Minnesota
2015 Tourism Advertising Evaluation and Image Study
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Background

- Longwoods International was engaged by Explore Minnesota Tourism to undertake an evaluation of their spring/summer 2015 tourism advertising campaign.
- The campaign employed TV, Print, Digital, Radio, Out-of-Home and Social Media
- The ads were designed to:
  - Promote leisure travel to Minnesota
  - Promote consumer engagement through the “Only in MN” hashtag
- Minnesota’s regional advertising markets included:
  - Minnesota, North Dakota, South Dakota, Illinois, Iowa, Wisconsin, Colorado, Missouri, Montana, Nebraska, Wyoming, Kansas and Winnipeg, Manitoba, Canada
- Campaign spending totaled $4.5 million.
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 2015 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 2015 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.
Image Study 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.
Travel Motivators

- 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.
For travelers, the top motivators for getting on the destination wish list are **exciting**, followed by **adult vacation** and **popular**:

- **the notion of excitement** comes from being seen as fun, with a sense of adventure and a must-see destination.
- **adult vacation**, the perceived suitability for adults and couples, is important because they are paying for the trip.
- **popularity** as a tourist destination in general.
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:

- **uniqueness**, including the local people, culture and traditions
- **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
- the opportunities for **entertainment**, including festivals, nightlife, shopping, museums and theater
- **good sightseeing**, particularly the overall variety of things to see and do, and beautiful scenery
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 Competitive Set includes North Dakota, South Dakota, Wisconsin, Michigan, Colorado and Illinois

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 and hunting
- Urban experiences such as excellent shopping and great theater & performing arts
- Exciting spectator sporting events
Nonetheless, travelers perceive some disadvantages to visiting Minnesota relative to the competition, the most important of which are two hot buttons:

- *not considered a must-see destination*
- *not as exciting as other destinations*

And one less critical area:

- *authentic historical sites*
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”.

Minnesota’s Product Delivery
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 it is clear that Minnesota’s product delivers, consistently exceeding visitor expectations. 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 and first-class hotels
- 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 and exciting place for a vacation, a place with lots to see and do for both adults and children, a unique, must-see destination
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 a destination is a place “I would really enjoy visiting.”
### Top 15 Hot Buttons

<table>
<thead>
<tr>
<th>Hot Button</th>
</tr>
</thead>
<tbody>
<tr>
<td>A fun place for a vacation</td>
</tr>
<tr>
<td>Must-see destination</td>
</tr>
<tr>
<td>An exciting place</td>
</tr>
<tr>
<td>Good for adult vacation</td>
</tr>
<tr>
<td>Lots to see and do</td>
</tr>
<tr>
<td>Vacation there is a real adventure</td>
</tr>
<tr>
<td>Popular with vacationers</td>
</tr>
<tr>
<td>Unique vacation experience</td>
</tr>
<tr>
<td>Interesting festivals/fairs/events</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>Truly beautiful scenery</td>
</tr>
<tr>
<td>Exciting nightlife</td>
</tr>
<tr>
<td>First class hotels</td>
</tr>
</tbody>
</table>

Base: Residents of Minnesota’s Regional Advertising Markets
Minnesota's Image vs. Competitors
Minnesota's Overall Image

Base: Residents of Minnesota’s Regional Advertising Markets

- Exciting: 38%
- Adult Vacation: 49%
- Popular: 40%
- Unique: 40%
- Family Atmosphere: 44%
- Worry Free: 51%
- Luxury: 48%
- Entertainment: 38%
- Sightseeing: 52%
- Sports and Recreation: 52%
- Affordable: 39%
Minnesota's Overall Image vs. Competitors

Base: Residents of Minnesota’s Regional Advertising Markets

- Percent Who Strongly Agree
  - Exciting
  - Adult Vacation
  - Popular
  - Unique
  - Family Atmosphere
  - Worry Free
  - Luxury
  - Entertainment
  - Sightseeing
  - Sports and Recreation
  - Affordable

Competitors include: North Dakota, South Dakota, Colorado, Illinois, Michigan, Wisconsin
Minnesota's Image vs. Competitors — Exciting

