

EXPLORE **m** MINNESOTA™

Minnesota Livability Research

February 2024





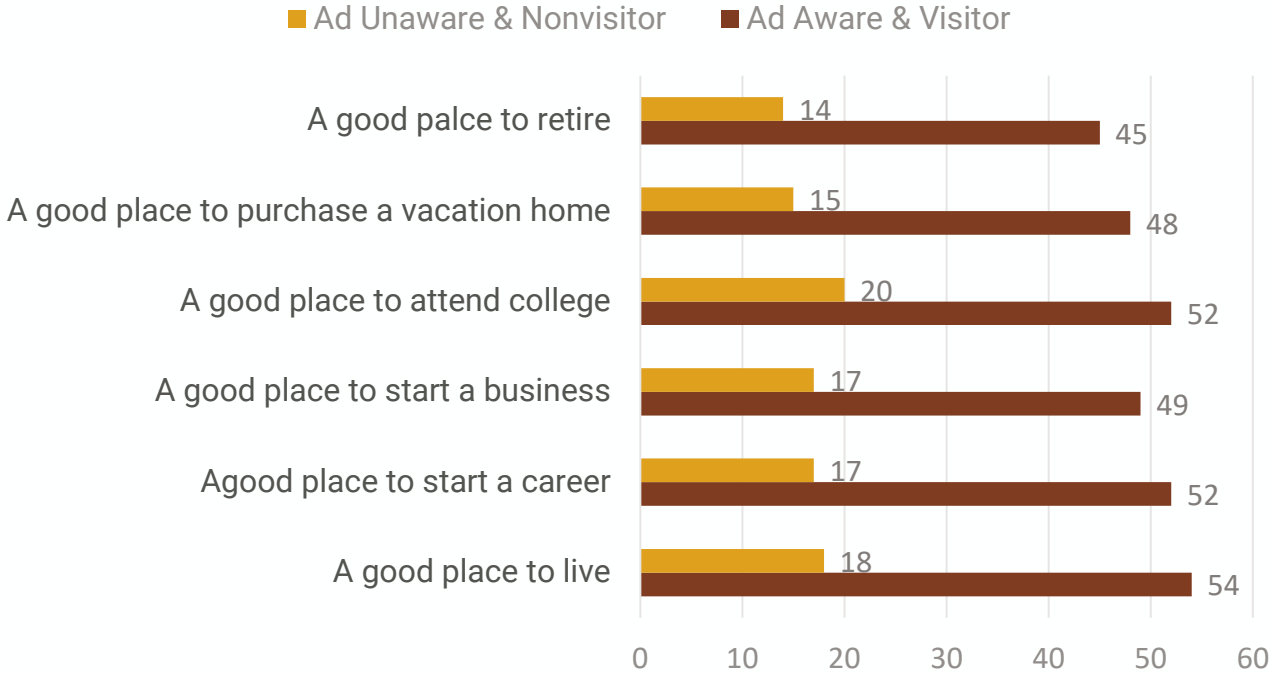
We have known that the positive impacts of tourism advertising campaigns extend beyond increasing the appeal of a destination as a place to visit.

Most recently, through a 2022 Longwoods Halo study, we confirmed that tourism advertising increases the favorability of Minnesota as a place to live and work.

Full [2023 Minnesota Halo Effect Research results](#) are posted on the industry website.

Tourism has a positive “halo effect” on economic development

Percent that Strongly Agree with Statement
Impact of EM 2022 S/S Campaign



Source: Longwoods 2023 study measuring the impact of Explore MN 2022 Spring/Summer Ad Campaign



Traveler profile studies consistently reveal that Minnesota is a top destination based on travel motivators, including outdoor recreation.

SMARI Traveler Profile Studies include the question “How much do you agree that each of these statements describes MN?”. In the 2023 study the statement “great place to live” received a score of 4.2 which is in the top 10% compared to benchmarks.

[Full 2023 Winter and Spring/Summer Minnesota Traveler Profiles](#) are posted on the industry website.

Visitors agree that Minnesota has a lot to offer and is a great place to live

How much do you agree that each of these statements describes MN?	Summer 2023 Score
Has great outdoor activities	4.5
Has four amazing seasons	4.4
Has great options for families with children	4.3
Is a place I feel welcome	4.3
Great place to live	4.2
Has vibrant cities	4.1
Great place to work	4.0

Source: SMARI 2023 Spring/Summer Traveler Profile



Resident & non-resident research

Research objective was to inform a refreshed Minnesota brand platform focused on driving migration into the state.

Two online surveys were distributed to 21 to 55 year olds in November 2023.

