

Green Bay 2025

Brand Health Lite and Halo Research

ICE AGE TRAIL
FORESTVILLE SEGMENT

PER
STATE, TRAIL

Table of Contents

- 3 About Longwoods International
- 4 Research Overview: Brand Health Lite and Halo Research
- 5 Survey Methodology
- 6 Key Findings
- 8 Advertising Awareness
- 12 Destination Visitation and Interest
- 15 Image Overview
- 18 Image vs. The Competition
- 21 "Halo Effect" on Economic Development
- 26 NFL Draft

ABOUT LONGWOODS INTERNATIONAL

Established in 1978 as a market research consultancy, Longwoods International is a premier market research firm that is a respected leader within the travel and tourism industry. With offices in Toronto, Ohio, Indiana, Michigan, New York, North Carolina, Illinois and Green Bay, Longwoods **conducts strategic market research** for public- and private-sector clients throughout North America, Europe and the Pacific Rim.

Longwoods is known for a multitude of destination marketing services, most notably:

➔ **Overnight and day visitor profiles**, including visitor volumes and expenditures, through **Travel USA®**, the largest American domestic travel study, begun in 1990.

➔ **Destination advertising awareness, return-on-investment of advertising campaigns**, and **measuring the impact of advertising on a destination's image** across a wide range of leisure travel attributes.

➔ **"Halo Effect"** of tourism advertising on a destination's image for broader economic development objectives.

➔ **Resident sentiment research**, which investigates both practical and emerging concerns among residents in a destination regarding tourism, including topics such as economic development, perceived environmental impacts, overtourism, and residents' quality of life.

➔ **Custom qualitative and quantitative research**

Soundly grounded in scientific principles, our research methodologies have been **peer-reviewed**, intensely scrutinized by legislators and the media, and critically evaluated by academics and economists. Our **scientific integrity has been recognized** with numerous Best Practice awards, as well as invitations for speaking engagements across North America.

With the acquisition of Clarity of Place, Longwoods now also offers cutting-edge approaches to help destinations **evaluate the alignment of the needs of visitors with those of residents**, the community capacity for destination growth, the health of their brand, and their ability to remain competitive.



PROJECT OVERVIEW

Longwoods was engaged to conduct a program of research designed to measure advertising awareness of the Green Bay advertising campaigns and the destination's brand health.

This study profiled:

- The image of Green Bay in the areas that are important to travelers
- Green Bay's image strengths and weaknesses versus competitors
- Interest in visiting Green Bay versus competitors
- Awareness of Discover Green Bay advertising campaigns
- Impact of Discover Green Bay's marketing efforts on economic development initiatives, the "Halo Effect"
- Visitation or viewing of the NFL Draft and impacts on destination image

The campaign consisted media including:

Digital/Social
Video

Survey fielded in **8 key markets** and received **1000 qualified respondents**.

Qualified respondents are **adult travelers*** and members of major online consumer research panel.

Sample drawn to be **representative and proportionate to sample DMAs, age, and gender**.

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 markets.

Fieldwork was conducted in September 2025. Median survey length was 9 minutes. For a sample of this size, **the confidence level is + / -3, 19 times out of 20**

Sample Markets + Respondent Distribution

Minneapolis - Saint Paul (275)

Chicago (400)

Marquette (15)

La Crosse-Eau Claire (35)

Madison (65)

Milwaukee (130)

Wausau-Rhineland (30)

Green Bay-Appleton (excluding Brown County) (50)

ADVERTISING

Over half (53%) of travelers in Discover Green Bay's key advertising markets recalled seeing at least one Discover Green Bay advertisement during the January - December 2023 & 2024 campaign(s).

Almost half (47%) remembered at least one digital/social ad, followed by video (43%).

The ads with the highest level of recall in the key advertising markets were:

- City Winter GB - Video - 29%
- Abundant Waters 2 - Digital/Social - 29%
- Abundant Waters 1 - Digital/Social - 28%
- Beyond Football 3 - Digital/Social - 28%
- Core Memories Family - Video - 26%

BRAND HEALTH

Relative to the other destinations in the competitive set for this study, Green Bay is the leader in its overall image among key advertising market travelers. Across the key advertising markets surveyed, about half (49%) rated Green Bay very favorably as a destination they “would really enjoy visiting.” Green Bay performs at the top of its entire competitive set above Buffalo, NY (42%), and South Bend, IN (31%).

Overall, Green Bay performed positively with key advertising market travelers regarding the percentage those who strongly agreed with each attribute/perception. Half of the fourteen attributes/perceptions included in the study garnered at least half or more travelers who strongly agreed. The top three performing attributes/perceptions are:

Great for professional or college sporting events

Safe to travel anywhere in this place

A good place for families to visit

Green Bay is ahead of its competitive set and performs significantly higher in nine of the fourteen destination attributes/perceptions that were included in the study. The five attributes/perceptions where Green Bay is either tied or behind its competitors are:

Great for photographs and social media

Noted for its cultural offerings

Different cultures/ways of life

Interesting/notable culinary scene

A great climate overall

[ADVERTISING AWARENESS]

