



Minnesota 2017
Advertising Evaluation
and Image Study
Report

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Background and Purpose

- ✓ 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:

Minnesota	135	Colorado	280
North Dakota	30	Eastern Kansas	100
South Dakota	30	Western Missouri	195
Iowa	80	Nebraska	115
Wisconsin	150	Thunder Bay Canada	10
Winnipeg Canada	30		
Northern Illinois	245		

- ✓ 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.

Method (Cont'd)

- ✓ 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.

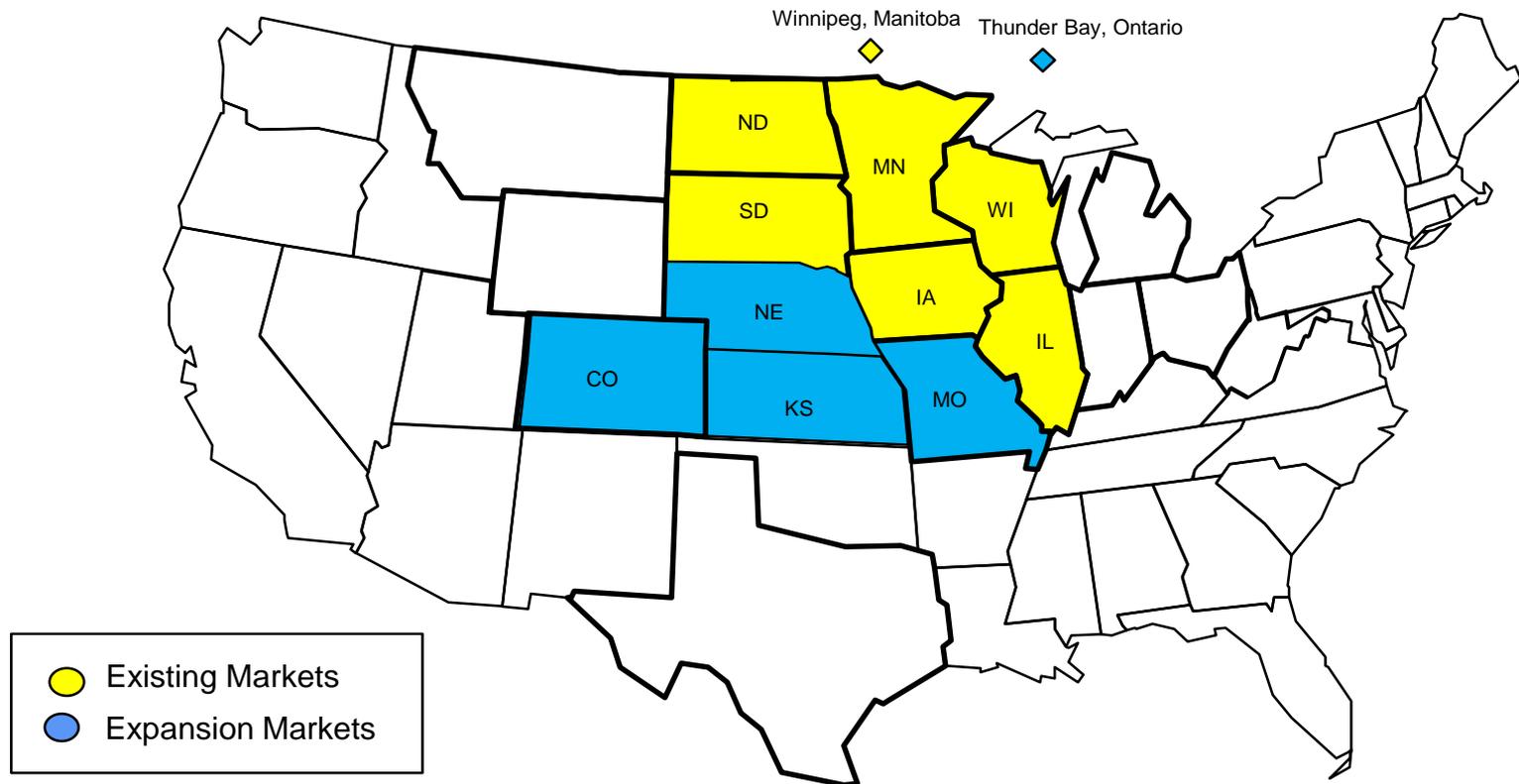
Method (Cont'd)

- ✓ 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

Minnesota Advertising Markets



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

	Existing Markets	Expansion Markets	Combined
Ad Investment	\$ 3.2M	\$ 1.0M	\$ 4.2M
Incremental Trips	2.9M	0.4M	3.3M
Incremental Visitor Spending	\$ 341.6M	\$ 42.3M	\$ 383.9M
Incremental Taxes	\$ 32.8M	\$ 4.1M	\$ 36.9M

- 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

	Existing Markets	Expansion Markets	Combined
Overnight Trips	1,590,228	186,936	1,777,164
Day Trips	1,367,552	197,258	1,564,810
Total	2,957,780	384,194	3,341,974

2017 Campaign Efficiency

	Existing Markets	Expansion Markets	Combined
Ad \$'s per Trip	\$1.07	\$2.69	\$1.25
Trips per Ad \$	0.9	0.4	0.8

The Bottom Line in 2017

	Existing Markets	Expansion Markets	Combined
Spending ROI	\$108	\$41	\$92
Tax ROI	\$10	\$4	\$9

Longer-term Impact of Advertising

– Intent to Visit Minnesota

Intend to Visit Minnesota in Next 12 Months*	
Overnight Trip Intenders	1,237,132
Day Trip Intenders	1,058,658
Total Intenders	2,295,790

* Among those who did not visit Minnesota in 2017



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 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.

Travel Motivators

- 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

Travel Motivators

- 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

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
 - **climate**

Minnesota's Image

- 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.

Minnesota's Image (Cont'd)

- **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.

Minnesota's Image (Cont'd)

- **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.

Minnesota's Image (Cont'd)

- **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.

Minnesota's Image (Cont'd)

- **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.

Minnesota's Image (Cont'd)

- **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.

Product Delivery

- 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.

Product Delivery

- 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.

Product Delivery

- 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.



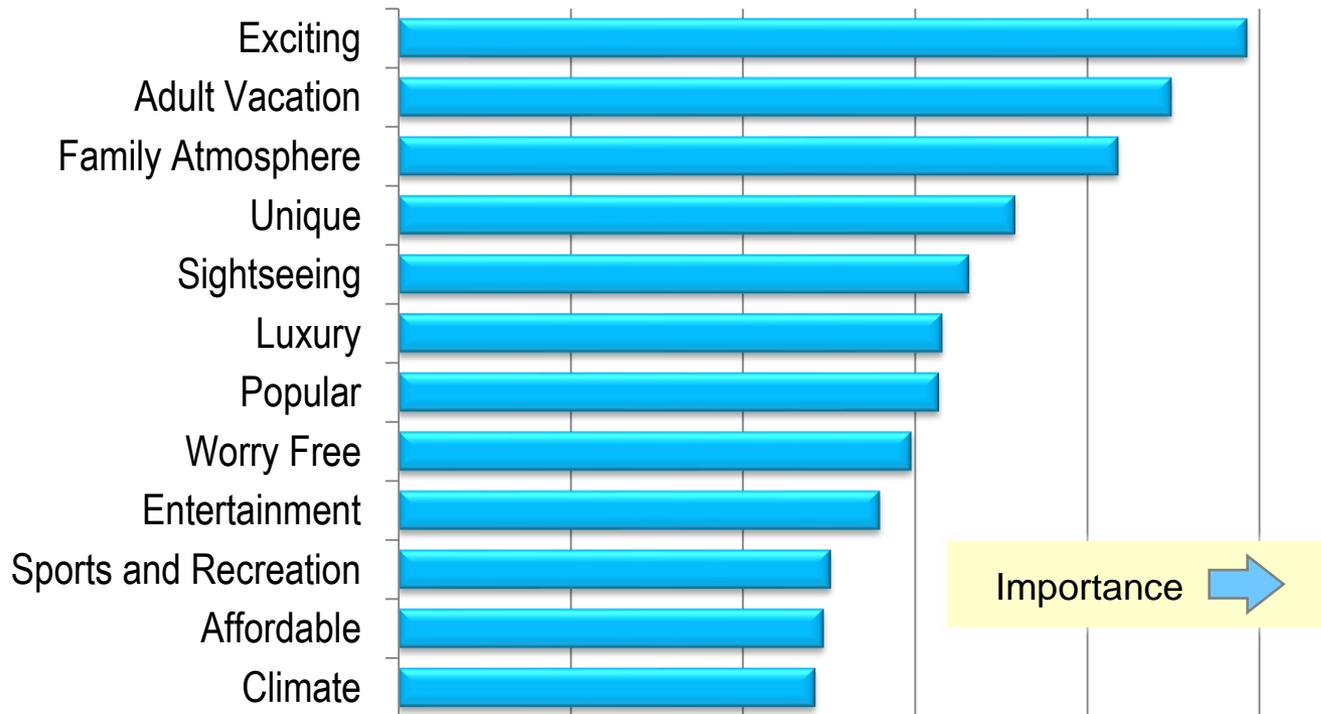
Destination Hot Buttons

Travel Motivators

- 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



*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

Hot Buttons
A fun place for a vacation
Vacation there is a real adventure
Must-see destination
An exciting place
Lots to see and do
Good place for families to visit
Good for an adult vacation
Interesting cities/towns
A place I would feel welcome
Truly beautiful scenery

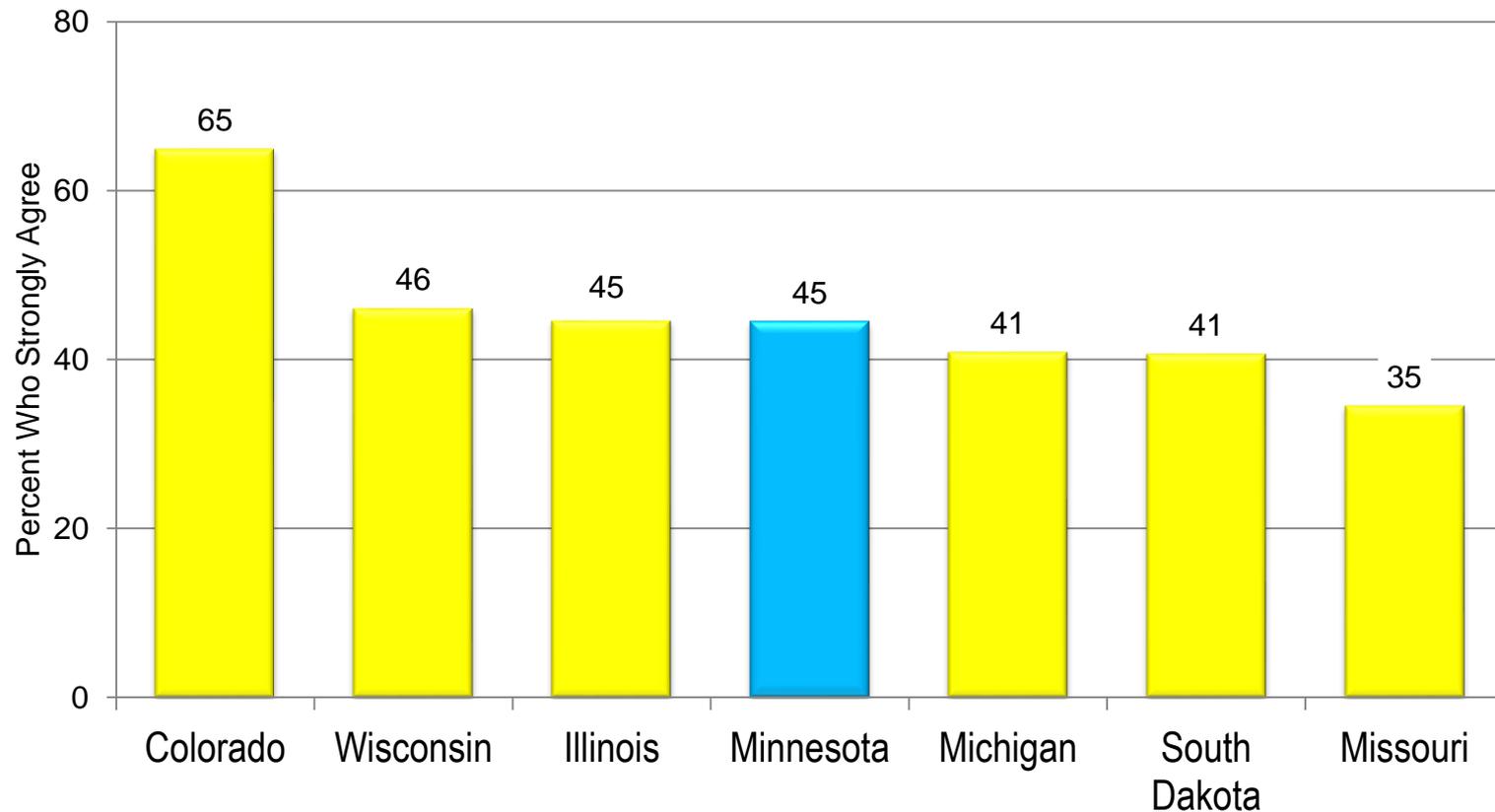


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Minnesota's Image vs. Competition

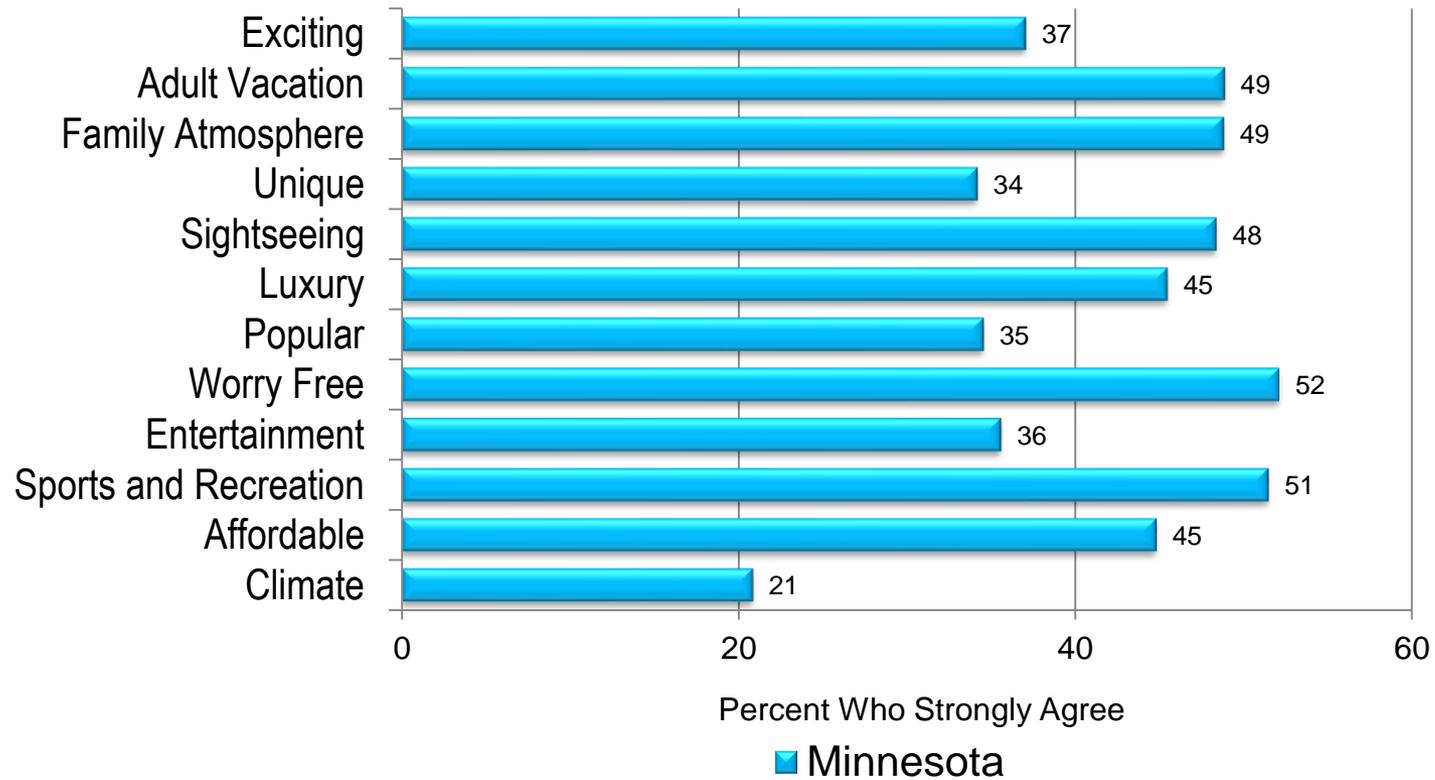
Minnesota Overall Image vs. Competition — “A Place I Would Really Enjoy Visiting”*

Base: Residents of Minnesota’s Regional Advertising Markets



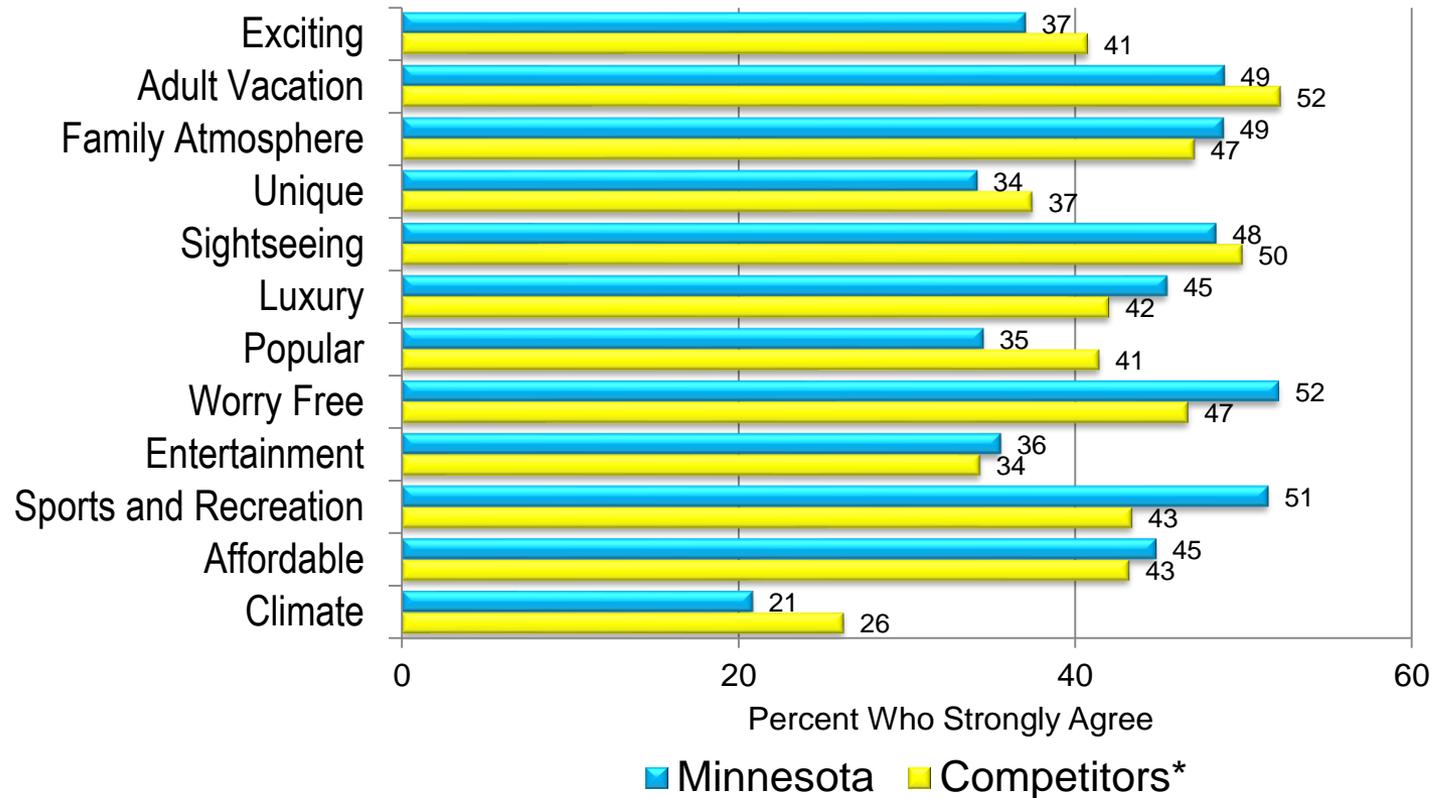
Minnesota's Overall Image

Base: Residents of Minnesota's Regional Advertising Markets



Minnesota's Overall Image vs. Competition

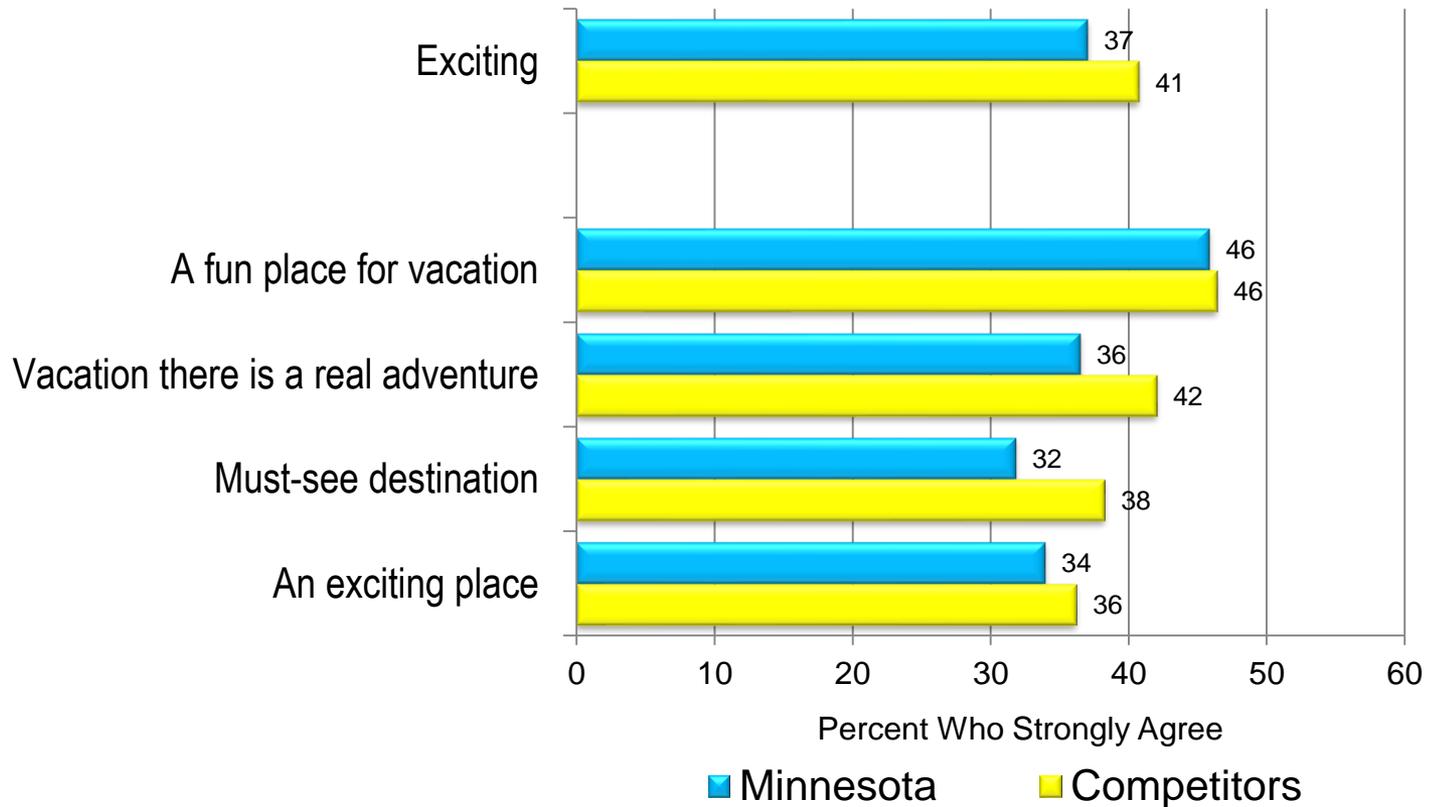
Base: Residents of Minnesota's Regional Advertising Markets



* Includes Missouri, South Dakota, Wisconsin, Michigan, Colorado, and Illinois

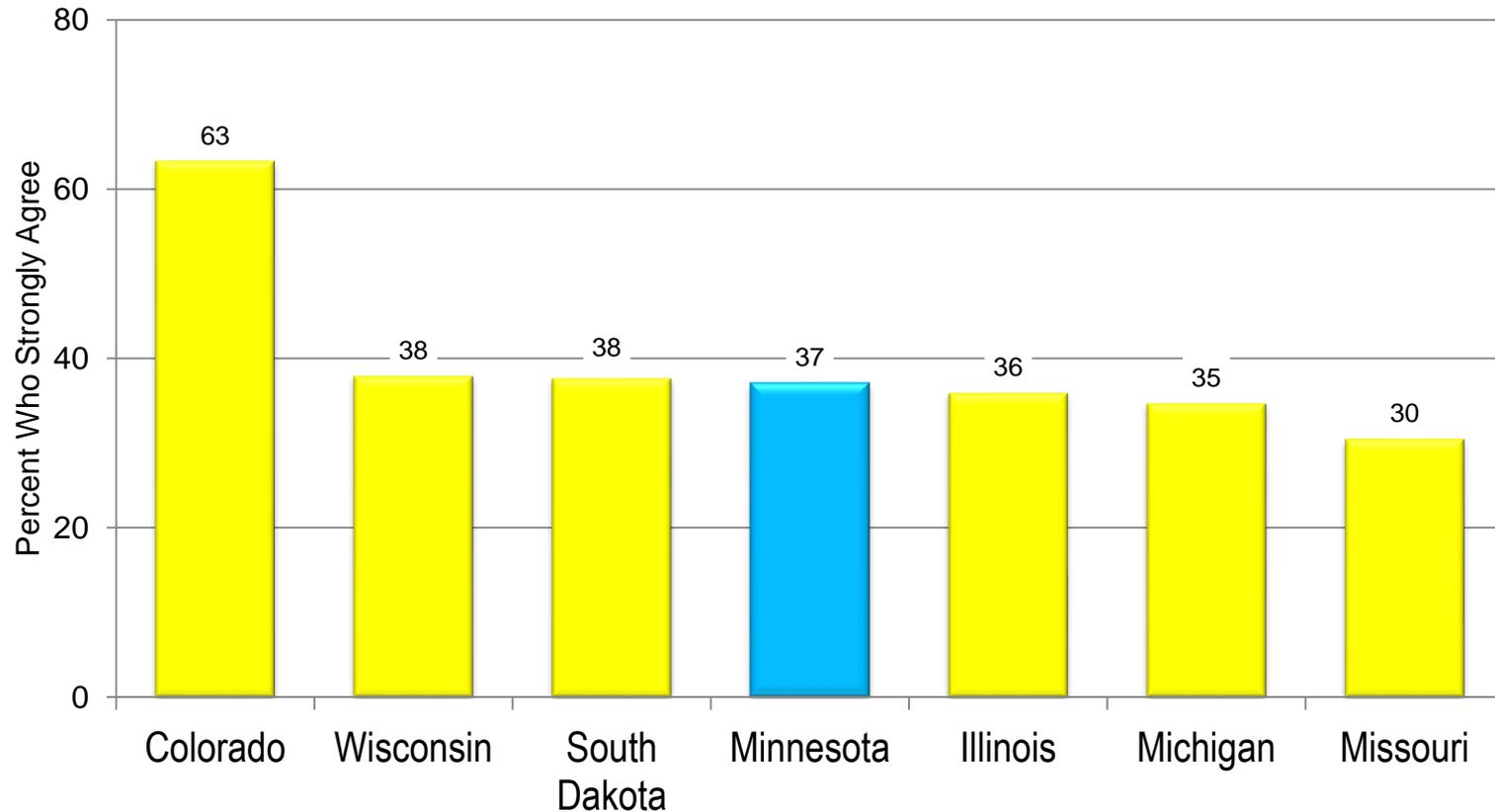
Minnesota's Image vs. Competition — Exciting

Base: Residents of Minnesota's Regional Advertising Markets



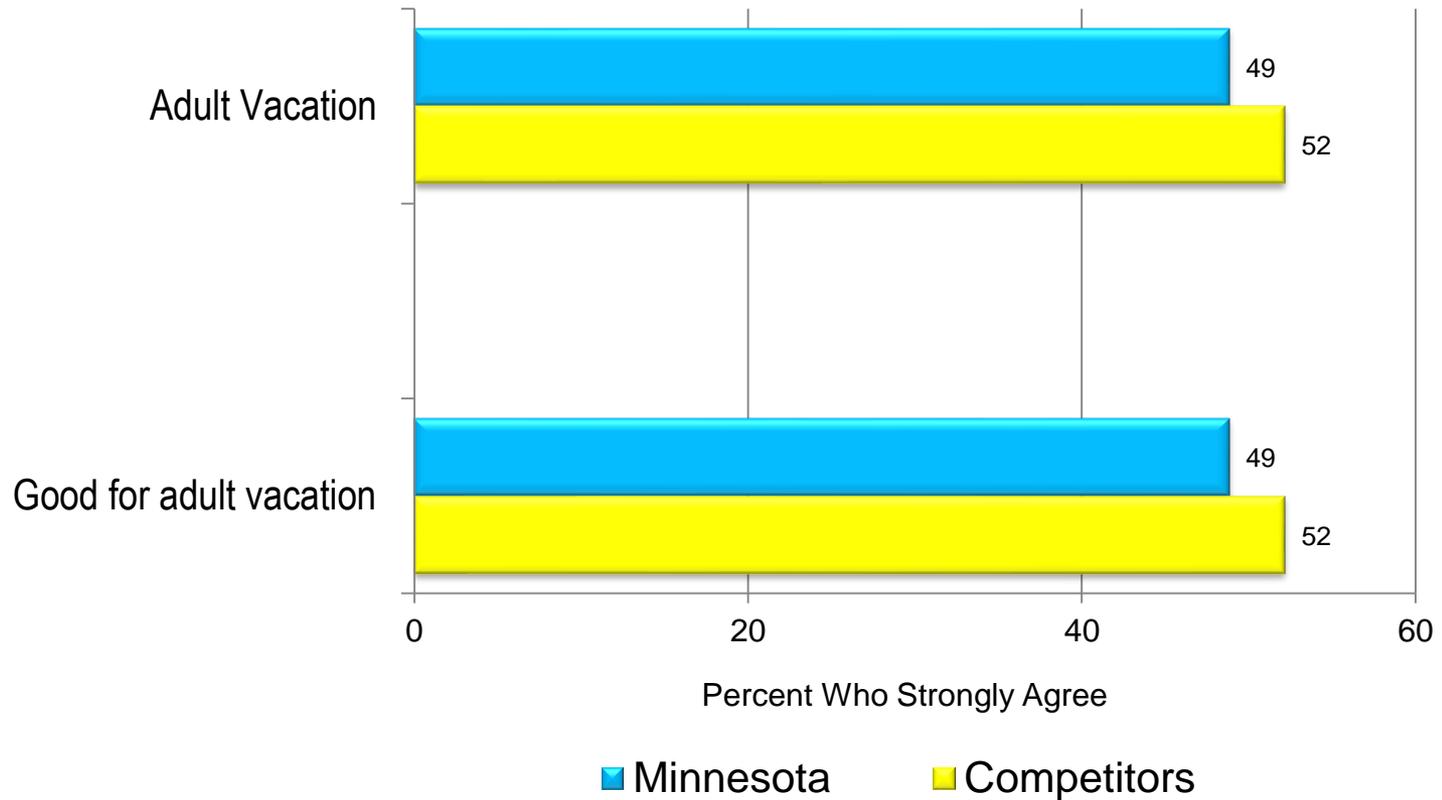
Minnesota's Image vs. Competition — Exciting

Base: Residents of Minnesota's Regional Advertising Markets



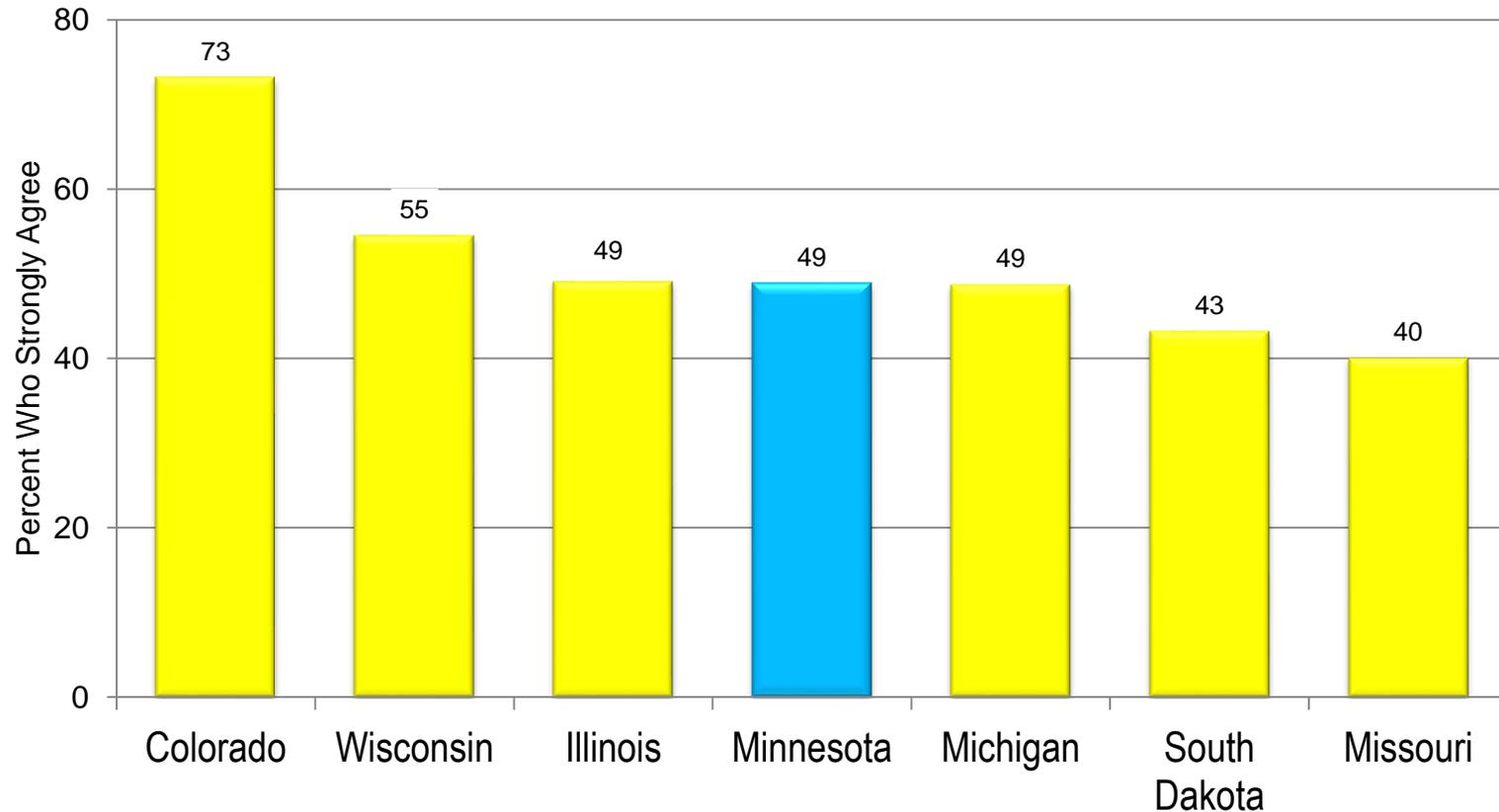
Minnesota's Image vs. Competition — Adult Vacation

