Creative Evaluation + Niche Analysis

October 2019

EXPLORE MINNESOTA

insights
Strategic Marketing and Research

Background

- Explore Minnesota Tourism (EMT) conducts paid marketing efforts aimed at influencing leisure travel to the state. In 2019, EMT is partnering with Strategic Marketing and Research Insights (SMARInsights) to provide estimates of the volume and value of travel influenced by paid advertising. ROI research will be conducted later this year to measure that level of influenced travel.
- Traditionally, EMT has advertised regionally, in nearby states and designated market areas (DMA)/census metropolitan areas (CMA) from which travelers typically drive to Minnesota for leisure trips. Due to proximity and prior paid advertising being focused here, these traditional markets are familiar with Minnesota and with what it offers as a leisure destination. EMT continues to advertise in these traditional markets.
- However, in 2019, EMT has adopted a new strategy, serving ads not only to its traditional markets, but also running ads nationally among "niche" audiences. Niche audiences include consumers who are likely to hike, bike, golf, and/or engage in arts and culture activities on their leisure trips.
- This new targeting strategy comes alongside a new creative agency, new creative, and a new media agency. So there are a number of moving parts in this campaign. This research helps identify the campaign's target audience and evaluates the strength of the creative among these travelers, as well as travelers in the traditional geographic markets where familiarity and past visitation are much higher.

Traditional markets (nearby states and DMA/CMAs that have received EMT messaging before)		
Minnesota	Nebraska	Omaha
Wisconsin	Winnipeg	Kansas City
Iowa	Chicago	St. Joseph
North Dakota	Rockford	Davenport
South Dakota	Joplin-Pittsburg	Topeka
Colorado	Peoria-Bloomington	

Research Objectives

- The current wave of research was conducted as a preliminary step to upcoming ROI research, to enable EMT to:
  - Beta test a screening method to identify niche travelers
    - The goal is to measure the campaign among the same audience at which it was aimed in the media buy. To gain an understanding of the parameters EMT and the media agency used to identify and serve ads to the niche audience, SMARInsights devised a series of screening questions to identify the same audience among our research respondents. The first part of the analysis reported here compares the demographic and behavioral responses in our data to the audience targeted by the ads. This will determine our screening criteria going forward with the ROI research.
  - Provide a creative evaluation of the campaign by medium with comparison to SMARInsights' benchmarks, which provide EMT and its creative partners with a report card on the strength of the advertising relative to other destination ad campaigns.
    - A key benefit of doing this before the ROI wave is that it provides feedback in time to make any necessary tweaks before the coming season's ad buy must be finalized. Another benefit is that it keeps the ROI wave questionnaire shorter (since the creative evaluation questions can be truncated or omitted) leading to a better respondent experience and more reliable data.
    - Evaluating the ads by medium allows us to compare not only to SMARInsights benchmarks but also across media and executions to identify which appeal to what travelers, and which are more effective at various points in the decision funnel – building interest, motivating research into the destination, etc.

Methodology

- SMARInsights conducted 801 surveys in September 2019.
- Travelers in traditional markets – nearby states and cities where EMT has advertised in the past – were screened to ensure they were leisure travelers over age 21 and leisure travel decision makers for their households.
- Travelers in national markets were additionally screened to ensure their leisure travel activities qualified them as a broadly defined "niche" audience as shown at right. Travelers in national markets were excluded if they did not participate in at least one of these activities often or always on their leisure trips.
- This very broad definition of the niche audience was used with the understanding that additional analysis would be conducted to determine the best fit definition of the niche audience. And as the following report details, SMARInsights recommends a somewhat more narrow definition of the national niche audience going forward.
- After data collection, data was cleaned and coded for analysis.

Surveys completed	
Traditional	300
National niche	501

Activities used to define "niche" travelers
Hiking
Mountain biking/fat biking
Paved trail/road biking
Playing golf
Going to art museums
Going to history museums or historical sites
Attending plays/theatre/performing arts
Learning about local culture
Purchasing locally made products
Attending live music events
Attending parades or cultural festivals

Niche Analysis

Explore Minnesota Creative Evaluation + Niche Analysis, October 2019

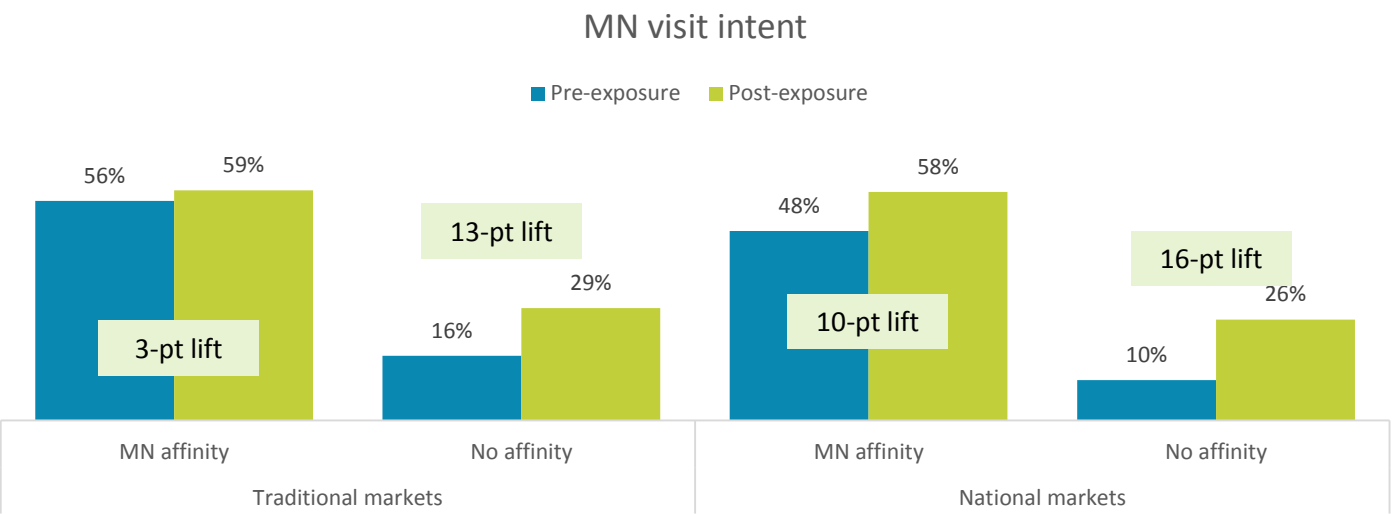
Defining the national niche audience

- Surveys were conducted in national markets to identify niche travelers using an array of activities that people often or always participate in on their leisure trips. Efforts to identify these niche travelers were made in order to ensure that we are able to identify in the research the same or similar population to whom the media agency is targeting the ads. So the initial screening criteria were designed to cast a fairly broad net, anticipating that we would then use data analysis to determine the best way to identify this niche audience.
- Activities that define the hiking, biking, and golf niches are very straightforward. There was some challenge with the arts and culture activities, however, as some of the activities initially used as screeners were too broad (attending live music performances and buying locally made goods, for instance). Factor analysis showed that the arts and culture activities shown in the table at right are the ones that held together best.
- Further, travelers were required to participate in at least one of these activities "always" on their leisure trips, in order to qualify as an arts and culture niche traveler.

Niche	Activity/ies
Hiking	Hiking
Biking	Mountain biking/fat biking
	Paved trail/road biking
Golf	Playing golf
Arts + Culture	Going to art museums
	Going to history museums or historical sites
	Attending plays/theatre/performing arts
	Learning about local culture
	Attending parades or cultural festivals

Niche travelers don’t need a Minnesota affinity to be impacted by the ads

- Respondents were also asked whether they had an affinity for the state through having lived there before, followed a Minnesota sports team, had friends and family in the state, etc. Affinity was used to refine niche audiences, to more efficiently direct niche ads to consumers regarded as most likely to be impacted by those ads to visit Minnesota.
- However, the data show that the level of interest in visiting the state among those with a Minnesota affinity is so high that the ads have little opportunity to grow interest.
- Conversely, while interest in a Minnesota visit among those without a connection to the state is low prior to exposure to the creative, the ads have a significantly higher impact on visit interest among this audience.
- These affinity-related findings call into question the practice of using affinity as a screener for niche advertising. However, the subsequent ROI study will help address this question, allowing a better determination of the impact of affinity on actual visitation, i.e., as opposed to the impact of affinity on intent to travel.



Audience image of Minnesota

- Traditional markets, which are closer to (and include) Minnesota and have been served EMT ads before, are very positive about the state's leisure product, as shown here. Outdoor activities, scenery, and related assets receive excellent ratings among travelers in traditional markets.
- Among the national niche travelers, ratings are also very high. In fact, even before ad exposure, national niche travelers already rate the state as high as nearby travelers for its stunning scenery, relaxing atmosphere, and charming small towns.
- Interestingly, national niche views of the state's culture and heritage are higher than traditional markets' views.
- On the remaining attributes, national niche views of Minnesota are directionally in line with traditional markets' views, but somewhat lower. This indicates that there is some awareness of the state's leisure product and a generally favorable image.

How much do you agree that each of these statements describe Minnesota? Mean rating on scale where 1=does not describe at all, 5=describes extremely well	**Traditional markets**	**National niche**
Has great outdoor activities	4.2	4.1
Has stunning scenery	4.1	4.1
Has great options for families with children	4.1	3.9
Has great parks and trails	4.1	4.0
Has four amazing seasons	4.0	3.9
Is a place I feel welcome	4.0	3.9
Offers a relaxing atmosphere	4.0	4.0
Has first-rate fishing/hunting	4.0	3.8
Has charming small towns	4.0	4.0
Offers a good vacation value for the money	4.0	3.9
Has great opportunities for adult vacations	3.9	3.8
Is a fun and exciting place to visit	3.9	3.7
Is a place for adventure	3.9	3.8
Has exciting spectator sporting events	3.7	3.6
Has exciting urban entertainment	3.7	3.6
Has fascinating culture and heritage	3.6	3.7

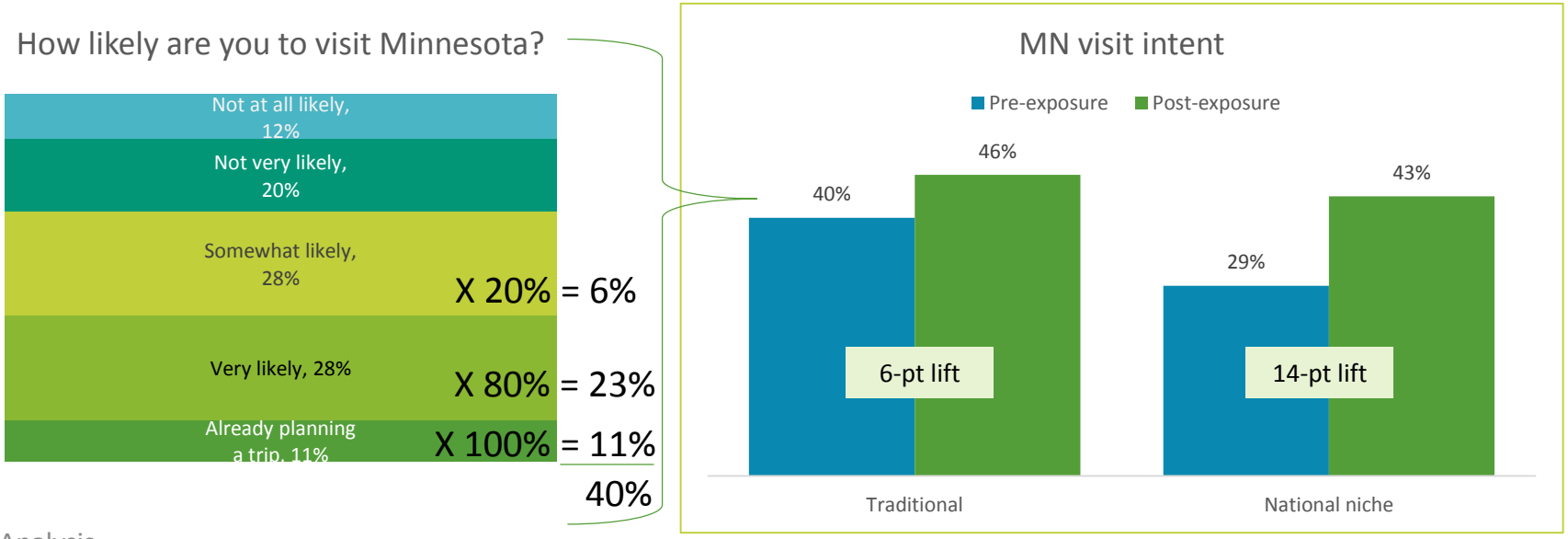
Respondent demographics

The demographics of the individual niche groups reinforce much of the media agency's targeting, particularly in terms of relative age and household income.

		Traditional markets	National markets, any niche	Individual Niche			
				Golf	Biking	Arts + Culture	Hiking
Age	18-34	23%	32%	47%	32%	32%	32%
	35-54	43%	37%	38%	45%	36%	42%
	55+	34%	31%	15%	24%	32%	27%
HH	Married	69%	61%	66%	69%	62%	66%
	Divorced/separated	7%	10%	9%	9%	8%	8%
	Widowed	4%	5%	1%	5%	6%	4%
	Single/never married	20%	23%	25%	17%	24%	23%
	Kids in HH	55%	59%	71%	66%	57%	59%
Education	High school or less	13%	15%	8%	14%	14%	14%
	Some college	24%	20%	11%	18%	16%	20%
	College graduate	46%	48%	59%	52%	51%	50%
	Post-graduate degree	17%	17%	23%	16%	19%	16%
Income	Less than $50,000	29%	30%	19%	25%	29%	28%
	$50,000 - $74,999	24%	24%	24%	23%	21%	23%
	$75,000 - $99,999	18%	22%	20%	19%	22%	24%
	$100,000 - $124,999	11%	10%	13%	13%	11%	10%
	$125,000 - $149,999	8%	8%	11%	9%	10%	9%
	$150,000 or more	9%	6%	15%	10%	7%	8%
Ethnicity	Caucasian/White	87%	77%	78%	74%	73%	83%
	African-American/Black	2%	7%	3%	7%	8%	4%
	Latino/Hispanic	4%	7%	9%	8%	7%	6%
	Asian	6%	10%	14%	13%	11%	10%
	American Indian	0%	1%	0%	1%	0%	1%

Impact of the ads on visit intent

- As a way to gauge the impact of the ads on interest in visiting Minnesota, a pre-/post-test was used. Travelers were asked at the outset how likely they were to visit Minnesota. Then, after exposure to the ads, they were asked, "Now, having seen these advertisements, how likely are you to visit Minnesota for a leisure trip in the next year?"'
- The difference between the two measures is attributable to the ads.
- In the traditional markets, the baseline (pre-exposure) is quite high; 40% of travelers express some level of intent to visit or travel within Minnesota. Here, the ads generate an additional 6-point lift in visit intent.
- Among the national niche audience, baseline visit intent is considerably lower. But the ads boost visit intent to 43% – which is nearly as high as in the traditional markets. Among the national niche, the ads' impact is twice what it is in the closer-in markets.
- This result reinforces the wisdom of the strategy to target both audiences, reinforcing interest among traditional markets and generating new visitation among those farther away.

