Rochester applied research project
Executive summary

University of Minnesota Tourism Center

April 2026

EXPERIENCE
ROCHESTER, MINNESOTA

Project purpose

- Set the stage for a long-range tourism master plan for the City of Rochester:
  - Assess resident and business sentiment
  - Understand its image among its geographic target markets
  - Eventually inform new tourism strategies

Methodology

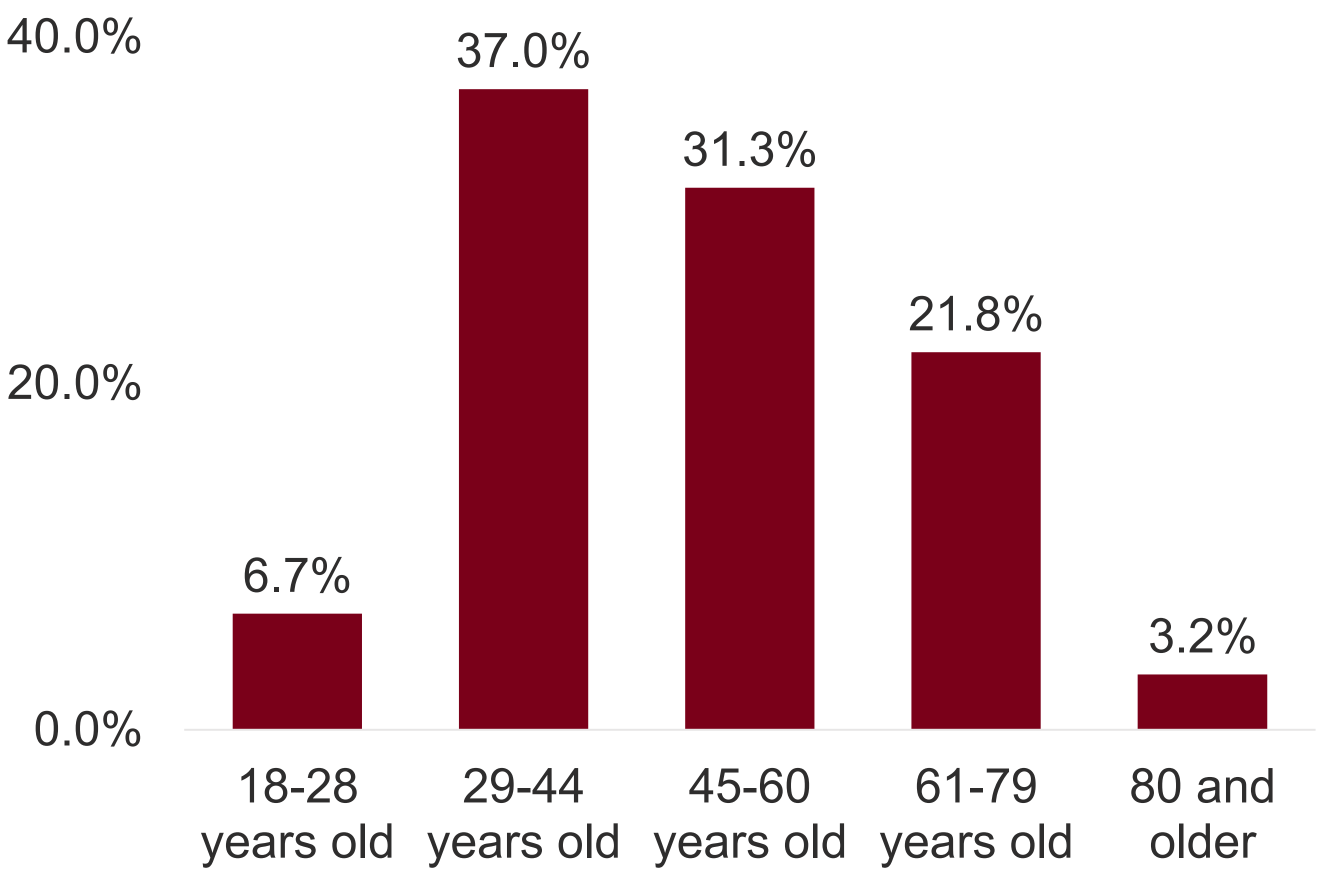
- Three electronic surveys:
  - Co-created by Experience Rochester and Tourism Center
  - Based on project needs and past Extension projects

	Business survey	**Resident survey**	**Non-visitor survey**
Data collection time period	February 13th – April 6th, 2026	February 13th – March 22nd, 2026	February 18th – March 17th, 2026
Survey distribution	by Experience Rochester	by Experience Rochester	Online panel
# completed usable responses	139	509	607

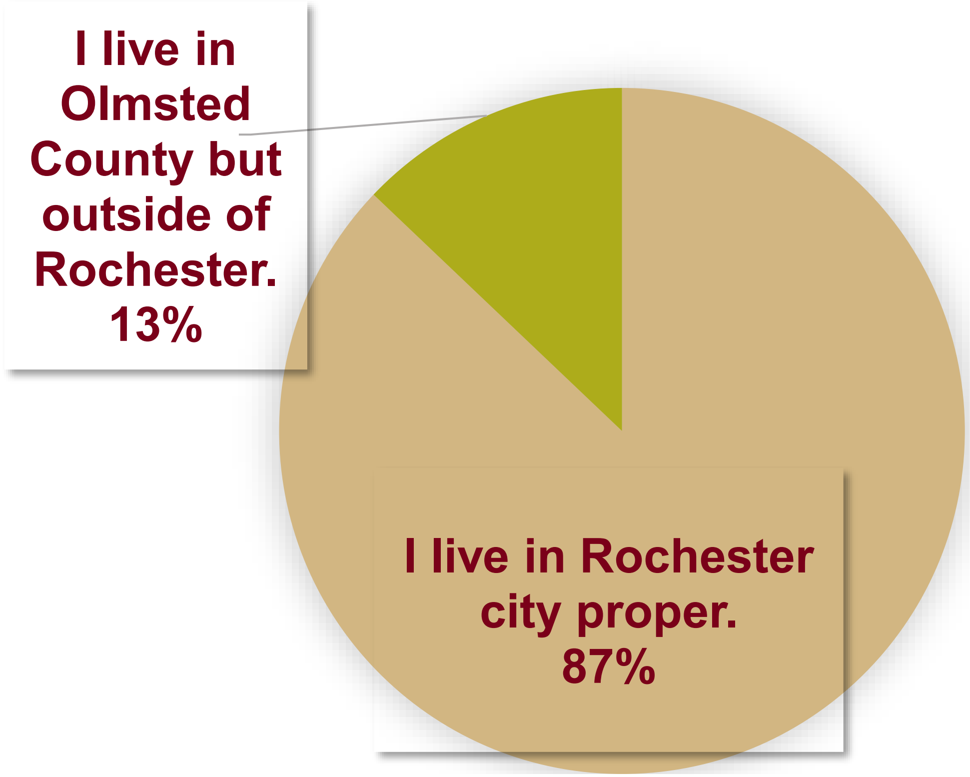
Resident survey: Key findings

Respondents' age

- 37% Millennials (29-44 years old)
- 31.3% Gen Xers (45-60 years old)
- 21.8% Baby Boomers (61-79 years old)
- 6.7% Gen Z (18-28 years old)



Rochester is closely connected to many communities. Please indicate where you live.

