Minnesota
2013 Tourism Advertising Evaluation and Image Study

Final Report
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Longwoods International was engaged by Explore Minnesota Tourism to undertake an evaluation of their spring/summer 2013 tourism advertising campaign.

The campaign appeared on TV, radio, online and in print.

The ads were designed to:
- Promote leisure travel to Minnesota
- Encourage traffic to www.exploremn.com, the state’s tourism website

Minnesota’s advertising markets included:
- Minnesota, North Dakota, South Dakota, Illinois, Wisconsin, Iowa and Winnipeg, Manitoba, Canada

- Campaign spending totaled $2.3 million.
Research Objectives

- The purpose of this research is to provide:
  - fundamental strategic insights about the image of Minnesota and its key competitors with respect to key destination choice factors;
  - an evaluation of the spring/summer 2013 tourism advertising campaign in terms of:
    - top line measures:
      - awareness of the advertising
      - impact on Minnesota’s image as a travel destination
    - the bottom line return on Minnesota’s investment in the campaign in terms of:
      - incremental travel to Minnesota
      - incremental traveler spending in Minnesota
      - incremental state and local taxes
The study was conducted among a representative sample of adult travelers (18+) residing in Minnesota’s advertising markets.

‘Travelers’ means respondents had taken a day and/or overnight pleasure trip anywhere in the past 3 years and intend to take another in the next 2 years.

The survey was conducted via a major online consumer panel which is demographically balanced to represent the population in the markets surveyed.

1,400 individuals responded to the research
The questionnaire addressed three key areas:

- **Minnesota’s Image as a Travel Destination**
  - respondents rated Minnesota and selected competitive destinations across an extensive list of characteristics or destination attributes.

- **Travel to Minnesota**
  - respondents reported the number of day and overnight trips they took to Minnesota during and shortly after the advertising campaign.

- **Advertising awareness**
  - actual creative from the 2013 campaign was exposed and respondents reported recall of each.
    - we use this forced exposure approach to ensure that we are measuring the state-sponsored advertising only – not that of Minnesota’s attractions and accommodation facilities.
ROI calculation:

- The Longwoods R.O.EYE™ method quantifies the relationship between awareness of campaign elements and trip taking.
- A baseline measure is generated to estimate the level of visitation that would have occurred in the absence of advertising activity.
- Using the principles and techniques of experimental design, we control for the effects of internal and external factors that could otherwise influence the result.
Executive Summary
Travel Motivators

- In the survey, respondents were asked to evaluate several destinations overall and on a series of detailed image attributes.
- Through statistical analysis, we have derived the relative importance of each attribute in determining people’s overall interest in the destinations.
- Then, in order to better communicate the results, the data have been grouped into 11 broader categories, or travel motivators, and ranked from more important to less important.
The more important a travel motivator is, the more important it should be for a destination to communicate that message about itself, taking into consideration its ability to deliver on the promise with its product.

Within each travel motivator category, the image attributes that make up that category are also presented in their order of importance.

When evaluating Minnesota’s image and product delivery, and those of the competitive set, it is critical to keep the relative importance of each attribute in mind.
Travel Motivators

- For travelers, the top motivators for getting on the destination wish list are **exciting**, followed by **unique** and **adult vacation**:  
  - the notion of **excitement** comes from being seen as fun, with a sense of adventure and a must-see destination  
  - **uniqueness**, including the local people, culture and traditions  
  - **adult vacation**, the perceived suitability for adults and couples, is important because they are paying for the trip
Travel Motivators

- Several factors are of moderate importance individually; but they include some of the key rational features that bring to life the emotional excitement that attracts people to a destination:
  - **popularity** as a tourist destination in general
  - **family atmosphere** refers to a destination’s perceived appeal for kids and families
  - a **worry-free** environment, because being perceived as relaxed and friendly is important
  - the availability of **luxurious** accommodations and dining
  - good **sightseeing**, particularly the overall variety of things to see and do, and beautiful scenery
  - the opportunities for **entertainment**, including festivals, nightlife, shopping, museums and theater
Travel Motivators

- Relatively low on the priority list are:
  - opportunities for **sports and recreation**
  - **affordability** refers to the costs associated with getting to and staying at a destination:
    - although relatively unimportant at the wish list stage, cost usually rises in importance the closer one gets to closing the sale
Minnesota’s Image

