

## ANNUAL ECONOMIC IMPACT, 2009

Travel/tourism in Minnesota generates:

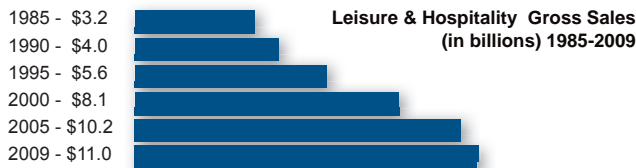
- \$11.0 billion in leisure & hospitality gross sales
- \$3.9 billion in wages
- \$699 million in state sales tax

## CONTRIBUTING TO THE ECONOMY

- Travel & tourism creates jobs and generates sales in virtually every county of the state.
- Travelers in Minnesota spend more than \$33 million a day.
- Travel & tourism has a positive economic impact on a wide variety of businesses, from financial services to printing, and from museums to car rentals, supporting Main Street businesses across the state.
- The leisure and hospitality industry accounts for 17% of Minnesota's state sales tax revenues.
- Tourism is comparable to agriculture in its contributions to the gross state product.

## GROWTH IN THE TOURISM INDUSTRY

Sales at leisure and hospitality businesses grew 36% from 2000 to 2009



## RETURN ON INVESTMENT

Every \$1 invested in state tourism marketing returns an estimated:

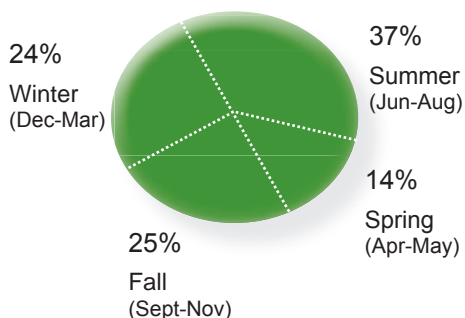
- \$4.60 in state and local taxes
- \$20.40 in wages
- \$53 in gross sales

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

### Minnesota Ranking Among States

State Tourism Office Budget	28th
Traveler Spending	22nd
Travel-Generated Employment	18th
Travel-Generated Payroll	14th
Travel-Generated Tax Receipts	9th

## TRAVELER EXPENDITURES BY SEASON

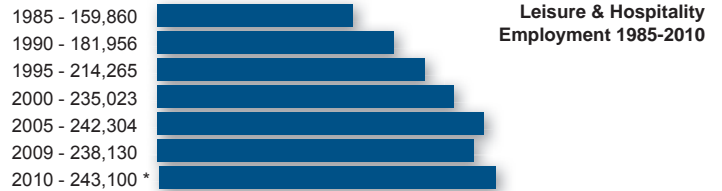


## TOURISM EMPLOYMENT

Tourism means jobs in communities across Minnesota. The leisure and hospitality industry accounts for:

- 243,100 full- and part-time jobs \*
- 11% of the state's total private sector employment.

## GROWTH IN LEISURE & HOSPITALITY JOBS

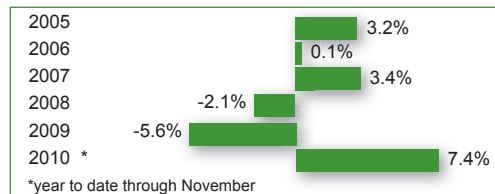


\* Projected

- Leisure and hospitality employment was up 2% in 2010 over 2009
- Leisure and hospitality has been among Minnesota's top industries for job growth coming out of the recession.
- Minnesota's leisure and hospitality job growth ranked 5th in the nation, with 245,300 jobs in November 2010, a 4.5% increase over November 2009. (Minneapolis/St. Paul Business Journal)

## CHANGE IN MINNESOTA LODGING DEMAND (Rooms Sold)

Source: STR (Smith Travel Research, Inc.)



Demand for rooms at Minnesota lodging properties bounced back substantially in 2010, reflecting an increase in business and leisure travel.

## TRAVELER SPENDING BY SECTOR

Spending during Minnesota's 39 million annual person-visits is distributed throughout the economy:

- Shopping 25%
- Recreation 25%
- Food 24%
- Lodging 14%
- Transportation 12%

Information for the tourism industry, including additional research reports and information on state tourism marketing programs, is available at: [www.industry.exploreminnesota.com](http://www.industry.exploreminnesota.com)

Sources: Explore Minnesota Tourism, spring/summer 2000; The Economic Impact of Expenditures by Travelers on Minnesota, June 2007-May 2008, Davidson-Peterson Associates; Minnesota Department of Revenue, 2009; Minnesota Department of Employment and Economic Development, 2009; Bureau of Labor Statistics; U.S. Travel Association.

