



EXPLORE **m** MINNESOTA

# Spring/Summer 2025 Travel Indicators

Data available as of October 3, 2025





# Minnesota spring/summer 2025 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 spring/summer season trends from April to August 2025, and provides 2024 visitation and tourism economic impact numbers.

See our [Industry News enewsletter](#) for a monthly lodging performance summary with state and Minnesota tourism region-level data.

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

# Key findings - 2025

Minnesota and national spring/summer 2025 and year-to-date lodging, jobs and air travel trends are more down than up. Decreases are related to economic challenges impacting leisure traveler behavior and negative Canadian sentiment towards the U.S.

- **Accommodations** – Year-to-date 2025 hotel key performance metrics vary across the state and remain below total U.S. averages. For the spring/summer season, Minnesota's average monthly occupancy percentage was 64%, ADR was \$138 and RevPAR was \$89.
- **L&H employment** – Between April and August 2025, Minnesota's Leisure & Hospitality (L&H) industry employed a monthly average of 284k people, which is similar to 2024.
- **Air travel** – Minneapolis-Saint Paul Airport (MSP) airport had 16.5 million passengers during the spring/summer season. This is a 2.8%, or almost 500k decrease from 2024.
- **Tourism business sentiment** – According to a recent EMN sentiment survey, during the spring/summer 2025 season, business activity was down for 51% of Minnesota tourism participating businesses, up for 30% and similar to 2024 for 21%.
- **Canadian & overseas visitation** – For 2025 through August, Canadian arrivals to Minnesota are down 18% compared to 2024. According to a 2025 forecast, experts anticipate a 4% decrease in year-over-year (YoY) overseas visitation to Minnesota.

# Key findings - 2024

Minnesota's tourism economy was strong in 2024 with a 1.7% year-over-year (YoY) increase in visitation and a 4.3% increase in visitor spending.

- **2024 visitation** – Minnesota's visitor volume increased to 81.6 million. Visitors include Minnesota residents and non-residents who travel 50 miles or more for a day (60%) or an overnight (40%) trip.
- **2024 visitor economy impact** – Tourism had a direct economic impact of \$14.7 billion and a total economic impact of \$24.7 billion on the state. Visitor spending saved each Minnesota household \$1,031 in state and local taxes.





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# Minnesota travel

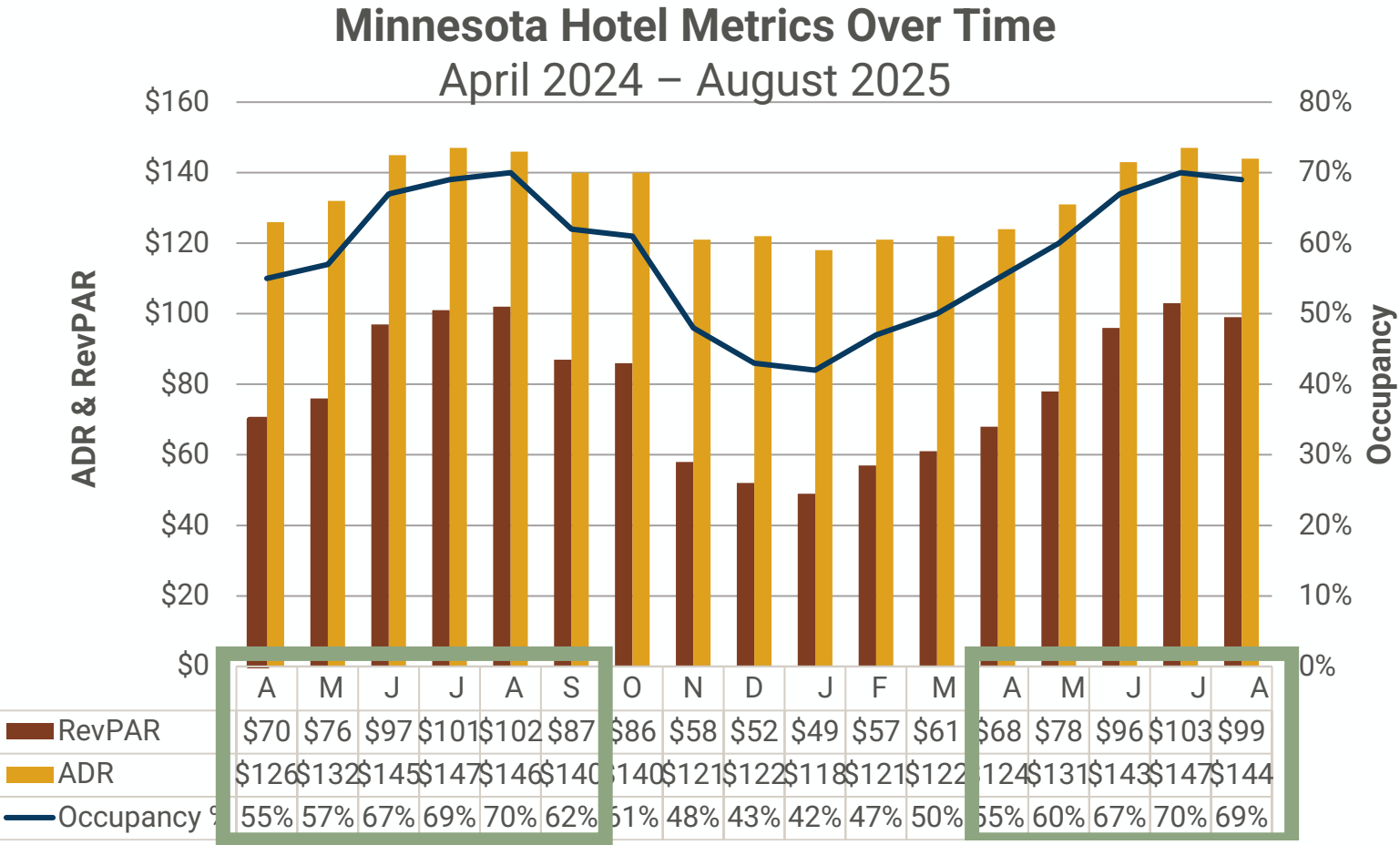
Accommodations, L&H employment, air travel and tourism business sentiment



April to August 2025 hotel lodging performance metrics varied compared to the same period in 2024, and are in-line with national trends.

- For the five spring/summer months, average monthly occupancy was stable at 64%.
- Average monthly ADR decreased from \$139 to \$138.
- Average monthly RevPAR stable at \$89.
- All three key hotel metrics were lowest in April and highest in July.

# Mixed Minnesota hotel metrics for spring/summer season



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 (\$150.16) and RevPAR (\$81.72)
- **Central MN** – Second-highest regional ADR (\$137.20) and lowest occupancy (51.5%)
- **Northwestern MN** – Largest YoY regional decrease with a 3.7% YoY occupancy decline to 51.5%
- **Southern MN** – All three key hotel performance metrics increased .8 to 2.8% YoY
- **Metro MN** – Highest regional occupancy (58.9%).

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

State & Tourism Region Hotel Metrics - 2025 Year to Date - August						
Geography	Occupancy		ADR		RevPAR	
	2025	YoY % Change	2025	YoY % Change	2025	YoY % Change
Total U.S.	63.4%	-0.8%	\$160.17	1%	\$101.61	0.2%
State of MN	57.5%	1.3%	\$133.26	-0.8%	\$76.62	.5%
Northeastern MN	54.4%	-1.1%	\$150.16	0.9%	\$81.72	-.2%
Central MN	51.1%	-.7%	\$137.20	2.1%	\$70.11	1.4%
Northwestern MN	51.5%	-3.7%	\$120.51	1.1%	\$62.04	-2.7%
Southern MN	52.8%	.8%	\$120.16	2%	\$63.49	2.8%
Metro MN	58.9%	1.3%	\$134.01	-1.4%	\$78.93	-.2%

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

Between April and August, Minnesota's L&H industry employed an average of 284k people.

- In April and June 2025, L&H employment was higher than in the same months of 2024.
- In the other three months of the spring/summer 2025 season, employment was lower than in 2024.
- For comparison, according to the U.S. Travel Association, national L&H employment is up 1% year-to-date.

# L&H employment flat YoY

**Minnesota L&H Employment Over Time**  
April 2024 – August 2025



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



Between April and August, 16.5 million passengers passed through MSP airport. This is a 2.8% or almost 500k drop from the same five-month period in 2024. This airport decrease is aligned with national trends.

- With 3.6 million passengers, July was the only spring/summer month with more passengers YoY.
- The other four spring/summer months had 2.9 to 3.5 million passengers. These four months saw a decline in passenger volume compared to the same month in 2024.

# MSP airport passengers decreased by 2.8% in spring/summer 2025

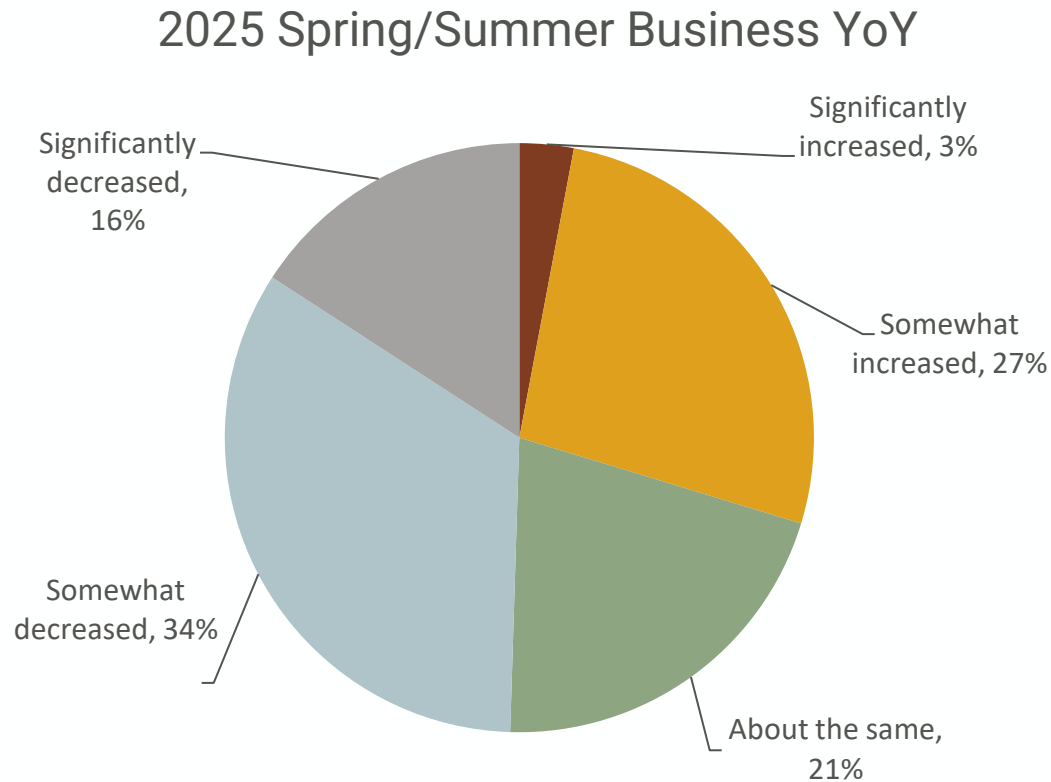


Source: Minneapolis Saint Paul Metropolitan Airports Commission

In a recent Explore Minnesota sentiment survey, state tourism businesses that participated in the survey reported similar business activity trends for the spring/summer season and 2025 overall.

