

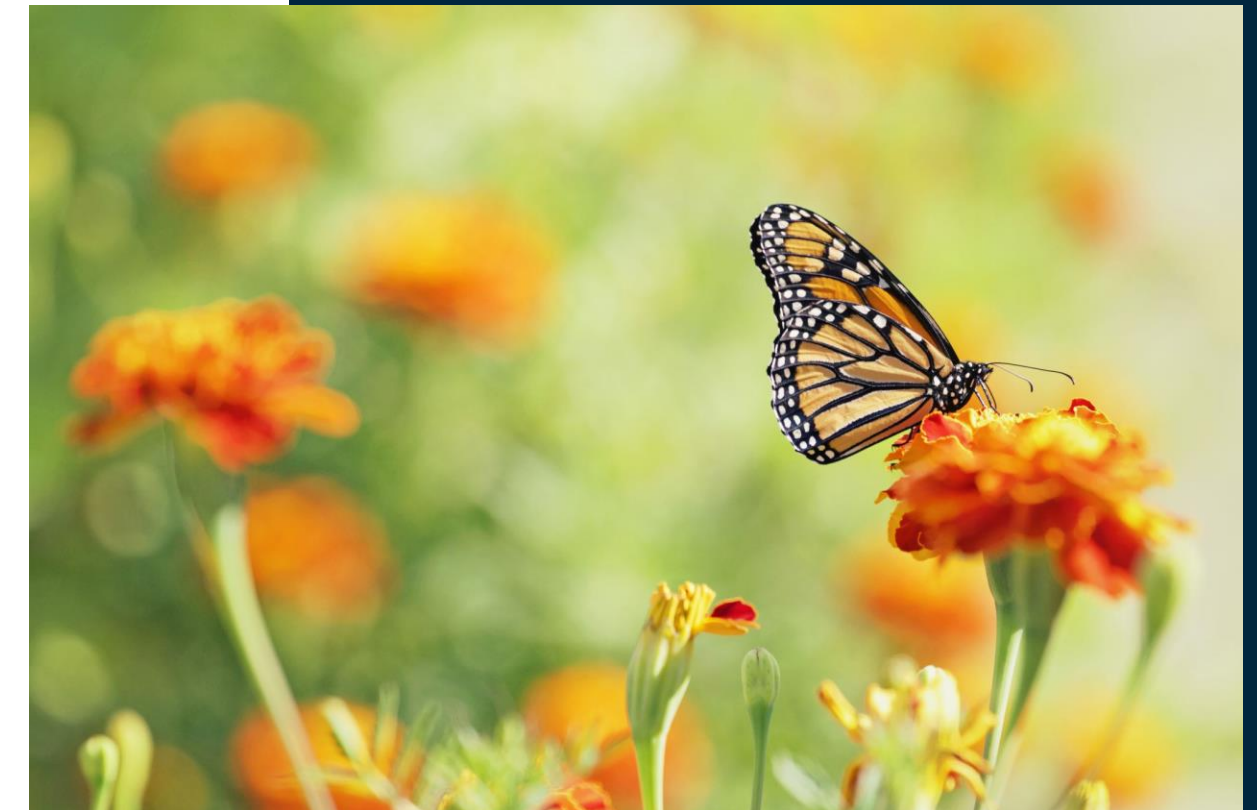


International & Leisure Group Market Development Meeting

July 30, 2025

Agenda

- 2:00 p.m. Introductions
- 2:15 p.m. Research Trends Overview
- 2:30 p.m. Leisure Group Marketing Overview
- FY25 review
 - FY26 strategy and marketing plan
 - Discussion
- 2:50 p.m. International Marketing Overview
- FY25 review
 - FY26 strategy and marketing plan
 - Discussion
- 3:30 p.m. Adjourn





Market Development Team

- Jen Schak, Market Development Manager
- Beth Helle, Deputy Director
- Brenda Maas, Market Development Representative
- Shannon Lukes, Project Coordinator

- Gretchen Nussbaum, Research Analyst



Introductions

- Name
- Title
- Organization
- What are you interested in learning more about?

USA Actions with Global Tourism Implications 2025

1. The administration has imposed new American trade tariffs that will go into effect soon.
2. There have been comments by political leaders that were considered unfavorable to certain countries and people within them.
3. A few international travelers were detained in the USA.

Negative Media Coverage

- Affected International Relations
- Decline in Consumer Sentiment
- Safety Concerns



Research Trends Overview

- **Data sources & international trends**
- **Canadian inbound travel**
- **Overseas visitation**
- **Air travel trends**



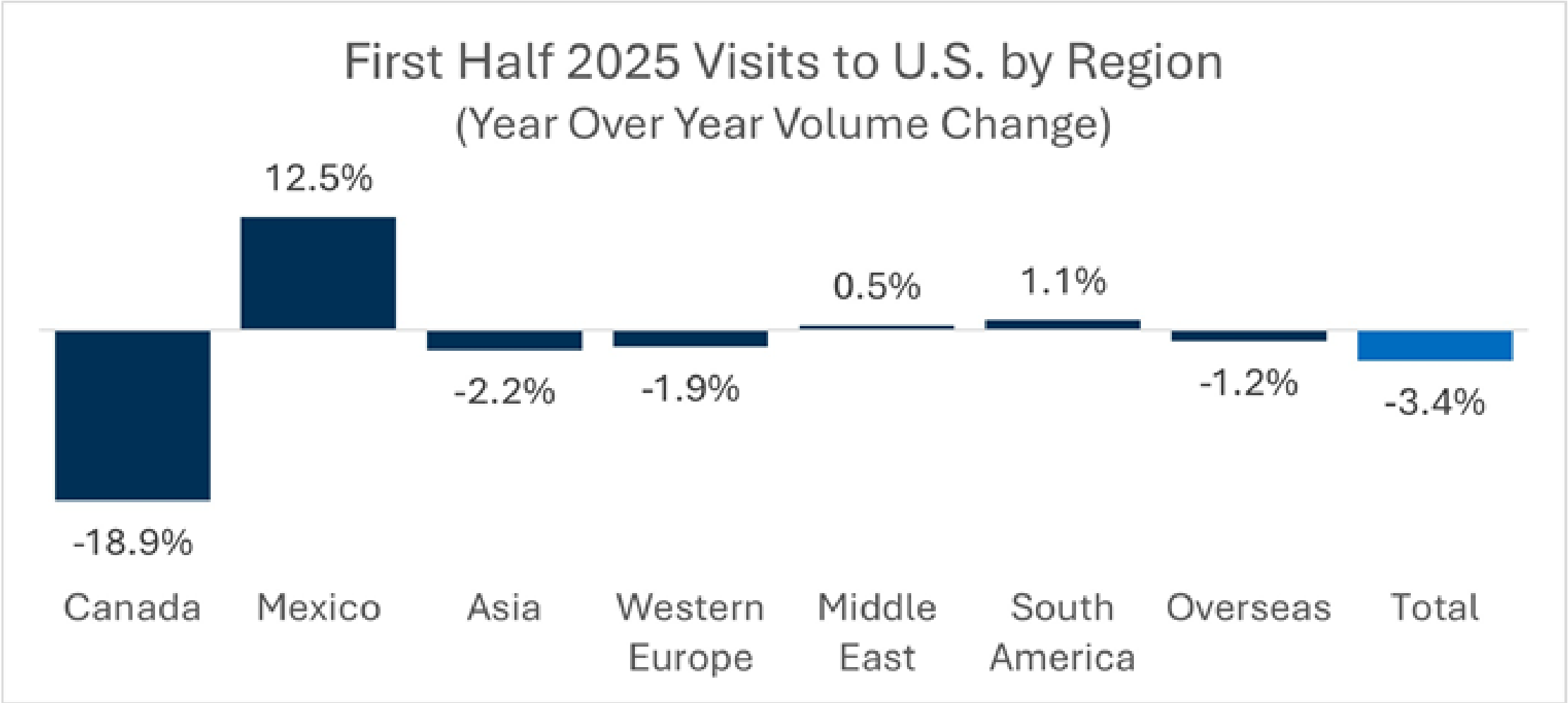
EMN monitors a variety of data and research sources to learn about international and domestic travel trends and health.

- Free public data is available from the MN Dept. of Economic Development, MN Dept. of Natural Resources, MSP Airport Commission and the federal Bureau of Economic Analysis (BEA).
- We purchase data from CoStar, the MN Department of Revenue, Longwoods, MMGY Global and Future Partners and are members of the U.S. Travel Association.
- **Annually, we purchase Minnesota-specific international data from Tourism Economics.** Their analysis is based on multiple data sources including U.S. Customs & Border Protection, the National Trade and Tourism Office, OAG (air travel info.), CoStar-STR and their own propriety data.

U.S. Travel recently shared international inbound data for the first half of 2025. Growth from Mexico offset by sharp declines from Canada. Mostly stable volumes from other Overseas markets.

Amid a rapidly evolving global environment, international visits to the U.S. have been resilient across most markets.

