



minnesota travel indicators & brand health report

July 2026



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our travel indicators research

Explore Minnesota (EMN) regularly reviews and analyzes travel indicators to better understand tourism industry health.

This report is focused on state-level trends from January to May 2026 and includes Minnesota brand health and national travel sentiment research insights.

key findings

Operation Metro Surge and federal presence in Minnesota prompted a tough start to the year for the tourism economy. For the first five months of 2026, we observed year-over-year (YoY) increases in state hotel metrics; however, leisure and hospitality (l&h) employment, MSP air travel and Canadian visitation remain weakened relative to 2025.

accommodations – From January to May 2026, Minnesota's hotel key performance metrics increased 1 to 5% relative to 2025. Monthly occupancy percentage ranged from 46% to 58%, monthly ADR ranged from \$124 to \$134, and monthly RevPAR ranged from \$57 to \$77.

l&h employment – Minnesota's leisure & hospitality (L&H) employment decreased 1.5% in the first five months of 2026 relative to 2025; this range includes a high of 282k (May) to a low of 251k (February).

air travel – Minneapolis-Saint Paul Airport (MSP) airport had 13.8 million passengers during the first five months of 2026. This is 2.8% less, or a 395k decrease from the same months in 2025.

canadian & international visitation – Canadian visitation to Minnesota continues to be below 2024 and 2025, however, in March, April and May of 2026, visitor volume improved 1 to 14% relative to 2025. In 2026, international visitation is forecast to increase 4% YoY relative to 2025.

additional research

As Minnesota enjoys our busy summer travel season, there are reasons for optimism.

minnesota brand health survey – In June 2026, Explore Minnesota conducted a new brand health survey to learn about non-Minnesotans' views of our state. Findings from 500+ responses are positive:

- 53% have a very or somewhat favorable impression of Minnesota
- Over the past year, impressions of Minnesota stayed the same for 49% and improved significantly or somewhat for 38%
- Almost all past Minnesota visitors rate their experience positively, with 44% good and 38% excellent

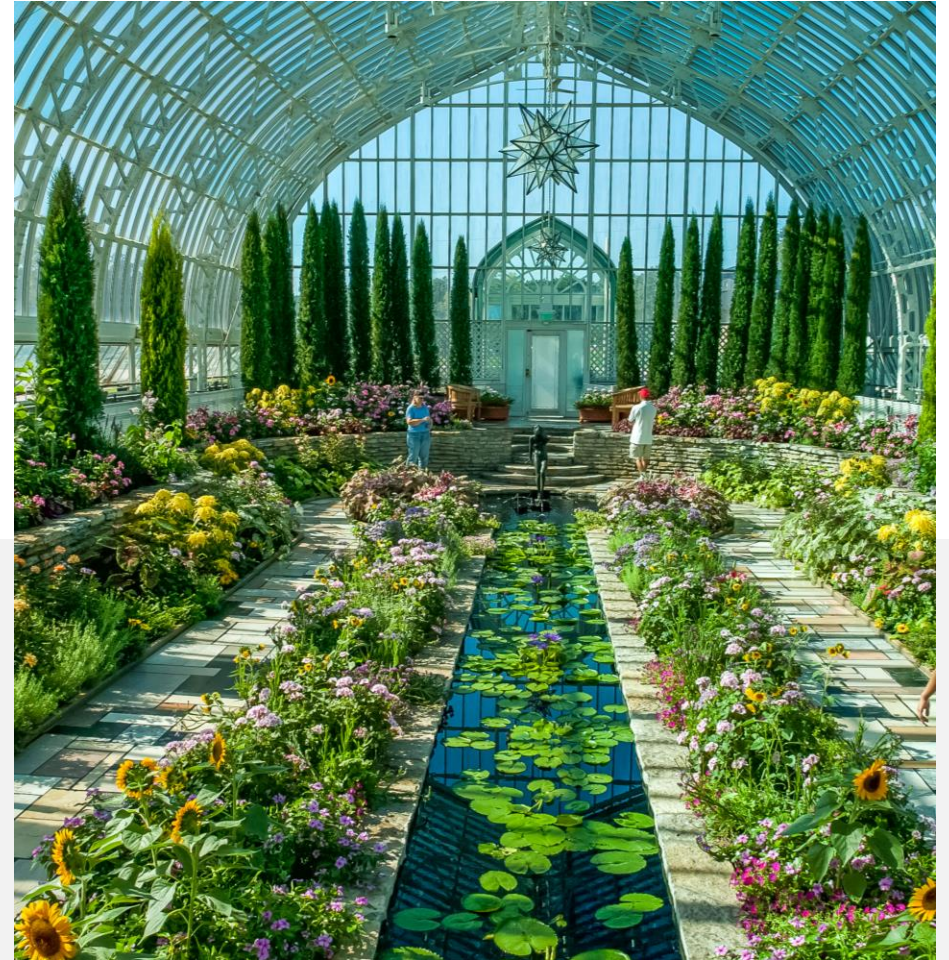
american travel sentiment research – [Longwoods'](#) latest national survey says that 89% of U.S. leisure travelers have travel plans within the next six months, with 41% choosing destinations closer to home due to increased gas prices.