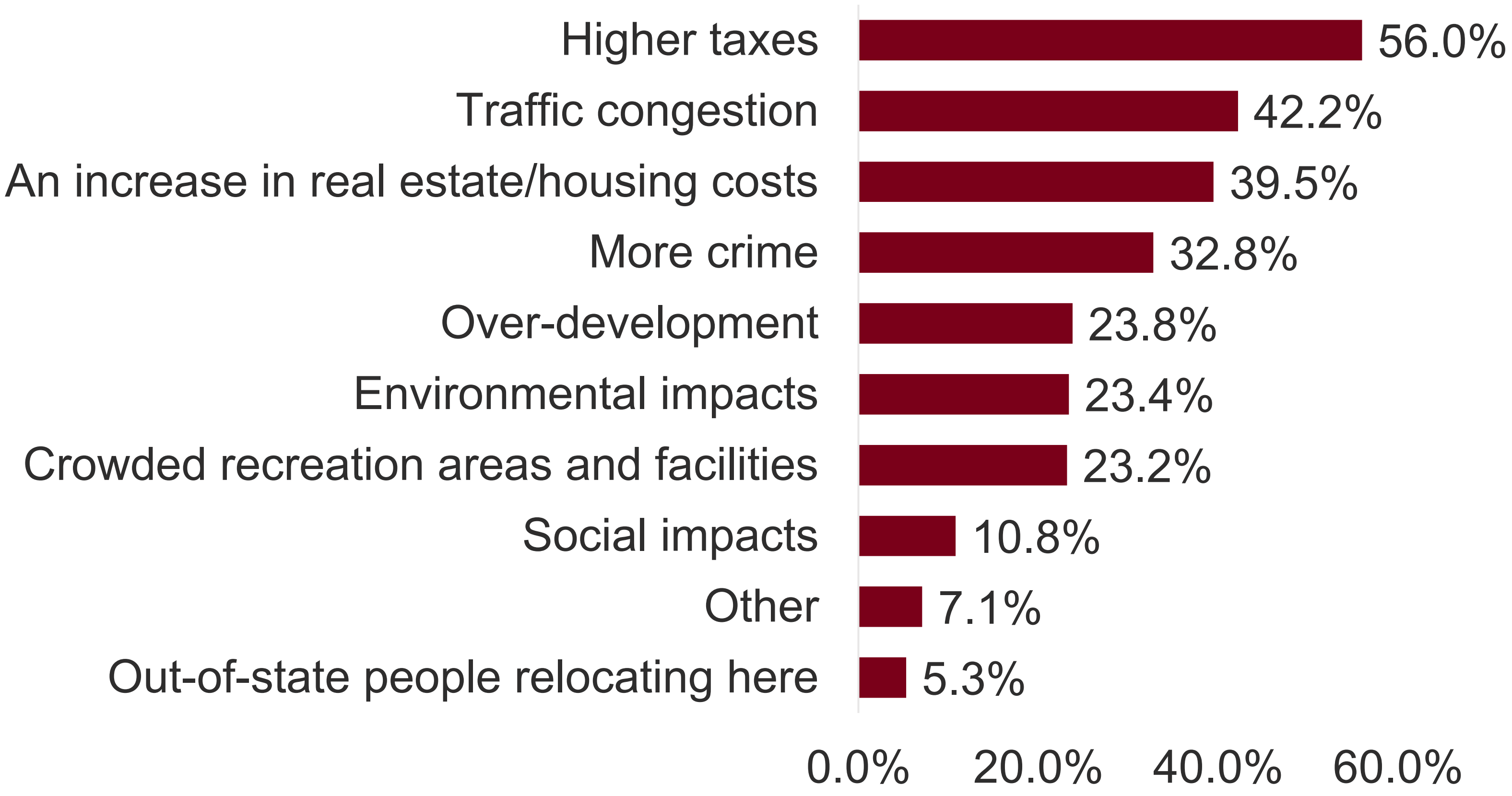


- 87% live in Rochester city proper.
- 13% live in Olmsted County but outside of Rochester.
- No respondent lives outside of Olmsted County.

Top three goals for non-medical tourism growth benefitting you or the community

- Top three most identified goals: More entertainment (44.8%), recreational opportunities (43.4%), more attractions (42%)

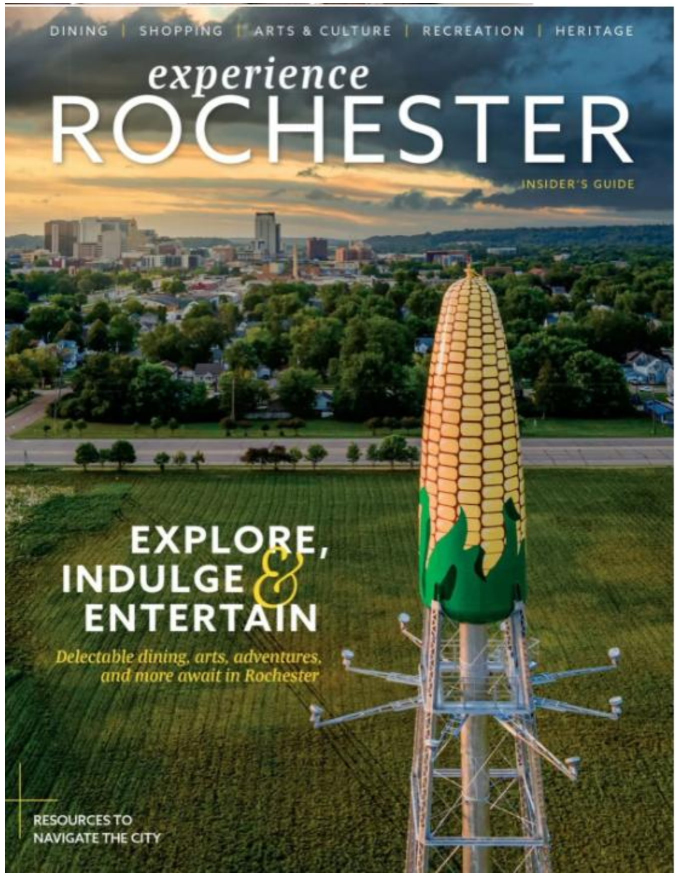
Top three concerns about how non-medical tourism growth may affect you or the community



- #1 concern: Higher taxes (56%)
- At least one-third concerned about: traffic congestion (42.2%), increase in real estate / housing costs (39.5%), and more crime (32.8%)

What do you like about Rochester as a non-medical visitor destination?

- Parks, trails, outdoor spaces
- Restaurants / dining
- Friendly people
- Events & entertainment
- Clean, safe, well-maintained community
- Family friendly and schools
- Healthcare presence
- Convenient size; easy to navigate



What do you think Rochester needs to have in order to become a vibrant non-medical visitor destination?

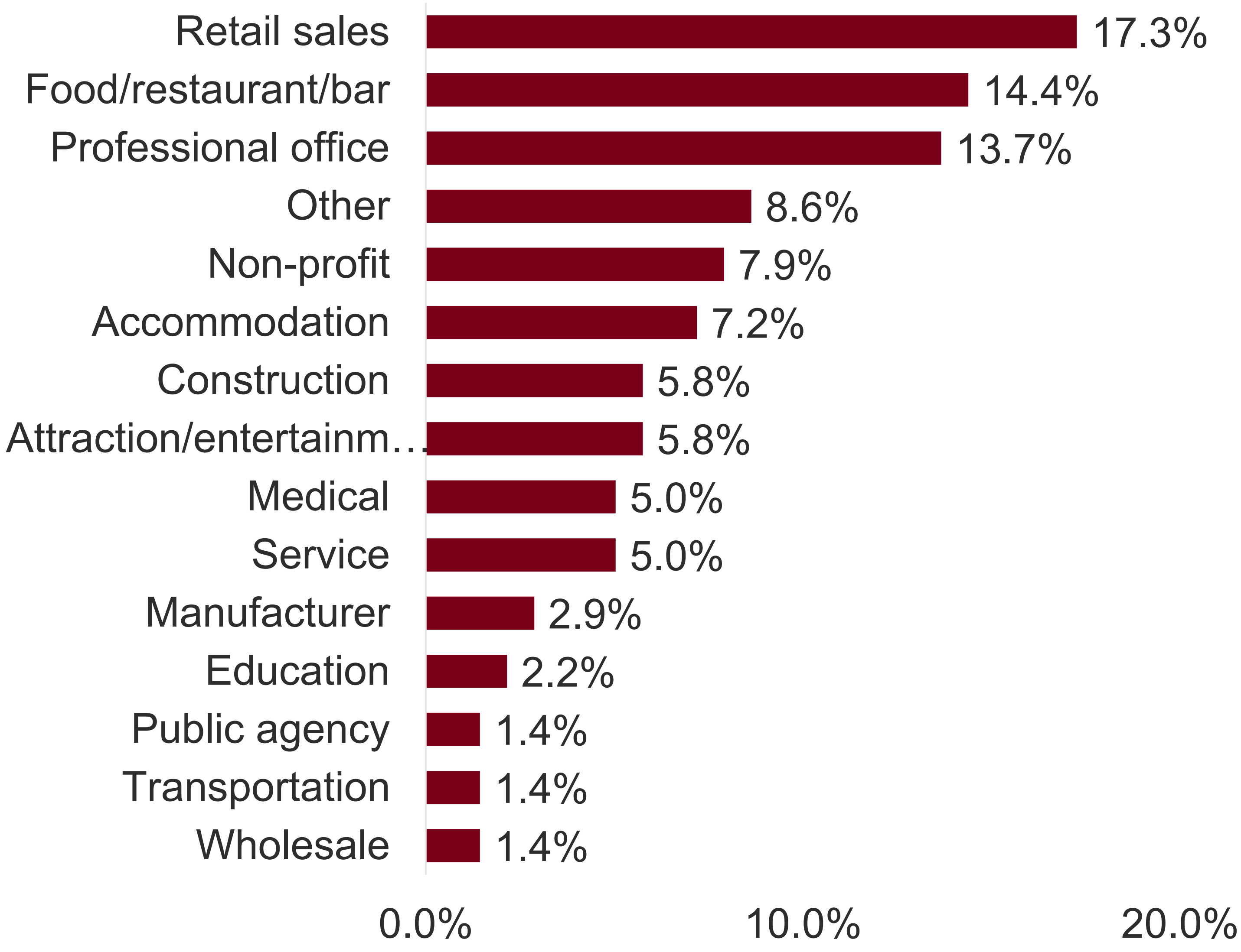
- More entertainment and things to do
- Arts, culture, events
- Downtown improvement / revitalization
- Youth activities and family spaces
- Restaurants and food variety
- Transportation / infrastructure
- Shopping / retail expansion
- Cost (esp. housing) and affordability concerns
- More public spaces, parks, green areas

More than 15% of residents who answered this question commented on over-reliance on Mayo Clinic.

