TOURISM MATTERS

Visit ROSEVILLE MINNESOTA

VISIT ROSEVILLE

Mission: Transform our community by promoting Roseville as a place to work, play and stay.
Vision: “Perfectly Positioned” to bring people together into a welcoming and vibrant community.

MINNESOTA TOURISM 2020*

DAILY IMPACT

$32 Million in average daily sales at Minnesota leisure and hospitality businesses in 2020

RETURN ON INVESTMENT

Every $1 invested in state tourism marketing returns an estimated:
-$180 in spending by travelers
-$18 in state and local taxes

LEISURE & HOSPITALITY JOBS

- More than 205,000 jobs
- 9% of private-sector employment
- $4.9 billion in wages

2020 NUMBERS

$11.7 Billion in gross sales, resulting in $731 Million in state sales tax revenue and employed over 205,000 people.

2019 NUMBERS

$16.6 Billion in gross sales, resulting in $1.1 Billion in state sales tax revenue and employed over 276,000 people.

RECOVERY

According to the U.S. Travel Association, Minnesota’s industry has suffered a nearly $12 Billion loss since 2019.

Business recovery has been uneven.

Minnesota businesses are recovering from pandemic impacts at different rates by sector. Generally, overnight accommodations and attraction and entertainment companies are recovering better than food and drink establishments.

As of late 2021, Only 39% of Minnesota leisure and hospitality firms surveyed by Explore Minnesota report being at or above pre-pandemic business levels.

Source: Explore MN Tourism, Hospitality Minnesota and Federal Reserve Bank of Minneapolis, Late 2021 Survey of MN Tourism and Hospitality Industry

VISITORS

Top Market Visitation to Roseville YTD 2022

Fargo
La Crosse – Eau Claire
Mason City, IA
Minot – Bismarck
Duluth

Points of Interest

University of MN – Saint Paul
MN State Fairgrounds
Rosedale Center
Har Mar Mall
Crossroads of Roseville

Source: Zartico, September 2022

*Source: Minnesota Department of Revenue, SMARI 2019 Tourism Advertising ROI/Economic Impact Study, U.S. Bureau of Labor Statistics Quarterly Census of Employment and Wages (2020)

ROSEVILLE TOURISM

Visit ROSEVILLE MINNESOTA

Road to Recovery

2021 WEBSITE STATS

Sessions: 76,643
Users: 67,176
Page Views: 118,584

YTD **2022** WEBSITE STATS

Sessions: 70,951
Users: 59,888
Page Views: 109,623

Current Stats

FACEBOOK

16,000 FOLLOWERS

INSTAGRAM

1,965 FOLLOWERS

E-NEWSLETTER
MONTHLY NEWSLETTER

16,000+ SUBSCRIBERS
ON A MONTHLY BASIS

RVA VISITOR GUIDE
+ COUPONS

10,000 PRINTED
ANNUALY

Economic Impact Pre & Post COVID

2019
Room Revenue Generated from Tourism
$34,054,088

2020
Room Revenue Generated from Tourism
$15,685,550

2021
Room Revenue Generated from Tourism
$22,861,799

Our Visitor:

Average number of guests that stay in a Roseville hotel every night
2,283

Shoppers at Rosedale Center per year
16 Million

Students at 10 colleges within 10 miles of Roseville
100,000+

*Based on 2.3 people per room. STR report Smith Travel Research

2022 – Year in Review
2023 – Look ahead

Visit
ROSEVILLE
PERFECTLY POSITIONED

Visit ROSEVILLE MINNESOTA

VISIT ROSEVILLE

Mission: Transform our community by promoting Roseville as a place to work, play and stay.
Vision: “Perfectly Positioned” to bring people together into a welcoming and vibrant community.

MINNESOTA TOURISM 2020*

DAILY IMPACT

$32 Million in average daily sales at Minnesota leisure and hospitality businesses in 2020

RETURN ON INVESTMENT

Every $1 invested in state tourism marketing returns an estimated:
-$180 in spending by travelers
-$18 in state and local taxes

LEISURE & HOSPITALITY JOBS

- More than 205,000 jobs
- 9% of private-sector employment
- $4.9 billion in wages

2020 NUMBERS

$11.7 Billion in gross sales, resulting in $731 Million in state sales tax revenue and employed over 205,000 people.

2019 NUMBERS

$16.6 Billion in gross sales, resulting in $1.1 Billion in state sales tax revenue and employed over 276,000 people.

RECOVERY

According to the U.S. Travel Association, Minnesota’s industry has suffered a nearly $12 Billion loss since 2019.

Business recovery has been uneven.

Minnesota businesses are recovering from pandemic impacts at different rates by sector. Generally, overnight accommodations and attraction and entertainment companies are recovering better than food and drink establishments.

As of late 2021, Only 39% of Minnesota leisure and hospitality firms surveyed by Explore Minnesota report being at or above pre-pandemic business levels.

