2000 TravelScope[®] Profile of U.S. Travelers to Louisiana

Prepared by The Research Department of the Travel Industry Association of America Washington, D.C.



Travel Industry Association of America

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The 2000 TravelScope[®] Profile of U.S. Travelers to Louisiana was prepared by:

Kevin Wang Marketing Research Analyst

Mary Jo Torrey Manager, Cooperative Research

Andrea M. Stueve Director, Marketing Research

Dr. Suzanne D. Cook Senior Vice President - Research



1100 New York Avenue NW Suite 450 Washington, D.C. 20005-3934 www.tia.org

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INTRODUCTION

The Louisiana travel profile has been conducted to better understand the travel market to Louisiana. The Louisiana Office of Tourism commissioned the research department of the Travel Industry Association of America, to estimate the volume and travel characteristics of U.S. visitors to Louisiana for 2000. The study has been conducted since 1986-1987 time period.

Purpose

The objectives of this study are to determine:

- the number of visitors to the states,
- the characteristics of trips taken,
- a profile of Louisiana visitors.

Source

Domestic travel information presented in this report is captured via TravelScope[®], a national consumer survey conducted monthly, using National Family Opinion's (NFO) consumer panel of U.S. households. TravelScope is a cooperative research effort, funded by states, cities and other participants and managed by the research department of the Travel Industry Association. Since 1994, TravelScope has collected visitor volume, market share, trip characteristics, and demographics for all U.S. resident travel. For more information on TravelScope, please see the Methodology section of this report.

Definitions

Domestic travel is measured in terms of household trips and person-trips. Respondents are instructed to not include trips commuting to/from work or school or trips taken as a flight attendant or vehicle operator. National figures in this report are based on total domestic travel (originating in the 48 contiguous states and traveling to any of the 50 states). 1999 figures have been revised from previous reports due to changes in sample balancing procedures.

The term "household trips" counts trips taken by U.S. households traveling 50 miles or more, oneway, away from home or including one or more overnights spent at the destination. "Household trips" are used in this report to measure travel party size, children on trip, trip spending and demographic data.

The term "person-trips" counts trips and people per trip. For example, when a family of four takes a trip, this equals one "household trip" and four "person-trips." "Person-trips" are used in this report to measure trip characteristics and state of origin and destination.

Appendix A consists of the survey methodology. Appendix B contains the survey questionnaire. Appendix C consists of a Glossary of Terms. Appendix D presents the Brand Development index of the top 50 origin cities for Louisiana.

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EXECUTIVE SUMMARY

Louisiana growth in visitor volume has been stronger than the U.S. average for the past three years. Visitor volume as measured in domestic person-trips increased 11.6% in 2000. This involved a somewhat larger increase in pleasure travel (+16%) than business travel volume (+11%). This increase in travel volume is far larger than the U.S. average of 2%.

- Since 1994, Louisiana visitor volume has grown 29% compared to 6% in U.S. domestic volume growth during that same timeframe.
- Pleasure volume grew from 13.3 million person-trips to 15.4 million person-trips in 2000 while business volume increase slightly from 4.6 million to 5.1 million. In the U.S. as a whole, business volumes decreased by 2.5% during the same timeframe while pleasure volume went up 1.4%.
- Total visitor nights in Louisiana increased by 1.2 million, or 2.6%, since 1999.
- Texas remains the dominant origin market for Louisiana, providing 32% of total visitor volume. Louisiana resident travelers continue to make up a quarter (25%) of Louisiana persontrips.
- Louisiana is a strong pleasure market with a high proportion of entertainment travelers compared to the national average (24% in Louisiana vs. 16% in the U.S. as a whole). Mississippi, Tennessee, and Florida are also high entertainment states (21%-24%).
- The primary transportation mode continues to be personal cars/trucks (77%). Louisiana visitors are consistent with the U.S. as a whole in this regard. The competitive states of Mississippi, Alabama and Tennessee are more predominant auto markets with 84%-86% primary auto use.
- Trip duration for non-resident overnight visitors has decreased since 1999 (3.1 nights in 2000 vs. 3.7 nights in 1999.) Yet among all Louisiana trips, overnight trips increased from 69% in 1999 to 73% in 2000, which indicates that shorter trips are increasing among travelers to Louisiana.
- Shopping is Louisiana non-resident visitors' favorite activity (24%) as with U.S. travelers overall (33%). Gambling is the second most popular activity (24%), significantly more so in Louisiana than in the U.S. overall (8%). Nightlife/dancing is also much more popular in Louisiana (11%) than it is nationwide (7%).

See next page for profile summaries of Louisiana visitors: Louisiana compared to the average U.S. traveler Louisiana business/convention visitors Louisiana pleasure visitors 2

Profiles

Compared to U.S. travelers in general, non-resident Louisiana visitors are:

- More likely to be traveling for entertainment purposes (26% vs. 16% U.S.).
- Less likely to travel for purposes of outdoor recreation (2% vs. 10% U.S.).
- Travel more by air (23% vs. 18% U.S.) and less by auto (67% vs. 74% U.S.).
- More likely to stay in a hotel, motel or b&b (67% vs. 52% U.S.).
- More likely to be on a day trip (27% vs. 16 U.S.).
- Three times more likely to participate in gambling (24% vs. 8%).
- More likely to go out for nightlife/dancing (11% vs. 7% U.S.).
- Less likely to participate in outdoor activities (6% vs. 17% U.S.).
- Spending more (average trip spending \$471 vs. \$457 in the U.S. as a whole).
- Less likely to be young parents (12% vs. 15% U.S.).

Compared to Louisiana visitors overall, Louisiana business/convention travelers are:

- More likely to fly (40% vs. 17% overall), less likely to drive (49% vs. 73% overall).
- More likely to rent a car as a secondary form of transportation (11% vs. 4%).
- Staying longer (average stay of 2.8 nights vs. 2.1).
- More likely to stay in hotel, motel or b&b (72% vs. 46%).
- Spending more (average trip spending \$614 vs. \$400).
- More likely to come from the East North Central (7% vs. 4%) or South Atlantic (17% vs. 10%) regions.
- Generally traveling alone or with other people not from their household (average number of household members on trip 1.3 vs. 2.0).
- Less likely to have children along on the trip (5% of trips include children vs. 20%), though when they do bring their children they bring on average the same number of children as travelers in general (1.8 vs. 1.9 children).
- Younger (average age 43 vs. 45), from households with higher average annual incomes (72.3K vs. 56.8K) and more likely to be college graduates (69% college degree/post graduate vs. 52%).

Compared to Louisiana visitors overall, Louisiana pleasure travelers are:

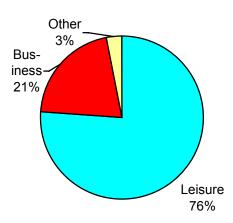
- More likely to travel by car (81% vs. 77% overall), less by air (11% vs. 17% overall).
- More likely to stay in a private home (39% vs. 30%) and less in hotel/motel/b&bs (53% vs. 63%).
- Spending less per trip (average trip spending \$321 vs. \$400).
- More likely to come from Alabama (6% vs. 4%) or Texas (35% vs. 32%).
- Traveling with more household members (63% with 2 or more household members vs. 53%) and more likely to travel with children (27% vs. 20%).
- More likely to be retired (19% vs. 16%).

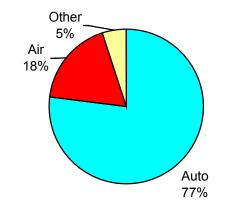
2000 SUMMARY OF DOMESTIC TRAVEL IN THE U.S.

An estimated 997.6 million person-trips were taken domestically by U.S. Residents in 2000

2000 Primary Purpose of Trip



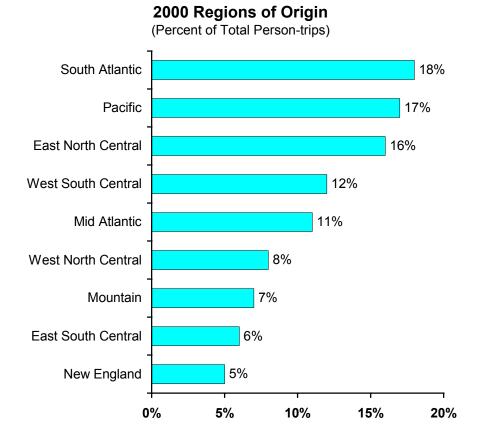




- The average household party size was 2.0 persons.
- 22% of trips included children.
- 3% of travelers were on a group tour.
- The average trip duration was 3.4 nights. The average overnight trip duration was 4.1 nights.
 - 52% of overnight U.S. travelers lodged in a hotel, motel or B&B.
 - 40% of overnight U.S. travelers lodged in a private home.
- The average expenditure per trip was \$457.
- The most popular trip activities were:
 - Shopping (33%)
 - Outdoor (17%)
 - Historical Places/Museums (14%)
 - Beaches (10%)
 - National/State parks (10%)
 - Cultural Events/Festivals (10%)
 - Additional activities include Theme/Amusement Park (8%), Gambling (7%), Nightlife/Dancing (7%) and Sports event (6%).

Census Region of Origin

In 2000, most of the U.S. domestic travel volume (51%) initiated from the South Atlantic, Pacific and East North Central regions. According to the U.S. Census, these are also the most populous regions of the U.S.



