

Using Data & Research to Inform Digital Strategy

November 2024

EXPLORE **m** MINNESOTA™



Gretchen Nussbaum

Research Analyst

1. Support Explore Minnesota and stakeholder storytelling at the state legislature
2. Support Explore Minnesota marketing campaigns and other agency initiatives
3. Support Minnesota's Travel and Hospitality Industry through data and research

Bookmark the Explore Minnesota Industry website () and review the Research section.

- Research content includes:
- Minnesota tourism-focused research
 - Tourism and the economy data
 - List of state and federal data sources

[State of Minnesota](#)[Explore Minnesota](#)

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Minnesota Tourism Research



Minnesota Tourism Research

One-time and on-going research about Minnesota's travel industry health, visitors, and brand reputation.

Research

> Minnesota Tourism Research

Tourism and the Economy

Other Resources

Share your comments or ask a question

Data and Research:

+ [Travel Indicators Reports](#)

+ [Industry Business Conditions Survey Findings](#)

+ [Traveler Profiles](#)

+ [Brand Reputation](#)

+ [Livability Research](#)

+ [Winter Weather Impacts Research](#)

EXPLORE MINNESOTA



Data & Research Overview

Economic Impact of Tourism

American Travelers

Minnesota Travelers

Niche Activity Marketing Campaigns



Impact of Minnesota's Visitor Economy

In 2023 Minnesota had an estimated 80.2 million visitors, which is above the pre-pandemic visitation level.

Visitors spent an estimated \$14.1 billion in Minnesota and had a total economic impact of \$24.2 billion.

Tourism and related activities generated an estimated 180,473 jobs and \$8.1 billion in labor income for Minnesotans.

Tourism generated an estimated \$2.3 billion in state and local taxes. Each Minnesota household would need to be taxed an additional \$1,002 to replace visitor generated taxes received by state and local governments in 2023.



County-Level Tourism Impacts

Explore Minnesota has partnered with Tourism Economics to provide county-level economic impact of tourism data.

- 2023 spend, employment and tax tourism impacts
- 2019 – 2023 visitor tourism spend by category

Watch for an announcement of county-level economic impact data in Industry News newsletter. Subscribe to the newsletter through the Industry Opportunities section of the Industry website (<https://mn.gov/tourism-industry/>).

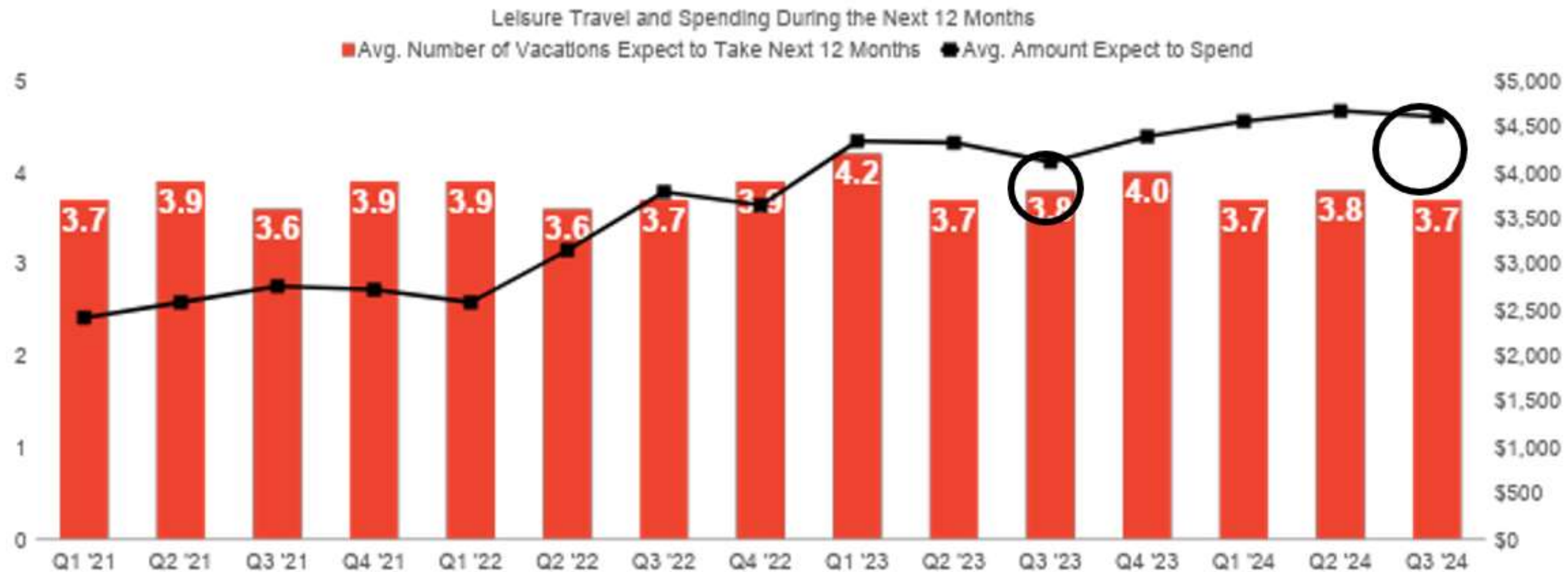


Portrait of the American Traveler

Through a digital library subscription, Explore Minnesota has access to MMGY traveler profiles, including their quarterly Portrait of the American Traveler report.

