



Louisiana Travel Pulse

Spring 2004

The Louisiana Travel Pulse is a seasonal industry travel barometer designed to present recent trends in travel industry performance. This issue's emphasis is on the **Spring 2004** season (**March 2004 –May 2004**). Performance measures are primarily presented to show differences in levels from one year ago. However, much of the following data also illustrates the most recent twelve to eighteen-month trend as well. Some indicators also show comparisons of national and/or regional trends when data is available. The following Pulse has three primary parts. The first part shows statewide indicators for hotels, airports, visitor centers, riverboat gaming, parks, and attractions (pages 2-10). The second part of the Pulse contains a regional analysis of the **Spring** season using some of these same indicators (pages 11-12). The final element contains leading indicators (pages 13-14).

The Louisiana Travel Pulse is published quarterly by the Office of Tourism within the Louisiana Department of Culture, Recreation and Tourism. Any questions or issues concerning this Pulse should be directed to the Research Section, Louisiana Office of Tourism, Post Office Box 94291, Baton Rouge, Louisiana 70804-9291 or by calling 225-342-8100.

Spring 2004 Performance At-A-Glance

Hotel Occupancy Rate: +4.5%
Hotel ADR: -1.3%
Hotel Room Supply: +1.7%
Hotel Room Demand: +6.3%
State Visitor Center Visitors: -2.0%
Riverboat Gaming Revenue: -2.1%
Airport Enplanements: +2.6%
State Parks Visitors: -10.3%
Local Information Center Visitors: +8.7%
Attractions Visitors: -7.4%

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Note: These Louisiana indicators show the percentage difference from Spring 2003 to Spring 2004.

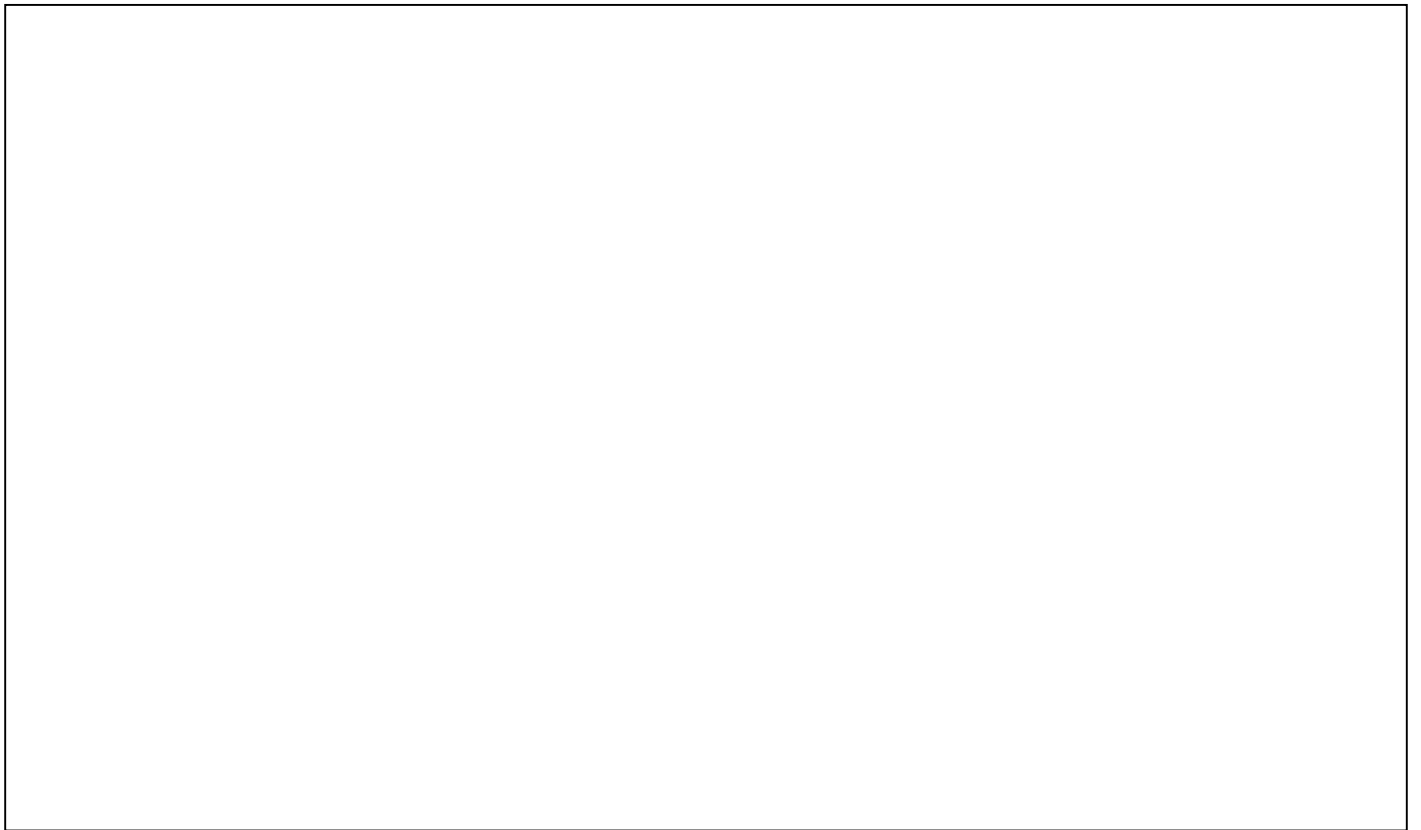
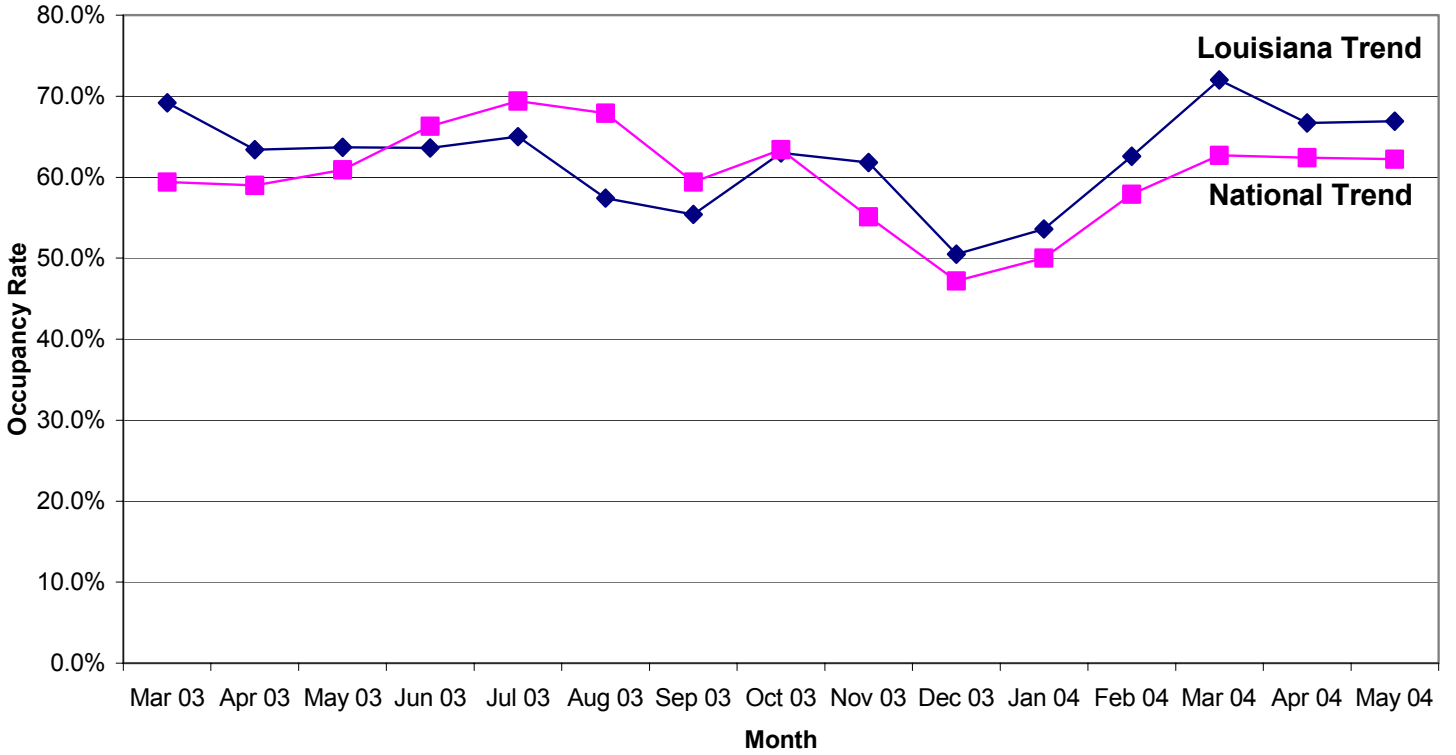
Factors Influencing Spring 2004 Travel To Louisiana