Base: Residents of Minnesota's Regional Advertising Markets



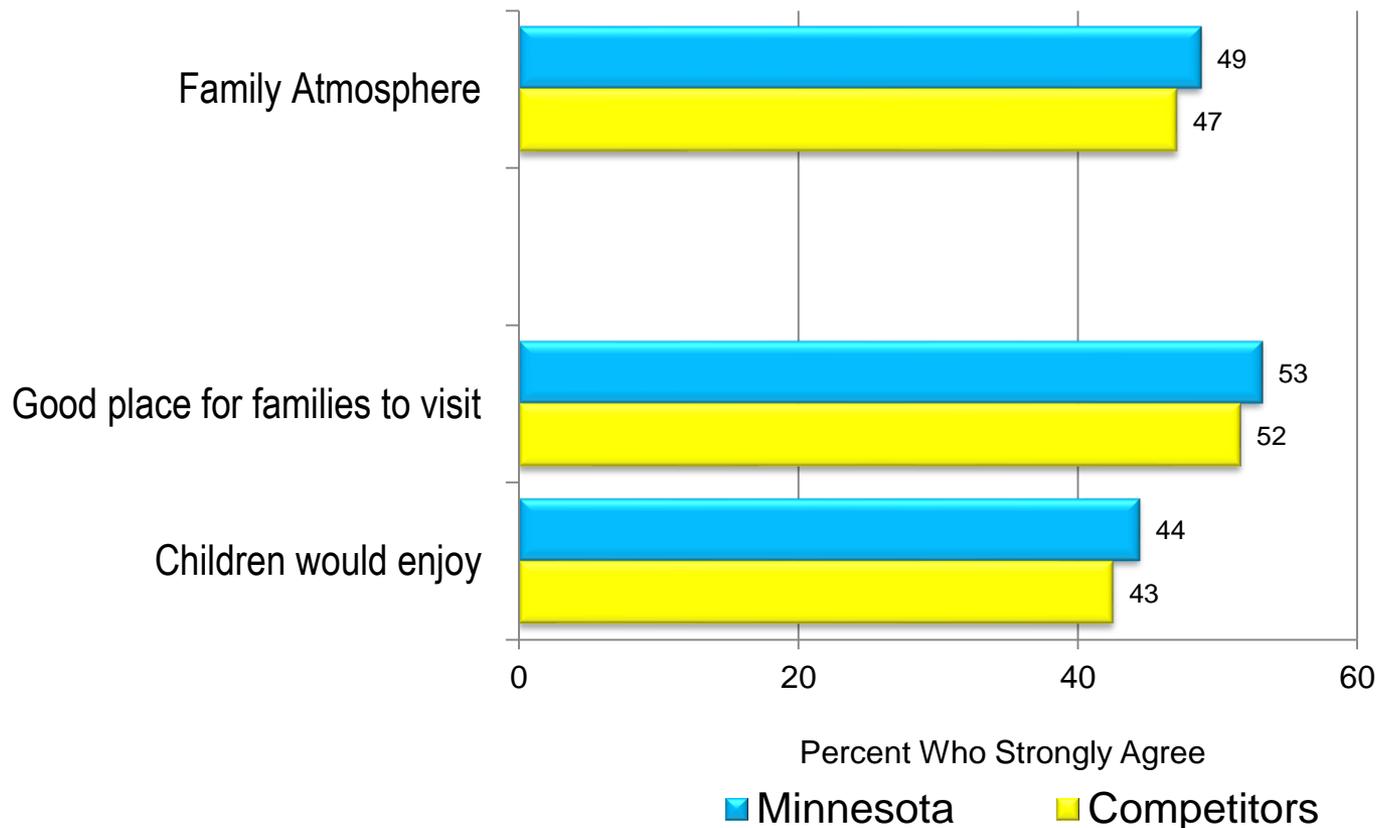
Minnesota's Image vs. Competition — Adult Vacation

Base: Residents of Minnesota's Regional Advertising Markets



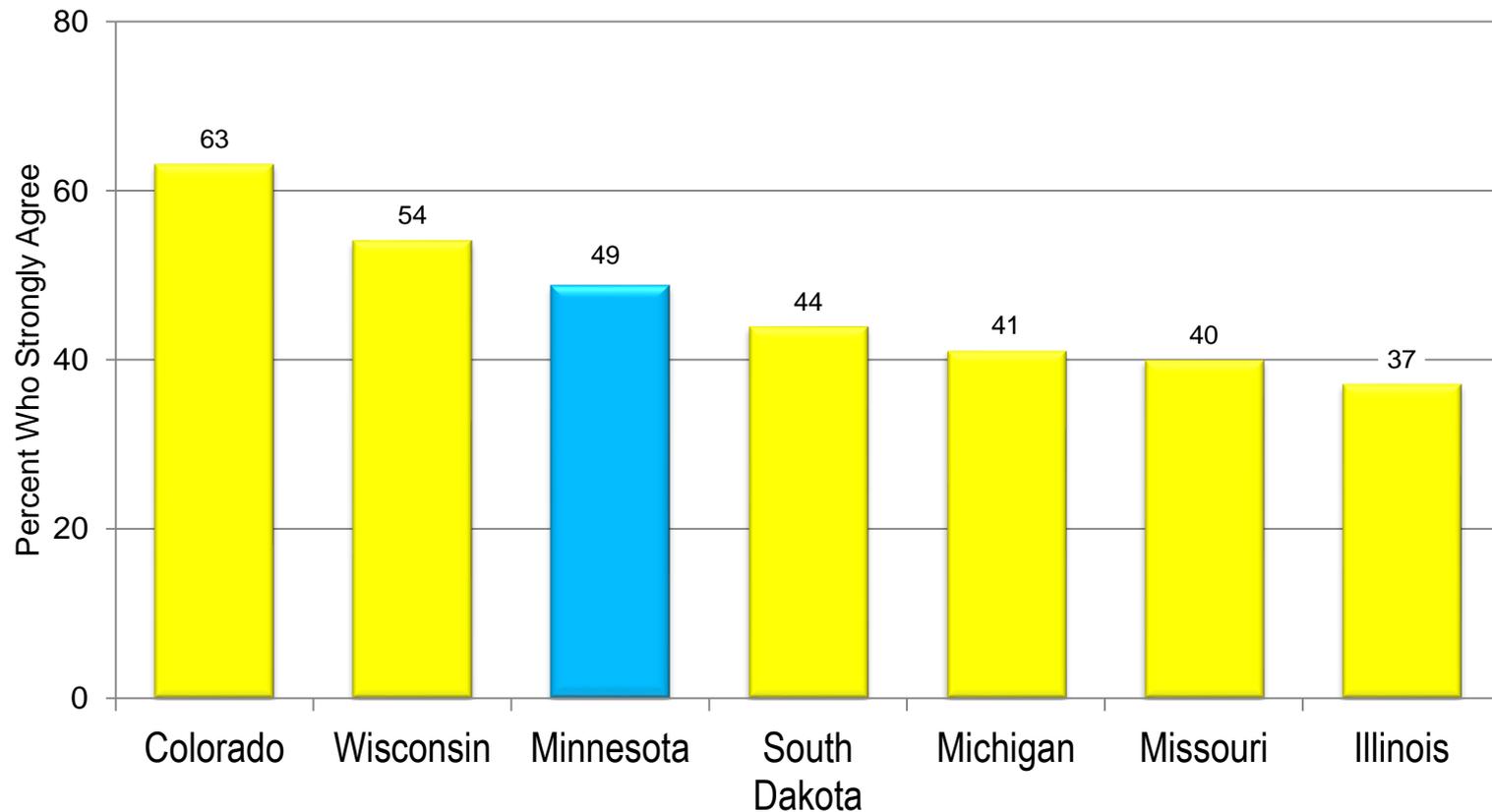
Minnesota's Image vs. Competition — Family Atmosphere

Base: Residents of Minnesota's Regional Advertising Markets



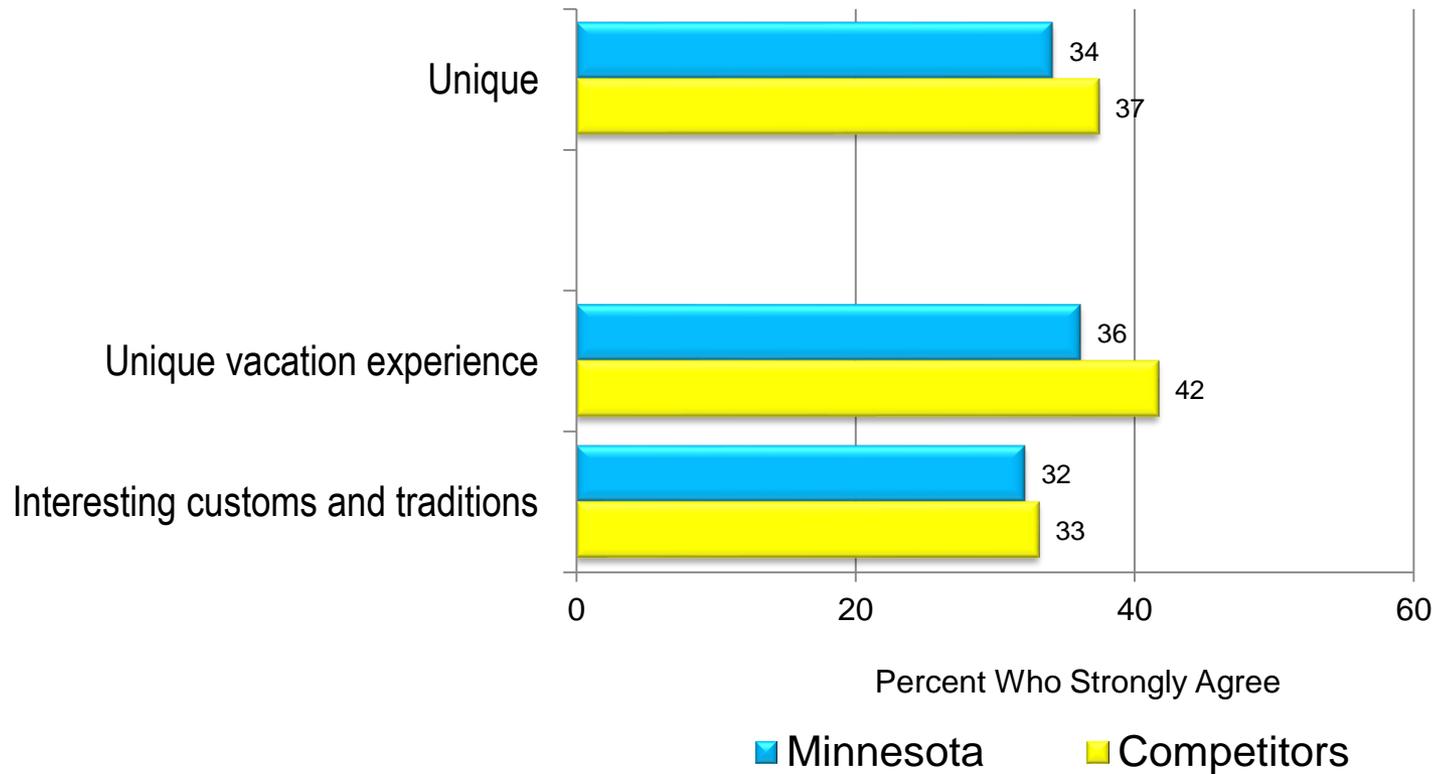
Minnesota's Image vs. Competition — Family Atmosphere

Base: Residents of Minnesota's Regional Advertising Markets



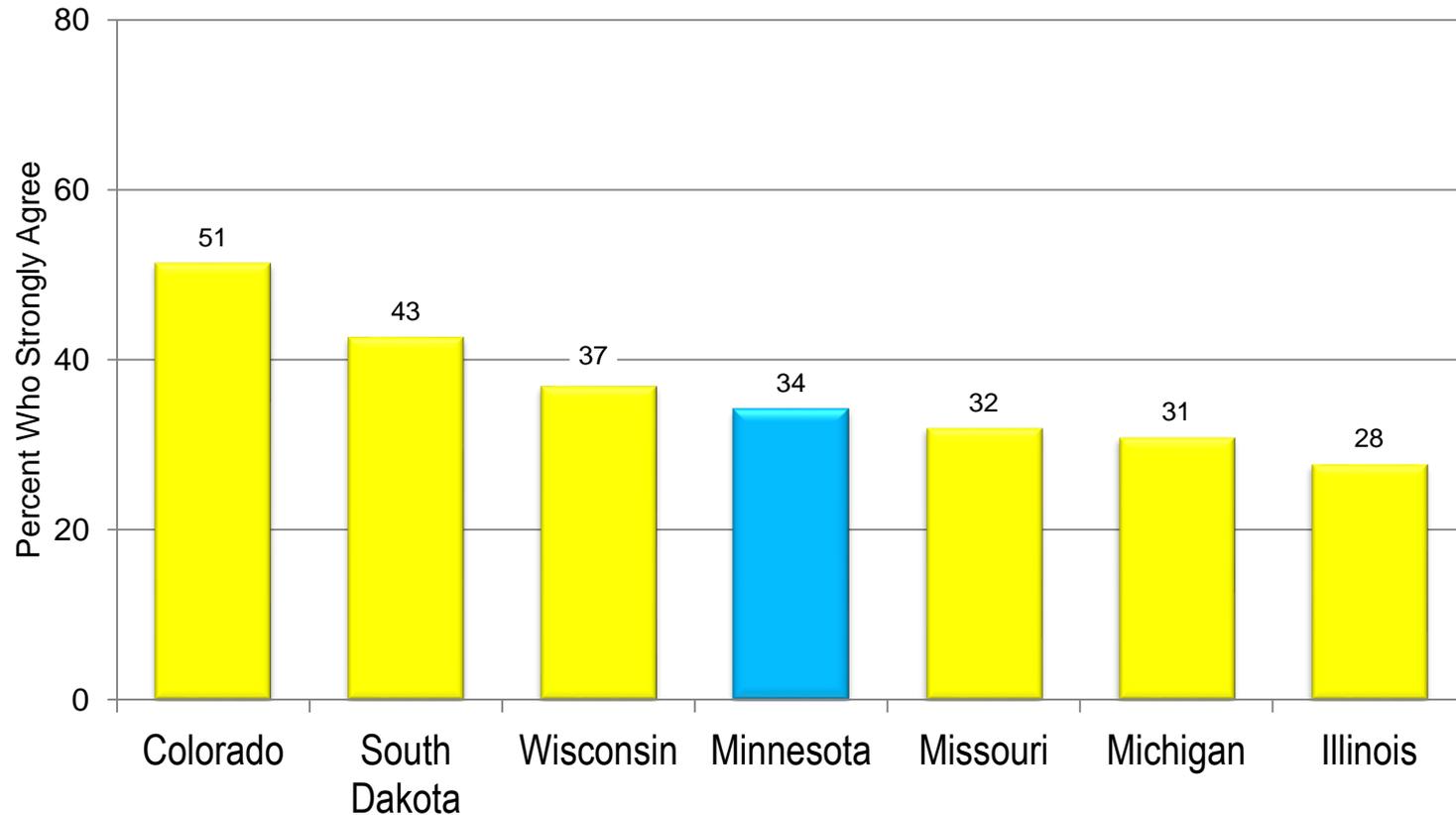
Minnesota's Image vs. Competition — Unique

Base: Residents of Minnesota's Regional Advertising Markets



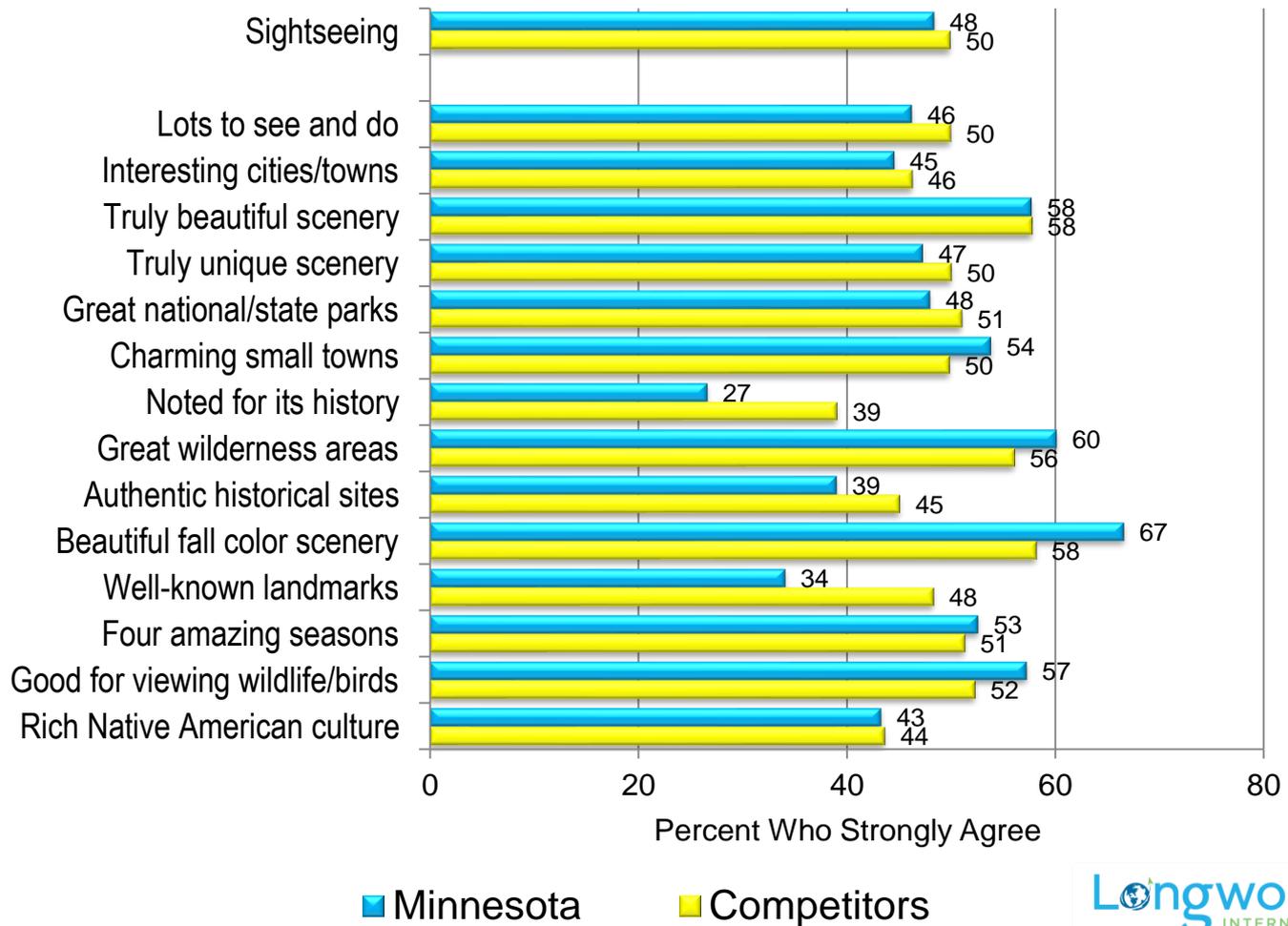
Minnesota's Image vs. Competition — Unique

Base: Residents of Minnesota's Regional Advertising Markets



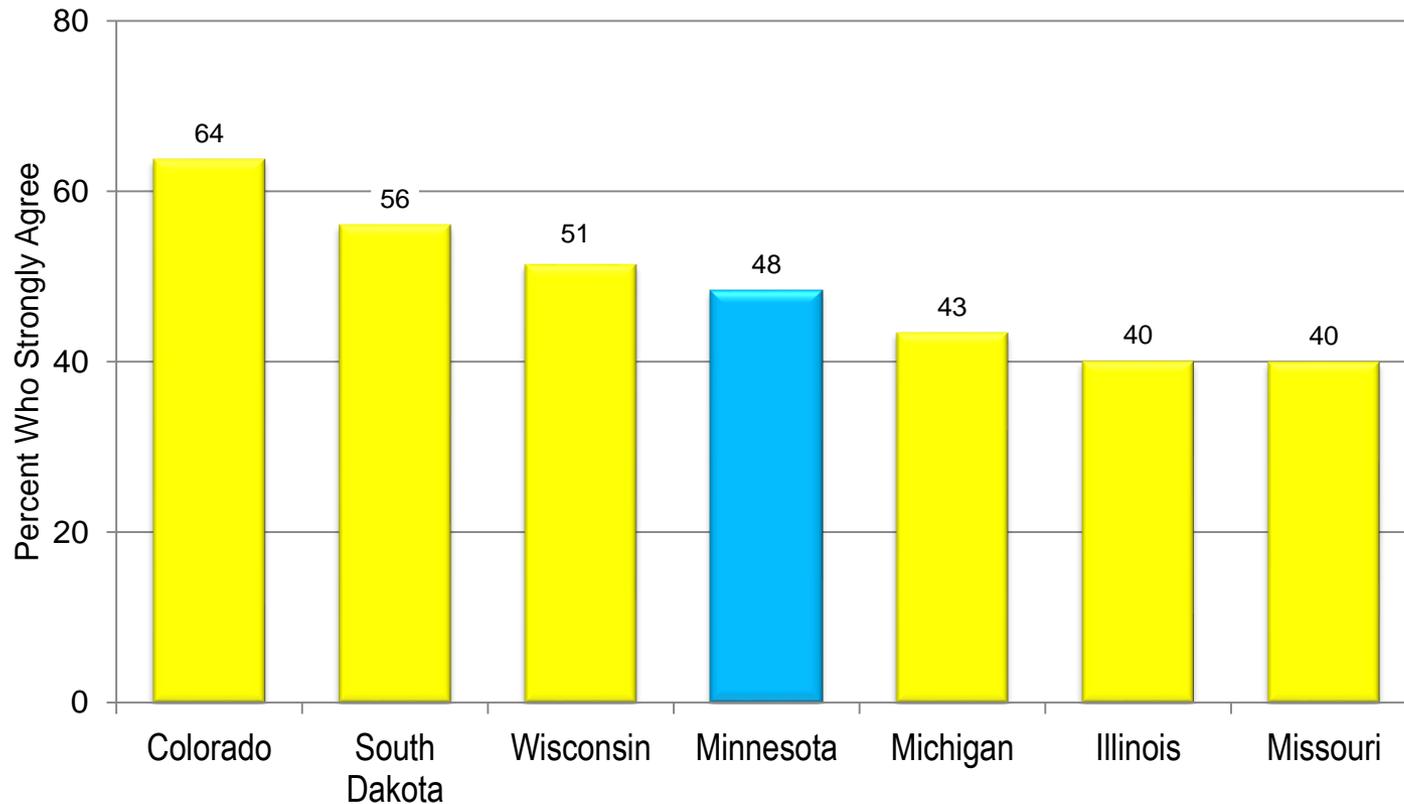
Minnesota's Image vs. Competition — Sightseeing

Base: Residents of Minnesota's Regional Advertising Markets



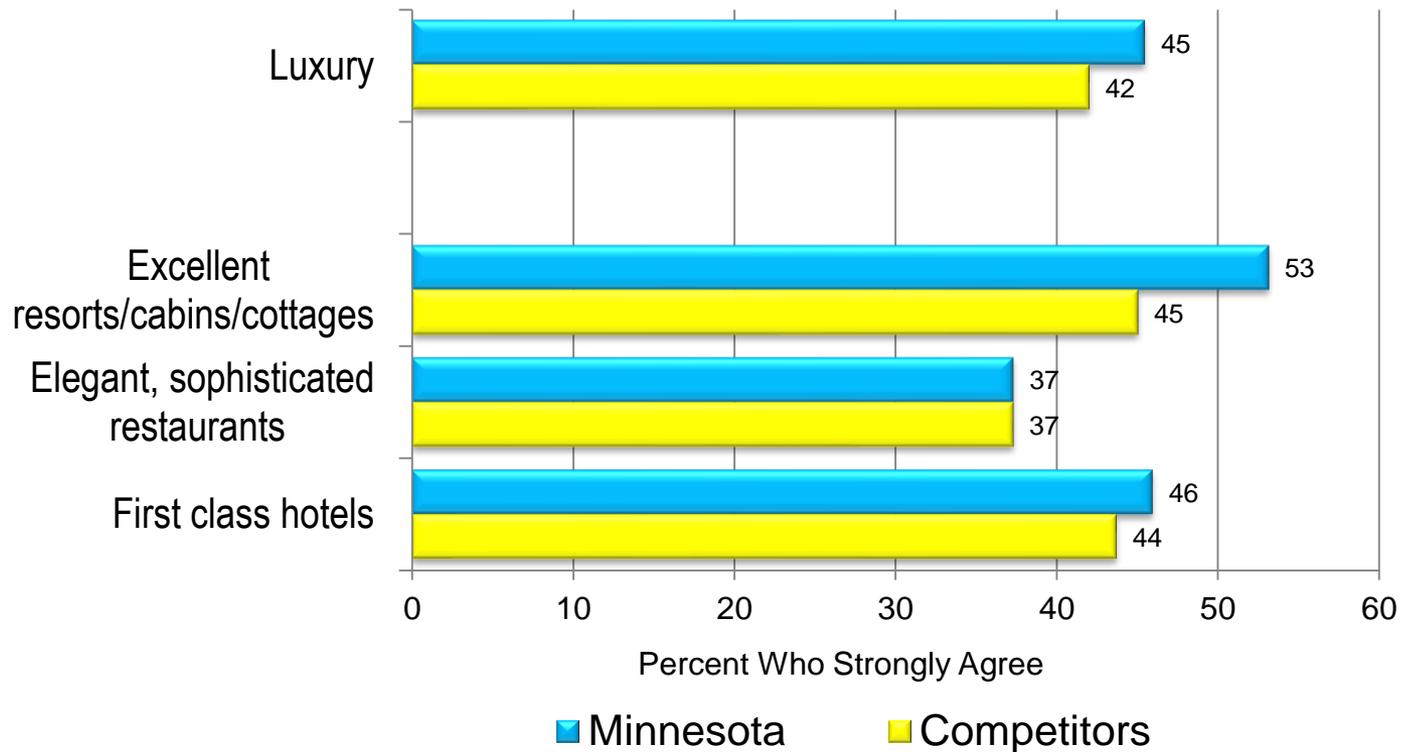
Minnesota's Image vs. Competition — Sightseeing

Base: Residents of Minnesota's Regional Advertising Markets



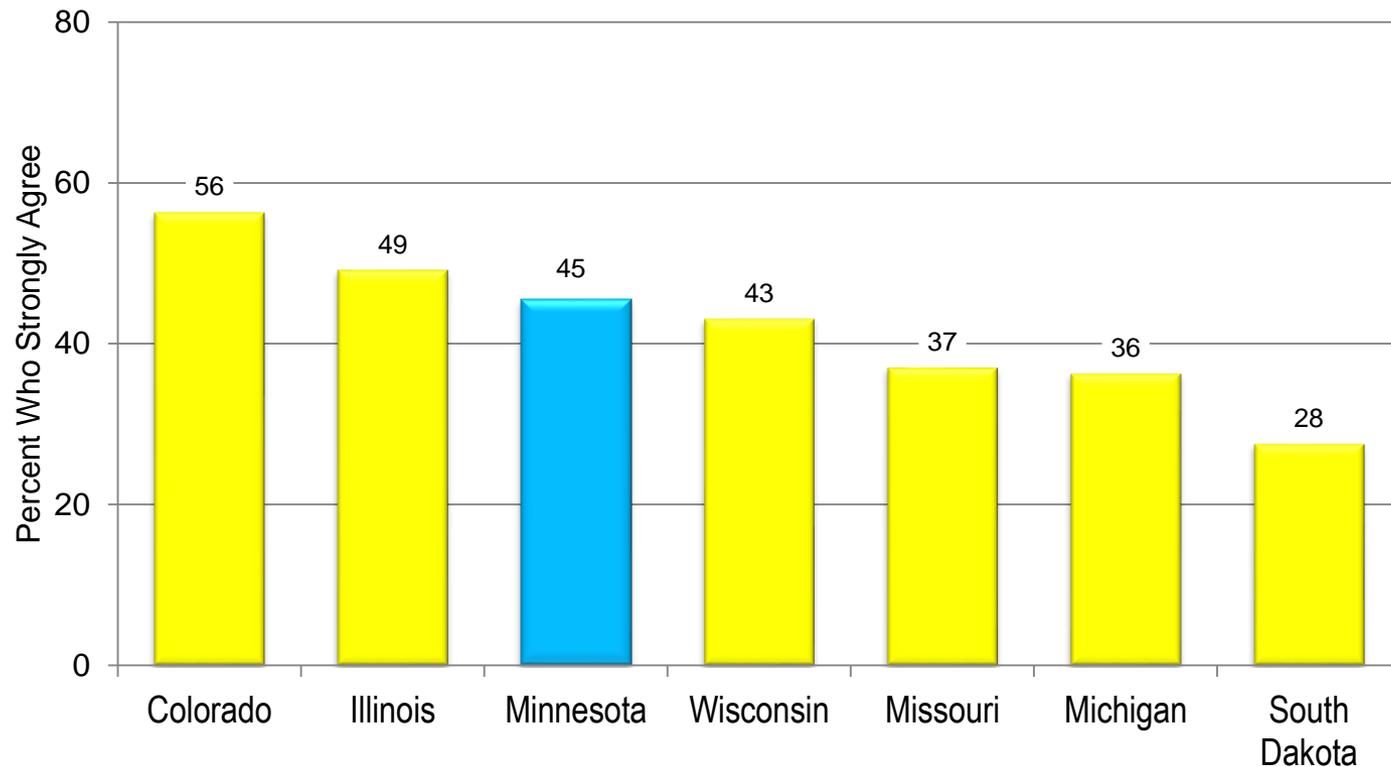
Minnesota's Image vs. Competition — Luxury

Base: Residents of Minnesota's Regional Advertising Markets



Minnesota's Image vs. Competition — Luxury

Base: Residents of Minnesota's Regional Advertising Markets



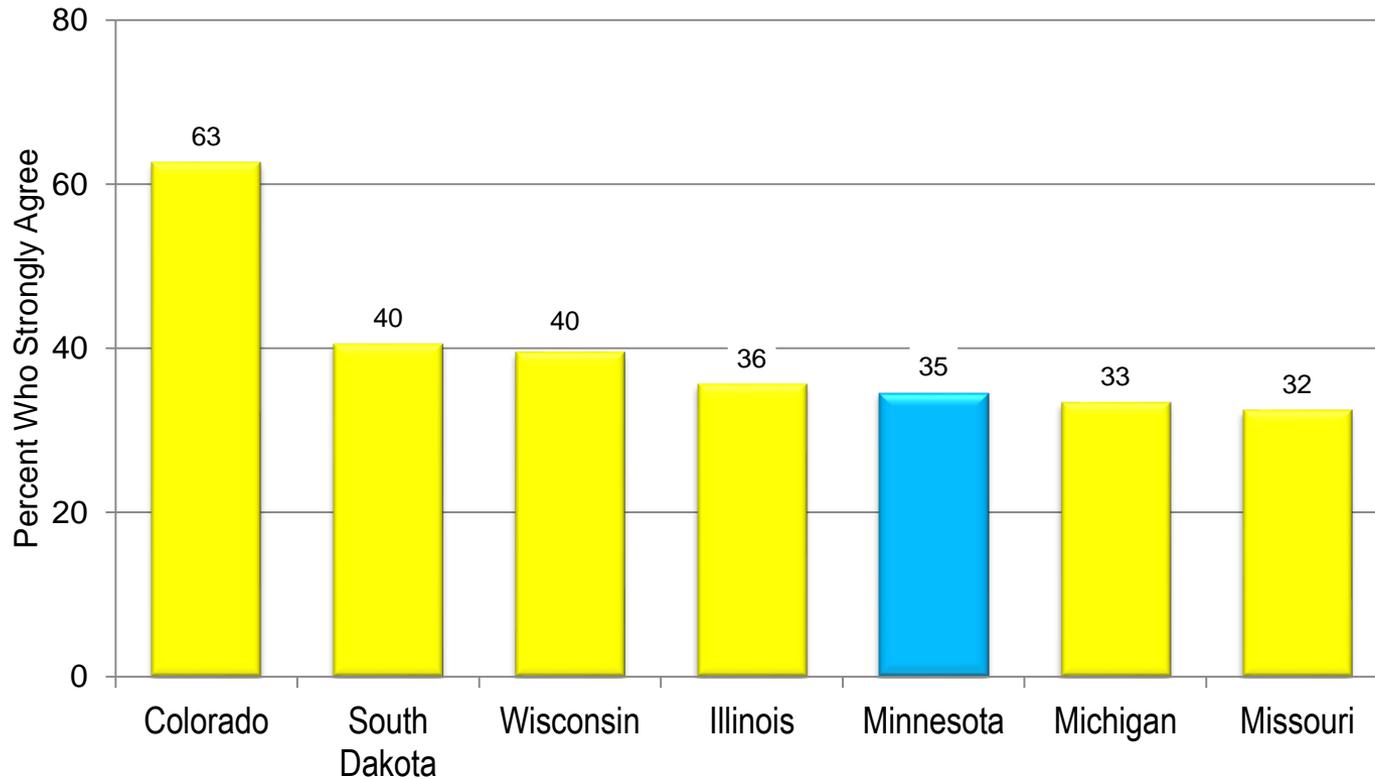
Minnesota's Image vs. Competition — Popular

Base: Residents of Minnesota's Regional Advertising Markets



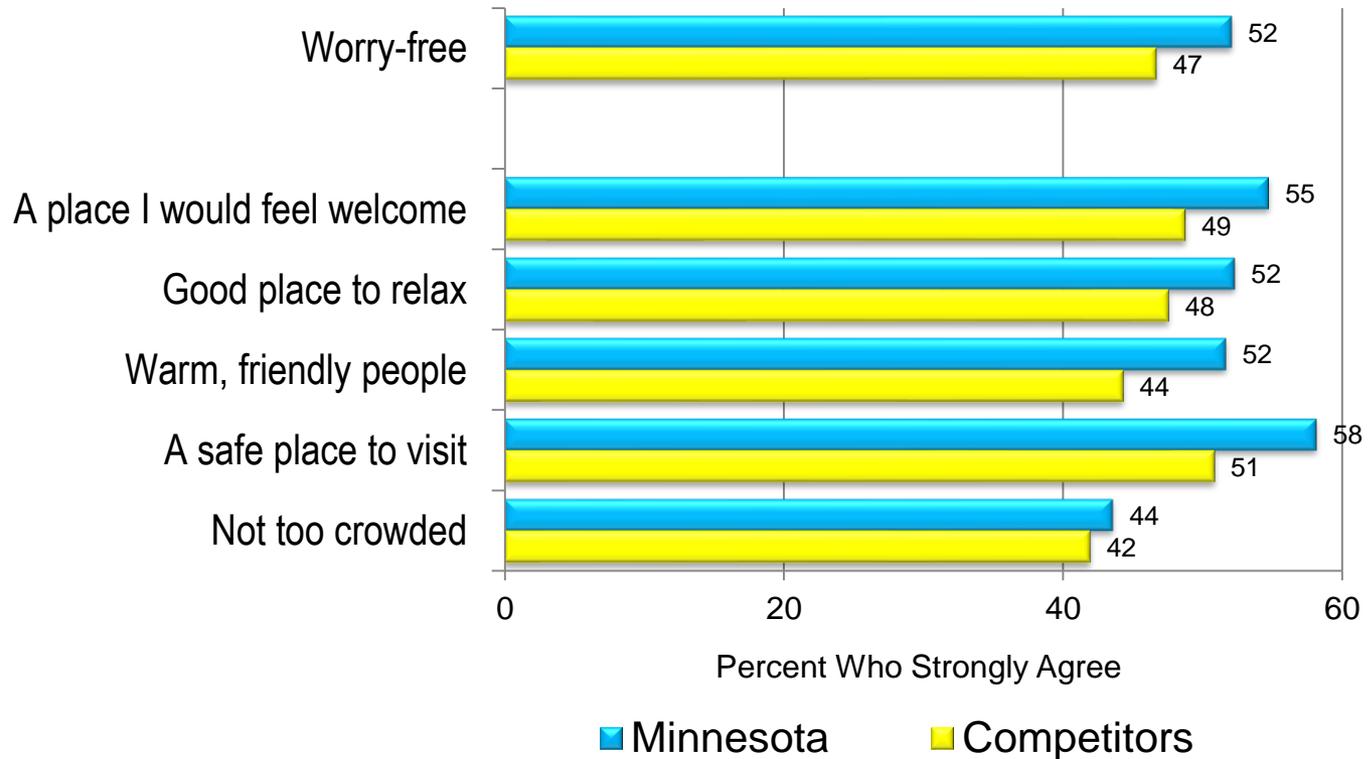
Minnesota's Image vs. Competition — Popular

Base: Residents of Minnesota's Regional Advertising Markets



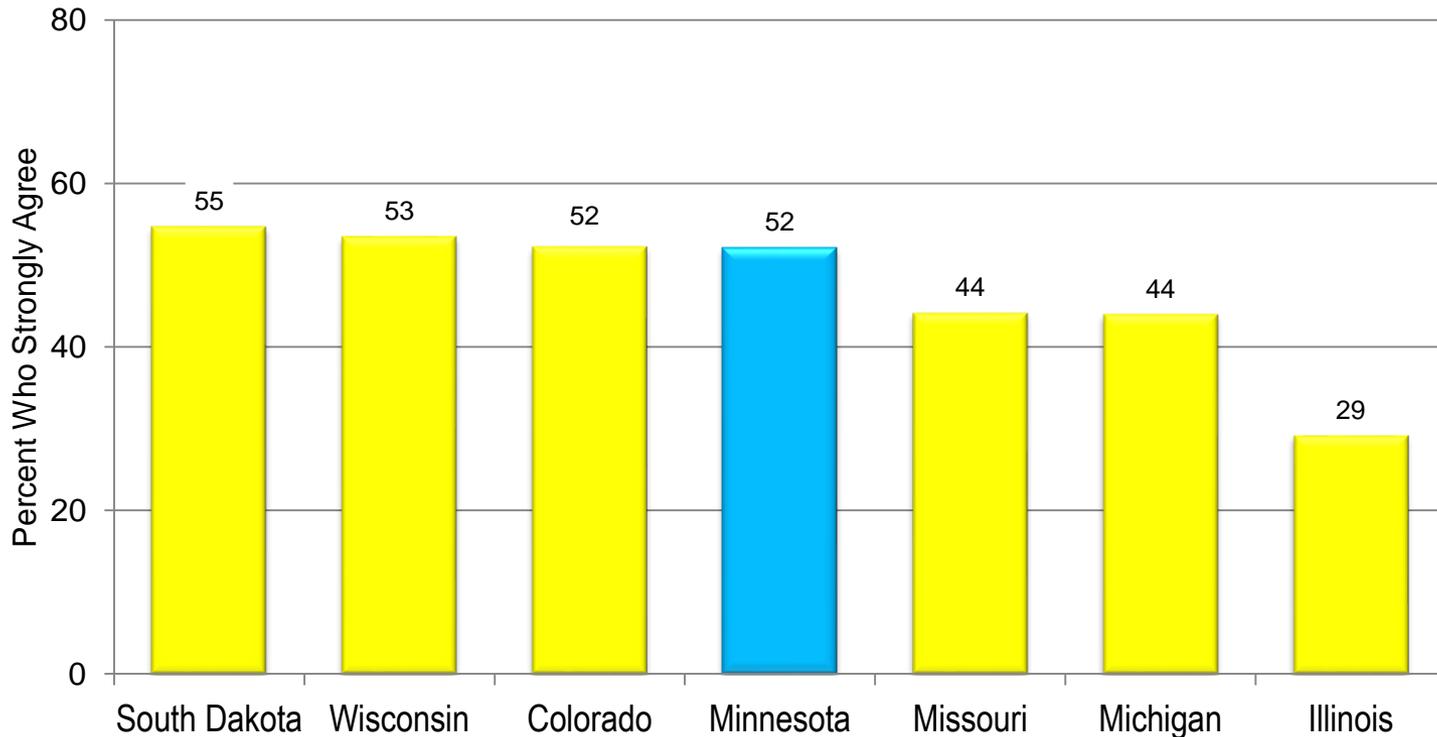
Minnesota's Image vs. Competition — Worry-free

