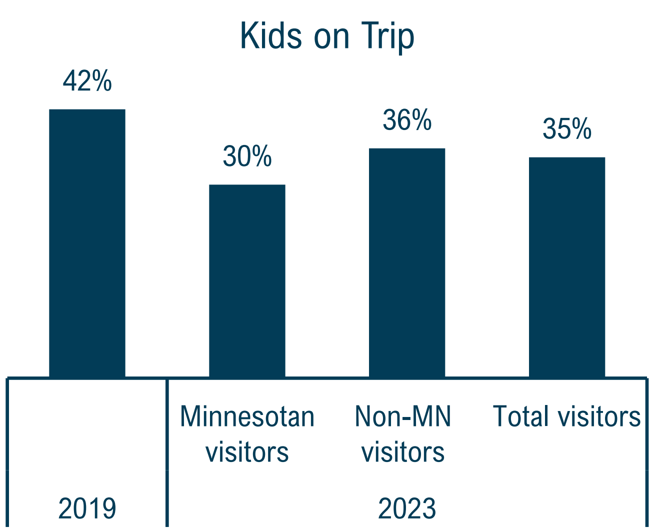
Trip Specifics

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

- Spring-summer travel parties are similar in composition to those in 2019, and somewhat smaller overall. Travel party size is the same across geographies.
- In-state travelers were more likely to travel with pets, while other visitors were more likely to bring children.



Travel party size	
2019	3.0
2023	2.8



Trip Specifics

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

- Directionally, spring-summer activities are similar to prior measures. However, with more visitors coming from farther away, there is more exploration of the state's leisure assets.

Half of trips or more	
Dining out	60%
Shopping	54%

Popular activities/attractions	
Nature walks	47%
Friends or relatives	47%
Sightseeing	42%
Scenic drives	41%
Fairs/festivals/events	35%
State/national parks	31%
Arts/cultural activities	30%
Mall of America	30%
Swimming	29%
Designated scenic byways	29%
Hiking/backpacking	28%
Nightlife, concerts	27%

Activities/attractions with select appeal	
Historical attractions	25%
Fishing	23%
Museums and galleries	23%
Wineries/breweries/distilleries	23%
Professional sporting events	22%
Amusement parks/carnivals	20%
Health and wellness activities	20%
Wildlife/bird watching	20%
Zoos	17%
Theater performances	17%
Casinos	16%
Water parks	16%
Amateur sporting events/tournaments	15%
Parades and cultural events	14%
Paddling – canoeing, kayaking, paddleboard, etc.	14%
Camping	14%

Niche activities	
Motor boating/water skiing/jet skiing	13%
Golfing	12%
Mountain biking/fat biking	11%
Paved trail/road biking	9%
Motorcycling	7%
Off-roading/ATV driving	7%
Hunting	6%

Trip Specifics

Trip specifics data is for 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 trip. The top trip motivator for spring-summer trips over time and across geographies is friends and relatives, as it was for winter trips.
- Among closer markets, scenic drives, dining, parks, and shopping are the next top trip motivators. The Mall of America is a lower motivator than pre-pandemic, but parks, fishing, and scenic drives are all larger motivators than they were.
- In the more distant markets, shopping, unique dining experiences, the Mall of America, and sightseeing lead Minnesota trip motivators. Reflecting EMT's advertising focus, national parks and concerts, festivals and events are also among the top spring-summer trip motivators.