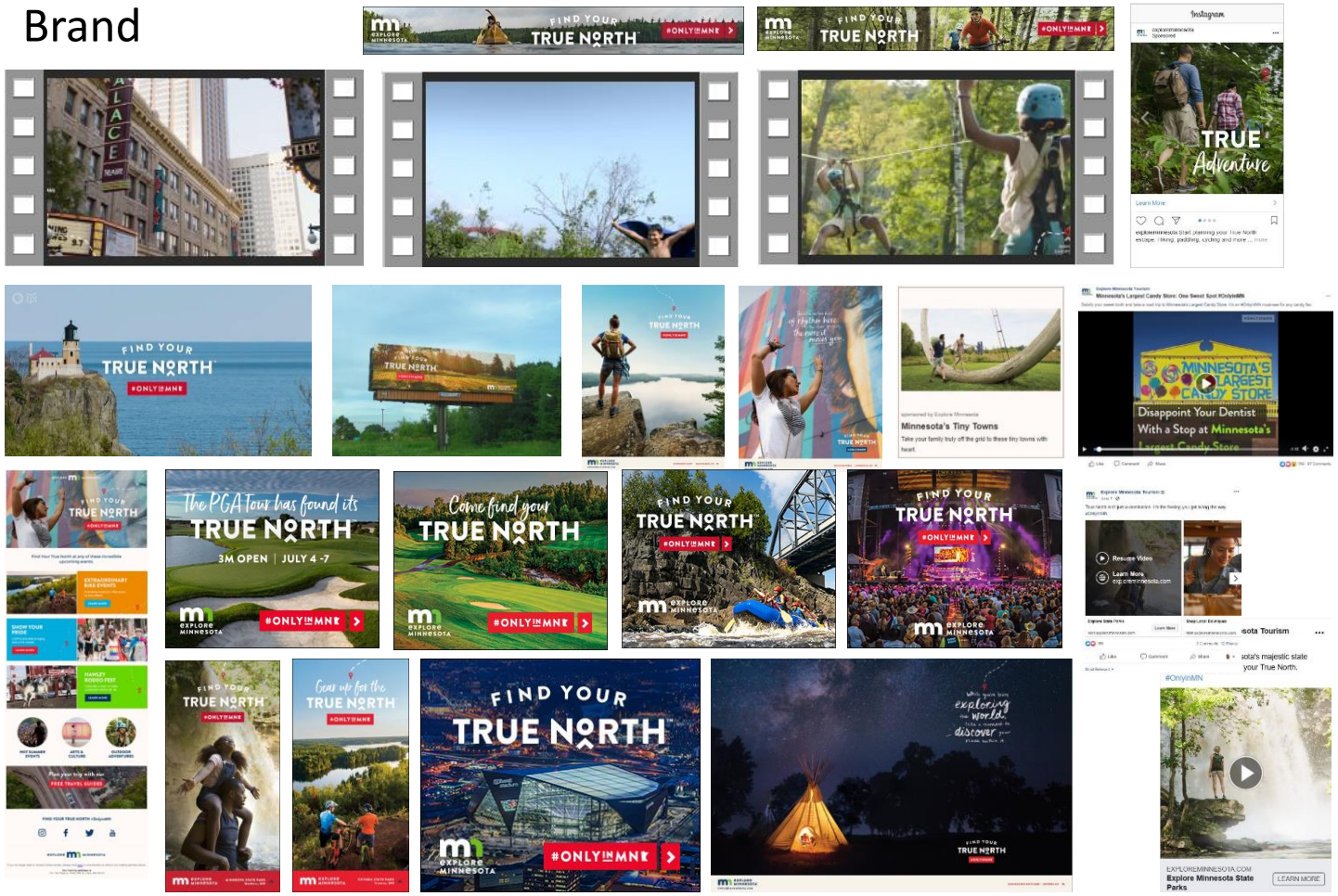


Creative Evaluation

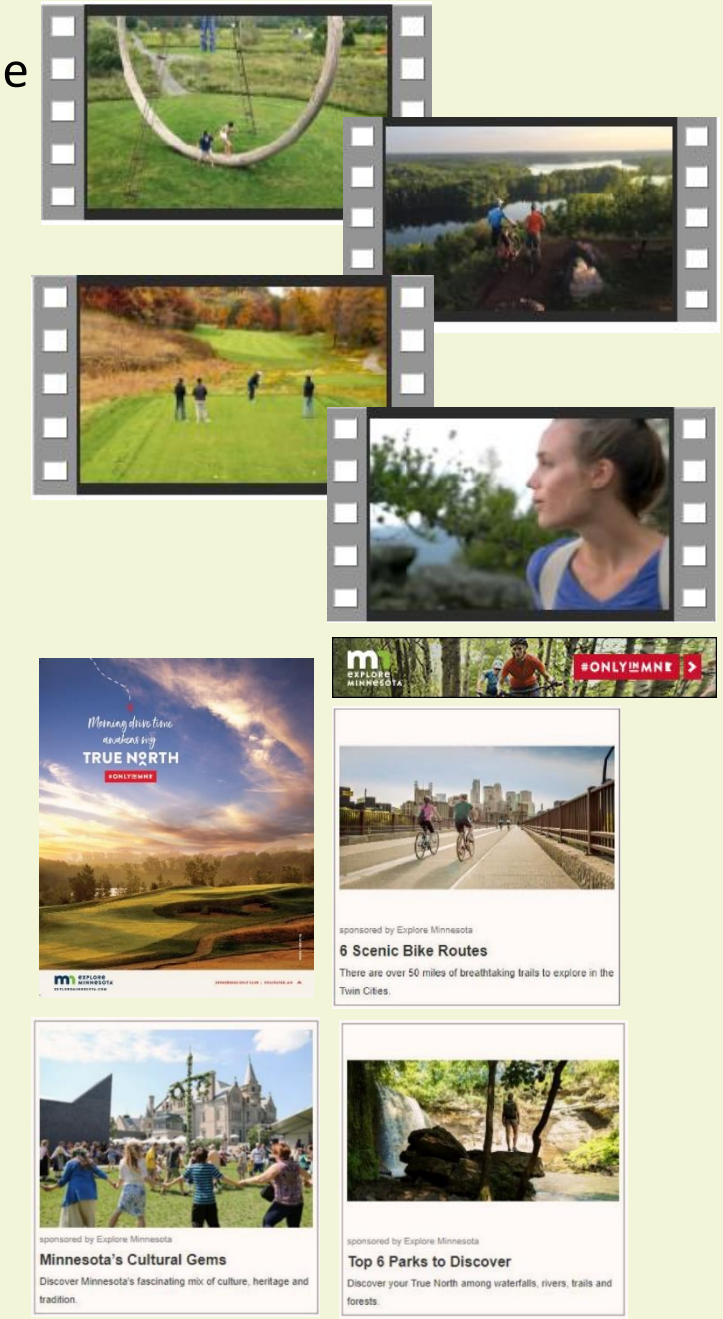
Explore Minnesota Creative Evaluation + Niche Analysis, October 2019

Ads tested

Brand



Niche



Creative Evaluation

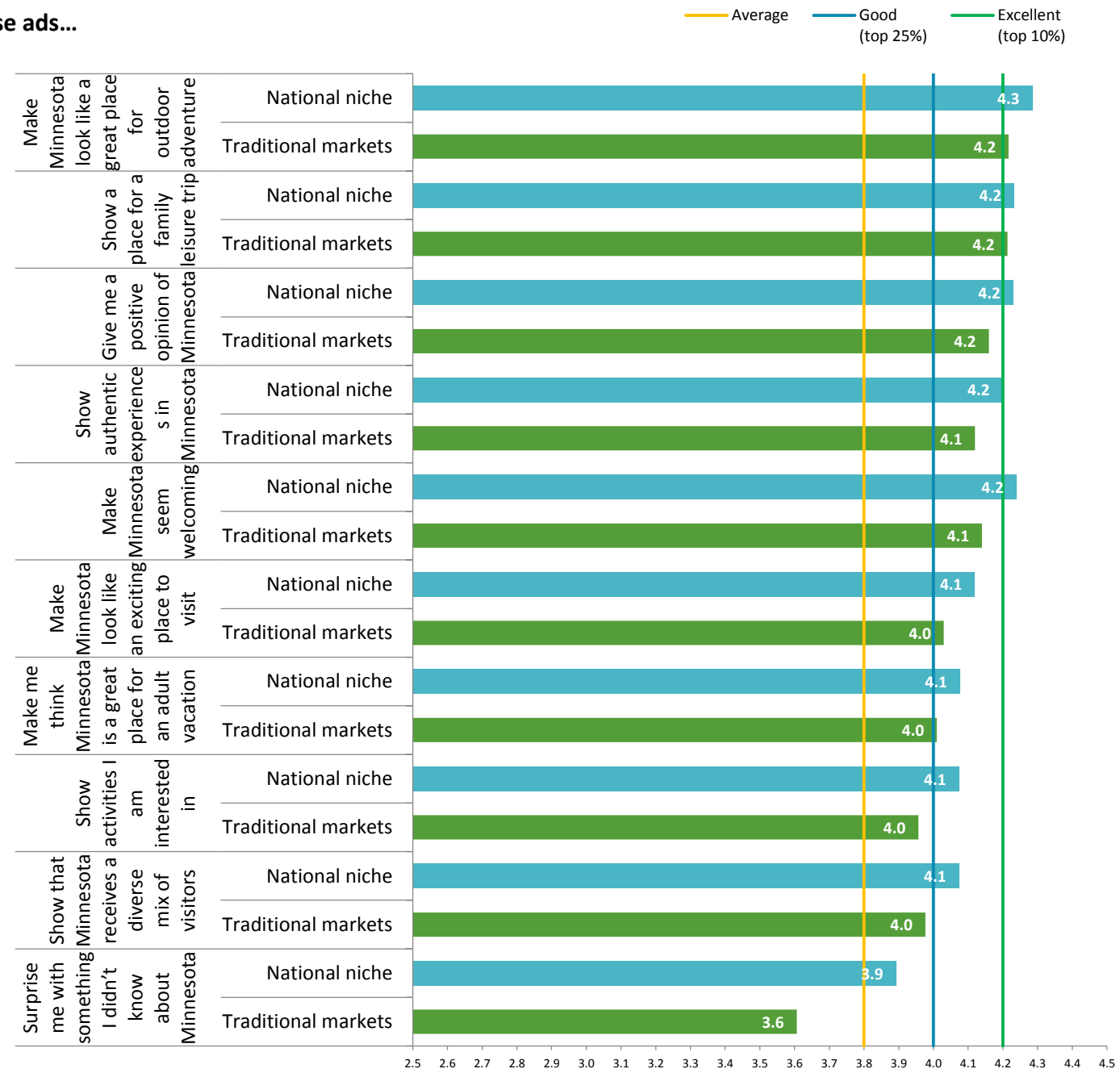
- Messaging is a vital part of the effectiveness of an advertising campaign. The ads need to effectively communicate desired messages and generate interest in order to drive travel.
- There are two types of attributes related to advertising creative:
  - **Communication attributes** gauge how well the ads communicate particular messages about the destination
  - **Impact attributes** determine how well the ads encourage the consumer to take an action
- Ratings for these *communication* and *impact* attributes have different benchmarks because it is harder to generate an action from a consumer than it is to communicate a desired message.

SMARInsights benchmarks	Communication	Impact
Excellent (top 10%)	4.2	4.0
Good (top 25%0	4.0	3.9
Average	3.8	3.7

- To gauge how well EMT's ads communicate desired messaging, SMARInsights showed travelers the ads and asked them to evaluate each ad. After showing all ads in a particular medium – video, print, digital, out of home (OOH) – respondents then rated the medium as a whole, using a 5-point scale where 5 = "strongly agree" and 1 = "strongly disagree."
- Through the evaluation of hundreds of campaigns, SMARInsights has developed benchmarks for destination marketing creative. The benchmarks apply across media and help underscore which media tend to be the most impactful on communicating messaging and impacting behaviors. The goal for DMOs is to be in the top 25% of all campaigns evaluated. The benchmarks are noted in each of the creative rating charts that follow.

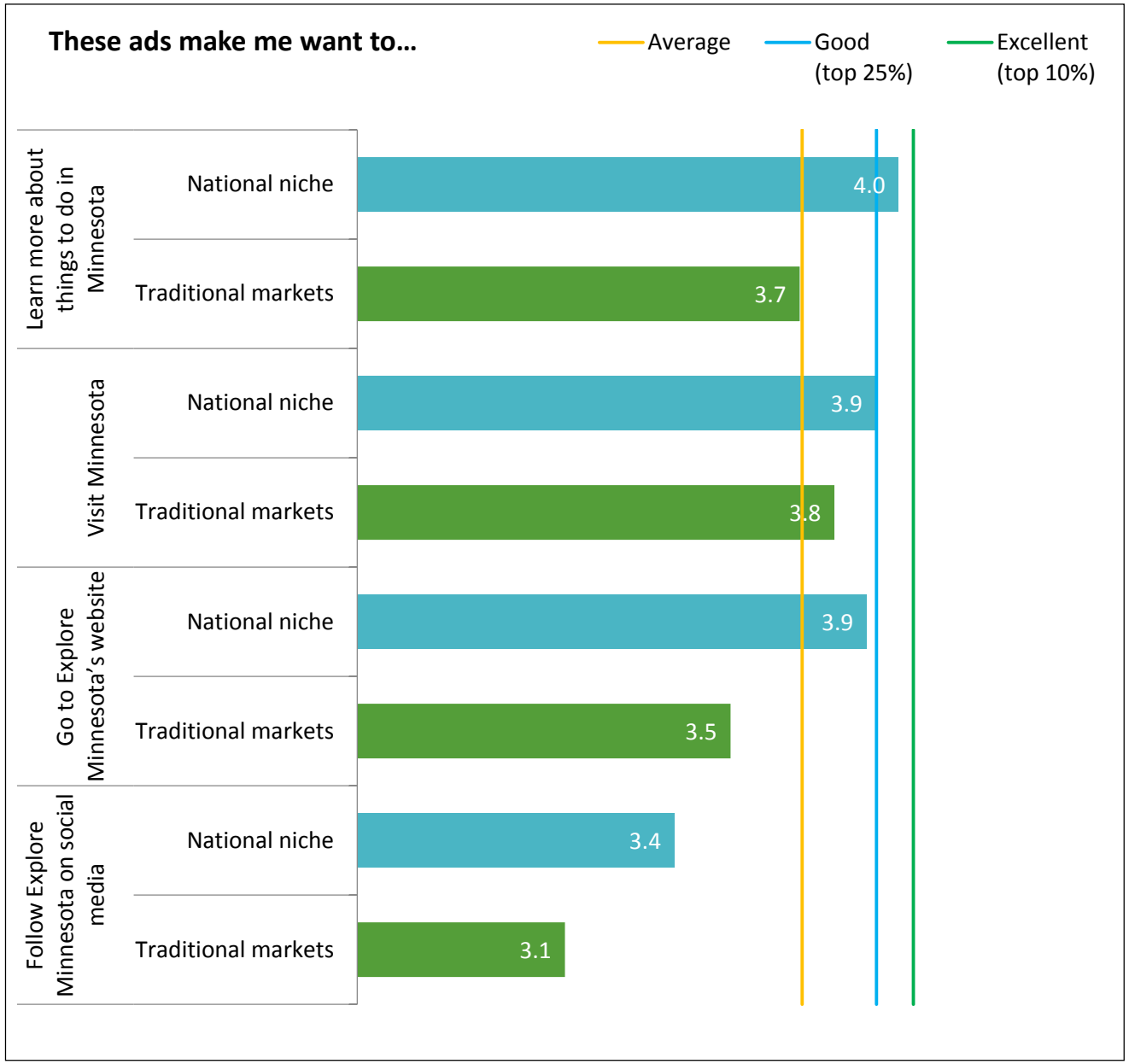
Brand TV/videos: communication ratings

- These ads receive very strong ratings.
- As a group, the brand videos rate in the top 10% of ads SMARInsights has tested for showing the state's outdoor and family assets.
- The ads rate higher among the national niche audience on all attributes and are also in the top 10% among niche for communicating positive experiences, welcoming, and authentic experiences. In fact, all the ratings among niche travelers are above average.
- The only attribute that gets a below average rating is traditional markets saying the ads did not surprise them with new information. This makes sense – this audience is closer, more familiar, and knows what Minnesota has to offer.