Base: Residents of Minnesota's Regional Advertising Markets



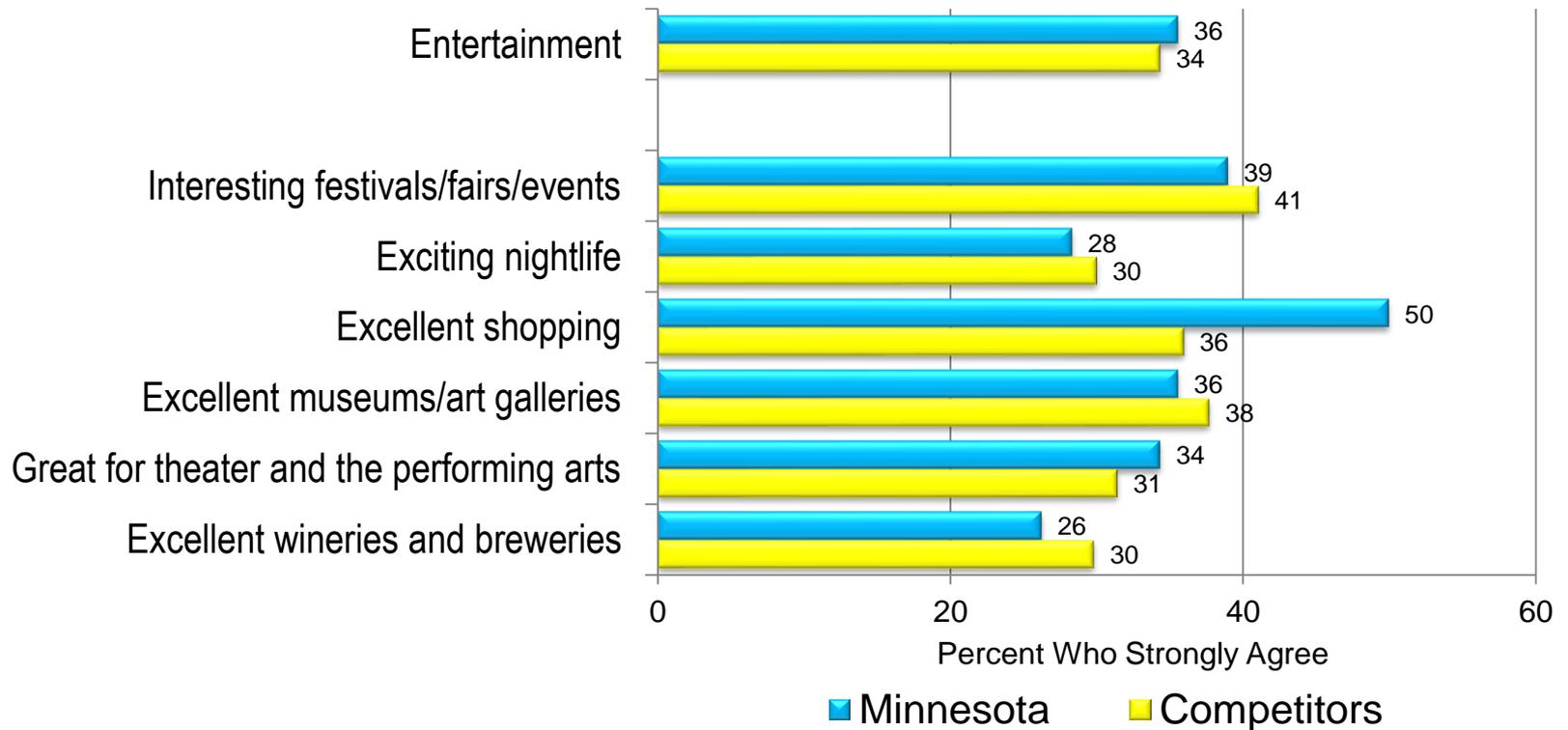
Minnesota's Image vs. Competition — Worry-free

Base: Residents of Minnesota's Regional Advertising Markets



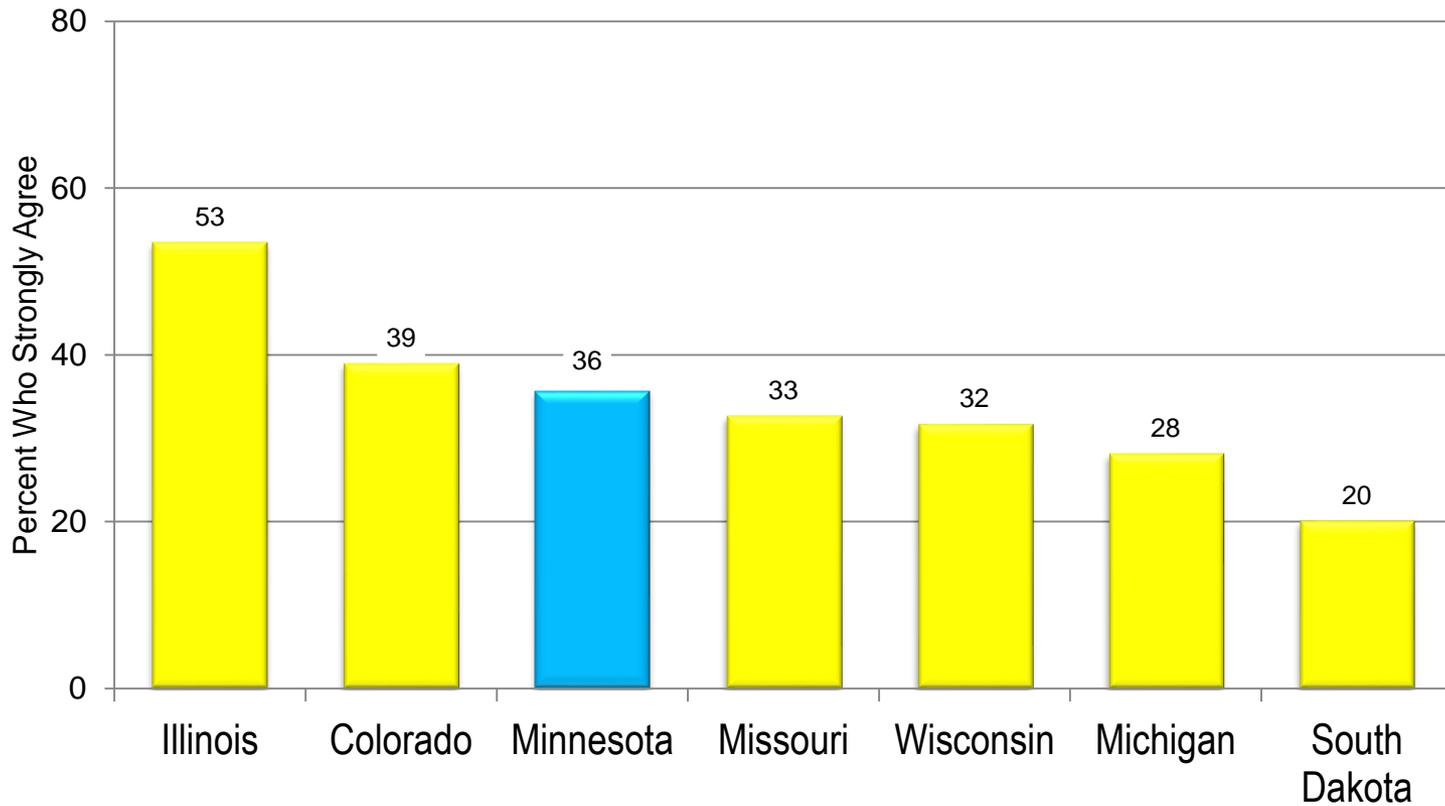
Minnesota's Image vs. Competition — Entertainment

Base: Residents of Minnesota's Regional Advertising Markets



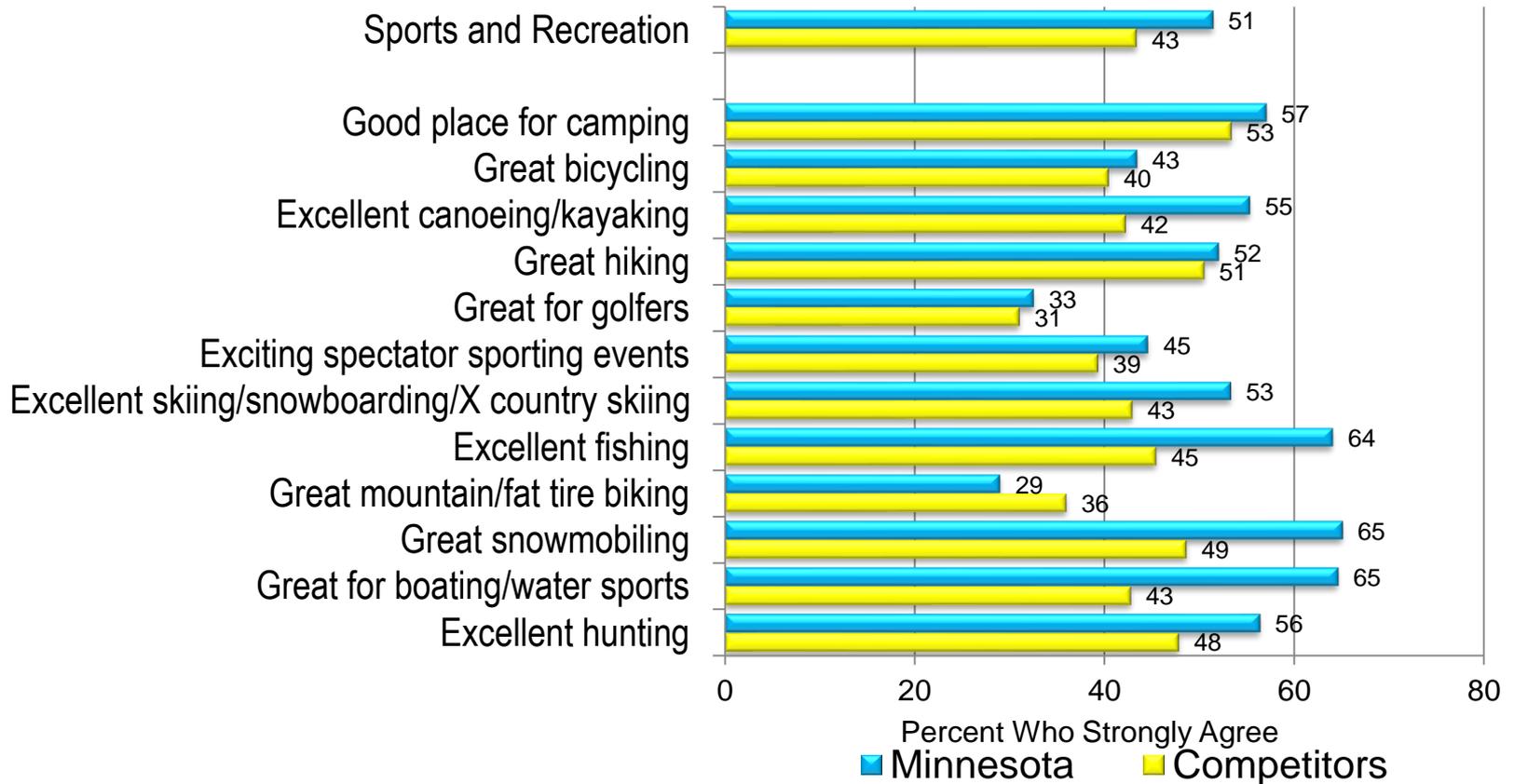
Minnesota's Image vs. Competition — Entertainment

Base: Residents of Minnesota's Regional Advertising Markets



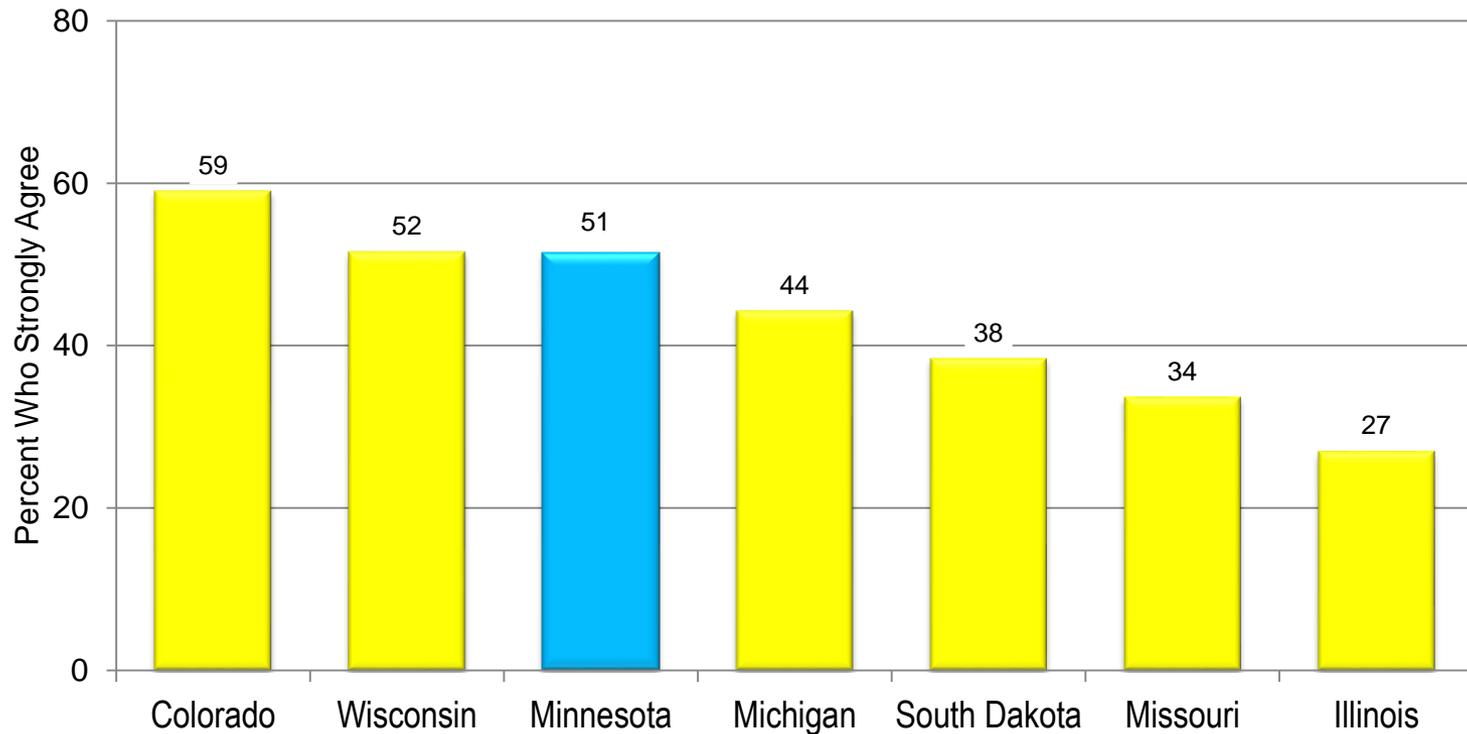
Minnesota's Image vs. Competition — Sports and Recreation

Base: Residents of Minnesota's Regional Advertising Markets



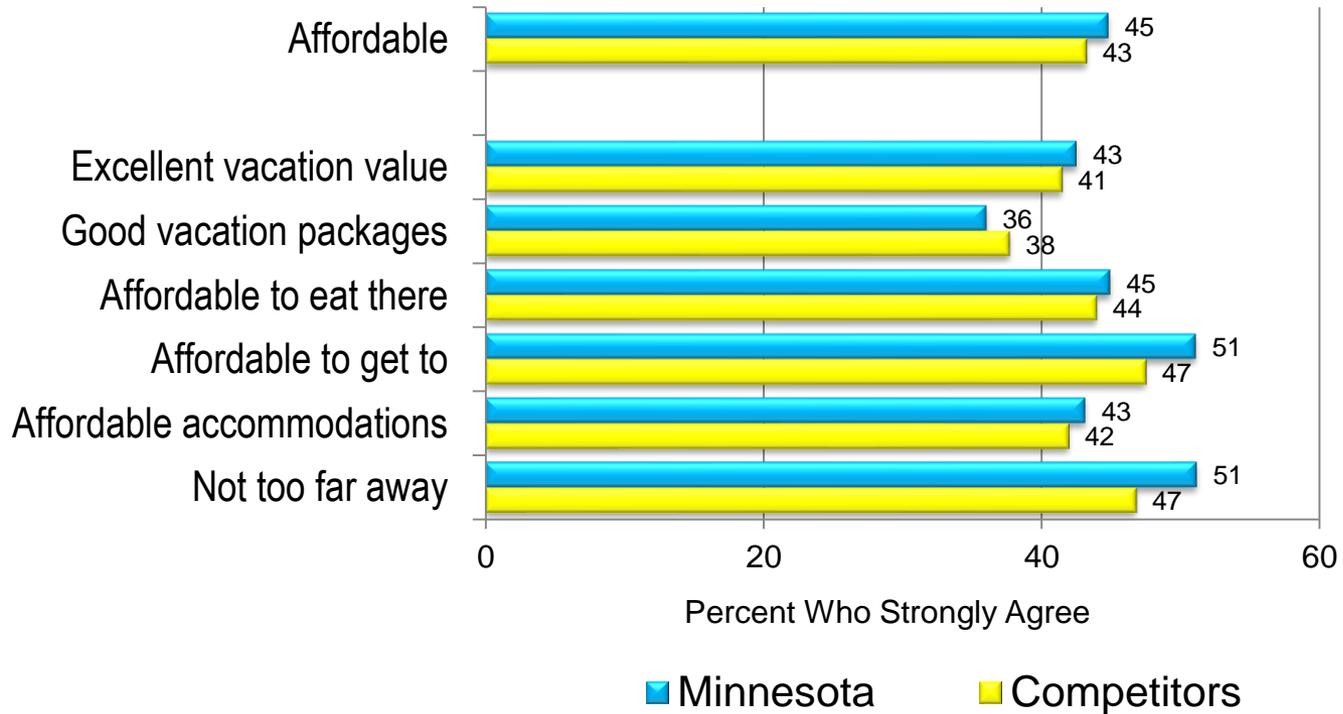
Minnesota's Image vs. Competition — Sports and Recreation

Base: Residents of Minnesota's Regional Advertising Markets



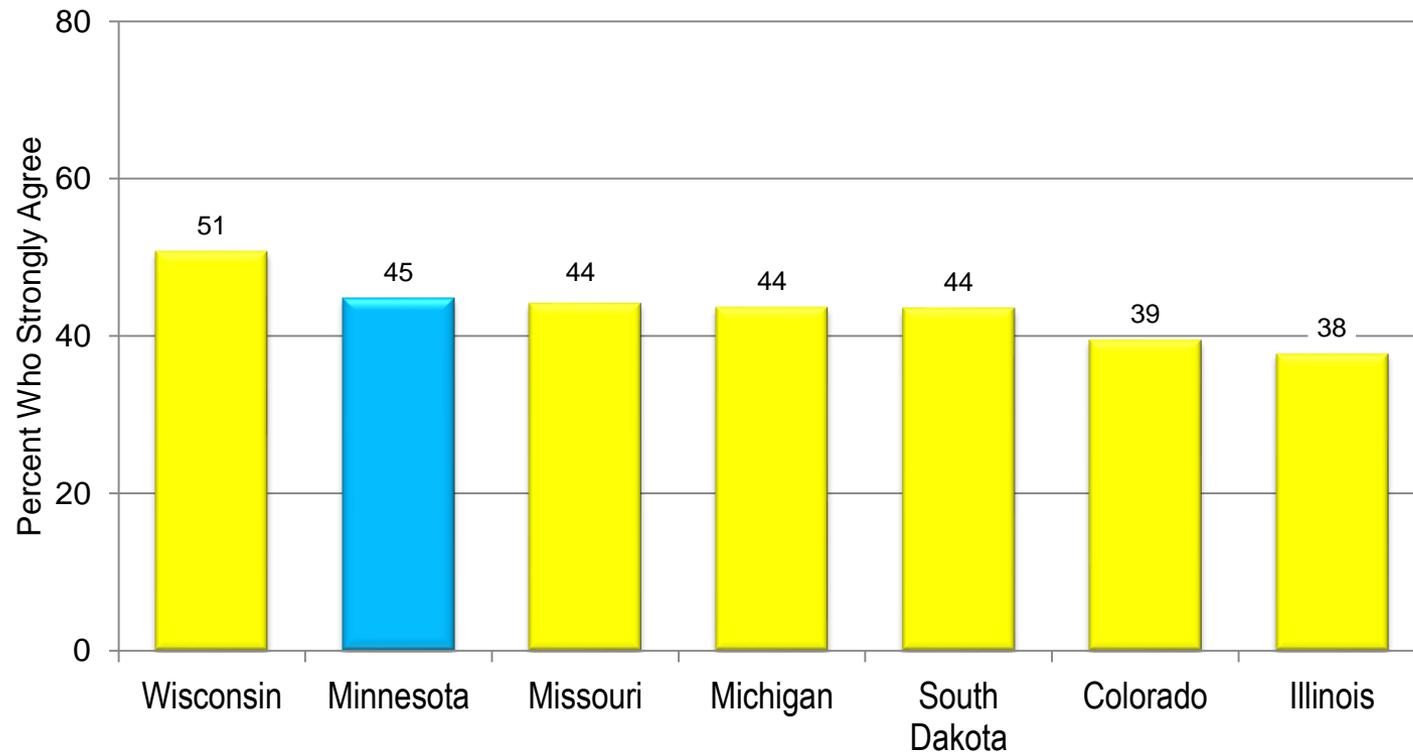
Minnesota's Image vs. Competition — Affordable

Base: Residents of Minnesota's Regional Advertising Markets



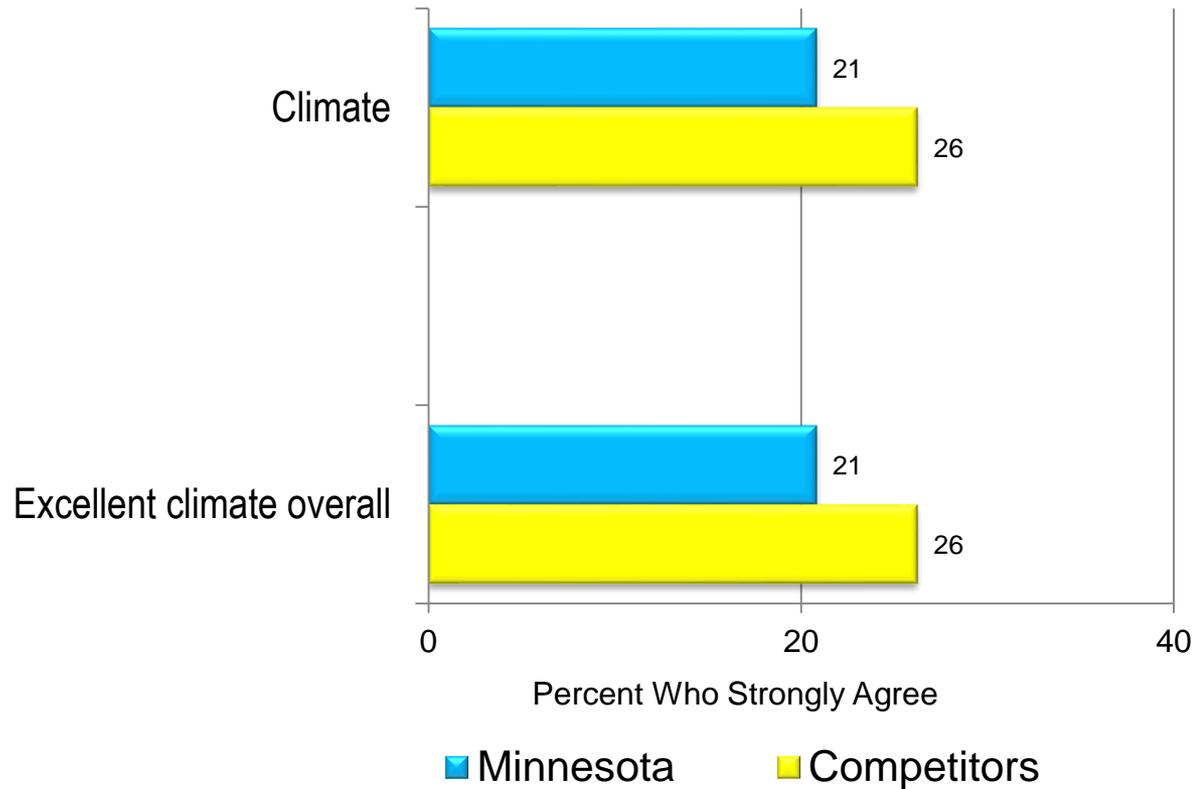
Minnesota's Image vs. Competition — Affordable

Base: Residents of Minnesota's Regional Advertising Markets



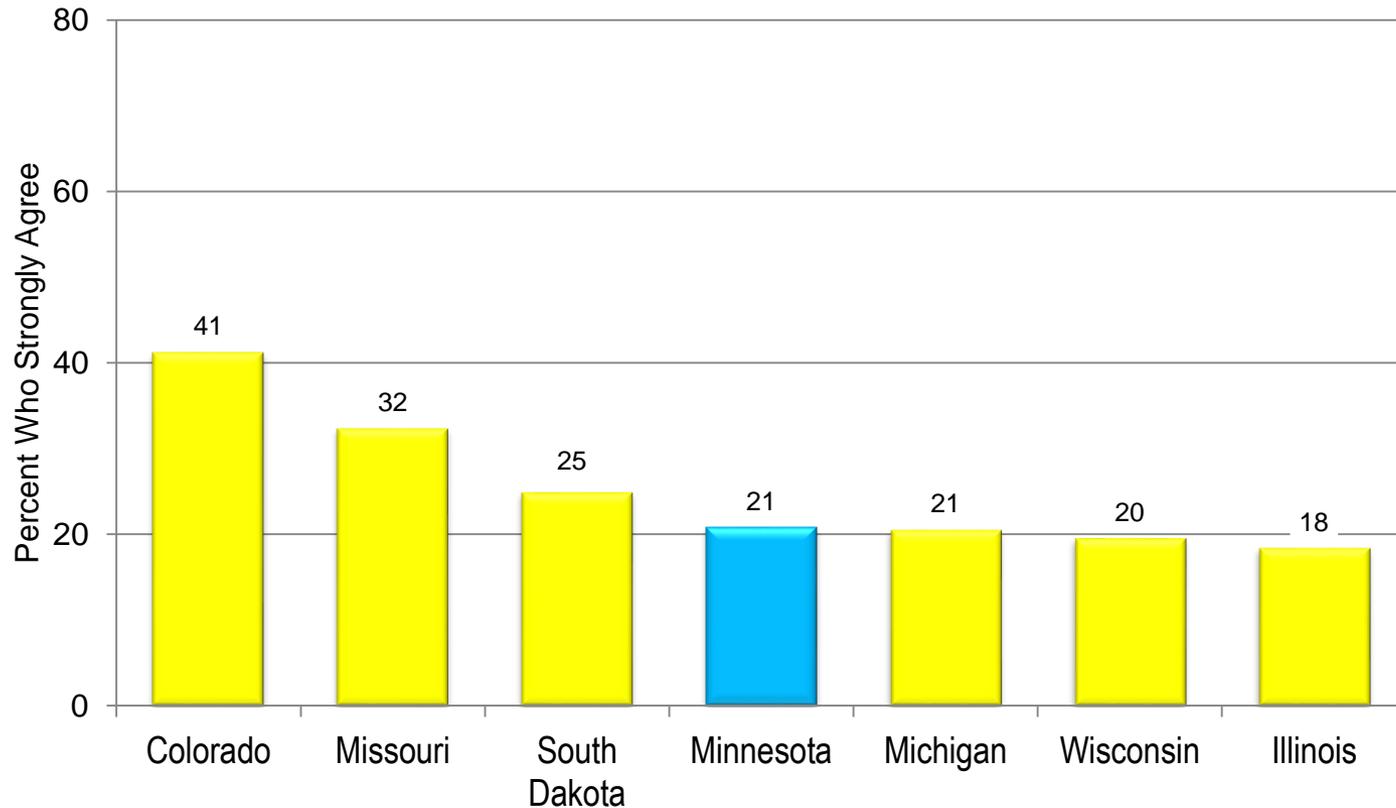
Minnesota's Image vs. Competition — Climate

Base: Residents of Minnesota's Regional Advertising Markets



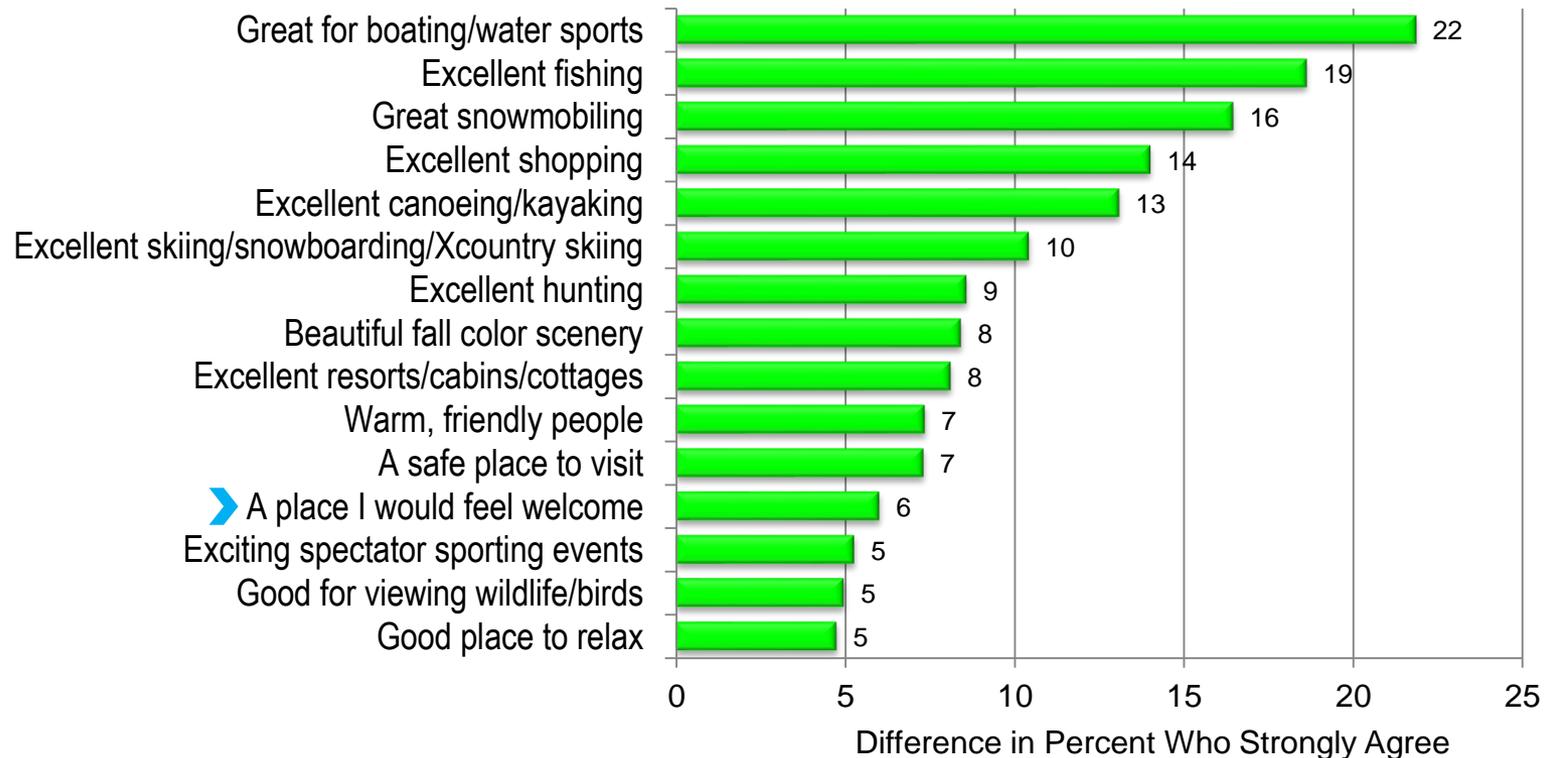
Minnesota's Image vs. Competition — Climate

Base: Residents of Minnesota's Regional Advertising Markets



Minnesota's Image Strengths vs. Competition

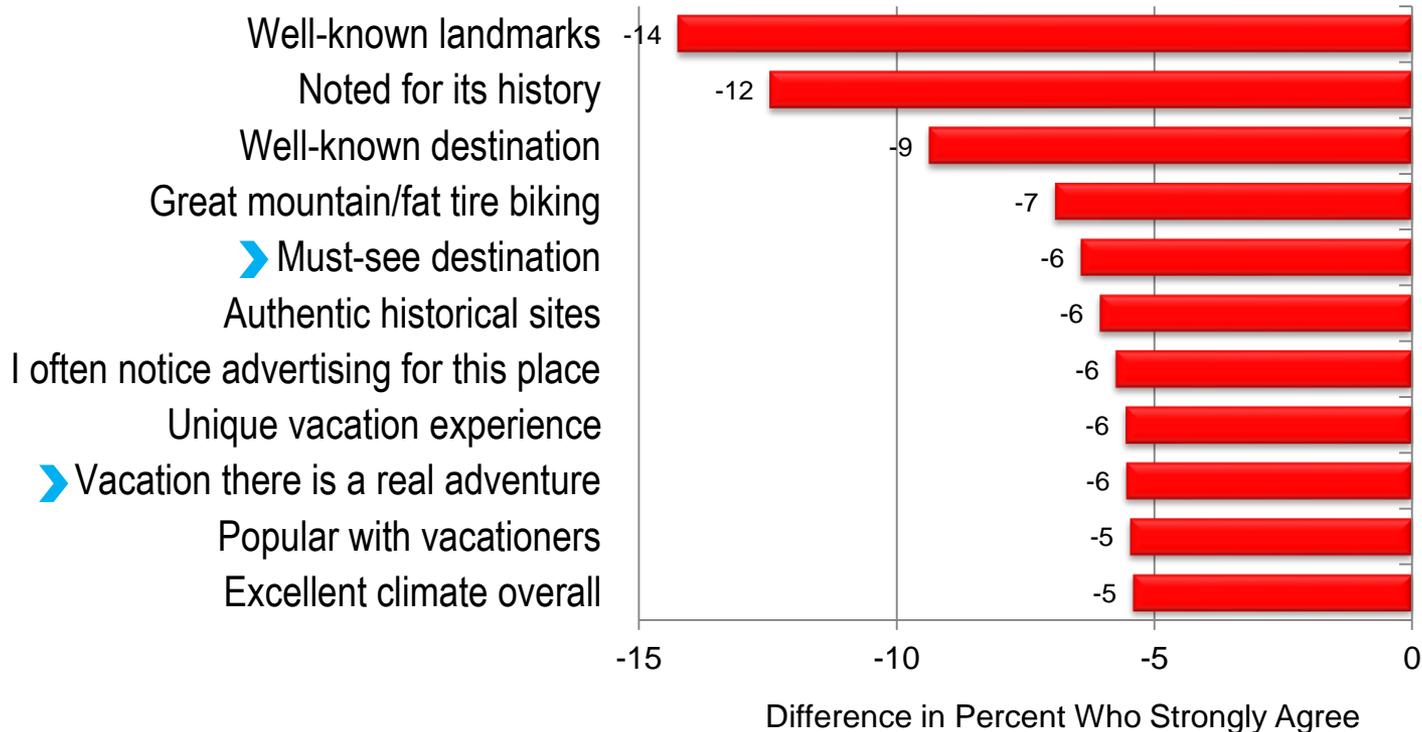
Base: Residents of Minnesota's Regional Advertising Markets