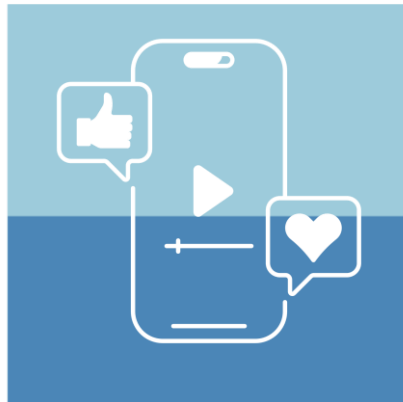


AWARENESS* OF THE AD CAMPAIGN

53%

Aware of
Any Ad

DIGITAL/ SOCIAL AWARE



47%

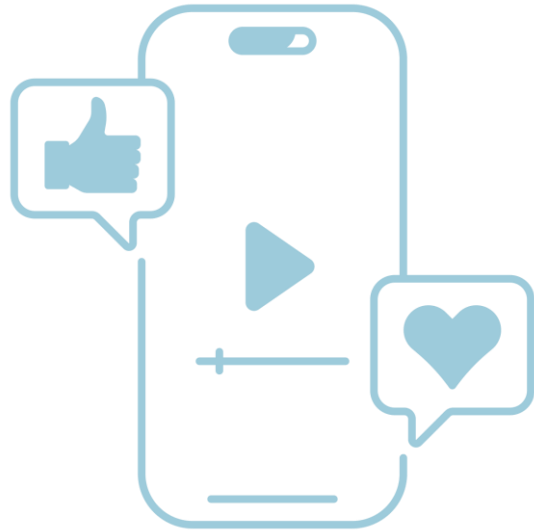
VIDEO AWARE



43%

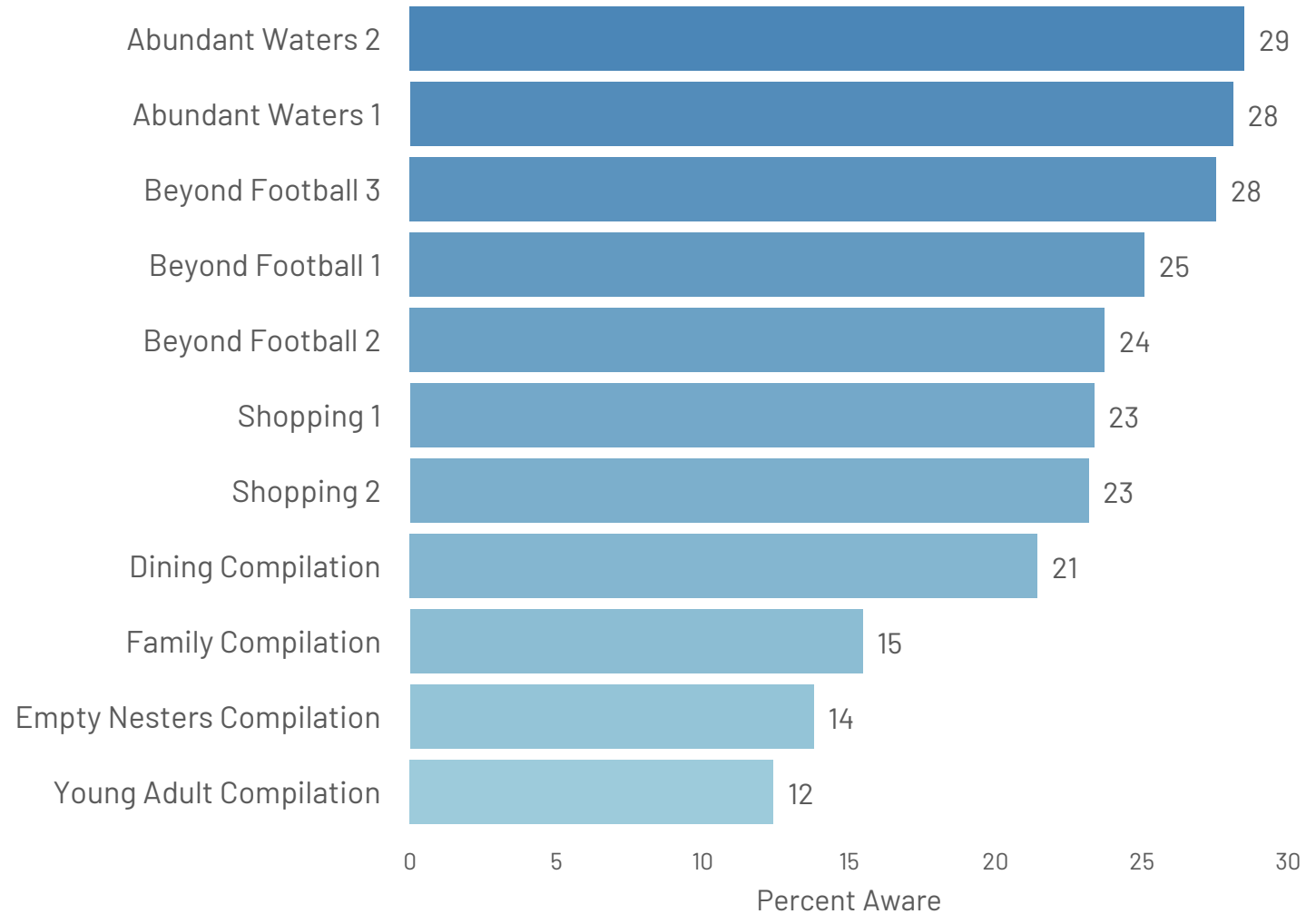
*Saw at least one ad and based on markets where shown
Base: Total Markets