Source: Explore MN Tourism, Hospitality Minnesota and Federal Reserve Bank of Minneapolis, Late 2021 Survey of MN Tourism and Hospitality Industry

VISITORS

Top Market Visitation to Roseville 2022

Fargo
La Crosse – Eau Claire
Mason City, IA
Minot – Bismarck
Duluth

Points of Interest

University of MN – Saint Paul
MN State Fairgrounds
Rosedale Center
Har Mar Mall
Crossroads of Roseville

Source: Zartico, 2022

*Source: Minnesota Department of Revenue, SMARI 2019 Tourism Advertising ROI/Economic Impact Study, U.S. Bureau of Labor Statistics Quarterly Census of Employment and Wages (2020)

Road to Recovery

2021 WEBSITE STATS

Sessions: 76,643
Users: 67,176
Page Views: 118,584

2022 WEBSITE STATS

Sessions: 97,161
Users: 82,590
Page Views: 147,699

Current Stats

FACEBOOK
16,000 FOLLOWERS

INSTAGRAM
2,000 FOLLOWERS

E-NEWSLETTER
MONTHLY NEWSLETTER
16,000+ SUBSCRIBERS
ON A MONTHLY BASIS

RVA VISITOR GUIDE
+ COUPONS
10,000 PRINTED
IN 2022

Economic Impact Pre & Post COVID

2019
Room Revenue Generated from Tourism
$34,054,088

2020
Room Revenue Generated from Tourism
$15,685,550

2021
Room Revenue Generated from Tourism
$22,861,799

Our Visitor:

Average number of guests that stay in a Roseville hotel every night
2,283

Shoppers at Rosedale Center per year
16 Million

Students at 10 colleges within 10 miles of Roseville
100,000+

*Based on 2.3 people per room. STR report Smith Travel Research

Total Group Room Nights

- **2019**
- Total Room Nights: 15,582
- Total Definite Leads: 88
- Total Estimated Impact: $5,917,983.00

- **2021**
- Total Room Nights: 10,129
- Total Definite Leads: 57
- Total Estimated Impact: $3,808,055.00

- **2022**
- Total Room Nights: 9,945
- Total Definite Leads: 46
- Total Estimated Impact: $2,571,900.00

Outlook for 2023 from U.S. Travel

Key Forecast Drivers

MILD RECESSION IN 2023

Oxford Economics has cut their 2023 U.S. GDP forecast from 0.0% to -0.5%. The mild recession will be driven by elevated prices, more costly borrowing rates and weaker corporate earnings that will cause a retrenchment in consumer spending, business investment and hiring in the first half of 2023. The forecast for 2022 real GDP growth is unchanged at 1.7%.

WANING COVID CONCERNS

The forecast assumes that, while surges and outbreaks may continue, Covid is no longer a major cause of death and would not be a major concern for travelers. It assumes that future variants do not represent substantial changes to this assumption.

INFLATION TO STAY UNCOMFORTABLY HIGH

Inflation remained stubbornly high in 2022 with Covid-related China lockdowns as well as the ongoing Russia-Ukraine war placing further stress on already strained supply chains, though supply stress eased in recent months. Inflation remains high, but growth in food and gasoline prices has moderated. The forecast assumes that the descent in the pace of inflation will be very gradual, remaining well above the Fed's 2% target through 2023.

LABOR SHORTAGES

The travel-dependent Leisure and Hospitality (L&H) industry is still suffering strong employment losses—6.5% of pre-pandemic jobs remained lost in October 2022—and while the sector has posted sufficient job openings for a full recovery, it is struggling to hire the workers it needs. While the overall U.S. labor market remains extremely tight, the forecast assumes that the employment situation will gradually improve in the coming months, aiding the travel industry's recovery.

CONSUMER SPENDING RESILIENCE

While consumers' tolerance to high inflation will continue to be tested, an ongoing rotation of spending towards sorely-missed services, such as travel, is expected to continue to underpin consumer spending. However, consumer spending is poised to weaken as the labor market softens, wage growth slows and excess savings dwindle.

PENT-UP DEMAND AND STRONG HOUSEHOLD BALANCE SHEETS

Despite the expectation of a recession, the travel industry is not showing signs of weakness and pent-up demand remains significant going into 2023. Among higher income households, balance sheets are strong with still-substantial excess savings.

Travel Predictions

U.S. Travel Forecast projects the following:

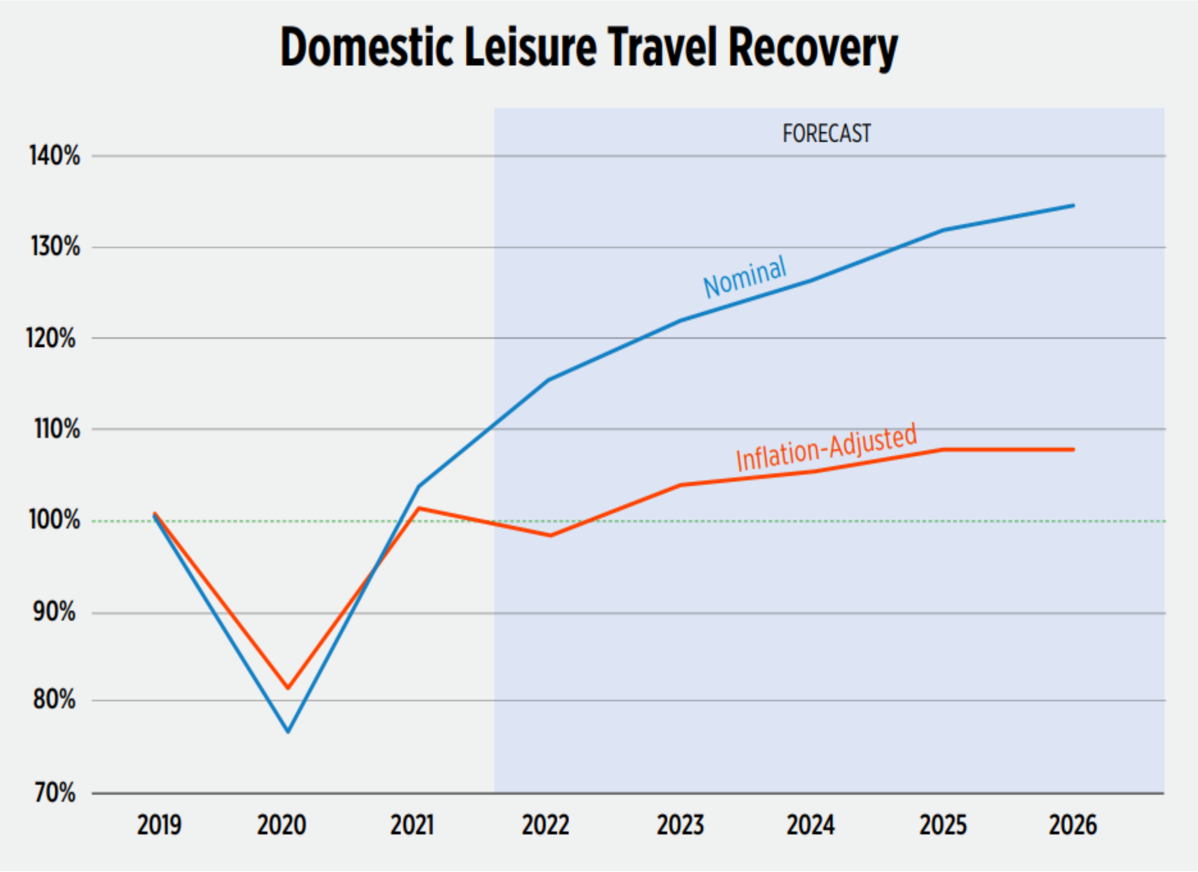
Continued resilience of domestic leisure travel, which has surpassed pre-pandemic levels

Continued improvement in domestic business travel, with a slight slowdown in 2023 as the economy enters a mild recession. A full recovery in terms of volume is still forecast for 2024, but inflation-adjusted spending recovery remains beyond the range of the forecast

Sluggish recovery for international inbound travel as it continues to face headwinds, with a full recovery not expected prior to 2025

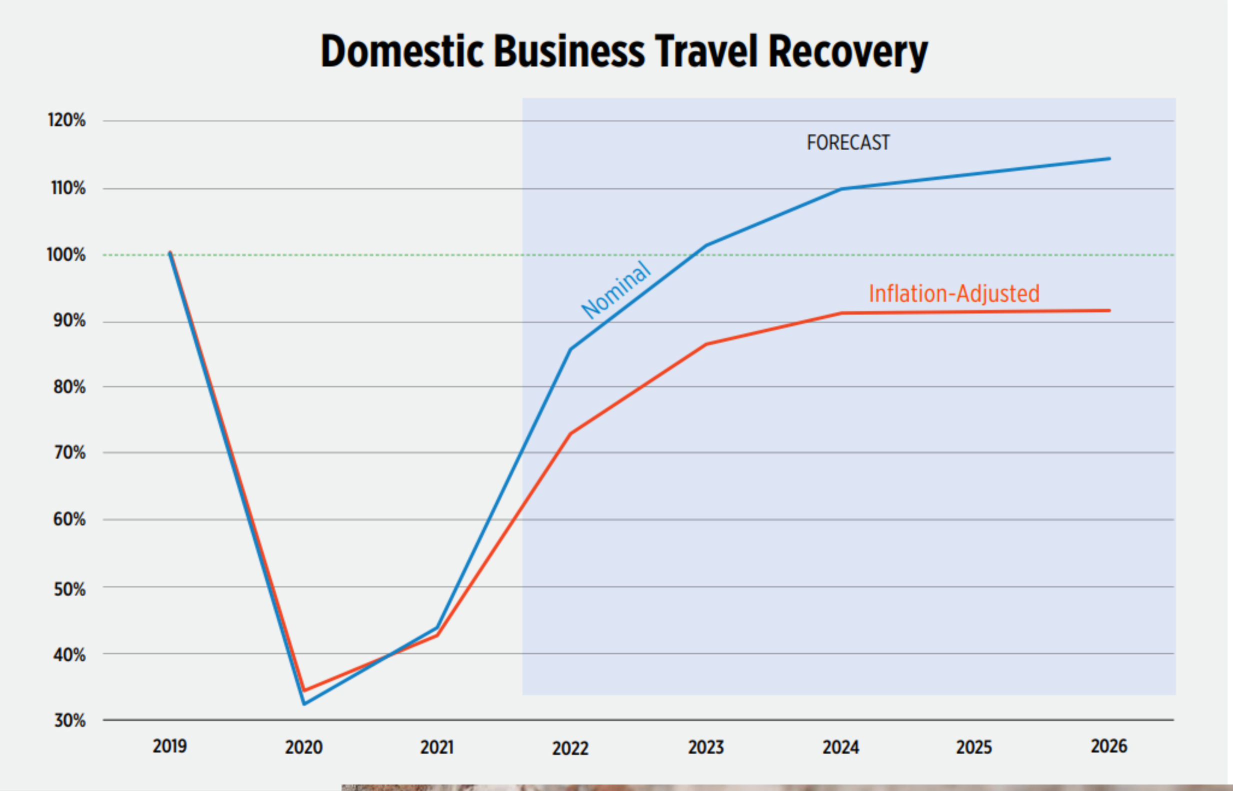
Domestic Leisure Travel Spending:
Expanding to New Heights