According to 2026 [Wallet Hub](#) research, Minnesota is the #1 state for road trips. Minnesota is a strong regional market with an array of affordable, world-class destinations and experiences, from our lakes and trails to our restaurants, festivals and main streets.

hotel, employment, MSP airport & international visitation trends

January – May 2026 data

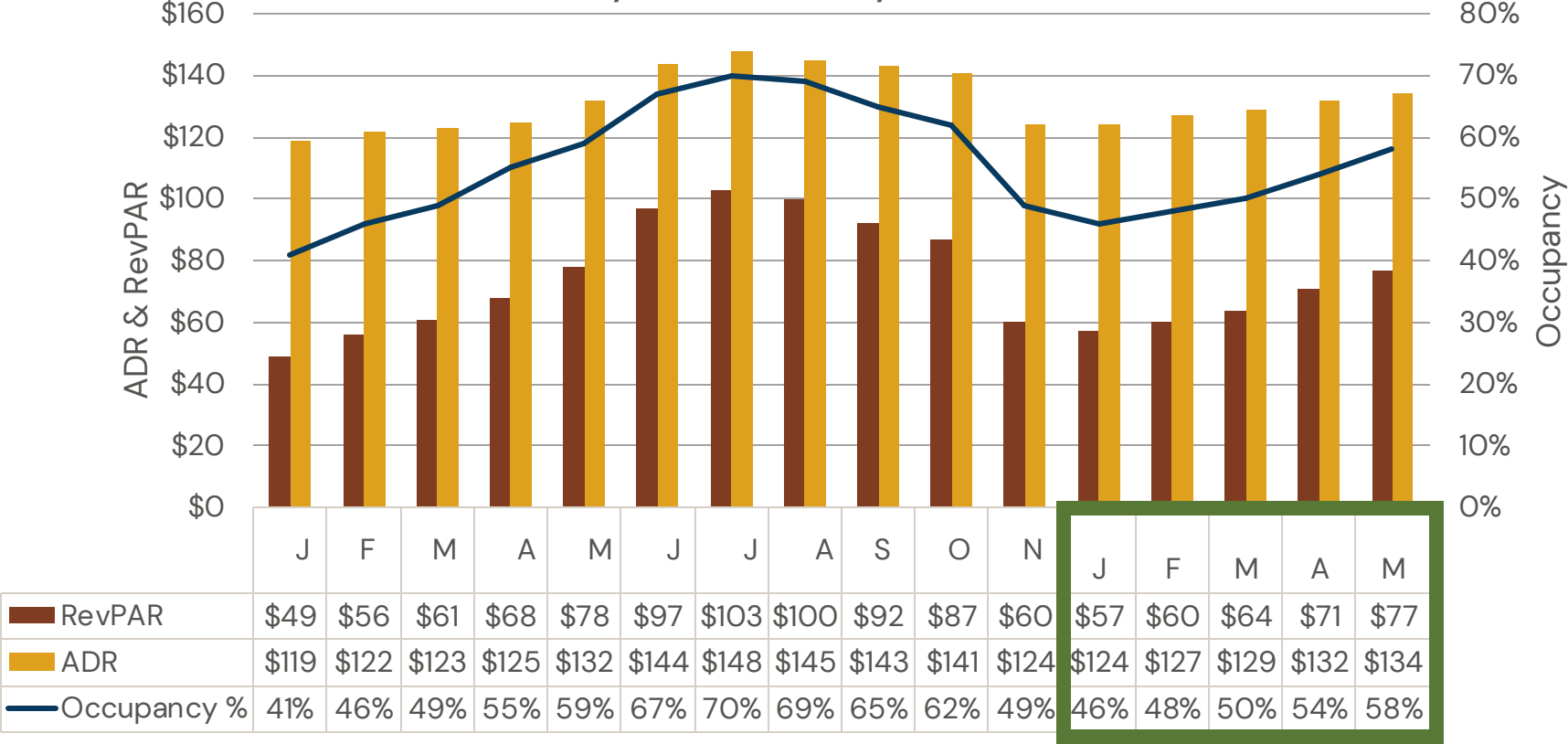
minnesota travel indicators





state hotel metrics

Minnesota Hotel Metrics Over Time
January 2025 – May 2026



For the first five months of 2026 combined, hotel metrics improved 1 to 5% relative to the same months of 2025.

Following expected trends, the three key metrics were highest in May and lowest in January.