Most travel experts agree Spring 2003 travel was down due to the buildup and the start of the Iraqi Freedom campaign, and this subsequently produced some artificially inflated growth nationwide in the Spring 2004....Weak U.S. dollar abroad continues to help attract more visitors to the U.S....Consumer confidence increased in all three months....Leading economic indicators holding steady and predictions are positive for the remainder of the year....Near record May rainfall in La. prevented some outdoor activities and hampered some attractions and festivals attendance.

Previous copies of the Louisiana Travel Pulse are available on the web at: www.latour.lsu.edu

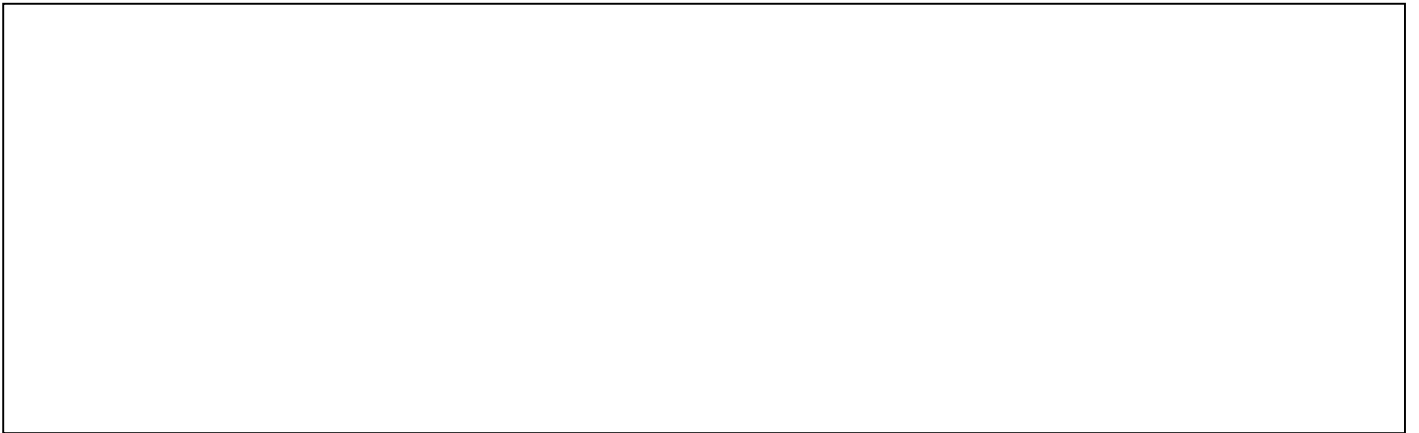
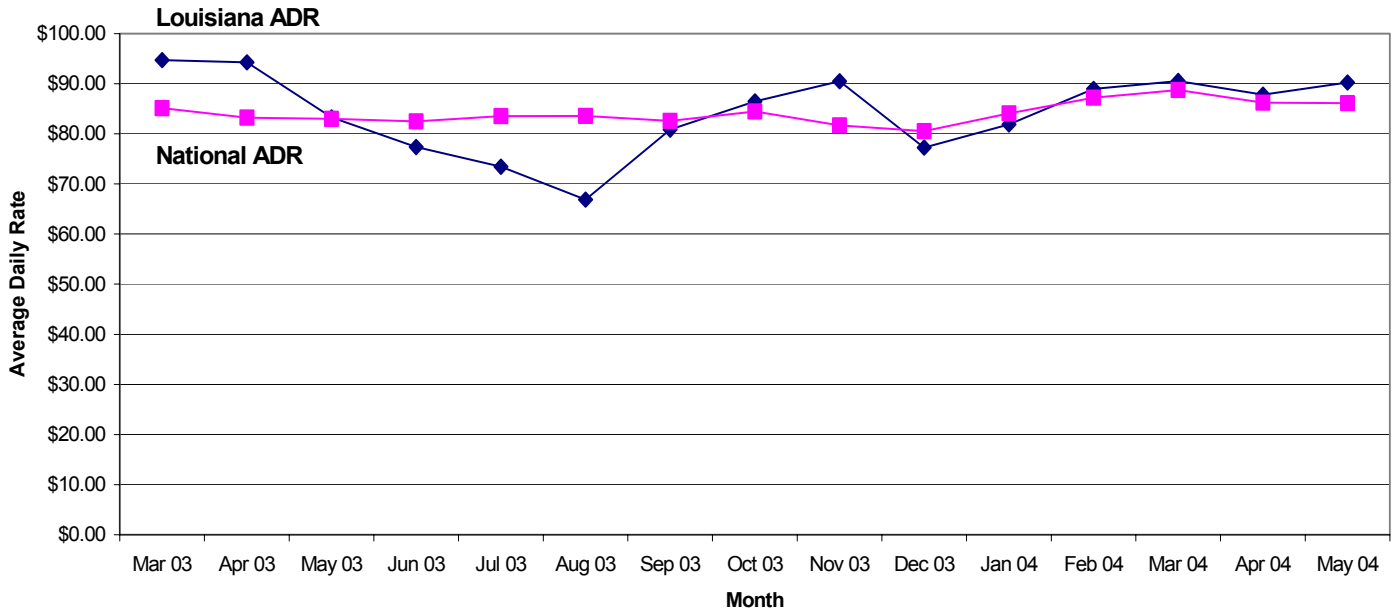
1. Hotel Trends – Occupancy Rate