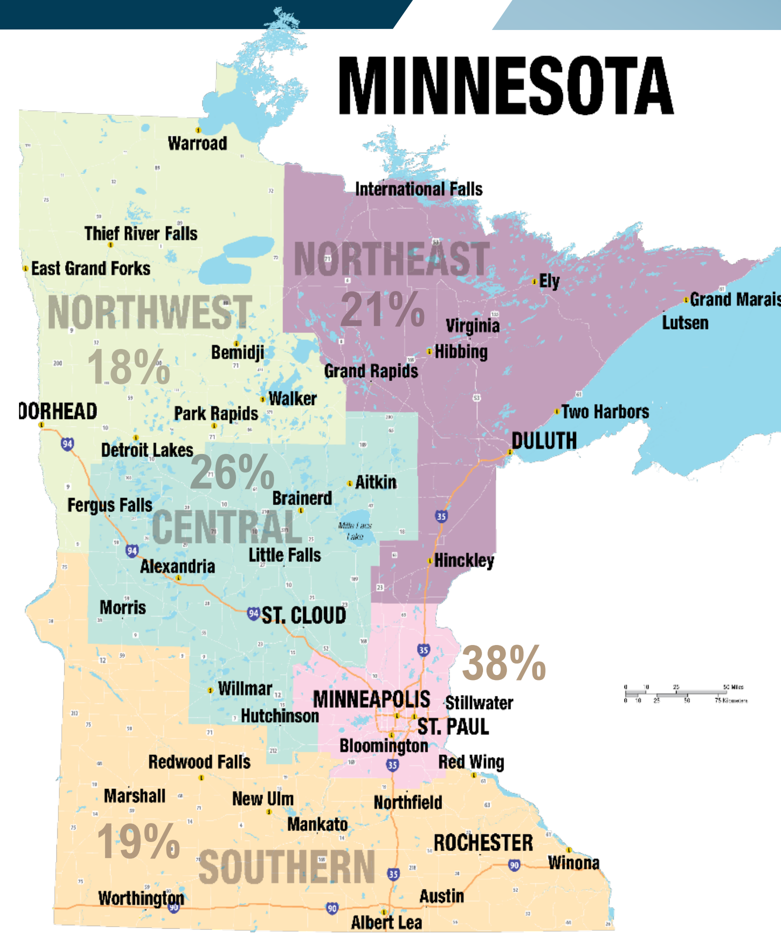
MN + Surrounding states' motivators	2019	2023
Friends or relatives	30%	37%
Scenic drives	16%	19%
Dining at unique locally-owned restaurants (non-chain)	17%	14%
State/national parks	9%	13%
Shopping	16%	13%
Fishing	9%	12%
Hiking/backpacking	10%	12%
Sightseeing	17%	12%
Mall of America	19%	11%
Fairs/festivals/events	8%	7%

Motivators among more distant markets	
Friends or relatives	32%
Shopping	19%
Dining at unique locally-owned restaurants (non-chain)	15%
Mall of America	15%
Sightseeing	12%
Nightlife, concerts and entertainment	11%
Fairs/festivals/events	11%
Scenic drives	11%
State/national parks	10%
Arts and cultural activities	9%

Trip Specifics

- Visits to Minneapolis/St. Paul (MSP Metro) made up 38% of spring-summer 2023 trips, down from 43% in 2019.
- There is a bump in visits to northwest and central Minnesota compared to the last measure. Visitors from both geographies went to these areas more than 2019 visitors did.

	2019	2023		
		Minnesotan visitors	Non-MN visitors	Total
Northwest	10%	10%	21%	18%
Northeast	20%	26%	20%	21%
Minneapolis/ St. Paul area	43%	34%	39%	38%
Central	19%	24%	26%	26%
Southern	16%	16%	20%	19%



Trip Spending

- Average trip spending is up over 2019 metrics in all categories.
- On average the increase is roughly 80%. This is in line with the increase in winter trip spending from 2019 to 2023.
- Much of the increase in spring-summer trip spending is due to travelers from more distant markets. Average trip spending for Minnesota and surrounding states is just over $600, compared to more than $950 for the other markets.