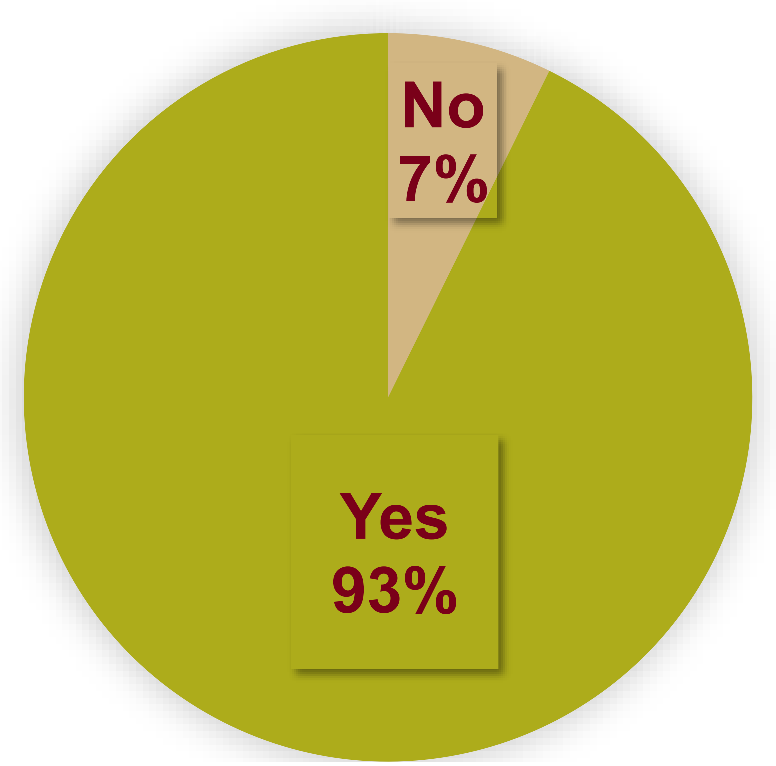
Business survey: Key findings

Which category most accurately describes your organization type?

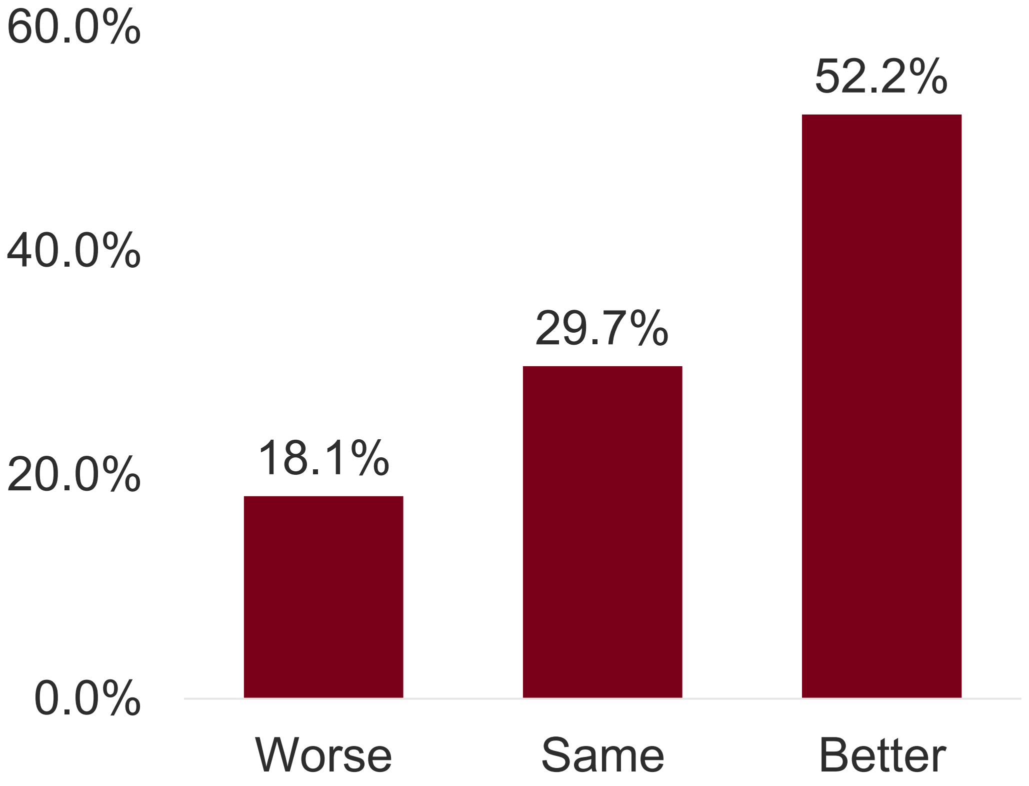
- 17.3%: Retail sales
- Approx. 14%: Food, restaurants, bars (14.4%) and professional office (13.7%)
- 7.9% non-profits and 7.2% accommodations.



Are you optimistic about the future of your organization?

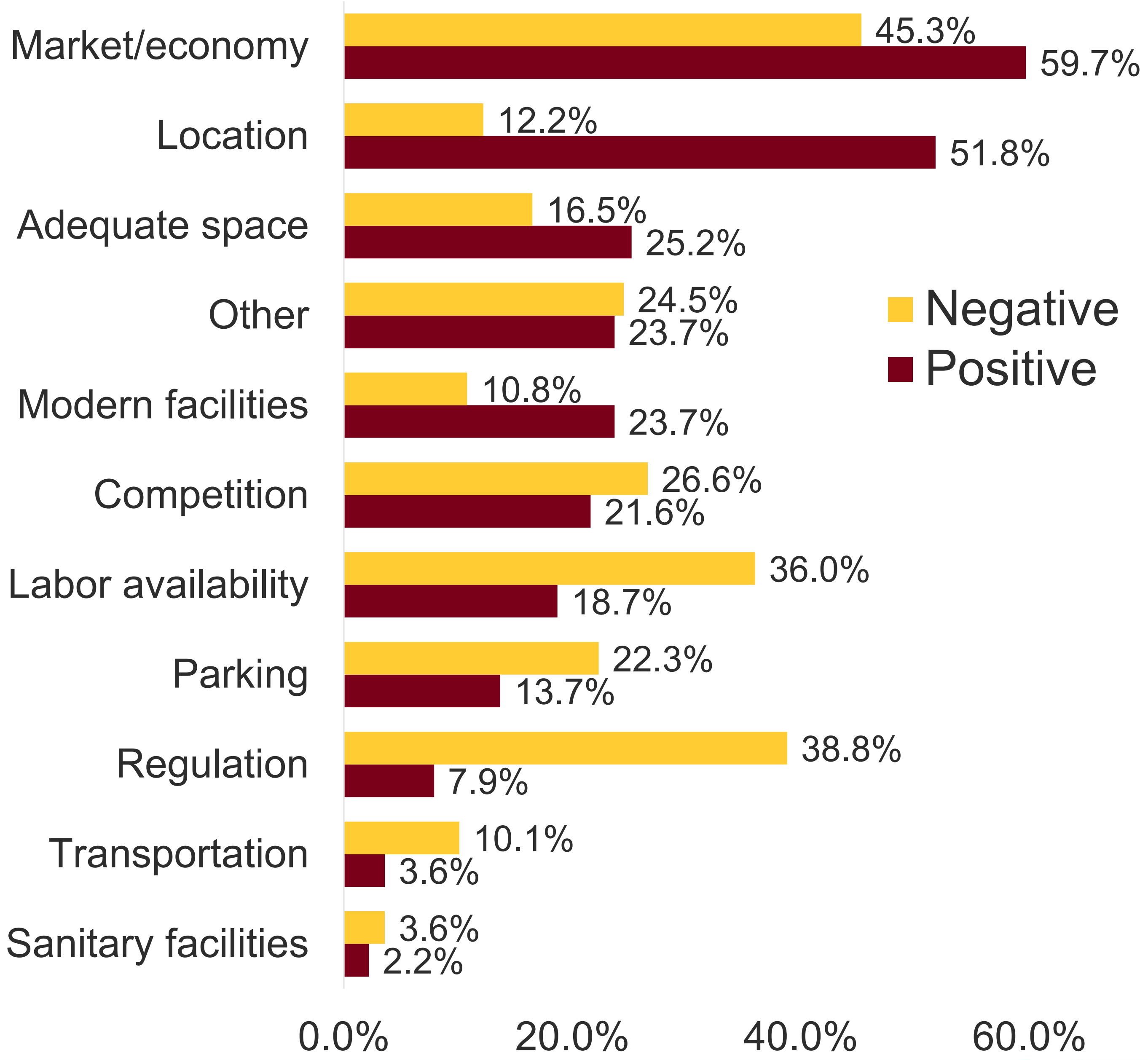


How did 2025 business compare to 2024?