## ECONOMIC IMPACT BY COUNTY

### Minnesota's Leisure and Hospitality Industry, 2009

	Gross Sales	State Sales Tax	Jobs		Gross Sales	State Sales Tax	Jobs
<b>Minneapolis - Saint Paul Area</b>				<b>Southern Minnesota</b>			
Anoka	\$427,594,545	\$28,658,527	11,059	Big Stone	\$3,860,842	\$259,567	134
Carver	\$129,089,147	\$8,307,240	3,317	Blue Earth	\$149,890,259	\$9,251,546	3,650
Chisago	\$48,943,340	\$3,115,928	1,437	Brown	\$32,704,571	\$2,118,633	1,219
Dakota	\$691,805,820	\$44,558,862	15,937	Chippewa	\$14,477,746	\$985,232	372
Hennepin	\$3,611,000,337	\$230,884,297	72,299	Cottonwood	\$8,037,461	\$521,901	294
Isanti	\$30,936,390	\$2,102,830	832	Dodge	\$12,870,995	\$766,619	361
Ramsey	\$1,631,511,171	\$104,133,535	26,926	Faribault	\$9,665,830	\$649,108	354
Scott	\$252,637,666	\$15,522,862	5,649	Fillmore	\$19,586,689	\$1,322,576	561
Washington	\$376,894,653	\$24,379,270	9,478	Freeborn	\$40,715,679	\$2,691,409	1,031
Wright	\$146,097,997	\$8,730,557	4,283	Goodhue	\$64,976,150	\$4,337,594	1,826
<b>Region Total</b>	<b>\$ 7,346,511,066</b>	<b>\$470,393,908</b>	<b>151,217</b>	Houston	\$9,849,023	\$684,938	290
<b>Central Minnesota</b>				Jackson	\$9,196,783	\$567,475	334
Aitkin	\$19,692,353	\$1,341,999	562	Lac Qui Parle	\$3,767,870	\$246,507	96
Benton	\$46,317,612	\$3,087,361	1,170	Le Sueur	\$20,956,561	\$1,327,478	522
Crow Wing	\$183,854,232	\$11,290,691	3,772	Lincoln	\$3,347,940	\$242,064	104
Douglas	\$91,084,882	\$5,899,891	2,147	Lyon	\$66,699,482	\$2,642,517	1,227
Grant	\$3,675,382	\$253,225	65	Martin	\$27,110,889	\$1,757,170	834
Kandiyohi	\$65,761,894	\$4,049,579	1,621	Mower	\$52,240,952	\$3,131,463	1,314
McLeod	\$35,284,732	\$2,412,029	1,144	Murray	\$7,585,436	\$513,628	188
Meeker	\$14,956,312	\$990,154	415	Nicollet	\$32,306,774	\$2,208,198	953
Mille Lacs	\$42,476,615	\$2,267,822	834	Nobles	\$24,623,287	\$1,641,562	851
Morrison	\$34,219,694	\$2,316,916	1,017	Olmsted	\$353,761,640	\$22,972,136	7,739
Otter Tail	\$68,854,972	\$4,465,085	1,908	Pipestone	\$10,490,121	\$697,924	338
Pope	\$12,292,432	\$820,842	312	Redwood	\$24,333,024	\$1,720,408	423
Sherburne	\$73,938,675	\$4,477,738	1,896	Renville	\$8,937,535	\$608,457	279
Stearns	\$255,844,198	\$15,964,469	7,407	Rice	\$109,243,765	\$4,978,634	2,138
Stevens	\$12,129,031	\$700,656	464	Rock	\$8,609,138	\$580,844	247
Todd	\$17,876,829	\$1,194,738	421	Sibley	\$7,307,560	\$511,633	177
Wadena	\$14,413,135	\$971,263	392	Steele	\$59,272,160	\$3,818,583	1,454
<b>Region Total</b>	<b>\$992,672,980</b>	<b>\$62,504,458</b>	<b>25,547</b>	Swift	\$8,777,494	\$607,123	214
<b>Northwest Minnesota</b>				Traverse	\$2,100,371	\$154,535	31
Becker	\$62,595,767	\$3,979,708	1,310	Wabasha	\$20,555,722	\$1,342,161	634
Beltrami	\$70,958,914	\$4,526,452	1,676	Waseca	\$12,834,494	\$852,238	408
Cass	\$88,780,036	\$5,507,925	1,774	Watonwan	\$7,083,997	\$486,042	223
Clay	\$62,480,364	\$4,008,237	2,195	Winona	\$64,234,254	\$4,275,587	2,072
Clearwater	\$4,859,152	\$322,268	117	Yellow Medicine	\$13,501,188	\$450,668	231
Hubbard	\$32,092,906	\$2,116,089	751	<b>Region Total</b>	<b>\$1,325,513,682</b>	<b>\$81,924,158</b>	<b>33,123</b>
Kittson	\$2,875,454	\$205,549	52	<b>Northeast Minnesota</b>			
Lake of the Woods	\$24,233,128	\$1,355,662	427	Carlton	\$54,779,685	\$3,612,447	1,064
Mahnomen	\$15,845,614	\$949,900	78	Cook	\$48,472,297	\$3,013,050	824
Marshall	\$4,804,572	\$362,963	127	Itasca	\$68,317,044	\$4,294,678	1,551
Norman	\$3,105,843	\$218,148	73	Kanabec	\$10,867,771	\$699,085	268
Pennington	\$20,117,488	\$1,350,524	522	Koochiching	\$23,936,119	\$1,529,715	582
Polk	\$38,504,404	\$2,386,915	1,215	Lake	\$27,857,073	\$1,833,228	837
Red Lake	\$1,873,156	\$132,671	59	Pine	\$57,965,947	\$3,237,375	897
Roseau	\$15,480,246	\$1,040,345	414	St Louis	\$412,831,033	\$27,373,139	10,229
Wilkin	\$5,676,665	\$370,694	200	<b>Region Total</b>	<b>\$705,026,969</b>	<b>\$45,592,717</b>	<b>16,252</b>
<b>Region Total</b>	<b>\$454,283,709</b>	<b>\$28,834,050</b>	<b>10,990</b>	<b>Minnesota Total</b>	<b>\$11,013,765,143</b>	<b>\$699,132,081</b>	<b>238,130</b>

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