



# Fall 2025 Travel Indicators

Data available as of January 12, 2025



# Minnesota fall travel indicators

Explore Minnesota (EMN) regularly reviews and analyzes travel indicators to better understand tourism industry trends and health.

- This report is focused on state-level fall season trends from September to November 2025. See our [Industry News enewsletter](#) for a monthly lodging performance summary with state and Minnesota tourism region-level data.

Additionally, find more [research](#) on our industry website.

# Key findings

Minnesota and national travel indicators continue to offer a mixed perspective on the travel industry's health. For the fall season, slight year-over-year increases were observed in state hotel and employment metrics. However, MSP air travel decreased relative to last fall and Canada/Minnesota inbound arrivals are still down 18% year-to-date through November 2025.

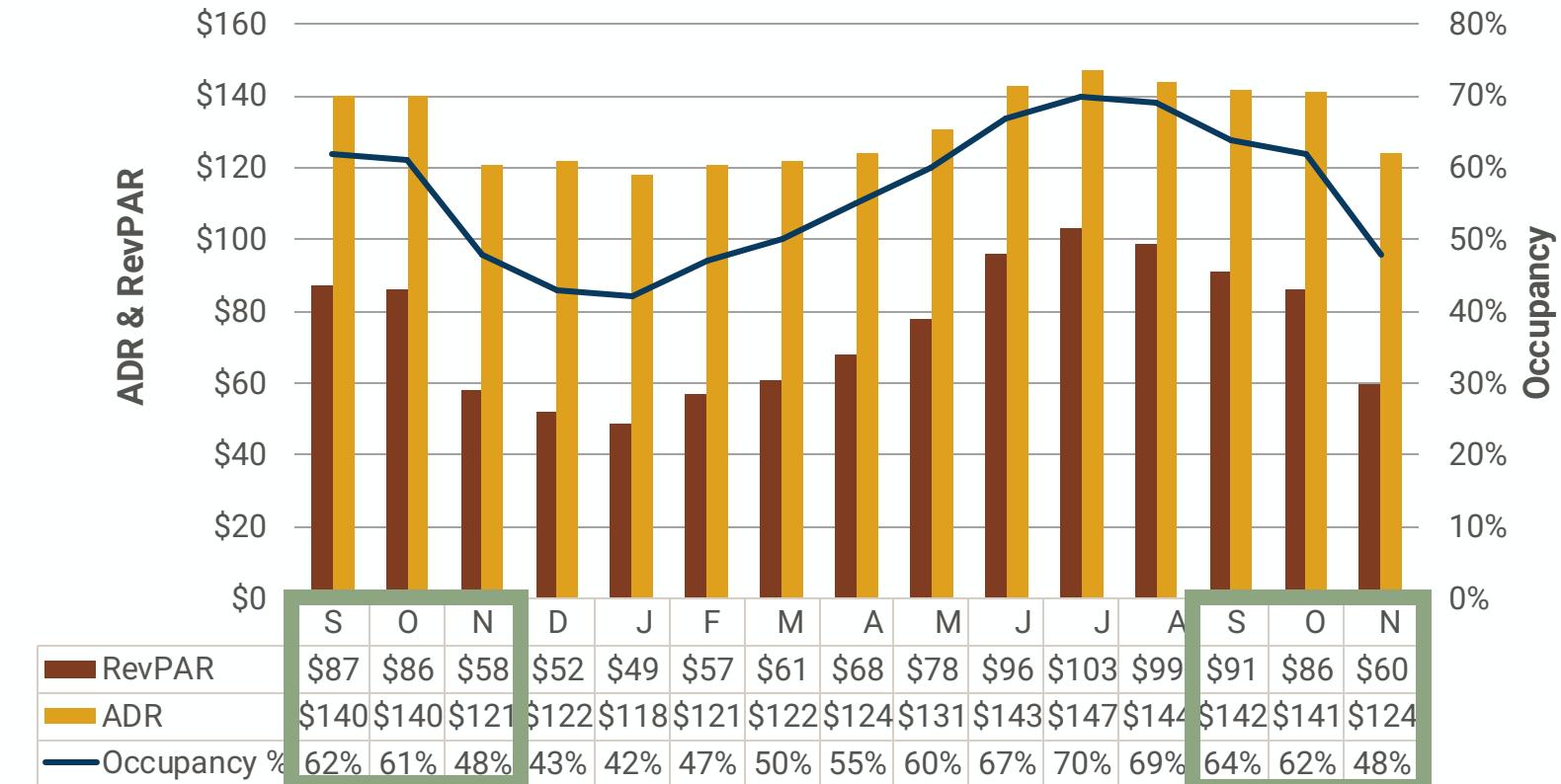
- **Accommodations** – Minnesota's monthly hotel key performance metrics increased slightly or remained flat in fall 2025 compared to 2024. As expected, metrics were strongest in September and weakest in November. Monthly occupancy percentage ranged from 64% to 48%, monthly ADR ranged from \$142 to \$124, and monthly RevPAR ranged from \$91 to \$60.
- **L&H employment** – Minnesota's Leisure & Hospitality (L&H) industry employment increased .6% for fall 2025 relative to 2024. Employment ranged from a monthly high of 282k in September to monthly low of 267k in November.
- **Air travel** – Minneapolis-Saint Paul Airport (MSP) airport had 8.5 million passengers during the fall travel season. This is a 2.8% less, or a 243k decrease from fall 2024.
- **Canadian visitation** – This fall, monthly Canadian travel to Minnesota was down 16 to 19% from the same months in 2024.