- **Occupancy** ranged from 46 to 58%
- **Average daily rate (ADR)** ranged from \$124 to \$134
- **Revenue per available room (RevPAR)** ranged from \$57 to \$77

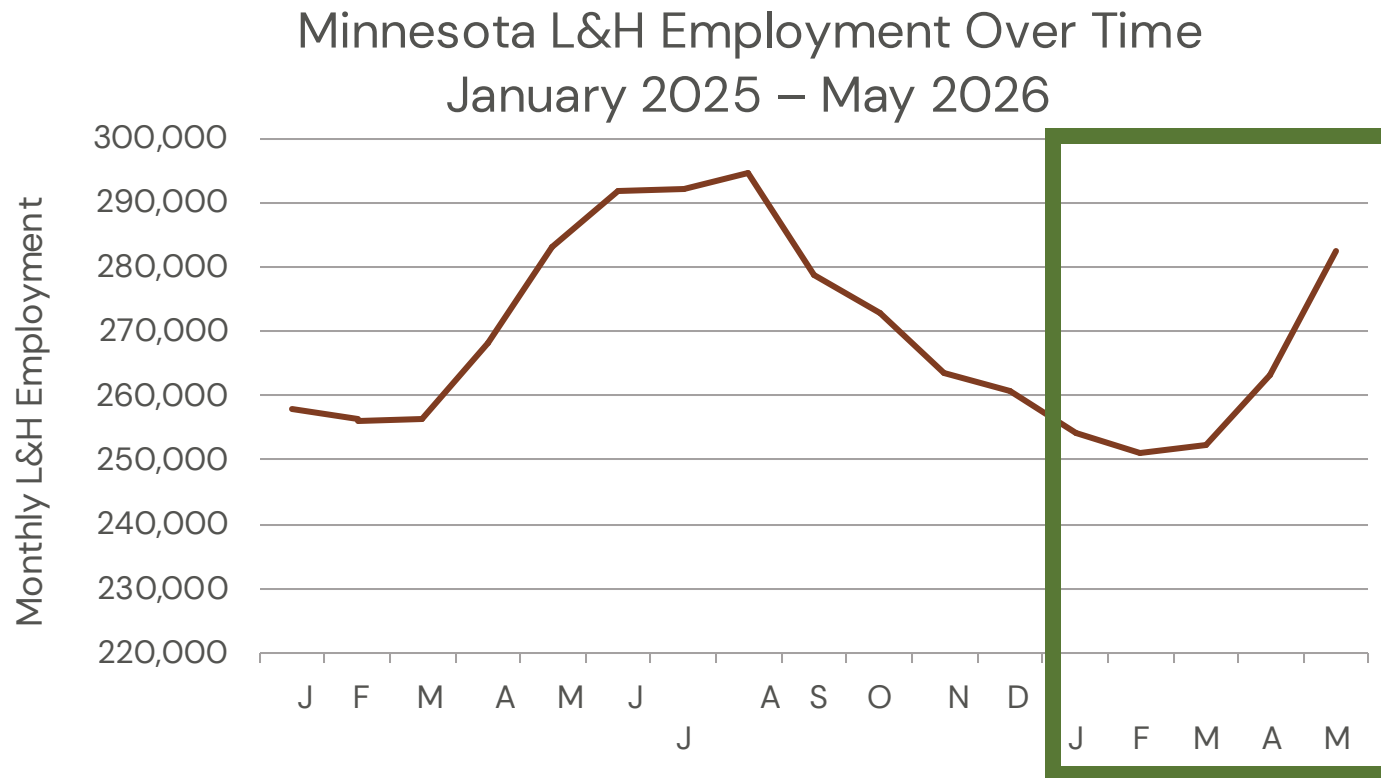
regional hotel metrics

Minnesota State & Tourism Region Hotel Metrics 2026 Year-to-Date Through May						
Geography	Occupancy		ADR		RevPAR	
	2026	YoY % Change	2026	YoY % Change	2026	YoY % Change
Total U.S.	61.7%	1.3%	\$164.15	2.7%	\$101.27	4%
Michigan, Minnesota & Wisconsin Average	51%	2.4%	\$123.28	1.4%	\$62.85	3.8%
State of MN	51%	1.4%	\$129.65	4.4%	\$66.08	5.8%
Central MN	45.8%	3.5%	\$128.79	3.9%	\$59.04	7.5%
Metro MN	55.1%	1.1%	\$131.12	4.7%	\$72.20	5.9%
Northeastern MN	45.1%	1.3%	\$134.25	1.4%	\$60.56	2.7%
Northwestern MN	43.5%	.5%	\$113.45	3.5%	\$49.39	4.1%
Southern MN	48.9%	2%	\$121.12	4.1%	\$59.28	6.2%

Year-to-date, Minnesota hotel key performance metrics are up across the state and are similar to those of key competitive states (Michigan, Wisconsin).

