



Explore Minnesota

Reputation & Travel Preferences Survey



July 2021

OBJECTIVES & METHODOLOGY



Objectives

Explore Minnesota partnered with Weber Shandwick and KRC Research to conduct a survey of prospective travelers from key local (Minneapolis, Fargo/Moorhead) and national (Atlanta, Chicago, Denver, Kansas City, Los Angeles, Milwaukee, New York City) markets on current attitudes toward traveling to Minnesota.

The research findings will be used to deepen understanding of travelers' opinions toward taking a vacation in Minnesota in 2021-2022, to identify the impact of the events of 2020 (including COVID-19 and civil unrest) on travelers' perceptions of Minnesota, and to identify top attractions/travel categories to promote via ongoing earned and paid media.



Methodology

KRC Research conducted a study of n=1,718 potential domestic travelers in 9 key markets in the United States via a 15-minute online survey. The survey fielded from June 16 to June 27, 2021.

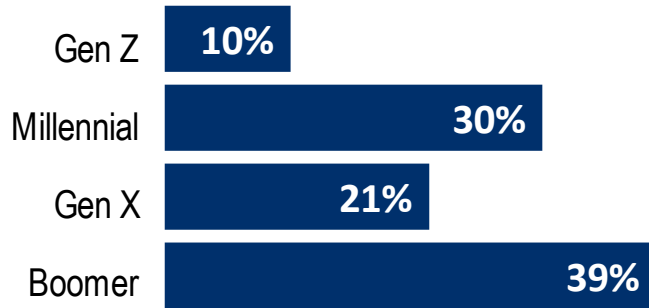
We screened survey respondents to ensure they intend to travel for vacation or leisure/personal purposes within the next 18 months. We did this to ensure we screened out any “travel rejecters” – individuals who are not in the right mindset to evaluate travel destinations because they are unlikely to vacation at all.

Note: all percentages are rounded in this report and differences between markets are highlighted in green and red for significantly higher or lower differences, respectively.

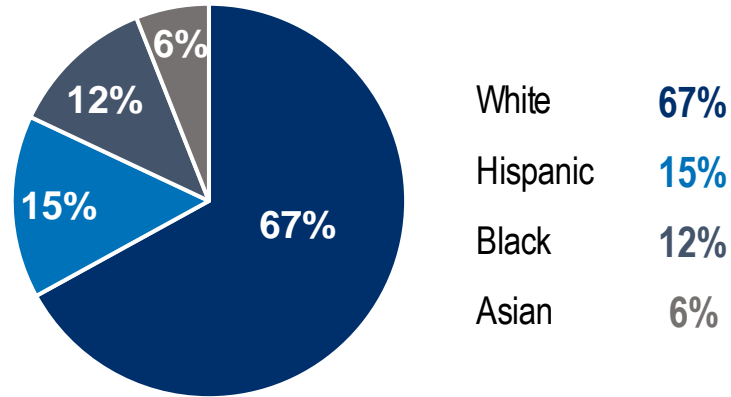
Respondent Profile

We surveyed the following cities: Minneapolis, Fargo/Moorhead, Atlanta, Chicago, Denver, Kansas City, Los Angeles, Milwaukee, and New York City.

AGE



RACE OR ETHNICITY



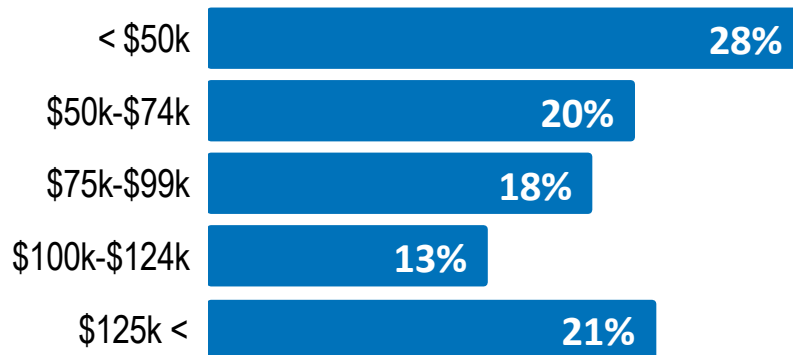
EMPLOYMENT

- 62% Employed
- 14% Not currently employed
- 25% Retired

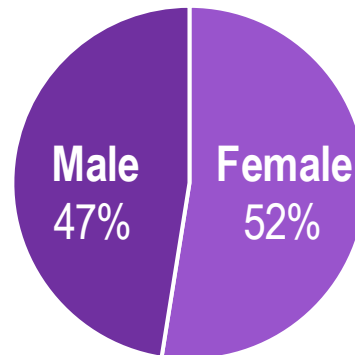
MARITAL STATUS

- 65% Partnered
- 35% Unpartnered

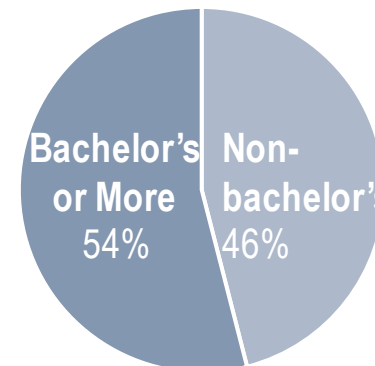
HH INCOME



GENDER



EDUCATION



CHILDREN UNDER 18

- 32% Yes
- 68% No

URBANICITY

- 36% Urban
- 55% Suburban
- 9% Rural

▶ Key Takeaways



Key Takeaways

- 1. Although it's typically not rated within the top 5 states travelers would like to visit next, the state of Minnesota is generally viewed as an attractive vacation destination.** Most prospective travelers in key markets have a favorable or neutral impression of Minnesota as a travel destination, and roughly half say they're at least somewhat likely to visit the state in the next 18 months.
 - Those living in Midwestern cities tend to be more favorable and more likely to visit.
 - Those who say they've visited Minnesota in the past have had widely positive experiences there.
- 2. Value for the money, cleanliness, climate, safety, a welcoming atmosphere, and ease of transportation are the attributes that have the biggest impact on likelihood to visit Minnesota.** Minnesota is also viewed as a more attractive destination than Michigan, though it lags behind Wisconsin. However, Minnesota is considered to have more adequate COVID-19 regulations, which may contribute to perceptions of the state as being safe and responsible.
- 3. The north shore of Lake Superior is the most appealing attraction in Minnesota.** Known for its outdoor scenery, the north shore of Lake Superior is rated across markets as the state's most appealing travel attraction. Prospective travelers are drawn in by descriptions of the lake and surrounding area's beauty: "This magnificent body of water looks like an ocean" and "gorgeous scenery and charming lakeside towns" captured their attention.
- 4. Most prospective travelers are familiar with the past year's news surrounding George Floyd's murder and Derek Chauvin's trial; nevertheless, about two-thirds of prospective travelers who are familiar with these events say they are not less likely to visit Minnesota because of them.** Furthermore, about five in six prospective travelers say their impression of Minnesota has not declined over the past year.
- 5. In spite of wide awareness, news stories around policing, inequality, and civil unrest are not top-of-mind associations with the state of Minnesota, and the vast majority still consider Minnesota to be a safe travel destination.** Prospective travelers primarily associate Minnesota with the natural beauty and opportunities offered by the state's outdoor scenery. Only 4% mention riots and civil unrest as top-of-mind associations. Furthermore, 88% regard Minnesota as a 'very' or 'somewhat' safe travel destination.