Non-Minnesota residents:

- 1,085 individuals open to moving to Minnesota
- Current residents of the following target states: CA, CO, FL, IL, IN, IA, MA, MI, NY, ND, OH, SD, TN, TX, WA and WI



Resident & non-resident research summary

Non-resident knowledge of Minnesota

Key question 1 - Moving decision factors

Key question 2 - Minnesota's strengths

Key question 3 - Minnesota motivators

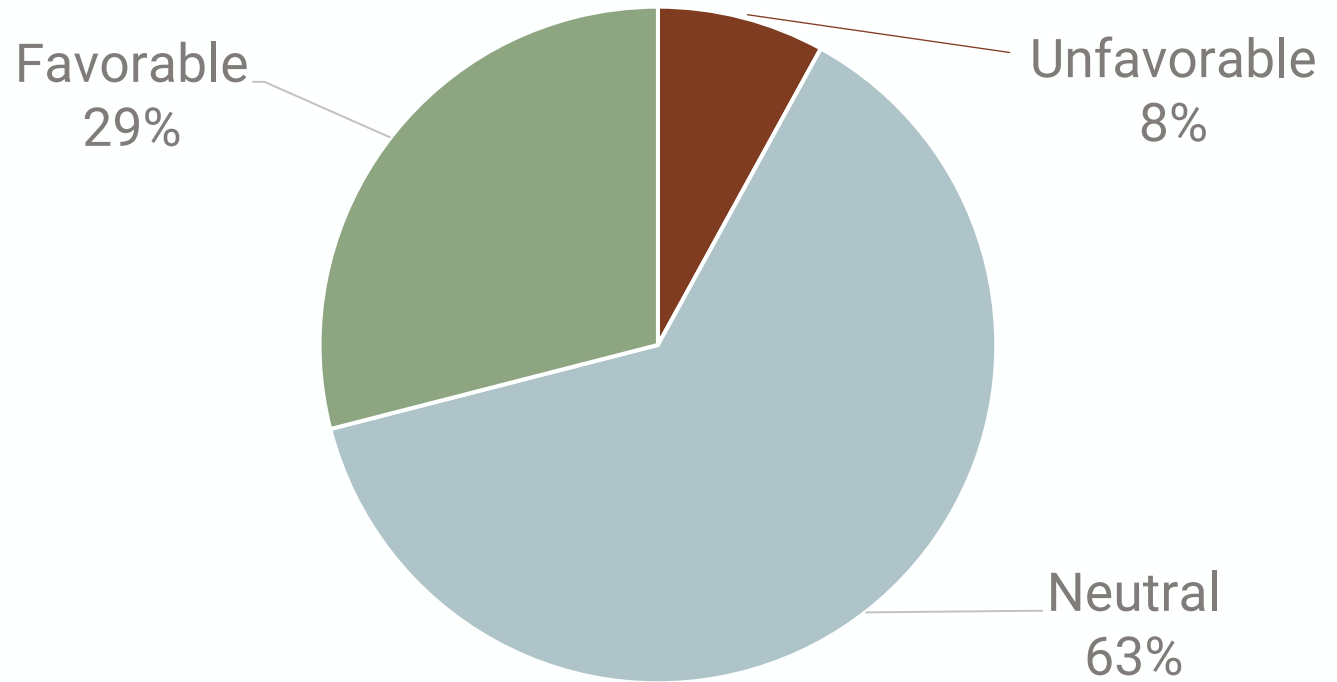
Other research insights

Target state residents were asked how familiar they are with certain states. For Minnesota, 30% have a low amount of knowledge, 48% have a neutral amount of knowledge and 22% a high amount of knowledge.

Most (92%) target state residents have a neutral or favorable view of Minnesota, and therefore are open to state messaging.

