Traveler Profile Study

Fall 2019 Seasonal Brief

February 2020

BACKGROUND & OBJECTIVES

- As the state's tourism promotion office, Explore Minnesota (EMT) pursues an entrepreneurial approach to generating visitation to the state, leveraging the state's tourism investment with increased involvement by the private sector. As such, it is imperative that EMT communicates the impacts of its efforts to key stakeholders, including residents, tourism businesses and organizations, and government.

- To that end, EMT has partnered with Strategic Marketing & Research Insights, LLC, (SMARInsights) to study travelers who visit the state for leisure, to help inform the organization's future marketing strategies and improve the effectiveness of its efforts to attract more visitors. EMT will use the data and analysis from this study to craft its media mix, timing, messaging, and content. Objectives of the Traveler Profile are to gather information from Minnesota visitors and potential visitors to better understand:

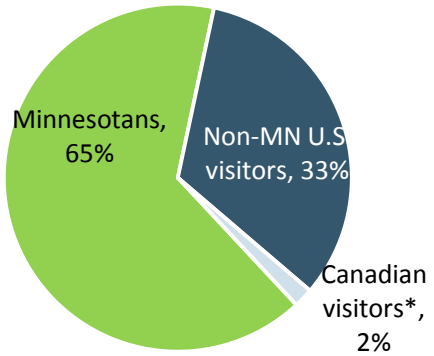
METHODOLOGY

- This seasonal brief represents the third of three waves of surveying. Seasonal briefs were prepared after data was collected for each of EMT's three defined seasons, with a final year-end narrative report compiling all the data.
- Respondents were screened to ensure that they were 21+ years of age, residents of the U.S. or the Canadian regions of western Ontario and southern Manitoba, and travel decision-makers for their household. Fall visitors were screened to ensure they had visited the state in September, October, and/or November 2019. Potential visitors were screened to ensure they had some level of familiarity with Minnesota and some degree of likelihood to visit in the next year.
- Surveys were completed with 607 fall visitors to the state, and 502 potential visitors were surveyed. The research asked visitors about multiple trips, and because many visit more than once in a season, the visit data presented here is from a total of 1,551 fall Minnesota trips, distributed as shown below.

* Due to the low number of fall survey responses from Canadian visitors, Canadian results are not provided in this report. Instead, fall research oversampled Canadian visitors to Minnesota from throughout 2019. Those results will be summarized in the full-year report that is being produced subsequent to this fall report.

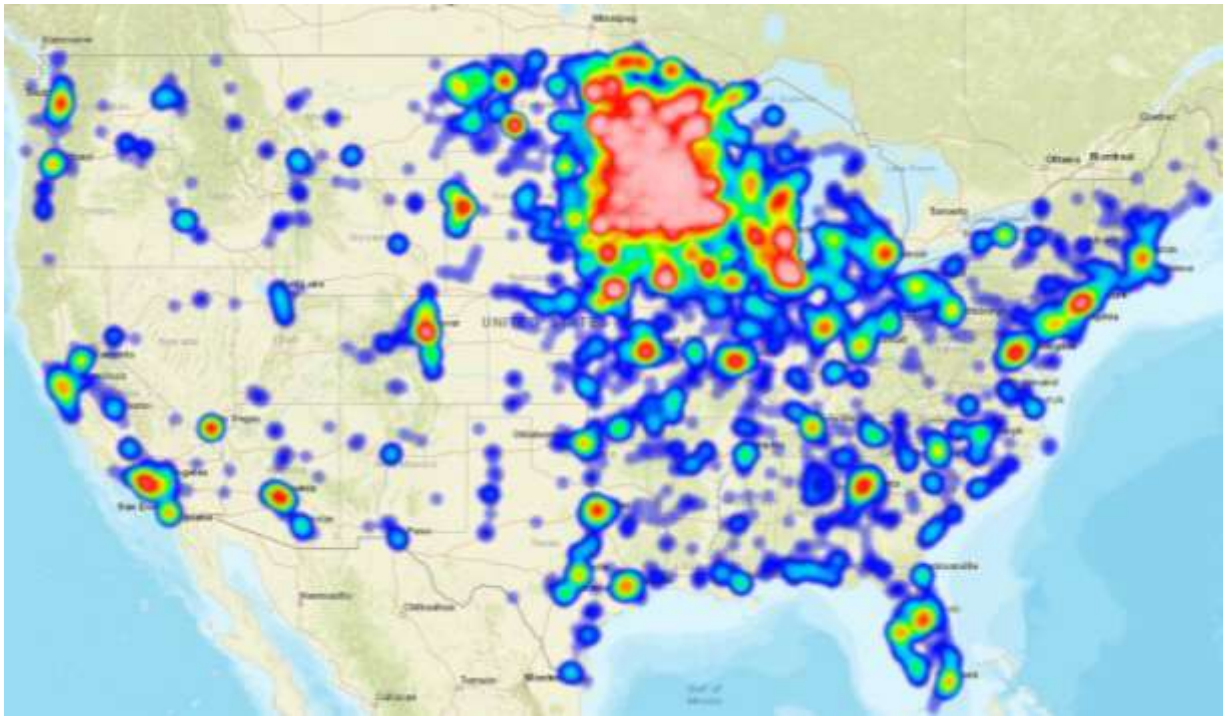
Surveys	Fall 2019 visitors	Avg. # Fall trips
Minnesotans	298	3.3
Non-MN U.S. visitors	287	1.9
Canadian visitors*	22	1.2
Total visitor surveys	**607**	**2.6**
Potential visitors	502	

Fall Trip Distribution



WHERE DID FALL VISITORS COME FROM?

- SMARInsights subcontracted with mobile location data firm UberMedia to help identify Minnesota visitor source markets. The heat map below illustrates the origin markets of 4.6M unique devices in fall 2019. We used this as a guide for sampling to find fall visitors.



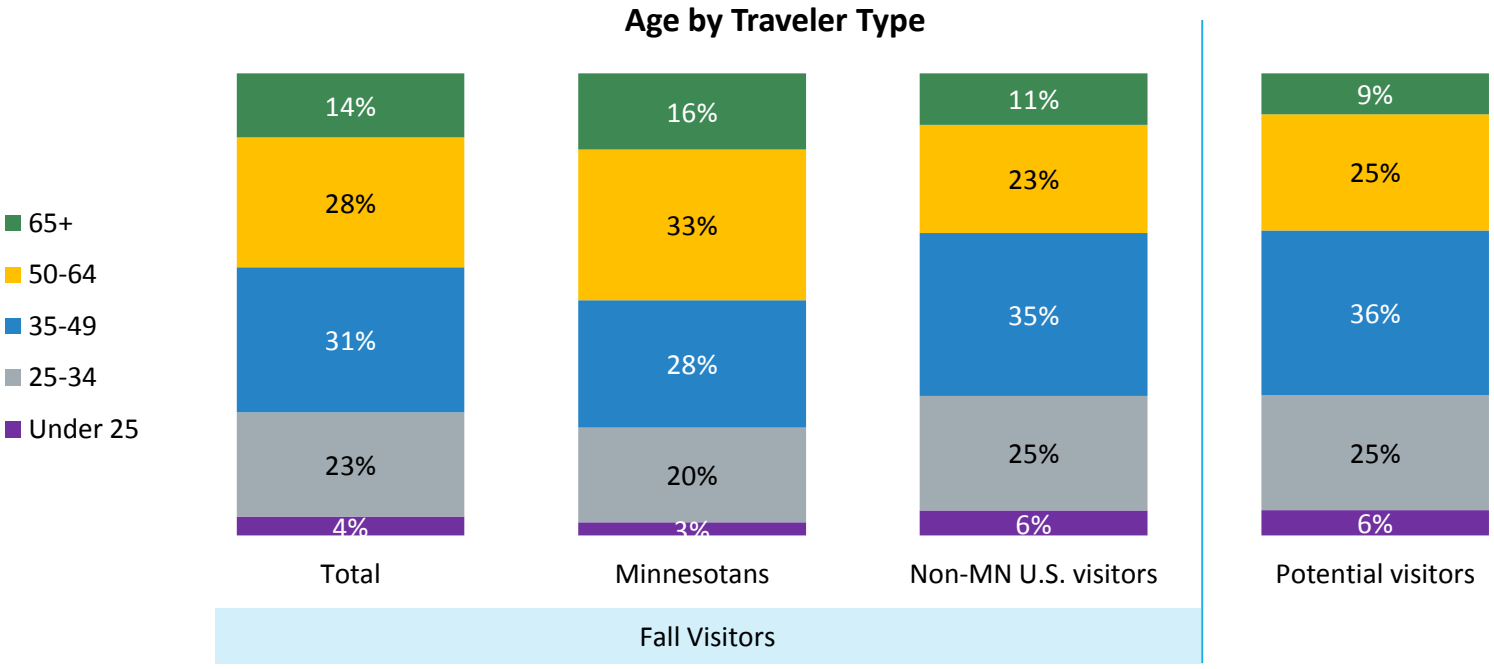
MN visitation as share of total	
MN	73%
Share of out-of-state visitors	
WI	5%
IA	3%
ND	2%
SD	2%
TX	1%
NE	1%
CA	1%
FL	1%
MO	1%
MI	1%
IN	1%
CO	1%
CAN	0.24%

Visitors by DMA	
In-state	
Minneapolis-St. Paul, MN	85%
Duluth, MN-Superior, WI	7%
Rochester, MN Mason City, IA Austin, MN	5%
Mankato, MN	3%
Non-MN U.S.	
Fargo-Valley City, ND	17%
Sioux Falls (Mitchell), SD	8%
La Crosse-Eau Claire, WI	6%
Chicago, IL	5%
Des Moines-Ames, IA	3%
Minot-Bismarck-Dickinson (Williston), ND	3%
Milwaukee, WI	3%
Sioux City, IA	2%
Omaha, NE	2%
Cedar Rapids-Waterloo-Iowa City & Dubuque, IA	2%
Denver, CO	2%
Madison, WI	2%
New York, NY	2%
Green Bay-Appleton, WI	2%

Figures shown in DMA table are source markets with 2% and above.