- Half of businesses reported making recent operational and/or marketing adjustments in response to shifting leisure travel trends.
- Increased marketing is the most reported change. Other adjustments include:
  - Allowing customers more booking flexibility
  - Trimming overhead and staff costs
  - Spending more on facility improvements

# During the 2025 spring/summer season, 51% of MN tourism businesses were down, 30% up and 21% reported activity similar to 2024



Source: EMN September 2025 MN Tourism Business Sentiment Survey  
N = 115



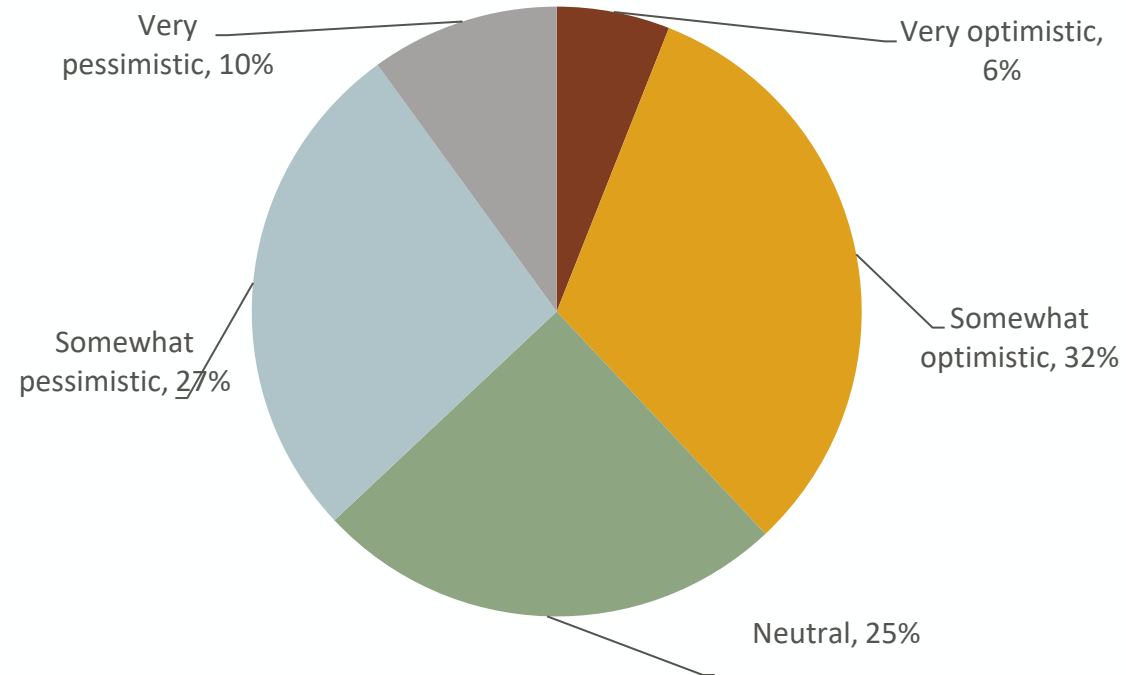
State tourism businesses' outlook for the rest of 2025 varies.

To a survey question asking for leisure travel trends, businesses provided inputs on multiple topics.

- Canadian wildfire smoke is detrimental
- Travelers are feeling economic pressure and spending less
- Events and international visitation travel are beneficial

## For the remainder of the year, 38% of MN tourism businesses are optimistic, 25% are neutral & 37% are pessimistic

Business Outlook for Remainder of 2025



Source: EMN September 2025 MN Tourism Business Sentiment Survey  
N = 115



# Canadian & overseas visitation

Border crossings & international trends



Canadian travel into Minnesota has decreased in 2025 year-to-date relative to 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

# Canadian arrivals to MN down 18% YoY



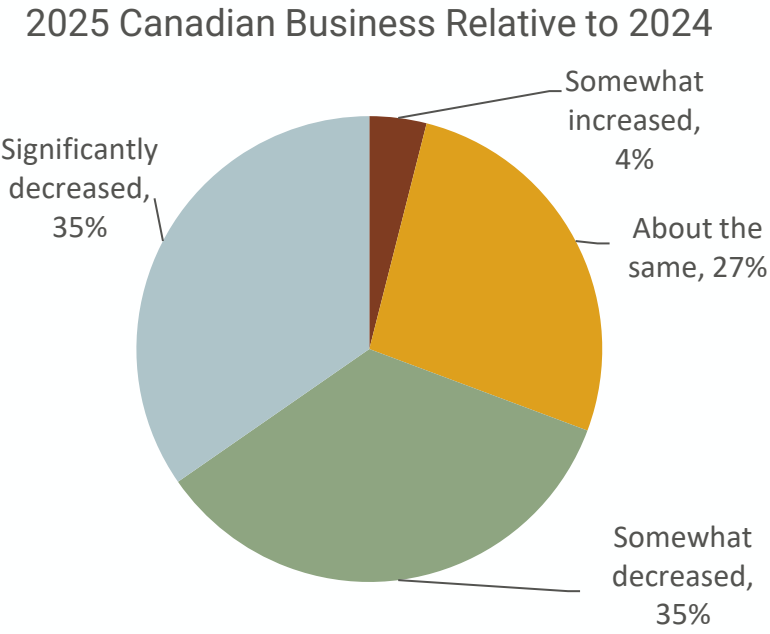
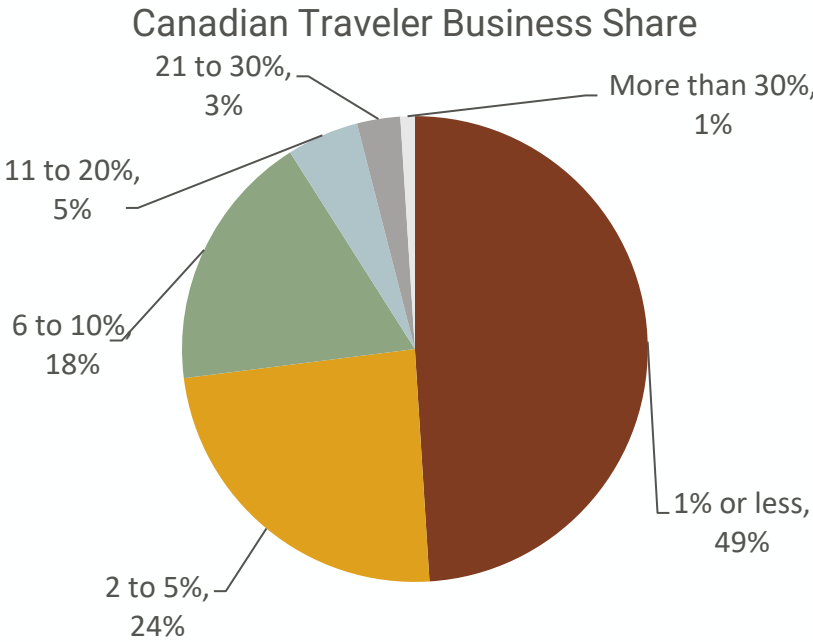
Source: U.S. Customs & Border Protection

Half of survey respondents reported that less than 1% of their visitation is typically from Canadians.

For the other half of businesses, 24% receive 2-5% of activity from Canadians, 18% receive 6-10%, and 9% receive more than 11% of activity from Canadians. Combined, 70% of these more impacted businesses reported decreased business while 27% reported that 2025 business is like 2024.

In survey comments, a respondent explained that Canadians are still coming however, instead of weekend trips they are taking day trips.

# In recent survey, many MN tourism businesses reported less Canadian visitation & spend



Source: EMN September 2025 MN Tourism Business Sentiment Survey  
Business Share N = 115 & Business YoY N = 55

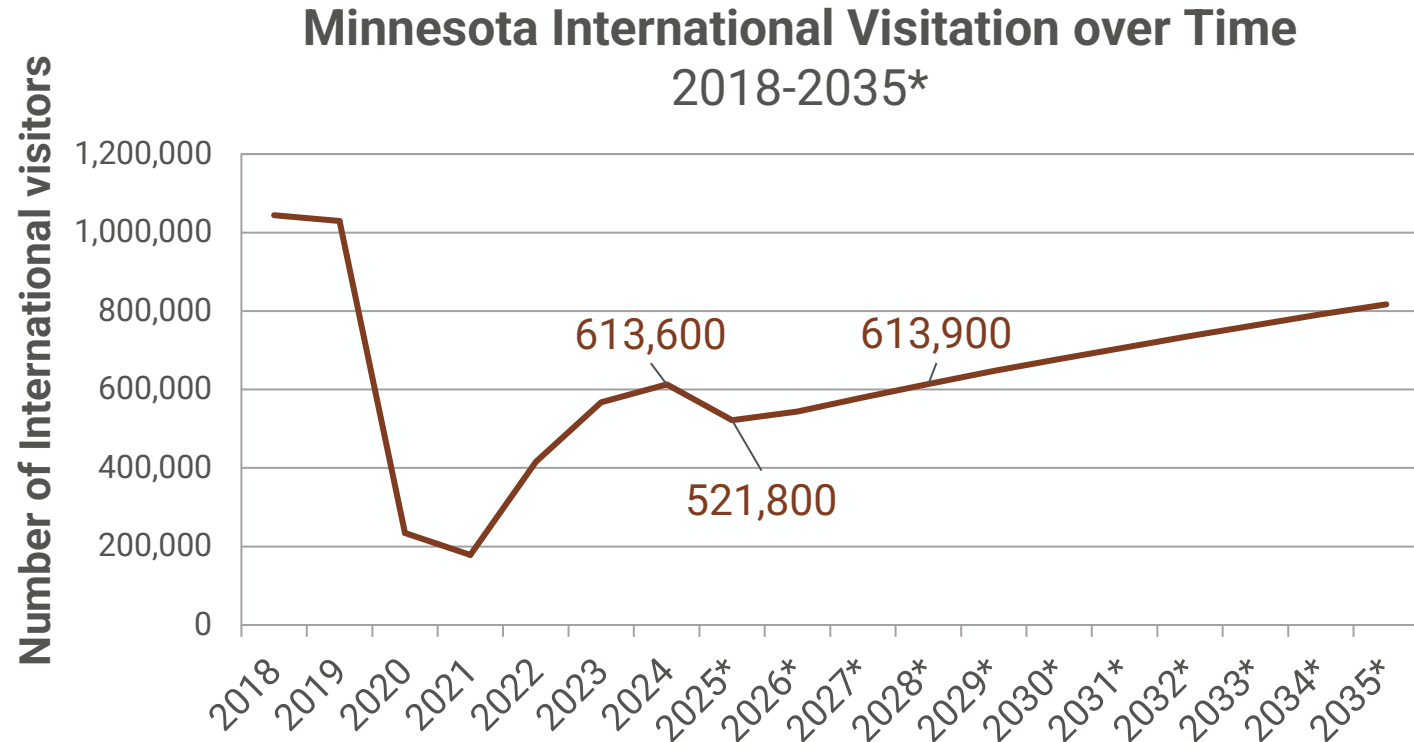


According to Tourism Economics – International States Travel (IST)’s final estimate, Minnesota received 613,600,400 international visitors in 2024. These travelers spent approximately \$586 million in our state.

For 2025, IST forecasts a 15% decrease in YoY international visitation to Minnesota relative to 2024.

This change is driven by an estimated 24% decrease in Canadian visitation and a 4% decrease in overseas visitation.

# 2025 international arrivals forecast to decrease 15% to 522k



\* Forecasted data

Source: Tourism Economics-International States Travel

In 2024 Canada accounted for 55% of Minnesota's international visitation, with 336k visitors.

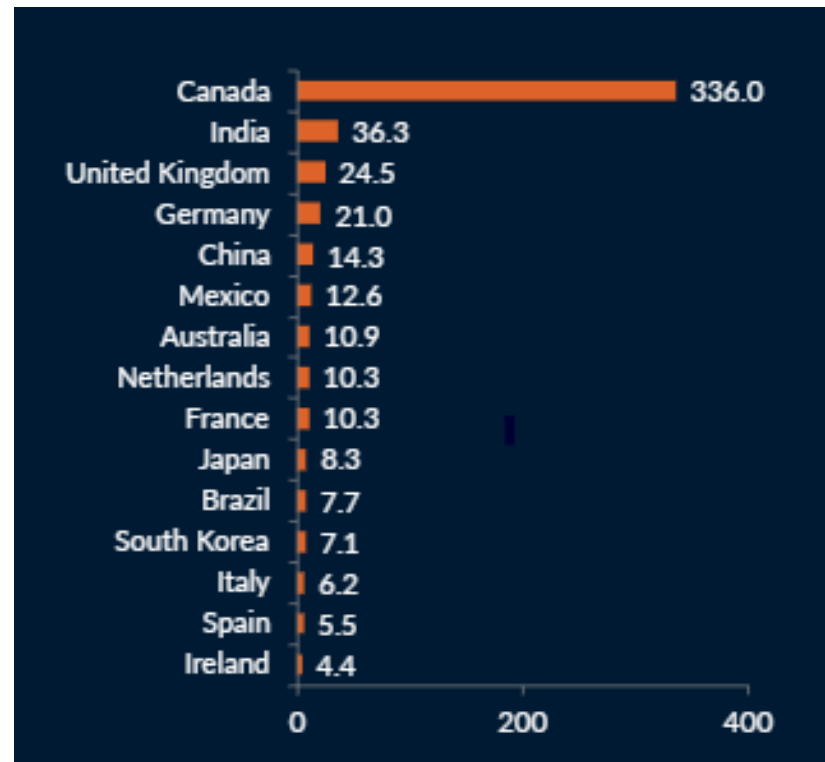
India continued as the number two Minnesota visitor origin market with an estimated 26,300 visitors in 2024.