- **Central** – Largest regional YoY RevPAR increase (7.5%)
- **Metro MN** – Highest regional occupancy (55.1%)
- **Northeastern** – Highest regional ADR (\$134.25)
- **Northwestern**– Lowest region for all three key hotel performance metrics (43% occupancy, \$113.45 ADR & \$49.39 RevPAR)
- **Southern** – Second-highest regional occupancy (48.9%)

★ leisure & hospitality (I&h) employment

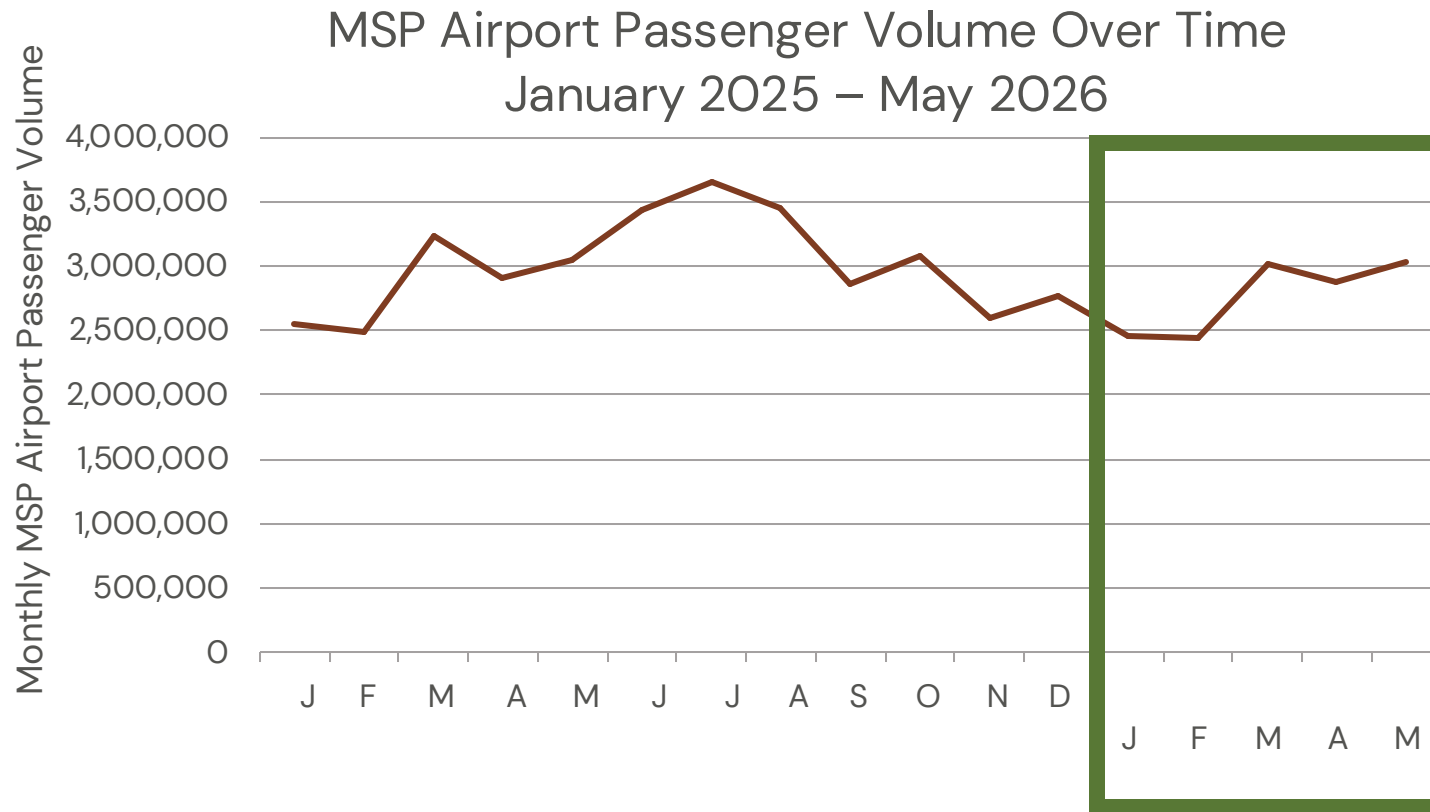


For the first five months of 2026, leisure and hospitality employment averaged about 261,000.