In September, October and November 2025, lodging performance metrics improved or were flat compared to the same period in 2024.

- Following expected fall season trends, all three key metrics were highest in September and lowest in November.
  - Occupancy ranged from 64 to 48%
  - ADR ranged from \$142 to \$124
  - Fall RevPAR ranged from \$91 to \$60

# Minnesota's fall hotel metrics up slightly

Minnesota Hotel Metrics Over Time  
September 2024 – November 2025



Source: CoStar/STR Dashboard

2025 Minnesota hotel key performance metrics vary across the state and remain below total U.S. averages.

- **Northeastern MN** – Highest regional ADR (\$153.44) and RevPAR (\$81.89)
- **Central MN** – Second-highest regional ADR (\$137.73) and lowest occupancy (51%)
- **Northwestern MN** – Second-lowest region for all three key hotel performance metrics
- **Southern MN** – All three metrics increased 1.6 to 3.6% in 2025 compared to 2024
- **Metro MN** – Highest regional occupancy (59.2%)

# Mixed 2025 year-to-date hotel metrics for the state & MN Tourism Regions

State & Tourism Region Hotel Metrics - 2025 Year to Date - November						
Geography	Occupancy		ADR		RevPAR	
	2025	YoY % Change	2025	YoY % Change	2025	YoY % Change
Total U.S.	63.2%	-1.2%	\$160.70	.9%	\$101.49	-.3%
<b>State of MN</b>	57.5%	1.3%	\$134.40	-.1%	\$77.24	1.2%
Northeastern MN	53.4%	-2.7%	\$153.44	1.9%	\$81.89	-.9%
Central MN	51%	.5%	\$137.73	.9%	\$70.30	1.5%
Northwestern MN	51.7%	-.5%	\$120.29	.5%	\$62.18	.1%
Southern MN	53.4%	1.6%	\$120.11	1.9%	\$64.11	3.6%
<b>Metro MN</b>	59.2%	2.2%	\$135.35	-1.5%	\$80.17	-.7%

Source: CoStar/STR Dashboard; See appendix for MN Tourism Region definitions

In fall 2025, Minnesota's L&H industry employed 282k to 267k people per month.

- In September and November 2025, L&H employment was higher than in the same months of 2024.
- In October 2025, L&H employment was lower than October 2024.

# Minnesota's fall L&H employment increased .6% YoY



Source: Minnesota Department of Employment & Economic Development (DEED)

Between September and November, 8.5 million passengers passed through MSP airport. This is a 2.8% or 243k drop from the same three-month period in 2024.