The United Kingdom, Germany and China are the other top three countries for MN 2024 visitation.

In 2025 EMN will continue to monitor origin market trend shifts due to international sentiment and economic trends.

# Canada, India and the U.K were MN's top international origin markets in 2024

Minnesota Top Origin Market Visitation







# 2024 Visitor Economy Economic Impact

Explore Minnesota partners with Tourism Economics to quantify the economic impact of the visitor economy through a comprehensive model.

Go to the [Tourism & the Economy page](#) of our Industry website for detailed 2024 state visitor economy sales, taxes and employment data.

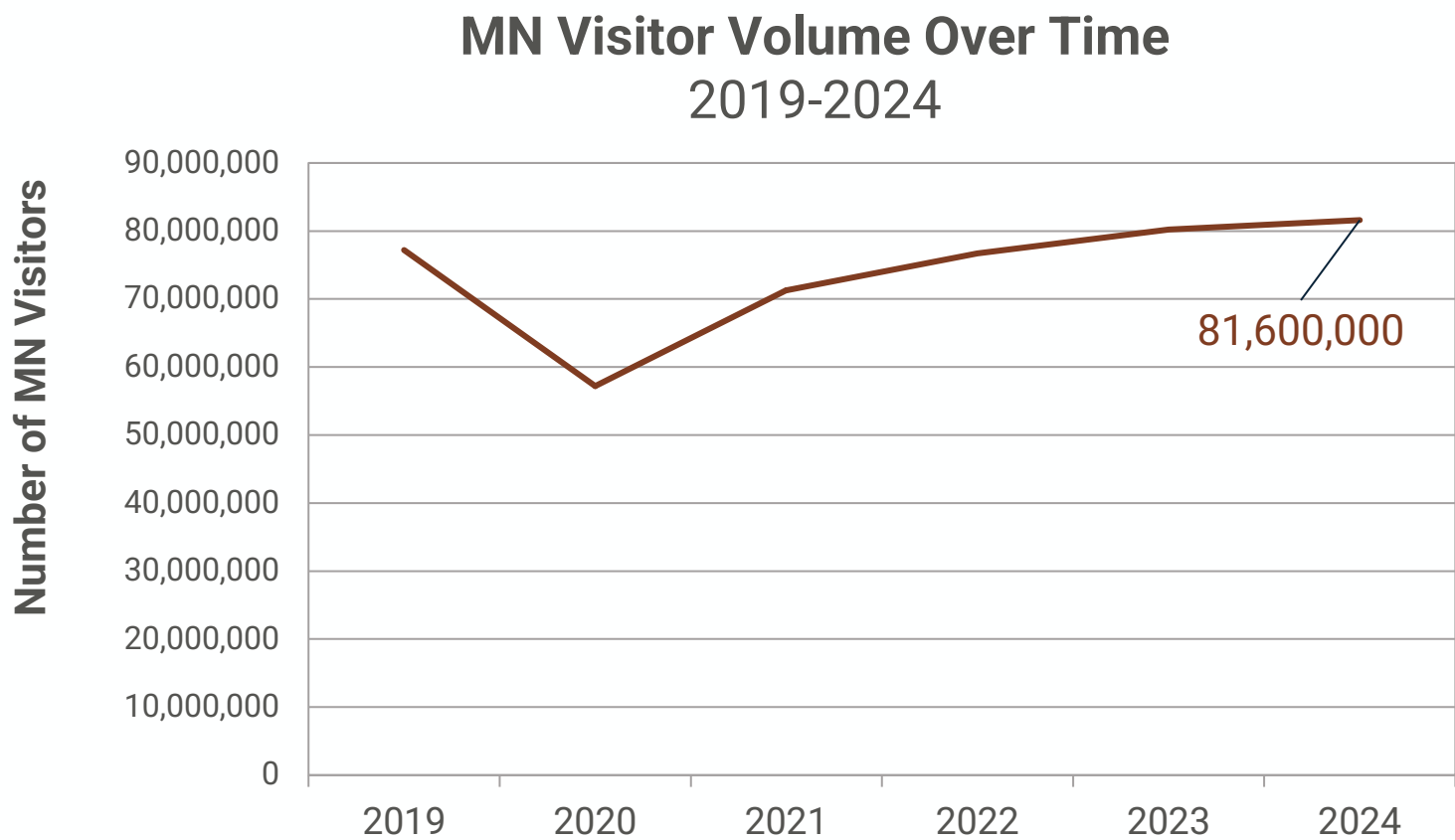
In the coming months, 2024 county-level economic impact data will be shared.

Minnesota visitors include residents and non-residents who travel 50 miles or more for a day (60%) or an overnight (40%) trip. In 2024, residents comprised 37% of MN overnight visitation and 59% of day visitation.

**Additional MN visitor trends**

- Adults 79% & children 21%
- Seasonality: 22% in Q1, 25% in Q2, 29% in Q3 & 23% in Q4
- Trip purpose: leisure 79%, business 8% & business-leisure 4%
- Overnight trips: 3.3 avg nights
- Trip party size: 2.1 adults & .6 children
- Leisure trip spend per person: \$238 overnight & \$82 day trip

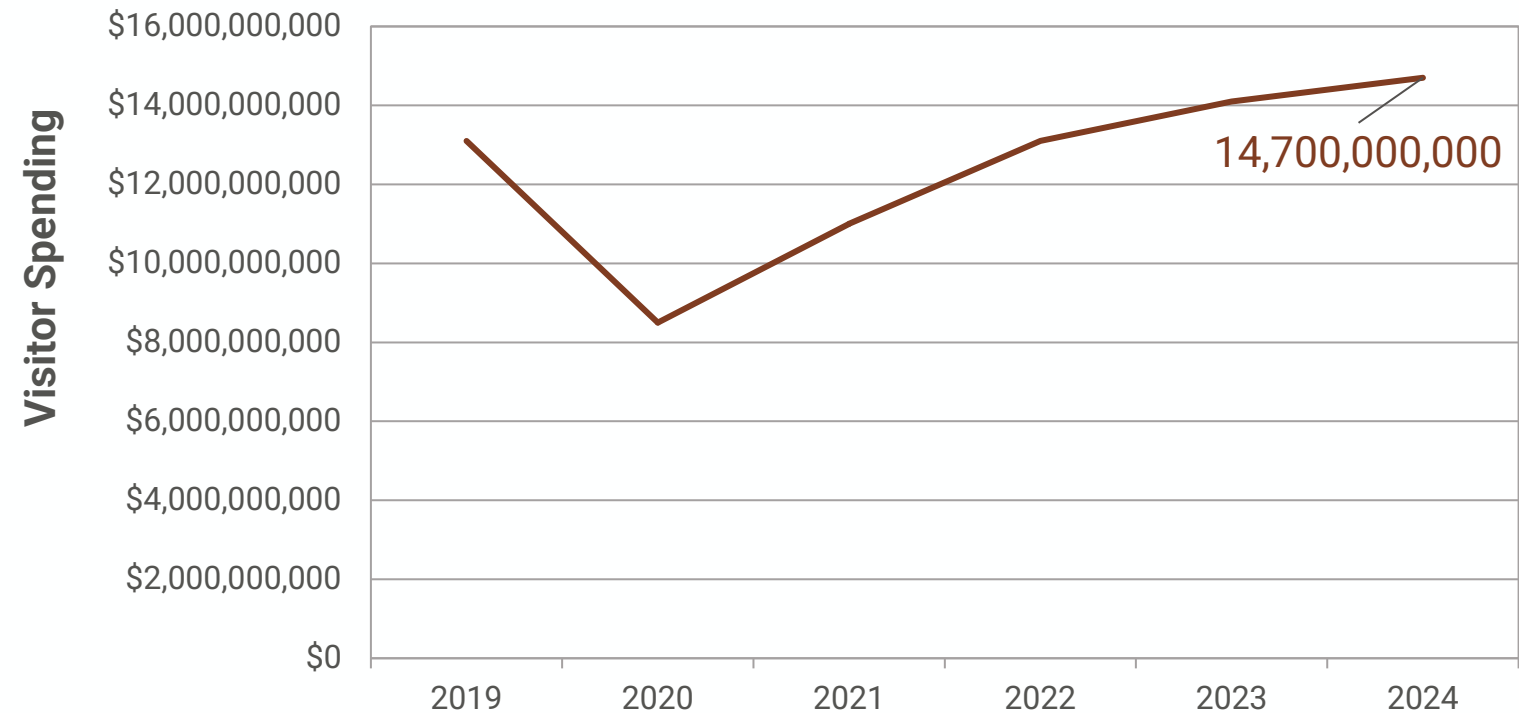
# Minnesota’s visitor volume of 81.6 million is a 1.7% YoY increase



Sources: Longwoods & Tourism Economics

# Visitors' 2024 (direct) spending of \$14.7 billion is a 4.3% YoY increase

MN Visitor Spending Over Time  
2019-2024



Source: Tourism Economics

The largest share of 2024 Minnesota visitor spending, \$4.5 billion or 30%, was on lodging, which includes hotels, short-term rentals and second homes.

Food and beverage had the second largest spending share with \$3.5 billion or 24%.

Transportation accounted for \$2.5 billion or 17% of visitor spending.

Retail spending was \$2.2 billion or 15%.

Recreation/entertainment accounted for \$2.1 billion or 14% of visitor spending.



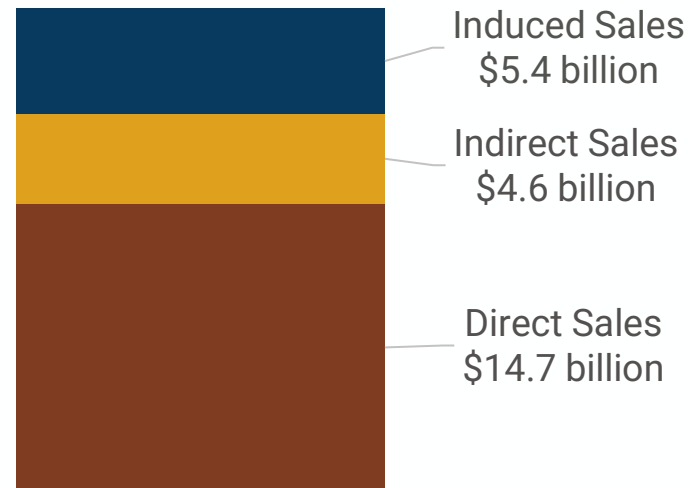
Minnesota visitors spent \$14.7 billion in 2024, which led to \$10 billion in indirect and induced impacts in sectors like finance, insurance, real estate and business services. In total, Minnesota visitors generated over \$24.7 billion in business sales.

Visitors to Minnesota helped sustain 132,000 jobs in 2024. Additionally, the indirect and induced impact of visitor activity supported 51,000 more jobs. In 2024, the total employment impact of 182,435 jobs was equivalent to 4.6% of all Minnesota jobs.

# Tourism had a \$24.7 billion total economic impact

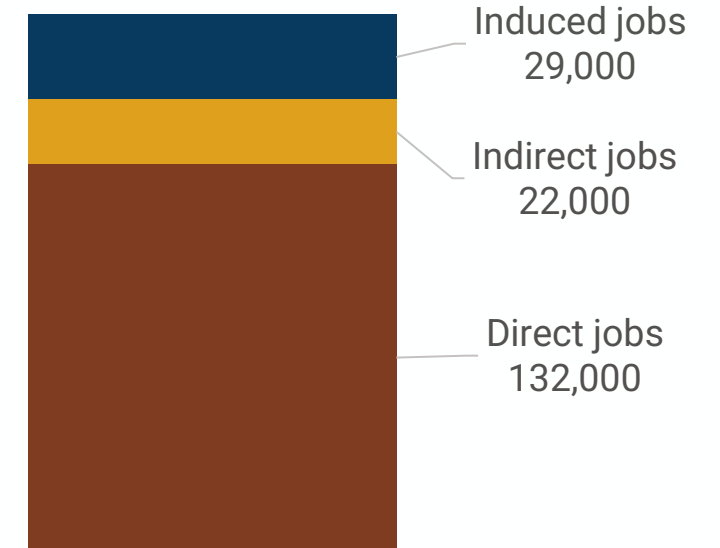
## 2024 Visitor Economic Impacts

\$24.2 Billion Total Sales



## 2024 Employment Impacts

182,435 Total Jobs



Source: Tourism Economics; See appendix for detailed impact definitions

Visitor spending in Minnesota generated \$4.1 billion in federal, state and local government revenues in 2024.

State and local taxes alone tallied over \$2.4 billion.

