

SUMMARY RESULTS: 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 December 2009 to solicit feedback from Minnesota's tourism industry about EMT's services, staff, interactions with the tourism industry, issues for future efforts and marketing tactics. 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. E-mail invitations, including a link to the survey, were sent to 3,538 accommodations (indoor lodging properties, campgrounds and state parks), attractions and tourism organizations throughout Minnesota that have provided EMT with an e-mail address. A total of 470 survey responses were received for a 13% response rate. Results reported here reflect all responses, including those of 54 respondents who answered at least some questions but did not get as far as clicking "done" on the final page to register as a completed survey. Survey results will help direct EMT's programs, and provide valuable insights into areas needed for improved service. This process will facilitate EMT doing our best possible job for the industry in promoting travel to our state. Results reported here reflect self-reported data from respondents to the survey.

- 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), 41% of respondents rated the quality of EMT services as excellent and another 50% checked the second highest rating for a total of 91% positive ratings. Regarding the professionalism and support provided by EMT staff, 56% of respondents rated the EMT staff as excellent and another 38% checked the second highest rating for a total of 94% 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 eight services provided by EMT ranged from a high of 80% for electronic marketing (including www.exploreminnesota.com) to a low of 19% 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, 71% of respondents checked "NA" for international marketing, 55% checked "NA" for St. Paul contact center (e.g., phone counseling), and 43% 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 percents that were calculated using a base of "1" through "4" responses (i.e., after subtracting "NA" responses from the base used for calculating percents). As an example, domestic marketing received 54 NA responses, representing 13% of 431 total responses. After subtracting the 54 NA responses, 88% of the remaining 377 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 – 88% (13% NA)
- Electronic marketing (including www.exploreminnesota.com) – 85% (6% NA)
- St. Paul contact center (e.g., phone counseling) – 85% (55% NA)
- Travel brochures/publications for consumers – 85% (10% NA)
- State highway travel information centers – 84% (20% NA)
- Media relations – 79% (27% NA)
- Group and package travel – 71% (43% NA)
- International marketing – 64% (71% 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 eight areas of interactions with the tourism industry ranged from a high of 80% for overall relations with the tourism industry to a low of 39% for organizational partnership grants. Again, several categories were impacted by a high number of "NA" responses, including other conferences and seminars (50%), organizational partnership grants (49% "NA") and annual tourism conference (45%). After removing "NA" responses from the base used for calculating percents, the percent of respondents with positive ("1" and "2") ratings for each area of interactions was:

- EMT Express (electronic newsletter) – 92% (22% NA)
- Overall relations with the tourism industry – 89% (16% NA)
- Industry website (industry.exploreminnesota.com) – 83% (29% NA)

Annual tourism conference – 80% (45% NA)
Regional offices/industry outreach – 79% (36% NA)
Research/reports on travel trends – 79% (27% NA)
Organizational partnership grants – 78% (49% NA)
Other conferences and seminars – 76% (50% NA)

- Importance of issues for future efforts of 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 55% for tying in to Legacy Amendment programs and funds. Fewer respondents to future efforts issues checked “NA”, with no issue receiving more than 26% “NA” responses and most issues receiving only single-digit “NA” responses. After removing “NA” responses from the base used for calculating percents, the percent of respondents with important (“1” and “2”) ratings for each future efforts issue was:

Marketing – 97% (2% NA)
Raising awareness of the importance of tourism – 93% (3% NA)
Funding – 90% (9% NA)
Research on economic impact, travel trends, etc. – 82% (5% NA)
Providing educational opportunities to the industry – 79% (8% NA)
Tourism product development – 78% (8% NA)
Public policy – 75% (12% NA)
Tying in to Legacy Amendment programs and funds – 74% (26% NA)

- Importance of marketing tactics 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 ten marketing tactics ranged from a high of 93% for electronic marketing (including www.exploreminnesota.com) to a low of 52% for international marketing. As with future efforts issues, relatively few respondents to marketing tactics checked “NA”, with no tactic receiving more than 18% “NA” responses and half receiving only single-digit “NA” responses. After removing “NA” responses from the base used for calculating percents, the percent of respondents with important (“1” and “2”) ratings for each marketing tactic was:

Domestic marketing – 97% (5% NA)
Electronic marketing (including www.exploreminnesota.com) – 96% (3% NA)
Marketing Minnesota’s tourism regions – 92% (4% NA)
Media relations – 89% (7% NA)
Marketing partnerships with public sector – 86% (9% NA)
Marketing partnerships with private sector – 85% (10% NA)
Group and package travel – 76% (10% NA)
Meetings and conventions marketing – 71% (12% NA)
Sports marketing – 62% (13% NA)
International marketing – 57% (18% NA)

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

Southern – 23%
Central – 22%
Metro – 22%
Northwest – 17%
Northeast – 15%

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

General manager/owner – 44%
Chamber/CVB/tourism association director – 15%
Sales and marketing – 13%
Government employee – 12%
Other – 16%

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

Lodging/campground – 36%

Chamber/CVB/tourism association – 16%
Park or historic site – 11%
Other type of attraction – 9%
Other government facility/organization – 5%
Retail – 5%
Other – 18%

- 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 things that are or are not working well, and some included helpful suggestions for how to do things differently.

The EMT website was the focus of many comments, including both positive and negative feedback. Some comments were very focused on whether or not the website and other EMT marketing venues generate business for the respondent, again including a mix of positives and negatives. A few comments included questions that EMT staff have subsequently responded to. In addition, specific concerns about the website have been noted, and will be considered as the website continues to evolve.

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 tactics included in the survey raised respondents' awareness of these things, leading to comments like this: "I was unaware of the industry website and regional offices. Guess I will look that up on the web." 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=3184>

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