Minnesota 2017 Advertising Evaluation and Image Study Report
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Appendix III: Minnesota Image & Product Delivery in Expansion Markets
In early 2017, Minnesota launched a new advertising campaign in key instate and out-of-state markets*.

The campaign consisted of both traditional and online media including:
- Broadcast and digital video.
- Broadcast and digital radio.
- Out-Of-Home, including ads on outdoor digital screens and billboards, and event installations.
- Print ads.
- Online banner ads, Facebook/social media ads and emails.

Longwoods was engaged to conduct a program of research designed to:
- Measure the effectiveness of the advertising campaign in bringing visitors to Minnesota during the campaign period and shortly thereafter, and increasing intentions to visit in the future.
- Estimate the return on advertising investment yielded by the campaign, in terms of incremental spending in Minnesota by those visitors, and incremental taxes generated by that spending.
- Through an analysis of Minnesota’s image, provide input into the development of positioning and messaging for future campaigns.

*Existing markets: MN, ND, SD, IA, WI, Northern IL, Winnipeg Canada
Expansion markets: CO, NE, Eastern KS, Western MO, Thunder Bay Canada
**Method**

✓ A benchmark study was conducted after the conclusion of the advertising period to measure awareness of specific ads, estimate the impact of advertising awareness on intentions to visit and image, and measure short-term conversion that occurred during and shortly after the campaign period.

✓ A national self-completion survey of 1,400 respondents in the advertising markets, distributed as follows:

<table>
<thead>
<tr>
<th>City</th>
<th>Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minnesota</td>
<td>135</td>
</tr>
<tr>
<td>North Dakota</td>
<td>30</td>
</tr>
<tr>
<td>South Dakota</td>
<td>30</td>
</tr>
<tr>
<td>Iowa</td>
<td>80</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>150</td>
</tr>
<tr>
<td>Winnipeg Canada</td>
<td>30</td>
</tr>
<tr>
<td>Northern Illinois</td>
<td>245</td>
</tr>
<tr>
<td>Colorado</td>
<td>280</td>
</tr>
<tr>
<td>Eastern Kansas</td>
<td>100</td>
</tr>
<tr>
<td>Western Missouri</td>
<td>195</td>
</tr>
<tr>
<td>Nebraska</td>
<td>115</td>
</tr>
<tr>
<td>Thunder Bay Canada</td>
<td>10</td>
</tr>
</tbody>
</table>

✓ Respondents are members of a major online consumer research panel.

✓ Adults 18 years of age and older were randomly selected from the panel, so as to ensure a representative sample.

✓ Sample was drawn to be proportionate to population by specific cities/regions, age, sex and income.
The survey took an average of 25 minutes to complete.

During the survey respondents were shown copies of the advertising materials, including video files of media-rich ads. This was done at the end of the survey so as not to bias earlier questions on attitudes towards Minnesota and other behavioral measures.

The fieldwork was conducted in November 2017.

Data were weighted on key demographic variables (region, age, sex, household income) prior to analysis to ensure that results are representative of and projectable to the traveler population in specific DMAs.

For a sample of this size, the confidence level is $+/- 2.5\%$, 19 times out of 20.
The estimates of the campaign’s impacts on visits and intentions to visit Minnesota are conservative in that:

- Trips taken/intended by people in the absence of advertising are backed out.

- Conservative control procedures help ensure that only advertising-influenced trips are included.

Unless otherwise noted, results shown are representative of all respondents surveyed (n=1,400 travelers).

“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.
Bottom Line Advertising Impacts
The campaign generated 3.3 million incremental trips that would not otherwise have taken place, which brought almost $384 million in incremental visitor spending and almost $37 million in state and local taxes.

It cost $1.25 in advertising to generate each incremental trip.

Every $1 invested in the Minnesota ad campaign in the evaluated markets generated $92 in visitor spending and $9 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 2.3 million trips to Minnesota in 2017 and 2018. 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.
## Incremental Trips, Spending and Taxes Due to Advertising

<table>
<thead>
<tr>
<th></th>
<th>Existing Markets</th>
<th>Expansion Markets</th>
<th>Combined</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ad Investment</td>
<td>$3.2M</td>
<td>$1.0M</td>
<td>$4.2M</td>
</tr>
<tr>
<td>Incremental Trips</td>
<td>2.9M</td>
<td>0.4M</td>
<td>3.3M</td>
</tr>
<tr>
<td>Incremental Visitor Spending</td>
<td>$341.6M</td>
<td>$42.3M</td>
<td>$383.9M</td>
</tr>
<tr>
<td>Incremental Taxes</td>
<td>$32.8M</td>
<td>$4.1M</td>
<td>$36.9M</td>
</tr>
</tbody>
</table>

- Ad Investment includes Production/Fulfillment/Other Costs
- Effective tax rates developed from 2016 MN Adv. Impact Analysis: State + Local = 9.6%
### Incremental Trips Due to Advertising

<table>
<thead>
<tr>
<th></th>
<th>Existing Markets</th>
<th>Expansion Markets</th>
<th>Combined</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overnight Trips</td>
<td>1,590,228</td>
<td>186,936</td>
<td>1,777,164</td>
</tr>
<tr>
<td>Day Trips</td>
<td>1,367,552</td>
<td>197,258</td>
<td>1,564,810</td>
</tr>
<tr>
<td>Total</td>
<td>2,957,780</td>
<td>384,194</td>
<td>3,341,974</td>
</tr>
</tbody>
</table>
### 2017 Campaign Efficiency

<table>
<thead>
<tr>
<th></th>
<th>Existing Markets</th>
<th>Expansion Markets</th>
<th>Combined</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ad $'s per Trip</td>
<td>$1.07</td>
<td>$2.69</td>
<td>$1.25</td>
</tr>
<tr>
<td>Trips per Ad $</td>
<td>0.9</td>
<td>0.4</td>
<td>0.8</td>
</tr>
</tbody>
</table>
### The Bottom Line in 2017

<table>
<thead>
<tr>
<th></th>
<th>Existing Markets</th>
<th>Expansion Markets</th>
<th>Combined</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spending ROI</td>
<td>$108</td>
<td>$41</td>
<td>$92</td>
</tr>
<tr>
<td>Tax ROI</td>
<td>$10</td>
<td>$4</td>
<td>$9</td>
</tr>
</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>1,237,132</td>
</tr>
<tr>
<td>Day Trip Intenders</td>
<td>1,058,658</td>
</tr>
<tr>
<td>Total Intenders</td>
<td>2,295,790</td>
</tr>
</tbody>
</table>

* Among those who did not visit Minnesota in 2017
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 12 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 **family atmosphere**:

- 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

- **family atmosphere** refers to a destination’s perceived appeal for kids and families
Several factors are of moderate importance individually; but they include some of the key features that bring to life the emotional excitement that attracts people to a destination:

- **uniqueness**, including the local people, culture and traditions
- good **sightseeing**, particularly the overall variety of things to see and do, and beautiful scenery
- the availability of **luxurious** accommodations and dining
- **popularity** as a tourist destination in general
- a **worry-free** environment, because being perceived as relaxed and friendly, as well as safe and welcoming is important
- the opportunities for **entertainment**, including festivals, nightlife, shopping, museums and theater
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

- **climate**
An analysis of Minnesota’s performance versus competitors in the broad travel motivator categories reveals the following:

Among the destinations evaluated in this study, **Colorado** emerged as the image leader, having the advantage over the others for being an exciting destination, suitability for an adult destination, family atmosphere, unique experience and customs, sightseeing and scenery, luxury accommodations and dining, popularity, sports and recreation activities, and overall climate.