# Visitor spending saved each MN household \$1,031 in state & local taxes

## 2024 Fiscal (Tax) Impacts

\$4.1 Billion Total Tax Revenues



Source: Tourism Economics



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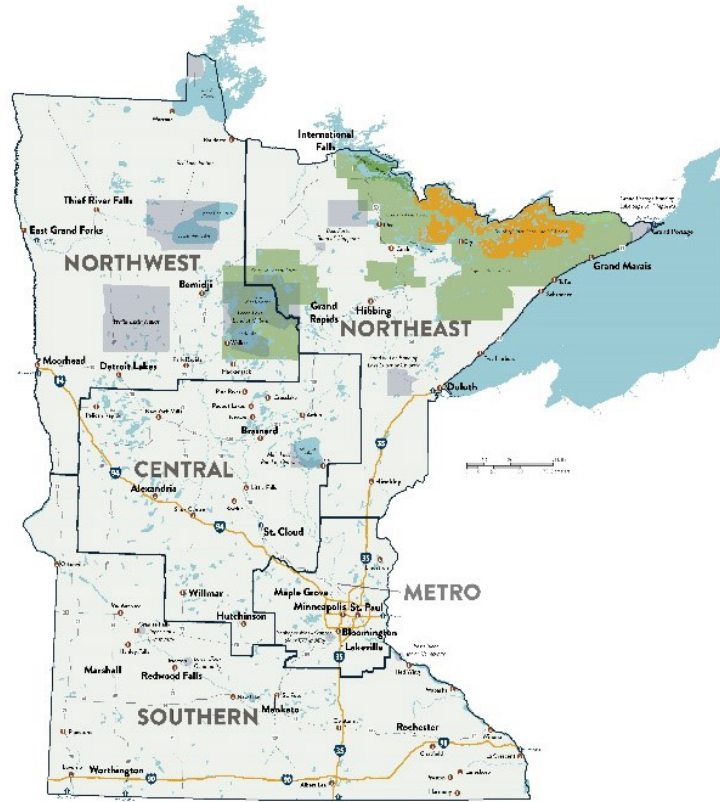




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# Lodging performance definitions



**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.



# Economic impact definitions

**Direct impact** – Impacts (business sales, jobs, income, and taxes) created directly from spending by visitors to a destination with a discreet group of tourism-related sectors (e.g. recreation, transportation, lodging).

**Indirect impact** – Impacts created from the purchase of goods and services used as inputs (e.g., food wholesalers, utilities, business services) into production by the directly affected tourism-related sectors (i.e., economic effects stemming from business-to-business purchases in the supply chain).

**Induced impact** – Impacts created from spending in the local economy by employees whose wages are generated either directly or indirectly by visitor spending.





# Future Partners research

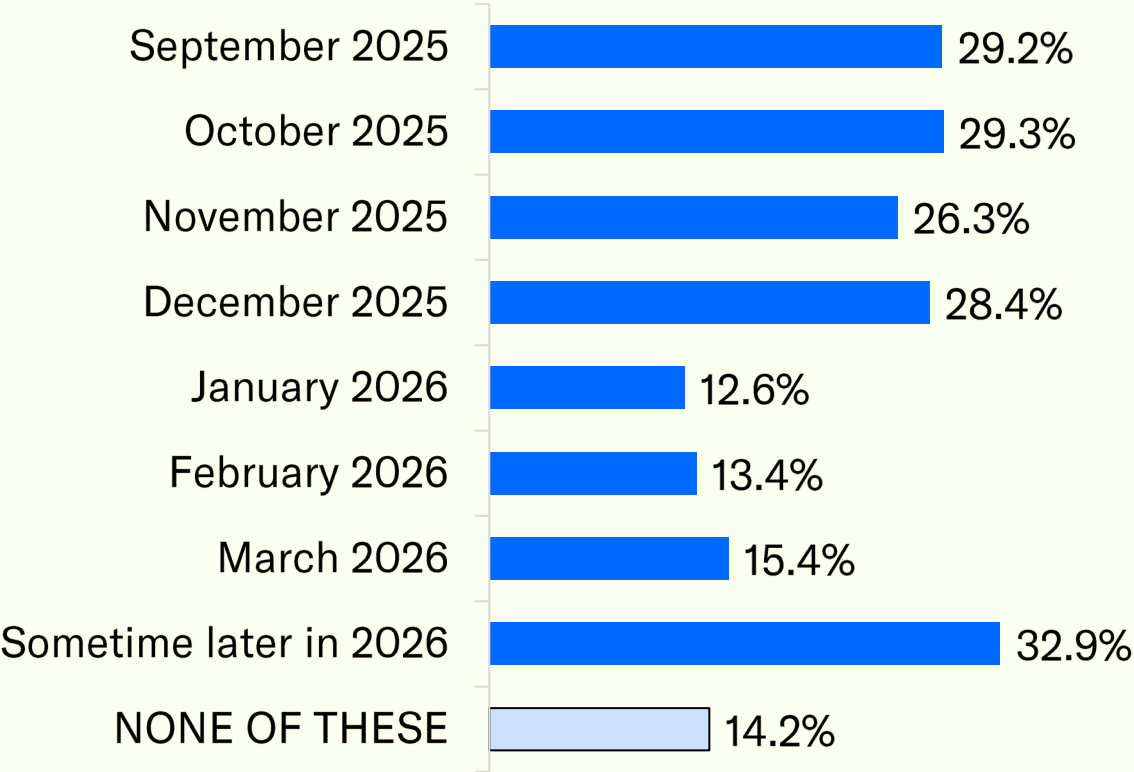
Highlights from the September EMN Continuing Education Session, and additional Minnesota-specific trends from their State of the American Traveler Plus dashboard.

# Future Partners: key findings

- **Americans continue to prioritize travel** – Despite some decreases, appetite for leisure travel remains strong with 86% having at least one trip planned in the next six months.
- **Economic concerns are impacting travel decisions** – Almost half of U.S. leisure travelers expect an economic recession in the next six months, and two-thirds are adjusting travel behavior accordingly. Most commonly, 29% select more affordable destinations and 26% use rewards programs to save money.
- **Minnesota attributes & perception learnings** – In a survey of U.S. leisure travelers, destination attributes include top rankings for scenic beauty, family friendly destinations, welcoming atmosphere, safety and exploration. The top reason for not visiting is that Minnesota is not on travelers' radar.
  - 42.8% agree that Minnesota is an affordable place to visit
  - 31.6% are familiar with things to do and see in Minnesota
  - 28.1% are motivated to visit Minnesota in the next 12 months
  - 21.9% are likely to visit Minnesota in the next two years

# 86% of Travelers Have at Least One Trip Currently Planned

**Question:** In which months do you currently have any leisure trips planned (even if only tentatively)?



86%

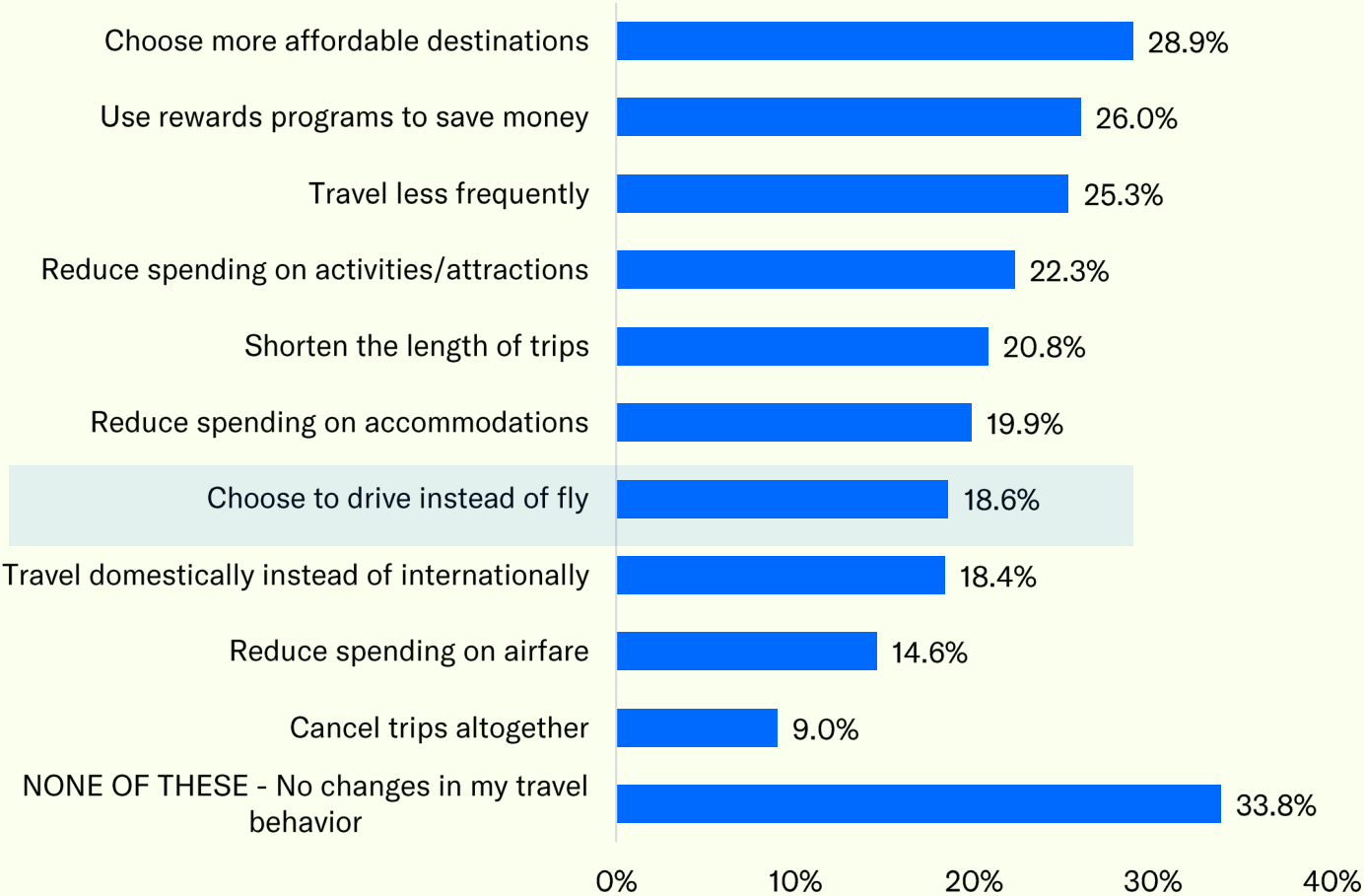


# Two-Thirds of Travelers Plan to Adjust Behavior Due to Economic Concerns

**Question:**

Have concerns about the economy led you to change your thinking about travel or travel plans for the NEXT SIX (6) MONTHS? If so, please describe how below.

