

Minnesota International Travel Trends & Canadian Inbound Travel Survey Findings

May 2025

Objective and Approach

Explore Minnesota (EMN) monitors international travel research and data to track segment health and origin market trends. As the national conversation around declining international sentiment and travel to the U.S. evolves, EMN seeks to understand state-specific international travel dynamics better and share key findings. Key stakeholders include Minnesota's tourism industry and travel-related businesses, the Minnesota Governor's Office, state government leaders and agencies, Senators Klobuchar and Smith, regional destination marketing organizations, Brand USA and the U.S. Travel Association.

Data sources included in this analysis are Tourism Economic International States Travel (IST), U.S. Customs & Border Protection and an EMN tourism industry survey. The Minnesota tourism industry survey focused on declining Canadian sentiment and travel. It was open from April 28 to May 9 and received 113 responses. Survey respondents are Destination Marketing Organizations (DMOs), including convention and visitors bureaus, chambers of commerce and related organizations representatives, and Leisure & Hospitality (L&H) businesses, including overnight accommodations, food/drink establishments, attractions and entertainment companies.

Findings Summary

A review of state-specific data sources confirms that declining sentiment towards the U.S. is impacting international travel to our state. While Minnesota's international arrivals grew by 8% in 2024, they are expected to decrease by 13% in 2025. Unfortunately, this decrease compounds challenges for Minnesota's tourism and hospitality businesses, which are still seeking to recover to pre-pandemic international visitor volume and spending levels.

More than half of Minnesota's international visitors come from Canada. Therefore, it is especially relevant to consider travel activity from our northern neighbor. In the first four months of 2025, Canadian travelers arriving in Minnesota by air and land were down 3.5% relative to 2024. In the recent EMN industry survey, more than 60% of participating Minnesota L&H businesses and DMOs reported they expect summer 2025 business activity from Canadian travelers to be down relative to summer 2024. Additionally, approximately 20% of overnight accommodations reported that 11% or more of their summer 2024 bookings were Canadian travelers.

For context, it is important to note that in the EMN industry survey, many Minnesota tourism and hospitality businesses reported that Canadian travelers either do not frequent their businesses

or comprise a small share of their customer base. This aligns with the finding that in 2023, Canadian visitation accounted for .4% of Minnesota's total visitation and .8% of Minnesota's visitor spending.

This summer, some Minnesota tourism and hospitality businesses anticipate a meaningful decline in Canadian and other international visitation and spending. However, our industry will more likely be impacted by *domestic* travel trends. As we move into the critical summer travel season, EMN will continue to monitor U.S. international and domestic travel activity and conduct additional surveys to gain perspective on Minnesota travel.

Multiple resources provide free travel and tourism research on an ongoing basis, including:

- AAA - [Newsroom](#)
- Future Partners - [Monthly State of the American Traveler webinars](#)
- Longwoods - [American Traveler Sentiment Surveys](#)
- MMGY - [Industry Insights](#)
- Tourism Economics - [Latest Research](#)

Additionally, free international travel research reports are available from:

- Longwoods - [Canadian Travel Sentiment Towards the U.S.](#)
- YouGov - [Canadian cooldown: sentiment toward U.S. travel plummets amid political tensions](#)
- Tourism Economics - [Inbound Travel to U.S. in Steep Decline](#)

Five Key Research Findings

Finding 1: Minnesota's international arrivals grew by 8% in 2024; however, international visitation is expected to decrease by 13% in 2025.