Base: Residents of Minnesota’s Regional Advertising Markets

- Exciting: 38% Minnesota, 41% Competitors
- A fun place for vacation: 47% Minnesota, 46% Competitors
- Must-see destination: 34% Minnesota, 40% Competitors
- An exciting place: 31% Minnesota, 36% Competitors
- Vacation there is a real adventure: 38% Minnesota, 41% Competitors

Percent Who Strongly Agree

- Minnesota
- Competitors
Minnesota's Image vs. Competitors — Adult Vacation

Base: Residents of Minnesota’s Regional Advertising Markets

- Adult Vacation
  - Minnesota: 49%
  - Competitors: 51%

- Good for an adult vacation
  - Minnesota: 49%
  - Competitors: 51%
Minnesota's Image vs. Competitors — Popular

Base: Residents of Minnesota’s Regional Advertising Markets

- Popular
- Popular with vacationers

Percent Who Strongly Agree

- Minnesota
- Competitors
Minnesota's Image vs. Competitors — Unique

Base: Residents of Minnesota’s Regional Advertising Markets

Unique

Unique vacation experience

Percent Who Strongly Agree

Minnesota
Competitors

0 20 40 60 80 100

30
Minnesota's Image vs. Competitors — Family Atmosphere

Base: Residents of Minnesota’s Regional Advertising Markets

- Family Atmosphere
  - Minnesota: 44%
  - Competitors: 43%

- Children would enjoy
  - Minnesota: 44%
  - Competitors: 43%
Minnesota's Image vs. Competitors — Worry Free

Base: Residents of Minnesota’s Regional Advertising Markets

Percent Who Strongly Agree

- **Worry Free**
  - Minnesota: 53%
  - Competitors: 51%

- **Good place to relax**
  - Minnesota: 53%
  - Competitors: 51%
Minnesota’s Image vs. Competitors — Luxury

Base: Residents of Minnesota’s Regional Advertising Markets

- **Luxury**
  - Minnesota: 48%
  - Competitors: 46%

- **First class hotels**
  - Minnesota: 43%
  - Competitors: 43%

- **Excellent resorts/cabins/cottages**
  - Minnesota: 53%
  - Competitors: 49%
Minnesota's Image vs. Competitors — Entertainment

Base: Residents of Minnesota’s Regional Advertising Markets

- Entertainment
  - Minnesota: 35%
  - Competitors: 38%

- Interesting festivals/fairs/events
  - Minnesota: 39%
  - Competitors: 42%

- Exciting nightlife
  - Minnesota: 34%
  - Competitors: 33%

- Excellent museums/art galleries
  - Minnesota: 36%
  - Competitors: 36%

- Excellent wineries and breweries
  - Minnesota: 31%
  - Competitors: 30%

- Great for theater and the performing arts
  - Minnesota: 37%
  - Competitors: 36%

- Excellent shopping
  - Minnesota: 50%
  - Competitors: 31%
Minnesota's Image vs. Competitors — Sightseeing

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>Lots to see and do</td>
<td>44</td>
<td>46</td>
</tr>
<tr>
<td>Interesting small towns/cities</td>
<td>48</td>
<td>47</td>
</tr>
<tr>
<td>Truly beautiful scenery</td>
<td>56</td>
<td>59</td>
</tr>
<tr>
<td>Excellent national/state parks</td>
<td>50</td>
<td>52</td>
</tr>
<tr>
<td>Authentic historical sites</td>
<td>40</td>
<td>48</td>
</tr>
<tr>
<td>Great wilderness areas</td>
<td>48</td>
<td>59</td>
</tr>
<tr>
<td>Good for viewing wildlife/birds</td>
<td>57</td>
<td>56</td>
</tr>
<tr>
<td>Beautiful fall color scenery</td>
<td>53</td>
<td>59</td>
</tr>
<tr>
<td>Four amazing seasons</td>
<td>51</td>
<td>59</td>
</tr>
<tr>
<td>Rich Native American culture</td>
<td>47</td>
<td>48</td>
</tr>
</tbody>
</table>