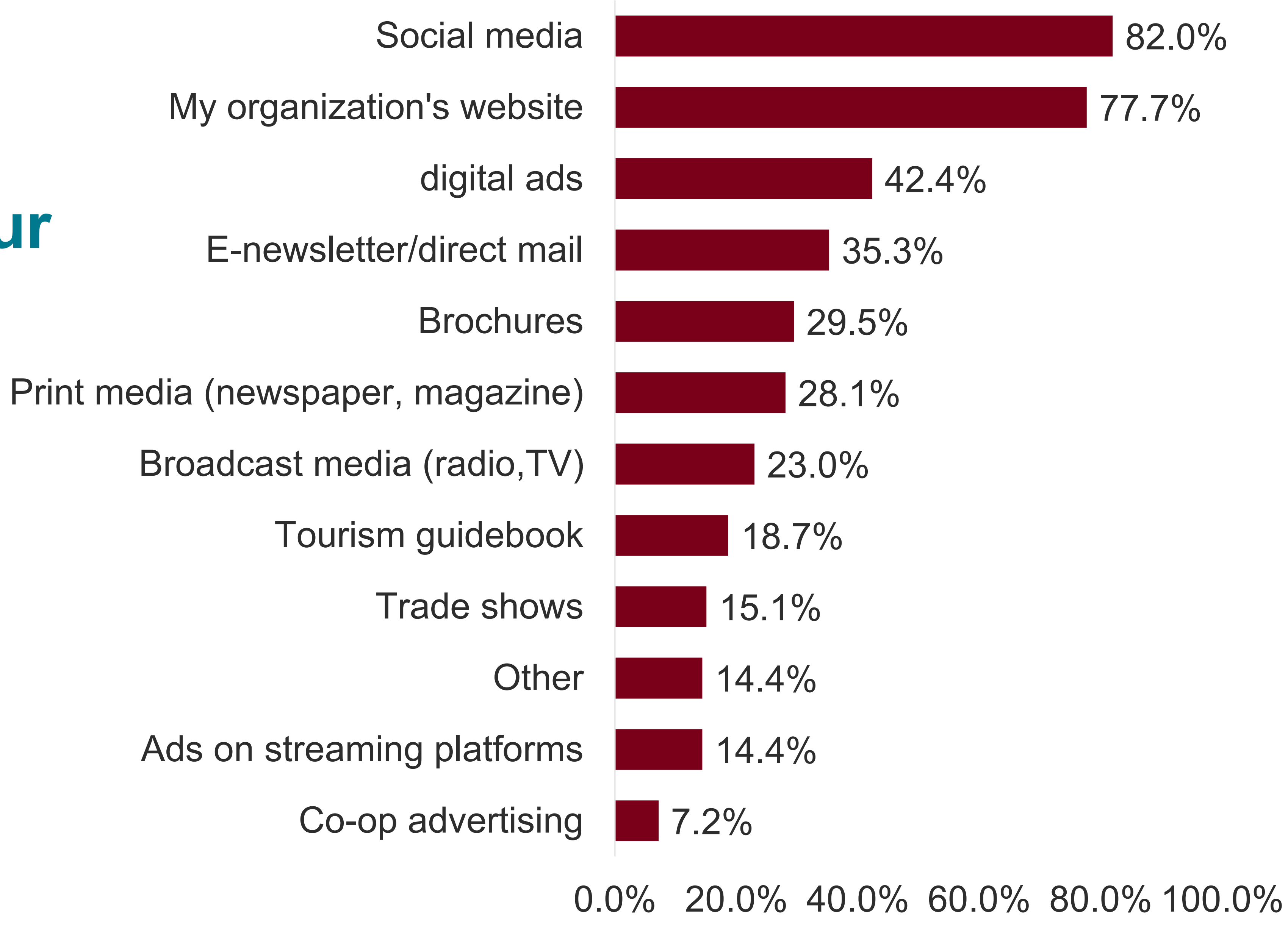
Positive vs. negative factors

- Market/economy: Most frequently identified as positive AND negative!
- Location, adequate space, modern facilities: More frequently identified as positive
- Regulation, labor availability, parking, transportation: More frequently identified as negative



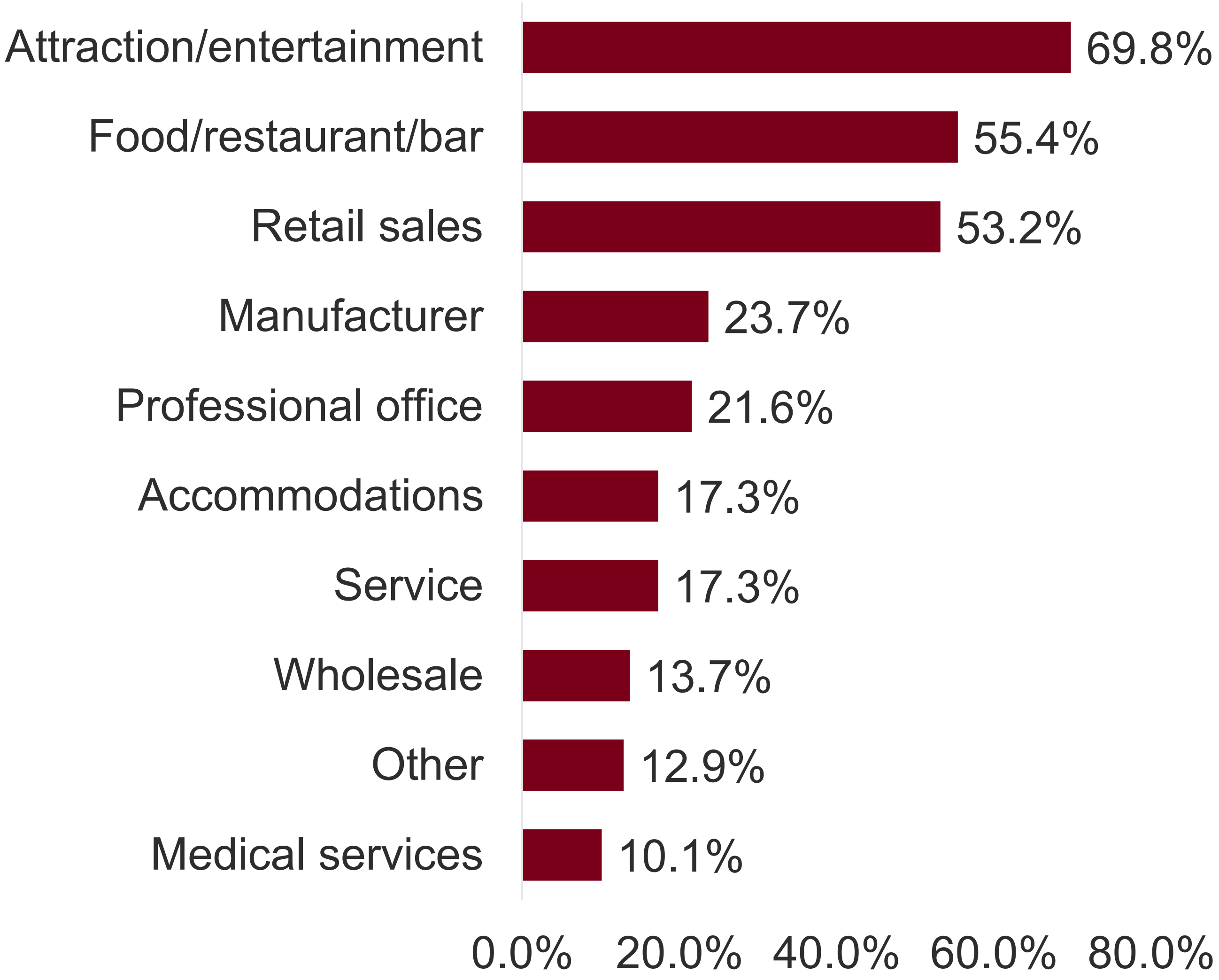
What types(s) of advertising do you use to promote your organization?

- Most used advertising methods: social media (82%) and organization website (77.7%).
- 42.4% use digital ads and 35.3% use e-newsletter / direct mail.