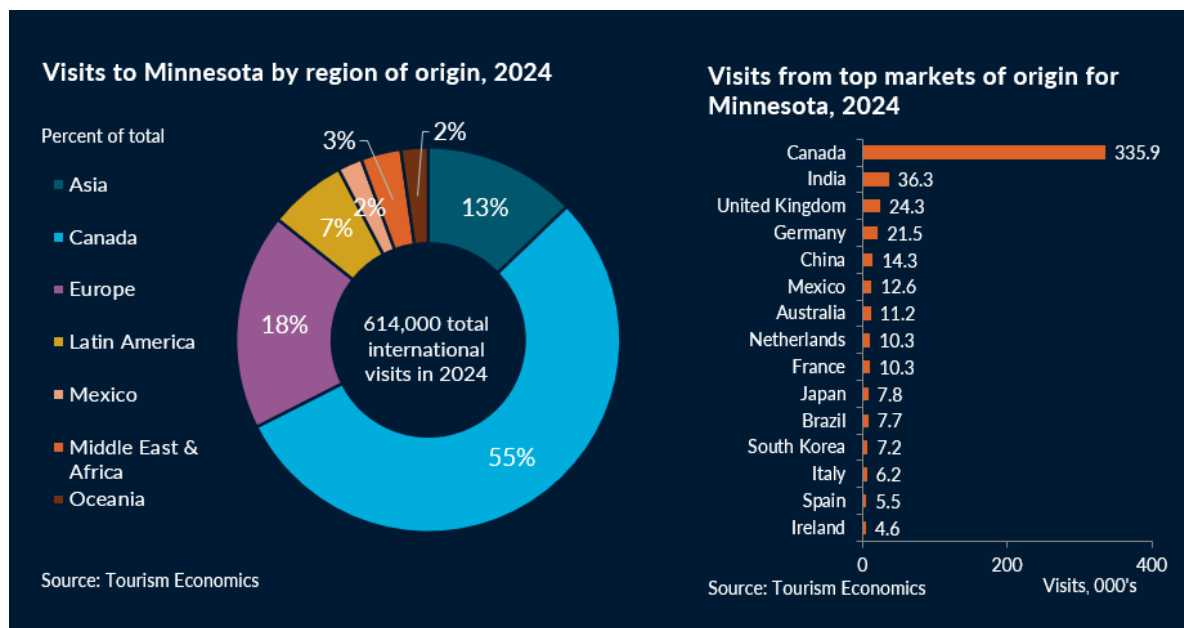
*Preliminary or forecasted data, final 2024 IST estimates will be available in fall 2025

Source: Tourism Economics – International States (IST) 2024 and Longwoods Travel USA 2023

In 2024, Minnesota's international visitation increased 8% year-over-year (YoY) to an estimated 614,200 international arrivals. International visitors spent approximately \$571 million in our state. In 2023, international visitation accounted for .7% of Minnesota's total visitation and 3.6% of Minnesota's visitor spend.

While Minnesota's international visitation has been recovering since 2021, international visitor volume remains significantly below the over 1 million international arrivals received pre-pandemic. Additionally, in 2025, Minnesota's international visitation is expected to decrease by 13% YoY to 532,200. Tourism Economics' forecast extends through 2035 when it is likely that Minnesota's international visitation will increase to 820,600.

Finding 2: In 2024, more than half of Minnesota’s international visitors were from Canada.