Year to date through June 2025, visits to U.S. from international travelers down 3.4%



**May and June data are preliminary, Source: Department of Commerce, CBP. StatsCan, US Travel Analysis*

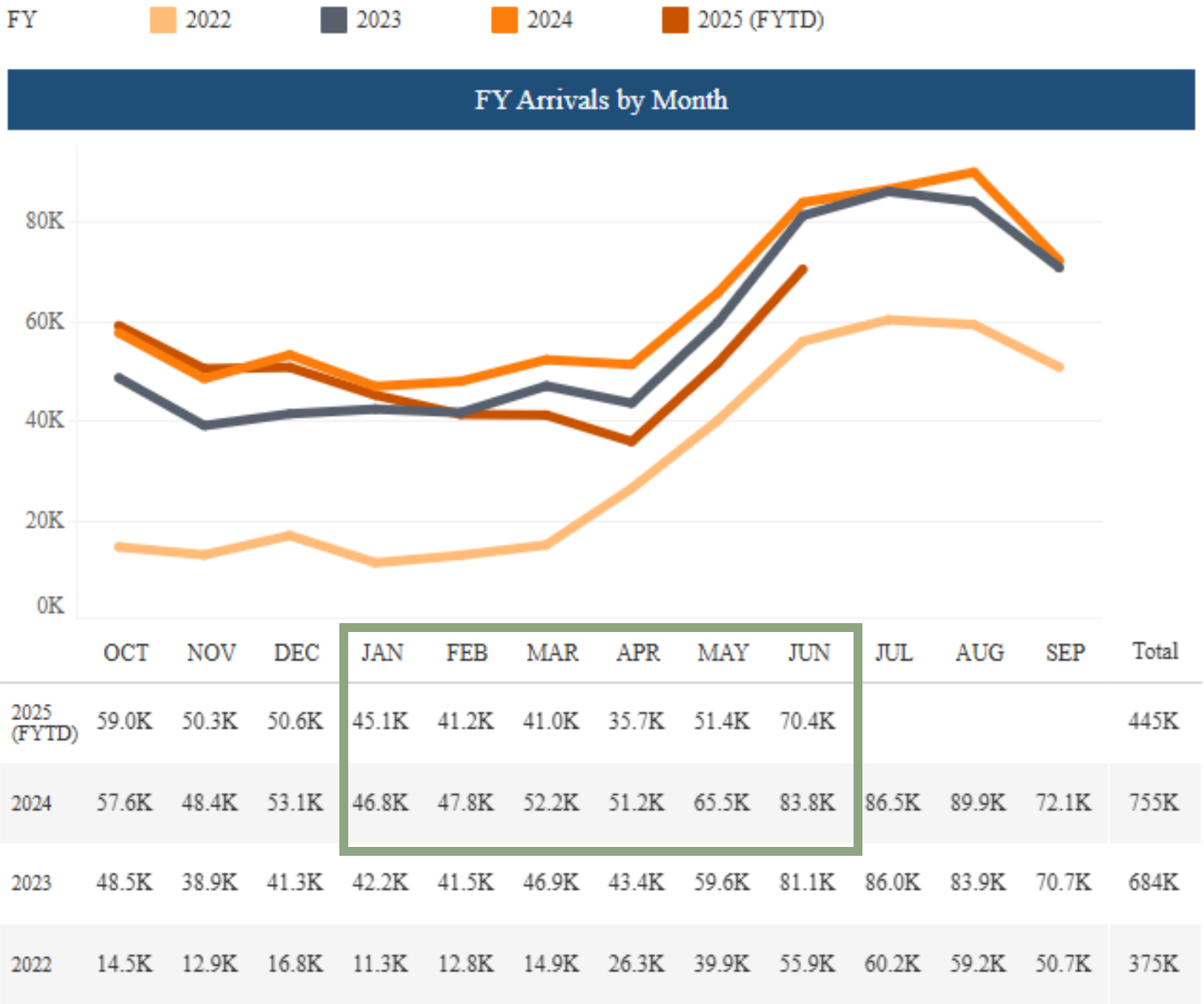


Canadian travel trends

Canadian travel into Minnesota has decreased in the first six months of 2025 relative to 2024.

- January -4% year-over-year (YoY)
- February -14% YoY
- March -21% YoY
- April -30% YoY
- May -22% YoY
- June -16% YoY

Year to date through June, Canadian arrivals to MN down 18% YoY in 2025 relative to 2024



Source: U.S. Customs & Border Protection

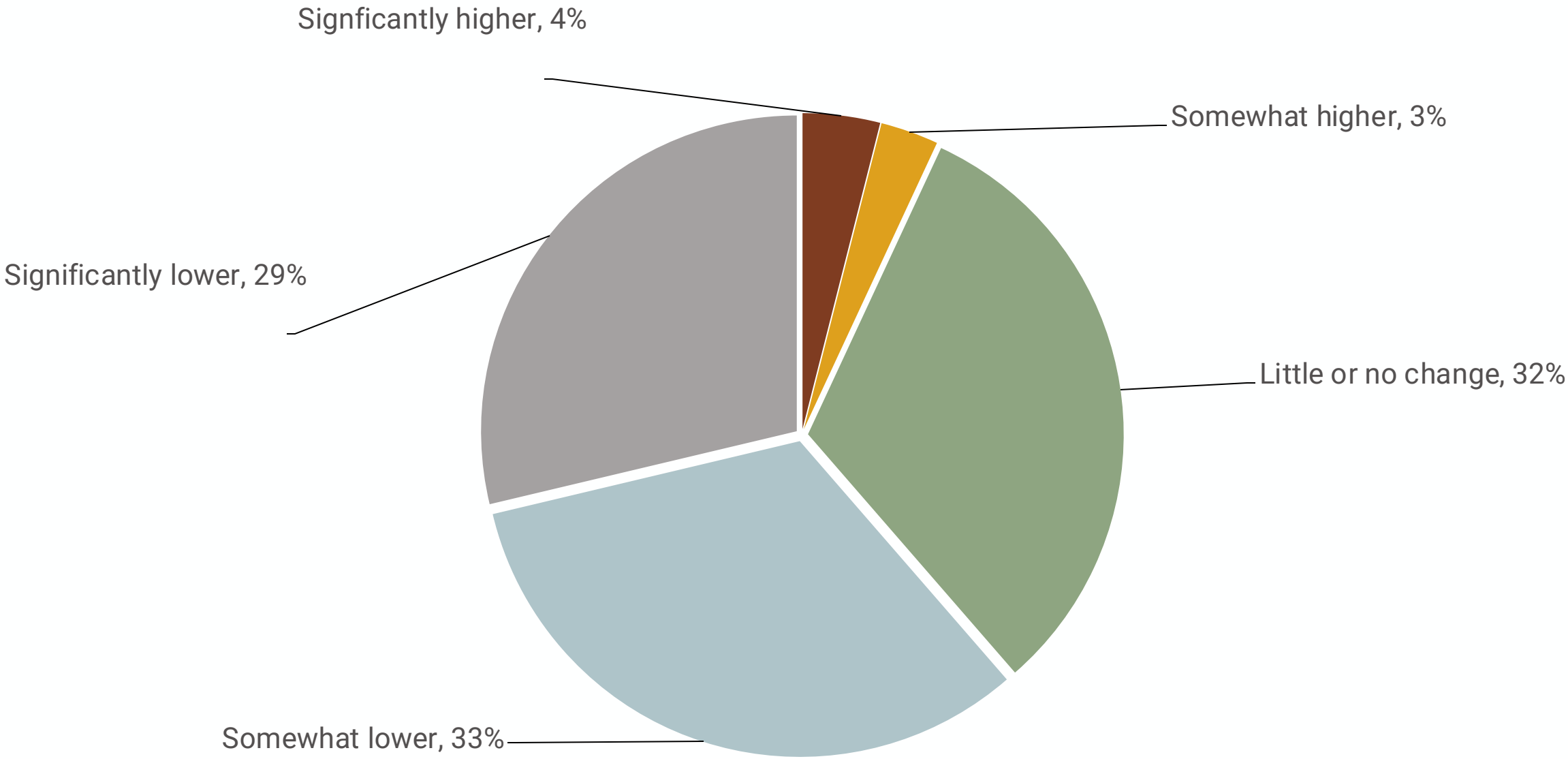
Most businesses reported reduced expectations for Canadian traveler business activity.

There is variation by location within the state—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.

In response to a real or expected decrease in Canadian travel or intent, 19% of MN tourism-focused businesses have made operational or marketing adjustments. Changes include pausing marketing in Canada.