- **Domestic leisure travel is continuing to drive the U.S. travel recovery and has basically recovered to pre-pandemic levels.**
  - Nevertheless, there was a gradual decline in inflation-adjusted spending in 2022. While people are spending more per trip in nominal terms, the increase has not kept pace with prices and thus they are spending slightly less in real terms (ie: they are buying slightly less or doing less etc.).
- **Pent-up demand will drive the recovery in the short-term, though its effects will level off and gains in 2023 and beyond are expected to be more modest.**
- The latest forecast projects that domestic leisure spending will be largely resistant to the expected recession, and will reach 104% of pre-pandemic levels by 2023, after adjusting for inflation.



Domestic Business Travel Spending:
On a Solid Path of Recovery

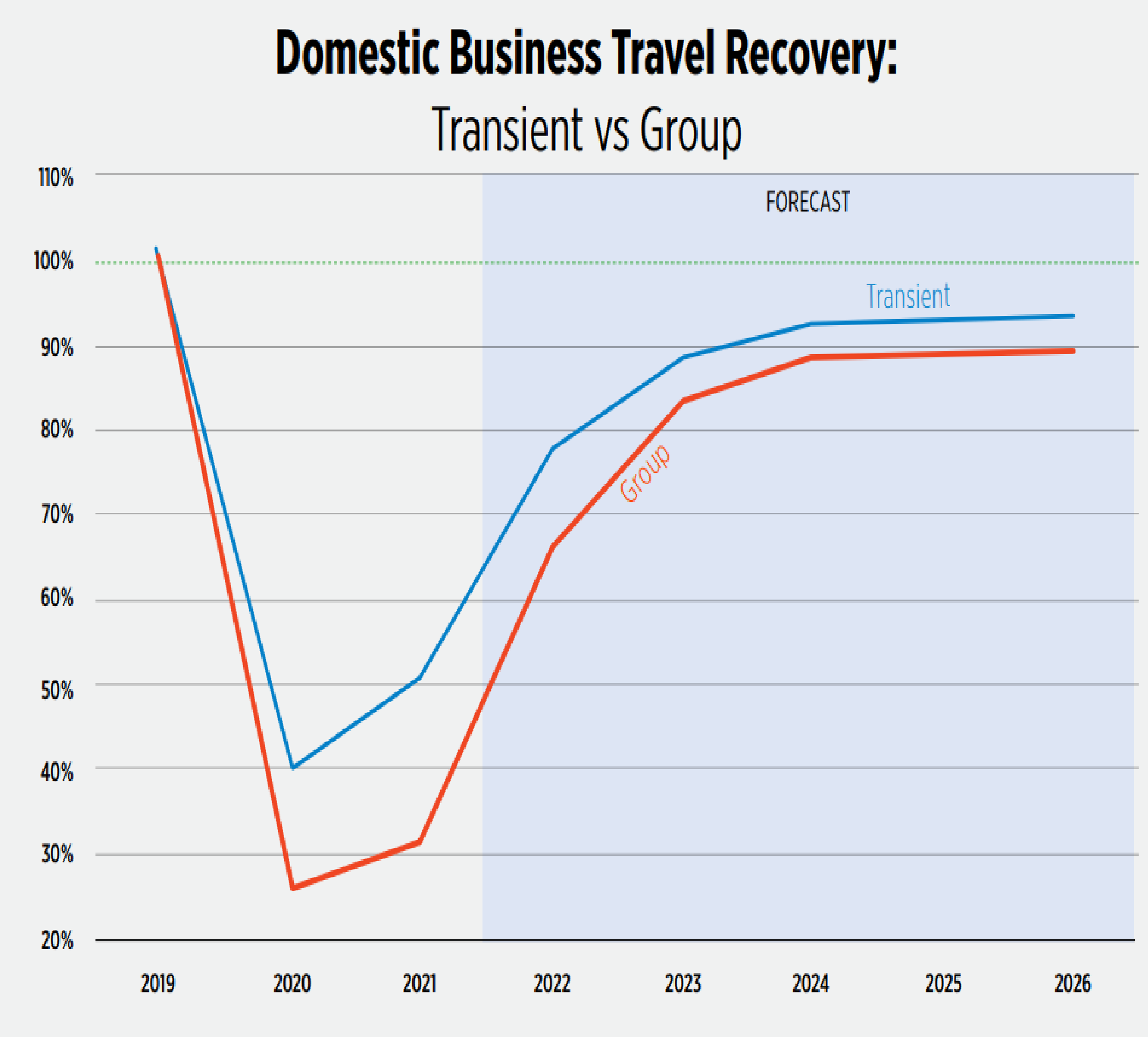
- **Business travel spending continues to lag far behind leisure but has improved significantly in recent months.**
- **It is expected to keep growing strongly into 2023 Q1 before slowing down as the economy enters a recession.**
- The oncoming recession along with higher borrowing costs will weigh on corporate profits, hiring and business investment.
- The difference between volume and real spending recovery is more pronounced for business than for leisure, due to stronger cost cutting measures among many businesses in terms of spending per trip. **While visitations are projected to recover in 2024, inflation-adjusted spending is not projected to recover within the range of the forecast** (though nominal spending will recover much faster).
- Domestic business travel spending is expected to grow (in inflation-adjusted terms) from 73% of 2019 levels in 2022 to 87% in 2023 and 92% in 2026.