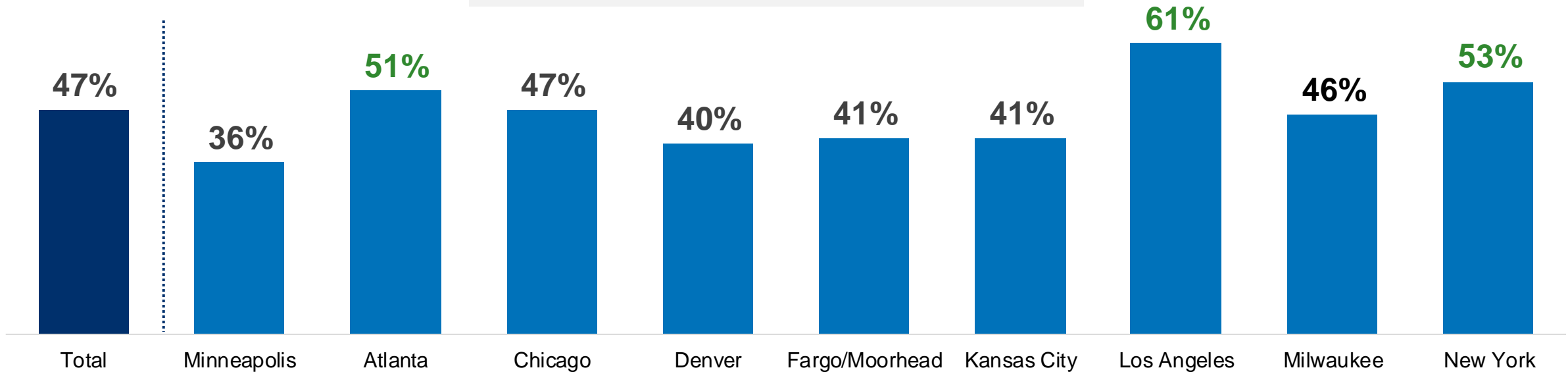
Detailed Findings

▶ 1. Vacation Plans in the World of COVID-19

About half of potential travelers are at least somewhat concerned about traveling in the next 12-18 months due to the COVID-19 pandemic.

- This concern is more widespread in some of the largest metro areas – Los Angeles, New York, and Atlanta, and among African Americans (white: 39% vs. African American: 58%).

Travel Concern (% Very/Somewhat Concerned)



Q14. Given the current status of the pandemic, how concerned are you about traveling in the next 12-18 months? (Total n=1718)

Sample sizes: Minneapolis, n=205; Atlanta, n=205; Chicago, n=205; Denver, n=204; Fargo/Moorhead, n=51; Kansas City, n=219; Los Angeles, n=205; Milwaukee, n=211; New York, n=213

Despite these concerns, however, the majority are ultimately comfortable traveling out of state. More are comfortable traveling than going to bars, sporting events, and movies.

- Only half of potential travelers are currently comfortable going to bars and clubs; however, those in Midwestern cities are more likely to be comfortable in those social settings.
- Atlanta and Milwaukee residents are more comfortable vacationing outside their state than Los Angeles and New York residents.

Activity Comfort* (% Very/Somewhat Comfortable)	M, MN	Atlanta	Chicago	Denver	F/M	KC	LA	M, WI	New York	
Spending time in-person with family and friends	94%	97%	96%	96%	92%	96%	94%	89%	96%	95%
Spending time in nature	94%	94%	91%	94%	95%	98%	93%	92%	95%	95%
Eating in restaurants	85%	84%	84%	85%	84%	85%	89%	76%	91%	84%
Traveling and vacationing outside of your home state	85%	85%	89%	84%	85%	89%	88%	79%	88%	80%
Attending in-person celebration[s] like a wedding or birthday	78%	79%	78%	77%	74%	85%	76%	74%	83%	76%
Going to movies, concerts, and cultural events indoors	67%	68%	65%	61%	66%	72%	76%	64%	72%	51%
Going to sporting events	64%	67%	66%	61%	62%	68%	68%	61%	71%	50%
Going to bars and clubs	53%	56%	50%	51%	50%	60%	56%	45%	63%	42%

Q13. Given the current status of the coronavirus pandemic, how comfortable do you feel doing each of the following? (F/M = Fargo/Moorhead; KC = Kansas City; LA = Los Angeles; M, WI = Milwaukee; M, MN = Minneapolis; n = total respondents) Sample sizes: Minneapolis, n=205; Atlanta, n=129; Chicago, n=131; Denver, n=173; Fargo/Moorhead, n=47; Kansas City, n=219; Los Angeles, n=205; Milwaukee, n=211; New York, n=213 *Smaller sample sizes due to update to survey language



Furthermore, there's a high level of interest in traveling: In spite of COVID-19 concerns, 94% are currently interested in vacationing outside their home state.

Activity Interest (% Very/Somewhat Interested)	M, MN	Atlanta	Chicago	Denver	F/M	KC	LA	M, WI	New York	
Spending time in-person with family and friends	96%	95%	98%	96%	96%	98%	96%	95%	96%	96%
Traveling and vacationing outside of your home state	94%	94%	95%	94%	93%	92%	96%	92%	94%	94%
Eating in restaurants	91%	89%	91%	90%	92%	86%	90%	89%	93%	93%
Spending time in nature	90%	91%	88%	88%	90%	92%	90%	88%	93%	87%
Attending in-person celebration[s] like a wedding or birthday	79%	80%	75%	78%	82%	84%	79%	77%	82%	79%
Going to movies, concerts, and cultural events indoors	75%	74%	77%	74%	79%	75%	77%	77%	77%	69%
Going to sporting events	63%	60%	62%	65%	64%	61%	68%	69%	64%	54%
Going to bars and clubs	50%	48%	53%	52%	51%	53%	46%	51%	51%	53%

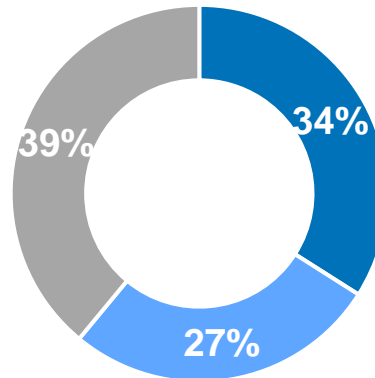


Q12. Currently, how interested are you in each of the following? (F/M = Fargo/Moorhead; KC = Kansas City; LA = Los Angeles; M, WI = Milwaukee; M, MN = Minneapolis; n = total respondents)
 Sample sizes: Minneapolis, n=205; Atlanta, n=205; Chicago, n=205; Denver, n=204; Fargo/Moorhead, n=51; Kansas City, n=219; Los Angeles, n=205; Milwaukee, n=211; New York, n=213

More than seven in 10 plan to travel at least as much next year as they did in the year before the pandemic, hinting at a big rebound for travel.

- There are exceptions to this: More than three in 10 residents in Los Angeles and New York plan to travel less often in the next year.