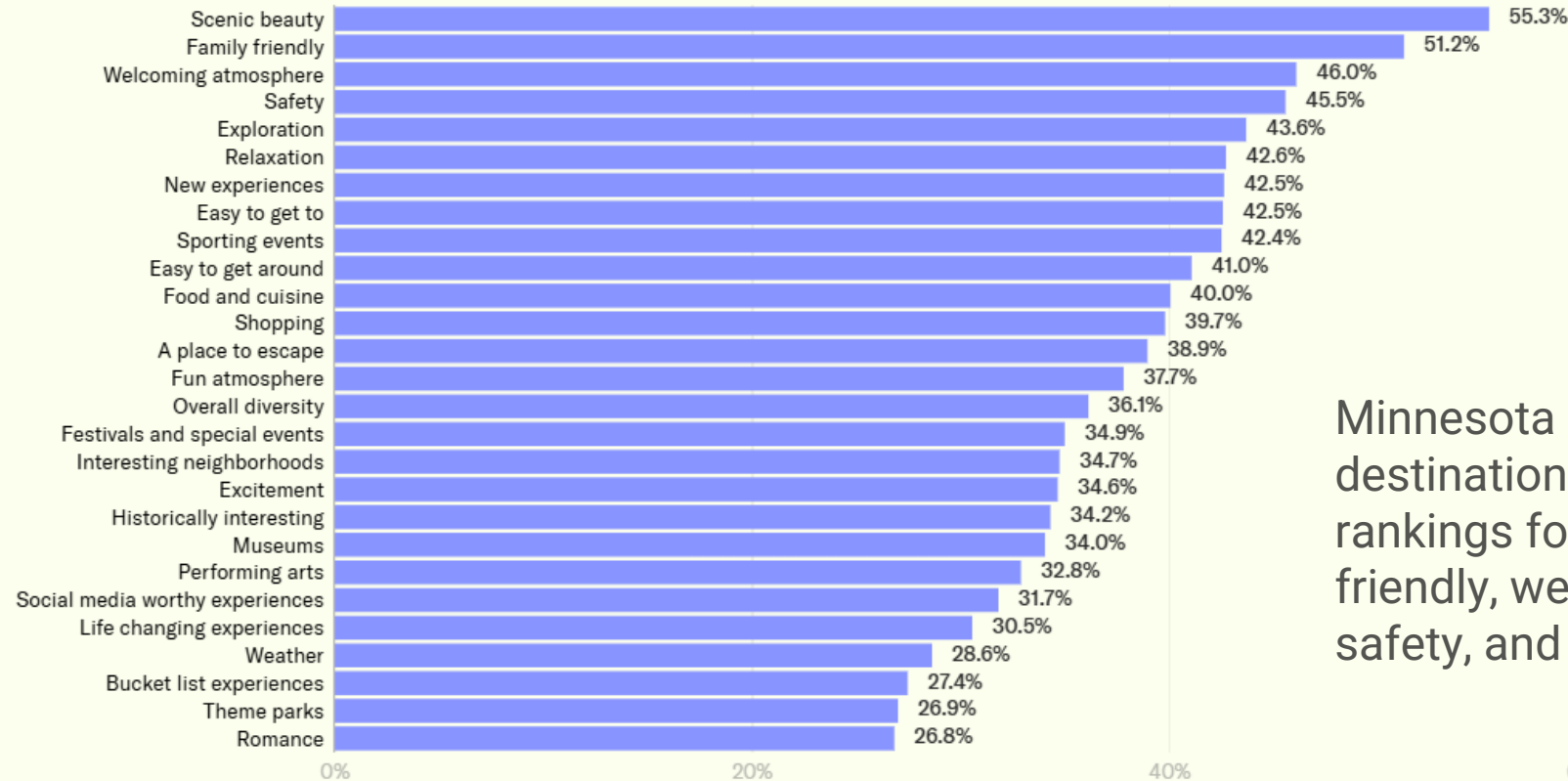
Due specifically to concerns about the economy, I expect to



# Minnesota attribute ratings

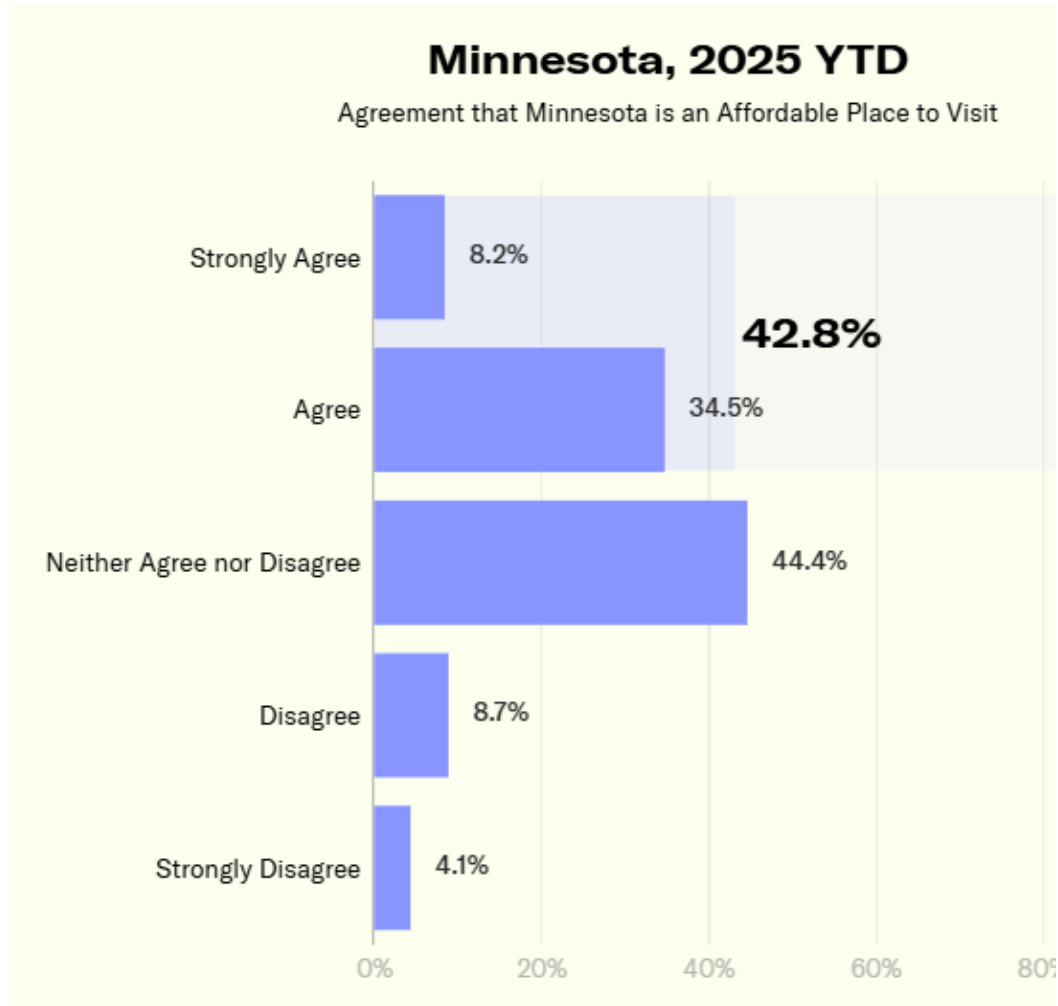
## Minnesota, 2025 YTD

(Top 3 Box - % Rating the Attribute "Slightly good" to "Extremely good" for Minnesota)



Minnesota ranks well for many destination attributes, including top rankings for scenic beauty, family friendly, welcoming atmosphere, safety, and exploration.

# Minnesota perceptions



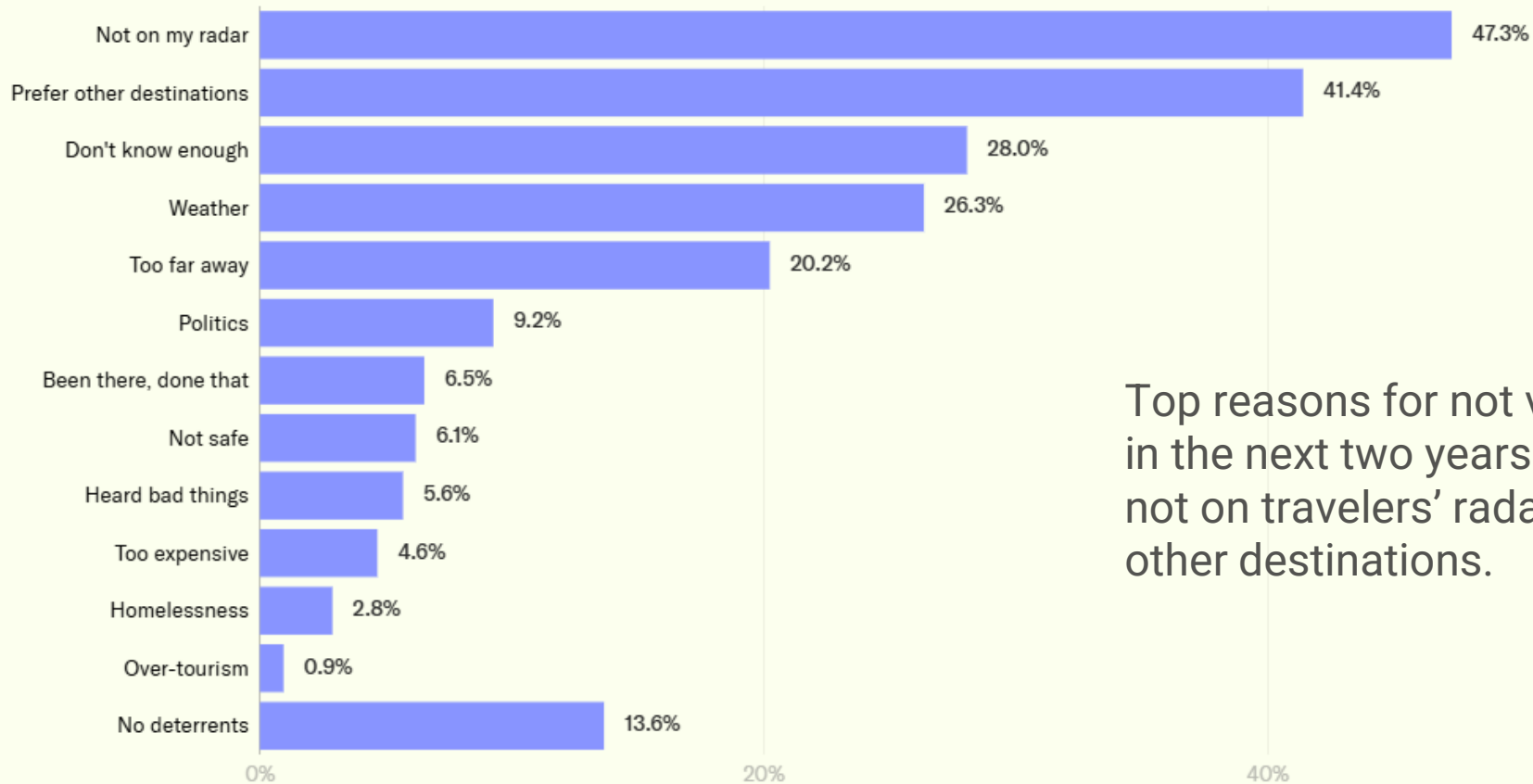
- 42.8% agree that Minnesota is an affordable place to visit
- 42% rate Minnesota as a unique leisure destination
- 36.4% agree that Minnesota has above average accessibility
- 31.6% familiar with things to do and see in Minnesota
- 28.1% motivated to visit Minnesota in the next 12 months
- 21.9% likely to visit Minnesota in the next two years



# Minnesota deterrent ratings

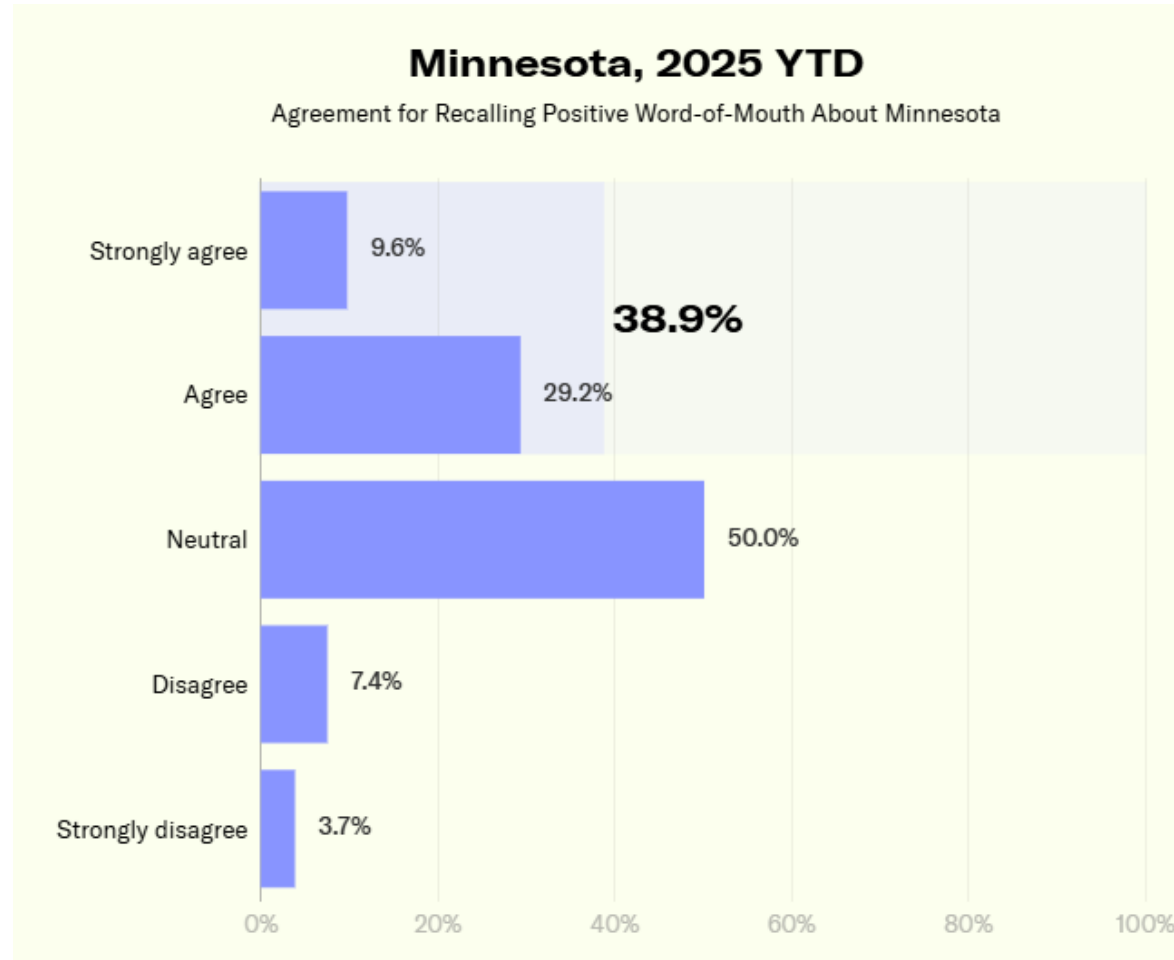
## Minnesota, 2025 YTD

Deterrents for Traveling to Minnesota for Respondents Unlikely To Visit in the Next Two Years



Top reasons for not visiting Minnesota in the next two years include that it is not on travelers' radar or they prefer other destinations.

