



AN INITIAL ASSESSMENT OF MINNEAPOLIS AS A TOURIST DESTINATION

Kevin Hanstad
March 11, 2016



Minneapolis
City by Nature

Meet Minneapolis
Convention & Visitors Association

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BACKGROUND & OBJECTIVE

- The key strategic initiative of Meet Minneapolis in 2016 is the development of a tourism master plan.
- A tourism master plan (TMP) is a long-term (10 - 20 year) strategic plan to develop the tourism industry in a city, state or nation to drive economic impact for the benefit of the community.
- One of the first steps in the development of a TMP is an assessment of the locale as a tourist destination.
- The objective of this document is to report an initial assessment of the city of Minneapolis as a tourist destination leveraging data already in-hand.



EXECUTIVE SUMMARY

- Minneapolis-St. Paul welcomed 30.9 million visitors in 2014, an all-time high.
- They spent \$7.4 billion.
- Three out of four originate from Minnesota, Wisconsin, Iowa or the Dakotas.
- Seventy percent visit for leisure purposes.
- Their primary reasons for visiting are sports, family events, shopping and “*social consciousness*” (*volunteerism, religious conferences, eco-travel*).
- On average, the visitors make 9.2 visits over a three-year period.
- They rate the quality of their visit to be very high overall, especially the arts & entertainment, nature & parks, restaurants, shopping and nightlife.
- There is less satisfaction with hotel quality.



EXECUTIVE SUMMARY

- Minneapolis is currently at a disadvantage relative to its peer set on the number of downtown hotel rooms.
- However, 1,500 new rooms are coming online within the next two years, albeit a distance from the convention center.
- airbnb represents about a 2.5% share of the downtown hotel market.
- Minneapolis provides a rich arts and cultural offering, but the museums, theaters, concerts and dance companies are under-utilized by visitors.
- Likewise, sightseeing is a less frequent activity of visitors, likely related to the limited number of attractions in the city.
- Sports is ***king*** for Minneapolis visitors – professional as well as participatory - ***including*** winter sports.
- The *City by Nature* brand is now four years-old, but with a very limited marketing spend, awareness of Minneapolis as a destination remains a challenge.



EXECUTIVE SUMMARY

- The number of public events in Minneapolis is also limited with two-thirds occurring in the summer months.
- Meetings and conventions are robust, breaking 600 in number for the first time in 2015, and supported by a vital convention center operating at 57% annual occupancy.
- The Minneapolis park system, one of the best in the country, is underutilized by visitors.
- The charm of Minneapolis neighborhoods is best represented by Northeast and Uptown, but an understanding of visitors' appreciation for them is lacking.
- Another challenge is retail; however, the expectation is that it will follow the significant downtown residential development.
- Truly, the emerging restaurant scene is hot among “*foodies*”, but appears to remain an opportunity among visitors.
- The LRT is well-regarded by visitors and used by as many as four out of ten of them.



EXECUTIVE SUMMARY

➤ Opportunities

- Increase awareness of Minneapolis as a destination
 - Consider the creation of an “iconic” attraction*
- Attract visitors beyond the five-state area
- Increase visitors use of
 - *Attractions*
 - *Museums, theaters, concerts & dance*
 - *Parks*
 - *Restaurants*
 - *Retail*
 - *Tap rooms*
- Develop events
- Leverage SPORTS
- Improve wayfinding
- Gain an understanding of neighborhoods appeal to visitors
- Grow the advertising spend
- Address hotel quality perceptions and proximity to the convention center



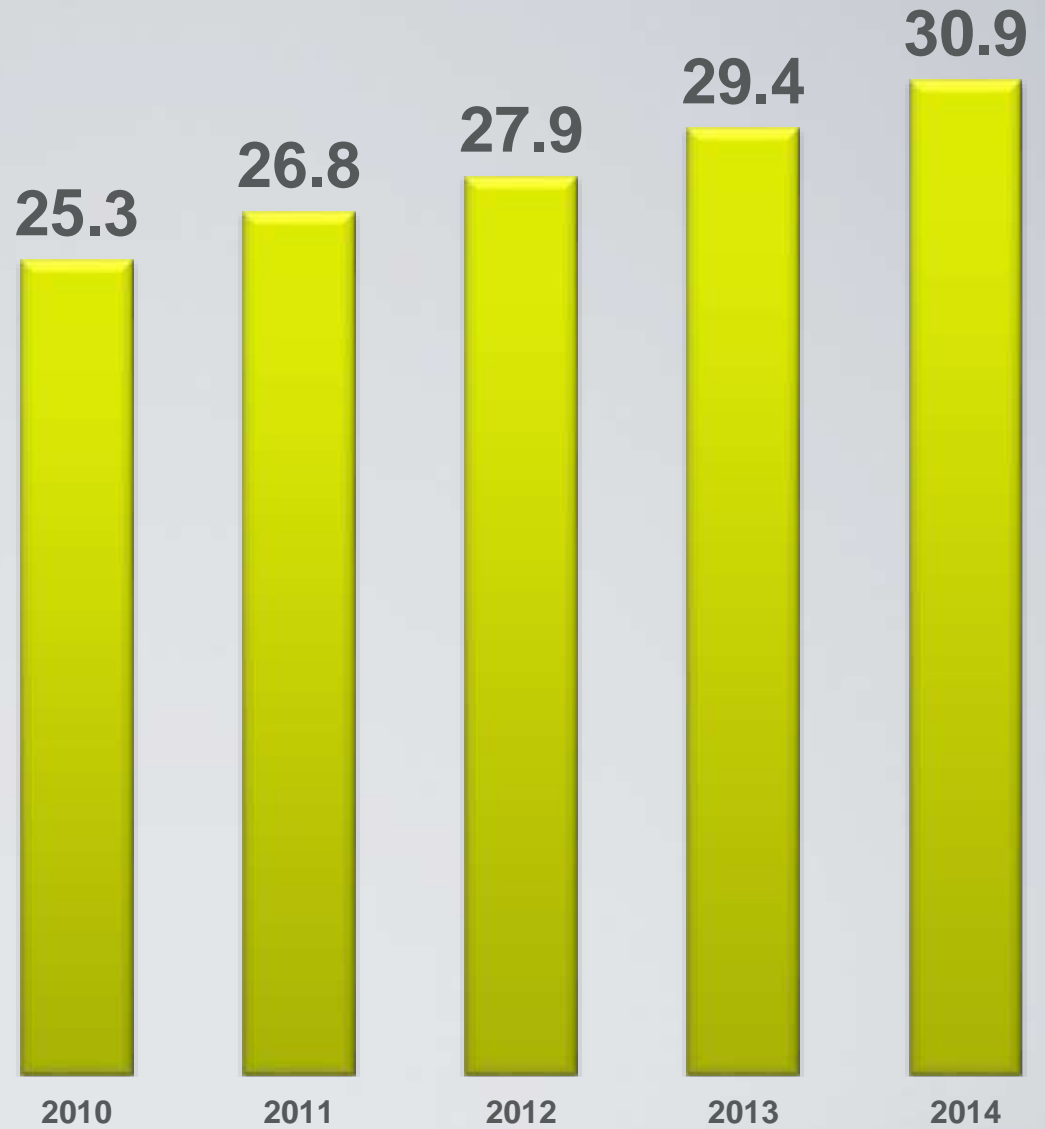
THE VISITOR



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MINNEAPOLIS- ST. PAUL VISITORS (MILLIONS)



Source: D.K. Shifflet & Associates, Ltd.



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2014 METROPOLITAN AREA VISITORS

Chicago 50 Million

MSP 31 Million

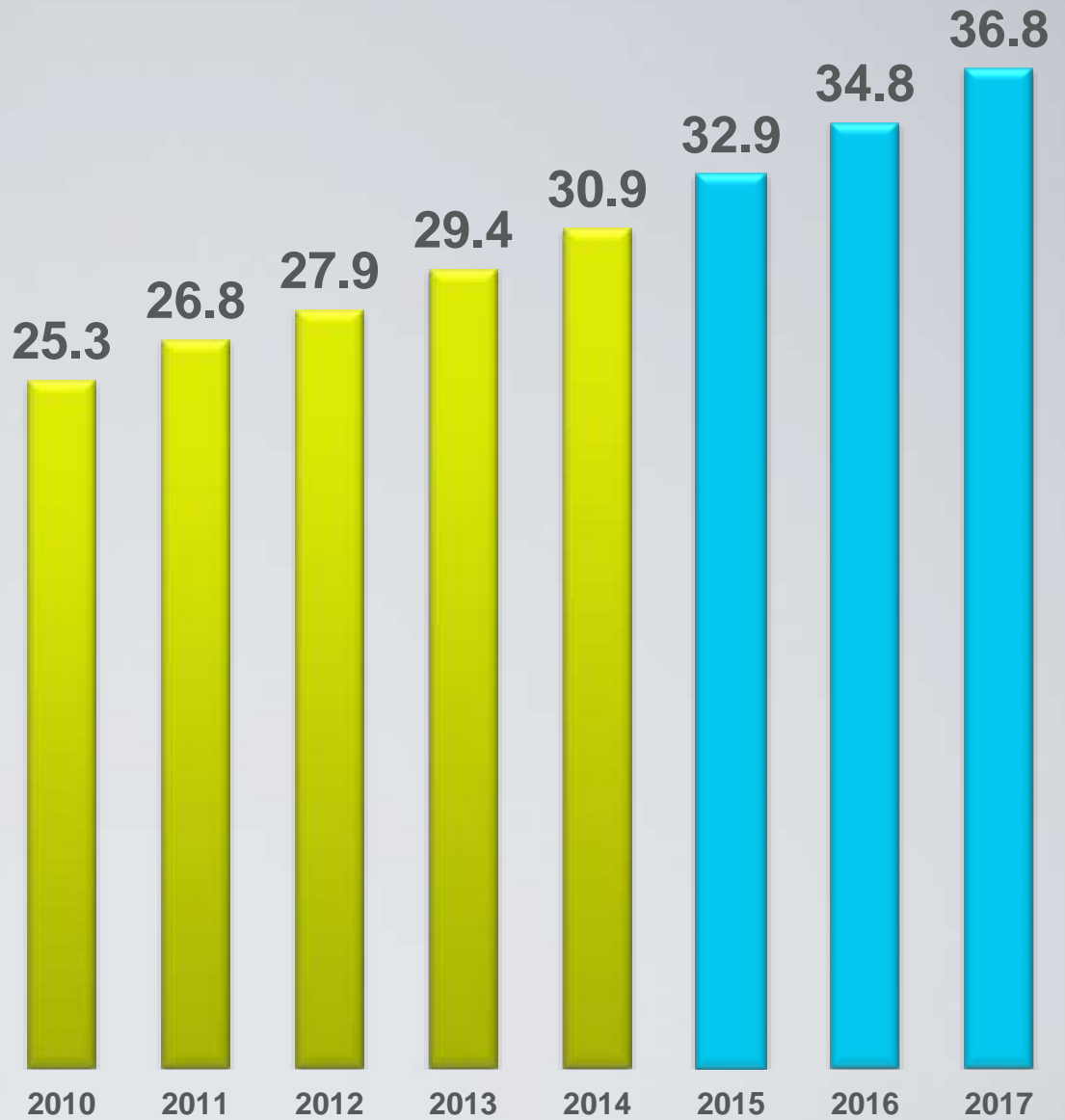
Indianapolis 26 Million

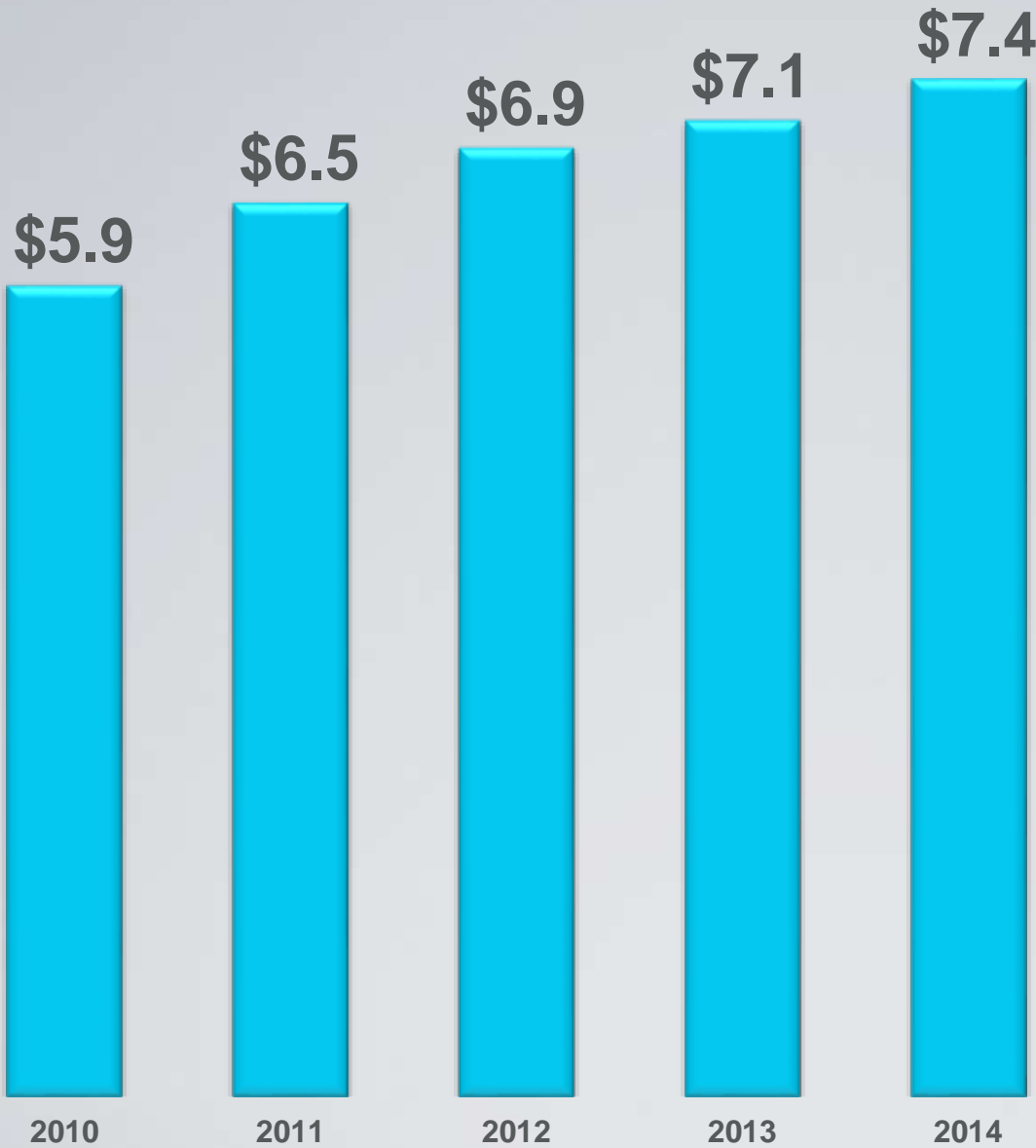
St. Louis 24 Million

Denver 15 Million



MEET MINNEPAOLIS GOAL: 36.8 MILLION VISITORS IN 2017



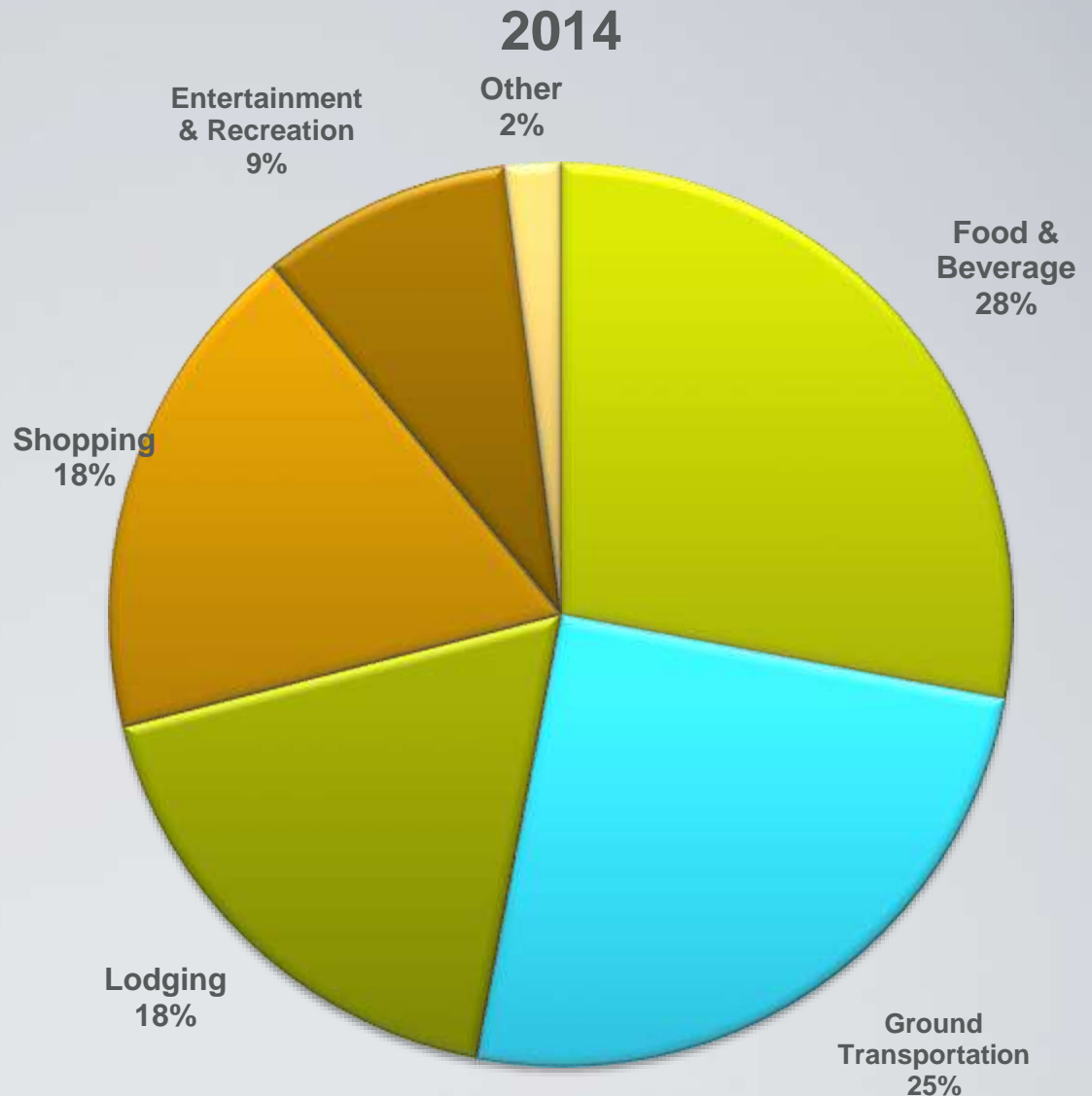


MINNEAPOLIS-ST. PAUL VISITOR SPENDING *(BILLIONS)*

Source: D.K. Shifflet & Associates, Ltd.

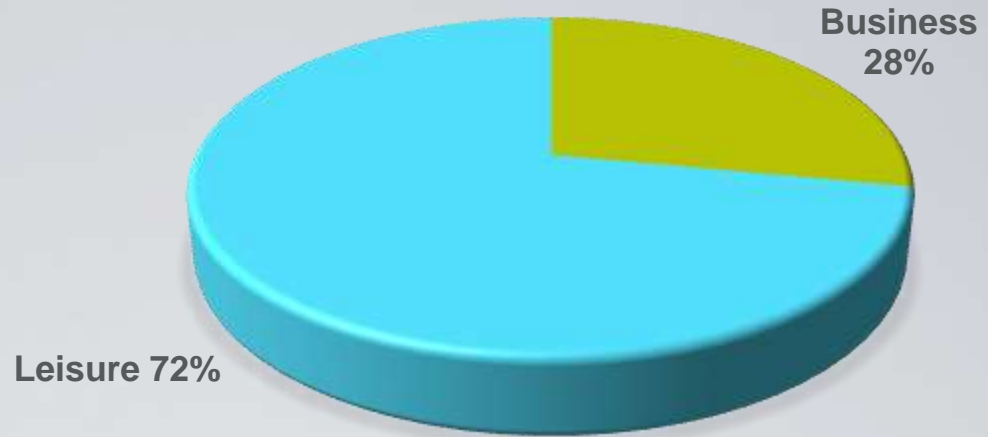
VISITOR SPENDING BY CATEGORY (EXCLUDING AIRFARE)

\$6.6 BILLION

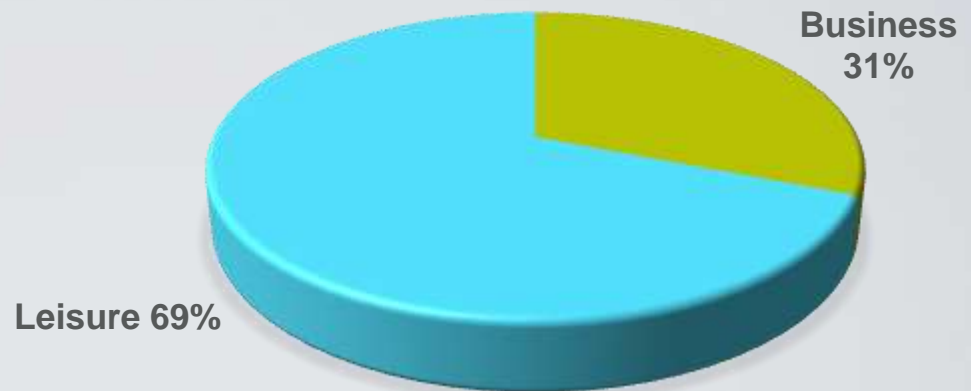


VISITORS AND SPENDING BY TRIP PURPOSE (2014)

VISITORS: 30.9 MILLION



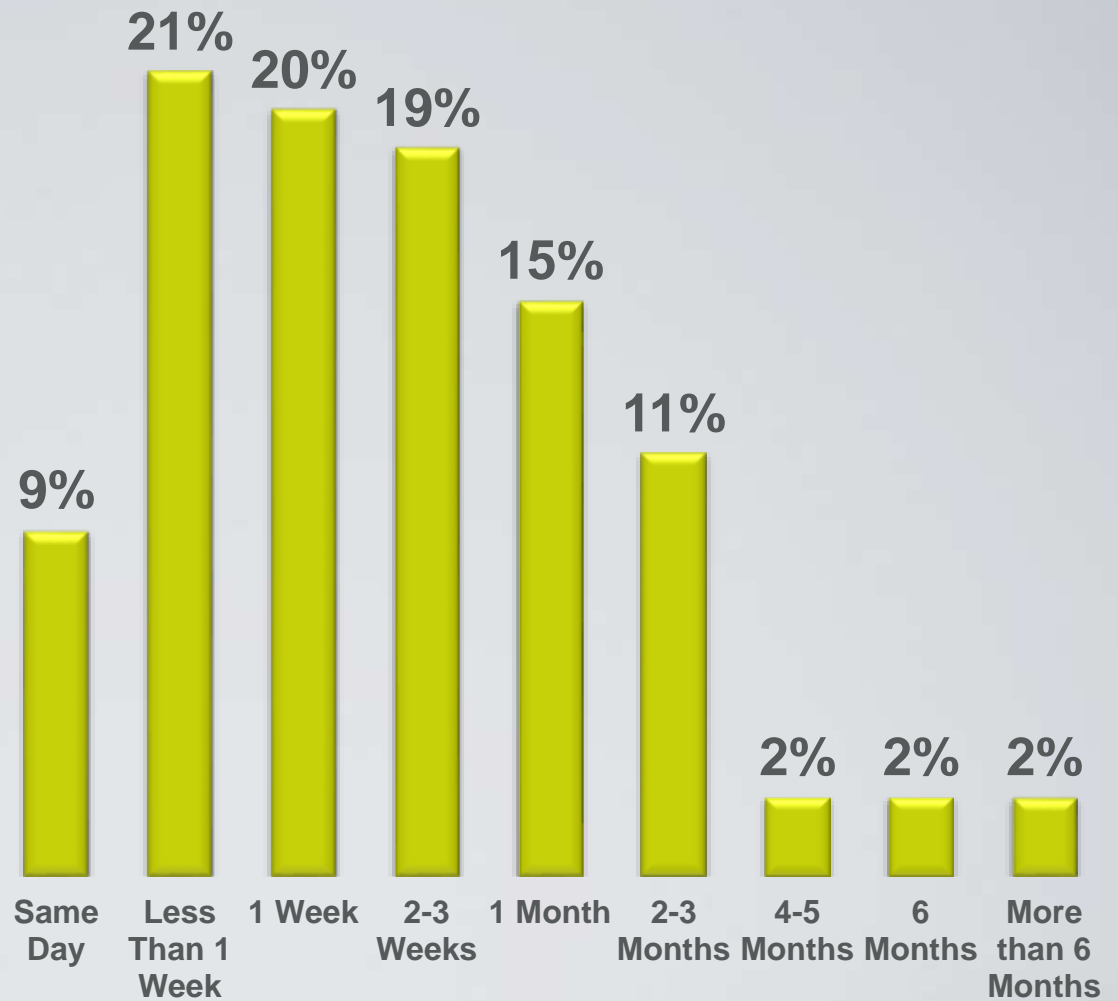
VISITOR SPENDING: \$7.4 BILLION



Source: D.K. Shifflet & Associates, Ltd.