Brand TV/videos: impact ratings

- As we saw with communication ratings, the national niche rates the ads higher than the traditional markets do.
- The ads are in the top 25% among national niche travelers for making consumers want to learn more about things to do in Minnesota, and for making them want to visit the state.
- The brand videos rate above average for making national niche consumers want to visit the website, and lower for making them want to follow the state on social media. It makes sense that these ratings are low, since the ads are not focused on driving these actions specifically.
- Among traditional market consumers, the brand videos' strongest rating is for making people want to visit the state. This is a positive result, since this is the main job of the advertising. Lower impact ratings among closer, more familiar travelers indicate that these brand videos are perhaps less effective than a more tactical execution might be, giving people a reason to visit at a particular time, for a particular event.



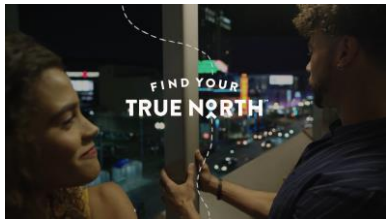
Individual brand TV/video ads

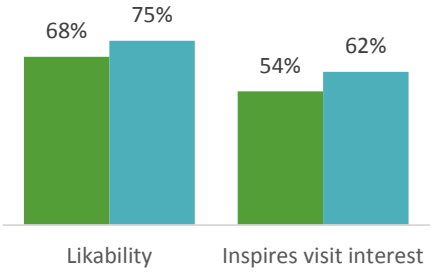
Traditional markets

National niche

Likability: Which one of these statements best describes your feelings about this ad? 1=I don't like it at all and 5=I like it very much.
Inspires visit interest: How much do you agree that this ad makes you more interested in visiting Minnesota? 1=strongly disagree and 5=strongly agree.
Shown are responses of 4 and 5.
Average results from recent destination marketing campaigns are Likability: 63% and Inspires visit interest: 50%

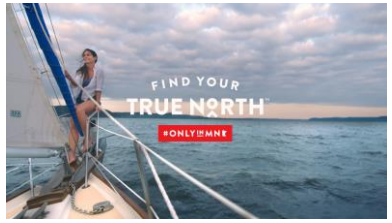
Feeling Free - Metro

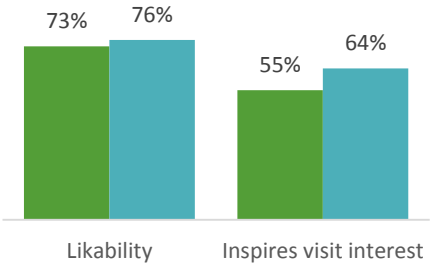




- "I didn't realize Minnesota has such a rich arts and music scene."
- "There are things to do for people who don't like the outdoors."
- "Cultural activities are more prevalent than I thought."

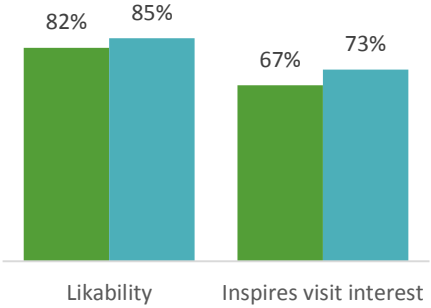
Discover New Passions





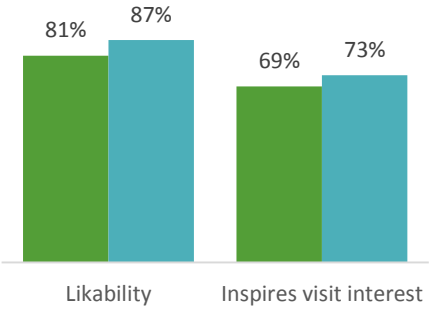
- "A great couple's vacation enjoying bed and breakfasts and exploring the outdoors together."
- "It highlights a variety of activities along with location names, making them more accessible to look up and plan for."

Family Connections



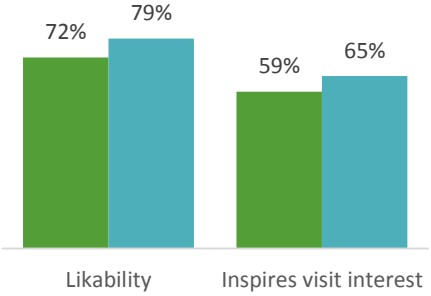
- "I like how Minnesota offers a wide range of activities that the whole family can enjoy together."
- "This ad is important for families. It shows what there is to offer for families with children."

New Things



- "I love that it shows some things I haven't done before."
- "I like how Minnesota offers a great sense of adventure with everlasting family memories."
- "Diverse, looks safe and I am someone who will be enjoying this with my family."

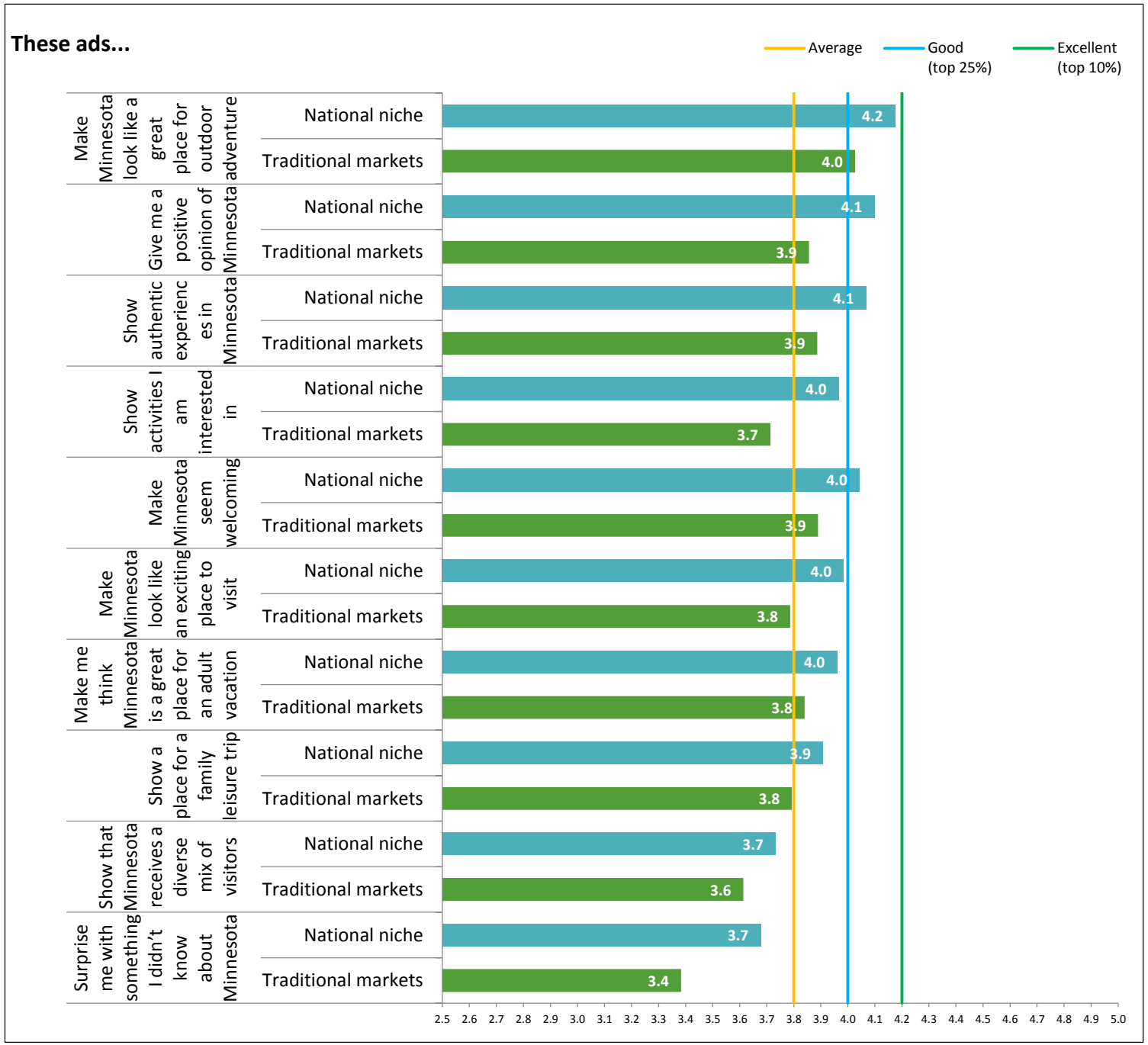
Split Rock Light House



- "I've never heard of this community but it looks like a fun place to visit."
- "Oh my gosh this is my kind of vacation. I love to explore, be outside and visit historical areas with activity."

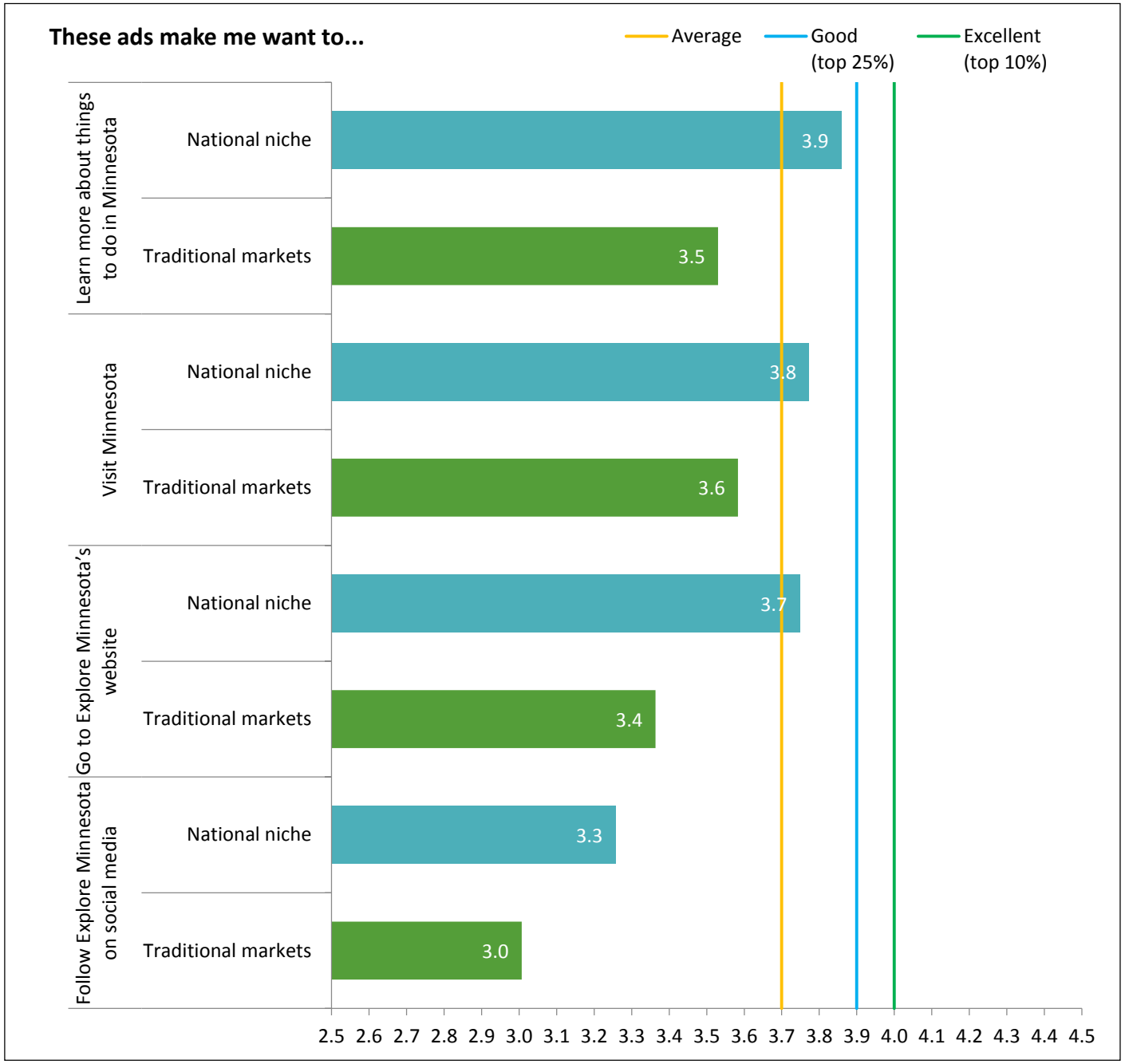
Brand print ads: communication ratings

- The brand print ads also receive strong ratings.
- Generally, consumers rate video ads higher than static executions; video is able to tell a more complete story. These print ads, however, are rated nearly as high as the video, which is a very positive result.
- Again, national niche rates the ads higher, and some of that is likely due to this being new information to travelers in farther markets. This is again reinforced by low ratings among traditional markets for “These ads surprise me with something I didn’t know about Minnesota.”



Brand print ads: impact ratings

- Again, national niche rates these ads higher than traditional markets, just as we saw for video.
- And again, among traditional markets, the highest rating for the print ads is for making people want to visit the state.
- Regarding the low ratings for making people want to follow Explore Minnesota on social media, the ads do not display an invitation to do so. They do show the URL, which may explain more positive response to interest in going to the website. Including social media logos with EMT's handle could be a way to boost this action.