# Minnesota media recall



- 38.9% agreement for recalling positive word-of-mouth about Minnesota
- 14.1% recall anyone (friends, relatives, celebrities, digital influencers, etc.) talking about Minnesota as a place to visit
- 11.9% recall seeing paid advertisements for Minnesota as a place to visit
- 10.4% recall seeing earned media (articles, stories or blogs) written about Minnesota as a place to visit



# Tourism Economics research

National economics and travel industry trends from a September webinar “The U.S. Travel Outlook: 2025 and Beyond”.



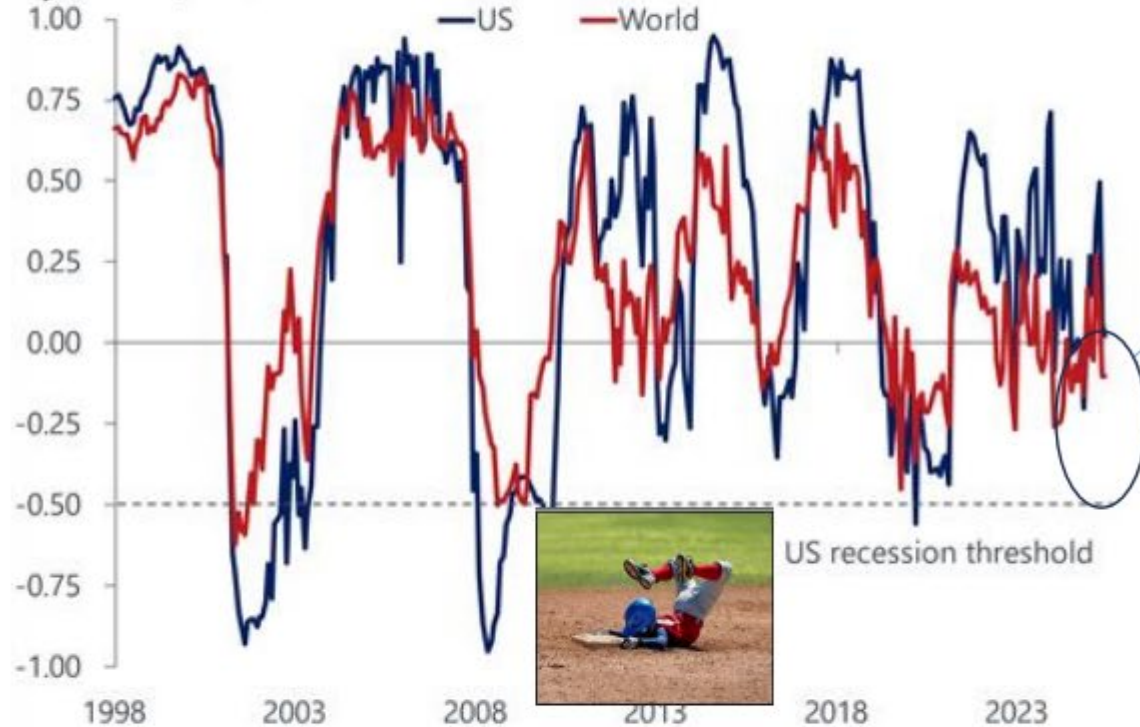
# TourismEconomics: key findings

- **Current economic conditions are challenging for many** – The U.S. job market, new tariffs and financial pressures on lower-income households are limiting travel industry growth. Hotel occupancy decreases and weaker average daily rate (ADR) have led to lower revenue per available room (RevPAR). Business and group travel are still recovering from the pandemic.
- **Decreased Canadian travel is impacting some northern states** – Negative international sentiment towards the U.S. has developed, and fewer Canadians are visiting. However, Minnesota's 2025 year-to-date hotel occupancy has increased 1.3%. At the same time, other northern border states, including Maine, North Dakota and Vermont, have experienced year-over-year (YoY) hotel occupancy rate drops of 5 to 6%.
- **Long-term U.S. economic trends remain favorable** – Overall U.S. household net worth and income growth are favorable, and Americans continue to prioritize leisure travel spend. Higher-income consumers will continue to drive bookings and industry revenue.

# A wild ride for the economy

Global: Oxford Economics' Business Cycle Indicator

Cycle Index, -1 to +1



Source: Oxford Economics



Give me a one-handed economist!  
All my economists say, On the one  
hand on the other.

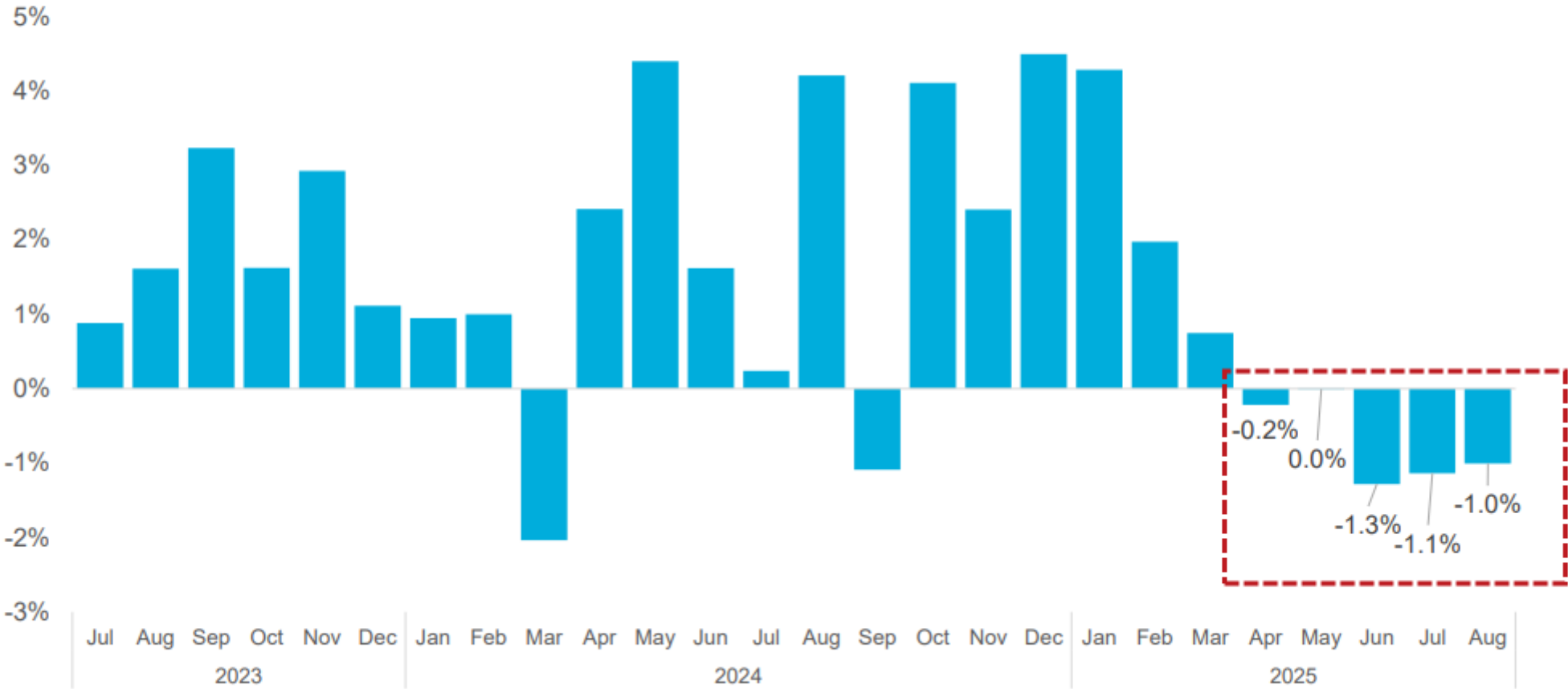
— Harry S. Truman —

AZ QUOTES

# Occupancy declines + weaker ADR = **↓ RevPAR**

## Hotel RevPAR growth

Year-over-year, US



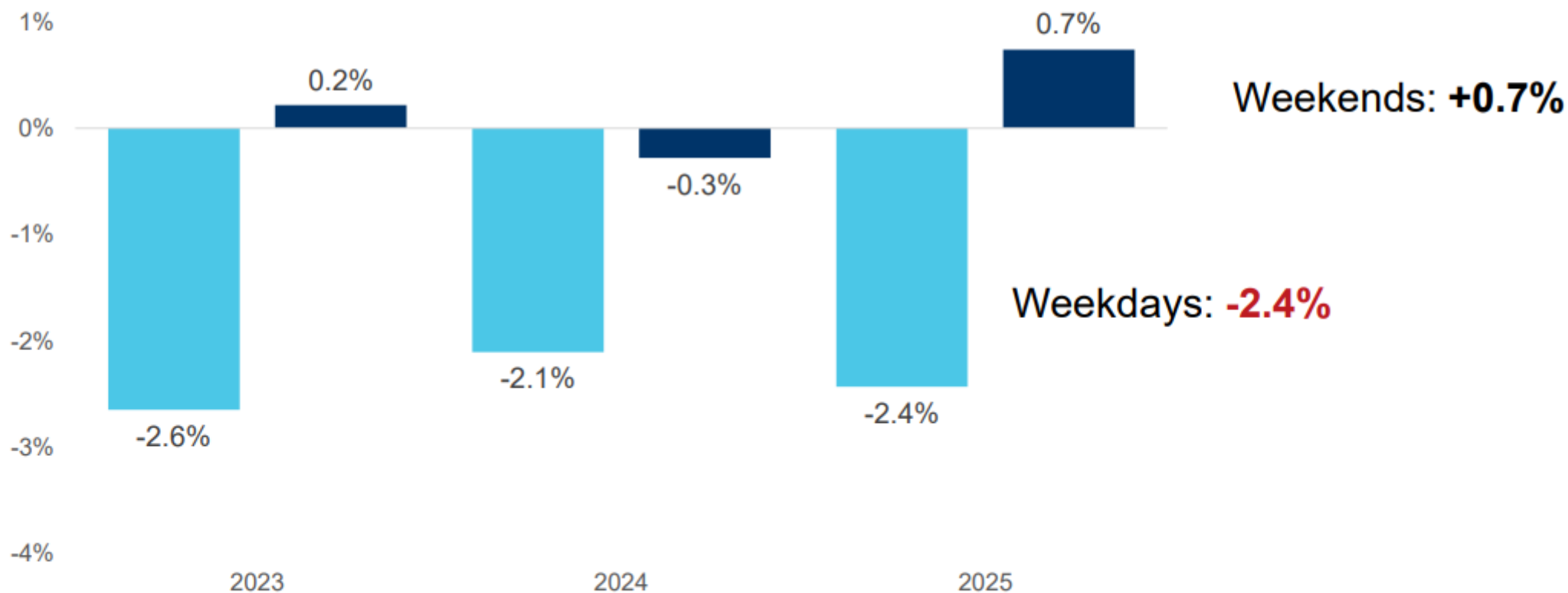
Source: CoStar-STR; Tourism Economics



# Weekends are back, weekdays aren't

## Weekend vs weekday hotel demand

Average demand, change relative to 2019, year-to-date through August of each year, US