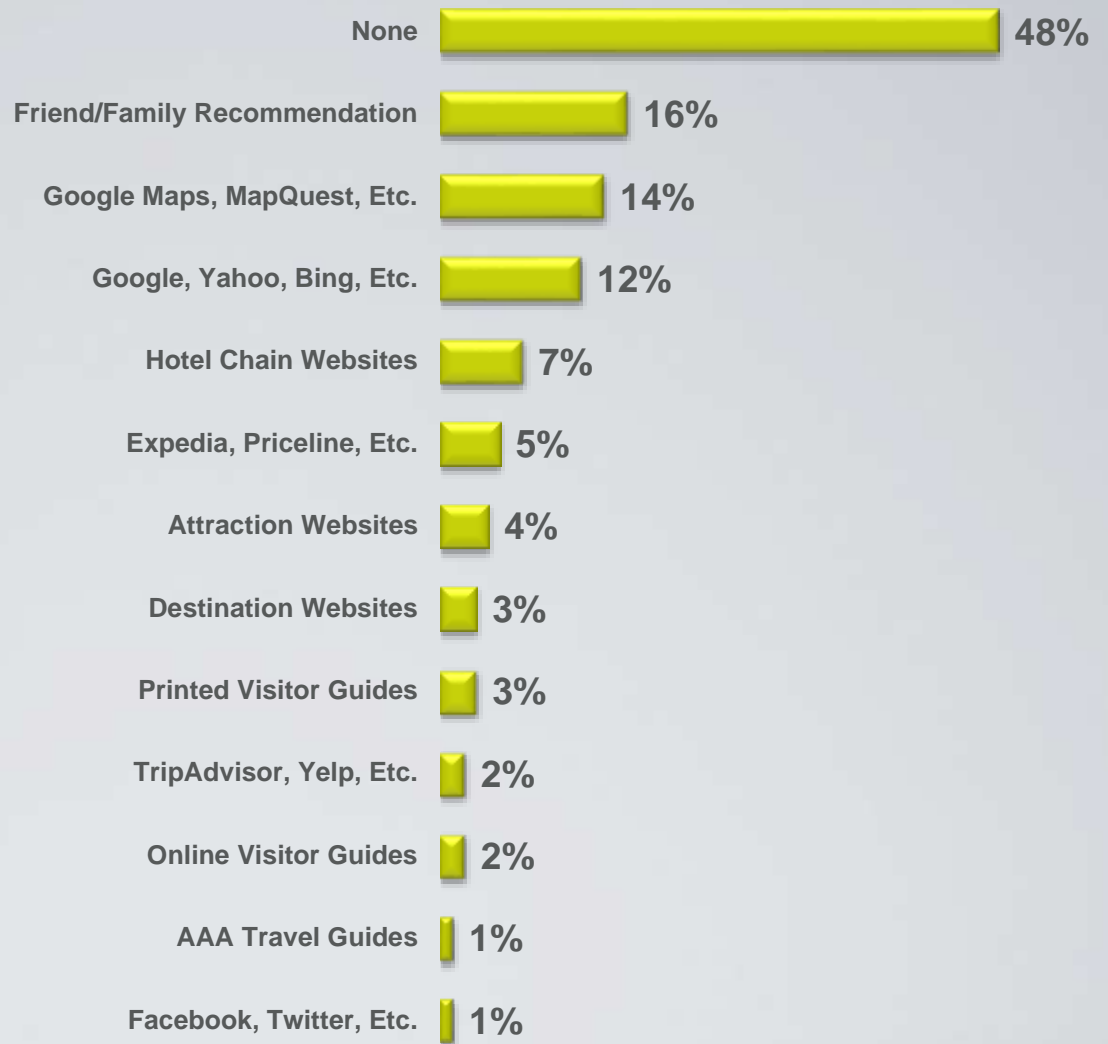
PLANNING TRIP TO MSP

Planning Time Frame

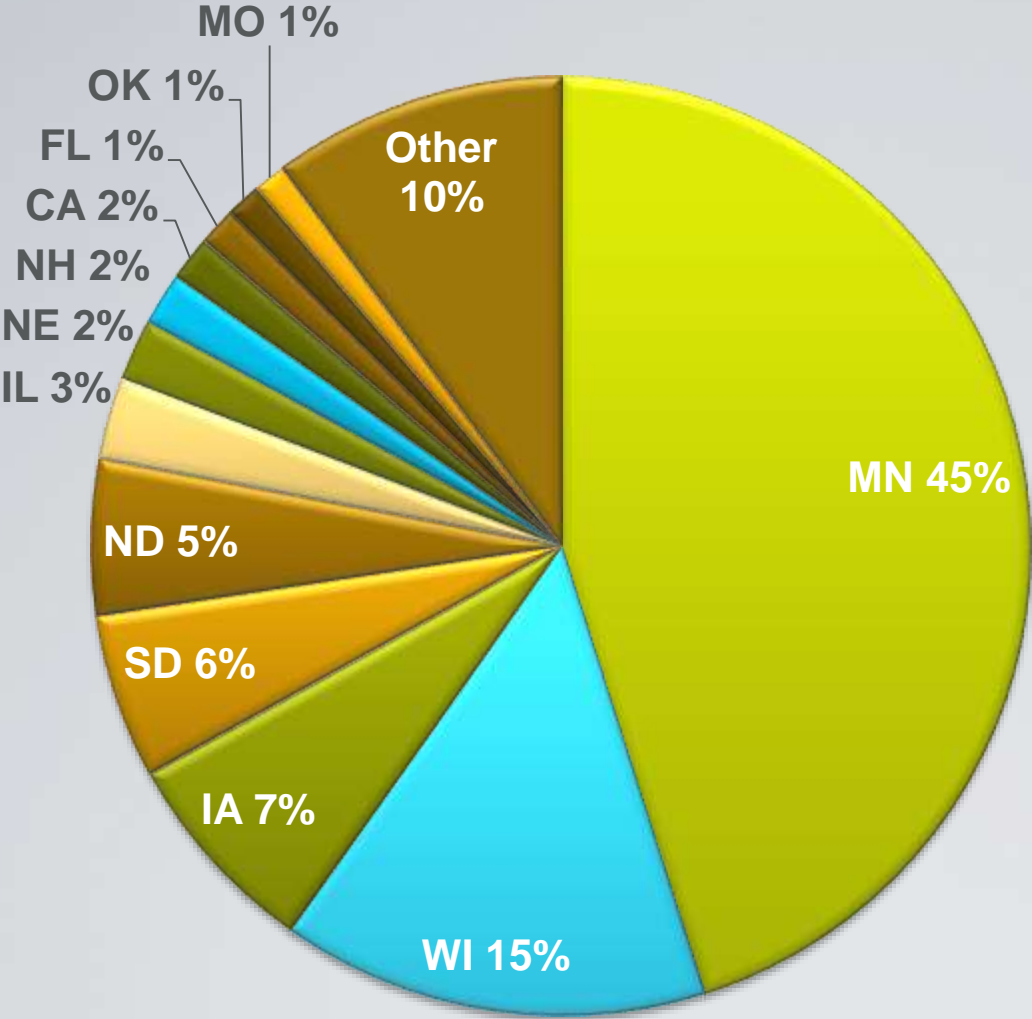


PLANNING TRIP TO MSP

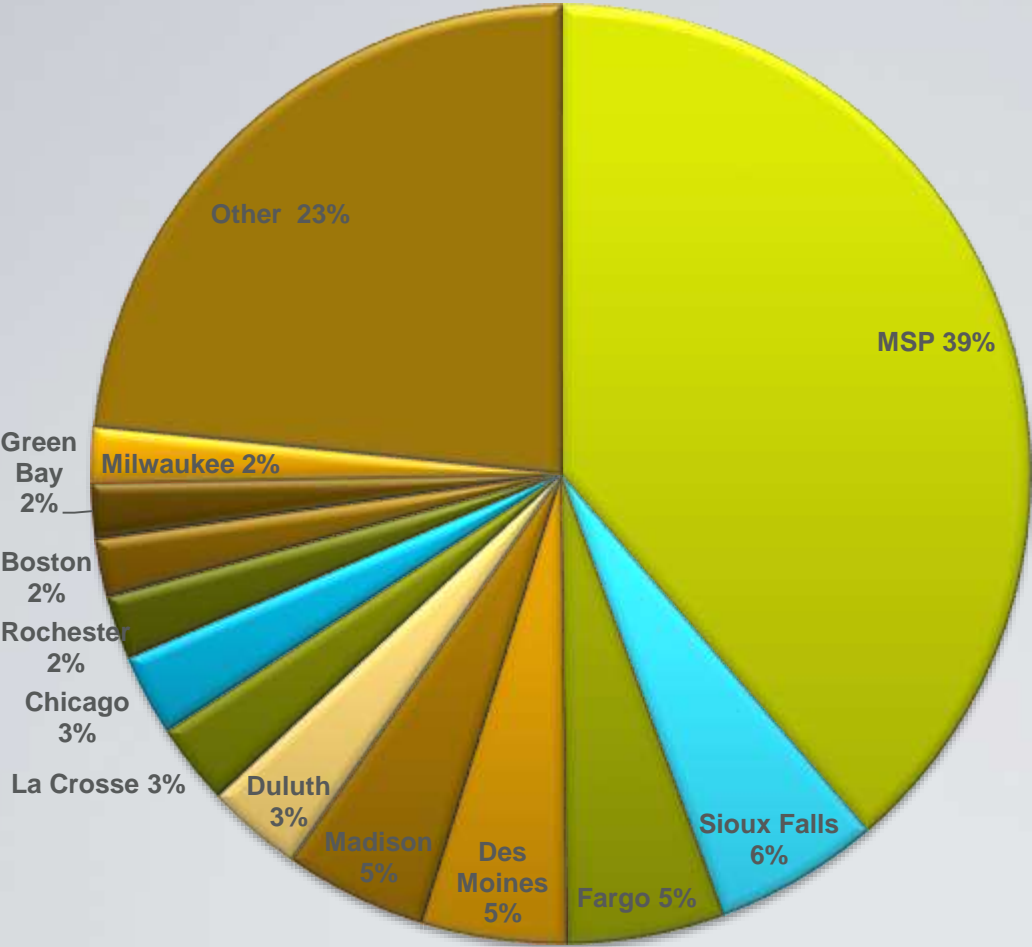
Resources Used



STATE OF ORIGIN



CITY OF ORIGIN



SPENDING BY CITY OF ORIGIN

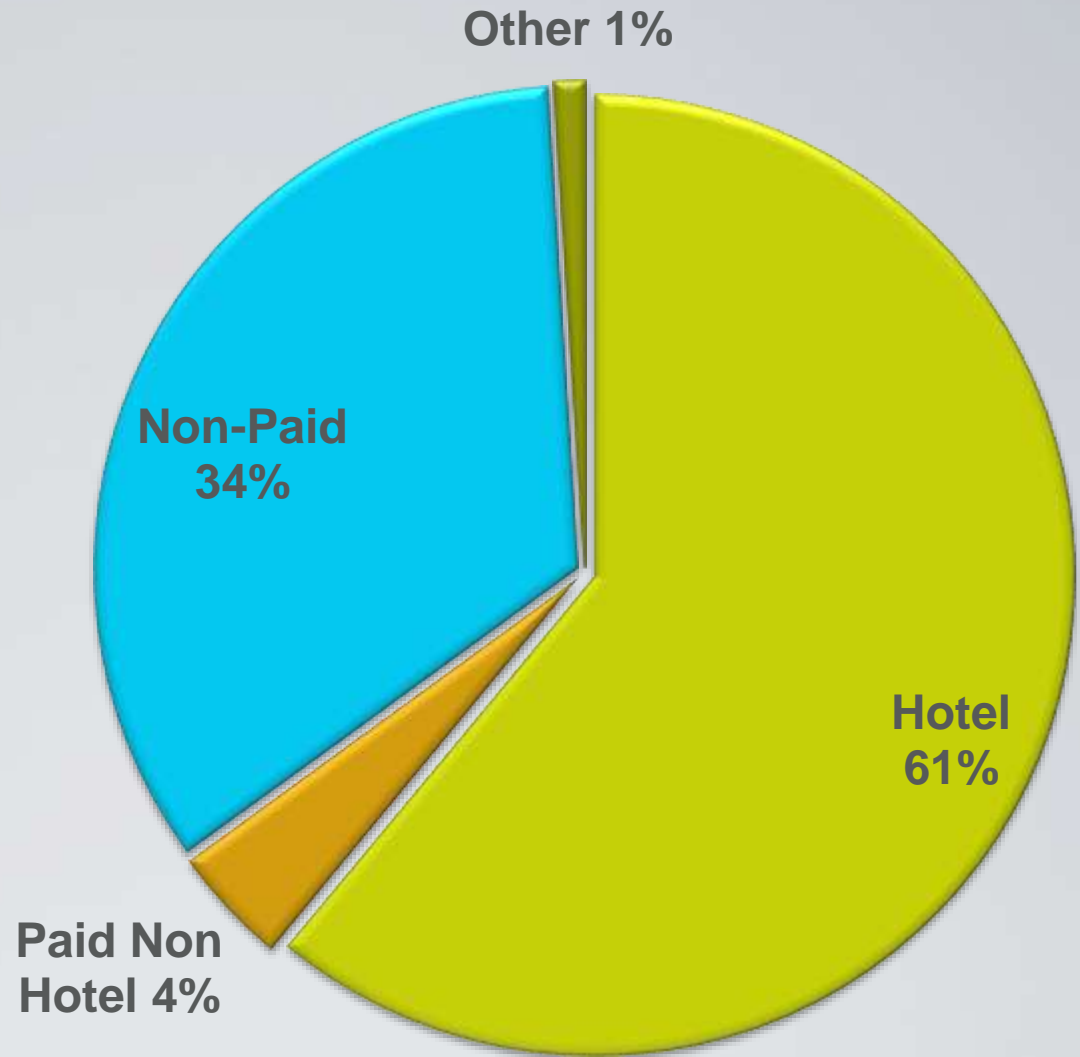


LENGTH OF STAY

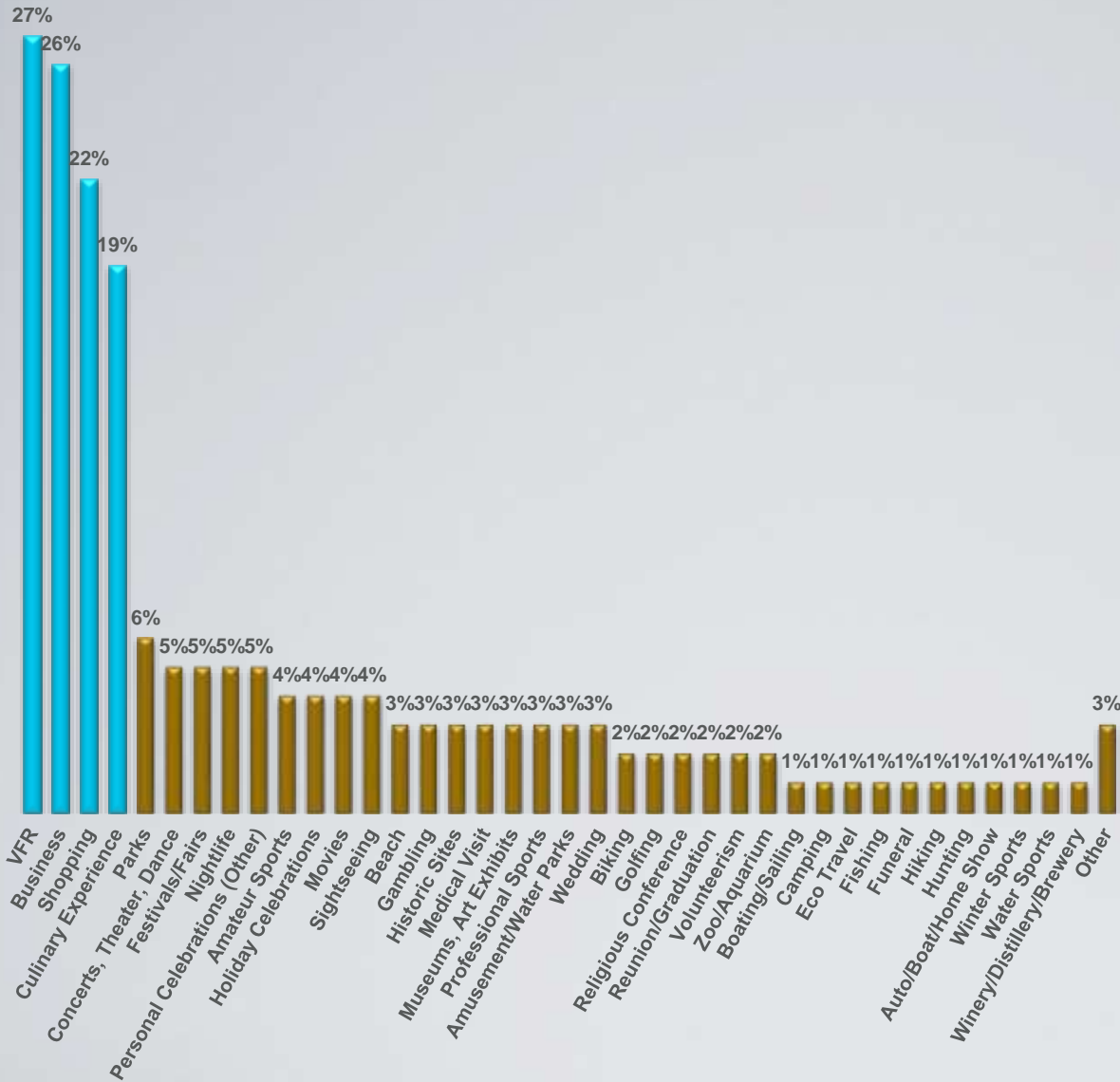
*Average Among Overnight Visitors:
2.3 Nights*



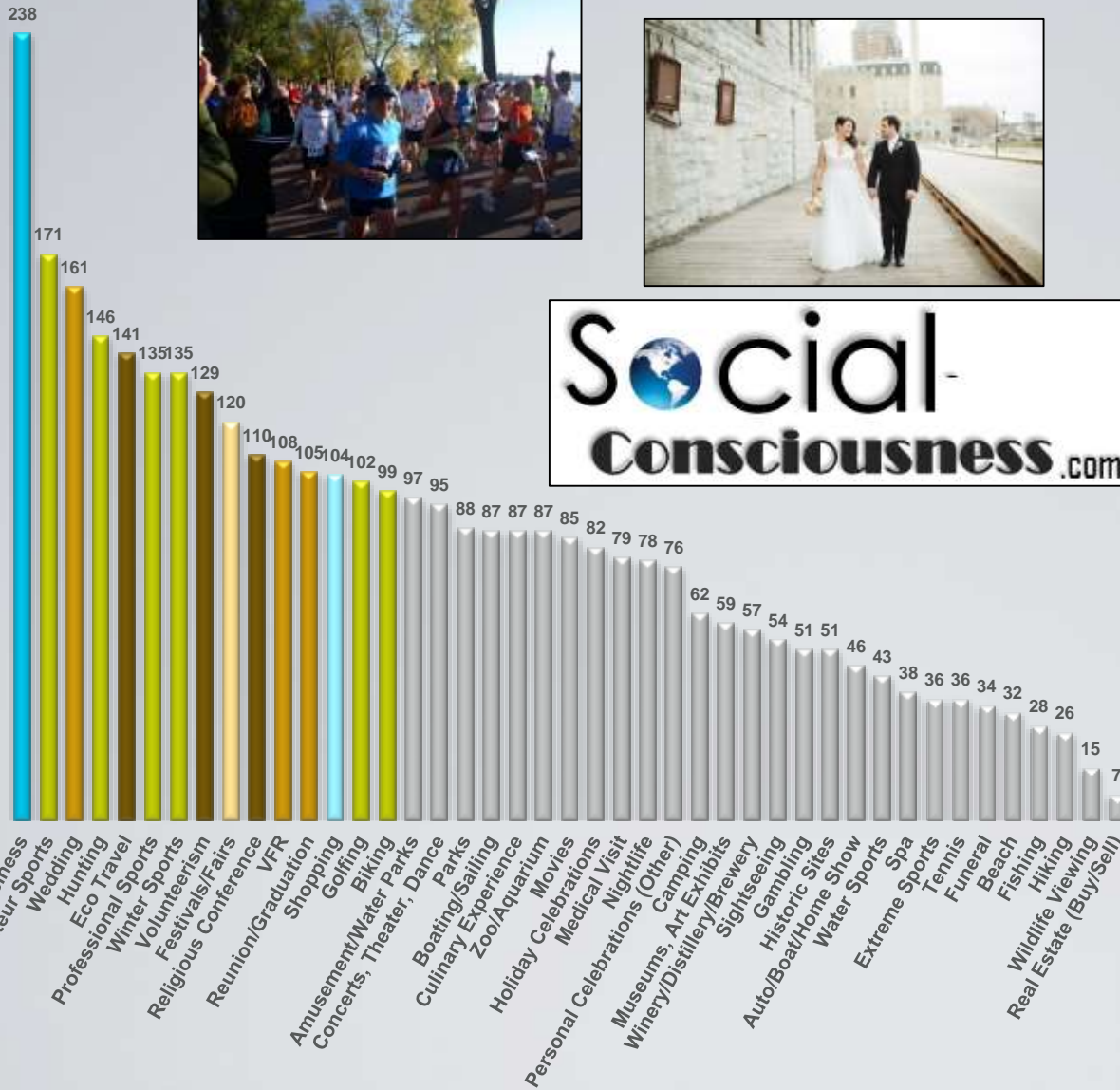
ACCOMMODATIONS



ACTIVITY PARTICIPATION



Source: D.K. Shifflet & Associates, Ltd. 2014
Stays Based, n = 1,512



ACTIVITY PARTICIPATION INDEXED TO TOTAL U.S.

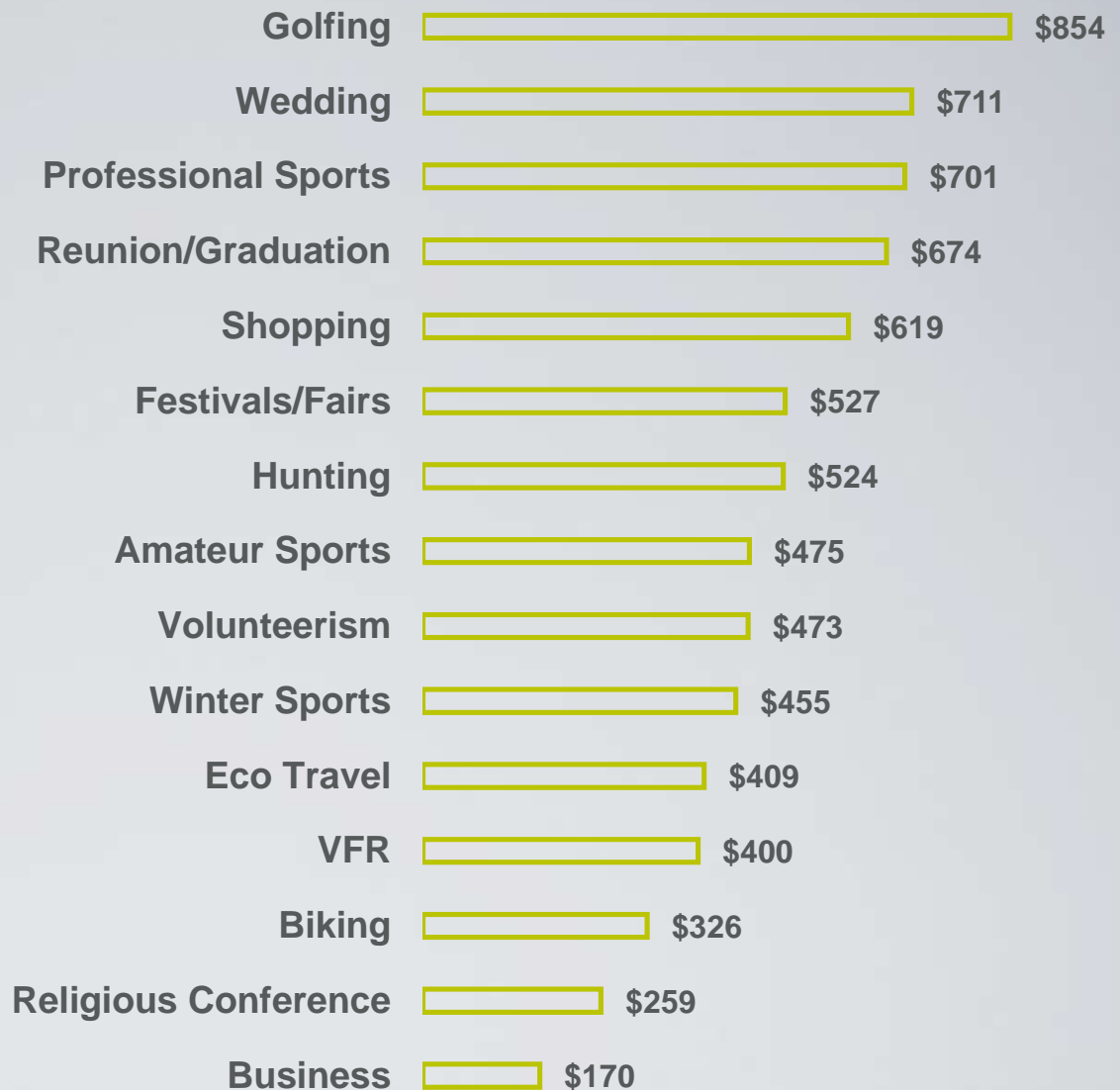


■ Millennials ■ Gen Xers ■ Boomers



ACTIVITY PARTICIPATION INDEXED TO ALL MSP VISITORS BY GENERATION

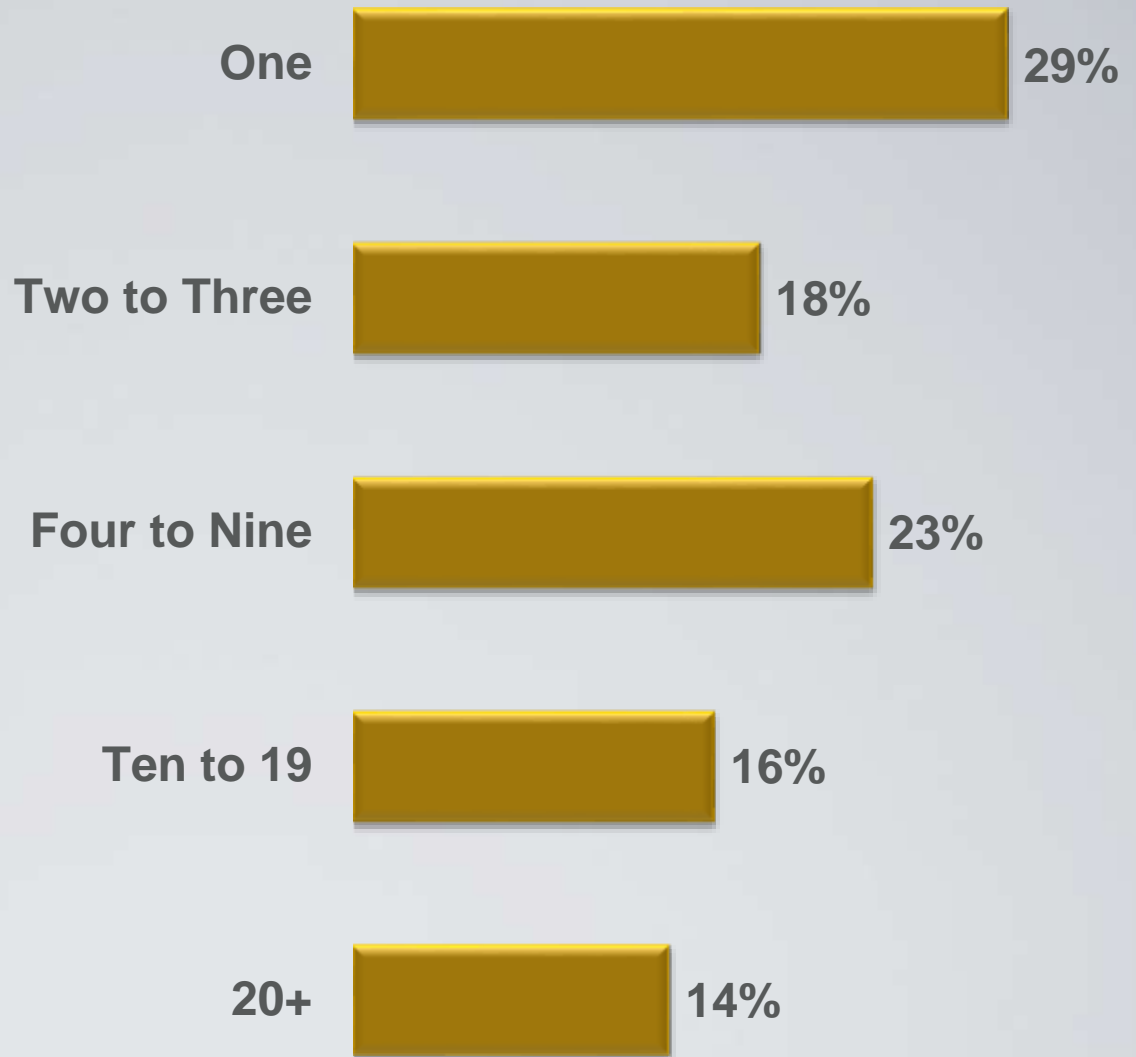
SPENDING BY ACTIVITY



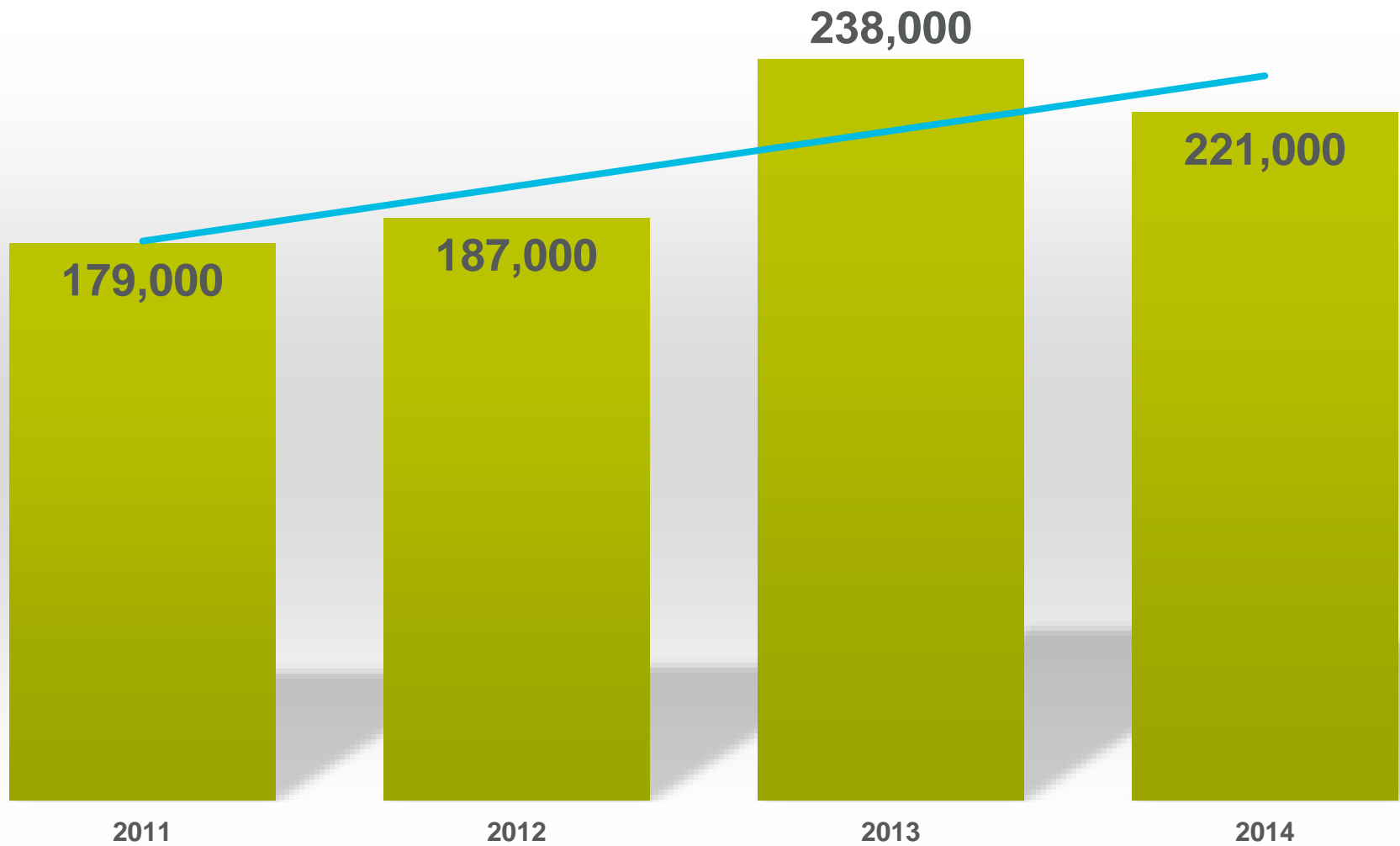
NUMBER OF VISITS IN PAST THREE YEARS

Average: 9.2

71% Repeat Rate
(67% U.S. Average)



INTERNATIONAL VISITORS TO MINNEAPOLIS



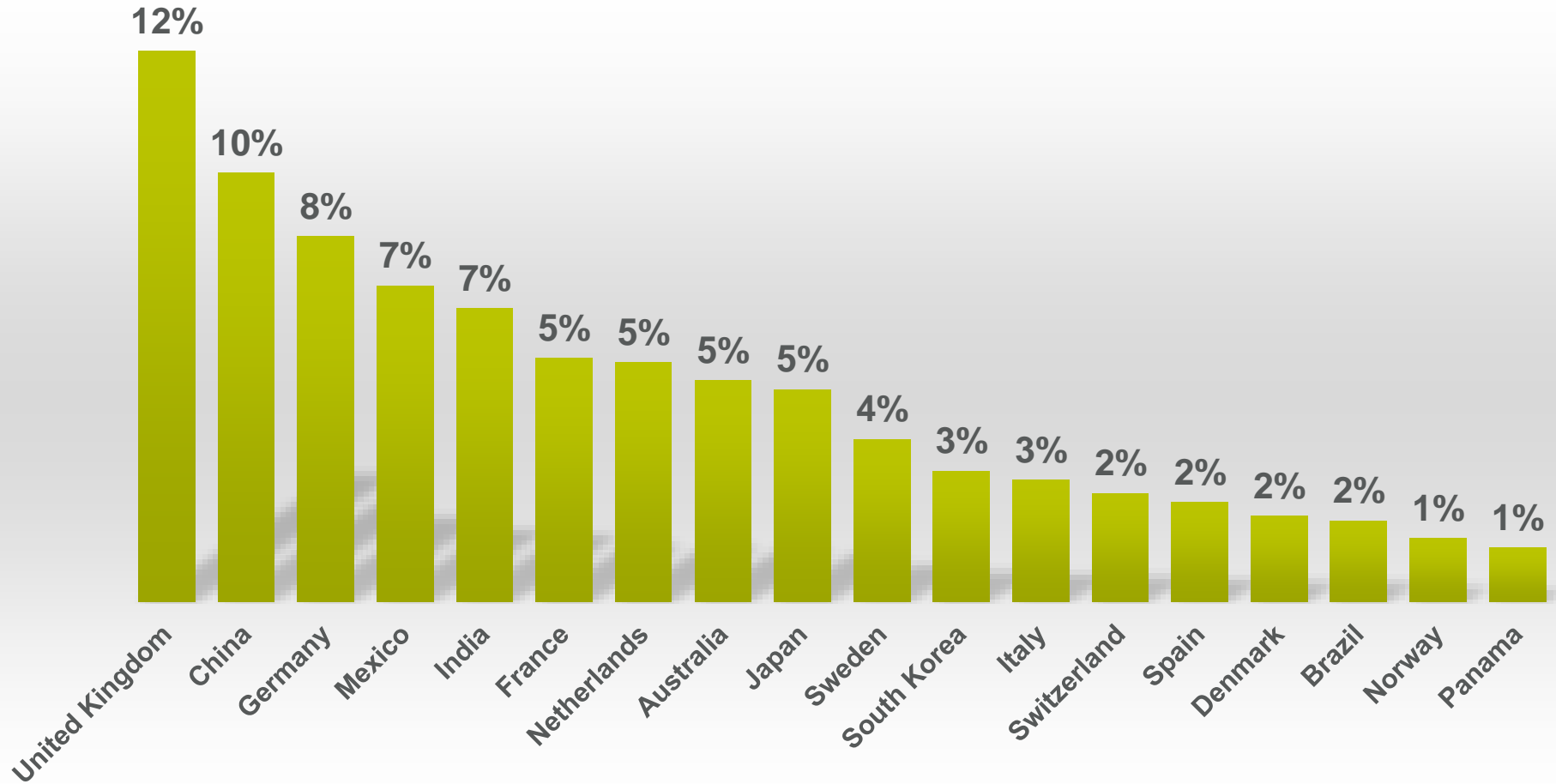
Source: National Travel and Tourism Office, U.S. Department of Commerce