Colorado was also given the highest rating for “a place I would really enjoy visiting” among the competitive destinations.

Minnesota is given the edge over Colorado in affordability.

Colorado and Minnesota were essentially tied in their ratings for entertainment, nightlife, and the arts, being an “Excellent Value for the Money” as well as being a worry-free, welcoming destination.
Wisconsin is another strong contender among the markets surveyed.

Wisconsin’s strongest suit relative to all of the destinations evaluated is for affordability and value for money. Wisconsin outperforms Minnesota on the broad categories of suitability for an adult vacation, family atmosphere, and popularity.

Wisconsin and Minnesota are statistically tied in the broad categories of excitement, uniqueness, sightseeing offerings, luxury, being worry-free, sports and recreation offerings, and overall climate.

On the other hand, Minnesota is considered better for shopping, theater, the arts, and fishing.
Illinois has a unique edge, taking the top spot for entertainment, including interesting festivals, art galleries and museums, shopping, and nightlife.

Illinois received slightly higher ratings than Minnesota on luxury, first-class hotels and restaurants, and being a well-known destination.

Illinois ties with Minnesota on its ratings as “A Place I’d Really Enjoy Visiting”, excitement, popularity, and overall suitability for an adult vacation.

Minnesota is considered better than Illinois for being an excellent value for the money and a worry-free destination; for family atmosphere, uniqueness, sightseeing, sports and recreation options, and affordability.
Michigan was generally ranked below Minnesota for many of the important image variables and factors:

- Rated less positively than Minnesota for family atmosphere, sightseeing, dining and accommodations, sightseeing opportunities, worry-free experience, entertainment options, and sports and recreation.

- However, the two destinations were tied or extremely close in other areas including being an excellent value for the money, excitement, uniqueness, adult vacation experience, popularity, affordability, and overall climate.
South Dakota’s rankings generally fell in the middle of the competitive set:

- Lead the competitive set in having a safe, worry free atmosphere, though it was statistically tied with Wisconsin, Colorado, and Minnesota.
- Ahead of Minnesota for sightseeing, including well-known landmarks and Native American culture, popularity among travelers, a unique, adventurous experience and must-see destination, and overall climate.
- Rated less positively than Minnesota for an adult vacation, family atmosphere, dining and accommodations, entertainment options, and outdoor sports and recreation activities.
- Minnesota and South Dakota were very close or tied for excitement, affordability, and overall climate.
Missouri ranks higher than Minnesota only in the perception that it has a better overall climate.

Minnesota gets higher overall ratings than Missouri for excitement, adult and family atmosphere, sightseeing opportunities, being worry-free, and sports and recreation.

Minnesota and Missouri are statistically tied in their ratings for affordability and vacation value, uniqueness, luxury, popularity, and entertainment.

Of the competitive set, Missouri was at the bottom of the pack as a “Place I’d Really Enjoy Visiting”, suitability for an adult vacation, sightseeing and scenery, popularity, and excitement.
The image ratings just discussed examined 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’ (within the last two years) image of Minnesota based on recent experience--“product delivery”--compared to the image ratings of those who have never 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 it is clear that Minnesota’s product delivers on its perceived image, 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.
➢ The greatest differences in “perception vs. reality” are:

➢ Minnesota’s urban offerings: theater & performing arts, excellent museums & art galleries, excellent shopping, interesting fairs, festivals, and events, exciting nightlife and first-class hotels.

➢ The outdoor and water-related activities such as boating & water sports, canoeing/kayaking, fishing, camping, golf

➢ The important attributes relating to being a fun, welcoming, adventurous, and exciting place for a vacation, a must-see place with lots to see and do for both adults and children, a unique destination with truly beautiful scenery.
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

- Exciting
- Adult Vacation
- Family Atmosphere
- Unique
- Sightseeing
- Luxury
- Popular
- Worry Free
- Entertainment
- Sports and Recreation
- Affordable
- Climate

*Importance*

*A measure of the degree of association between each factor and whether destination is a place “I would really enjoy visiting.”*
## Top 10 Hot Buttons

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>Hot Buttons</th>
</tr>
</thead>
<tbody>
<tr>
<td>A fun place for a vacation</td>
</tr>
<tr>
<td>Vacation there is a real adventure</td>
</tr>
<tr>
<td>Must-see destination</td>
</tr>
<tr>
<td>An exciting place</td>
</tr>
<tr>
<td>Lots to see and do</td>
</tr>
<tr>
<td>Good place for families to visit</td>
</tr>
<tr>
<td>Good for an adult vacation</td>
</tr>
<tr>
<td>Interesting cities/towns</td>
</tr>
<tr>
<td>A place I would feel welcome</td>
</tr>
<tr>
<td>Truly beautiful scenery</td>
</tr>
</tbody>
</table>
Minnesota’s Image vs. Competition
Minnesota Overall Image vs. Competition — “A Place I Would Really Enjoy Visiting*”

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>Region</th>
<th>Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Colorado</td>
<td>65</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>46</td>
</tr>
<tr>
<td>Illinois</td>
<td>45</td>
</tr>
<tr>
<td>Minnesota</td>
<td>45</td>
</tr>
<tr>
<td>Michigan</td>
<td>41</td>
</tr>
<tr>
<td>South Dakota</td>
<td>41</td>
</tr>
<tr>
<td>Missouri</td>
<td>35</td>
</tr>
</tbody>
</table>

*A place I would really enjoy visiting* is the key correlation attribute underlying the analysis in this study.
Minnesota’s Overall Image

Base: Residents of Minnesota’s Regional Advertising Markets

- Exciting: 37%
- Adult Vacation: 49%
- Family Atmosphere: 49%
- Unique: 34%
- Sightseeing: 48%
- Luxury: 45%
- Popular: 35%
- Worry Free: 52%
- Entertainment: 36%
- Sports and Recreation: 51%
- Affordable: 45%
- Climate: 21%