AWARENESS* OF DIGITAL/SOCIAL ADS



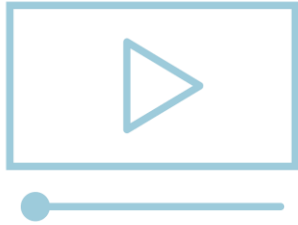
**Digital/Social Ad
Awareness**

47%

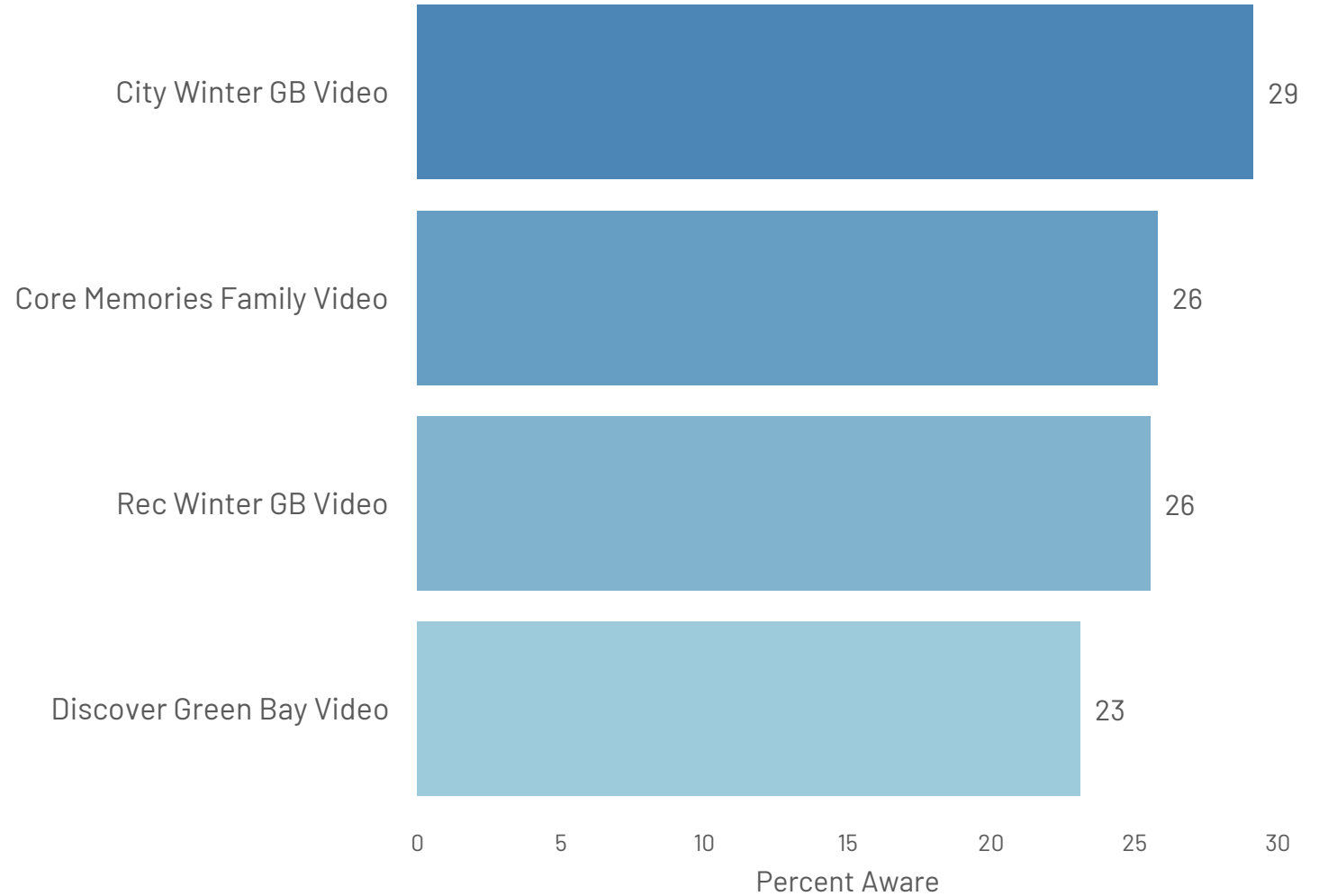


*Saw at least one ad and based on markets where shown
Base: Total Markets

AWARENESS* OF VIDEO ADS



**Video Ad
Awareness**
43%



*Saw at least one ad and based on markets where shown
Base: Total Markets



DESTINATION VISITATION
AND INTEREST



PAST VISITATION



58% of travelers within Discover Green Bay's key markets have visited the city during their lifetime. Among those, 68% have visited during the past 2 years.

	Ever	Visited Past 2 Years*
Green Bay, WI	58%	68%
South Bend, IN	32%	62%
Buffalo, NY	24%	50%

*Among those who have ever visited respective destination
Base: Total Markets

INTENT TO VISIT IN NEXT 12 MONTHS



51% of respondents intend to visit Green Bay, WI during the next 12 months.

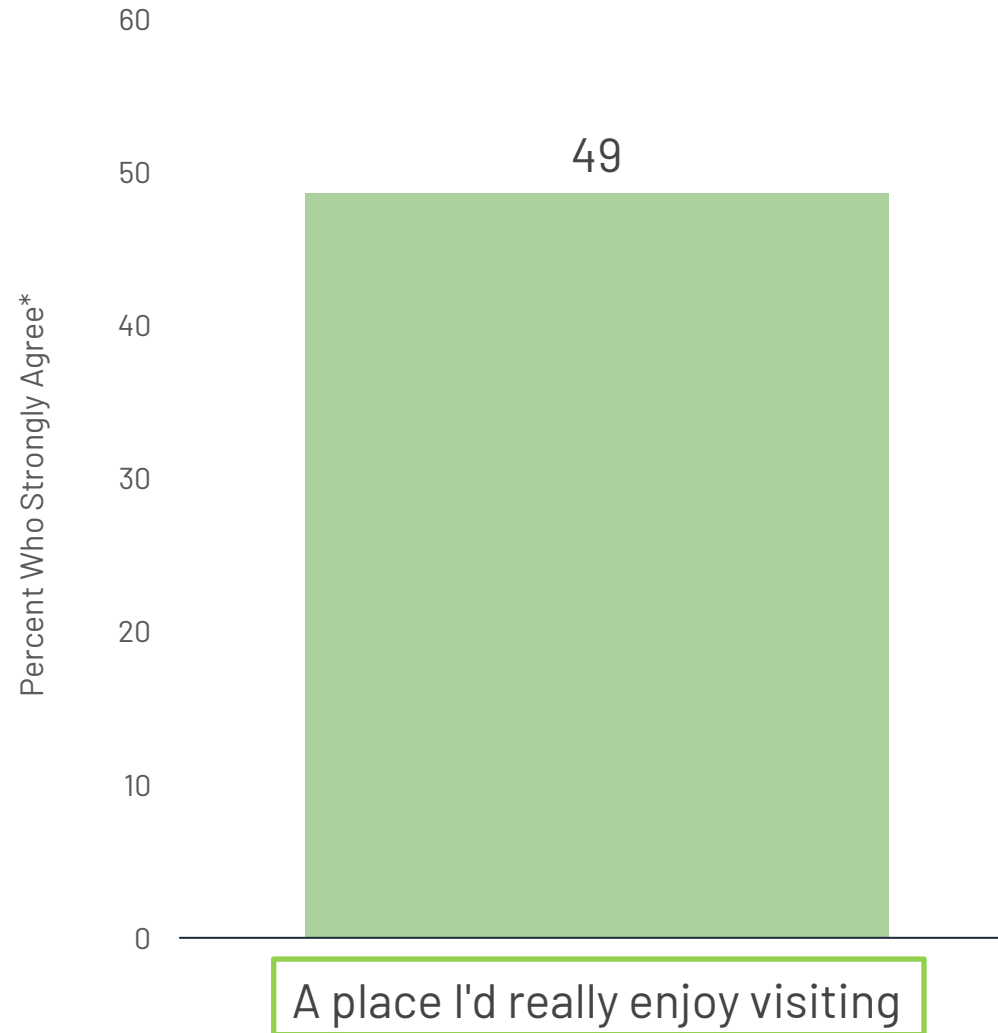
	Probably or Definitely Will Visit Destination in Next 12 Months*
Green Bay, WI	51%
South Bend, IN	27%
Buffalo, NY	26%

*On a day or overnight trip
Base: Total Markets

[IMAGE OVERVIEW]

