



EXPLORE **m** MINNESOTA™

Minnesota Livability Research

March 2024

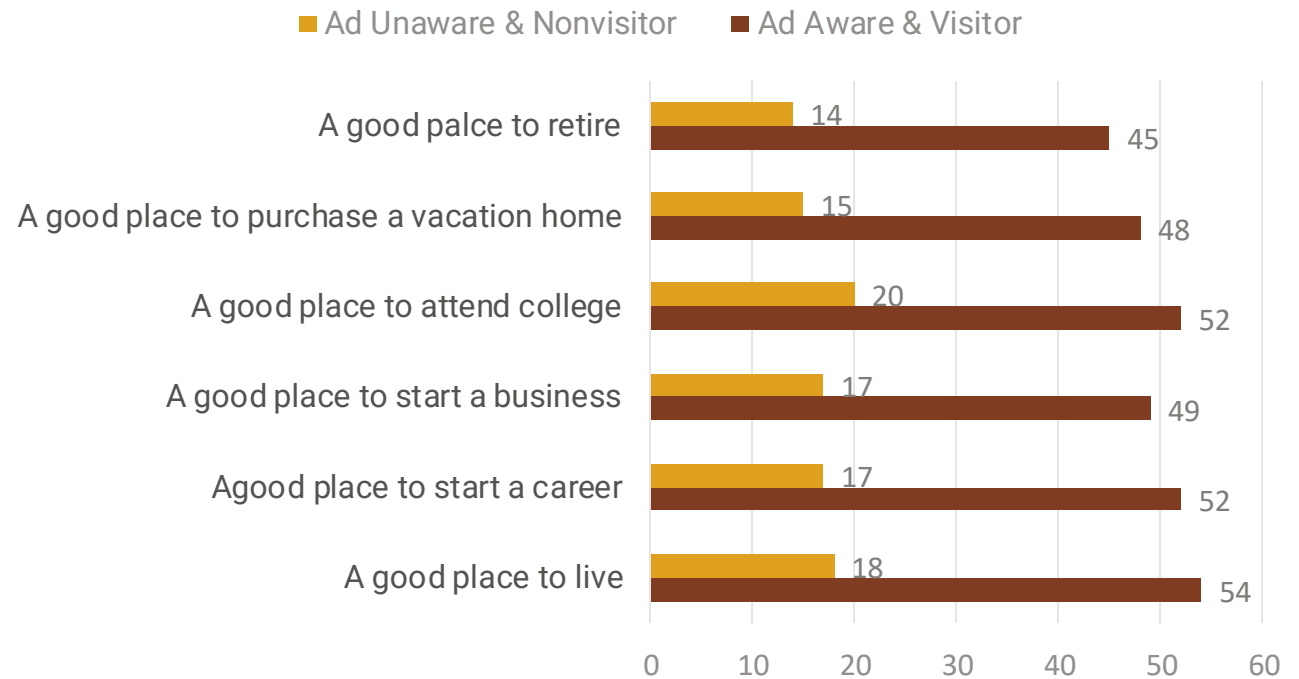
We have known that the positive impacts of tourism advertising campaigns extend beyond increasing the appeal of a destination as a place to visit.

Most recently, through a 2022 Longwoods Halo study, we confirmed that tourism advertising increases the favorability of Minnesota as a place to live and work.

Full [2023 Minnesota Halo Effect Research results](#) are posted on the industry website.

Tourism has a positive “halo effect” on economic development

Percent that Strongly Agree with Statement
Impact of EM 2022 S/S Campaign



Source: Longwoods 2023 study measuring the impact of Explore MN 2022 Spring/Summer Ad Campaign

Traveler profile studies consistently reveal Minnesota is a top destination based on travel motivators, including outdoor recreation.

SMARI Traveler Profile Studies include the question “How much do you agree that each of these statements describes MN?”. In the 2023 study the statement “great place to live” received a score of 4.2 which is in the top 10% compared to benchmarks.