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VISITOR VOLUMES

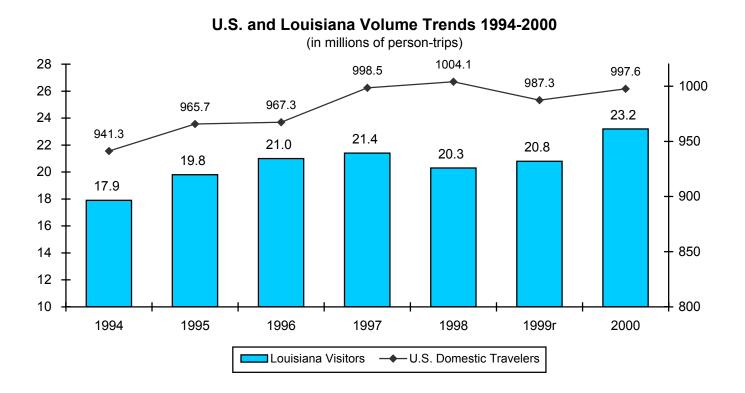
	No. of Visitors (in person-trips)	Percent of Trip Duration <u>Spent in Louisiana</u>
Total U.S.	997,567,000	not applicable
Total Louisiana	23,154,000	60%
Non-resident visitors	17,427,000	56%
Non-resident African-American visitors	1,865,000	54%
Resident travelers	5,727,000	82%
Louisiana Cities*		
New Orleans Resident Non-resident	2,005,300 9,014,526	67%
Shreveport Resident Non-resident	299,416 2,842,514	69%
Baton Rouge Resident Non-resident	1,208,938 1,606,376	67%
Lafayette Resident Non-resident	586,316 1,077,036	59%
Lake Charles Resident Non-resident	291,658 1,066,358	69%
Monroe** Resident Non-resident	202,530 451,625	66%
Alexandria** Resident Non-resident	404,818 256,170	74%

* See Appendix E for an explanation of city volume calculations.

** Information for Alexandria and Monroe are based on small sample sizes. Caution is recommended when using this information for strategic decisions.

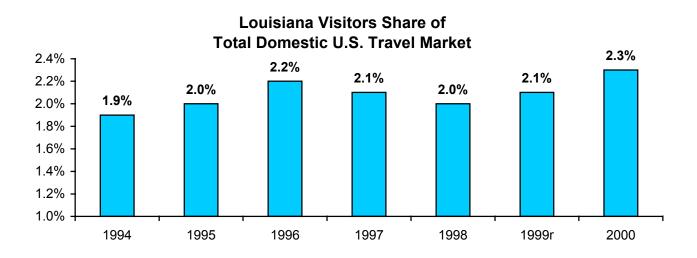
Visitor Volume 1994-2000

Louisiana growth in visitor volume has been stronger than the U.S. average for the past three years. The state of Louisiana hosted 23.2 million domestic visitors in 2000, an increase of 11.6% over 1999 figures. This continues the rise in volumes seen since 1998, and exceeds the previous high of 21.4 million visitors in 1997. It is the largest single year increase seen in this study.



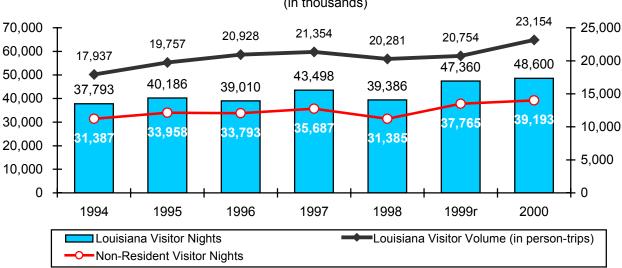
Market Share

Louisiana has a 2.3% share of the overall U.S. domestic travel volume. The large volume increase in 2000 drove this market share up slightly (up 0.2 points).



Visitor Nights

Of Louisiana's visitors, 70%, or 16.1 million, spent at least one night in the state. The average stay for an overnight visitor was just about 3 nights. This translates into 48.6 million visitor nights in 2000, an increase of 2.6% (or 1.2 million visitor nights) since 1999. Eighty-one percent of visitor nights were by non-resident visitors. Visitor nights generally trend with volume but may have more or less change due to differences in average trip lengths from year to year. For example, while volume increased by 11.6% in 2000, total visitor nights increased at a slower rate (2.6%) due to shorter average stays (2.1 in 2000 versus 2.3 in 1999).



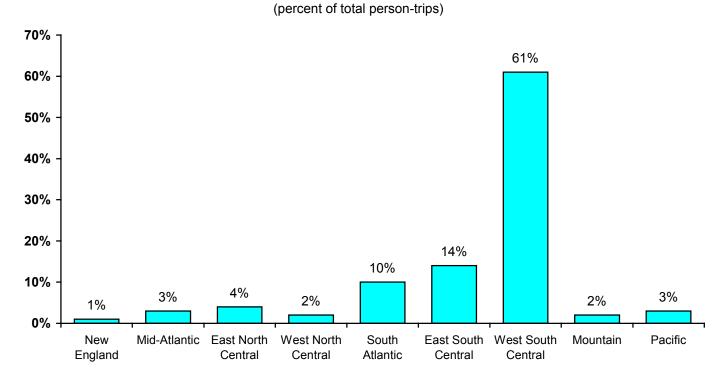
Louisiana Visitor Volume and Visitor NightsTrends 1994-2000

a Visitor Volume and Visitor NightsTrenc (in thousands)

VISITOR ORIGIN

Region of Origin

Over half of Louisiana visitors (61%) come from the West South Central region which is comprised of Louisiana, Arkansas, Oklahoma and Texas. The South Atlantic and East South Central regions also contribute significant visitor volumes providing a total of 24% of Louisiana visitors. No other census region accounts for visitor volumes greater than 4%.

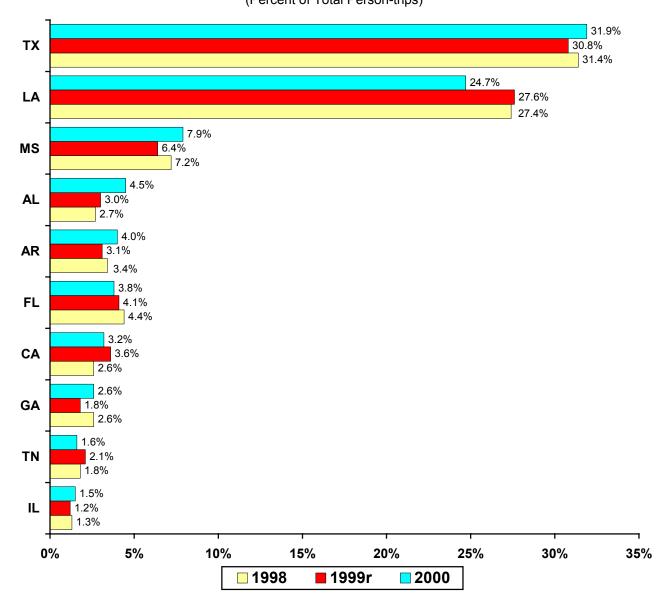


2000 Louisiana Visitors Region of Origin

State of Origin

Texas and Mississippi provided almost 40% of the total visitors to Louisiana in 2000, with Texas continuing to provide almost a third of all visitors. Resident travelers continue to make up a significant portion of Louisiana travel (25%) but this declined significantly in 2000 while nearby states like Mississippi, Alabama and Arkansas increased in volume of visitors to Louisiana. There appears to be a pattern of slight decline occurring in Florida over the past three years.

Business/convention travelers are more likely than pleasure travelers to come from Georgia. Pleasure travelers are more likely than business/convention travelers to come from Texas and Alabama.



Top Ten States of Origin (Percent of Total Person-trips)

Top DMAs of Origin

Houston and Dallas–Fort Worth remain the top advertising markets for Louisiana, providing the highest percent of both business and pleasure travelers with overall volumes of 11% and 9%, respectively. New Orleans and Baton Rouge generate the majority of resident travel volume at 7% and 6% respectively.

Several cities within Louisiana fall into the middle tier of advertising markets, providing 3-4% of volume each. Mobile-Pensacola is primarily a pleasure market with 95% of visitors from there traveling for pleasure purposes. The other middle-tier cities (Baton Rouge, Monroe and Tyler, are more evenly split between pleasure and business travelers.

Resident visitors (traveling 50 miles or more one way, from home, or overnight, and not commuting) provide substantial amount (25%) of travel volume within Louisiana. Four out of top six DMAs are within Louisiana.

		-		Business /
	<u>Total LA</u>	Non-resident	Pleasure	Convention
	Volume Share	Volume Share	Volume Share	Volume Share
Houston	2,463,000, 11%	2,463,000, 14%	1,670,000, 11%	343,000, 9%
Dallas – Fort Worth	2,110,000, 9%	2,110,000, 12%	1,609,000, 11 %	223,000, 6%
New Orleans	1,679,000, 7%	-	1,136,000, 7%	335,000, 8 %
Lafayette, LA	1,280,000, 6%	-	971,000, 6%	131,000, 3%
Baton Rouge, LA	918,000, 4%	-	447,000, 3%	150,000, 4%
Monroe – El Dorado, LA	864,000, 4%	-	486,000, 3 %	118,000, 3%
Mobile – Pensacola	706,000, 3%	706,000, 4%	669,000, 4%	**
Tyler – Longview, TX	640,000, 3%	640,000, 4%	484,000, 3%	115,000, 3%
Jackson, MS	626,000, 3%	626,000, 4%	442,000, 3%	101,000, 3%
Beaumont – Port Arthur, TX	598,000, 3%	598,000, 3%	485,000, 3%	82,000, 2%
Shreveport, LA	558,000, 2%	-	350,000, 2%	66,000, 2%
San Antonio	547,000, 2%	547,000, 3%	408,000, 3 %	88,000, 2%
Little Rock – Pine Bluff	496,000, 2%	496,000, 3%	283,000, 2%	129,000, 3%
Biloxi-Gulfport	486,000, 2%	486,000, 3%	347,000, 2%	**
Atlanta	476,000, 2%	476,000, 3%	224,000, 2%	165,000, 4%
Alexandria, LA	465,000, 2%	-	337,000, 2%	50,000, 1%
Los Angeles	370,000, 2%	370,000, 2%	306,000, 2%	43,000, 1%
Lake Charles	359,000, 2%		249,000, 2%	94,000, 2%
Columbus-Tupelo-West Point	271,000, 1%	271,000, 2%	**	152,000, 4%
New York	268,000, 1%	268,000, 2%	**	82,000, 2%

Top Advertising Markets of Origin for 2000 Louisiana Visitors

Note: Advertising markets defined by Nielsen's Designated Market Area (DMA)

** Less than 1%

DMA/BDI index*

In 2000, Biloxi-Gulfport residents had the highest propensity to travel to Louisiana, followed by Beaumont/Port Arthur and Tyler-Longview.