- Minnesota’s image strengths versus these competitors as a group are:
  - Most aspects of water-related outdoor adventure – excellent boating/water sports, fishing, canoeing/kayaking, as well as snowmobiling
  - Urban experiences such as excellent shopping and great theater & performing arts
  - Beautiful fall color scenery
  - Spectator sporting events and interesting festivals/fairs/events (the latter is a hot button)
  - Excellent resorts/cabins/cottages (a hot button)
Nonetheless, travelers perceive some significant disadvantages to visiting Minnesota relative to the competition, the most important of which are:

- not considered a must-see destination
- not as exciting as other destinations
- not necessarily a unique place to visit
- less of an adventure is visit
- less popular with vacationers overall

Other major perceptual weaknesses are in the less important areas of:

- Authentic historical sites
- Excellent state/national parks
- Activities such as hiking and bicycling/mountain biking
Minnesota’s Product Delivery

- The image ratings we just discussed looked at perceptions of Minnesota and the competition among the broad population of potential travelers in Minnesota’s target markets. Within that broad population are some people who have visited Minnesota in the recent past, i.e. who have experienced Minnesota’s product, and some who haven’t.

- The analysis that follows examines recent visitors’ image of Minnesota based on recent experience (“product delivery”) compared to the image ratings of those who have never actually visited, i.e., whose perceptions are based on “pure image”.

This is essentially the difference between the expectations of those who have not been to Minnesota vs. the experiences of those who have. When the experience falls short of expectations, there may be a problem with the product. When experience exceeds expectations, there is a great opportunity to educate those who don’t know how wonderful Minnesota is.
In this survey people who have visited Minnesota in the past two years gave Minnesota substantially higher ratings for every one of the many attributes on which they evaluated the state than people who had never visited.

In other words, the first time visitor is very pleasantly surprised by what they experience in Minnesota.

The difference is in many cases so large that the conclusion one could draw is that with such a good product, Minnesota has more of an awareness problem than a product problem.
Minnesota’s Product Delivery

- The greatest differences in “perception vs. reality” are:
  - Minnesota’s urban offerings: theater & performing arts, excellent museums & art galleries, excellent shopping, exciting nightlife
  - The outdoor and water-related activities such as boating & water sports, canoeing/kayaking, fishing, camping, golf
  - The all-important attributes relating to being a fun place for a vacation, offering lots to see and do on a vacation, being a good place for adults to vacation and hosting interesting festivals/fairs/events.
Travel Motivators & Hot Buttons
In order to determine the key factors that motivate travel and destination of choice, respondents are asked to rate selected states across a robust list of attributes or characteristics.

Statistical correlations are then used to establish the degree of association between each attribute and the overall rating, “A place I would really enjoy visiting.”

- A high correlation reveals an attribute to be an important motivator. The attributes with the highest correlations are referred to as ‘Hot Buttons’.
- A lower correlation reveals an attribute to be of lesser importance.

The Travel Motivating factors are calculations that reflect the aggregated importance across attributes related by subject.
Travel Motivators

Base: Residents of Minnesota’s Regional Advertising Markets

Relative Importance*

* A measure of the degree of association between each factor and whether Minnesota is a place “I would really enjoy visiting.”
Minnesota’s Hot Buttons

<table>
<thead>
<tr>
<th>Top 15 Hot Buttons</th>
</tr>
</thead>
<tbody>
<tr>
<td>A fun place for a vacation</td>
</tr>
<tr>
<td>Lots of things to see and do</td>
</tr>
<tr>
<td>Must-see destination</td>
</tr>
<tr>
<td>An exciting place</td>
</tr>
<tr>
<td>Unique vacation experience</td>
</tr>
<tr>
<td>A vacation there is a real adventure</td>
</tr>
<tr>
<td>Great for an adult vacation</td>
</tr>
<tr>
<td>Popular with vacationers</td>
</tr>
<tr>
<td>Children would enjoy</td>
</tr>
<tr>
<td>Good place to relax</td>
</tr>
<tr>
<td>Interesting small towns/cities</td>
</tr>
<tr>
<td>Interesting festivals/fairs/events</td>
</tr>
<tr>
<td>Truly beautiful scenery</td>
</tr>
<tr>
<td>Excellent resorts/cabins/cottages</td>
</tr>
<tr>
<td>First class hotels</td>
</tr>
</tbody>
</table>
Minnesota's Image vs. the Competition
Minnesota's Overall Image