Full [2023 Winter and Spring/Summer Minnesota Traveler Profiles](#) are posted on the industry website.

Visitors agree Minnesota has a lot to offer, is a great place to live

How much do you agree that each of these statements describes MN?	Summer 2023 Score
Has great outdoor activities	4.5
Has four amazing seasons	4.4
Has great options for families with children	4.3
Is a place I feel welcome	4.3
Great place to live	4.2
Has vibrant cities	4.1
Great place to work	4.0

Source: SMARI 2023 Spring/Summer Traveler Profile



Resident & non-resident research

Research objective was to inform a refreshed Minnesota brand platform focused on driving migration into the state.

Two online surveys were distributed to 21- to 55-year-olds in November 2023.

Non-Minnesota residents:

- 1,085 individuals open to moving to Minnesota
- Current residents of the following target states: CA, CO, FL, IL, IN, IA, MA, MI, NY, ND, OH, SD, TN, TX, WA and WI



Resident & non-resident research summary

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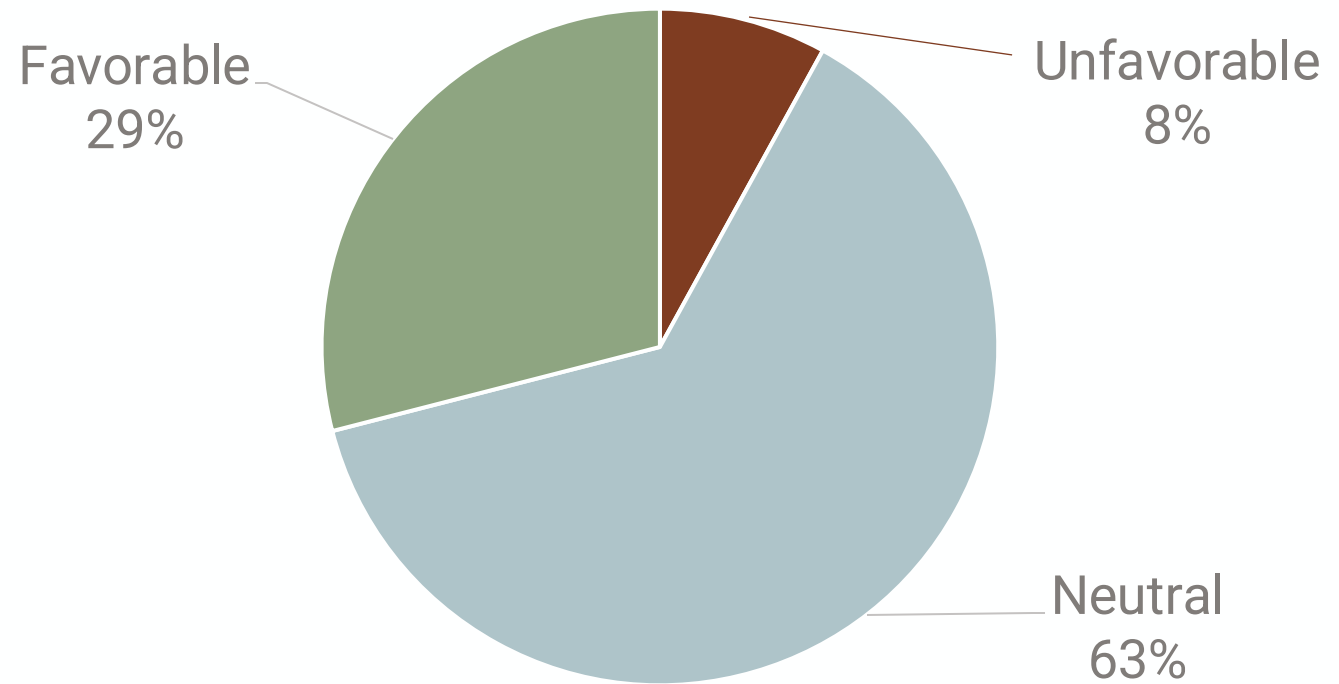
Non-resident knowledge of Minnesota

Target state residents were asked how familiar they are with certain states. For Minnesota, 30% have a low amount of knowledge, 48% have a neutral amount of knowledge, and 22% a high amount of knowledge.