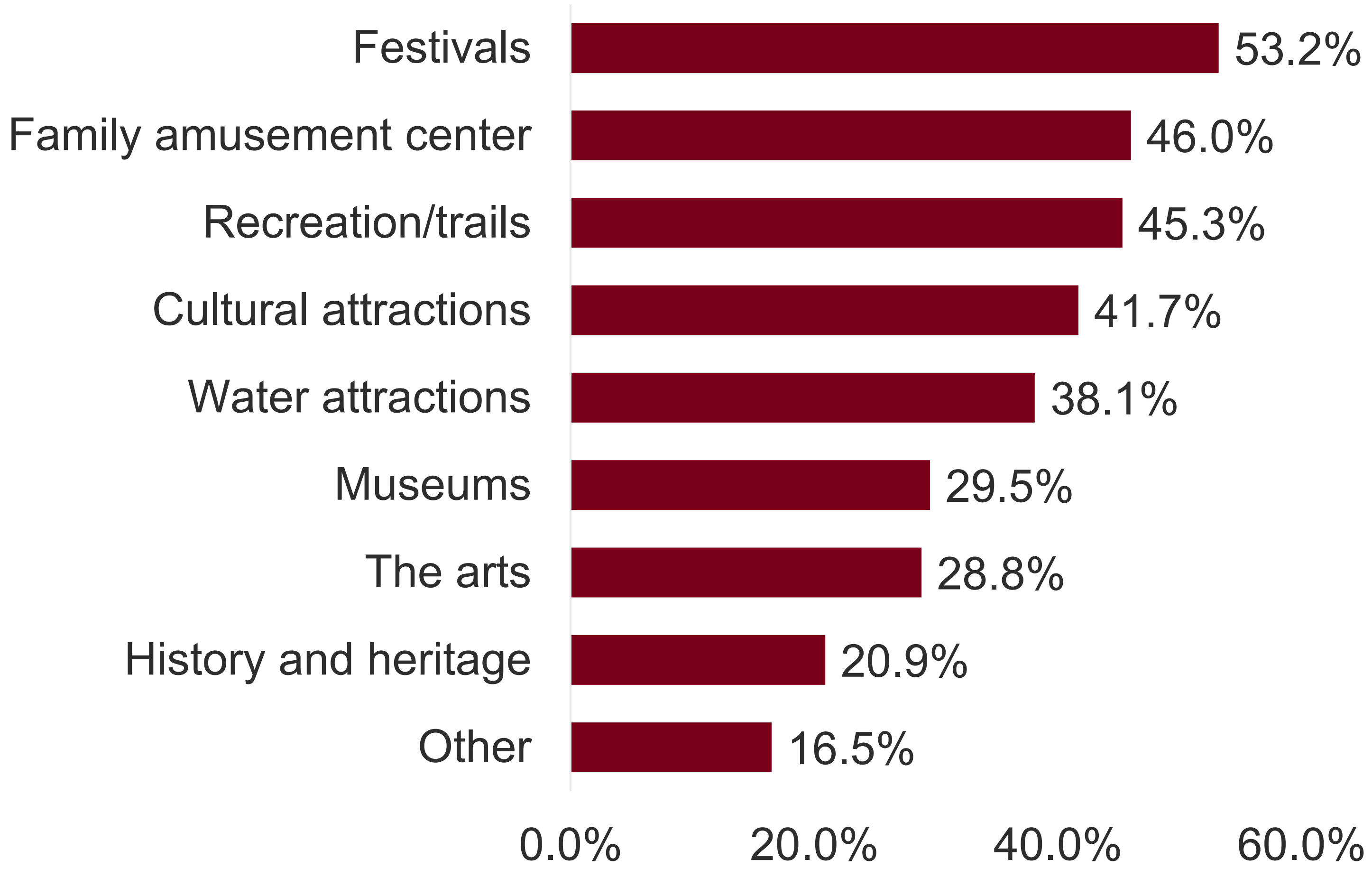
What type(s) of new businesses would you like to see in the area?

- 70%: attraction / entertainment
- More than half: food / restaurant / bar (55.4%) and retail sales (53.2%).
- 17.3%: Accommodations and Service.



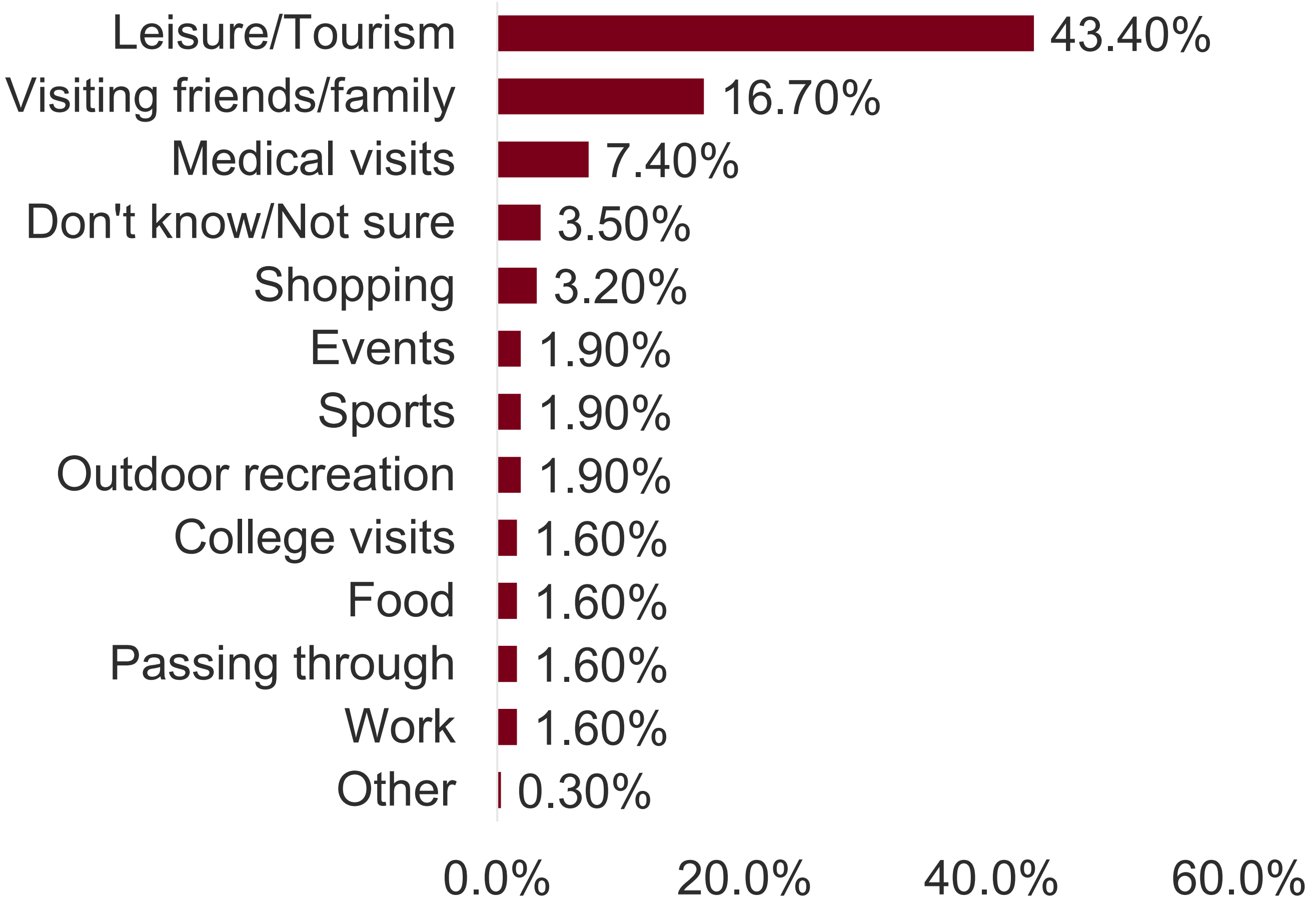
What type(s) of attractions should be developed to attract non-medical visitors to Rochester?

- 53.2%: Festivals.
- 46% family amusement center, 45.3% recreation / trails, and 41.7% cultural attractions.
- 38.1%: Water attractions.
- 29.5% museums and 28.8% the arts.