Base: Residents of Minnesota’s Regional Advertising Markets

- Exciting: 42%
- Unique: 41%
- Adult Vacation: 55%
- Popular: 42%
- Family Atmosphere: 47%
- Worry Free: 57%
- Luxury: 55%
- Sightseeing: 56%
- Entertainment: 41%
- Sports and Recreation: 57%
- Affordable: 47%
Minnesota's Overall Image vs. The Competition

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>Feature</th>
<th>Minnesota</th>
<th>Competitors*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exciting</td>
<td>42</td>
<td>46</td>
</tr>
<tr>
<td>Unique</td>
<td>41</td>
<td>49</td>
</tr>
<tr>
<td>Adult Vacation</td>
<td>55</td>
<td>57</td>
</tr>
<tr>
<td>Popular</td>
<td>42</td>
<td>48</td>
</tr>
<tr>
<td>Family Atmosphere</td>
<td>44</td>
<td>47</td>
</tr>
<tr>
<td>Worry Free</td>
<td>44</td>
<td>57</td>
</tr>
<tr>
<td>Luxury</td>
<td>48</td>
<td>55</td>
</tr>
<tr>
<td>Sightseeing</td>
<td>57</td>
<td>56</td>
</tr>
<tr>
<td>Entertainment</td>
<td>41</td>
<td>48</td>
</tr>
<tr>
<td>Sports and Recreation</td>
<td>49</td>
<td>57</td>
</tr>
<tr>
<td>Affordable</td>
<td>47</td>
<td>57</td>
</tr>
</tbody>
</table>

* Competitors include: North Dakota, South Dakota, Colorado, Illinois, Montana, Wisconsin
Minnesota's Image vs. The Competition — Exciting

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>Statement</th>
<th>Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exciting</td>
<td>42 (Minnesota) 46 (Competitors)</td>
</tr>
<tr>
<td>A fun place for vacation</td>
<td>50 (Minnesota) 50 (Competitors)</td>
</tr>
<tr>
<td>Must-see destination</td>
<td>45 (Minnesota) 45 (Competitors)</td>
</tr>
<tr>
<td>An exciting place</td>
<td>42 (Minnesota) 42 (Competitors)</td>
</tr>
<tr>
<td>Vacation there is a real adventure</td>
<td>48 (Minnesota) 48 (Competitors)</td>
</tr>
</tbody>
</table>
Minnesota's Image vs. The Competition — Unique

Base: Residents of Minnesota’s Regional Advertising Markets

Percent Who Strongly Agree

- Unique
- Unique vacation experience

Minnesota
Competitors

41
49
Minnesota's Image vs. The Competition — Adult Vacation

Base: Residents of Minnesota’s Regional Advertising Markets

- Adult Vacation
- Good for an adult vacation

Percent Who Strongly Agree

- Minnesota
- Competitors
Minnesota's Image vs. The Competition — Popular

Base: Residents of Minnesota’s Regional Advertising Markets

Percent Who Strongly Agree

- Popular
  - Minnesota: 42%
  - Competitors: 48%

- Popular with vacationers
  - Minnesota: 42%
  - Competitors: 48%
Minnesota's Image vs. The Competition — Family Atmosphere

Base: Residents of Minnesota’s Regional Advertising Markets

- **Family Atmosphere**
  - Minnesota: 44%
  - Competitors: 47%

- **Children would enjoy**
  - Minnesota: 47%
  - Competitors: 44%

Percent Who Strongly Agree

- Minnesota
- Competitors
Minnesota's Image vs. The Competition — Worry Free

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>Category</th>
<th>Minnesota</th>
<th>Competitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worry Free</td>
<td>57</td>
<td>56</td>
</tr>
<tr>
<td>Good place to relax</td>
<td>57</td>
<td>56</td>
</tr>
</tbody>
</table>