The most recent quarterly American Traveler report is for Fall 2024. The following slides contain relevant report highlights.

While the Average Intended Number of Trips Decreased Slightly Compared to Last Year, the Average Intended Spend Is Higher Than Pre-Pandemic Levels.



Spending Time With Family and “Unplugging” Continue to Be Top Motivators to Travel.



Influential When Selecting a Destination (Top 2 Box)	Q3 '23	Q3 '24
Beautiful scenery	70%	76%
Safety	57%	60%
Food and drink scene	53%	60%
Outdoor/nature activities	48%	54%
Historical significance of a destination	45%	52%
Focus on family activities	34%	35%
A sense of tradition (place family has traditionally visited)	32%	32%
Music scene	23%	25%
The ethnic diversity and multicultural population of a destination	22%	24%
Nightlife/bars	19%	20%
The destination's reputation for environmental responsibility	16%	14%
The destination's commitment to social justice and equality	11%	12%
LGBTQ+ travel offerings	6%	6%

Top Activities of Interest on Vacation

Top 25	Q3 '23	Q3 '24
Beach experiences	53%	57%
Visiting a state or national park	48%	55%
Historical sites	49%	52%
Shopping	44%	49%
Visiting a museum	43%	47%
Visiting a zoo or aquarium	41%	43%
Visiting a theme or amusement park	34%	38%
Food tours	30%	38%
Dining cruise	32%	37%
Visiting notable architectural sites	31%	36%
Attending a concert/music festival	31%	35%
Hiking/climbing/biking/other outdoor adventures	29%	34%
Guided tours with access to local experiences that are otherwise inaccessible	29%	32%
Attending a sporting event	25%	30%
Casino gambling	27%	28%
Adventure travel	24%	27%
Nightlife	23%	26%
Cooking, wine or cocktail classes	21%	26%
Dinner theater	24%	25%
Spa services (massages, facials, etc.)	22%	25%
Exploring family's ancestry/past on a heritage vacation	21%	24%
Camping	25%	22%
Attending performing arts events	19%	22%
Water sports (waterskiing, boating/rafting)	19%	22%
Film/art festivals	18%	19%