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

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>Activity</th>
<th>Minnesota</th>
<th>Competitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Great bicycling/mountain biking</td>
<td>46</td>
<td>52</td>
</tr>
<tr>
<td>Great hiking</td>
<td>44</td>
<td>50</td>
</tr>
<tr>
<td>Good place for camping</td>
<td>40</td>
<td>48</td>
</tr>
<tr>
<td>Excellent canoeing/kayaking</td>
<td>39</td>
<td>44</td>
</tr>
<tr>
<td>Exciting spectator sporting events</td>
<td>41</td>
<td>52</td>
</tr>
<tr>
<td>Great for golfers</td>
<td>35</td>
<td>55</td>
</tr>
<tr>
<td>Excellent snow skiing/snowboarding/cross country...</td>
<td>50</td>
<td>60</td>
</tr>
<tr>
<td>Great for boating/water sports</td>
<td>41</td>
<td>62</td>
</tr>
<tr>
<td>Great snowmobiling</td>
<td>41</td>
<td>62</td>
</tr>
<tr>
<td>Excellent fishing</td>
<td>50</td>
<td>64</td>
</tr>
<tr>
<td>Excellent hunting</td>
<td>50</td>
<td>56</td>
</tr>
</tbody>
</table>

Percent Who Strongly Agree
Minnesota's Image vs. Competitors — Affordable

Base: Residents of Minnesota’s Regional Advertising Markets

Affordable

Affordable accommodations

Percent Who Strongly Agree

- Minnesota
- Competitors
Minnesota's Image Strengths vs. Competitors

Base: Residents of Minnesota’s Regional Advertising Markets

- Great for boating/water sports: 18
- Excellent fishing: 14
- Excellent shopping: 13
- Excellent canoeing/kayaking: 8
- Excellent hunting: 6
- Great snowmobiling: 6
- Great for theater and the performing arts: 5
- Exciting spectator sporting events: 5

Difference in Percent Who Strongly Agree
Minnesota's Image Weaknesses vs. Competitors

Base: Residents of Minnesota’s Regional Advertising Markets

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

<table>
<thead>
<tr>
<th>Feature</th>
<th>Recent Visitors*</th>
<th>Never Visited</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exciting</td>
<td>47</td>
<td>31</td>
</tr>
<tr>
<td>Adult Vacation</td>
<td>61</td>
<td>38</td>
</tr>
<tr>
<td>Popular</td>
<td>47</td>
<td>35</td>
</tr>
<tr>
<td>Unique</td>
<td>49</td>
<td>36</td>
</tr>
<tr>
<td>Family Atmosphere</td>
<td>59</td>
<td>34</td>
</tr>
<tr>
<td>Worry Free</td>
<td>62</td>
<td>43</td>
</tr>
<tr>
<td>Luxury</td>
<td>60</td>
<td>37</td>
</tr>
<tr>
<td>Entertainment</td>
<td>50</td>
<td>29</td>
</tr>
<tr>
<td>Sightseeing</td>
<td>64</td>
<td>43</td>
</tr>
<tr>
<td>Sports and Recreation</td>
<td>62</td>
<td>43</td>
</tr>
<tr>
<td>Affordable</td>
<td>49</td>
<td>35</td>
</tr>
</tbody>
</table>