Percent Who Strongly Agree

- Minnesota
- Competitors
Minnesota’s Image vs. The Competition — Luxury

Base: Residents of Minnesota’s Regional Advertising Markets

- Luxury
  - Minnesota: 55%
  - Competitors: 48%

- Excellent resorts/cabins/cottages
  - Minnesota: 60%
  - Competitors: 51%

- First class hotels
  - Minnesota: 50%
  - Competitors: 46%
Minnesota's Image vs. The Competition — Sightseeing

Base: Residents of Minnesota’s Regional Advertising Markets

- Lots to see and do
- Interesting small towns/cities
- Truly beautiful scenery
- Excellent national/state parks
- Authentic historical sites
- Beautiful fall color scenery
- Good for viewing wildlife/birds
- Great wilderness areas
- Four amazing seasons
- Rich Native American culture

Percent Who Strongly Agree

<table>
<thead>
<tr>
<th>Feature</th>
<th>Minnesota</th>
<th>Competitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lots to see and do</td>
<td>56%</td>
<td>51%</td>
</tr>
<tr>
<td>Interesting small towns/cities</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>Truly beautiful scenery</td>
<td>61%</td>
<td>62%</td>
</tr>
<tr>
<td>Excellent national/state parks</td>
<td>50%</td>
<td>59%</td>
</tr>
<tr>
<td>Authentic historical sites</td>
<td>40%</td>
<td>51%</td>
</tr>
<tr>
<td>Beautiful fall color scenery</td>
<td>72%</td>
<td>62%</td>
</tr>
<tr>
<td>Good for viewing wildlife/birds</td>
<td>59%</td>
<td>62%</td>
</tr>
<tr>
<td>Great wilderness areas</td>
<td>60%</td>
<td>62%</td>
</tr>
<tr>
<td>Four amazing seasons</td>
<td>56%</td>
<td>62%</td>
</tr>
<tr>
<td>Rich Native American culture</td>
<td>55%</td>
<td>55%</td>
</tr>
</tbody>
</table>
Minnesota's Image vs. The Competition — Entertainment

Base: Residents of Minnesota’s Regional Advertising Markets

- Entertainment: 34% (Minnesota) vs. 41% (Competitors)
- Interesting festivals/fairs/events: 39% (Minnesota) vs. 47% (Competitors)
- Exciting nightlife: 33% (Minnesota) vs. 36% (Competitors)
- Excellent museums/art galleries: 34% (Minnesota) vs. 40% (Competitors)
- Excellent shopping: 37% (Minnesota) vs. 58% (Competitors)
- Excellent wineries and breweries: 30% (Minnesota) vs. 32% (Competitors)
- Great for theater and the performing arts: 28% (Minnesota) vs. 37% (Competitors)

Percent Who Strongly Agree
Minnesota's Image vs. The Competition — Sports & Recreation

Base: Residents of Minnesota’s Regional Advertising Markets

Sports & Recreation

- Good place for camping: 63%
- Great bicycling/mountain biking: 61%
- Excellent canoeing/kayaking: 57%
- Great hiking: 56%
- Great for boating/water sports: 68%
- Excellent fishing: 74%
- Exciting spectator sporting events: 68%
- Excellent snow skiing/snowboarding/cross country: 71%
- Great snowmobiling: 71%
- Great for golfers: 63%
- Excellent hunting: 63%

Percent Who Strongly Agree

- Minnesota
- Competitors
Minnesota's Image vs. The Competition — Affordable

Base: Residents of Minnesota’s Regional Advertising Markets

Affordable

Affordable accommodations

Percent Who Strongly Agree

Minnesota

Competitors

47

45

47

45

Minnesota

Competitors

37
Minnesota's Image Strengths vs. the Competition

Base: Residents of Minnesota's Regional Advertising Markets

Circled attributes are image hot buttons.
Minnesota's Image Weaknesses vs. the Competition

Base: Residents of Minnesota’s Regional Advertising Markets

-11 vs. the Competition
-10
-8
-8
-7
-6
-6
-6
-4
-3
0

Authentic historical sites
Rich Native American culture
Excellent national/state parks
Unique vacation experience
Must-see destination
Vacation there is a real adventure
Great hiking
Popular with vacationers
Great bicycling/mountain biking
An exciting place