BDI Index for

out-of-state Louisiana Markets			
City (DMA) of origin	INDEX		
Biloxi-Gulfport	1651		
Beaumont-Port Arthur	1577		
Tyler-Longview	1187		
Jackson, MS	863		
Hattiesburg-Laurel	709		
Columbus-Tupelo-West Point	674		
Meridian	669		
Mobile-Pensacola	656		
Houston	602		
Abilene-Sweetwater	554		
Greenwood-Greenville	499		
Dallas-Ft. Worth	457		
Little Rock-Pine Bluff	454		
Jackson, TN	414		

See Appendix D for a list of the Brand Development Indexes for the top 50 origin cities to Louisiana.

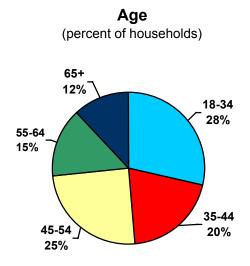
^{*} The Brand Development Index (BDI) is calculated by dividing the percentage of visitors Louisiana receives from that Designated Marketing Area (DMA) by the DMA's population. It gives an indication of the propensity for travel to Louisiana that is relative to the population size. DMA population figures are based on U.S. census projected population figures for 2000.

VISITOR DEMOGRAPHICS (Non-Resident Visitors)

The demographic characteristics of non-resident visitors to Louisiana are examined in this section. Demographic information is based on the head of the traveling household. Someone other than the head of household may have also been in the travel party. See page 22 for a summary chart of demographic variables.

<u>Age</u>

The average age of Louisiana visitors is 46. Almost a third of visitors (28%) are between 18 and 34 years old. One in five (20%) are between 35 and 44 years old. One in four (25%) are 45 to 54 years old and another 27% are 55 or older.



Household Size

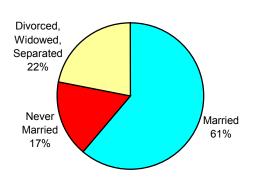
The average household size of Louisiana visitors is 2.6 members. Louisiana visitors are predominantly from households with one or two members (23% one member, 36% two member). The other 41% of households are almost evenly split between 3-member, 4-member and 5-member households.

Children in Household

Sixty-three percent of non-resident travelers to Louisiana do not have children in their households. Households with one or two children account for 29% of non-resident visiting households.

Marital Status

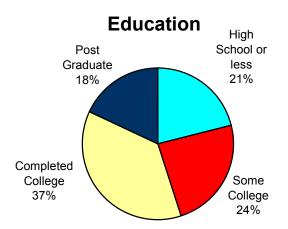
Sixty-one percent of household heads are married, 17% have never married and 22% are divorced, widowed or separated.



Marital Status

Education

More than sixty percent of household heads either finished some college (24%) or completed college (37%). Household heads with high school education or less account for 21% of visitors. In 18% of households the head of household has done some post graduate work.

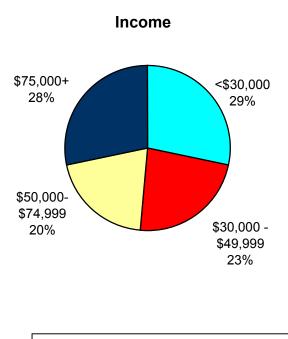


Employment

Seventy-three percent of non-resident travelers to Louisiana are employed full time. Six percent are employed part time, 17% are retired and 3% are unemployed.

Income

The average income of non-resident visitors to Louisiana is \$56,800, slightly lower than the U.S. traveling households' average of \$63,100. Of those visiting, 28% have incomes below \$30,000 (compared to 22% U.S.), 23% have incomes between \$30,000 and \$50,000, 20% have incomes between \$50,000 and \$75,000 and 28% have incomes over \$75,000 (compared to 33% U.S).



Average (mean) income = \$56,800 Median income = \$48,500

Summary Table of Visitor Demographics

TRAVELING HOUSEHOLD		Louisiana				
DEMOGRAPHICS	Total <u>U.S.</u>	<u>Total</u>	<u>Resident</u>	<u>Non-Resident</u>	<u>Pleasure</u>	Bus/Conv.
Household Size						
One person	22%	23%	22%	23	24%	23%
Two people	36	34	28	36	35	30
Three people	17	16	19	15	16	16
Four people	15	14	17	14	13	18
Five or more people	10	13	14	13	13	13
Children in Household						
None	64%	61%	56%	63%	64%	57%
One	16	17	24	15	15	18
Тwo	13	14	12	14	14	14
Three	6	7	8	7	6	9
Four or more	2	1	*	1	1	1
Marital Status						
Married	63%	60%	60%	61%	59%	67%
Never married	19	18	20	18	19	15
Divorced, Widowed, Separated	18	22	21	22	23	18
Education						
High school education or less	19%	24%	35%	21%	29%	15%
Some college – no degree	24	23	20	24	26	17
Completed College	37	35	27	37	30	50
Post graduate work	20	18	19	18	17	19
Employment						
Full time	74%	72%	69%	73%	69%	87%
Part time	7	8	12	6	8	3
Retired	16	16	13	17	19	7
Not employed	3	4	5	3	4	3
Annual Household Income						
Less than \$50,000	45%	52%	67%	46%	57%	31%
\$50,000-\$74,999	22	20	15	22	19	27
\$75,000 or more	33	28	18	31	24	42
Mean	\$63,100	\$56,800	\$44,400	\$60,800	\$52,300	\$72,300
Median	\$54,800	\$48,500	\$35,100	\$53,500	\$41,700	\$68,500

Demographics are for the head of household.

Details may not add to 100% due to rounding.

* Less than 1%.

<u>Lifestage</u>

Two of five (42%) non-resident Louisiana visitors are parents. Almost half of this group (18% of total) are older parents (age of household head 45+ and children of any age). Couples are the next most predominant lifestage group visiting Louisiana, accounting for one in three visitors (30%). Singles and roommates account for an additional 28% of visitors. (See Appendix C for definitions of Lifestage groups.)

(percent of non-resident household trips)			
Singles	23%		
Young Singles	8%		
Middle Singles	11%		
Older Singles	4%		
Couples	30%		
Young Couple	7%		
Working Older Couple	14%		
Retired Older Couple	9%		
Parents	42%		
Young Parent	12%		
Middle Parent	12%		
Older Parent	18%		
Roommates	5%		

(percent of non-resident household trips)

PRIZM Clusters*

When examining the 62 PRIZM clusters and the 15 social groups within which these clusters fall, we find that Louisiana visitors come from a wide socioeconomic spectrum. The top three social groups visiting Louisiana are a good indication of this range, including people from Rustic Living areas (13%), Elite Suburbs (11%) and 2^{nd} City Centers (10%).

Top PRIZM Social Groups

(percent of 2000 Non-Resident Louisiana person-trips)

<u>Group</u>	Percent
Rustic Living	13%
Elite Suburbs	11%
2 nd City Centers	10%

The top non-resident visitor cluster type is Kids & Cul-de-sacs (5% of person trips), part of the Elite Suburbs, a group of high economic status. Scrub Pines Flats is a close second (4%) but the opposite in economic status, consisting of blue color, moderately low income households. This dichotomy continues with the second tier of clusters including low income and high education/high income households. Mid-level city and large-city suburban households are the most urban clusters represented at any significant level. Large city urban households are not highly represented among Louisiana non-resident visitors.

Top 10 PRIZM Clusters

(percent of 2000 Non-Resident Louisiana person-trips)

<u>Social Group</u>	<u>Cluster</u>	Percent	<u>Socioeconomic Type</u>
Elite Suburbs	Kids & Cul-de-sacs	5%	А
Rustic Living	Scrub Pines Flats	4	С
2 nd City Society	Upward Bound	4	А
Working Towns	Norma Rae-ville	4	С
Exurban Blues	Middle America	4	В
Rustic Living	Back Country Folks	3	С
Landed Gentry	God's Country	3	В
2 nd City Blues	Southside City	3	С
2 nd City Society	Second City Elite	3	А
Rustic Living	Blue Highways	2	С

Socioeconomic Types:

A= High education, high income,

B= Moderately high income, mostly suburban dwellers,

C= Moderate or moderately low income, mostly blue collar.