Sprint 2004 – Occupancy Rate Trend



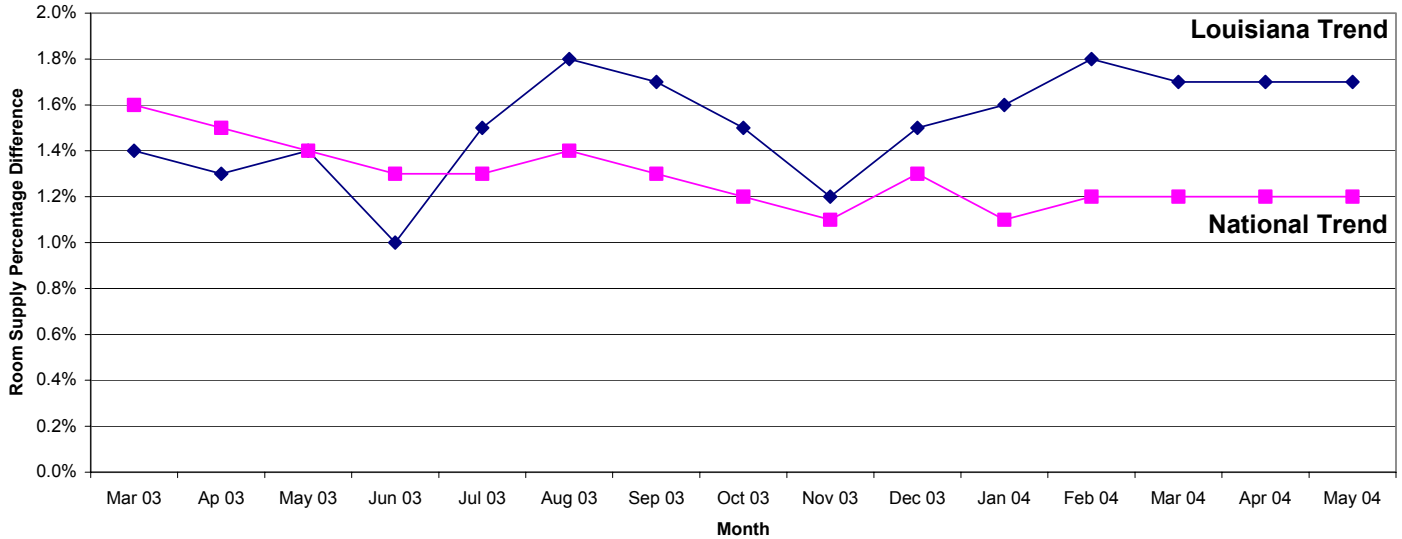
2. Hotel Trends – Average Daily Rate

Spring 2004 – Average Daily Rate Trend



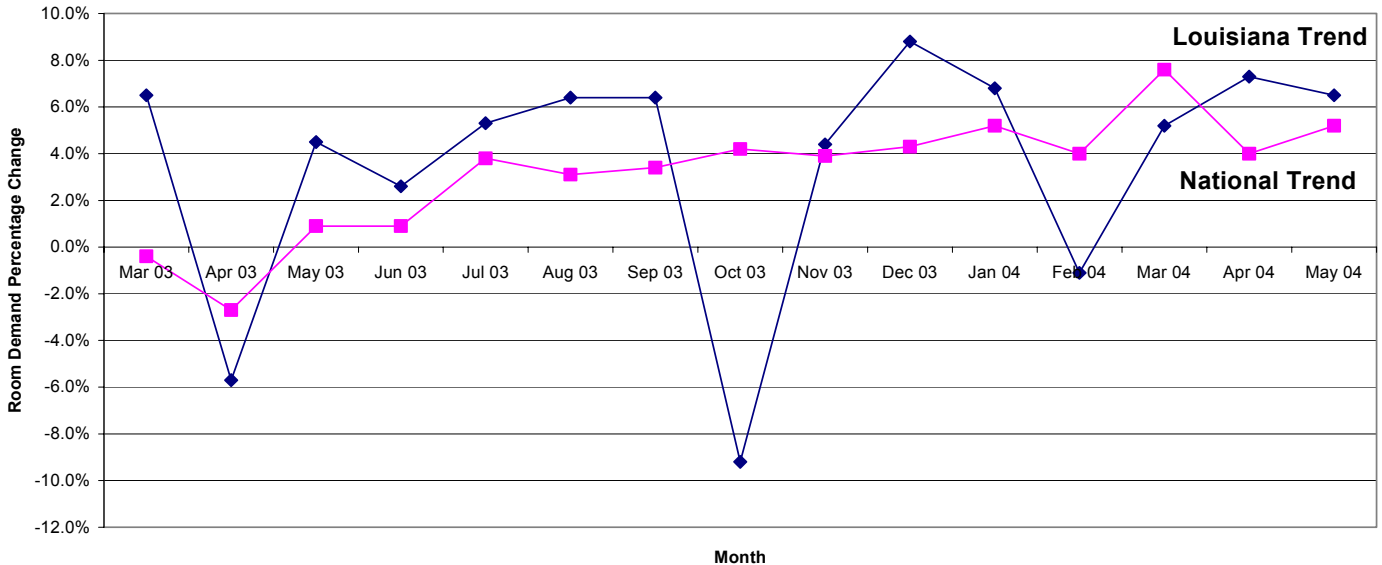
3. Hotel Trends – Room Supply

Spring 2004 – Room Supply Trend



4. Hotel Trends – Room Demand

Spring 2004 – Room Nights Sold Trend

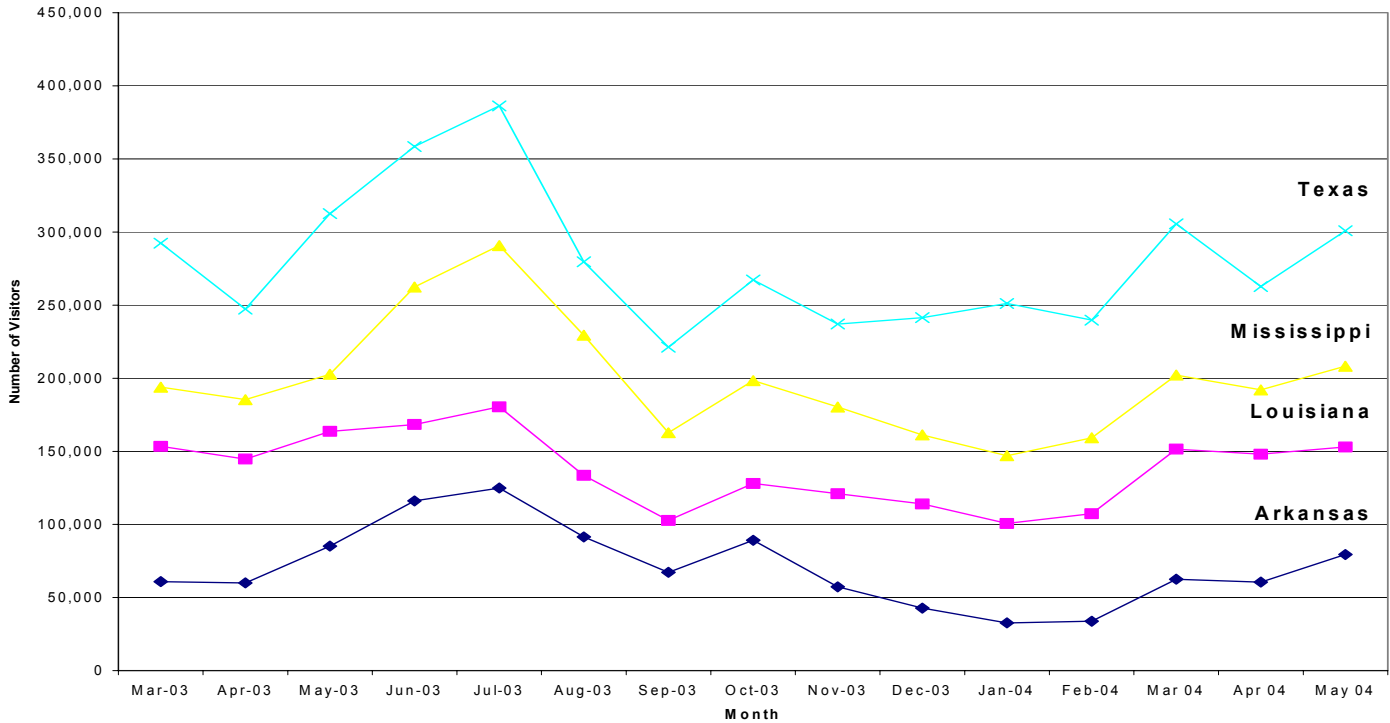


Number of hotel/motel properties in Louisiana – 715
Number of hotel/motel rooms in Louisiana – 77,341

Source: Smith Travel Research
 Louisiana Travel Pulse

5. State Information Center Visitors

Spring 2004 State Welcome Center Visitor Trend

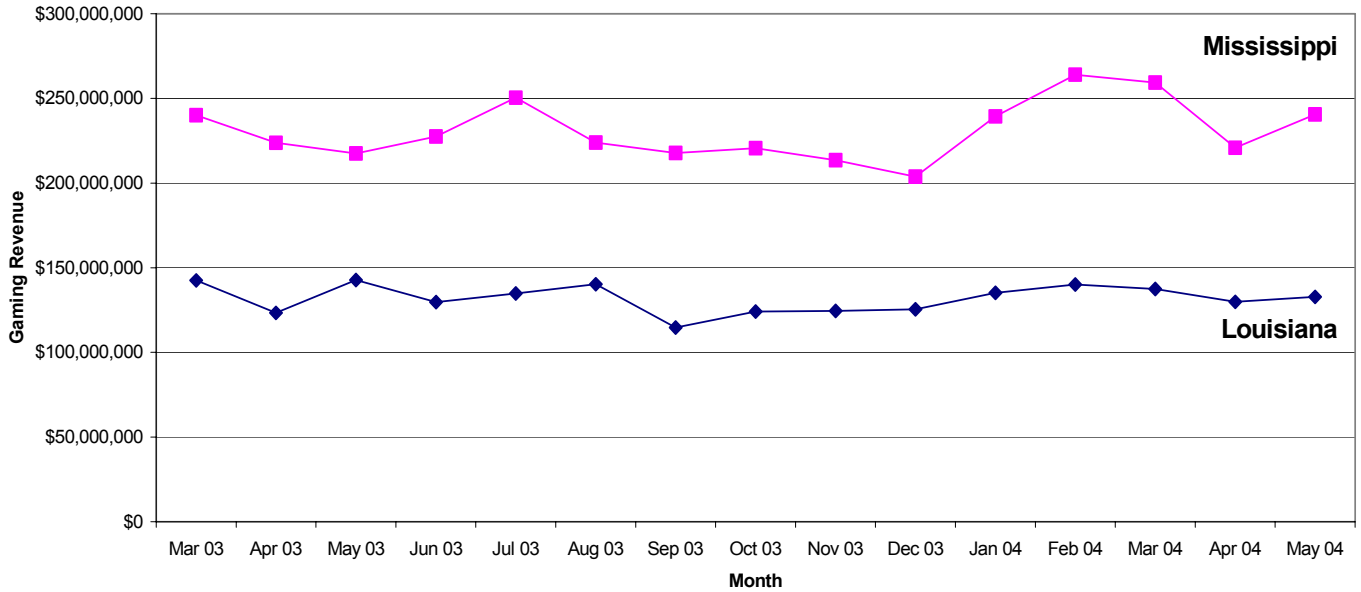


Travel Facts

- Louisiana's new I-10 Welcome Center located in the Atchafalaya was officially opened on June 18, 2004.
- Louisiana's 2 percent decline in visitors during the spring was primarily due to the closure of the Pearl River center for renovations and construction work on the open (but not fully functional) I-49 Welcome Center whose rest area is still undergoing changes.
- In cooperation with the Arkansas State Highway and Transportation Department, the Arkansas Department of Parks and Tourism is in the process of rebuilding several tourist information centers. Currently four are under construction -- Texarkana, El Dorado, Corning and Van Buren/Fort Smith. Construction of these centers should be complete by 2005. If funding becomes available, the next three centers identified for replacement are at Blytheville, Lake Village and West Memphis.

6. Riverboat Gaming

Spring 2004 – Gross Revenue Trend



	Louisiana	Mississippi
Spring 2004 Season		
Total Gross Revenue	\$400,131,902	\$719,486,521
% difference from prior year	-2.1%	+5.5%
% difference from 5 years ago	+13.4%	+10.7%

Sources: Louisiana State Police, and Mississippi State Tax Commission (<http://www.mstc.state.ms.us/index.html>)