Individual brand print ads

Traditional markets

National niche

Likability: Which one of these statements best describes your feelings about this ad? 1=I don't like it at all and 5=I like it very much.
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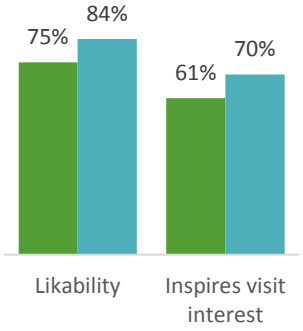
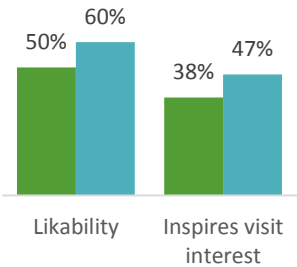
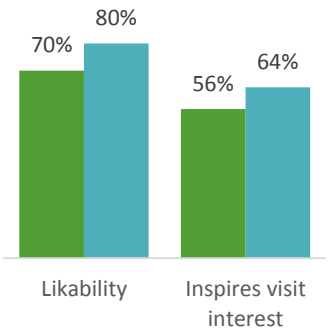


- "It shows what its like to be outdoors in Minnesota."
- "It shows a beautiful place to go hiking and sight seeing."
- "This looks like an amazing place to hike. Really like the photo, very dramatic."
- "Wide, opened natural surrounding. Clear skies with a breathtaking view."



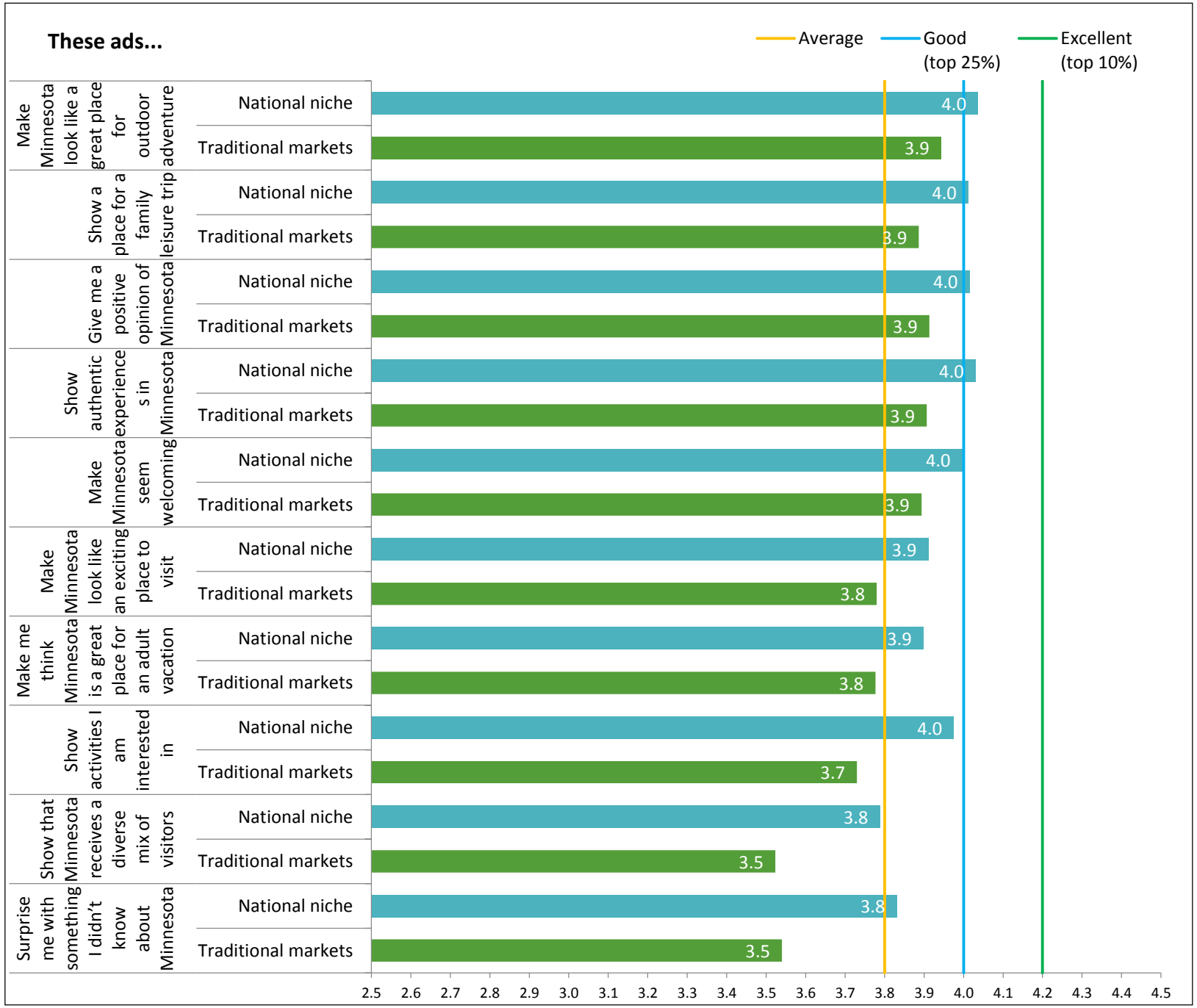
- "I know personally, I become alive and excited when I travel to Minnesota."
- "The ad displays freedom of expression and freedom of movement."
- "It shows that Minnesota cares about art."
- "Love Bob Dylan and his Minnesota connection."
- "Music culture must be really big in Minnesota."



- "Minnesota lets people explore a sense of everything to find what they truly enjoy."
- "Rural and not urban. Fresh air, fresh sky, fresh foliage. Everything is unpolluted and natural."
- "Beautiful ad, makes you want to camp."
- "I love the concept it makes me feel more connected to the universe."

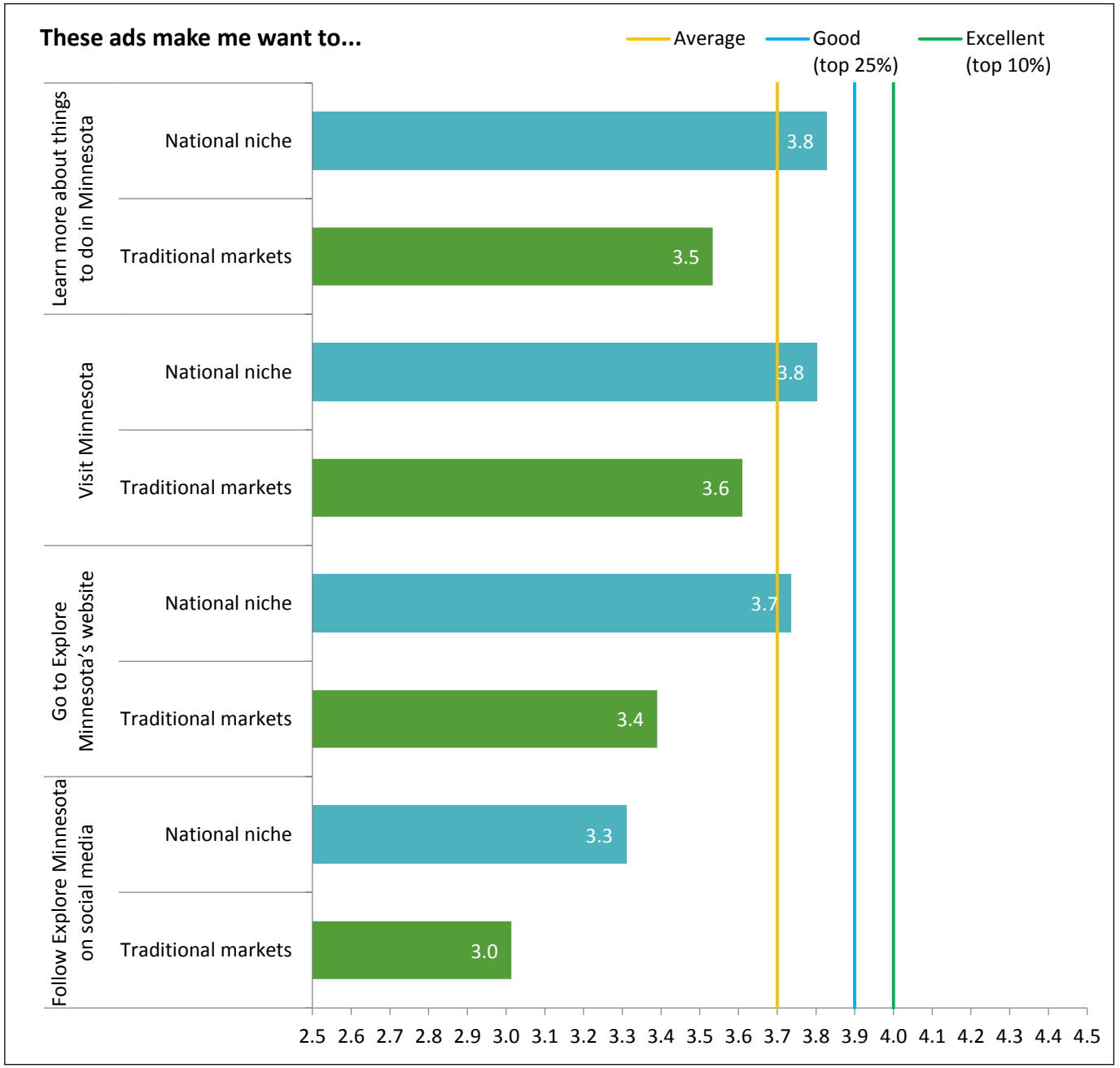
Brand social: communication ratings

- While lower than ratings for video and print, social ratings among the national niche for outdoor, family, positive opinion of the state, authentic experiences, and welcoming are in the top 25% of ads SMARInsights has tested.
- Ratings among traditional markets are directionally similar, with the highest and above-average ratings for the same attributes.
- We often see much lower ratings for social ads due to the narrow appeal of individual executions; many destinations use social for tactical messaging. However, the four social executions tested here show a great deal of leisure product with broad brand messaging. This helps explain the high ratings, particularly among the national niche.



Brand social: impact ratings

- National niche consumers rate the social executions above average for generating interest in learning more, visiting, and going to the website.
- Traditional market travelers, who may feel as though they already know the Minnesota leisure product, give these ads lower ratings, in line with ratings for the print executions.
- Again, among more familiar consumers, the upper-funnel brand messaging may be less immediately impactful. It is still important to maintain this type of messaging, but among these markets, layering in more tactical event-based ads can also be effective.



Individual brand social ads

Traditional markets

National niche

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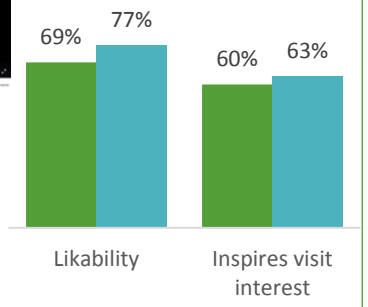
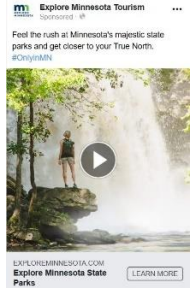
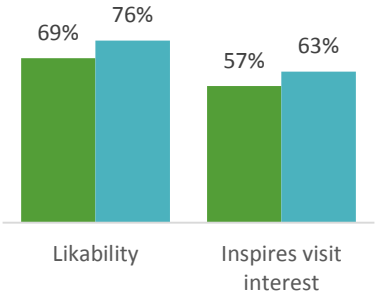
Candy Store



- "The store looks exciting and fun. There is something for everyone."
- "A fun activity for the whole family."
- "I would do almost anything for candy."
- "Very unique place to visit and experience."
- "Superhero room with Marvel and Doctor Who phone box."

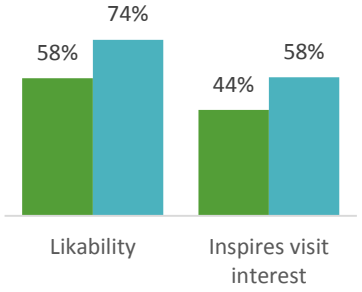


Cinemagraph

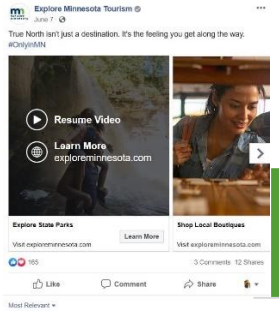


- "Minnesota State parks look clean and beautiful."
- "It offered a true sense of adventure and togetherness."
- "The waterfall looks awesome."
- "It shows a great place for hiking in beautiful scenery."
- "The Minnesota state parks are very memorable places to visit."

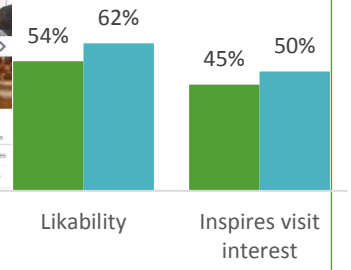
Carousel



- "I like the different places you can find info about MN."
- "It shows that it is a good place to go if you like camping and hiking."
- "Minnesota offers true sense of exhilaration with hiking, cycling and paddling."
- "Makes me want to start looking into a Minnesota vacation."



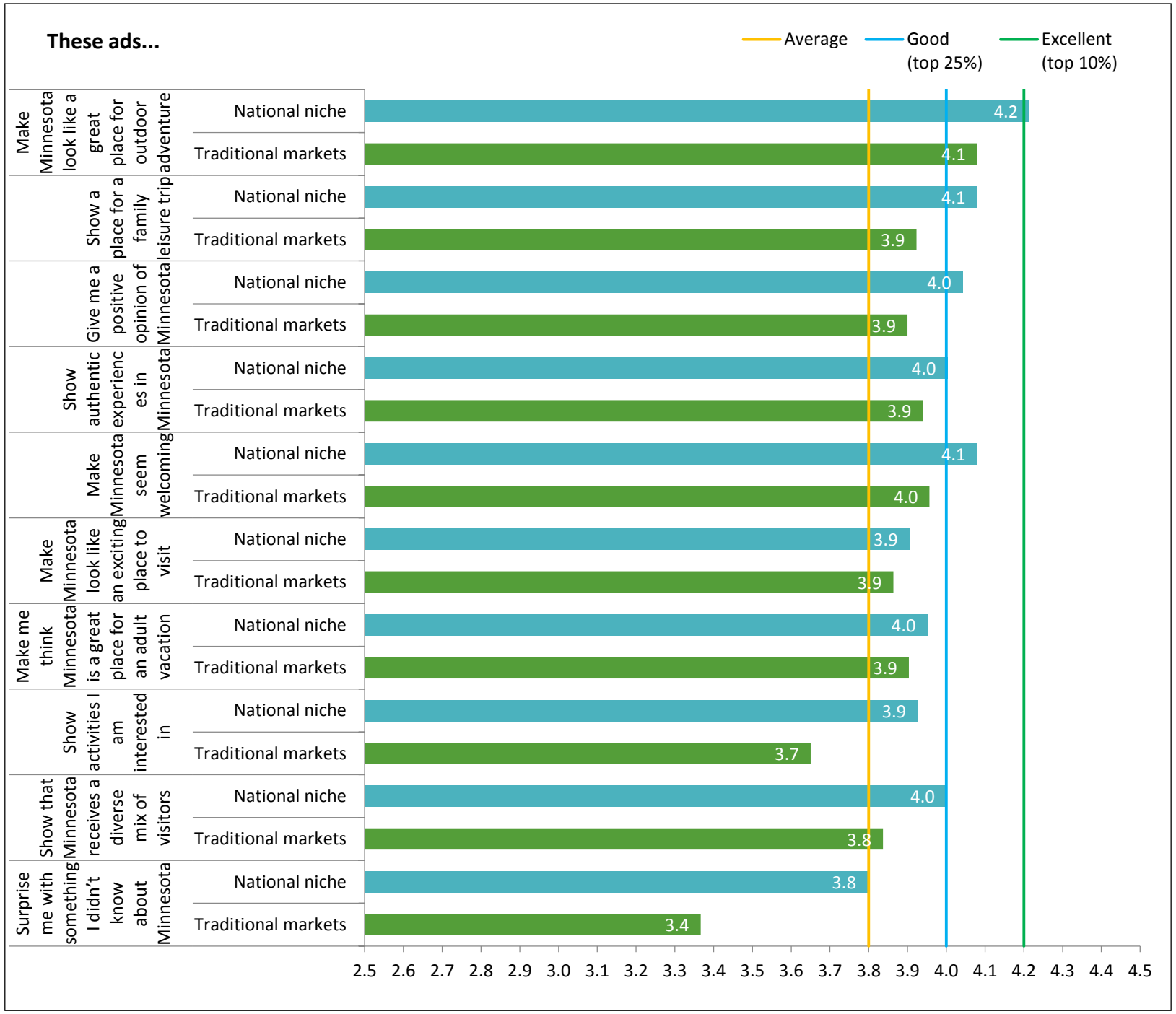
Carousel 2



- "Minnesota offers a true sense of dining experience."
- "Many things to experience."
- "I love how it shows everything you can do."
- "It shows diverse activities in MN."
- "Minnesota has everything I could hope to see, do and eat. Looks like a perfect holiday destination."