	2019 Total	2023 Total	Overnight, pd. lodging	Day trips	Visit friends & relatives
Lodging and camping accommodations	$172	$213	$325	$0	$15
Food and beverages, including groceries	$118	$188	$211	$121	$151
Arts & culture such as museums, historic sites, etc.	$12	$43	$59	$15	$16
Recreational fees, rentals, equipment, etc.	$13	$45	$63	$3	$16
Sporting events	$11	$33	$46	$8	$12
Other events, entertainment and attractions	$23	$59	$72	$24	$39
Shopping – tourist (gifts, souvenirs, antiques, arts and crafts)	$29	$64	$81	$14	$38
Shopping – general (clothing, personal or household items)	$43	$74	$92	$32	$44
Transportation within Minnesota (car rental, car sharing, fuel, etc.)	$34	$59	$66	$41	$46
Other	$5	$36	$39	$0	$20
TOTAL	**$463**	**$813**	**$1,054**	**$259**	**$398**

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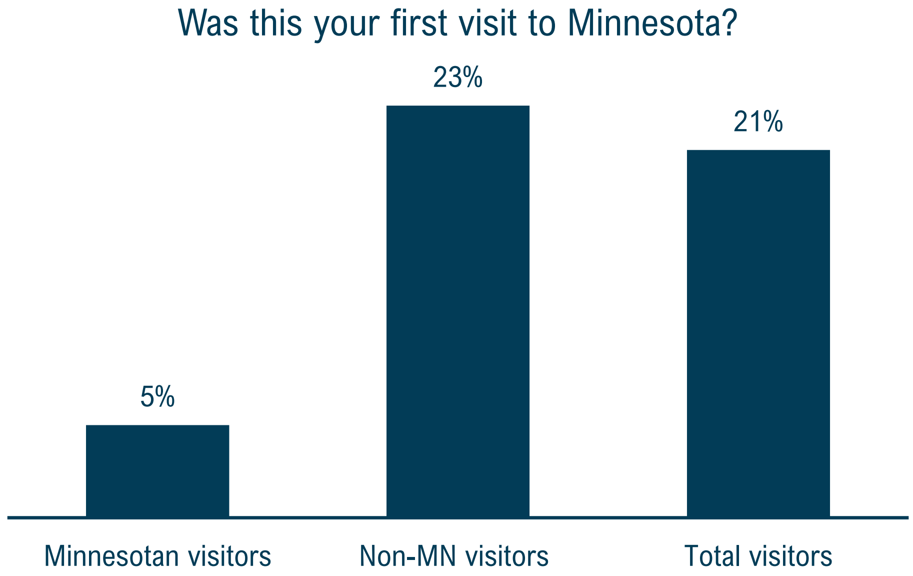
Trip Specifics

- Factoring in travel party size and length of stay, spring-summer visits bring in an average of $78 per person per day, up from $56 per person per day in 2019.
- Per person per day spending totals for day trips and overnights in paid lodging are up considerably over the 2019 measures. This is due in large part to visitors from farther markets, who spend an average of $80 per person per night versus just $63 per person per night from in-state and surrounding states.

Spending by trip type	TOTAL	Overnight, pd lodging	Day trips	Visit friends & relatives
TOTAL spending	$852	$1,054	$259	$398
Travel party	2.8	3.0	2.8	2.3
Length of stay (nights)	3.9	3.2	0.0	5.5
Spending per person/day	**$78**	**$109**	**$94**	**$31**
2019 spending per person/day	$56	$62	$37	$26

First-time vs. Repeat Visitors

- One in five spring-summer visitors are new this year to Minnesota. Out-of-state markets are the most likely to produce first-time visitors.