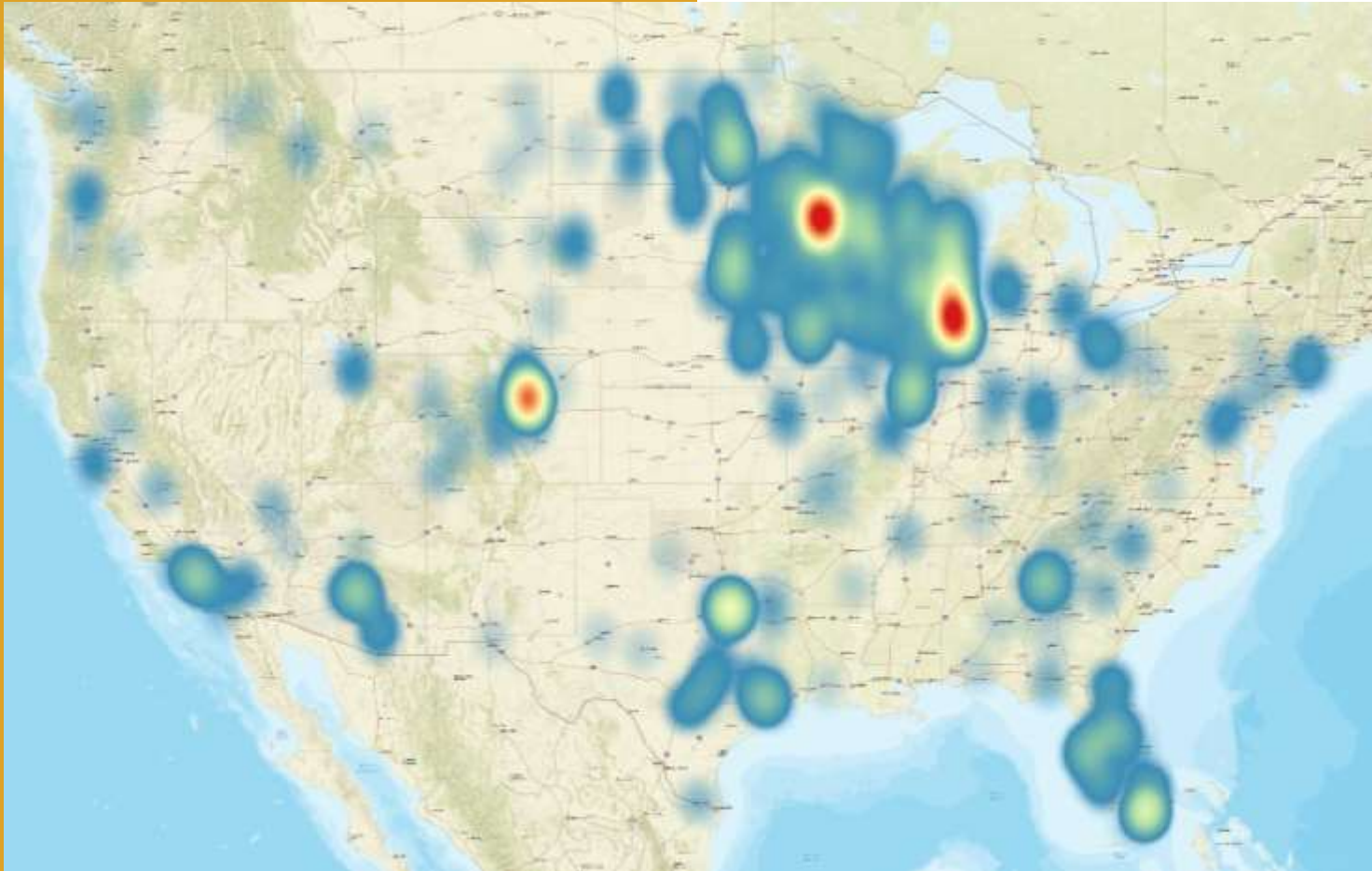
Minnesota Traveler Profile

Explore Minnesota partners with SMARInsights to study Minnesota leisure travelers.

The most recent Minnesota Visitor Profiles were completed in 2023 to clarify post-pandemic visitor characteristics and behaviors.

Separate Spring/Summer and Winter Traveler Profiles were developed. While upcoming slides focus on summer visitors, winter visitor trends are similar.

VISITOR ORIGIN MARKETS



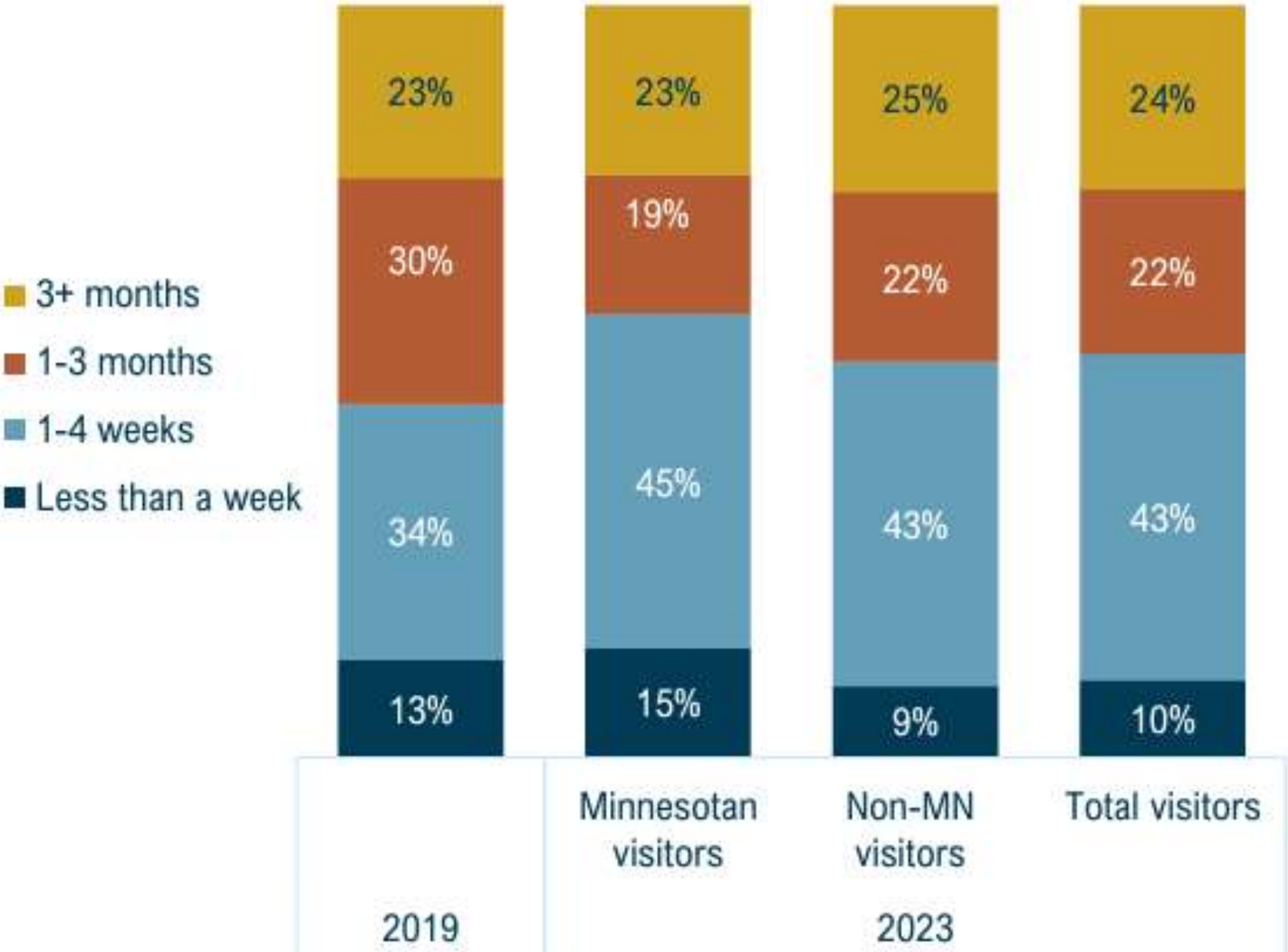
MN visitation as share of total	
MN	60%
WI	8%
IA	4%
ND	4%
IL	3%
SD	3%
FL	2%
TX	2%
AR	1%
CA	1%
CO	1%
GA	1%
IN	1%
KS	1%
MI	1%
MO	1%
NE	1%
OH	1%
PA	1%
WA	1%
AZ	1%

