Last week, Explore Minnesota reached out to the Minnesota tourism industry with invitations to take the fourth in an ongoing series of short surveys. Responses to these surveys provide Explore Minnesota with important insights about how we can support the industry throughout the COVID-19 crisis.

Results to the fourth (i.e., April 28-30) survey reflect accumulating levels of recent business losses. New questions in this survey solicited feedback on specific support measures Explore Minnesota is considering, or has already implemented, and asked respondents to share what they are doing to safely welcome visitors. Respondents cited many creative methods they are taking to protect customers and themselves, reflecting the importance they place on implementing safety measures and effectively communicating about them.

Explore Minnesota will modify and repeat this short, informal survey in the weeks and months ahead to ensure our industry support during the pandemic remains timely and useful to industry members. To date, the four surveys have received most of their responses during the following periods: March 18-20, March 25-27, April 7-9 and April 28-30.
Explore Minnesota’s Industry Support; Business Safety Measures

Feedback on Explore Minnesota’s Existing Support Measures; Input for New Ones

Current support: Please consider the following ways Explore Minnesota currently supports the tourism industry. Then, rate the importance of each to you right now.

• Among a list of seven ways Explore Minnesota currently supports the tourism industry, the general marketing and awareness campaign and the public relations campaign for consumers received the highest ratings for importance to respondents.

• Many respondents consider it important to stay focused, with appropriate timing and sensitivity, on messaging that emphasizes that we are open and ready to serve in a safe manner.

• In a similar direction, one respondent offered: “It’s easy to bog down a good message with too much information. Keep messaging to the public light, but heartfelt and caring; focus in on understanding their desire for ‘vacation normalcy’ and talk about what’s still the same in Minnesota. The loons are still calling, the northern lights still shine, sunsets are still stunning, and your getaway will still touch your heart and soothe your soul.”

• It is clear that many respondents are looking to Explore Minnesota to provide direction on matters ranging from marketing to financial relief to health and safety. This puts the onus on the Explore Minnesota to be as clear as possible about what we are and are not in a position to do, and to connect the industry with other organizations and resources as best as possible for topics where that is the best and most appropriate role we can play.
Facebook Group interest: If Explore Minnesota were to set up a private Facebook Group for Minnesota’s tourism industry, how likely would you be to participate in it?

- One quarter (26%) of respondents would be extremely likely to participate in a private Facebook Group for Minnesota’s tourism industry.
- Two thirds (67%) of respondents replied with at least a “4” on a 6-point scale, indicating they would be more likely than not to participate.
Conference call presenters: To date, Explore Minnesota has hosted two industry-wide conference calls covering: 1) the impacts of COVID-19 on Minnesota’s tourism industry; and 2) a presentation by DEED on DEED and Small Business Administration (SBA) programs. For future industry-wide conference calls or other information exchanges, please rate your level of importance in hearing from presenters in the following categories:

- Among four categories of possible presenters for future industry-wide calls, respondents were most interested in hearing from tourism and hospitality businesses in their industry sector and region.
- Based on the ratings alone, it appears that many respondents find industry-wide conference calls to be an important and valuable way of receiving information on varying topics.
- Still, “other” comments provided for this question addressed information delivery that extended beyond the specifics of the question, and identified shortcomings. Two themes that emerged from those comments were that: 1) respondents are feeling deluged with too much news and information to absorb; and 2) related, information should be focused as much as possible on specific, relevant topics and delivered concisely in ways that are easy to access.
- Specific comments that address the above: 1) “There are just so many organizations doing these webinars that with all the spring work to do I am really losing interest in these quickly.” 2) “My attention span is short these days. I prefer facts and to the point things that I can use. I like hearing ideas from others and being able to use them that bests fits our area. Short and sweet.”
Two new open-ended questions asked businesses and organizations what steps they are taking to safely welcome visitors/customers, and what they are doing to demonstrate and share the measures with customers and potential customers.

Responses to these questions make it clear that the industry is diligently following official health and safety guidance to do what they can to protect their customers and, importantly, themselves. Responses went well beyond the basics that include protective equipment and disinfecting measures, and exhibited a high level of concern and creativity.