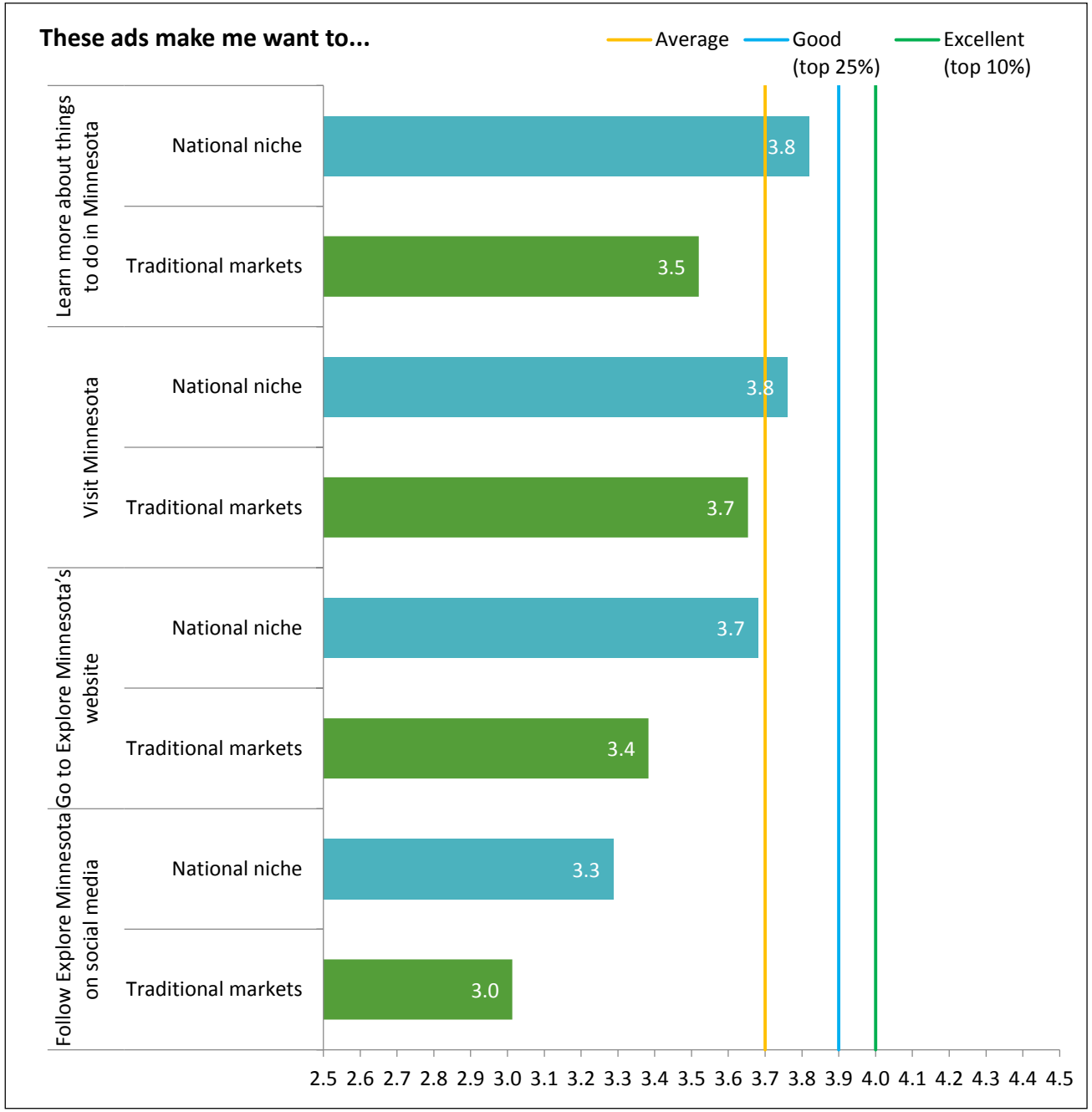
Brand banners: communication ratings

- For the same reason as social, the brand banners get higher ratings than we typically expect from digital banners – these ads show an array of product.
- While ratings for individual banner ads are low in some cases for the more narrow appeal activities shown – golf, in particular – as a whole, this group of ads shows the array of experiences available in Minnesota against the backdrop of the state's beautiful outdoor assets.



Brand banners: impact ratings

- Banner impact ratings follow the pattern we see in other media.
- National niche rate the ads higher than more familiar travelers.
- Among national niche, ratings are above average for generating interest in learning more about Minnesota and generating visit interest.
- In traditional markets, the ads are rated highest for generating visit interest.
- Interest in the website and social media are the lowest rated attributes.



Individual brand banner ads

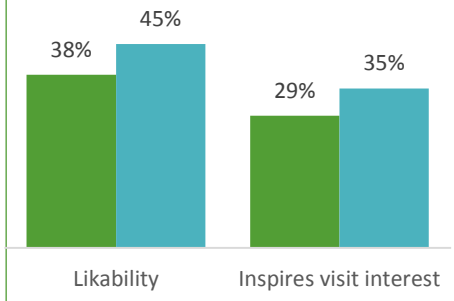
Traditional markets

National niche

Likability: Which one of these statements best describes your feelings about this ad? 1=I don't like it at all and 5=I like it very much.
Inspires visit interest: How much do you agree that this ad makes you more interested in visiting Minnesota? 1=strongly disagree and 5=strongly agree.
Shown are responses of 4 and 5.
Average results from recent destination marketing campaigns are Likability: 63% and Inspires visit interest: 50%

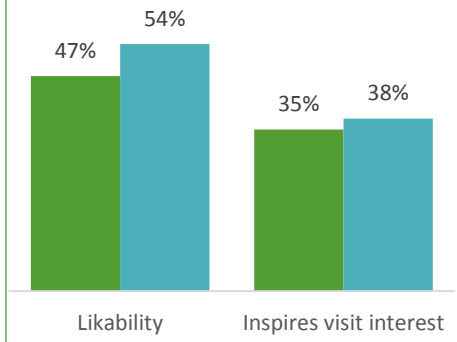
3M Open

- "Great golfing destination."
- "My husband loves golf. All the golfers would want to visit."



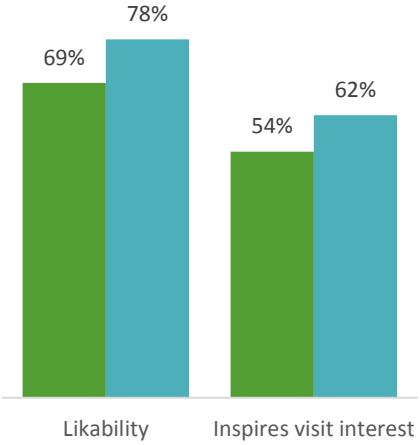
Golf

- "Nice scenic golf course."
- "I love how pretty the picture is."



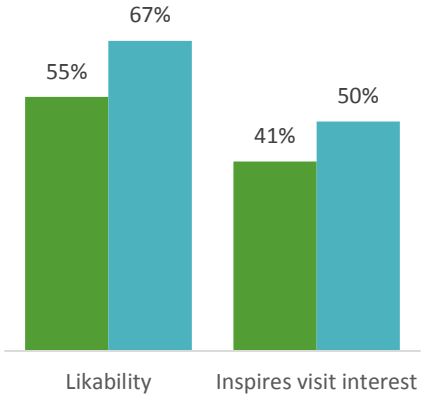
X Games Biking

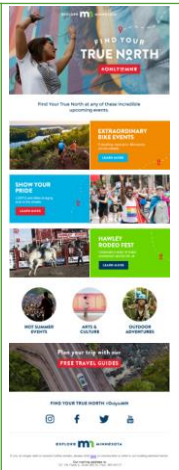
- "Great bike ride and scenery."



X Games

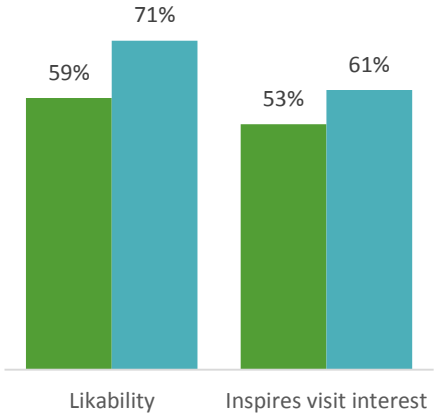
- "Minnesota offers great musical performances."





- "Shows many fun things to do in Minnesota."
- "That there are a variety of activities for every taste."

Email



Individual brand banner ads

Traditional markets

National niche

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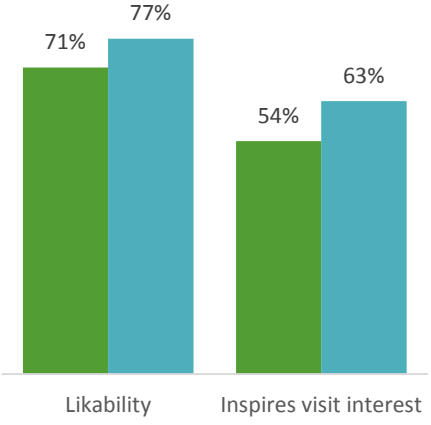
Shown are responses of 4 and 5.
Average results from recent destination marketing campaigns are Likability: 63% and Inspires visit interest: 50%

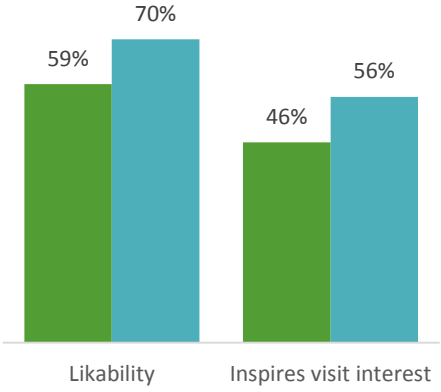
- "I like that Minnesota is a place for family."
- "Shows outdoor fun for the family."
- "Enjoyment for all ages."

Waterfall



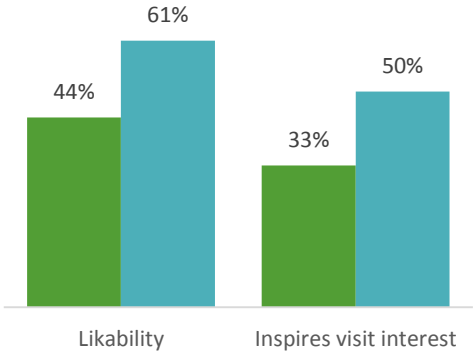
- "Beautiful lakes are a big draw in Minnesota."
- "The scenery and environment are too beautiful. I really like the place."
- "Shows fun outdoor activity."

Canoe



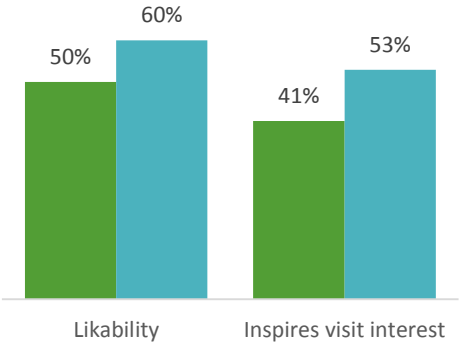
- "Minnesota offers great biking trails with great scenery."
- "Adventure."
- "Fun stuff to do outdoors."
- "Looks like something I would go do. Love it."

Bike



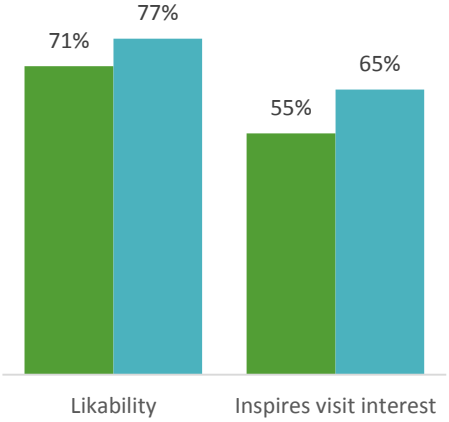
- "Great place to attend a sporting event!"
- "It makes it look like great nightlife activities."