Frequency of Travel in the Next Year



- Plan to travel more often
- Plan to travel less often
- Plan to travel about the same



African Americans plan to travel more often in the next year (white: 31% vs. African American: 40%)

	M, MN	Atlanta	Chicago	Denver	F/M	KC	LA	M, WI	New York
Plan to travel more often	30%	40%	33%	30%	35%	35%	38%	34%	34%
Plan to travel about the same	45%	33%	40%	45%	37%	44%	29%	42%	33%
Plan to travel less often	25%	27%	26%	25%	27%	21%	33%	25%	32%



Q15. Compared to how often you traveled before the coronavirus pandemic reached the U.S. in March 2020, how often do you plan on traveling in the next year? (F/M = Fargo/Moorhead; KC = Kansas City; LA = Los Angeles; M, WI = Milwaukee; M, MN = Minneapolis; n = total respondents)

Sample sizes: Minneapolis, n=205; Atlanta, n=205; Chicago, n=205; Denver, n=204; Fargo/Moorhead, n=51; Kansas City, n=219; Los Angeles, n=205; Milwaukee, n=211; New York, n=213

▶ **2. What Travelers Are Looking for in a Vacation Destination**

Florida, California, New York, Texas, and Nevada are the states travelers are the most interested in visiting next. 6% mention Minnesota as a top state on their ‘want to visit next’ list.

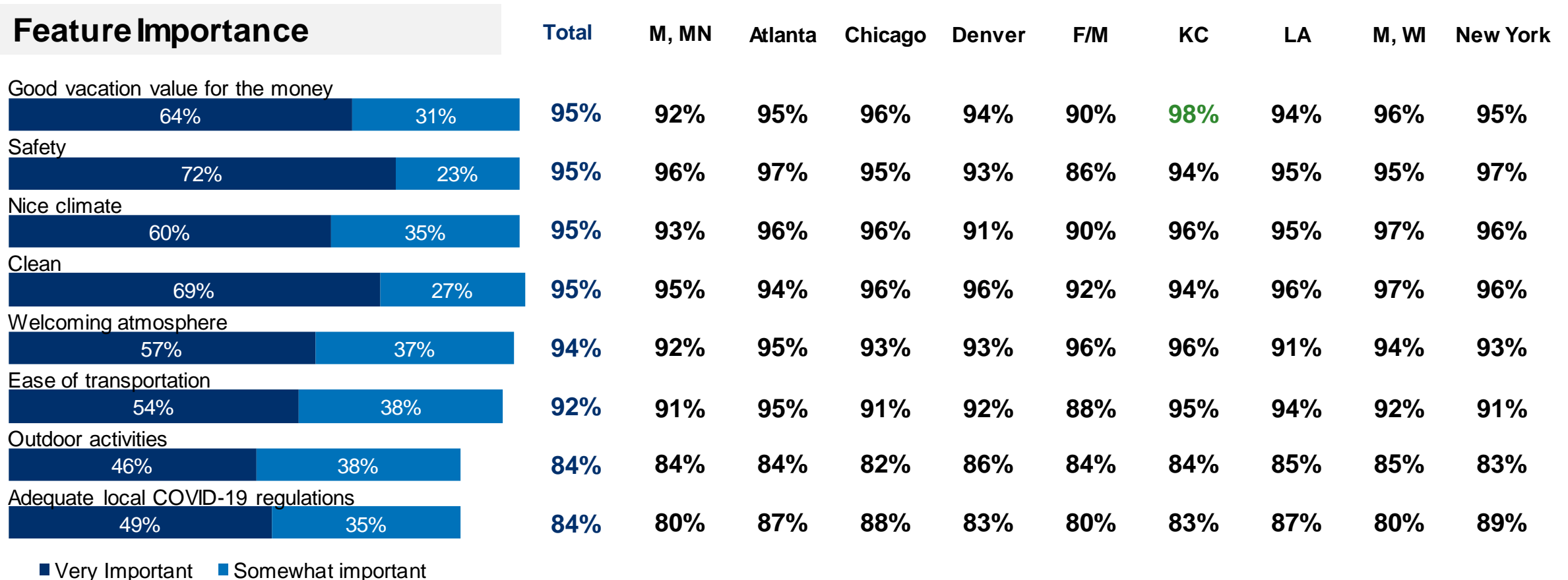
- More than one in 10 Minneapolis and Milwaukee residents and nearly a third of those in Fargo/Moorhead list Minnesota as one of their top five candidates for their next domestic vacation.

Top 5 States to Visit on Next Vacation

Rank	Total	Minneapolis	Atlanta	Chicago	Denver	Fargo/ Moorhead	Kansas City	Los Angeles	Milwaukee	New York
1	Florida: 44%	Florida: 47%	Florida: 55%	Florida: 48%	California: 47%	Florida: 39%	Florida: 44%	Nevada: 43%	Florida: 47%	Florida: 54%
2	California: 39%	California: 39%	California: 37%	California: 39%	Florida: 30%	Texas: 33%	California: 38%	New York: 41%	California: 39%	California: 40%
3	New York: 25%	New York & Texas: 19%	New York: 29%	New York: 22%	New York: 27%	Minnesota: 31%	Texas: 26%	California: 32%	New York: 20%	Texas: 21%
4	Texas: 22%	Nevada: 19%	Texas: 22%	Texas: 20%	Texas: 20%	California: 29%	Colorado: 26%	Florida: 31%	Texas: 20%	New Jersey: 20%
5	Nevada: 20%	Arizona & Wisconsin: 19%	Tennessee & North Carolina: 16%	Nevada & Wisconsin: 20%	Nevada: 19%	New York: 24%	New York: 24%	Hawaii: 21%	Arizona: 20%	New York & Nevada: 19%
	Minnesota: 6%	Minnesota: 14%	Minnesota: 2%	Minnesota: 4%	Minnesota: 2%		Minnesota: 5%	Minnesota: 1%	Minnesota: 11%	Minnesota: 2%

Travelers consider broad, general features such as value for the money, safety and climate of the destination, and cleanliness to be among the most important characteristics when selecting a vacation destination.

- More than six in 10 potential travelers consider safety, cleanliness, good vacation value for the money, and climate to be very important features when selecting a domestic travel destination .



Q17. How important are the following features when choosing a possible domestic travel destination? ((F/M = Fargo/Moorhead; KC = Kansas City; LA = Los Angeles; M, WI = Milwaukee; M, MN= Minneapolis; n=total respondents)

Sample sizes: Minneapolis, n=205; Atlanta, n=205; Chicago, n=205; Denver, n=204; Fargo/Moorhead, n=51; Kansas City, n=219; Los Angeles, n=205; Milwaukee, n=211; New York, n=213



Local culture/heritage and famous sites/museums are considered “very” or “somewhat” important for at least 8 in 10 future travelers when choosing a domestic travel destination.

- An exciting city nightlife resonates more among Atlanta and Los Angeles residents.
- Offering family-friendly activities and cultural diversity are less important to those living in Minneapolis.