- This is **down about 4,000 jobs or 1.5%** from 2025.
- Following normal seasonal trends, industry employment was **lower in winter months and growing in the spring.**



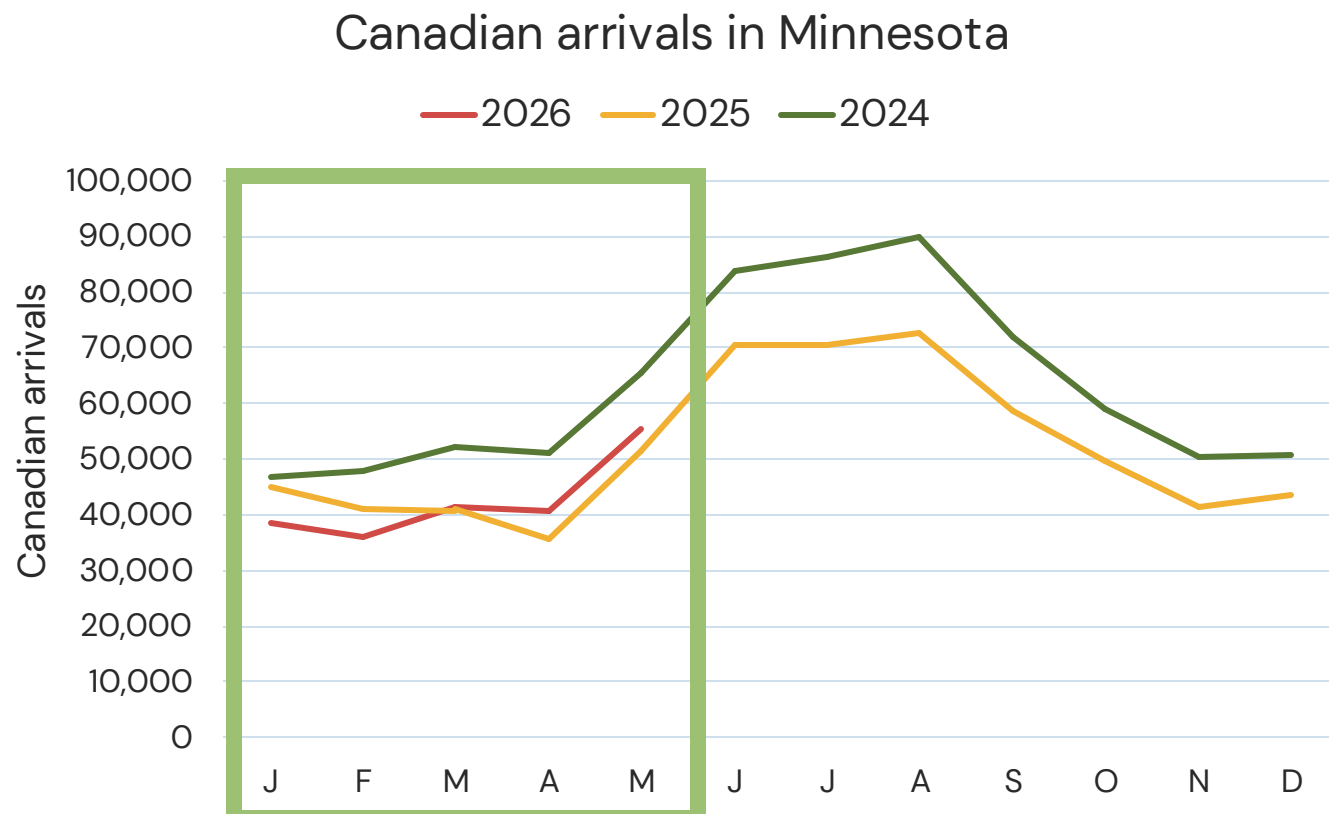
msp airport



Between January and May, 13.8 million passengers passed through Minneapolis–St. Paul (MSP) airport.

- This is a **2.8% or 395k drop** from the same five-month period in 2025.

canadian visitation



In the first five months of 2026, Canadian visitation to Minnesota continues to be below 2024 and 2025.

- Year-to-date 2026 visitation by Canadians is **down 20% relative to 2024**
- Year-to-date 2026 Minnesota visitation by Canadians is **down 1% relative to 2025**

However, in March, April and May of 2026, visitor volume improved relative to 2025. May had the most visitors year-to-date with 55,500.