Difference in Percent Who Strongly Agree

Circled attributes are image hot buttons
Minnesota’s Product Delivery
Minnesota’s Product vs. Image

Base: Residents of Minnesota’s Regional Advertising Markets

Percent Who Strongly Agree

- Exciting: Recent Visitors 50, Never Visited 33
- Unique: Recent Visitors 45, Never Visited 34
- Adult Vacation: Recent Visitors 63, Never Visited 43
- Popular: Recent Visitors 48, Never Visited 31
- Family Atmosphere: Recent Visitors 55, Never Visited 39
- Worry Free: Recent Visitors 64, Never Visited 51
- Luxury: Recent Visitors 63, Never Visited 46
- Sightseeing: Recent Visitors 63, Never Visited 48
- Entertainment: Recent Visitors 65, Never Visited 29
- Sports and Recreation: Recent Visitors 65, Never Visited 47
- Affordable: Recent Visitors 50, Never Visited 45

* Visited in past two years
Minnesota’s Product Delivery vs. Image — Exciting

Base: Regional Market

Percent Who Strongly Agree

- Exciting: 50%
- A fun place for vacation: 38%
- Must-see destination: 46%
- An exciting place: 48%
- Vacation there is a real adventure: 47%

* Visited in past two years
Minnesota’s Product Delivery vs. Image — Unique

Base: Regional Market

<table>
<thead>
<tr>
<th></th>
<th>Unique</th>
<th>Unique vacation experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recent Visitors*</td>
<td>45</td>
<td>45</td>
</tr>
<tr>
<td>Never Visited</td>
<td>34</td>
<td>34</td>
</tr>
</tbody>
</table>

Percent Who Strongly Agree

* Visited in past two years
Minnesota’s Product Delivery vs. Image — Adult Vacation

Base: Regional Market

Percent Who Strongly Agree

**Adult Vacation**
- Recent Visitors: 63%
- Never Visited: 43%

**Good for adult vacation**
- Recent Visitors: 63%
- Never Visited: 43%

* Visited in past two years
Minnesota’s Product Delivery vs. Image — Popular

Base: Regional Market

Percent Who Strongly Agree

- **Popular**
  - Recent Visitors: 48%
  - Never Visited: 31%

- **Popular with vacationers**
  - Recent Visitors: 48%
  - Never Visited: 31%

*Visited in past two years*
Minnesota’s Product Delivery vs. Image — Family Atmosphere

**Base: Regional Market**

![Bar Chart]

**Family Atmosphere**
- Recent Visitors*: 55%
- Never Visited: 39%

**Children would enjoy**
- Recent Visitors*: 55%
- Never Visited: 39%

* Visited in past two years
Minnesota’s Product Delivery vs. Image — Worry Free

Base: Regional Market

<table>
<thead>
<tr>
<th></th>
<th>Recent Visitors*</th>
<th>Never Visited</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worry Free</td>
<td>64</td>
<td>51</td>
</tr>
<tr>
<td>Good place to relax</td>
<td>64</td>
<td>51</td>
</tr>
</tbody>
</table>

* Visited in past two years
Minnesota’s Product Delivery vs. Image — Luxury

Base: Regional Market

Percent Who Strongly Agree

- **Luxury**
  - Recent Visitors*: 63%
  - Never Visited: 46%

- **Excellent resorts/cabins/cottages**
  - Recent Visitors*: 68%
  - Never Visited: 48%

- **First class hotels**
  - Recent Visitors*: 58%
  - Never Visited: 43%

* Visited in past two years
Minnesota’s Product Delivery vs. Image — Sightseeing

Base: Regional Market

Percent Who Strongly Agree

- Recent Visitors*
- Never Visited

- Sightseeing
- Lots to see and do
- Interesting small towns/cities
- Truly beautiful scenery
- Excellent national/state parks
- Authentic historical sites
- Beautiful fall color scenery
- Good for viewing wildlife/birds
- Great wilderness areas
- Four amazing seasons
- Rich Native American culture

* Visited in past two years
Minnesota’s Product Delivery vs. Image — Entertainment