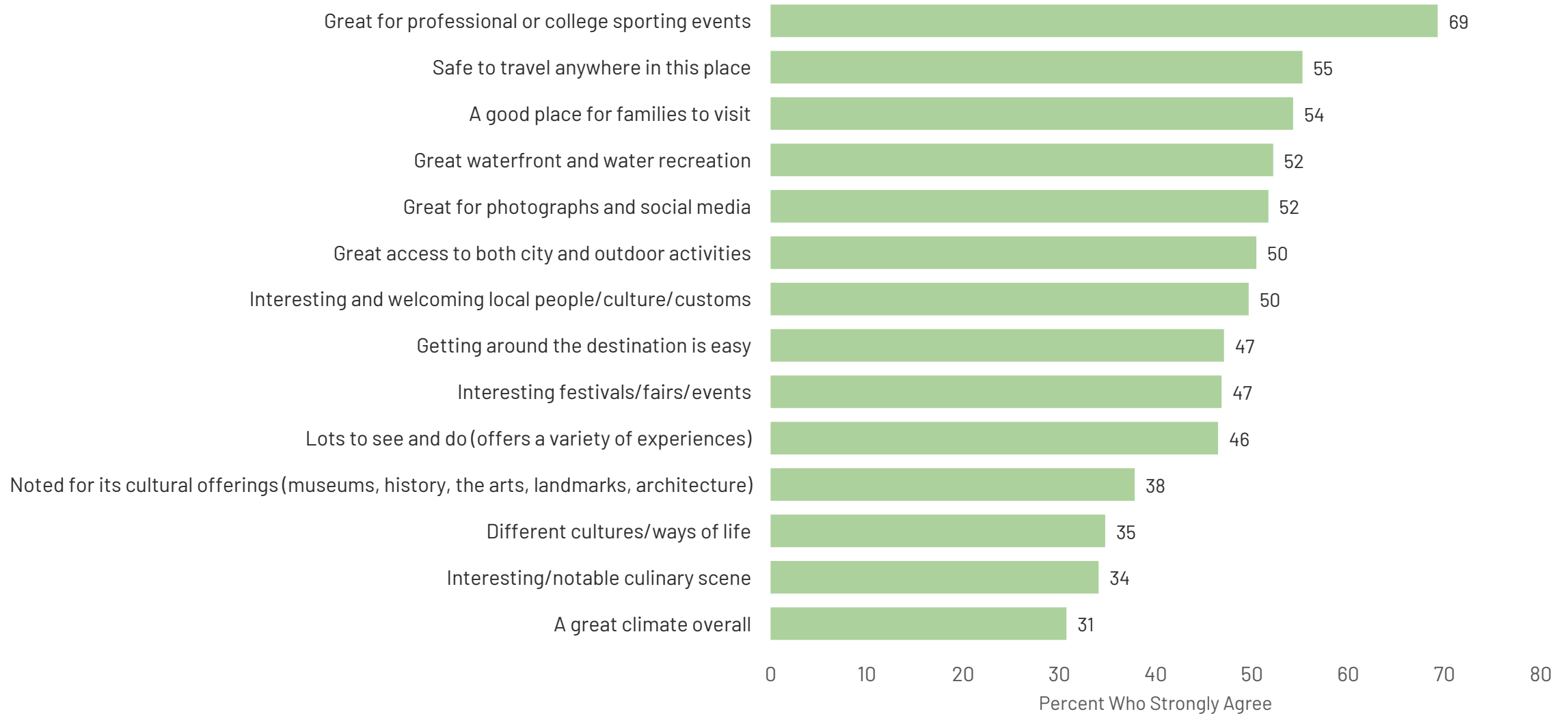


GREEN BAY'S OVERALL IMAGE



*"Percent who strongly agree" is the percent of respondents giving a statement an agree/disagree rating of 8, 9 or 10 out of 10
Base: Total Markets

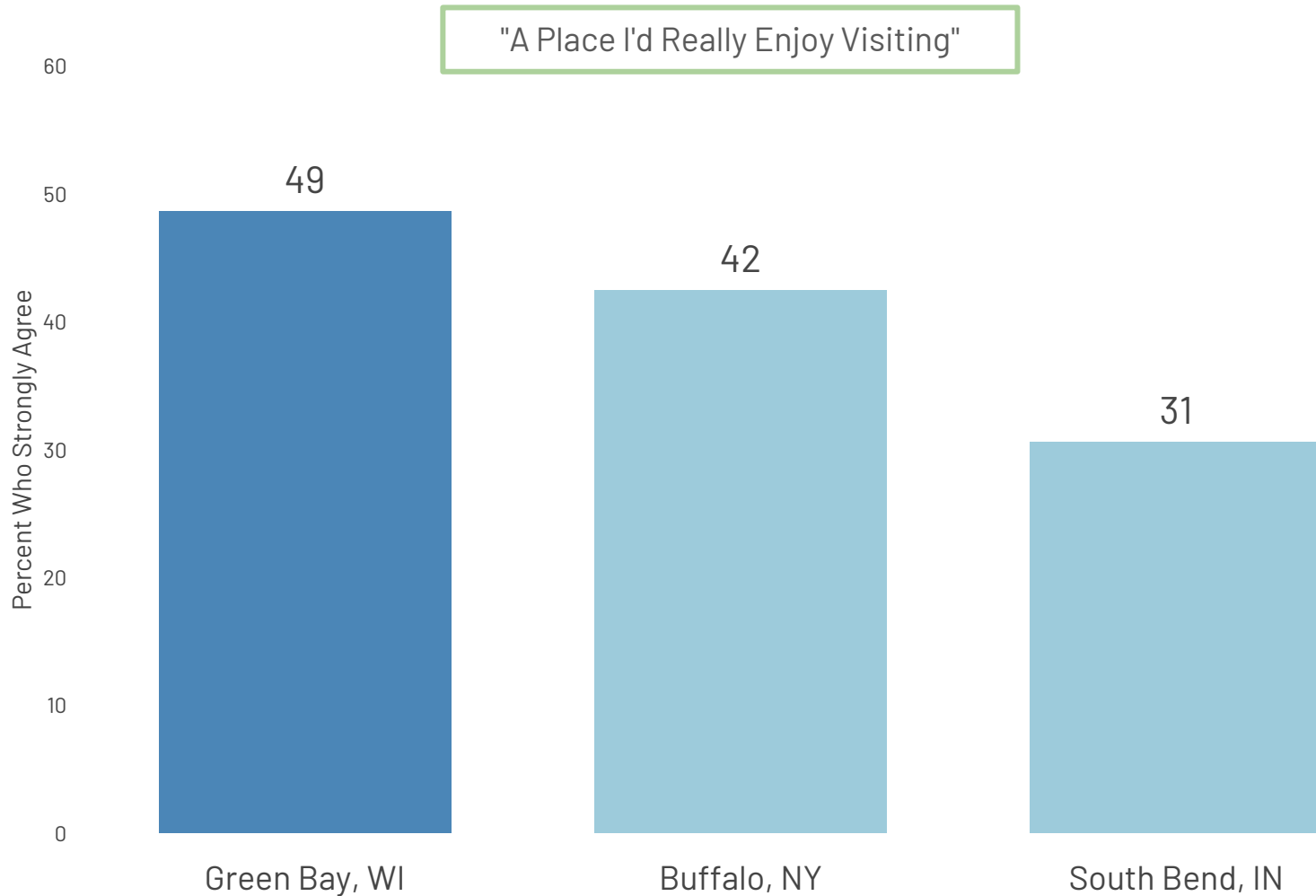
GREEN BAY: DESTINATION IMAGE



[IMAGE VS. THE COMPETITION]