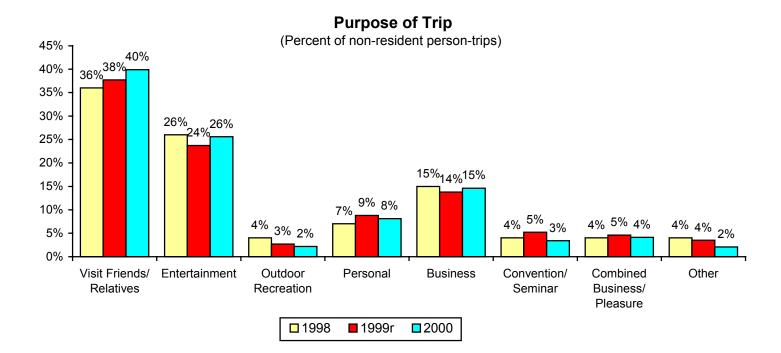
* PRIZM is a geodemographic (neighborhood segmentation) system developed from U.S. census demographic data. Households are grouped into "clusters" that exhibit similar demographic and behavioral characteristics. Six categories of variables explain most of the differences: Social Rank (including income and education), Household Composition, Mobility, Ethnicity, Urbanization and Housing. See appendix C, Glossary of Terms, for more detailed descriptions of the above social groups and clusters.

TRIP CHARACTERISTICS (Non-Resident Visitors)

Primary Purpose of Trip

Pleasure visitors continue to comprise around two thirds (68%) of domestic visitors to Louisiana. Pleasure visitors are travelers whose purpose is visiting friends and relatives, entertainment or outdoor recreation. Close to 22% of domestic visitors came for business/convention purposes, and four percent combined business and pleasure. The remaining two percent traveled to Louisiana for other reasons. There has been an increase in visit friends and relatives and entertainment as reasons for traveling and a decrease in travel for convention/seminar purposes since 1999.

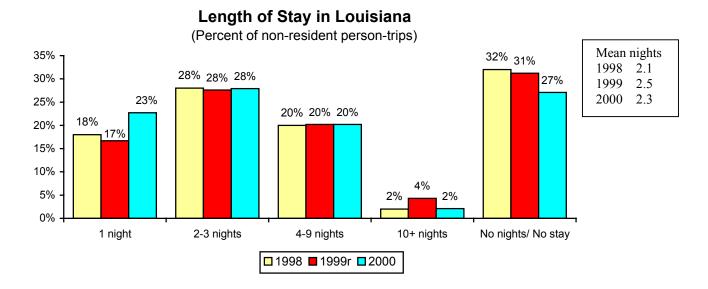
Compared to the average U.S. domestic traveler, Louisiana non-resident visitors visit more for entertainment purposes (26% LA vs. 16% U.S.) and less for outdoor recreation (2% vs. 10% U.S.)



Length of Stay

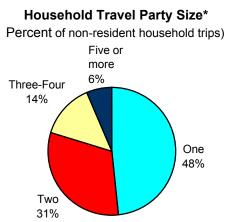
Just under a third (27%) of Louisiana non-resident visitors are day visitors. This is lower than in 1999 (31%) figures but significantly more than the U.S. average (16% day trip visitors). (Note: Travelers visiting Louisiana may have stayed overnight in another state as part of their trip, making just a day trip to Louisiana.)

Of 2000 domestic non-resident trips including a stay in Louisiana, an average of 4 nights were spent on the entire trip. These travelers spent an average of 2.3 nights in Louisiana (or 58% of the total trip duration). The share of 1-night stays has increased significantly since 1999 (from 17% to 23%) while the volume of stays of 10 nights or more has declined slightly (from 4% to 2%).



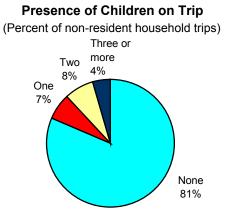
Travel Party size and presence of children

The majority of trips to Louisiana in 2000 involved one person from the household (48%). Almost a third of trips (30%) include two household members, while one in five trips (20%) involved three or more household members. Nineteen percent of trips include children under the age of eighteen.



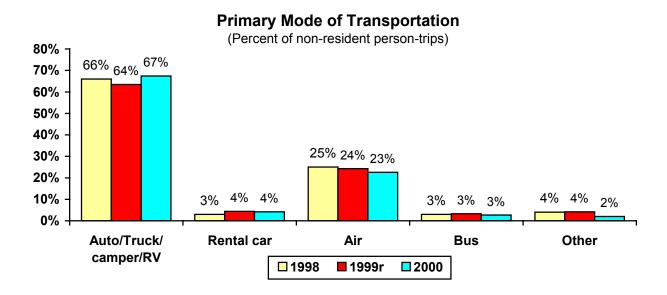
* The travel party may have included other non-household members.

2000 TravelScope[®] Profile of U.S. Travelers to Louisiana



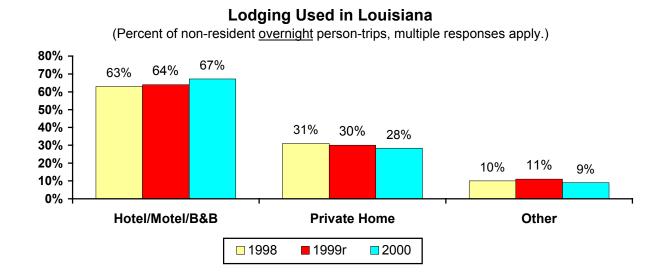
Primary Mode of Transportation

In Louisiana, as in the U.S. as a whole, the majority of travel is by personal auto/truck/camper/RV (67% LA vs. 74% U.S.). Rental cars account for a small amount (4%) of primary transportation in Louisiana but are used somewhat more frequently (6%) as a secondary means of transportation. Just over one in five (23%) of Louisiana non-resident visitors traveled by air. Other transportation types, including bus, train and boat, account for 6% of person-trips.



Type of Lodging

Most (73%) of Louisiana non-resident visitors stay at least one night in the state. Two thirds (67%) of these overnight visitors use hotel/motel/b&b's for their overnight lodging. This is significantly higher than the national average of 52%. The majority of visitors who do not stay in a hotel/motel/b&b stay in a private home with friends or family.



Month and Season of Travel

Non-resident travel to Louisiana in 2000 was fairly evenly distributed across the seasons. Spring had the highest share of travel (30% total/28% non-resident), more noticeably so when resident travelers are also included. The heaviest single months are March, May and July. Winter is the slowest season (21% total/23% non-resident) largely due to January being the slowest month overall.

Travel by Season

(Percent person-trips)					
	Total	Non-resident		Total	Non-resident
<u>Winter</u>	21%	23%	<u>Summer</u>	26%	25%
January	6%	6%	June	8%	8%
February	7%	8%	July	10%	10%
December	8%	9%	August	8%	7%
<u>Spring</u>	30%	28%	<u>Fall</u>	23%	24%
March	10%	11%	September	7%	8%
April	8%	6%	October	8%	8%
May	12%	11%	November	8%	8%

Cities Visited

New Orleans is the most popular city destination within Louisiana with 52% of non-resident travelers visiting there in 2000. Sixteen percent of non-resident visitors went to Shreveport-Bossier City, 9% to Baton Rouge, 6% each to Lafayette and Lake Charles, 3% to Monroe and 1% to Alexandria. (See Appendix E for explanation of city volume estimates.)

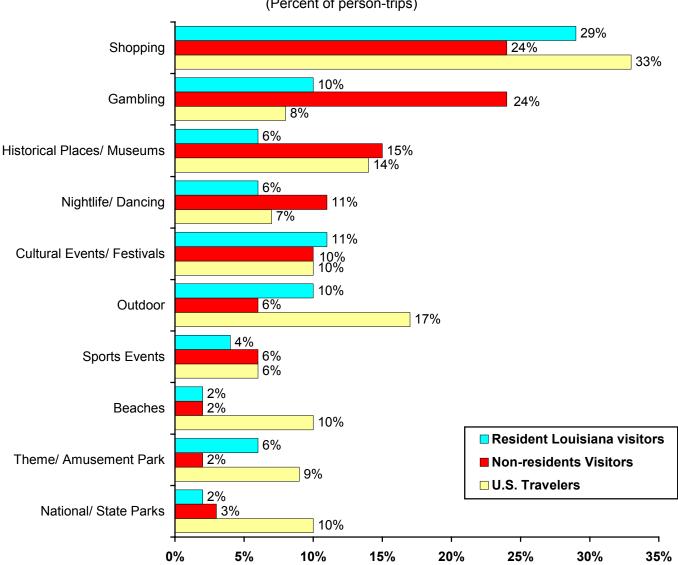
2000 Top Cities Visited within Louisiana (percent/count of non-resident person trips)		
Estimated Vo		ted Volume
City	Percent	Count
New Orleans	52%	9,014,526
Shreveport-Bossier City	16%	2,842,514
Baton Rouge	9%	1,606,376
Lafayette	6%	1,077,036
Lake Charles	6%	1,066,358
Monroe	3%	451,625
Alexandria	2%	256,170

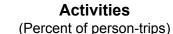
Activities participated in

Shopping is once again the most popular activity for all visitors to Louisiana, with almost one in four (24%) visitors citing it as a trip activity. Yet, Louisiana visitors are less likely to include shopping on their trip compared to U.S. travelers in general (33%). Gambling is the second most popular activity with 21% of all visitors participating in gambling while in Louisiana. This is largely driven by non-resident visitors, 29% of whom said they gambled. The third most popular activity is visiting historical places/museums (6% non-resident/15% non-resident), followed by nightlife/dancing, cultural events/festivals, and outdoor activities.

Louisiana visitors participate more than the U.S. average in gambling and nightlife/dancing but less in outdoor activities, visiting national/state parks, beaches and theme/amusement parks.

There has been an increase in share of visitors gambling (total 17% in 1999 vs. 21% in 2000) but a decrease in nightlife/dancing (total 13% in 1999 vs. 10% in 2000).