Most (92%) target state residents have a neutral or favorable view of Minnesota, and therefore are open to state messaging.

Most target state residents have limited MN knowledge, but they're open minded

Target State Residents' Opinion of Minnesota

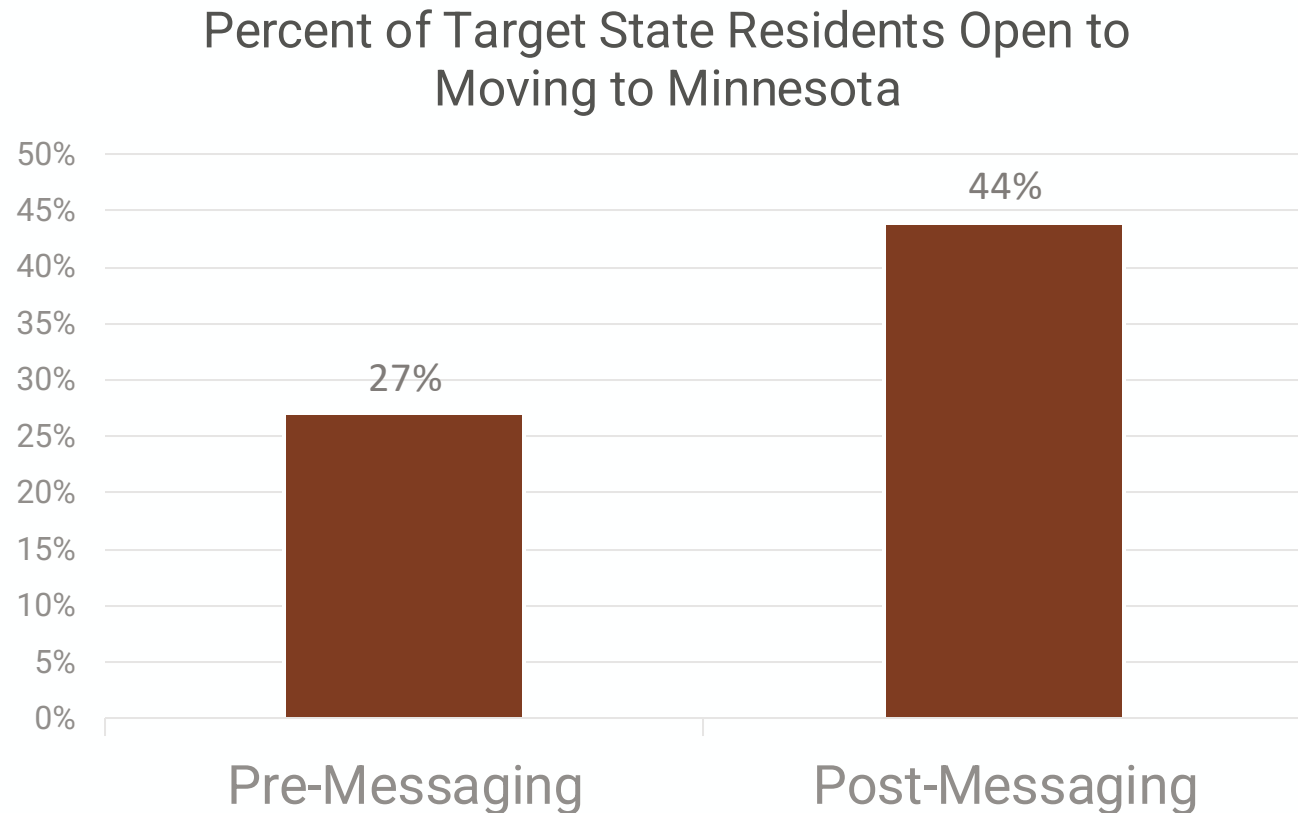


Target state residents were presented 12 statements about Minnesota.