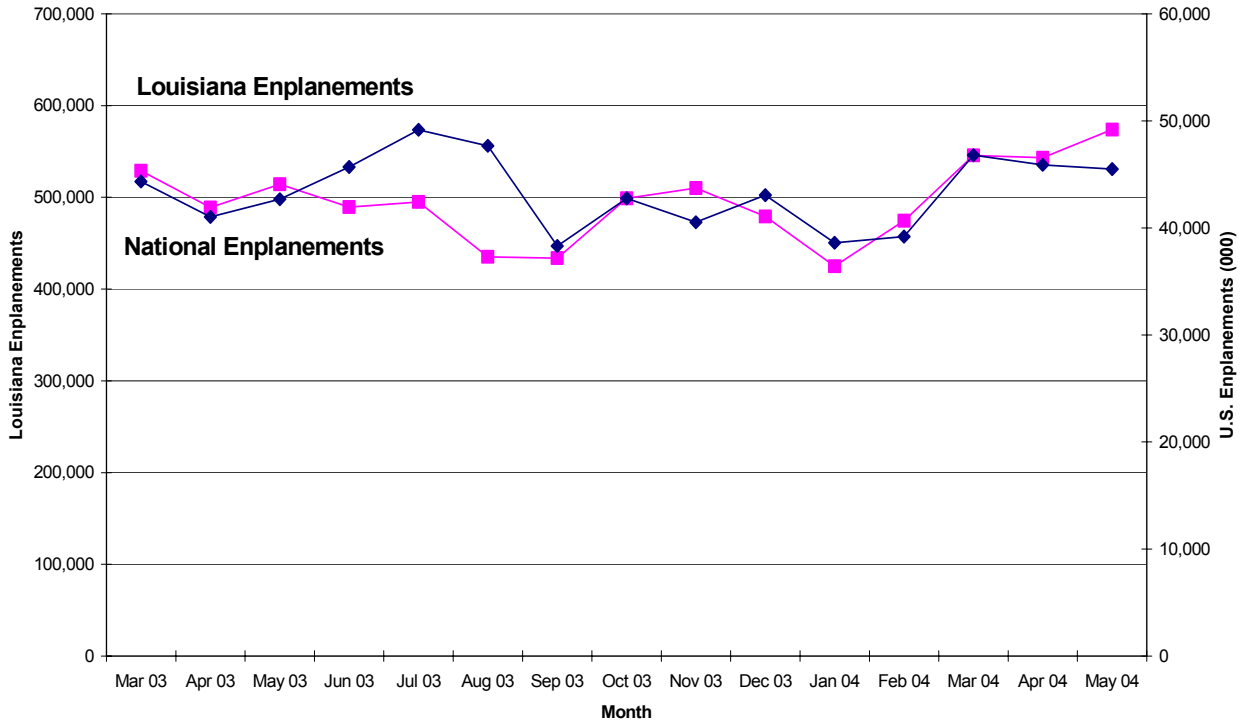
- The gross revenue for Louisiana’s land based casino in New Orleans for the Spring 2004 was over \$81,419,861, 13.8% greater than the same period the year before.
 - The total gross revenue for Louisiana’s riverboats, land-based casino, and racetrack slot machines for the Spring 2004 was \$515,156,821, 6.8% greater than the year before.
- Source: Louisiana Gaming Control Board (<http://www.dps.state.la.us/lgcb/welcome.html>)

“The nine riverboat casinos in Shreveport-Bossier City and Lake Charles accounted for 70 percent of the casino revenue in the state for the past three months, according to state reports. In the fall, the Shreveport market felt the outside competition from the Win Star Casino in tiny Thackerville, Okla., about an hour away from Dallas. It has thrived since opening in the summer as a bingo facility, the only kind of gambling allowed in Oklahoma. The electronic games at the WinStar casino are based on bingo, but like video poker lottery terminals, the experience is much like playing slots. The WinStar, which boasts more than 1,100 electronic games, is prohibited from having table games such as blackjack, roulette or poker.”

Source: *Laura Maggi, Times Picayune, April 13, 2004*

7. Airport Passenger Enplanements

Spring 2004 Enplanements Trend



Spring 2004 Season

Louisiana Airport Enplanements: 1,661,715

% difference from prior year: +2.6%

% difference from five years ago: +4.9 %

U.S. Airport Enplanements: 138.2 million

% difference from prior year: +7.9%

% difference from five years ago: -5.1%

2004 Performance (January-May)

Louisiana Airport Enplanements: 2,561,176

% difference from prior year: +3.8%

% difference from 5 years ago: +0.9%

U.S. Airport Enplanements: 216 million

% difference from prior year: +5.9%

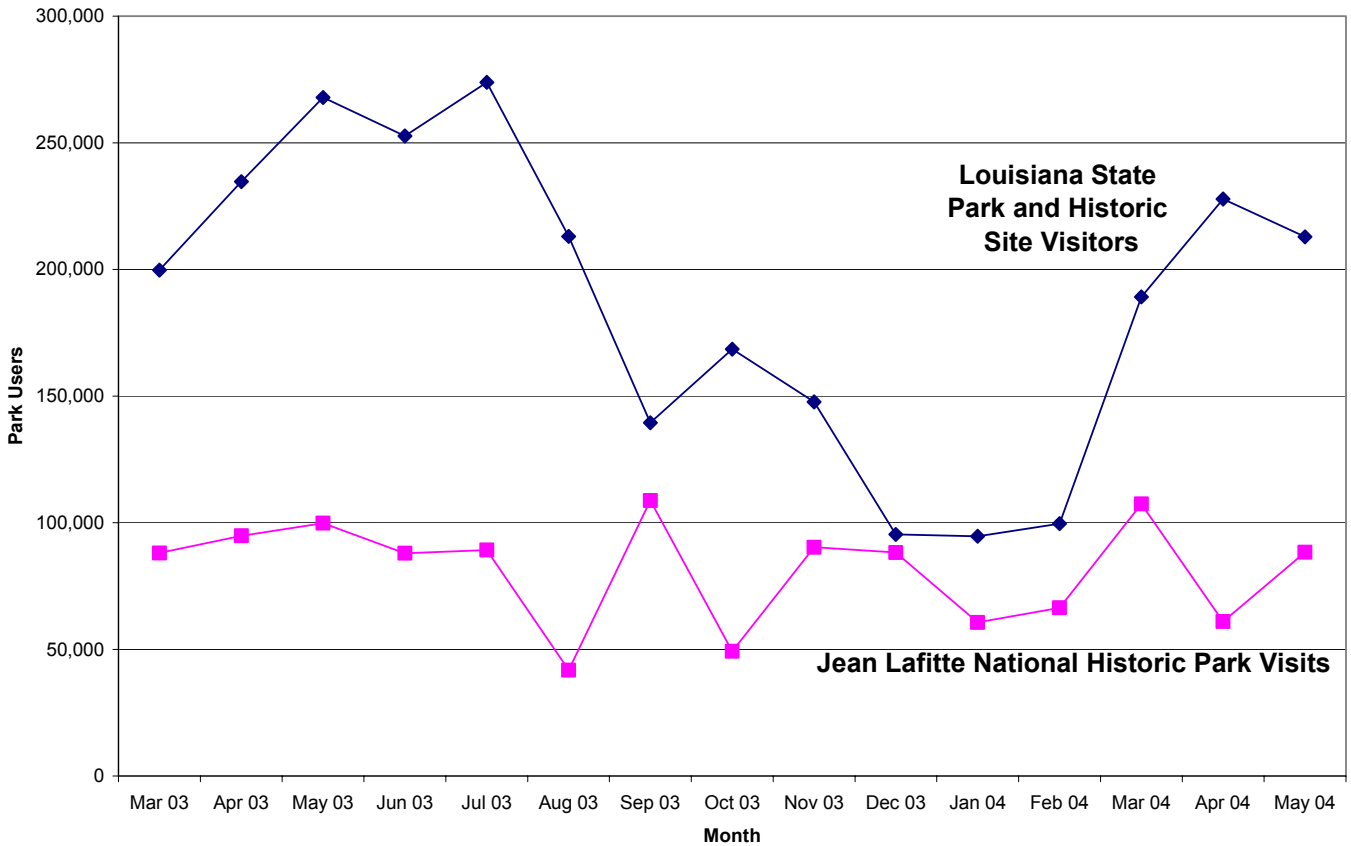
% difference from 5 years ago: -5.1%

Source: Louisiana Office of Tourism, and the Air Transport Association (<http://www.airlines.org/>)

As of April 2004, Louisiana's airports had direct non-stop flights to 63 cities. New Orleans had 41, all of which were domestic except for direct flights to Toronto, Canada and San Pedro Sula, Honduras. Shreveport had direct flights to 5 cities, including Cincinnati, Atlanta, Dallas/Ft. Worth, Houston, and Memphis. Baton Rouge, Lafayette, Alexandria, and Monroe had direct flights to Atlanta, Dallas, Houston, and Memphis. Lake Charles had direct flights to Houston.