Final Four



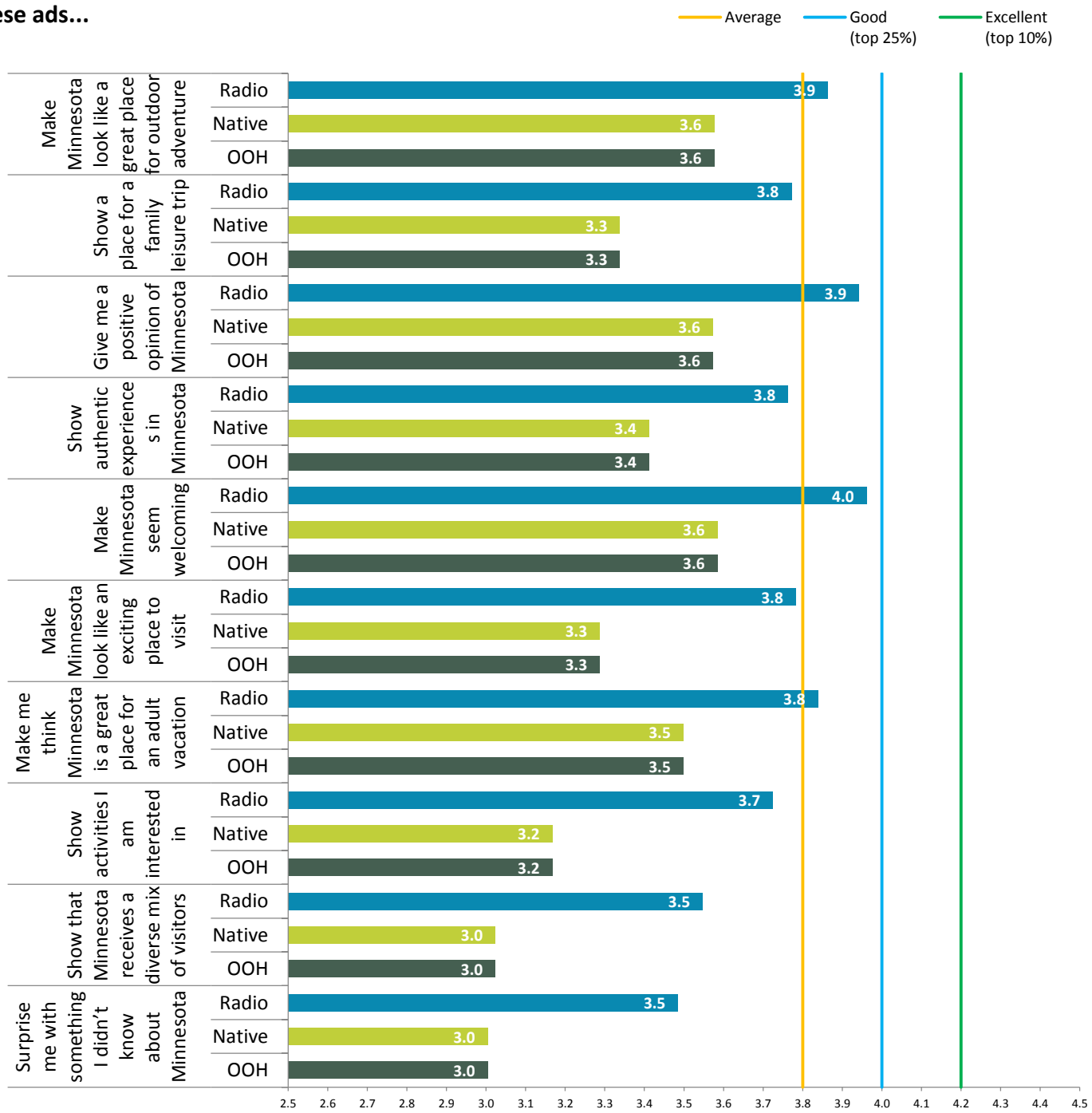
- "This shows what a great outdoor vacation would be there."

Rafting



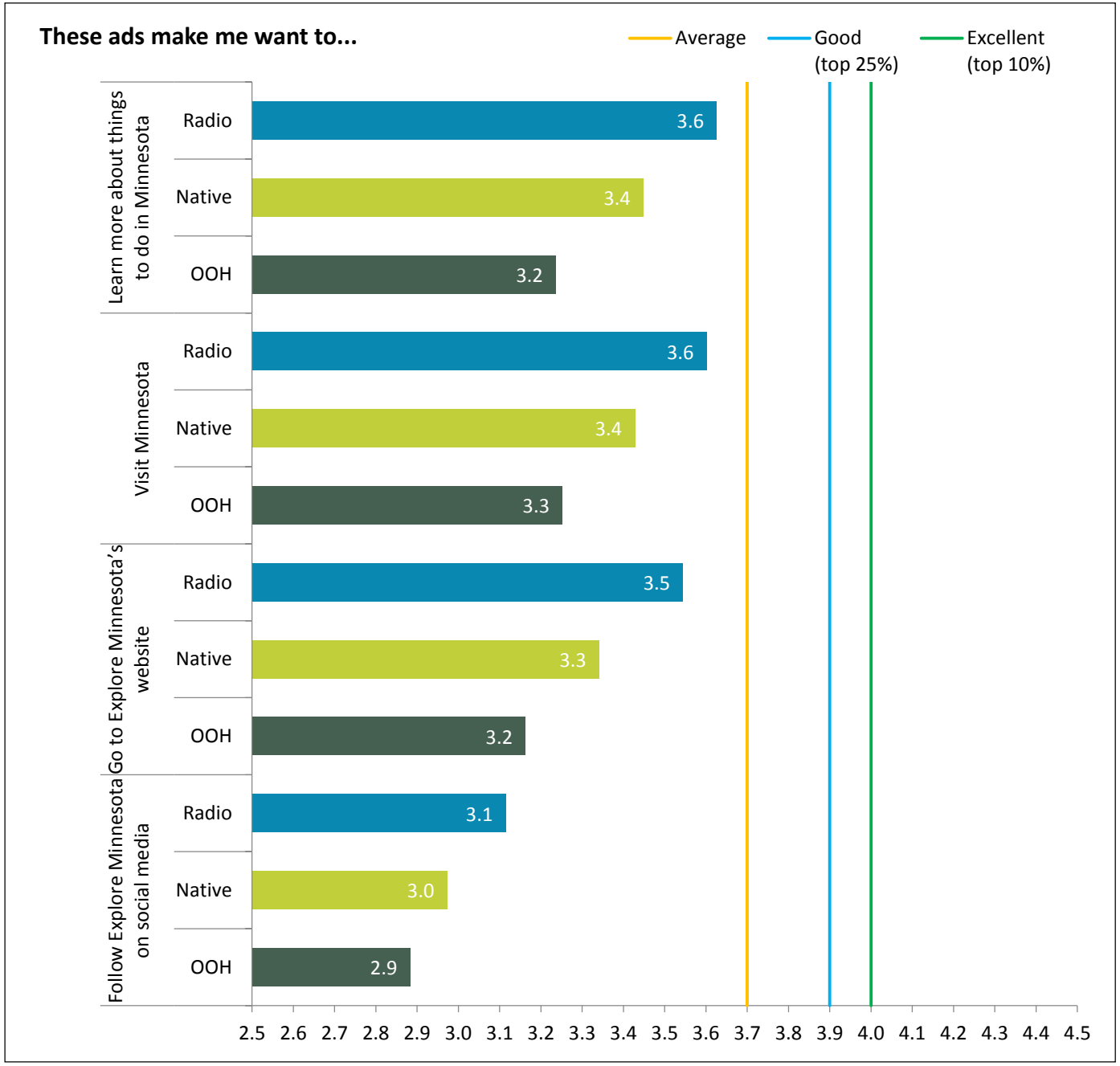
Other brand: communication ratings

- Ratings for the radio, native, and OOH ads follow the same patterns as the other media, with national niche rating each one higher than traditional markets. Ratings from the two audience groups are shown here combined.
- It is notable that radio outperforms the other media. This tells us EMT's radio spot is a strong one. Radio typically does not do well in leisure destination campaigns, since travel is such a visual experience. However, this particular execution is an exception. Radio advertising was limited to Minnesota markets.
- The other takeaway is that the native and out-of-home (OOH) ads receive low ratings on all measures.



Other brand ads: impact ratings

- Impact ratings are below average for the brand radio, native, and OOH ads. And this is not unexpected. The task of these media is to extend the reach of the campaign and reinforce the story told more fully in other media.
- These ads are not intended to influence visitation on their own, but rather to remind travelers of the True North message.



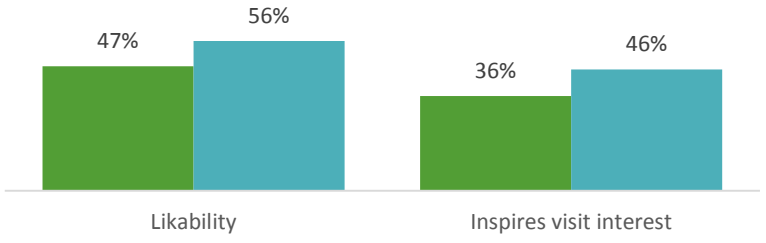
Other brand ads

Traditional markets

National niche

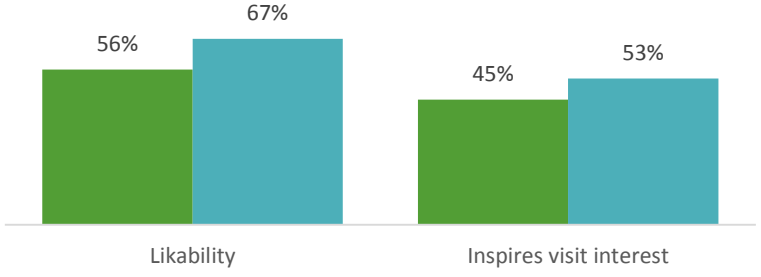
Likability: Which one of these statements best describes your feelings about this ad? 1=I don't like it at all and 5=I like it very much.
Inspires visit interest: How much do you agree that this ad makes you more interested in visiting Minnesota? 1=strongly disagree and 5=strongly agree.
Shown are responses of 4 and 5.
Average results from recent destination marketing campaigns are Likability: 63% and Inspires visit interest: 50%

OOH



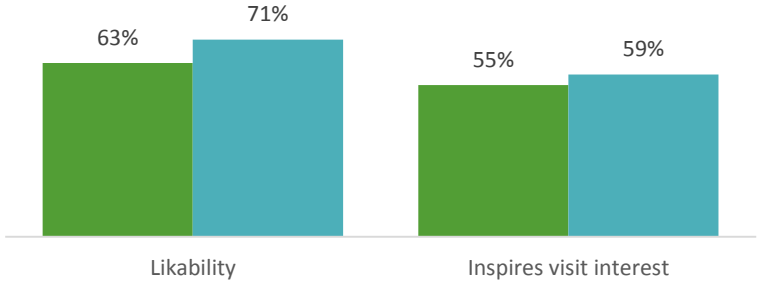
- "I like the slogan on the billboard. It sums up what it is like in the North."
- "Minnesota offers wondrous scenic beauty."
- "It makes me want to go there because of the scenery depicted."
- "The scenery looks beautiful."

Native



- "I like that it talks a little about what Minnesota's small towns have to offer."
- "I like how you can visit towns of Minnesota that are quaint and often forgotten about."
- "Shows uniqueness of Minnesota."
- "Want to learn more about this place."

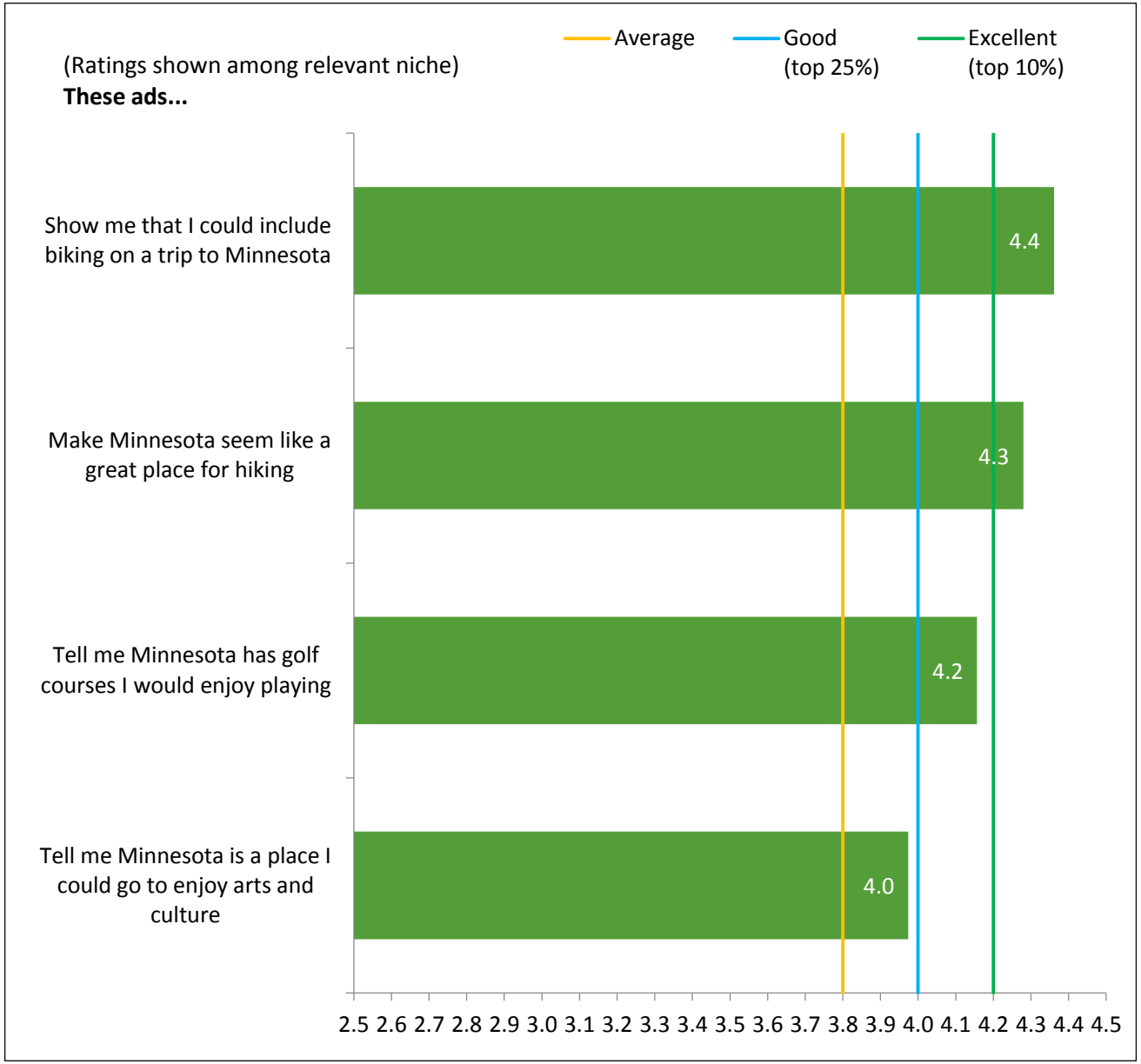
Radio



- "It's a short ad, but it gives you a ton of suggestions for your vacation."
- "It highlights some of the fun and exciting things to do for adults."
- "This ad perfectly sums up the variety of appealing attractions in the state."