Percent Who Strongly Agree

Minnesota
Minnesota’s Overall Image vs. Competition

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>Exciting</td>
<td>37</td>
<td>49</td>
</tr>
<tr>
<td>Adult Vacation</td>
<td>41</td>
<td>52</td>
</tr>
<tr>
<td>Family Atmosphere</td>
<td>49</td>
<td>49</td>
</tr>
<tr>
<td>Unique</td>
<td>34</td>
<td>47</td>
</tr>
<tr>
<td>Sightseeing</td>
<td>37</td>
<td>49</td>
</tr>
<tr>
<td>Luxury</td>
<td>45</td>
<td>50</td>
</tr>
<tr>
<td>Popular</td>
<td>42</td>
<td>45</td>
</tr>
<tr>
<td>Worry Free</td>
<td>41</td>
<td>47</td>
</tr>
<tr>
<td>Entertainment</td>
<td>47</td>
<td>52</td>
</tr>
<tr>
<td>Sports and Recreation</td>
<td>51</td>
<td>52</td>
</tr>
<tr>
<td>Affordable</td>
<td>43</td>
<td>45</td>
</tr>
<tr>
<td>Climate</td>
<td>43</td>
<td>45</td>
</tr>
</tbody>
</table>

* Includes Missouri, South Dakota, Wisconsin, Michigan, Colorado, and Illinois
Minnesota’s Image vs. Competition — Exciting

Base: Residents of Minnesota’s Regional Advertising Markets

- Exciting
  - Minnesota: 37
  - Competitors: 41

- A fun place for vacation
  - Minnesota: 46
  - Competitors: 46

- Vacation there is a real adventure
  - Minnesota: 36
  - Competitors: 42

- Must-see destination
  - Minnesota: 32
  - Competitors: 38

- An exciting place
  - Minnesota: 34
  - Competitors: 36
Minnesota’s Image vs. Competition — Exciting

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>State</th>
<th>Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Colorado</td>
<td>63</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>38</td>
</tr>
<tr>
<td>South Dakota</td>
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<tr>
<td>Minnesota</td>
<td>37</td>
</tr>
<tr>
<td>Illinois</td>
<td>36</td>
</tr>
<tr>
<td>Michigan</td>
<td>35</td>
</tr>
<tr>
<td>Missouri</td>
<td>30</td>
</tr>
</tbody>
</table>
Minnesota’s Image vs. Competition — Adult Vacation

Base: Residents of Minnesota’s Regional Advertising Markets

- Adult Vacation
  - Minnesota: 49%
  - Competitors: 52%

- Good for adult vacation
  - Minnesota: 49%
  - Competitors: 52%
Minnesota’s Image vs. Competition — Adult Vacation

Base: Residents of Minnesota’s Regional Advertising Markets

- Colorado: 73%
- Wisconsin: 55%
- Illinois: 49%
- Minnesota: 49%
- Michigan: 49%
- South Dakota: 43%
- Missouri: 40%
Minnesota’s Image vs. Competition
— Family Atmosphere

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>Family Atmosphere</th>
<th>Competitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
<td></td>
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<tr>
<td>Minnesota</td>
<td>49</td>
</tr>
<tr>
<td>Competitors</td>
<td>47</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Good place for families to visit</th>
<th>Competitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
<td></td>
</tr>
<tr>
<td>Minnesota</td>
<td>53</td>
</tr>
<tr>
<td>Competitors</td>
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</table>

<table>
<thead>
<tr>
<th>Children would enjoy</th>
<th>Competitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
<td></td>
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<tr>
<td>Minnesota</td>
<td>44</td>
</tr>
<tr>
<td>Competitors</td>
<td>43</td>
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</table>
Minneapolis's Image vs. Competition — Family Atmosphere

Base: Residents of Minnesota's Regional Advertising Markets

<table>
<thead>
<tr>
<th>State</th>
<th>Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Colorado</td>
<td>63</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>54</td>
</tr>
<tr>
<td>Minnesota</td>
<td>49</td>
</tr>
<tr>
<td>South Dakota</td>
<td>44</td>
</tr>
<tr>
<td>Michigan</td>
<td>41</td>
</tr>
<tr>
<td>Missouri</td>
<td>40</td>
</tr>
<tr>
<td>Illinois</td>
<td>37</td>
</tr>
</tbody>
</table>
Minnesota’s Image vs. Competition — Unique

Base: Residents of Minnesota’s Regional Advertising Markets

![Bar chart showing the percentage of people who strongly agree that Minnesota and its competitors are unique, unique vacation experience, and interesting customs and traditions. The chart indicates that Minnesota leads in uniqueness and has a higher percentage of people agreeing with the statement compared to competitors.]
Minneapolis’s Image vs. Competition — Unique

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>Region</th>
<th>Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Colorado</td>
<td>51</td>
</tr>
<tr>
<td>South Dakota</td>
<td>43</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>37</td>
</tr>
<tr>
<td>Minnesota</td>
<td>34</td>
</tr>
<tr>
<td>Missouri</td>
<td>32</td>
</tr>
<tr>
<td>Michigan</td>
<td>31</td>
</tr>
<tr>
<td>Illinois</td>
<td>28</td>
</tr>
</tbody>
</table>
Minnesota’s Image vs. Competition — Sightseeing

Base: Residents of Minnesota’s Regional Advertising Markets

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

Percent Who Strongly Agree

Minnesota
Competitors

Longwoods INTERNATIONAL
Minnesota’s Image vs. Competition — Sightseeing

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>State</th>
<th>Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Colorado</td>
<td>64</td>
</tr>
<tr>
<td>South Dakota</td>
<td>56</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>51</td>
</tr>
<tr>
<td>Minnesota</td>
<td>48</td>
</tr>
<tr>
<td>Michigan</td>
<td>43</td>
</tr>
<tr>
<td>Illinois</td>
<td>40</td>
</tr>
<tr>
<td>Missouri</td>
<td>40</td>
</tr>
</tbody>
</table>
Minnesota’s Image vs. Competition — Luxury

Base: Residents of Minnesota’s Regional Advertising Markets

Percent Who Strongly Agree

- Luxury: 45% (Minnesota), 42% (Competitors)
- Excellent resorts/cabins/cottages: 53% (Minnesota), 45% (Competitors)
- Elegant, sophisticated restaurants: 46% (Minnesota), 37% (Competitors)
- First class hotels: 44% (Minnesota), 37% (Competitors)
Minnesota’s Image vs. Competition — Luxury

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>State</th>
<th>Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Colorado</td>
<td>56</td>
</tr>
<tr>
<td>Illinois</td>
<td>49</td>
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<tr>
<td>Minnesota</td>
<td>45</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>43</td>
</tr>
<tr>
<td>Missouri</td>
<td>37</td>
</tr>
<tr>
<td>Michigan</td>
<td>36</td>
</tr>
<tr>
<td>South Dakota</td>
<td>28</td>
</tr>
</tbody>
</table>
Minnesota’s Image vs. Competition — Popular

Base: Residents of Minnesota’s Regional Advertising Markets

- Popular
  - Minnesota: 35%
  - Competitors: 41%

- Popular with vacationers
  - Minnesota: 40%
  - Competitors: 45%

- Well-known destination
  - Minnesota: 37%
  - Competitors: 46%

- I often notice advertising for this place
  - Minnesota: 27%
  - Competitors: 32%
Minnesota’s Image vs. Competition — Popular