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

Base: Residents of Minnesota’s Regional Advertising Markets

---

**Exciting**
- Percent Who Strongly Agree:
  - Recent Visitors: 47%
  - Never Visited: 31%

**A fun place for vacation**
- Percent Who Strongly Agree:
  - Recent Visitors: 61%
  - Never Visited: 35%

**Must-see destination**
- Percent Who Strongly Agree:
  - Recent Visitors: 40%
  - Never Visited: 30%

**An exciting place**
- Percent Who Strongly Agree:
  - Recent Visitors: 41%
  - Never Visited: 26%

**Vacation there is a real adventure**
- Percent Who Strongly Agree:
  - Recent Visitors: 46%
  - Never Visited: 34%

* Visited in past two years

---
Minnesota’s Product Delivery vs. Image — Adult Vacation

Base: Residents of Minnesota’s Regional Advertising Markets

Adult Vacation
- Recent Visitors: 61%
- Never Visited: 38%

Good for adult vacation
- Recent Visitors: 61%
- Never Visited: 38%

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

Base: Residents of Minnesota’s Regional Advertising Markets

Percent Who Strongly Agree

Popular
- Recent Visitors: 47%
- Never Visited: 35%

Popular with vacationers
- Recent Visitors: 47%
- Never Visited: 35%

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

Base: Residents of Minnesota’s Regional Advertising Markets

Unique

Unique vacation experience

Percent Who Strongly Agree

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

Base: Residents of Minnesota’s Regional Advertising Markets

- **Family Atmosphere**
  - Percent Who Strongly Agree
    - Recent Visitors: 59
    - Never Visited: 34

- **Children would enjoy**
  - Percent Who Strongly Agree
    - Recent Visitors: 59
    - Never Visited: 34

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

Base: Residents of Minnesota’s Regional Advertising Markets

- **Worry Free**
  - Recent Visitors: 62%
  - Never Visited: 43%

- **Good place to relax**
  - Recent Visitors: 62%
  - Never Visited: 43%

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

Base: Residents of Minnesota’s Regional Advertising Markets

Luxury

First class hotels

Excellent resorts/cabins/cottages

Percent Who Strongly Agree

Recent Visitors*  Never Visited

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

Base: Residents of Minnesota’s Regional Advertising Markets

- Entertainment
- Interesting festivals/fairs/events
- Exciting nightlife
- Excellent museums/art galleries
- Excellent wineries and breweries
- Great for theater and the performing arts
- Excellent shopping

- Percent Who Strongly Agree

Recent Visitors* | Never Visited
--- | ---
Entertainment | 50 | 29
Interesting festivals/fairs/events | 53 | 33
Exciting nightlife | 46 | 28
Excellent museums/art galleries | 47 | 27
Excellent wineries and breweries | 51 | 25
Great for theater and the performing arts | 64 | 25
Excellent shopping | 64 | 38

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

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>Sightseeing</th>
<th>Recent Visitors*</th>
<th>Never Visited</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lots to see and do</td>
<td>57</td>
<td>36</td>
</tr>
<tr>
<td>Interesting small towns/cities</td>
<td>60</td>
<td>39</td>
</tr>
<tr>
<td>Truly beautiful scenery</td>
<td>71</td>
<td>49</td>
</tr>
<tr>
<td>Excellent national/state parks</td>
<td>62</td>
<td>43</td>
</tr>
<tr>
<td>Authentic historical sites</td>
<td>71</td>
<td>54</td>
</tr>
<tr>
<td>Great wilderness areas</td>
<td>71</td>
<td>34</td>
</tr>
<tr>
<td>Good for viewing wildlife/birds</td>
<td>69</td>
<td>46</td>
</tr>
<tr>
<td>Beautiful fall color scenery</td>
<td>77</td>
<td>49</td>
</tr>
<tr>
<td>Four amazing seasons</td>
<td>66</td>
<td>54</td>
</tr>
<tr>
<td>Rich Native American culture</td>
<td>64</td>
<td>43</td>
</tr>
</tbody>
</table>

* Visited in past two years

Percent Who Strongly Agree
Minnesota’s Product Delivery vs. Image — Sports and Recreation

Base: Residents of Minnesota’s Regional Advertising Markets

- Sports and Recreation: 62% for Recent Visitors*, 43% for Never Visited
- Great bicycling/mountain biking: 60% for Recent Visitors*, 44% for Never Visited
- Great hiking: 64% for Recent Visitors*, 40% for Never Visited
- Excellent canoeing/kayaking: 64% for Recent Visitors*, 42% for Never Visited
- Good place for camping: 69% for Recent Visitors*, 46% for Never Visited
- Exciting spectator sporting events: 56% for Recent Visitors*, 33% for Never Visited
- Great for golfers: 59% for Recent Visitors*, 43% for Never Visited
- Excellent snow skiing/snowboarding/cross-country skiing: 73% for Recent Visitors*, 28% for Never Visited
- Great for boating/water sports: 73% for Recent Visitors*, 47% for Never Visited
- Great snowmobiling: 71% for Recent Visitors*, 48% for Never Visited
- Excellent fishing: 69% for Recent Visitors*, 52% for Never Visited
- Excellent hunting: 69% for Recent Visitors*, 52% for Never Visited