DEMOGRAPHIC PROFILE OF FALL VISITORS

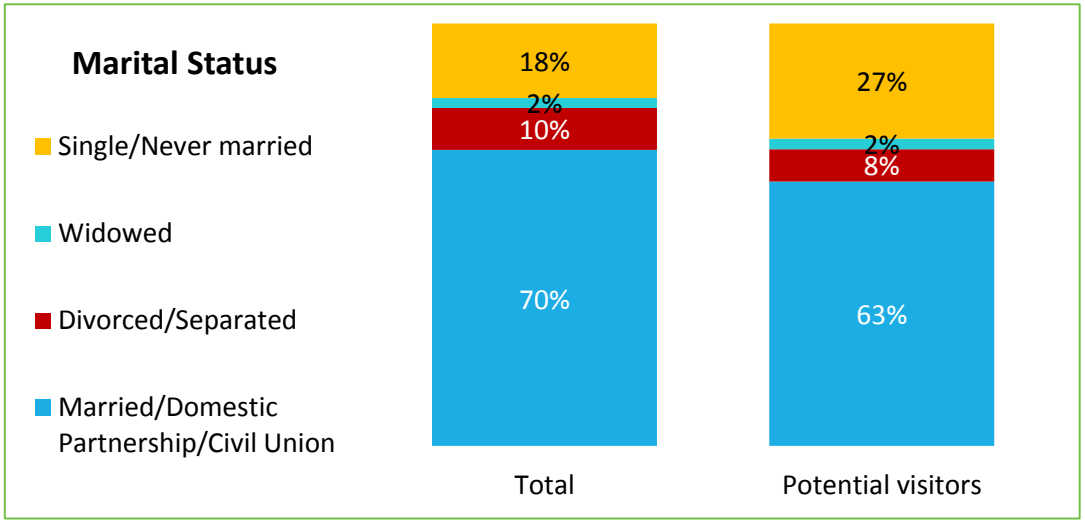
- Out-of-state visitors skew younger than in-state visitors. In terms of age, potential visitors look more like out-of-state than in-state visitors.

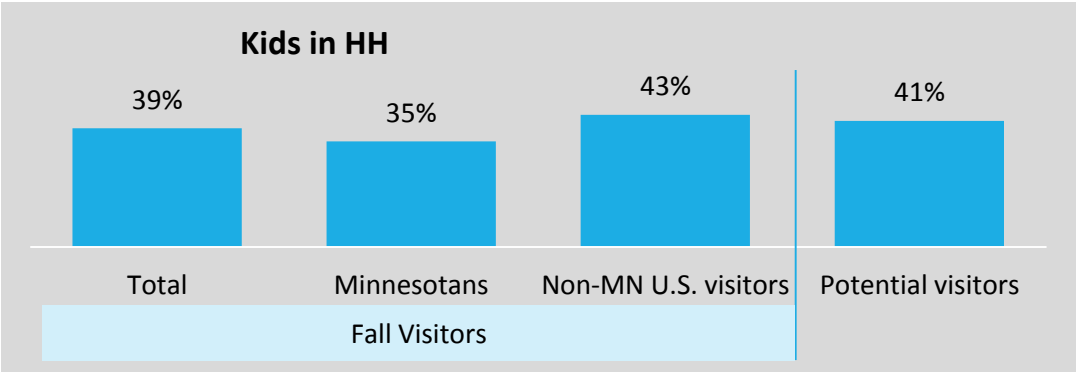


Age of survey respondents, who are travel decision-makers for their households.

DEMOGRAPHIC PROFILE OF FALL VISITORS

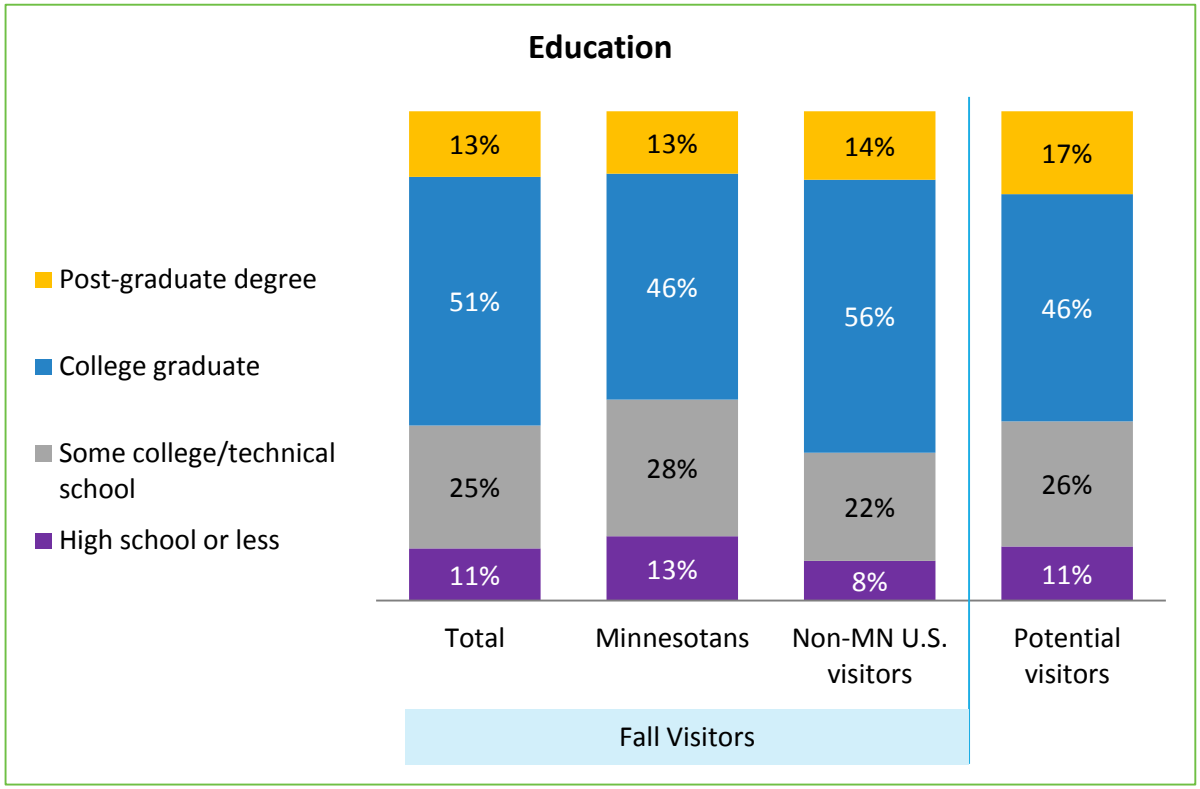
- Compared to potential visitors, visitors are more likely to be married and less likely to have kids at home, which is consistent with an older population.