international visitation



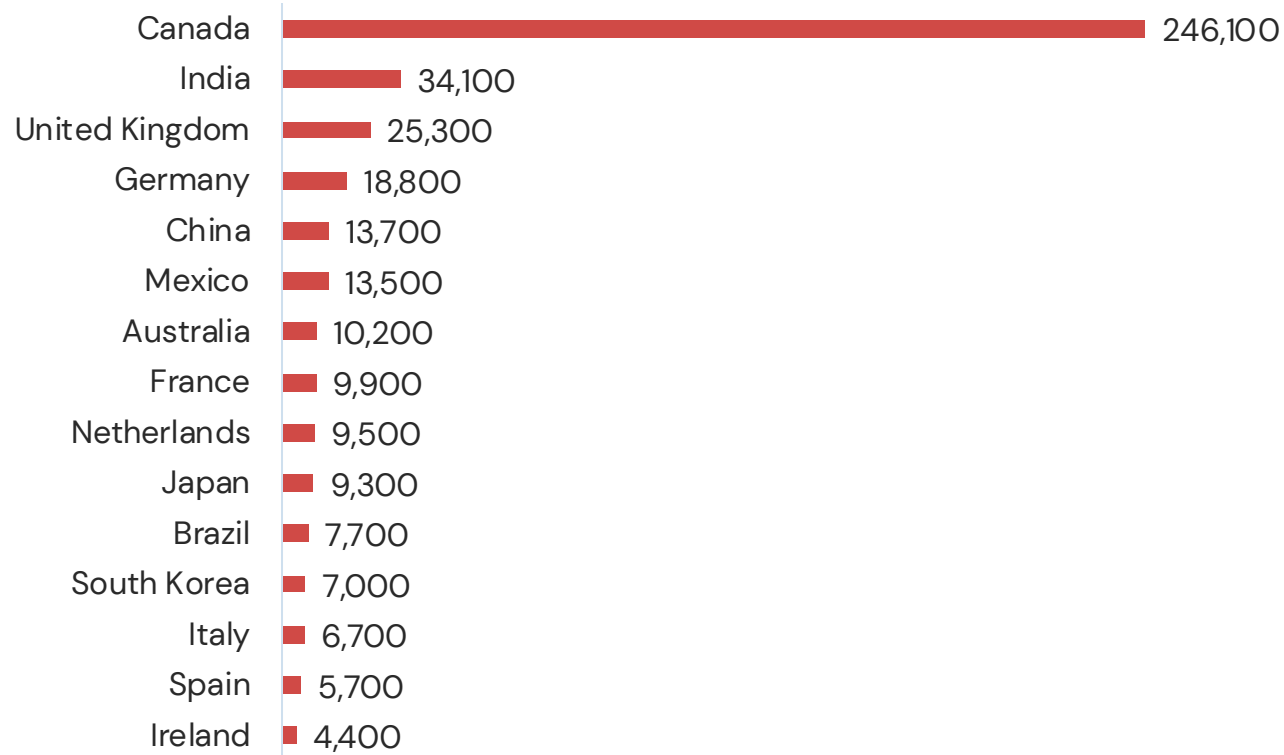
Tourism Economics (TE) estimates that Minnesota received 516,900 international visitors from Canada, Mexico and places overseas in 2025. These travelers spent \$544 million in Minnesota.

TE also forecasts international arrival numbers.

- In 2026, 537,900 international visitors are expected to come to Minnesota, a 4% YoY increase.
- In 2030, 673,400 international visitors are expected, a 25% increase relative to 2025.

international markets

Minnesota Top Origin Market Visitation Volume 2025



In 2025, Canada accounted for 48% of Minnesota's international visitation, with 246,100 visitors.

- **India** remained the second-largest Minnesota visitor origin market, with an estimated 34,100 visitors in 2025.
- The **United Kingdom, Germany and China** are the other top three countries for Minnesota 2025 visitation.

national perspective on our state

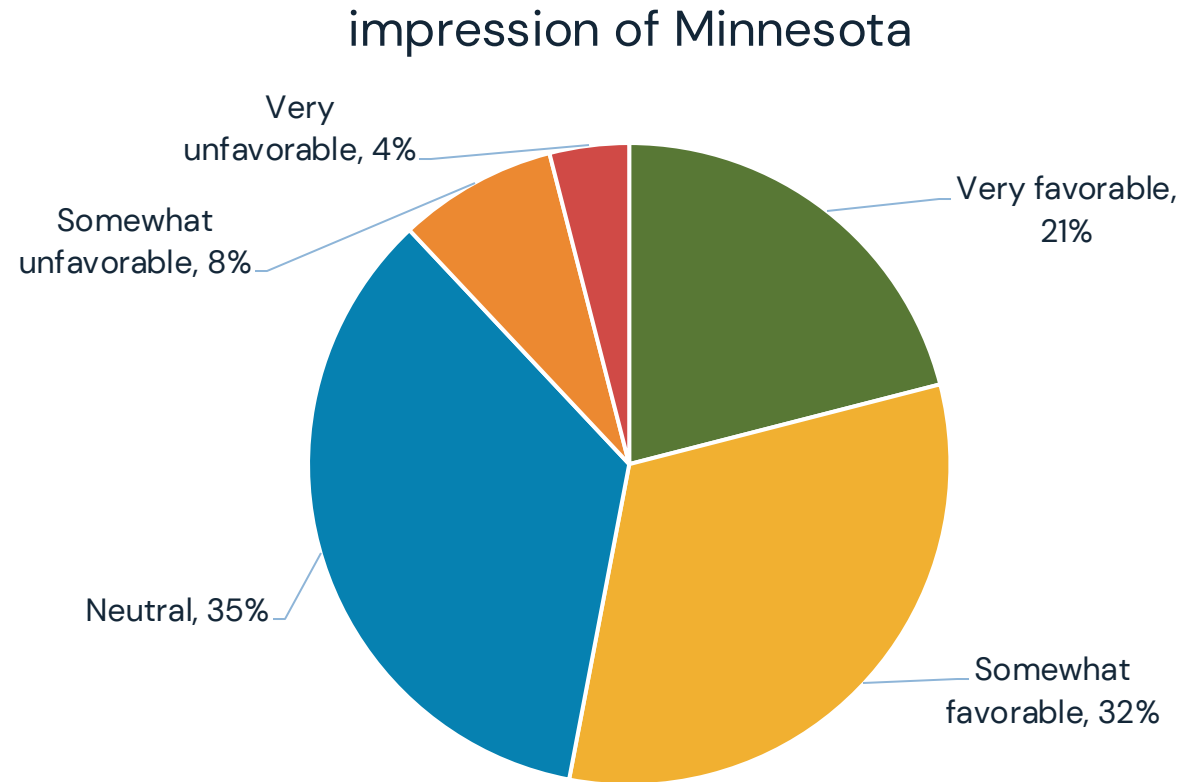
Explore Minnesota launched a new brand health survey, building on previous one-time surveys with vendors in 2021 and 2025.

