STEERING COMMITTEE
“KICK-OFF” MEETING

Tuesday, April 19, 2016
TODAY’S AGENDA

- Welcome: Melvin Tennant
- Introductions: Melvin Tennant
- Background: Melvin Tennant
- Co-Chairs’ Vision: Mayor Hodges and Bob Lux
- TMP Grounding: Kevin Hanstad
- Initial Findings: Kevin Hanstad
- Timeline: Kevin Hanstad
- Role of the Steering Committee: Bill Deef
- Next Steps: Bill Deef
WELCOME & INTRODUCTIONS

- Mayor Betsy Hodges, Co-Chair
- Bob Lux, Alatus, Co-Chair
- David Berg, Carlson, Co-Chair
- Committee
  - Annie Gillette Cleveland, Walker Art Center
  - Brenda Langton, Spoonriver
  - Catherine M. Rydell, American Academy of Neurology
  - Council President Barbara Johnson, City of Minneapolis
  - D. Craig Taylor, CPED
  - Dave Schad, Fleishman Hillard
  - Dennis Probst, MAC
  - Eric Dayton, North Corp
  - Eric Pehle, Weber Shandwick
  - Erick Garcia Luna, City of Minneapolis
  - Irene Quarshie, Target
  - Jayne Miller, Minneapolis Park & Recreation Board
  - Jeff Johnson, Minneapolis Convention Center
  - John Edman, Explore Minnesota Tourism
  - Marion Greene, Hennepin County
  - Matt Hoy, Minnesota Twins
  - Maya Santamaria, Santamaria Broadcasting
  - Melvin Tennant, Meet Minneapolis
  - Michele Kelm-Helgen, Minnesota Sports Facilities Authority
  - Mike Christenson, MCTC Foundation
  - Phil Trier, U.S. Bank
  - Richard Copeland, Thor Construction
  - Shiro “Don” Katagiri, Kiku Enterprises
  - Steve Cramer, Minneapolis Downtown Council
  - Susan Franson, Delta Airlines
  - Tom Jollie, Padilla
  - Tom Mahlke, Mid-States
Pioneered a TMP in San Antonio in 2006

Post-recession tourism & meetings market has become extremely competitive

A TMP will position Minneapolis as a strategic player

Minneapolis is on the leading edge
CO-CHAIRS’ VISION
A tourism master plan 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.

Tourism, unlike other major industries, is highly fragmented and consists of multiple independent industries:

- Hotels
- Restaurants
- Retail Stores
- Professional Sporting Teams
- Arts & Cultural Institutions
- Entertainment Venues

A tourism master plan unifies these disparate industries by developing a singular vision to improve all, as well as the city infrastructure, for the benefit of tourists.
Tourists reciprocate by spending money which becomes:

- Revenue for local businesses
- Wages for local residents
- Tax revenue for local government
- Reduction in tax burden on residents

The hospitality industry has a vested interest in proactive collaboration with all the entities which shape and impact, either positively or negatively, the personal experience of each and every visitor.

A TMP provides a forum to curate the whole experience of a visitor from arrival to departure.

However, of significant importance, improvements identified in such a plan also benefit the local community by conserving natural and cultural resources for the enjoyment of the current residents as well as future generations.
Plan Outcomes

- A strategic vision and concrete action plan to enhance the city as a tourist destination
- Action plan owners with accountability
- Performance metrics
- Alignment across the tourism industry
- Organized advocacy for achieving a “whole experience” for visitors
- Efficiency and cost effectiveness through public/private collaboration
- Raised profile as a tourist and meetings destination
- Preservation of cultural and natural assets
- Increased business revenues
- Increased sales tax revenues
- Job creation (including gateway jobs)
- Attraction of new residents
TOURISM MASTER PLANNING

PLANNING STRUCTURE

These committee focus areas are examples and may change depending on the outcome of the grounding and outreach stages.

- CO-CHAIRS
- STEERING COMMITTEE
  - VISITOR EXPERIENCE
  - TRANSPORTATION & WAYFINDING
  - PRODUCT/INFRASTRUCTURE DEVELOPMENT
  - ADVOCACY & PUBLIC AFFAIRS
  - POLICY & GUIDELINES
- STAFF SUPPORT
  - MEET MINNEAPOLIS
  - CPEO
  - CONSULTANT
  - PARTNER ORGANIZATIONS
TOURISM MASTER PLANNING

1. GROUNDING (Four Months)
   - Planning procedure development
   - Market assessment
   - Private fundraising
   - Steering committee member selection

2. OUTREACH (Four Months)
   - Community workshops
   - Analyze and prioritize community feedback
   - Determine areas of focus for subcommittees
   - Subcommittee member selection

3. PLAN DEVELOPMENT (Four Months)
   - Subcommittees develop plans
   - Produce Destination Transformation 2030 document

4. IMPLEMENTATION (Ongoing)
   - Publish report
   - Implementation task force member selection
   - Implement plan
INITIAL FINDINGS FROM GROUNDING & OUTREACH
MINNEAPOLIS-ST. PAUL VISITORS (MILLIONS)

2010: 25.3
2011: 26.8
2012: 27.9
2013: 29.4
2014: 30.9
2015: 32.9
2016: 34.8
2017: 36.8

Sources: D.K. Shifflet & Associates, Ltd. 2010-2014
Meet Minneapolis 2015-2017
MINNEAPOLIS-ST. PAUL VISITOR SPENDING (BILLIONS)

VISITORS AND SPENDING BY TRIP PURPOSE (2014)