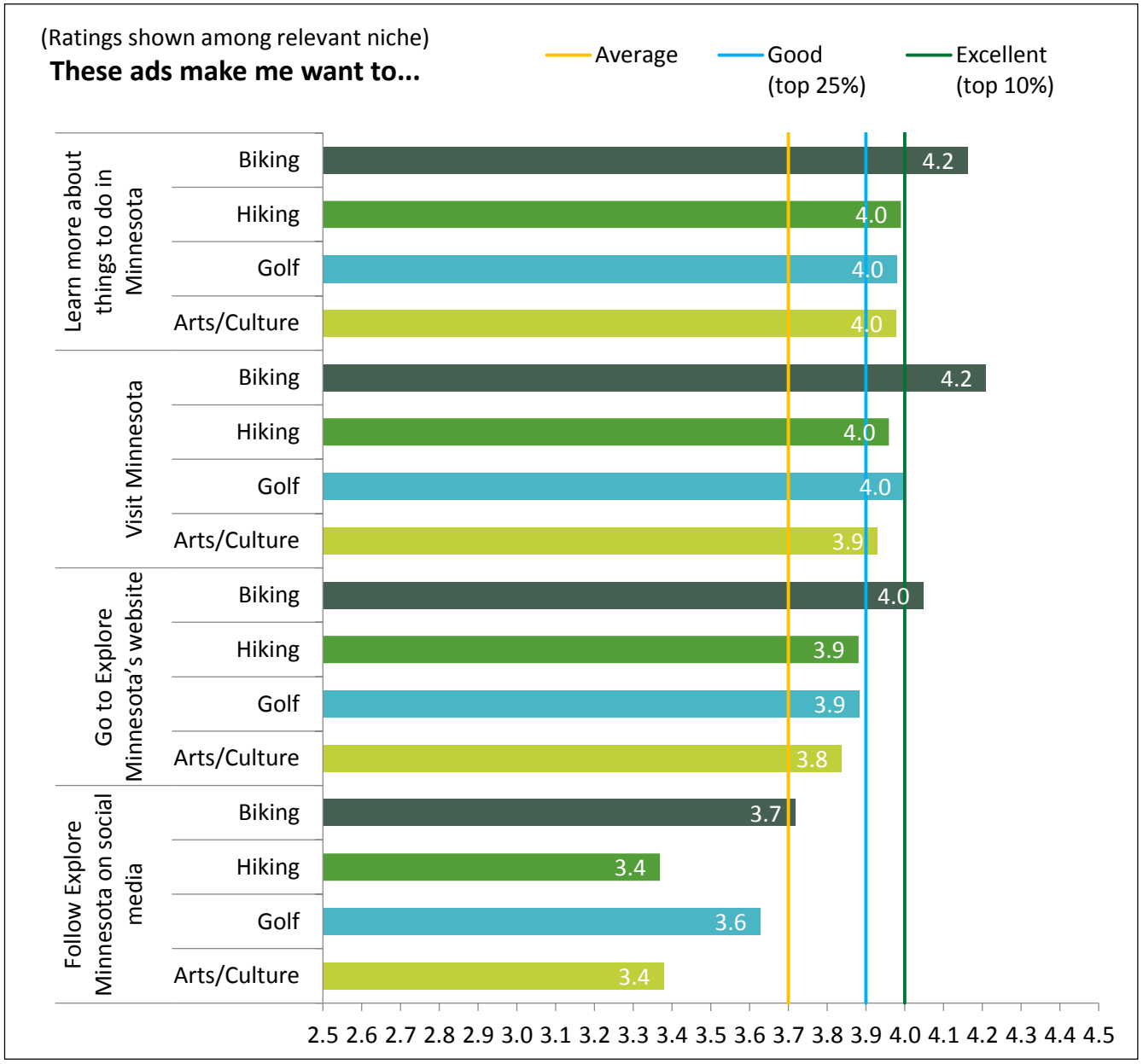
Niche TV/videos: Communication ratings

- Within their respective niche audiences, all four of the niche videos rated above average for presenting Minnesota as a place to do the featured activity.
- The biking spot is the most impactful on the biking audience. The rating for the ads showing a place for biking is among the highest we've seen.
- The hiking video also rates in the top 10% of ads among the hiking niche.
- The golf niche rates the golf spot in the top 25% of ads tested.
- The arts and culture spot faces a steeper challenge, as there is considerably more variety in arts and culture experiences than in the other niche groups. This ad gets above average ratings among arts and culture travelers, but is not as strong as the other executions in their niches.



Niche TV/videos: Impact ratings

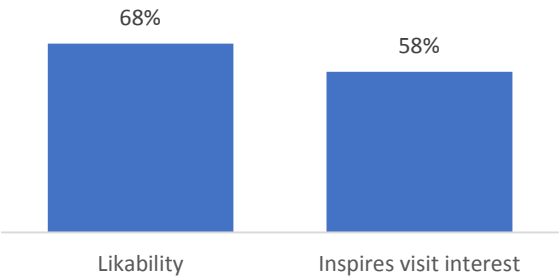
- As we saw with the niche communication ratings, the biking ad is a standout, with ratings in the top 10% for inspiring visit interest, wanting to learn more about Minnesota, and wanting to go to the website. Even ratings for making the biking niche want to follow EMT on social media is above average. This ad clearly resonates with this audience.
- Even though golf ratings among the golf niche were not as strong for the communication ratings, this ad is in the top 10% for making golfers want to visit the state.
- The hiking and arts/culture spots receive above average ratings for this attribute among their audiences.



Niche TV/videos, among relevant niche audience

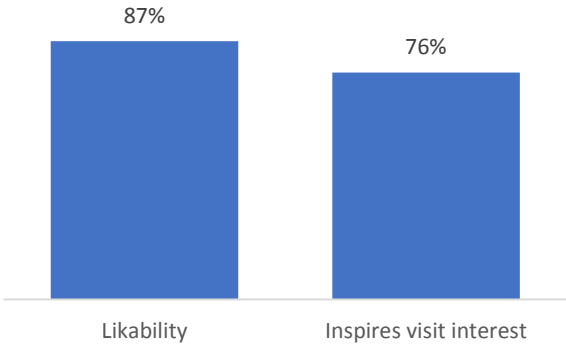
Likability: Which one of these statements best describes your feelings about this ad? 1=I don't like it at all and 5=I like it very much.
Inspires visit interest: How much do you agree that this ad makes you more interested in visiting Minnesota? 1=strongly disagree and 5=strongly agree.
Shown are responses of 4 and 5 among the relevant niche audience; niche includes national and traditional markets.
Average results from recent destination marketing campaigns are Likability: 63% and Inspires visit interest: 50%

Arts + Culture



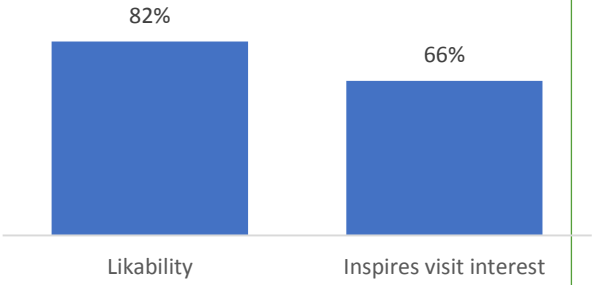
- "Not sure what that was, but it looked interesting."
- "Looks like a great adult vacation with interesting sights to see."
- "I would really like to see that place that was in the video. I have never seen anything like it before."

Biking



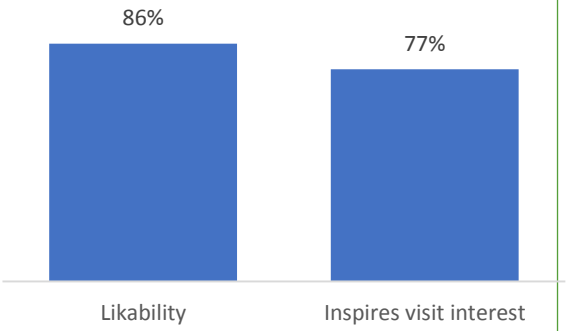
- "I like it. Regular people doing good activity."
- "It makes Minnesota seem like a great vacation spot."
- "That looks gorgeous and exciting. The true north part makes sense. I like the simplicity."
- "This looks like a great place for hiking!"

Golf



- "The scenery background and environment of this video are too beautiful. I really like the place."
- "LOVE the changing leaves and the beauty on the course."
- "Minnesota offers peace and relaxation with the soothing game of golf."

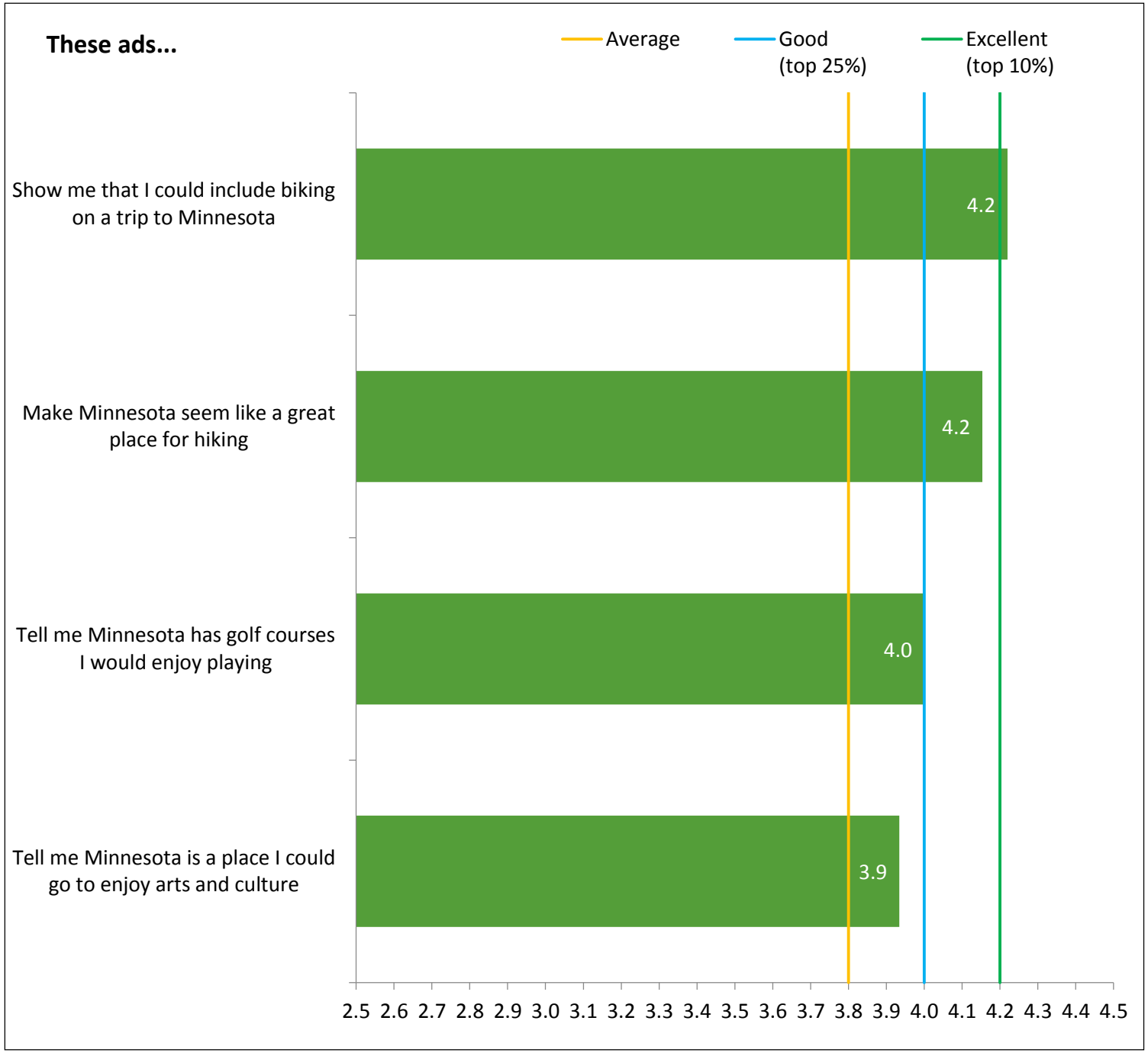
Hiking



- "Even though it's short, the point comes across that Minnesota is beautiful."
- "Now THAT's my idea of a vacation."
- "I love hiking and to do so in such a beautiful area such as Minnesota makes me interested in learning more."
- "I want to hike there right now! Makes me want to find out where it is!"

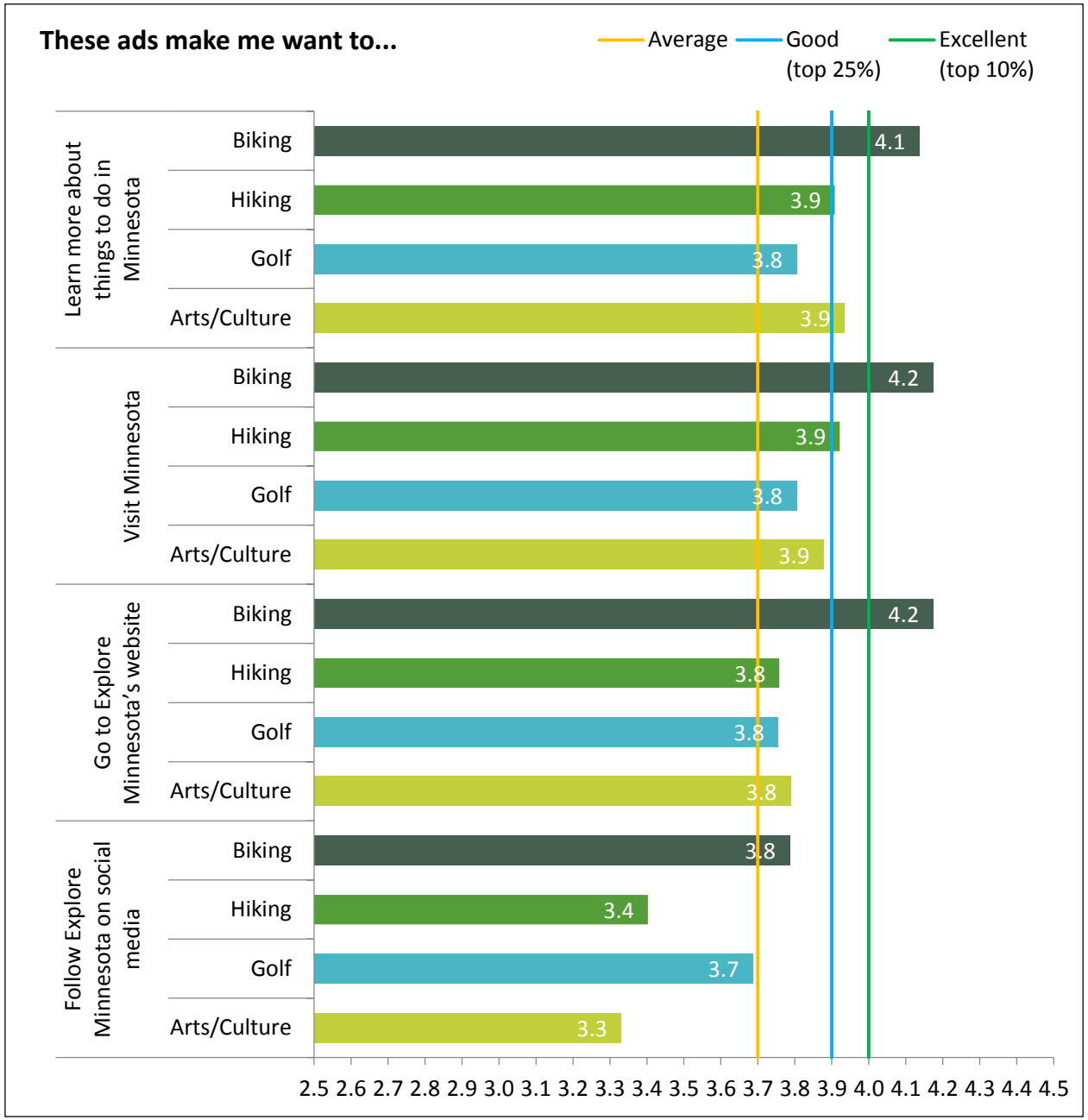
Niche print/digital: Communication ratings

- Communication ratings for the print and native ads fall out very similarly to communication ratings for the niche video spots.