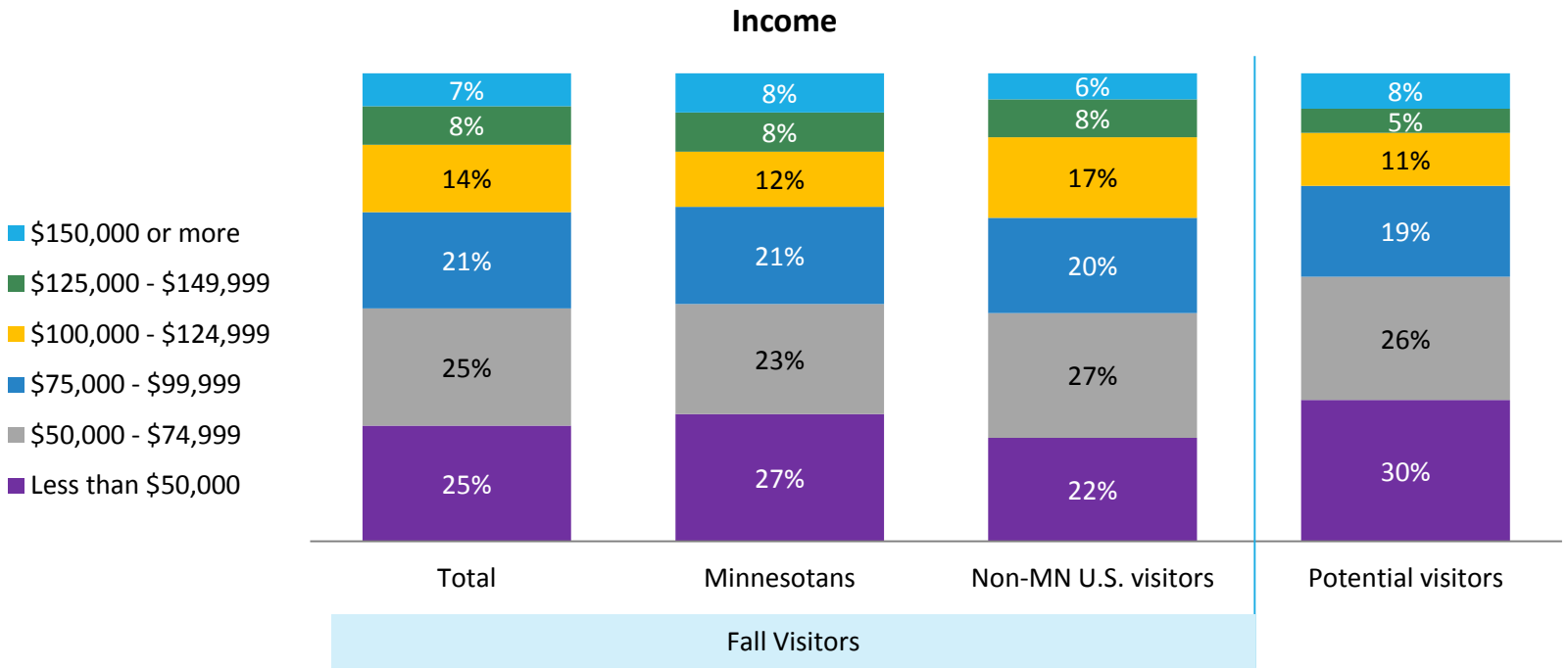
DEMOGRAPHIC PROFILE OF FALL VISITORS

- Fall visitors from out of state are more likely to have college degrees than in-state and potential visitors.



DEMOGRAPHIC PROFILE OF FALL VISITORS

- There is little variation across geographies in terms of income.



DEMOGRAPHIC PROFILE OF FALL VISITORS

- Potential visitors are more ethnically diverse than visitors, as we have seen in other seasons as well.

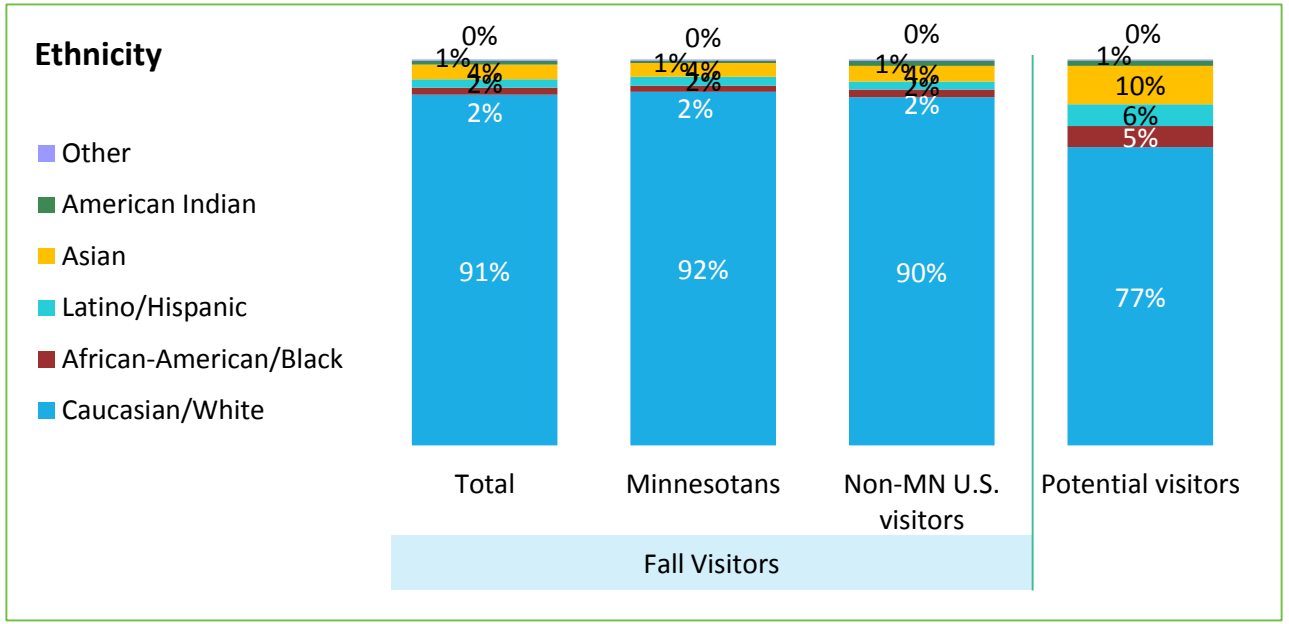


IMAGE RATINGS

- Fall visitors rate Minnesota highest for its parks, trails and outdoor activities.
- Ratings among potential visitors are somewhat lower, which makes sense given lower familiarity.
- Gaps between the two groups represent opportunities to help educate potential visitors. The largest gap is on the state being a welcoming place, which we have seen year-round, and on being a place for families with kids.

How much do you agree that these statements describe Minnesota?	Fall Visitor	Potential Visitor	Diff.
Is a place I feel welcome	4.5	4.0	0.5
Has great options for families with children	4.5	4.0	0.5
Has great parks and trails	4.6	4.1	0.5
Has exciting spectator sporting events	4.2	3.7	0.4
Offers plenty to see and do	4.5	4.1	0.4
Has charming small towns	4.4	4.0	0.4
Has four amazing seasons	4.4	4.0	0.4
Has exciting urban entertainment	4.1	3.7	0.4
Is a fun and exciting place to visit	4.3	4.0	0.4
Has great opportunities for adult vacations	4.3	3.9	0.4
Has fascinating culture and heritage	4.1	3.7	0.4
Has first-rate fishing/hunting	4.5	4.1	0.3
Offers a relaxing atmosphere	4.4	4.1	0.3
Has great outdoor activities	4.6	4.2	0.3
Offers a good vacation value for the money	4.3	4.0	0.3
Has vibrant cities	4.2	3.9	0.3
Is a place for adventure	4.3	4.0	0.3
Has stunning scenery	4.5	4.2	0.3

(Mean score on 5-pt scale where 1=does not describe at all, 5=describes extremely well)

IMAGE RATINGS

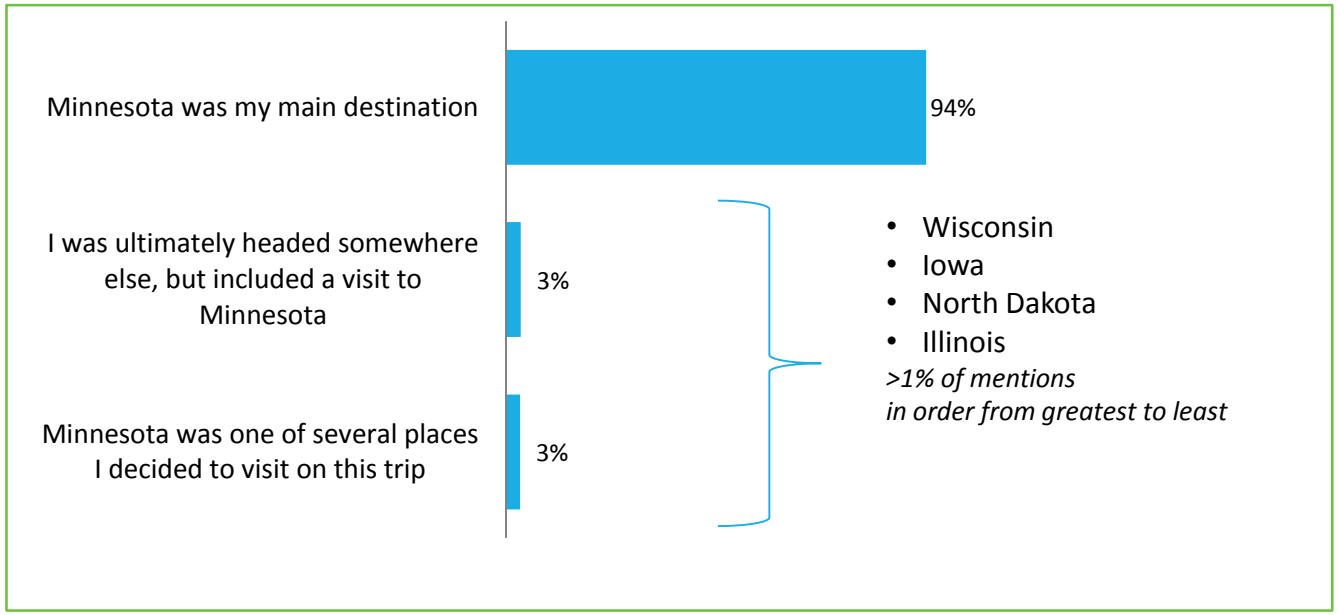
- In addition to the image attributes, the attributes shown here are economic indicators, and while messaging aimed at influencing these attributes is not explicit in EMT's marketing, they do provide an indicator of the halo effect of advertising on consumers' views of the state.
- Fall visitors are positive about Minnesota as a place to live and work, while potential visitor ratings are just above neutral. Neutrality is a function of unfamiliarity.