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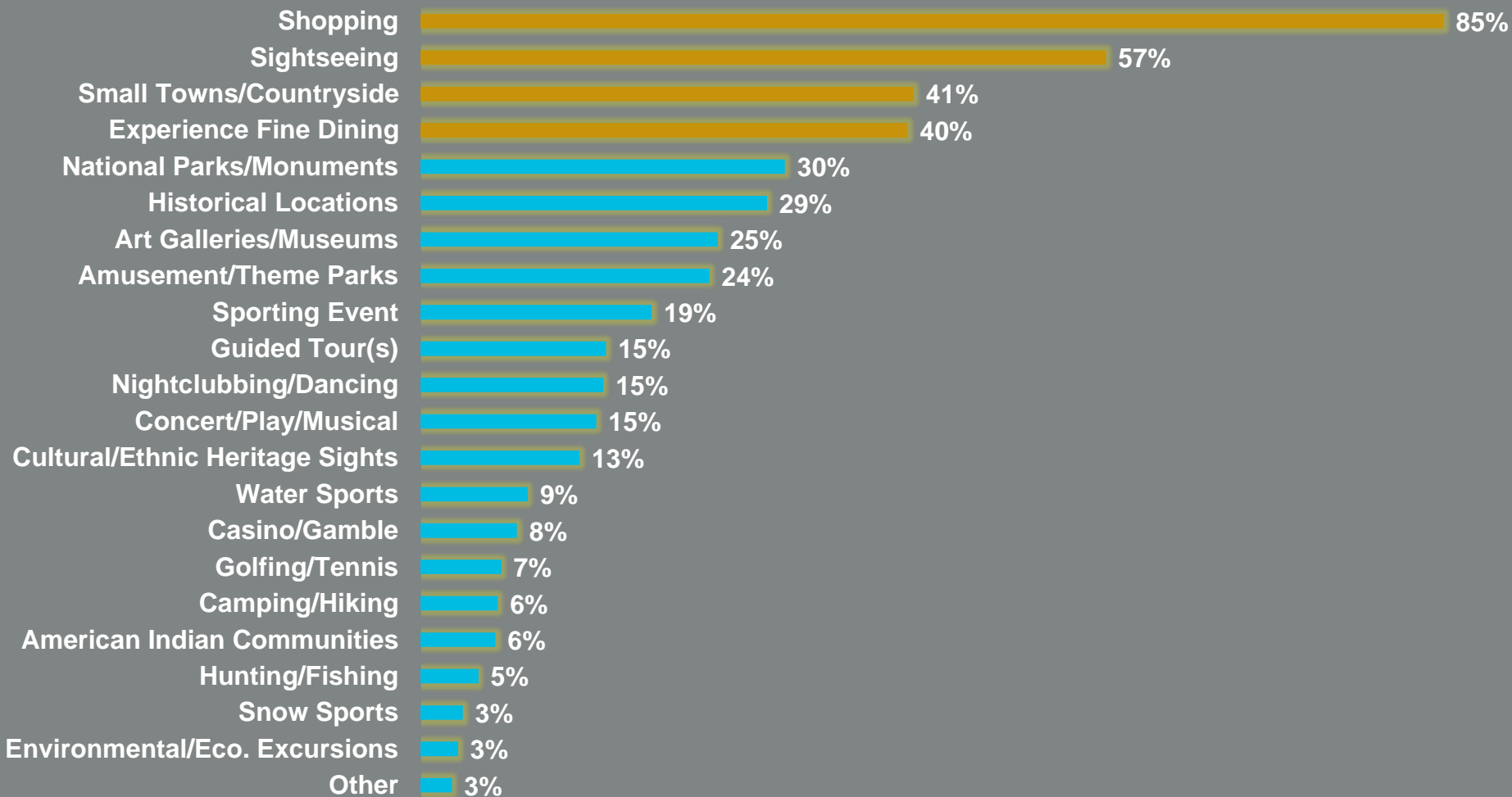
Meet Minneapolis
Convention & Visitors Association

MINNEAPOLIS INTERNATIONAL VISITORS BY COUNTRY OF RESIDENCE 2014



Source: National Travel and Tourism Office, U.S. Department of Commerce
Countries of Less than 1% Not Displayed
n = 877

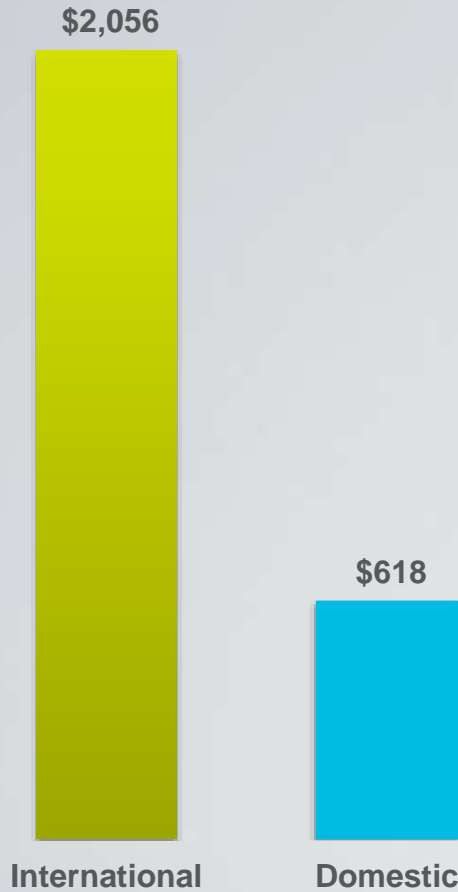
MINNEAPOLIS INTERNATIONAL VISITORS ACTIVITIES



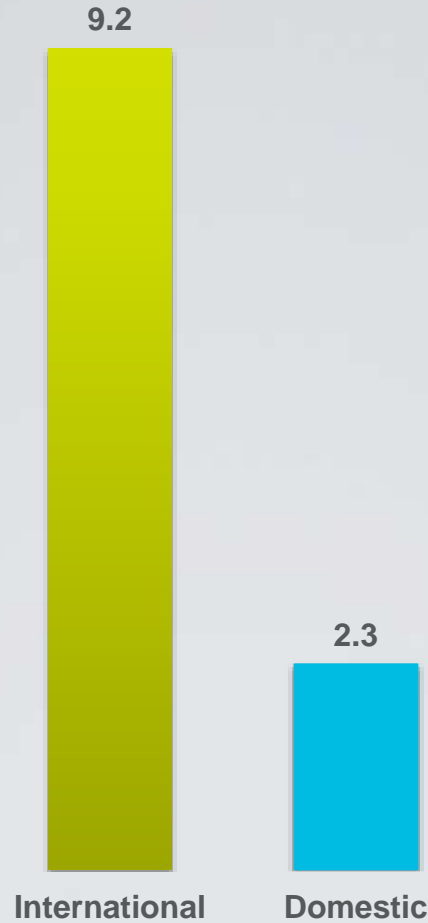
Source: National Travel and Tourism Office, U.S. Department of Commerce
n = 676

MINNEAPOLIS VISITORS: INTERNATIONAL VERSUS DOMESTIC

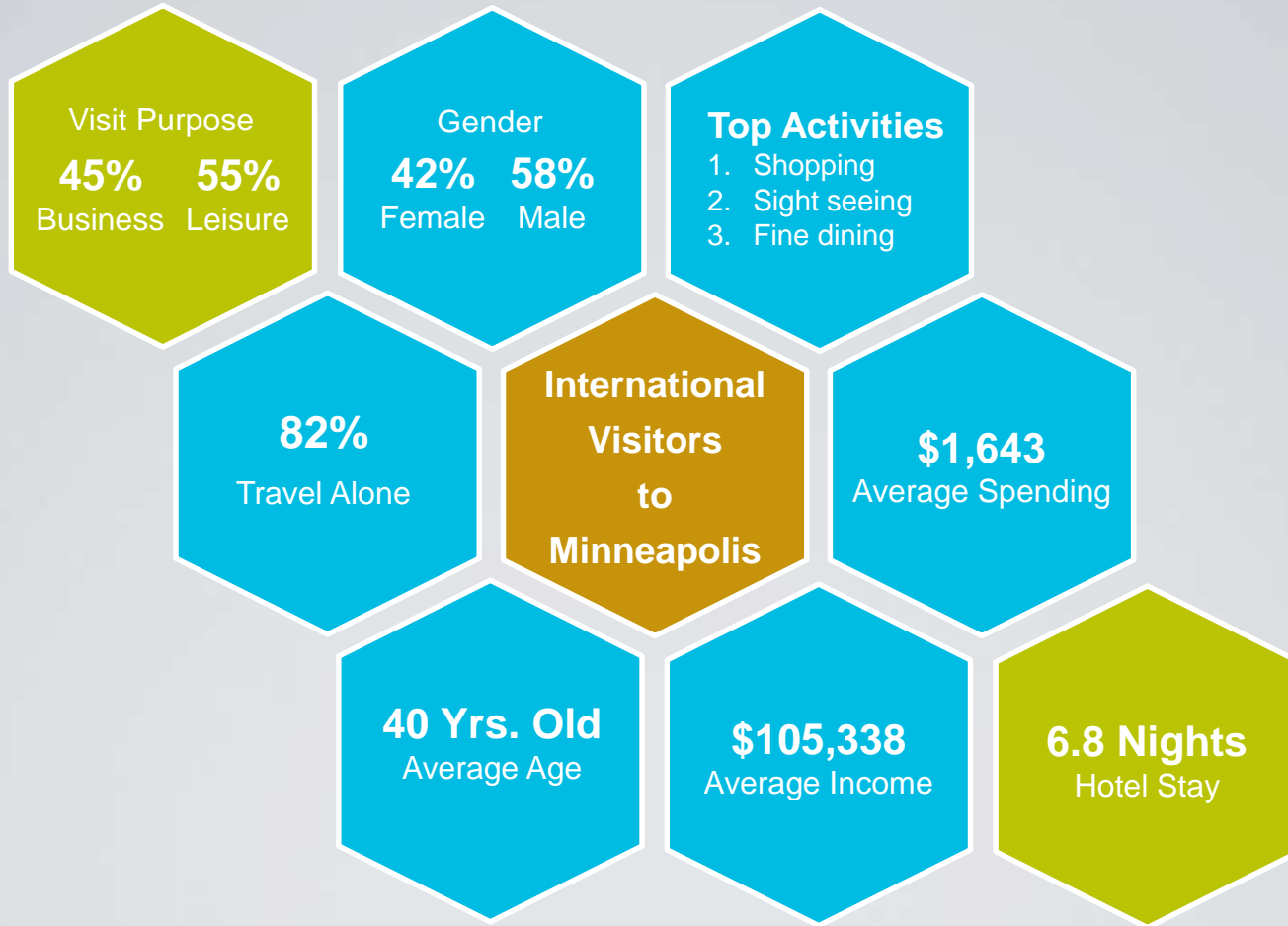
Average Spend Per Party



Average Number of Nights Stay



MINNEAPOLIS INTERNATIONAL VISITOR PROFILE



Source: National Travel and Tourism Office, U.S. Department of Commerce

THE VISITOR EXPERIENCE

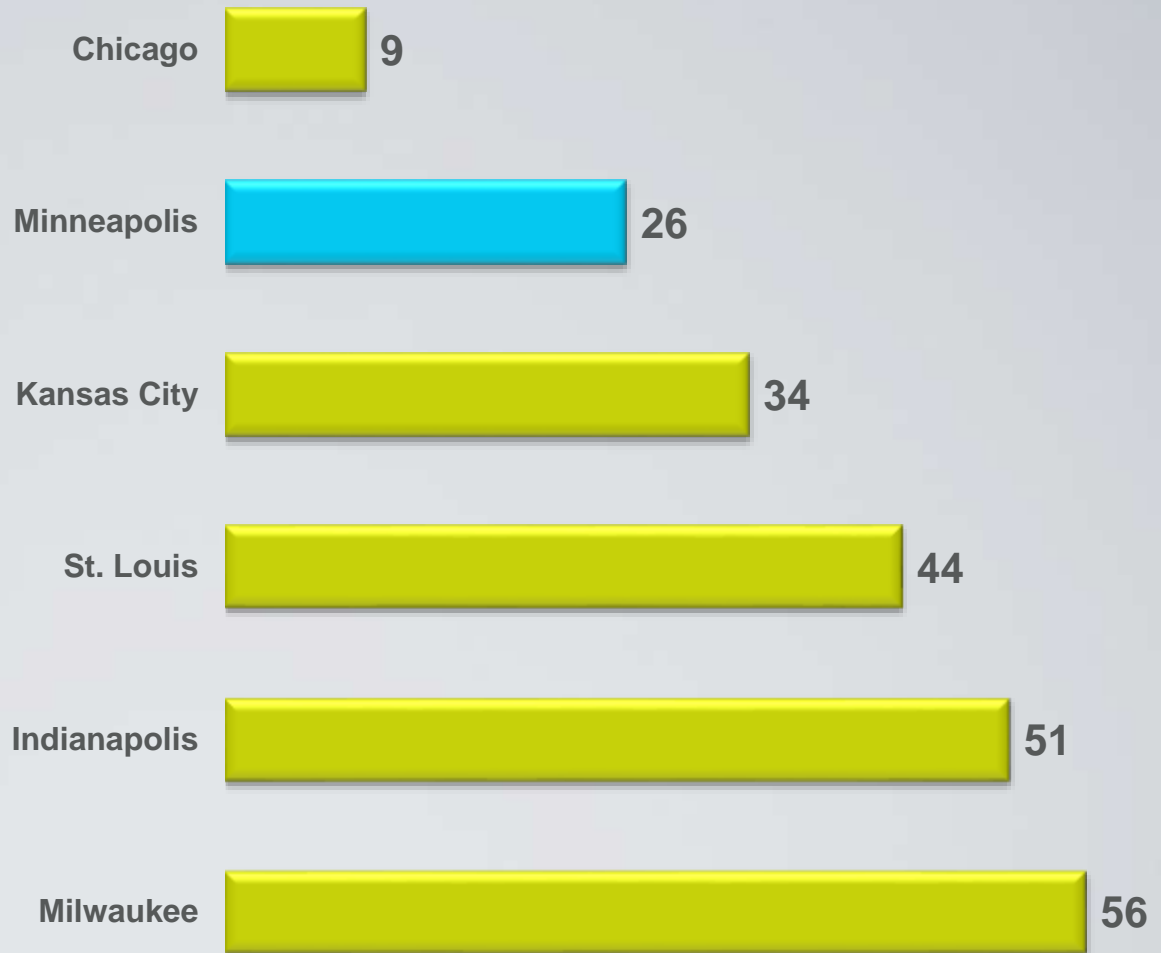


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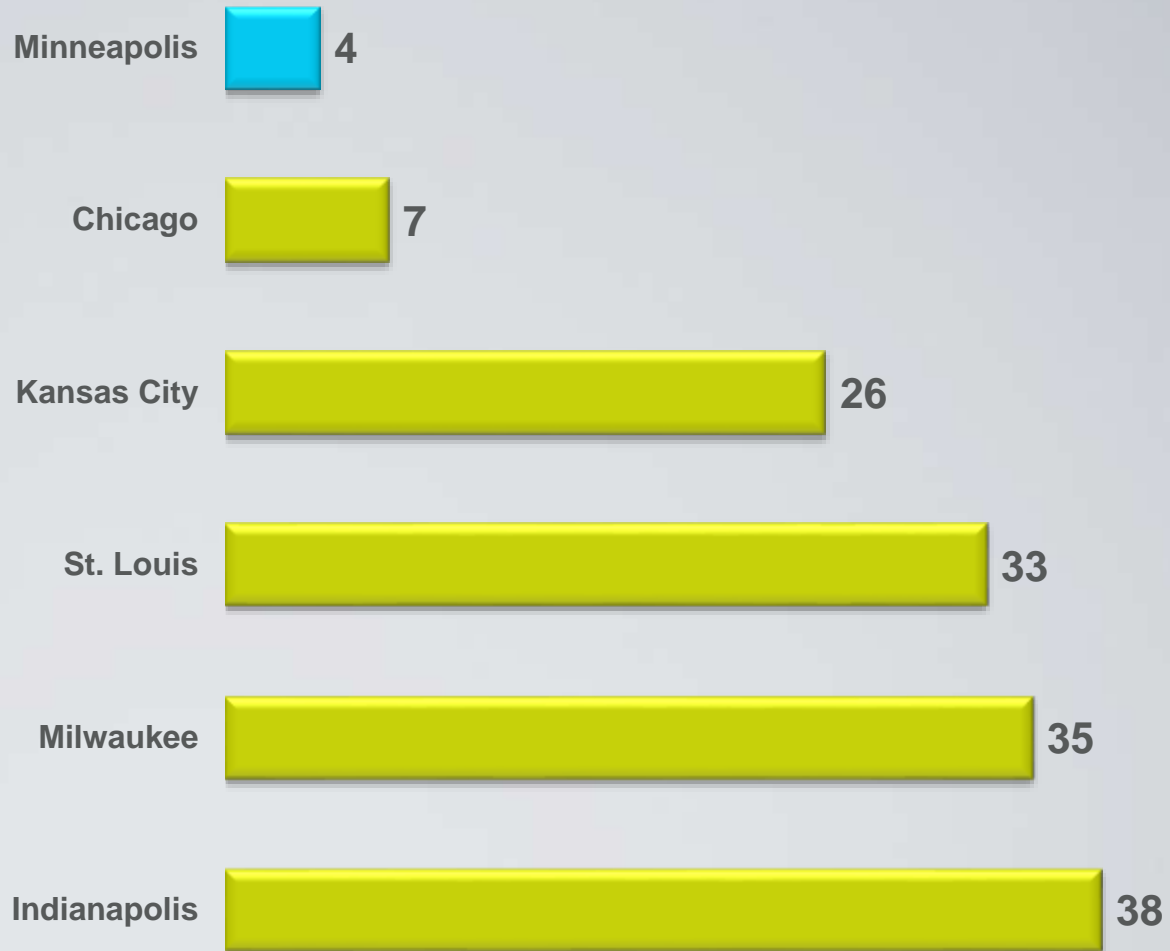
OVERALL TOURISM QUALITY EXPERIENCE

Rank Among 121 American Cities¹ (Minneapolis and Peer Set)



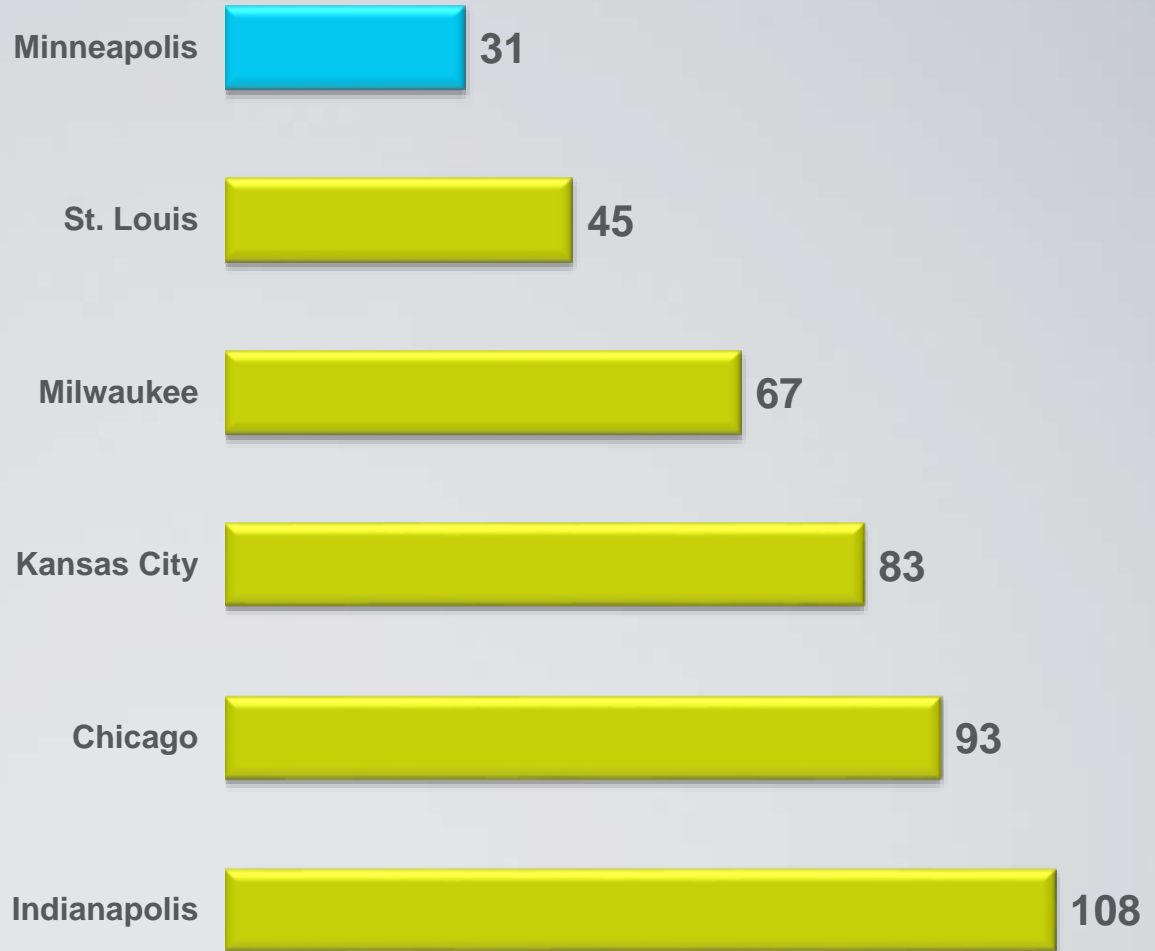
ARTS & ENTERTAINMENT QUALITY EXPERIENCE

Rank Among 121 American Cities¹
(Minneapolis and Peer Set)



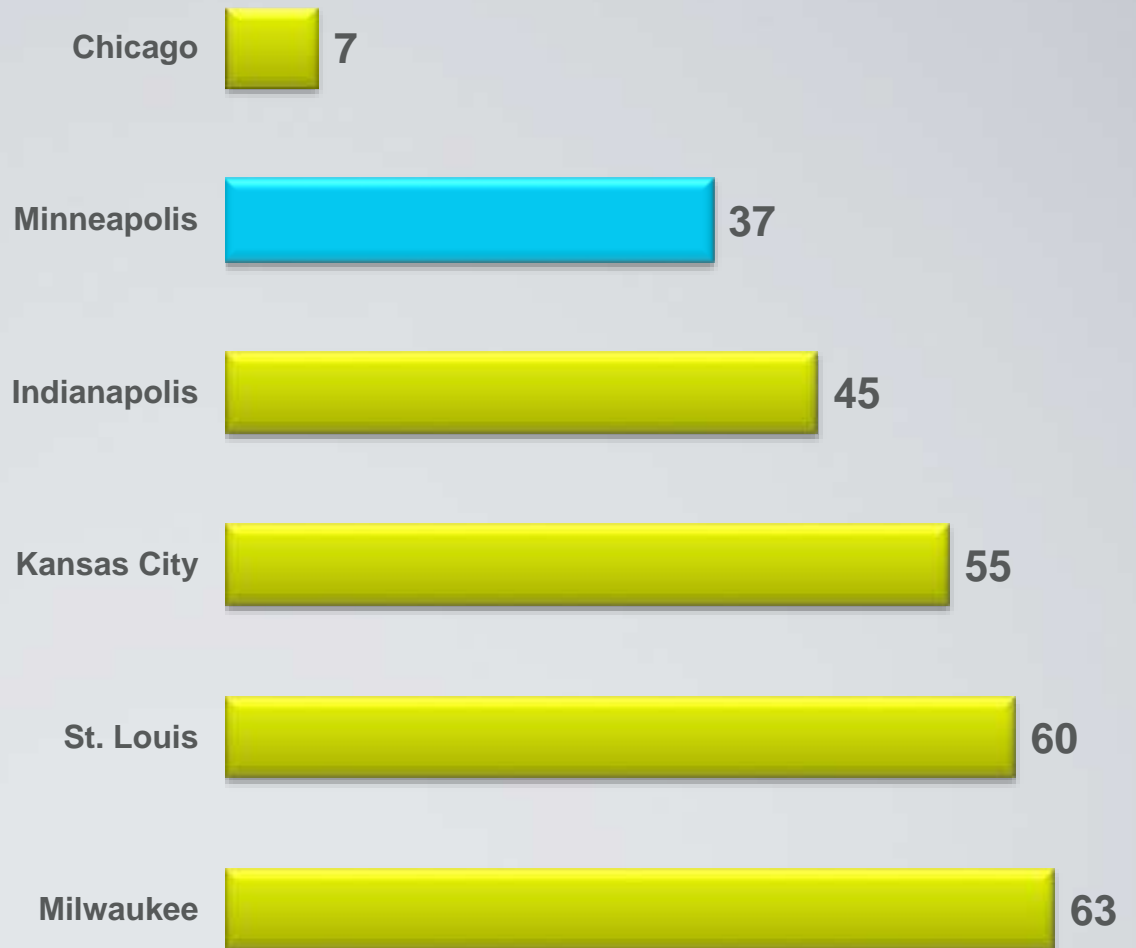
NATURE & PARKS QUALITY EXPERIENCE

Rank Among 121 American Cities¹ (Minneapolis and Peer Set)



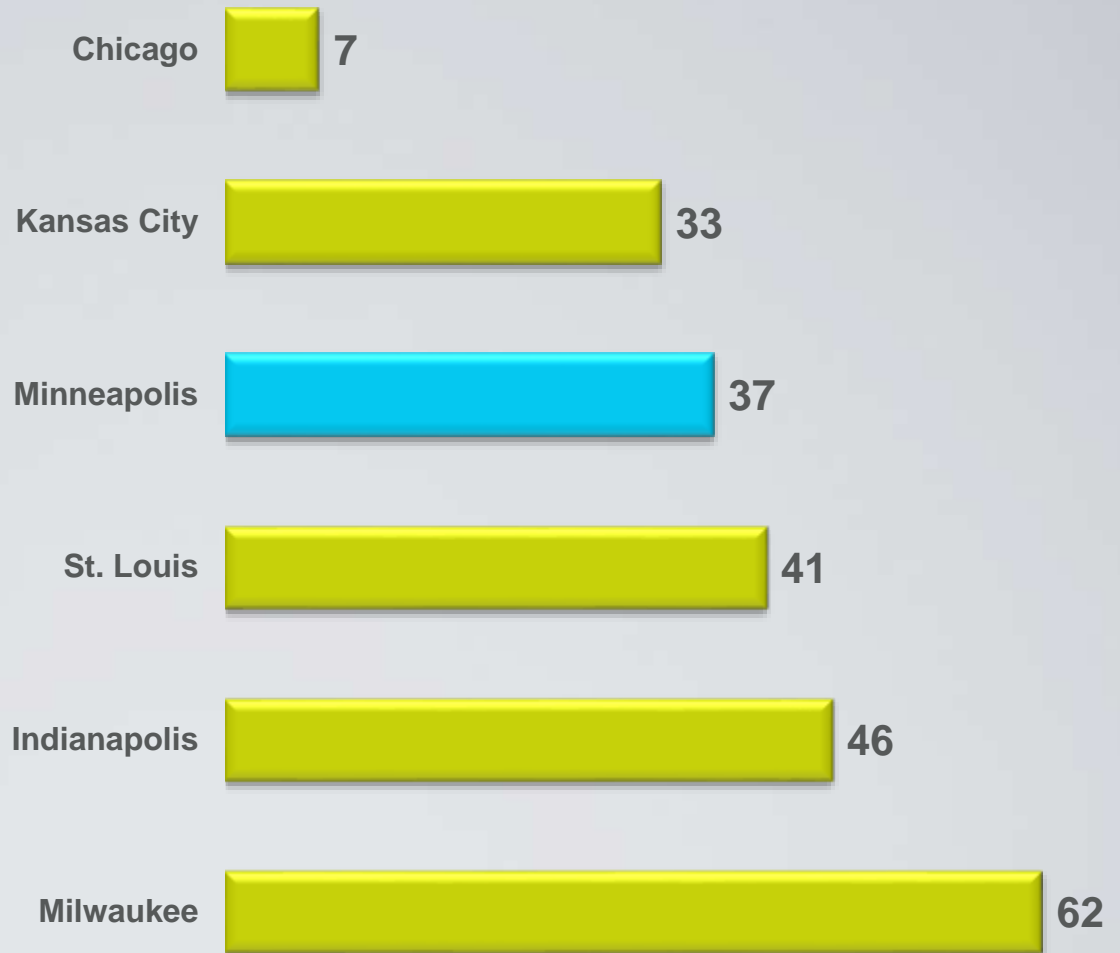
RESTAURANTS QUALITY EXPERIENCE

Rank Among 121 American Cities¹ (Minneapolis and Peer Set)



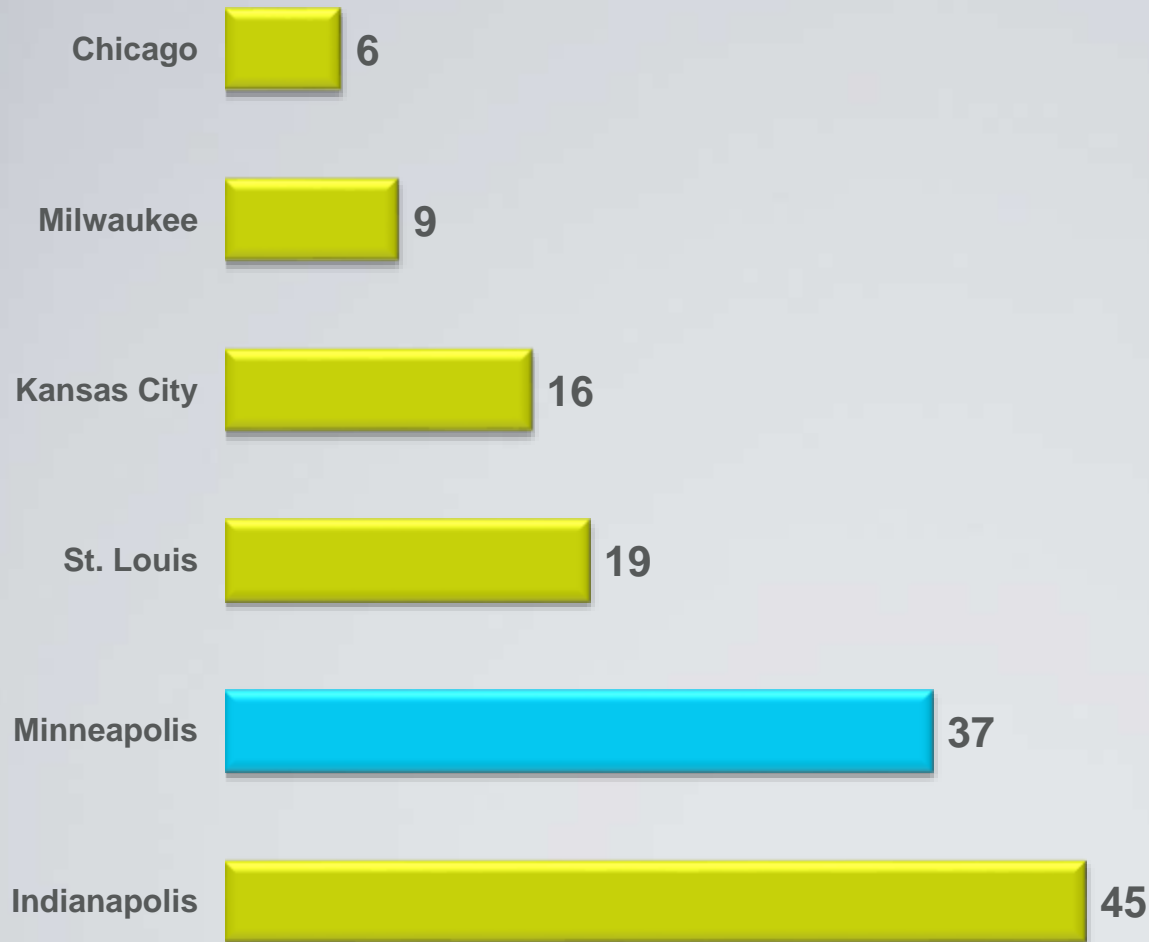
SHOPPING QUALITY EXPERIENCE

Rank Among 121 American Cities¹ (Minneapolis and Peer Set)



Rank Among 121 American Cities¹ (*Minneapolis and Peer Set*)