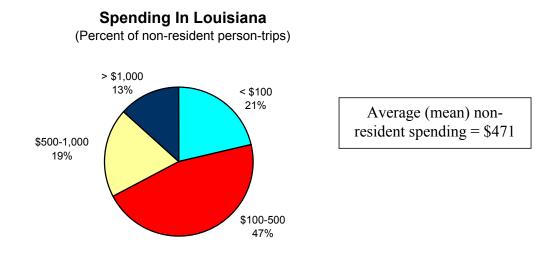




2000 TravelScope[®] Profile of U.S. Travelers to Louisiana

Spending

The average trip expenditure in Louisiana by domestic non-resident visitors in 2000 was \$471 (includes day trips) versus \$461 in 1999. Forty seven percent of visitors spent between \$100 and \$500 while in Louisiana. Trips involving \$500 or more in spending made up about one third (32%) of trips to Louisiana in 2000. One in five non-resident visitors (21%) spent less than \$100. Resident spending is much lower than that of non-residents, averaging just \$188 per trip.



Other States Visited

One out of four (25%) non-resident Louisiana visitors also visited Mississippi, while one in five (18%) visited Texas on the same trip. One in ten (10%) included Alabama on their trip. Other states with significant cross travel include Florida, Arkansas, Tennessee and Georgia.

2000 Other States Visited on Louisiana Trip (percent of non-resident person-trips)			
State	Total Visitors	Non-resident Visitors	
Mississippi	22%	25%	
Texas	15%	18%	
Alabama	8%	10%	
Florida	4%	6%	
Arkansas	3%	4%	
Tennessee	2%	3%	
Georgia	2%	3%	

Group Tour Participation

Of Louisiana non-resident visitors, 6% participated in group tours (1.1 million visitors), up 1.5 percentage points from 1999 (4.5% of total or 673,000 visitors). This is significantly higher than the U.S. average of 3% group tour use.

MINORITY TRAVEL

This section of the report examines the characteristics of minority travelers to Louisiana, focusing specifically on the large number of African-American travelers to the state. Two cautions are necessary when looking at this data. First, the data are based on a relatively small sample size. The sample is too small to consider segmenting just non-resident travel, therefore the following information is based on all African-American travelers in the state.

The second caution is due to a known underrepresentation of minority travelers in the household panel used for this survey. The following data are based on those African-American travelers in the panel and therefore volume estimates may significantly underrepresent total African-American travel volumes. However, travel trends and travel characteristics should be representative of African-American travelers overall.

African-American Visitors to Louisiana

A significant portion of visitors to Louisiana are African-American (11%), while other minority groups account for only 2.5% of overall visitors. This is one of the highest shares of African-American visitors among the states. Mississippi, Georgia and Alabama have a similar high share of African-American visitors. This is not surprising, since states of residence are correlated with states of destinations when it comes to U.S. travel, and these states have higher-than-average populations of African-Americans.

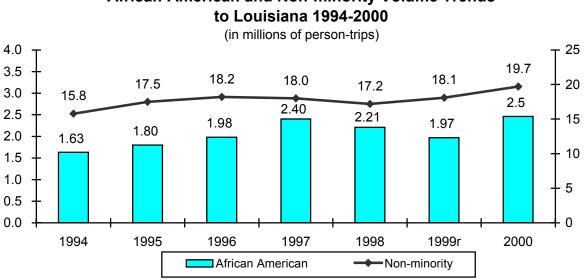
States with 10% or more share of African-American visitors

	Percent of that state's
<u>State</u>	<u>person-trip visitors</u>
Mississippi	12%
Georgia	11%
Louisiana	11%
Alabama	10%

Trends

African-American travel to Louisiana increased at a faster pace in 2000 than travel to the state overall. There were 2.5 million African-American visitors to Louisiana in 2000, up from 1.9 million since 1999. That represents a 25% increase, compared to the 12% increase seen overall in Louisiana. African-American volumes generally trend the same as non-minority volumes except for 1997 and 1999. In 1997 African-American visitors increased while non-minority visitors were relatively flat. In 1999 non-minority visitors increased considerably while African-American travel declined.

African-American visitors to Louisiana have increased travel for pleasure and business purposes, their frequency of short trips (day-trips and 1-2-day stays), their use of hotels, and their use of group tours since 1999. In the same timeframe, they have decreased their use of rental cars, their longer stays (3+ days) and their overall spending.



African-American and Non-minority Volume Trends

Trip Characteristics

Minority household travel patterns in the U.S. have many similarities to that of all domestic U.S. traveling households. This is also true for African-American travelers in Louisiana. African-American travelers to Louisiana travel most for pleasure, travel with 2 household members on average, like to shop and visit historic sites, and are just as likely to have some college education. But there are also differences between African-American and non-minority visitors to Louisiana.

Compared to non-minority visitors, African-American visitors to Louisiana are:

- More likely to be traveling for the purpose of visiting family and friends.
- More likely to rent a car or travel by bus.
- More likely to be on a day trip.
- More likely to attend cultural events/festivals
- Shopping more.
- Gambling and participating in nightlife/dancing more.
- Participating more in group tours.
- Less likely to be married
- Less likely to have a postgraduate education
- From households with lower average annual incomes
- Spending less on Louisiana trips.

COMPETITIVE COMPARISON

This section compares travel characteristics of Louisiana to a competitive group of states including Texas, Mississippi, Alabama, Tennessee, Georgia and Florida. Analysis is based on total travelers (not just non-residents) and all trip characteristics are based on the entire trip. Many of these trips involve stays in more than one of the competitive states.

Competitive States' Visitors Also Visiting Louisiana

It was noted earlier that one out of four (25%) non-resident Louisiana visitors also visited Mississippi while one in five (18%) visited Texas on the same trip. When we look at visitors to these other states, we see a similar pattern. Of all visitors to Texas, 5% (or 3.5 million) also visit Louisiana on the same trip. Twenty three percent of Mississippi's 22 million visitors, 8% of Alabama's 22 million visitors, and 1% each of Tennessee, Georgia and Florida's visitors also visit Louisiana.

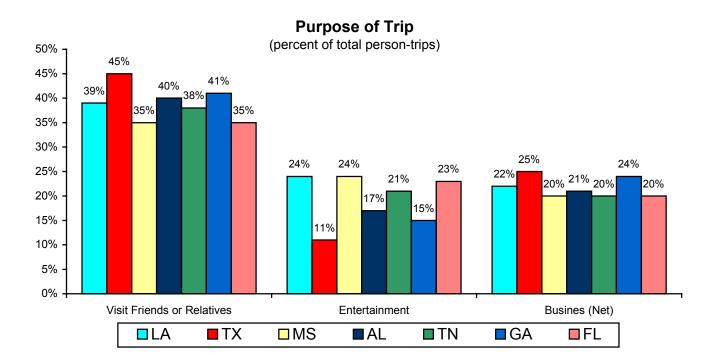
Competitive States' Visitors Also Visiting Louisiana			
Visitors to:	Total Visitor Volume (in millions of <u>person-trips)</u>	Percent also visiting Louisiana <u>on the same trip</u>	Actual Volume (in millions of <u>person-trips)</u>
Texas	73.5 million	5%	3.5 million
Mississippi	22.1	23	5.0
Alabama	22.2	8	1.8
Tennessee	35.7	1	0.5
Georgia	42.1	1	0.4
Florida	77.9	1	1.0

Volume Trends

These competitive states have experienced significantly different levels of growth from 1999 to 2000. Louisiana and Mississippi both experienced 12 percent growth in visitor volume in 2000. Florida volume also grew significantly (+9%), while Texas grew slightly slower (+4%). Alabama, Tennessee and Georgia all saw decreases in visitor volume since 1999 by anywhere from 2% to 5%.

Purpose of Trip

Reasons for traveling are generally similar across the compeatitive set of six states with a few exceptions. The share of trips to visit frients and relatives varies, with Texas having a significantly higher proportion of these trips and Mississippi and Florida having lower proportions. Trips for entertainment purposes are more predominant in Louisiana, Mississippi, and Florida. Business trips are more predominant in Texas and Georgia.



Transportation Mode

Auto travel to Louisiana (at 77% of person-trips) is consistent with national travel patterns. Competitive states, however, differ considerably. Trips to Mississippi, Alabama and Tennessee are significantly more likely to be by auto (84%-86%). Texas and Georgia are similar to Louisiana, and the U.S. as a whole. Florida sees less auto travel (62%).

Total Trip Duration

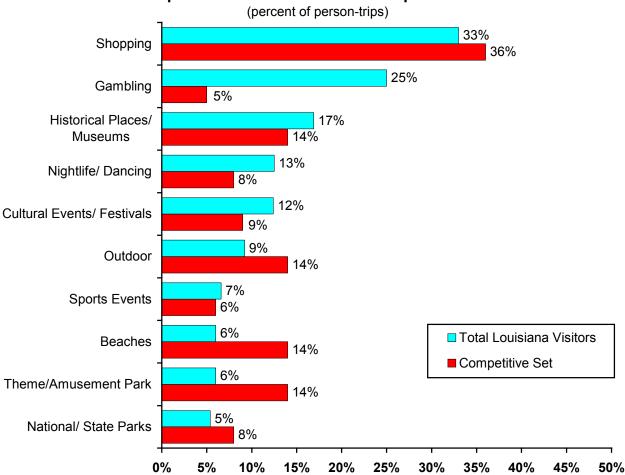
Trips involving Louisiana have a slightly larger percent of day trips (14%) compared to trips involving the competitive states (12% as a group). Average (mean) total trip duration for Louisiana trips is 3.5 nights, compared to 4.2 nights for trips to the competitive states as a group. Trips involving Texas and Mississippi have similar average stays (3.8 and 3.6 nights respectively) while trips are generally significantly longer when they involve Alabama (4.0), Tennessee (4.2), Georgia (4.6) or Florida (5.3).