How much do you agree that these statements describe Minnesota?	Fall Visitor	Potential Visitor	Diff.
Great place to live	4.2	3.6	0.6
Great place to work	4.1	3.6	0.5

(Mean score on 5-pt scale where 1=does not describe at all, 5=describes extremely well)

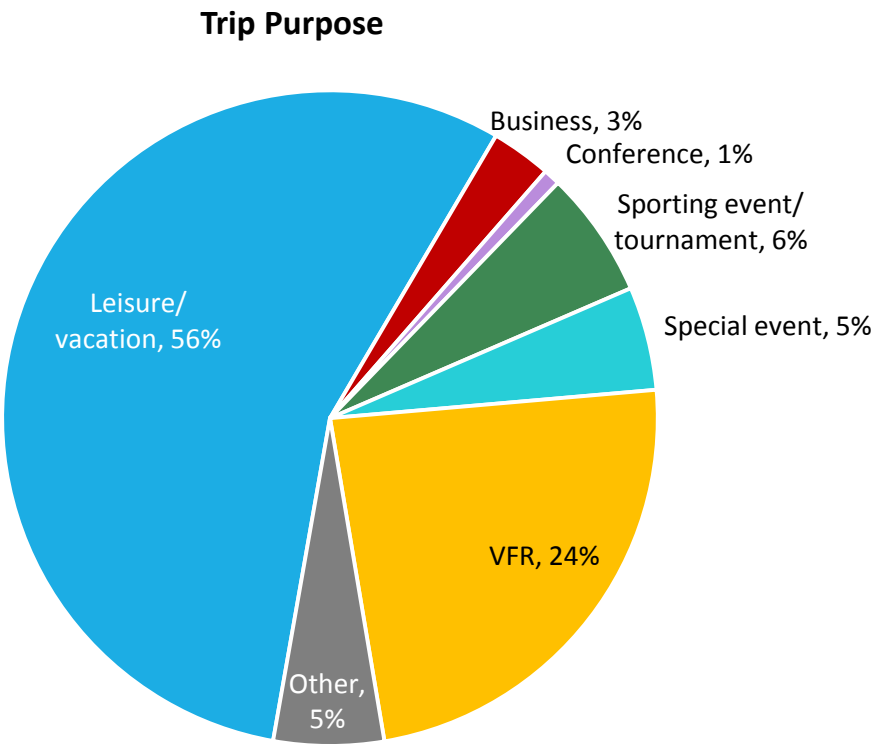
PURPOSE OF TRIP

- Minnesota was the main destination for 9 in 10 fall visits.
- Just 6% of these trips are to other places where Minnesota is part of a longer trip or is a stop along the way.



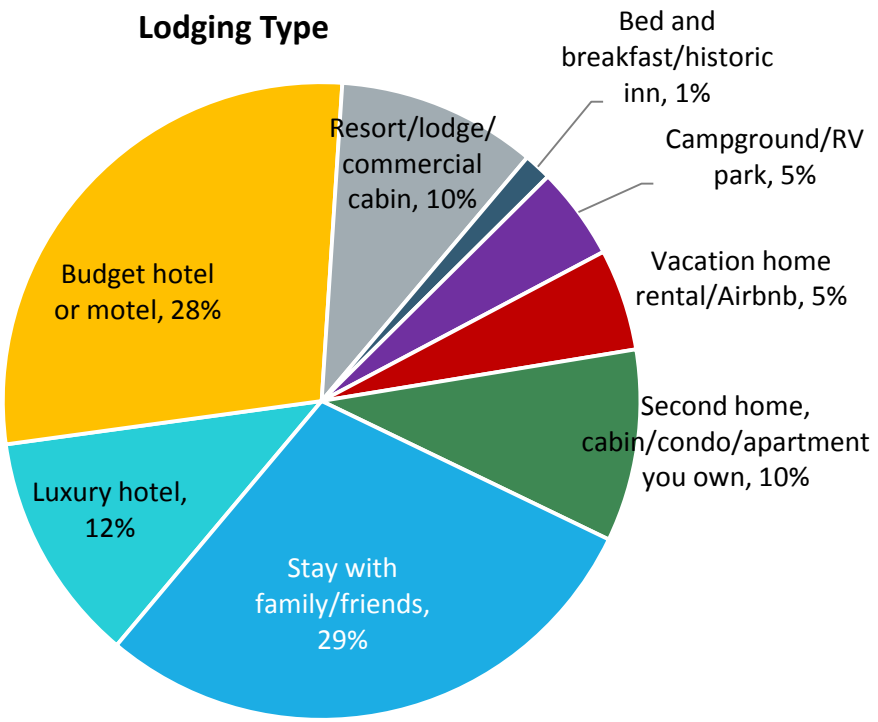
PURPOSE OF TRIP

- More than half of fall visits are for leisure, and a quarter are to visit friends and relatives.



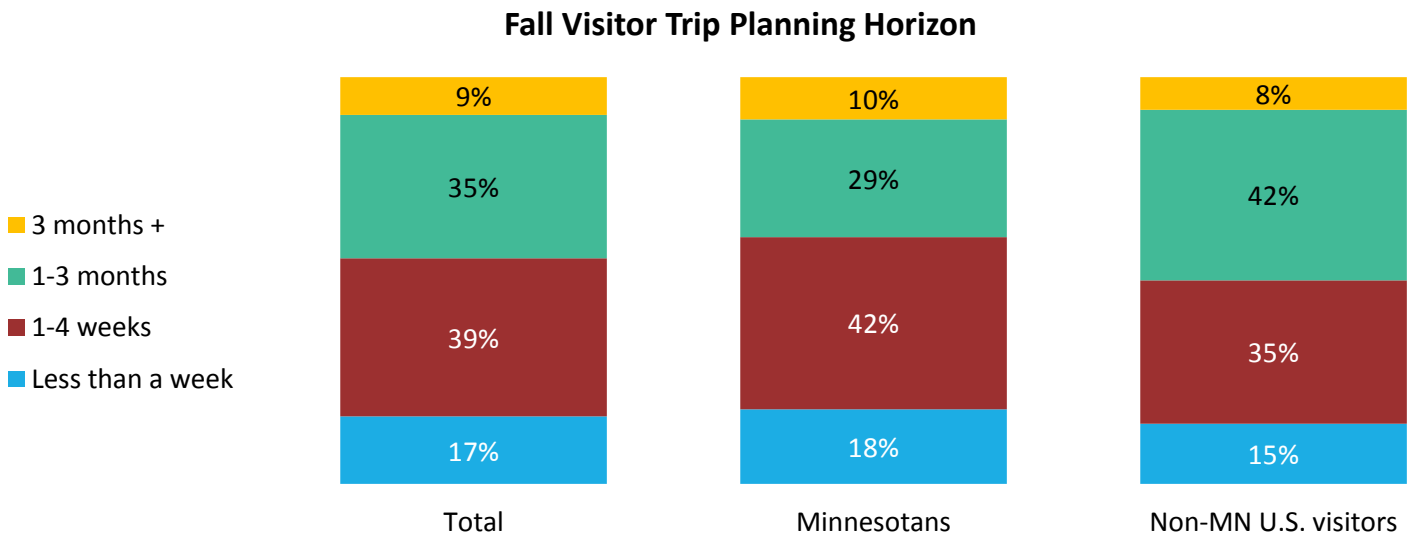
TRIP SPECIFICS

- Just over a quarter of overnight fall trips used a budget hotel/motel, with a similar share staying with friends and family.
- Homeshare/Airbnb remains low at 5%.



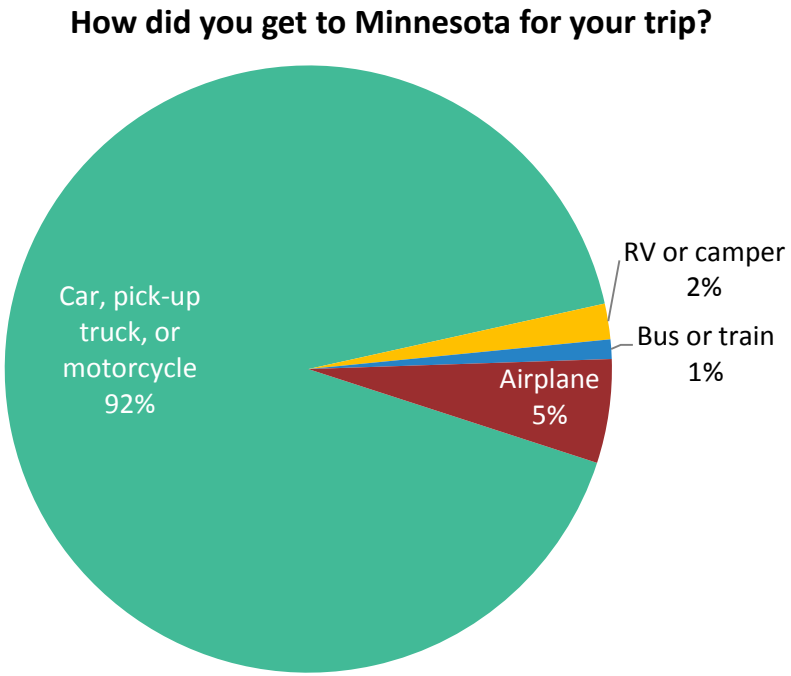
TRIP PLANNING

- Fall trips have a shorter planning horizon than spring-summer trips, with fewer than 10% of trips planned 3 months or more in advance.