More than 60% of surveyed MN tourism & hospitality businesses expected decreased Canadian traveler business activity this summer

Canadian MN Traveler Visitation & Spend Expectations
Summer 2025 compared to summer 2024



Source: Spring 2025 Explore MN Survey; N=113



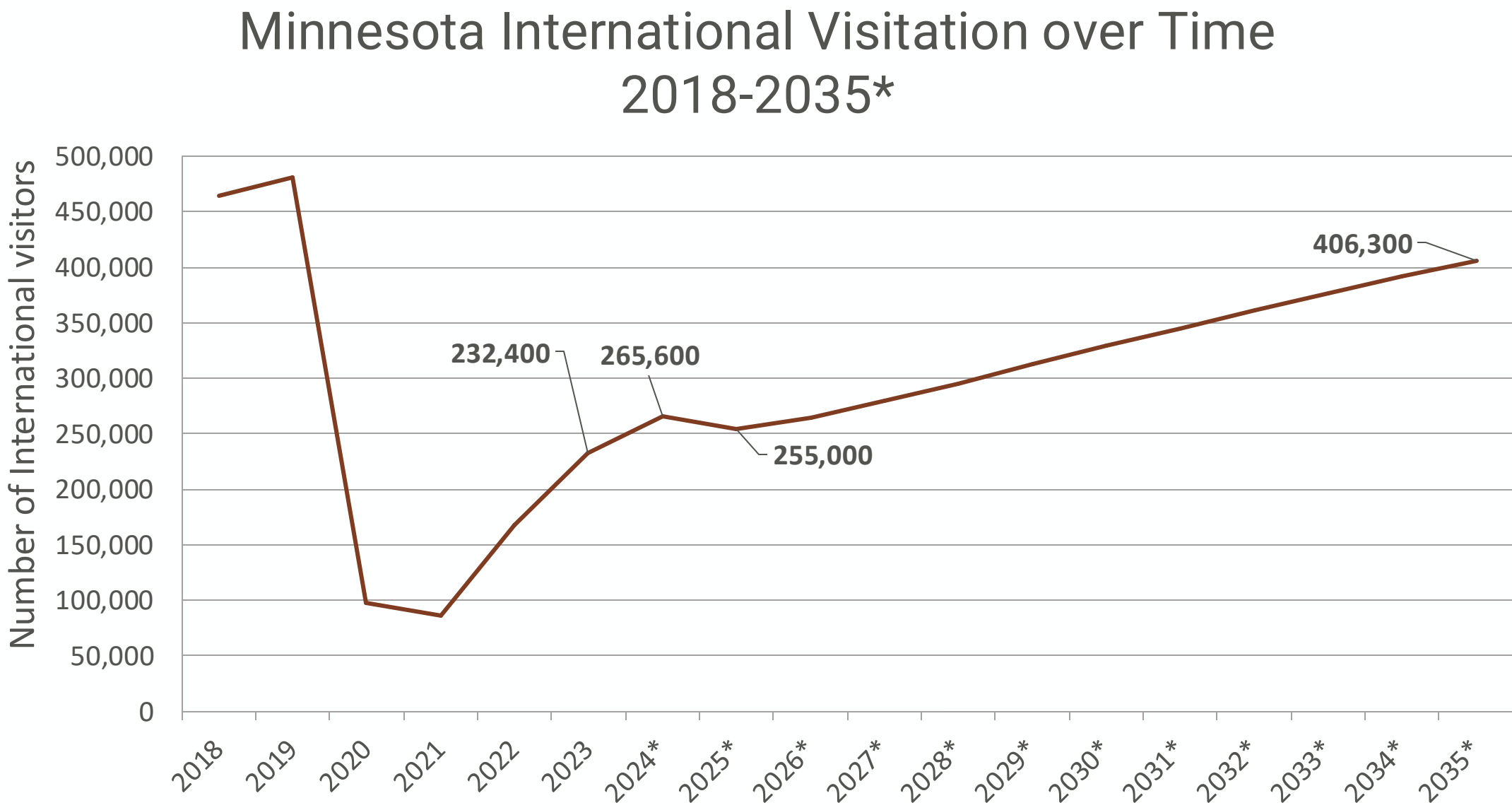
Overseas Visitation Trends

According to Tourism Economics – International States Travel (IST) preliminary data, in 2024 Minnesota’s overseas visitation increased 14% to an estimated 265,600 international arrivals. These visitors spent approximately \$457 million in our state.

In 2025, Minnesota’s overseas visitation is expected to decrease 4% to 255,000.

By 2035, it is expected that Minnesota’s overseas visitation will increase to 406,300.

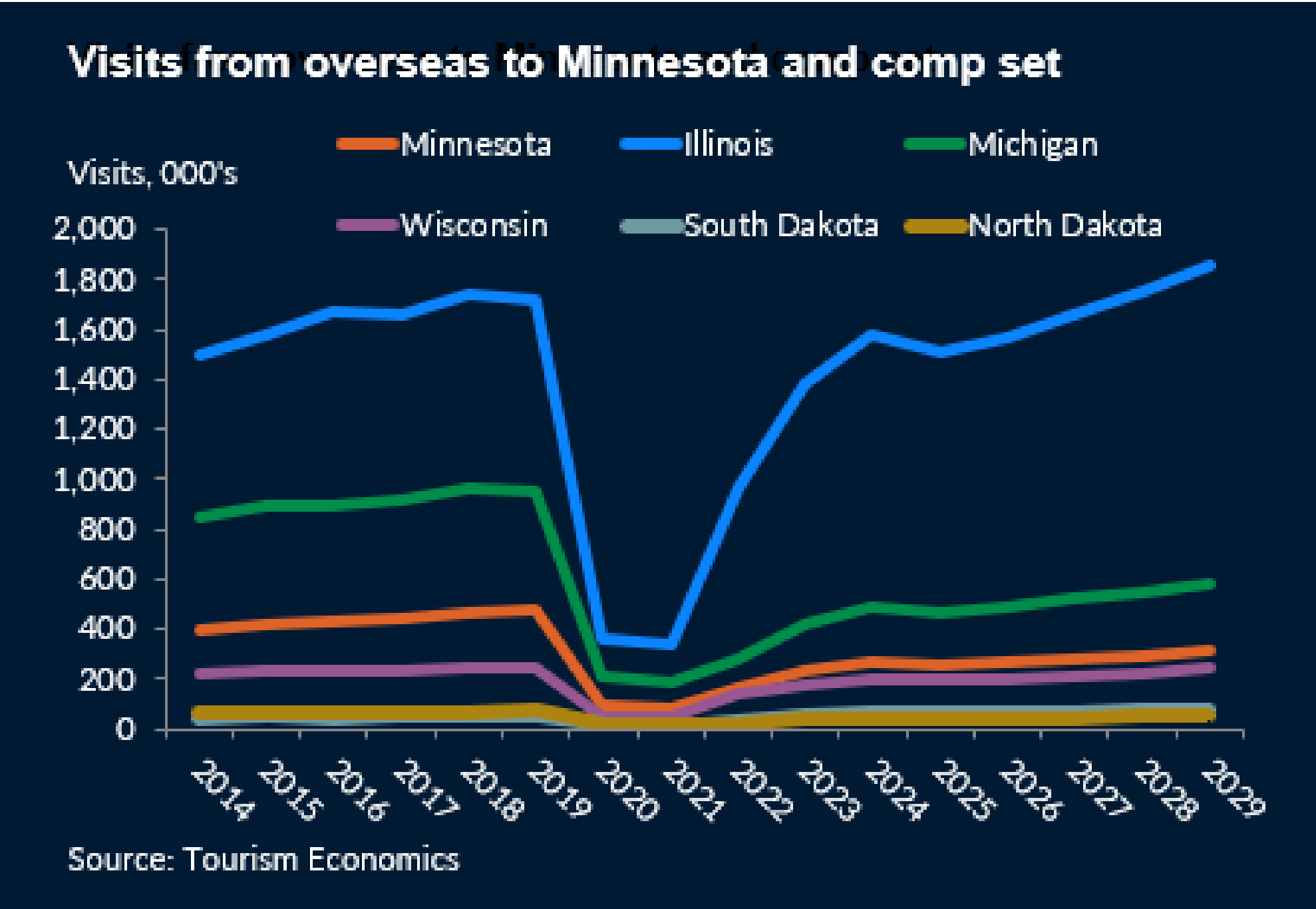
Overseas arrivals to Minnesota are expected to decrease 4% to 255k in 2025



* Preliminary or forecasted data; Final 2024 estimates will be available in fall 2025

Minnesota's 2024 share of international visitation relative to other U.S. states followed recent trends.