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>Location</th>
<th>Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Colorado</td>
<td>63</td>
</tr>
<tr>
<td>South Dakota</td>
<td>40</td>
</tr>
<tr>
<td>Wisconsin</td>
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</tr>
<tr>
<td>Illinois</td>
<td>36</td>
</tr>
<tr>
<td>Minnesota</td>
<td>35</td>
</tr>
<tr>
<td>Michigan</td>
<td>33</td>
</tr>
<tr>
<td>Missouri</td>
<td>32</td>
</tr>
</tbody>
</table>
Minnesota’s Image vs. Competition—Worry-free

Base: Residents of Minnesota’s Regional Advertising Markets

- Worry-free
- A place I would feel welcome
- Good place to relax
- Warm, friendly people
- A safe place to visit
- Not too crowded

Percent Who Strongly Agree

<table>
<thead>
<tr>
<th>Perception</th>
<th>Minnesota</th>
<th>Competitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worry-free</td>
<td>52%</td>
<td>47%</td>
</tr>
<tr>
<td>A place I would feel welcome</td>
<td>55%</td>
<td>49%</td>
</tr>
<tr>
<td>Good place to relax</td>
<td>52%</td>
<td>48%</td>
</tr>
<tr>
<td>Warm, friendly people</td>
<td>52%</td>
<td>44%</td>
</tr>
<tr>
<td>A safe place to visit</td>
<td>58%</td>
<td>51%</td>
</tr>
<tr>
<td>Not too crowded</td>
<td>51%</td>
<td>44%</td>
</tr>
</tbody>
</table>

Minnesota vs. Competitors
Minnesota’s Image vs. Competition — Worry-free

Base: Residents of Minnesota’s Regional Advertising Markets

- South Dakota: 55%
- Wisconsin: 53%
- Colorado: 52%
- Minnesota: 52%
- Missouri: 44%
- Michigan: 44%
- Illinois: 29%
Minnesota’s Image vs. Competition — Entertainment

Base: Residents of Minnesota’s Regional Advertising Markets

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

Percent Who Strongly Agree

<table>
<thead>
<tr>
<th>Category</th>
<th>Minnesota</th>
<th>Competitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entertainment</td>
<td>36</td>
<td>34</td>
</tr>
<tr>
<td>Interesting festivals/fairs/events</td>
<td>39</td>
<td>41</td>
</tr>
<tr>
<td>Exciting nightlife</td>
<td>28</td>
<td>30</td>
</tr>
<tr>
<td>Excellent shopping</td>
<td>36</td>
<td>36</td>
</tr>
<tr>
<td>Excellent museums/art galleries</td>
<td>36</td>
<td>38</td>
</tr>
<tr>
<td>Great for theater and the performing arts</td>
<td>34</td>
<td>31</td>
</tr>
<tr>
<td>Excellent wineries and breweries</td>
<td>26</td>
<td>30</td>
</tr>
</tbody>
</table>
Minnesota’s Image vs. Competition — Entertainment

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>State</th>
<th>Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Illinois</td>
<td>53</td>
</tr>
<tr>
<td>Colorado</td>
<td>39</td>
</tr>
<tr>
<td>Minnesota</td>
<td>36</td>
</tr>
<tr>
<td>Missouri</td>
<td>33</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>32</td>
</tr>
<tr>
<td>Michigan</td>
<td>28</td>
</tr>
<tr>
<td>South Dakota</td>
<td>20</td>
</tr>
</tbody>
</table>
Minnesota’s Image vs. Competition — Sports and Recreation

Base: Residents of Minnesota’s Regional Advertising Markets

- Sports and Recreation: 51%
- Good place for camping: 57%
- Great bicycling: 53%
- Excellent canoeing/kayaking: 55%
- Great hiking: 52%
- Great for golfers: 51%
- Exciting spectator sporting events: 43%
- Excellent skiing/snowboarding/X-country skiing: 53%
- Excellent fishing: 49%
- Great mountain/fat tire biking: 48%
- Great snowmobiling: 56%
- Great for boating/water sports: 43%
- Excellent hunting: 45%

Percent Who Strongly Agree

- Minnesota
- Competitors
Minnesota’s Image vs. Competition — Sports and Recreation

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>State</th>
<th>Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Colorado</td>
<td>59</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>52</td>
</tr>
<tr>
<td>Minnesota</td>
<td>51</td>
</tr>
<tr>
<td>Michigan</td>
<td>44</td>
</tr>
<tr>
<td>South Dakota</td>
<td>38</td>
</tr>
<tr>
<td>Missouri</td>
<td>34</td>
</tr>
<tr>
<td>Illinois</td>
<td>27</td>
</tr>
</tbody>
</table>

Base: Residents of Minnesota’s Regional Advertising Markets.
Minnesota’s Image vs. Competition — Affordable

Base: Residents of Minnesota’s Regional Advertising Markets

- Affordable
- Excellent vacation value
- Good vacation packages
- Affordable to eat there
- Affordable to get to
- Affordable accommodations
- Not too far away

Percent Who Strongly Agree

Minnesota    Competitors

51
47
42
47
45
44
43
38
36
45
43
43
51
60
Minnesota’s Image vs. Competition — Affordable

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>State</th>
<th>Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wisconsin</td>
<td>51</td>
</tr>
<tr>
<td>Minnesota</td>
<td>45</td>
</tr>
<tr>
<td>Missouri</td>
<td>44</td>
</tr>
<tr>
<td>Michigan</td>
<td>44</td>
</tr>
<tr>
<td>South Dakota</td>
<td>44</td>
</tr>
<tr>
<td>Colorado</td>
<td>39</td>
</tr>
<tr>
<td>Illinois</td>
<td>38</td>
</tr>
</tbody>
</table>
Minnesota’s Image vs. Competition — Climate

Base: Residents of Minnesota’s Regional Advertising Markets

- Climate: 21% agree in Minnesota; 26% agree in competitors.
- Excellent climate overall: 21% agree in Minnesota; 26% agree in competitors.
Minnesota’s Image vs. Competition — Climate

Base: Residents of Minnesota’s Regional Advertising Markets

Percent Who Strongly Agree

<table>
<thead>
<tr>
<th>State</th>
<th>Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Colorado</td>
<td>41</td>
</tr>
<tr>
<td>Missouri</td>
<td>32</td>
</tr>
<tr>
<td>South Dakota</td>
<td>25</td>
</tr>
<tr>
<td>Minnesota</td>
<td>21</td>
</tr>
<tr>
<td>Michigan</td>
<td>21</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>20</td>
</tr>
<tr>
<td>Illinois</td>
<td>18</td>
</tr>
</tbody>
</table>
Great for boating/water sports
Excellent fishing
Great snowmobiling
Excellent shopping
Excellent canoeing/kayaking
Excellent skiing/snowboarding/Xcountry skiing
Excellent hunting
Beautiful fall color scenery
Excellent resorts/cabins/cottages
Warm, friendly people
A safe place to visit
A place I would feel welcome
Exciting spectator sporting events
Good for viewing wildlife/birds
Good place to relax