MODE OF TRANSPORTATION

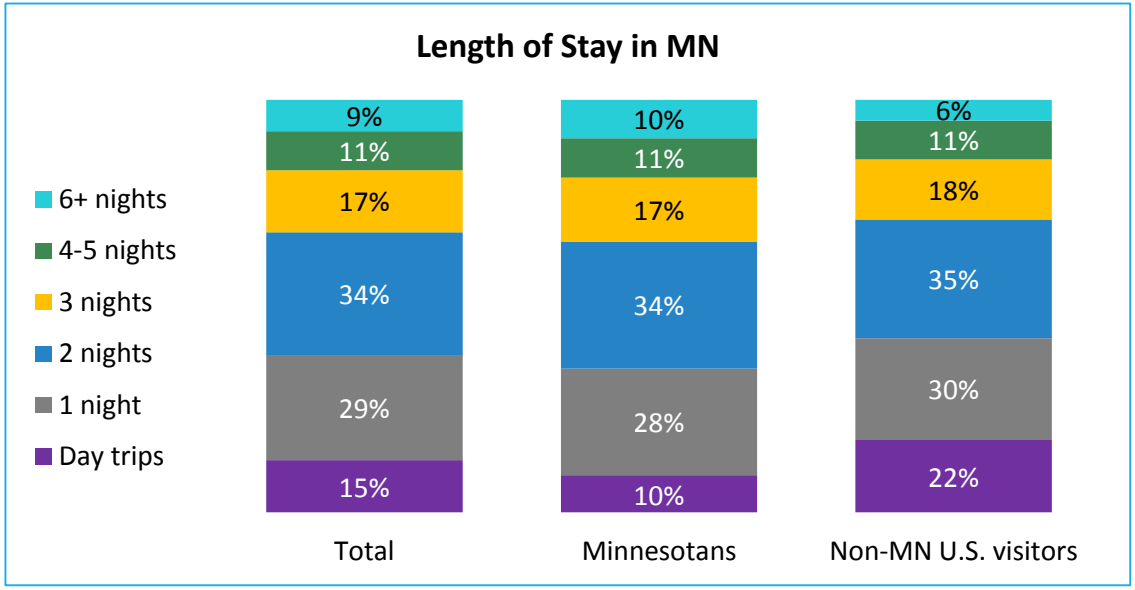
- Fall trips are mainly drive trips, with visitors using personal vehicles. As we saw in spring-summer, just 5% involve air travel.



TRIP SPECIFICS

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

- On average, fall overnight trips are 3.0 nights long, a little shorter than spring-summer trips (3.2 nights) and longer on average than winter trips (2.7 nights).

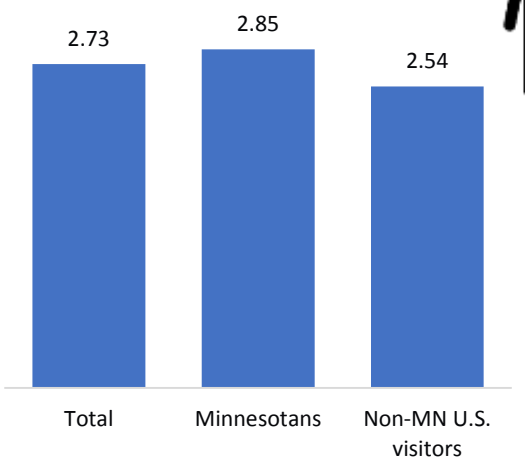


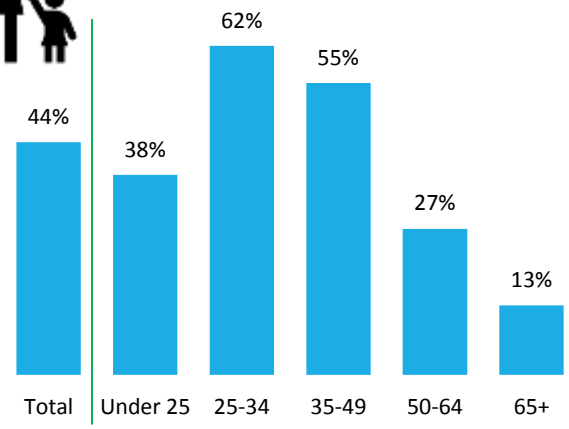
Overnight trips	Nights in MN	Nights on trip
Total	2.7	3.1
Minnesotans	2.8	3.2
Non-MN U.S.	2.5	3.1

TRIP SPECIFICS

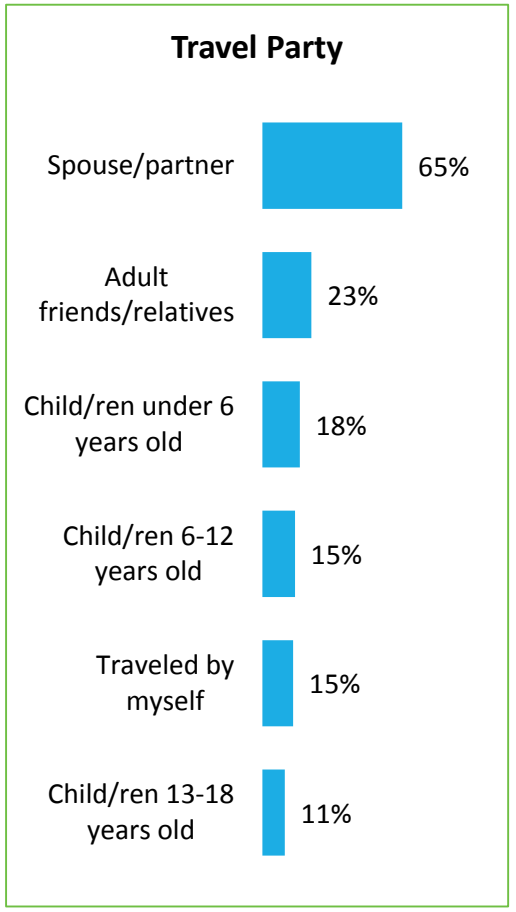
Trip specifics data is of trips, not visitors. Many visitors make multiple trips of multiple lengths over the course of the season.

- Two-thirds of travel parties include a spouse; 44% of fall travel parties include children.
- Travel party size is fairly consistent by geography.





Age of survey respondents, who are travel decision-makers for their households.



TRIP SPECIFICS

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

- Shopping and dining – activities common to many leisure trips – have the highest participation on fall Minnesota trips. More than a third of fall trips include viewing fall colors.

Dining at unique locally owned restaurants (non-chain)	53%
Shopping	50%
Friends or relatives	45%
Scenic drives	40%
Sightseeing	39%
Viewing fall colors	39%
Nature walks	38%
Mall of America	28%
Fairs/festivals/events	25%
State/national parks	25%
Driving on designated scenic byways	23%
Hiking/backpacking	22%
Wineries/breweries/distilleries	18%
Historical attractions	17%
Wildlife/bird watching	17%
Nightlife, concerts and entertainment	15%
Arts and cultural activities	15%
Casinos	14%
Swimming	14%

Museums and galleries	13%
Fishing	12%
Health and wellness activities	11%
Camping	10%
Zoos	10%
Professional sporting events	10%
Amusement parks/carnivals	8%
Amateur sporting events/tournaments	7%
Paddling – canoeing, kayaking, paddleboard, etc.	7%
Parades and cultural events	7%
Paved trail/road biking	7%
Water parks	6%
Theater performances	5%
Hunting	5%
Motor boating/water skiing/jet skiing	5%
Off-roading/ATV driving	4%
Golfing	3%
Mountain biking/fat biking	2%
Motorcycling	1%

TRIP SPECIFICS

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

- Respondents were asked to identify up to five of the listed attractions and activities that motivated them to choose Minnesota as the destination for their fall trip.
- As in spring-summer, the top trip motivators are friends/relatives and Mall of America.
- Fall colors influenced nearly 1 in 5 fall visitors to take a Minnesota leisure trip.