Feature Importance	Total	M, MN	Atlanta	Chicago	Denver	F/M	KC	LA	M, WI	New York
Attractive local culture and heritage	83%	80%	85%	80%	86%	84%	83%	86%	80%	84%
Famous sites and museums	80%	78%	80%	76%	76%	80%	81%	87%	81%	83%
Family-friendly activities	77%	69%	80%	78%	72%	80%	78%	81%	81%	77%
Thriving local economy	77%	70%	82%	79%	73%	75%	73%	80%	77%	84%
Cultural diversity	69%	60%	69%	70%	72%	76%	67%	76%	64%	76%
Exciting nightlife	52%	44%	59%	52%	49%	55%	50%	60%	48%	54%
Sporting events	44%	38%	46%	47%	43%	51%	43%	47%	39%	43%

■ Very Important ■ Somewhat important

Q17. How important are the following features when choosing a possible domestic travel destination? (F/M = Fargo/Moorhead; KC = Kansas City; LA = Los Angeles; M, WI = Milwaukee; M, MN = Minneapolis; n = total respondents) Sample sizes: Minneapolis, n=205; Atlanta, n=205; Chicago, n=205; Denver, n=204; Fargo/Moorhead, n=51; Kansas City, n=219; Los Angeles, n=205; Milwaukee, n=211; New York, n=213



Though only a third consider cultural diversity as an important feature when choosing a vacation destination, over half of African American travelers consider it very important.

Feature Importance (% Very Important)

	White	African American	Net Difference Between African American and White Travelers
Good vacation value for the money	62%	69%	+7%
Welcoming atmosphere	54%	68%	+14%
Ease of transportation	52%	64%	+12%
Adequate local COVID-19 regulations	45%	59%	+14%
Family-friendly activities	40%	58%	+18%
Attractive local culture and heritage	32%	46%	+14%
Famous sites and museums	31%	45%	+14%
Cultural diversity	24%	54%	+30%
Thriving local economy	25%	43%	18%
Exciting nightlife	19%	41%	22%
Sporting events	14%	27%	13%



▶ **3. Perceptions of Minnesota as a Travel Destination**

When prospective travelers think about Minnesota, the state's famous lakes, cold and snowy winters, and beautiful natural scenery most frequently come to mind. Only a small percentage (4%) have a top-of-mind association between Minnesota and recent civil unrest.

Top of Mind Mentions of Minnesota	Total	M, MN	Atlanta	Chicago	Denver	F/M	KC	LA	M, WI	New York
Outdoor Mentions*	49%	66%	39%	44%	51%	71%	57%	39%	54%	34%
Land of Lakes/Lakes/ 10,000 Lakes/great Lakes	28%	52%	11%	28%	29%	61%	30%	16%	37%	10%
Cold/snow/winter	16%	13%	22%	11%	19%	6%	20%	16%	11%	17%
Nature/trees/stream/ mountains/scenery/green	11%	23%	9%	8%	9%	20%	11%	8%	10%	11%
Outdoor/outdoor activities (non-specific)	5%	9%	3%	6%	3%	12%	5%	3%	8%	3%
Fishing/ice fishing	3%	6%	--	5%	3%	8%	4%	1%	5%	--
Other Positive/Neutral Mentions*	44%	50%	37%	42%	40%	45%	46%	39%	53%	46%
Good/great state/fun (general)	9%	5%	7%	10%	10%	8%	5%	13%	10%	12%
Sports/football/basketball/Minnesota Vikings	7%	6%	8%	4%	7%	8%	8%	3%	10%	6%
Mall of America/malls	7%	8%	1%	9%	3%	6%	12%	1%	14%	4%
Beautiful/beauty	6%	8%	4%	--	5%	8%	8%	7%	3%	7%
Country/country living/ rural/farming	3%	3%	5%	2%	5%	2%	2%	4%	1%	5%
Friendly/nice people/ family friendly	3%	8%	2%	2%	2%	4%	1%	1%	4%	3%
Clean/clean air	3%	5%	1%	3%	3%	--	1%	2%	2%	4%
Twin Cities	3%	2%	2%	4%	2%	4%	5%	--	6%	6%
Negative Mentions*	7%	8%	7%	10%	9%	4%	7%	7%	7%	5%
Riots/Civil unrest	4%	5%	6%	6%	5%	--	4%	3%	4%	4%

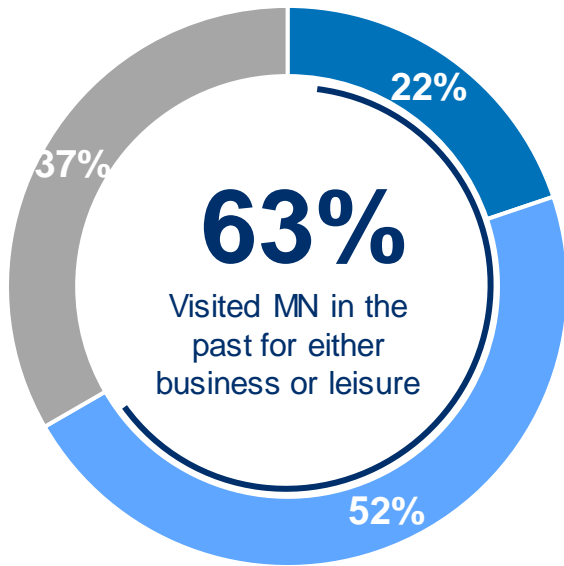
Q19. What words, images, or phrases come to mind when you first think of Minnesota? (F/M = Fargo/Moorhead; KC = Kansas City; LA = Los Angeles; M, WI = Milwaukee; M, MN = Minneapolis; n=total respondents) Sample sizes: Minneapolis, n=205; Atlanta, n=205; Chicago, n=205; Denver, n=204; Fargo/Moorhead, n=51; Kansas City, n=219; Los Angeles, n=205; Milwaukee, n=211; New York, n=213

*Top of mind words, images or phrases mentioned less than 3% of the time not shown



More than six in 10 have visited Minnesota in the past with the majority having a positive experience.

Past Visits to Minnesota



- Yes, for business
- Yes, for personal or leisure travel
- No

Last Trip to Minnesota Experience

79%: Total Positive Experience



	M, MN	Atlanta	Chicago	Denver	F/M	KC	LA	M, WI	New York
Excellent/good	87%	78%	80%	65%	90%	77%	80%	80%	74%
Average	7%	17%	16%	26%	6%	18%	16%	16%	23%
Fair/poor	5%	5%	4%	8%	4%	4%	3%	3%	4%