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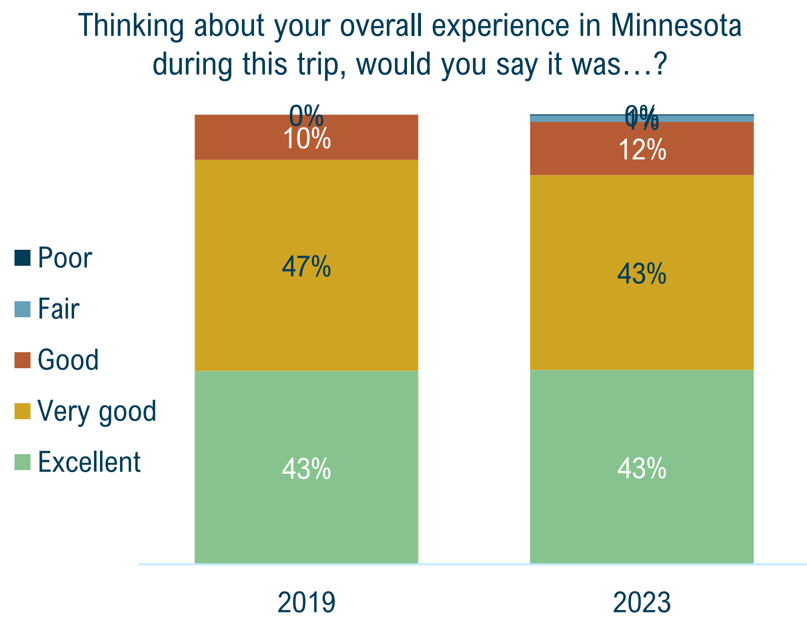
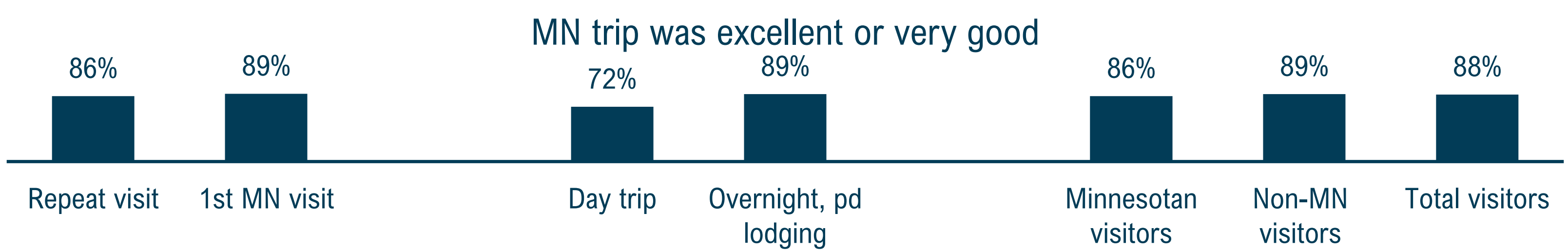
Visitor Satisfaction

- Spring-summer visitors are overwhelmingly positive about their Minnesota experience.
- As we saw in winter, overnight stays generate an even more positive response than day trips.
- There is little difference between repeat and first-time visits, or between in- and out-of-state markets.





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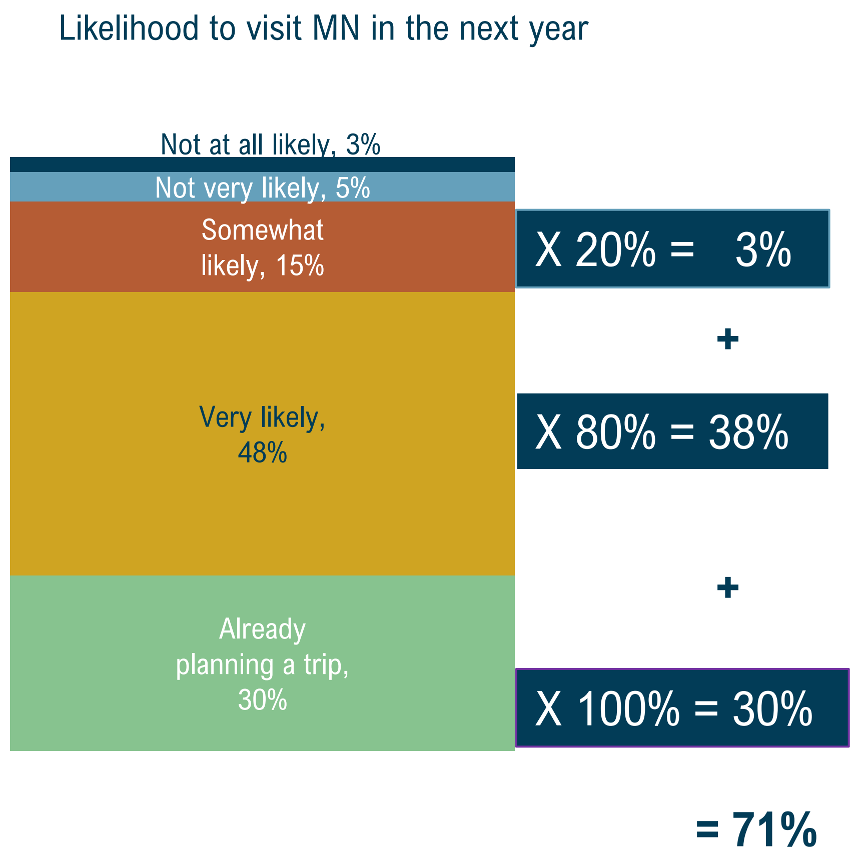
Intent for Return Visit