# MSP airport passengers decreased 2.8% in fall 2025

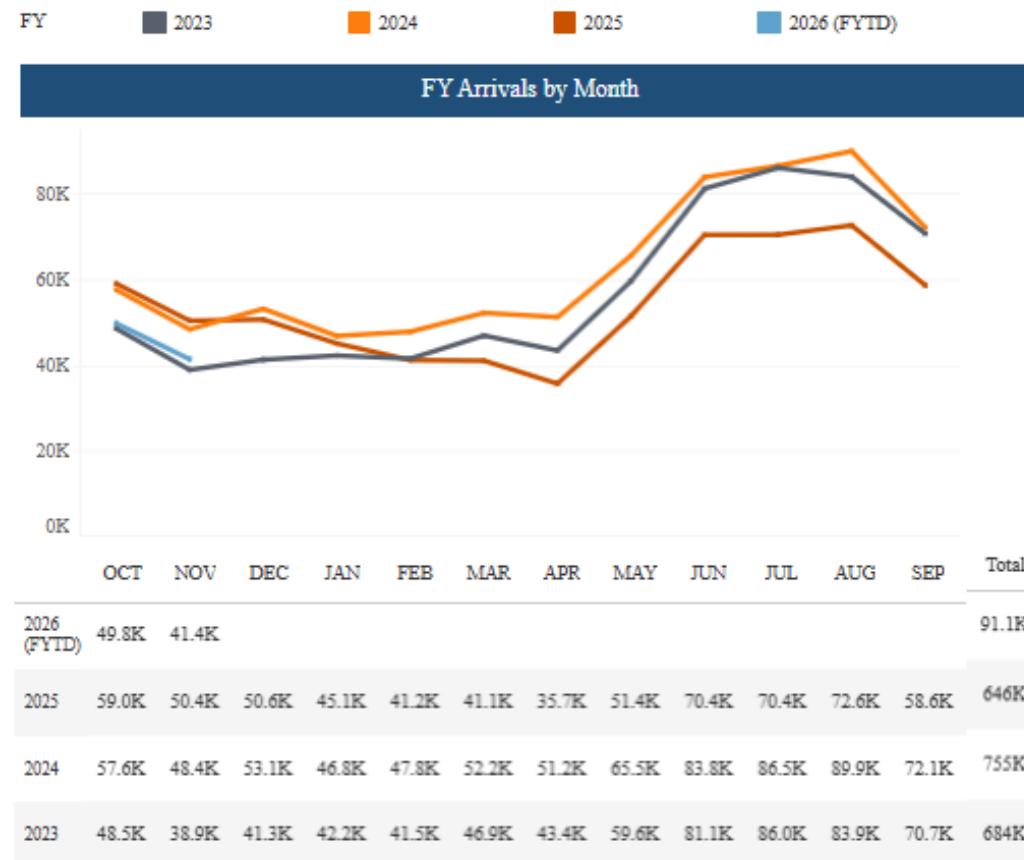


Source: Minneapolis Saint Paul Metropolitan Airports Commission

Canadian travel into Minnesota has decreased 18% in 2025 year-to-date through November compared to the same period in 2024.

- January -4% year-over-year (YoY)
- February -14% YoY
- March -21% YoY
- April -30% YoY
- May -22% YoY
- June -16% YoY
- July -19% YoY
- August -19% YoY
- September -19 YoY
- October -16% YoY
- November -18% YoY

# Fall monthly Canadian arrivals to Minnesota down 16 to 19%



Source: U.S. Customs & Border Protection



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# Lodging performance definitions

**Occupancy percentage** – Rooms sold divided by rooms available multiplied by 100. Occupancy is always expressed as a percentage of rooms occupied.

**Annual Daily Rate (ADR)** – Room revenue divided by rooms sold, displayed as the average rate for a single room.

**Revenue Per Available Room (RevPAR)** – Total room revenue generated from the sale or rental of rooms.

**Geography** – The five Minnesota Tourism Regions are defined as shown in the map to the left.