Niche print/digital: Impact ratings

- Impact ratings continue to reflect what we've seen from the niche audience.
- The biking niche is the most motivated by the biking ad to learn more and to visit.
- The hiking niche is the next most influenced by the hiking ad.
- The arts and culture native ad performs similarly to the arts and culture video ad – in the good range for making this niche want to learn more about what Minnesota has to offer.
- Ratings from golf travelers lag behind other niche groups, except for agreement that the ads motivate social following.



Niche print/digital, among relevant niche audience

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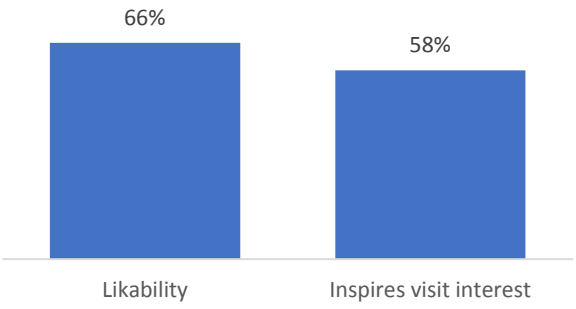
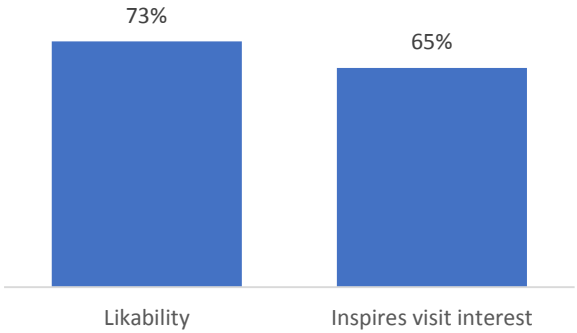
Arts + Culture



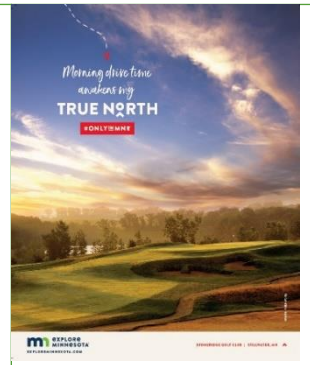
- "What are they doing?"

With more variety in this activity category, travelers may need more information about the activities pictured and available.

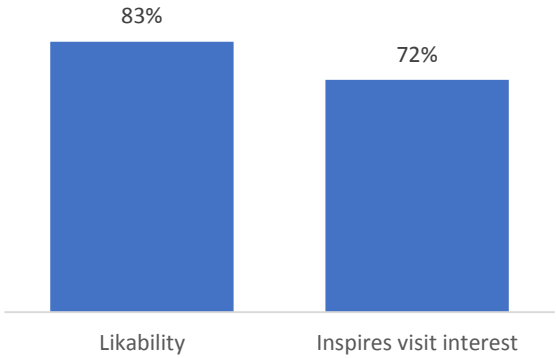
Biking



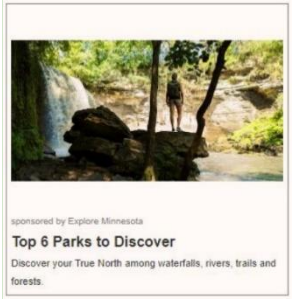
- "Shows the urban environment is welcoming too!"
- "I like how Minnesota offers many bike trails."
- "It looks like a fun thing to do with family."



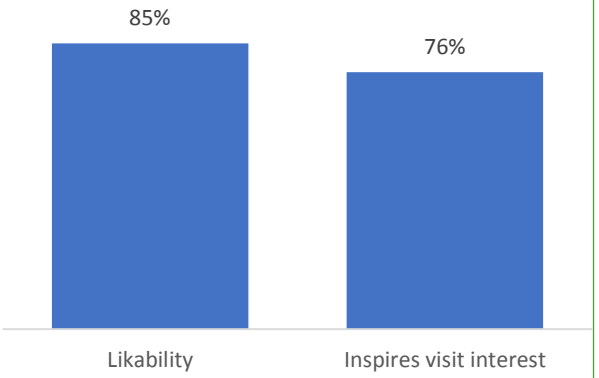
Golf



- "It looks like a golf course and my husband likes golf."
- "Beautiful photograph and looks like a golf course I'd enjoy."



Hiking



- "The scene is beautiful, and I can see myself there with my family."
- "Please name the parks."
- "I love the outdoors, and this gives me insight to what MN has to offer."

Insights

- Across virtually all media, the ads receive very strong ratings, particularly for communicating Minnesota's outdoor product and family friendliness.
- Brand ads were as highly rated and impactful as niche ads on the niche audience. But the ads also show a great deal of product, and in many cases the "niche" activity is not the focus of the image; rather, it is the natural scenery. The upshot is that no matter what we call the ads – brand or niche – when we show people activities and experiences they're interested in, it makes them want to visit.
- National niche travelers are more moved by the ads than traditional market travelers. This is due to a generally positive but vague view the more distant travelers have of Minnesota. In other words, they have no negative associations with the state, but they just don't necessarily consider it as a potential destination. This provides the ads with an excellent opportunity to provide details of the experiences available in Minnesota, fleshing out the positive perceptions of the state. Initial impacts are on perceptions of the state, and over time we would expect Minnesota to be included in more and more consideration sets, ultimately impacting visitation from more distant markets.
- Traditional markets that are more familiar with Minnesota are positive about the ads, but less impacted by them. The brand message is consistent with what people already know, and it may be that more time-sensitive, tactical, event- or season-focused ads that give a sense of immediacy to a visit are more likely to generate trips from these markets. The other thing to note is that these markets are already visiting, so the ads have less opportunity to generate more visits. Tactical ads will help spur repeat visitation as they give travelers new reasons to come to Minnesota.

Appendix – Questionnaire

Explore Minnesota Creative Evaluation + Niche Analysis, October 2019

Questionnaire

Explore Minnesota Tourism
Creative Evaluation

Screeners

zip. What is your ZIP/postal code? _____

Decisionmaker. Who in your household is primarily responsible for making decisions concerning travel destinations?

- ☐ Me
- ☐ My spouse [TERMINATE AFTER SCREENERS]
- ☐ Jointly with my spouse
- ☐ Someone else [TERMINATE AFTER SCREENERS]

screenergrid. Please indicate if each of the following applies to you.

[ROTATE]	YES	NO
I regularly use social media like Facebook, Twitter, or Instagram		
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home	[TRAVEL SCREENER; TERMINATE IF NO]	
I regularly engage in some form of physical exercise like walking, biking or participating in sports to stay healthy		
I use video streaming services like Hulu, Netflix, or Amazon		

age. What is your age? [TERMINATE AT END OF SCREENERS IF UNDER 21]

Beta-test screeners for niche travelers

S1. On your leisure trips, how often do you or those you travel with participate in the following activities?

[ROTATE]	Never	Sometimes	Often	Always
Hiking *				
Mountain biking/fat biking *				
Paved trail/road biking *				
Boating – motor boats				
Paddling – canoeing, kayaking, paddle boarding, etc.				
Motorcycling *				
Playing golf *				
Attending youth sports competitions				
Going to art museums *				
Going to history museums or historical sites *				
Attending plays/theatre/performing arts *				
Learning about local culture *				
Shopping				
Purchasing locally made products *				
Dining at unique locally owned restaurants (non chain)				

1

Attending live music events *				
Seeking out family friendly activities and attractions				
Participating in passive outdoor activities – nature walks, wildlife watching, sightseeing				
Attending parades or cultural festivals *				

[NICHE=1 IF ANSWER OFTEN OR ALWAYS TO ANY *]
********** END OF SCREENERS [ASK THROUGH HERE BEFORE TERMING]**********

S2. In the next year, how likely are you to visit the following places for a leisure trip that involves an overnight stay or is at least 50 miles from home?

[ROTATE]	Not at all likely - 1	Not very likely - 2	Somewhat likely - 3	Very likely - 4	Already planning a trip - 5
Minnesota					
Wisconsin					
Colorado					
Illinois					
Michigan					
South Dakota					
Missouri					

S3. [MN AFFINITY] Please check all that apply to you:

I currently live in Minnesota
I have lived in Minnesota in the past
I have family members or close friends who live in Minnesota
I attended college in Minnesota, or have family or friends who did
I have traveled to or within Minnesota multiple times in recent years
I am a fan of a sports team(s) that is based in Minnesota
None of these

Image

Now we'd like you to focus on just one of these destinations: Minnesota.
Q2. How much do you agree that each of these statements describes Minnesota?

[ROTATE]	Does not describe at all – 1	2	3	4	Describes extremely well – 5
Offers a relaxing atmosphere					
Has great opportunities for adult vacations					
Has stunning scenery					
Has great options for families with children					
Has great parks and trails					
Has exciting spectator sporting events					
Has great outdoor activities					
Has first-rate fishing/hunting					
Has four amazing seasons					
Has charming small towns					
Has fascinating culture and heritage					

2

Has exciting urban entertainment					
Is a place I feel welcome					
Offers a good vacation value for the money					
Is a fun and exciting place to visit					
Is a place for adventure					

Creative evaluation

Next you will be shown a variety of types of travel advertisements. Some advertisements will include sound so please adjust your volume to a comfortable level. Please review each ad carefully and answer the questions that follow. [ROTATE ADS – BY MEDIA TYPE & WITHIN EACH MEDIUM] [SHOW NICHE CREATIVE TO NICHE TRAVELERS, PER S1 AND S3]

BRAND VIDEO/TV

EMT28181904H_FeelingFree_Metro_30_WEB16K Vimeo # - 355973112	EMT28181906H_DiscoverNewPassions_15_SE_WEB16K Vimeo # - 355973565	
FamilyConnections_NE_30_Jan31 Vimeo # - 355974258	SW_NewThings_30_Replace_Jan31 Vimeo # - 355974866	Explore MN Split Rock Light House.mp4

BRAND OOH

OOH 110 Explore Mn

3

Questionnaire

BRAND PRINT

Hiker_Full Page_Layout Sample

Metro_Full Page_Layout Sample

TeePee_Full Page_Layout Sample

BRAND RADIO

ExploreMN - Routes to Adventure - 30 sec.mp4
Vimeo # - 355978458

BRAND DIGITAL
Brand Email
Email.jpg

4

Brand Banners

EMT3277_3MOpen_300x250_Main

EMT3072_SS19_FinalFour_BNR_300x250

EMT3072_Rafting_300x250

EMT3072_Waterfall_300x600_B

EMT3353_SS19_XGames_Biking_BNR_300x600-initial

EMT3353_SS19_XGames_Friends_BNR_300x250-initial

EMT3352_SS19_Golf_300x250-initial

EMT3072_Canoe_728x90.jpg

EMT3072_Bike_Initial_728x90

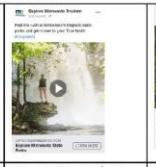
Brand Native

Brand Native1

5

Brand Social

Largest Candy Store - FB Text Video (MN Only).JPG
- 360266474


FB cinemagraph.jpg
FB cinemagraph video.mp4
- 360268663

FB carousel.jpg

FB carousel 2
358900740

NICHE VIDEO/TV

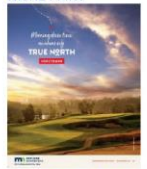
Arts & Culture_06Video_Jan31.mpp4
Vimeo # - 356451604

Biking_06Video_Jan30.mp4
Vimeo # - 356452706

Golf_06Video_August.mp4
Vimeo # - 356456784

Hiking_06Video_Jan30.mp4
Vimeo # - 356457084

NICHE PRINT


PGA_FYTN_Golf_8.5x10.5

6

Questionnaire

NICHE DIGITAL

Banners

EMT3072_Bike_Initial_320x50

Niche Native

Niche Native Biking	Niche Native Hiking	Niche Native Arts Culture

[AFTER EACH AD, ASK AD1-AD4]

AD2. Which one of these statements best describes your feelings about this ad?

- I like it very much
- I like it
- I neither like it nor dislike it
- I don't like it
- I don't like it at all

AD3. How much do you agree that this ad makes you more interested in visiting Minnesota?

Strongly disagree - 1	2	3	4	Strongly agree - 5

AD4. In just a few words, please tell us why you feel that way. [SHOW SMALL TEXTBOX]

[ASK GRIDS AFTER EACH MEDIUM]

Grid_Communication. How much do you agree that these [MEDIUM] ads ...?

[ROTATE]	Strongly disagree - 1	2	3	4	Strongly agree - 5
Show a place for a family leisure trip					
Make me think Minnesota is a great place for an adult vacation					
Make Minnesota look like an exciting place to visit					
Make Minnesota seem welcoming					
Show that Minnesota receives a diverse mix of visitors					
Show authentic experiences in Minnesota					
Surprise me with something I didn't know about Minnesota					
Give me a positive opinion of Minnesota					

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Show activities I am interested in					
Make Minnesota look like a great place for outdoor adventures					

Grid_Niche. [ASK ONLY OF NICHE TRAVELERS] Grid_Communication. How much do you agree that these [MEDIUM] ads ...?

[ROTATE]	Strongly disagree - 1	2	3	4	Strongly agree - 5
Tell me Minnesota is a place I could go to enjoy arts and culture					
Make Minnesota seem like a great place for hiking					
Show me that I could include biking on a trip to Minnesota					
Tell me Minnesota has golf courses I would enjoy playing					

Grid_Impact. Thinking about all the ads you've just seen and heard, please indicate how much you agree that these ads make you want to... ?

[ROTATE]	Strongly disagree - 1	2	3	4	Strongly agree - 5
Learn more about things to do in Minnesota					
Go to Explore Minnesota's website					
Visit Minnesota					
Follow Explore Minnesota on social media					

Post-exposure visit intent

Q3. Now, having seen these advertisements, how likely are you to visit Minnesota for a leisure trip in the next year?

Not at all likely - 1	Not very likely - 2	Somewhat likely - 3	Very likely - 4	Already planning a trip - 5

Demographics

The following questions are for classification purposes only so that your responses may be grouped with those of others. [DO NOT FORCE]

marital. What is your marital status? Are you...?

- Married/Domestic Partnership/Civil Union
- Divorced/Separated
- Widowed
- Single/Never married

ppinhh. Including you, how many people are currently living in your household? _____

kids. [ASK IF ppinhh>1] How many living in your household are children under the age of 18? _____

8

education. Which of the following categories represents the last grade of school you completed?

- High school or less
- Some college/technical school
- College graduate
- Post-graduate degree

Income. What is your total annual household income before taxes? *In USD*

- Less than $50,000
- $50,000 - $74,999
- $75,000 - $99,999
- $100,000 - $124,999
- $125,000 - $149,999
- $150,000 or more

ethnicity. What of the following best describes your ethnic heritage? Are you... *Select all that apply.* [ALLOW MULTI]

- Caucasian/White
- African-American/Black
- Latino/Hispanic
- Asian
- American Indian
- Other (Specify _____)

gender. Do you identify as...?

- Male
- Female

orientation. Do you identify as LGBTQ?

- Yes
- No
- Prefer not to answer

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