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
Well-known landmarks
Noted for its history
Well-known destination
Great mountain/fat tire biking
Must-see destination
Authentic historical sites
I often notice advertising for this place
Unique vacation experience
Vacation there is a real adventure
Popular with vacationers
Excellent climate overall

Difference in Percent Who Strongly Agree

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
NORTHERN SPARK

Minnesota’s Product Delivery
Minnesota’s Product vs. Image

Base: Residents of Minnesota’s Regional Advertising Markets

- Exciting
- Adult Vacation
- Family Atmosphere
- Unique
- Sightseeing
- Luxury
- Popular
- Worry Free
- Entertainment
- Sports and Recreation
- Affordable
- Climate

Percent Who Strongly Agree

* Visited in past two years

Recent Visitors*  Never Visited

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

Base: Residents of Minnesota’s Regional Advertising Markets

- Exciting
- A fun place for vacation
- Vacation there is a real adventure
- Must-see destination
- An exciting place

Percent Who Strongly Agree

* Visited in past two years

Recent Visitors*

Never Visited
Minnesota’s Product Delivery vs. Image — Adult Vacation

Base: Residents of Minnesota’s Regional Advertising Markets

Adult Vacation

Good for adult vacation

* Visited in past two years

Percent Who Strongly Agree

Recent Visitors*

Never Visited
Minnesota’s Product Delivery vs. Image — Family Atmosphere

Base: Residents of Minnesota’s Regional Advertising Markets

- Family Atmosphere
  - Recent Visitors*: 61%
  - Never Visited: 40%

- Good place for families to visit
  - Recent Visitors*: 65%
  - Never Visited: 44%

- Children would enjoy
  - Recent Visitors*: 58%
  - Never Visited: 35%

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

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th></th>
<th>Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Unique</strong></td>
<td></td>
</tr>
<tr>
<td>Recent Visitors</td>
<td>40</td>
</tr>
<tr>
<td>Never Visited</td>
<td>31</td>
</tr>
<tr>
<td><strong>Unique vacation experience</strong></td>
<td></td>
</tr>
<tr>
<td>Recent Visitors</td>
<td>41</td>
</tr>
<tr>
<td>Never Visited</td>
<td>34</td>
</tr>
<tr>
<td><strong>Interesting customs and traditions</strong></td>
<td></td>
</tr>
<tr>
<td>Recent Visitors</td>
<td>39</td>
</tr>
<tr>
<td>Never Visited</td>
<td>28</td>
</tr>
</tbody>
</table>

* Visited in past two years

---

69
Minnesota’s Product Delivery vs. Image — Sightseeing

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>Sightseeing Feature</th>
<th>Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lots to see and do</td>
<td>42</td>
</tr>
<tr>
<td>Interesting cities/towns</td>
<td>40</td>
</tr>
<tr>
<td>Truly beautiful scenery</td>
<td>37</td>
</tr>
<tr>
<td>Truly unique scenery</td>
<td>44</td>
</tr>
<tr>
<td>Great national/state parks</td>
<td>44</td>
</tr>
<tr>
<td>Charming small towns</td>
<td>41</td>
</tr>
<tr>
<td>Noted for its history</td>
<td>44</td>
</tr>
<tr>
<td>Great wilderness areas</td>
<td>25</td>
</tr>
<tr>
<td>Authentic historical sites</td>
<td>32</td>
</tr>
<tr>
<td>Beautiful fall color scenery</td>
<td>35</td>
</tr>
<tr>
<td>Well-known landmarks</td>
<td>41</td>
</tr>
<tr>
<td>Four amazing seasons</td>
<td>42</td>
</tr>
<tr>
<td>Good for viewing wildlife/birds</td>
<td>37</td>
</tr>
<tr>
<td>Rich Native American culture</td>
<td>49</td>
</tr>
</tbody>
</table>

Percent Who Strongly Agree

- **Recent Visitors***
- **Never Visited**

* Visited in past two years
Minneapolis's Product Delivery vs. Image — Luxury

Base: Residents of Minnesota's Regional Advertising Markets

- **Luxury**
  - Recent Visitors: 55%
  - Never Visited: 37%

- **Excellent resorts/cabins/cottages**
  - Recent Visitors: 62%
  - Never Visited: 42%

- **Elegant, sophisticated restaurants**
  - Recent Visitors: 48%
  - Never Visited: 31%

- **First class hotels**
  - Recent Visitors: 56%
  - Never Visited: 39%

* Visited in past two years

Percent Who Strongly Agree

- Green: Recent Visitors*
- Red: Never Visited

---

* Longwoods International
Minnesota’s Product Delivery vs. Image — Popular

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>Statement</th>
<th>Never Visited</th>
<th>Recent Visitors*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Popular</td>
<td>27</td>
<td>43</td>
</tr>
<tr>
<td>Popular with vacationers</td>
<td>31</td>
<td>50</td>
</tr>
<tr>
<td>Well-known destination</td>
<td>31</td>
<td>43</td>
</tr>
<tr>
<td>I often notice advertising for this place</td>
<td>20</td>
<td>35</td>
</tr>
</tbody>
</table>

* Visited in past two years

Percent Who Strongly Agree

Legend:
- **Green**: Recent Visitors*
- **Red**: Never Visited
Minnesota’s Product Delivery vs. Image — Worry Free

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>Perception</th>
<th>Recent Visitors*</th>
<th>Never Visited</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worry Free</td>
<td>59</td>
<td>46</td>
</tr>
<tr>
<td>A place I would feel welcome</td>
<td>65</td>
<td>48</td>
</tr>
<tr>
<td>Good place to relax</td>
<td>62</td>
<td>44</td>
</tr>
<tr>
<td>Warm, friendly people</td>
<td>58</td>
<td>45</td>
</tr>
<tr>
<td>A safe place to visit</td>
<td>64</td>
<td>52</td>
</tr>
<tr>
<td>Not too crowded</td>
<td>45</td>
<td>40</td>
</tr>
</tbody>
</table>

* Visited in past two years

Percent Who Strongly Agree
Minneapolis’s Product Delivery vs. Image  
— Entertainment

Base: Residents of Minneapolis’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>Activity</th>
<th>Recent Visitors*</th>
<th>Never Visited</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entertainment</td>
<td>47</td>
<td>28</td>
</tr>
<tr>
<td>Interesting festivals/fairs/events</td>
<td>49</td>
<td>29</td>
</tr>
<tr>
<td>Exciting nightlife</td>
<td>49</td>
<td>29</td>
</tr>
<tr>
<td>Excellent shopping</td>
<td>50</td>
<td>26</td>
</tr>
<tr>
<td>Excellent museums/art galleries</td>
<td>49</td>
<td>25</td>
</tr>
<tr>
<td>Great for theater/performing arts</td>
<td>49</td>
<td>23</td>
</tr>
<tr>
<td>Excellent wineries and breweries</td>
<td>37</td>
<td>21</td>
</tr>
</tbody>
</table>
Minneapolis’s Product Delivery vs. Image — Sports and Recreation