- Visit intent among spring-summer visitors is 71%. 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.



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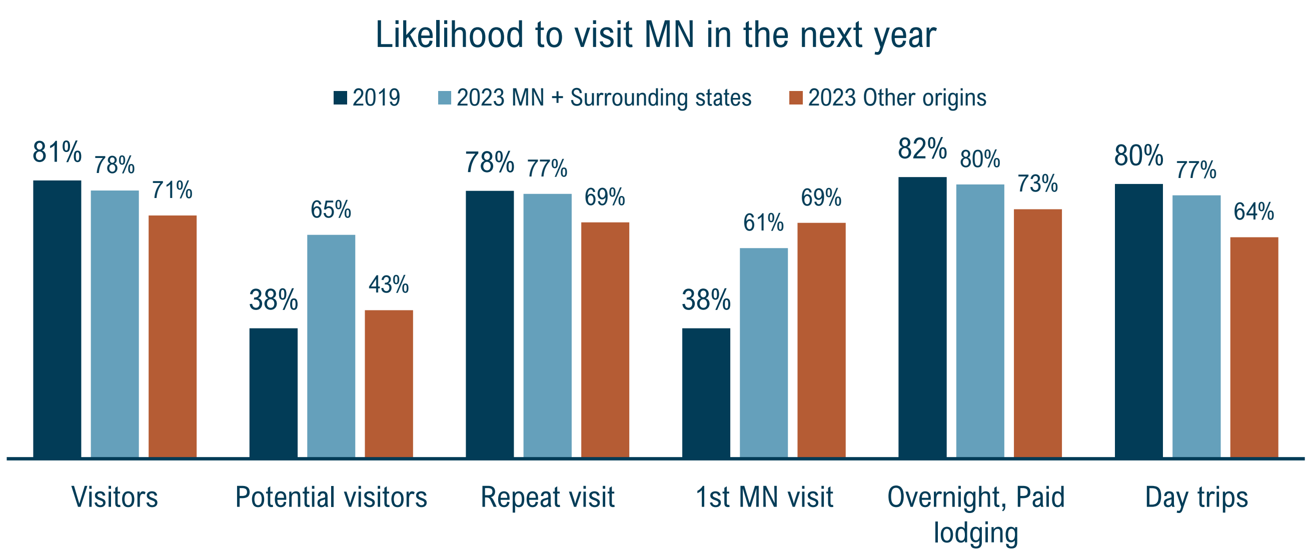
Visit Intent

- Compared to the last measure, potential visitors, and first-time visitors are more likely to visit the state within the next year.



Potential Visitors

Potential visitors

- Potential visitors are consumers who have not visited Minnesota recently but have some degree of likelihood to do so in the next year.
- The primary markets where surveying was focused on potential visitors are the Exploratory markets: Atlanta, Dallas, and Colorado.
- Sample sizes are small for the remaining market groups, and there were no potential visitors surveyed in state. So reporting will be for the Exploratory markets and all other markets combined.