In 2024, Minnesota received more international visitors than WI and the Dakotas, and fewer than IL and MI

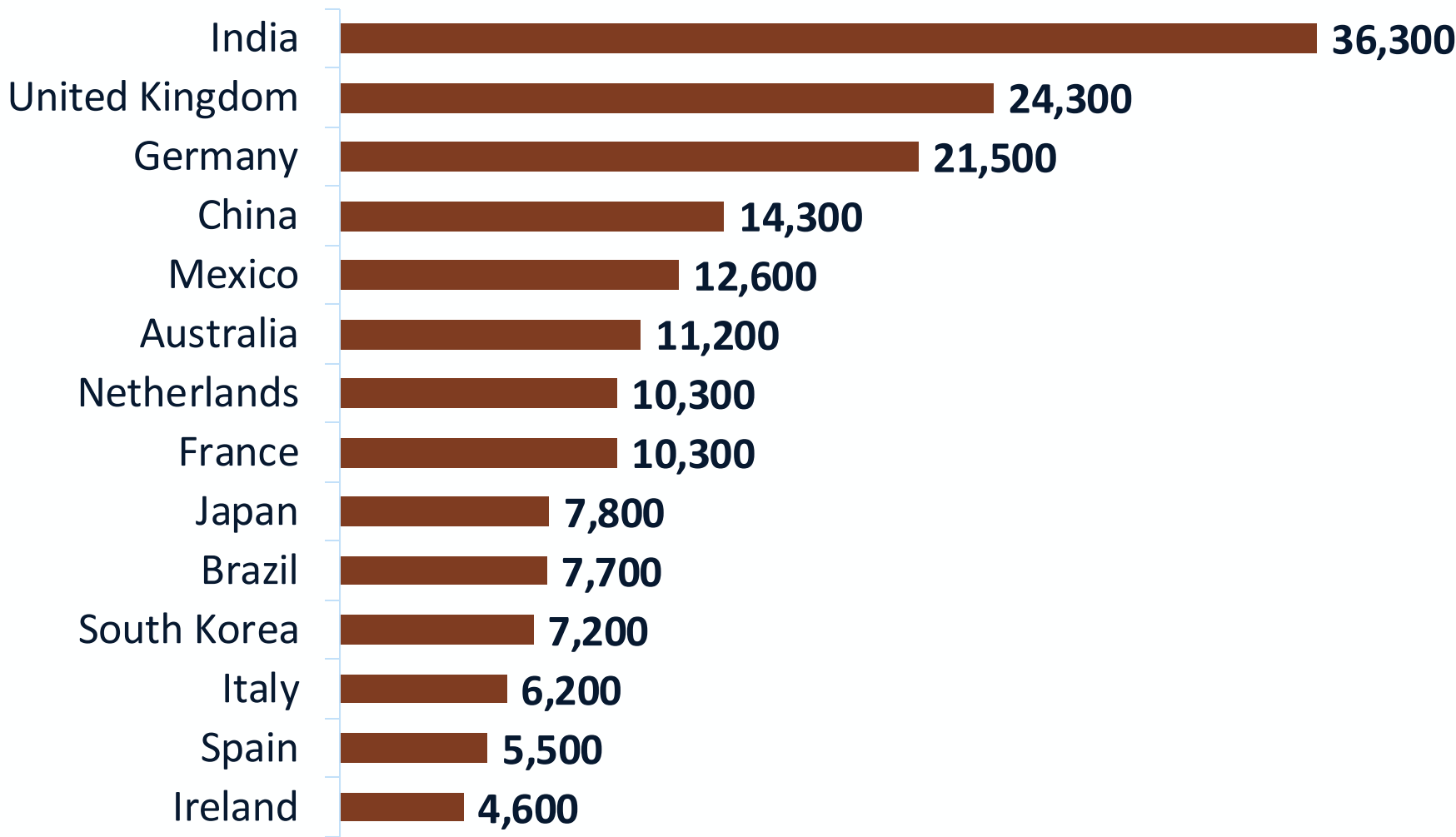


In 2024 India continued as the number one Overseas Minnesota visitor origin market with an estimated 36,300 visitors.

The United Kingdom and Germany are the other top two countries for MN visitation in 2024.

India, the UK and Germany were MN’s top overseas origin markets in 2024

Visits From Top Markets of Origin for Minnesota
2024



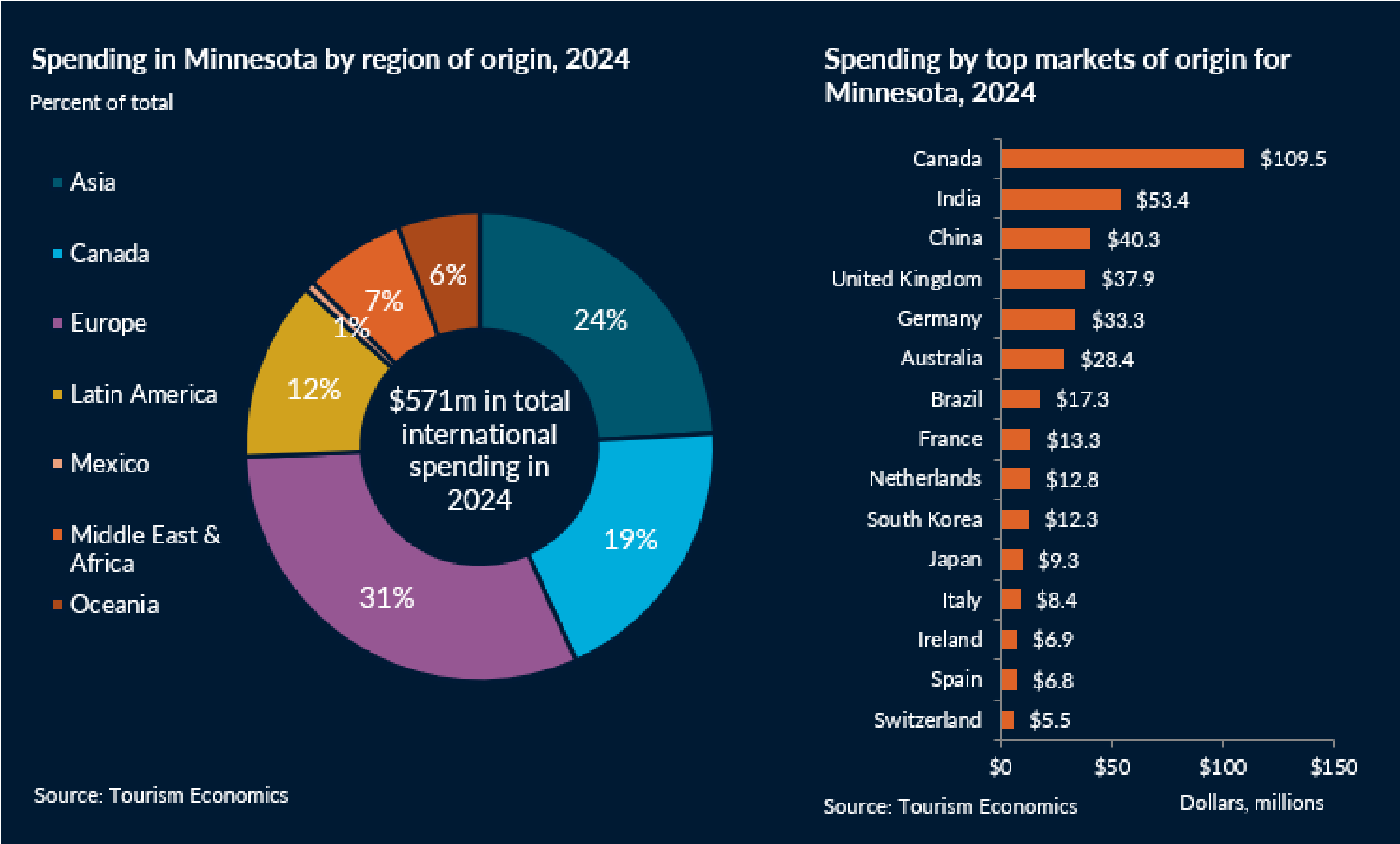
Source: Tourism Economics-International States Travel

According to NTTO, the average overseas travel party coming to the Minnesota spends \$1,848. This is high compared to the approximately \$800 spent by Minnesota’s average domestic travel party per trip.

Also, Minnesota’s visitor volume and spend by origin market do not directly align. For example, while Canadians comprised 55% of non-U.S. visitation, they made up 19% of spend.

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.

