



Longwoods  
INTERNATIONAL

2023  
Minnesota  
Halo Effect Research

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# Methodology

- The Halo study was conducted after the conclusion of the Minnesota advertising campaigns from April 2022 – June 2022 to estimate the impact of advertising awareness and recent visitation on six key attributes associated with economic development.
  - A self-completion survey of 2,108 respondents in the advertising markets, distribution as follows:

<b>Minnesota</b>	120	<b>National</b>	
<b>North Dakota</b>	30	Often or Always Participate in	703
<b>Illinois</b>	207	Golf/Paddling/Music	
<b>South Dakota</b>	30	<b>Subtotal</b>	703
<b>Iowa</b>	65		
<b>Wisconsin</b>	125		
<b>Colorado</b>	126		
<b>Nebraska</b>	40		
<b>Montana</b>	30		
<b>Wyoming</b>	30		
<b>Indiana</b>	145		
<b>Michigan</b>	201		
<b>Utah</b>	65		
<b>Missouri</b>	131		
<b>Thunder Bay, Ontario, Canada</b>	30		
<b>Winnipeg, Manitoba, Canada</b>	30		
<b>Subtotal</b>	1405		

# Methodology (Cont'd)

- Respondents are members of one of North America's largest online consumer research panels, via Longwoods International's panel supplier Dynata.
- Adults 18 years of age and older were randomly selected from the panel to ensure a representative sample.
- National respondents qualified for sample via screener questions:
  - Indicate that they often or always participate in golf, paddling, or music.
- The fieldwork was conducted in April 2023.
- Median length of survey was 7 minutes.
- "Percent who strongly agree" is the percent of respondents giving a statement an agree/disagree rating of 8, 9 or 10 out of 10

# Methodology (Cont'd)

- Data were weighted on key demographic variables (geography, age, sex, household income, household size) prior to analysis to ensure that results are representative of and projectable to the traveler population in specific states.
- Sample was drawn to be proportionate to population by specific states/regions, age, sex and income.
- For a sample of this size, the confidence level is  $\pm 3$ , 19 times out of 20.



## Halo Effect on Economic Development Image

# Halo Effect Analysis

- 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 gains in image for Minnesota from its tourism advertising would extend beyond the appeal as a place to visit. Could it be that economic development objectives could also 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?
- Tourism functions as the front door for economic development because if Minnesota is successful in attracting visitors to the state, those people could view Minnesota more favorably as a place to live, raise a family, work in-person or remotely, start a business, attend college, purchase a vacation home, and retire.
- Longwoods International has conducted this research for multiple state and state destinations across the U.S since 2014.