- Conducted from June 25–29, we received 515 responses from a balanced census panel of non-Minnesotans across the U.S.

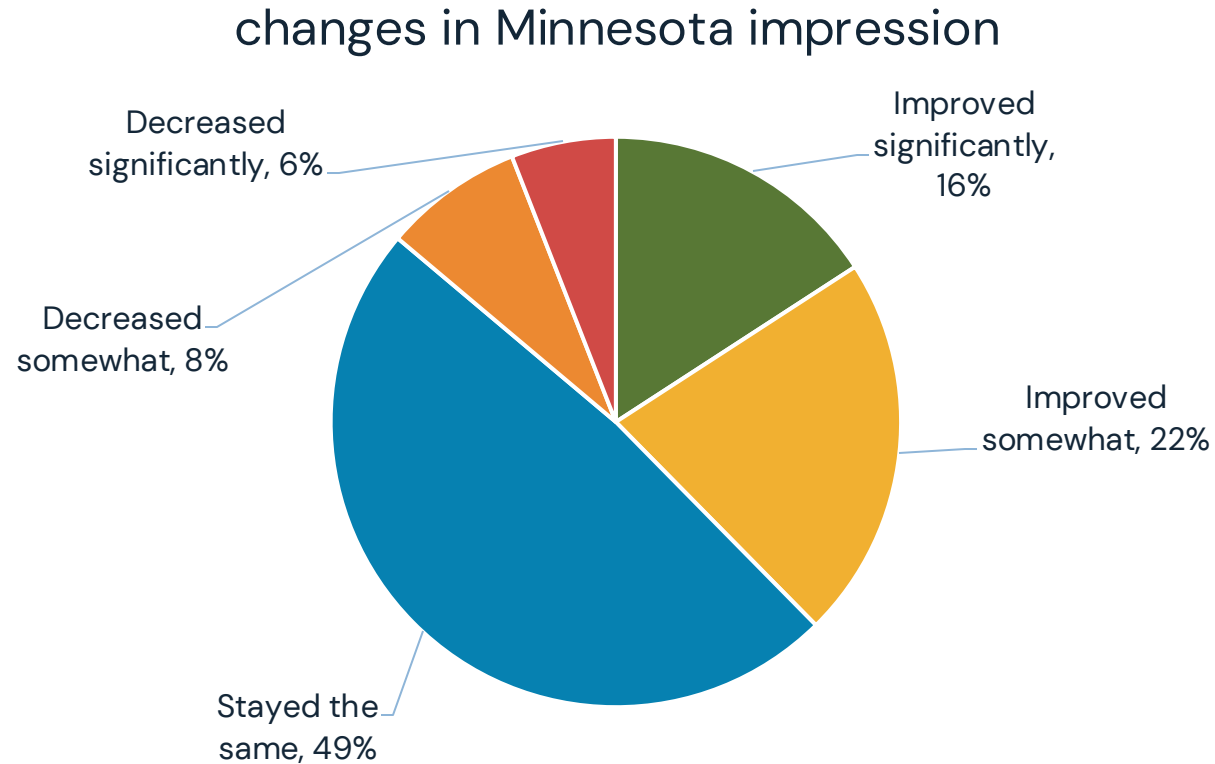
minnesota brand health



★ **53% have a very or somewhat favorable impression of Minnesota; 35% have a neutral impression**