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

Base: Residents of Minnesota’s Regional Advertising Markets

Percent Who Strongly Agree

**Affordable**
- Recent Visitors: 49%
- Never Visited: 35%

**Affordable accommodations**
- Recent Visitors: 49%
- Never Visited: 35%

* Visited in past two years
Minnesota’s Main Product Strengths vs. Image

Base: Residents of Minnesota’s Regional Advertising Markets

- Excellent shopping
- A fun place for vacation
- Great for theater and the performing arts
- Great for boating/water sports
- Excellent resorts/cabins/cottages
- Children would enjoy
- Excellent fishing
- Excellent hunting
- Good for viewing wildlife/birds
- Good for adult vacation
- Exciting spectator sporting events
- Beautiful fall color scenery
- Good place for camping

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

Circled attributes are image hot buttons
Minnesota’s Main Product Strengths vs. Image (Cont’d)

Base: Residents of Minnesota’s Regional Advertising Markets

- Four amazing seasons: 22
- Great wilderness areas: 22
- Truly beautiful scenery: 22
- Excellent canoeing/kayaking: 21
- Lots to see and do: 21
- First class hotels: 21
- Great hiking: 21
- Interesting festivals/fairs/events: 20
- Interesting small towns/cities: 20
- Excellent museums/art galleries: 20
- Authentic historical sites: 19
- Great snowmobiling: 19
- Good place to relax: 19

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

Circled attributes are image hot buttons
Minnesota’s Main Product Strengths vs. Image (Cont’d)

Base: Residents of Minnesota’s Regional Advertising Markets

- Exciting nightlife: 19
- Excellent national/state parks: 18
- Rich Native American culture: 15
- Great for golfers: 15
- Excellent wineries and breweries: 15
- An exciting place: 15
- Affordable accommodations: 14
- Unique vacation experience: 14
- Vacation there is a real adventure: 12
- Excellent snow skiing/snowboarding/cross country: 12
- Popular with vacationers: 12
- Must-see destination: 9
- Great bicycling/mountain biking: 8

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

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

No Product Weaknesses vs. Image
Creative
2015 Spring/Summer Ads

- Board Meeting
- Day Spa
- Morning Commute
- Up Your Game

#ONLYinMN
Impact of Advertising on Image
Impact of Advertising on Image

Base: Residents of Minnesota’s Regional Advertising Markets

- Exciting: Aware 43%, Unaware 33%
- Adult Vacation: Aware 51%, Unaware 48%
- Popular: Aware 46%, Unaware 33%
- Unique: Aware 47%, Unaware 37%
- Family Atmosphere: Aware 53%, Unaware 40%
- Worry Free: Aware 52%, Unaware 49%
- Luxury: Aware 49%, Unaware 44%
- Entertainment: Aware 55%, Unaware 33%
- Sightseeing: Aware 55%, Unaware 49%
- Sports and Recreation: Aware 55%, Unaware 49%
- Affordable: Aware 44%, Unaware 35%

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

Base: Residents of Minnesota’s Regional Advertising Markets

- A fun place for vacation: 51% Aware, 42% Unaware
- Must-see destination: 37% Aware, 31% Unaware
- An exciting place: 37% Aware, 26% Unaware
- Good for adult vacation: 51% Aware, 49% Unaware
- Lots to see and do: 49% Aware, 39% Unaware
- Vacation there is a real adventure: 45% Aware, 32% Unaware
- Popular with vacationers: 46% Aware, 33% Unaware
- Unique vacation experience: 43% Aware, 37% Unaware
- Interesting festivals/fairs/events: 47% Aware, 37% Unaware
- Children would enjoy: 47% Aware, 40% Unaware
- Good place to relax: 53% Aware, 40% Unaware
- Interesting small towns/cities: 51% Aware, 46% Unaware
- Truly beautiful scenery: 63% Aware, 39% Unaware
- Exciting nightlife: 47% Aware, 39% Unaware
- First class hotels: 55% Aware, 47% Unaware