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

Minnesota's Image Weaknesses vs. Competition

Base: Residents of Minnesota's Regional Advertising Markets



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

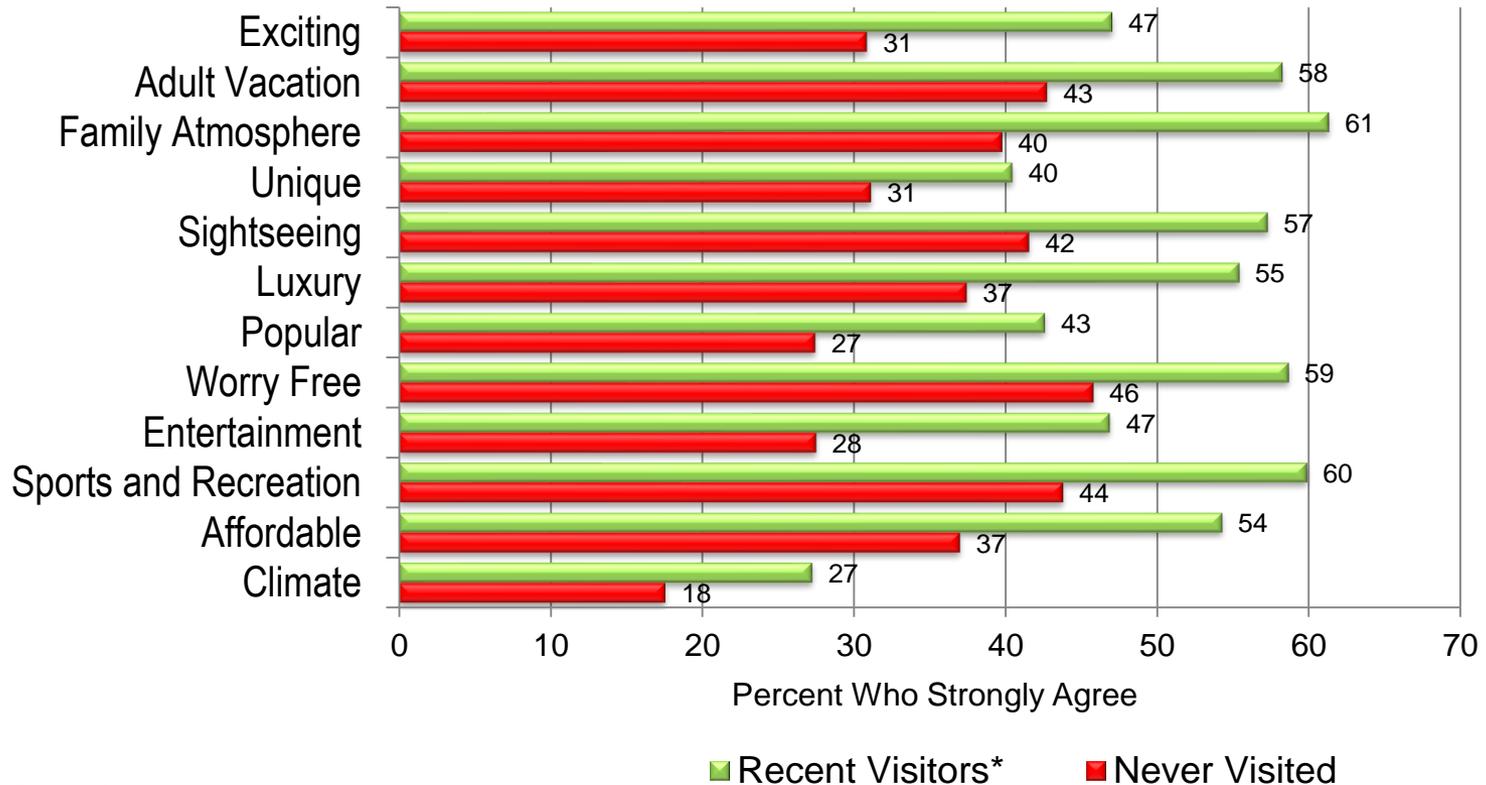


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Minnesota's Product Delivery

Minnesota's Product vs. Image

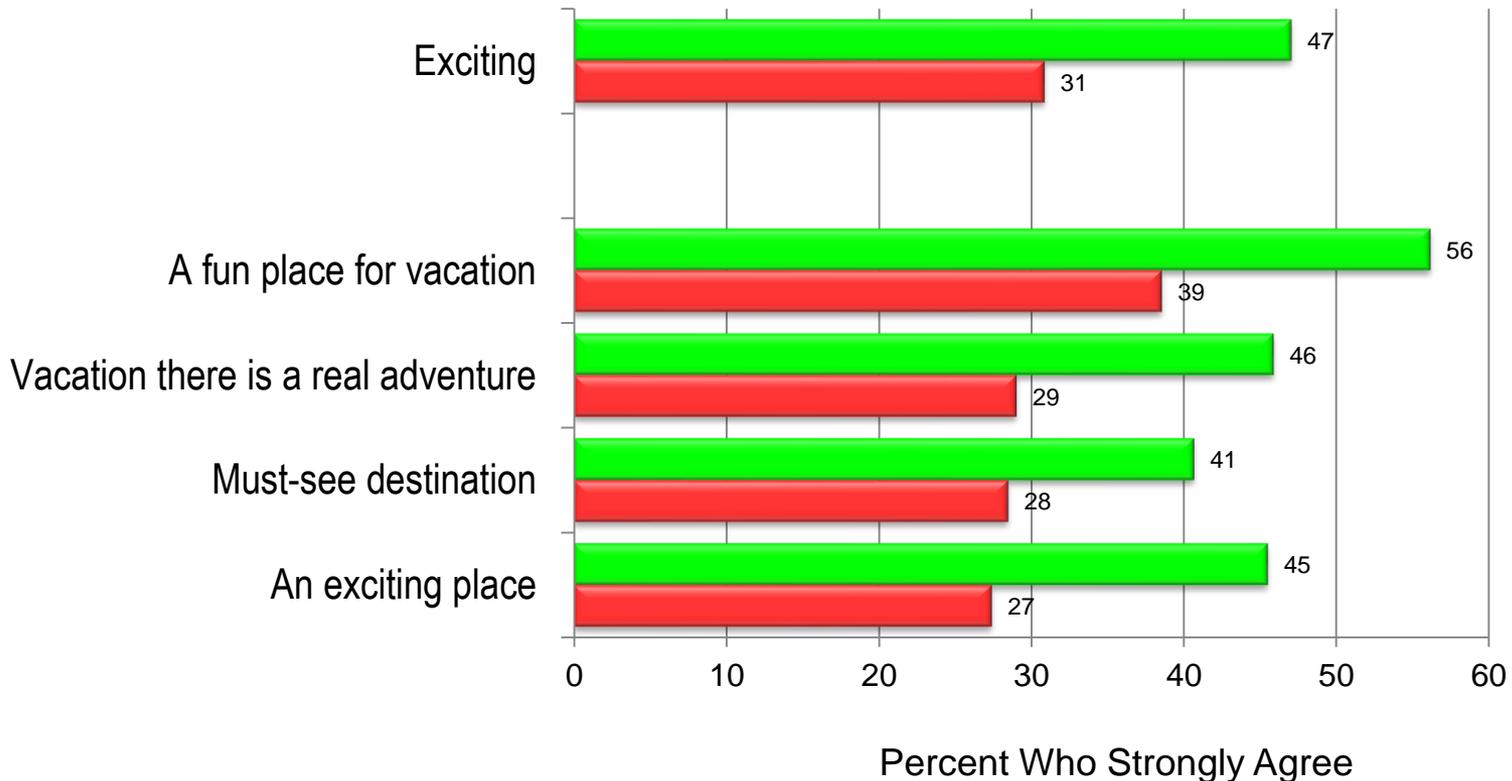
Base: Residents of Minnesota's Regional Advertising Markets



* Visited in past two years

Minnesota's Product Delivery vs. Image — Exciting

Base: Residents of Minnesota's Regional Advertising Markets



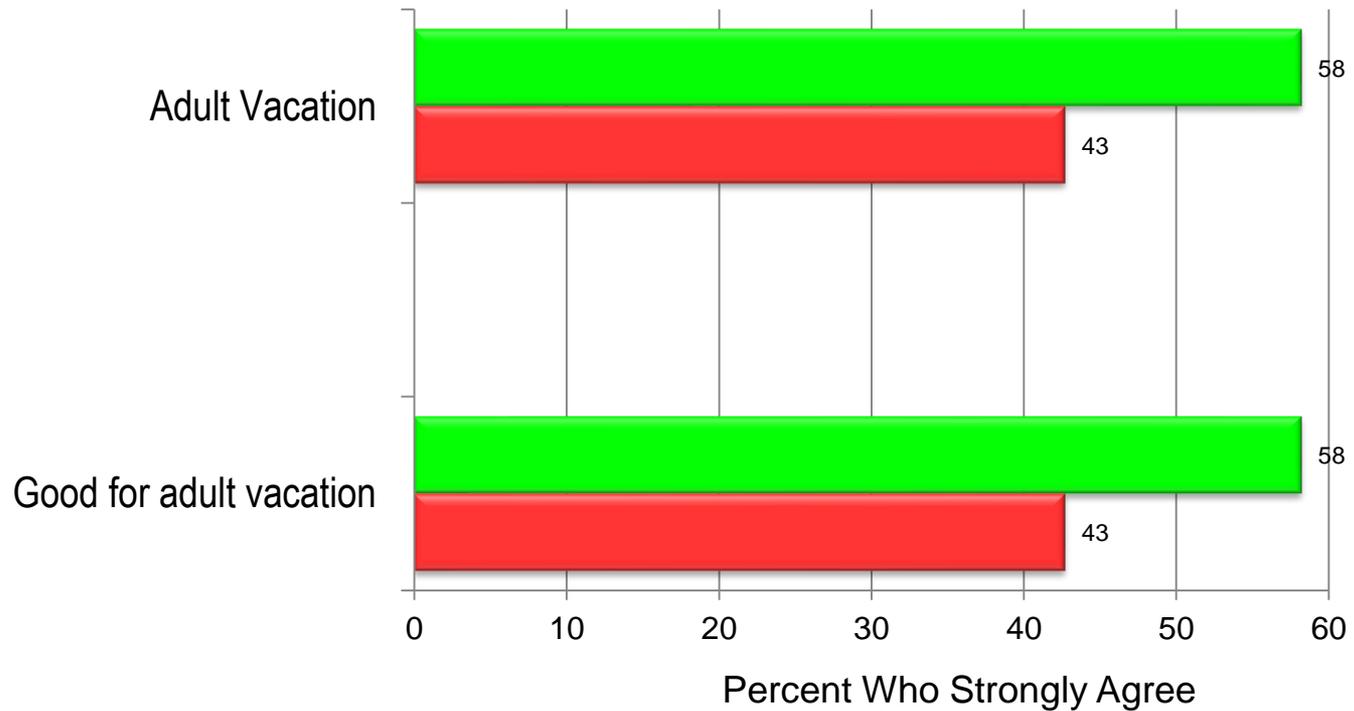
* Visited in past two years

■ Recent Visitors*

■ Never Visited

Minnesota's Product Delivery vs. Image — Adult Vacation

Base: Residents of Minnesota's Regional Advertising Markets



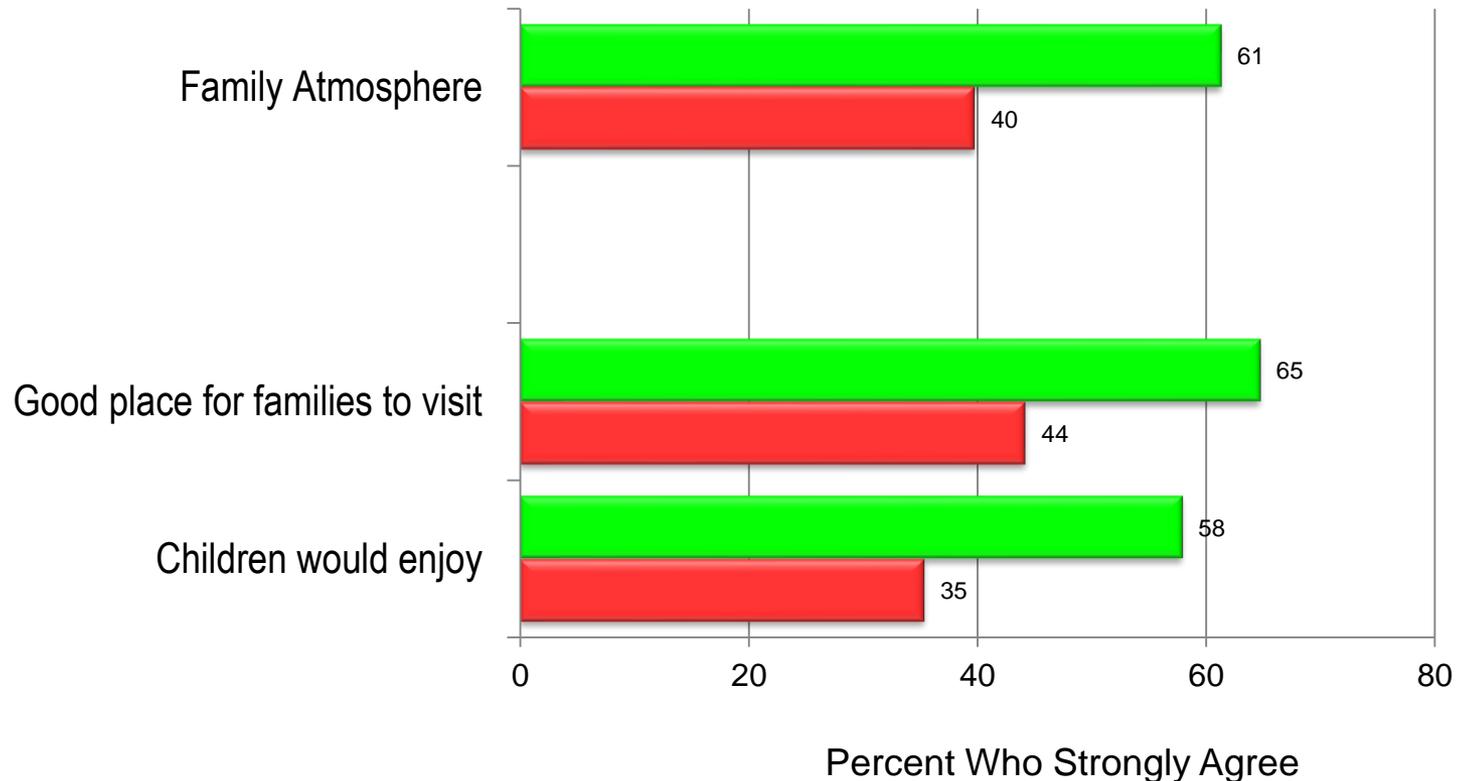
* Visited in past two years

■ Recent Visitors*

■ Never Visited

Minnesota's Product Delivery vs. Image — Family Atmosphere

Base: Residents of Minnesota's Regional Advertising Markets



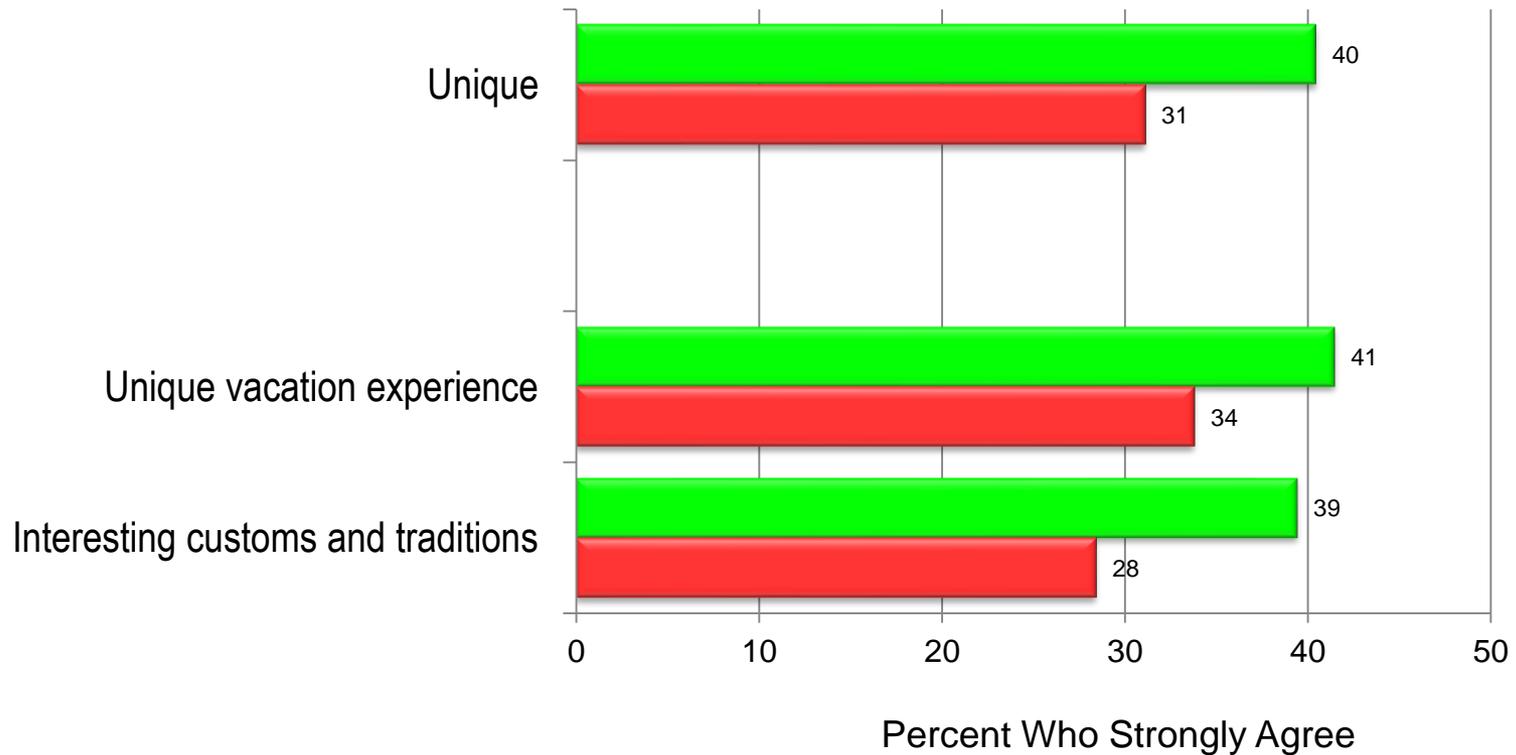
* Visited in past two years

■ Recent Visitors*

■ Never Visited

Minnesota's Product Delivery vs. Image — Unique

Base: Residents of Minnesota's Regional Advertising Markets



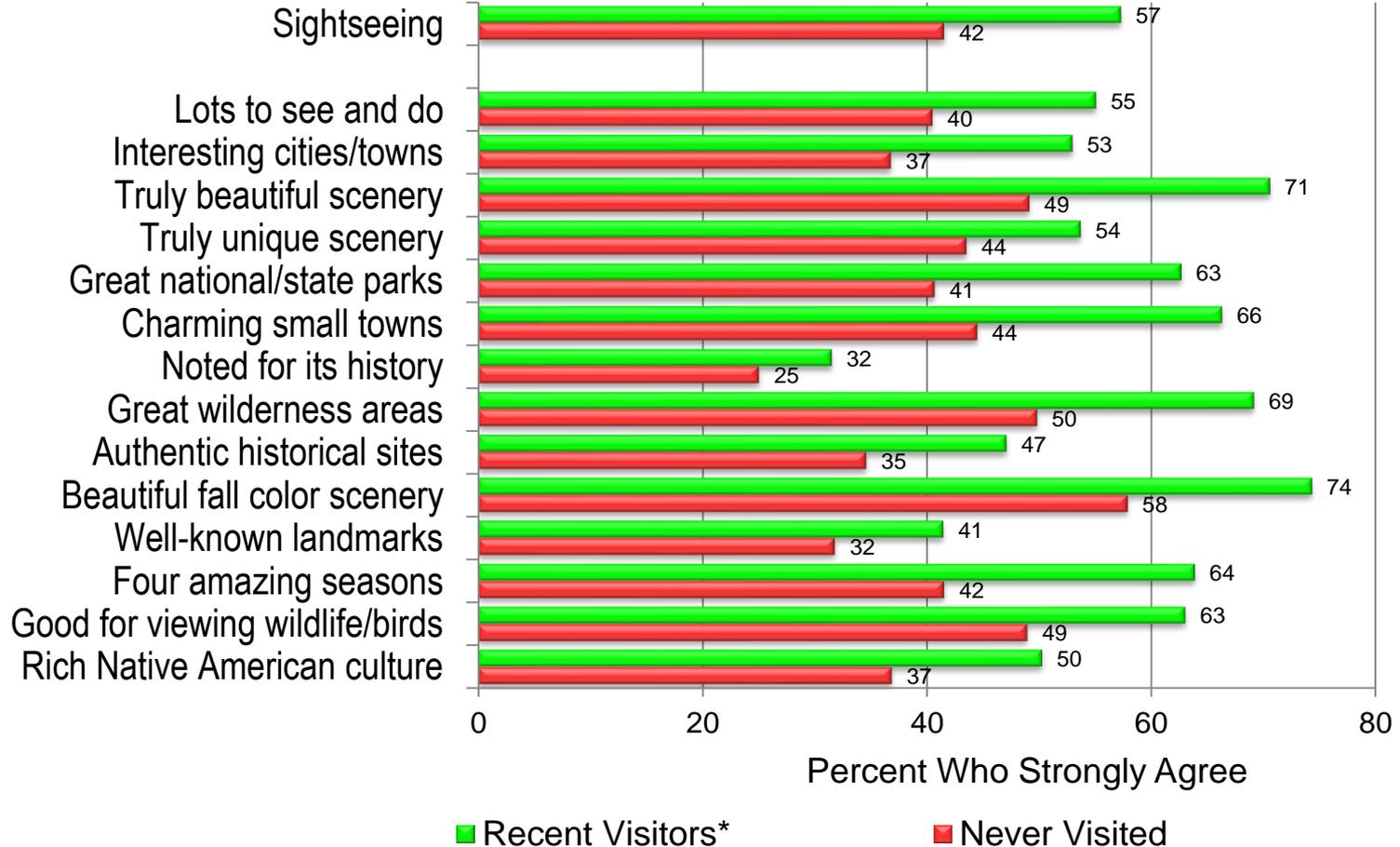
* Visited in past two years

■ Recent Visitors*

■ Never Visited

Minnesota's Product Delivery vs. Image — Sightseeing

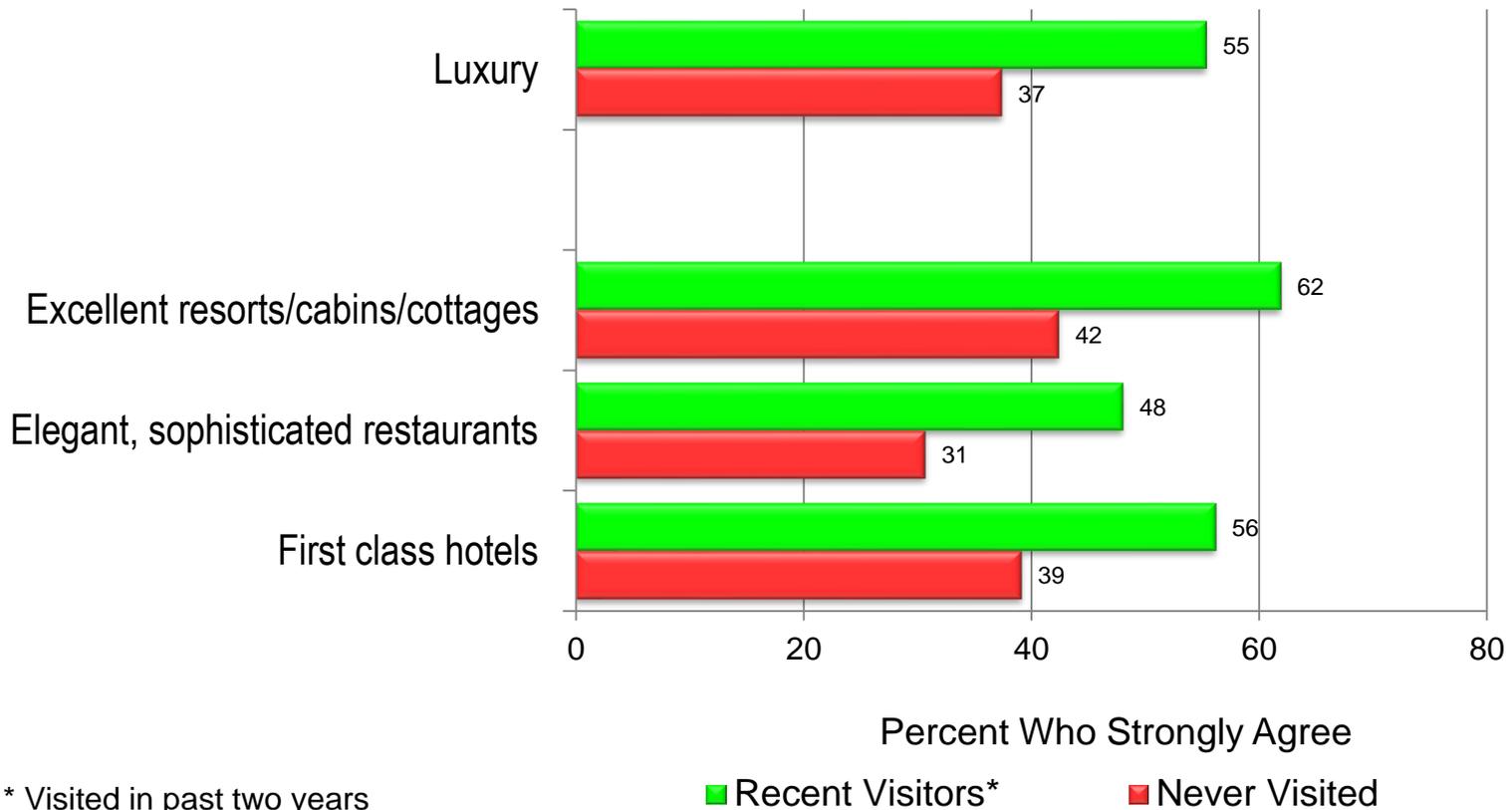
Base: Residents of Minnesota's Regional Advertising Markets



* Visited in past two years

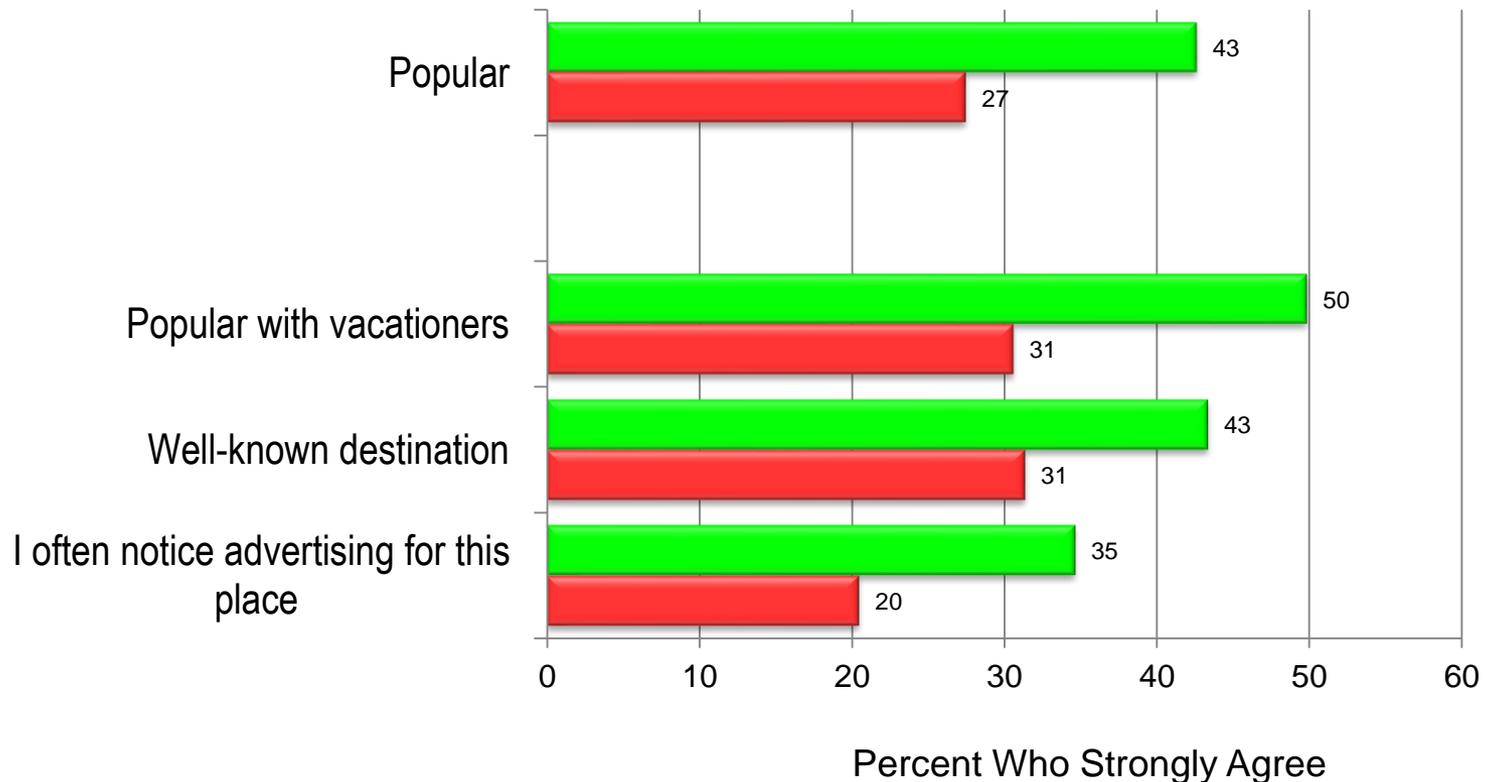
Minnesota's Product Delivery vs. Image — Luxury