8. State and National Park Visitors

Spring 2004 Park Visitors Trend



Spring 2004 Season

Louisiana State Parks and Historic Site Visitors: 629,751

% difference from prior year: -10.3%

Jean Lafitte National Historical Park Visits: 256,701

% difference from prior year: -9.1%

2004 Year-To-Date Performance (January-May)

Louisiana State Parks and Historic Site Visitors: 824,055

% difference from prior year: -9.5%

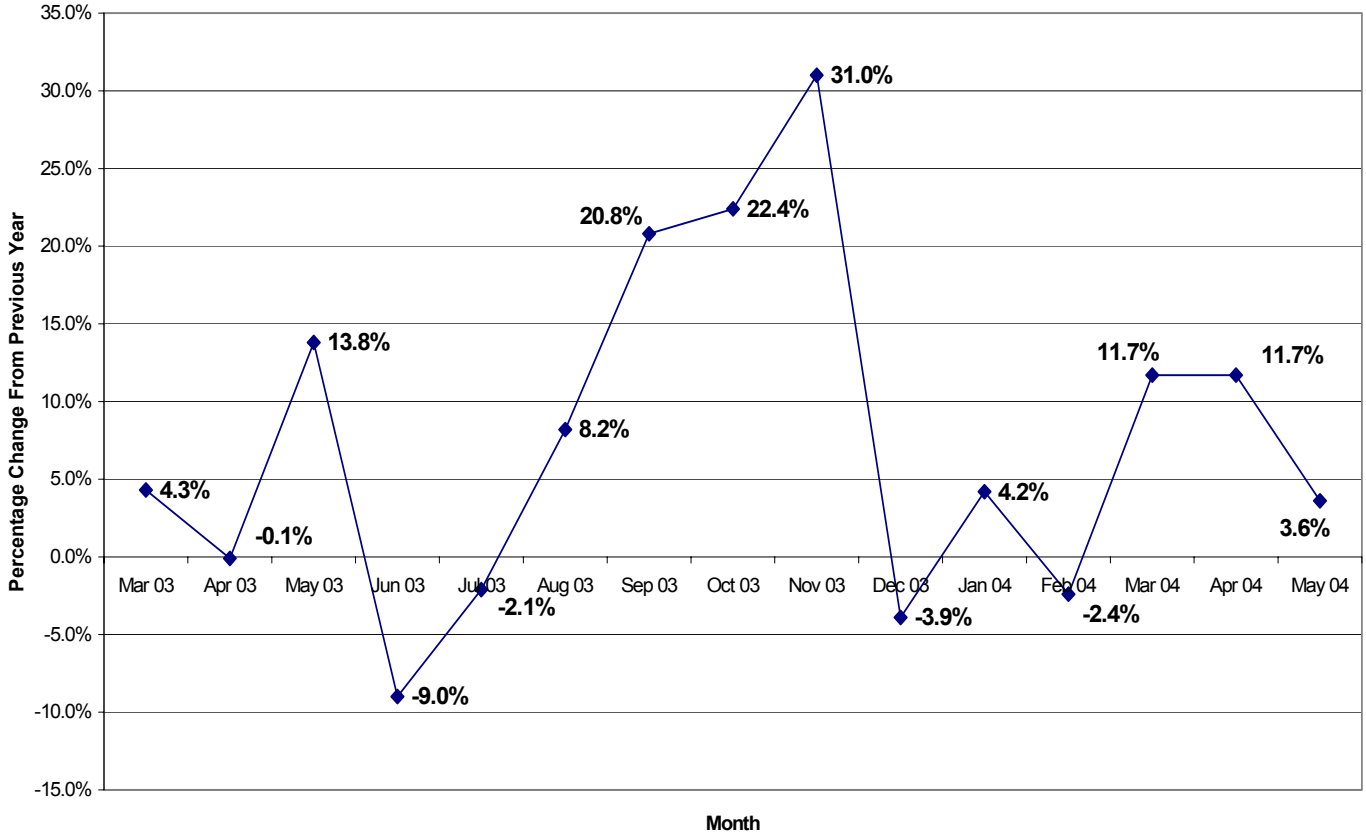
Jean Lafitte National Historical Park Visits: 383,730

% difference from prior year: -3.2%

Source: Louisiana Office of State Parks, and the U.S. National Park Service (<http://www2.nature.nps.gov/stats/>)

9. Local Tourist Information Centers

Spring 2004 – Tourist Center Visitor Trend



Spring 2004 Season

Louisiana local tourist information center visitors: 160,007

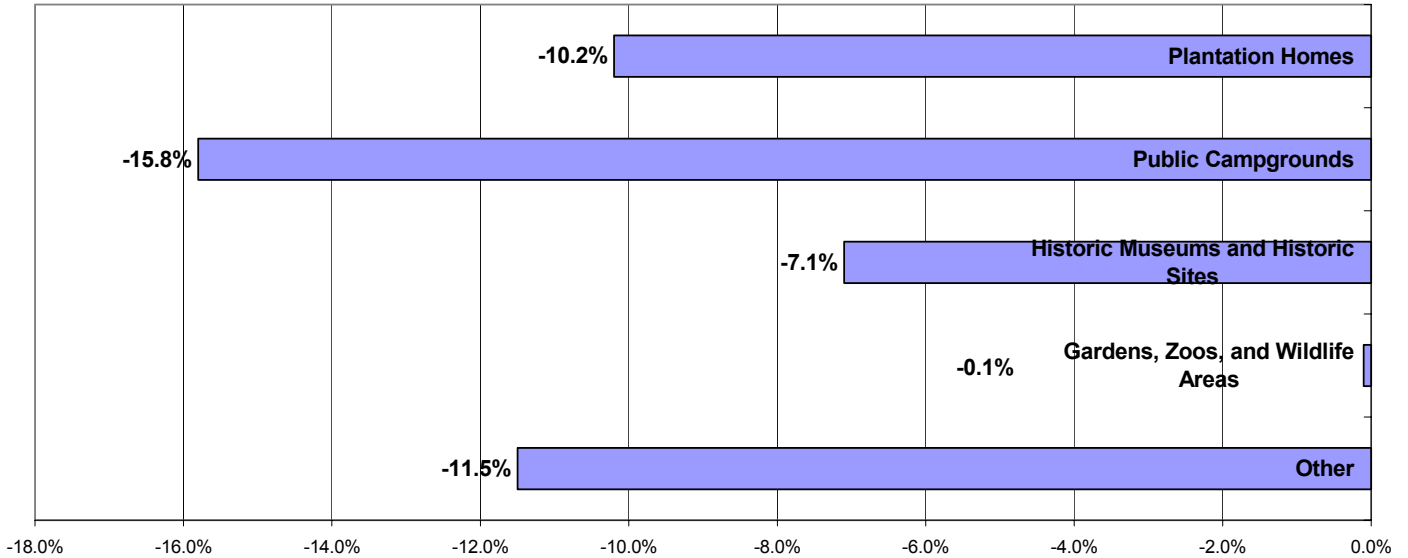
Percentage difference from prior year: +8.7%

During the Spring season, 10 information centers reported increased visitor volume and 13 information centers recorded a decrease in visitors compared to the previous Spring season.