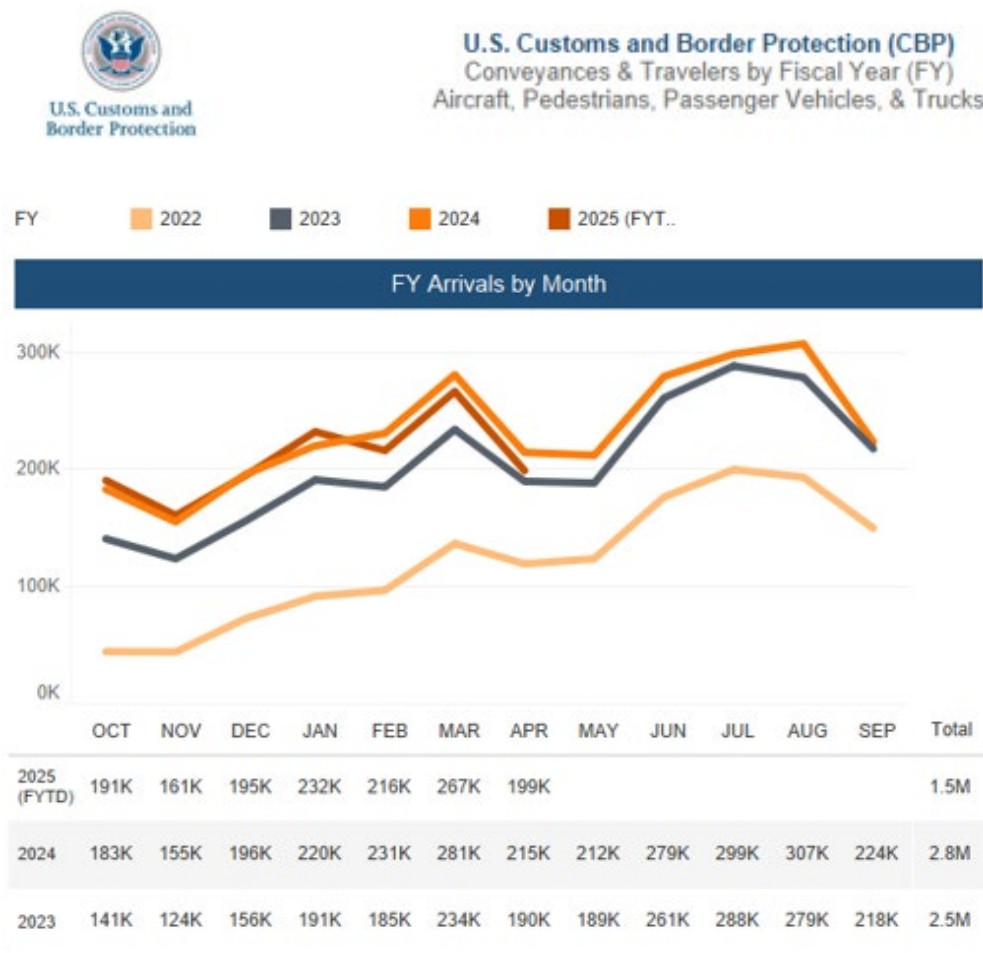
Sources: Tourism Economics – International States (IST) 2024 and Longwoods Travel USA 2023

In 2024, Canada accounted for 55% of Minnesota’s international visitation, with 335,900 visitors. Canadian visitors spent approximately \$110 million in our state. In 2023, Canadian visitation accounted for .4% of Minnesota’s total visitation and .8% of Minnesota’s visitor spending.

India continued as the number two Minnesota visitor origin market, with an estimated 36,300 visitors in 2024. The United Kingdom, Germany and China were the other top three countries for MN visitation in 2024. According to directional analysis of overseas travel data, in 2019 and 2023, the purpose of international trips to Minnesota and bordering states was 34% to visit friends/relatives (VFR), 28% business and 27% leisure. India had the highest percentage of business travel (49%), while Australia had the highest percentage of VFR (52%). Germany and the United Kingdom had the largest percentage of leisure visitors, at 36% and 35% respectively. China and India have the lowest percentage of leisure travelers, at 6% and 13% respectively.

In 2024, the Minneapolis-St. Paul (MSP) airport set a record for international travelers with 37.2 million passengers. This is a 6.9% YoY increase over 2023 international passengers. In 2024, MSP served 32 international destinations. This year, new international direct flights include MSP-Copenhagen (3x/week, May-September) and MSP-Rome (4x/week, May-October).

Finding 3: In first four months of 2025 combined, the quantity of Canadian travelers arriving in Minnesota was down by 3.5% YoY relative to 2024.