NIGHTLIFE QUALITY EXPERIENCE



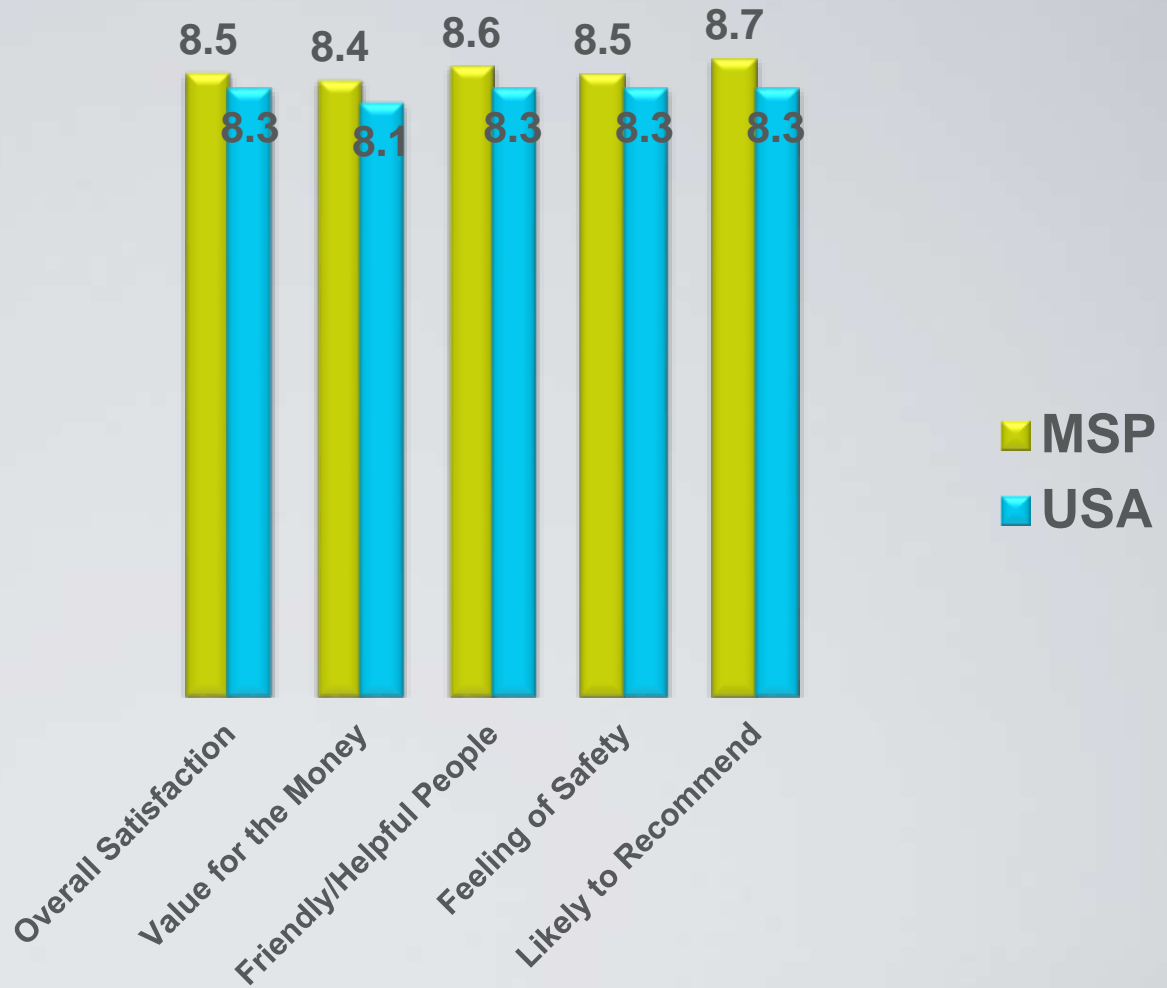
Rank Among 121 American Cities¹ (*Minneapolis and Peer Set*)



HOTELS QUALITY EXPERIENCE

DESTINATION RATINGS 2014

Average on Ten Point Scale
10 = Excellent to 1 = Poor



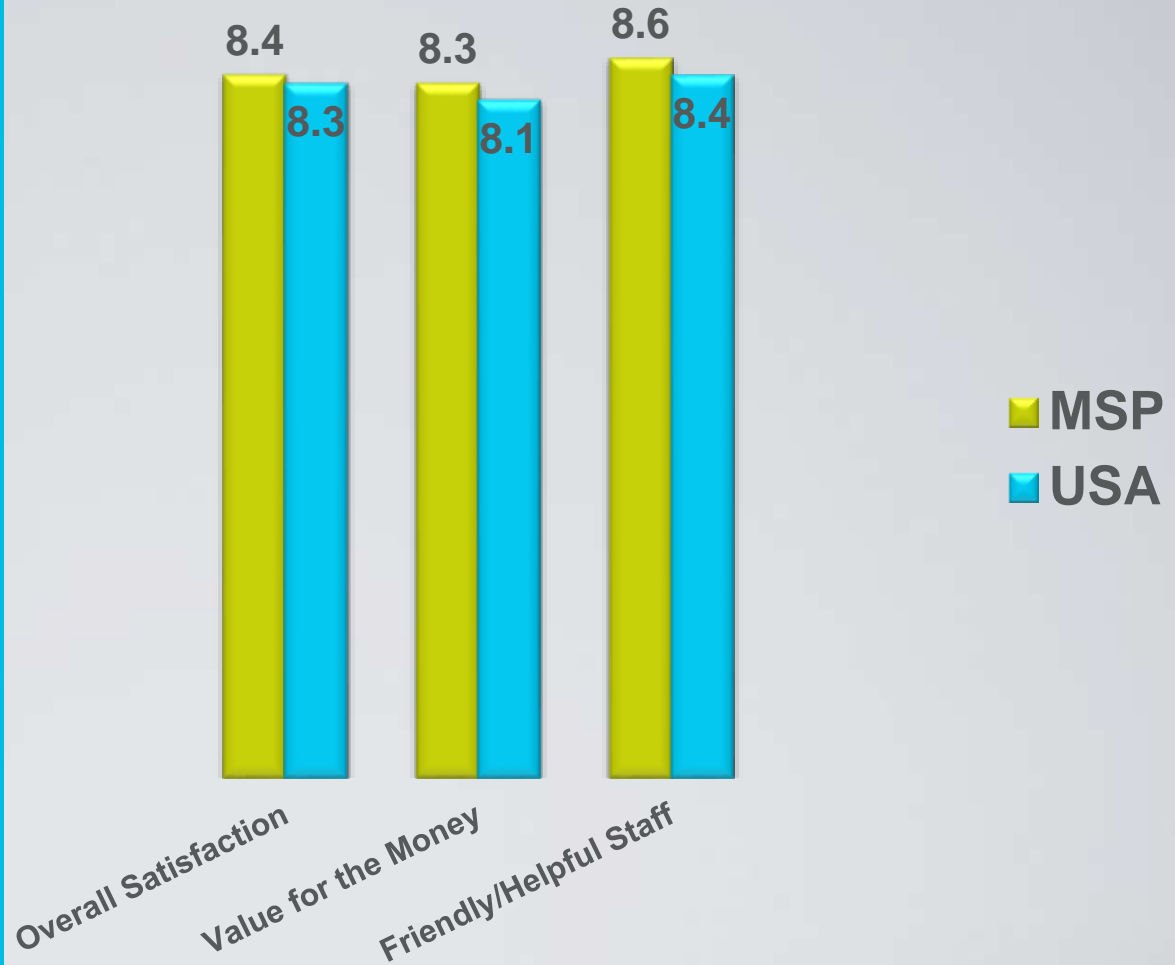
ACCOMODATIONS

NUMBER OF HOTEL ROOMS



HOTEL RATINGS 2013 -2014

Average on Ten Point Scale
10 = Excellent to 1 = Poor



HOTEL STR PERFORMANCE METRICS FIVE- YEAR FORECAST

- Objective: To present the downtown Minneapolis hotels' STR performance metrics':
 - *1999 – 2014 Historical Trend*
 - *2015 – 2019 Forecast*
- Methodology:
 - *Examined the forecasts of HVS, PKF, PWC, STR and TravelClick.*
 - *Applied judgment to these estimates to develop a forecast specific to Minneapolis.*
- The variance of the actual 2014 metrics relative to the 2014 forecast is reported as well.



SUPPLY

US	2015	2016
PKF 2015	1.1%	1.7%
PWC 2015	1.3%	2.2%
STR 2015	1.2%	1.4%

PKF Sep-Nov 2015: MSP	
2015	1.0%
2016	3.9%
2017	3.5%
2018	2.4%
2019	2.3%

New Inventory

2015

- Hampton 211 Rooms

2016

- AC Marriott 244 Rooms
- Renaissance Depot 100 Rooms
- DoubleTree at "U" 140 Rooms
- Embassy Suites 290 Rooms
- Holiday Inn Exp 135 Rooms

2017

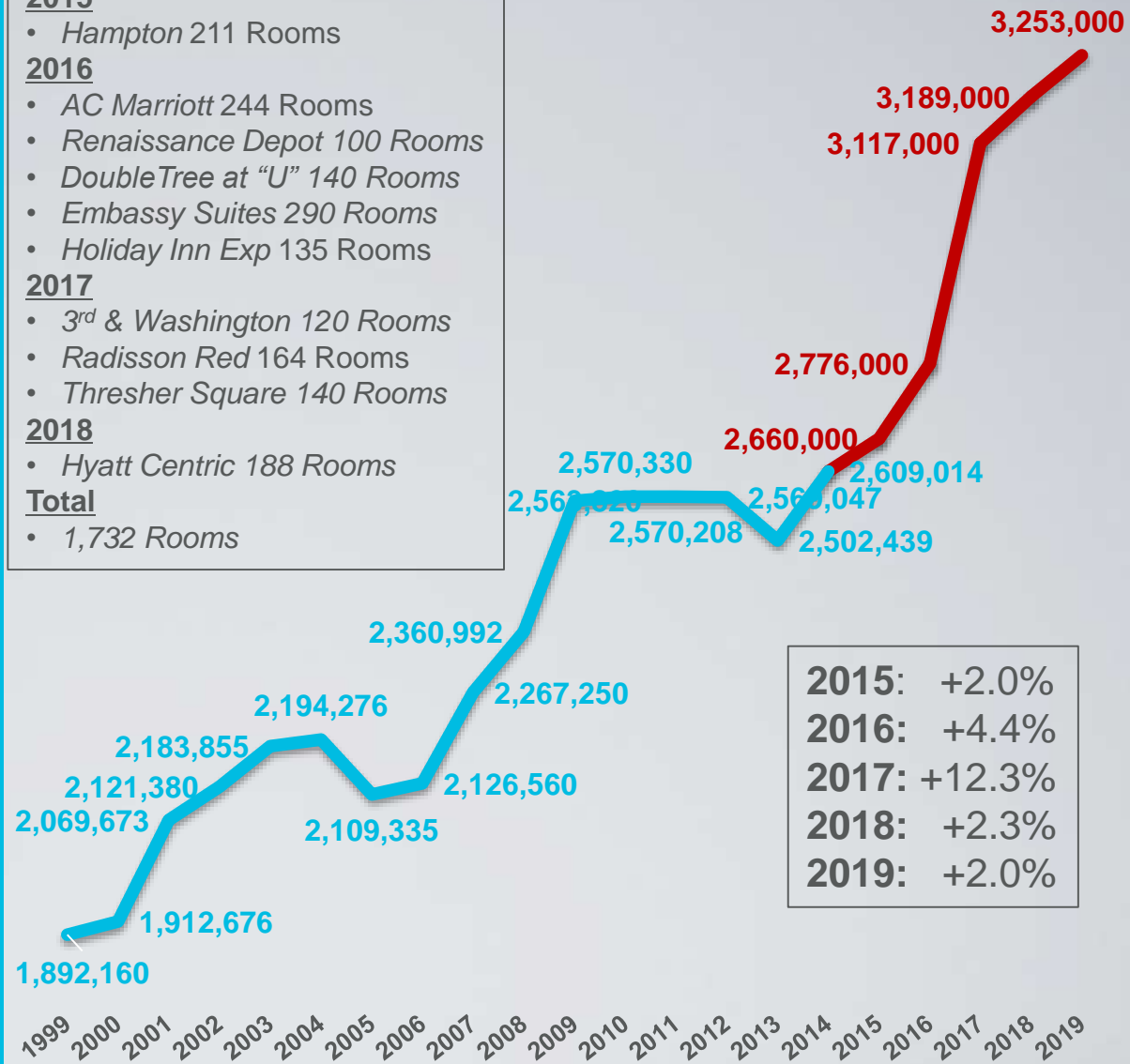
- 3rd & Washington 120 Rooms
- Radisson Red 164 Rooms
- Thresher Square 140 Rooms

2018

- Hyatt Centric 188 Rooms

Total

- 1,732 Rooms



2015:	+2.0%
2016:	+4.4%
2017:	+12.3%
2018:	+2.3%
2019:	+2.0%

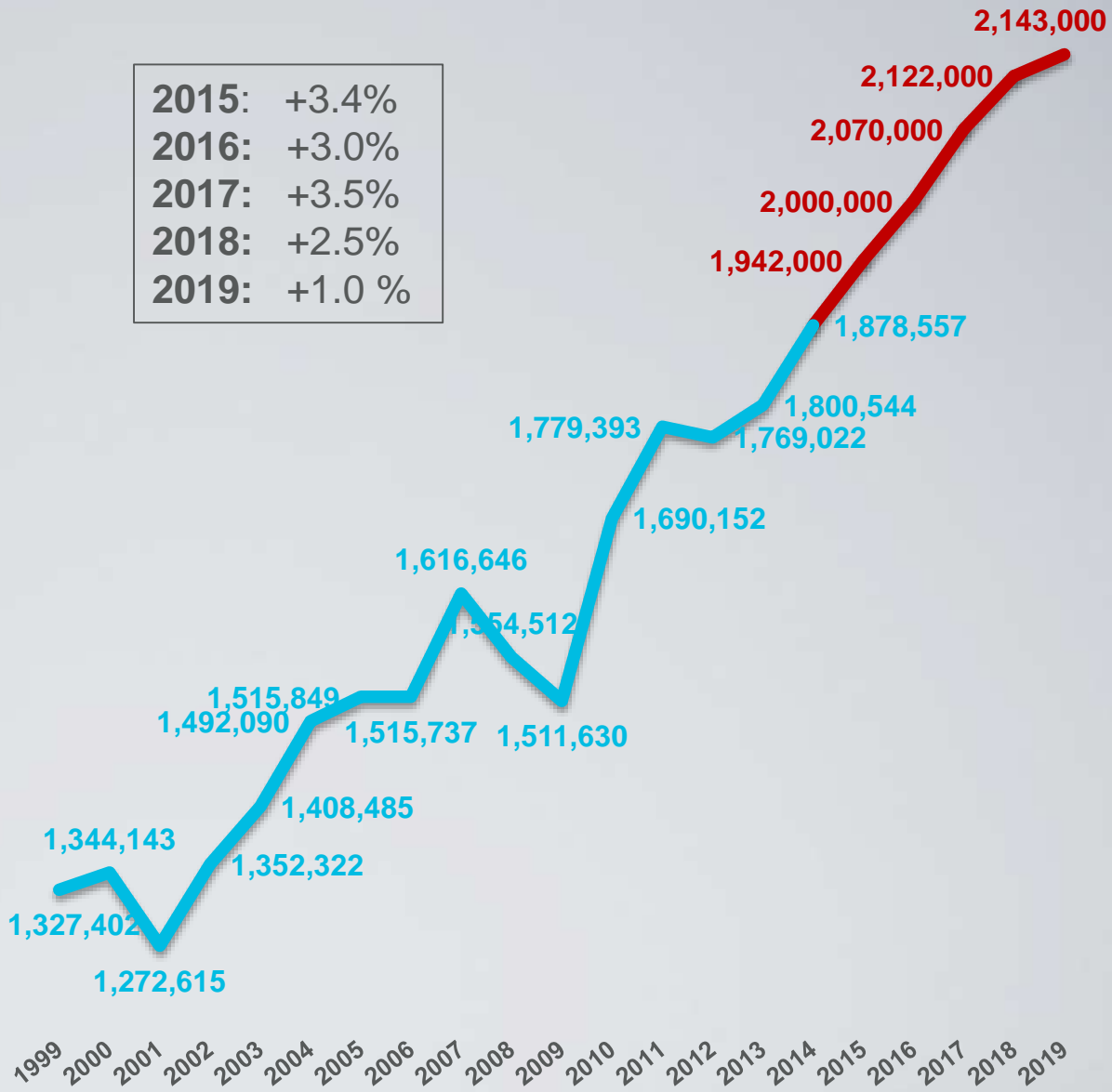
Sources: STR, Inc., PKF, PWC and Meet Minneapolis

DEMAND

US	2015	2016
PKF 2015	3.4%	1.9%
PWC 2015	3.3%	2.3%
STR 2015	2.9%	2.2%

PKF Sep-Nov 2015: MSP	
2015	1.3%
2016	3.1%
2017	3.5%
2018	2.6%
2019	1.2%

2015:	+3.4%
2016:	+3.0%
2017:	+3.5%
2018:	+2.5%
2019:	+1.0 %

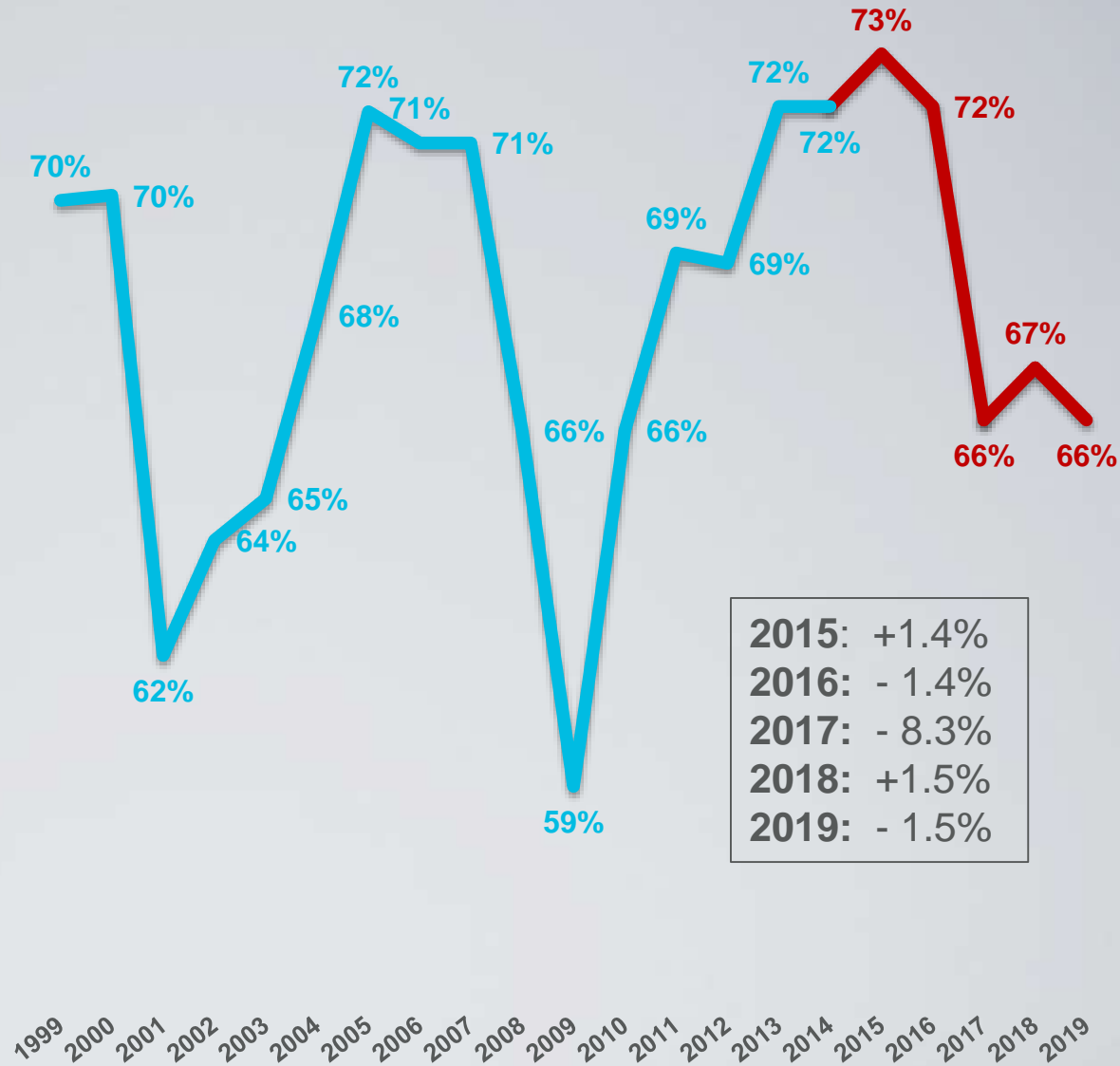


Sources: STR, Inc., PKF, PWC and Meet Minneapolis

OCCUPANCY

US	2015	2016
PKF 2015	1.9%	0.6%
PWC 2015	1.9%	0.1%
STR 2015	1.7%	0.8%

PKF Sep-Nov 2015: MSP	
2015	0.3%
2016	-0.8%
2017	0.0%
2018	0.2%
2019	-1.1%



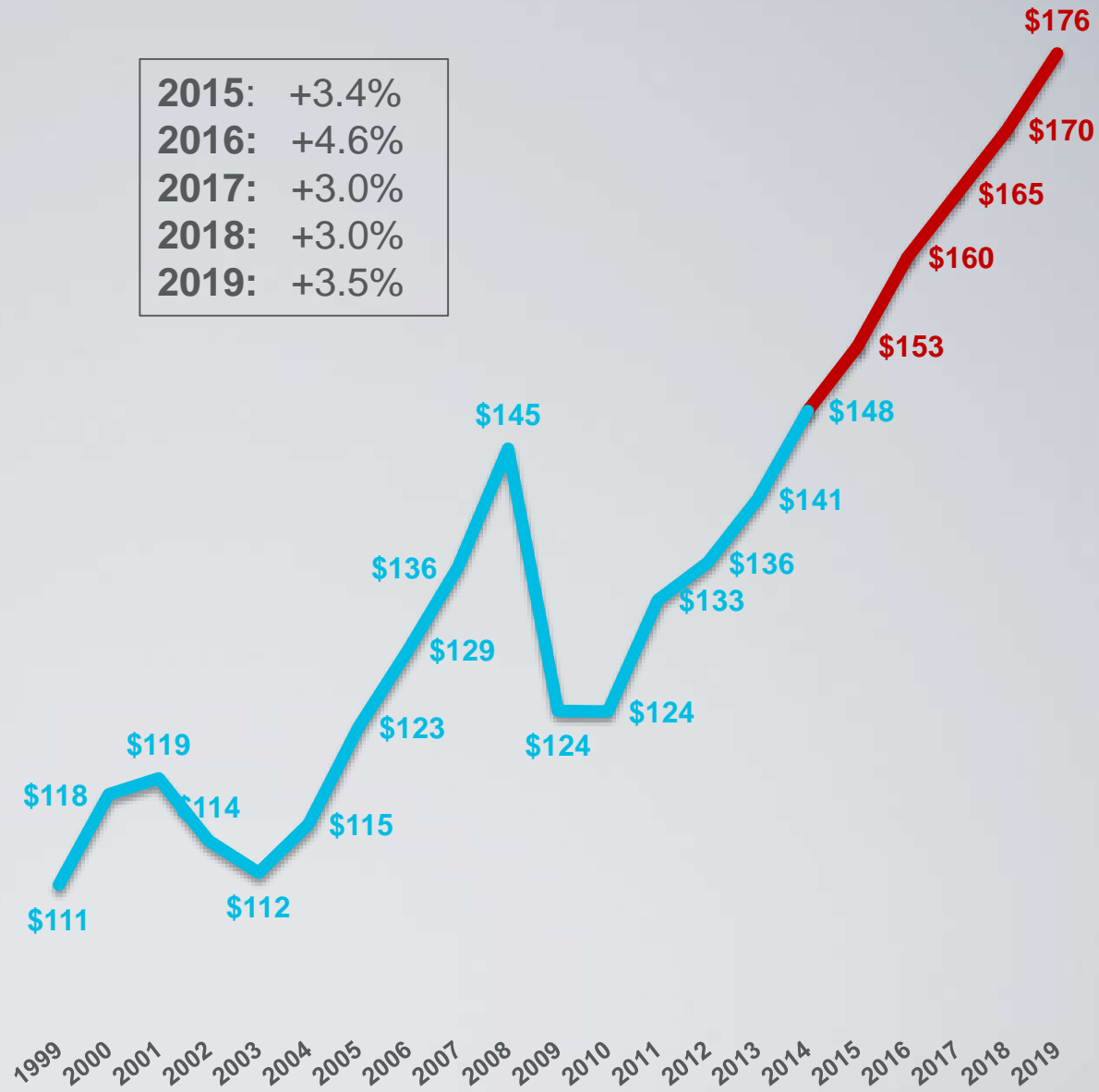
Sources: STR, Inc., PKF, PWC and Meet Minneapolis

ADR

US	2015	2016
PKF 2015	5.0%	6.1%
PWC 2015	5.0%	6.1%
STR 2015	5.1%	5.2%

PKF Sep-Nov 2015: MSP	
2015	3.6%
2016	4.7%
2017	4.4%
2018	5.5%
2019	4.1%

2015: +3.4%
2016: +4.6%
2017: +3.0%
2018: +3.0%
2019: +3.5%



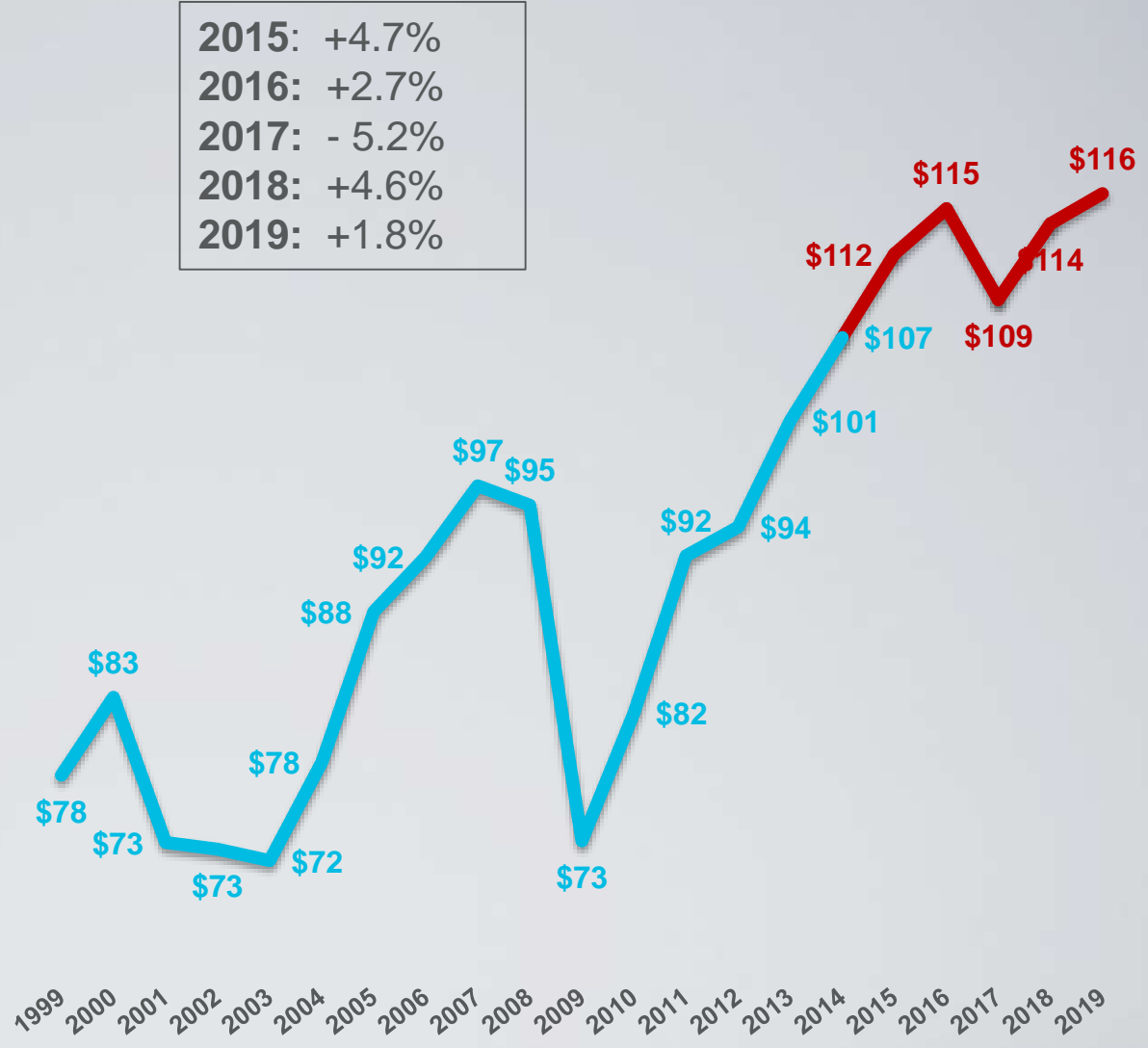
Sources: STR, Inc., PKF, PWC and Meet Minneapolis

REVPAR

US	2015	2016
PKF 2015	7.3%	6.3%
PWC 2015	7.0%	6.1%
STR 2015	6.8%	6.0%

PKF Sep-Nov 2015: MSP	
2015	3.8%
2016	3.9%
2017	4.4%
2018	5.7%
2019	3.0%

2015: +4.7%
2016: +2.7%
2017: - 5.2%
2018: +4.6%
2019: +1.8%



Sources: STR, Inc., PKF, PWC and Meet Minneapolis

MINNEAPOLIS LODGING SALES TAX REVENUE (MILLIONS)

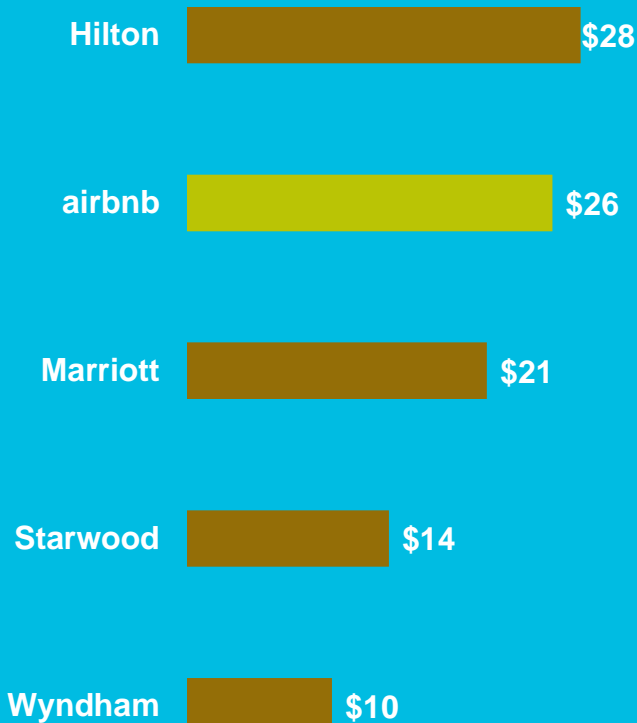


1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014

Source: City of Minneapolis

AIRBNB

Market Valuation (Billions)



- airbnb is the second largest hotel brand in the world following Hilton based on its market valuation at \$26 billion.
- The brand is forecasted to generate \$1 billion in revenue in 2015 and \$10 billion in 2020.
- The organization's goal is to create a "community-driven superbrand".
- *"This is a revolution created by everyone being connected to everyone else. We in the sharing economy represent what happens when the Internet moves into your neighborhood. I believe we're just in Chapter 2 of a really long book about this age."*

- Brian Chesky, CEO Airbnb



AIRBNB

- Merrill Lynch predicts that by 2017, combined hotel and airbnb room supply will outstrip demand and force a drop in hotel rates globally.

- Whereas, Morgan Stanley reports that the effect of airbnb on hotels will be minimal because:
 - ❑ It is geared more toward leisure than business
 - ❑ It also attracts customers from non-hotel categories such as bed & breakfasts, friends & family, vacation rentals, etc.
 - ❑ Its' steal of hotel demand hurts online travel agencies (OTAs) more than hotels
 - ❑ If airbnb begins to hurt hotel demand, hotels will likely start working directly with airbnb because it charges a 3% transaction fee versus the 12% to 18% charged by OTAs



AIRBNB

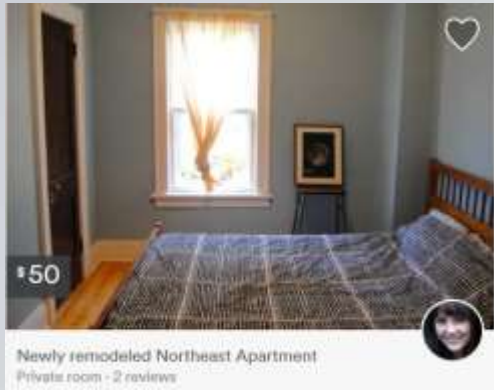
- In fact, some boutique hotels say they are using airbnb similarly to the way they use booking services like Expedia and Priceline: *“The commission is so much more attractive.”*

AIRBNB IN MINNEAPOLIS



Entire Home/Apt

- 306 Rentals
- \$170 Average Rate



Private Room

- 306 Rentals
- \$63 Average Rate



Shared Room

- 27 Rentals
- \$52 Average Rate

639 Rentals
Available

MINNEAPOLIS AIRBNB ESTIMATED RENTAL REVENUE

\$8 Million in Revenue Represents about a 2.5% Share of the Downtown Hotel Market (\$300 Million)

<u>Line Number</u>	<u>Variable</u>	<u>Value</u>	<u>Source</u>
1	# of Home/Apt Rental Units	306	airbnb
2	# of Days in the Year	365	
3	Annual Home/Apt Rental Unit Supply	111,690	Line 1 * Line 2
4	Assumed Annual Occupancy	30%	See Footnote ¹
5	Estimated Annual Sold Room Nights	33,507	Line 3 * Line 4
6	Average Rate	\$170	airbnb
7	Estimated Annual Rental Revenue	\$5.7 Million	Line 5 * Line 6
Private Room Rental Units			
8	# of Private Room Rental Units	306	airbnb
9	# of Days in the Year	365	
10	Annual Private Room Rental Unit Supply	111,690	Line 8 * Line 9
11	Assumed Annual Occupancy	30%	See Footnote ¹
12	Estimated Annual Sold Room Nights	33,507	Line 10 * Line 11
13	Average Rate	\$63	airbnb
14	Estimated Annual Rental Revenue	\$2.1 Million	Line 12 * Line 13
Shared Room Rental Units			
15	# of Shared Room Rental Units	27	airbnb
16	# of Days in the Year	365	
17	Annual Shared Room Rental Unit Supply	9,855	Line 15 * Line 16
18	Assumed Annual Occupancy	30%	See Footnote ¹
19	Estimated Annual Sold Room Nights	2,957	Line 17 * Line 18
20	Average Rate	\$52	airbnb
21	Estimated Annual Rental Revenue	\$153,764	Line 19 * Line 20
Total Estimated Annual Rental Revenue		\$8.0 Million	Line 7 + Line 14 + Line 21

¹ Assumed annual occupancy is derived from the extreme low-end of the range of city airbnb occupancies displayed on page 50 of this document, given that Minneapolis is not considered one of the more profitable cities for airbnb.

