



Minnesota

2012 Tourism Advertising Evaluation Study

Final Report
November 2012

Consultant's Report

Table of Contents



Research Objectives.....	3
Research Method.....	4
The Campaign.....	7
Main Findings.....	10
<i>Advertising Impacts.....</i>	<i>11</i>
<i>Awareness of Minnesota's Advertising.....</i>	<i>12</i>
<i>The Bottom line.....</i>	<i>16</i>

Research Objective

- The purpose of this research was to provide *an evaluation of Minnesota's Spring/Summer 2012 tourism advertising campaign in terms of:*
 - *Awareness of the advertising*
 - *The bottom line return on Minnesota's investment in the campaign in terms of :*
 - *Incremental travel to Minnesota.*
 - *Incremental traveler spending in Minnesota.*
 - *Incremental state and local taxes.*

Research Method



- ◉ The study was conducted among a representative sample of adult travelers residing in Minnesota's advertising markets*.
 - ◉ *'Travelers' mean respondents had taken a day and/or overnight pleasure trip anywhere in the past 3 years and intend to take another in the next 2 years.*
- ◉ The survey was conducted via a major American online consumer panel which is demographically balanced to represent the national population.
 - ◉ *1,404 individuals responded to the research.*

- *Survey sample markets were Minnesota, North Dakota, Illinois, South Dakota, Iowa, Wisconsin and Winnipeg, Manitoba, Canada
- Sample allocation was proportional to population

Research Method (Cont'd)

- Questionnaire content included:

- Travel to Minnesota**

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

- Advertising Awareness**

- Actual creative from the Spring/Summer 2012 campaign was exposed and respondents reported recall of each.
 - We use this forced exposure approach to ensure that we are measuring the State sponsored advertising only – not that of Minnesota attractions and accommodation facilities.

Research Method (Cont'd)

- ◉ ROI calculation:

- ◉ *The **Longwoods R.O.EYE™** method quantifies the relationship between awareness of campaign elements and trip taking.*
- ◉ *A baseline measure is generated to estimate the level of visitation that would have occurred in the absence of advertising activity.*
- ◉ *Using the principles and techniques of experimental design, we control for the effects of internal and external factors that could otherwise influence the result, such as economic conditions, catastrophic weather events, prior visitation, etc.*



The Campaign

Longwoods

INTERNATIONAL

vacationfun.com

Featured Destinations

Vacation Sweepstakes

Where To?

There's **MORE** TO EXPLORE IN Minnesota

Win a getaway to the Whitefish, Minnesota area!

Experience the recreation and relaxation of a real Minnesota vacation through a customized getaway! Select the style of lodging you prefer, as well as your dining and entertainment options that will create lasting memories for you.

MORE

WAYS TO GET MORE OUT OF SUMMER

Exploring landscapes, discovering small towns, tasting wine, hiking state parks, celebrating festivals and events, Minnesota has a myriad of ways to make the most of your long summer days. Take advantage of each opportunity and enjoy the best of Minnesota. Whether you're looking for a getaway, a weekend escape, or a day trip, there's something for everyone. Explore the state's diverse landscapes, small towns, and scenic views. Make the most of your summer getaway. Call 800-456-6789 or visit exploreminnesota.com

There's **MORE** TO EXPLORE IN MINNESOTA

WINERY

TRAVEL ROOM

GET AWAY

EXPLORE Minnesota ON YOUR MOBILE »

TO EXPLORE, MORE TO ENJOY.

Your Getaway Starts Here.

Order your Minnesota Explorer for tips, trip ideas and great features, including:

- Quirky roadside attractions
- Bike-friendly Minnesota
- Getting outside & playing with the kids
- A full calendar of events, fairs, arts and sports
- Minnesota Museum Month in May
- And many more

Order yours today!

There's **MORE** TO EXPLORE IN MINNESOTA

EXPLORE Minnesota

SPIN FOR A CHANCE TO WIN...

SPIN to WIN

MORE

For a chance to win **PLAY NOW**

EXPLORE Minnesota

NO PURCHASE NECESSARY. Promotion ends 6/10/2012. To enter and to see Official Rules, visit sweeps.exploreminnesota.com




- ⦿ The Minnesota *MORE TO EXPLORE* Campaign, including cooperative programs, ran during the Spring and Summer of 2012.
- ⦿ The media employed included print, television, radio and internet advertising.
- ⦿ The creative assets fell into either the primary "MORE to Explore" campaign or the "Spin To Win" promotional campaign.
- ⦿ All of the ads directed people to visit www.exploreminnesota.com