Percent Who Strongly Agree

Aware* | Unaware
---|---
63 | 39
55 | 47
51 | 46
53 | 40
51 | 46
47 | 37
43 | 37
46 | 33
46 | 32
49 | 26
49 | 31
51 | 37
51 | 37
61

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

Base: Residents of Minnesota’s Regional Advertising Markets

- A hotel or resort
- www.exploreminnesota.com
- Advice from relatives or friends
- Social Media (e.g. Facebook, Twitter)
- Hotel websites
- Personal experience from past visit(s)
- Travel guide books
- Other online sources
- A travel agent
- Online booking engines (e.g. Expedia)
- A local visitors bureau/chamber of commerce
- Television advertising

Percent

<table>
<thead>
<tr>
<th>Information Sources</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>A hotel or resort</td>
<td>10</td>
</tr>
<tr>
<td><a href="http://www.exploreminnesota.com">www.exploreminnesota.com</a></td>
<td>9</td>
</tr>
<tr>
<td>Advice from relatives or friends</td>
<td>8</td>
</tr>
<tr>
<td>Social Media (e.g. Facebook, Twitter)</td>
<td>7</td>
</tr>
<tr>
<td>Hotel websites</td>
<td>7</td>
</tr>
<tr>
<td>Personal experience from past visit(s)</td>
<td>7</td>
</tr>
<tr>
<td>Travel guide books</td>
<td>6</td>
</tr>
<tr>
<td>Other online sources</td>
<td>5</td>
</tr>
<tr>
<td>A travel agent</td>
<td>5</td>
</tr>
<tr>
<td>Online booking engines (e.g. Expedia)</td>
<td>4</td>
</tr>
<tr>
<td>A local visitors bureau/chamber of commerce</td>
<td>4</td>
</tr>
<tr>
<td>Television advertising</td>
<td>4</td>
</tr>
</tbody>
</table>
Information Sources Used for Trip Planning After Seeing Ads (Cont’d)

Base: Residents of Minnesota’s Regional Advertising Markets

- A government tourism office: 4
- Magazine advertising: 4
- An airline/commercial carrier: 3
- An auto club: 3
- Travel articles in magazines: 3
- Airline websites: 3
- Other destination websites: 3
- A company that specializes in group tours: 3
- Television travel shows: 3
- Radio advertising: 2
- A toll-free number: 2
- Other books: 2

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

Base: Residents of Minnesota’s Regional Advertising Markets

- Newspaper travel section: 2
- Newspaper advertising: 2
- Car rental websites: 2
- Radio travel shows: 2
- Other magazine articles: 1
- Editorials: 1
- An association/club: 1
- Other information from television: 1
- Other information from radio: 1
- Advertorials: 1
- Other newspaper articles: 1

Percent
Do you recall visiting the Travel Website www.exploreminnesota.com?

Base: Residents of Minnesota’s Regional Advertising Markets

- Yes: 7.6%
- No: 92.4%
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: 63%
- To research my planned Minnesota trip: 34%
- Other: 3%

Percent
How many times did you visit www.exploreminnesota.com in 2015?

Base: Those who visited www.exploreminnesota.com

- Once: 29
- 2-4 times: 53
- 5-7 times: 18
- 8-10 times: 1

Percent
What did you use the website www.exploreminnesota.com for?

Base: Those who visited www.exploreminnesota.com

- To seek information on Minnesota Events: 62%
- To find lodging: 46%
- To look for travel packages: 44%
- To prepare your Minnesota travel itinerary: 40%
- To look for general information on travel opportunities in Minnesota: 36%
- To find information on dining: 35%
- To enter a sweepstakes: 10%
How did you learn about the www.exploreminnesota.com website?