Base: Residents of Minnesota's Regional Advertising Markets



Minnesota's Product Delivery vs. Image — Popular

Base: Residents of Minnesota's Regional Advertising Markets

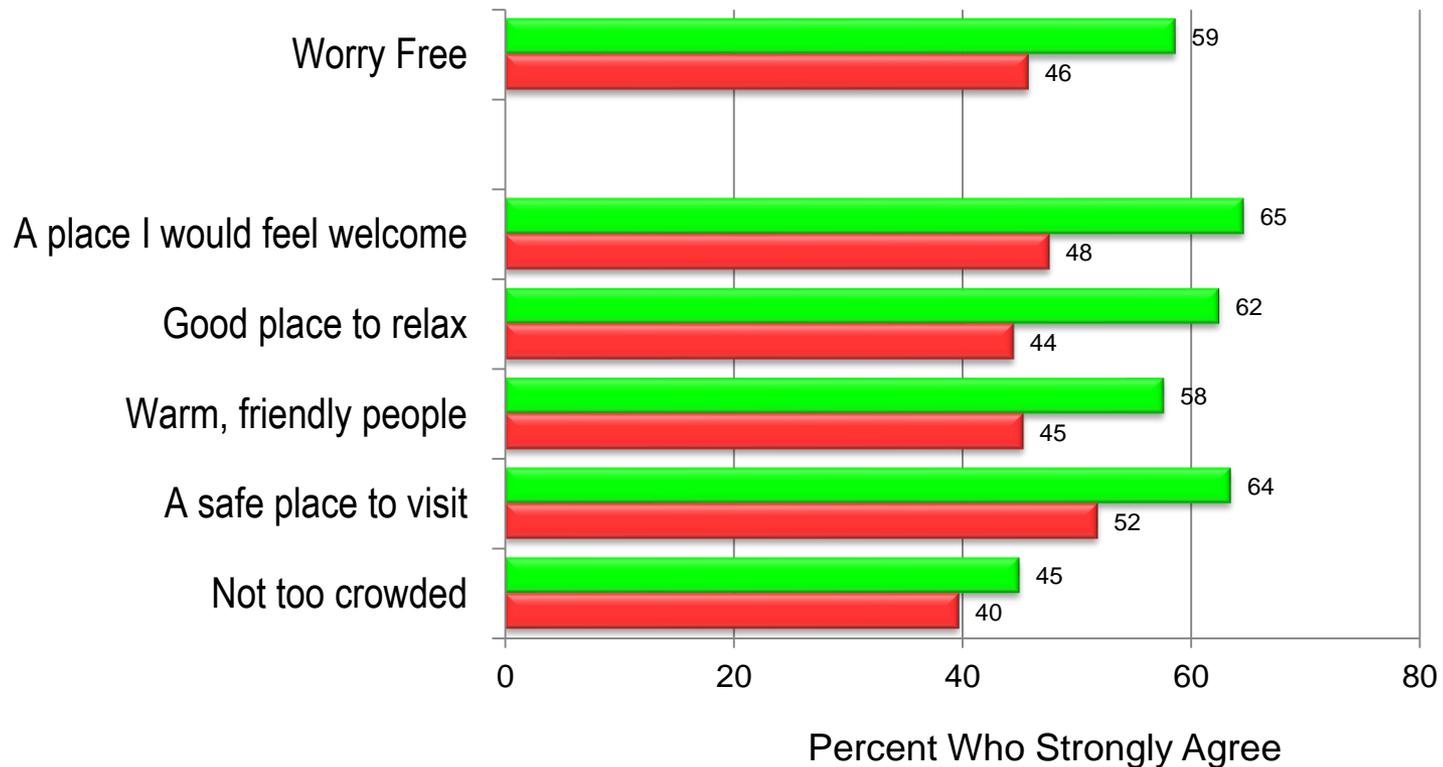


* Visited in past two years

■ Recent Visitors* ■ Never Visited

Minnesota's Product Delivery vs. Image — Worry Free

Base: Residents of Minnesota's Regional Advertising Markets



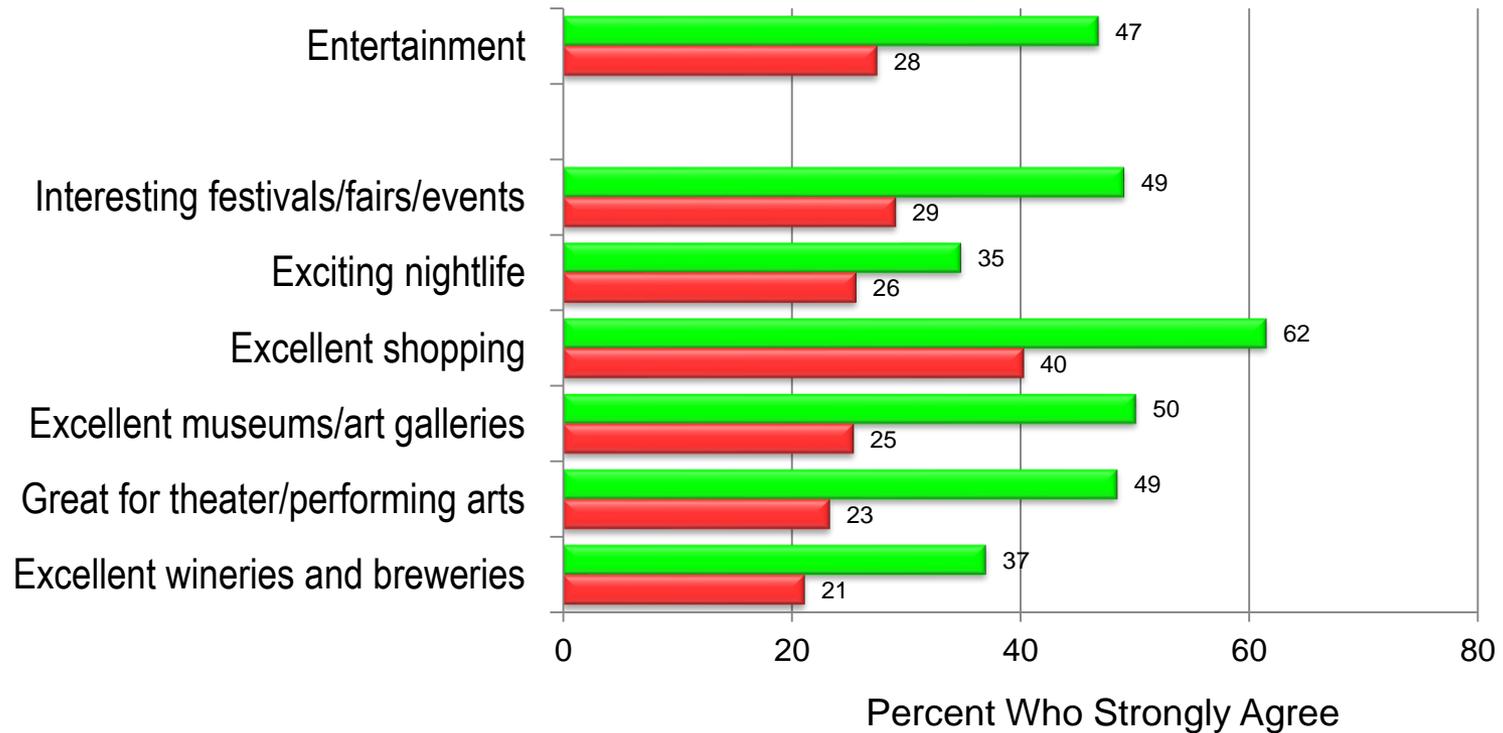
* Visited in past two years

■ Recent Visitors*

■ Never Visited

Minnesota's Product Delivery vs. Image — Entertainment

Base: Residents of Minnesota's Regional Advertising Markets



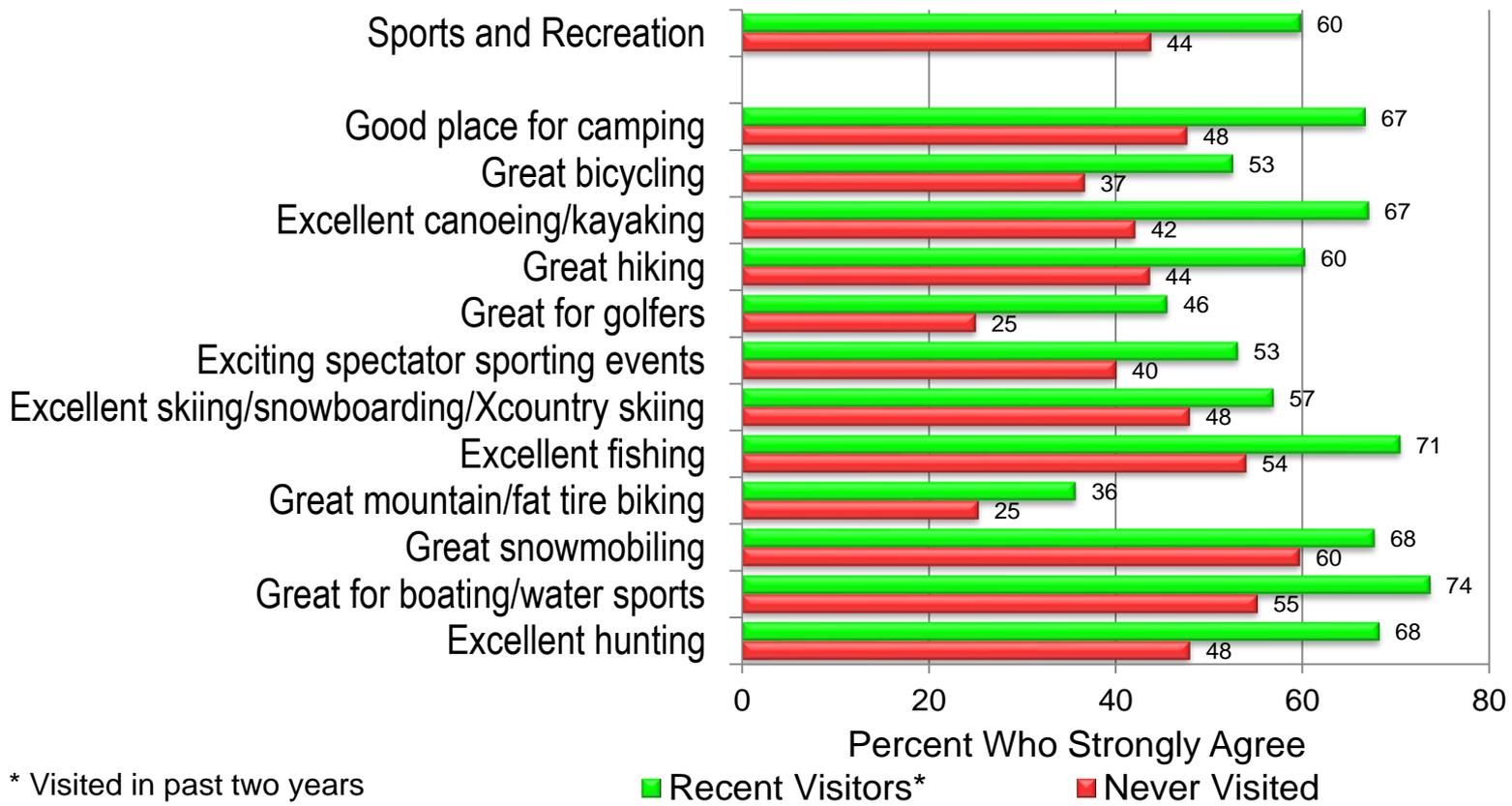
* Visited in past two years

■ Recent Visitors*

■ Never Visited

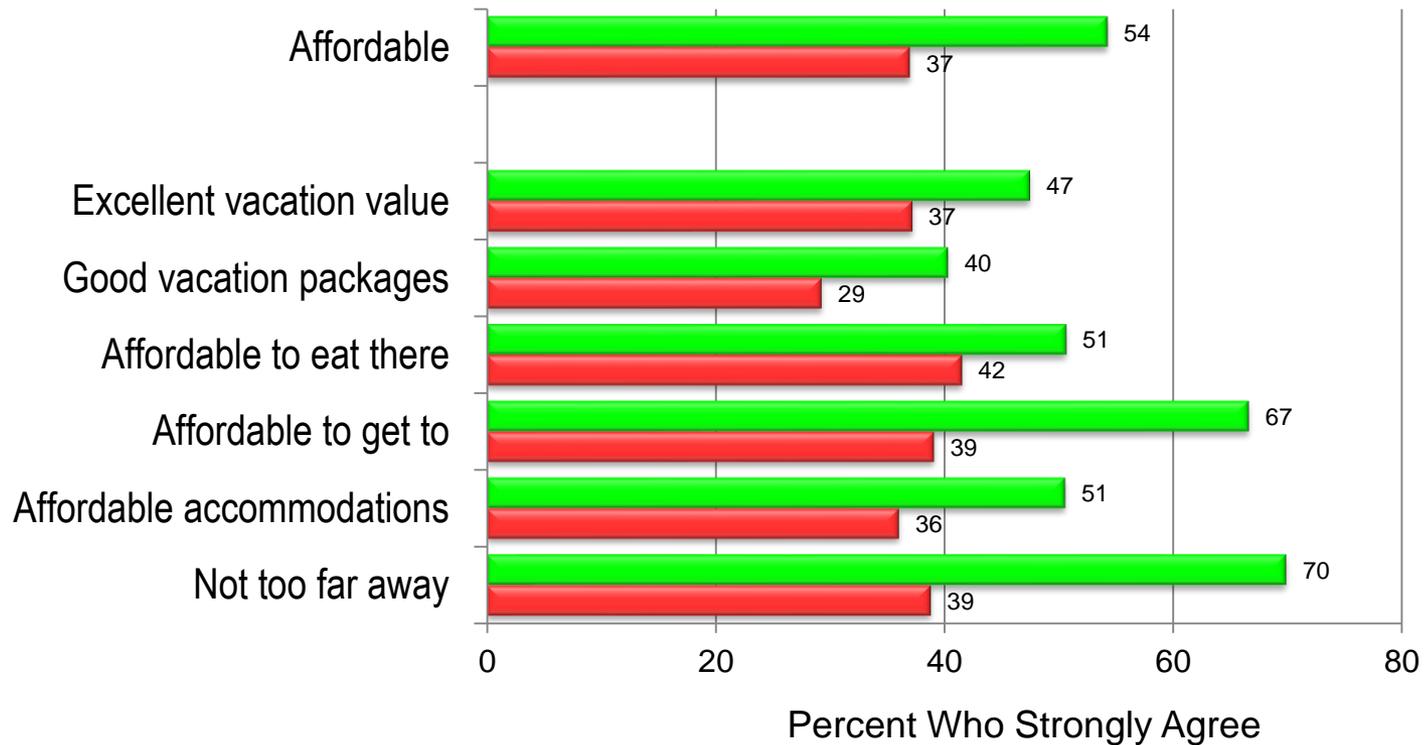
Minnesota's Product Delivery vs. Image — Sports and Recreation

Base: Residents of Minnesota's Regional Advertising Markets



Minnesota's Product Delivery vs. Image — Affordable

Base: Residents of Minnesota's Regional Advertising Markets



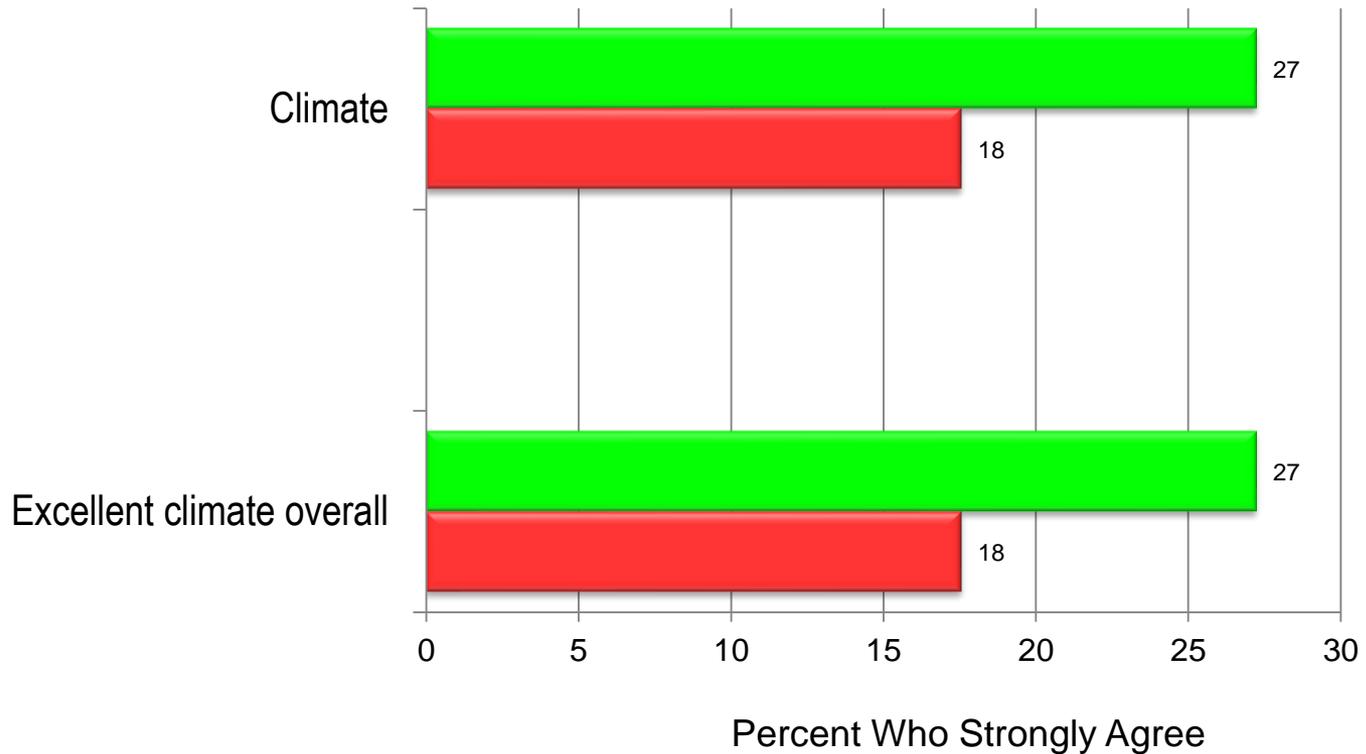
* Visited in past two years

■ Recent Visitors*

■ Never Visited

Minnesota's Product Delivery vs. Image — Climate

Base: Residents of Minnesota's Regional Advertising Markets

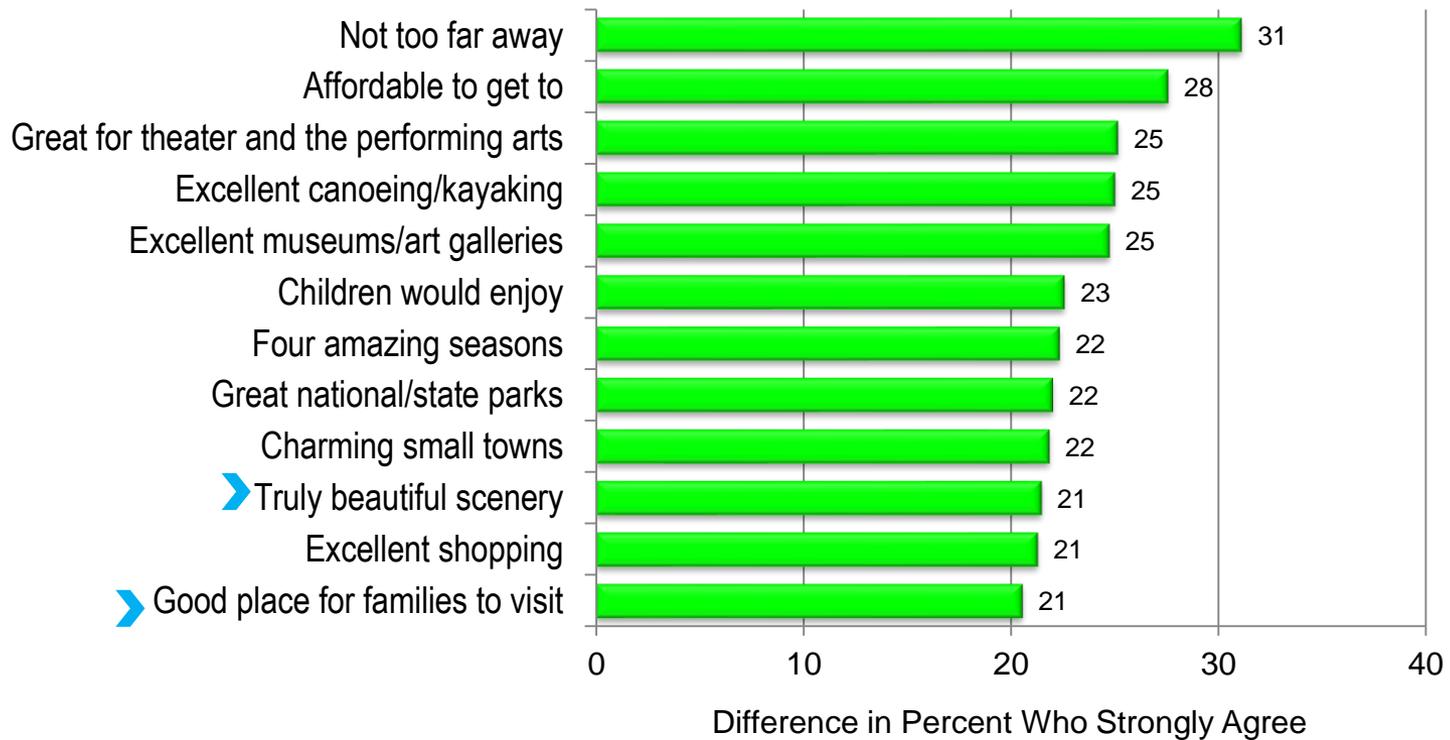


* Visited in past two years

■ Recent Visitors* ■ Never Visited

Top Product Strengths vs. Image

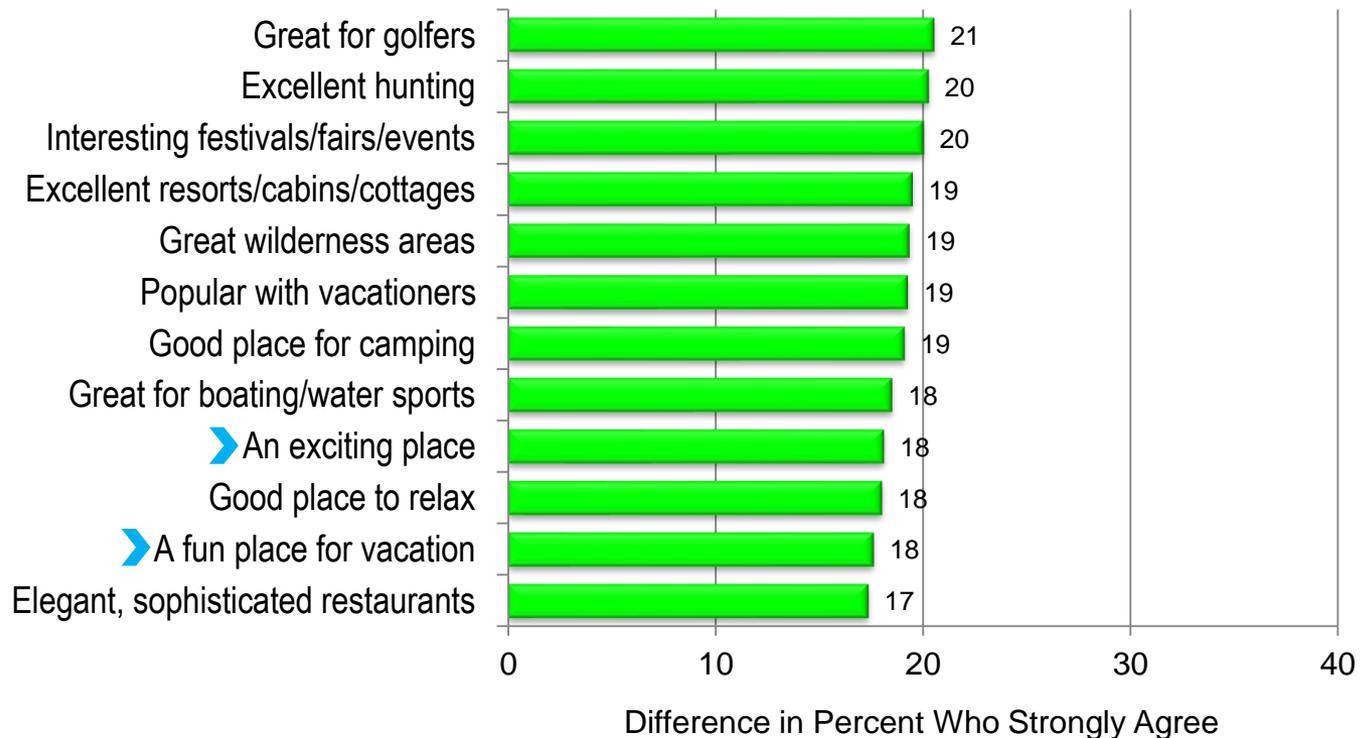
Base: Residents of Minnesota's Regional Advertising Markets



* 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



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

Top Product Strengths vs. Image (Cont'd)

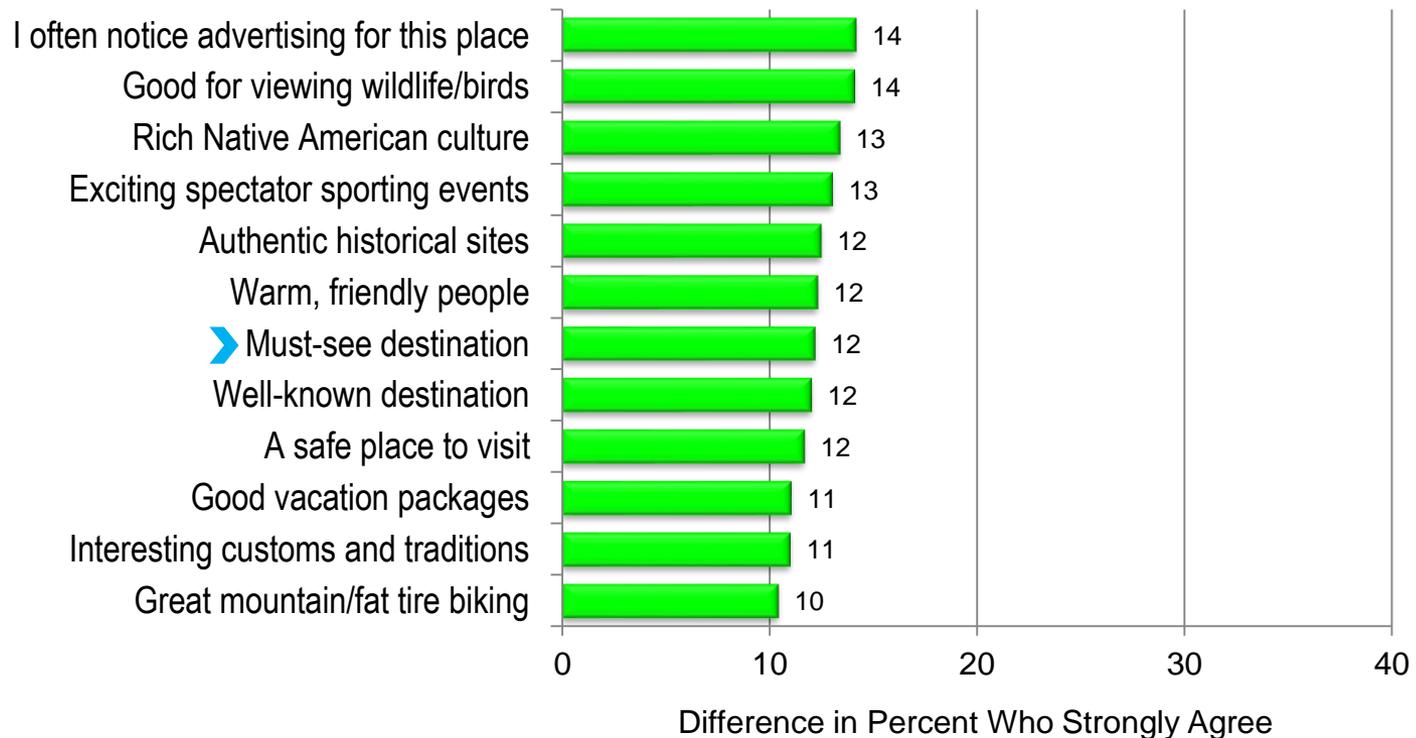
Base: Residents of Minnesota's Regional Advertising Markets



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

Top Product Strengths vs. Image (Cont'd)

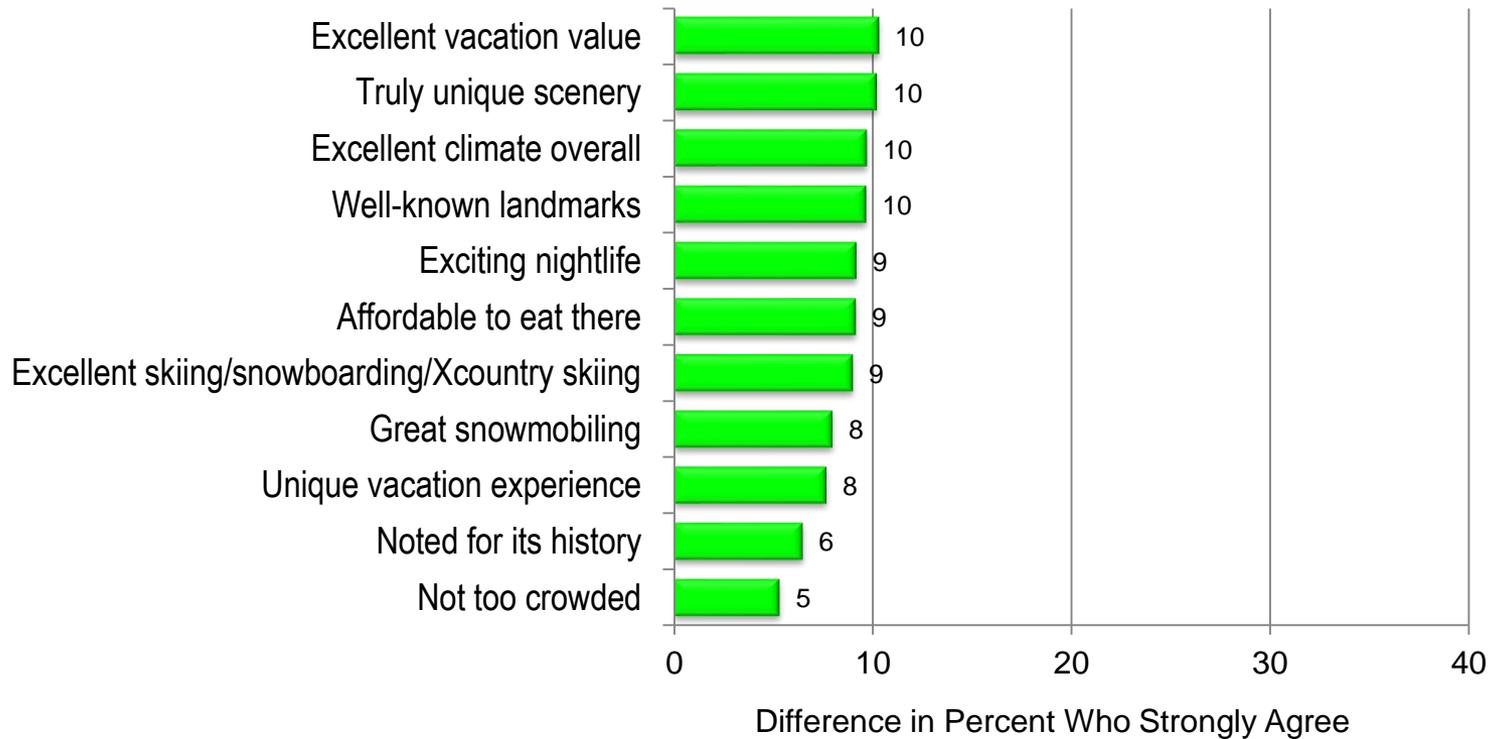
Base: Residents of Minnesota's Regional Advertising Markets



* 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



Top Product Weaknesses vs. Image

Base: Residents of Minnesota's Regional Advertising Markets

**THERE WERE NO SIGNIFICANT
PERCEIVED PRODUCT
WEAKNESSES VS. IMAGE**



Impact of Advertising on Image



The Campaign

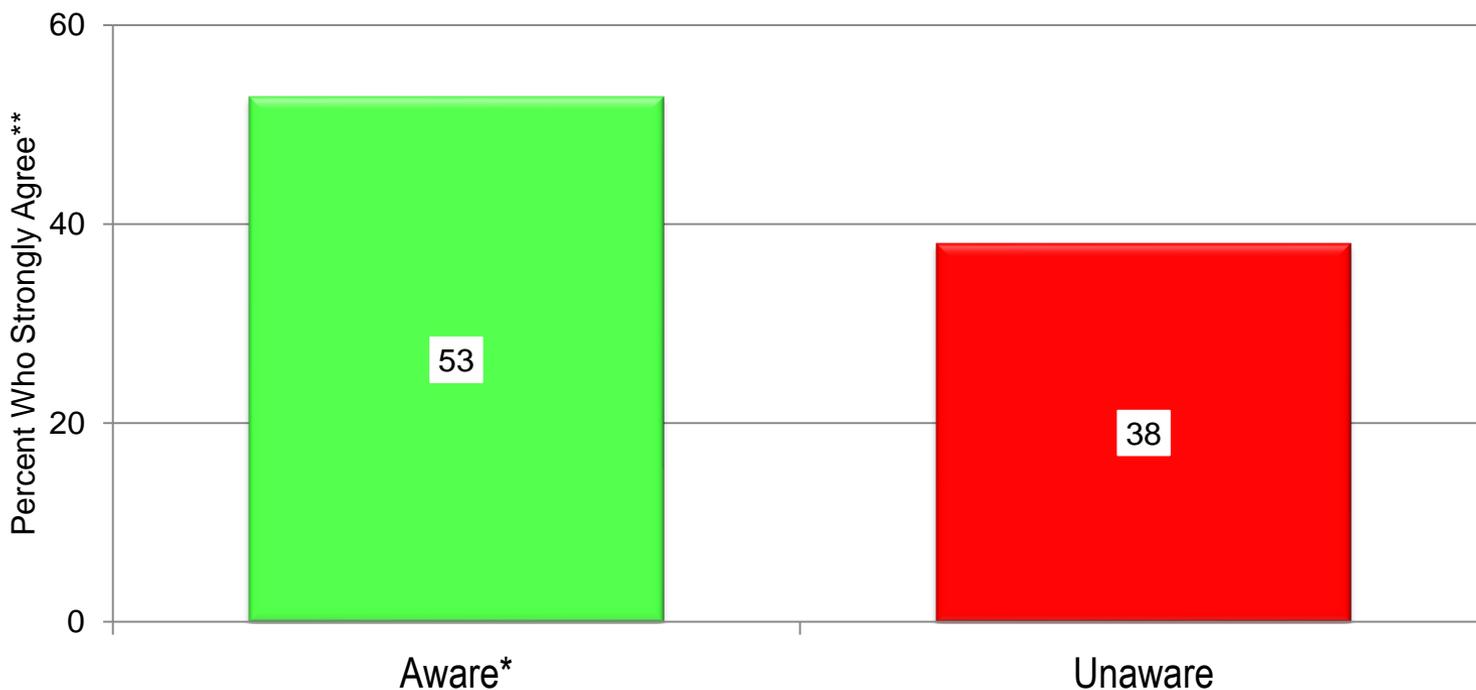
Advertising Impact on Image

- 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.

Advertising Impact on Image (Cont'd)

- 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"



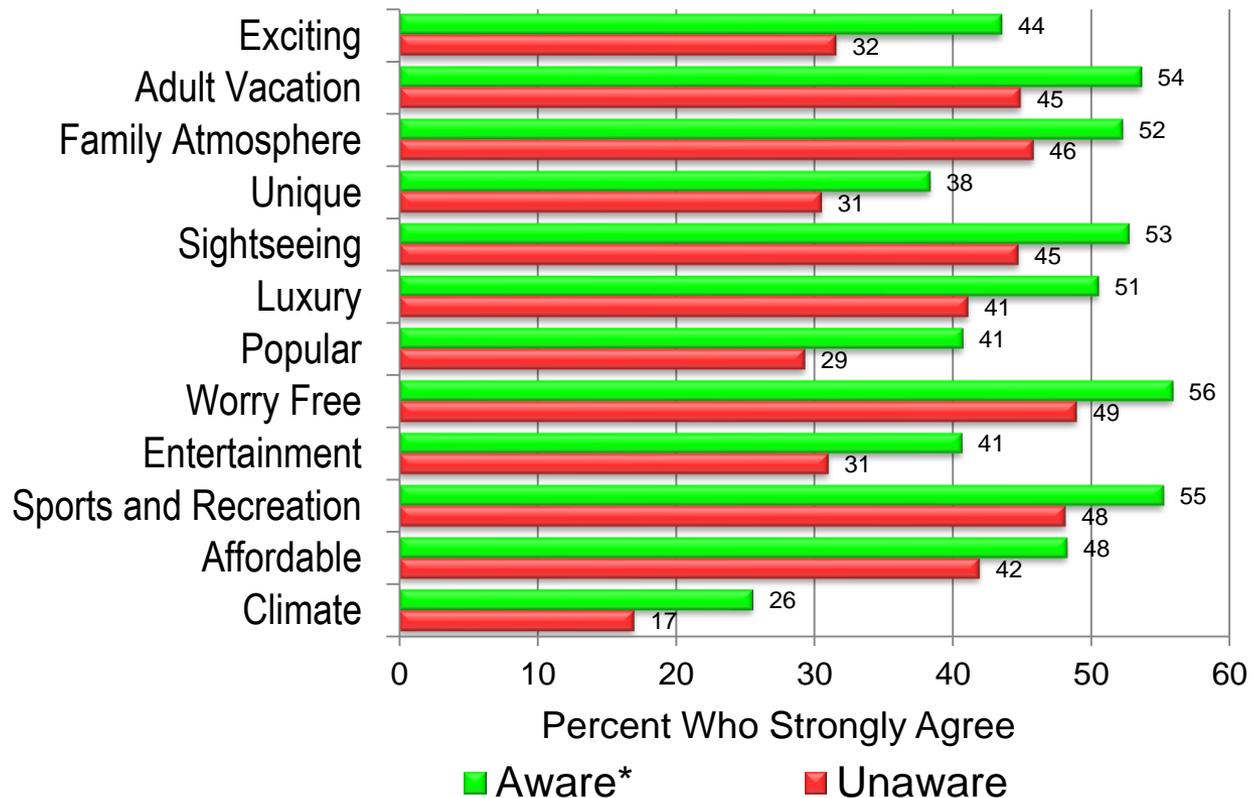
*Saw at least one ad.

**"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

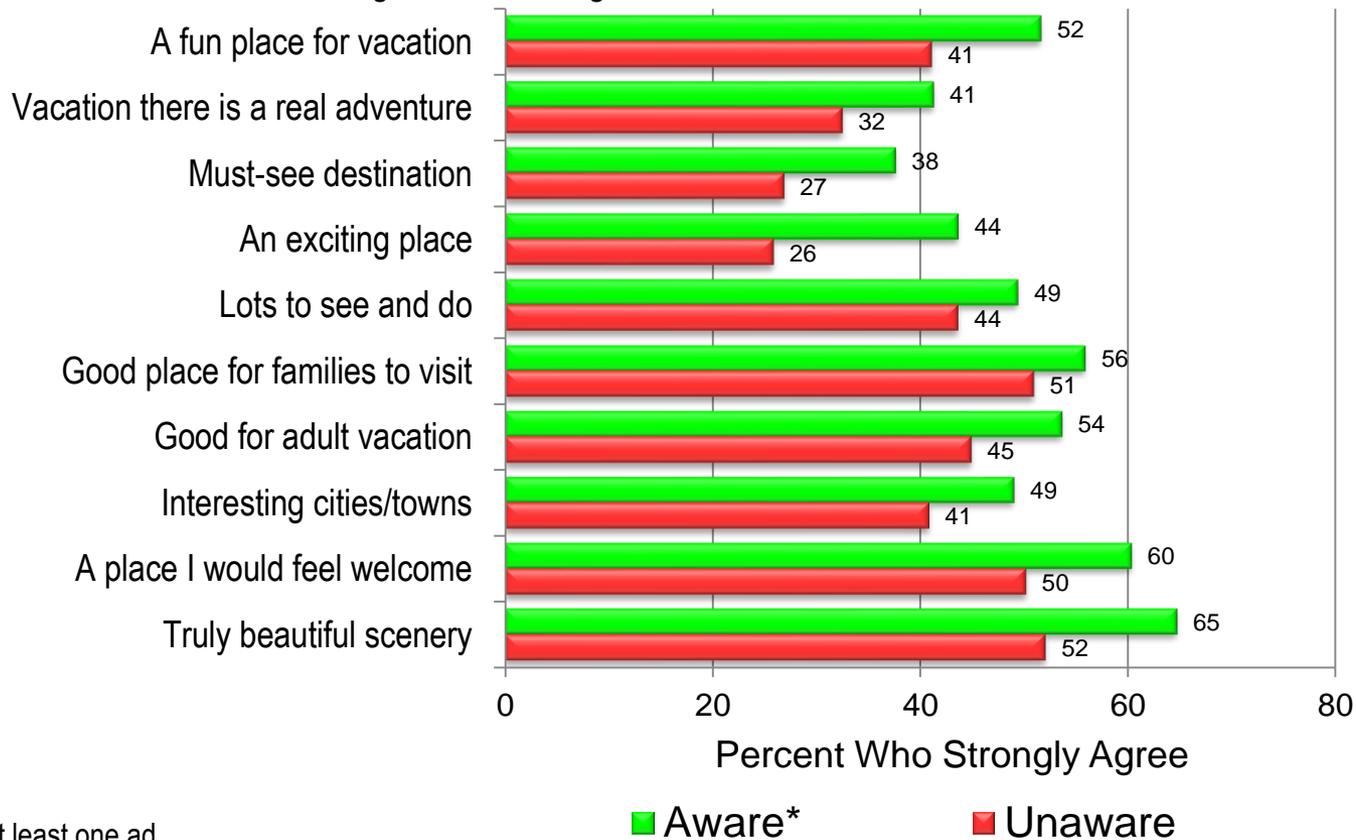
Base: Residents of Minnesota's Regional Advertising Markets



*Saw at least one ad

Impact of Advertising on Minnesota's Hot Buttons

Base: Residents of Minnesota's Regional Advertising Markets



*Saw at least one ad

Image Attributes Most Impacted by Advertising

Base: Residents of Minnesota's Regional Advertising Markets

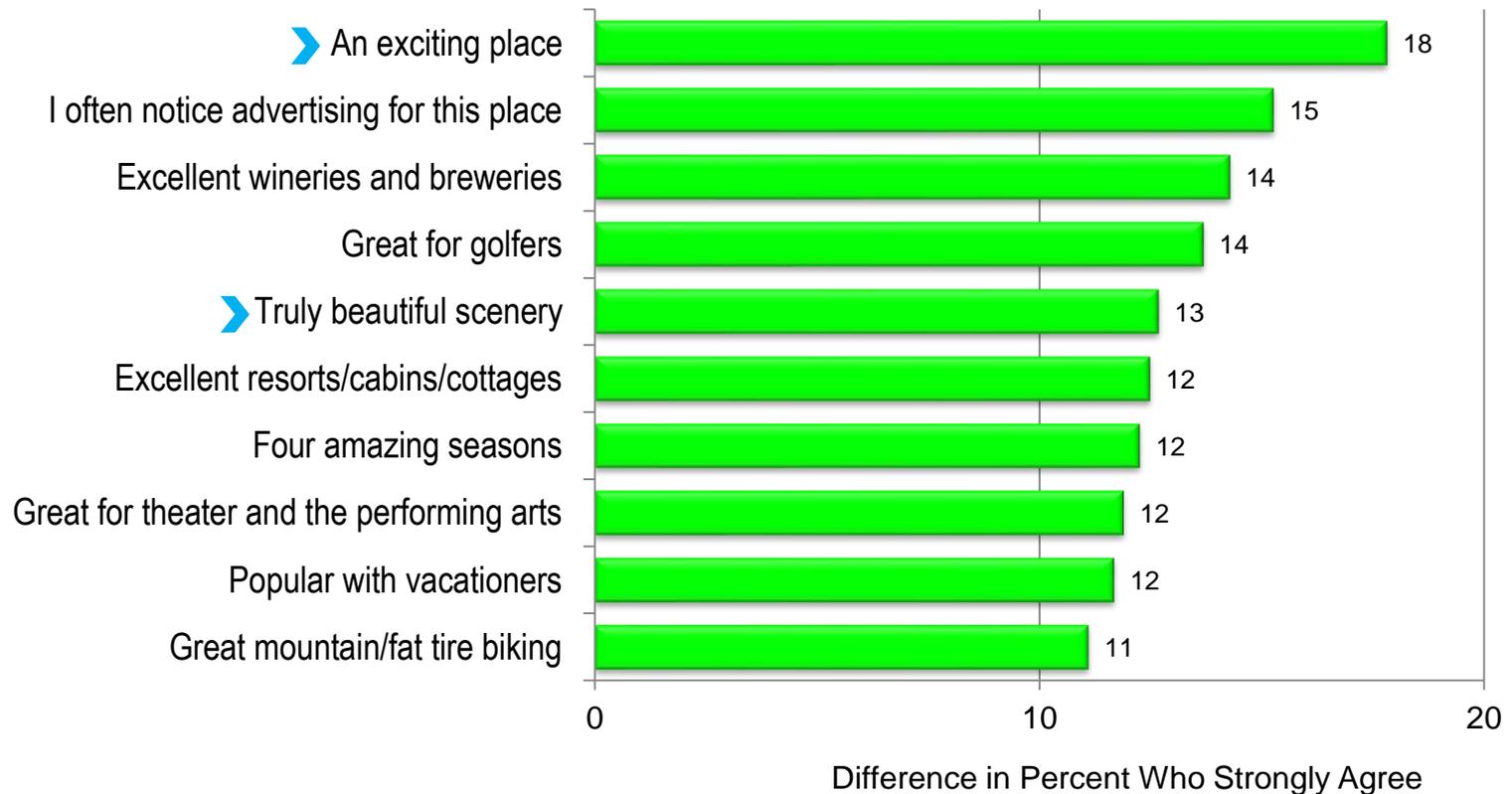


Image Attributes Most Impacted by Advertising (Cont'd)