After receiving this messaging, the percent interested in moving to Minnesota for personal or professional reasons increased from 27% to 44%.

The 12 messages resonated especially well with parents, progressive Democrats and the LGBTQIA+ community.

Interest in moving to Minnesota increases after messaging



Source: 2023 SocialSphere Brand Refresh Study



Key research questions



What drives people's perceptions, interests and decisions to move to or visit a state (and Minnesota specifically)?

The three most important factors are:

1. Overall quality of life
2. Economy and security
3. Livability

Six important factors in deciding where to live

1 Quality of Life



- Is a beautiful place to live
- A place where I can see myself living happily for a long time
- Is welcoming to all
- Is good for overall health and wellbeing
- ♦ Has high-quality health care
- ♦ A place to feel proud about

2 Economy / Security



- Is a place where I can achieve my career goals
- Has high quality job opportunities
- Is safe

3 Livability



- Has access to nature and outdoor spaces
- Is affordable
- Has home ownership opportunities
- Is peaceful and quiet

4 Diverse/Growing



- Is culturally diverse
- Has vibrant cities and metropolitan areas
- Is committed to equity and inclusion for all
- Is growing and evolving
- ♦ Prioritizes environmental sustainability

5 Family / Schools



- Has good schools
- Is a good place to raise a family

6 Civics / Community



- Has citizens who are engaged in their communities
- Has entrepreneurial opportunities
- Has people like me
- Aligns with my political values



What does Minnesota own in its residents' and recent transplants' hearts and minds?

Minnesotans are proud and really love calling their state home. They rate Minnesota well on important attributes, including:

- Is a place where I can see myself being happy for a long time
- Is a beautiful place to live
- Has high quality healthcare
- Is good for overall health and well-being
- Has access to nature and outdoor spaces

Where to live factors – MN ranking with non-residents based on factor importance and state performance

Non-Minnesotans give
our state high
performance marks for
the six high importance
factors in Quadrant B.

Importance

Quadrant A: High Importance/Low Performance

- Is a good place to raise a family
- Is welcoming to all
- Has high quality health care
- Is a beautiful place to live
- Has high-quality job opportunities
- Is a place where I can see myself being happy for a long time
- Is a place to feel proud of

MN compares LESS
favorably to other states

where I can achieve my career goals

Quadrant B: High Importance/High Performance

- Is safe
- Has access to nature and outdoor spaces
- Is good for overall health and wellbeing
- Is affordable
- Has home ownership opportunities
- Is peaceful and quiet

MN compares MORE
favorably to other states

Quadrant C: Low Importance/Low Performance

- Has good schools
- Is committed to equality and inclusion for all
- Has citizens who are engaged in their communities
- Is culturally diverse
- Has people like me
- Has entrepreneurial opportunities
- Has vibrant cities and metropolitan areas
- Aligns with my political values

Quadrant D: Low Importance/High Performance

- Prioritizes environmental sustainability
- Is growing and evolving

Where to live factors – MN ranking with current MN residents based on factor importance and state performance

Minnesotans give our
state high performance
marks for the ten high
importance factors in
Quadrant B.

Importance

Quadrant A: High Importance/Low Performance

- Is peaceful and quiet
- Has home ownership opportunities
- Is safe
- Is affordable

MN compares LESS favorably
to other states

Quadrant C: Low Importance/Low Performance

- Is committed to equality and inclusion for all
- Has citizens who are engaged in their communities
- Is culturally diverse
- Has entrepreneurial opportunities
- Has vibrant cities and metropolitan areas
- Aligns with my political values
- Is growing and evolving

Quadrant B: High Importance/High Performance

- Is a place where I can see myself being happy for a long time
- Is a beautiful place to live
- Has high quality healthcare
- Is good for overall health and wellbeing
- Has access to nature and outdoor spaces
- Is welcoming to all
- Is a place where I can achieve my career goals
- Has high quality job opportunities
- Is a place to feel proud about
- Is a good place to raise my family

MN compares MORE
favorably to other states

Quadrant D: Low Importance/High Performance

- Has good schools
- Has people like me
- Prioritizes environmental sustainability



What themes differentiate Minnesota and could attract non-residents to our state?