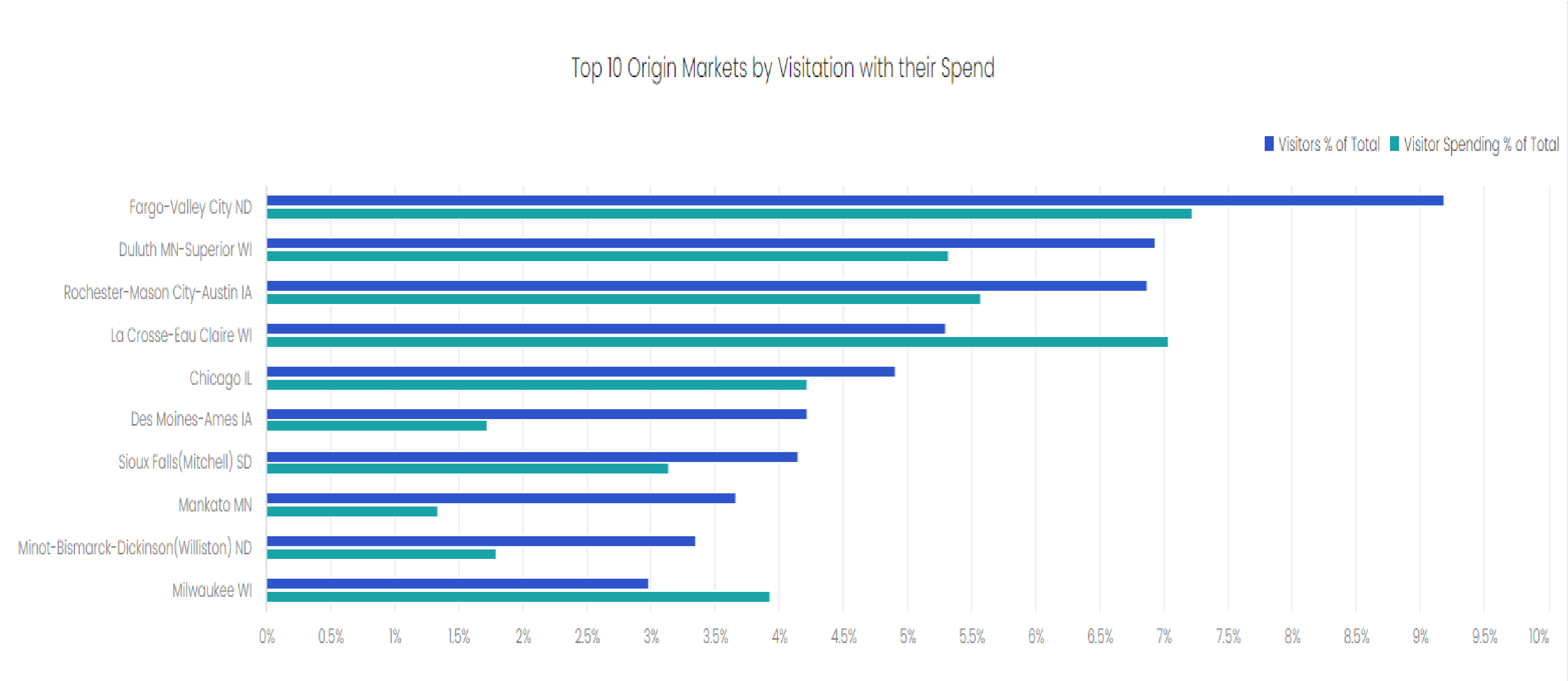
DOMESTIC LEISURE DOMESTIC BUSINESS INTERNATIONAL

Domestic Business Travel: **Transient vs Group**

- Business travel can be split into two major categories—transient and group—and their expected paths of growth will vary:
- **Transient business** travel generally consists of individual or small group business trips for general business needs such as visiting clients, making sales calls, repairing or servicing equipment or receiving training.
- **Group business** travel generally consists of travel to meetings, events or trade shows.
  - **Transient** domestic business travel has performed better than **group** but the gap has narrowed—due to faster YOY growth for group than transient—and it is expected to continue to narrow throughout the timeline of the forecast.
  - When adjusted for inflation, spending in both segments is expected to reach near, but not fully recover to pre-pandemic levels.