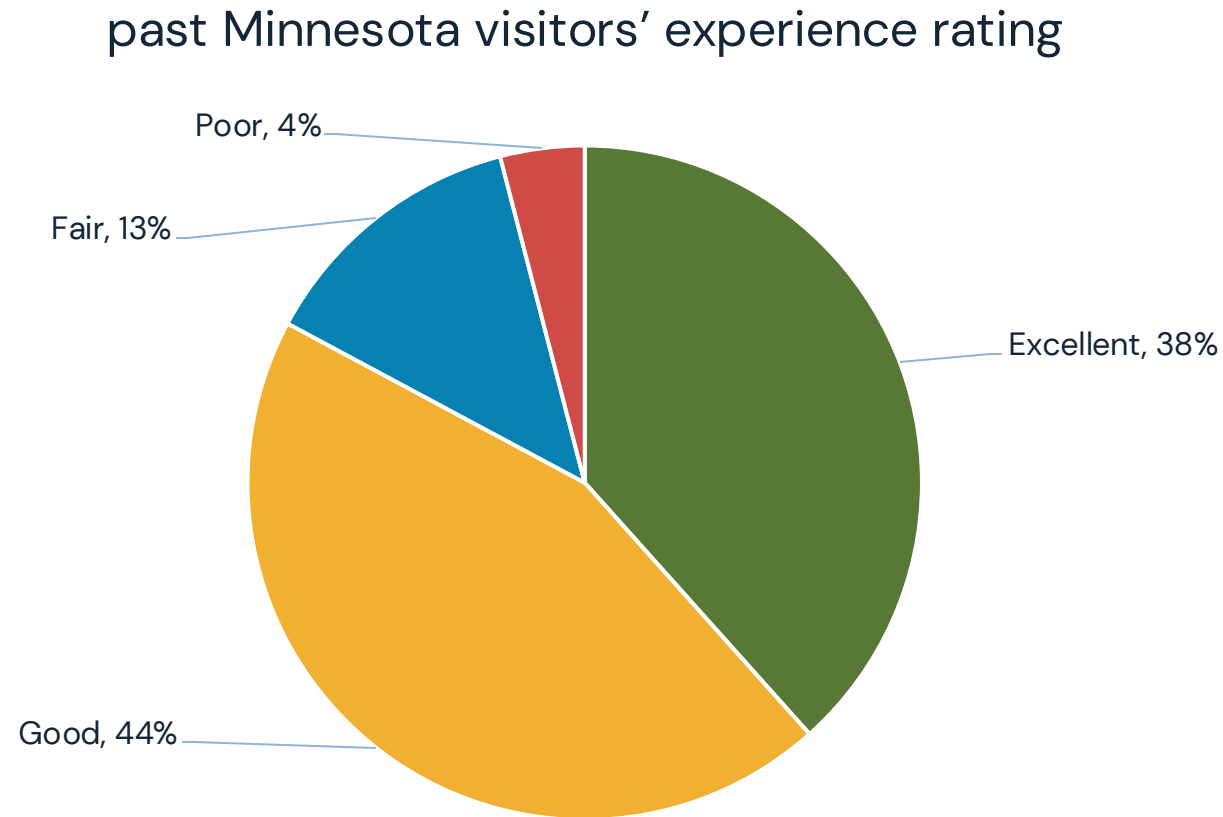


★ over the past year, impressions stayed the same for 49% and improved significantly or somewhat for 38%



In the past year prior to this survey being issued, (June 2025–2026), many Minnesota stories broke through to national news.

★ for those who have visited, almost all rate their experience positively: 38% excellent and 44% good



These data point to the fact that once visitors come to Minnesota, they overwhelmingly have a good experience.

An aerial photograph of a city, likely Minneapolis, featuring a large river (the Mississippi) and a prominent bridge. The city skyline is visible in the background with various buildings and greenery. A dark blue semi-transparent rectangle is overlaid on the center of the image, containing white text and logos.

questions or suggestions?

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★ Lodging metric definitions

- **Occupancy percentage** – Rooms sold divided by rooms available multiplied by 100. Occupancy is always expressed as a percentage of rooms occupied.
- **Annual Daily Rate (ADR)** – Room revenue divided by rooms sold, displayed as the average rate for a single room.
- **Revenue Per Available Room (RevPAR)** – Total room revenue generated from the sale or rental of rooms.
- **Geography** – The five Minnesota Tourism Regions are defined as shown in this map:





★ brand health survey approach

In June 2026, Explore Minnesota launched a new brand health survey.

- Focused questions on Minnesota as a place to visit and live.
- Utilized an age and gender-balanced census panel of survey respondents from across the U.S.
 - + Survey qualifications:
 - > Non-Minnesota residents
 - > Household income of \$75,000+
 - > 20 to 60 years old
- Conducted through Survey Monkey, using their paid targeted audience response offering.
- Received 515 total responses.