Top 10 Fall Trip Motivators	
Friends or relatives	35%
Mall of America	18%
Viewing fall colors	17%
Shopping	16%
Scenic drives	15%
Nature walks	13%
Dining at unique locally owned restaurants (non-chain)	12%
State/national parks	11%
Sightseeing	11%
Hiking/backpacking	8%

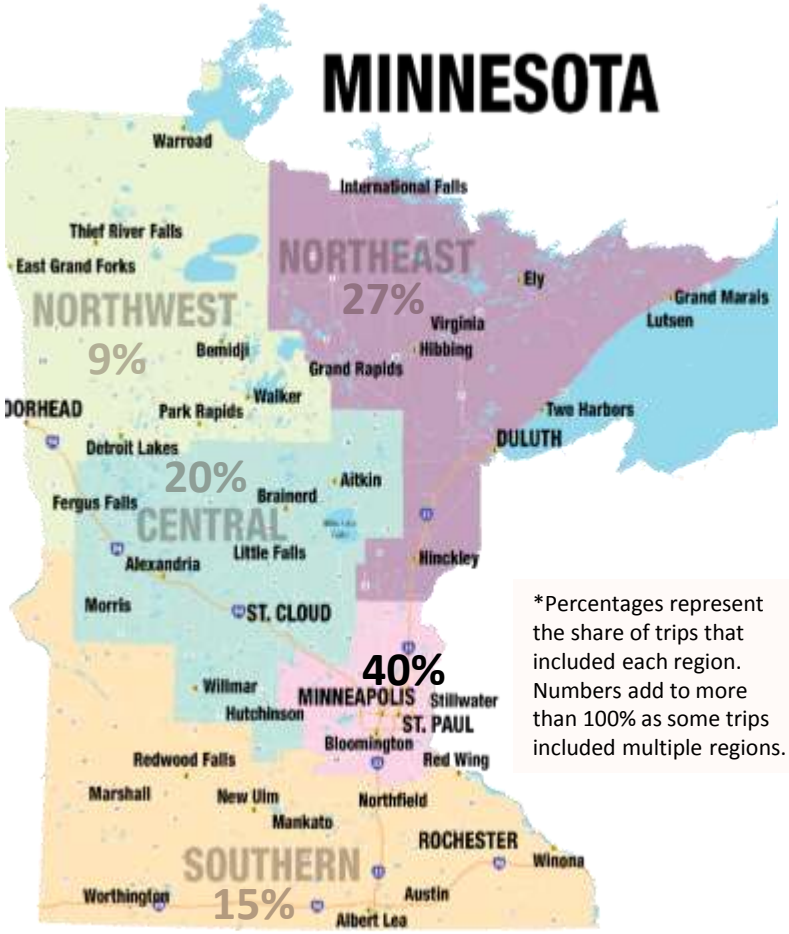
TRIP SPECIFICS

- Fall trips resemble other seasonal trips in that the highest share are to the MSP Metro area, followed by Northeast, Central, Southern, and Northwest regions.

Age of visitors, within each region	Northwest	Northeast	MSP Metro	Central	Southern
Under 25	11%	17%	20%	9%	37%
25-34	26%	20%	25%	16%	20%
35-49	23%	21%	19%	22%	15%
50-64	21%	19%	18%	30%	14%
65+	18%	23%	17%	24%	13%

Age of survey respondents, who are travel decision-makers for their households.

*Market of origin of trips to MN regions	Northwest	Northeast	MSP Metro	Central	Southern
Non-MN U.S.	10%	15%	58%	9%	17%
Minnesotans	9%	36%	27%	27%	13%
Total U.S.	**9%**	**27%**	**40%**	**20%**	**15%**



*Percentages represent the share of trips that included each region. Numbers add to more than 100% as some trips included multiple regions.

TRIP SPENDING

- Average fall trip spending is $535 per travel party.
- Overnight trips using paid lodging have higher spending overall.
- Day trip spending is low and focused mainly on food/drink, sporting events, and general shopping.
- Most trips whose main purpose is to visit friends and relatives also use friends/relatives as lodging. But some VFR trips do use paid lodging.

Fall trip spending	Total	Overnight, paid lodging	Day trip	Visit friends and relatives
Lodging and camping accommodations	$175	$282	$0	$13
Food and beverage	$118	$147	$35	$92
Arts & culture	$17	$22	$4	$10
Recreational fees, rentals, equipment, etc.	$14	$15	$7	$13
Sporting events	$22	$26	$25	$12
Other events, entertainment, attractions	$31	$38	$10	$24
Shopping – tourist	$38	$50	$8	$25
Shopping – general	$43	$48	$21	$40
Transportation within Minnesota	$44	$51	$17	$43
Other	$32	$47	$0	$9
Total	**$535**	**$727**	**$127**	**$282**

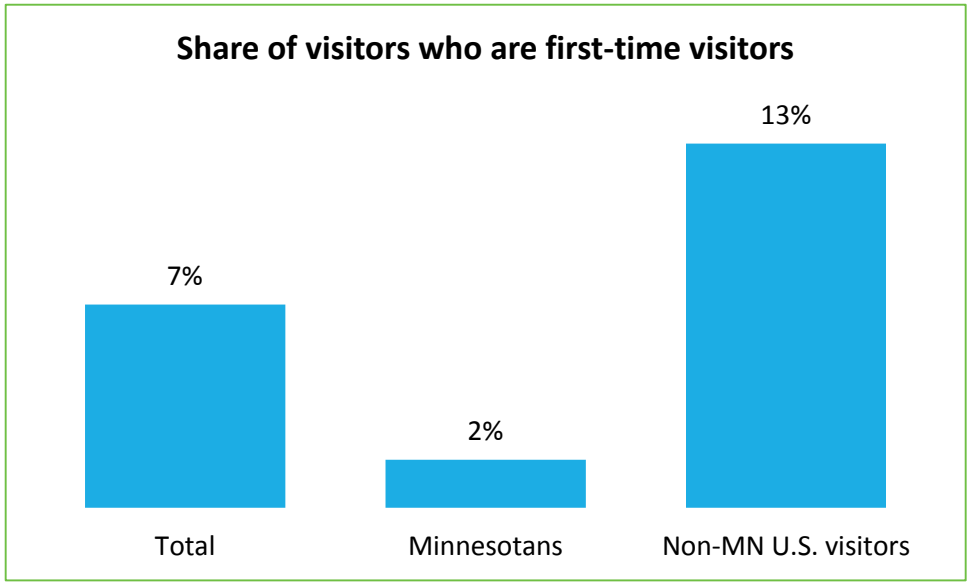
TRIP SPECIFICS

- Factoring in travel party size and length of stay, fall visits bring in an average of $73 per person per day.
- Fall visitors who use paid lodging spend more than the average.

Spending per person per day	TOTAL	Overnight, paid lodging	Day trip	Visit friends and relatives
Total spending	$535	$727	$127	$282
Travel party	2.7	2.9	2.1	2.6
Length of stay (nights)	2.7	3.1	0.0	3.3
Spending per person/day	**$73**	**$82**	**$61**	**$33**

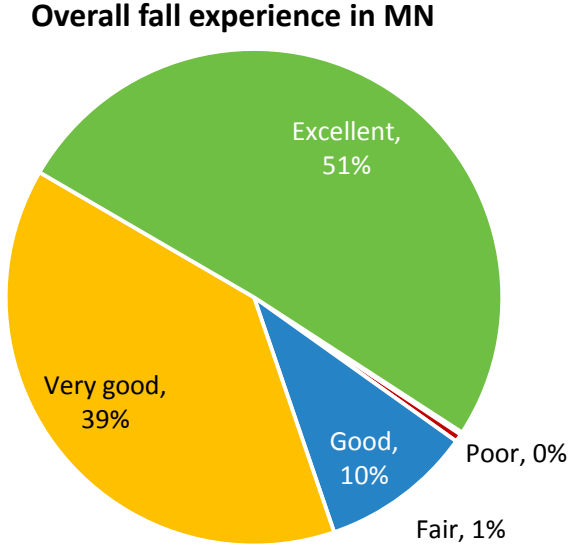
FIRST-TIME VS. REPEAT VISITORS

- Overall, fewer than 10% of fall visitors are first-time Minnesota visitors.



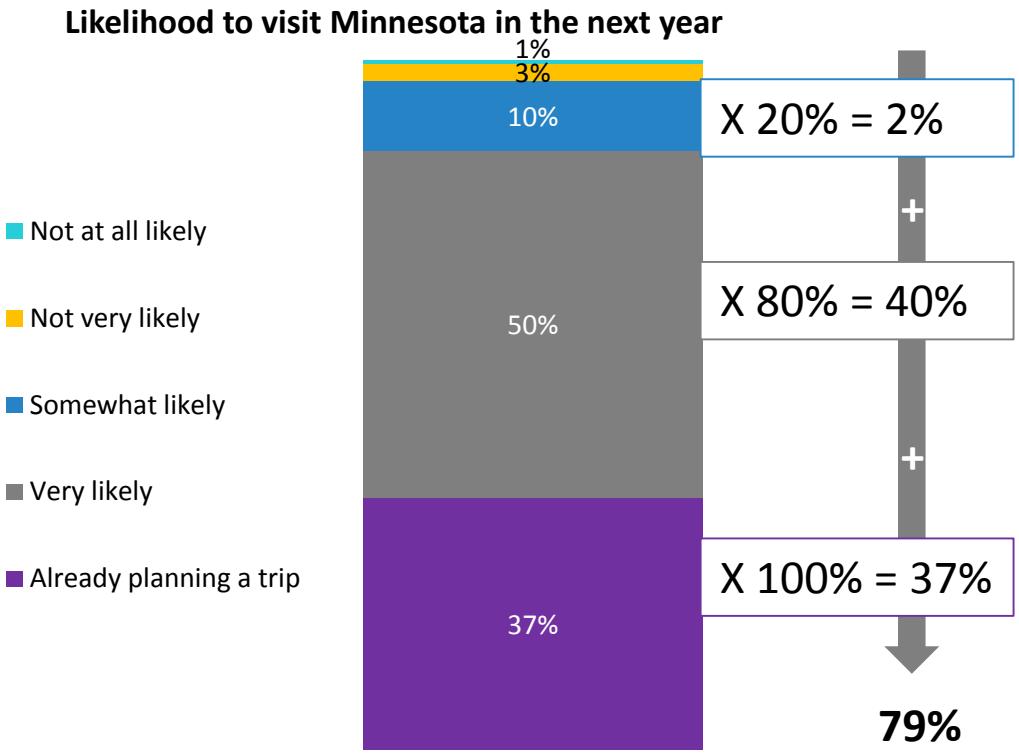
VISITOR SATISFACTION

- Fall trip satisfaction is very high, with more than half of visitors rating their trips very good or excellent. Compared to spring-summer, more fall visitors said their Minnesota trip was excellent.
- In general, repeat visitors and those who use paid lodging are more positive about their trips.