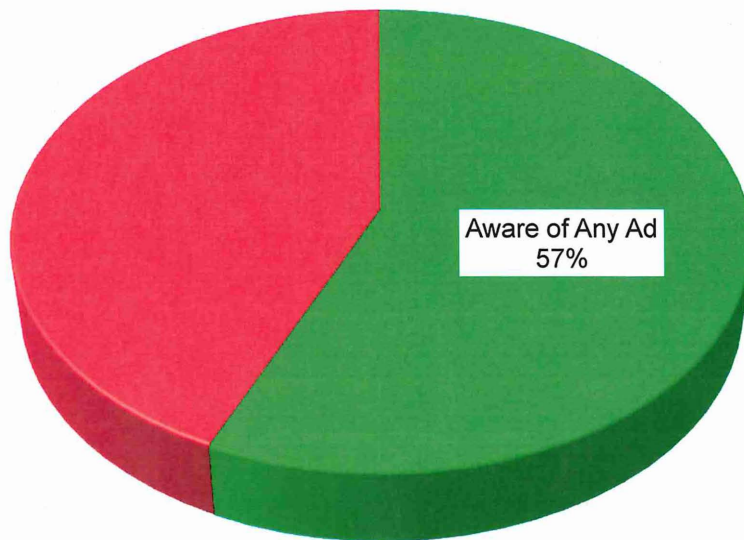


Main Findings

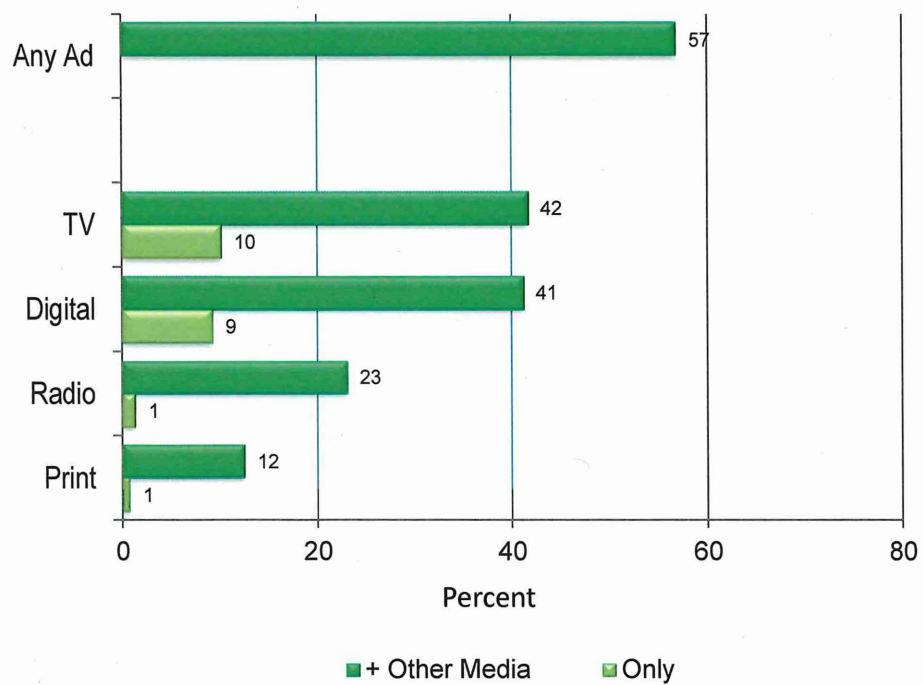
Advertising Impacts

- 
- 57% of all respondents were aware of at least one of Explore Minnesota Tourism's ads.
 - Among those who saw Minnesota ads in several types of media, ad recall was highest for television ads (42%), followed by digital ads (41%). Among those who only saw ads in one medium, TV ads had the highest recall (10%), followed by digital (9%).
 - The campaign generated 1.47 million incremental trips that would not otherwise have taken place, which brought \$153.6 million in incremental visitor spending, \$14.6 million in state and local taxes, 1,853 direct jobs and associated employee income of \$39.5 million.
 - It cost \$1.24 in advertising to generate each incremental trip.
 - Every \$1 invested in the Explore Minnesota Tourism ad campaign generated \$84 in traveler spending and \$8 in state/local tax revenue for the benefit of Minnesota residents. Every \$1000 invested created 1.01 Minnesota job.
 - In addition to the short-term impacts, we estimate that the advertising has influenced the planning of a further 500,000 trips to Minnesota in 2013. Although not all of these trips will happen, we expect that a sizeable proportion will convert, adding significantly to the return on Minnesota's investment in tourism marketing.

Awareness of Minnesota's Advertising



Awareness by Media



Incremental Trips, Spending and Taxes Due to Advertising



	2012 Ad Campaign
Ad Investment	\$1.832M
Incremental Trips	1.47M
Incremental Traveler Spending	\$153.6M
Incremental Taxes	\$14.6M
Incremental Jobs	1,853
Incremental Employee Income	\$39.5M


- Ad Investment includes Production/Fulfillment/Salary/Media Costs
- Effective tax rates developed from 2012 MN Adv. Impact Report = 3.5% Local and 6.0% State
- All incremental impacts are direct only

Campaign Efficiency



	2012 Ad Campaign
Ad \$'s per Trip	\$1.24
Trips per Ad \$	0.8

The Bottom Line in 2012



	2012 Ad Campaign
Spending ROI	\$84
Tax ROI	\$8
Income ROI	\$22
Jobs per \$1000 invested	1.01

Longer-term Impact of Advertising – Intent to Visit Minnesota



Intend to Visit Minnesota in Next 12 Months*	
Overnight Trip Intenders	0.3M
Day Trip Intenders	0.2M
Total Intenders	0.5M

* Among those who did not visit Minnesota in 2012