OTHER MARKETS

City	Average Cost to Rent a One Bedroom Apt/Month	Average airbnb Revenue per Month	Average Monthly Occupancy	Number of Full Time One Bedroom Apt Rentals
Atlanta	\$965	\$1,793	69%	11
Brooklyn	\$1,963	\$2,559	66%	259
Los Angeles	\$1,770	\$2,007	61%	300
Miami	\$1,320	\$2,188	61%	34
San Diego	\$1,175	\$1,769	59%	80
Houston	\$1,073	\$1,830	59%	37
Austin	\$1,129	\$1,824	56%	52
Seattle	\$1,388	\$1,866	55%	134
Wash, D.C.	\$1,672	\$1,665	51%	182
Nashville	\$1,104	\$1,567	50%	53
Kansas City	\$786	\$1,322	50%	12
Portland	\$1,117	\$1,471	48%	113
Denver	\$1,253	\$1,443	48%	66
New Orleans	\$999	\$1,656	46%	40
Chicago	\$1,331	\$1,389	43%	130
Las Vegas	\$762	\$1,658	39%	44

Source: Shatford, Scott, "The Most Profitable Airbnb Cities in America", AIRDNA Airbnb Data and Analytics, August 11, 2015








ARTS & CULTURAL INSTITUTIONS



Minneapolis
City by Nature

Meet Minneapolis
Convention & Visitors Association

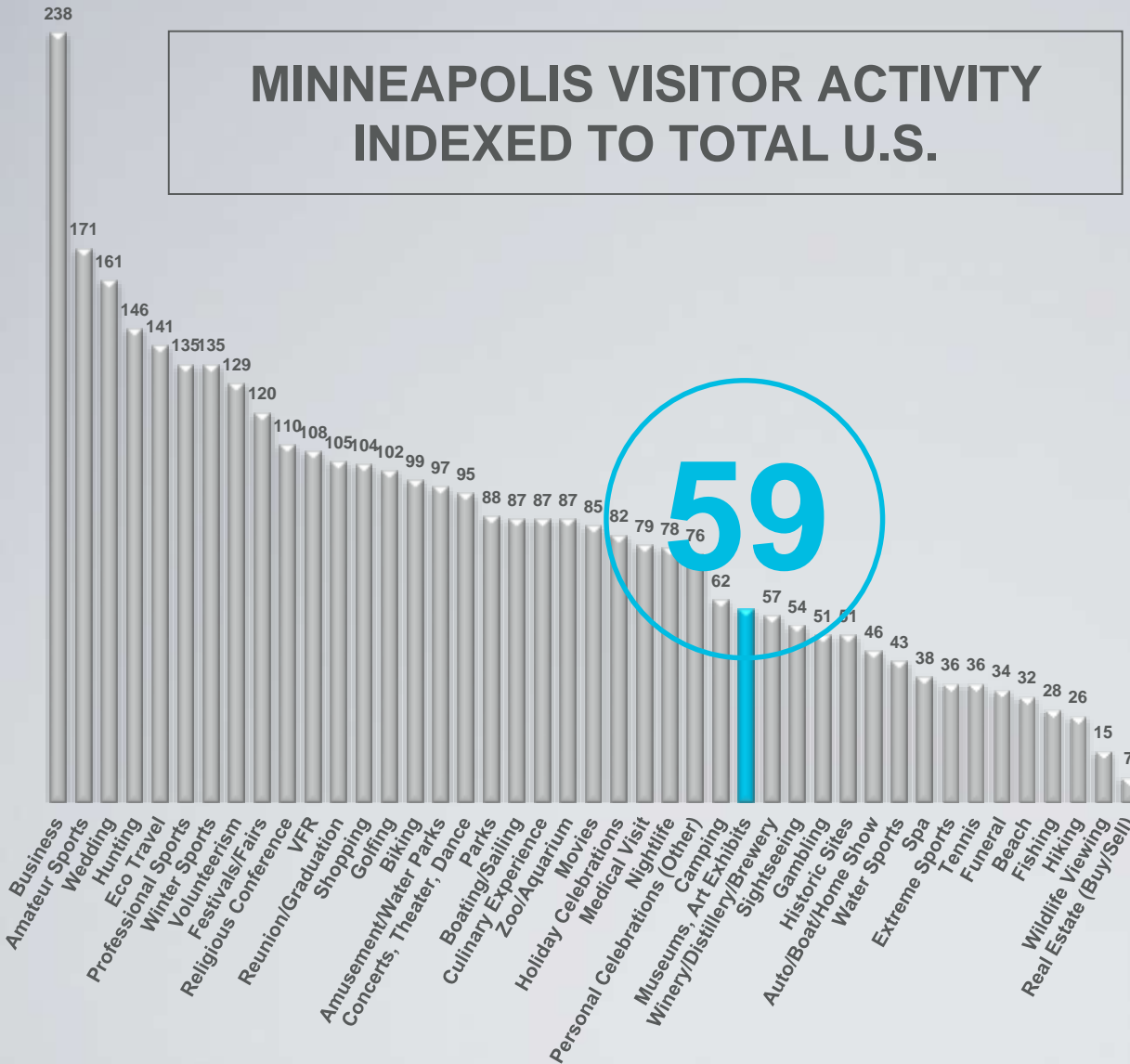
MUSEUMS

Museum	Mission	Brand	Attendance
American Swedish Institute	Themes of culture, migration, the environment and the arts, informed by enduring links to Sweden		64,000
Firefighters Hall and Museum	Historic items from Minnesota fire departments dating back to the 1860's		NA
Hennepin Overland Railway Museum	Entertainment and education for those interested in the history and operations of railroads		NA
James Ford Bell Museum	Minnesota's Natural History Museum		67,300
Katherine E. Nash Gallery (University of Minnesota)	Research laboratory for the practice and interpretation of the visual arts		NA
Mill City Museum	The intertwined histories of the flour industry, the river, and the city of Minneapolis		109,000
Minneapolis Institute of Arts	Outstanding works of art from the world's diverse cultures		645,000

MUSEUMS

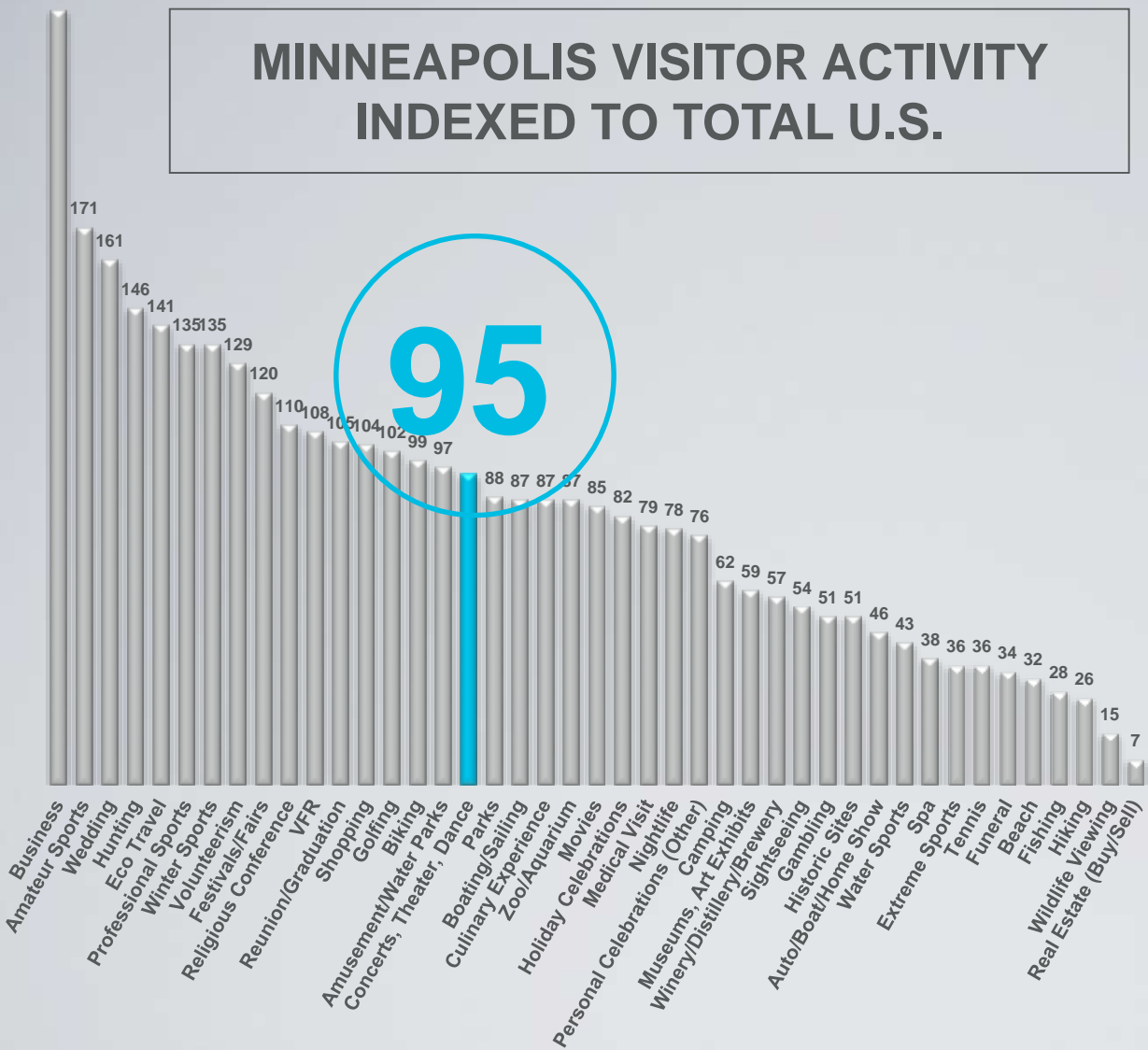
Museum	Mission	Brand	Attendance
Minnesota Streetcar Museum	The preservation of Minnesota's electric railway history		NA
The Bakken Library and Museum	A one-of-a-kind museum inspiring a passion for science and its potential for social good by helping people explore the history and nature of electricity and magnetism		42,000
The Museum of Russian Art	Education, Enlightenment and Engagement through the Art of Russia		40,000
Walker Art Center	Focusing on the visual, performing, and media arts of our time	WALKER	600,000
Weisman Art Museum	A teaching museum for the University of Minnesota and the community		150,000

MINNEAPOLIS VISITOR ACTIVITY INDEXED TO TOTAL U.S.







MINNEAPOLIS MUSEUMS ARE UNDERUTILIZED BY VISITORS

MINNEAPOLIS VISITOR ACTIVITY INDEXED TO TOTAL U.S.



**AS ARE
THEATER,
CONCERTS AND
DANCE**




THEATERS

Theater	Mission	Brand	Attendance
Brave New Workshop	Thought-provoking original comedy, improv and satire		NA
Children's Theater Company	Theatre experiences that educate, challenge and inspire young people and their communities		462,500
Guthrie Theater	An American center for theater performance, production, education and professional training; presenting both classical literature and new work from diverse cultures		500,000
Hennepin Theater Trust <i>(State, Orpheum, Pantages, New Century)</i>	Dedicated to arts-inspired community cultural development, we present a rich mix of live performances, creating inspiring arts education experiences and advancing a thriving Hennepin Avenue cultural district in downtown Minneapolis		NA
Illusion Theater	Theater that illuminates the illusions, myths and realities of our times and to catalyze personal and social change		NA

THEATERS

Theater	Mission	Brand	Attendance
In the Heart of the Beast Puppet and Mask Theater	To bring people together for the common good through the power of puppet and mask performance		NA
Mixed Blood Theater	Invites the global village into its audience and onto its stage for its unique brand of provocative, inclusive, and predictably unpredictable theater		NA
Penumbra Theater	Creates professional productions that are artistically excellent, thought provoking, and relevant and illuminates the human condition through the prism of the African American experience		NA
The Jungle Theater	To create powerful and poetic theater in the intimate Jungle home, which is deeply rooted in its Minneapolis neighborhood		NA

THEATERS

Theater	Mission	Brand	Attendance
The Southern Theater	A home for artists, giving them the freedom to focus their art. We add new value by fostering a community that serves the artist's need for stability, for a sense of place, for the opportunity to experiment and as a resource to learn and grow. We offer audiences a unique experience that ignites their imaginations and expands their perspectives in an extraordinary historical theater		NA
Theater Lattè Da	Combines music and story to illuminate the breadth of the human condition		NA
Theater in the Round	To provide significant entertainment and educational opportunities to its audiences on an arena stage		NA

CONCERTS & DANCE

Organization	Mission	Brand	Attendance
Minnesota Orchestra	To enrich, inspire and serve our community as a symphony orchestra internationally recognized for its artistic excellence		150,000
Minnesota Opera	One of America's largest opera companies, admired as an innovative creator of compelling operas, programs and new works		367,779
Arena Dances	A modern dance company performing the work of Mathew Janczewski. The work is abstract in form, giving shape to emotions, exploring the depths and the limits of what drives us as humans to connect, to break away, to survive		NA
The Cowles Center	A catalyst for the creation, performance, education and celebration of dance and the performing arts.		NA

CONCERTS & DANCE

Organization	Mission	Brand	Attendance
James Sewell Ballet	Re-imagines what a contemporary ballet company can look like: a chamber dance troupe that blends the elegance of classical ballet, the freedom of modern dance, and the can-do spirit of vaudeville		NA
Minnesota Dance Theater & School	To create masterful and inspiring dance through performance and education		NA
Tapestry Folkdance Center	To create opportunities for participating in the joys of dance and music from around the world		NA
Zenon Dance Company	Captivates audiences with a rare and dynamic blend of modern and jazz dance		NA

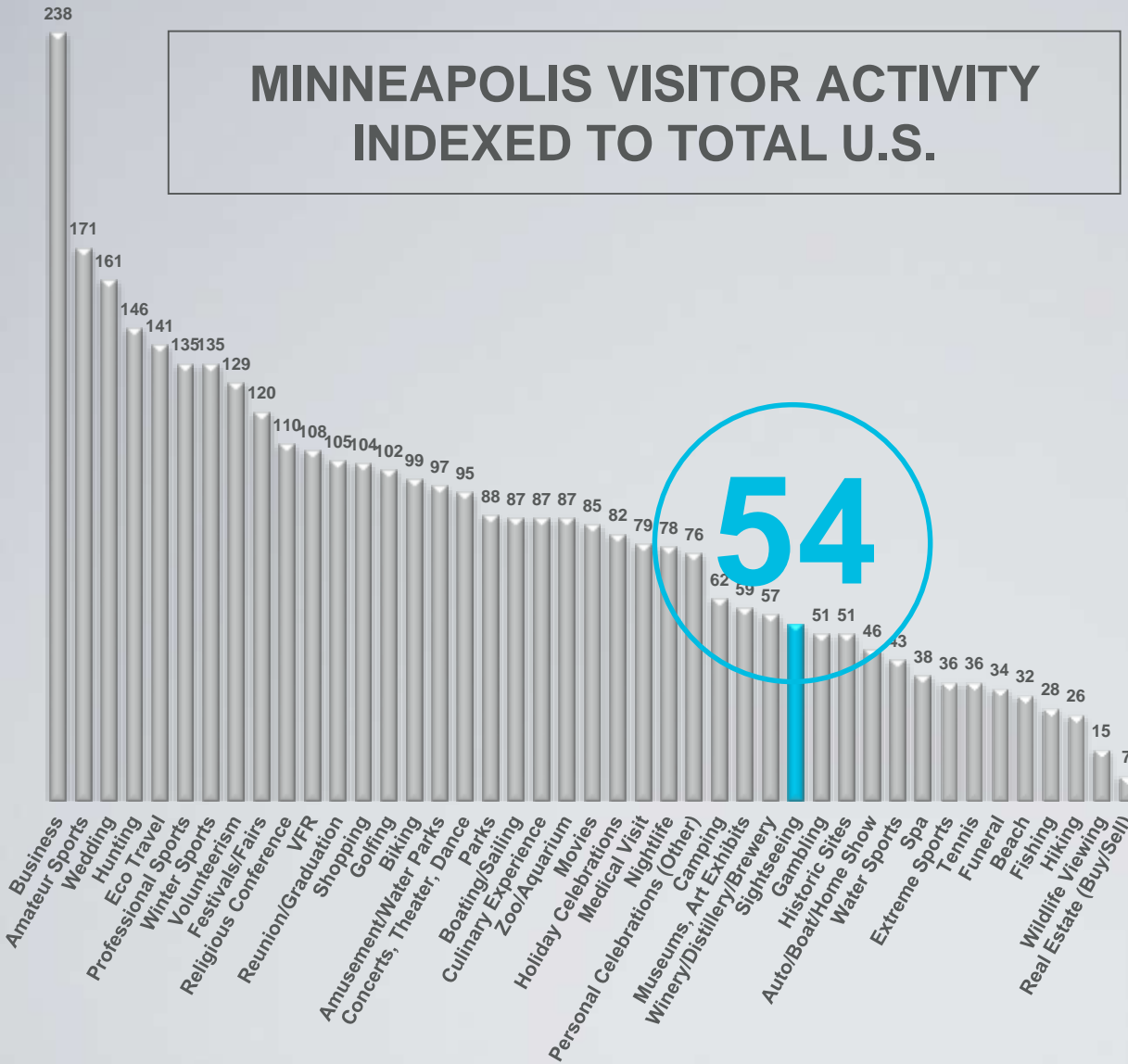
ATTRACTIONS, SPORTS & RECREATION



Minneapolis
City by Nature

Meet Minneapolis
Convention & Visitors Association





MINNEAPOLIS VISITOR ACTIVITY INDEXED TO TOTAL U.S.



MINNEAPOLIS VISITORS UNDER INDEX ON SIGHTSEEING

Source: D.K. Shifflet & Associates, Ltd. 2014
Stays Based, n = 1,512



ATTRACTIONS

Attraction	Mission	Brand	Attendance
Farmers' Markets (Hennepin, Lyndale, Midtown, Mill City)	Mill City Farmers Market inspires and nurtures a healthy community by building a local, sustainable, and organic food economy in a vibrant, educational marketplace		NA
Foshay Tower	The Foshay Tower is one of the most recognizable landmarks in the Twin Cities. Utilities magnate Wilbur Foshay built this endearing homage to the Washington Monument in 1929. At 447 feet housing 32 stories, the Foshay Tower was the tallest building in the Midwest for 48 years. Visit the museum to uncover the remarkable story behind this unique skyscraper and its eccentric creator. And view the city from the outdoor Observation Deck on the 31st floor		NA
The IDS Center	An iconic office tower. The building's distinctive stepbacks (called "zogs" by the architect) create an appearance that has since become one of Minneapolis's trademarks and the crown jewel of its skyline		50,000 per Day
Mary Tyler Moore Statue	Iconic statue of Mary Richards tossing her hat skyward in the opening credits of the 1970s sitcom, <i>The Mary Tyler Moore Show</i> , set in Minneapolis. Fans of the show can visit the statue at the Minneapolis Visitor Information Center at the corner of Nicollet and 5th Street		NA

ATTRACTIONS

Attraction	Mission	Brand	Attendance
Midtown Global Market	We exist to develop and maintain a public market that builds upon the economic, social and cultural assets within the surrounding communities and welcomes the diverse peoples of this community to share and celebrate together the healthy foods, arts, crafts and other aspects of their heritage		1.3 Million
Minneapolis Public Library (<i>Central</i>)	Tour the stunning Cesar Pelli-designed Minneapolis Central Library with a green roof, four fireplaces, an art gallery, a piano room, four-story atrium and 2.4 million items in the collection — including government documents and much more		1.0 Million
Minneapolis Sculpture Garden	The Minneapolis Sculpture Garden, a joint project of the Walker and the Minneapolis Park & Recreation Board, is one of the crown jewels of the city's park system. The 11-acre site, located across the street from the Walker building, is home to the iconic fountain-sculpture <i>Spoonbridge and Cherry</i> by Claes Oldenburg and Coosje van Bruggen.		700,000

ATTRACTIONS

Attraction	Mission	Brand	Attendance
<p>Nicollet Mall <i>(Under Renovation to be Completed in 2017)</i></p>	<p>Running through the heart of downtown Minneapolis is the shopping mecca of the city, Nicollet Mall. With stores to please all styles, Nicollet Mall offers shops like GAP, Macy's, JB Hudson's jewelry and more. Find the latest trends on both the street level and just one level up! Access stores like Banana Republic and Target via climate-controlled skyways located on the second level of downtown buildings along Nicollet Mall. Shopping this walkable 12-block stretch of stores is easy</p>		<p>750,000</p>
<p>Como-Harriet Streetcar Line</p>	<p>The Minnesota Streetcar Museum is a living history museum. A ride on one of our historic streetcars takes you back to the first half of the 1900s, the era of electric mass-transit. It's a trip back in time aboard a "museum on wheels". Our volunteer crews will provide historical context and are always happy to answer questions about the history and development of the Twin Cities streetcar system</p>		<p>40,000</p>

SPORTS



Minneapolis
City by Nature

Meet Minneapolis
Convention & Visitors Association

MINNEAPOLIS VISITOR ACTIVITY INDEXED TO TOTAL U.S.

171

102



MINNEAPOLIS VISITORS OVER-INDEX ON SPORTS ACTIVITIES (INCLUDING WINTER SPORTS)

SPORTS

Organization	Mission	Brand	Attendance
Minnesota Lynx (Target Center)	Women's National Basketball Association		158,656
Minnesota Timberwolves (Target Center)	National Basketball Association		595,652
Minnesota Twins (Target Field)	Major League Baseball		2.2 Million
Minnesota Vikings (U.S. Bank Stadium)	National Football League		1.2 Million

SPORTS

Organization	Mission	Brand	Attendance
The Loppet Foundation	Provides opportunities and creates passion for year-round outdoor activities and adventures in the Minneapolis area, especially among inner-city youth		24,791 (City of Lakes Loppet Ski Festival)
The University of Minnesota Athletics	National Collegiate Athletic Association		1.0 Million+
Twin Cities in Motion (Twin Cities Marathon)	Organizes the region's premier running events, including the Medtronic Twin Cities Marathon. With a mission of promoting healthy lifestyles through running events and community outreach, TCM contributes a portion of every race dollar to local youth and professional athletes	 	311,200 (Participants + Spectators)

RECREATION



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RECREATION

Bicycling	Minneapolis is ranked as one of the best biking cities in the country by Bike Score; it was rated the #3 biking city by <i>Bicycling Magazine</i> (2014); the #2 bicycling commuting city by the U.S. Census Bureau (2014). As of 2015, Minneapolis has 129 miles of on-street bikeways and 97 miles of off-street bikeways. The city has also been awarded with the Gold Level Bicycle Friendly Community Award from the League of American Bicyclists
Canoeing/Kayaking/Paddle Boarding	Paddleboats, canoes, and kayaks are available for rental at Lake Calhoun, Lake Harriet and Lake Nokomis
Cross-Country Skiing	20 miles of groomed cross-country ski trails vary from open sections with spectacular views of Downtown Minneapolis, to wooded trails overlooking scenic lakes. The Wirth Winter Recreation Area offers 15 miles of trails groomed for both classical style and skate skiing. The cross-country ski trails connect to five additional miles of groomed Chain of Lakes trails, allowing you to ski from Golden Valley to Uptown! Rentals are available at Wirth Par 3, Hiawatha and Columbia clubhouses
Fishing	Minneapolis has abundant opportunity for shore fishing: Lakes Calhoun, Cedar, Harriet, Hiawatha, Isles, Nokomis, Loring, Powderhorn, Ryan and Theodore Wirth, as well as the Mississippi River. Many of the pier and shore locations offer kid-friendly fishing opportunities. Minneapolis lakes offer the same great fishing in the winter months as they do in the warm seasons. All Minneapolis boat launches make great access points to drop gear close to the water's edge
Golfing	Visit and enjoy seven beautiful golf courses and three driving ranges: Championship (<i>Columbia, Gross National, Theodore Wirth, Hiawatha, Meadowbrook</i>); Executive (<i>Fort Snelling</i>); Par 3 (<i>Theodore Worth</i>)
Ice Skating	47 outdoor ice rinks at 22 parks, citywide. Many of them offer separate spaces for general skating and recreational uses such as hockey, broomball and pond hockey. All outdoor ice rink locations have a warming room and offer free loaner skates. The Depot Rink is an historic downtown Minneapolis train shed that now houses a modern-day, indoor skating rink with floor-to-ceiling glass walls providing a great view of the city skyline.



RECREATION

Snowboarding	The city's first snowboarding area is also the region's least expensive. Wirth Winter Recreation Area offers exceptional value, recreational expertise and a deep snow base of fun. The park offers everything from lessons by veteran-trained staff for beginners, to a snowboard park with advanced technical rails and jumps. What sets us apart from other hills in the area is our commitment to teaching the sport. Our snowboard instructors take that teaching commitment seriously and are well known for their love to ride and living on the hill - giving tips and tricks to any rider that shows an interest
Snowshoeing	Snowshoeing is an easy-to-learn activity for all ages, and a great way to exercise while exploring the winter beauty of Minneapolis parks. Explore the snow-covered wooded trails of Theodore Wirth Park, join a naturalist-led trek, or set off on an adventure of your own. If you're snowshoeing on your own, the Wirth Off-Road Cycling area at the Wirth Winter Recreation Area has some of the best trails in town We offer naturalist-led snowshoeing and natural history programs for all ages. Snowshoe rentals are available at the Wirth Chalet, Columbia Golf Clubhouse and Hiawatha Golf Clubhouse
Snow Tubing/Sledding	Sunset Hill is the designated sledding hill nearest to Wirth Park. It is located just a half-mile North of the Wirth Winter Recreation Area in Valley View Park. Admission is free, bring your own sled, snow tube or toboggan. The designated sledding hill at Columbia Golf Club is one of the steepest hills in Northeast Minneapolis. Bring your own sled, or rent a snow tube
Swimming	Twelve public beaches are located on Lakes Calhoun, Cedar, Harriet, Hiawatha, Nokomis and Wirth. Additionally, there are two public water parks, two swimming pools and 62 wading pools located throughout the city.

BRANDING



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City by Nature

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BRANDING



Minneapolis
City by Nature

BRANDING

Positioning Statement:

Minneapolis is the perfect blend of natural beauty and urban sophistication.

No other American city has a chain of lakes, the mighty Mississippi, and 200 miles of walking, biking and cross country ski trails within the city limits – literally steps from the most vibrant arts and music scene outside NYC, the best shopping in the region, and museums among the finest in the nation. From ski hills to shopping malls. Muskie to Monet. Biking to Beef Bourguignon. **Minneapolis is the American city where natural and urban drama share a single stage.**



POSITIONING INITIATIVE



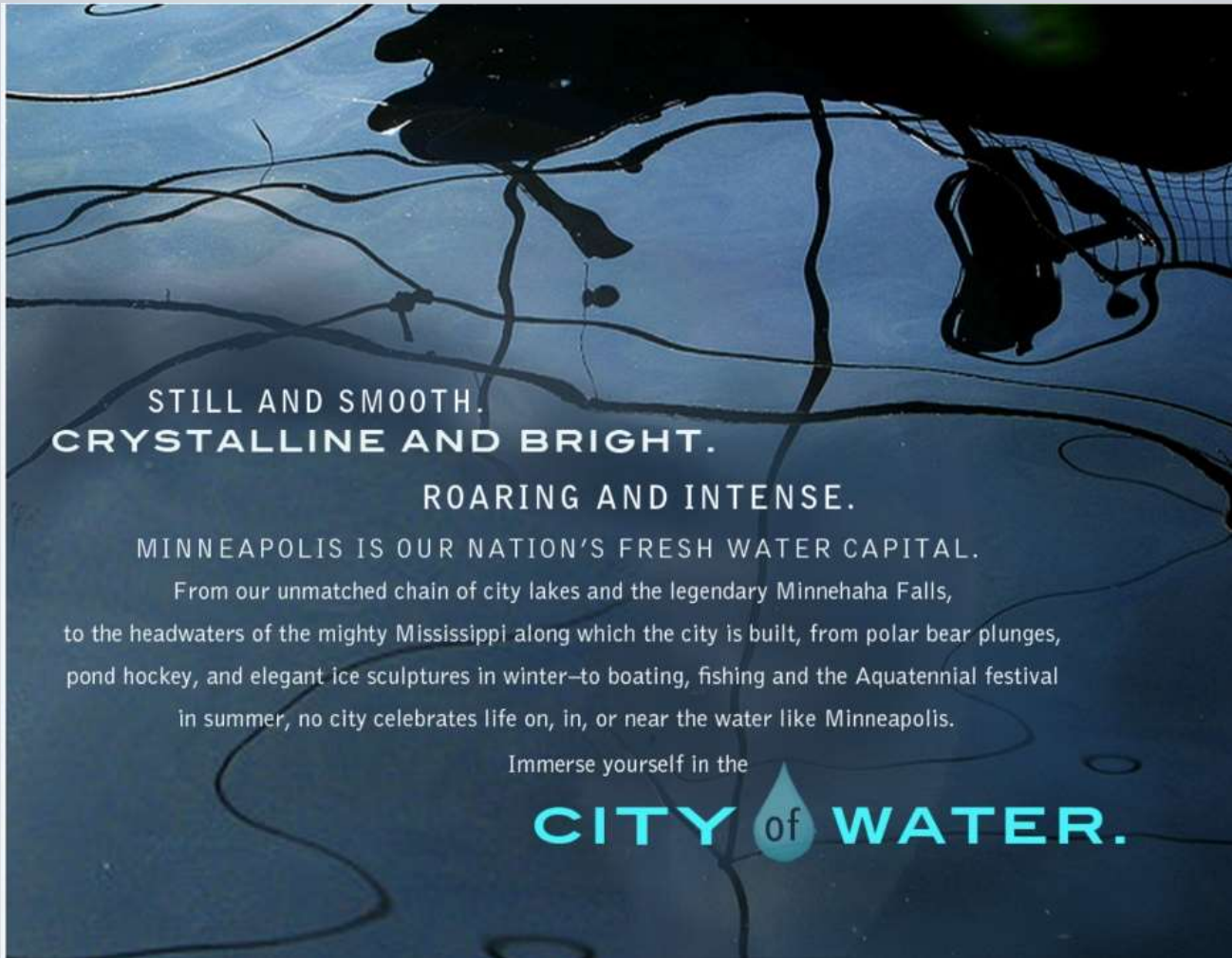
POSITIONING DEVELOPMENT



RESEARCH

- Online survey conducted by *Synovate* from July 20th through July 26th, 2011
- Nationally representative samples
 - Leisure travelers (n = 255)
 - Convention attendees (n = 254)
 - Meeting planners (n = 248)
- Key measures
 - *Preference and why*
 - *Likelihood to visit*

RESEARCH STIMULUS



STILL AND SMOOTH.
CRYSTALLINE AND BRIGHT.