Zartico - Data

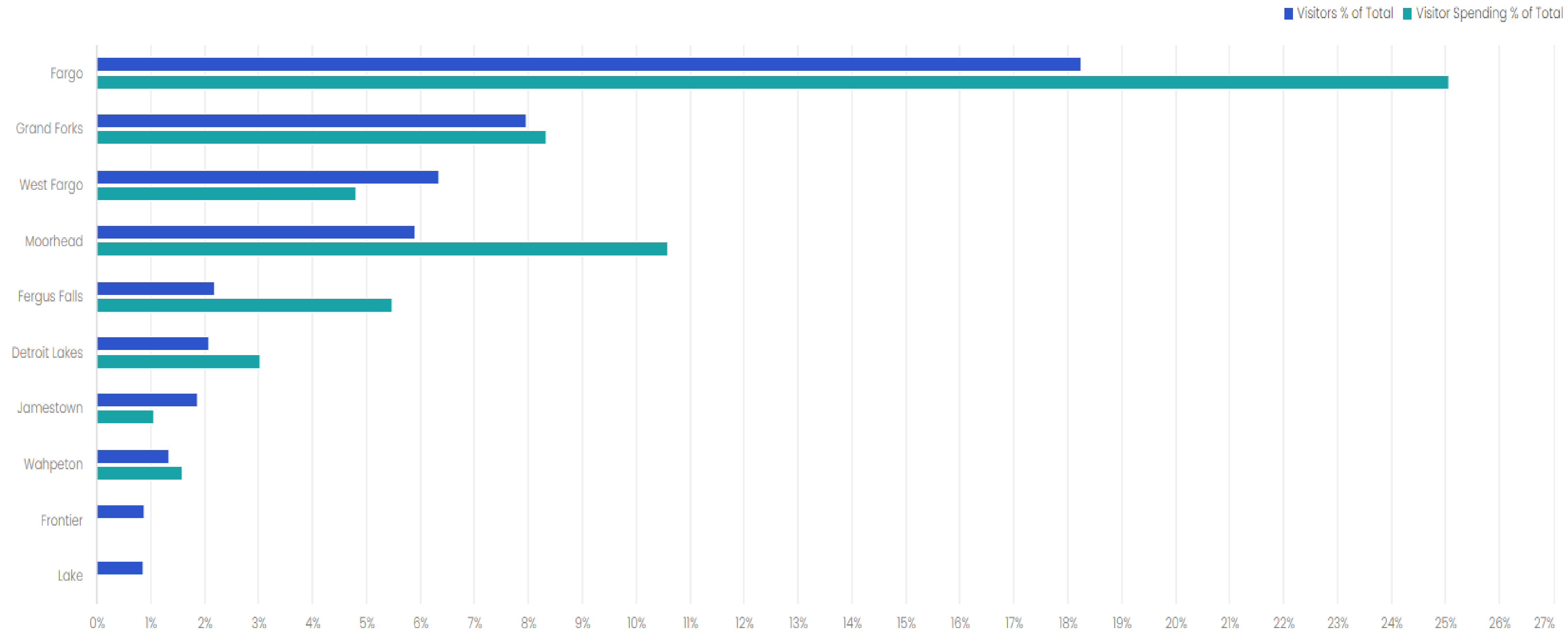


How are your hotels performing?