Base: Residents of Minnesota's Regional Advertising Markets

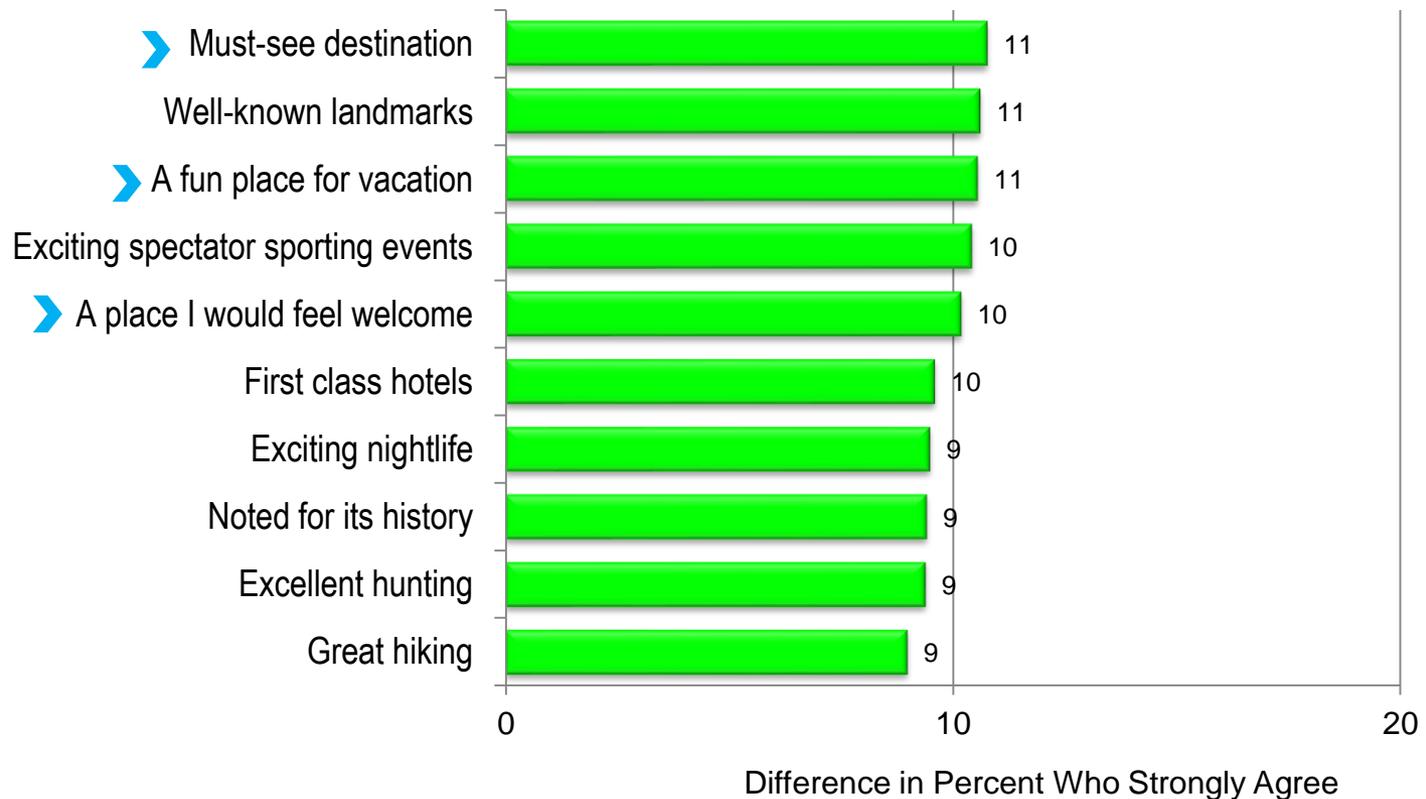
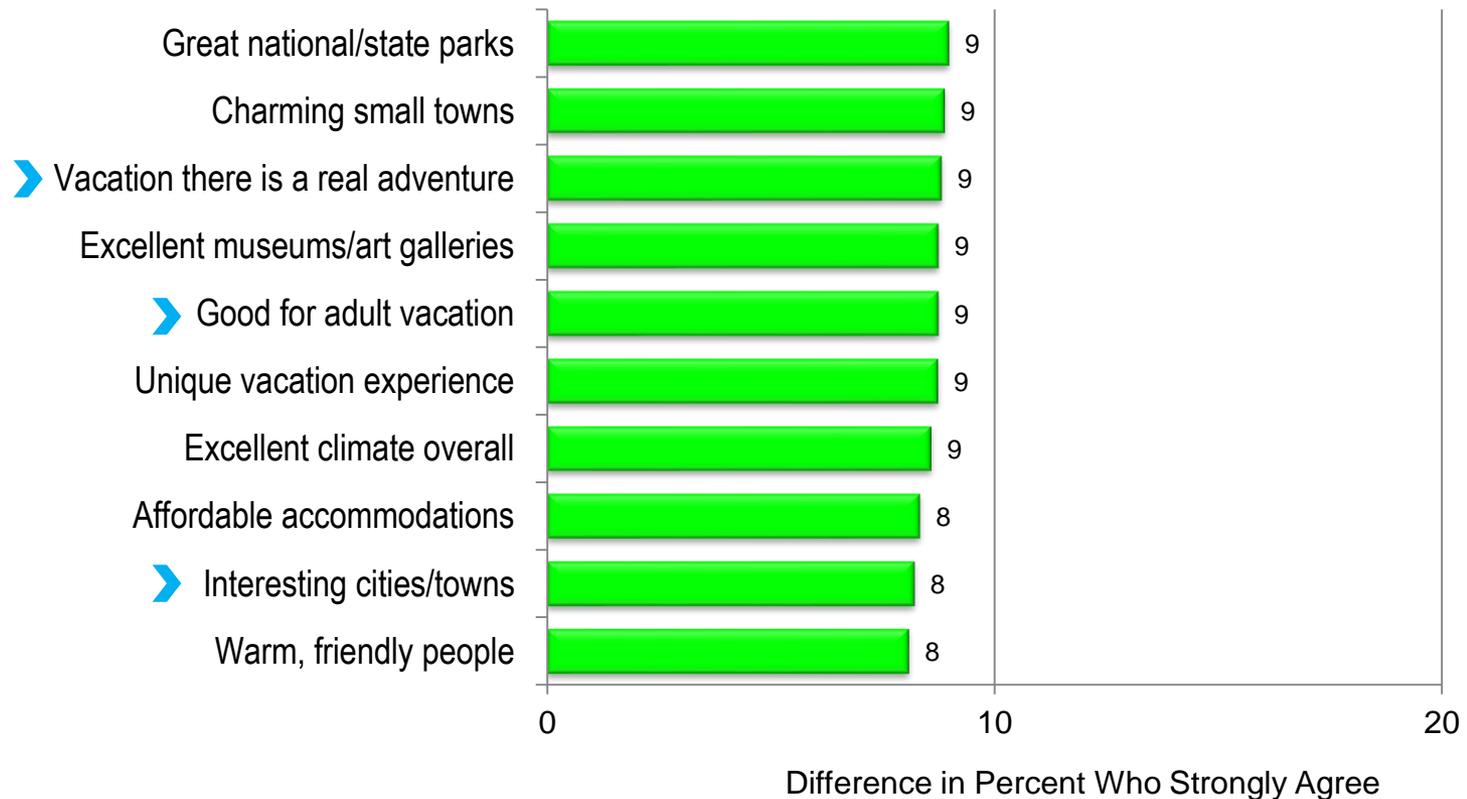


Image Attributes Most Impacted by Advertising (Cont'd)

Base: Residents of Minnesota's Regional Advertising Markets





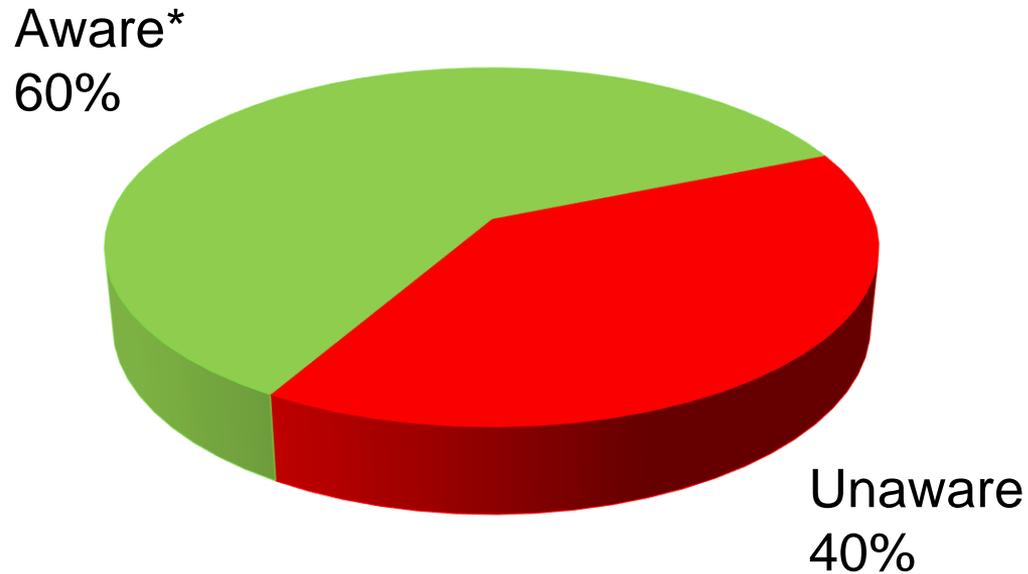
Advertising Awareness

Advertising Impacts

- 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

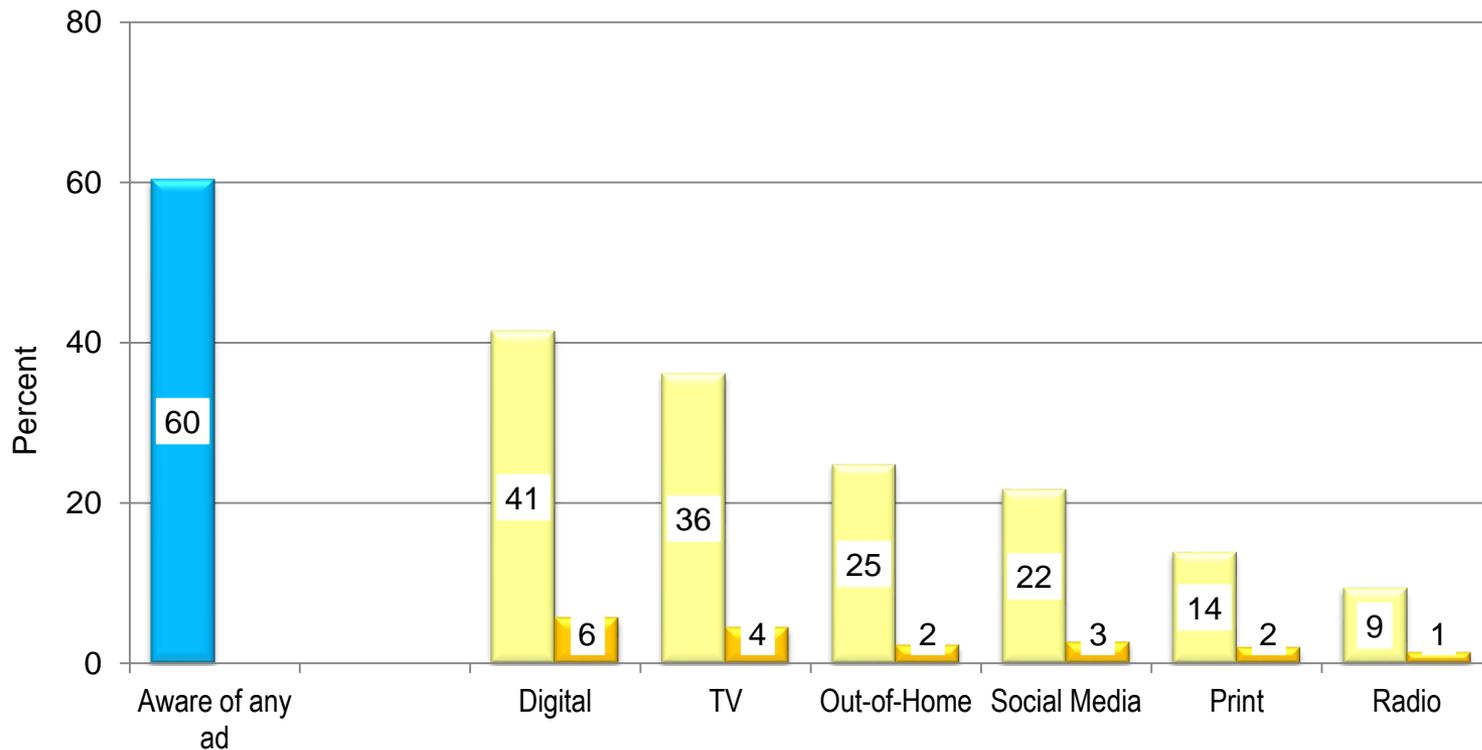
Base: Residents of Minnesota's Regional Advertising Markets



*Saw at least one ad

Advertising Awareness* by Medium

Base: Residents of Minnesota's Regional Advertising Markets

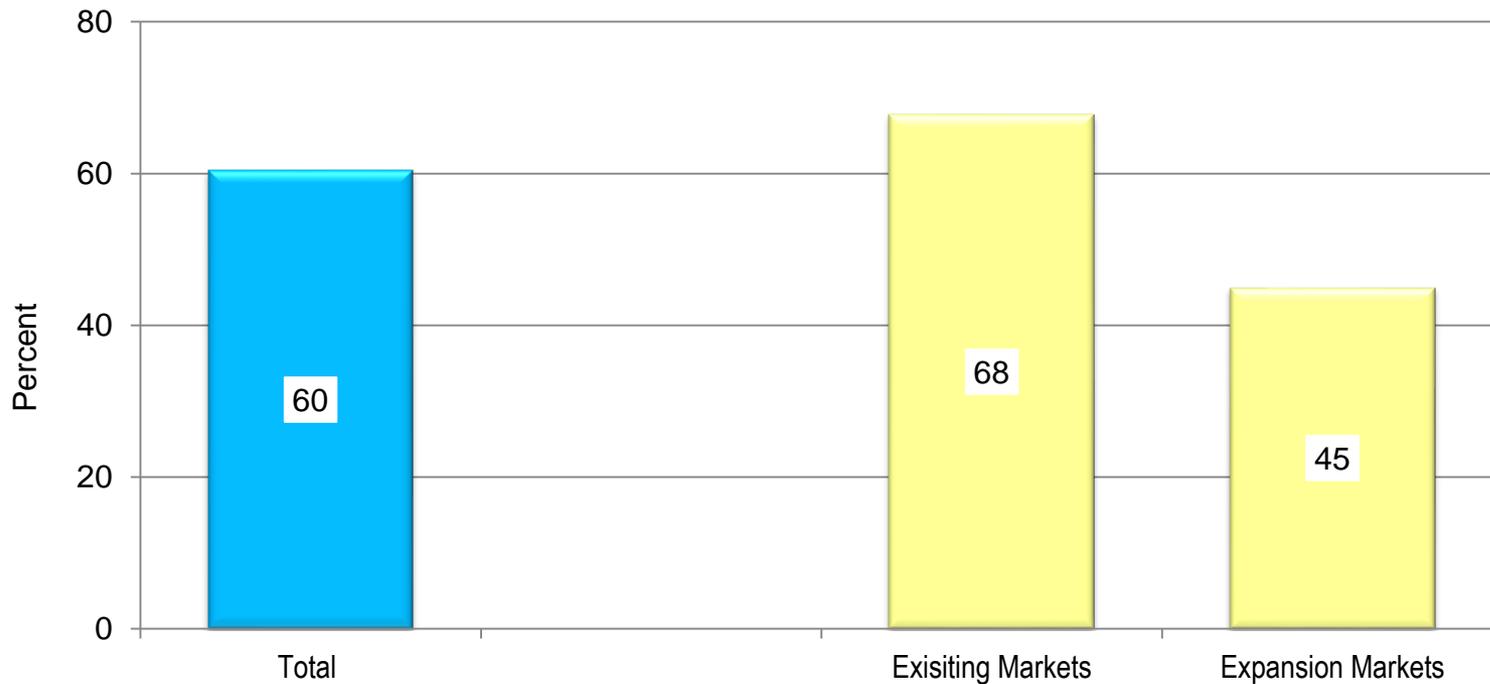


*Saw at least one ad

■ Other Media ■ Only

Awareness* by Market

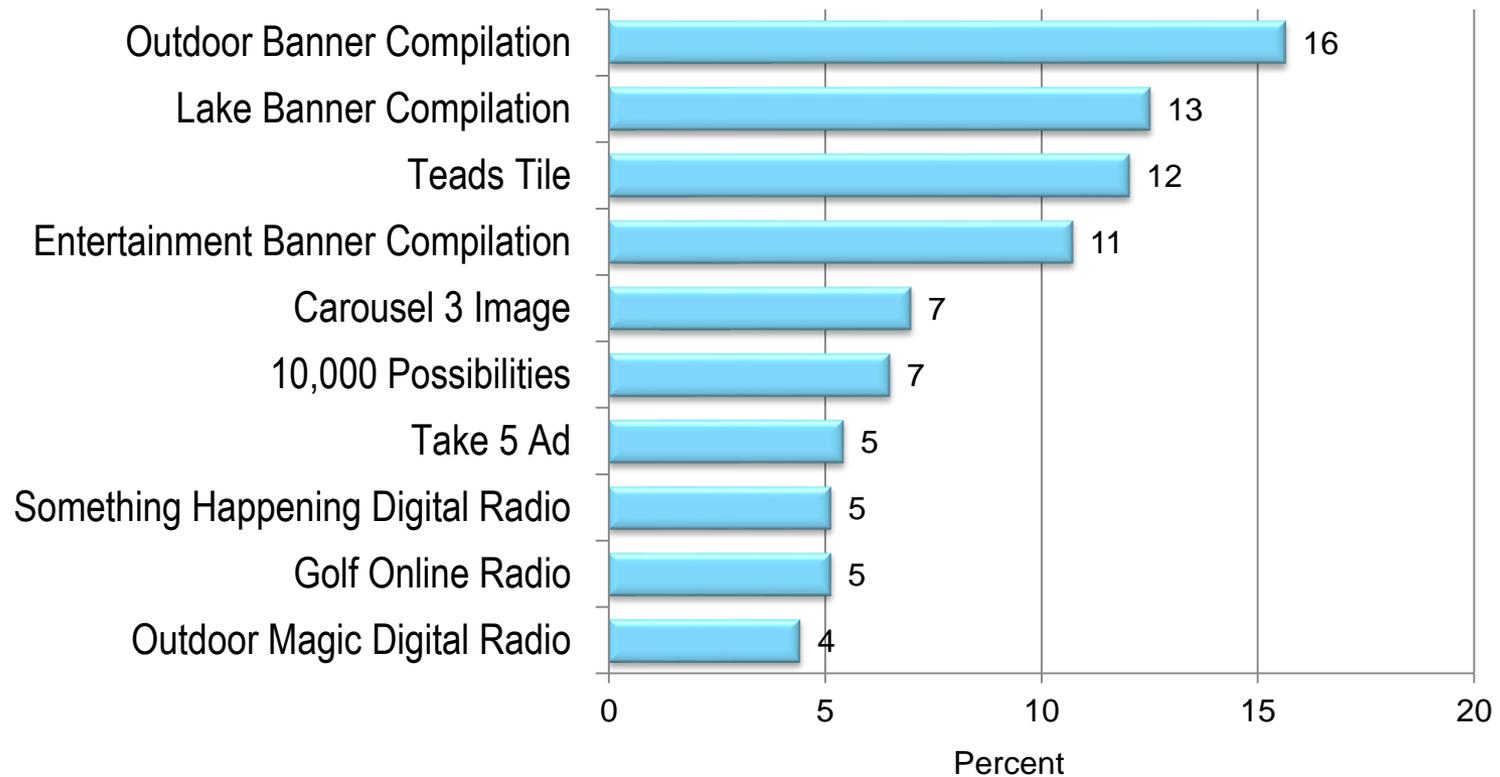
Base: Residents of Minnesota's Regional Advertising Markets



