EXPLORE MINNESOTA TOURISM SUMMER 2020 BUSINESS SURVEY RESULTS

1. What type of accommodation is your property? (If more than one applies, select the primary type.)
   Respondents: 307

   **Type of Accommodation**

   - Resort: 36.8%
   - Hotel/Motel: 34.5%
   - B & B/Historic Inn: 8.1%
   - Campground: 10.7%
   - Other, incl vacation home rental: 9.8%

2. What Minnesota tourism region is your property in?  
   Respondents: 307

   **Minnesota Tourism Region**

   - Northeast: 26.7%
   - Central: 26.4%
   - Northwest: 17.6%
   - Southern: 16.9%
   - Metro: 12.4%

   - **Northeast** (includes Carlton, Cook, Itasca, Kanabec, Koochiching, Lake, Pine, St Louis Counties)
   - **Central** (includes Aitkin, Benton, southern Cass, Crow Wing, Douglas, Grant, Kandiyohi, McLeod, Meeker, Mille Lacs, Morrison, Otter Tail, Pope, Sherburne, Stearns, Stevens, Todd, Wadena Counties)
   - **Northwest** (includes Becker, Beltrami, northern Cass, Clay, Clearwater, Hubbard, Kittson, Lake of the Woods, Mahnomen, Marshall, Norman, Pennington, Polk, Red Lake, Roseau, Wilkin Counties)
   - **Southern** (includes Big Stone, Blue Earth, Brown, Chippewa, Cottonwood, Dodge, Faribault, Fillmore, Freeborn, Goodhue, Houston, Jackson, Lac qui Parle, Le Sueur, Lincoln, Lyon, Martin, Mower, Murray, Nicollet, Nobles, Olmsted, Pipestone, Redwood, Renville, Rice, Rock, Sibley, Steele, Swift, Traverse, Wabasha, Waseca, Watonwan, Winona, Yellow Medicine Counties)
   - **Metro** (includes Anoka, Carver, Chisago, Dakota, Hennepin, Isanti, Ramsey, Scott, Washington, Wright Counties)
3. What portion of June through August 2020 is your property open for business, with overnight accommodations available to the public? Respondents: 307

<table>
<thead>
<tr>
<th>Portion of Summer 2020 Open for Business</th>
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<tbody>
<tr>
<td>Open all summer</td>
</tr>
<tr>
<td>Open 75%-99%</td>
</tr>
<tr>
<td>Open 50%-74%</td>
</tr>
<tr>
<td>Open 25%-49%</td>
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<tr>
<td>Open &lt; 25%</td>
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<tr>
<td>Not open at all*</td>
</tr>
</tbody>
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* “Not open at all” responses were directed to the end of the survey


<table>
<thead>
<tr>
<th>Summer Demand (units sold) - 2020 compared to 2019*</th>
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</thead>
<tbody>
<tr>
<td>Up</td>
</tr>
<tr>
<td>Same</td>
</tr>
<tr>
<td>Down 1-10%</td>
</tr>
<tr>
<td>Down 11-25%</td>
</tr>
<tr>
<td>Down 26-50%</td>
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<tr>
<td>Down 50%+</td>
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</tbody>
</table>

* Weighted average results, rebalanced to reflect Minnesota’s distribution of properties by accommodation type.
4. (continued) How does your property’s business in June through August 2020 compare with business in June through August 2019?

![Summer Revenue - 2020 compared to 2019*](image)

* Weighted average results, rebalanced to reflect Minnesota’s distribution of properties by accommodation type.

5. Which of the following best describes the progression of summer 2020 business activity at your property, compared with other recent years? Business activity … Respondents: 280

![Progression of Business Activity Over the Course of the Summer, Compared with Other Recent Years*](image)

* Weighted average results, rebalanced to reflect Minnesota’s distribution of properties by accommodation type.
6. Compared with other recent summers, which of the following best describes the origins of your property’s guests this summer? (Check all that apply.)

Respondents: 273

**Origin of Property's Guests this Summer, Compared with Other Recent Summers***

- Similar: 29.9%
- Bigger share were Minnesota residents: 46.8%
- Bigger share were non-Minnesotans from within 500 miles of my property: 12.8%
- Bigger share were non-Minnesotans from beyond 500 miles of my property: 4.7%
- I don't know: 12.9%

*Weighted average results, rebalanced to reflect Minnesota’s distribution of properties by accommodation type. Percentages total more than 100% due to multiple responses.

7. How do you expect your property's business in September and October 2020 will compare with business in September and October 2019?

Respondents: 275

**Expected Fall Demand (units sold) - 2020 compared to 2019***

- Up: 24.2%
- Same: 20.0%
- Down 1-10%: 7.3%
- Down 11-25%: 8.2%
- Down 26-50%: 17.1%
- Down 50%+: 23.1%

*Weighted average results, rebalanced to reflect Minnesota’s distribution of properties by accommodation type.
7. (continued) How do you expect your property’s business in September and October 2020 will compare with business in September and October 2019?

![Expected Fall Revenue - 2020 compared to 2019*](image)

* Weighted average results, rebalanced to reflect Minnesota’s distribution of properties by accommodation type.

8. How would you rate your business’ current financial health?  

![Current Financial Health*](image)

* Weighted average results, rebalanced to reflect Minnesota’s distribution of properties by accommodation type.
9. When do you anticipate business activity at your property will return to pre-COVID levels?

Respondents: 277

Anticipated Timing of Return to Pre-COVID Business Activity Level*

- Business activity has already surpassed pre-COVID levels: 9.6%
- Business activity has already returned to pre-COVID levels: 11.8%
  - Before the end of 2020: 3.4%
  - During the first half of 2021: 11.1%
  - During the second half of 2021: 33.0%
- During 2022: 11.2%
- During 2023: 4.5%
- Sometime beyond 2023: 1.9%
- I don’t anticipate my business will return to pre-COVID levels: 3.5%

* Weighted average results, rebalanced to reflect Minnesota’s distribution of properties by accommodation type.

Open-ended questions at the end of the survey:

10. Please comment on why you did not open for business this summer, including considerations like health and safety, financial viability, staffing issues, lack of demand from specific customers, etc.

11. What have been the biggest challenges for your business since the onset of COVID-19, and how have you addressed them? Please highlight adaptions that have been most helpful to your business operations.

12. Please provide Explore Minnesota with ideas about how we can best support Minnesota’s tourism industry right now and in the near future, including suggestions for modifications to existing industry programs.

13. Please use this space to comment on anything else you would like Explore Minnesota Tourism to know.