OVERALL IMAGE VS. COMPETITION



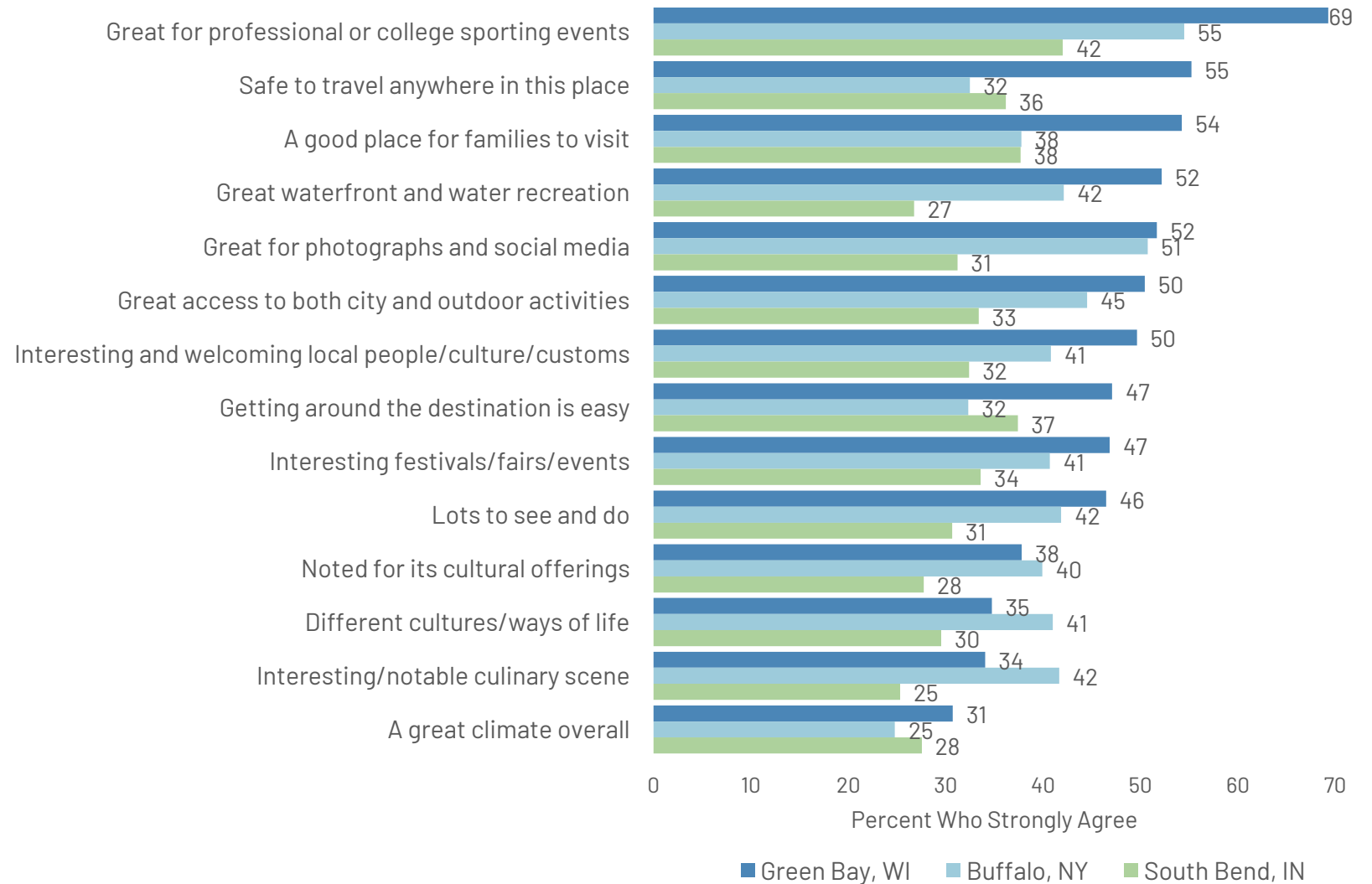
Relative to the other destinations in the competitive set for this study, Green Bay is the leader in its overall image among key advertising market travelers.

Across the key advertising markets surveyed, about half rated Green Bay very favorably as a destination they "would really enjoy visiting." Green Bay performs at the top of its entire competitive set above Buffalo, NY (42%), and South Bend, IN (31%).

OVERALL IMAGE VS. COMPETITION

Green Bay is ahead of its competitive set and performs significantly higher in nine of the fourteen destination attributes/perceptions that were included in the study. The five attributes/perceptions where Green Bay is either tied or behind its competitors are:

- *Great for photographs and social media*
- *Noted for its cultural offerings*
- *Different cultures/ways of life*
- *Interesting/notable culinary scene*
- *A great climate overall*





"HALO EFFECT" ON ECONOMIC DEVELOPMENT



THE "HALO EFFECT"

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.