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

TRIP PLANNING



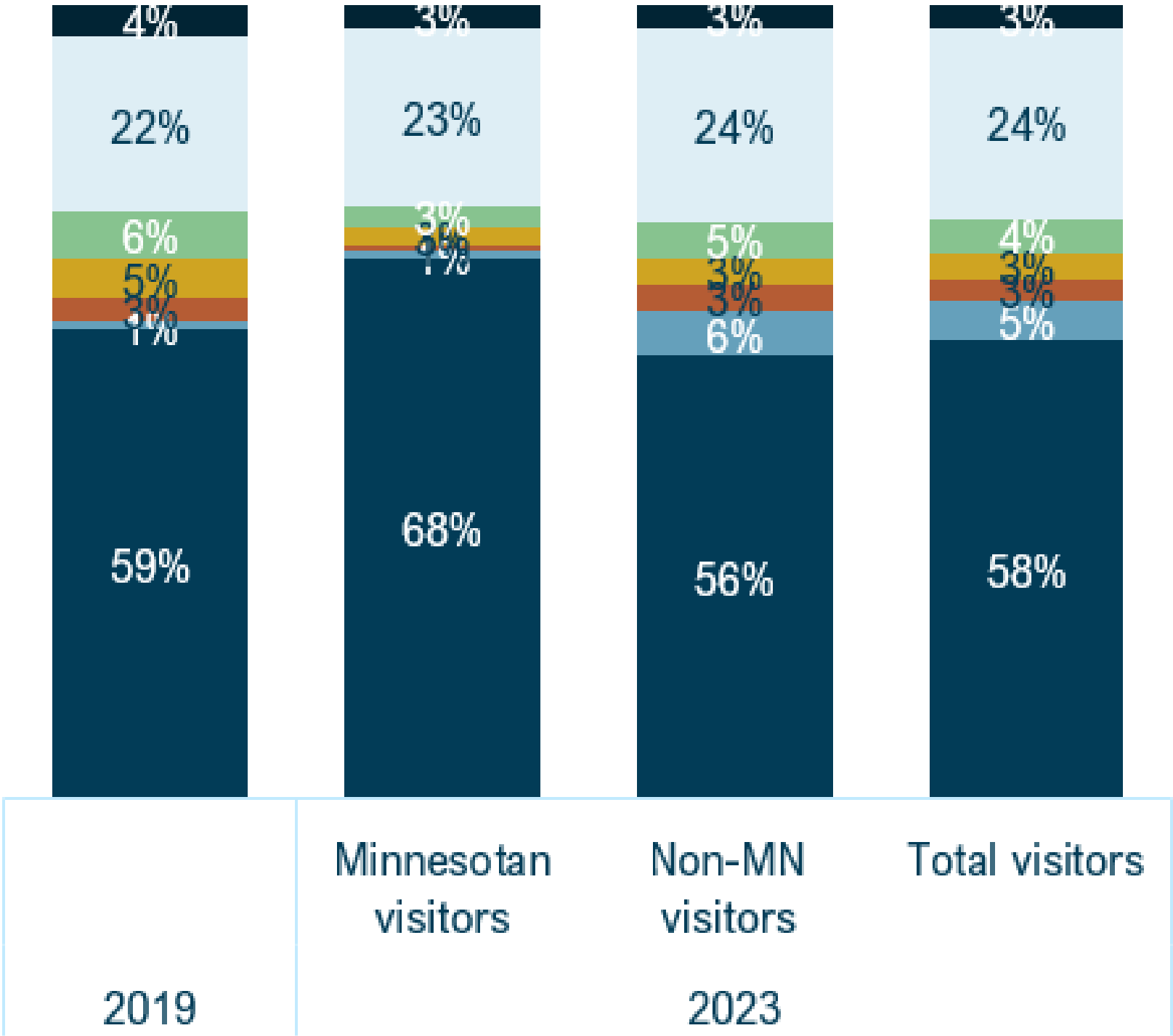
How far ahead of your trip did you choose your Minnesota destination as the place you would visit?



