

TOURISM & MINNESOTA'S ECONOMY

Economic Impact: Sales and Jobs

Travel/tourism in Minnesota generates:

SALES

- \$15.0 billion in gross sales
- \$41 million a day

JOBS

- More than 265,000 full- and part-time jobs
- 11% of total private sector employment
- \$5.4 billion in wages

REVENUE

- \$969 million in state sales tax
- 18% of state sales tax revenues

Note: Data for leisure & hospitality sector, 2016

International Travel to Minnesota

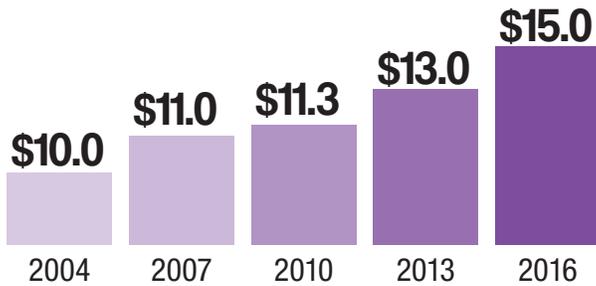
Minnesota's appeal as a travel destination extends across the globe, including:

- 524,000 Canadian travelers on overnight trips
- 292,000 additional international travelers from other countries

Note: Canadian estimate is for 2016; estimate for other countries is 2014-2016 annual average

Growth in the Tourism Industry

Sales at leisure and hospitality businesses grew 50% from 2004 to 2016, including 3.7% annual growth for 2016.



Leisure & Hospitality Gross Sales (in billions) 2004-2016

Impacts of State Tourism Advertising

- 3.3 million Minnesota trips
- \$383.9 million traveler spending
- \$36.9 million direct state and local taxes
- 2.30 million additional intended trips in next 12 months
- \$92 to \$1 traveler spending return on ad investment
- \$9 to \$1 state and local tax return on ad investment

Note: Impacts of Explore Minnesota's spring/summer 2017 advertising

Minnesota Ranking Among States

The economic impact of travel & tourism in Minnesota ranks significantly higher compared to other states in:

Traveler Spending	22nd
Travel-Generated Employment	18th
Travel-Generated Payroll	16th
Travel-Generated Tax Receipts	9th

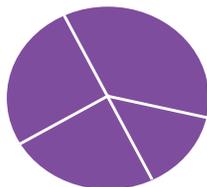
Traveler Expenditures by Season

Winter (Dec-March)

24%

Fall (Sept-Nov)

25%



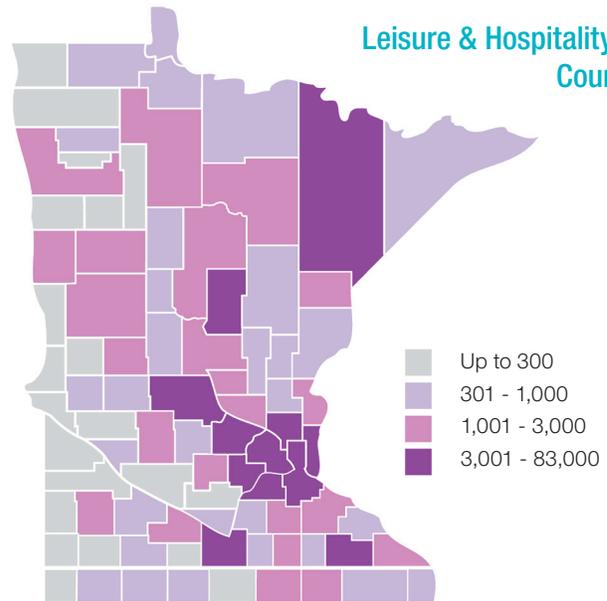
Summer (June-Aug)

37%

Spring (April-May)

14%

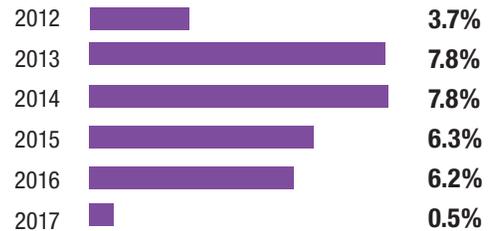
Leisure & Hospitality Jobs by County, 2016



- Travel & tourism creates jobs and generates sales in every county of Minnesota.
- Tourism jobs represent all levels of employment, from important entry-level service jobs to high-paying executive positions.
- Traveler spending indirectly supports jobs in many other industries, as well, from financial services to printing.