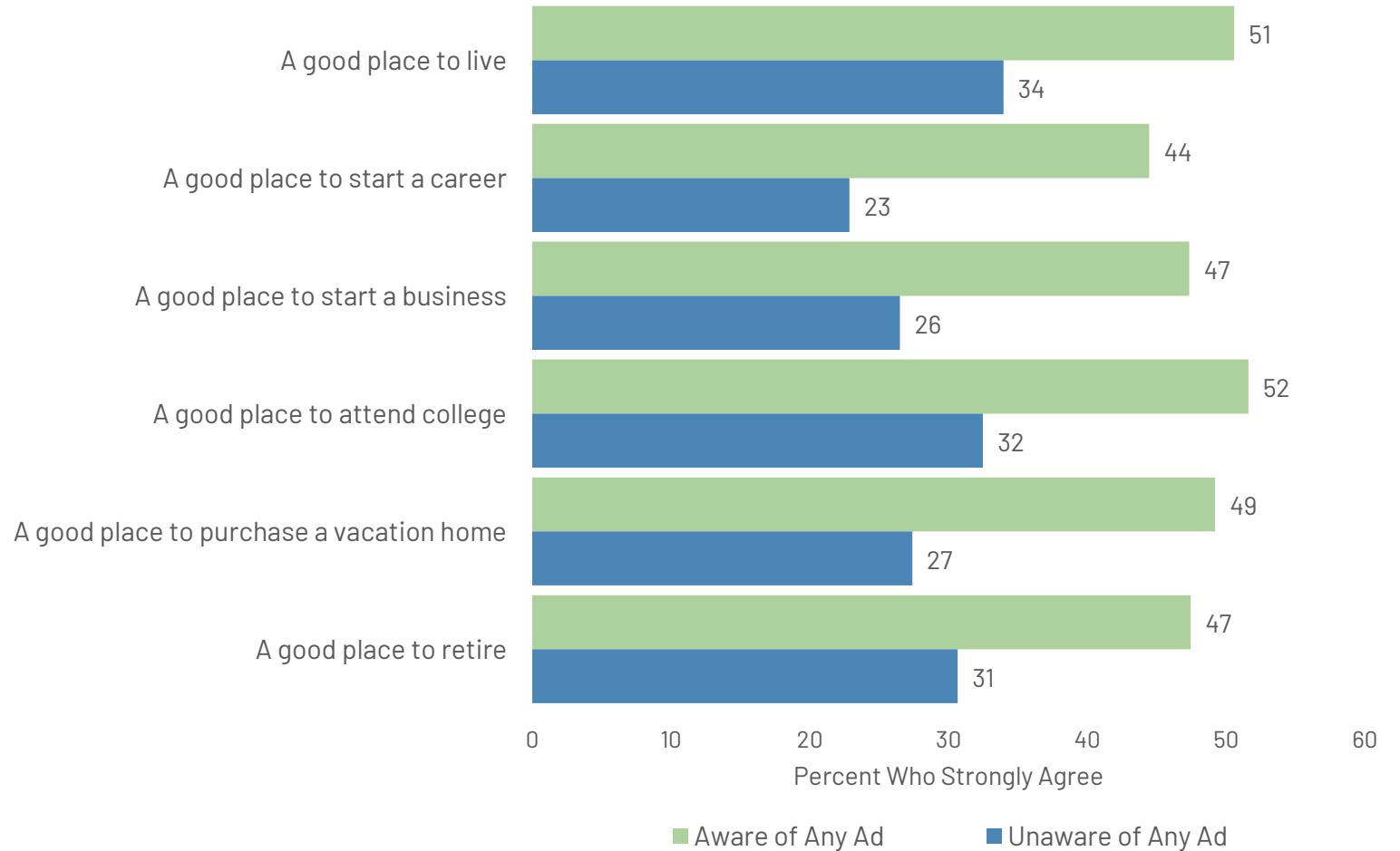
Applying the psychological concept of the **"halo effect"** to tourism promotion advertising, Longwoods set out to determine if gains in image for Green Bay from its tourism advertising would extend beyond the appeal as a place to visit. Could it be that **economic objectives could also be achieved**, such as viewing Green Bay more favorably as a place to live, work, start a business, attend college, purchase a vacation home and retire?



IMPACT OF TOURISM AD AWARENESS ON ECONOMIC DEVELOPMENT IMAGE

In the first Halo Effect data analysis, Longwoods compared the percentage of key advertising market travelers aware of Discover Green Bay's advertising, who strongly agreed with each of the economic development variables, to travelers that were unaware of the campaign.

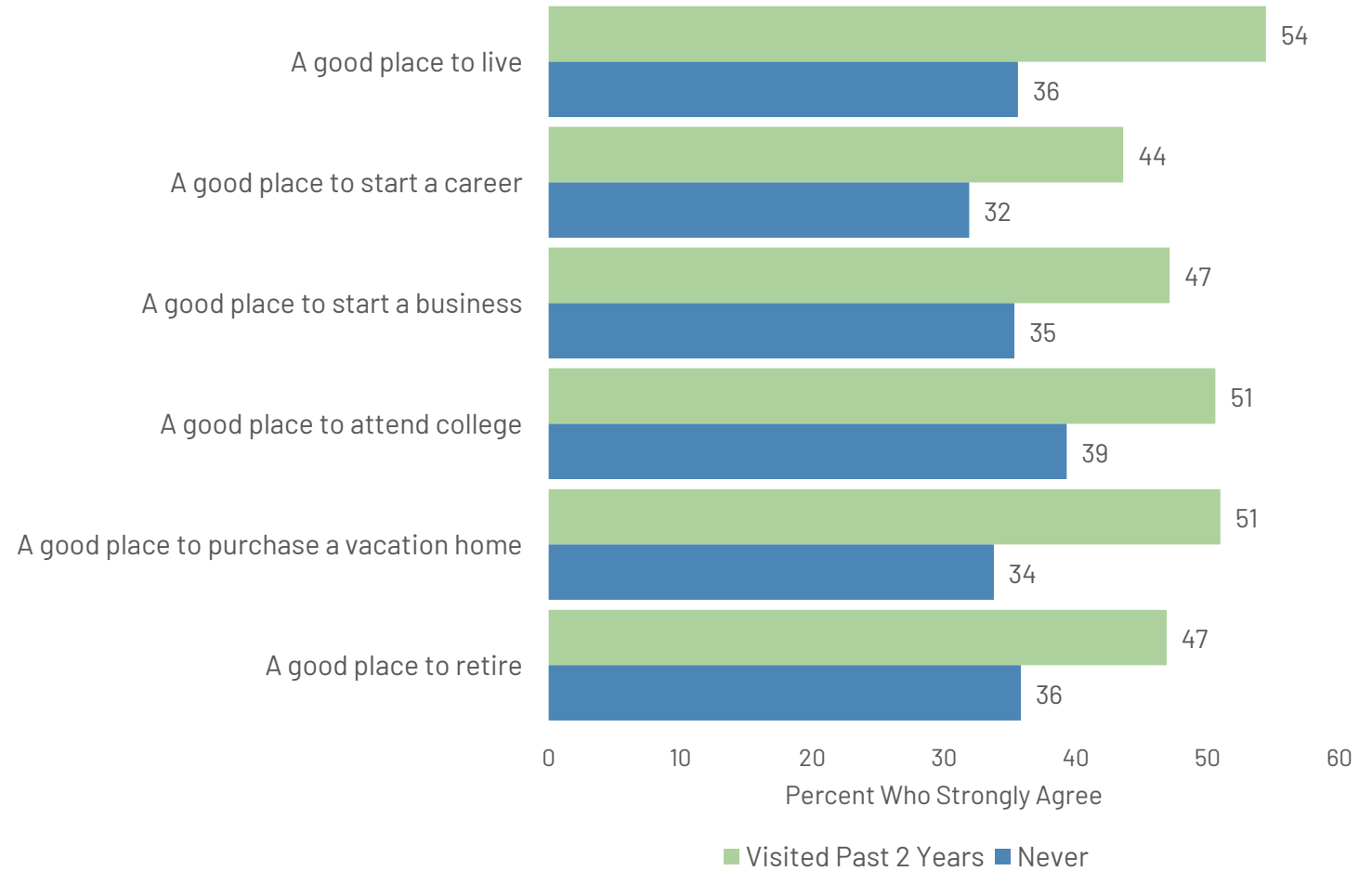
Those who saw the advertising rated Green Bay higher on all the economic development indicators.