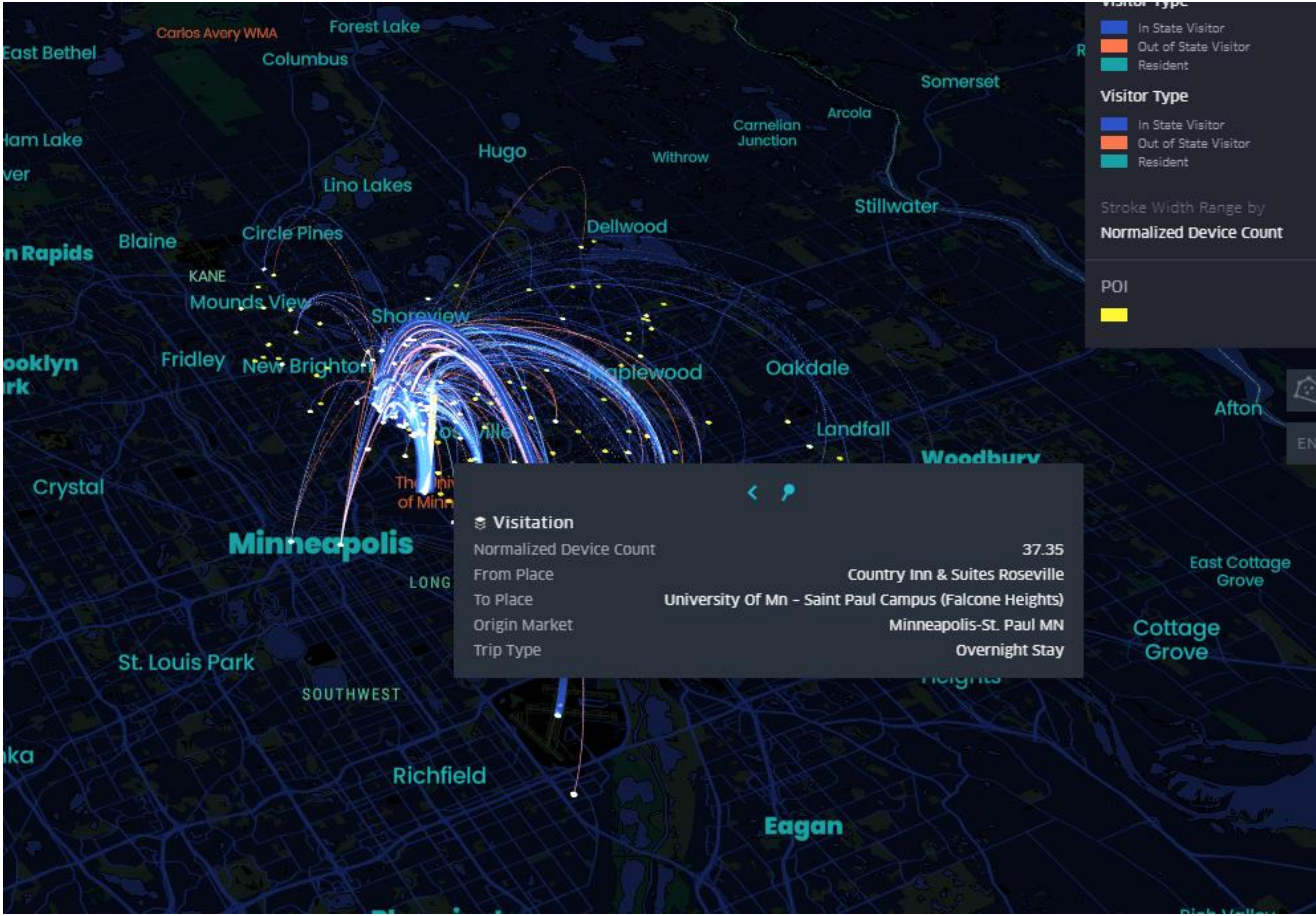
ource: Smith Travel Research (STR). Note: All KPIs are set for to display data for the STR Geography that most closely matches your destination boundary. STR Monthly files are delivered on the 18th of each month, esulting in comparisons between partial periods of data this year and complete periods of data from last year. Tip: To see the date or your most recent data loaded from STR, see the Data Check section at the ottom of this module.

Hotel Occupancy	Hotel Average Daily Rate	Hotel Revenue	Hotel Demand
57.6%	$107	$27.6 M	1.4 M
↗ 16% change · 49.5% prev. year	↗ 17% change · $91 prev. year	↗ 22% change · $22.6 M prev. year	– change · – prev. year

Top 10 Origin Markets by Visitation with their Spend › Fargo-Valley City ND




Visitation
Visitor Type
In State Visitor
Out of State Visitor
Resident
Visitor Type
In State Visitor
Out of State Visitor
Resident
Stroke Width Range by
Normalized Device Count
POI
EN
Otisville
Forest Lake
Columbus
Somerset
Arcola
Carnelian Junction
Hugo
Withrow
Lino Lakes
Stillwater
Circle Pines
Dellwood
Mounds View
New Brighton
Oakdale
Afton
Landfall
Woodbury
The University of Minnesota
Saint Paul
Minneapolis
South St. Paul
East Cottage Grove
LONGFELLOW
Cottage Grove
Inver Grove Heights
SOUTHWEST
Richfield
Eagan



Visitor Type
In State Visitor
Out of State Visitor
Resident
Visitor Type
In State Visitor
Out of State Visitor
Resident
Stroke Width Range by
Normalized Device Count
POI
EN
Visitation
Normalized Device Count 37.35
From Place Country Inn & Suites Roseville
To Place University Of Mn - Saint Paul Campus (Falcone Heights)
Origin Market Minneapolis-St. Paul MN
Trip Type Overnight Stay
Carlos Avery WMA
Forest Lake
East Bethel
Columbus
Somerset
Arcola
Carnelian Junction
Hugo
Withrow
Lino Lakes
Stillwater
Dellwood
Circle Pines
Blaine
KANE
Mounds View
Shoreview
Fridley
New Brighton
Oakdale
Landfall
Woodbury
Afton
Crystal
Minneapolis
LONG
East Cottage Grove
Cottage Grove
St. Louis Park
SOUTHWEST
Richfield
Eagan