Base: Residents of Minnesota’s Regional Advertising Markets

- Sports and Recreation
- Good place for camping
  - Great bicycling
- Excellent canoeing/kayaking
- Great hiking
- Great for golfers
- Exciting spectator sporting events
- Excellent skiing/snowboarding/Xcountry skiing
- Excellent fishing
- Great mountain/fat tire biking
- Great snowmobiling
- Great for boating/water sports
- Excellent hunting

* Visited in past two years

Percent Who Strongly Agree

Recent Visitors* Never Visited

* Visited in past two years
Minneapolis Product Delivery vs. Image — Affordable

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>Feature</th>
<th>Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affordable</td>
<td>54</td>
</tr>
<tr>
<td>Excellent vacation value</td>
<td>47</td>
</tr>
<tr>
<td>Good vacation packages</td>
<td>51</td>
</tr>
<tr>
<td>Affordable to eat there</td>
<td>51</td>
</tr>
<tr>
<td>Affordable to get to</td>
<td>67</td>
</tr>
<tr>
<td>Affordable accommodations</td>
<td>70</td>
</tr>
<tr>
<td>Not too far away</td>
<td>70</td>
</tr>
</tbody>
</table>

* Visited in past two years

- Recent Visitors*
- Never Visited

Longwoods International
Minnesota’s Product Delivery vs. Image — Climate

Base: Residents of Minnesota’s Regional Advertising Markets

**Climate**

- **Percent Who Strongly Agree**
  - Recent Visitors*: 27
  - Never Visited: 18

**Excellent climate overall**

- **Percent Who Strongly Agree**
  - Recent Visitors*: 27
  - Never Visited: 18

* Visited in past two years
Not too far away 31
Affordable to get to 28
Great for theater and the performing arts 25
Excellent canoeing/kayaking 25
Excellent museums/art galleries 25
Children would enjoy 23
Four amazing seasons 22
Great national/state parks 22
Charming small towns 22
Truly beautiful scenery 21
Excellent shopping 21
Good place for families to visit 21

Difference in Percent Who Strongly Agree

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
Great for golfers 21
Excellent hunting 20
Interesting festivals/fairs/events 20
Excellent resorts/cabins/cottages 19
Great wilderness areas 19
Popular with vacationers 19
Good place for camping 19
Great for boating/water sports 18
An exciting place 18
Good place to relax 18
A fun place for vacation 18
Elegant, sophisticated restaurants 17

Difference in Percent Who Strongly Agree

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
Top Product Strengths vs. Image (Cont’d)

Base: Residents of Minnesota’s Regional Advertising Markets

- First class hotels
- A place I would feel welcome
- Vacation there is a real adventure
- Great hiking
- Excellent fishing
- Beautiful fall color scenery
- Interesting cities/towns
- Great bicycling
- Excellent wineries and breweries
- Good for adult vacation
- Lots to see and do
- Affordable accommodations

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
Top Product Strengths vs. Image (Cont’d)

Base: Residents of Minnesota’s Regional Advertising Markets

- I often notice advertising for this place: 14%
- Good for viewing wildlife/birds: 14%
- Rich Native American culture: 13%
- Exciting spectator sporting events: 13%
- Authentic historical sites: 12%
- Warm, friendly people: 12%
- Must-see destination: 12%
- Well-known destination: 12%
- A safe place to visit: 12%
- Good vacation packages: 11%
- Interesting customs and traditions: 11%
- Great mountain/fat tire biking: 10%

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
Top Product Strengths vs. Image (Cont’d)

Base: Residents of Minnesota’s Regional Advertising Markets

- Excellent vacation value: 10
- Truly unique scenery: 10
- Excellent climate overall: 10
- Well-known landmarks: 10
- Exciting nightlife: 9
- Affordable to eat there: 9
- Excellent skiing/snowboarding/X-country skiing: 9
- Great snowmobiling: 8
- Unique vacation experience: 8
- Noted for its history: 6
- Not too crowded: 5

Difference in Percent Who Strongly Agree
THERE WERE NO SIGNIFICANT PERCEIVED PRODUCT WEAKNESSES VS. IMAGE
Impact of Advertising on Image
The Campaign
2017 Spring/Summer Ads
The campaign had a positive impact on travelers’ perceptions of Minnesota:

- People exposed to the campaign gave Minnesota substantially higher rating scores than those unfamiliar with the campaign for the general overall statement “Minnesota is a place I would really enjoy visiting”.

- For the more detailed attributes, we find that the campaign did a very good job of improving people’s perceptions of Minnesota for every image dimension evaluated.
The advertising had greatest impact on perceptions related to:

- Excitement, especially the aspects of fun, adventure and being a must-see destination
- Popularity as a destination.
- Being suitable for couples/adults.
- Entertainment.

Of these variables, being thought of as an “exciting” destination and one suitable for an “adult vacation” are the very top motivators for travelers at the “wish-list” stage of selecting destinations for future trips, i.e., when destinations are just ideas and no actual plans have been made.
Advertising Impact on Minnesota’s Image as “A Place I’d Really Enjoy Visiting”

![Chart showing the percentage of respondents strongly agree with the statement for those who are aware and unaware of the advertising Campaign.]

- **Aware**: 53%
- **Unaware**: 38%

*Saw at least one ad.

**“Percent who strongly agree” is the percent of respondents giving a statement an agree/disagree rating of 8, 9 or 10 out of 10**
Impact of Advertising on Image – All Advertising Markets

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Aware*</th>
<th>Unaware</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exciting</td>
<td>44</td>
<td>54</td>
</tr>
<tr>
<td>Adult Vacation</td>
<td>45</td>
<td>52</td>
</tr>
<tr>
<td>Family Atmosphere</td>
<td>46</td>
<td>53</td>
</tr>
<tr>
<td>Unique</td>
<td>41</td>
<td>51</td>
</tr>
<tr>
<td>Sightseeing</td>
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<tr>
<td>Luxury</td>
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<td>55</td>
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<tr>
<td>Popular</td>
<td>41</td>
<td>56</td>
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<tr>
<td>Worry Free</td>
<td>49</td>
<td>55</td>
</tr>
<tr>
<td>Entertainment</td>
<td>48</td>
<td>55</td>
</tr>
<tr>
<td>Sports and Recreation</td>
<td>48</td>
<td>55</td>
</tr>
<tr>
<td>Affordable</td>
<td>42</td>
<td>48</td>
</tr>
<tr>
<td>Climate</td>
<td>26</td>
<td>17</td>
</tr>
</tbody>
</table>

*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: 41% (Aware) vs. 52% (Unaware)
- Vacation there is a real adventure: 32% (Aware) vs. 41% (Unaware)
- Must-see destination: 27% (Aware) vs. 38% (Unaware)
- An exciting place: 26% (Aware) vs. 44% (Unaware)
- Lots to see and do: 44% (Aware) vs. 49% (Unaware)
- Good place for families to visit: 44% (Aware) vs. 51% (Unaware)
- Good for adult vacation: 45% (Aware) vs. 54% (Unaware)
- Interesting cities/towns: 41% (Aware) vs. 49% (Unaware)
- A place I would feel welcome: 50% (Aware) vs. 60% (Unaware)
- Truly beautiful scenery: 52% (Aware) vs. 65% (Unaware)