IMPACT OF VISITATION ON ECONOMIC DEVELOPMENT IMAGE

Next, Longwoods compared the percentage of key advertising market travelers who have visited the city recently to those who have never visited.

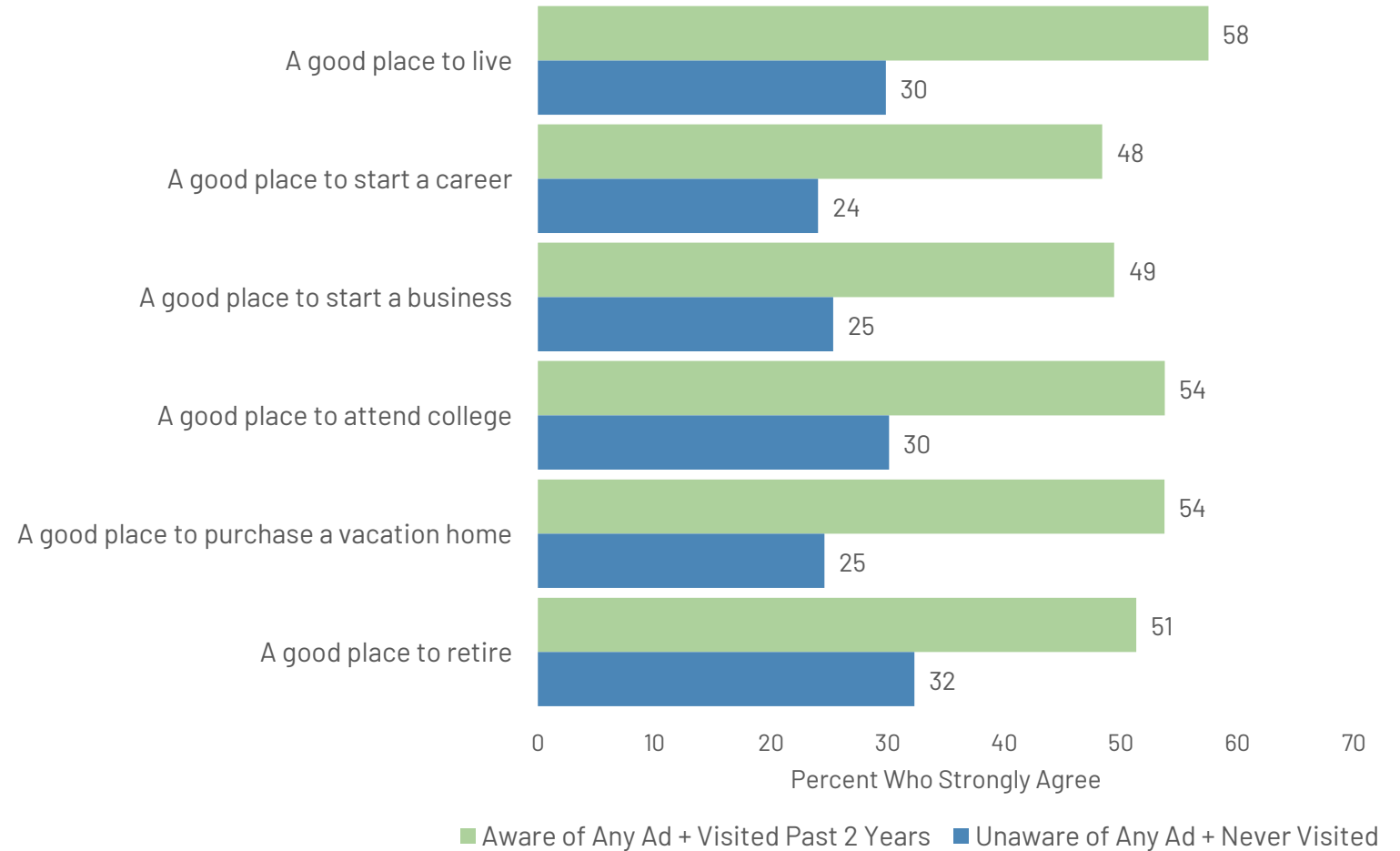
Key advertising market travelers who visited Green Bay during the past two years also consistently rated Green Bay higher than those who have never visited.



IMPACT OF AD AWARENESS + VISITATION ON ECONOMIC DEVELOPMENT IMAGE

In the final Halo analysis, Longwoods compared the strongly agree results of key advertising market travelers who were both aware of Discover Green Bay's advertising and have visited in the past 2 years to those who were unaware of the campaign and have never visited.

For each economic development objective, the most dramatic improvement in image was among those key advertising market travelers who were both exposed to the advertising campaign message and who also visited Green Bay.