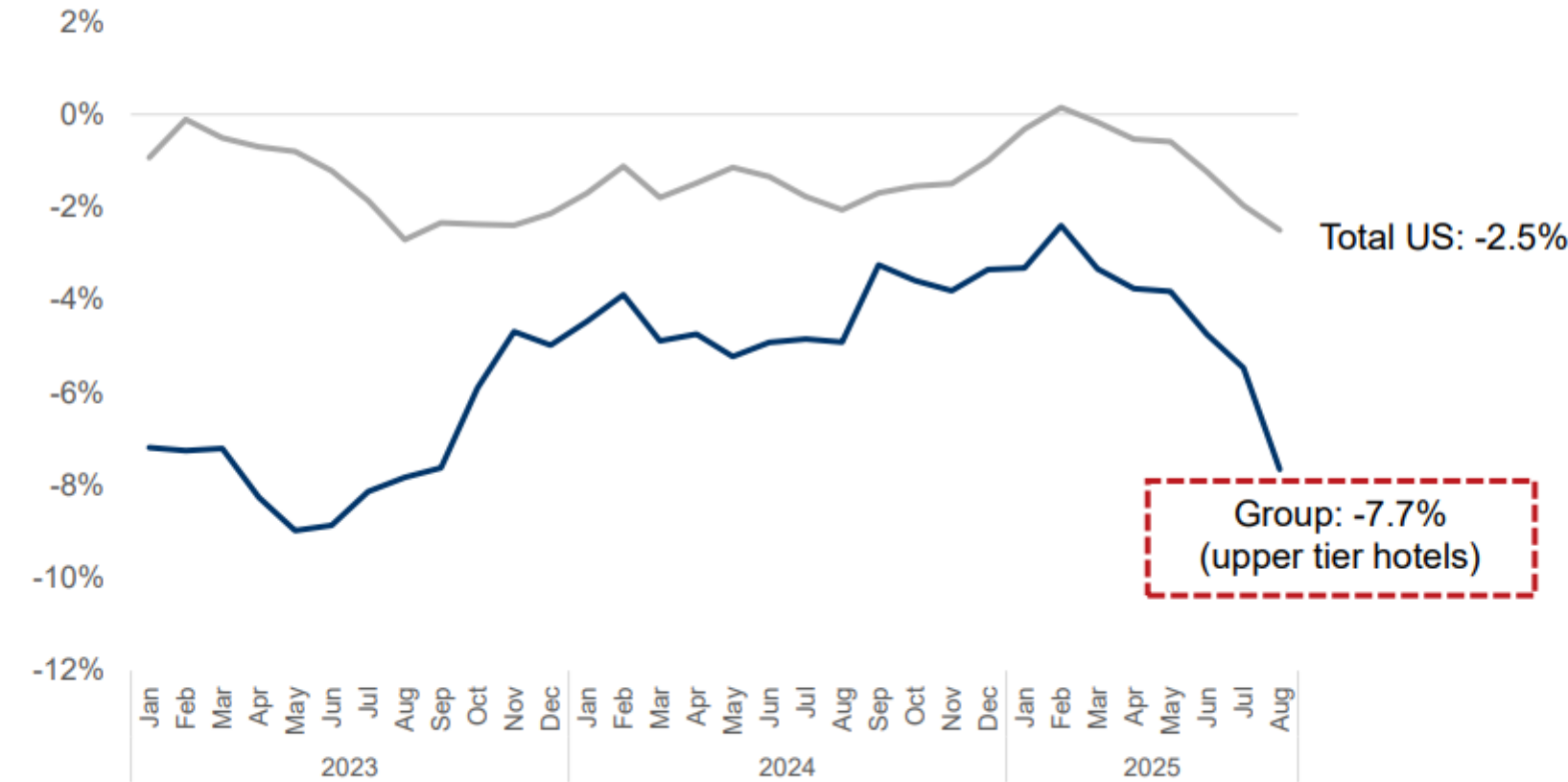


Source: CoStar-STR; Tourism Economics

# Group demand recovery still incomplete

## Group demand

Six-month moving average, relative to 2019

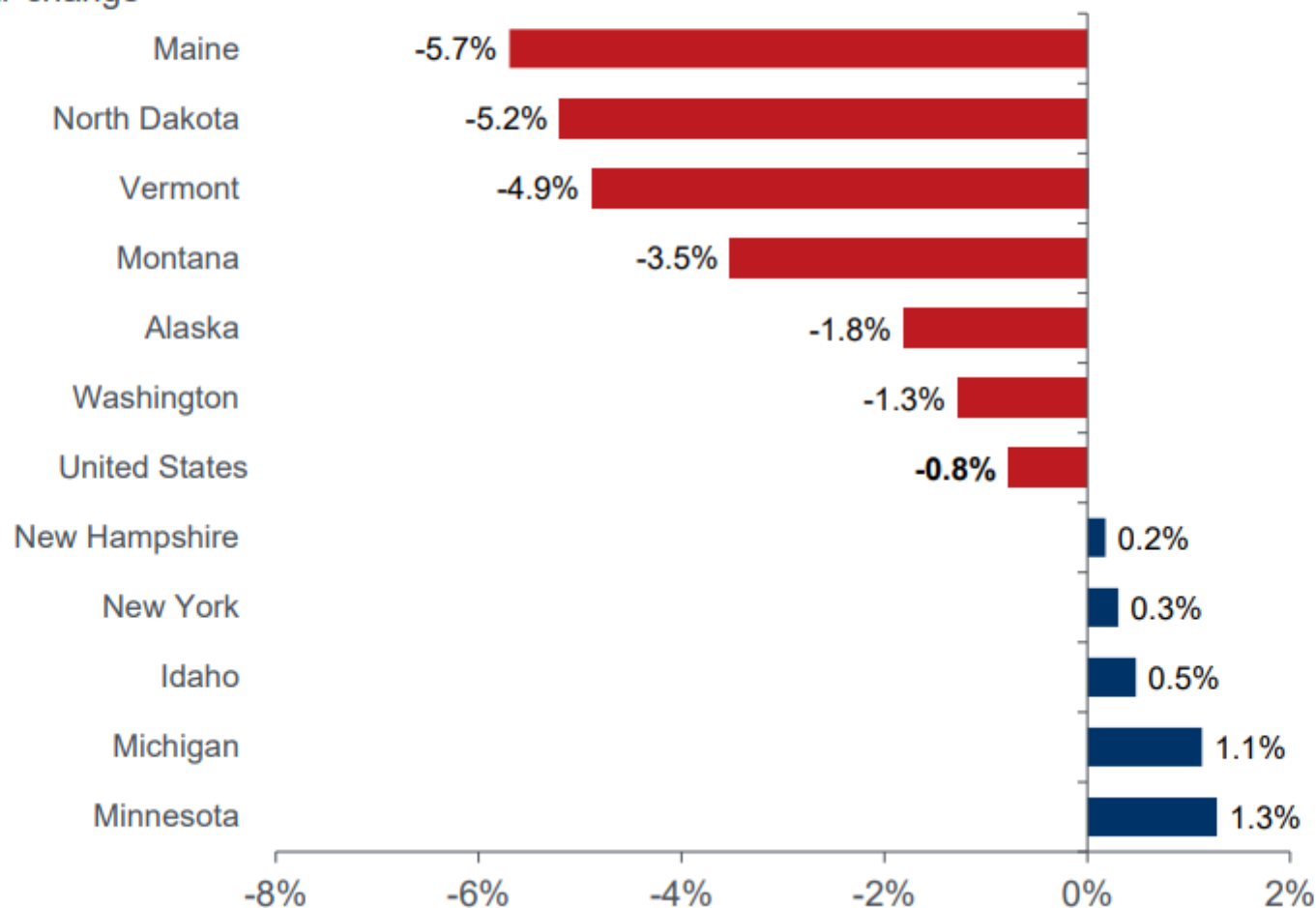


Note: Upper-tier hotels refers to luxury and upper upscale chain scales.  
Source: CoStar-STR; Tourism Economics

# Pressure on occupancy along Northern border

## Northern border state hotel occupancy rate (Aug 2025 YTD)

Year-over-year change



Source: CoStar-STR; Tourism Economics



# Healthy household balance sheets

## Consumer debt service payments

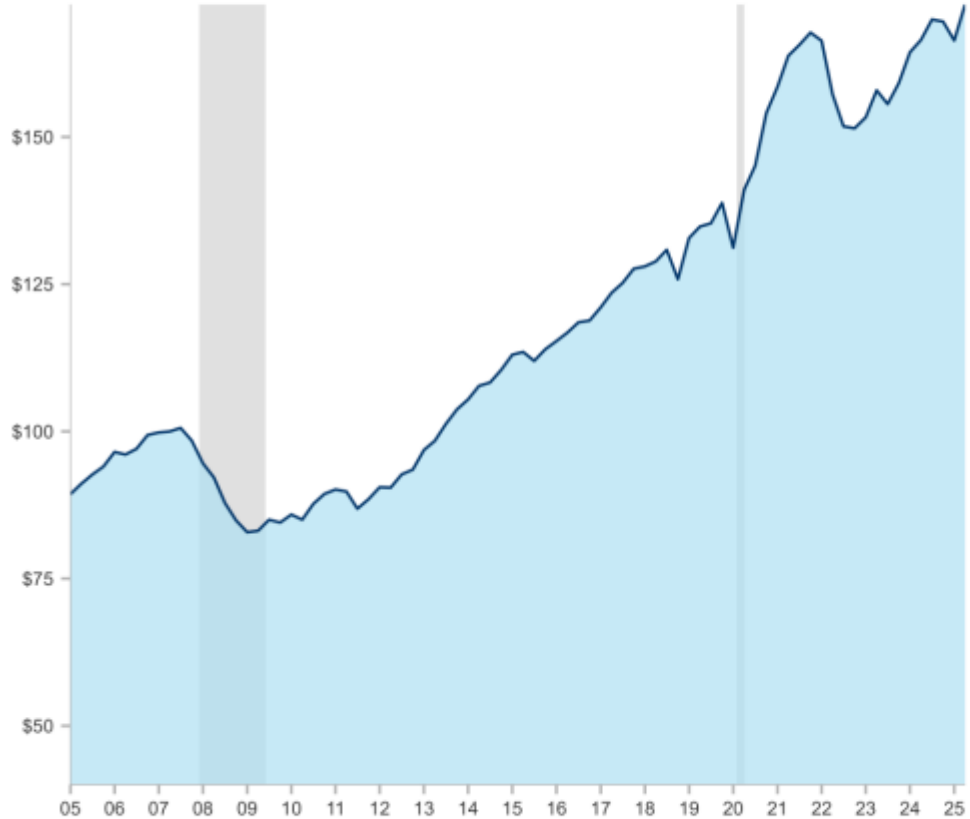
As percent of disposable personal income



Note: Quarterly data through 2025Q2. Consumer debt service payments ratio is ratio of total required household debt payment to disposable income. Source: Federal Reserve, NBER

## Household net worth

In trillions, real

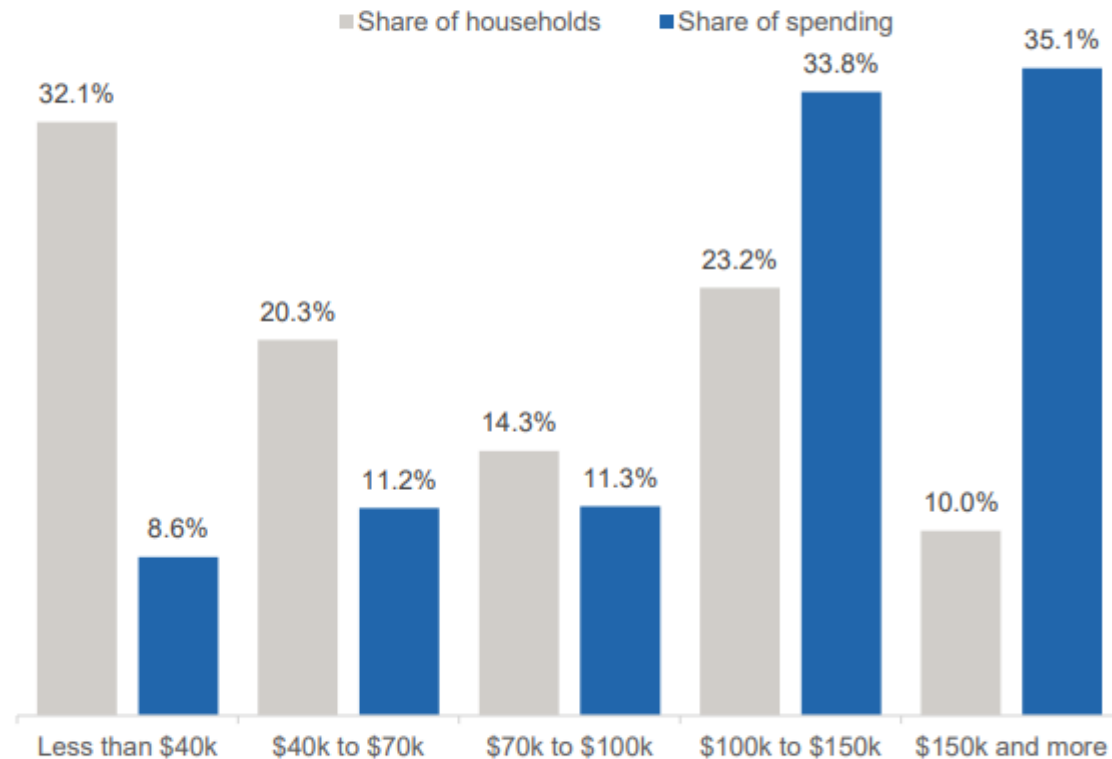


Note: 2024 dollars. Quarterly data through 2025Q2. Net worth of households and nonprofit organizations. Measures housing and financial assets, minus liabilities. Source: Federal Reserve, NBER

# Higher-income households are key

## Lodging spending by household income

Leisure travel, 2023



One-third of households account for more than two-thirds of spending on lodging

Note: Based on three-year average through 2023.