ROARING AND INTENSE.

MINNEAPOLIS IS OUR NATION'S FRESH WATER CAPITAL.

From our unmatched chain of city lakes and the legendary Minnehaha Falls, to the headwaters of the mighty Mississippi along which the city is built, from polar bear plunges, pond hockey, and elegant ice sculptures in winter—to boating, fishing and the Aquatennial festival in summer, no city celebrates life on, in, or near the water like Minneapolis.

Immerse yourself in the

CITY of **WATER.**

RESEARCH STIMULUS

Metropolitan by Nature

Minneapolis is the perfect blend of natural beauty and urban sophistication. No other American city has a chain of lakes, the mighty Mississippi, and 200 miles of walking, biking and cross country ski trails within the city limits — literally steps from the most vibrant arts and music scene outside NYC, the best shopping in the region, and museums among the finest in the nation. From ski hills to shopping malls. Muskie to Monet. Biking to Beef Bourguignon. Minneapolis is the American city where natural and urban drama share a single stage.



RESEARCH STIMULUS

LIVE!
FROM MINNEAPOLIS



Live theater, live sports, live music and shopping to die for. It all comes to life in Minneapolis. All things considered, you simply can't find an American city with more accessible restaurants, arts venues, clubs, museums, festivals and sports. Got a couple of hours? You're in the biking capital of the nation. Experience the Mall of America. Explore the country's largest sculpture garden. Not to mention, more golf courses and theater per capita than just about anywhere. Why sit on the sidelines?

Come to life in Minneapolis!

RESEARCH STIMULUS

Creative Crossroads



Come be inspired with us.

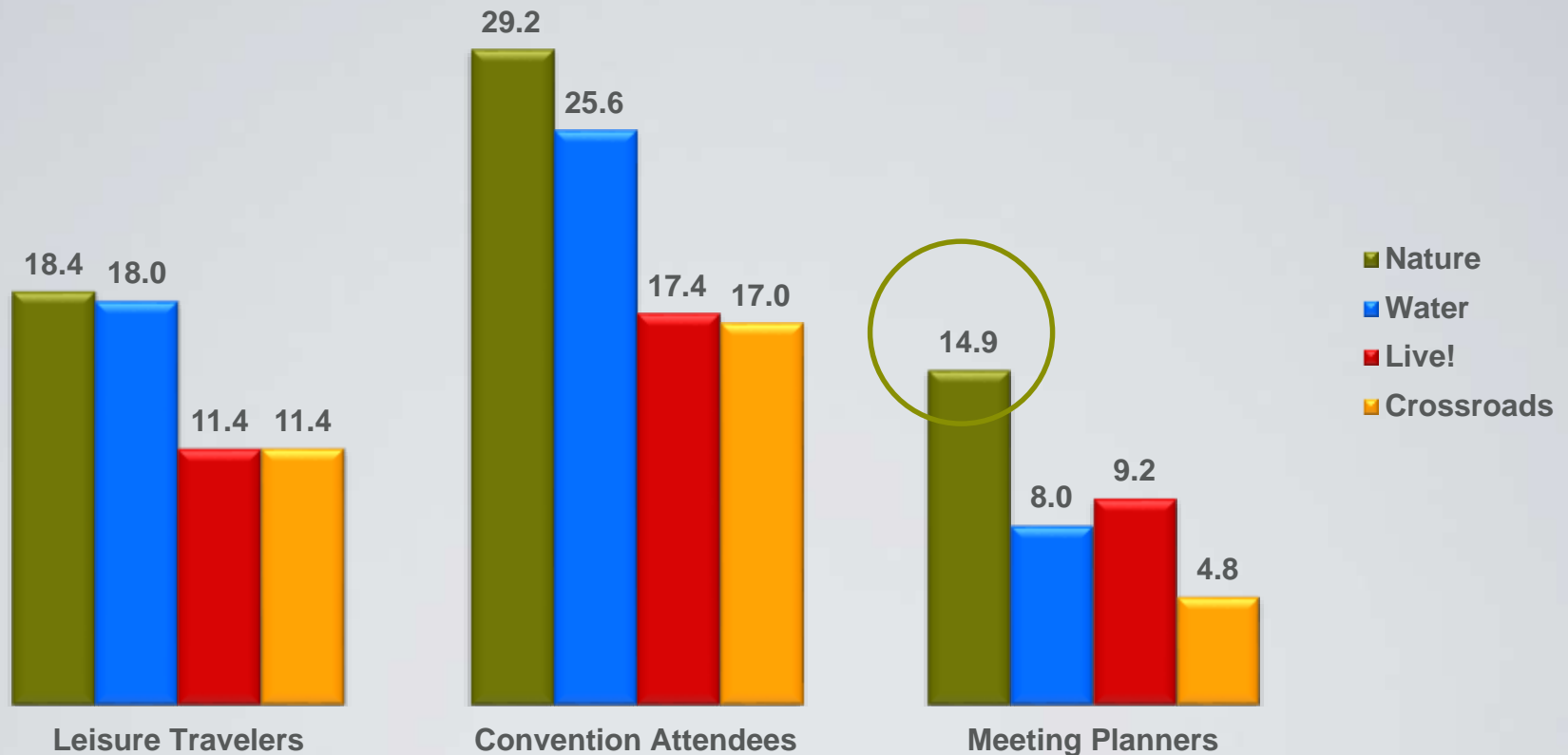
Minneapolis is home to a thriving, progressive community of the most creative minds in the U.S. Visitors find inspiration in our world-class arts organizations, visionary green spaces and innovative skyway system, sculpture gardens, funky ethnic neighborhoods, architectural masterpieces, the finest museums around, and the most mega, megamall in America. (After all, we invented indoor malls here.)

Mix in award-winning local chefs, galleries galore, and more live theatre and music per capita than any city outside NYC. It's no wonder we keep our collective creative juices flowing . . . come be inspired with us.

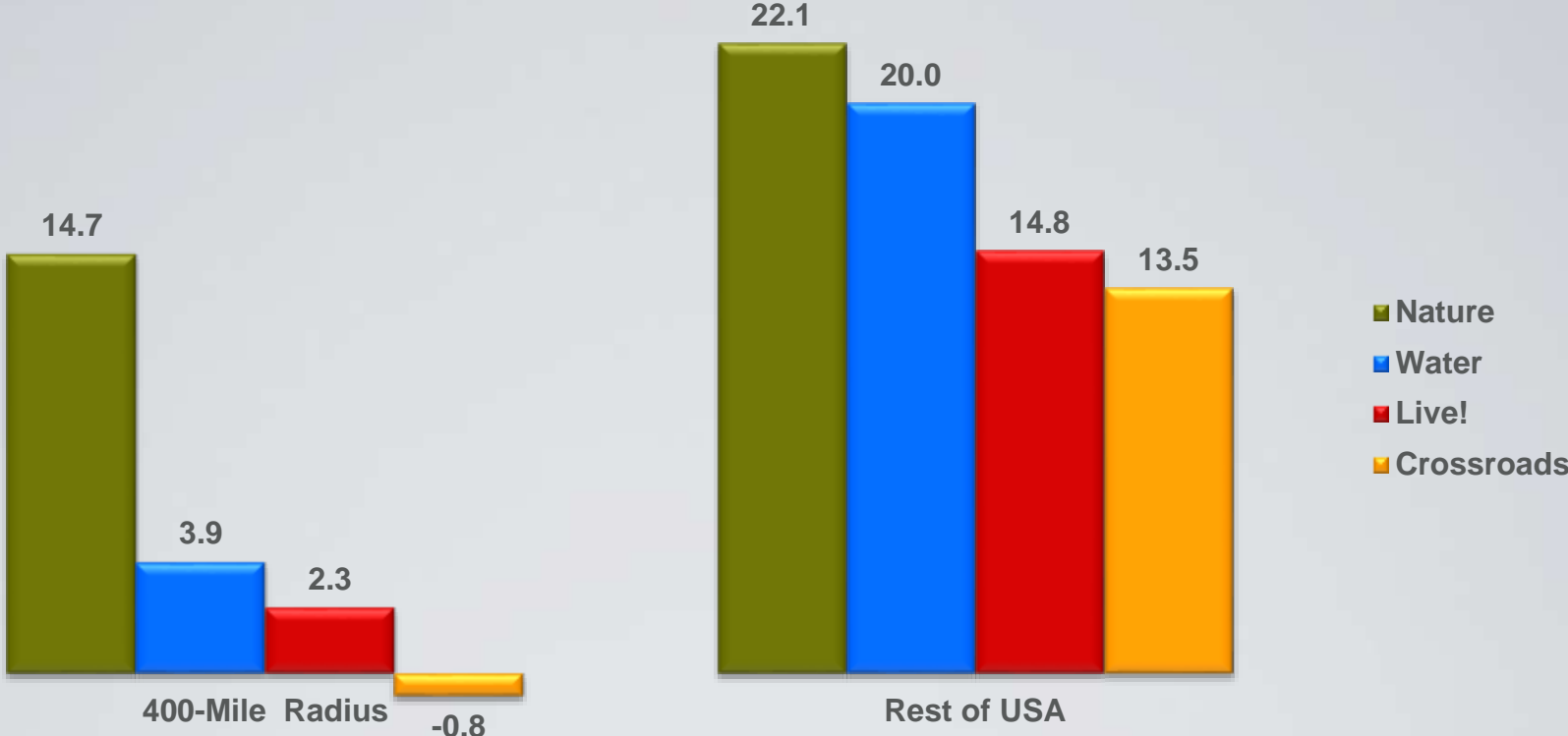
NATURE AND WATER ARE SIGNIFICANTLY MORE PREFERRED THAN LIVE! AND CROSSROADS



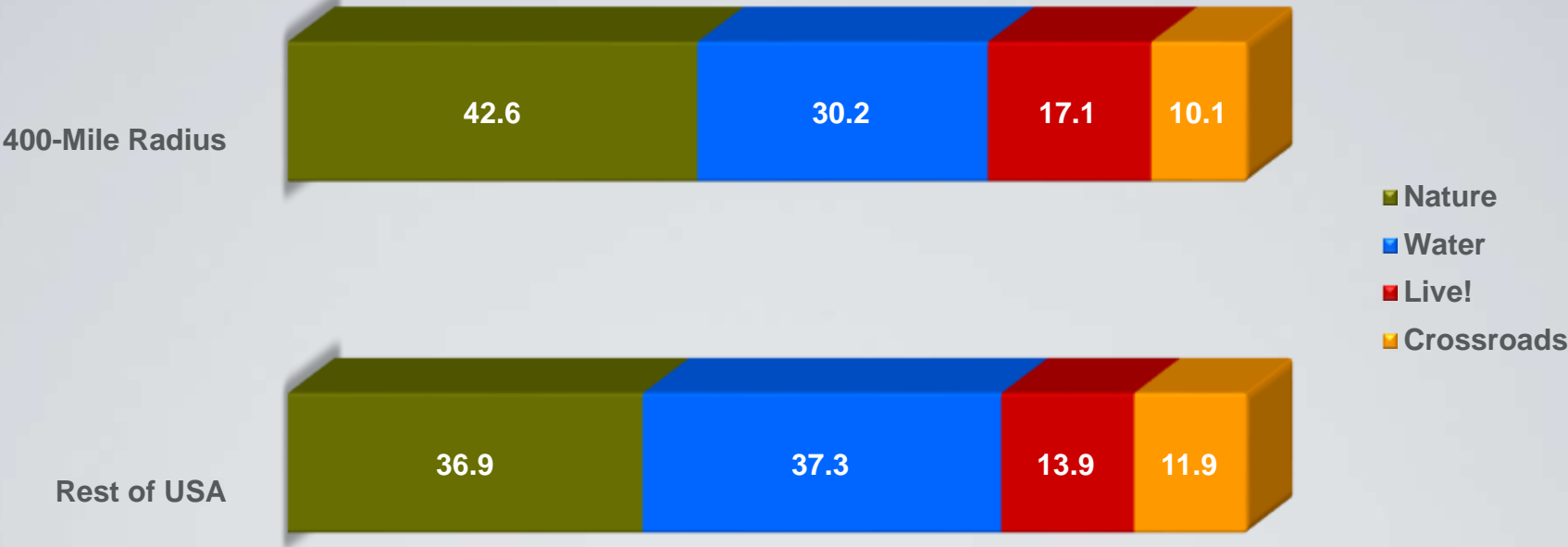
NATURE AND WATER ALSO GENERATE SIGNIFICANTLY GREATER VISIT INTENT THAN DO *LIVE!* AND *CROSSROADS*



HOWEVER, WITHIN A 400-MILE RADIUS, *NATURE* GENERATES SIGNIFICANTLY GREATER VISIT INTENT THAN DOES *WATER*



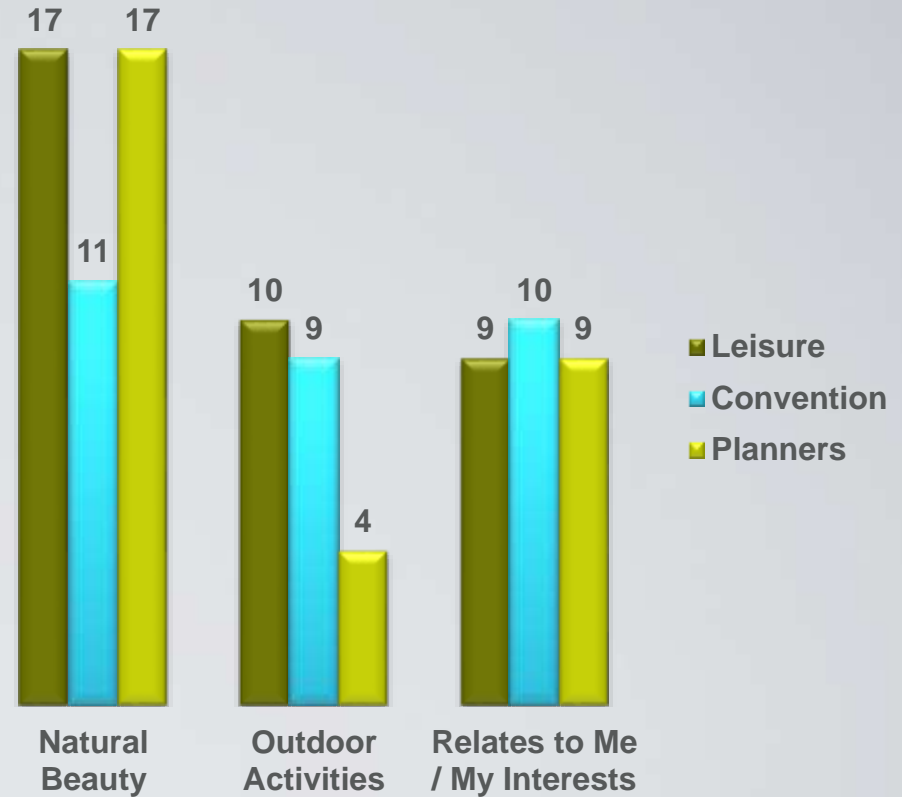
AND, *NATURE* IS SIGNIFICANTLY MORE PREFERRED THAN *WATER* WITHIN A 400-MILE RADIUS



NATURE IS PREFERRED BECAUSE OF ITS NATURAL BEAUTY, OUTDOOR ACTIVITIES AND PERSONAL CONNECTION TO THE VISITOR

Metropolitan by Nature

Minneapolis is the perfect blend of natural beauty and urban sophistication. No other American city has a chain of lakes, the mighty Mississippi, and 200 miles of walking, biking and cross country ski trails within the city limits — literally steps from the most vibrant arts and music scene outside NYC, the best shopping in the region, and museums among the finest in the nation. From ski hills to shopping malls. Muskie to Monet. Biking to Beef Bourguignon. Minneapolis is the American city where natural and urban drama share a single stage.



RECOMMENDATION

- Implement *Metropolitan by Nature* as the positioning of Minneapolis.
- Rationale:
 - *Strong preference and visit intent (key measures)*
 - *Significantly stronger within a 400-mile radius*
 - *Connects with visitors' interests*
 - *Multi-dimensional thus yielding rich opportunities for execution*
 - *"Activities" will be directly related to the Meet Minneapolis partners*

EVENTS



Minneapolis
City by Nature

Meet Minneapolis
Convention & Visitors Association

EVENTS BY MONTH



EVENTS

Month	Event	
February	City of Lakes Loppet Ski Festival	The City of Lakes Loppet is a three-day urban cross country ski festival for the whole family. Competitive and non-competitive events: cross country skiing, snowshoeing, speed skating, fat tire biking, beer garden, snow sculpture and fireworks.
April	Minneapolis St. Paul International Film Festival	One of North America's largest and longest-running film festivals. In April 2015, Minnesota's premier film event featured 303 new films from 72 countries with an attendance of over 41,000. The Festival annually attracts more than 250 filmmakers and industry guests to the Twin Cities providing opportunities for them to engage with audiences and colleagues at parties, events, panel discussions and screenings.
May	Heart of the Beast Theater May Day Parade	Every spring, the May Day Parade explodes onto Bloomington Avenue! We tell our story, musically and visually, as a walking theatrical performance. Tens of thousands line the streets, enjoying the spectacle and each other. The May Day Ceremony follows the parade in Powderhorn Park and has become a joyous annual ritual for nearly 50,000 people in the Twin Cities. 200-300 committed participants of all ages enact a pageant. This story is told with children and adult dancers, puppeteers, a live orchestra and four giant serene puppets who represent the Prairie, Sky, River, and Woods. It culminates in the Tree of Life Ceremony: to the steady beating of drums, a resplendent red Sun Flotilla paddles the Sun from across the lake to the shore where the Tree of Life sleeps, waiting to be reawakened. The May Day Festival follows the Parade and Ceremony and features music, dancing, poetry, foods, canoe rides, and more in Powderhorn Park.
	Art-A-Whirl	Presented by the Northeast Minneapolis Arts Association (NEMAA), Art-A-Whirl is an open studio tour in Northeast Minneapolis. It's a great opportunity to tour private artist studios and galleries, connect with the artists, and purchase original artwork. Over the last 20 years, it has become the largest open studio tour in the country

EVENTS

Month	Event	
June	Northern Spark	Northern Lights.mn announces a full year of artists addressing global climate change: Northern Spark 2016, June 11, through Northern Spark 2017, June 10. These two incredible nights of art focused on Earth's changing environment will be connected by a year of interactive projects, events and workshops exploring climate challenges and solutions in sites across the Twin Cities
	Stone Arch Bridge Festival	The Stone Arch Bridge Festival is a free art festival now in its 22nd year. The City of Minneapolis recorded attendance of 100,000 at the 2015 festival. It is the 3rd largest festival in Minneapolis. The event will feature over 250 quality visual artists
	Rock the Garden	With the Mississippi riverfront and Minneapolis skyline as a backdrop, Rock the Garden 2016 will be in a new location—Boom Island Park—while construction is underway for the expanded Walker campus. Featuring two stages, eight bands, and the best Twin Cities food and beer
	Juneteenth	The Juneteenth Minnesota Festival observes the June 19th 1865 proclamation of the abolition of slavery in Texas. This celebrates the freedom for people of all racial backgrounds
	Twin Cities Pride Festival	Twin Cities Pride brings the greater GLBT community together to commemorate its diverse heritage, foster inclusion, educate and create awareness of issues, and celebrate achievements in equality. Held in Loring Park
	Midsommar	A family-friendly day full of music, dancing, and much more! Join in traditional Swedish <i>Midsommarstång</i> (Midsummer-pole) raising, singing and dancing. Highlights include live music from ASI's performing clubs, <i>slöjd</i> (handcraft) demonstrations, flower head-wreath making, face painting, storytelling, outdoor games and music-based nature play activities

EVENTS

Month	Event	
July	Basilica Block Party	The Basilica Block Party music festival began in 1995 as a fundraiser to help pay for the structural restoration of The Basilica of Saint Mary. Today, proceeds from the event benefit The Basilica Landmark, which preserves, restores, and advances the historic Basilica of Saint Mary. In addition, a portion of all proceeds from The Basilica Block Party go to The Basilica's St. Vincent de Paul outreach program, which provides services to those in need.
	Aquatennial	The Best Days of Summer! The Aquatennial is the official civic celebration of the City of Minneapolis, held during the third week of July. Originating in 1940, the Minneapolis Aquatennial celebrates the city's famous lakes, rivers, and streams and includes a parade, tennis invitational, 5-K run and the final Target Fireworks. The fireworks display is one of the largest in the country, and larger than the city's Fourth of July celebration.
August	Fringe Festival	A performing arts festival held during the first two weeks in August. The eleven-day event, which features performing artists of many genres and disciplines, is one of many Fringe Festivals in North America. Minnesota Fringe is the largest nonjuried festival in the United States and the third-largest Fringe festival in North America. In 2013 it featured 176 shows with a total of 895 performances in multiple venues around the city and distributed 50,007 tickets over the eleven-day event.
	Uptown Art Fair	This annual event is held in the heart of Uptown. Choose from a variety of limited editions and one-of-a-kind treasures from artists including sculptures, paintings, photographs, woodcarvings, glasswork, jewelry, multimedia compositions and more. Other features: food and drink from vendors; outdoor wine and beer gardens; Culinary Arts Competition; non-stop entertainment on the performance stage; youth art fair; family activity area

EVENTS

Month	Event	
August	Loring Art Fair	The Loring Park Art Festival is a juried festival, two day event in Loring Park near downtown Minneapolis. The Festival consists of 140 visual artists displaying their original work in 12x12 booths, strolling musicians, scheduled stage performances, children's activities and food booths. The art work presented will be from a variety of media including painting, photography, printmaking, handmade paper, wood, jewelry, clay, sculpture, fiber, mixed media and glass.
	Powderhorn Art Fair	Powderhorn Art Fair, one of the finest juried regional art fairs in the country, celebrates artistic expression and community engagement. Set in a pastoral, 66-acre city park, Powderhorn Art Fair features 184 regional and national artists of varied disciplines.
	Lake Hiawatha Neighborhood Festival	The 21st Annual Lake Hiawatha Neighborhood Festival. Kids enjoy pony rides for under 10 years old, face painting, hair painting, games, caricatures, inflatable water slide and a moonwalk. We will also have the family fitness challenge and talent contest. You can also take part in the raffle and medallion hunt.
	Polish Festival	The Twin Cities Polish Festival will immerse Minnesotans and visitors in " <i>all things Polish</i> ", presenting a kaleidoscope of unique cultural and educational displays, food and top-notch entertainment. Bring a blanket, take a seat on the lawn along the Old Main Street in Minneapolis, visit with friends, watch outstanding musical and dance entertainment, enjoy traditional foods and beverages, and just simply have fun!

EVENTS

Month	Event	
September	Monach Festival	The Festival celebrates the monarch butterflies' amazing 2300 mile migration from Minnesota to Mexico with music, food, dance, hands-on art, native plant sales, and plenty of opportunities to get up close with monarch butterflies, learn about their habitats, and what you can do to make a difference
	Minneapolis Bike Tour	The 11 th annual Minneapolis Bike Tour starts and ends at beautiful Boom Island and features three fully supported routes, 16 miles, 25 miles, and 32 miles, that take riders through the spectacular park and byway system of Minneapolis at their own pace, traffic free!
October	Twin Cities Marathon	The Twin Cities Marathon (TCM) is an annual marathon in the Minneapolis-Saint Paul area. The race is often dubbed "The Most Beautiful Urban Marathon in America". The TCM was first run in 1982, and typically takes place during the first weekend in October. It is one of the top 10 largest marathons in the US. In 2006 the race agreed to its first corporate sponsorship, with Medtronic Inc. The official name of the marathon changed to Medtronic Twin Cities Marathon (MTCM). In addition to the marathon, the MTCM has expanded to a full weekend of events providing opportunities for runners and wheelers of all ages and abilities.
December	Holidazzle	As downtown Minneapolis' premier holiday celebration, Holidazzle has delighted residents, visitors and downtown employees for years. In 2015, this tradition brought family-friendly programming to Loring Park and was free and open to the public. Holidazzle is all about the people, places and products that make our local scene so special—and that includes the sensational foods, beverages, crafts and merchandise scene.

MINNEAPOLIS VISITOR ACTIVITY INDEXED TO TOTAL U.S.

VISITORS OVER-INDEX ON FESTIVALS AND FAIRS



Source: D.K. Shifflet & Associates, Ltd. 2014
Stays Based, n = 1,512

MARKETING & PROMOTION



Minneapolis
City by Nature

Meet Minneapolis
Convention & Visitors Association

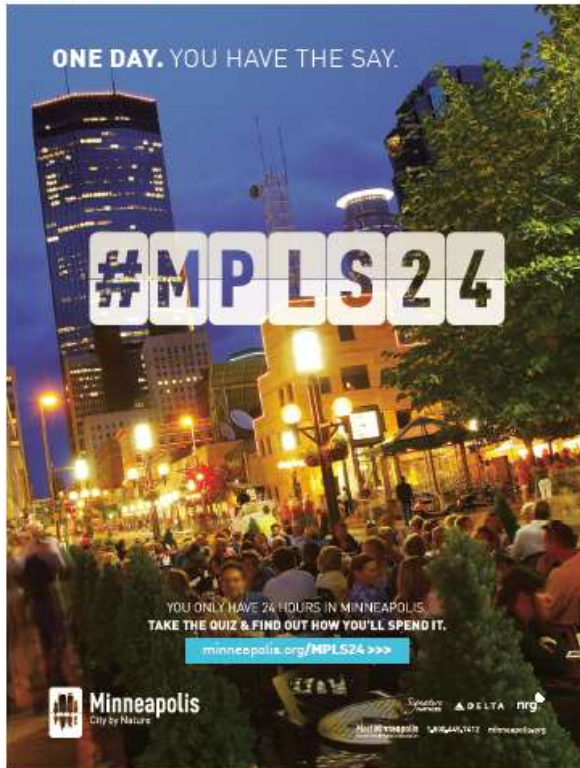
MARKETING & PROMOTION

TO MEETING PLANNERS

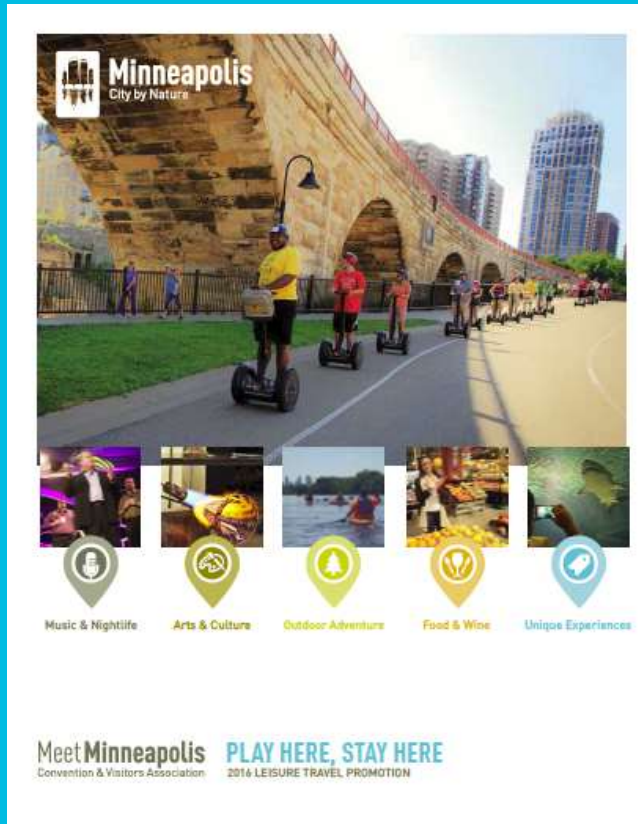
- Objectives
 - Increase awareness of Minneapolis
 - Drive overnight hotel stays
 - Drive business to partner venues
 - Increase activity on Meet Minneapolis website
 - Increase spending in Minneapolis hospitality venues

- Promotion Strategy Elements
 - Keyword targeted advertising buys – search engine marketing
 - Retargeted ad placement
 - E-marketing newsletters
 - Tradeshows and professional associations
 - Print Media
 - Social Media
 - Public Relations
 - “Why Minneapolis? in 24 Hours” familiarization program

PRINT CAMPAIGN



MARKETING & PROMOTION



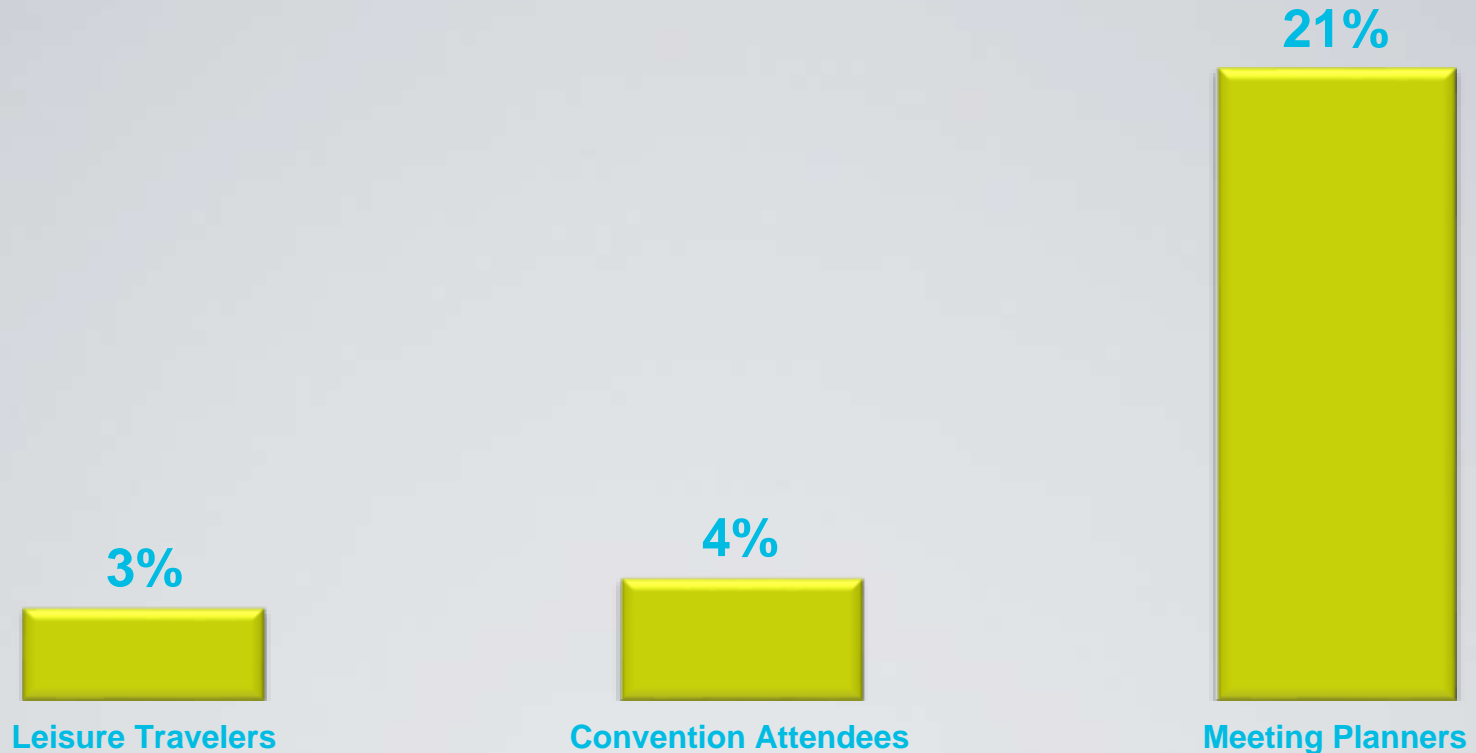
TO LEISURE TRAVELERS

- Objectives
 - Drive overnight hotel stays
 - Drive business to Minneapolis restaurants, retailers and hospitality establishments
 - Increase awareness of Minneapolis
 - Increase activity on Meet Minneapolis website

- Target Audience
 - Public relations focus on 2 to 3 hour drive range
 - Media buy will extend to a 400-mile radius
 - Top feeder markets: New York, Chicago and Winnipeg

- Promotion Strategy Elements
 - Keyword targeted advertising buys – search engine marketing
 - Retargeted ad placement
 - E-marketing newsletters
 - Social Media
 - Sweepstakes

UNAIDED AWARENESS OF MINNEAPOLIS SEPTEMBER 2012



Q16: "When you think of **American cities to visit**, which **ONE** comes to mind first?"
Q17: "Still thinking about American cities to visit, **what other cities** come to mind?"
Q27: "When you think of **American cities for holding meetings**, which **ONE** comes to mind first?"
Q28: "Still thinking about American cities for holding meetings, **what other cities** come to mind?"