Source: Louisiana Office of Tourism. Local information center visitors are operated by municipal and parish tourist bureaus throughout Louisiana. Most use registration sheets to record the volume of visitors who enter the centers for travel information.

10. Attractions Visitors

Spring 2004 - Visitor Trend By Category
Percentage Change From Previous Year In The Number Of Visitors



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	Spring 2004	Winter 2004	Fall 2003	Summer 2003	Spring 2003
Number of Sites w/increased attendance	33	40	55	29	34
Number of Sites w/decreased attendance	49	36	23	47	43
Percentage difference from previous year*	-7.4%	-8.6%	+11.4%	-5.4%	+3.8%

* Percentage difference in actual visitors recorded at all parks, museums, and attractions submitted to LOT.

10. Regional Trends - Spring

Greater New Orleans	2004	2003	% +/-
New Orleans International Airport			
Passenger Enplanements	1,372,443	1,263,530	+8.6%
New Orleans Hotel-Motel Occupancy Rate			
March	76.4%	76.5%	-0.1%
April	69.8%	67.5%	+3.4%
May	72.0%	66.3%	+8.6%
New Orleans Visitor Center	45,439	37,709	+20.5%
Slidell Visitor Center	111,663	109,570	+1.9%
Kentwood Visitor Center	37,320	37,846	-1.4%
Pearl River Center	(Note: In July 2003 the Pearl River Center closed indefinitely for renovations.)		
Parks, Attractions, Museums	763,795	861,075	-11.3%

Plantation Country	2004	2003	% +/-
Baton Rouge Metro Airport			
Passenger Enplanements	97,183	96,032	+1.2%
Baton Rouge Hotel/Motel Occupancy Rate			
March	70.2%	66.1%	+6.2%
April	63.8%	63.4%	+0.7%
May	64.7%	63.1%	+2.5%
State Capitol Visitor Center	61,002	61,583	-0.9%
St. Francisville Visitor Center	11,190	10,257	+9.1%
Parks, Attractions, & Museums	287,441	288,970	-0.5%

Cajun Country	2004	2003	% +/-
Lafayette Regional Airport			
Passenger Enplanements	42,565	39,503	+7.8%
Lake Charles Regional Airport			
Passenger Enplanements	11,072	10,215	+8.4%

Lafayette Hotel-Motel Occupancy Rate			
March	74.7%	72.4%	+3.2%
April	68.0%	67.5%	+0.7%
May	59.8%	63.7%	-6.1%

Lake Charles Hotel-Motel Occupancy Rate			
March	65.3%	61.5%	+6.2%
April	60.2%	58.3%	+3.3%
May	58.4%	63.5%	-8.0%

Vinton Visitor Center.....	57,135	48,225	+18.5%
Parks, Attractions, & Museums	268,654	294,508	-8.8%

Crossroads	2004	2003	%+/-
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England International Airport			
Passenger Enplanements.....	29,102	23,703	+22.8%

Alexandria Hotel-Motel Occupancy Rate			
March	68.4%	54.9%	+24.6%
April	65.8%	53.7%	22.5%
May	54.5%	53.2%	+2.4%

Vidalia Visitor Center.....	8,136	6,412	+26.9%
Parks, Attractions, & Museums	86,075	88,661	-2.9%

Sportsman's Paradise	2004	2003	%+/-
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Shreveport Regional Airport			
Passenger Enplanements.....	80,994	75,685	+7.0%

Monroe Regional Airport			
Passenger Enplanements.....	28,356	23,404	+21.2%

Shreveport Hotel-Motel Occupancy Rate			
March	70.9%	66.2%	+7.1%
April	67.3%	59.2%	+13.7%
May	68.3%	65.8%	+3.8%

Monroe Hotel-Motel Occupancy Rate			
March	65.1%	60.8%	+7.1%
April	60.5%	56.7%	+6.7%
May	62.1%	64.1%	-3.1%

Greenwood Visitor Center	59,286	56,767	+4.4%
Mound Visitor Center	53,859	50,320	+7.0%

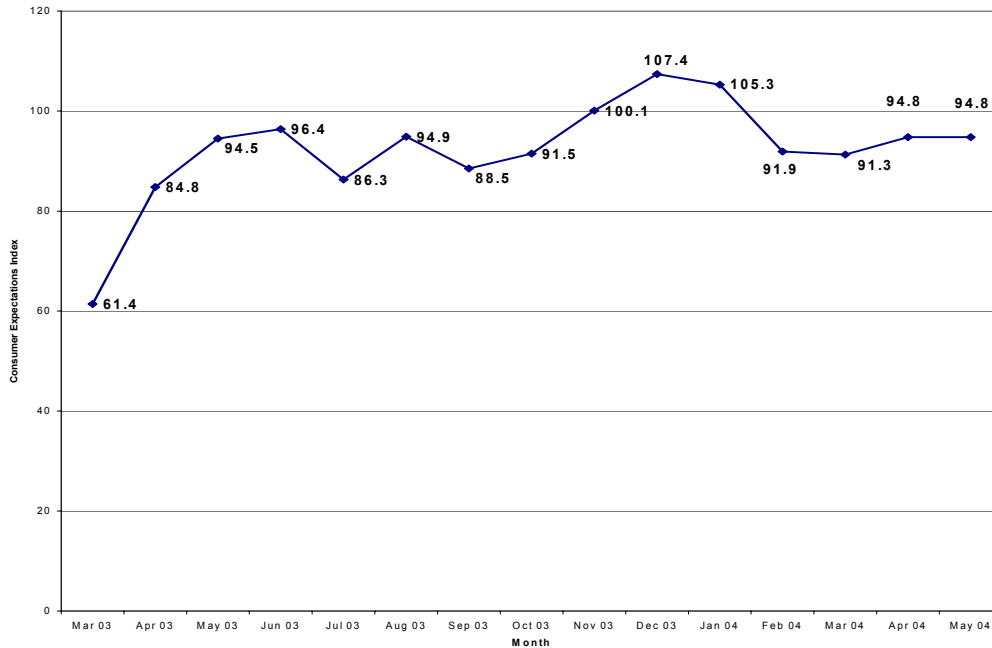
Parks, Attractions, and Museums.....	182,329.....	181,662.....	+0.4%
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Notes on Regional Trends: Hotel/Motel statistics are from Smith Travel Research, Inc.; all other figures are from the Office of Tourism. Park figures include both day-use and overnight visitors. Attendance at parks, attraction and museums are self-reported to the Office of Tourism and include many different methods of recording visitors/customers.