Overseas visitors tend to take longer trips and spend more money in Minnesota





Air Travel Trends

MSP airport set a record for international travelers in 2024



2024 KEY STATS:

37.2M international passengers

6.9% increase over 2023

32 international destinations served in 2024

NEW INTERNATIONAL FLIGHTS 2025:

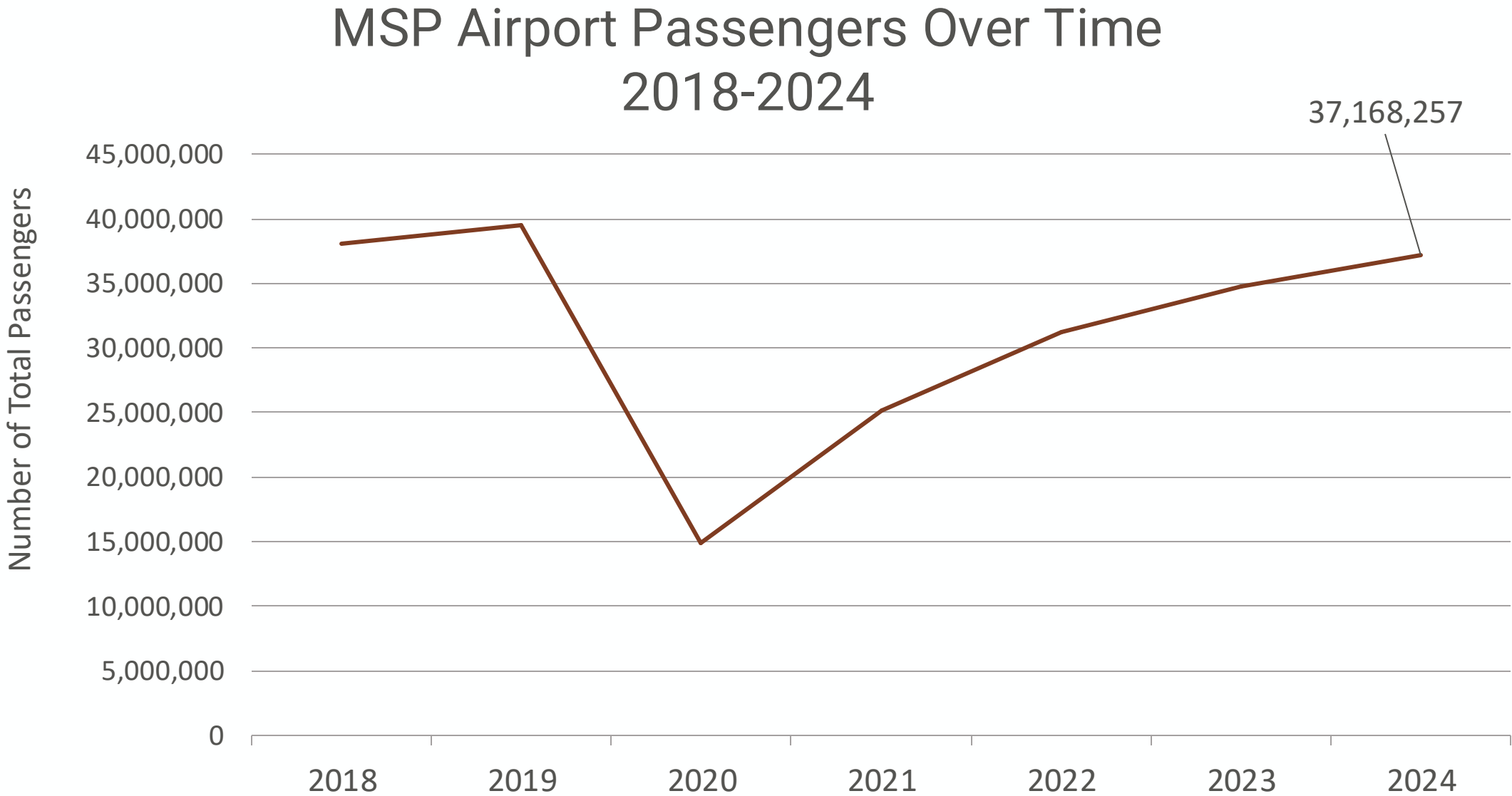
MSP-Copenhagen (3x/week, May-Sept)

MSP-Rome (4x/week May-Oct)

In 2024, the total number of Minneapolis-Saint Paul Airport (MSP) passengers increased 6.9% YoY to 37.2 million.

The 2024 passenger volume remains 6% below the pre-pandemic 2019 MSP passenger volume of 39.6 million.

2024 MSP airport passenger volume increased 6.9% relative to 2023



Source: Minneapolis Saint Paul Metropolitan Airports Commission



Take Aways

- Declining sentiment is having an impact on international travel to the U.S., including Minnesota.
 - Minnesota's visitation from Canada appears to be the most impacted.
 - Explore Minnesota will continue to monitor and report on trends.
- Attracting international visitors to Minnesota is important.
 - Overseas visitors spend more per trip than domestic visitors.
 - MSP airport is a strong gateway that makes it easy to visit our state.

Discussion/Questions





Leisure Group Marketing

USA & Canada



2025 in Review – Memberships

- National Tour Association (NTA)
- American Bus Association (ABA)
- U.S. Travel Association
 - *Group Travel Network Member*



2025 in Review – Trade Shows

- National Tour Association (NTA) - Travel Exchange
 - November 17-21, 2024; Huntsville, AL
 - 15 Leads
- American Bus Association (ABA) - Marketplace
 - February 1-4, 2025; Philadelphia, PA
 - 37 Leads
- Circle Wisconsin - Midwest Marketplace
 - April 6-8, 2025; Dubuque, Iowa
 - 35 Leads



2025 in Review – Advertising

- *Group Tour Magazine*
 - November 2024 issue; Minnesota feature
- *Destinations Magazine*
 - February 2025 issue (ABA Convention)
 - Nearly 14,000 pub page views/5K users
 - 11,230 print distribution
 - May/June 2025 issue
 - Nearly 7,000 pub page views/353 users
 - 11,230 print distribution



2025 in Review – Recovery Grant Funding

- August 15 – reports are due. A few group efforts!

2025 in Review – Education

- Explore Minnesota Tourism Conference – *The Changing Face of Group Travel* with Dr. Maree Forbes Gaughn



Goals:

- Maintain visibility and awareness of Minnesota as a group leisure travel destination.
- Increase the number of leisure groups traveling to Minnesota.

Audience:

- Professional Planners and Recreational Planners
 - Advertisers are expanding their audiences



Strategy:

Inspire leisure travel professionals and recreational group planners in the USA and Canada to bring their clients to Minnesota by increasing awareness through group memberships, proactive communications, and paid marketing tactics focused on Minnesota's unique natural assets, events and group-friendly attractions.

Objectives:

1. Reengage professional planners and influence them to consider Minnesota.
2. Make it easy for recreational group planners to plan their group travel.
3. Support Minnesota destinations and attractions to attract more group business.

Marketing Plan



- Memberships
 - National Tour Association (NTA)
 - American Bus Association (ABA)
 - U.S. Travel Association
 - *Group Travel Network Member*
- Trade Shows
 - American Bus Association Marketplace
 - January 10-13, 2026; Reno, Nevada
 - Circle Wisconsin Midwest Marketplace
 - April 19-21, 2026; La Crosse, WI
 - Leads are available to you!
- Advertising
 - Leisure Group Travel Magazine
 - October 2025 issue; Minnesota feature – Co-op opportunity!
 - Article with focus on the Minnesota Music Experience

MINNESOTA

SPECIAL SECTION IN OCTOBER'S LEISURE GROUP TRAVEL
RESERVE YOUR SPACE BY AUGUST 15

LEISURE

GROUP TRAVEL

JOIN THE OCTOBER MINNESOTA SPECIAL SECTION

Showcase your unforgettable group experiences in the *Minnesota Special Section*, featured in October's *Leisure Group Travel*. Developed in partnership with Explore Minnesota's editorial direction and negotiated rates. Your special section highlights the North Star State's most group-friendly destinations—from scenic lake towns and cultural gems to vibrant cities and natural wonders.

Whether it's fall foliage tours, historic landmarks, outdoor adventure or iconic festivals, let your destination shine with authentic Minnesota charm. Plan confidently with ideas that cater to planners seeking fresh, memorable, and hassle-free group adventures.



RESERVE SPACE BY AUGUST 15

Joining is easy – simply complete
the form and email
to Tom Tobiason
at Tom@ptmgroups.com,
or Call Tom at 630-248-0686

BE PART OF THIS EXCEPTIONAL OPPORTUNITY

- ✓ Mailed with October's Leisure Group Travel to 12,000 subscribers including tour operators, bank travel clubs, senior, affinity and religious groups.
- ✓ Year-round digital promotion via e-newsletter subscribers and social media followers to leisure, reunions, religious and student groups
- ✓ Digital edition featured on LeisureGroupTravel.com
- ✓ Professionally written and SEO driven editorial and content pieces by the industry's most experienced team.
- ✓ Completely integrated advertising packages (print + digital + social) Ask me for more info.

PLEASE CHECK YOUR CHOICE

<input type="checkbox"/> SIZE	MN RATES	Ad Space Deadline: 8/15/25
<input type="checkbox"/> Two-Page Spread Fp ad & itinerary	\$5,295	
<input type="checkbox"/> Full-page	\$4,895	AD Materials Deadline: 8/22/25
<input type="checkbox"/> Half-page	\$3,495	
<input checked="" type="checkbox"/> Itinerary	\$3,295	Publish and Billing Date: October 2025
<input type="checkbox"/> Third-page	\$2,295	
<input type="checkbox"/> Sixth-page	\$1,195	

► These negotiated Minnesota rates honored through August 2026 Leisure Group Travel editions.