Minnesota is in a strong position to recruit new residents. The top five facts that are likely to encourage individuals to consider Minnesota are:

1. Minnesota's **cost of living** is below the national average
2. Minnesota is ranked as a top-5 overall state based upon a number of **quality-of-life factors**
3. Minnesota has been recognized among the **healthiest and happiest states** in the country
4. Minnesota, you're never far from the **beauty of nature**
5. Minnesota is home to one of the most **vibrant arts, entertainment and culinary scenes** in the county

Top 5 Statements about MN – appeal based on group

For those in target states that are the most likely to shift their state of residence, the statement about Minnesota’s cost of living was the most appealing.

Top 5 Statements About Minnesota (Top 2 Box, Local and Target State Samples)

Please rate the appeal of the following statements about the state of Minnesota.

	All, MN Residents	All, Target State	Target State Shifters (2+) ▼
[COST OF LIVING] Minnesota’s cost of living is below the national average and it is a top 5 state for homeownership with a high median family income.	54%	62%	69%
[QUALITY OF LIFE] Minnesota is ranked as a top-5 overall state based upon a number of quality-of-life factors including infrastructure, health care, economy, opportunity and natural environment – and was also ranked as the 4th best state to live and work.	62%	58%	67%
[HEALTHY AND HAPPY] Minnesota has been recognized among the healthiest and happiest states in the country – and the least stressed.	62%	61%	67%
[PROXIMITY TO NATURE] In Minnesota, you’re never far from the beauty of nature. The state boasts immense forests, rugged bluffs, easy access to parks, and more than 10,000 lakes.	70%	56%	63%
[VIBRANT ARTS AND CULINARY SCENE] With an abundance of restaurants, theaters, music venues, museums, galleries and festivals, Minnesota is home to one of the most vibrant arts, entertainment, and culinary scenes in the country.	54%	53%	60%

N=1,021 21-55-Year-Old Current Minnesota Residents || N=1,081 18-55-Year-Old Residents of Target States || November 2023

Source: SocialSphere, Inc.

Statements 6 to 12 about MN – appeal based on group

For those in target states that are the most likely to shift their state of residence, the statement about Minnesota having engaged citizens and being a top state for voter participation was the least appealing.

Statements (ranked #6-12) About Minnesota (Top 2 Box, Local and Target State Samples)

Please rate the appeal of the following statements about the state of Minnesota.

	All, MN Residents	All, Target State	Target State Shifters (2+) ▼
[RAISE A FAMILY] Minnesota is recognized among the “Best States to Raise a Family” and in the top five states for child well-being.	61%	51%	59%
[ACTIVE LIFESTYLE YEAR-ROUND] Minnesotans enjoy the joy and beauty of the four seasons living active outdoor lifestyles all year-round. From hiking, biking, fishing, or boating to skiing, snowmobiling, and ice skating.	65%	56%	58%
[STRONG ECONOMY/JOB MARKET] Minnesota’s economy creates room for everyone to thrive. It’s home to 16 Fortune 500 companies that span multiple industries, including 3M, General Mills, UnitedHealth Group, U.S. Bancorp, Target, and Best Buy.	50%	49%	55%
[DIVERSITY] Minnesota celebrates its diverse cultures and communities, from its Dakota and Ojibwe roots to its Scandinavian heritage to its thriving Hmong, Somali, and Mexican populations.	48%	48%	51%
[CULTURE OF INNOVATION AND CREATIVITY] Minnesota has long been a culture of innovation and creativity. From the furnace thermostat to post-it notes and the implantable pacemaker, the state is home to companies that have changed the way the world lives.	49%	45%	50%
[GOOD AIRPORT/CENTRALLY LOCATED] Minneapolis-St. Paul International Airport has been ranked as the best airport of its size in North America. Its central location means travelers can get practically anywhere in the country within a 4-hour flight.	50%	45%	50%
[ENGAGED CITIZENS] As one of the top states for voter participation, volunteering, and workforce participation, Minnesotans are engaged and invested in their communities.	48%	44%	49%