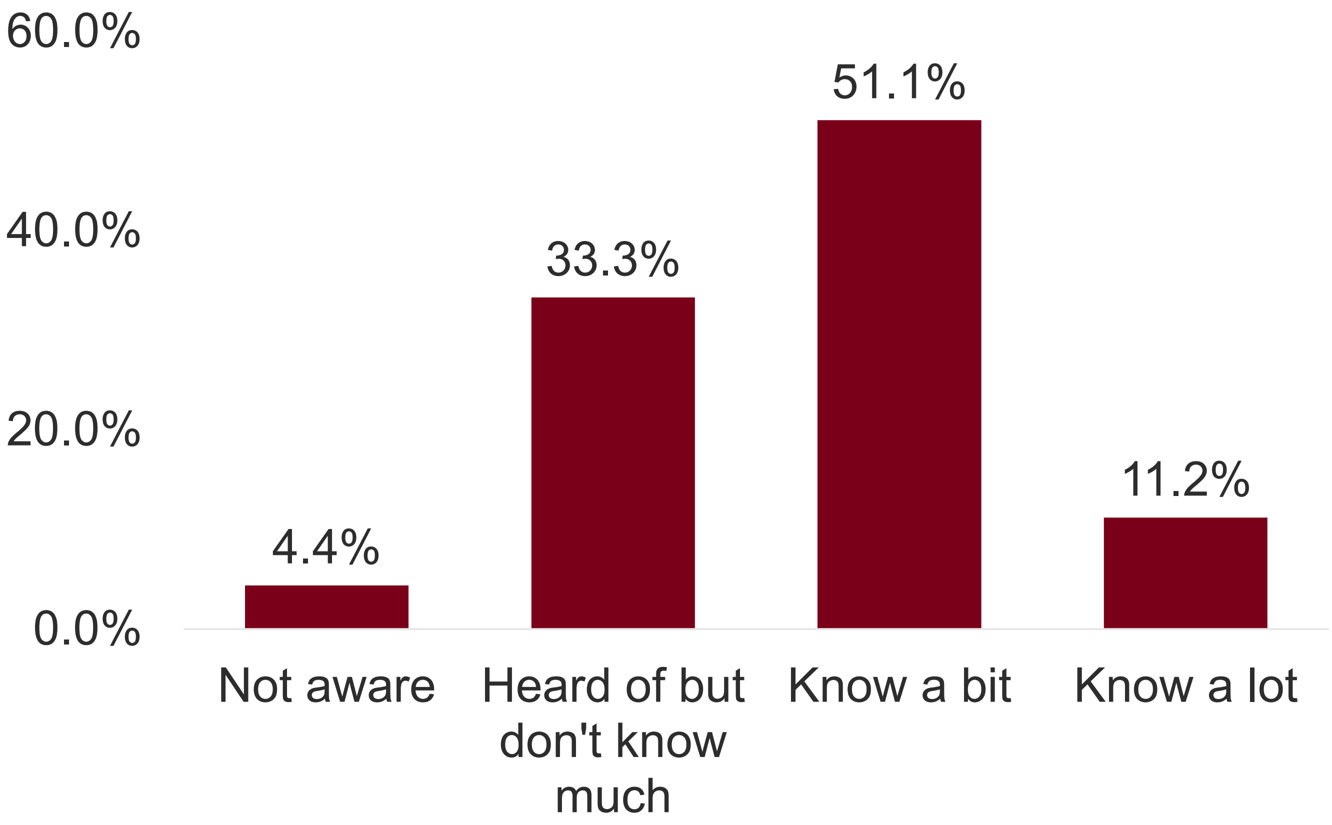
Non-visitor survey: Key findings

Among those who may or do plan to visit Rochester in the next 12 months: What will be the primary trip purpose?



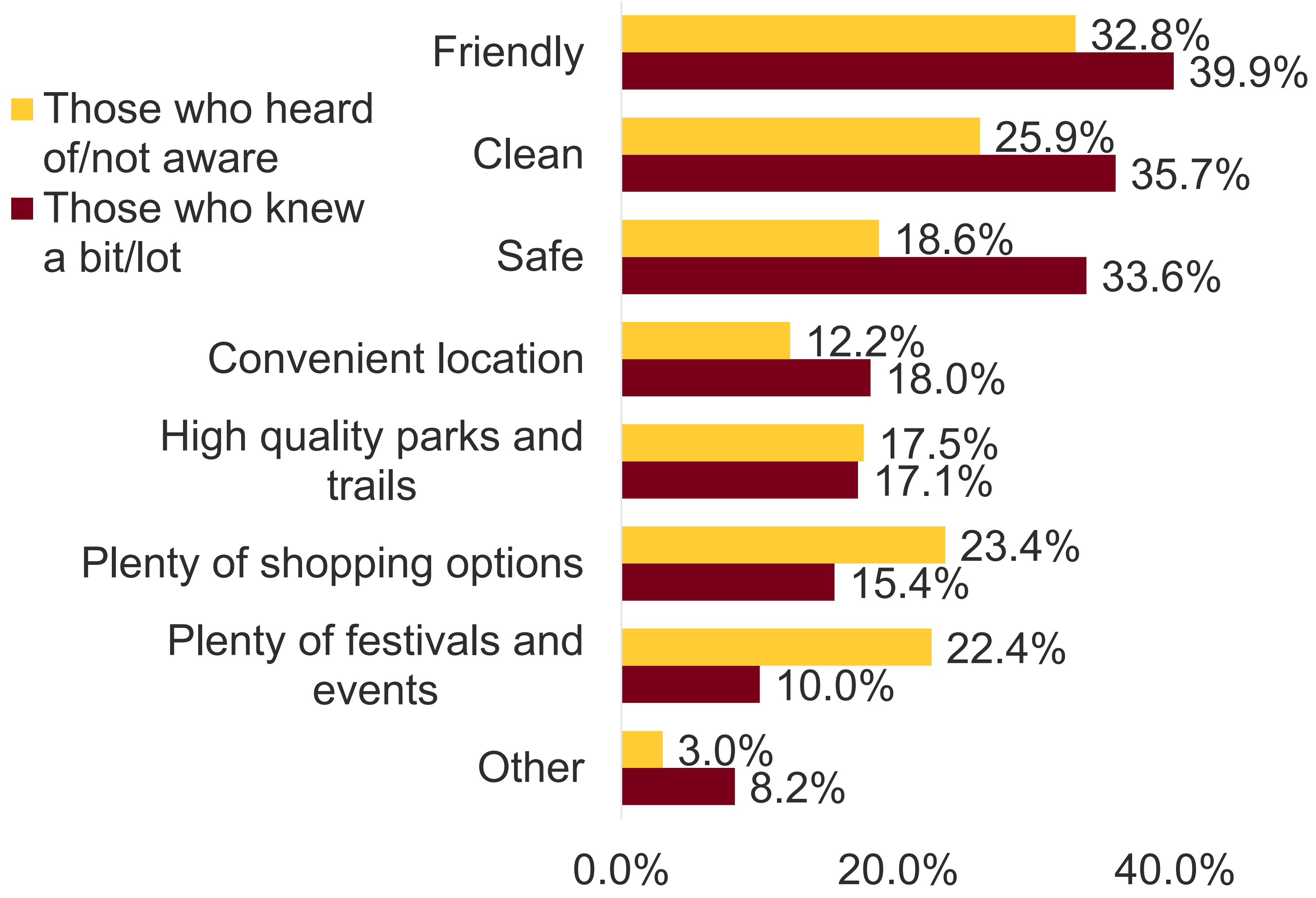
- Top trip purpose: Leisure / tourism (43.4%)
- 16.7% visiting friends / Family
- 7.4% medical visits

Are you aware of the City of Rochester, MN?



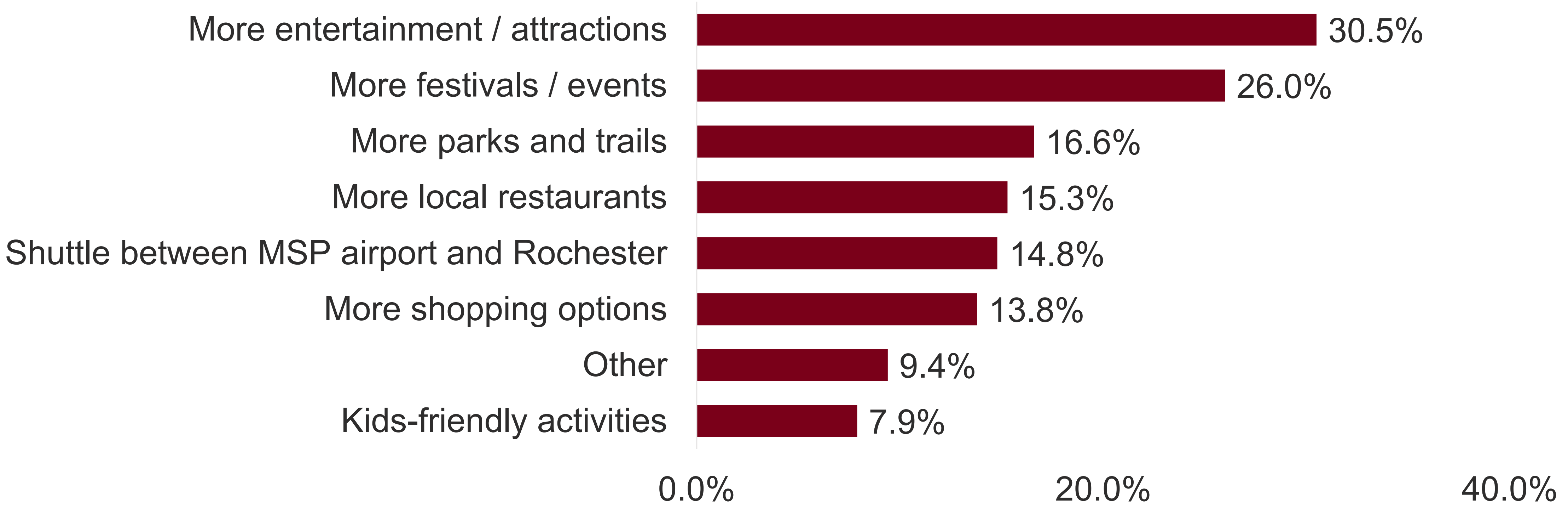
- Half (51.1%) knew a bit.
- One-third (33.3%) heard of Rochester but don't know much.
- 11.2% knew a lot.
- 4.4% weren't aware of Rochester.

Impression of Rochester: Those who are aware vs. those with minimal awareness but watched a promotional video



- Video worked well highlighting plenty of festivals/events, plenty of shopping, and high-quality parks & trails.
- Those who are aware of Rochester more strongly identified with: friendly, clean, safe, and convenient location.
- Top two for both groups: friendly, clean.