Source: Meet Minneapolis Awareness Tracking Study, September 2012

UNAIDED AWARENESS OF OTHER CITIES SEPTEMBER 2012

City	Leisure Travelers	Convention Attendees	Meeting Planners
New York City	50%	61%	28%
Las Vegas	42%	37%	13%
Orlando	34%	23%	40%
Chicago	23%	38%	61%
Washington, D.C.	16%	19%	38%
New Orleans	13%	12%	24%
St. Louis	7%	7%	14%
Denver	6%	12%	33%
Dallas	5%	13%	24%
Minneapolis	3%	4%	21%
Kansas City	2%	3%	12%
Indianapolis	1%	1%	11%
Milwaukee	1%	*	6%

Q16: "When you think of **American cities to visit, which ONE comes to mind first?**"
 Q17: "Still thinking about American cities to visit, **what other cities come to mind?**"
 Q27: "When you think of **American cities for holding meetings, which ONE comes to mind first?**"
 Q28: "Still thinking about American cities for holding meetings, **what other cities come to mind?**"

Source: Meet Minneapolis Awareness Tracking Study, September 2012

ATTRIBUTES OF MINNEAPOLIS (TOP TWO BOXES) SEPTEMBER 2012

	LEISURE TRAVELERS	CONVENTION ATTENDEES	MEETING PLANNERS
Friendly	72%	82%	85%
Down To Earth	70%	75%	72%
Many Lakes Within the City	65%	74%	67%
Clean	63%	72%	76%
Beautiful	57%	76%	66%
Safe	55%	73%	68%
Cultural	55%	63%	44%
Good Shopping	54%	72%	70%
Fun	50%	66%	53%
Active Year Round	50%	60%	45%
Lots To Do	49%	64%	59%
Creative / Artistic	48%	57%	46%
Easy To Get Around	45%	64%	58%
Natural / "Green"	43%	61%	60%
Vibrant	40%	58%	41%
Unique	38%	59%	36%
Innovative	35%	53%	36%
Sophisticated	30%	52%	29%
Fast Paced	28%	48%	24%
Cold Year Round	26%	41%	25%
Hip	23%	42%	33%

Source: Meet Minneapolis Awareness Tracking Study, September 2012



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Q25 / 36: "Please indicate how strongly you agree or disagree with each of the following statements: The city of Minneapolis is / has . . . " ("Agree Strongly, Agree Somewhat, Neither Agree Nor Disagree, Disagree Somewhat, Disagree Strongly")

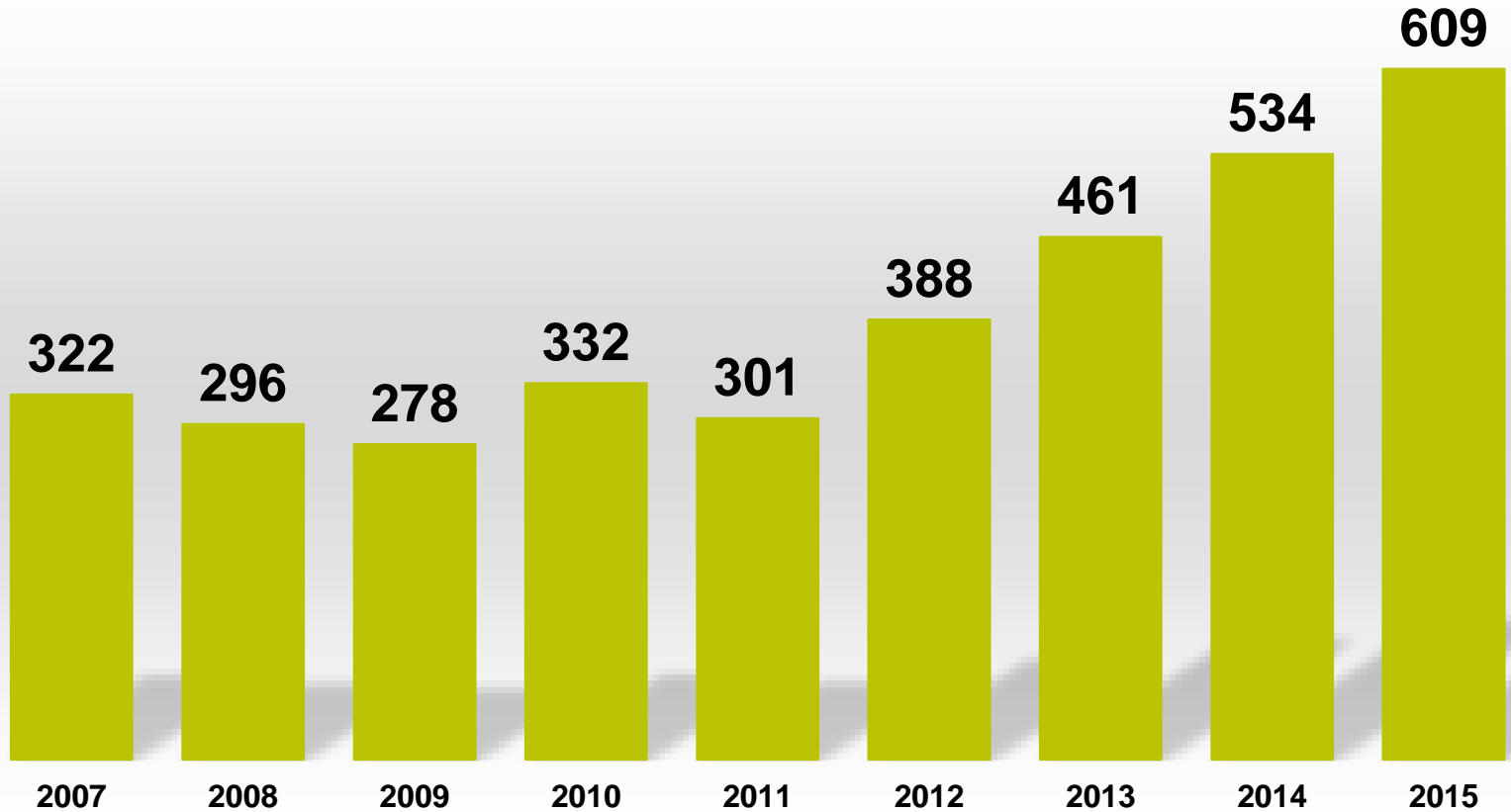
MEETINGS & CONVENTIONS



Minneapolis
City by Nature

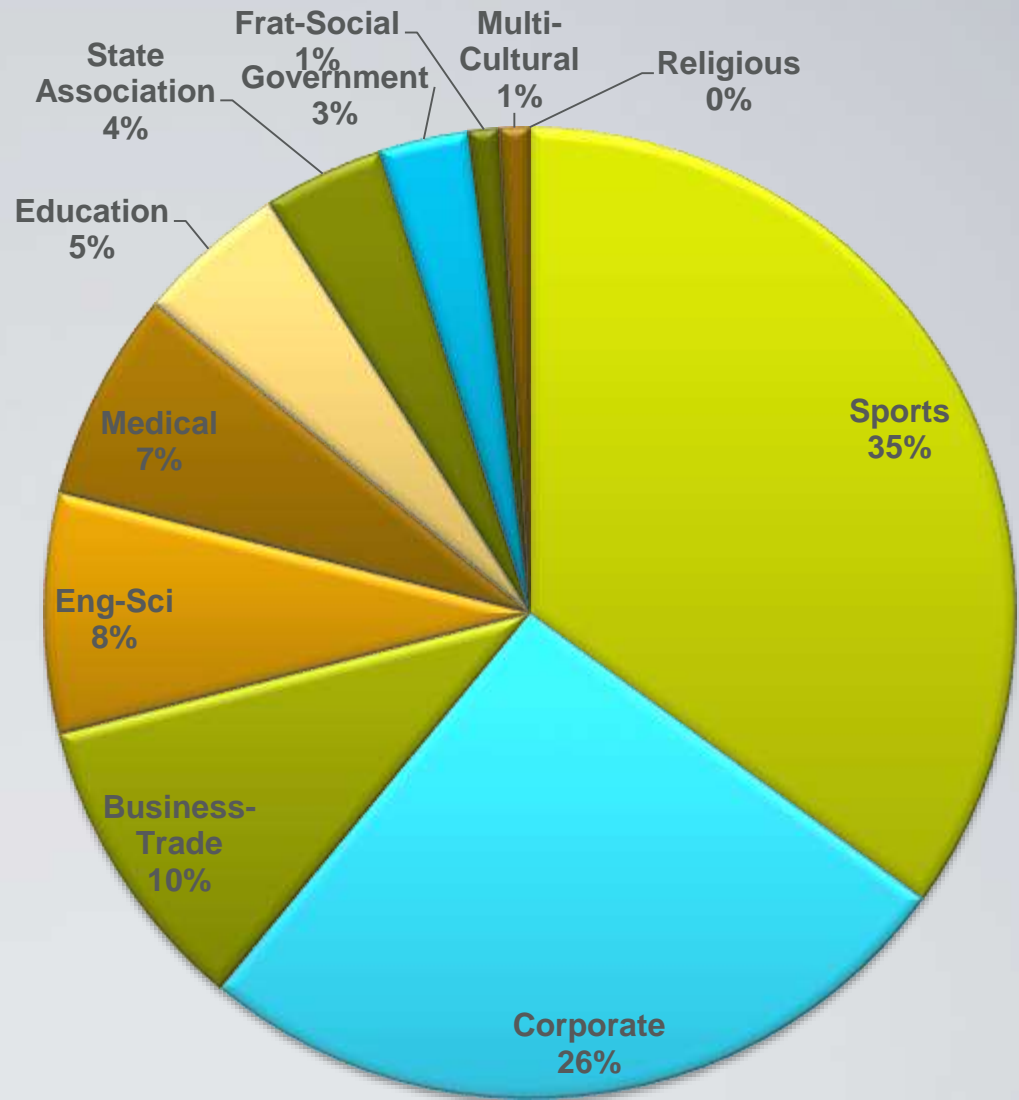
Meet Minneapolis
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MEET MINNEAPOLIS MEETINGS & CONVENTIONS

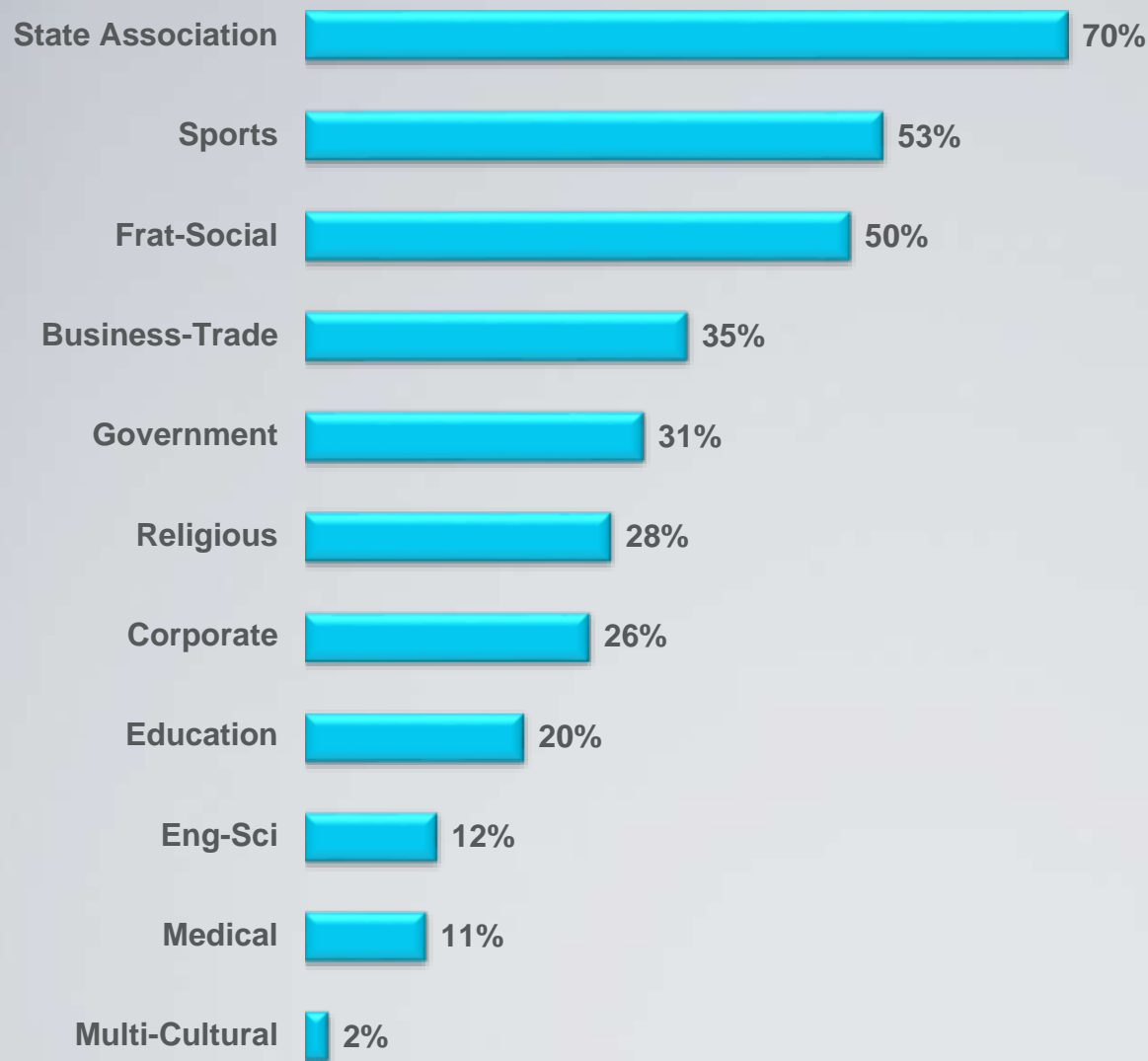


Source: iDSS

2014 MEETINGS BOOKED ROOM NIGHTS BY SEGMENT

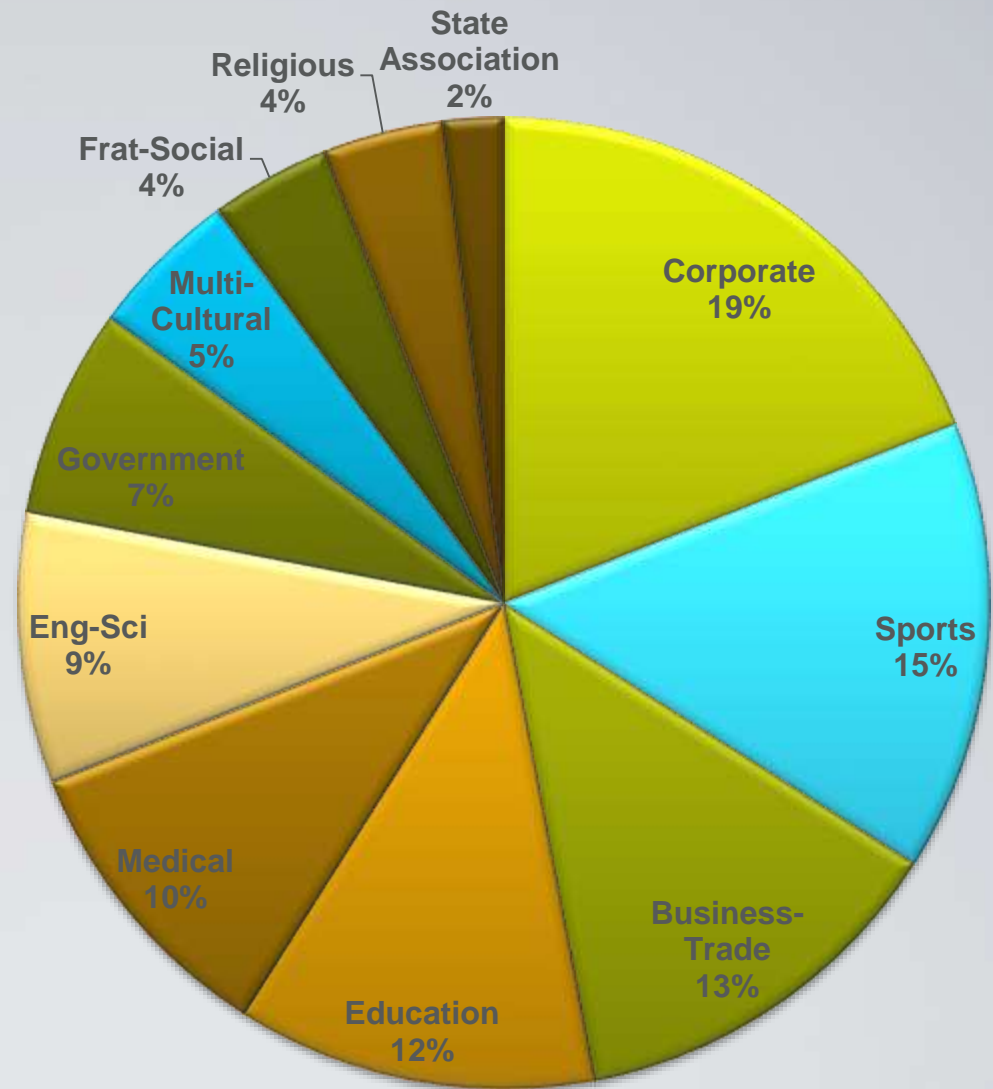


2014 CONVERSION BY SEGMENT

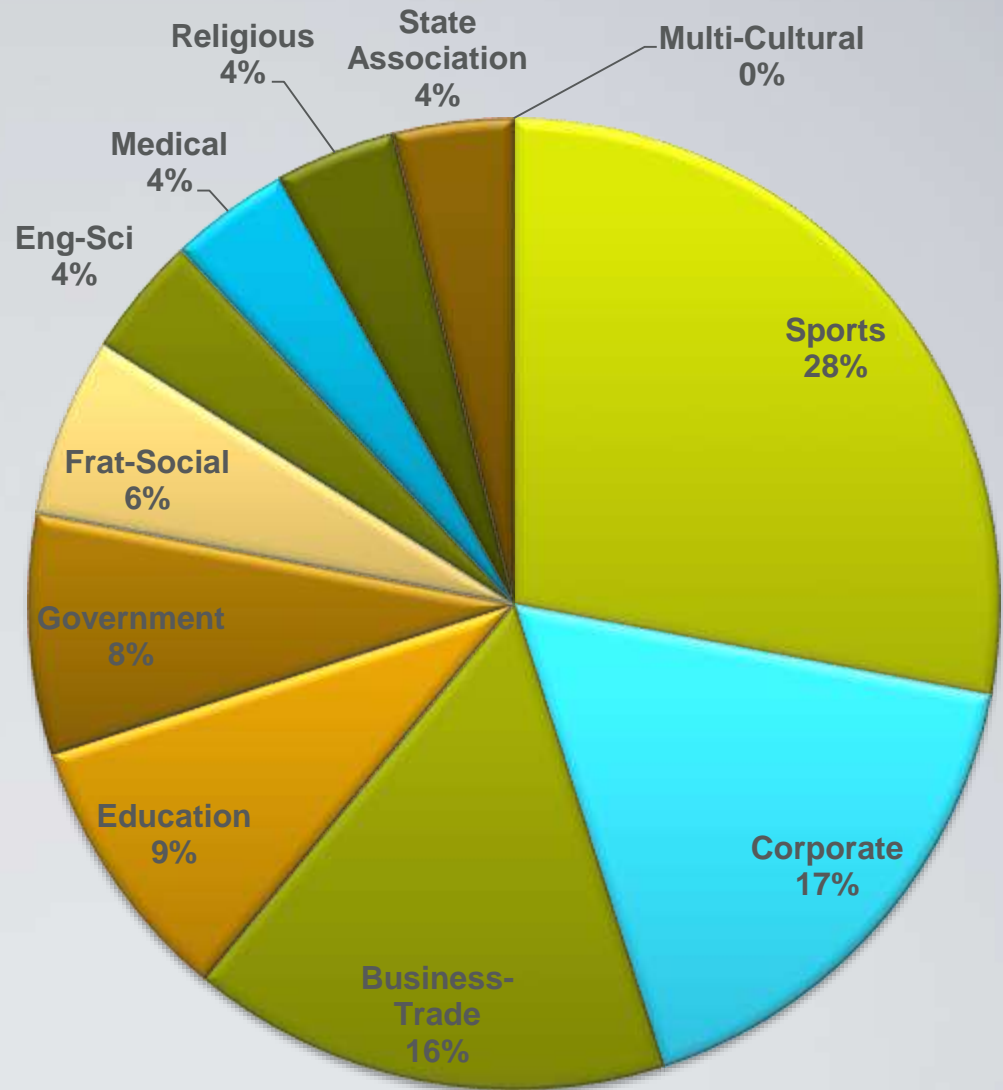


Source: Trends Analysis Projections (TAP) Market Segment Analysis

2014 MEETINGS DEMAND ROOM NIGHTS BY SEGMENT



2014 MEETINGS CONSUMED ROOM NIGHTS BY SEGMENT



MINNEAPOLIS CONVENTION CENTER

- The Minneapolis Convention Center (MCC) opened in 1990 on the southern edge of downtown Minneapolis one block east of the Nicollet Mall. It has convenient access to hotels, retailers, entertainment and restaurants. All are connected by the skyway system.
- Mission: *We will be the best Convention Center by providing an exceptional facility, outstanding internal and external customer service, and responsible use of our resources.*
- Vision: *To be the best Convention Center, envied for our staff, client, partnerships, and community impact.*
- The largest convention center in the Upper Midwest, the MCC has achieved Level One certification to the ASTM Standard pertaining to the Evaluation and Selection of Venues for Environmentally Sustainable Meetings, Events, Trade Shows and Conferences.
- The MCC is home to a 3,400 fixed-seat auditorium, 475,000 square feet of exhibit space, 87 meeting rooms and both a 28,000-square-foot ballroom and a 55,000-square-foot ballroom.
- The Center is owned and operated by the City of Minneapolis.
- It operated at 57% occupancy in 2015 and welcome 900,000 visitors.



NATURAL RESOURCES



Minneapolis
City by Nature

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MINNEAPOLIS VISITOR ACTIVITY INDEXED TO TOTAL U.S.

VISITORS UNDERUTILIZE THE CITY PARKS

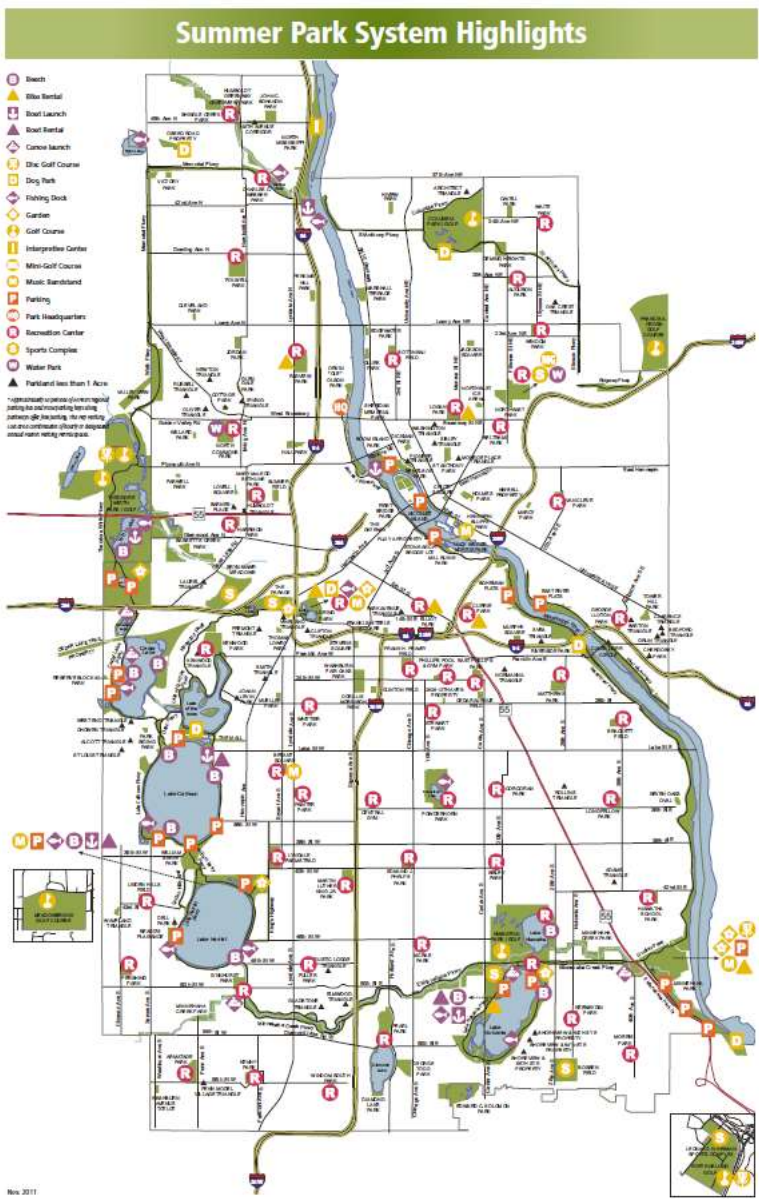


Source: D.K. Shifflet & Associates, Ltd. 2014
Stays Based, n = 1,512

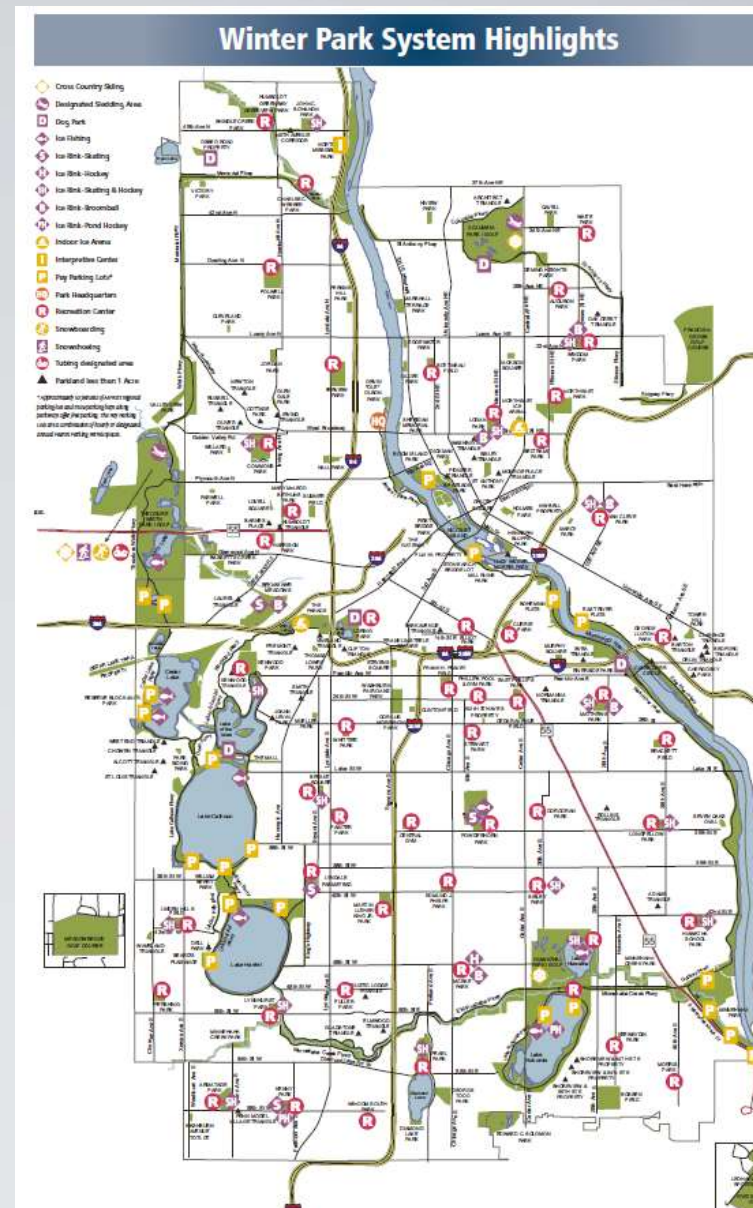
NATURAL RESOURCES

Chain of Lakes	The most popular destination in the Minneapolis park system and a district of the Grand Rounds National Scenic Byway. Shorelines of Brownie Lake, Cedar Lake, Lake of the Isles, Lake Calhoun, and Lake Harriet, including the trails connecting them and Lyndale Park.
City Parks	The Minneapolis Park System is a premier destination that welcomes and captivates residents and visitors. The Park System and its beauty are part of daily life and shape the character of Minneapolis. Natural, cultural, artistic, historical, and recreational resources cultivate outstanding experiences, health, enjoyment, fun, and learning for all people. The Park System is sustainable, well-maintained and safe, and meets the needs of individuals, families, and communities. The focus on preserving land continues, with a strong emphasis on connecting people to the land and each other. There are 135 parks in the System.
Grand Rounds National Scenic Byway	The Grand Rounds National Scenic Byway is part of the Federal Highway Administration's National Scenic Byways Program, which recognizes and supports outstanding roads. The Grand Rounds is one of the country's longest continuous systems of public urban parkways and has been the preeminent urban parkway system for more than a century. The Grand Rounds encompasses natural features, including lakes, creeks, woodlands, riverbanks, and wetlands, as well as constructed features, like canals, lagoons, greenways and parks, playgrounds, parkways, trails, golf courses, athletic fields, picnic grounds, gardens, and bridges. Originally conceived by Horace W. S. Cleveland and other visionaries in the early days of the Minneapolis Park System, the Grand Rounds is a unique example of a connected park system created for the benefit of the citizens and visitors of Minneapolis. The Grand Rounds has been nominated for inclusion on the Natural Register of Historic Places.
Minnehaha Falls	One of Minneapolis' oldest and most popular parks features a majestic 53-foot waterfall, limestone bluffs, and river overlooks, attracting more than 850,000 visitors annually
Mississippi River	RiverFirst is a 20-year vision for Mississippi riverfront parks that builds on our community's rich river heritage and passion for parks, nature and wildlife to create places on "America's fourth coast" where neighborhoods and businesses can grow and people from near and far can experience one of the four great rivers of the world through world-class recreational and cultural activities. In 2012, the Minneapolis Park and Recreation Board and its RiverFirst partners initiated design and planning for five priority projects along 5.5 miles of the Upper Riverfront in Minneapolis
St. Anthony Falls	Saint Anthony Falls or the Falls of Saint Anthony, located northeast of downtown, were the only natural major waterfall on the Upper Mississippi River. They are the birthplace of the former city of St. Anthony and to Minneapolis when the two cities joined in 1872 to fully use its economic power for milling operations. From 1880 to about 1930, Minneapolis was the "Flour Milling Capital of the World". Today, the falls are defined by the locks and dams of the Upper Saint Anthony Falls and the Lower Saint Anthony Falls. The area around the falls is designated the St. Anthony Falls Historic District and features a 1.8-mile self-guided walking trail with signs explaining the area's past

NATURAL RESOURCES



NATURAL RESOURCES



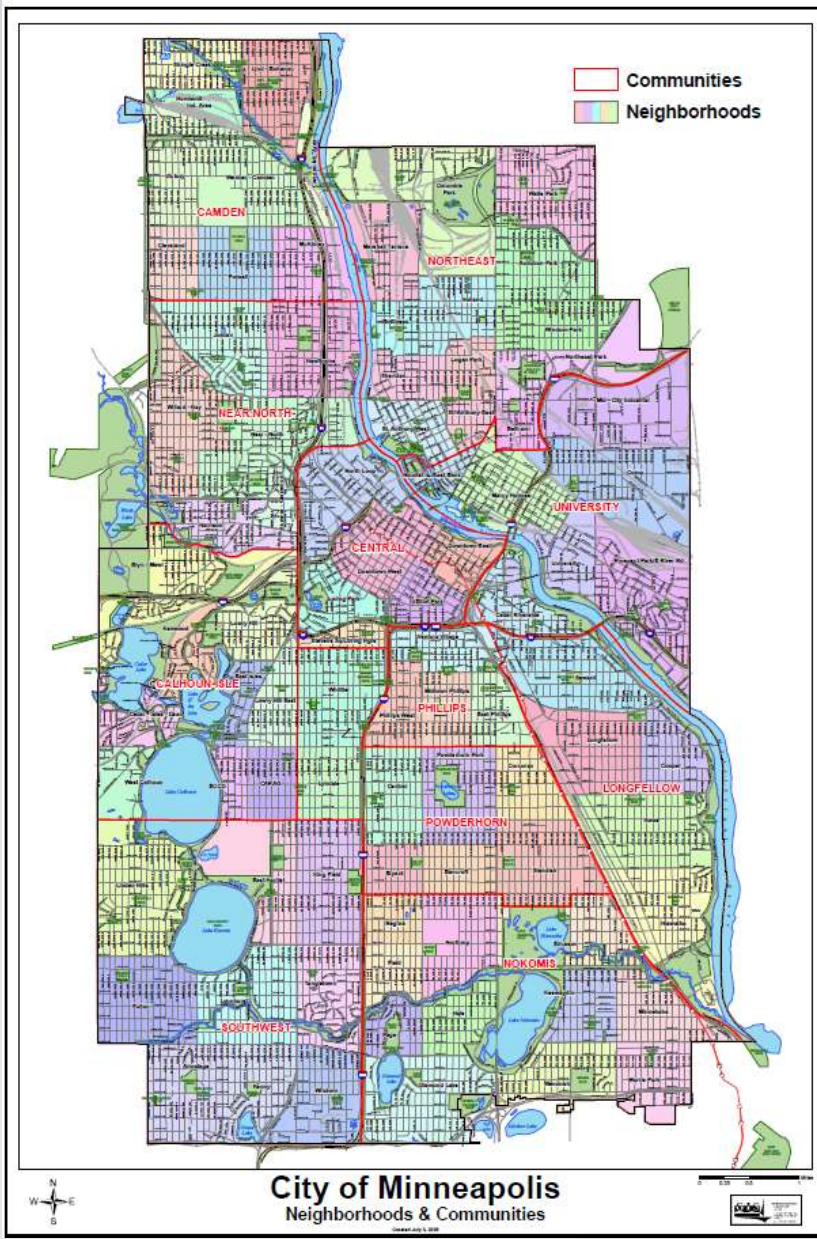
NEIGHBORHOODS



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NEIGHBORHOODS



NEIGHBORHOODS

UPTOWN

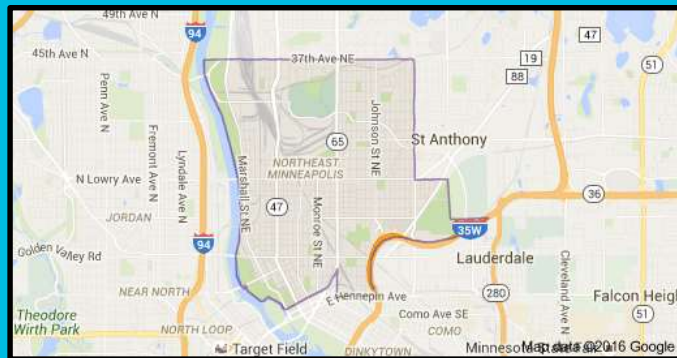
- Uptown is an eclectic, vibrant, business, entertainment, and constantly changing area. Restaurants, large and small, thrive in Uptown, along with movie theaters, professional offices, retail stores, coffee shops and more than 30,000 residents.
- Uptown has proven to be a popular destination for those seeking retail, nightlife, and cultural events, and the district was famously written about by recording artist Prince.