11. Looking Ahead

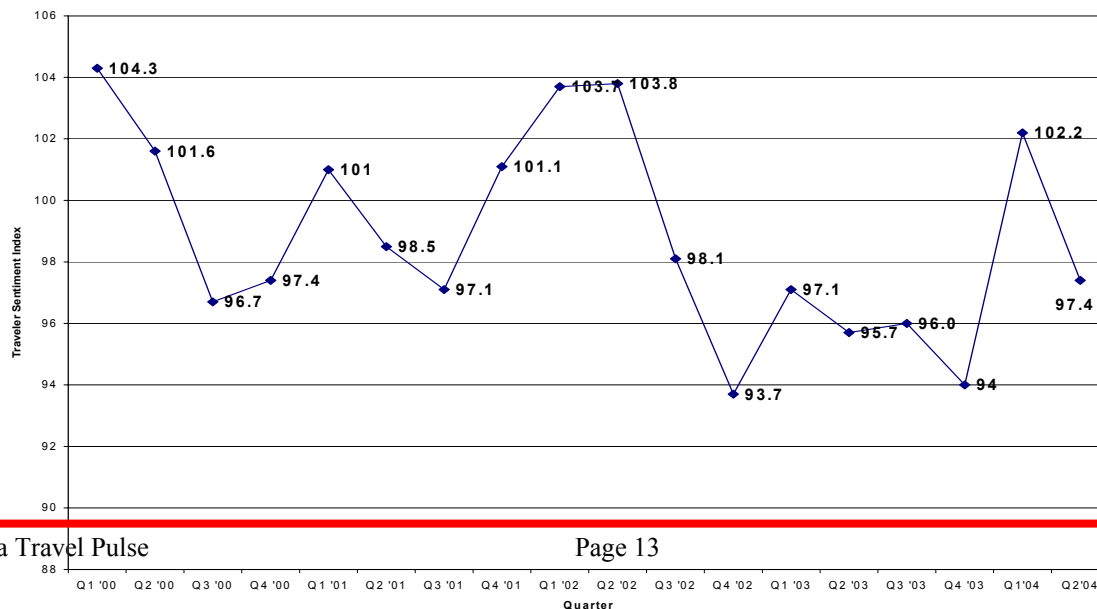
This section provides U.S. and Louisiana leading indicators which have predictive value for future tourism trends. They are called “leading” because their direction or magnitude historically “leads” the focus of our industry.

A. U.S. Consumer Expectations Index Trend*



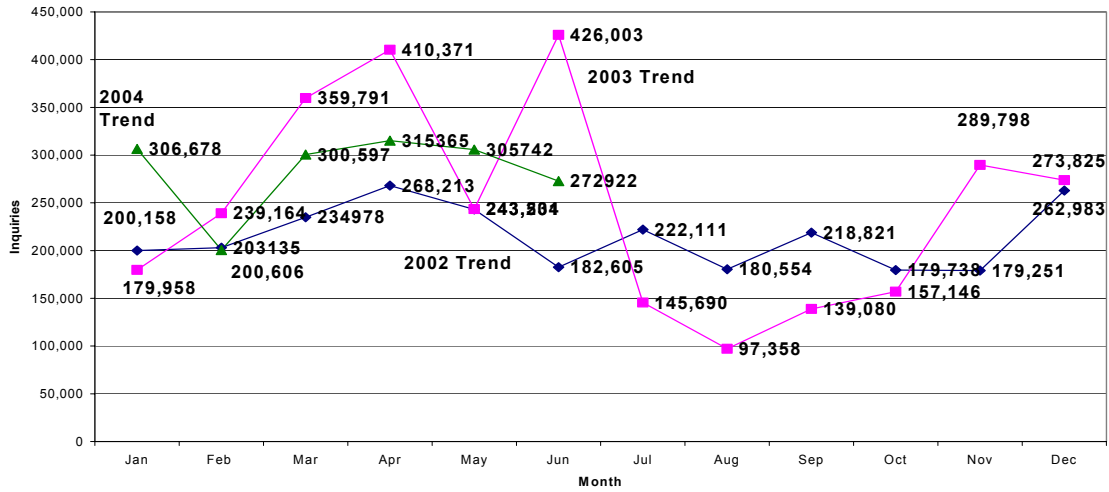
*Note: The Consumer Expectations Index is a part of the Consumer Confidence Survey developed by The Conference Board. This index is a monthly measure of the public's confidence in the health of the U.S. economy. Industries that rely on the Survey for forecasting include manufacturers, retailers, banks, the Federal Reserve, and United States government agencies.

B. U.S. Traveler Sentiment Index Trend*



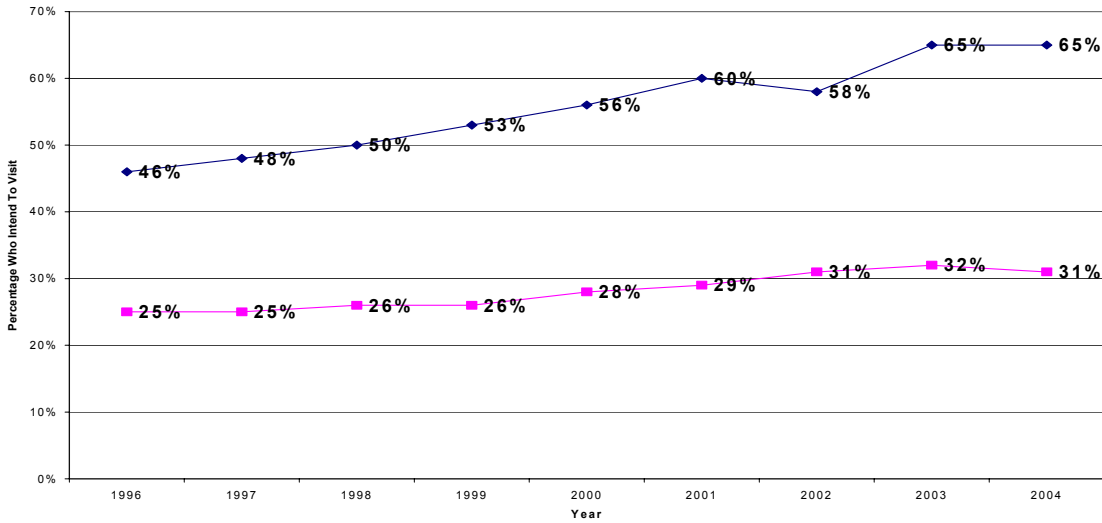
*Note: The Traveler Sentiment Index is conducted quarterly by the Travel Industry Association of America (TIA), and is based on responses of 1000 interviews with U.S. adults who have taken at least one trip in the past year. TIA began the Traveler Sentiment Index study in first quarter 2000 (January), which serves as the baseline period. In general, the Traveler Sentiment Index measures consumer interest in pleasure travel and their perceived ability to take pleasure trips.

C. Louisiana Office of Tourism Inquiry Trend*



*Note: These monthly figures reflect the number of mail, telephone, e-mail and internet requests for the Louisiana Tour Guide. These figures also reflect the number of visits received by the Office of Tourism's website (louisianatravel.com) which contains all of the same information in the printed edition of the Tour Guide.

D. Likely to Visit Louisiana*



*Note: For the past 14 years, The Marketing Workshop, Inc. has conducted an annual advertising awareness survey for the Louisiana Office of Tourism. The survey is conducted by telephone in May at the conclusion of the Spring ad campaign. One of the items the survey measures is the likelihood of visiting Louisiana over the next 24 months. The above graph shows the trend since 1996. The direction of the trend is the primary measurement tool here, and it provides an indication of interest to travel to Louisiana in the future.