What would entice you to visit Rochester, MN?

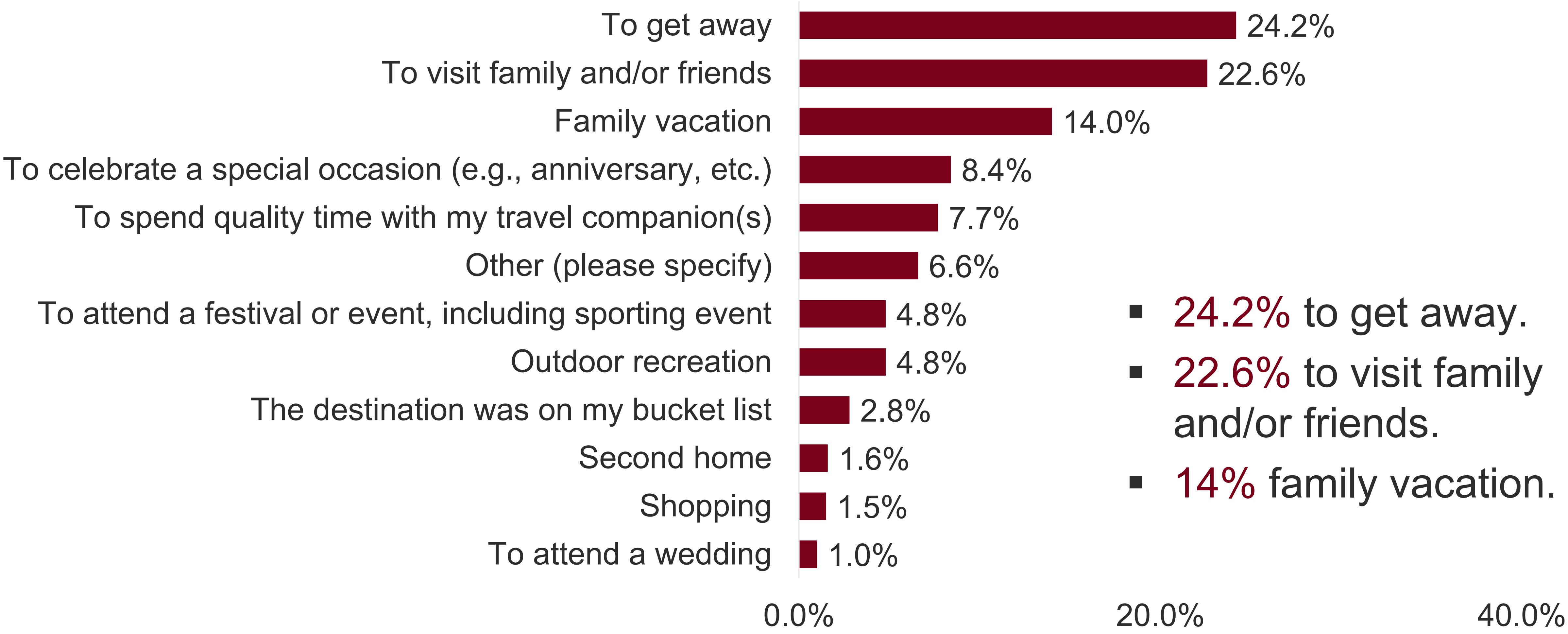


- Top two: more entertainment/attractions (30.5%), more festivals/events (26%).

Non-visitors

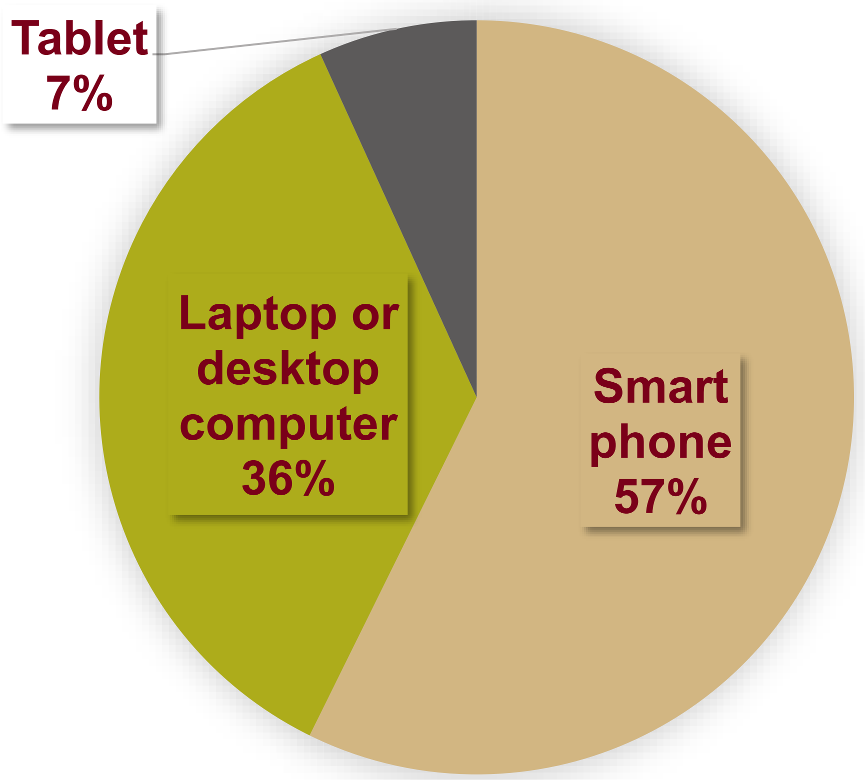
Domestic Leisure Travel Characteristics

What was your primary motivation for taking the most recent domestic leisure trip?



- 24.2% to get away.
- 22.6% to visit family and/or friends.
- 14% family vacation.

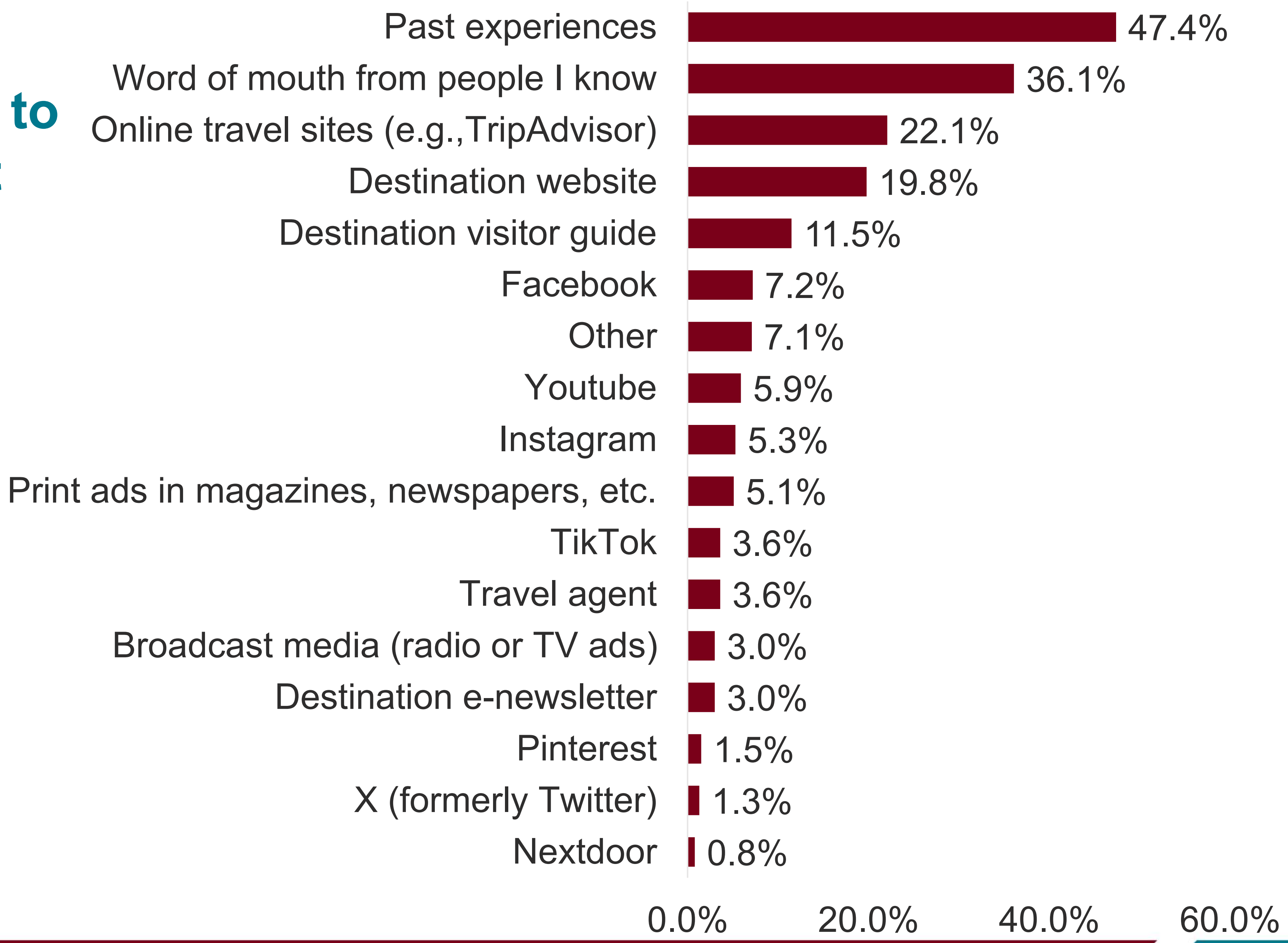
Which one of the following devices did you primarily use to plan your most recent domestic leisure trip?