Increase in Room Revenue

Source: STR, Inc.



Following several years of strong growth, 2017 room revenue at Minnesota lodging properties was dampened by a combination of strong room supply growth and an accompanying annual decline in average room rates.

Traveler Spending by Sector

Spending during Minnesota's 71 million annual person-trips (including overnight and day trips) is distributed throughout the economy:

Food	Lodging	Retail
24%	21%	17%
Transportation	Recreation	Second Homes
16%	16%	6%

Find more information at: industry.exploreminnesota.com

Sources: Minnesota 2017 Tourism Advertising Evaluation, Longwoods International; The Economic Impact of 2015 Travel in Minnesota, Tourism Economics; The Economic Impact of Expenditures by Travelers on Minnesota, June 2007-May 2008, Davidson-Peterson Associates; Minnesota Department of Revenue, 2016; Minnesota Department of Employment and Economic Development, 2016; Bureau of Labor Statistics; U.S. Travel Association; U.S. Department of Commerce, National Travel and Tourism Office, 2014-2016; Statistics Canada, 2016.

ECONOMIC IMPACT BY COUNTY

MINNESOTA'S LEISURE AND HOSPITALITY INDUSTRY, 2016

County	Gross Sales	State Sales Tax	Private Sector Employment
MINNEAPOLIS-ST. PAUL AREA			
Anoka	\$589,422,703	\$39,661,889	12,835
Carver	\$211,387,278	\$14,213,251	4,544
Chisago	\$66,846,776	\$4,438,835	1,644
Dakota	\$895,165,376	\$59,361,650	18,543
Hennepin	\$5,181,172,559	\$338,943,883	82,873
Isanti	\$37,884,254	\$2,562,723	896
Ramsey	\$2,123,286,402	\$137,760,445	28,598
Scott	\$388,809,648	\$21,807,483	6,042
Washington	\$550,132,838	\$36,848,283	11,400
Wright	\$232,544,630	\$13,421,303	4,887
Region Total	\$10,276,652,464	\$669,019,745	172,262
NORTHEAST REGION			
Carlton	\$67,895,747	\$4,021,070	1,096
Cook	\$69,731,576	\$4,437,174	959
Itasca	\$74,443,609	\$4,840,471	1,573
Kanabec	\$15,606,236	\$1,035,977	353
Koochiching	\$31,367,249	\$2,024,442	577
Lake	\$41,083,654	\$2,737,952	794
Pine	\$75,601,233	\$4,153,647	905
St Louis	\$557,653,416	\$37,559,492	10,889
Region Total	\$933,382,720	\$60,810,225	17,146
SOUTHERN REGION			
Big Stone	\$4,843,606	\$345,133	118
Blue Earth	\$200,118,361	\$13,032,592	4,186
Brown	\$42,455,258	\$2,834,847	1,186
Chippewa	\$15,678,108	\$1,083,407	390
Cottonwood	\$10,478,366	\$729,865	302
Dodge	\$12,284,994	\$882,540	426
Faribault	\$10,703,002	\$746,944	291
Fillmore	\$20,623,408	\$1,388,909	649
Freeborn	\$44,362,799	\$2,959,959	1,020
Goodhue	\$74,720,707	\$5,160,305	1,842
Houston	\$13,250,616	\$865,155	320
Jackson	\$11,520,638	\$776,454	347
Lac Qui Parle	\$4,434,331	\$313,862	96
Le Sueur	\$29,122,394	\$1,920,015	593
Lincoln	\$3,909,682	\$296,037	129
Lyon	\$50,994,074	\$3,299,156	1,278
Martin	\$37,371,449	\$2,506,915	862
Mower	\$53,884,306	\$3,613,712	1,203
Murray	\$8,111,793	\$557,258	176
Nicollet	\$37,758,404	\$2,598,690	906
Nobles	\$28,259,794	\$1,952,943	622
Olmsted	\$487,499,010	\$32,293,673	8,725
Pipestone	\$10,902,904	\$770,465	291
Redwood	\$25,753,308	\$1,815,887	388
Renville	\$7,719,432	\$547,675	228
Rice	\$149,565,603	\$6,981,209	2,323
Rock	\$10,715,679	\$750,133	274
Sibley	\$8,220,315	\$603,747	205
Steele	\$75,539,491	\$4,751,275	1,620
Swift	\$9,349,358	\$658,331	219
Traverse	\$1,873,938	\$126,306	NA
Wabasha	\$26,604,776	\$1,779,149	695
Waseca	\$16,285,196	\$1,096,789	430
Watonwan	\$7,698,041	\$517,960	208
Winona	\$103,347,747	\$7,050,763	2,348
Yellow Medicine	\$14,530,374	\$643,280	228
Region Total	\$1,670,491,262	\$108,251,340	35,124