* Saw at least one ad

Saw at least one ad
Image Attributes Most Impacted by Advertising

Base: Residents of Minnesota’s Regional Advertising Markets

- An exciting place: 18
- I often notice advertising for this place: 15
- Excellent wineries and breweries: 14
- Great for golfers: 14
- Truly beautiful scenery: 13
- Excellent resorts/cabins/cottages: 12
- Four amazing seasons: 12
- Great for theater and the performing arts: 12
- Popular with vacationers: 12
- Great mountain/fat tire biking: 11

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

* * *
Image Attributes Most Impacted by Advertising (Cont’d)

Base: Residents of Minnesota’s Regional Advertising Markets

- Must-see destination: 11
- Well-known landmarks: 11
- A fun place for vacation: 11
- Exciting spectator sporting events: 10
- A place I would feel welcome: 10
- First class hotels: 10
- Exciting nightlife: 9
- Noted for its history: 9
- Excellent hunting: 9
- Great hiking: 9

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
### Image Attributes Most Impacted by Advertising (Cont’d)

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Difference in Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Great national/state parks</td>
<td>9</td>
</tr>
<tr>
<td>Charming small towns</td>
<td>9</td>
</tr>
<tr>
<td>Vacation there is a real adventure</td>
<td>9</td>
</tr>
<tr>
<td>Excellent museums/art galleries</td>
<td>9</td>
</tr>
<tr>
<td>Good for adult vacation</td>
<td>9</td>
</tr>
<tr>
<td>Unique vacation experience</td>
<td>9</td>
</tr>
<tr>
<td>Excellent climate overall</td>
<td>9</td>
</tr>
<tr>
<td>Affordable accommodations</td>
<td>8</td>
</tr>
<tr>
<td>Interesting cities/towns</td>
<td>8</td>
</tr>
<tr>
<td>Warm, friendly people</td>
<td>8</td>
</tr>
</tbody>
</table>

*Attributes marked with a chevron indicate some of the most important image hot buttons for travelers*
Approximately 6 in 10 (60%) of travelers in Minnesota’s core markets recalled seeing at least one Minnesota tourism ad among the portfolio of 27 they were exposed to in the survey.

Among those who saw Minnesota ads in several types of media, ad recall was highest for digital ads (41%), followed by TV (36%).

The ads with the highest level of recall were:
- Outdoor Digital Banner Compilation
- There’s Something Happening TV ad
- Lake Digital Banner Compilation
Awareness of the Ad Campaign

Base: Residents of Minnesota’s Regional Advertising Markets

Aware* 60%

Unaware 40%

*Saw at least one ad
Advertising Awareness* by Medium

Base: Residents of Minnesota’s Regional Advertising Markets

- Aware of any ad: 60%
- Digital: 41% (6% other media, 4% only)
- TV: 36% (4% other media, 2% only)
- Out-of-Home: 25% (2% other media, 3% only)
- Social Media: 22% (3% other media, 1% only)
- Print: 14% (2% other media, 1% only)
- Radio: 9% (1% other media, 1% only)

*Saw at least one ad

Other Media | Only
Awareness* by Market

Base: Residents of Minnesota’s Regional Advertising Markets

*Saw at least one ad
Awareness of Individual Ads* — Digital

- Outdoor Banner Compilation: 16%
- Lake Banner Compilation: 13%
- Teads Tile: 12%
- Entertainment Banner Compilation: 11%
- Carousel 3 Image: 7%
- 10,000 Possibilities: 7%
- Take 5 Ad: 5%
- Something Happening Digital Radio: 5%
- Golf Online Radio: 5%
- Outdoor Magic Digital Radio: 4%

*Based on markets where shown
There's Something Happening
Measure Your Moments
Legendary Moments
Saw #OnlyinMN monument- On television
She is This Place

*Based on markets where shown
Awareness of Individual Ads* — Out-of-Home

- Water Compilation: 6
- Outdoor Compilation: 6
- Golf Compilation: 6
- Food Drink Compilation: 4
- Entertainment Compilation: 4
- Sport Compilation: 3
- Saw #OnlyinMN monument in person: 1

*Based on markets where shown
Awareness of Individual Ads* — Social Media

- Saw Social Media Post since April 2017: 15%
- Saw #OnlyinMN monument on social media: 6%

*Based on markets where shown
Awareness of Individual Ads* — Print

*Based on markets where shown
Awareness of Individual Ads* — Radio

- **Golf**: 5
- **Something Happening**: 5
- **Outdoor Magic**: 4

*Based on markets where shown
Media Diagnostics
Advertising Awareness

➢ On average, a traveler recalled seeing an Explore Minnesota ad on 5.6 occasions, which translates into approximately 169 million exposures over the campaign period.

➢ The average frequency of recall by medium follows a similar pattern to awareness levels, i.e., showing highest frequency for digital ads, followed by TV ads, then OOH ads, social, print and radio.
Definition of Awareness

- TV Only
- Digital Only
- TV +
- Digital +
- Both
Mean Frequency = 5.43
Total = 169 Million Exposures

*Saw at least one ad
Total Exposures Recalled by Medium

Total Exposures = 169 Million

- Any ad: 169
- Digital: 73
- TV: 37
- OOH: 22
- Social: 20
- Radio: 9
- Print: 8

Media Spend:
- TV: $1.30M
- Digital: $1M
- Out-of-Home: $0.61M
- Print: $0.25M
- Social: $0.17M
- Radio: $0.09M

*Incidence of awareness x population aware x mean frequency recalled
Impact of Advertising on Short-term Trip Taking to Minnesota

% Took A Leisure Trip From June 2017-September 2017

*Saw at least one ad
Halo Effect on Economic Development Image
Tourism marketing research has long demonstrated that tourism advertising and the visitation it inspires have a positive impact on consumers’ image of destinations as a place for leisure travel and recreation. Applying the psychological concept of the “halo effect” to tourism promotion advertising, Longwoods set out to determine if the gains in image for Minnesota from its tourism advertising would extend beyond the appeal as a place to visit. Could it be that economic objectives could be achieved such as viewing Minnesota more favorably as a place to live, work, start a business, attend college, purchase a vacation home and retire?

Longwoods International has conducted this research for multiple state and city destination across the U.S. For this study, 1,400 consumers were surveyed for Minnesota’s 2017 “#Only in MN” campaign.
In every case, Minnesota’s tourism advertising and subsequent visitation significantly improved the image of Minnesota not only as a place to visit, but also for a wide range of other economic development objectives.

The research compared the rankings by those who had not seen the “#OnlyinMN” campaign or visited Minnesota with those who did see the tourism ads and/or visited.