Market group	Completed surveys
Exploratory markets	218
Surrounding states	27
Midwest	79
West	72
Other US	100
Total	**496**

278

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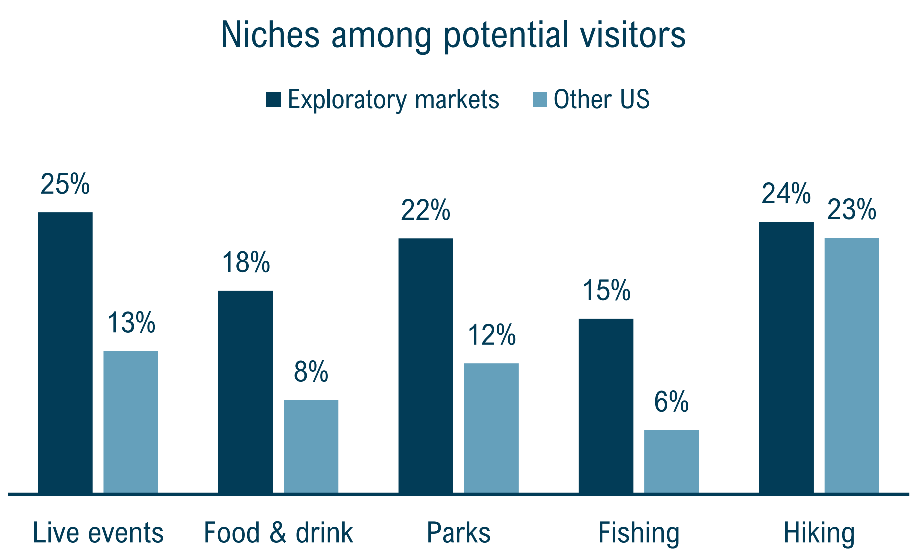
Demographics

- Demographic differences can help explain behaviors, so this review is important as we go forward in the results.
- We showed earlier in the report that potential visitors tend to be younger than visitors. Breaking it out by market group illustrates that the Exploratory markets drive the age skew.
- Exploratory markets are also more likely to have kids in the household, while potential visitors from other markets are less likely than visitors to have kids.
- Potential visitors are better educated and more affluent than visitors, and this is true across market groups.

		Potential Visitors		
		Exploratory markets	Other US	Visitors
Age	Under 25	11%	2%	3%
	25-34	23%	11%	18%
	35-49	29%	24%	29%
	50-64	17%	24%	24%
	65+	19%	38%	26%
Household	Married	61%	64%	64%
	Single/ Never married	27%	19%	23%
	Kids in HH	33%	24%	31%
	LGBTQ	6%	6%	7%
Education	High school or less	9%	9%	11%
	Some college/ technical school	22%	19%	25%
	College graduate	44%	46%	44%
	Post-graduate degree	26%	26%	20%
Income	<$50k	20%	19%	25%
	$50k - $74,999	18%	18%	20%
	$75k - $99,999	23%	21%	20%
	$100k - $124,999	12%	12%	15%
	$125k - $149,999	11%	11%	8%
	$150k+	17%	19%	13%

Niches among potential visitors

- Other than the hiking niche, the remaining summer and fall niche categories are much more prevalent in the Exploratory markets than they are elsewhere among potential visitors. Younger, more affluent travelers may be more likely to choose their destination based on these activities.



Familiarity

- Familiarity is similar among potential visitors in both groups of markets. Colorado leads, followed by Minnesota and Illinois.
- Some of this is geographically driven; for instance, Colorado is within the Exploratory markets and therefore is most familiar among this group. However, Colorado also leads familiarity among the Other US markets.
- Familiarity is influenced by, but not completely determined by, geography.