Company:

Contact:

Address:

City, State, ZIP:

Email:

Phone:

Total:

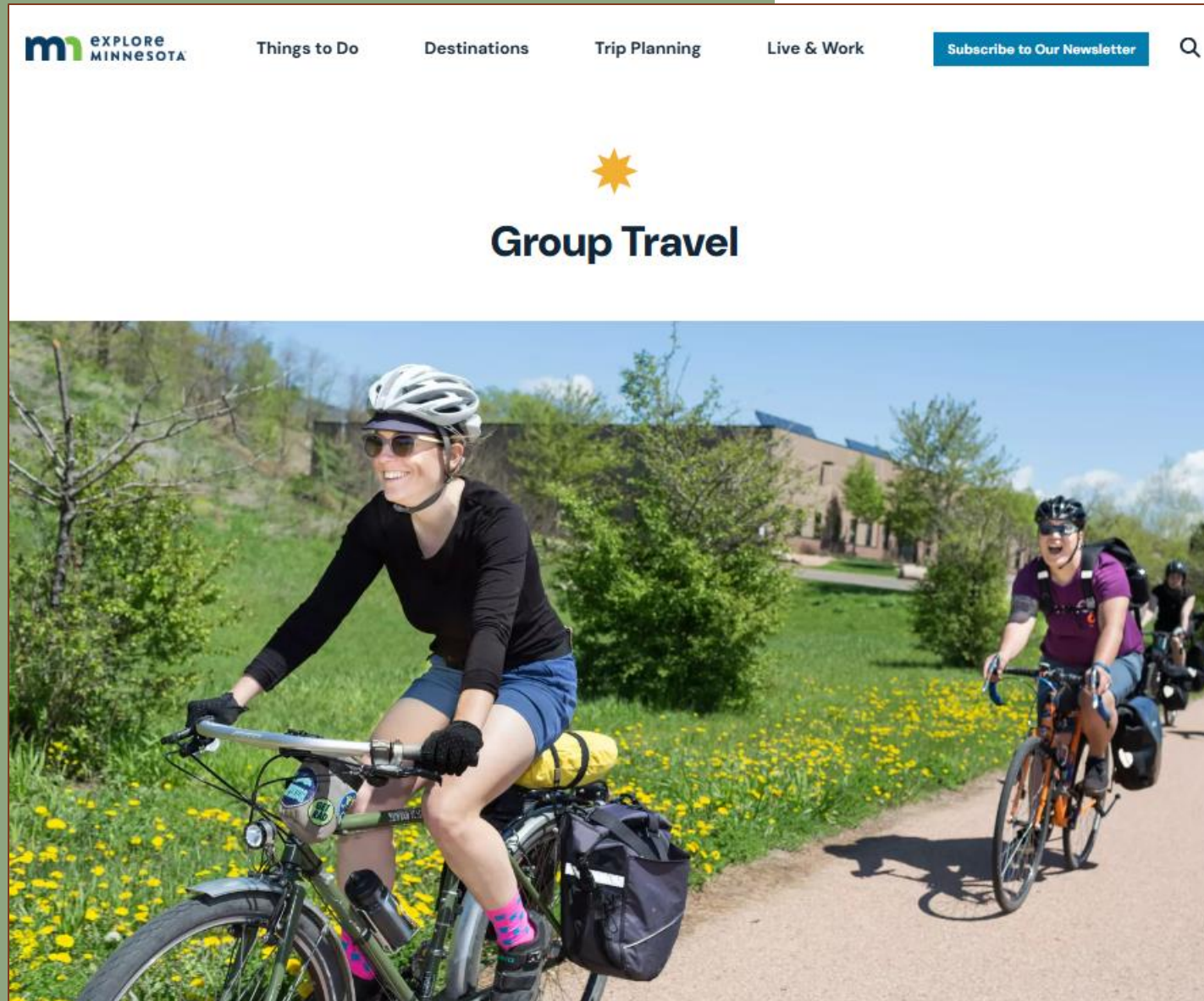
Signature:

Date:

By signing this insertion order you agree to our terms and conditions. View online at <https://ptmgroups.com/terms-conditions>.



Leisure Group Travel is a Premier Travel Media brand • PtmGroups.com



Marketing Plan

- Public Relations
 - Article in ABA Destinations Magazine on an article highlighting milestone anniversaries in 2025.
 - Build contact lists and target publications.
- Explore MN Website *Refresh*
 - Better search capability and an updated look
 - Group Travel added under Trip Planning
 - *Coming*, Group Travel Section - Develop and add additional resources and planning tools to ExploreMinnesota.com/group-travel
- Tourism Grants
 - Funding can be used to support your group business!



Marketing Plan

- Content Creation
 - Video
 - Photos
- *Considering* - Group Travel Planner FAM



Look Ahead

- | | |
|--------------------|--|
| August | Article in ABA Destinations Magazine
Worked with Pamela Brossman, Senior Editor, on an article highlighting milestone anniversaries in 2025. |
| September | Website, Group Travel Upgrade
Refreshed design, plus added content and embedded design. |
| October | Leisure Group Travel Magazine, MN Special Section
Full page Ad & Advertorial. |
| October | U.S. Travel Association, Group Market Meeting
Meet with other state DMO's to discuss the U.S. group market. |
| Jan. 10–13 | American Bus Association's Marketplace
Meet with North American tour operators and planners in pre-scheduled one-on-one appointments. |
| April 19–21 | Circle Wisconsin Midwest Marketplace
Meet with Midwest tour operators and planners in pre-scheduled one-on-one appointments. |

Discussion/Questions

How can we support you?
More coop advertising for groups?
Help develop unique group experiences?





International Marketing

2025 in Review

- Trade

- Oct., Brand USA Travel Week Trade Show, London, 40 meetings & leads
- Oct., Brand USA South Korea Travel Agent Megafam, 10 travel agents
- **Nov., International Representation Training**
- Jan., Brand USA India Sales Mission, Hyderabad, 72 meetings & leads.
- **June, U.S. Travel's IPW, Chicago**
90 meetings & leads

- Memberships

- 9 Visit USA Committees
- U.S. Travel Association
- International Inbound Travel Association (IITA)
- International Gay & Lesbian Travel Association (IGLTA)

- Advertising

- Oct., MN Vikings vs. NY Jets in London, U.K. | Aired :30 spots during the live broadcast throughout the U.K.

- Media

- August, Verena Wolf, dpa German FAM
- Oct., Great Lakes Press FAM, Germany | American Journal (Duluth, Ely Twin Cities)
- June, RonReizen, Media FAM
- May, Columbus Travel Media FAM
- June, Wideoyster Media FAM
- **June, U.S. Travel's IPW, Chicago, 44 meetings**
- **June, Mississippi River Country, FAM, Minnesota/Wisconsin/Illinois**
- PR Newsletter

- Marketing Partnerships

- Great Lakes USA (GLUSA): UK, Germany
- Mississippi River Country (MRC): Japan, Canada
- Great America West (GAW): MSPB Gateway Cities
- **Brand USA (BUSA): National DMO**

Primary Market 25 Summary

Germany

- 9 Marketing Programs, RMI
- Great Lakes USA Brochure
- Brand USA Brochure
- Great Lakes USA Press Trip, American Journal
- Verena Wolf, dpa German FAM

United Kingdom & Ireland

- 5 Marketing Programs, RMI
- Great Lakes USA Brochure
- Brand USA Brochure
- Brand USA Travel Week, London
- Commercials Around Vikings Game

Nordics (Norway, Sweden, Finland, Denmark, Iceland)

- 5 Marketing Programs, RMI
 - Paused social on March 5
 - Paused FDM TO campaign, Denmark

France

- 2 Marketing Programs, RMI
- Brand USA Digital Campaign w/Expedia

Benelux (Belgium, Netherlands, Lusemburg)

- 5 Marketing Program, RMI
- RonReizen, Media FAM
- Columbus Travel Media FAM
- Wideoyster Media FAM