Many lodging properties noted changes that allow units to sit idle for as many as three days between different groups, in addition to heightened disinfectant cleaning. Unnecessary items are being removed from units to reduce the number of problematic surfaces. Some respondents are asking their customers to bring their own linens. Respondents cited various ways they are minimizing contact between staff and customers, and between different groups of customers. Among these were encouraging or requiring contactless electronic payments, greeting customers outside the office at arrival or not at all, scheduling check-in and check-out times, and maintaining limited or no office hours.

Many respondents cited extraordinary measures they are taking to inform and reassure customers and potential customers that their business is clean and safe, and that they are putting the customer’s safety concerns front and center of their operation. Formats for doing this range from social media and emails to old-fashioned methods like mail and phone calls.
In previous iterations of this survey, Explore Minnesota has used a single open-ended question to solicit ideas for how we can best support the industry through the COVID-19 crisis. Many respondents provided thoughtful ideas that have informed recent adjustments to Explore Minnesota programs and services. Complete reports of results for those surveys, including summaries of comments, can be found on the research/reports page of Explore Minnesota’s industry website, under the “COVID-19 Survey Results” option. Some of the thoughts and suggestions that emerged from the three previous surveys include:

**Under Marketing Messages and Timing**
1. Continue advertising in a sensitive manner, to keep travel on consumers’ minds
2. Hit pause on more substantial marketing, until conditions improve
3. Promote what’s still available
4. Hope on the horizon

**Communications** – Serve as a conduit for important information about wide-ranging COVID-19 related topics. Explore Minnesota’s industry website remains an important vehicle for this, including a newly-created Coronavirus (COVID-19) page that serves as a gateway to a broad spectrum of tourism industry-relevant information and resources.

**Under Business Assistance/Financial Relief**
1. Direct businesses and organizations to places they can receive help navigating issues like when they should be open/closed and staffing/employment/unemployment concerns
2. Advocate for forgivable loans and grants, plus other measures to help mitigate financial problems
3. Compensate businesses and organizations for financial losses from mandated event cancellations and retaining employees
4. Ease requirements on (Explore Minnesota) grants
5. Advocating for financial relief, including postponing or forgiving upcoming property tax payments and suspending sales tax on travel-related goods and services

**Disclaimer:** Explore Minnesota is committed to supporting the industry with financial relief as much as possible, however, as a state government entity, Explore Minnesota is limited in its capacity to provide or advocate for funds. As such, Explore Minnesota’s role should be viewed primarily as one of marketing the state for travel and supporting the industry through existing programs and communications. We will be as responsive as possible to evolving industry needs within the boundaries of our legal capacity.

Previously Collected Industry Input Still Highly Relevant
Impacts, Operational Status and Plans for Re-opening

Two survey questions assessed respondents’ recent and projected business conditions compared with last year, both for revenue/sales and customer traffic/total customers. Because results were quite similar for the revenue and customers, graphs of both previous and projected business activity display just revenue results. Graphs provide a comparison of results for all COVID-19 survey results to date.

Recent activity:

• Business losses continue to accumulate for survey respondents, with more than seven of 10 April 28-30 respondents reporting that recent business activity (i.e., over the last 30 days) was down by at least 51%, compared with a year ago. This was the case for both revenue (-70%) and customers (-72%).

• Furthermore, just over a third (34%) of respondents reported recent business to be down 100% (i.e., no recent business during the last 30 days). This category saw the biggest increase since the previous survey, up six points from 28%.
Recent Sales/Revenue: How was business activity at your business or organization over the last 30 days, compared to the same period a year earlier?

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**Projected activity:**

- Among the few bright spots in April 28-30 survey results was a 13.5-point reduction in the portion of respondents expecting revenue to be down 100% in the upcoming 30 days.
- This reduction was accompanied by five-point increases in both the “lower by 26% to 50%” and “lower by 51% to 99%” categories.

**Projected Sales/Revenue:** What are your projections for business activity at your business or organization for the upcoming 30 days, compared with the same period a year earlier?