Base: Those who visited www.exploreminnesota.com

- Internet search engine: 56%
- Internet advertising: 48%
- Social Media (e.g. Facebook, Twitter, Instagram): 35%
- Family/friends: 34%
- Advertisement/commercials about Minnesota: 25%
- Travel agent: 22%
- Newspaper/magazine articles and TV programs: 22%
- Travel brochures/Guides: 16%
- Link from another website: 12%
- Other: 1%

Percent
How did you use the internet to reach the www.exploreminnesota.com website?

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

Typed "Minnesota" or Minnesota travel-related term or phrase in the search field: 68%

Typed www.exploreminnesota.com in the browser's address bar: 31%

Don't recall: 2%
How useful was the www.exploreminnesota.com website?

Base: Those who visited www.exploreminnesota.com

- Very useful: 75%
- Somewhat useful: 21%
- Not very useful: 2%
- Not at all useful: 2%
What actions did you take after seeing Minnesota Social Media Posts?

Base: Those aware of at least one EMT social media post

- Liked the FB fan page of EMT (28%)
- Liked, shared or commented on at least one FB post (24%)
- Liked or commented on at least one photo post on EMT Instagram page (15%)
- Followed EMT Twitter feed (14%)
- Retweeted, favorited or replied to at least one Twitter post (12%)
- Followed the EMT Instagram page (8%)
- Posted my own photos using #OnlyinMN (4%)
- Did not respond to any social media post (37%)
Bottom Line Advertising Impacts
Advertising Impacts

59% 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 (37%), followed by digital (31%). Among those who only saw ads in one medium, TV ads had the highest recall (9%), followed by digital (6%).

The campaign generated 3.2 million incremental trips that would not otherwise have taken place, which brought $337 million in incremental visitor spending and $31 million in state and local taxes.

1.6 million incremental trips were overnight trips and 1.6 million were day trips.

It cost $1.42 in advertising to generate each incremental trip.

Every $1 invested in the Minnesota ad campaign in the evaluated markets generated $75 in visitor spending and $7 in tax revenue for the benefit of Minnesota residents.

In addition to the short-term impacts, we estimate that the advertising has influenced the planning of a further 2.64 million trips to Minnesota in 2016. Although not all of these trips will happen, we expect that a sizeable proportion will convert, adding significantly to the return on Minnesota’s investment in tourism marketing.
Awareness of Minnesota’s Advertising

59%
Awareness by Media

- Any Ad: 59%
- TV: 37% (9% only, 28% + Other Media)
- Digital: 31% (6% only, 25% + Other Media)
- Out-Of-Home: 24% (2% only, 22% + Other Media)
- Print: 24% (1% only, 23% + Other Media)
- Radio: <1% (3% only, 0% + Other Media)
Incremental Trips, Spending and Taxes Due to Advertising

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Ad Investment</td>
<td>$ 4.5M</td>
</tr>
<tr>
<td>Incremental Trips</td>
<td>3.2M</td>
</tr>
<tr>
<td>Incremental Visitor Spending</td>
<td>$ 337.4M</td>
</tr>
<tr>
<td>Incremental Taxes</td>
<td>$ 31.2M</td>
</tr>
</tbody>
</table>

- Ad Investment includes Production/Fulfillment/Other Costs
- Effective tax rates developed from 2014 MN Adv. Impact Analysis: State (5.9%)+Local (3.3%) = 9.3%
### Incremental Trips Due to Advertising

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Overnight Trips</td>
<td>1,632,092</td>
</tr>
<tr>
<td>Day Trips</td>
<td>1,548,949</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>3,181,041</strong></td>
</tr>
</tbody>
</table>
## 2015 Campaign Efficiency

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Ad $’s per Trip</td>
<td>$1.42</td>
</tr>
<tr>
<td>Trips per Ad $</td>
<td>0.7</td>
</tr>
</tbody>
</table>
The Bottom Line in 2015

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Spending ROI</td>
<td>$75</td>
</tr>
<tr>
<td>Tax ROI</td>
<td>$7</td>
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</tbody>
</table>
Longer-term Impact of Advertising – Intent to Visit Minnesota