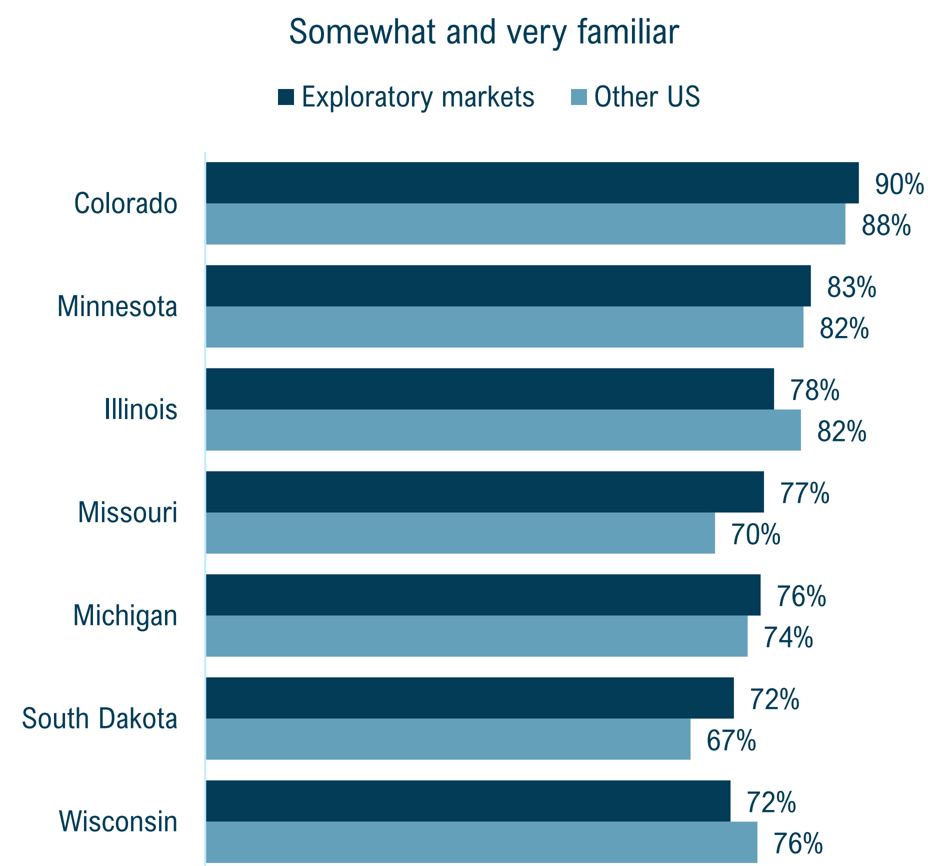


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Image

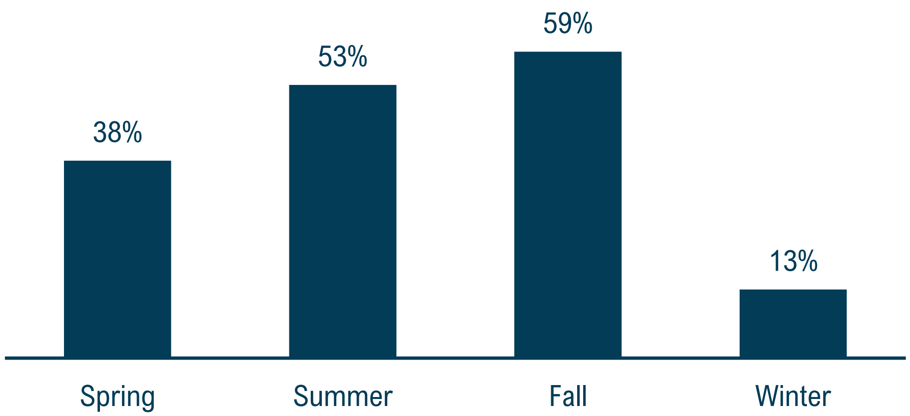
- Directionally, potential visitors rate Minnesota similarly to visitors, although visitor ratings are generally higher.
- Minnesota's outdoor product is clearly the best known of its leisure assets among potential visitors; the developed, urban product is less so.
- Interestingly, none of these image attributes has a particularly strong correlation with likelihood to visit, meaning that these are not the elements that consumers use to decide whether to visit Minnesota. The strongest correlation, at 23%, is for being a good vacation value. But a strong correlation would be in the high 40's or 50's.