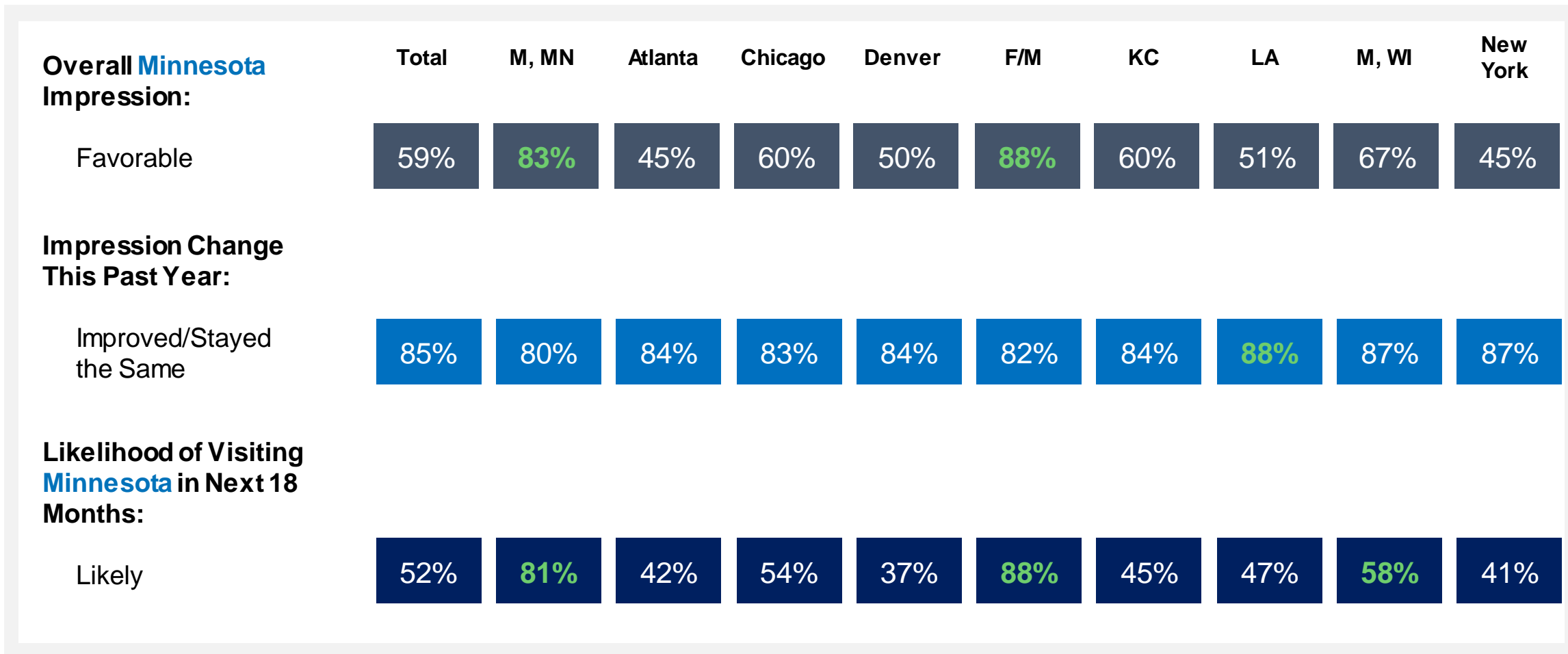
Q29. Have you ever visited Minnesota?

Q30. How would you rate your last trip to Minnesota? (F/M = Fargo/Moorhead; KC = Kansas City; LA = Los Angeles; M, WI = Milwaukee; M, MN = Minneapolis; n=total respondents)

Sample sizes: Minneapolis, n=202; Atlanta, n=86; Chicago, n=137; Denver, n=121; Fargo/Moorhead, n=48; Kansas City, n=141; Los Angeles, n=91; Milwaukee, n=176; New York, n=80



A majority in most markets have a favorable impression of Minnesota and just over half are likely to visit the state for vacation, particularly those residing in the Midwest.



Q20. Overall, what is your impression of Minnesota as a domestic leisure travel destination?

Q21. Has your impression of Minnesota as a travel destination improved, declined or stayed the same over the past year?

Q22. How likely are you to visit Minnesota as a domestic leisure travel destination in the next 18 months? (F/M = Fargo/Moorhead; KC = Kansas City; LA = Los Angeles; M, WI = Milwaukee; M, MN = Minneapolis)

Total n=1718)

Sample sizes: Minneapolis, n=205; Atlanta, n=205; Chicago, n=205; Denver, n=204; Fargo/Moorhead, n=51; Kansas City, n=219; Los Angeles, n=205; Milwaukee, n=211; New York, n=213



Though most prospective travelers have a favorable impression of Minnesota, those residing further away have a less favorable view of the state.

- Prospective travelers who are white have a more favorable impression of the state than those who are African American (white: 61% vs. African American: 52%).

Overall Minnesota Impression

	Total	Minneapolis	Atlanta	Chicago	Denver	Fargo/Moorhead	Kansas City	Los Angeles	Milwaukee	New York
Favorable	59%	83%	45%	60%	50%	88%	60%	51%	67%	45%
Very Favorable	29%	55%	23%	29%	21%	45%	24%	27%	29%	21%
Somewhat Favorable	30%	28%	22%	31%	29%	43%	37%	24%	38%	24%
Unfavorable	14%	8%	20%	15%	16%	4%	14%	17%	8%	14%
Somewhat Unfavorable	7%	3%	10%	8%	6%	2%	8%	7%	3%	8%
Very Unfavorable	7%	5%	11%	6%	9%	2%	6%	10%	5%	6%
Neutral	28%	9%	34%	26%	34%	8%	26%	32%	25%	41%

Impression of Minnesota remained the same or improved over the last year for the majority in key markets. Only 15% say their impression of the state has declined.

Minnesota Impression Change Over Last Year

	Total	Minneapolis	Atlanta	Chicago	Denver	Fargo/Moorhead	Kansas City	Los Angeles	Milwaukee	New York
Improved	23%	21%	27%	23%	19%	33%	16%	29%	23%	22%
Stayed the Same	62%	59%	57%	60%	65%	49%	68%	59%	64%	65%
Declined	15%	20%	16%	17%	16%	18%	16%	12%	13%	13%



Q21. Has your impression of Minnesota as a travel destination improved, declined or stayed the same over the past year?

Sample sizes: Minneapolis, n=205; Atlanta, n=205; Chicago, n=205; Denver, n=204; Fargo/Moorhead, n=51; Kansas City, n=219; Los Angeles, n=205; Milwaukee, n=211; New York, n=213

Value for the money, cleanliness, climate, safety, welcoming atmosphere, and ease of transportation are the key features that positively impact the likelihood to visit Minnesota.

Feature Impact on Likelihood to Visit Minnesota






-  Good vacation value for the money
-  Clean
-  Nice climate
-  Safety
-  Welcoming atmosphere
-  Ease of transportation

Sorted by features having the highest impact on likelihood to visit Minnesota

We conducted a key driver analysis to predict the features considered “very important” by prospective travelers and the impact on likelihood to visit Minnesota in the next 18 months.

The north shore of Lake Superior is considered across markets to be Minnesota's most appealing attraction.

- The Mall of America is also appealing for many prospective out-of-state travelers.
- African Americans consider Mall of America to be Minnesota's most appealing attraction. When compared directly to white potential travelers, the AA audience is significantly higher (white: 14%, African American: 40%).

Most Appealing Attraction (% Ranked 1st)	M, MN	Atlanta	Chicago	Denver	F/M	KC	LA	M, WI	New York
North Shore of Lake Superior  33%	48%	28%	30%	32%	41%	34%	27%	30%	31%
Mall of America  19%	9%	23%	24%	19%	12%	19%	19%	23%	19%
The Great Outdoors  18%	14%	18%	19%	21%	14%	15%	22%	13%	21%
The Twin Cities of Minneapolis-St. Paul and surrounding area  16%	14%	16%	16%	12%	20%	16%	16%	18%	19%
Central Minnesota Resorts/Lake Life  14%	15%	15%	11%	16%	14%	16%	15%	16%	9%

Q23. Please rank the following attractions in order of how appealing they are to you as a traveler, where #1 is the most appealing and the attraction ranked #5 is the least appealing? (F/M = Fargo/Moorhead; KC = Kansas City; LA = Los Angeles; M, WI = Milwaukee; M, MN = Minneapolis; n = total respondents)

Sample sizes: Minneapolis, n=205; Atlanta, n=205; Chicago, n=205; Denver, n=204; Fargo/Moorhead, n=51; Kansas City, n=219; Los Angeles, n=205; Milwaukee, n=211; New York, n=213



Prospective travelers are most enticed by language describing the beauty of Minnesota's lakes. Each attraction's activities and landmarks resonated as well.