N=1,021 21-55-Year-Old Current Minnesota Residents || N=1,081 18-55-Year-Old Residents of Target States || November 2023

Source: SocialSphere, Inc.



More non-resident insights



BIPOC analysis

When comparing their current state of residence to Minnesota, BIPOC survey respondents are more likely than White respondents to see Minnesota as a place where they could live happily for a long time and achieve their career goals compared to where they live now.

They were also more optimistic about achieving their career goals in Minnesota, feeling safe and having a better sense of health and well-being versus their home state.



Income analysis

People earning higher incomes (\$75K or more) who are open to moving to Minnesota prioritize health care, well-being, home ownership, schools and career goals more than those who earn less than \$75,000 a year.

Notably, neither income group sees the job opportunities as better in Minnesota than where they live now.



Northeast & Midwest markets

The Northeast and Midwest regions have the highest potential for attracting new Minnesotans.

Northeasters see Minnesota as very livable but need convincing that our quality-of-life features like high quality healthcare are better.

Midwesterners recognize the quality of both jobs and healthcare available in MN. They are also more likely to say that Minnesota is welcoming to all.



Minnesota visitors

In this study, half of the respondents have been to Minnesota at least once in the past ten years.

After seeing the messages about Minnesota, visitor openness to moving to Minnesota shifted from 39% open to 51% being open to relocating.

For those who had not previously visited Minnesota, openness to moving to Minnesota shifted from 17% to 37% being open to relocating after seeing messages.

Visitors and non-visitors find similar messages about cost of living, being one of the “happiest” states, being close to nature and strong quality of life appealing.



More resident insights



College students

College students in Minnesota are very open to living in the state for at least a few more years. They will be looking for jobs in business, math/computer science, and the health sciences.

In addition to quality-of-life factors and economic security, students new to the state are especially attracted to Minnesota's lower cost of living, diversity, and access to nature for year-round activity.



Transplants vs. Boomerangers

While both Minnesota Transplants and Boomerangers moved in part for a better quality of life, Boomerangers are twice as likely to have moved back to be closer to family.

Transplants often come to Minnesota for a new job opportunity.



MSP v. Greater Minnesota

When looking at Minnesota residents only, those in the Minneapolis-St. Paul metro area are slightly more open to moving out of the state for personal or professional reasons.

Regardless of where they live, priorities are not very different based on where people live and residents see Minnesota as excelling on all attributes, such as quality of life, livability and economic security compared to neighboring states.

Finally, 68% would recommend Minnesota to someone else.



Favorite things about MN

Residents were asked to share their favorite thing about the state as part of a series of open-ended questions.

Current residents are most likely to cite natural beauty and recreation opportunities as something they appreciate about Minnesota.

A sense of community and the people are the second most frequently selected response categories.



Areas for improvement in MN

Minnesota residents' areas for improvement mainly center on improving infrastructure, education and transportation.

Economic and financial concerns are the second most frequently cited categories, mainly driven by comments related to lowering taxes and the cost of living.



Reasons to move or stay

Minnesota residents said that reasons to consider moving from the state are cost of living (29%), high taxes (24%) and better job opportunities elsewhere (18%).

Reasons to stay are friends and family (53%), followed by a belief that Minnesota is a simply a great place to live (12%).



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Thank you