Greetings,

We often talk about travel and tourism in quantifiable terms: $16.0 billion in sales, $1.04 billion in state sales tax, and 273,000 leisure and hospitality jobs are all figures we can be proud of. We also achieved impressive results from our marketing efforts, including $708.6 million in traveler spending and a return on investment of 18-to-1 from our spring/summer advertising campaign. Not to mention a record 5.4 million visits to our website, 2.5 billion in estimated audience reach from public relations, and 125 million impressions on social media.

But as we all know, travel and tourism is about much more than numbers. It’s about the experiences that our 73 million annual visitors have while they’re here, from crossing the Mississippi headwaters to catching their first walleye to seeing a world-class live performance. It’s about fulfilling lifelong dreams, like walking in the footsteps of your favorite artist, riding a roller coaster inside a mall or eating a fried candy bar on a stick.

This year, we took all of those experiences and more and gave them a name. We called it “Find Your True North,” which is not a specific place or even a latitude but something you find within yourself. It’s that moment, or a series of them, when you realize that no matter where you are, you’re exactly where you’re supposed to be.

This message was shared with travelers who already know us, as well as new audiences who may have never considered visiting Minnesota before. This new national strategy reached people from California to New York to Texas who have a vested interest in some of the things that our state does best, such as biking, hiking, arts and culture, golf, shopping and winter sports. And it worked: The tax ROI from these national niche markets was triple that of traditional markets, at $31.

Internationally, Minnesota continued to grow as a global destination. We worked with our partners, multi-state groups and Brand USA to promote Minnesota to markets from France to China to the U.K. We continued our group tour efforts, and interacted with millions of prospective travelers in person, on the phone and online.

Looking forward to 2020 and beyond, the excitement around Minnesota continues to grow. The second year of the “Find Your True North” campaign is poised to reach new and existing audiences, inspiring even more people to experience firsthand all they can discover on a trip to Minnesota.

Of course, none of these successes would have been possible without your hard work to welcome travelers to our great state and ensure they have the experience of a lifetime. Because at the end of the day, it’s these experiences that make a Minnesota vacation something that cannot be measured.

Sincerely,

John F. Edman, Director
SALES
Leisure & hospitality
$16.0 BILLION
in gross sales annually
Nearly
$44 MILLION
a day

REVENUE
$1.04
Million in state sales tax
Representing
18%
of total state sales tax revenue

JOBS
273,000
Full- and part-time jobs
11%
of total private sector employment
$6.1
Billion in wages

Note: Sales, revenue and jobs data is for the leisure and hospitality sector, 2018. Data not available yet for 2019.
GENERAL FUND OPERATING BUDGET FOR FISCAL YEARS 2019-20:

$14.2 MILLION

Annually*

*Includes $500,000 in supplemental state funding available when private sector support generated by Explore Minnesota is at least $3 million.

PRIVATE INDUSTRY MATCH

Cash: $3.2 million

In Kind: $7.6 million

Total: $10.8 million

ALLOCATION OF BUDGET

- 19% Technology & Operations
- 7% Industry Outreach
- 7% Market Development
- 6% Welcome Centers
- 4% Partnership Grants
- 57% Marketing & Communications
EXPLORE MINNESOTA

$708.6 MILLION
in traveler spending

WEBSITE VISITS
5.5 MILLION

+10%
YOY growth in website visits

ACHIEVED AN
18-TO-1
total return on investment from spring/summer marketing efforts, including a 10-to-1 ROI from core markets and 31-to-1 ROI from new national niche markets

FIND YOUR TRUE NORTH:
BRAND CAMPAIGN LAUNCH

ADVERTISING MEDIA

Spring/Summer: 60%
Fall: 19%
Winter: 21%

Digital: 44%
TV: 25%
Social Media: 14%
Search: 9%
Print: 4%
Radio: 3%
Out-of-Home: 1%

MARKETING PARTNERS
The True North campaign highlighted the hidden gems and popular attractions found throughout Minnesota, including distinct outdoor adventures, urban cultural experiences, and iconic landmarks.

Find Your True North was launched in spring 2019. The campaign features a series of television ads, radio, print and digital ads.

Core markets: Wisconsin, Iowa, North Dakota, South Dakota and across Minnesota. Additional target markets include Chicago, Denver, Kansas City, Omaha, and Winnipeg.