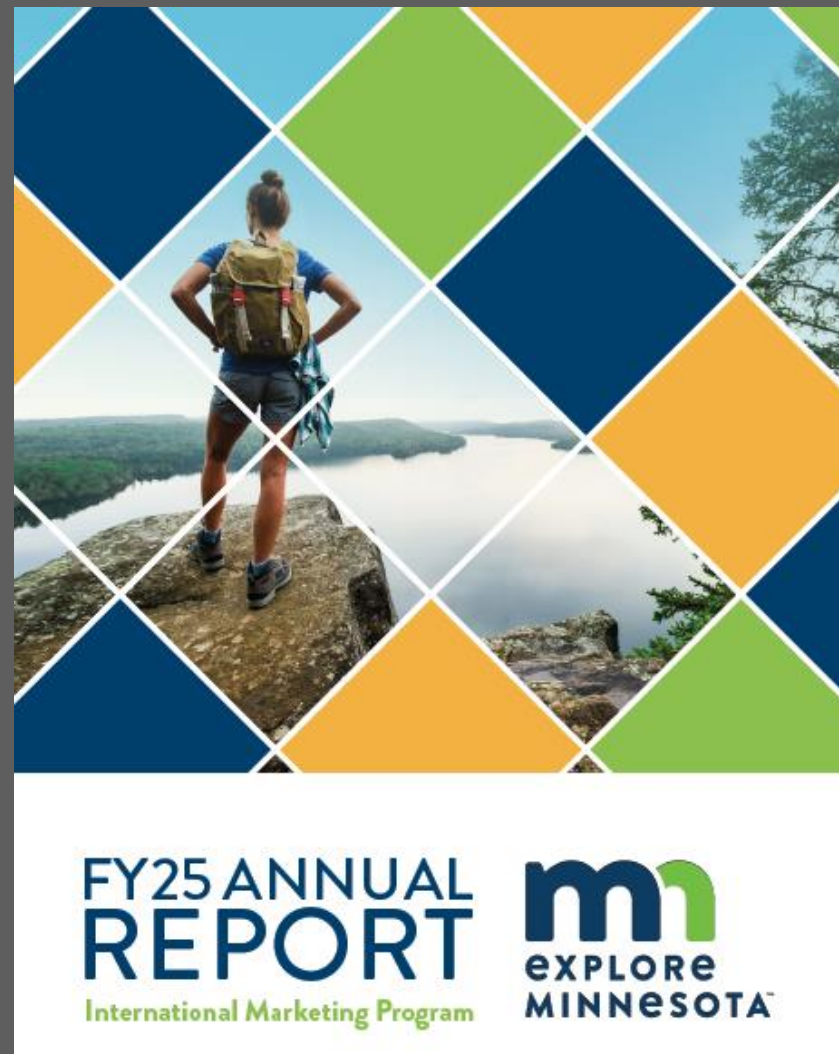
Italy

- 3 Marketing Programs, RMI
- PR Event with Delta, new Rome flight launch
- Great American West Partnership, Gateway



Secondary Market 25 Summary

- India
 - Brand USA Sales Mission
 - W/Mississippi River Country / Brand USA Digital Campaign w/Expedia
- Japan
 - Mississippi River Country Mission, Tourism Expo/w Media
 - Brand USA Digital Campaign w/Expedia
- South Korea
 - Brand USA FAM, Travel Agents
- Australia
 - Great American West Partnership, Gateway
- China



33
**Marketing
Projects
Completed**



RMI FY25 Summary

Annual Report

Six International Markets with a mix of marketing tactics to inspire, educate and encourage bookings.

- 6 Primary Markets
- Advertising, Media & Trade

Marketing Mix

- Television broadcast
- Out of home promotions
- Print editorial and advertising
- Social media promotions
- Newsletter distribution
- Digital marketing campaigns
- Hosting trade and media familiarization tours



FY25 Results

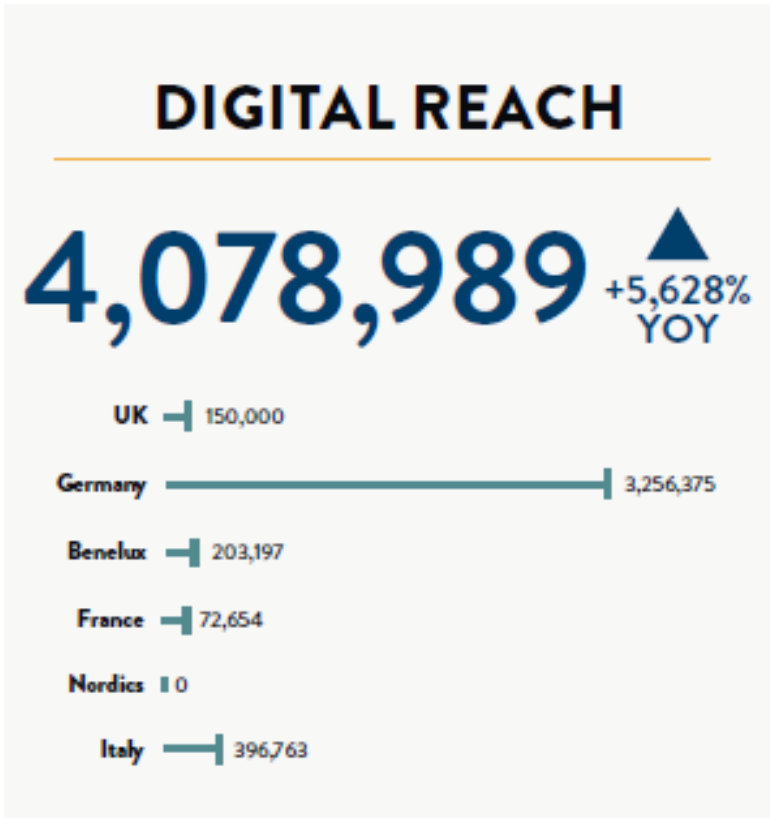
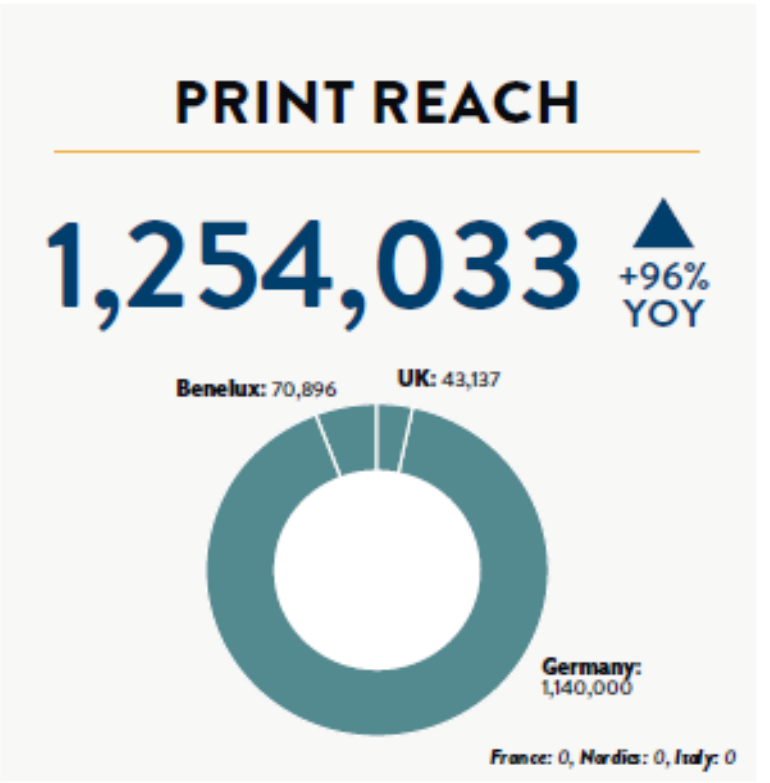


What worked

- Paid & Earned Media
 - Hosted FAMs
 - BBC Wildlife
 - Lonely Planet
- Trade Development
 - 119 TOs selling MN
 - 28 new itineraries
 - Trade shows

Waiting on ...

- Brand USA Expedia Campaigns
- Media FAM Articles



Goal

Increase consumer and trade awareness of Minnesota as a must-see travel destination.

Increase visitation to Minnesota from target markets.

Strategy

Inspire consumers in targeted international markets to visit Minnesota through global memberships, cooperative marketing partnerships, and innovative marketing and unique storytelling focused on Minnesota's unique natural assets, art and culture.



FY26 Strategy Adjustments



1. Split Year Planning
 - July – December & January – June
2. Communications Strategy
 - Proactive approach to media outreach
 - New, monthly international media & trade newsletter
3. Continue Global Memberships & Partnerships
 - Brand USA, Significant Decrease in Funding
 - Less investment, conservative approach
4. Focused on Target Markets
 - Denmark is struggling the most
5. Tour Operator Campaigns w/Big Players
 - In select markets, the second ½ of the year



Target Primary Markets

High yield, high arrivals, mature markets. Historical interest in traveling to Minnesota and a developed tourism industry supporting it: flight routes, tour operators and travel agents, and bookable product.

- Germany
- United Kingdom & Ireland
- Benelux (Belgium, Netherlands, Luxembourg)
- Nordics (Norway, Sweden, Finland, Denmark, Iceland)
- France
- Italy

Direct Flights:

- Amsterdam, Netherlands
- Frankfurt, Germany
- London, United Kingdom
- Dublin, Ireland
- Paris, France
- Reykjavik, Iceland
- Copenhagen, Denmark - New
- Rome, Italy - New

Canada

- Consumer marketing campaigns & domestic strategy.
 - Thunder Bay, Winnipeg and the surrounding areas of Manitoba
- Mississippi River Country Partnership, **no longer/India**



Target Secondary Markets

Important arrivals markets into Minnesota. Closely monitoring developments and growth:

- India
- Australia
- China
- Japan
- South Korea

Direct Flights:

- Tokyo, Japan
- Seoul, South Korea



Top Experiences/Themes

Natural Assets, Arts & Culture

- MSP City Break/Stopover
 - Mall of America
 - Art & Culture
 - Music – Prince & Bob Dylan
 - Sports
- Mississippi River
- Lake Superior
- Voyageurs National Park
- Boundary Waters Canoe Area Wilderness
- Wildlife – Eagle, Black Bear, Loon, Wolf, Moose
- Native American Culture