County	Gross Sales	State Sales Tax	Private Sector Employment
CENTRAL REGION			
Aitkin	\$23,285,974	\$1,559,170	524
Benton	\$57,978,818	\$3,913,425	1209
Crow Wing	\$230,841,780	\$14,306,951	4048
Douglas	\$105,934,849	\$7,041,381	2257
Grant	\$3,492,878	\$228,258	47
Kandiyohi	\$95,307,447	\$6,216,885	1733
McLeod	\$46,325,469	\$3,161,040	1271
Meeker	\$18,227,569	\$1,232,848	446
Mille Lacs	\$54,460,722	\$2,982,857	927
Morrison	\$45,729,409	\$3,126,514	1104
Otter Tail	\$95,459,127	\$6,359,357	2095
Pope	\$15,231,660	\$1,031,226	303
Sherburne	\$98,147,525	\$6,511,212	2359
Stearns	\$323,489,649	\$21,916,809	7724
Stevens	\$17,678,493	\$1,046,002	386
Todd	\$21,036,145	\$1,441,411	355
Wadena	\$16,814,396	\$1,143,232	373
Region Total	\$1,269,441,910	\$83,218,578	27,161
NORTHWEST REGION			
Becker	\$69,719,709	\$4,570,867	1,656
Beltrami	\$98,605,717	\$6,471,400	2,258
Cass	\$119,906,699	\$7,318,189	1,987
Clay	\$89,797,177	\$5,676,970	1,914
Clearwater	\$7,433,757	\$506,904	213
Hubbard	\$35,258,636	\$2,427,195	779
Kittson	\$3,063,563	\$181,094	66
Lake of the Woods	\$36,010,299	\$1,984,386	486
Mahnomen	\$14,036,448	\$1,001,225	104
Marshall	\$4,833,404	\$373,100	114
Norman	\$3,508,792	\$231,637	72
Pennington	\$24,639,522	\$1,715,322	572
Polk	\$50,354,149	\$3,200,698	1,093
Red Lake	\$2,438,117	\$177,882	75
Roseau	\$16,784,202	\$1,089,813	374
Wilkin	\$3,740,289	\$279,886	109
Region Total	\$580,130,480	\$37,206,568	11,872
MINNESOTA TOTAL	\$14,953,217,775	\$969,455,205	265,160

Notes: State total does not equal the sum of counties or regions because some data is withheld to avoid disclosure of individual businesses; and some state level data is for businesses located outside of Minnesota. The Leisure and Hospitality industry consists of Accommodations; Food Services and Drinking Places; and Arts, Entertainment and Recreation.

Sources: Minnesota Department of Revenue; Minnesota Department of Employment and Economic Development

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