Source: BLS, Tourism Economics



# MMGY Global

Family travel highlights from the  
Summer Portrait of American Travelers  
Report.



# MMGY Global: key findings

- In the next year, **36% of active U.S. leisure travelers intend to travel with their children** (younger than 18). Additionally, in the coming year, 32% intent to take a multigenerational trip (with three or more generations).
- **Children influence travel planning aspects**, including choosing the vacation destination (69%), where to stay (62%) and daily activities (76%).
- In the next year, **two-thirds of travelers with children will take an overnight trip so that their children can participate in an activity**. Activities families travel for include: sporting events (33%), performing arts and music events (24%), summer camp (22%), cultural events (22%), talent shows (20%), academic competitions/camps (16%) and college preparatory events (15%).

# A Look at the Family Traveler

An active leisure traveler who intends to travel with their children (younger than 18) in the next 12 months.

36%

of Active Leisure Travelers

4.4

Number of Leisure Trips  
Expect to Take During  
the Next 12 Months

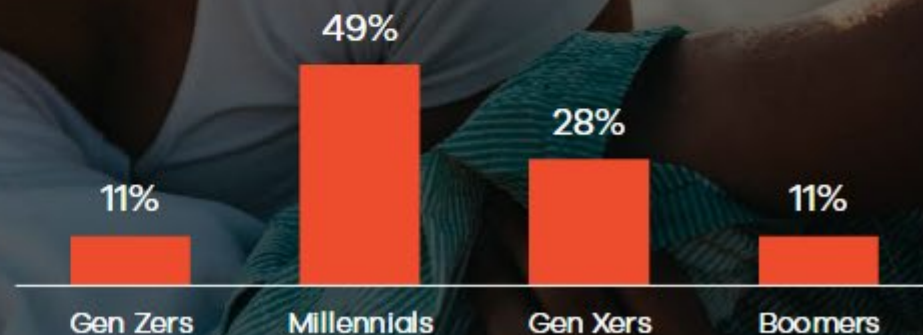
\$4,751

Average Amount Expect to  
Spend on Leisure Trips During  
the Next 12 Months

## Top Travel Motivators:

- Spending time with spouse/children (85%)
- To get away and unplug (78%)
- Exploring nature and the outdoors (73%)

% Who Are Family Travelers





# Intent to take multigenerational trips has increased from one year ago.

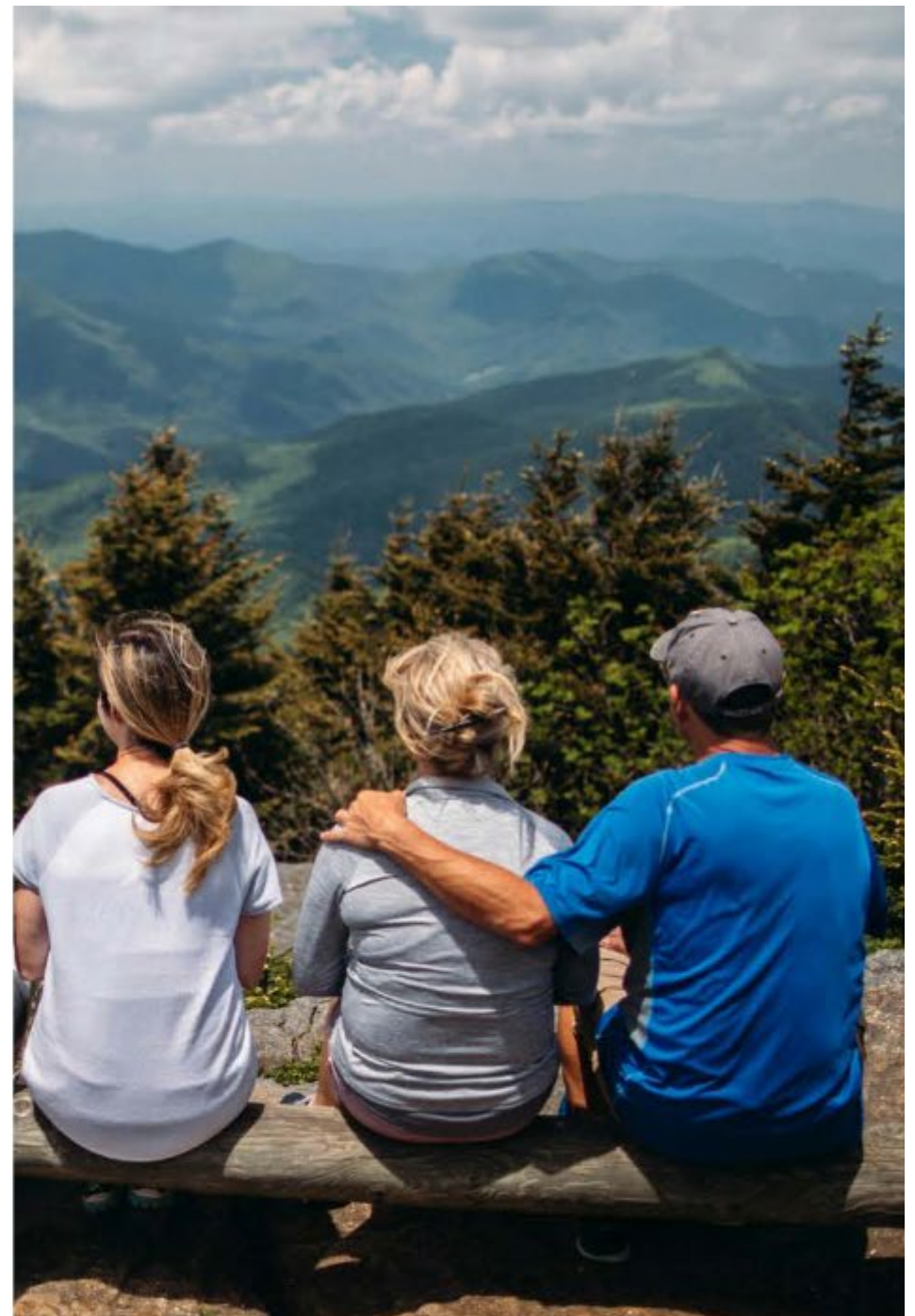


of active leisure travelers plan to take a multigenerational trip\* during the next 12 months. This is a 3% increase from 2024, indicating that more U.S. leisure travelers are making time to vacation with their extended families in the coming year.

*\*A multigenerational vacation is one in which there are three or more generations (e.g., children, parents and grandparents).*

**Base:** Active leisure travelers (n=3,546)

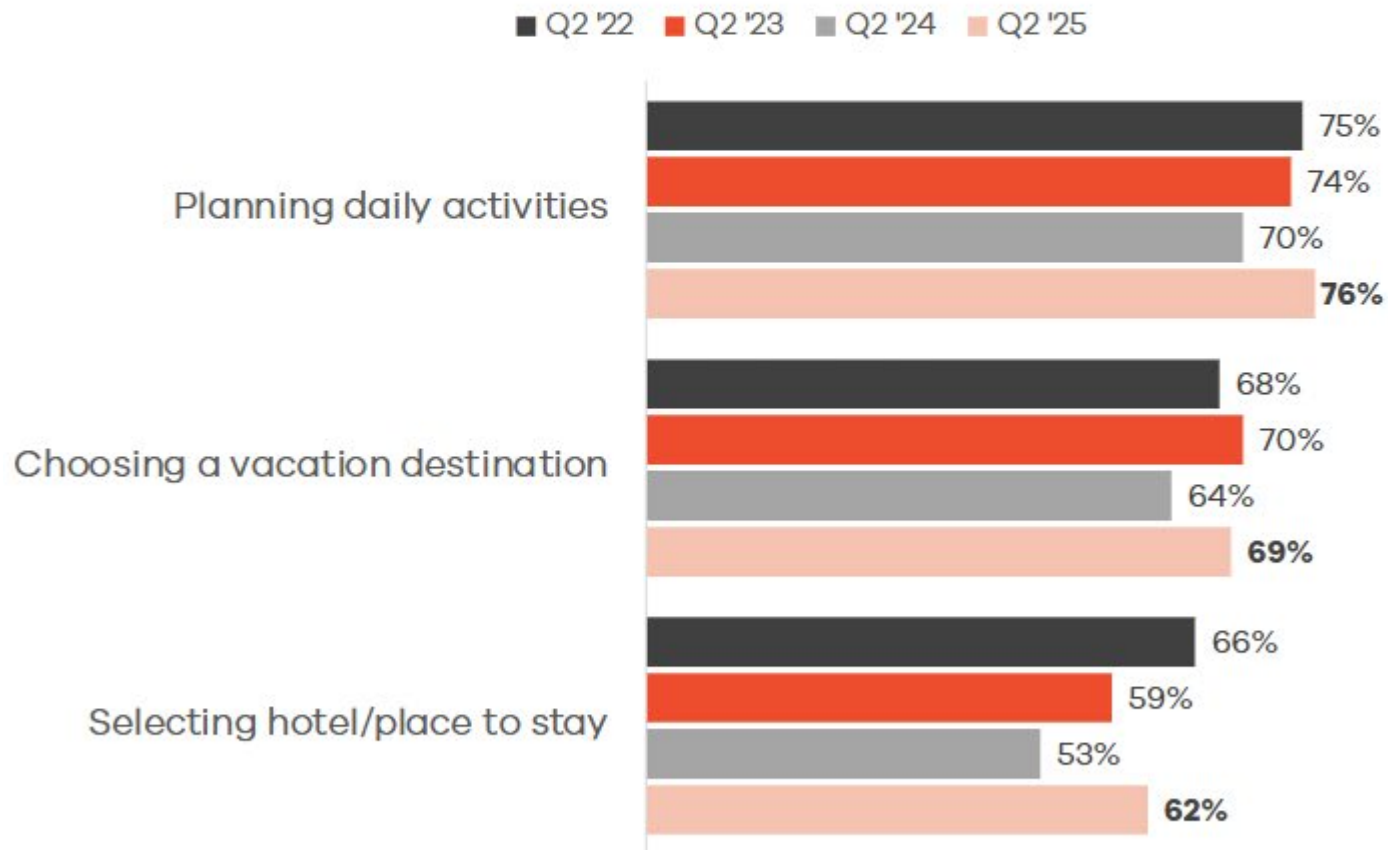
**Source:** MMGY's 2025 *Portrait of American Travelers*® "Summer Edition"





# Children's influence on travel planning has grown significantly from Q2 2024.

Influence of Children on Vacation Planning  
% Influential (Top 2 Box)



Data in bold indicates a statistically significant difference from Q2 2024.

**Base:** Active leisure travelers who have children (n=1,283)

**Source:** MMGY's 2025 *Portrait of American Travelers*® "Summer Edition"



# Two in 3 travelers with children under 18 will take an overnight leisure trip for their children to participate in some form of activity.

Do you plan to take any overnight trips specifically for your child/children to participate in any of the following activities?	Travelers With Children Under 18
<b>Child Will Participate in Activity (Net)</b>	<b>67%</b>
Sporting events	33%
Performing arts and music events	24%
Summer camp	22%
Cultural and heritage events	22%
Talent shows	20%
Academic competition/camp	16%
College preparatory events	15%
<b>None of the above</b>	<b>33%</b>

## Key Takeaways:

- The significant proportion of U.S. leisure travelers who are willing, and planning, to take overnight trips for their children's activities indicates a significant market for destinations to embrace.
- Sporting events remain the most popular activity for children, although more academic pursuits also lead to a significant level of travel.