Base: Regional Market

- **Entertainment**: 52% of Recent Visitors vs. 29% of Never Visited
- **Interesting festivals/fairs/events**: 59% of Recent Visitors vs. 33% of Never Visited
- **Exciting nightlife**: 50% of Recent Visitors vs. 22% of Never Visited
- **Excellent museums/art galleries**: 68% of Recent Visitors vs. 26% of Never Visited
- **Excellent shopping**: 52% of Recent Visitors vs. 26% of Never Visited
- **Excellent wineries and breweries**: 52% of Recent Visitors vs. 23% of Never Visited
- **Great for theater and the performing arts**: 52% of Recent Visitors vs. 23% of Never Visited

* Percent Who Strongly Agree

* Visited in past two years
Minnesota’s Product Delivery vs. Image — Sports and Recreation

Base: Regional Market

Percent Who Strongly Agree

- Recent Visitors*
- Never Visited

Sports and Recreation
- Good place for camping: 65%
- Great bicycling/mountain biking: 56%
- Excellent canoeing/kayaking: 49%
- Great hiking: 57%
- Great for boating/water sports: 76%
- Excellent fishing: 65%
- Exciting spectator sporting events: 82%
- Excellent snow skiing/snowboarding/cross-country skiing: 75%
- Great snowmobiling: 75%
- Great for golfers: 71%
- Excellent hunting: 71%

* Visited in past two years
Minnesota’s Product Delivery vs. Image — Affordable

Base: Regional Market

* Visited in past two years
Great for theater and the performing arts
Interesting festivals/fairs/events
Great for boating/water sports
Excellent museums/art galleries
Lots to see and do
Excellent shopping
Four amazing seasons
Exciting nightlife
Great for golfers
Excellent canoeing/kayaking
Excellent fishing
A fun place for vacation
Exciting spectator sporting events

Circled attributes are image hot buttons
Minnesota’s Main Product Strengths vs. Image

Base: Residents of Minnesota’s Regional Advertising Markets

Difference in % Who Strongly Agree – Recent vs. Non-visitors

Circled attributes are image hot buttons
Minnesota’s Main Product Strengths vs. Image

Base: Residents of Minnesota’s Regional Advertising Markets

- Authentic historical sites: 13
- Great wilderness areas: 13
- Good place to relax: 13
- Interesting small towns/cities: 12
- Great hiking: 12
- Excellent snow skiing/snowboarding/cross: 12
- Vacation there is a real adventure: 12
- Unique vacation experience: 12
- Excellent wineries and breweries: 11
- Great bicycling/mountain biking: 11
- Excellent national/state parks: 10
- Truly beautiful scenery: 10
- Affordable accommodations: 6

Circled attributes are image hot buttons

Difference in % Who Strongly Agree – Recent vs. Non-visitors
Minnesota’s Product Weaknesses vs. Image

No Product Weaknesses vs. Image
Creative
2013 Spring/Summer Ads
Impact of Advertising on Image
Impact of Advertising on Image – Total Regional Market

Base: Residents of Minnesota’s Regional Advertising Markets

**Percent Who Strongly Agree**

<table>
<thead>
<tr>
<th>Feature</th>
<th>Aware*</th>
<th>Unaware</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exciting</td>
<td>48</td>
<td>34</td>
</tr>
<tr>
<td>Unique</td>
<td>48</td>
<td>31</td>
</tr>
<tr>
<td>Adult Vacation</td>
<td>52</td>
<td>40</td>
</tr>
<tr>
<td>Popular</td>
<td>50</td>
<td>38</td>
</tr>
<tr>
<td>Family Atmosphere</td>
<td>52</td>
<td>40</td>
</tr>
<tr>
<td>Worry Free</td>
<td>52</td>
<td>40</td>
</tr>
<tr>
<td>Luxury</td>
<td>59</td>
<td>49</td>
</tr>
<tr>
<td>Sightseeing</td>
<td>59</td>
<td>49</td>
</tr>
<tr>
<td>Entertainment</td>
<td>61</td>
<td>50</td>
</tr>
<tr>
<td>Sports and Recreation</td>
<td>52</td>
<td>43</td>
</tr>
<tr>
<td>Affordable</td>
<td>50</td>
<td>43</td>
</tr>
</tbody>
</table>