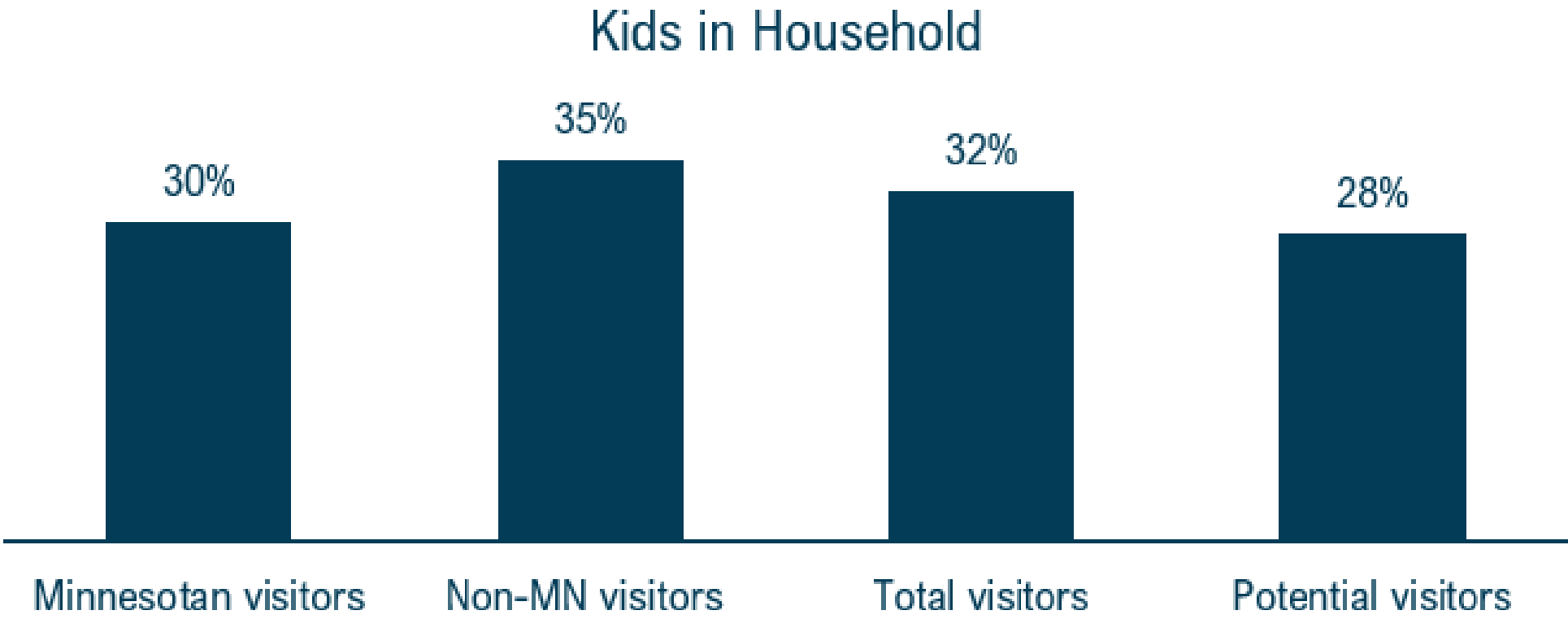
TRIP PURPOSE

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

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



KIDS IN HOUSEHOLD



MN REGIONS VISITED



MN Tourism Regions Visited
in Spring/Summer 2019 and 2023

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

POTENTIAL VISITORS – TOP ACTIVITIES BY SEASON

2023 Potential Minnesota Visitor Top Activities by Season

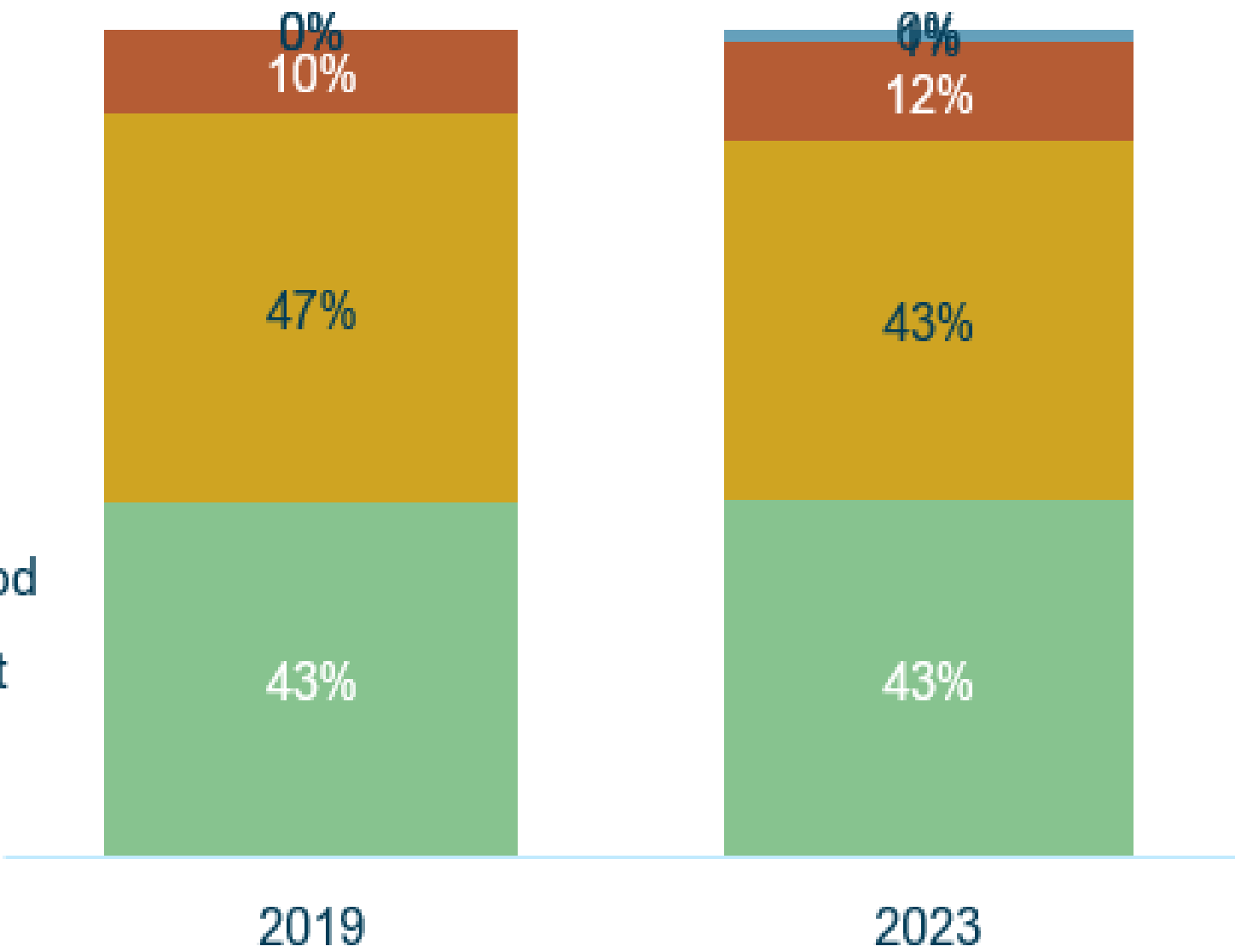
Spring		Summer		Fall		Winter	
Sightseeing	59%	Scenic drives	58%	Sightseeing	62%	Sightseeing	59%
Nature walks	58%	Sightseeing	57%	Viewing fall colors	61%	Nature walks	58%
Dining at unique locally-owned restaurants	57%	Dining at unique locally-owned restaurants	54%	Nature walks	60%	Scenic drives	47%
Scenic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

VISITOR SATISFACTION



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

- Poor
- Fair
- Good
- Very good
- Excellent





Marketing Niche Selection

Explore Minnesota selects marketing niches based on a variety of factors:

- Are there a sufficient number of leisure traveler households interested in the niche activity?
- Will niche ads drive incremental trips to Minnesota?
- Will average niche trip spend be above average leisure trip spend?
- Is the niche activity something Minnesota can uniquely promote?



Winter 2024/2025 Niches

We define broad activities clearly in order to facilitate the development of on-point creative and effective media targeting.

Performing Arts - Focused on theater and music performance for a live audience.

Winter Sports – Focused on cross-country and downhill skiing, snowboarding and snowmobiling.



Niche Research Briefs

Through desktop research, we gather niche activities information on several considerations:

- U.S. audience
- Top U.S. and Midwest destinations
- Minnesota activity offerings
- Minnesota appeal and differentiation

Pull inputs from a range of sources:

- Government data
- Associations
- News article
- Reddit



Performing Arts Research 1

U.S. Audience

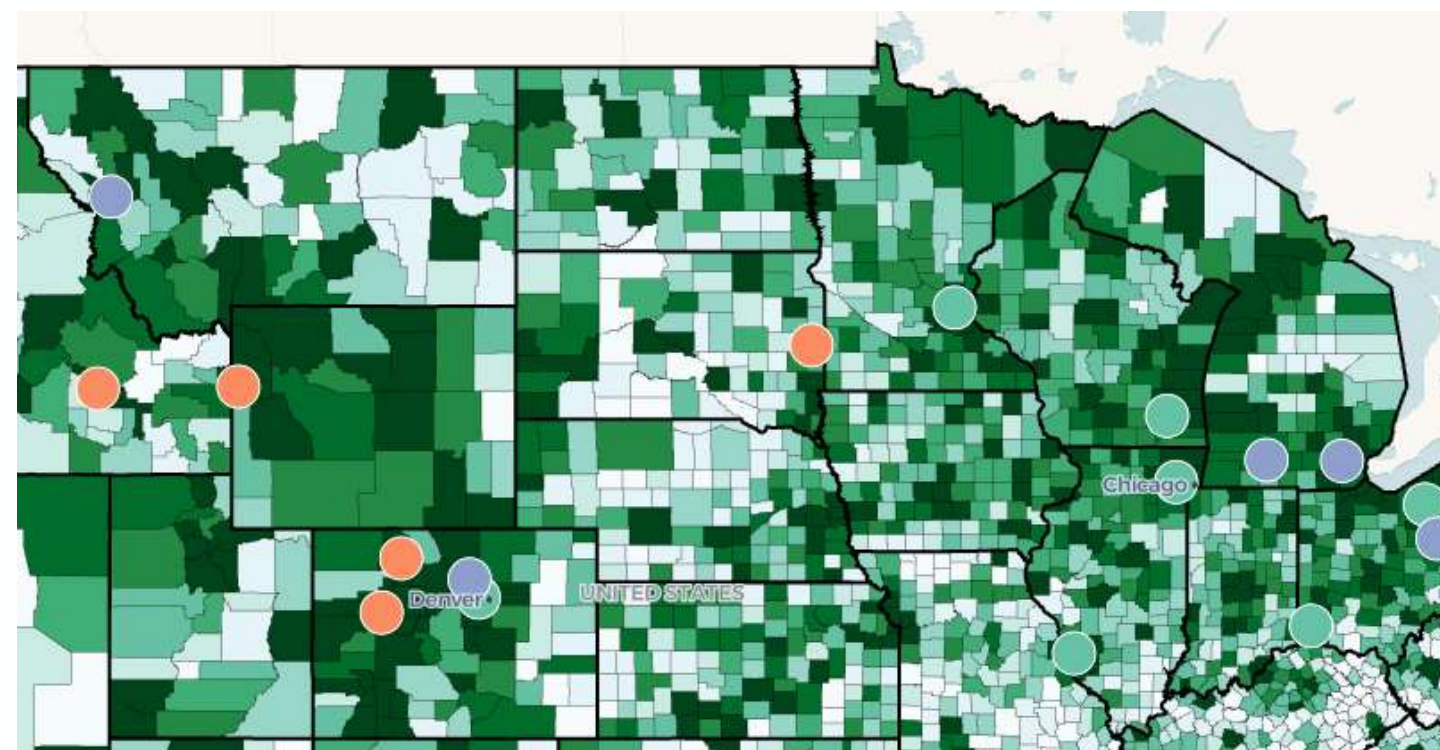
- Key source: 2022 study from the National Endowment for the Arts
 - Just under half (48 percent) of all American adults attended at least one arts event in person annually.
 - Social media and peer-to-peer communications were the most commonly cited mechanisms for learning about in-person arts events.



Performing Arts Research 2

Top U.S. & Midwest Destinations

- Key sources: U.S. Bureau of Economic Analysis (BEA) and SMU Data Arts
 - In 2023 SMU Data Arts ranked Minneapolis the #6 large vibrant arts U.S. community.





Performing Arts Research 3

Minnesota Offerings

Key sources: Explore Minnesota database, google and SME (Devon!)

- Minnesota has hundreds of performing arts venues across the state. Some popular venues by MN tourism region are:
 - **Central:** Franklin Arts Center
 - **Metro:** Guthrie...
 - **Northeast:** Duluth Playhouse...
 - **Northwest:** The Sanford Center...
 - **Southern:** The Fairmount Opera House...



Performing Arts Research 4

Minnesota Appeal

Key sources: Reddit and travel forums

- The great thing about theatre here is that there are so many niches. We're not all trying to make it to Broadway, so there is incredible diversity. There are many multi-cultural companies, community-based companies, and weird companies who do strange experimental installations. Everything is unique and they aren't all trying to fit into a mold that one type of audience will enjoy.
- I'm a bit biased as I'm running sound for a show at the Guthrie as I type this, but I have to turn down theatre work every week because there is so much work for competent theatre technicians. My (now) wife came here for college and stayed because of the theatre opportunities available here. Art Galleries, are well represented. It's a supportive arts community that helps the helpful and scorns backstabbing. The art keeps me here.



Devon Cox

Digital Strategy Manager

1. Lead website, social media, and email marketing team.
2. Support Minnesota's economy by driving online traffic and inspiring travel through engaging content.
3. Advise internal and external stakeholders on best practices and industry trends.