Produced on Behalf of Explore Minnesota
Produced by RMI on July 29, 2025

2025 RMI TRIP REPORT™



International Travel Data
2025 Product Audit & 2024 Booking Report

The How

1. Utilize Experts
 - RMI (International Agency of Record)
 - Audience
 - Marketing Mix
 - Content & Product
 - Research
2. Make Data Driven Decisions
 - IST, U.S. Travel, Brand USA, RMI TRIP Report & other authority networks.
 - Identify best opportunity markets/seasons & trends
3. Partner with Allies
 - Minnesota Industry
 - Global Memberships
 - Cooperative Marketing Partnerships

Program Budget Overview

FY26	Proposed	\$875,000
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RMI Agency of Record	47%
Other Marketing & FAMs	19%
Tradeshows & Meetings	13%
Memberships	10%
Brand USA Marketing	6%
Other	5%



GLOBAL MEMBERSHIPS

Visit USA Committee Memberships

- Visit USA Australia
- Visit USA Belgium
- Visit USA France
- Visit USA Germany
- Visit USA Ireland
- Visit USA Italy
- Visit USA Netherlands
- Visit USA UK
- Discover America Nordic
 - Benefits – Marketing & communications, extended reach, training & education

Association Memberships

- U.S. Travel Association
 - International Market
 - Group Market
- International Inbound Travel Association (IITA)
- International Gay & Lesbian Travel Association (IGLTA)
 - Benefits – Data, trends, statistics, training & education



COOPERATIVE MARKETING PARTNERSHIPS

Great Lakes USA (GLUSA): UK, Germany

- **New Director**, Sally Davis Berry
- Lauren Bennett McGinty, Chair
- Representation; printed guides, websites
- Cruise the Great Lakes coalition: website

Mississippi River Country (MRC): Japan, India

- New market – India
- Representation; web sites; Japanese guide

Great America West (GAW): MSPB Gateway Cities

- State supported membership; representation in target European countries + Australia

Brand USA (BUSA): National DMO

- Printed guides; travel trade training; websites
- Brand USA Travel Week (UK)

Primary Market Summary

July – Dec.

Germany

- 2 Marketing Programs, RMI
- Great Lakes USA Brochure
- *Brand USA* Travel Agent FAM,
 - This is a multistate itinerary for MN, WI, and IL. It will focus on the Twin Cities and the Mississippi River. Working with Southwest Adventure Tours.

United Kingdom & Ireland

- 2 Marketing Programs, RMI
- Great Lakes USA Brochure
- *Brand USA* Travel Week Show in London

Benelux (Belgium, Netherlands, Luxemburg)

- 1 Marketing Programs, RMI

Nordics (Norway, Sweden, Finland, Denmark, Iceland)

- 3 Marketing Programs, RMI

Italy

- 2 Marketing Programs, RMI
- Great American West Partnership, Gateway

France

- 2 Marketing Programs, RMI





Secondary Market Summary

July – Dec.

- India
 - Increase budget commitment & new in country representation
- Australia
 - Great American West Partnership, Gateway
- Japan
 - Mississippi River Country Mission – You can join!
- South Korea
- China

JAPAN

**MEDIA & TRAVEL TRADE
SALES MISSION**
Tokyo & Osaka, Japan
October 3-10, 2025

ABOUT

- Tokyo events include sales calls with Japan's largest travel agencies, travel industry seminar/workshop & a brunch meeting with travel media
 - Media event in U.S. Pavilion at 2025 World Expo in Osaka
- *See more details on opposite side

COST

\$5,000 per participant*
\$3,000 per additional
participant/state*

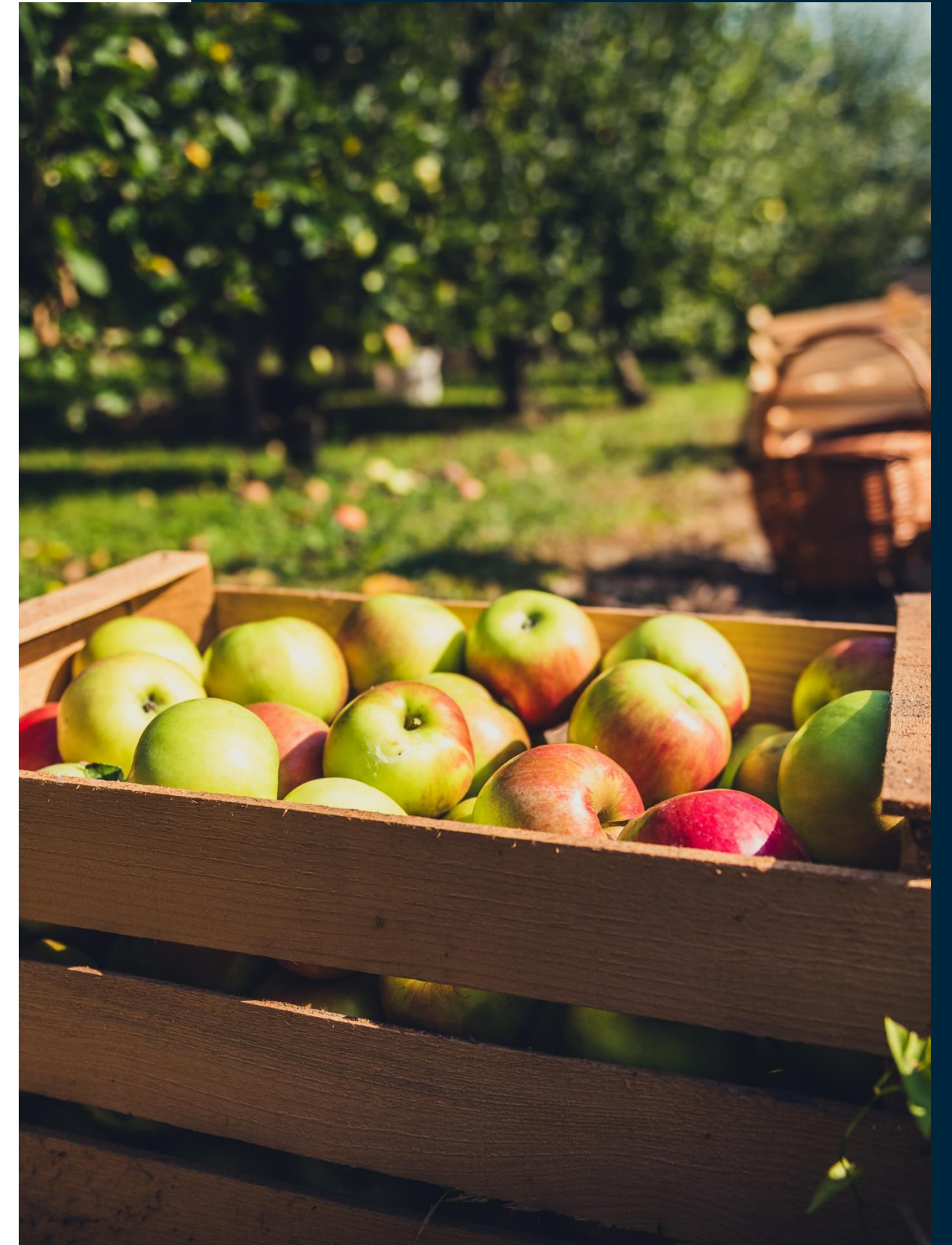
More Than One Market

Monthly Trade & PR Newsletter

U.S. Travel's IPW

Marketing Rep and Trade Training

New Opportunities.....





Look Ahead

Sept.	International Trade & Media Newsletter
Sept. 23–26	Brand USA German Travel Agent Megafam This is a multistate itinerary for MN, WI, and IL. It will focus on the Twin Cities and the Mississippi River
Oct.	International Trade & Media Newsletter
Oct. 20–23	Brand USA Travel Week, London B2B pre-scheduled meetings with U.K. and European tour operators and partners
Nov.	International Trade & Media Newsletter
Nov. 11	U.S. Travel Association, International Market Meeting Meet with state DMOs and discuss the international market.
Dec.	International Trade & Media Newsletter
Jan. 18-23	India Mission w/Brand USA, Mississippi River Country
May 18–20	U.S. Travel’s IPW, Fort Lauderdale Meet with new and established partners.

Reminders

- **Take the destination development [survey](#) by 8.22**
 - Cooperative Marketing & Memberships
 - Group Tour Marketing
 - Trade Shows & Lead Sharing
 - International Consumer Marketing
 - International Media
 - Trade and Media FAMs
- **[Subscribe](#) to industry updates email**
 - International and Group Leads
 - Education & Webinars
 - Great Lakes USA – [International Receptive Operators](#), Aug. 14, 1 p.m.
- **Get to know your industry representative ([directory](#))**
 - Northeast – Derek Ramthun
 - Northwest and Central – Kari Brumback
 - Southern – Lisa Havelka
 - Metro – Hiring! Nicole Lalum
- **Save the Date, Explore MN Tourism [Conference](#)**
 - Wed. Feb. 11 – Thu. Feb. 12, 2026 | Duluth



Discussion/Questions



Thank you!