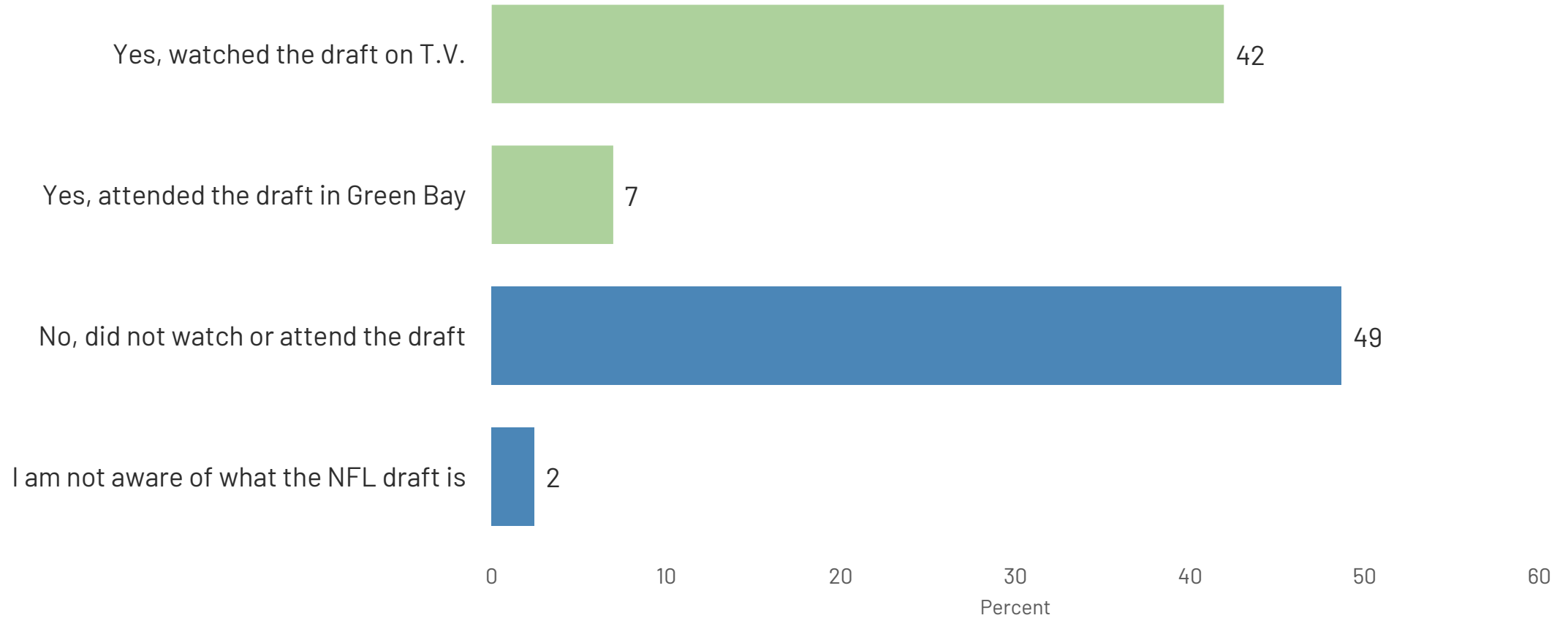


NFL DRAFT

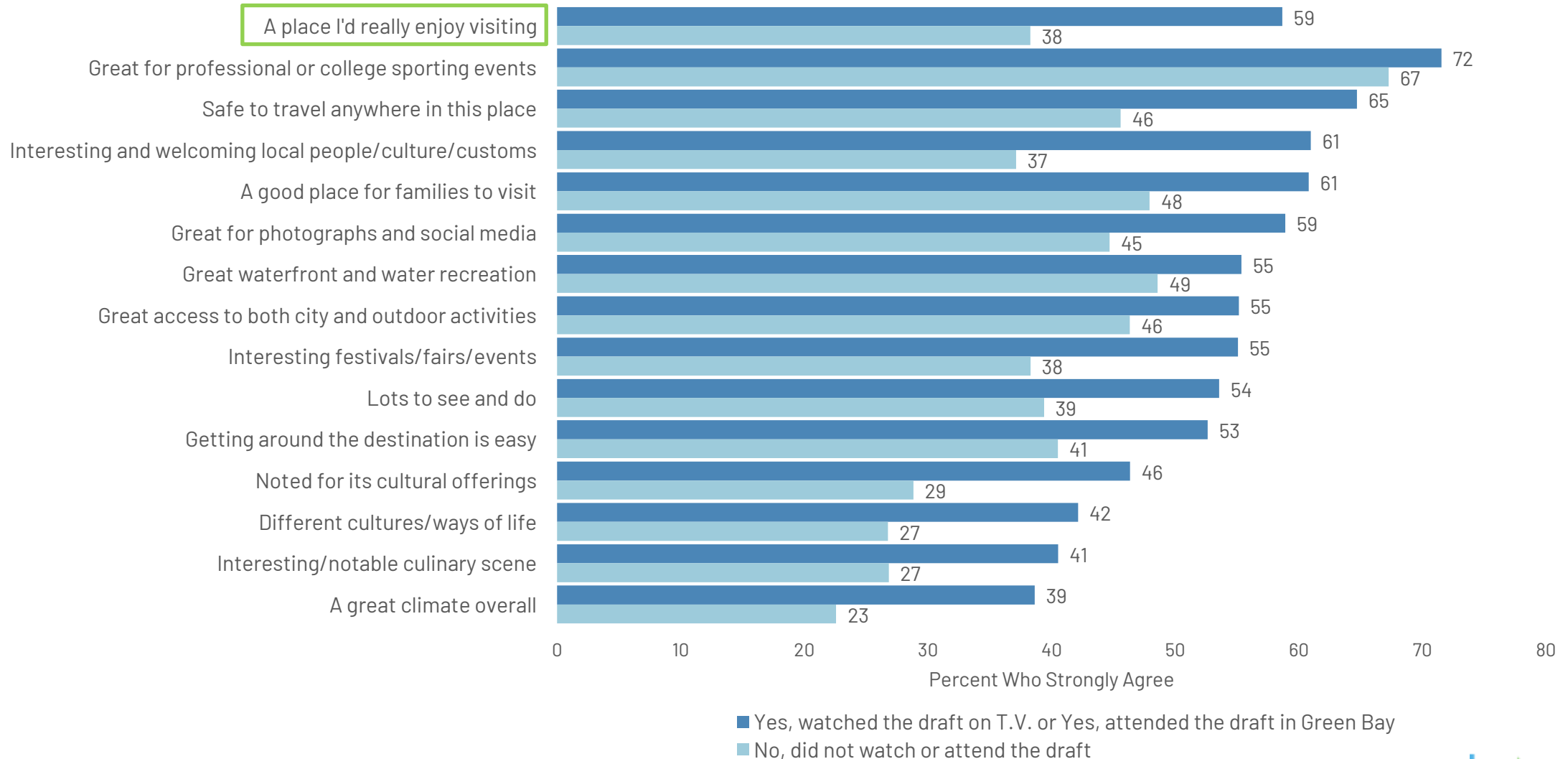


DID YOU WATCH OR ATTEND THE NFL DRAFT?

Did you watch or attend the 2025 NFL Draft that was held in Green Bay, WI?



DESTINATION IMAGE: NFL DRAFT IMPACTS



IMPACT OF 2025 NFL DRAFT ON ECONOMIC DEVELOPMENT IMAGE