North Shore of Lake Superior

- “This **magnificent body of water looks like an ocean...**”
- “...the **largest freshwater lake** in the country...”
- “...**gorgeous scenery** and **charming lakeside towns...**”
- “continue your journey up the **North Shore Scenic Byway...**”



The Great Outdoors

- “Minnesota is home to some of the **America's most beautiful and remote places**, including the **Boundary Waters Canoe Area Wilderness [BWCAW], Voyageurs National Park, 75 state parks and recreation areas**, and the headwaters of the **Mississippi River.**”
- “...covering more than 1 million acres, **1,100 lakes...**”



Central Minnesota Resorts / Lake Life

- “Discover a land of **pristine lakes and wooded hills...**”
- “Central Minnesota is dotted with **crystalline lakes, rivers and streams**, perfect for **fishing, boating, paddling and waterskiing.**”



Words and phrases that were highlighted most frequently



Words and phrases that were highlighted often, but not most frequently

Travelers who are the most interested in the Mall of America are drawn to its tax-free shopping opportunities and wide variety of activities. Similarly, the broad array of cultural and urban activities are appealing aspects of the Twin Cities.




Mall of America


- "...home to **tax-free shopping** at more than **520 stores**, **60 restaurants**, a theme park, **Minnesota's largest aquarium** and a **13-screen movie theater**..."
- "Mall of America has two **on-site hotels**, the JW Marriott and Radisson Blu."



The Twin Cities of Minneapolis-St. Paul







- "...an incredibly **rich and diverse area** with **dramatic skylines**, **exciting pro sports**, **award-winning theater**, **world-class museums** and **cultural attractions** like the **Walker Art Center** and **Prince's Paisley Park**, **renowned restaurants** and a booming craft beverage scene.
- "Revel in the **natural beauty of award-winning parks, trails and waterways**..."

 Words and phrases that were highlighted most frequently

 Words and phrases that were highlighted often, but not most frequently

The vast majority of prospective travelers across markets are “very” or “somewhat” familiar with at least one of the recent stories about policing, inequality, or civil unrest coming out of Minnesota.

- Prospective travelers are most familiar with news stories related to George Floyd’s death and the Derek Chauvin trial and verdict. Those living in or near Minnesota are the most likely to be familiar with these stories.

News Familiarity (% Very/Somewhat Familiar)	M, MN	Atlanta	Chicago	Denver	F/M	KC	LA	M, WI	New York
George Floyd’s death  74%	89%	71%	71%	71%	84%	73%	65%	80%	68%
The Derek Chauvin trial and verdict  62%	83%	56%	56%	60%	76%	62%	52%	68%	58%
Civil unrest  56%	78%	46%	55%	50%	65%	56%	43%	65%	54%
Debate around the future of policing  47%	71%	43%	40%	47%	59%	50%	34%	51%	39%
Daunte Wright’s death  40%	77%	39%	35%	36%	43%	36%	32%	35%	32%
None of the above  10%	4%	14%	11%	12%	6%	11%	15%	4%	11%

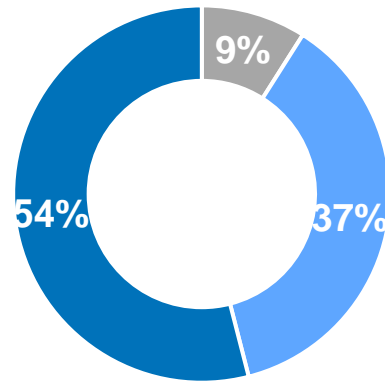
Q26. Which of the following news stories coming out of Minnesota in the last year are you familiar with? Select all that apply. (F/M = Fargo/Moorhead; KC = Kansas City; LA = Los Angeles; M, WI = Milwaukee; M, MN = Minneapolis; n=total respondents)
 Sample sizes: Minneapolis, n=205; Atlanta, n=205; Chicago, n=205; Denver, n=204; Fargo/Moorhead, n=51; Kansas City, n=219; Los Angeles, n=205; Milwaukee, n=211; New York, n=213



Just over half of those aware of the George Floyd story say the news has not impacted their likelihood to visit Minnesota; however, 37% say it has made them less likely to visit the state.

- Chicago, Kansas City, and Los Angeles residents are the most likely to say the news story has negatively impacted their desire to visit the state.

George Floyd News Story's Impact on Likelihood to Visit Minnesota



- Made me more likely to visit Minnesota
- Made me less likely to visit Minnesota
- Did not impact my likelihood to visit Minnesota



White prospective travelers were more likely to say the news did not impact their likelihood to visit Minnesota (white: 59% vs. African American: 42%)

	M, MN	Atlanta	Chicago	Denver	F/M	KC	LA	M, WI	New York
Made me more likely to visit Minnesota	5%	18%	9%	9%	7%	6%	13%	7%	10%
Made me less likely to visit Minnesota	26%	38%	41%	37%	33%	43%	43%	36%	35%
Did not impact my likelihood to visit Minnesota	69%	44%	50%	54%	60%	52%	44%	57%	55%

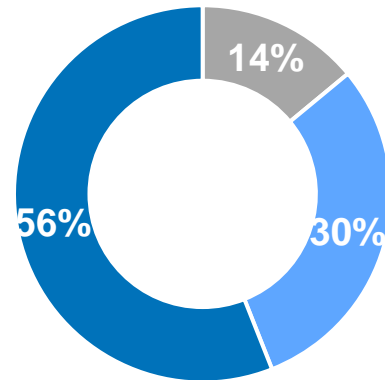
Q27. You indicated you heard news about George Floyd's death. Did this news story impact your likelihood to visit Minnesota? (F/M = Fargo/Moorhead; KC = Kansas City; LA = Los Angeles; M, WI = Milwaukee; M, MN = Minneapolis; n = total respondents)

Sample sizes: Minneapolis, n=182; Atlanta, n=146; Chicago, n=146; Denver, n=144; Fargo/Moorhead, n=43; Kansas City, n=160; Los Angeles, n=134; Milwaukee, n=169; New York, n=145




Similarly, just over half of those aware of the Derek Chauvin trial/verdict say the news did not impact their likelihood to visit Minnesota; however, about one in three living outside of Minnesota say it made them less likely to visit the state.