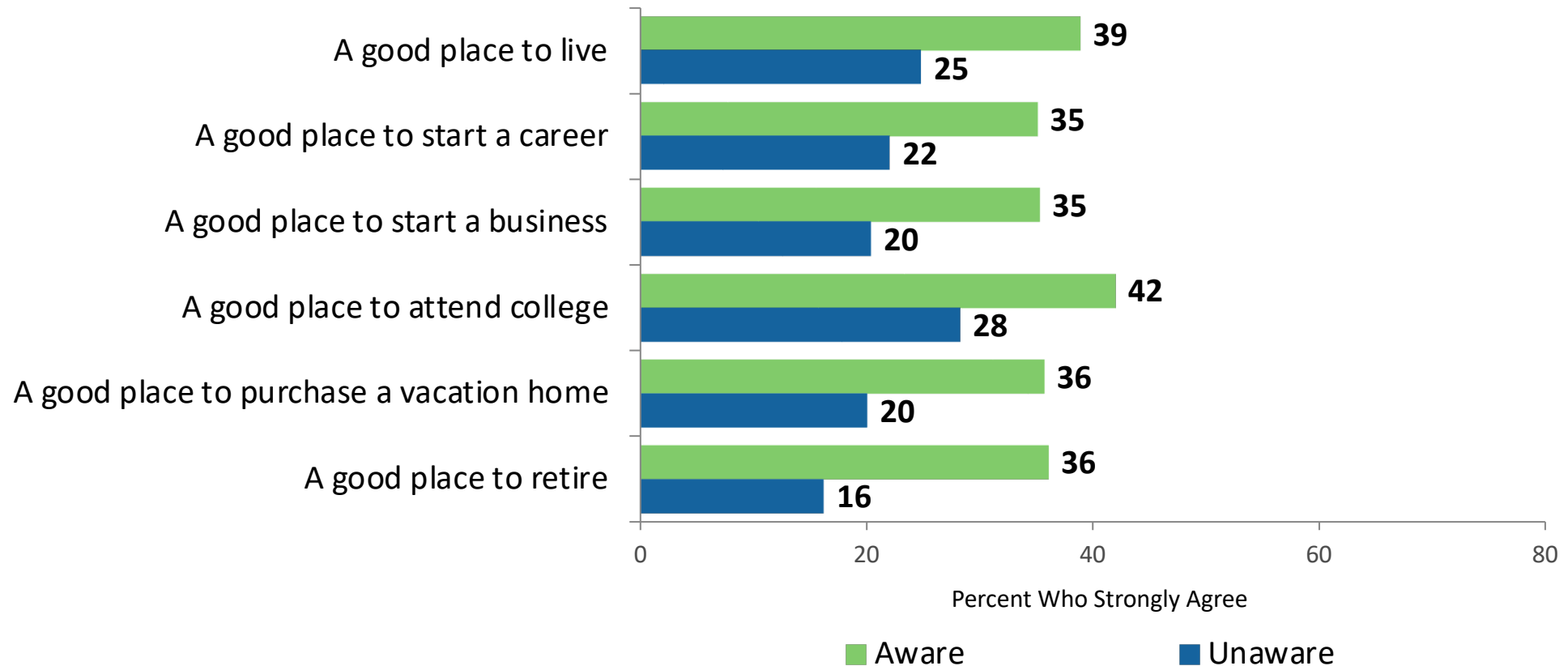
# Halo Effect Analysis

- The research compared consumers' ratings of Minnesota on economic development image attributes by those who had not seen the campaign or visited Minnesota with those who did see the tourism ads and/or visited.
- In every case, Minnesota's tourism advertising significantly improved the image of Minnesota across this wide range of economic development objectives. Travelers who saw the advertising rated Minnesota higher on all the economic development indicators included in the study.
- Similarly, travelers who visited the state in the past two years rated Minnesota higher on all the economic development indicators included in the study.
- For each economic development objective, the most dramatic improvement in image was among those consumers who were both exposed to the advertising campaign message and who also visited Minnesota. On all attributes measured, more of those who saw the advertising and visited the state rated Minnesota higher across these economic development indicators.
- These exceptionally positive results demonstrate that tourism plays a very powerful role in helping Minnesota achieve its economic development objectives and this new data will jumpstart that conversation.



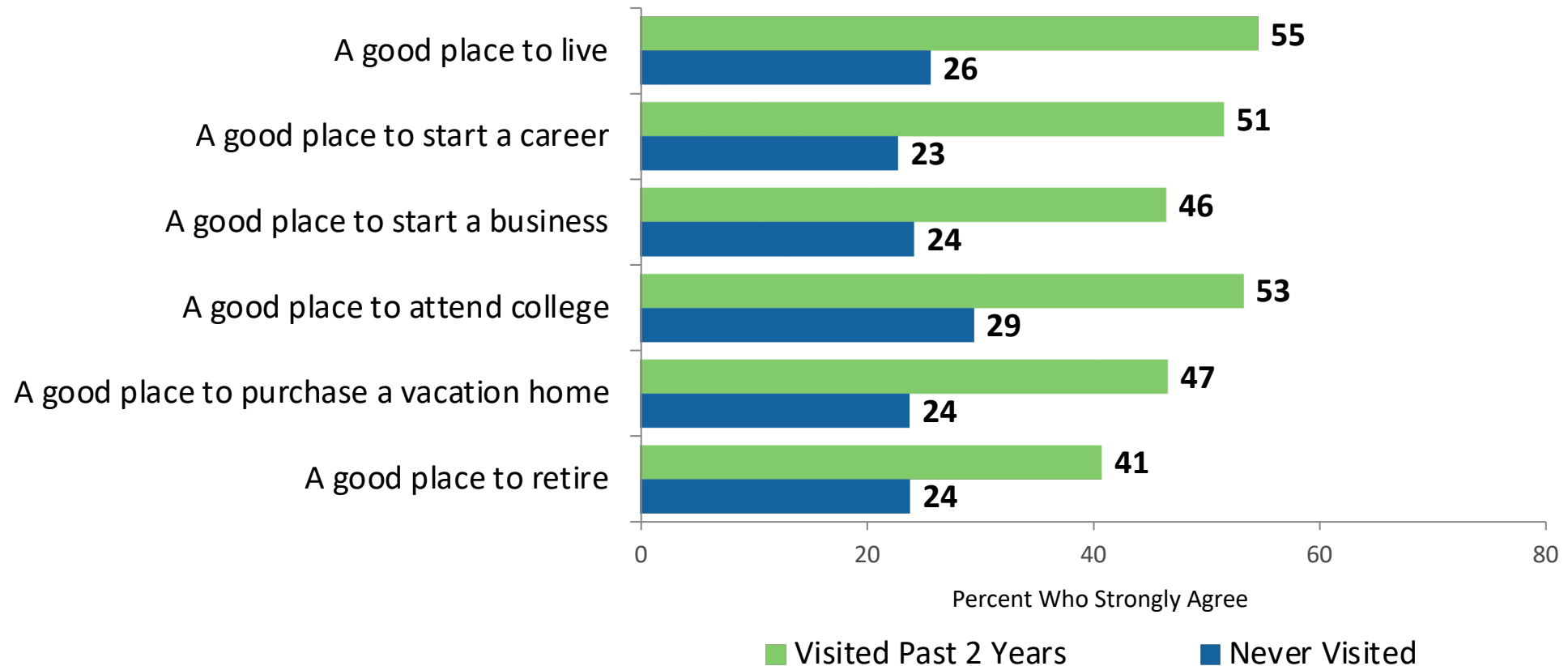
# Impact of *Tourism Ad Awareness* on Minnesota's Economic Development Image

Base: Out-of-State Residents of Minnesota's Advertising Markets



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

Base: Out-of-State Residents of Minnesota's Advertising Markets



# Impact of Ad Awareness *plus* Visitation on Minnesota's Economic Development Image

Base: Out-of-State Residents of Minnesota's Advertising Markets