Why Wayfinding Matters

Tourism is critical to the vibrancy of the community + save homeowners $625 in property taxes

Rosedale Center attracts over 14 million visitors annually

More than a quarter of Roseville business fall into the Retail Trade, Accommodations or food service sectors = Hospitality

We have a wealth of **online** wayfinding - we need **physical** to help welcome and guide

Wayfinding Masterplan Process

PHASE 1: PROJECT INITIATION

PHASE 2: SURVEY & EVALUATION

PHASE 3: ANALYSIS OF FINDINGS AND NEEDS

PHASE 4: DESIGN & STRATEGY DEVELOPMENT

PHASE 5: FINAL DESIGN & DOCUMENTATION

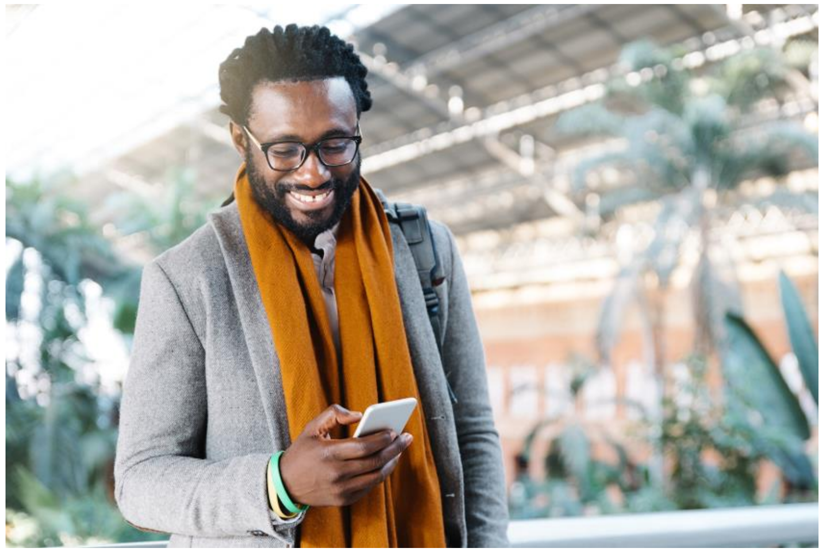
Langton Lake Park pier and trails
Langton Lake Park ballfields
access to park ballfields
480 ft
(7.2 sec) + (3.2 sec for ballfield picto)
wayfinding sign
access to park fishing pier, trails and lodging
wayfinding sign
500 ft
(7.6 sec.) + (1.9 sec for pier picto)
Owens Corning Warehouse
avid hotel Roseville - Minneapolis North
Residence Inn Minneapolis St. Paul/
Langton Lake Drive
Applewood Pointe of Roseville at Langton
Langton Lake Park Lacrosse Field
Langton Lake Park
Transwestern
SVL, Inc
Centre Pointe Dr
Courtyard Minneapolis St. Paul/Roseville
Custom Cap & Tire
Partridge Rd
Certified Painting
Cardinal Health
Fresenius Kidney Care New Brighton
Timberwolf Fitness
Langton Lake
County Rd C2 W
Langton Lake Parking Lot
Rosedale Chevrolet Service
Rosedale Chevrolet
CPC - Colder Products Company
Jeff Belzer Roseville Chrysler Dodge Jeep Ram
Veritas Technologies
Long Lake Rd
Fairview Ave N
CPI Card Group
Google Earth


City Hall
Civic Center
Central Park
LEFT LANE
© 2023 Google

Website Redesign

www.visitroseville.com

- Awarded an Explore MN Grant in the amount of $20,000 for the website redesign
- Responsive Design- templates do not drive the website but rather content and images
- Search Engine Optimization (SEO) to enable travelers to discover Roseville
- Content Strategy to become the most valuable online resource
- Ability to update info on IDSS, our current sales system with integrated website updates simultaneously



- Community Activation - the right strategy and technology to create value for the community
- Designed to reach the right traveler, at the right time, with the right message across all devices

Professional & Community Engagement:

- Julie Wearn
  - Roseville Rotary & Chair Rotary District 5960 Annual Awards, Every Meal Brimhall volunteer
  - Roseville Police Foundation Vice Chair & Chair Golf Tournament
  - U of MN Tourism Advisory Council
  - BOD Member MACVB & Education Chair
- Liz Nowak
  - Metro Committee – Marketing Chair
  - Leadership Saint Paul

Shannon Thomasser

- Associations North BOD
- Friends of OVAL Board Member
- FORParks
- MN Sports Alliance

ST PAUL AREA CHAMBER

Rotary

ROSEVILLE POLICE FOUNDATION

MINNESOTA MACVB ASSOCIATION OF CONVENTION & VISITORS BUREAUS minnesotacvbs.com

SUMMARY

- Leisure travel is back for 2023
- Corporate and group travel slow to recover
- Marketing to visitors through the new website and utilizing data from Zartico
- Wayfinding master plan completed & initial signage installed this year
- Questions?