Derek Chauvin Trial/Verdict's Impact on Likelihood to Visit Minnesota



- Made me more likely to visit Minnesota
- Made me less likely to visit Minnesota
- Did not impact my likelihood to visit Minnesota

 Compared to white prospective travelers, African Americans are more likely to visit Minnesota after learning about the Derek Chauvin trial/verdict (white: 12% vs. 21%)

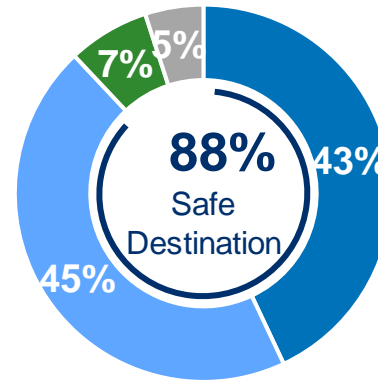
	M, MN	Atlanta	Chicago	Denver	F/M	KC	LA	M, WI	New York
Made me more likely to visit Minnesota	11%	16%	4%	11%	13%	15%	19%	12%	16%
Made me less likely to visit Minnesota	20%	36%	32%	30%	26%	35%	37%	29%	29%
Did not impact my likelihood to visit Minnesota	69%	48%	54%	59%	62%	49%	44%	59%	55%

Q27. You indicated you heard news about Derek Chauvin's trial, how did the verdict impact your likelihood to visit Minnesota? (F/M = Fargo/Moorhead; KC = Kansas City; LA = Los Angeles; M, WI = Milwaukee; M, MN = Minneapolis; n=total respondents)
 Sample size: Minneapolis, n=171; Atlanta, n=114, Chicago; n=114; Denver, n=122; Fargo/Moorhead, n=39; Kansas City, n=136; Los Angeles, n=106; Milwaukee, n=143; New York, n=124



The vast majority of prospective travelers consider Minnesota to be a safe travel destination, indicating that recent news hasn't affected safety perceptions of the state.

Minnesota Safety Assumptions



- Very safe travel destination
- Somewhat safe travel destination
- Not too safe travel destination
- Not a safe travel destination at all

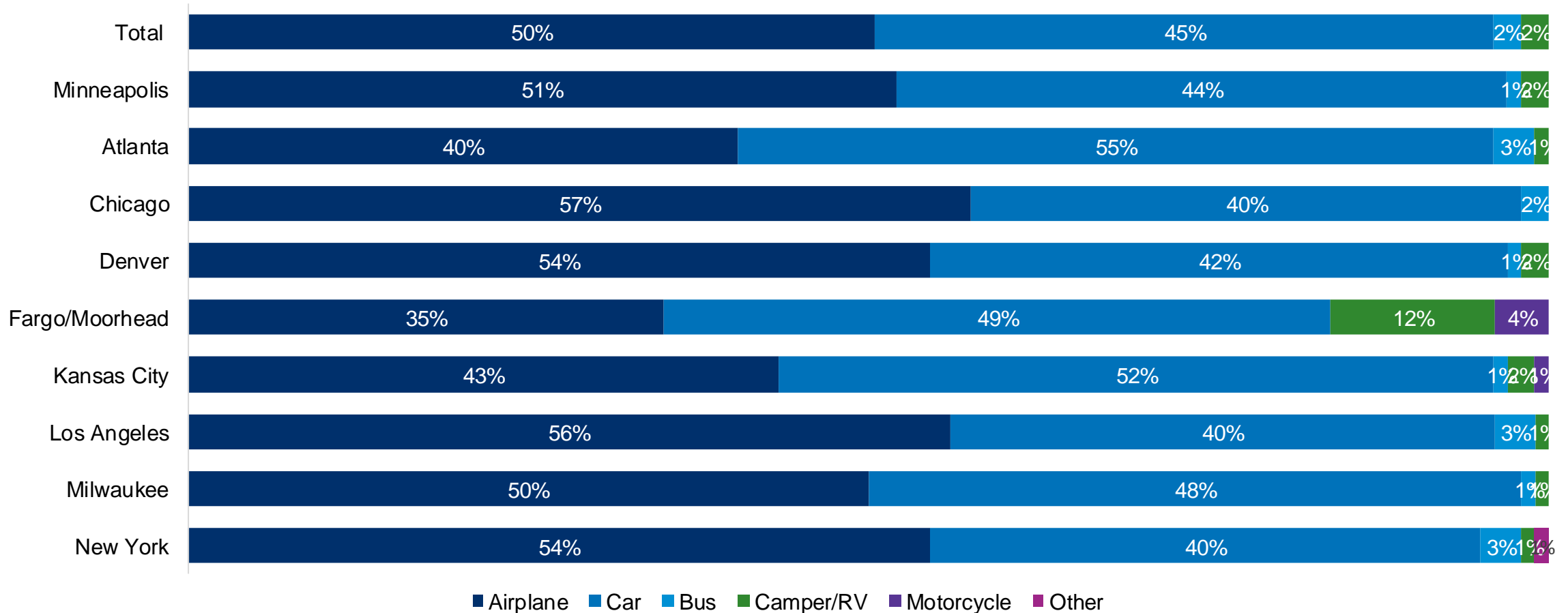
	M, MN	Atlanta	Chicago	Denver	F/M	KC	LA	M, WI	New York
Very safe travel destination	58%	38%	42%	39%	65%	39%	38%	44%	39%
Somewhat safe travel destination	34%	46%	48%	49%	27%	47%	46%	45%	51%
Not too safe travel destination	3%	10%	6%	7%	8%	8%	11%	6%	6%
Not a safe travel destination at all	4%	6%	3%	5%	--	5%	4%	5%	4%

Q25. Do you consider Minnesota to be: a very safe travel destination, a somewhat safe travel destination, a not too safe travel destination, or a not safe travel destination at all? (F/M = Fargo/Moorhead; KC = Kansas City; LA = Los Angeles; M, WI = Milwaukee; M, MN = Minneapolis; n = total respondents)
 Sample sizes: Minneapolis, n=205; Atlanta, n=205; Chicago, n=205; Denver, n=204; Fargo/Moorhead, n=51; Kansas City, n=219; Los Angeles, n=205; Milwaukee, n=211; New York, n=213



Most plan to travel to their next vacation destination by airplane or car. More in Atlanta, Fargo/Moorhead, and Kansas City plan to travel by car; in the remaining cities more plan to travel by plane.

Planned Mode of Transport for Next Domestic Vacation

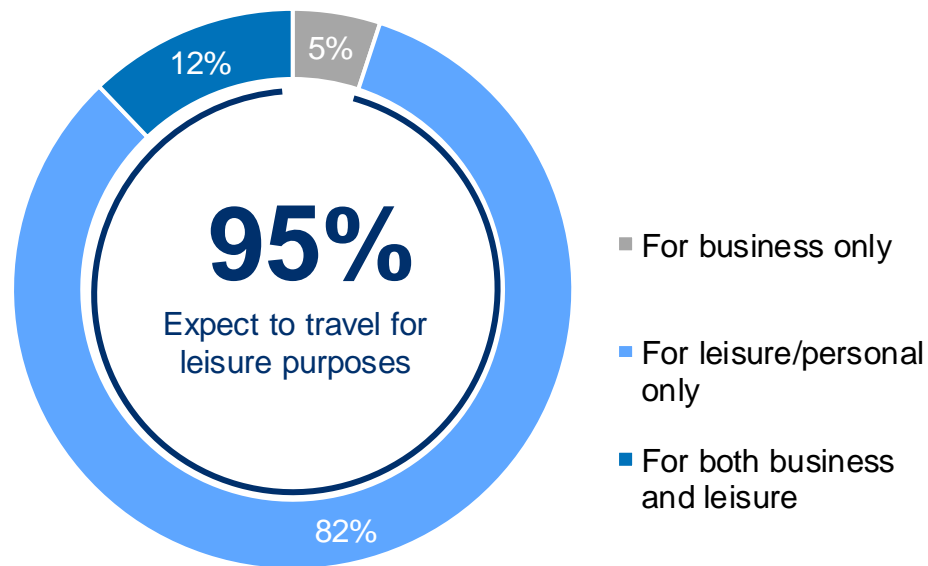


Q8. For your next domestic vacation, do you expect to travel by:
 Sample sizes: Minneapolis, n=205; Atlanta, n=205; Chicago, n=205; Denver, n=204; Fargo/Moorhead, n=51; Kansas City, n=219; Los Angeles, n=205; Milwaukee, n=211; New York, n=213