Turning Data into Tactics

Core Principals

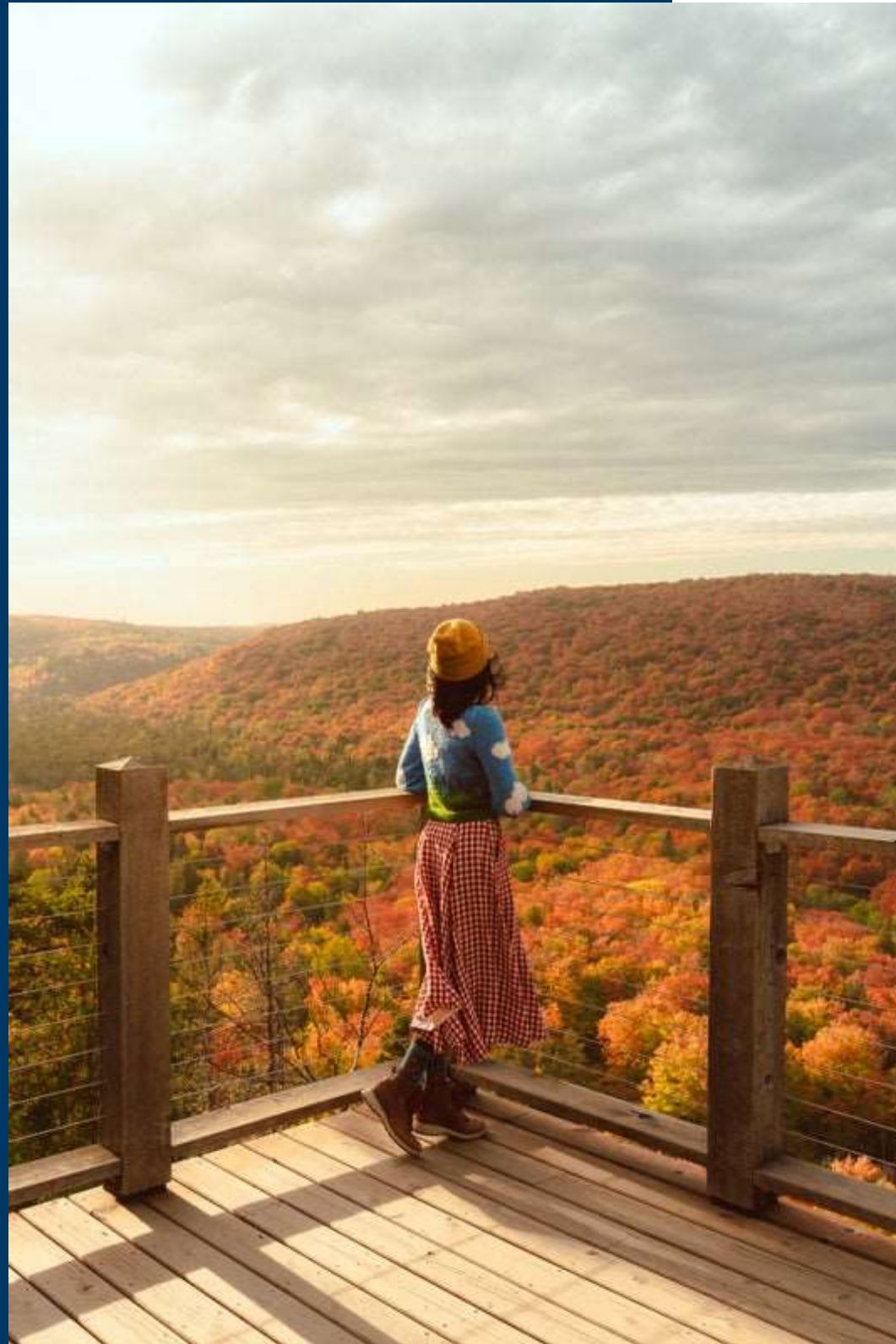
- What are the repeated themes we see appearing in our research?
- What do we already know about our audiences and what tactics they respond to?
- What to we already know about what's happening in digital media markets?
- How do these things interact?



Case Study: Performing Arts

Key Themes from Our Research

- Social media is a key way audiences find out about performing arts events.
- The strength of MN's theater scene is its diversity.
- The Guthrie is a key player.



Case Study: Performing Arts Our Audience

- Motivated by spending time with significant other or family.
- Cares about beautiful scenery.
- Those interested in performing arts are also interested in food & drink.
- Top OOS markets are from midwestern cities without a flagship regional theater.



Case Study: Performing Arts Digital Marketing Landscape

- Users react to authentic, POV-video that doesn't feel too professional or "produced."
- Short-form video outperforms static images, especially with users who don't already know us.



What We Landed On

Digital Marketing Landscape

- A short-form phone-filmed video with a "date night" angle at the Guthrie, featuring dinner at a local restaurant, gorgeous views/scenery, and a casual/voicely V.O.
- Created internally (to save resources). Placed on Instagram/TikTok.
- Leads to [this page](#), a performing arts guide that emphasizes our city's diverse landscape and requires an email conversion to unlock.





Questions?

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