

SUMMARY RESULTS: 2012 EXPLORE MINNESOTA TOURISM "HOW ARE WE DOING?"

- Survey purpose, invitation list, and response rate: Explore Minnesota Tourism (EMT) conducted an informal, online organizational assessment survey in November 2012 to solicit feedback from Minnesota's tourism industry about EMT's services and staff, EMT interactions with the tourism industry, and various EMT marketing and promotional programs. The survey provided an opportunity for respondents to rate the quality and/or importance of specific components in these areas, and also included numerous open-ended questions to allow more specific feedback. Email invitations, including a link to the survey, were successfully delivered to 3,463 accommodations (indoor lodging properties and campgrounds), attractions, events and tourism organizations throughout Minnesota that have provided EMT with an email address. A total of 382 survey responses were received for an 11% response rate. Results reported here reflect all responses, including those of 64 respondents who answered at least some questions but did not complete the entire survey.

Survey results will help direct EMT's programs, and provide insights into areas where improvement or changes may be needed. This process will facilitate EMT being as effective as possible in working with the industry to promote travel to and within our state. Results reported here reflect self-reported responses to the survey.

- Familiarity with EMT: The first question on the survey asked respondents about their level of familiarity with EMT services and programs. On a four point scale, from "1" (very familiar) to "4" (not at all familiar), 27% of respondents checked "1," 52% checked "2" and 29% checked "3." Eleven respondents (3%) who indicated that they were not at all familiar with EMT services and programs were directed to a section of the survey that provided links and contacts for information about EMT. Before exiting the survey, they were also asked if they would like to receive a call or email from an EMT regional manager. Appropriate EMT staff followed up where requested.

- Overall ratings: Two broad ratings questions provided relatively positive feedback for the quality of services provided by EMT and for the professionalism and support provided by EMT staff. On a four-point scale, from "1" (excellent) to "4" (poor), 34% of respondents rated the quality of EMT services as excellent and another 53% checked the second highest rating for a total of 87% positive ratings. Regarding the professionalism and support provided by EMT staff, 50% of respondents rated the EMT staff as excellent and another 39% checked the second highest rating for a total of 90% positive ratings.

- Ratings of EMT service quality in program areas: Positive ratings (i.e., ratings of "1" and "2" on a four-point scale where 1 = excellent and 4 = poor) for seven services provided by EMT ranged from a high of 78% for domestic marketing/advertising to a low of 26% for international marketing. However, many results were impacted by a high number of "does not apply; or I'm not aware of this" responses (referenced hereafter as NA). For example, 58% of respondents checked NA for international marketing and 39% checked NA for group and package travel. High NA results may indicate that programs/services are focused on a limited group of businesses or certain industry sectors, or may point toward opportunities to build awareness of services and their relevance to the industry.

The following list ranks EMT program areas on the positive ratings they received, using positive rating percentages that were calculated using a base of "1" through "4" responses (i.e., after subtracting NA responses from the base used for calculating percentages). As an example, domestic marketing/advertising received 28 NA responses, representing 9% of 317 total responses. After subtracting the 28 NA responses, 85% of the remaining 289 responses were either a "1" or a "2". The percent of respondents with positive ("1" and "2") service quality ratings for each program area was:

- Domestic marketing/advertising – 85% (9% NA)
- State highway travel information centers – 84% (16% NA)
- Travel brochures/publications for consumers – 83% (7% NA)
- Electronic marketing (including www.exploreminnesota.com) – 80% (3% NA)
- Media relations – 76% (23% NA)
- Group and package travel – 70% (39% NA)
- International marketing – 62% (58% NA)

- Ratings of EMT in areas of interactions with the tourism industry: Positive ratings (i.e., ratings of "1" and "2" on a four-point scale where 1 = excellent and 4 = poor) for nine areas of interactions with the tourism industry ranged from a high of 80% for EMT Express (electronic newsletter) to a low of 37% for organizational partnership grants. Again, several categories were impacted by a high number of NA responses, including other conferences and seminars (45% NA), organizational partnership grants (41% NA) and annual tourism conference (35% NA). After removing NA responses from the base used for calculating percentages, the percent of respondents with positive ("1" and "2") ratings for each area of interactions was:

- Overall relations with the tourism industry – 87% (11% NA)
- EMT Express (electronic newsletter) – 86% (7% NA)
- Online updates of listings and events – 81% (8% NA)
- Industry website (www.industry.exploreminnesota.com) – 80% (24% NA)
- Research/reports on travel trends – 75% (19% NA)
- Annual tourism conference – 74% (35% NA)
- Regional offices/industry outreach – 72% (29% NA)
- Organizational partnership grants – 68% (41% NA)
- Other conferences and seminars – 67% (45% NA)

- Importance of various EMT marketing and promotional programs for EMT: Ratings of "important" (i.e., ratings of "1" and "2" on a four-point scale where 1 = very important and 4 = not at all important) for eight issues for future efforts ranged from a high of 95% for marketing to a low of 50% for amateur sports marketing. Fewer respondents to future efforts issues checked NA, with no issue receiving more than 17% NA responses and most issues receiving only single-digit NA responses. After removing NA responses from the base used for calculating percentages, the percent of respondents with important ("1" and "2") ratings for each future efforts issue was:

- Raising awareness of the importance of tourism – 94% (1% NA)
- Electronic marketing (including www.exploreminnesota.com) – 93% (1% NA)
- Domestic marketing/advertising – 90% (4% NA)
- State tourism funding – 89% (4% NA)
- Research on economic impact, travel trends, etc. – 87% (4% NA)
- Media relations – 85% (4% NA)
- Co-op marketing – 85% (12% NA)
- Marketing partnerships with private sector – 83% (9% NA)
- Marketing partnerships with public sector – 81% (9% NA)
- Providing educational opportunities to the industry – 80% (5% NA)
- Partnership grants – 80% (13% NA)
- Meetings and conventions marketing – 72% (10% NA)
- PedalMN biking promotion – 71% (11% NA)
- Group and package travel – 70% (12% NA)
- International marketing – 61% (17% NA)
- Amateur sports marketing – 50% (14% NA)

- Responses by region: The distribution of survey responses by region was as follows:

- Central – 25%
- Northeast – 21%
- Metro – 21%
- Southern – 18%
- Northwest – 15%

- Respondent's position in the tourism and hospitality industry: The distribution of survey responses by position was as follows:

- General manager/owner – 50%
- Chamber/CVB/tourism association director – 21%
- Sales and marketing – 13%
- Government employee – 5%
- Other – 11%

- Respondent's industry sector affiliation: The distribution of survey responses by industry sector affiliation of the respondent was as follows:

- Lodging/campground – 46%
- Chamber/CVB/tourism association – 21%
- Other type of attraction – 10%
- Park or historic site – 6%
- Other government facility/organization – 4%
- Retail – 2%
- Other – 12%

- Responses to open-ended questions: Numerous open-ended questions (i.e., asking for comments) throughout the survey provided opportunities for respondents to provide more specific feedback. Given the relatively broad areas covered by some response categories, responses to these questions were very helpful in getting to the heart of what was important to respondents. Many contained specific comments about experiences with EMT staff or about things that are or are not working well, and some included helpful suggestions for how to do things differently.

The EMT consumer website was the focus of numerous comments, including both positive and negative feedback. Some comments focused on how well the website and other EMT marketing venues generate business for the respondent, and respondents' experiences updating online listings and events. Other comments addressed the industry website (i.e., www.industry.exploreminnesota.com), including suggestions for streamlining access to information and other improvements. Specific concerns about the consumer and industry websites have been noted, and will be considered as EMT continues to develop the websites.

Numerous comments pointed to a secondary, educational aspect of surveys like this. The simple process of going through lists of EMT services, issues and marketing/promotional programs included in the survey raised respondents' awareness of these things, leading to comments like this: "I was not aware of a lot of stuff Explore Minnesota does." Other comments indicated a lack of apparent relevance of EMT information and/or services to respondents. (Note: EMT's "industry website", including a sizable research section with links to other resources, is a good place to look for relevant information. While not all information included on the site will be relevant to all tourism businesses/organizations, a glance through the industry website may reveal unexpected, helpful information for current use and/or future reference.)

Summary statistics for the "how are we doing?" survey can be viewed online at:
<http://www.exploreminnesota.com/download.aspx?id=3582>.

To view results, click on the link, or copy and paste it into your web browser.