Top increases by State (YOY web visitation):
1.) New York +95%
2.) California +94%
3.) Florida +87%

Highest growth sources: paid social media, native advertising, organic search.
Niche Strategy

1. **Explore Minnesota**
   - General Awareness

2. **Your True North**
   - Passion Building
   - Key Interest Segments

3. **#OnlyinMN**
   - Personalization

- Focus on interests vs. sheer proximity
- Talk to these audiences in their natural habitats through content partnerships
- Leverage known Minnesota connections/affinity

**Digital Media Breakout**

- 28% Paid social
- 1% Digital re-targeting
- 71% Content partnerships

**Content Partnerships**

- Golfweek
- *pb* pinkbike
- AFAR
- SKY
- BACKPACKER

**Niches for 2019**: hiking, biking, arts and culture, winter recreation, shopping and golf
CONSUMER REACH AND ENGAGEMENT

SOCIAL MEDIA

DIGITAL REACH

1.5 MILLION
total engagements

Totaling nearly
530,000
followers

251,933
email subscribers
2.5 BILLION
in estimated audience reach via internal and agency public relations

3,695
story placements

MINNESOTA’S UNIQUE REGIONS

ALL FOUR SEASONS

INDOOR AND OUTDOOR ACTIVITIES

TRAVEL & LEISURE

BUSINESS & TRADE

SHOW

SHOW

COVERAGE OF

NOTABLE COVERAGE

‘Find Your True North’ is new Minnesota tourism campaign

Best of the Midwest: 9 must-see destinations worth a visit in 2019

St. Paul, Minn.

Chicago Tribune

MENS JOURNAL

Off the Beaten Path: 21 Epic Views Every Hiker Should See

America’s Best Places to See Fall Colors (That Aren’t in New England)

Summer Tourism in Minnesota Proved Strong in 2019

10 Best Cold Weather Winter Vacations to Book Now

TRAVEL SUMMIT

SHOW

SHOW

HIGH-PROFILE STORY PLACEMENTS

Trvl

USA TODAY

AARP

MEN'S JOURNAL

Travel

THRILLIST

Food

The Discoverer

Cheapism

Fox

North

AFAR

Lonely Planet

Budget Travel

Travel100Group

Fodor's Travel

Chicago Tribune

Leisure

Star Tribune

KIMT

Twin Cities Business

Minnesota Monthly

WCCO

WCCO

FNS

Muslim St Paul
Provided personalized customer service to nearly

4 million

travelers

2.8 million

visitors to Welcome Centers

Distributed over

2 million

printed Minnesota travel publications and maps
Produced the annual Explore Minnesota Tourism Conference and Explore Minnesota Tourism Awards. This two-day educational event was held at the Intercontinental Saint Paul Riverfront hotel and welcomed over 350 industry and partner attendees.

**Co-op**

170 industry partners participated

The #OnlyinMN monument has traveled to 21 locations statewide

**Governor’s Opener Events**

- Minnesota Governor’s Fishing Opener
- Minnesota Governor’s Pheasant Hunting Opener
- Minnesota Governor’s Deer Opener

**Timely Research**

Collaborated with Department of Revenue on reporting of leisure and hospitality sales tax data used to track industry performance

Surveyed lodging properties and campgrounds on business levels, revealing very strong year-over-year growth in summer occupancy and revenue

Conducted new traveler profile study of Minnesota visitors. Dining at local restaurants and shopping were the top activities, and visiting friends/relatives was the top trip motivator.
GROUP & INTERNATIONAL MARKET DEVELOPMENT

$1.1 BILLION in spending from international overseas visitors (not including Canada)

476,800 international visitors (not including Canada)

567,400 Canadian overnight visitors

$5.5 MILLION generated in media value resulted from hosting 33 international writers

Published 2019 Minnesota Group Planner distributed to over 2,000 tour operators nationwide

Hosted Partner Participation booths at:
- American Bus Association Marketplace – Louisville, KY
- Minnesota Group Tour Marketplace – Chanhassen, MN
- IPW – Anaheim, CA

Generated over 150 group tour operator leads & over 200 international tour operator leads

Strong partnership and board representation with Brand USA, leveraging Explore Minnesota’s investment in international consumer marketing programs valued at $34 for every $1 spent

Majority of visitors from Europe and Asia, including the U.K., Japan, Germany and China