VISITORS: 30.9 MILLION
- Business 28%
- Leisure 72%

VISITOR SPENDING: $7.4 BILLION
- Business 31%
- Leisure 69%

Three Out of Four Visitors Are From The Five State Area

Person-Stays Based, n = 1,509
LENGTH OF STAY

Average Among Overnight Visitors: 2.3 Nights

Stays Based, n = 1,512
VISITOR ACTIVITIES

Stays Based, n = 1,512
VISITORS’ QUALITY OF EXPERIENCE

Minneapolis Rank Among 121 American Cities¹

- Arts & Entertainment: 4
- Overall Tourism: 26
- Nature & Parks: 31
- Nightlife: 37
- Shopping: 37
- Restaurants: 37

¹ Rankings derived from visitor ratings of “very good” or “excellent” on social media such as Trip Advisor and Yelp. Source: 2015 Minneapolis Tourism Quality Performance Report, Resonance Consultancy Ltd.
LEISURE TRAVELER AWARENESS (UNAIDED)

“When you think of American cities to visit, which ONE comes to mind first?”

“When still thinking about American cities to visit, what other cities come to mind?”

Source: Meet Minneapolis Awareness Tracking Study, September 2012
n = 250
LEISURE TRAVELERS’ PERCEPTIONS OF MINNEAPOLIS

“If you were planning a trip to Minneapolis, how would you rate the following attributes (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”))

- Friendly: 72%
- Down to Earth: 70%
- Many Lakes Within the City: 65%
- Clean: 63%
- Beautiful: 57%
- Safe: 55%
- Cultural: 55%
- Good Shopping: 54%
- Fun: 50%
- Active Year Round: 50%
- Lots to Do: 49%
- Creative/Artistic: 48%
- Easy to Get Around: 45%
- Natural/"Green": 43%
- Vibrant: 40%
- Unique: 38%
- Innovative: 35%
- Sophisticated: 30%
- Fast Pace: 28%
- Cold Year Round: 26%
- Hip: 23%

Source: Meet Minneapolis Awareness Tracking Study, September 2012
n = 250
MEETINGS, CONVENTIONS & SPORTING EVENTS HOSTED BY MEET MINNEAPOLIS

<table>
<thead>
<tr>
<th>Year</th>
<th>Events</th>
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<tbody>
<tr>
<td>2007</td>
<td>322</td>
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<tr>
<td>2008</td>
<td>296</td>
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<td>2013</td>
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<td>2014</td>
<td>534</td>
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<tr>
<td>2015</td>
<td>609</td>
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Source: iDSS
WHAT KIND OF CITY ARE WE?

MEET MINNEAPOLIS ANNUAL MEETING
WHAT KIND OF CITY SHOULD WE BECOME?

MEET MINNEAPOLIS ANNUAL MEETING
<table>
<thead>
<tr>
<th>FREQUENT</th>
<th>LESS FREQUENT</th>
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<tbody>
<tr>
<td><strong>Adult Getaway</strong></td>
<td>Sports &amp; Concerts</td>
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<tr>
<td>Sports, Nightlife &amp; Restaurants</td>
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<tr>
<td><strong>“Splurge”</strong></td>
<td>Cost Conscious</td>
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<tr>
<td>Price Not an Issue</td>
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<tr>
<td>Hotel Proximate to Event</td>
<td>Safety Concerns</td>
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<tr>
<td><strong>“Party”</strong></td>
<td>Very Little Awareness of Arts &amp; Culture</td>
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<tr>
<td>Museums</td>
<td><strong>“A lot to do in Fargo”</strong></td>
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<tr>
<td>“Hoity Toity”</td>
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<td>Parks</td>
<td>Hosts Act as Guides</td>
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<tr>
<td>“Got em in Fargo”</td>
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<tr>
<td>“Winnipeg is a hassle”</td>
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<tr>
<td>Group</td>
<td>Date</td>
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<td>------------------------------------------------------------</td>
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<tr>
<td>Meet Minneapolis Staff</td>
<td>February 25(^{th})</td>
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<td>Meet Minneapolis Annual Meeting Attendee Survey</td>
<td>March 2(^{nd})</td>
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<tr>
<td>Hotel General Managers &amp; Directors of Sales</td>
<td>March 29(^{th})</td>
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<td>Big Brothers Big Sisters of Greater Twin Cities</td>
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<td>Travel Writers Survey</td>
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<td>DMAI DestinationNEXT Online Diagnostic Tool</td>
<td>April 8(^{th})</td>
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<td>June 5&lt;sup&gt;th&lt;/sup&gt; – October 1&lt;sup&gt;st&lt;/sup&gt;</td>
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<td>June 25&lt;sup&gt;th&lt;/sup&gt; &amp; 26&lt;sup&gt;th&lt;/sup&gt;</td>
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<td>Key Stakeholder One-on-One Interviews</td>
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<td>Hotel Concierge Survey</td>
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<td>Event Planners’ Survey</td>
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<tr>
<td>Visitors’ Survey</td>
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TIMELINE

GROUNDING
January - August

OUTREACH
March - Aug

PLANNING

IMPLEMENTATION

Meet to Determine Sub-Committees
August

Three Sub-Committee Meetings
October / November
ROLE OF STEERING COMMITTEE

- Governing Body
- Strategic Guidance
- Sub-Committee Determination
- Sub-Committee Leadership
- Sub-Committee Participation
- Review of the Plan Draft
- Ambassador to the Community
NEXT STEPS

- Steering Committee Members’ One-On-One Interviews with Consultant
- Thoughts on Meeting Between Now and August Sub-Committee Determination Meeting
- Lead Time Required to Schedule Meetings