Lodging

Hotel/Motel/B&B use is higher on trips involving Louisiana (56% of person trips involve hotel/motel/B&B lodging) than on trips involving competitive states (51%). Within the states, however, trips involving Mississippi, Tennessee, Georgia and Florida all have similar levels of hotel use (53% to 58%), while trips involving Texas and Alabama have significantly lower hotel use (46% to 48%). RV/Tent use is much lower on Louisiana trips (2%) compared to trips competitive states (6%).

Activities

Visitors on trips involving Louisiana are much more likely to say they included gambling on their trips (25%) than visitors on trips to other competitive states. The exception is visitors traveling to Mississippi who are slightly more likely to include gambling (32%). Visitors traveling to Louisiana also have a slightly higher level of historical-cultural (17% vs. 14%) and cultural events/festivals (12% vs. 9%) participation than trips to competitive states. Visitors on trips involving Louisiana are less likely to include the beach (6% LA vs 14% competitive), theme/amusement parks (6% vs. 14%), outdoor activities (9% vs 14%), shopping (33% vs. 36%) and national/state park (5% vs. 8%) on their trips.



Trip Activities: Louisiana vs. Competitive Set

APPENDICES

METHODOLOGY

TravelScope is a cooperative research effort, funded by states, cities and other participants and managed by the research department of the Travel Industry Association. Since 1994, TravelScope has collected visitor volume, market share, trip characteristics, and demographics for all U.S. resident travel.

To collect these data, TravelScope uses a mail panel of U.S. households operated by National Family Opinion (NFO) Research, Inc. Each month, a representative sample of 25,000 households is mailed a questionnaire that asks the total number of trips of 50 miles or more away from home and/or overnight trips taken in the previous month by all members of the household. On average, TIA obtains responses from 5,000 traveling households each month.

The panel has more than 550,000 households representing over 1.2 million people nationwide (or one in every 182 U.S. households) – the largest consumer panel in the industry. So that samples are representative of all U.S. households, the panel is selected to match the U.S. census population on five variables: census region of residence, market size of residence, age of household head, household income, and household size.

Respondents are asked to record details of up to three trips taken in the previous month. Specifically, the survey collects information on:

- •primary and secondary purpose of trip,
- •primary and secondary mode of transportation,
- •the number of household members traveling (adults and children),
- •whether the trip was a group tour,
- •up to three states or countries visited on each trip,
- •key cities/places visited in each state/country,
- •the number of nights in each type of accommodation,
- •trip expenditures, and
- •activities.

TravelScope demographic information is collected from each responding household head via the NFO Research mail panel. The demographics reflect the profile of heads of household, although it is possible that someone else in the household is the traveler. Responses are sample-balanced to match the U.S. population.

The margin of sampling error for this survey (at the 95 percent confidence level) is plus or minus approximately 0.5 percentage points for the entire sample. Subgroups will have larger margins of error, depending on the number of households in the group. The sample size and margin of sampling error for Louisiana is listed below. For example, if you have a confidence interval of 3 and 50% percent of your sample chooses a particular answer for a survey question, you can be 95 percent confident that if you had asked the question of the entire relevant population between 47% and 53% would have chosen that particular answer.

<u>Es</u>	stimate of Sampling Erro	<u>r</u>
	Sample <u>Size</u>	95 Percent Confidence <u>Level</u>
Total Households	61,748	+/- 0.4%
Louisiana	1,811	+/- 2.3%
African-American visitors to Louisiana	201	+/- 6.9%

Data for 1999 was revised in 2000. This revision reflects a change in our sample balancing procedures. Data had been sample balanced based on five demographic variables (census region, market size, age, income and household size). In 2000, this procedure was modified so that data were balanced by four variables (market size, age, income and household size) within each of the nine census regions. At the same time, small adjustments were made to some weighting factors in the 1999 database. This more detailed sample balancing procedure ensures better representation of the data at the regional and state level.

TRAVELSCOPE SURVEY CARD

SEI F (Se	PTEMBER Trip #1 Purpose ee Codes)	Trans- portation (See Codes)	# HH Members Traveling Age 0-17 # Age 18+ # Group Tour	 information for your List States/ Countries Visited (X if passed through only) 1. 	Key Cities & Places Visited In That State/ Country	# Nights In Each Hotel/ Pri- (Motel/ vate B&B Home	State/Country Condo/ Time RV/ Share Tent	In: Total \$ Spent 문 Per State/ Country	Activities In State/Country (See Codes)
Seco	ondary:	Primary: Secondary:	1 Yes 2 No	□ 1 □ 2 □ 3			\$## \$##	* \$ * \$ * \$	
2=0 3=E	Outdoor rec Entertainme sightseeir	reation 6=E nt (e.g., 7=F	Convention/semina Rusiness Personal Other	ar 1=Own Auto/ Truck 2=Rental car 3=Camper/RV 4=Ship/Boat	TION CODES 5=Airplane 6=Bus 7=Train 8=Other	ACTIVIT 01=Historical pla 02=National/Stat 03=Cultural even 04=Theme/Amus 05=Outdoor (e.g	ces/Museums e Park its/Festivals sement Park	08=Beach 09=Golf/T 10=Sports	ife/Dancing es 'ennis/Skiing s event
					\sim				
	EDTEMPED		# HH Members	Liet States/	Key Cities &	# Nights In Fa	ch State/Country	v lit: Total \$	
6160	EPTEMBER Trip #2 Purpose See Codes)	Trans- portation (See Codes)	# HH Members Traveling Age 0-17 # Age 18+ #	Countries Visited (X if passed through only)	Key Cities & Places Visited In That State/ Country	Hotel/ Pri- Motel/ vate B&B Home	ch State/Country Condo/ Time RV/ Share Tent	Spent 한 Per State/ 전 Country	Activities In / State/Countr {See Codes}
(S Pr Sec	Trip #2 Purpose See Codes) rimary: condary:	portation (See Codes) Primary: Secondary:	Traveling Age 0-17 # Age 18+ # <u>Group Tour</u> 1 Yes 2 No	Countries Visited (X if passed	Places Visited In That State/	Hotel/ Pri- Motel/ vate	Condo/ Time RV/	Spent	/ State/Countr
FIECC (S Pr Sec Pr	Trip #2 Purpose See Codes) rimary:	portation (See Codes) Primary:	Traveling Age 0-17 # Age 18+ # <u>Group Tour</u> 1 Yes	Countries Visited (X if passed through only) 1 2 3 1 2 2	Places Visited In That State/	Hotel/ Pri- Motel/ vate B&B Home ##	Condo/ Time RV/ Share Tent	Spent E Per State, Country Country #	/ State/Countr

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Not shown actual size.

## **GLOSSARY OF TERMS**

| Activities                             | TravelScope gathers information on 11 different activity categories: (1) visits to historical places or museums; (2) visits to national or state parks; (3) attending cultural events or festivals; (4) going to theme or amusement parks; (5) outdoor activities (e.g., hunting, fishing, hiking); (6) shopping; (7) night life or dancing; (8) going to the beach; (9) playing golf, tennis or going skiing; (10) attending sports events; and (11) gambling. |
|----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Annual Household<br>Income             | The total combined annual income of the household before taxes.                                                                                                                                                                                                                                                                                                                                                                                                 |
| Business Trip                          | Any trip where the primary purpose of the trip is given as "business," "convention/seminar," or "combined business/pleasure."                                                                                                                                                                                                                                                                                                                                   |
| Census Region of<br>Origin/Destination | Regional breakdowns as defined by the U.S. Bureau of Census:                                                                                                                                                                                                                                                                                                                                                                                                    |
| Northeast                              | New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island and Vermont.                                                                                                                                                                                                                                                                                                                                                                        |
|                                        | Mid-Atlantic: New Jersey, New York and Pennsylvania                                                                                                                                                                                                                                                                                                                                                                                                             |
| South                                  | South Atlantic: Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia and West Virginia.                                                                                                                                                                                                                                                                                                                         |
|                                        | East South Central: Alabama, Kentucky, Mississippi and Tennessee.                                                                                                                                                                                                                                                                                                                                                                                               |
|                                        | West South Central: Arkansas, Louisiana, Oklahoma and Texas.                                                                                                                                                                                                                                                                                                                                                                                                    |
| Midwest                                | East North Central: Illinois, Indiana, Michigan, Ohio and Wisconsin                                                                                                                                                                                                                                                                                                                                                                                             |
|                                        | West North Central: Iowa, Kansas, Minnesota, Missouri,<br>Nebraska, North Dakota and South Dakota.                                                                                                                                                                                                                                                                                                                                                              |
| West                                   | Mountain: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah and Wyoming.                                                                                                                                                                                                                                                                                                                                                                              |
|                                        | Pacific: California, Oregon and Washington. (Alaska and Hawaii as destinations only)                                                                                                                                                                                                                                                                                                                                                                            |
| Designated Market<br>Area (DMA)        | Designated Marketing Areas (DMAs) are areas of television coverage<br>defined by counties that are based on surveys conducted by Nielsen Media<br>Research. A DMA is often larger than a Metropolitan Statistical Area (MSA).                                                                                                                                                                                                                                   |

**Household** Comprises all persons who occupy a "housing unit", that is, a house, an apartment, or other group of rooms, or a room that constitutes separate living quarters.