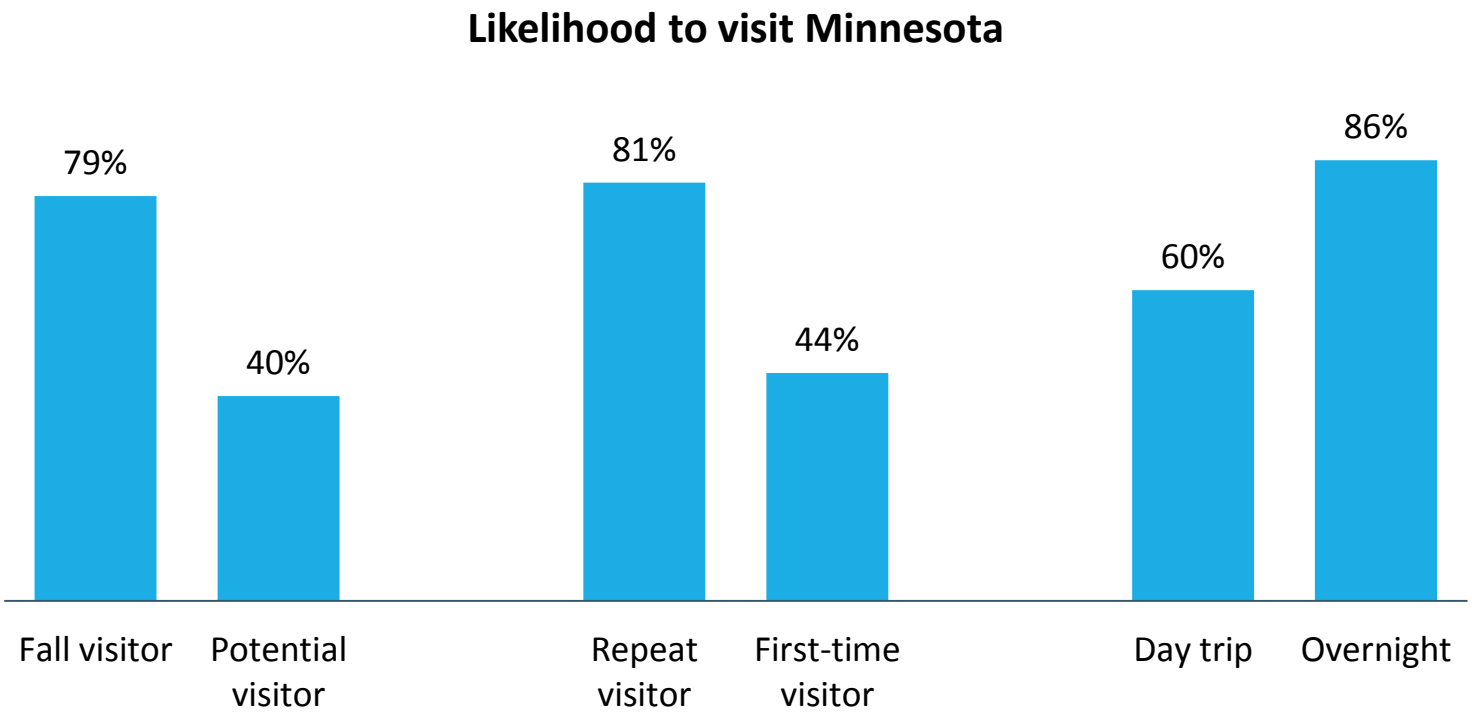
VISIT INTENT

- Visit intent among fall visitors is 79%.
- SMARInsights uses a calculation for visit intent that uses 100% of those already planning a trip, 80% of those very likely to visit, and 20% of those somewhat likely to visit. This formula allows us to express future visit intent in a single number.



VISIT INTENT

- Visit intent is highest among fall overnight and repeat visitors.



APPENDIX

insights
Strategic Marketing and Research

UBERMEDIA

- UberMedia is a mobile data analytics company providing location-based behavioral information and analytical insights. The company's capabilities are in the collection, preparation and dissemination of mobile consumer data focused on location and behavioral information. UberMedia develops solutions for mobile advertising, location measurement, and business intelligence.

- While the numbers fluctuate on a monthly basis, and UberMedia is always adding mobile devices to its database, on average, the company accesses location-based data from approximately 300 million devices in America and 1 billion outside of America, for a total of approximately 1.3 billion total unique devices every month. UberMedia pulls location-based data from more than 150,000 different apps every month. These apps consist of a very broad spectrum of apps in order to engage a wide array of nationalities, demographics, and audience profiles, including The Weather Channel, TextNow, DraftKings, MeetMe, CBS Sports, TuneIn Radio, Paint by Numbers, Skout, theCHIVE, Jigsaw Collection HD, Tagged, TheScore, TV Guide, Twitter, Trebel Music, UNICORN – Color by Number Game, Solitaire One, Spades. UberMedia has stored location-based data on its servers since 2015, allowing a look-back to that period.

Accuracy and Limitations of Mobile Location Data

- UberMedia strives to pull from 2%-10% of all devices entering a geofenced area. Statistically speaking, UberMedia's data aims to be at 99% confidence with a 1% margin of error. Mobile data is not tracking someone 100% of the time. Locations are only given off when someone is connected to data, whether it be cellular or Wi-Fi. Some tourists, especially international visitors, often leave their phones on airplane mode, which make it impossible to track during those times. UberMedia believes in full transparency and always provides a mobile device count along with reporting, should any partner wish to see how many devices we have access to in a geofenced area.

QUESTIONNAIRE

Explore Minnesota Tourism
Fall Traveler Profile

COMPETITIVE SET	
Minnesota	Manitoba/Western Ontario
Wisconsin	Colorado
Illinois	Michigan
South Dakota	Missouri

Screeners

zip. What is your postal code? _____

Decisionmaker. Who in your household is primarily responsible for making decisions concerning travel destinations?

- ☐ Me
- ☐ My spouse [TERMINATE AFTER SCREENERS]
- ☐ Jointly with my spouse
- ☐ Someone else [TERMINATE AFTER SCREENERS]

screenergrid. Please indicate if each of the following applies to you.

[ROTATE]	YES	NO
I regularly use social media like Facebook, Twitter, or Instagram		
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home	[TRAVEL SCREENER; TERMINATE IF NO]	
I regularly engage in some form of physical exercise like walking, biking or participating in sports to stay healthy		
I use video streaming services like Hulu, Netflix, or Amazon		

age. What is your age? [TERMINATE AT END OF SCREENERS IF UNDER 21]

Competitive landscape

S1. How familiar are you with the following places as leisure destinations? [DO NOT RATE HOME STATE-EXCEPT MN and MANITOBA]

[INSERT COMPETITIVE SET]	Not at all familiar	Somewhat familiar	Very familiar

S2. Which of these places have you visited for a leisure trip that involved an overnight stay or was at least 50 miles from home?

[INSERT COMPETITIVE SET]	Visited in the last couple of years - 1	Visited three years ago or more - 2	Never visited - 3

S3. In the next year, how likely are you to visit the following places for a leisure trip that involves an overnight stay or is at least 50 miles from home?

[INSERT COMPETITIVE SET]	Not at all likely - 1	Not very likely - 2	Somewhat likely - 3	Very likely - 4	Already planning a trip - 5

[IF S2_1>1 AND S3_1<3 TERMINATE]

[IF S2_1>1 AND S3_1>2 = POTENTIAL VISITOR]

END OF SCREENERS

Next we have some questions for you about one of these destinations, selected at random. We'd like you to focus your attention on: **Minnesota**.

QA. First, in just a few words, what would you say makes **Minnesota** unique and different from other places for a leisure trip? _____

QB. What two words would you say best describe the personality of **Minnesota**?