*Saw at least one ad*
Impact of Advertising on Minnesota’s Hot Buttons

A fun place for a vacation: 57% Aware*, 56% Unaware
Lots of things to see and do: 56% Aware*, 53% Unaware
Must-see destination: 57% Aware*, 43% Unaware
An exciting place: 47% Aware*, 44% Unaware
Unique vacation experience: 48% Aware*, 43% Unaware
A vacation there is a real adventure: 59% Aware*, 57% Unaware
Great for an adult vacation: 59% Aware*, 50% Unaware
Popular with vacationers: 52% Aware*, 45% Unaware
Children would enjoy: 52% Aware*, 34% Unaware
Good place to relax: 60% Aware*, 40% Unaware
Interesting small towns/cities: 54% Aware*, 51% Unaware
Interesting festivals/fairs/events: 54% Aware*, 51% Unaware
Truly beautiful scenery: 55% Aware*, 51% Unaware
Excellent resorts/cabins/cottages: 55% Aware*, 54% Unaware
First class hotels: 55% Aware*, 54% Unaware

Base: Residents of Minnesota’s Regional Advertising Markets

* Saw at least one ad
Information Sources for Trip Planning
Information Sources Used for Trip Planning After Seeing Ads

Base: Regional Market

- www.exploreminnesota.com: 8%
- Hotel websites: 7%
- A hotel or resort: 7%
- Advice from relatives or friends: 6%
- Personal experience from past visit(s): 6%
- Travel guide books: 6%
- Magazine advertising: 5%
- Television advertising: 5%
- Social Media (e.g. Facebook, Twitter): 5%
- Travel articles in magazines: 4%
- Other online sources: 4%
- A local visitors bureau/ of commerce chamber of: 3%
- Other destination websites: 3%
Information Sources Used for Trip Planning After Seeing Ads (Cont’d)

Base: Regional Market

- Newspaper travel section: 3
- Television travel shows: 2
- Newspaper advertising: 2
- Online booking engines (e.g. Expedia): 2
- Airline websites: 2
- A travel agent: 2
- Radio advertising: 2
- A toll-free number: 2
- A government tourism office: 2
- Car rental websites: 2
- An airline/commercial carrier: 1
- Radio travel shows: 1
- Other magazine articles: 1

Percent
### Information Sources Used for Trip Planning After Seeing Ads (Cont’d)

<table>
<thead>
<tr>
<th>Information Sources</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>A company that specializes in group tours</td>
<td>1</td>
</tr>
<tr>
<td>Advertorials</td>
<td>1</td>
</tr>
<tr>
<td>Other newspaper articles</td>
<td>1</td>
</tr>
<tr>
<td>An auto club</td>
<td>1</td>
</tr>
<tr>
<td>Editorials</td>
<td>1</td>
</tr>
<tr>
<td>Other books</td>
<td>1</td>
</tr>
<tr>
<td>Other information from radio</td>
<td>1</td>
</tr>
<tr>
<td>An association/club</td>
<td>0</td>
</tr>
<tr>
<td>Other information from television</td>
<td>0</td>
</tr>
</tbody>
</table>

Base: Regional Market
Do you recall visiting the Travel Website www.exploreminnesota.com?

Base: Regional Market

84.9%

15.1%

Yes  No
At what point in your trip planning process did you visit www.exploreminnesota.com?

Base: Those who visited www.exploreminnesota.com

- To consider Minnesota as a travel destination: 48%
- To research my planned Minnesota trip: 40%
- Other: 12%

Percent
How many times did you visit www.exploreminnesota.com in 2013?

Base: Those who visited www.exploreminnesota.com

- Once: 23
- 2-4 times: 57
- 5-7 times: 12
- 8-10 times: 5
- More than 10 times: 3
What did you use the website www.exploremn.com for?

Base: Those who visited www.exploremn.com

- To seek information on Minnesota Events: 69%
- To look for general information on travel opportunities in Minnesota: 48%
- To find lodging: 36%
- To find information on dining: 32%
- To look for travel packages: 31%
- To prepare your Minnesota travel itinerary: 31%
- To enter a sweepstakes: 13%
How did you learn about the [www.exploreminnesota.com](http://www.exploreminnesota.com) website?