NEIGHBORHOODS

NORDEAST

- This business district, which is the oldest settlement in the city, lies across the Mississippi River from Downtown Minneapolis. Northeast is sometimes referred to as "Nordeast", reflecting the history of northern and eastern European immigrants and their language influence.
- Blending a heritage of old architecture, classic housing, bustling commercial streets, and industrial work centers, along with new residential high-rises, suburban cul-de-sacs, big-box retail, and a popular art scene, Northeast offers diverse amenities as part bedroom neighborhood and job center for the city of Minneapolis.
- The prominent features of Northeast include ornate Eastern European influenced churches and massive grain silos and mills. Mostly built around the late 19th to early 20th century, these structures shadow the landscape of modest Victorians and four story apartments.
- In the past decades, Northeast has developed an artist community. Galleries and studios now occupy many historic industrial buildings including the Northrup King. Other buildings with large numbers of art and design related tenants include the Grain Belt Brewery complex, the California Building, Thorp Building, the 2010 Artblok, and the Casket Arts Building.



HISTORIC DISTRICTS

➤ Dinkytown

- *Turn of the 20th century streetcar hub.*
- *Due to its proximity to the University of Minnesota it is characterized by student culture and has reflected intellectual and artistic inquiry, as well as dissent and protests.*

➤ Fifth Street Southeast

- *Homes in popular 19th century architectural styles: Italianate Revival, Greek revival and Richardsonian Romanesque.*

➤ Golden Valley Road

- *Ornate apartment buildings from 1927 – 1929 in the Spanish Colonial Revival and Tudor Revival styles.*

➤ Harmon Place

- Heart of the Minneapolis automotive district for over 50 years: “*Automobile Row*”.
- 1907 – 1930 buildings that exemplify automotive showroom design with display windows.

HISTORIC DISTRICTS

➤ Healy Block

- 1886 -1898 Queen Anne style homes.

➤ Lowry Hill East

- Turn of the 20th century residences in the Colonial Revival, Queen Anne, Arts & Crafts and Prairie styles of architecture.

➤ Milwaukee Avenue

- 19th century homes in the style of the “common man’s architecture”.
- The earliest “planned workers’ community.”

➤ Warehouse District

- Commercial buildings in the architectural styles of Italianate, Queen Anne, Richardsonian Romanesque and Classical Revival.

HISTORIC DISTRICTS

➤ Minnehaha

- *Features Minnehaha Creek with its falls and glen.*
- *Minnehaha Princess Station: an ornate Victorian train depot built in 1870.*
- *John H. Stevens house: Greek Revival built in 1849 and regarded by some as the birthplace of Minneapolis.*
- *The Longfellow House (1906): two-story Georgian built as a replica of the Henry Wadsworth Longfellow House in Cambridge, Massachusetts.*

➤ Ninth Street South

- *One of the city's best and most cohesive collection of multiple-family dwellings from the turn of the 20th century.*
- *Townhouses, row houses and flats in the Classical, Renaissance and Romanesque styles.*

HISTORIC DISTRICTS

➤ St. Anthony Falls

- *The falls of St. Anthony is the only major waterfall on the Mississippi River*
- *Historic lumber and flour milling district includes homes, commercial buildings, significant bridges and elegant churches.*
 - *The Pillsbury A Mill: built in 1881 and at the time was the largest mill in the world.*
 - *Ard Godfrey House is a Classic Revival cottage built in 1848.*
 - *Our Lady of Lourdes Church (1858).*
 - *Stonewall Bridge built of granite and limestone in 1883 is the only bridge of its kind over the Mississippi River.*

➤ Stevens Square

- *Apartment buildings and single-family houses constructed during the 1910's and 1920's.*



HISTORIC DISTRICTS

- **University of Minnesota Greek Letter Chapter Houses**
 - “Fraternity/Sorority Row”
 - *Twenty-two houses were built during the first three decades of the 20th century in the Beaux Arts, Classical and Period Revival styles.*

- **Washburn – Fair Oaks**
 - *Significant concentration of residences built at the turn of the 20th century: Georgian, Medieval and Renaissance Revival.*
 - *The Minneapolis Institute of Arts built in 1912 is the area’s major landmark (Beaux Arts style).*

- **Victory Memorial Drive**
 - *A landscaped boulevard commemorating the fallen soldiers of World War One.*
 - *It is the largest war memorial in Minneapolis-St. Paul at 3.8 miles.*

RESTAURANTS, NIGHTLIFE & RETAIL



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MINNEAPOLIS VISITOR ACTIVITY INDEXED TO TOTAL U.S.



VISITORS UNDER INDEX ON CULINARY EXPERIENCE, NIGHTLIFE AND BREWERIES

NUMBER OF RESTAURANTS AND BARS IN MINNEAPOLIS

Restaurants w/o Alcohol¹

939

Restaurants w/Alcohol

646

Food Trucks

99

Tap Rooms

22

Cocktail Rooms

3

RESTAURANTS

- *“ . . . America’s next great food city . . . We were floored by how Minneapolis was inspiring excitement about Midwestern food the way Nashville was Southern food.”*
 - Matt Lee and Ted Lee, *Saveur*, June 5, 2015
- *“The Twin Cities bested the likes of Nashville and New Orleans to be named Best Local Food Scene in the U.S. by the readers of USA Today and travel website 10Best . . . St. Paul and Minneapolis are ‘boiling over with new restaurants and award-winning chefs.’”*
 - Nick Woltman, *pioneerpress.com*, August 22, 2015
- *“We tend to think of New York City, San Francisco, even New Orleans when it comes to dining destinations. But the Twin Cities . . . are becoming hot spots for culinary creativity right this moment. The area is crawling with talent and it seems you can’t throw a rock here without finding a James Beard Award winner.”*
 - Anne Roderique-Jones, *USA TODAY*, July 20, 2015



RESTAURANTS

- *“Minneapolis Is a Paradise of Somali Food . . . [Abdirahman] Kahin [owner of Afro Deli] estimates that there are over 60 Somali restaurants in Minnesota, with 90 percent of them located in Minneapolis.”*

➤ Yasin Mohamud, *munchies.vice.com*, November 29, 2015

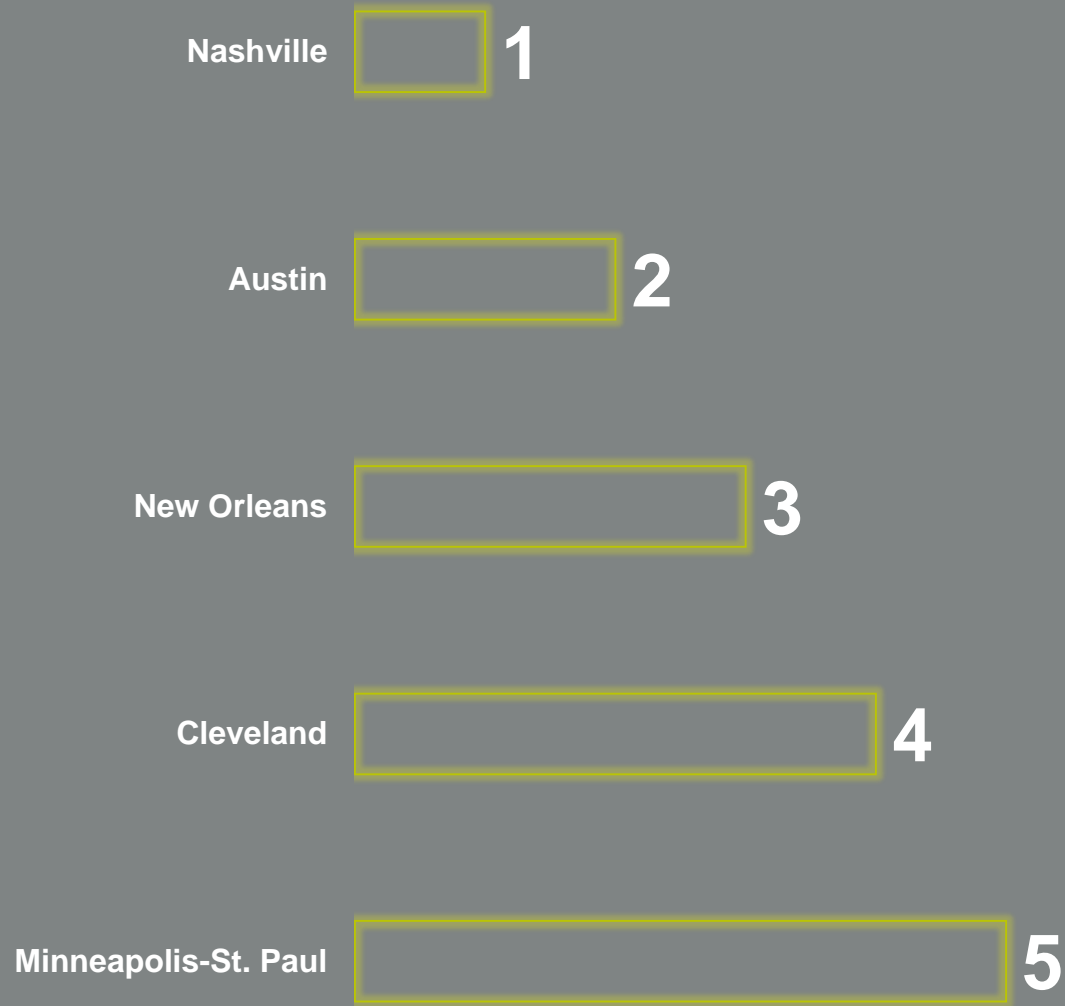
- Food trucks first rolled onto the streets of Minneapolis in 2010.

- *“A food truck is basically a roving restaurant, so personally I look for some of the things I do when dining out anywhere. Is it clean? Is the staff friendly and engaging? Have they bothered to include clever or interesting marketing and branding? Are the menu items unique? Are they using local or at least premium ingredients?”*

➤ Tom Crann, MPR News, June 24, 2015



MINNEAPOLIS RANKED FIFTH BEST MUSIC SCENE IN US



MINNEAPOLIS VISITOR ACTIVITY INDEXED TO TOTAL U.S.

VISITORS ARE AVERAGE IN THEIR PROPENSITY TO SHOP



SHOPPING

- *“The city is home to the 4.87 million-square-foot Mall of America. A destination unto itself, the country's biggest mall could fit seven Yankee stadiums inside it. The shopping center boasts more than 520 stores, making it a shopaholic's dream.”*
 - U.S. News & World Report Travel, Best Shopping Destinations in the USA
- ▶ *“After a surge of housing has risen in downtown Minneapolis, retail is rebounding too . . . 1,600 apartments coming online in downtown Minneapolis in the past two years, with 2,500 condos and apartments slated to be built over the next several years . . . ‘Retail follows the rooftops. Times are good . . . This year is pegged for 800,000 square feet of new retail development. It's making the market more exciting and Minneapolis more sought after.’“*
 - ▶ Lindsey Seavert, KARE, quoting Matt Hazelton, Marcus & Millchap Retail Associate Director, June 12 ,2015



TRANSPORTATION & WAYFINDING



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TRANSPORTATION & WAYFINDING

THE GRAND ROUNDS



Airport

Minneapolis-Saint Paul International Airport (MSP) has two terminals: Terminal 1 and Terminal 2, with most flights arriving at the former. Delta Air Lines maintains a hub at MSP and dominates the airport. Thirteen other airlines are also served by MSP: Air Canada, Air France, Alaska Airlines, American Airlines, Condor, Frontier Airlines, Great Lakes Airlines, Icelandair, Southwest Airlines, Spirit Airlines, Sun Country Airlines, United Airlines and US Airways. The airlines provide non-stop service to 114 cities in the United States and 20 international destinations. MSP is the 16th busiest airport in the nation managing 1,130 take-offs and landings, and 95,000 passengers, everyday. Travel + Leisure named MSP the “*Best Airport in the United States*” in 2012.

Biking Paths

As of 2015, Minneapolis has 129 miles of on-street bikeways and 97 miles of off-street bikeways. The current Minneapolis Bicycle Master Plan was adopted by the City Council in 2011 to establish goals, objectives, and benchmarks that improve safety and mobility for bicyclists and increase the number of trips taken by bicycle. The 2011 Bicycle Master Plan addresses a broad range of bikeway facility types, including off-street trails, bike boulevards, bike lanes, and shared lanes. The City of Minneapolis also approved a Climate Action Plan in 2013 recommending implementation of 30 miles of on-street protected bike facilities by 2020. A variety of maps show the web of on and off-road routes that span the greater metropolitan area. During the winter, major bike trails such as the Midtown Greenway are plowed at the same time as major streets.

Bus

Greyhound and Jefferson Lines buses arrive at the Hawthorne Transportation Center, located at 950 Hawthorne Avenue in downtown Minneapolis. It's just a few minute's taxi ride away from most of the downtown hotels. It's 4-5 blocks away from a few major bus routes and the light rail

Grand Rounds

The Grand Rounds National Scenic Byway is part of the Federal Highway Administration's National Scenic Byways Program, which recognizes and supports outstanding roads. The Grand Rounds is one of the country's longest continuous systems of public urban parkways and has been the preeminent urban parkway system for more than a century. It encompasses natural features, including lakes, creeks, woodlands, riverbanks, and wetlands, as well as constructed features, like canals, lagoons, greenways and parks, playgrounds, parkways, trails, golf courses, athletic fields, picnic grounds, gardens, and bridges. Originally conceived by Horace W. S. Cleveland and other visionaries in the early days of the Minneapolis Park System, the Grand Rounds is a unique example of a connected park system created for the benefit of the citizens and visitors of Minneapolis. The Grand Rounds has been nominated for inclusion on the National Register of Historic Places.



TRANSPORTATION & WAYFINDING

Nice Ride Map

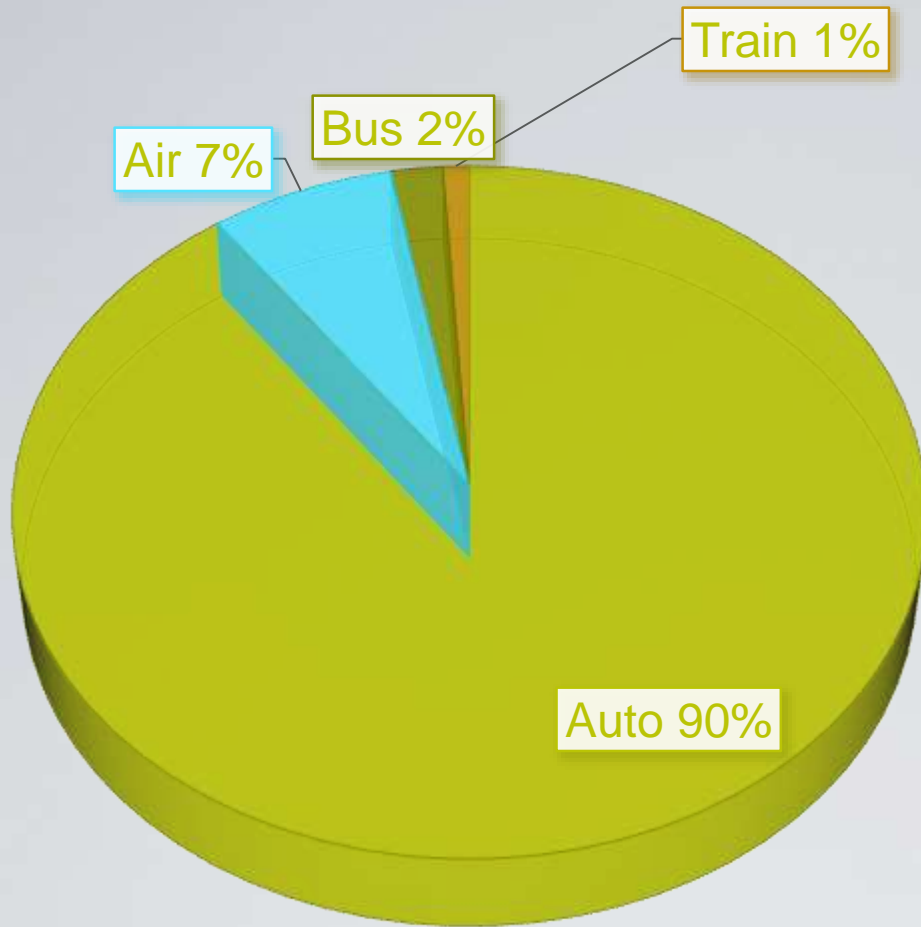


<p>Metro Transit</p>	<p>Metro Transit is the transportation resource for the Twin Cities, offering an integrated network of buses, light rail and commuter trains as well as resources for those who carpool, vanpool, walk or bike. It added a light-rail link between downtown Minneapolis and downtown St. Paul (Green Line) in mid-2014 and is developing enhanced transit ways throughout the region. The Blue Line connects downtown Minneapolis to the airport and Mall of America. In 2014 there were 84.5 million bus rides on 905 buses across 132 routes.</p>
<p>Nice Ride</p>	<p>One of the country's largest urban bike rental programs opened in the summer of 2010. Nice Ride Minnesota two-wheelers are available for rent at 150 locations in both Minneapolis and Saint Paul. Its mission is to enhance quality of life by providing convenient, easy to use bike sharing and fleet programs that will provide residents and visitors a healthy, fun, different way to get around town.</p>
<p>Parking</p>	<p>Minneapolis Municipal Parking System has 17 parking ramps and 7 lots. The City of Minneapolis operates approximately 7000 metered spaces located throughout the city. There are approximately 140 parking lots in downtown Minneapolis.</p>
<p>Skyways</p>	<p>The Minneapolis Skyway System is an interlinked collection of enclosed pedestrian footbridges that connect various buildings in 69 full city blocks over 11 miles of downtown Minneapolis enabling people to walk in climate-controlled comfort year-round. The skyways are owned by individual buildings in Minneapolis and as such they do not have uniform opening and closing times. The skyway connects the second and third floors of various office towers, hotels, banks, corporate and government offices, restaurants, and retail stores to the Nicollet shopping district, the Hennepin Avenue Entertainment District, and the sports facilities at Target Center and Target Field. Several condominium and apartment complexes are skyway connected as well, allowing residents to live, work, and shop downtown without having to leave the skyway system. The U.S. Bank Stadium will be connected to the Minneapolis skyway via a mixed-use development of office buildings and apartment complexes in Downtown East, Minneapolis</p>
<p>Taxis</p>	<p>In the City of Minneapolis, taxicabs are licensed by the city. The Minneapolis taxi industry has undergone a period of remarkable growth since the city lifted a longstanding cap on the number of licenses in 2006. In the past five years, the number of licensed cabs in Minneapolis has more than doubled from 373 to 799. Despite the increase in cabs, the number of complaints has not increased. In 2006, 125 complaints were filed. In 2013, it was 120. In downtown Minneapolis and St. Paul, the best places to find available cabs are at hotels. The Twin Cities are unlike New York City for example; you cannot expect to stand on a downtown street corner and hail a passing cab. Downtown Minneapolis is approximately 12 miles from the airport, with fares averaging \$39-\$49.</p>

TRANSPORTATION & WAYFINDING

Uber/Lyft	Both ride sharing services are available in Minneapolis, but not permitted at MSP. The airport is currently exploring authorization of them.
Walking Paths	<p>The City of Minneapolis places a high value on creating and enhancing pedestrian-friendly neighborhoods, because it makes our community a safer and better place to live, work, and enjoy life. Over 92% of streets in Minneapolis have sidewalks on both sides, resulting in nearly 1,800 miles of sidewalks in the city. Minneapolis is home to popular walking destinations such as Nicollet, the Stone Arch Bridge, the Grand Rounds, and Milwaukee Avenue. In October, 2009, the Minneapolis City Council adopted the city's first Pedestrian Master Plan. Minneapolis has an active Sidewalk Inspections Office which inspects sidewalk conditions on a 10-year cycle. Since 2007, the Minneapolis Public Works Department has conducted annual bicyclist and pedestrian traffic counts at locations throughout the city. Pedestrian traffic increased six percent in 2014 to its highest level since 2007. The Grand Rounds Scenic Byway trails and parkways showcase the parks and lakes, gardens, historical sites, and diverse neighborhoods of Minneapolis.</p>
Train	<p>Amtrak provides daily service to St. Paul Union Depot which connects to Minneapolis via the Green Line LRT. The <i>Empire Builder</i> serves the Twin Cities area, terminating at Chicago and Seattle or Portland. This train covers a route similar to the historic <i>Empire Builder</i> of the James J. Hill Great Northern Railway. The Northstar Line commuter train connects the northwest suburbs to Downtown Minneapolis, terminating at a station near Target Field with connections to the light rail. The weekday schedule is oriented to rush hour commuters. There are three trips in each direction on Saturdays and Sundays, and occasional special trips scheduled to take commuters to Twins or Vikings games.</p>

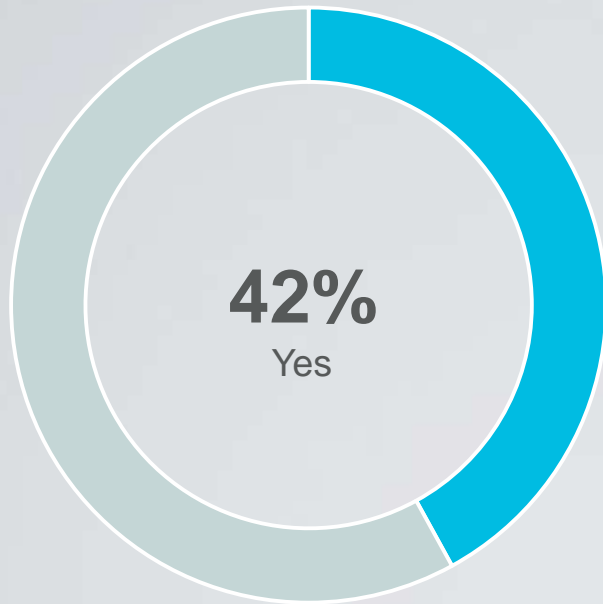
VISITORS MODE OF TRANSPORTATION TO MSP



*274 Miles One Way
on Average*

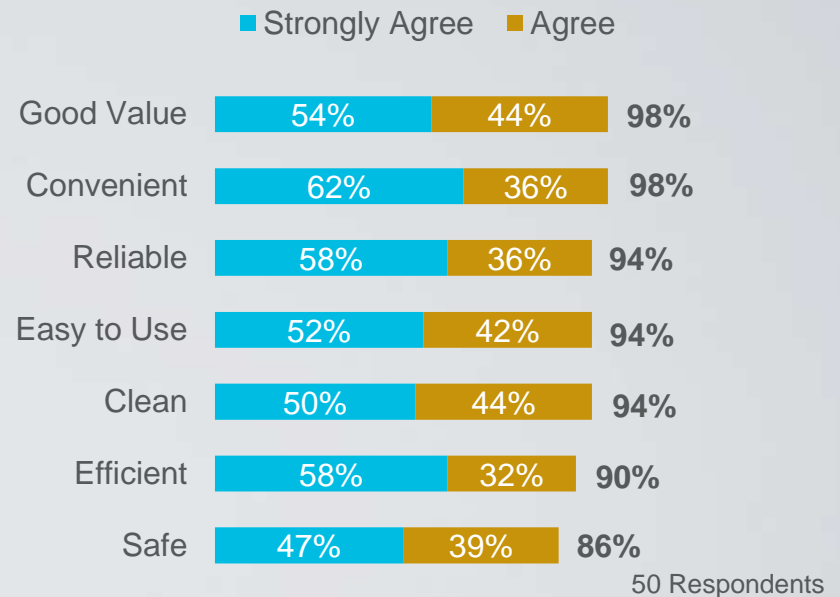
FOUR OUT OF TEN VISITORS USE LIGHT RAIL TRANSIT AND HAVE AN EXTREMELY POSITIVE EXPERIENCE

Question: Did you use the light rail transit?



123 Respondents

Question: Please indicate how much you agree or disagree that each of the following attributes describes the light rail transit. (Five-Point Scale: "Strongly Agree" to "Strongly Disagree").



50 Respondents

APPENDIX



Minneapolis
City by Nature

Meet Minneapolis
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MINNEAPOLIS AS A TOURIST DESTINATION

Strengths

- *Air Access*
- *Arts & Culture*
- *Biking Paths*
- *Clean*
- *Friendly*
- *Green*
- *Lakes, Parks, River*
- *Mass Transit*
- *Nightlife*
- *Quality of Life*
- *Restaurants*
- *Sports (Amateur & Professional)*
- *Venues*

Opportunities

- *Awareness Generation*
- *Events (Public)*
- *Hotel Rooms Proximate to Convention Center*
- *Neighborhoods*
- *Taxi Service Quality*
- *Wayfinding*

Weaknesses

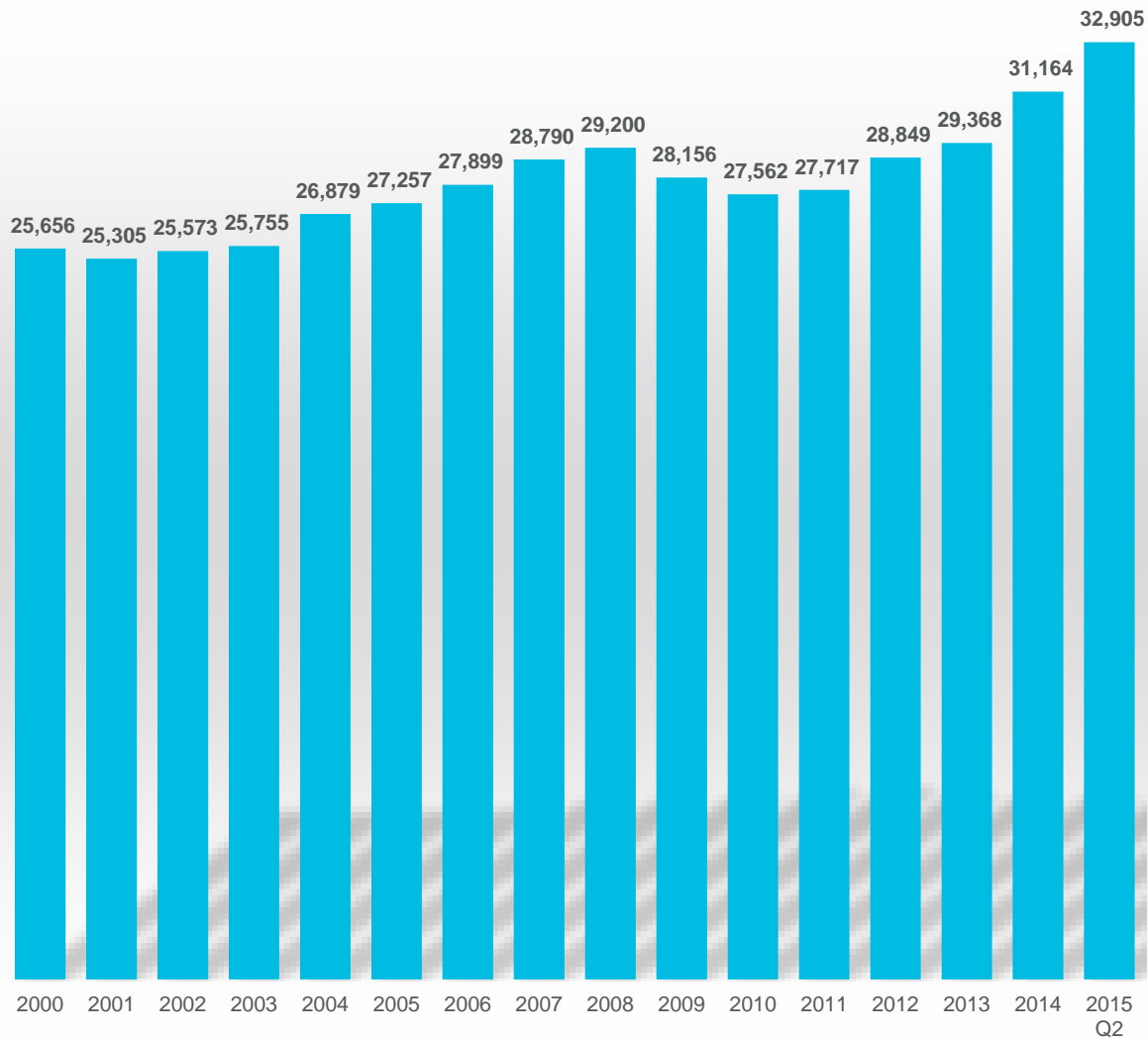
- *Shopping*

Threats

- *Advertising Spend by Other Cities*
- *Infrastructure Development in Other Cities*
- *Perceptions of Minneapolis Weather*



LEISURE AND HOSPITALITY JOBS IN MINNEAPOLIS



Source: Minnesota Department of Employment and Economic Development