_____ _____

Image & Trip planning

QX. How much do you agree that each of these statements describes...? [HAVE THEM RATE MINNESOTA AND ONE OTHER PLACE WITH SIMILAR FAMILIARITY AS MINNESOTA; DO NOT RATE HOME STATE/PROVINCE-EXCEPT MINNESOTA AND MANITOBA]

[ROTATE]	Does not describe at all – 1	2	3	4	Describes extremely well – 5
Offers a relaxing atmosphere					
Has great opportunities for adult vacations					
Has stunning scenery					
Has great options for families with children					
Has great parks and trails					
Has exciting spectator sporting events					
Has great outdoor activities					
Has first-rate fishing/hunting					
Offers plenty to see and do					
Has four amazing seasons					
Has charming small towns					
Has fascinating culture and heritage					
Has vibrant cities					
Has exciting urban entertainment					
Is a place I feel welcome					
Offers a good vacation value for the money					
Great place to live					
Great place to work					
Is a fun and exciting place to visit					
Is a place for adventure					

QUESTIONNAIRE

Q1. Next we'd like to ask you about your general travel preferences. When planning your leisure travel, which of the following resources do you typically use? [ROTATE]

Advertisements (television, online, magazine, etc.)
Family or friends
Guide books like Frommer's or Lonely Planet
Magazine and newspaper articles
Social media (Facebook, Instagram, etc.)
Tourism websites for destinations you are visiting
Travel advice websites or apps (Expedia, AAA, etc.)
Travel agent
Travel/visitor guides
Traveler review sites or apps (Yelp, TripAdvisor, etc.)
Other, specify _____
None of these

[POTENTIAL VISITORS SKIP TO Q21]

Trip specifics

Q2. You mentioned that you've [OUT OF STATE visited Minnesota/IN STATE traveled within Minnesota] for leisure recently. How many times since the beginning of 2018 have you [visited/traveled to] Minnesota for leisure? _____

[NOTE TO PROGRAMMER: IN-STATE TRAVELERS NEED TO GET WORDING ABOUT IN-STATE AND OUT-OF-STATE GETS DIFFERENT WORDING]

Q3. What month(s) did you [OUT OF STATE visit /IN STATE travel within] Minnesota for leisure? *Select all that apply.*

2018	2019
January	January
February	February
March	March
April	April
May	May
June	June
July	July
August	August
September	September
October	October
November	November
December	December

Winter trip = December – March
Spring/Summer trip = April – August
Fall trip = September – November

[FALL 2019 VISITOR = VISITED SEPT-NOV 2019; IF NOT A FALL 2019 VISITOR, TERMINATE]

FOR CANADIAN VISITORS, KEEP ALL 2019 VISITORS AND ASK ABOUT AT LEAST ONE TRIP PER SEASON WHERE MULTIPLE SEASONAL VISITS.

Q3A. How many trips did you take to Minnesota during the months of September through November of 2019? _____

You mentioned that you've taken [NUMBER OF FALL 2019 TRIPS FROM Q3] fall Minnesota trip(s) this year. Please tell us a little more about your fall trips to/within Minnesota.

	Q4. How many nights did you stay in Minnesota/away from home?	Q5. How many nights in total were you away from home?
[TRIP DATE 1]		
[TRIP DATE 2]		
[TRIP DATE 3]		

	Q6a. Including you, how many people were in your travel party?	Q6b. How many people in your travel party were children under the age of 18?
[TRIP DATE 1]		
[TRIP DATE 2]		
[TRIP DATE 3]		

	Q7. [ASK IF Q6a>1] Who traveled with you on this trip? *Select all that apply.*
	Spouse/partner Adult friends/relatives Child/ren under 6 years old Child/ren 6-12 years old Child/ren 13-18 years old Other Traveled by myself
[TRIP DATE 1]	
[TRIP DATE 2]	
[TRIP DATE 3]	

	Q9. What was the main type of lodging you used while in Minnesota on this trip? *If you used multiple lodging types on this trip, your main lodging would be where you spent the most nights.* [DO NOT ALLOW MULTIPLES]
	Luxury hotel Budget hotel or motel Resort/lodge/commercial cabin Bed and breakfast/historic inn Campground/RV park Vacation home rental/Airbnb Second home, cabin/condo/apartment you own Stay with family and/or friends Did not stay overnight
[TRIP DATE 1]	
[TRIP DATE 2]	
[TRIP DATE 3]	

QUESTIONNAIRE

	Q10. To better understand the economic impact of tourism, what was the approximate amount of money your travel party spent on your [MONTH YEAR] trip while in Minnesota? *Please complete all fields. If there were no expenditures in a category, enter "0".*
	Lodging and camping accommodations _____
	Food and beverages, including groceries _____
	Arts & culture such as museums, historic sites, etc. _____
	Recreational fees, rentals, equipment, etc. _____
	Sporting events _____
	Other events, entertainment and attractions _____
	Shopping – tourist (gifts, souvenirs, antiques, arts and crafts) _____
	Shopping – general (clothing, personal or household items) _____
	Transportation to Minnesota _____
	Transportation within Minnesota (car rental, car sharing, fuel, etc.) _____
	Other (please specify _____) _____
[TRIP DATE 1]	
[TRIP DATE 2]	
[TRIP DATE 3]	

Q17. [SHOW MN MAP WITH REGIONS MARKED + CLICKABLE] Which of these Minnesota regions did you visit on this trip?	
1 - Northwest 2 - Northeast 3 – Minneapolis/ St. Paul area 4 - Central 5 - Southern	
[TRIP DATE 1]	
[TRIP DATE 2]	
[TRIP DATE 3]	

Now we're going to ask some questions specifically about your [MONTH/YEAR OF RANDOM FALL TRIP] trip to/within Minnesota.

Q12. How far ahead of your [RANDOM TRIP] trip did you choose your Minnesota destination as the place you would visit?

- Less than a week
- One to two weeks
- Three to four weeks
- One to three months
- Three to six months
- More than six months

Q13. Was this trip to/within Minnesota primarily for… ?

- Leisure/vacation
- Business/work
- Conference/convention
- Sporting event/tournament
- Wedding or other special event
- Visiting friends/relatives
- Other, specify _____

Q14. Which of the following best describes this [RANDOM TRIP] trip to Minnesota?

- Minnesota was my main destination
- I was ultimately headed somewhere else, but included a visit to Minnesota
- Minnesota was one of several places I decided to visit on this trip

Q15. [ASK IF Q14 > 1] Where else did you visit on this trip? _____

Q16. How did you get to Minnesota for your [RANDOM TRIP] trip? *Select all that apply.*

- Car, pick-up truck, or motorcycle
- RV or camper
- Bus or train
- Airplane
- Other, specify _____

Q18. *Select all that apply.* [ROTATE GROUPS AND WITHIN GROUPS; SHOW ONE GROUP AT A TIME]

_1. Which of the following did you or someone in your travel party attend or participate in while in Minnesota on your [RANDOM TRIP] trip?

- Arts and cultural activities
- Fairs/festivals/events
- Amateur sporting events/tournaments
- Professional sporting events
- Theater performances
- Parades and cultural events
- None of these

_2. Which of the following did you or someone in your travel party do or visit while in Minnesota on your [RANDOM TRIP] trip?

- Dining at unique locally-owned restaurants (non-chain)
- Nightlife, concerts and entertainment
- Driving on designated scenic byways
- Scenic drives
- Motorcycling
- Nature walks
- Sightseeing
- Viewing fall colors [ASK ONLY OF SEPT-NOV TRIPS]
- Casinos
- None of these

QUESTIONNAIRE

_3. Which of the following cold-weather activities did you or someone in your travel party participate in while in Minnesota on your [RANDOM TRIP] trip? [ONLY ASK THIS SERIES OF WINTER TRIPS]

- Ice fishing
- Cross-country skiing
- Downhill skiing/snowboarding
- Snowmobiling
- None of these

_4. Which of the following activities did you or someone in your travel party participate in while in Minnesota on your [RANDOM TRIP] trip?

- Mountain biking/fat biking
- Paved trail/road biking
- Paddling – canoeing, kayaking, paddleboard, etc.
- Motor boating/water skiing/jet skiing
- Fishing
- Hunting
- Camping
- Hiking/backpacking
- Swimming
- Golfing
- Off-roading/ATV driving
- Wildlife/bird watching
- Health and wellness activities
- Shopping
- None of these

_5. Which of the following did you or someone in your travel party visit while in Minnesota on your [RANDOM TRIP] trip?

- Friends or relatives
- Amusement parks/carnivals
- Historical attractions
- Museums and galleries
- State/national parks
- Water parks
- Wineries/breweries/distilleries
- Zoos
- Mall of America
- None of these

Q19. [SHOW ITEMS SELECTED IN Q18 PLUS "Other, specify" AND "None of these"] Which of these attractions and activities motivated you to choose Minnesota as the destination for your [RANDOM TRIP] trip? Select up to 5.

Q20. Thinking about your overall experience in Minnesota during this trip, would you say it was...?

Poor	Fair	Good	Very good	Excellent

Q21. How likely are you to recommend Minnesota to your friends or family as a destination to visit for a leisure trip?

Not at all likely	2	3	4	5	6	7	8	9	Extremely likely

Demographics

The following questions are for classification purposes only so that your responses may be grouped with those of others. [DO NOT FORCE]

marital. What is your marital status? Are you...?

- Married/Domestic Partnership/Civil Union
- Divorced/Separated
- Widowed
- Single/Never married

ppinhh. Including you, how many people are currently living in your household? _____

kids. [ASK IF ppinhh>1] How many living in your household are children under the age of 18? _____

education. Which of the following categories represents the last grade of school you completed?

- High school or less
- Some college/technical school
- College graduate
- Post-graduate degree

Income. What is your total annual household income before taxes? *In USD*

- Less than $50,000
- $50,000 - $74,999
- $75,000 - $99,999
- $100,000 - $124,999
- $125,000 - $149,999
- $150,000 or more

ethnicity. What of the following best describes your ethnic heritage? Are you... *Select all that apply.* [ALLOW MULTI]

- Caucasian/White
- African-American/Black
- Latino/Hispanic
- Asian
- American Indian
- Other (Specify _____)

gender. Do you identify as...?

- Male
- Female

orientation. Do you identify as LGBTQ?

- Yes
- No
- Prefer not to answer