*Saw at least one ad

Awareness of Individual Ads*

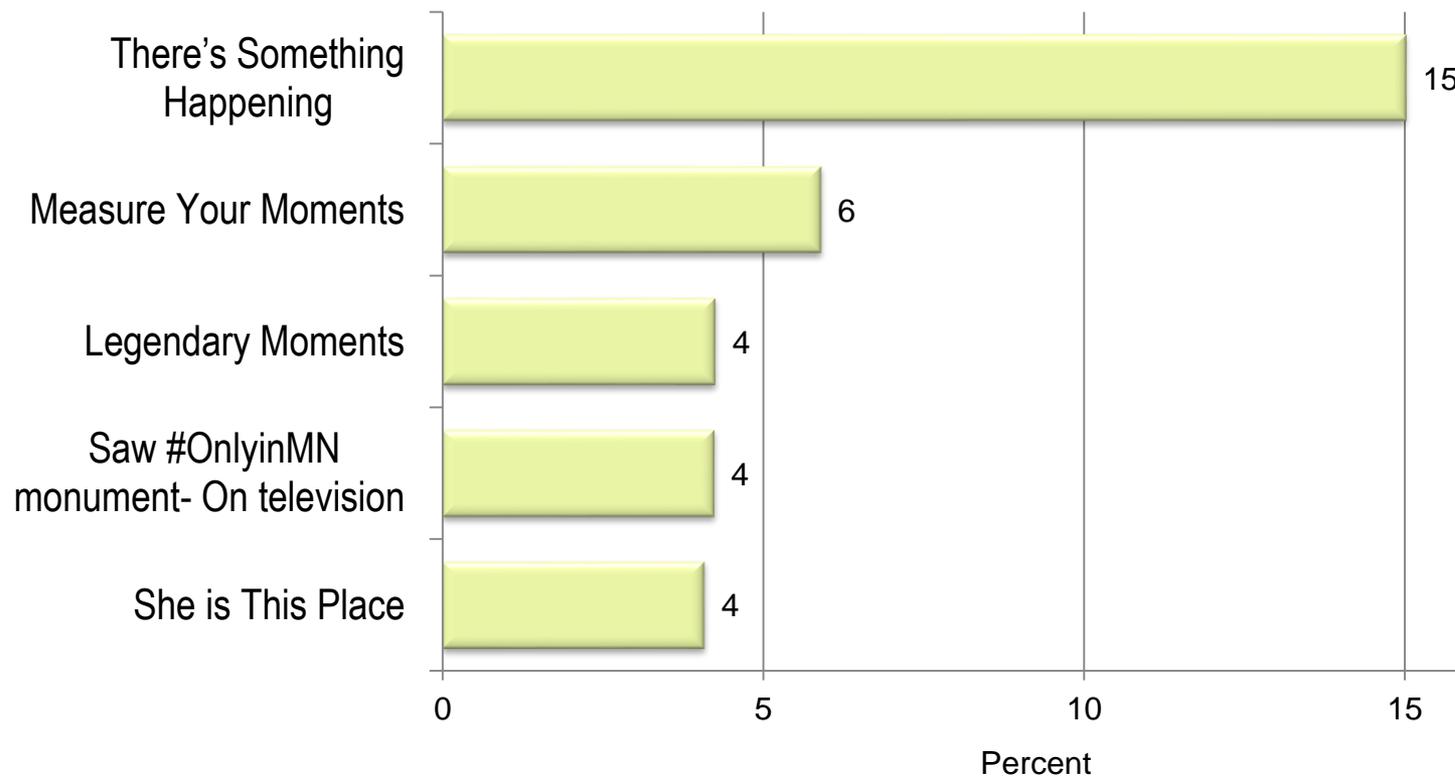
— Digital



*Based on markets where shown

Awareness of Individual Ads*

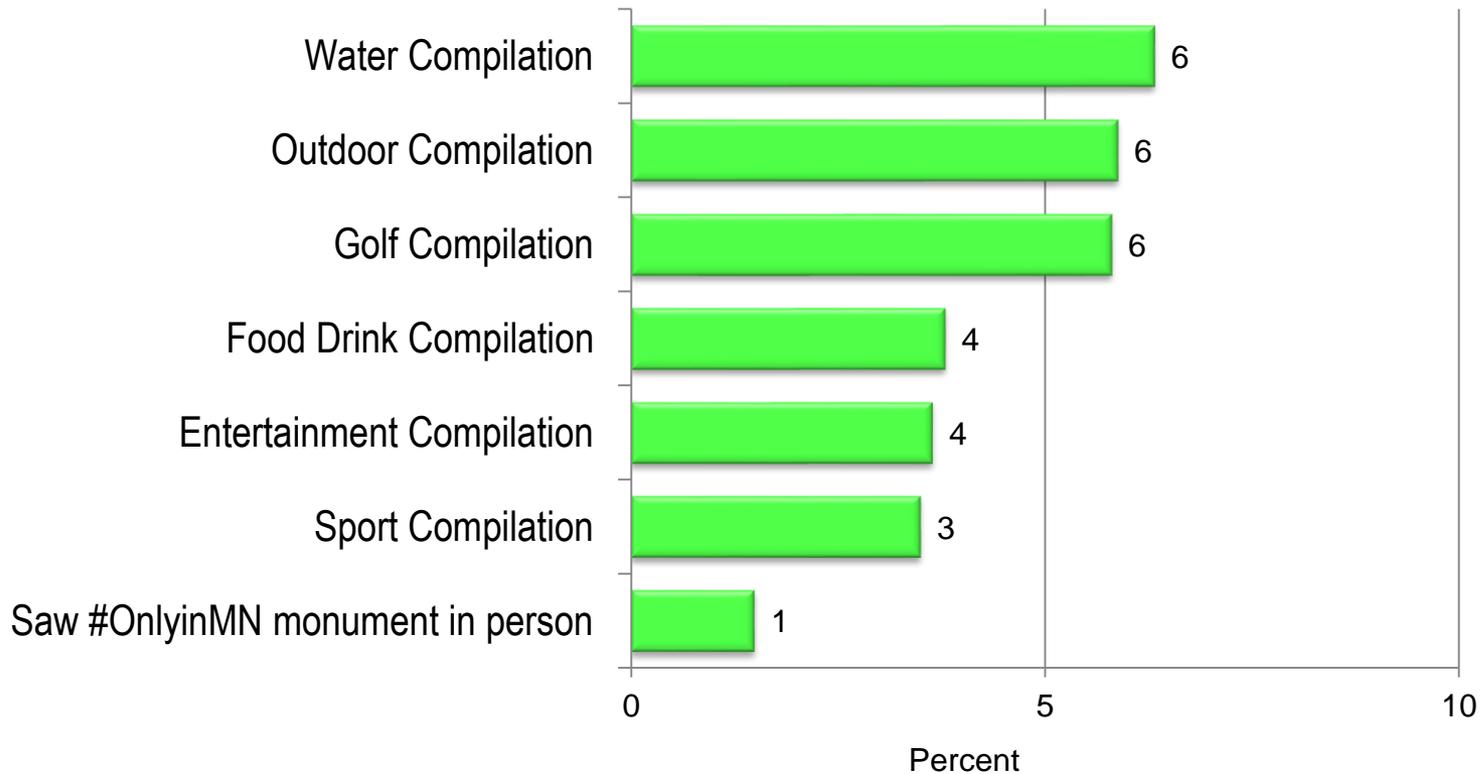
— TV



*Based on markets where shown

Awareness of Individual Ads*

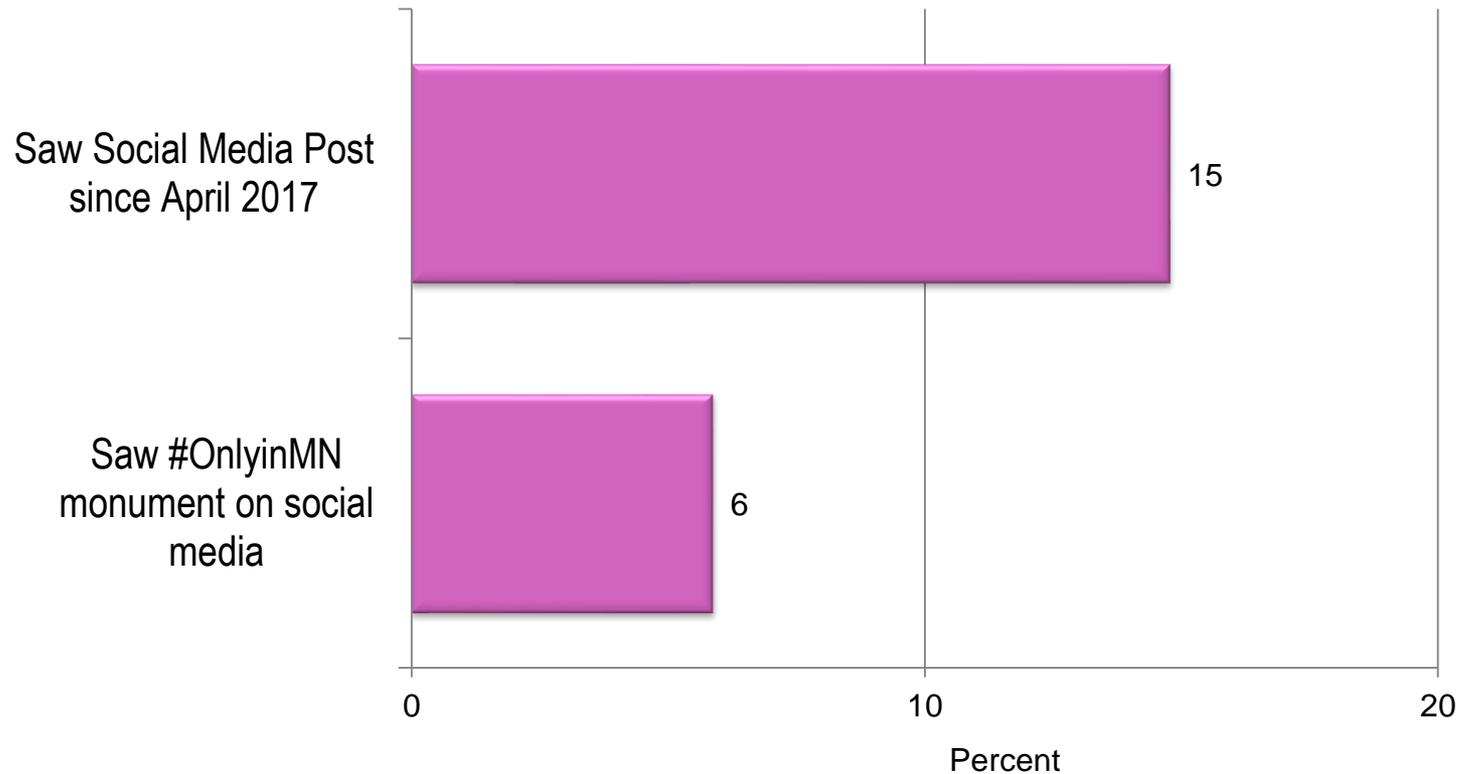
— Out-of-Home



*Based on markets where shown

Awareness of Individual Ads*

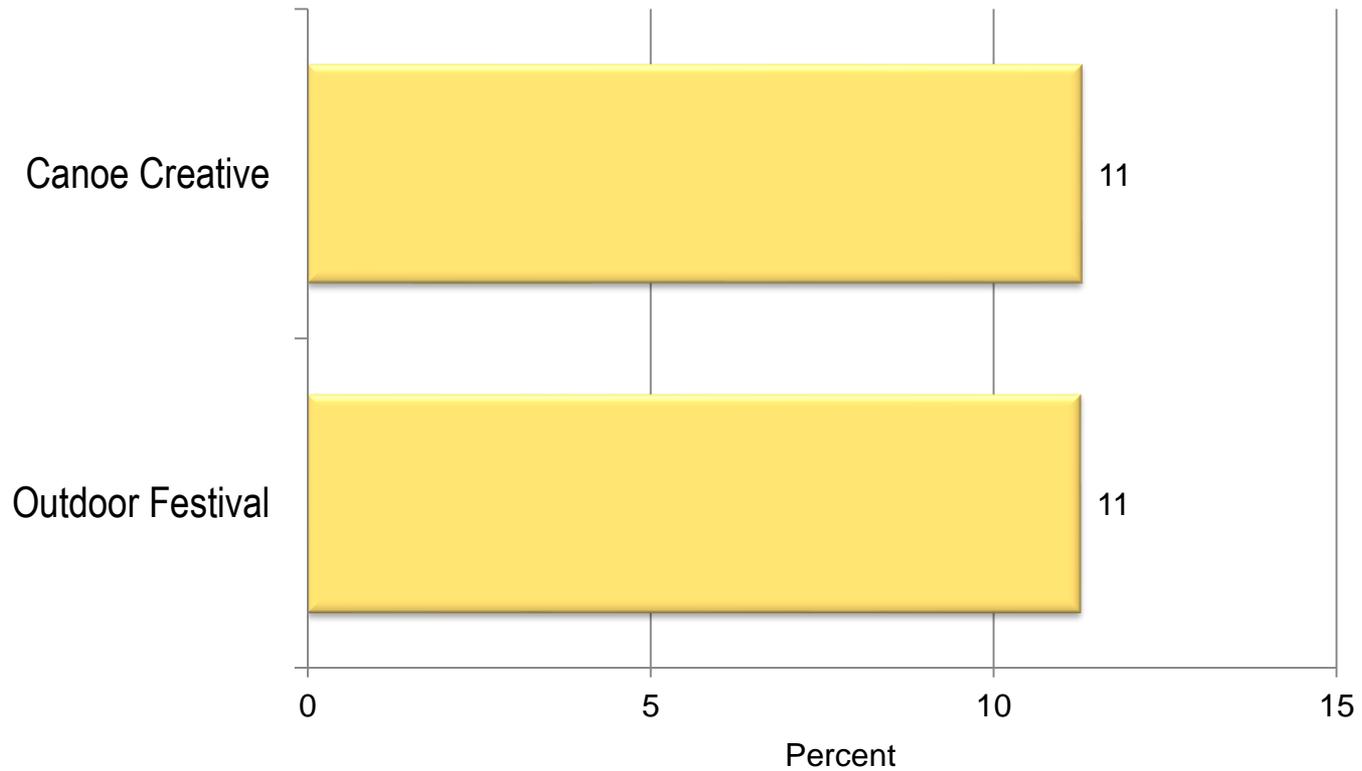
— Social Media



*Based on markets where shown

Awareness of Individual Ads*

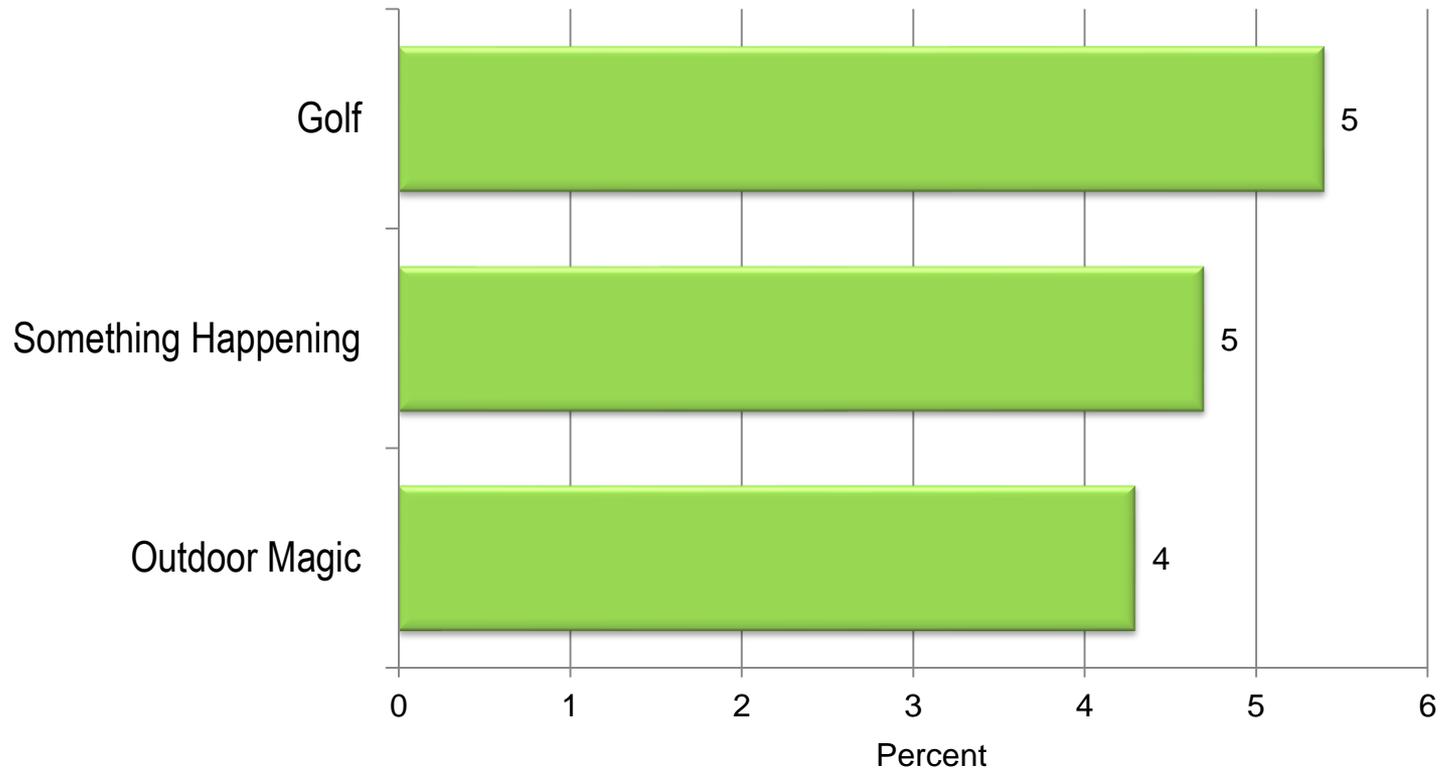
— Print



*Based on markets where shown

Awareness of Individual Ads*

— Radio



*Based on markets where shown

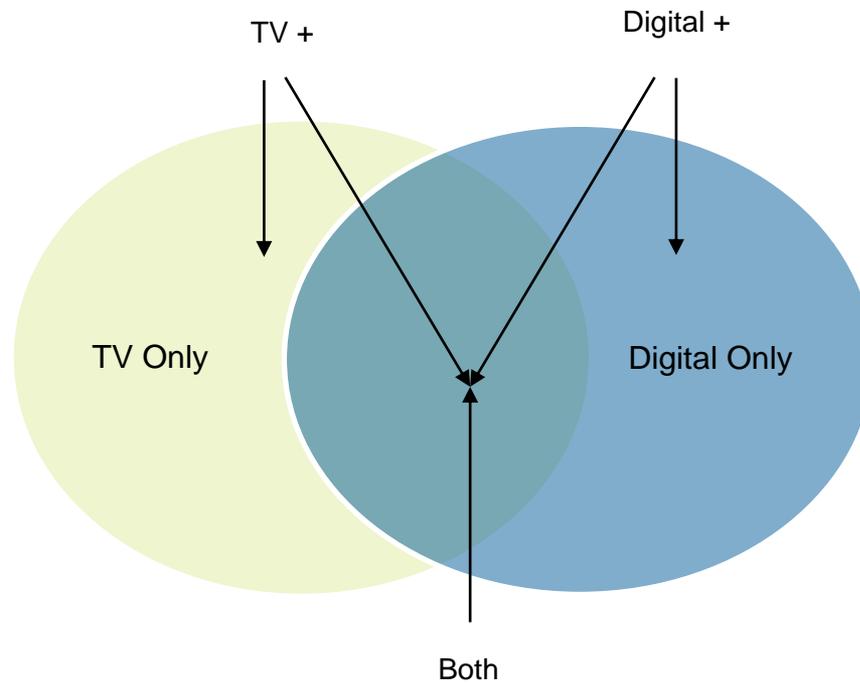
Media Diagnostics



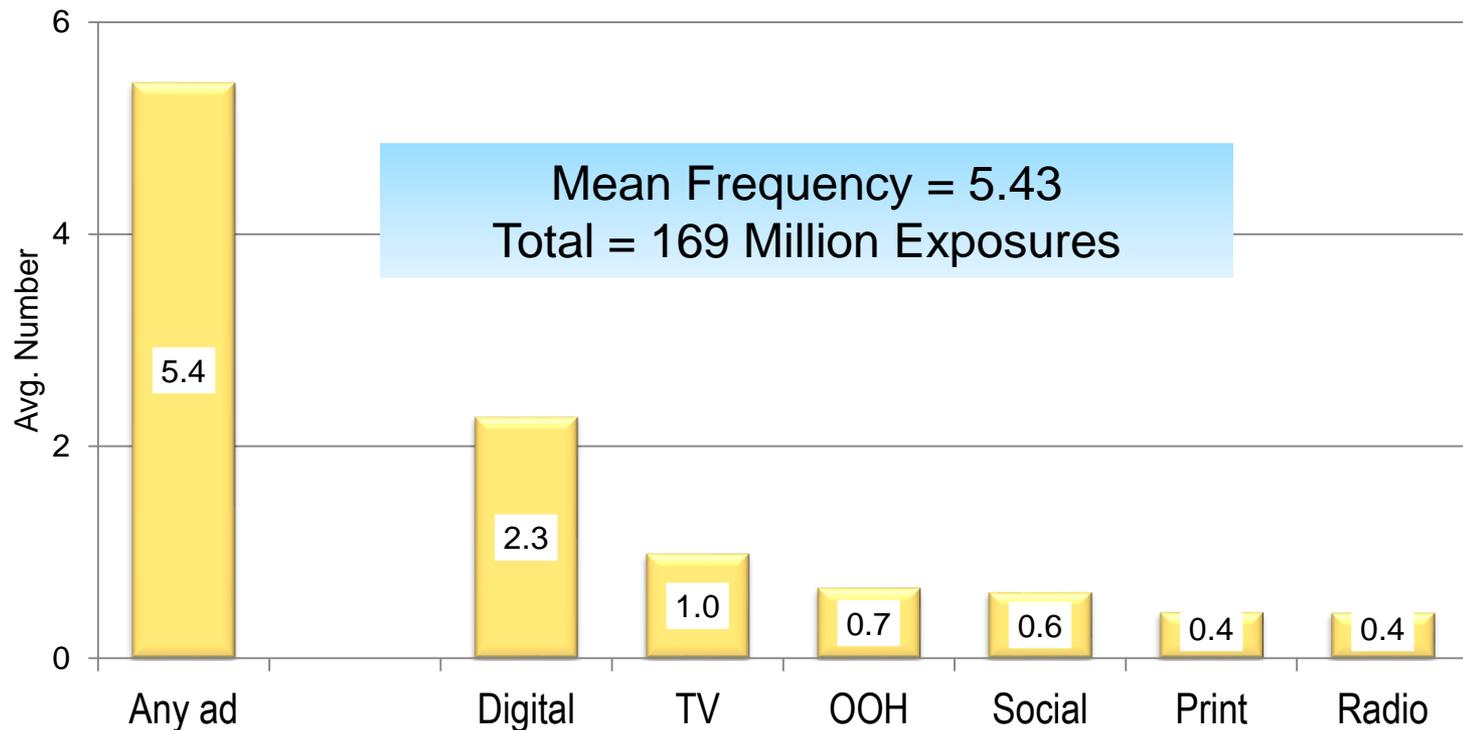
Advertising Awareness

- 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

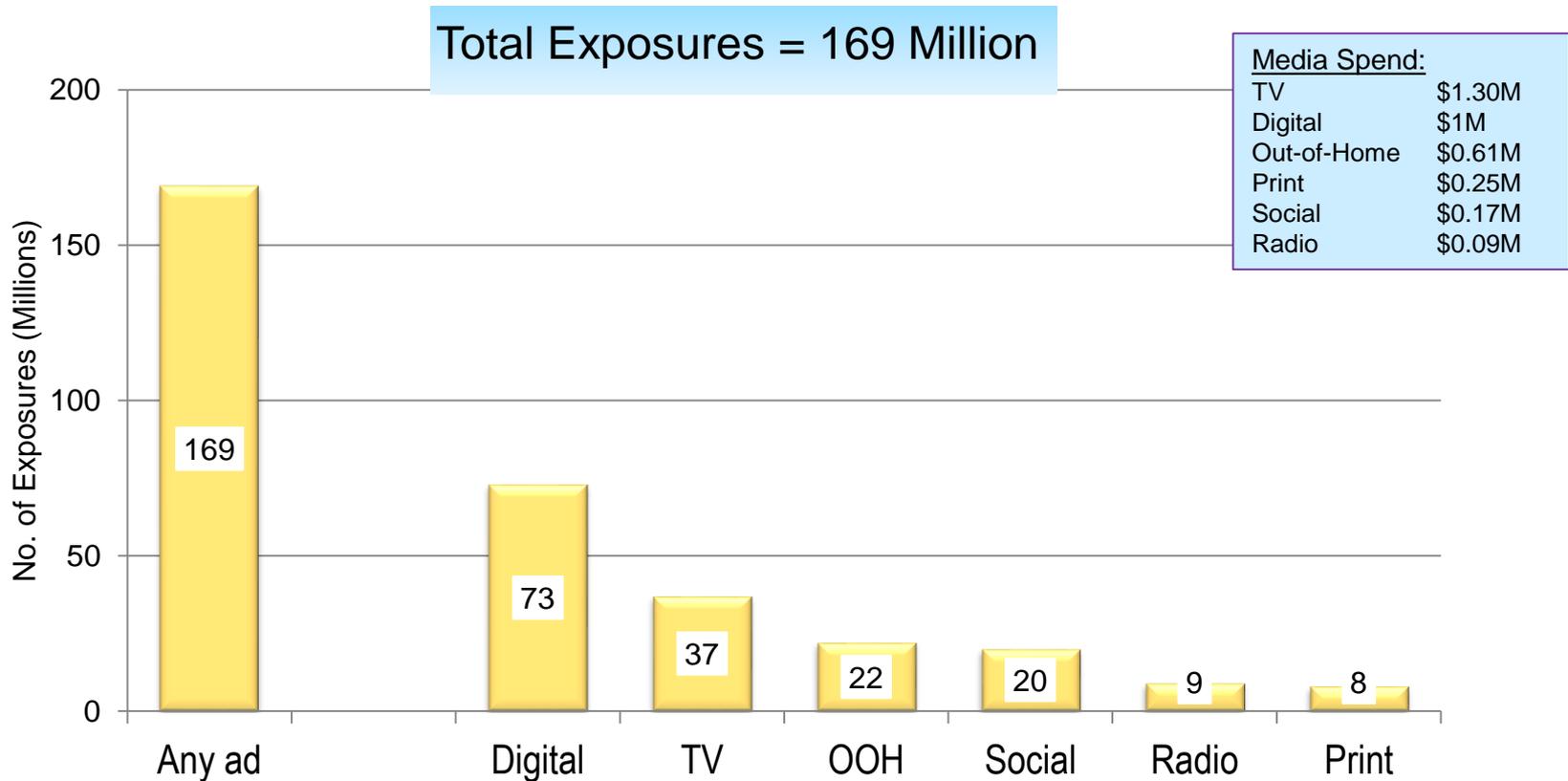


Frequency of Ad Exposures Recalled



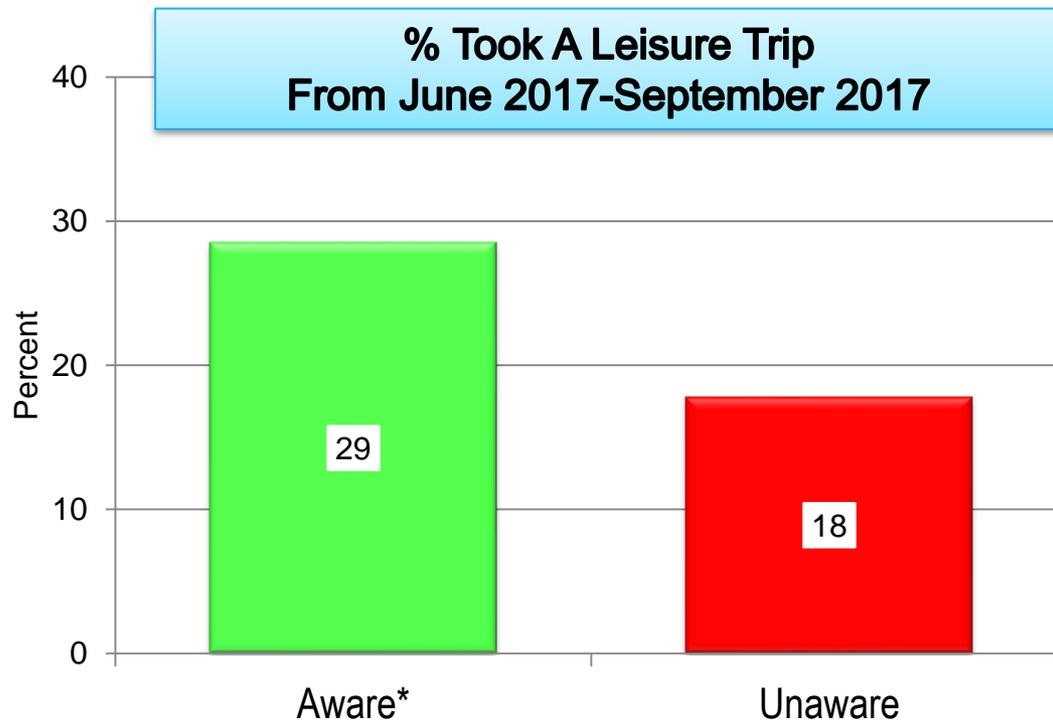
*Saw at least one ad

Total Exposures Recalled by Medium



*Incidence of awareness x population aware x mean frequency recalled

Impact of Advertising on Short-term Trip Taking to Minnesota



*Saw at least one ad



Longwoods
INTERNATIONAL

Halo Effect on Economic Development Image

Background

- ✓ 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.

Findings

- ✓ 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.

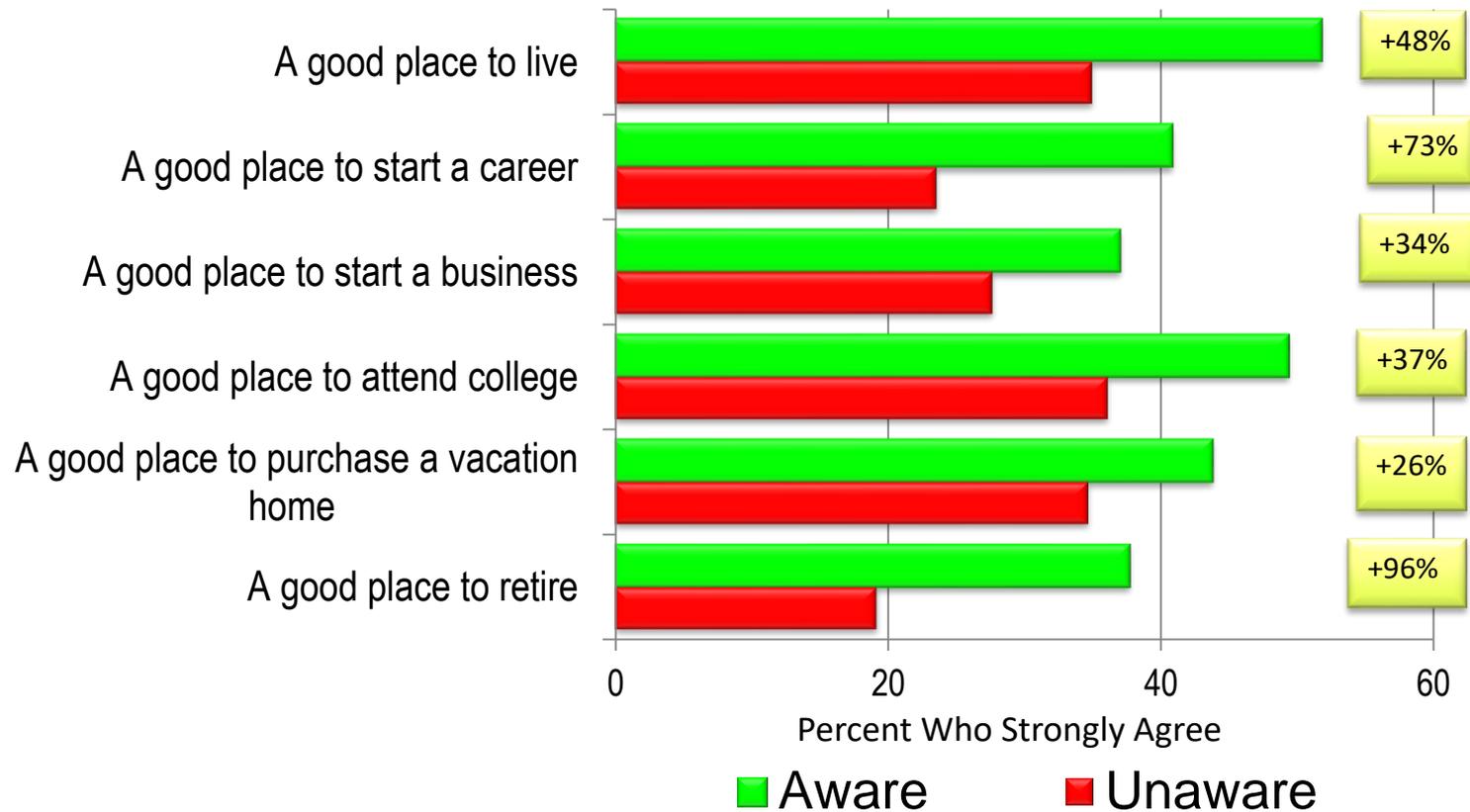
Distribution of Awareness

- ✓ 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.

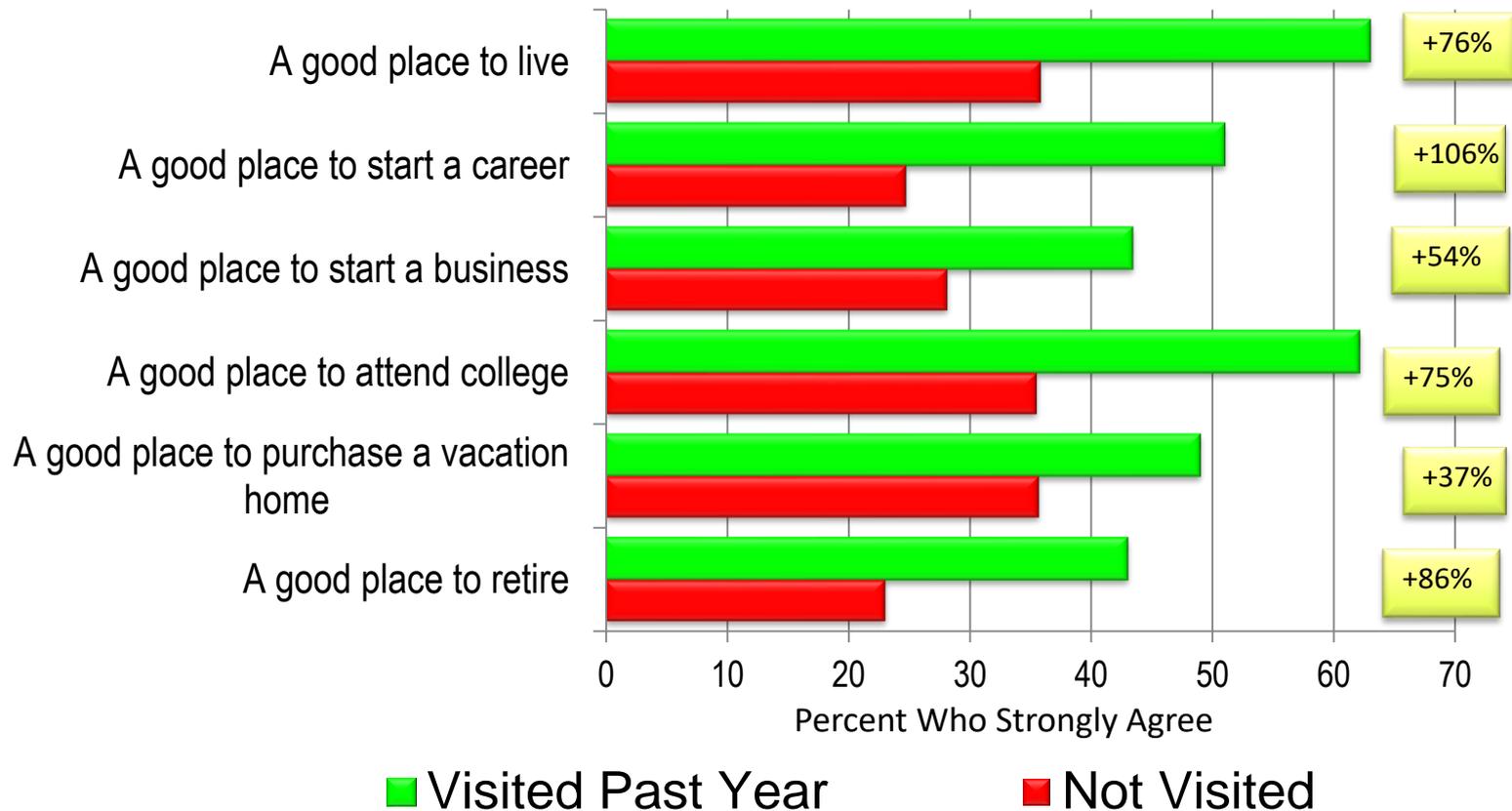
What this means ...

- ✓ 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

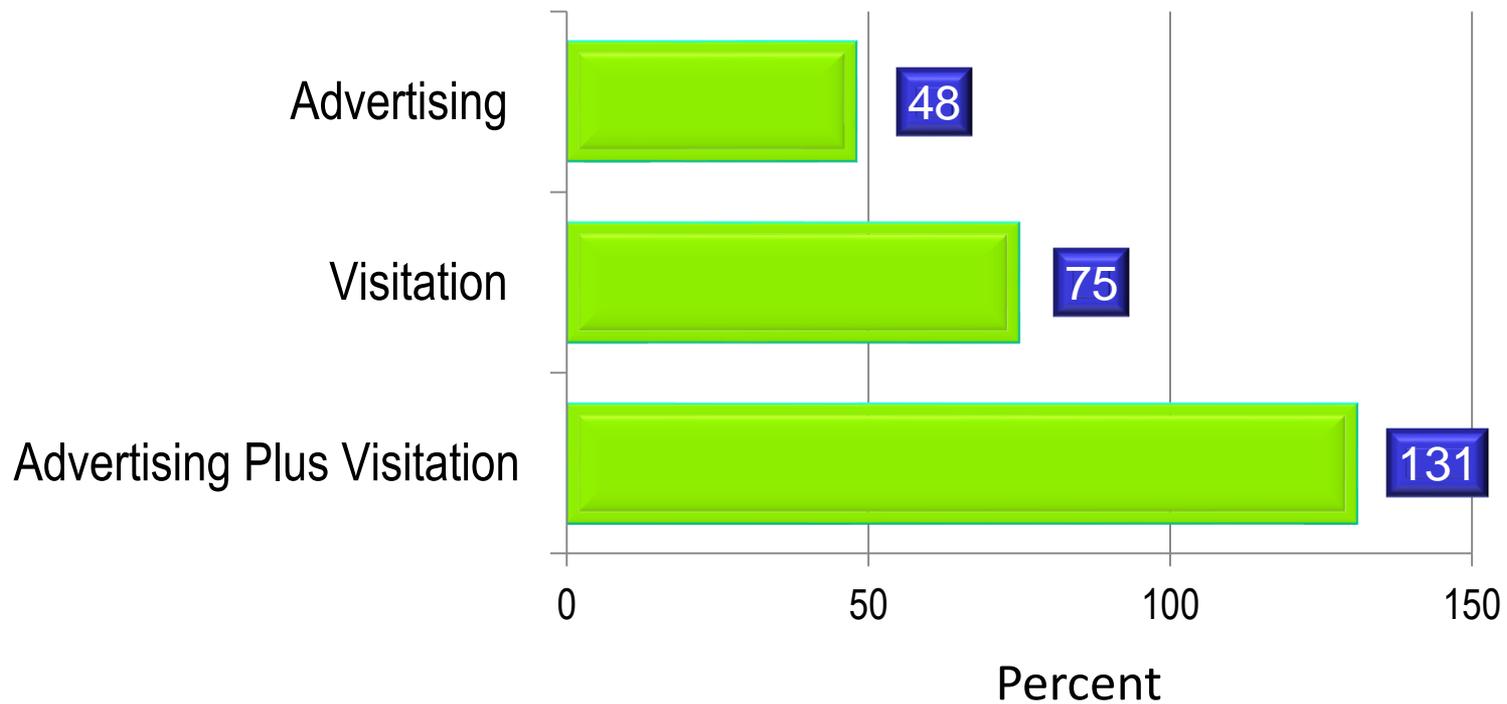


Impact of *Visitation* on Minnesota's Economic Development Image



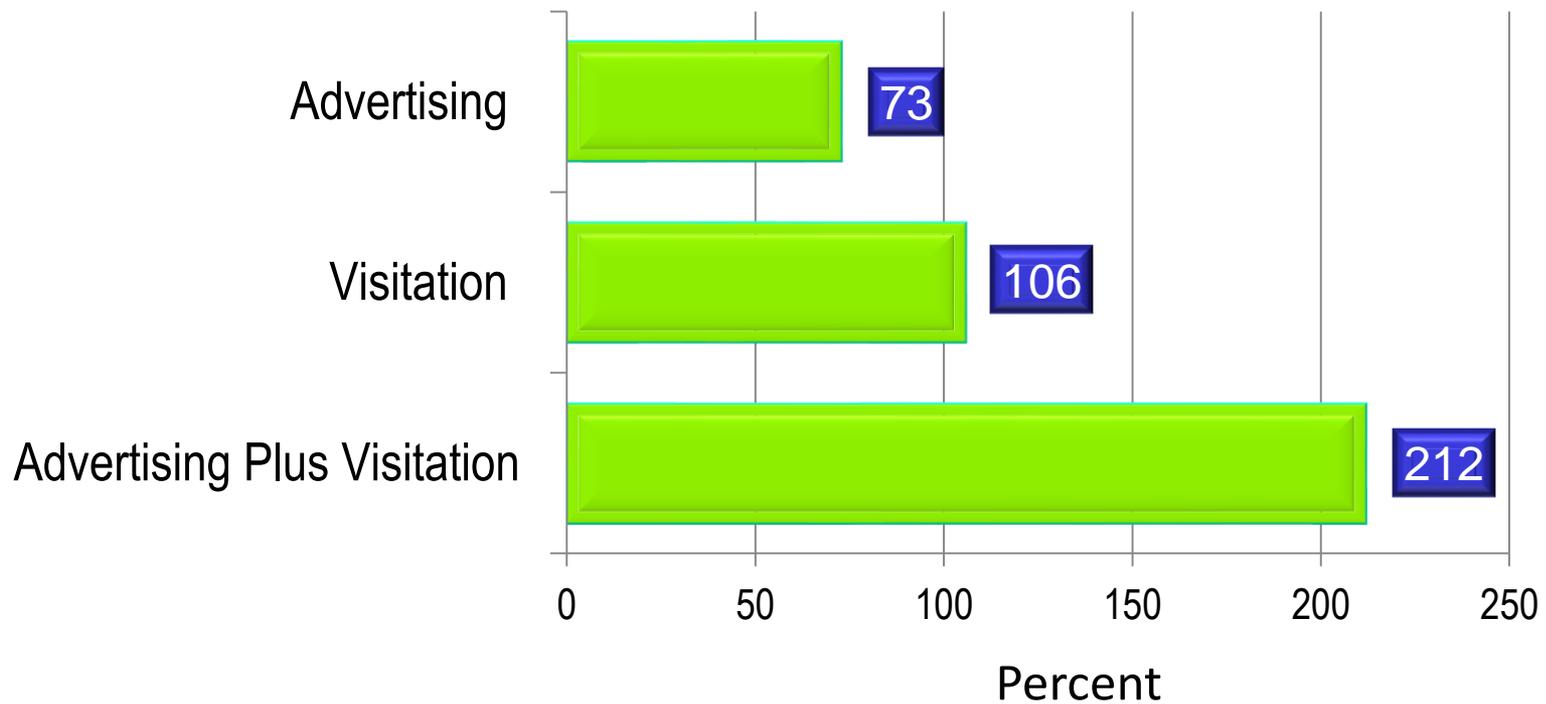
“A Good Place to Live”

% Image Lift for Minnesota



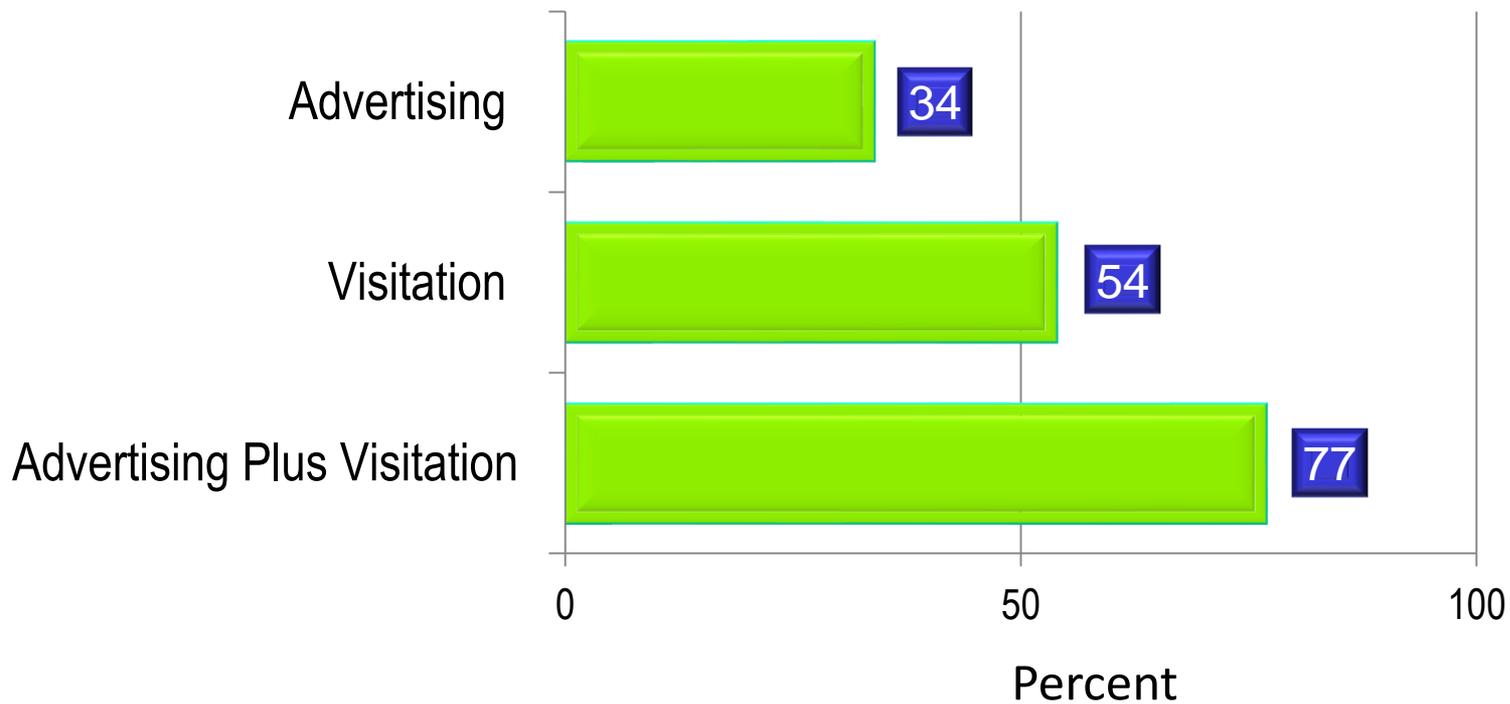
“A Good Place to Start a Career”

% Image Lift for Minnesota



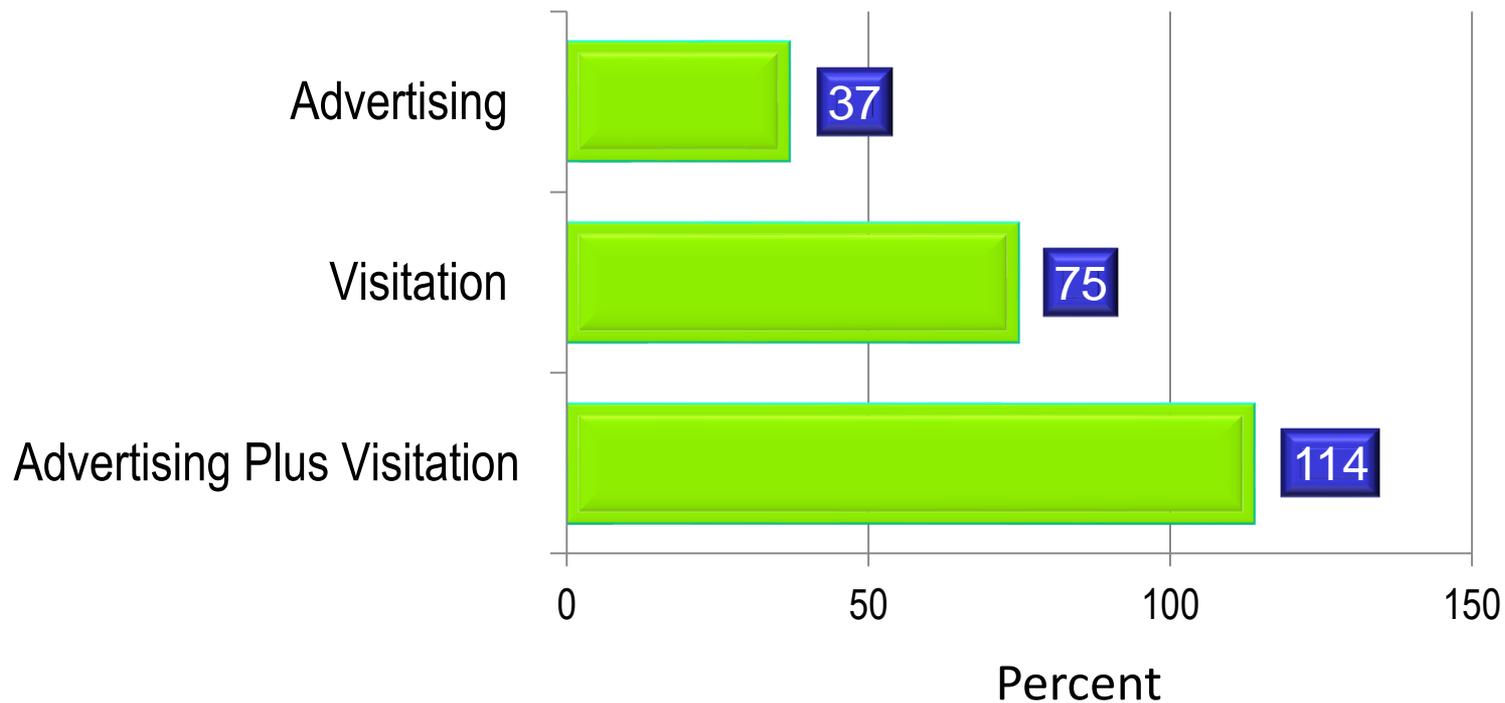
“A Good Place to Start a Business”

% Image Lift for Minnesota



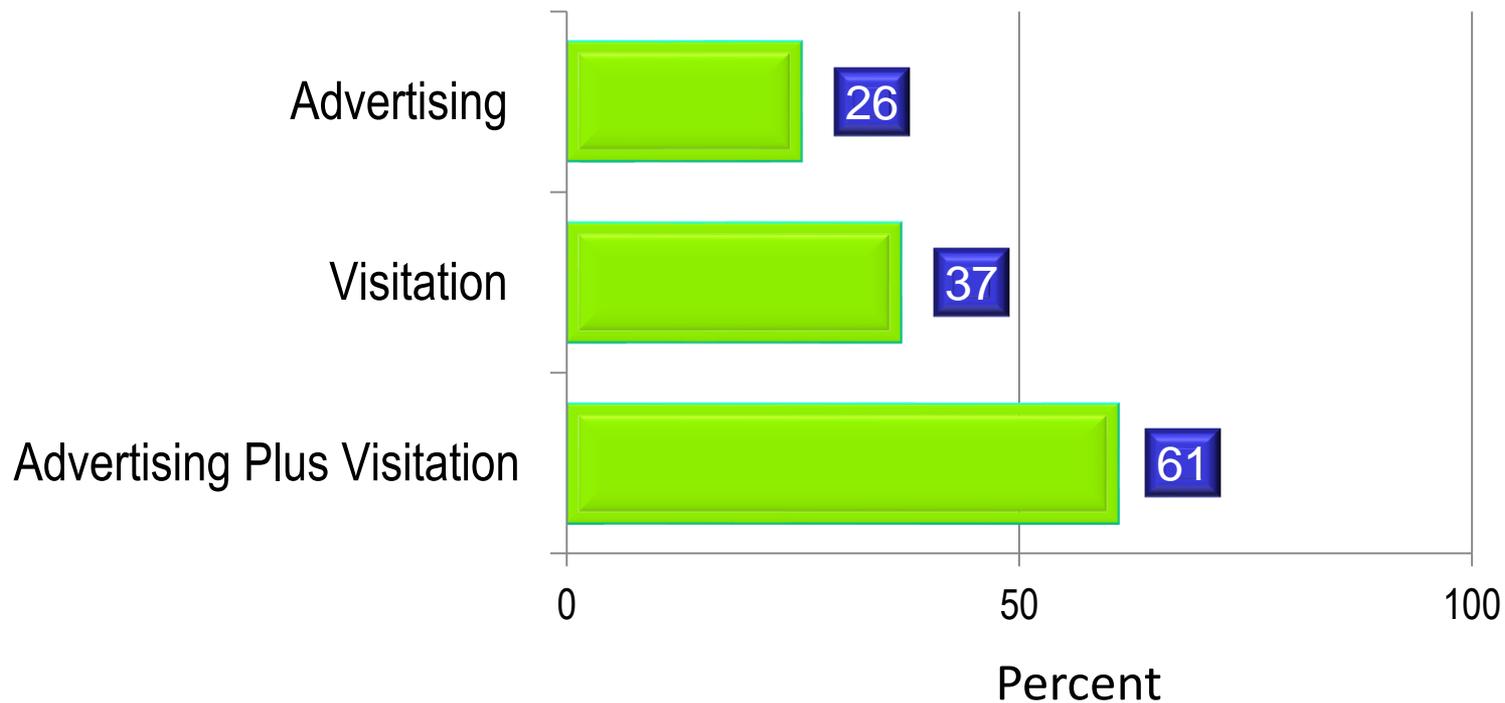
“A Good Place to Attend College”