<table>
<thead>
<tr>
<th>Intend to Visit Minnesota in Next 12 Months*</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Overnight Trip Intenders</td>
<td>1,087,145</td>
</tr>
<tr>
<td>Day Trip Intenders</td>
<td>1,557,311</td>
</tr>
<tr>
<td>Total Intenders</td>
<td>2,644,456</td>
</tr>
</tbody>
</table>

* Among those who did not visit Minnesota in 2015
Minnesota Media Diagnostics
Definition of Awareness

TV Only

Digital Only

TV +

Both

Digital +
Awareness by Media

- **Any Ad**: 59%
- **TV**: 37% (Other Media: 9%, Only: 6%)
- **Digital**: 31% (Other Media: 6%, Only: 2%)
- **Out-Of-Home**: 24% (Other Media: 2%, Only: 2%)
- **Print**: 24% (Other Media: 1%, Only: 1%)
- **Radio**: 3% (Other Media: <1%, Only: <1%)
Total Impressions by Media

<table>
<thead>
<tr>
<th>Media</th>
<th>Impressions</th>
<th>Spend</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV</td>
<td>61.8</td>
<td>$1.42M</td>
</tr>
<tr>
<td>Digital</td>
<td>55.6</td>
<td>$1.35M</td>
</tr>
<tr>
<td>Out-Of-Home</td>
<td>25.8</td>
<td>$0.62M</td>
</tr>
<tr>
<td>Print</td>
<td>21.0</td>
<td>$0.39M</td>
</tr>
<tr>
<td>Radio</td>
<td>3.3</td>
<td>$0.08M</td>
</tr>
</tbody>
</table>
The “Halo Effect” of Minnesota’s tourism advertising on the state’s economic development image
Minnesota’s “Halo Effect”

- The following analysis takes the psychological concept of the “halo effect”, which posits that “our judgments of a person’s character can be influenced by our overall impression of them” and applies it to tourism promotion advertising.

- There is significant evidence that the gains in image from Minnesota’s tourism advertising extend beyond Minnesota’s image as a place to visit to other areas, such as a place to live, do business, attend college and retire.

- Minnesota’s success in attracting visitors to the state has a direct benefit for the state’s economic development objectives.
Impact of Minnesota’s 2015 Tourism Campaign on State’s Economic Development Image

- A good place to live: +46%
- A good place to start a career: +49%
- A good place to start a business: +60%
- A good place to attend college: +41%
- A good place to purchase a vacation home: +64%
- A good place to retire: +70%

Percent Who Strongly Agree

<table>
<thead>
<tr>
<th>Aware</th>
<th>Unaware</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>20</td>
</tr>
<tr>
<td>40</td>
<td>60</td>
</tr>
</tbody>
</table>
Impact of Visitation on Minnesota's Economic Development Image

- A good place to live: +87%
- A good place to start a career: +95%
- A good place to start a business: +110%
- A good place to attend college: +94%
- A good place to purchase a vacation home: +90%
- A good place to retire: +75%
“A Good Place to Live”

% Image Lift for Minnesota

- Advertising: 46%
- Visitation: 87%
- Advertising Plus Visitation: 134%

Percent
“A Good Place to Start a Career”

% Image Lift for Minnesota

- Advertising: 49
- Visitation: 95
- Advertising Plus Visitation: 148
“A Good Place to Start a Business”

% Image Lift for Minnesota

- Advertising: 60
- Visitation: 110
- Advertising Plus Visitation: 183

Percent
“A Good Place to Attend College”

% Image Lift for Minnesota

- Advertising: 41%
- Visitation: 94%
- Advertising Plus Visitation: 138%
“A Good Place to Purchase a Vacation Home”

% Image Lift for Minnesota

- Advertising: 64%
- Visitation: 90%
- Advertising Plus Visitation: 167%
“A Good Place to Retire”

% Image Lift for Minnesota

- Advertising: 70%
- Visitation: 75%
- Advertising Plus Visitation: 156%