For each economic development objective, the most dramatic improvement in image was by those consumers who both were exposed to the advertising campaign message and visited Minnesota.
Specifically, the Minnesota “#OnlyinMN” advertising campaign created a strong image lift. For example, those who saw the Minnesota ad campaign were 34% more likely to view Minnesota as “a good place to start a business” than those who had not seen the ads. Those who had visited Minnesota were 54% more likely to view Minnesota as “a good place to start a business” than those who have not visited, and those who had both seen the campaign and visited were 77% more likely to view Minnesota as “a good place to start a business.” The same pattern holds true for all six economic development objectives in the study.
Tourism functions as the front door for economic development because if Minnesota is successful in attracting visitors to the state, those people view Minnesota more favorably as a place to live, work, start a business, attend college, purchase a vacation home and retire.

Tourism can play a very powerful role in helping Minnesota achieve its economic development objectives and this new data definitely will jumpstart that conversation.
Impact of Minnesota’s 2017 Tourism Campaign on State’s Economic Development Image

- A good place to live: +48%
- A good place to start a career: +73%
- A good place to start a business: +34%
- A good place to attend college: +37%
- A good place to purchase a vacation home: +26%
- A good place to retire: +96%
Impact of *Visitation* on Minnesota’s Economic Development Image

- A good place to live: +76%
- A good place to start a career: +106%
- A good place to start a business: +54%
- A good place to attend college: +75%
- A good place to purchase a vacation home: +37%
- A good place to retire: +86%

Percent Who Strongly Agree

<table>
<thead>
<tr>
<th>Visited Past Year</th>
<th>Not Visited</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visited Past Year</td>
<td>Not Visited</td>
</tr>
</tbody>
</table>
“A Good Place to Live”

% Image Lift for Minnesota

- Advertising: 48%
- Visitation: 75%
- Advertising Plus Visitation: 131%

Percent
% Image Lift for Minnesota

- Advertising: 73%
- Visitation: 106%
- Advertising Plus Visitation: 212%
“A Good Place to Start a Business”

% Image Lift for Minnesota

- Advertising: 34%
- Visitation: 54%
- Advertising Plus Visitation: 77%

Percent
“A Good Place to Attend College”

% Image Lift for Minnesota

- Advertising: 37%
- Visitation: 75%
- Advertising Plus Visitation: 114%

Percent
"A Good Place to Purchase a Vacation Home"

% Image Lift for Minnesota

- Advertising: 26%
- Visitation: 37%
- Advertising Plus Visitation: 61%

Percent
“A Good Place to Retire”

% Image Lift for Minnesota

- Advertising: 96%
- Visitation: 86%
- Advertising Plus Visitation: 213%
Information Sources and Social Media

NORTHERN LIGHTS
Information Sources Used for Trip Planning After Seeing Ads

Base: Residents of Minnesota’s Regional Advertising Markets

- ExploreMinnesota.com: 8%
- A hotel or resort: 8%
- Advice from relatives or friends: 6%
- Travel guide books: 6%
- Hotel websites: 6%
- Social Media (e.g. Facebook, Twitter): 5%
- A local visitors’ bureau/CoC: 4%
- Online booking engines (e.g. Expedia): 4%
- Other online sources: 4%
- A travel agent: 4%
Information Sources Used for Trip Planning After Seeing Ads (Cont'd)

Base: Residents of Minnesota’s Regional Advertising Markets

- Travel articles in magazines: 4
- An airline/commercial carrier: 4
- A company that specializes in group tours: 3
- Vacation rental websites: 3
- Newspaper travel section: 3
- A government tourism office: 2
- Television travel shows: 2
- Airline websites: 2
- An auto club: 2

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

Base: Residents of Minnesota’s Regional Advertising Markets

<table>
<thead>
<tr>
<th>Information Sources</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>A toll-free number</td>
<td>2</td>
</tr>
<tr>
<td>Car rental websites</td>
<td>2</td>
</tr>
<tr>
<td>An association/club</td>
<td>2</td>
</tr>
<tr>
<td>Other destination websites</td>
<td>2</td>
</tr>
<tr>
<td>Other information from television</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>Radio travel shows</td>
<td>&lt;1</td>
</tr>
<tr>
<td>Other books</td>
<td>&lt;1</td>
</tr>
</tbody>
</table>
How many times did you visit www.exploreminnesota.com in 2017?

Base: Those who visited www.exploreminnesota.com

- Once: 53%
- Twice: 17%
- Three times: 20%
- Four or more visits: 10%
What did you use the website www.exploreminnesota.com for?

Base: Those who visited www.exploreminnesota.com

- To find things to do while traveling in Minnesota: 58%
- To look for general information on travel opportunities in Minnesota: 54%
- To seek information on Minnesota events: 33%
- To look for travel deals: 31%
- To find lodging: 29%
- To find information on dining: 22%
- To enter a sweepstakes: 14%
How useful was the www.exploreminnesota.com website?

Base: Those who visited www.exploreminnesota.com

- Very useful: 75%
- Somewhat useful: 25%
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: 37%
- Liked, shared or commented on at least one FB post: 25%
- Liked or commented on at least one photo post on EMT Instagram page: 24%
- Followed EMT Twitter feed: 19%
- Retweeted, favorited or replied to at least one Twitter post: 15%
- Followed the EMT Instagram page: 14%
- Posted my own photos using #OnlyinMN: 4%
- Did not respond to any social media post: 43%
How much was your Minnesota travel influenced by Minnesota travel photos, videos, or comments on social media?

Base: Those who have visited MN on a day or overnight leisure trip

- Greatly influenced: 7%
- Somewhat influenced: 18%
- Hardly influenced: 21%
- Not at all influenced: 55%
How likely are you to recommend Minnesota as a travel destination?

Base: Those who have visited MN on a day or overnight leisure trip

- Very likely: 25%
- Somewhat likely: 30%
- Neither likely nor unlikely: 31%
- Not very likely: 6%
- Not at all likely: 8%
Quadrant Analysis of Strength versus Importance for Minnesota’s Image Attributes
The normal interpretation of a quadrant analysis is as follows:

- Important strengths should form the core of positioning/messaging
- Important weaknesses – communications are needed to correct misperceptions
- Less important strengths – can add depth to the story, as “features”
- Less important weaknesses – low priority from a communications standpoint
A quadrant analysis provides more detail on the Minnesota’ image

- The state has some very important strengths:
  - A fun place for a vacation
  - Good place for families and adults to visit
  - Lots to see and do with interesting cities/towns
  - Truly beautiful scenery
  - Good place to relax
  - Excellent resorts/cabins/cottages

- However, some important weaknesses counterbalance those wins:
  - Perceptions that the destination is not a unique, must see destination
  - Perceptions that the destination is not an exciting place where vacation is a real adventure
  - Popularity with vacationers
There are several less important strengths:

- Beautiful fall color and truly unique scenery
- Outdoor characteristics such as great wilderness areas, national/state parks, great camping
- Charming small towns
- Warm friendly people
- A place children would enjoy

And less important weaknesses, perceived as lacking:

- Interesting festivals/fairs/events as well as customs/traditions
- Authentic historic sites/noted for its history
- Being a well-known destination
- Good vacation packages and excellent vacation value
- Great bicycling