- 57% primarily used a smartphone.
- 36% primarily used a laptop or desktop computer.
- 7% primarily used a tablet.

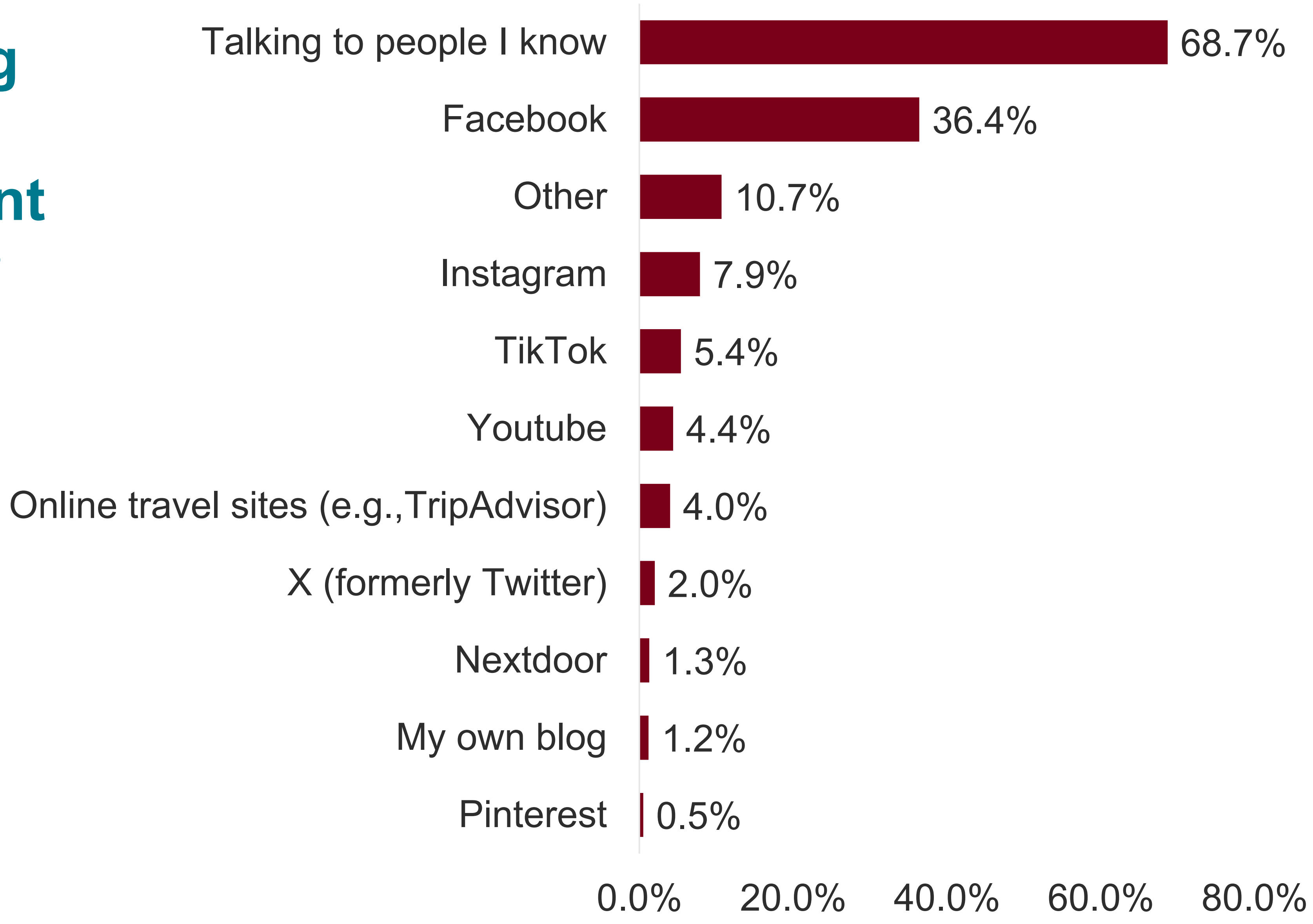
What information source(s) did you use to plan your most recent domestic leisure trip?

- 47.4% relied on their own past experiences.
- 36.1% identified word of mouth from people they knew.
- Most frequently used online sources: Online travel sites (22.1%) & destination website (19.8%).
- Most frequently used social media: Facebook (7.2%) & Youtube (5.9%).



Which of the following did you use to share about your most recent domestic leisure trip?

- 68.7%: “Talk to people I know.”
- 36.4% would use Facebook.
- No other method used by more than 8% of respondents.



Insights & major themes

United demand for entertainment and recreation

- A prominent theme across all three groups is a strong desire for more attractions, entertainment, festivals, and (outdoor) recreational opportunities.

	Attraction	Entertainment	Festival	(Outdoor) recreation
Business	70%	46% (family amusement center)	53.2%	45.3%
Residents	42%	44.8%	--	43.4%
Non-visitor	30.5%		26%	16.6% (parks & trails)

State of business in the city

- 82% businesses better or the same in 2025 than 2024.
- **Positive & negative factors** impacting organizations:

Market/economy is a double-edged sword.

Preserve **positive** factors: Location, adequate space, modern facilities

Need to address **negative** factors: Regulation, labor availability, parking, transportation

Optimize existing assets

- Critical to optimize using and highlighting existing assets:
  - Parks, trails, outdoor spaces
  - Restaurants / dining
  - Clean, safe, well-maintained community + friendly people
  - Convenient size; easy to navigate

Make strategic investments that meet residents' and businesses' needs

- Cautious about “build it and they will come”.
- What residents and businesses said Rochester needs:
  - More entertainment and things to do
  - Arts, culture, events
  - Downtown improvement / revitalization
  - Youth activities and family spaces
  - Restaurants and food variety
  - Transportation, infrastructure
  - Shopping / retail expansion
  - Affordability concerns

Balancing growth with resident & business concerns

Traffic:

Residents concerned about traffic congestion.

Businesses concerned about parking and transportation.

Residents' Concerns:

Want a more vibrant economy, but concerned about:

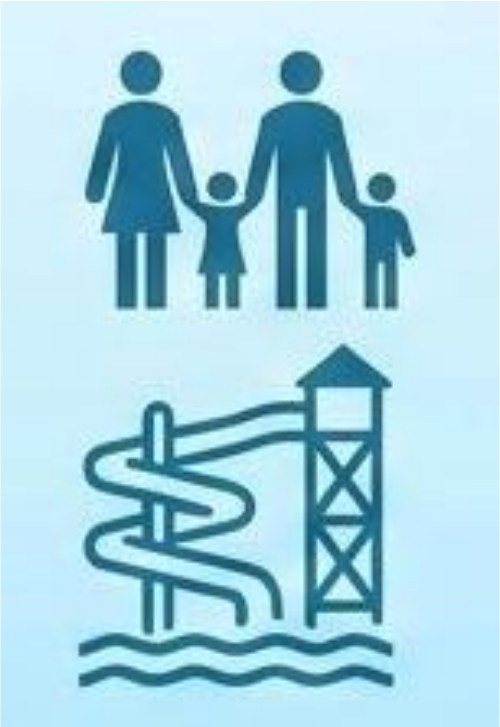
- Higher taxes
- Increased housing costs

Labor Availability:

A top negative factor for businesses.

Balancing growth with resident & business concerns

- **Most desirable for residents and businesses**: New community assets that enhance quality of life, such as family entertainment, expanded recreation, more outdoor experiences.



Positive brand image as a start

- “Friendly” and “clean” identified as Rochester’s top traits by non-visitors across awareness levels.

Let’s connect the dots here!

- “To get away” is a top motivation for non-visitors to take a domestic leisure trip.

Beyond a medical-only identity

- **Currently**:
  - 58% of non-visitors who are aware of Rochester know it as the “home of Mayo Clinic”.
  - Residents perceive an over-reliance on Mayo Clinic, a lack of identity, and “nothing stands out”.
  - Businesses see a higher contribution to their gross sales revenue from medical tourism than non-medical.
- **Potential**:
  - Non-visitors who may or do plan to visit Rochester in the next 12 months: 43.4% cited leisure/tourism as their primary trip purpose vs. 7.4% cited medical visits.

The power of word-of-mouth and marketing

Delivering a high-quality experience to visitors in market is the best form of marketing.

Still important: Advertising needs to align with how visitors plan and share about their leisure trips.

Use user-generated content whenever possible.

Digital content needs to be mobile friendly.

Thank you!

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