Most target state residents have limited MN knowledge, but they're open minded

Target State Residents' Opinion of Minnesota

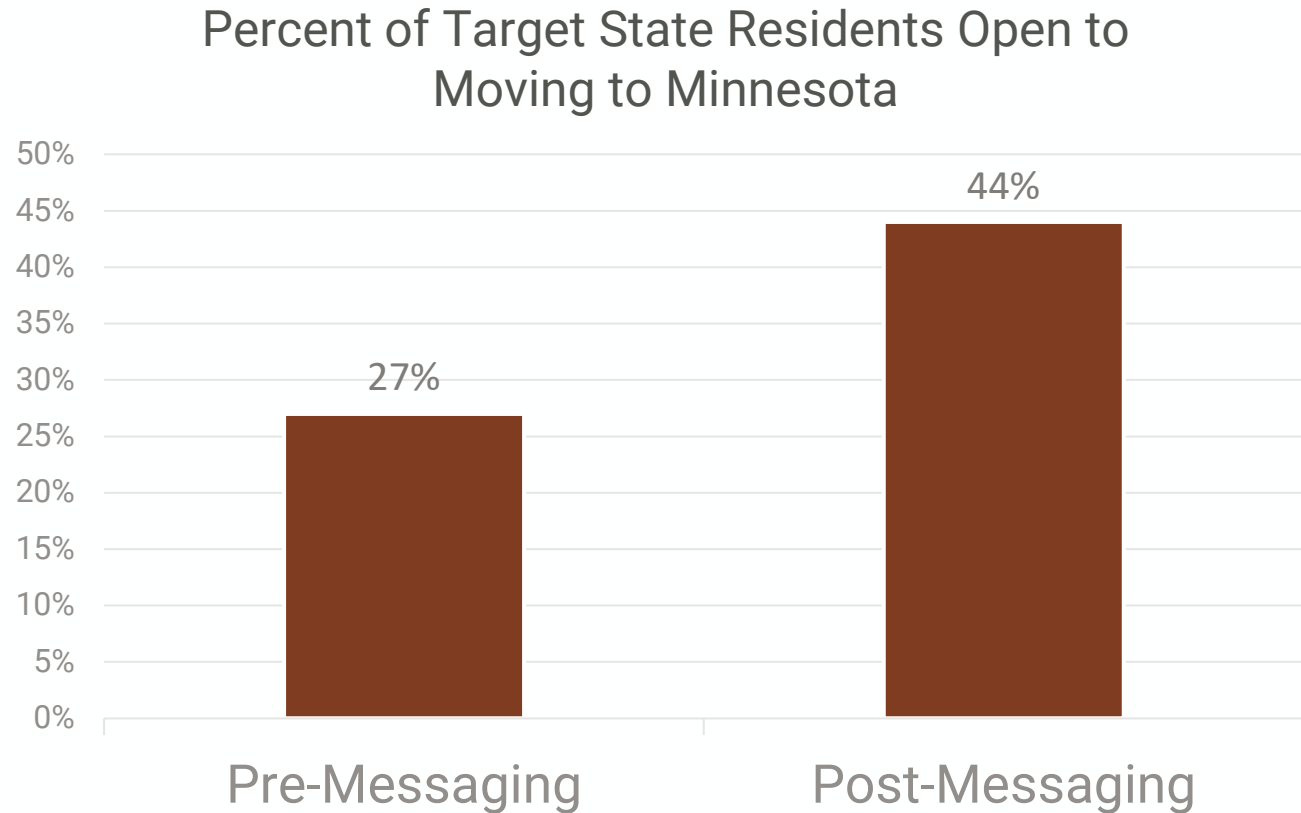


Target state residents were presented 12 statements about Minnesota.

After receiving this messaging, the percent interested in moving to Minnesota for personal or professional reasons increased from 27% to 44%.

The 12 messages resonated especially well with parents, progressive Democrats and the LGBTQIA+ community.

Interest in moving to Minnesota increase after messaging





What drives people's perceptions, interests and decisions to move to or visit a state (and Minnesota specifically)?

The three most important factors are:

1. Overall quality of life
2. Economy and security
3. Livability

Six important factors in deciding where to live

1 Quality of Life



- Is a beautiful place to live
- A place where I can see myself living happily for a long time
- Is welcoming to all
- Is good for overall health and wellbeing
- ◆ Has high-quality health care
- ◆ A place to feel proud about

2 Economy/Security



- Is a place where I can achieve my career goals
- Has high quality job opportunities
- Is safe

3 Livability



- Has access to nature and outdoor spaces
- Is affordable
- Has home ownership opportunities
- Is peaceful and quiet

4 Diverse/Growing



- Is culturally diverse
- Has vibrant cities and metropolitan areas
- Is committed to equity and inclusion for all
- Is growing and evolving
- ◆ Prioritizes environmental sustainability

5 Family/Schools



- Has good schools
- Is a good place to raise a family

6 Civics/Community



- Has citizens who are engaged in their communities
- Has entrepreneurial opportunities
- Has people like me
- Aligns with my political values



What does Minnesota own in its residents' and recent transplants' hearts and minds?

Minnesotans are proud and really love calling their state home. They rate Minnesota well on important attributes, including:

- Is a place where I can see myself being happy for a long time
- Is a beautiful place to live
- Has high quality healthcare
- Is good for overall health and well-being
- Has access to nature and outdoor spaces



What themes differentiate Minnesota and could attract non-residents to our state?

Minnesota is in a strong position to recruit new residents. The top five facts that are likely to encourage individuals to consider Minnesota are:

1. Minnesota's **cost of living** is below the national average
2. Minnesota is ranked as a top-5 overall state based upon a number of **quality-of-life factors**
3. Minnesota has been recognized among the **healthiest and happiest states** in the country
4. Minnesota, you're never far from the **beauty of nature**
5. Minnesota is home to one of the most **vibrant arts, entertainment and culinary scenes** in the county



More insights – college students

College students in Minnesota are very open to living in the state for at least a few more years.

In addition to quality-of-life factors and economic security, students new to the state are especially attracted to Minnesota's lower cost of living and diversity.



More insights – Northeast & Midwest markets

The Northeast and Midwest regions have the highest potential for attracting new Minnesotans.

Northeasters see Minnesota as very livable but need convincing that our quality-of-life features like high quality healthcare are better.

Midwesterners recognize the quality of both jobs and healthcare available in MN. They are also more likely to say that Minnesota is welcoming to all.



More insights – Transplants vs. Boomerangers

While both Minnesota Transplants and Boomerangers moved in part for a better quality of life, Boomerangers are twice as likely to have moved back to be closer to family.

Transplants often come to Minnesota for a new job opportunity.



Research implementation

Full Minnesota Resident & Non-Resident Research report is available on the Industry website.

Explore Minnesota for Business is applying research insights across initiatives, including advertising creative development and marketing media targeting.



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Thank you