<table>
<thead>
<tr>
<th>Percentage of Respondents</th>
<th>March 18-20</th>
<th>March 25-27</th>
<th>April 7-9</th>
<th>April 28-30</th>
</tr>
</thead>
<tbody>
<tr>
<td>Higher</td>
<td>15.1</td>
<td>1.3</td>
<td>1.9</td>
<td>1.3</td>
</tr>
<tr>
<td>Little or no change</td>
<td>6.6</td>
<td>1.8</td>
<td>3.3</td>
<td>0.9</td>
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<tr>
<td>Lower, by up to 10%</td>
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<td>3.8</td>
<td>4.9</td>
<td>6.3</td>
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<tr>
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<td>7.6</td>
<td>8.2</td>
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<tr>
<td>Lower, by 26% to 50%</td>
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<td>41.7</td>
<td>47.1</td>
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</tr>
<tr>
<td>Lower, by 51% to 99%</td>
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<td>34.8</td>
<td>21.3</td>
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<tr>
<td>Lower, by 100% (No projected business)</td>
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<td>9.4</td>
<td>6.9</td>
<td>6.3</td>
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<tr>
<td>Don't know/Not applicable</td>
<td>0.5</td>
<td>0.9</td>
<td>0.9</td>
<td>0.6</td>
</tr>
</tbody>
</table>
Operational status: Please check the category that best describes the status of your business or organization, as best as you can say right now.

- Among the 37% of April 28-30 respondents whose businesses or organizations were operational at the time of this survey, most (26% of total responses) were only partially operational.
- Four in 10 respondents (40%) represented businesses or organizations experiencing an unplanned closure. Among them, more than half (21% of total responses) of this group indicated responded that it is not at all clear when they will reopen. Planned reopening dates for the remainder of this group vary greatly.
Anticipated length of time before business activity improves:
• Compared with previous survey periods, April 28-30 respondents think it will now be longer before they will start to see an improvement in their business activity.
• More than half of respondents think it will be more than three months before business improves, up 12 points from April 7-9.
• Within this group, nearly one in five (19%) think it will be more than 12 months before they start to see business improve, up nine points since April 7-9.

Based on the information available to you today, how long do you think it will be before you start to see an improvement in your business activity?
Who responded to the survey?

- On Monday, April 27, notice and a link to the most recent survey was included in Explore Minnesota’s EMT Express e-newsletter. Based on a very low initial response rate, a separate survey invitation was included in an email message delivered to the approximately 7,500 Minnesota tourism businesses and organizations on the EMT Express list on April 7.
- An email reminder was also sent to this same list on April 30. The 438 responses represent a 6% response rate for this informal survey effort. This compares with 559 responses April 7-9, 458 responses March 25-27 and 674 responses March 18-20.
- Lodging and campground businesses represented the largest group of April 28-30 survey respondents, with 42% of respondents. Chambers/CVBs/tourism organizations (14%), attractions (13%) and events/festivals (6%) also accounted for numerous responses.
- Attractions respondents included museums (5% of all responses), performance venues/theaters (3%) and parks/historic sites (2%). Restaurants/bars/other food and alcohol respondents accounted for 5.5% of respondents and are included in the “other” category below.

What industry sector are you affiliated with? (If more than one applies, check the primary one.)
• Each of Minnesota’s five tourism regions was well-represented among April 28-30 survey respondents, with the metro represented by the most respondents (27% of the total).

In what Tourism Region are you located?
Additional notes about survey respondents:

- All 438 responded to a question asking if they were open and doing business a year ago, during the 30-day period leading up to the same date in 2019. 367 (84%) responded “yes” and 71 (16%) responded “no.” “No” respondents were not asked the questions about recent and projected business activity, compared with the same period a year earlier.

- 335 responded to the question about recent business, and 336 responded to the question about projected business.

- 356 responded to the question about how long it will be before they start to see an improvement in business activity, including five respondents who commented but did not check a response category.

- 266 responded to the question about what steps they are taking to safely welcome visitors, and 231 clarified how they are demonstrating and sharing these safety measures.

- 357 responded to the question about the operational status and planned re-opening of their business or organization.

- Between 305 and 315 responded to the ratings questions about programs and services Explore Minnesota currently provides or is considering.

- All 435 responded to the question about the industry sector they are affiliated with.

- 320 responded to the question about what region they are located in.
Thank you for participating in the fourth in a series of surveys for the Minnesota tourism industry. Please look for notice of our next survey in an upcoming edition of EMT Express.

Explore Minnesota’s team is here for you. As we navigate this difficult time together, we remain fully committed to providing fact-based information, support, encouragement and solutions for Minnesota’s tourism industry now and in the future. Please reach out to us at any time with your comments, concerns and suggestions. A good way to do this is to use the recently-created industry e-mail box for questions, suggestions, comments to:

Explore Minnesota: questions.exploreminnesota@state.mn.us
THANK YOU