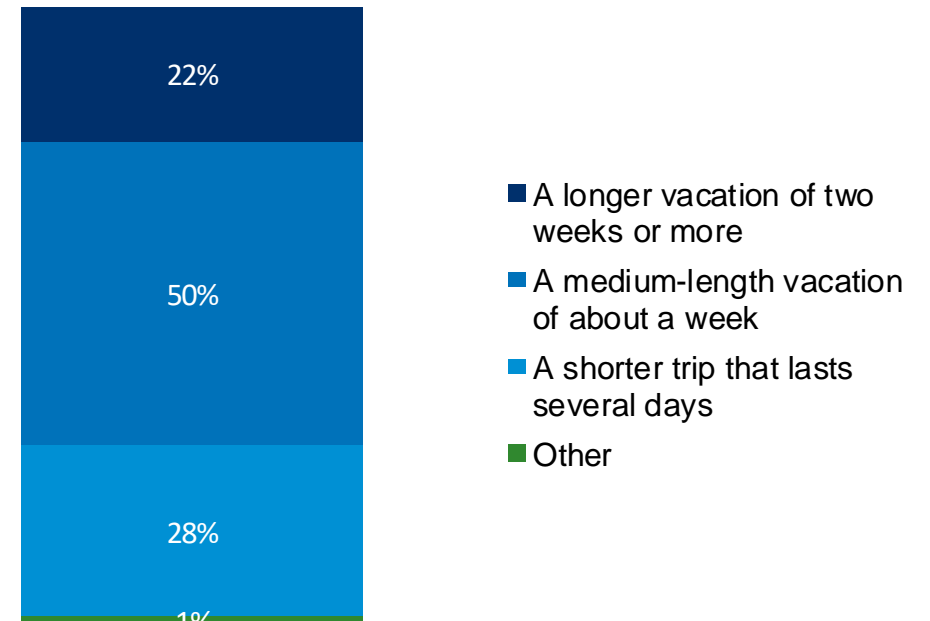
The vast majority say their next domestic trip will be for leisure rather than business purposes. Most expect the length of their next trip will be a week or less.

- Over a quarter of Atlanta (27%), Los Angeles (29%), and New York (27%) residents expect their next domestic vacation to last two weeks or more.

Purpose of Next Domestic Trip



Length of Next Domestic Vacation



Q9. Which of the following best describes your next domestic trip?

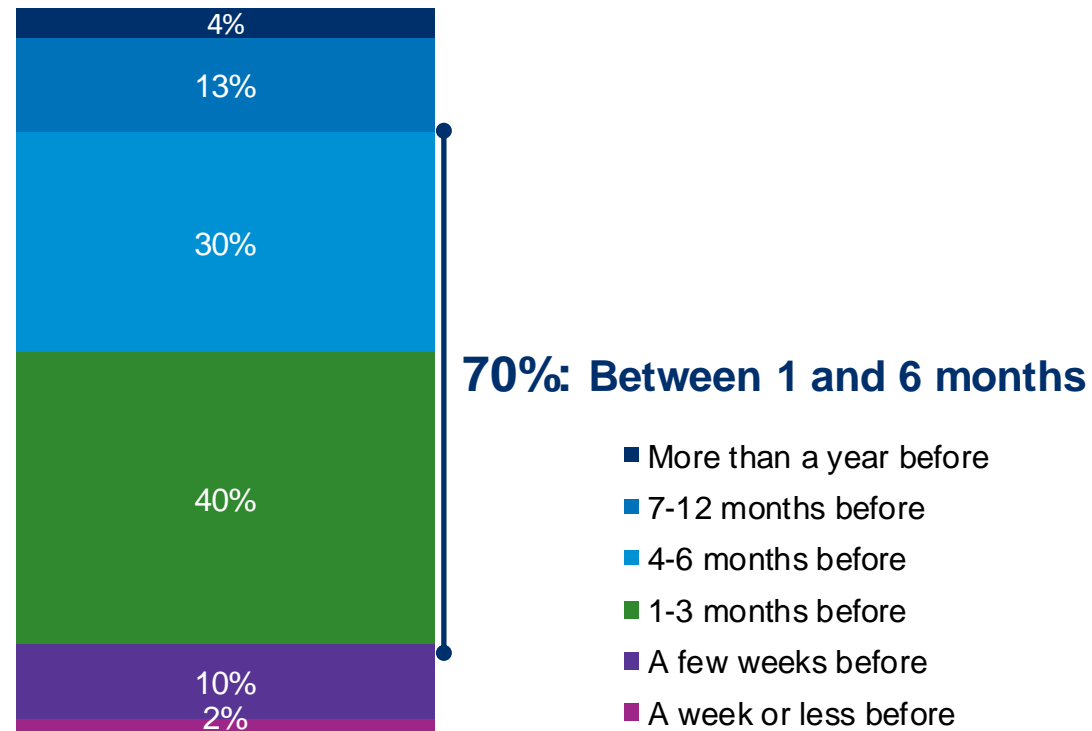
Q10. For your next domestic vacation, are you planning to take:

Sample sizes: Minneapolis, n=205; Atlanta, n=205; Chicago, n=205; Denver, n=204; Fargo/Moorhead, n=51; Kansas City, n=219; Los Angeles, n=205; Milwaukee, n=211; New York, n=213



The majority are medium-term vacation planners, with seven in 10 saying they plan their vacations 1-6 months prior to departure.

Leisure Trips Planning Period



Q11. How early do you normally plan your leisure trips?

Sample sizes: Minneapolis, n=196; Atlanta, n=191; Chicago, n=193; Denver, n=196; Fargo/Moorhead, n=49; Kansas City, n=208; Los Angeles, n=191; Milwaukee, n=199; New York, n=206

▶ **Going Forward**

LOOKING AHEAD: 2022 GOALS

Move Minnesota forward

Own the story of 2020-2021 and the challenges faced in our communities, in the pandemic, and in the travel and tourism industry.

Pivot to a forward-looking agenda and a comeback for the state and industry.

Themes:

- Last minute getaways and longer lead bucket list trips.
- New places, new faces

Position the state in the national travel conversation

Establish new contacts and connections with top-tier national media and focus pitching efforts on national outlets.

Themes:

- The arts, entertainment and cultural center of the Twin Cities next to nature and outdoor activities.
- Heritage and unexpected experiences in Greater Minnesota.

Reach new audiences

Engage new or underutilized groups across demographics and locations. Prioritize diversity in pitching activity, both in the businesses promoted and audiences targeted.

Themes:

- A great place for connecting and reconnecting – Welcoming and engaging in all the multitude of communities MN has to offer.
- Surprising, unexpected, and new destinations across Minnesota.
- Dual focus on family-friendly value and upscale offerings statewide.

Drive coverage in key regional markets

When travelers in neighboring Midwest states and cities consider regional destinations, Minnesota should be top of mind.

Themes:

- The unique offering of the arts, entertainment and cultural center of the Twin Cities next to nature and outdoor activities.
- Dual focus on family-friendly value and upscale offerings statewide.
- Outdoor recreation in Greater Minnesota.