% Image Lift for Minnesota



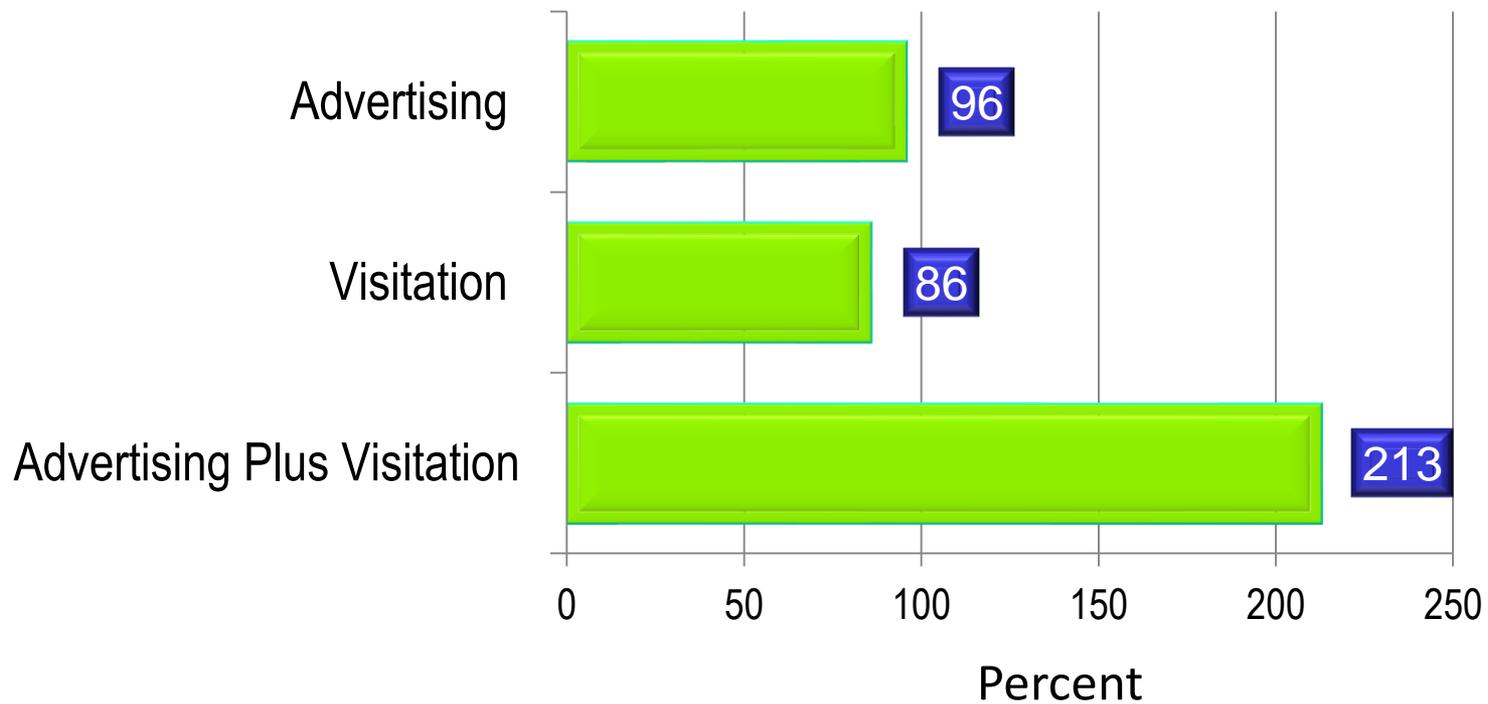
“A Good Place to Purchase a Vacation Home”

% Image Lift for Minnesota



“A Good Place to Retire”

% Image Lift for Minnesota



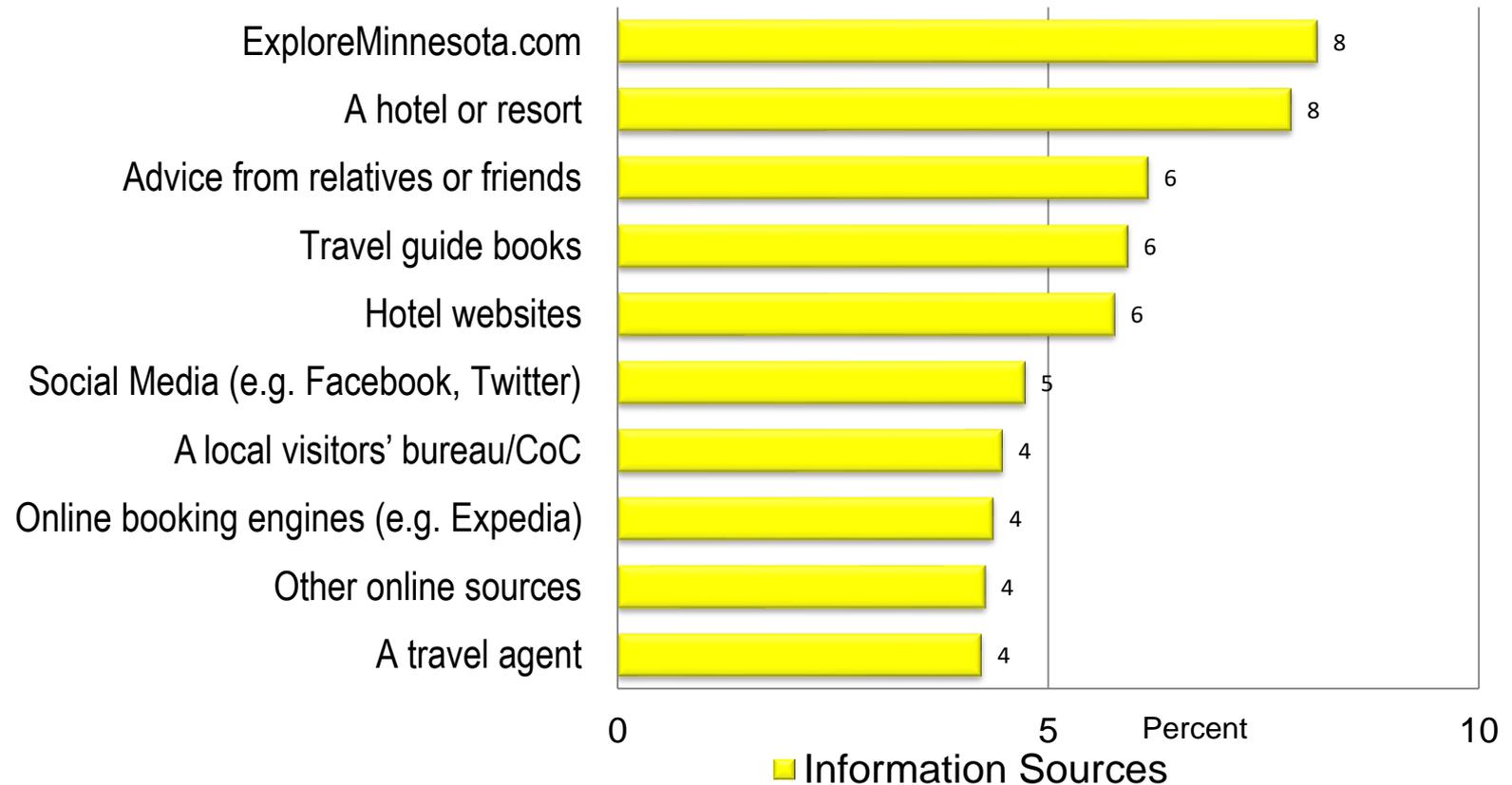


Longwoods
INTERNATIONAL

Information Sources and Social Media

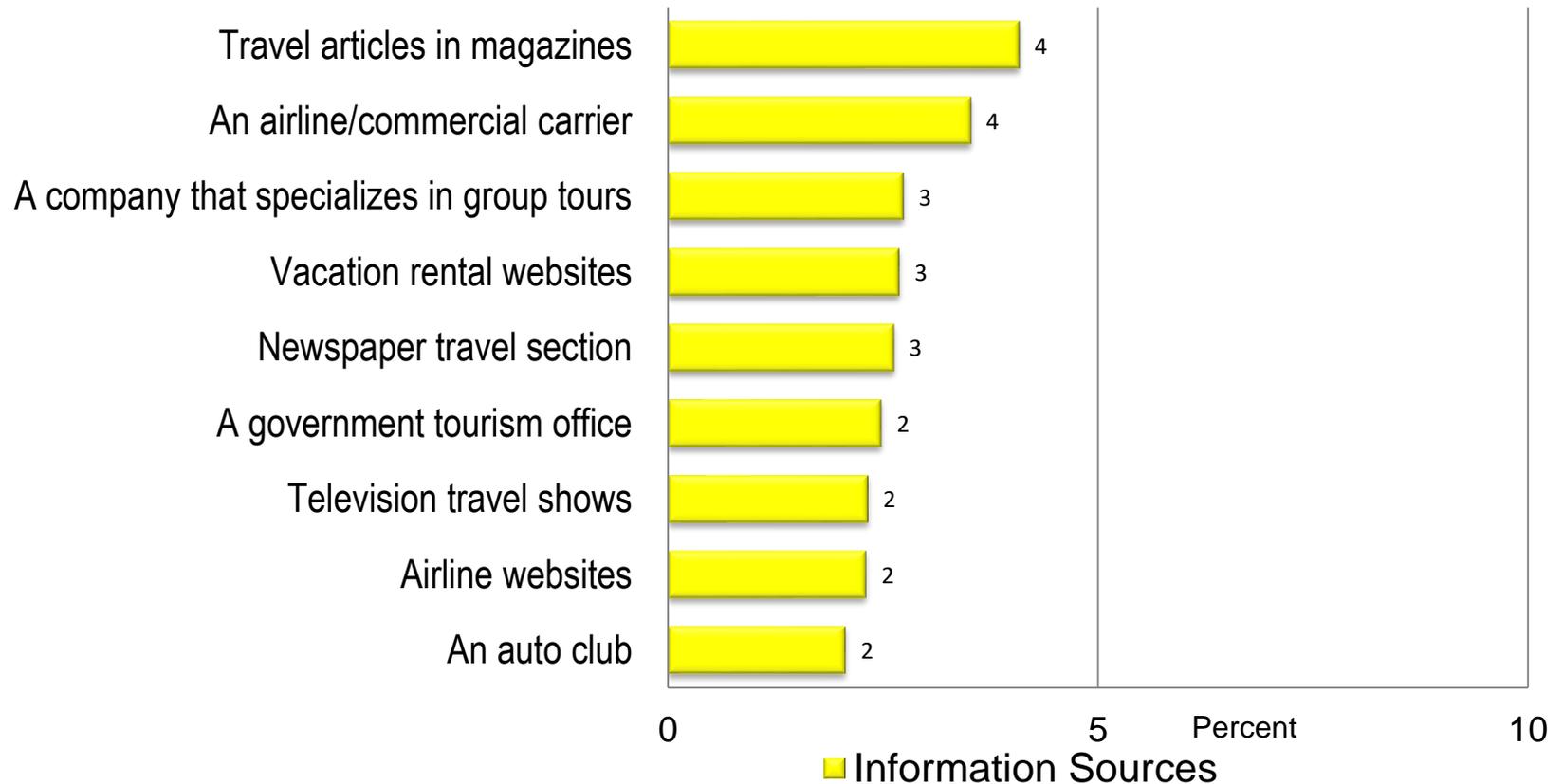
Information Sources Used for Trip Planning After Seeing Ads

Base: Residents of Minnesota's Regional Advertising Markets



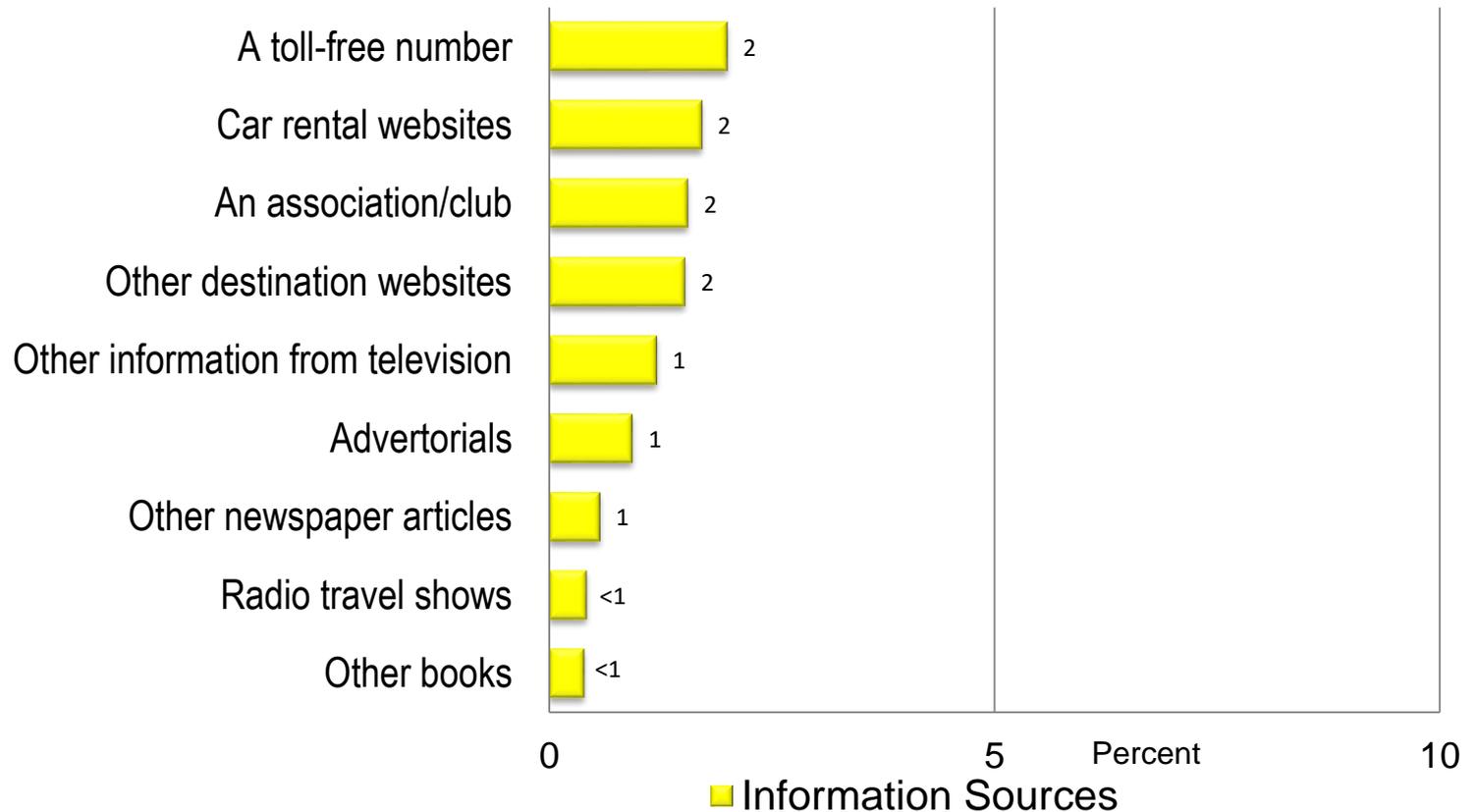
Information Sources Used for Trip Planning After Seeing Ads (Cont'd)

Base: Residents of Minnesota's Regional Advertising Markets



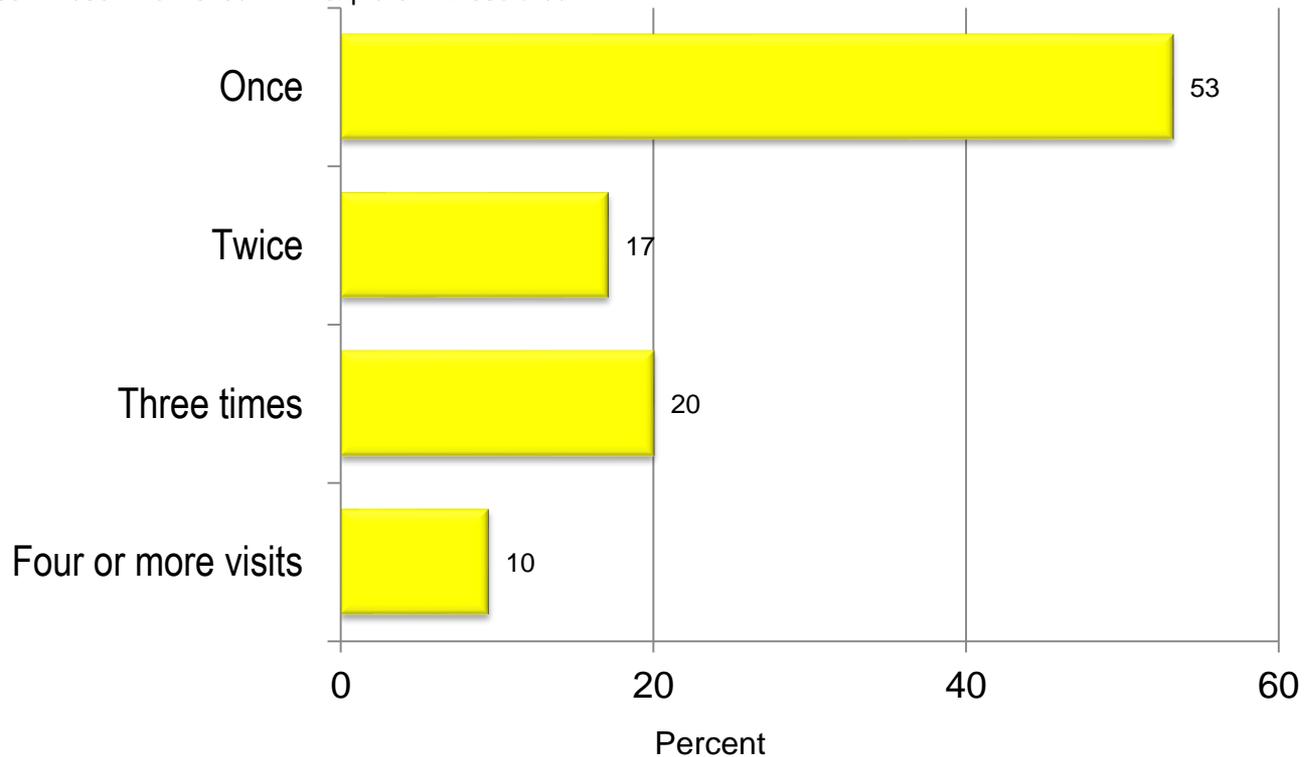
Information Sources Used for Trip Planning After Seeing Ads (Cont'd)

Base: Residents of Minnesota's Regional Advertising Markets



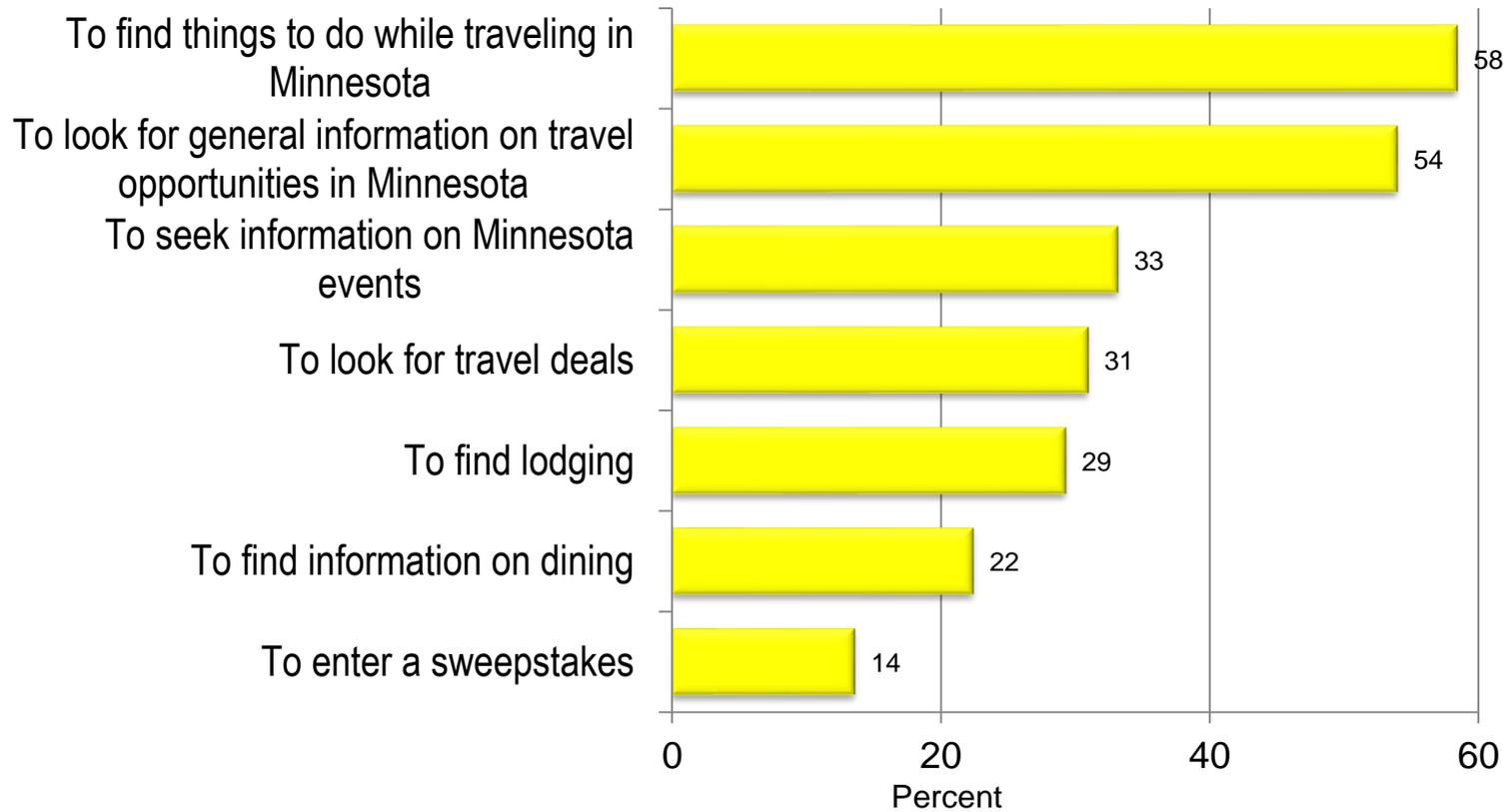
How many times did you visit www.exploreminnesota.com in 2017?

Base: Those who visited www.exploreminnesota.com



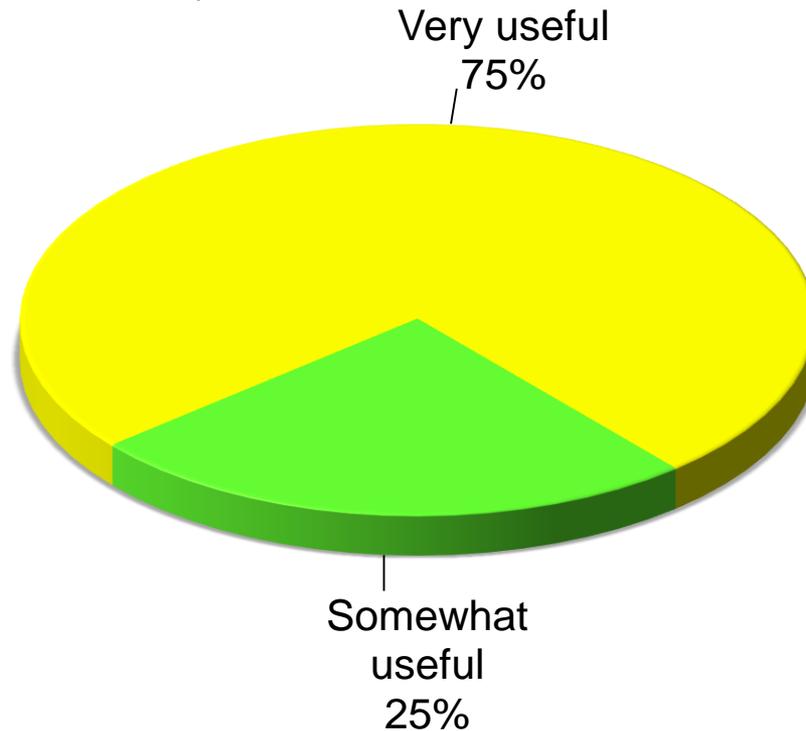
What did you use the website www.exploreminnesota.com for?

Base: Those who visited www.exploreminnesota.com



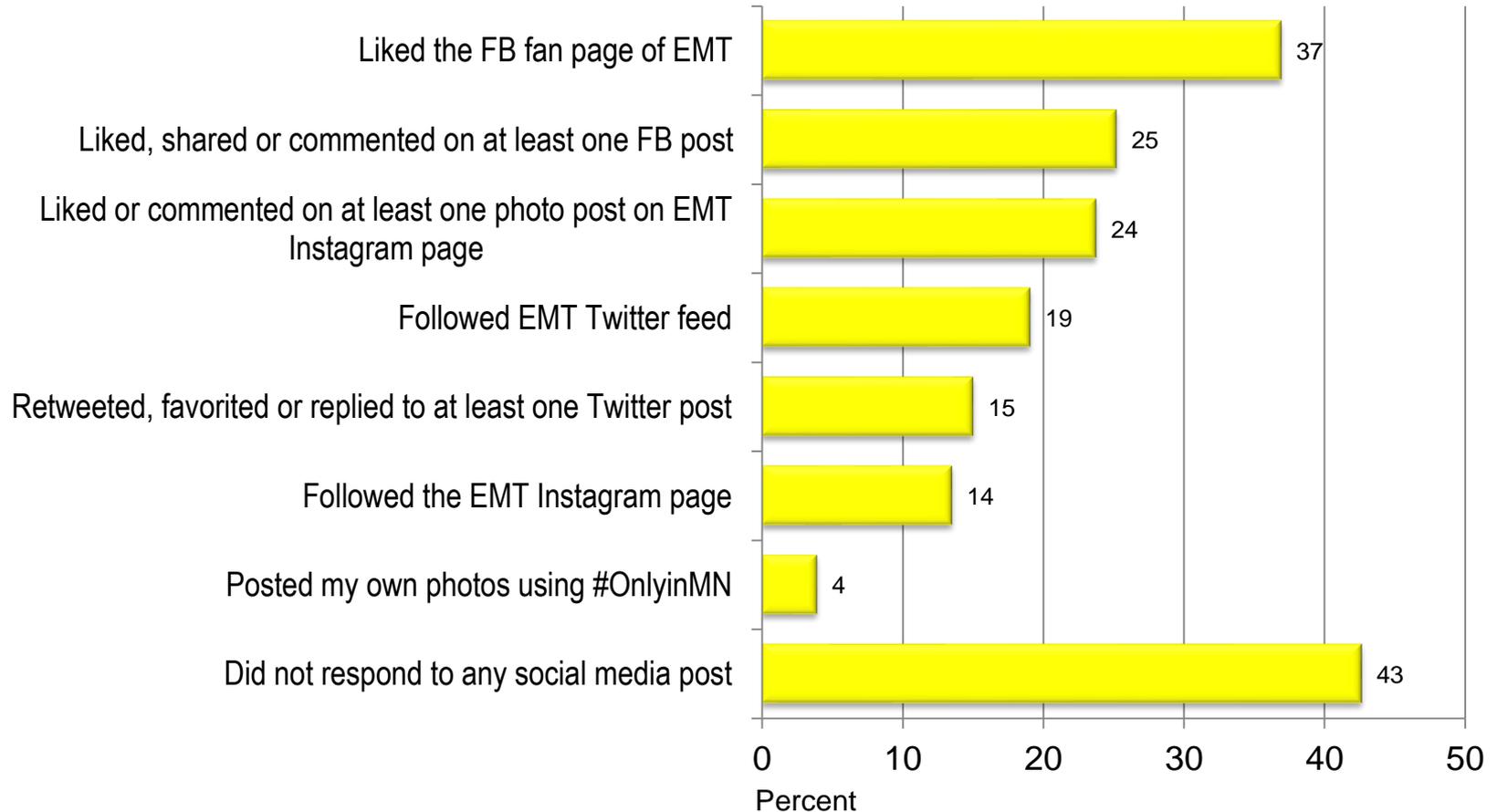
How useful was the www.exploreminnesota.com website?

Base: Those who visited www.exploreminnesota.com



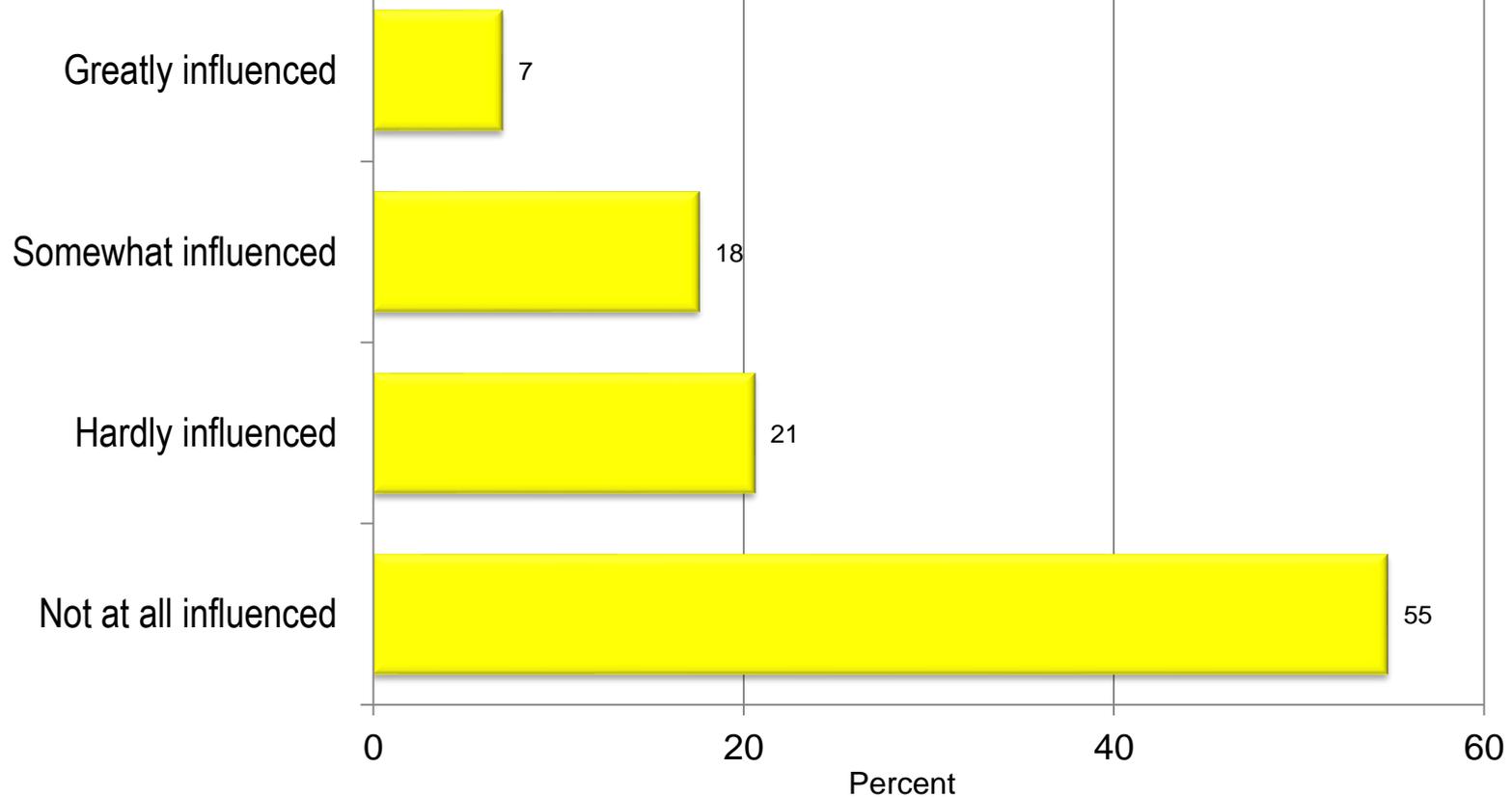
What actions did you take after seeing Minnesota Social Media Posts?

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



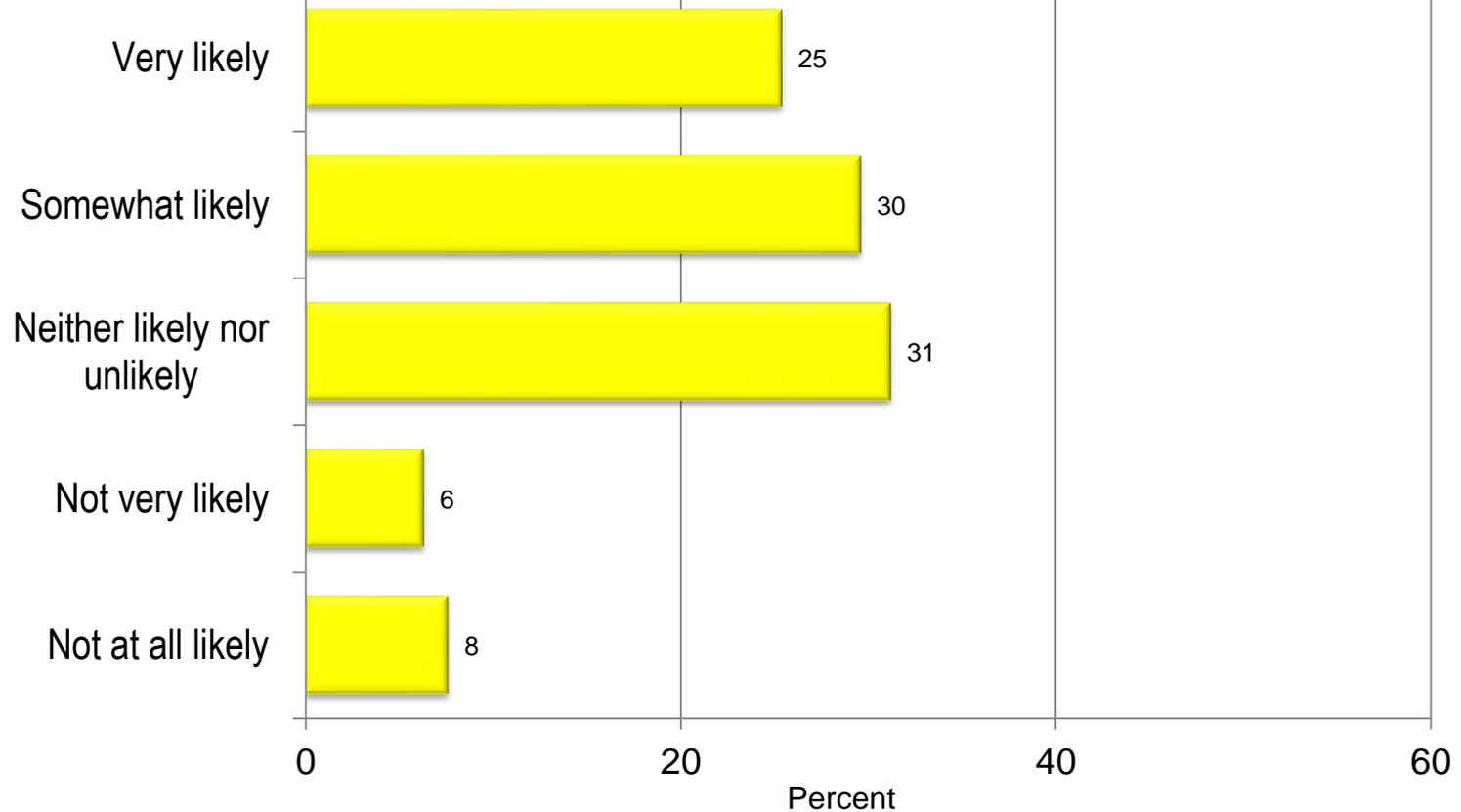
How much was your Minnesota travel influenced by Minnesota travel photos, videos, or comments on social media?

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



How likely are you to recommend Minnesota as a travel destination?

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





Quadrant Analysis of Strength versus Importance for Minnesota's Image Attributes

Image Quadrant Analysis

- 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

Minnesota Image Quadrant Analysis

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

Minnesota Image Quadrant Analysis (Cont'd)

- 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

Minnesota Image Quadrant Analysis