Index (minority) Indices are used as a tool to compare the travel and demographic characteristics of minority travelers to those of total U.S. travelers. Thus, total U.S. domestic travelers serve as the average, with an index equal to 100. An index higher than 100 indicates an above-average propensity for a minority group to exhibit a travel behavior or demographic characteristic, while an index lower than 100 indicates a below-average propensity for a minority group to exhibit a travel behavior or demographic characteristic

The formula used to calculate each index is:

 $\frac{\% \text{ of ethnic group who report trip or demographic characteristic}}{\% \text{ of total U.S. travelers who report trip or demographic characteristic}} x 100 = \text{index}$ 

EXAMPLE <u>28% of Asian-Americans report their primary trip purpose is business</u> =  $1.33 \times 100 = 133$  index 21% of total U.S. travelers report their primary trip purpose is business

- Leisure Trip Any trip where the primary purpose of the trip is given as "visit friends or relatives, outdoor recreation, entertainment (e.g., sightseeing, sports), or personal."
- **Length of Stay** The number of nights spent on entire trip.
- Lifestages Lifestage groups are based on household size and composition (e.g. number of members, marital status, presence of chilkren), age of household head, and employment of household head.
  - Young Singles: 1 Member Household Age of Head Under 35
  - *Middle Singles:* 1 Member Household Age of Head from 35 to 65
  - *Older Singles:* 1 Member Household Age of Head over 65
  - Young Couple: Multi member Household Age of Head Under 45 Married or Non-related Individual(s) of opposite sex 18+ present No children present

| Working<br>Older Couple:                  | Multi member Household<br>Age of Head 45 and over<br>Head of Household Employed<br>Married or Non-related Individual(s) of Opposite Sex 18+ Present<br>No Children Present                                                                                                                                                                                                                     |
|-------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Retired<br>Older Couple:                  | Multi member Household<br>Age of Head 45 and Over<br>Head of Household Not Employed<br>No Children Present<br>Married or Non-related Individual(s) of Opposite Sex 18+ Present                                                                                                                                                                                                                 |
| Young Parent:                             | Multi member Household<br>Age of Head Under 45<br>Youngest Child Under 6                                                                                                                                                                                                                                                                                                                       |
| Middle Parent:                            | Multi member Household<br>Age of Head Under 45<br>Youngest Child 6+                                                                                                                                                                                                                                                                                                                            |
| Older Parent:                             | Multi member Household<br>Age of Head 45+<br>Child at Home Any Age                                                                                                                                                                                                                                                                                                                             |
| Roommates:                                | Unmarried Head of Household<br>Living with a Non-relative 18+ of Same Sex                                                                                                                                                                                                                                                                                                                      |
| Lodging                                   | Information is gathered on five lodging categories: (1) hotel/motel/b&b (2) private home; (3) condominium/time share; (4) recreational vehicle/tent; and (5) other.                                                                                                                                                                                                                            |
| Mode of<br>Transportation                 | Each trip is classified according to the respondent's answer to the question, "Primary and secondary transportation (mode)." See air mode and auto mode.                                                                                                                                                                                                                                       |
| Nights Away<br>from home                  | The number of nights spent away from home on one trip, including nights spent at the destination and en route. It is possible for a trip not to involve an overnight stay if the traveler took at trip of 50 miles or more, one-way, and returned home the same day.                                                                                                                           |
| Number of<br>Household<br>Members on Trip | Number of household members on a trip, including the respondent.                                                                                                                                                                                                                                                                                                                               |
| Person-Trip                               | A person on a trip. If three persons from a household go together on one trip, their travel counts as one trip and three person-trips. If three persons from this household take two trips, they account for six person-trips. (A trip is counted each time one or more members of a household travel 50 miles or more, one-way, away from home or spends one or more overnights and returns.) |

| Pleasure Trip                 | Any trip where the primary purpose of the trip is given as "visit friends or relatives, outdoor recreation, or entertainment (e.g., sightseeing, sports)."                                                                                                                                                                                                                                                                                             |
|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| PRIZM Clusters                | A geodemographic (neighborhood segmentation) system developed from U.S. census demographic data. Households are grouped into "clusters" that exhibit similar demographic and behavioral characteristics. Six categories of variables explain most of the differences: Social Rank (including income and education), Household Composition, Mobility, Ethnicity, Urbanization and Housing. The 62 clusters are combined into 15 distinct Social Groups. |
| Social Groups                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Elite Suburbs:                | Suburban dwellers with high incomes and high education, investment and spending.                                                                                                                                                                                                                                                                                                                                                                       |
| Exurban Blues:                | Predominantly white residents of mid-scale, low-density towns on the outskirts of major metropolitan areas and second cities.                                                                                                                                                                                                                                                                                                                          |
| Rustic Living:                | People predominantly from remote country towns, villages, hamlets and reservations with lower-middle income and low cost of living generally working as craftsmen and laborers.                                                                                                                                                                                                                                                                        |
| 2 <sup>nd</sup> City Centers: | Middle-density satellite city or second-tier city dwellers with midscale economic status.                                                                                                                                                                                                                                                                                                                                                              |
| 2 <sup>nd</sup> City Blues:   | Second-tier city dwellers living in downtown neighborhoods.                                                                                                                                                                                                                                                                                                                                                                                            |
| Urban Cores:                  | Low income singles and families living in multi-racial communities of dense rented rowhouses and high-rise apartments.                                                                                                                                                                                                                                                                                                                                 |
| Working Towns:                | Mostly blue-collar workers in remote "exurbs" and satellite towns outside major metropolitan areas and second cities.                                                                                                                                                                                                                                                                                                                                  |
| <u>Clusters</u>               |                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Back Country<br>Folks:        | Remote rural town families.                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Blue Highways:                | Moderate blue-collar farm families in remote areas through our mountains and along our coasts, deserts, and lake shores.                                                                                                                                                                                                                                                                                                                               |
| God's Country:                | Executive families living away from cities.                                                                                                                                                                                                                                                                                                                                                                                                            |
| Gray Collars:                 | Aging, highly skilled blue-collar workers in inner suburbs, predominantly in the Great Lakes "Rust Belt."                                                                                                                                                                                                                                                                                                                                              |
| Inner Cities:                 | Inner-city single parent families, largely African-American.                                                                                                                                                                                                                                                                                                                                                                                           |
| Kids &                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Cul-de-sacs:                  | Upscale, white-collar professional suburban families.                                                                                                                                                                                                                                                                                                                                                                                                  |
| Middle America:               | Midscale families in mid-size towns.                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Mid City Mix:                 | Ethnically diverse singles and families living in urban rowhouse<br>neighborhoods with a mix of service, white-collar and blue-collar<br>employment.                                                                                                                                                                                                                                                                                                   |

| Norma Rae-ville:      | Young families in bi-racial mill towns, centered in the South, the Mississippi delta, and the Gulf coast and Atlantic states.                                                                                                                                                                                                                                         |
|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Scrub Pine Flats:     | Older African-American farm families located mainly in the coastal flatlands of the Atlantic and Gulf states.                                                                                                                                                                                                                                                         |
| Second City<br>Elite: | Upscale, professional executive families in second-tier cities or satellite cities of major metropolitan areas.                                                                                                                                                                                                                                                       |
| Smalltown             |                                                                                                                                                                                                                                                                                                                                                                       |
| Downtown:             | Mostly young people living near city colleges and working in low-level white-collar sales and technical jobs.                                                                                                                                                                                                                                                         |
| Southside City:       | African-American service workers scattered throughout the Southeast, the smaller Mississippi delta cities, the Gulf coast and the Atlantic states.                                                                                                                                                                                                                    |
| Upward Bound:         | Young upscale white-collar families.                                                                                                                                                                                                                                                                                                                                  |
| Purpose of Trip       | Each trip is classified according to the respondent's answer to the questions "primary and secondary purpose" with these categories: (1) visit friends or relatives, (2) outdoor recreation, (3) entertainment (e.g., sightseeing, sports), (4) combined business/pleasure, (5) convention/seminar, (6) business, (7) personal, (8) other.                            |
| Trip                  | A household trip. The term "household trips" counts multiple trips taken by U.S. households in a year. To qualify, a "household trip" must be 50 miles or more, one-way, away from home or include one or more overnights. Respondents are instructed to not include trips commuting to/from work or school or trips taken as a flight attendant or vehicle operator. |

### **BRAND DEVELOPMENT INDEX**

The Brand Development Index (BDI) is calculated by dividing the percentage of visitors Louisiana receives from that Designated Marketing Area (DMA) by the DMA's population. It gives an indication of the propensity for travel to Louisiana that is relative to the population size.