Base: Those who visited www.exploreminnesota.com

- Internet search engine: 52%
- Advertisement/commercials about Minnesota: 28%
- Family/friends: 25%
- Internet advertising: 20%
- Newspaper/magazine articles and TV programs: 19%
- Travel brochures/Guides: 13%
- Link from another website: 13%
- Social Media (e.g. Facebook, Twitter, Instagram): 9%
- Travel agent: 7%
- Other: 7%
How did you typically reach the www.exploreminnesota.com website?

Base: Those who used internet search to reach www.exploreminnesota.com

- Typed www.exploreminnesota.com in the browser’s address bar: 44%
- Typed “Minnesota” or Minnesota travel-related term or phrase in the search field: 41%
- Don’t recall: 15%
How useful was the www.exploreminnesota.com website?

Base: Those who visited www.exploreminnesota.com

- Very useful: 60%
- Somewhat useful: 39%
- Not very useful: 1%
Bottom Line Advertising Impacts
Advertising Impacts

- 57% of all respondents were aware of at least one of Explore Minnesota Tourism’s ads.
- Among those who saw Minnesota ads in several types of media, ad recall was highest for television ads (47%), followed by digital (43%). Among those who only saw ads in one medium, TV ads had the highest recall (11%), followed by digital (7%).
- The campaign generated 1.9 million incremental trips that would not otherwise have taken place, which brought $196 million in incremental visitor spending and $18.6 million in state and local taxes.
- 1 million incremental trips were overnight trips and 0.9 million were day trips.
- It cost $1.21 in advertising to generate each incremental trip.
- Every $1 invested in the Minnesota ad campaign in the evaluated markets generated $84 in visitor spending and $8 in tax revenue for the benefit of Minnesota residents.
Incremental Trips, Spending and Taxes Due to Advertising

<table>
<thead>
<tr>
<th></th>
<th>2013 Ad Campaign</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ad Investment</td>
<td>$2.3M</td>
</tr>
<tr>
<td>Incremental Trips</td>
<td>1.9M</td>
</tr>
<tr>
<td>Incremental Visitor Spending</td>
<td>$196.1M</td>
</tr>
<tr>
<td>Incremental Taxes</td>
<td>$18.6M</td>
</tr>
</tbody>
</table>

- Ad Investment includes Production/Fulfillment/Other Costs
- Effective tax rates developed from 2012 MN Adv. Impact Report = 3.5% Local and 6.0% State
## Incremental Trips Due to Advertising

<table>
<thead>
<tr>
<th></th>
<th>2013 Ad Campaign</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overnight Trips</td>
<td>1,020,144</td>
</tr>
<tr>
<td>Day Trips</td>
<td>899,066</td>
</tr>
<tr>
<td>Total</td>
<td>1,919,210</td>
</tr>
</tbody>
</table>
# Campaign Efficiency

<table>
<thead>
<tr>
<th></th>
<th>2013 Ad Campaign</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ad $’s per Trip</td>
<td>$1.21</td>
</tr>
<tr>
<td>Trips per Ad $</td>
<td>0.8</td>
</tr>
</tbody>
</table>
## The Bottom Line in 2013

<table>
<thead>
<tr>
<th></th>
<th>2013 Ad Campaign</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spending ROI</td>
<td>$84</td>
</tr>
<tr>
<td>Tax ROI</td>
<td>$8</td>
</tr>
</tbody>
</table>
## Longer-term Impact of Advertising – Intent to Visit Minnesota

<table>
<thead>
<tr>
<th></th>
<th>Intend to Visit Minnesota in next 12 months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overnight Trip Intenders</td>
<td>588,465</td>
</tr>
<tr>
<td>Day Trip Intenders</td>
<td>438,971</td>
</tr>
<tr>
<td>Total Intenders</td>
<td>1,027,436</td>
</tr>
</tbody>
</table>

* Among those who did not visit Minnesota in 2013
Minnesota Media Diagnostics
Definition of Awareness
Total Impressions by Media

Base: Regional Market

**Media Spend:**
- **TV**: $1,026,196
- **Digital**: $653,638
- **Radio**: $85,500
- **Print**: $38,900

![Bar Chart showing media impressions and spend](image)