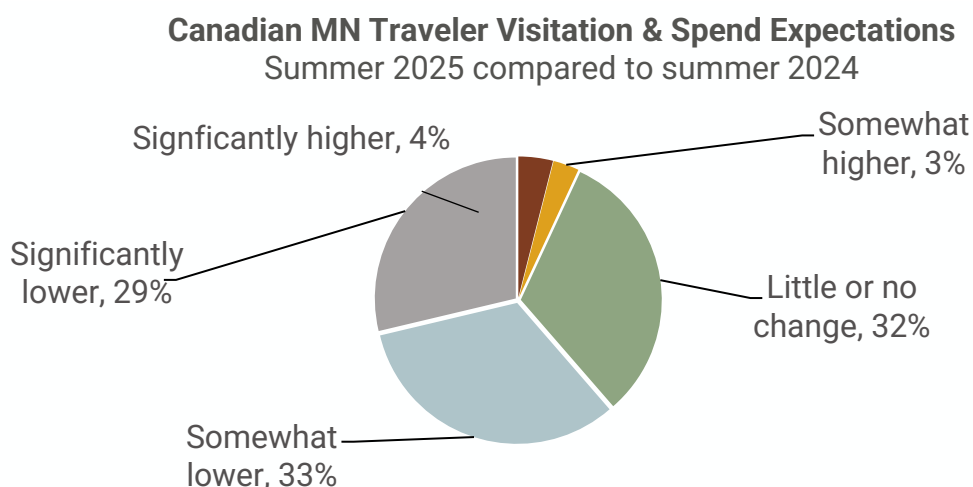


Source: U.S. Customs and Border Protection (CBP)

In 2025 to date, the volume of Canadian travelers coming to Minnesota by air and land is down 3.5% YoY relative to 2024. However, compared to the first four months of 2023, Canadian arrivals in 2025 are up by 14%.

Additionally, according to the Bank of Canada, the Canadian Dollar has declined against the U.S. Dollar since October 2024, primarily due to rising uncertainty around trade policies. In national and local research, Canadian and domestic consumers report concerns about the economy in general, and many are price sensitive.

Finding 4: More than 60% of Minnesota tourism and hospitality businesses expect decreased Canadian traveler business activity this summer.



In EMN’s recent industry survey, Minnesota L&H businesses and DMOs were asked about actualized Canadian customer traffic and spending in the first months of 2025 and their upcoming forecast for summer. For the 2025 year to date, 7% reported significantly or somewhat increased activity, 40% reported activity similar to last year, 32% reported somewhat decreased activity, and 22% reported significantly decreased activity. Looking ahead to summer 2025, expectations for Canadian travel to Minnesota are similar, with 32% of survey respondents expecting little or no change from last year and 62% expecting somewhat or significantly lower Canadian business activity.

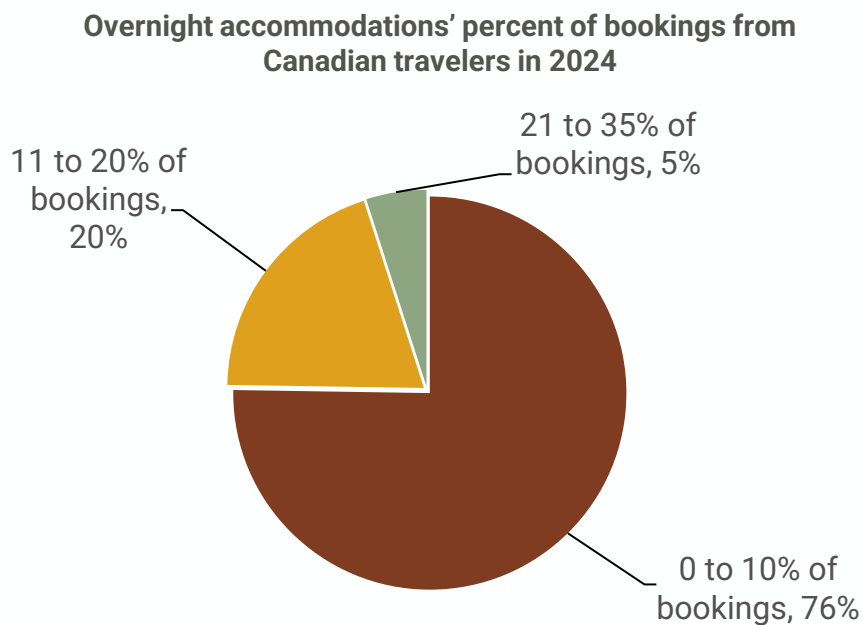
There is variation in Canadian travel summer expectations by business location within the state. Of those who responded to the survey, businesses in Northeast Minnesota and the Minneapolis-St. Paul Metro most frequently reported expectations for somewhat or significantly decreased Canadian business activity this summer. Northwest Minnesota businesses were split between expecting decreased or stable Canadian visitation this summer compared to 2024. Most Central Minnesota businesses expect summer Canadian traveler business activity to be about the same as last year.