| 2000 DMA Brand Development Index for Louisiana |                     |                    |                            |                  |       |  |
|------------------------------------------------|---------------------|--------------------|----------------------------|------------------|-------|--|
| City (DMA) of origin                           | Population<br>(000) | Percent population | Total<br>Visitors<br>(000) | Percent visitors | INDEX |  |
| BILOXI-GULFPORT                                | 348                 | 0.1%               | 486                        | 2.1%             | 1651  |  |
| BEAUMONT-PORT ARTHUR                           | 448                 | 0.2%               | 598                        | 2.6%             | 1577  |  |
| TYLER-LONGVIEW                                 | 638                 | 0.2%               | 640                        | 2.8%             | 1187  |  |
| JACKSON, MS                                    | 858                 | 0.3%               | 626                        | 2.7%             | 863   |  |
| HATTIESBURG-LAUREL                             | 273                 | 0.1%               | 164                        | 0.7%             | 709   |  |
| COLUMBUS-TUPELO-WEST POINT                     | 476                 | 0.2%               | 271                        | 1.2%             | 674   |  |
| MERIDIAN                                       | 185                 | 0.1%               | 104                        | 0.5%             | 669   |  |
| MOBILE-PENSACOLA                               | 1,272               | 0.5%               | 706                        | 3.0%             | 656   |  |
| HOUSTON                                        | 4,843               | 1.8%               | 2,463                      | 10.6%            | 602   |  |
| ABILENE-SWEETWATER                             | 308                 | 0.1%               | 144                        | 0.6%             | 554   |  |
| GREENWOOD-GREENVILLE                           | 234                 | 0.1%               | 99                         | 0.4%             | 499   |  |
| DALLAS-FT WORTH                                | 5,466               | 2.0%               | 2,110                      | 9.1%             | 457   |  |
| LITTLE ROCK-PINE BLUFF                         | 1,292               | 0.5%               | 496                        | 2.1%             | 454   |  |
| JACKSON, TN                                    | 167                 | 0.1%               | 58                         | 0.3%             | 414   |  |
| WACO-TEMPLE-BRYAN                              | 814                 | 0.3%               | 224                        | 1.0%             | 326   |  |
| SAN ANTONIO                                    | 1,990               | 0.7%               | 547                        | 2.4%             | 325   |  |
| FT SMITH                                       | 591                 | 0.2%               | 154                        | 0.7%             | 308   |  |
| MONTGOMERY                                     | 620                 | 0.2%               | 136                        | 0.6%             | 259   |  |
| AUSTIN, TX                                     | 1,243               | 0.5%               | 267                        | 1.2%             | 255   |  |
| GAINESVILLE                                    | 279                 | 0.1%               | 58                         | 0.3%             | 246   |  |
| HUNTSVILLE-DECATUR, FLORENCE                   | 894                 | 0.3%               | 125                        | 0.5%             | 166   |  |
| BIRMINGHAM                                     | 1,743               | 0.6%               | 238                        | 1.0%             | 161   |  |
| CORPUS CHRISTI                                 | 552                 | 0.2%               | 75                         | 0.3%             | 160   |  |
| MEMPHIS                                        | 1,740               | 0.6%               | 173                        | 0.7%             | 118   |  |
| CHATTANOOGA                                    | 834                 | 0.3%               | 83                         | 0.4%             | 117   |  |
| ATLANTA                                        | 4,887               | 1.8%               | 476                        | 2.1%             | 115   |  |
| OKLAHOMA CITY                                  | 1,583               | 0.6%               | 143                        | 0.6%             | 107   |  |
| CEDAR RAPIDS-WATERLOO & DUBUQUE                | 809                 | 0.3%               | 73                         | 0.3%             | 107   |  |
| FT MYERS-NAPLES                                | 853                 | 0.3%               | 74                         | 0.3%             | 103   |  |
| HARLINGEN-WESLACO-BROWNSVILLE-                 | 939                 | 0.3%               | 78                         | 0.3%             | 98    |  |
| HARRISBURG-YORK-LANCASTER-                     | 1,616               | 0.6%               | 133                        | 0.6%             | 97    |  |
| ORLANDO-DAYTONA BEACH-                         | 2,839               | 1.0%               | 170                        | 0.7%             | 71    |  |
| TAMPA-ST PETERSBURG, SARASOTA                  | 3,604               | 1.3%               | 212                        | 0.9%             | 69    |  |
| GREENVILLE-SPARTANBURG-                        | 1,881               | 0.7%               | 110                        | 0.5%             | 69    |  |
| ST LOUIS                                       | 2,972               | 1.1%               | 152                        | 0.7%             | 61    |  |
| NORFOLK-PORSTMOUTH-NEWPORT                     | 1,752               | 0.6%               | 84                         | 0.4%             | 57    |  |
| NASHVILLE                                      | 2,156               | 0.8%               | 101                        | 0.4%             | 55    |  |

2000 TravelScope<sup>®</sup> Profile of U.S. Travelers to Louisiana

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| 2000 DMA Brand Development Index for Louisiana |                     |                    |                            |                  |       |  |
|------------------------------------------------|---------------------|--------------------|----------------------------|------------------|-------|--|
| City (DMA) of origin                           | Population<br>(000) | Percent population | Total<br>Visitors<br>(000) | Percent visitors | INDEX |  |
| WASHINGTON, DC                                 | 5,450               | 2.0%               | 251                        | 1.1%             | 54    |  |
| LOUISVILLE                                     | 1,524               | 0.6%               | 61                         | 0.3%             | 47    |  |
| BALTIMORE                                      | 2,702               | 1.0%               | 95                         | 0.4%             | 42    |  |
| DENVER                                         | 3,300               | 1.2%               | 115                        | 0.5%             | 41    |  |
| SAN FRANCISCO-OAKLAND-SAN JOSE                 | 6,774               | 2.5%               | 220                        | 1.0%             | 38    |  |
| MIAMI-FT LAUDERDALE                            | 3,818               | 1.4%               | 105                        | 0.5%             | 32    |  |
| SAN DIEGO                                      | 2,890               | 1.1%               | 70                         | 0.3%             | 29    |  |
| LOS ANGELES                                    | 16,393              | 6.0%               | 370                        | 1.6%             | 27    |  |
| CHICAGO                                        | 9,018               | 3.3%               | 196                        | 0.8%             | 26    |  |
| MINNEAPOLIS-ST PAUL                            | 3,977               | 1.5%               | 87                         | 0.4%             | 26    |  |
| BOSTON                                         | 5,930               | 2.2%               | 119                        | 0.5%             | 24    |  |
| DETROIT                                        | 4,989               | 1.8%               | 69                         | 0.3%             | 16    |  |
| NEW YORK                                       | 19,289              | 7.0%               | 268                        | 1.2%             | 16    |  |
| PHILADELPHIA                                   | 7,311               | 2.7%               | 88                         | 0.4%             | 14    |  |

### CITY VOLUME ESTIMATES

City volumes from TravelScope may be underrepresented because travelers do not always mention the specific cities visited on their trips. TIA has developed a city volume estimation to account for this possible underrepresentation.

The adjusted city volume estimate is based on the assumption that visitors who do not write in city names visit cities in the same proportion as those who do provide city names. The additional volume is estimated by a) determining the number of person-trips without city designations then b) allocating those unidentified trips to cities proportionally based on the known visitor volumes.

| Non-resident Visitor Volume Estimates for Louisiana Cities                                                                                                    |          |           |                      |               |  |  |  |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-----------|----------------------|---------------|--|--|--|
| There were 17,427,000 non-resident person trips to Louisiana in 2000.<br>13,749,000 included city information.<br>3,678,000 did not include city information. |          |           |                      |               |  |  |  |
|                                                                                                                                                               |          | ume       | Estimated Additional | Adjusted City |  |  |  |
| City                                                                                                                                                          | Percent* | Count     | Volume **            | Volume        |  |  |  |
| New Orleans                                                                                                                                                   | 51.7%    | 7,113,000 | 1,901,526            | 9,014,526     |  |  |  |
| Shreveport-Bossier City                                                                                                                                       | 16.3%    | 2,243,000 | 599,514              | 2,842,514     |  |  |  |
| Baton Rouge                                                                                                                                                   | 9.2%     | 1,268,000 | 338,376              | 1,606,376     |  |  |  |
| Lafayette                                                                                                                                                     | 6.2%     | 849,000   | 228,036              | 1,077,036     |  |  |  |
| Lake Charles                                                                                                                                                  | 6.1%     | 842,000   | 224,358              | 1,066,358     |  |  |  |
| Monroe                                                                                                                                                        | 2.6%     | 356,000   | 95,628               | 451,625       |  |  |  |
| Alexandria                                                                                                                                                    | 1.5%     | 201,000   | 55,170               | 256,170       |  |  |  |

\* Percent of the 13,749,000 non-resident person-trips that listed a city.

\*\* Percent of person-trips to that city multiplied by the number of Louisiana trips that did not include a city designation (3,678,000).

| <b>Resident Visitor Volume Estimates for Louisiana Cities</b>                                                |          |           |                      |               |  |  |
|--------------------------------------------------------------------------------------------------------------|----------|-----------|----------------------|---------------|--|--|
| There were 5,727,000 resident person trips within Louisiana in 2000.<br>4,969,000 included city information. |          |           |                      |               |  |  |
|                                                                                                              |          |           | city information.    |               |  |  |
|                                                                                                              | Vol      | lume      | Estimated Additional | Adjusted City |  |  |
| City                                                                                                         | Percent* | Count     | Volume **            | Volume        |  |  |
| New Orleans                                                                                                  | 35.0%    | 1,740,000 | 265,300              | 2,005,300     |  |  |
| Shreveport-Bossier City                                                                                      | 5.2%     | 260,000   | 39,416               | 299,416       |  |  |
| Baton Rouge                                                                                                  | 21.1%    | 1,049,000 | 159,938              | 1,208,938     |  |  |
| Lafayette                                                                                                    | 10.2%    | 509,000   | 77,316               | 586,316       |  |  |
| Lake Charles                                                                                                 | 5.1%     | 253,000   | 38,658               | 291,658       |  |  |
| Monroe                                                                                                       | 3.5%     | 176,000   | 26,530               | 202,530       |  |  |
| Alexandria                                                                                                   | 7.1%     | 351,000   | 53,818               | 404,818       |  |  |

\* Percent of the 4,969,000 non-resident person-trips that listed a city.

**\*\*** Percent of person-trips to that city multiplied by the number of Louisiana trips that did not include a city designation (758,000).

NOTE: Information for Alexandria and Monroe are based on small sample sizes. Caution is recommended when using this information for strategic decisions.