	Potential visitors		Visitors
	Exploratory markets	Other US	
Has stunning scenery	4.2	4.2	4.3
Has great outdoor activities	4.2	4.3	4.5
Has great parks and trails	4.1	4.2	4.5
Offers plenty to see and do	4.1	4.1	4.3
Has charming small towns	4.1	4.1	4.3
Has great opportunities for adult vacations	4.0	4.0	4.1
Is a fun and exciting place to visit	4.0	4.0	4.1
Is a place I feel welcome	4.0	4.1	4.3
Has great options for families with children	4.0	4.0	4.3
Is a great place for paddle sports (canoeing, kayaking)	4.0	4.2	4.4
Offers a relaxing atmosphere	4.0	4.1	4.2
Is a place for adventure	4.0	4.0	4.2
Has a variety of fairs and festivals	4.0	4.0	4.3
Has four amazing seasons	3.9	4.1	4.4
Has first-rate fishing	3.9	4.1	4.4
Offers a good vacation value for the money	3.9	4.0	4.1
Has vibrant cities	3.9	4.0	4.1
Has fascinating culture and heritage	3.9	3.8	3.9
Is home to several appealing National Parks sites	3.8	3.7	3.8
Great place to live	3.8	3.8	4.2
Has exciting urban entertainment	3.8	3.8	3.9
Has exciting spectator sporting events	3.8	3.8	4.0
Is a great place for breweries, wineries, and distilleries	3.7	3.8	4.0
Has first-rate hunting	3.7	3.7	4.0
Has an amazing culinary scene	3.7	3.6	3.8
Is a great place to attend live music events	3.7	3.7	4.0
Great place to work	3.7	3.6	4.0
Has exceptional golf courses	3.6	3.4	3.8

Potential visits

- Potential visitors were asked what time of year they would visit Minnesota. Summer and fall are the most common seasons cited.
- Asked what other states would provide a similar leisure experience to Minnesota, 16% of potential visitors said Wisconsin, 10% said Michigan, and 5% said Colorado.

If you were to visit Minnesota, what time of year do you think you would visit?



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Top activities by season

- Potential visitors were asked what they would do in Minnesota on a potential visit. Unsurprisingly, travelers who have not been to Minnesota are most likely to want to look around, explore, and see what the state looks like. The top activities in each season include sightseeing, nature walks, and scenic drives.

Spring		Summer		Fall		Winter	
Sightseeing	59%	Scenic drives	58%	Sightseeing	62%	Sightseeing	59%
Nature walks	58%	Sightseeing	57%	Viewing fall colors	61%	Nature walks	58%
Dining at unique locally-owned restaurants	57%	Dining at unique locally-owned restaurants	54%	Nature walks	60%	Scenic drives	47%
Scenic drives	54%	Nature walks	54%	Scenic drives	59%	Fairs/festivals/events	47%
Fairs/festivals/events	52%	State/national parks	48%	Dining at unique locally-owned restaurants	53%	Arts and cultural activities	45%
State/national parks	48%	Fairs/festivals/events	47%	Fairs/festivals/events	48%	Dining at unique locally-owned restaurants	45%
Arts and cultural activities	43%	Arts and cultural activities	44%	State/national parks	47%	Shopping	41%
Shopping	41%	Shopping	41%	Arts and cultural activities	40%	Museums and galleries	39%
Museums and galleries	40%	Museums and galleries	38%	Shopping	36%	Theater performances	36%
Historical attractions	37%	Historical attractions	35%	Museums and galleries	36%	Professional sporting events	36%
Mall of America	33%	Mall of America	32%	Historical attractions	36%	Nightlife, concerts and entertainment	36%