In multiple survey comments, respondents described the U.S.-Canadian border situation as “stressful.” One business owner said, “Multiple groups have informed us that there are travel restrictions and strong suggestions not to travel to the US. We have issued refunds to individual travelers afraid to visit the US and cited vandalism of personal vehicles in northern MN as a deterrent.” Another responded, “Many Canadians have shared the sentiment that they love the people and businesses in our area, and they don’t want to hold the decisions of our government against us. Hopefully, that sentiment will continue, but I anticipate that should political sentiment turn even further toward an anti-outsider mentality, and border crossings are increasingly perceived as hostile encounters, Canadian [visitation] will certainly decline.”

In response to a real or expected decrease in Canadian travel or intent, 19% of surveyed tourism and hospitality businesses have made operational or marketing adjustments. In related survey comments, the most frequent explanation was that advertising in Canada has been decreased or paused completely. However, a few survey respondents said they are increasing efforts to welcome Canadians through social media posts in Manitoba and speaking with Canadians they encounter.

Explore Minnesota continues to monitor our campaign efforts in Manitoba and Ontario, specifically in the metro areas of Winnipeg and Thunder Bay. In 2025 to date, Canadian traffic on the EMN consumer website has decreased relative to 2024. Website views are down 42% and site sessions and new users are both down 34%. Additionally, Canadian requests for visitor information packets are down 69% YoY. In late March, after evaluating online sentiment and the return on investment (ROI) of our Canadian campaign spend, EMN decided to pause broadcast and social media placements for our spring 2025 campaign. We continue to monitor sentiment and will make any necessary adjustments as we roll into the summer of 2025.

Finding 5: In the summer of 2024, Canadian travelers either did not frequent or comprised less than 10% of bookings at 76% of Minnesota overnight accommodations.



In the EMN industry survey, overnight accommodations were asked about their share of bookings from Canadian travelers. In the summer of 2024, 76% of overnight accommodations that participated in the survey received 0 to 10% of their bookings from Canadians. Approximately 20% of surveyed accommodations received 11% to 20% of bookings from Canadians and 5% received 21 to 35% of bookings from Canadians. Additionally, several non-overnight accommodation industry businesses, such as food/drink establishments, attractions and entertainment companies, reported that they are unaware of much or even any Canadian visitation.

Overnight accommodations were also asked for additional details about bookings trends. In response, 46% reported that they have experienced cancellation of reservations made in 2024. About 55% have experienced fewer bookings in the first months of 2025, relative to the same time period in 2024. Finally, 25% have seen early indicators that Canadians will spend less on incidentals and other “extras” during their summer 2025 stay.

While considering these booking impacts, it is again important to know that multiple overnight accommodations stated in the survey comments section that they expect no significant business impact in the coming months. Additionally, one respondent explained that they anticipate increased bookings as U.S. travelers are less likely to travel to Canada.