

Louisiana Travel Pulse

March 2008

Produced by the Louisiana Office of Tourism

Analysis/Highlights:

- * The number of enplanements at New Orleans International Airport in January 2008 was over 20% higher than the same month in 2007, and less than one percent lower than January 2004. The monthly increase is primarily due to the BCS Championship Bowl held on January 7, 2008.
- * Statewide room demand, occupancy rate, and average daily rate were higher in January 2008 compared to last year. Results differed around the state where New Orleans, Baton Rouge, Lafayette, and Shreveport experienced increased room demand, while Monroe, Alexandria, and Lake Charles experienced slight declines. While not every metro area experienced an increase in month over month occupancy, it was the first time in 20 months that statewide month over month occupancy had increased.
- * Visitors to Louisiana's state parks and historic sites were up 3.5% but visitors to Jean Lafitte N.H.P. were down by over 20%. Visitors to both were still over 25% from the level experienced in January 2004.
- * Louisiana Tax Free Shopping sales increased by 80% in the fourth quarter of 2007 over the same period in 2006, but is still over 50% down from the same quarter in 2004.

Louisiana Tourism Trends

	January 2008	January 2007	% +/-	(Benchmark)			% +/-	% +/-
Airport Trends				YTD 2004	YTD 2007	YTD 2008	2007-2008	2004-2008
Airport Passenger Enplanements								
Louisiana Metro Airports Total	412,083	355,169	16.0%	402,879	355,169	412,083	16.0%	2.3%
New Orleans	340,832	283,681	20.1%	343,116	283,681	340,832	20.1%	-0.7%
Other Metro*	71,251	71,488	-0.3%	59,763	71,488	71,251	-0.3%	19.2%
* Note: Includes Baton Rouge, Shreveport, and Alexandria metropolitan airports.								
Louisiana Hotel/Motel Trends								
Rooms Sold	1,426,654	1,318,805	8.2%	1,282,651	1,318,805	1,426,654	8.2%	11.2%
Room Supply	2,375,468	2,253,142	5.4%	2,393,301	2,253,142	2,375,468	5.4%	-0.7%
Occupancy Rate	60.1%	58.5%	2.7%	53.6%	58.5%	60.1%	2.7%	12.1%
Average Daily Rate	\$99.31	\$89.55	10.9%	\$81.61	\$89.55	\$99.31	10.9%	21.7%
Louisiana Gaming Indicators								
Riverboat AGR*	\$136,660,239	\$136,147,370	0.4%	\$135,233,251	\$136,147,370	\$136,660,239	0.4%	1.1%
Non-Indian Land Based Casino GGR**	\$31,892,354	\$31,971,227	-0.2%	\$25,755,442	\$31,971,227	\$31,892,354	-0.2%	23.8%
Slots At Racetracks GGR***	\$31,222,950	\$28,796,852	8.4%	\$22,010,056	\$28,796,852	\$31,222,950	8.4%	41.9%
Total	\$199,775,543	\$196,915,449	1.5%	\$182,998,749	\$196,915,449	\$199,775,543	1.5%	9.2%
*Adjusted Gross Revenue **Gross Gaming Revenue from Harrah's New Orleans Casino ***Initiated in 2/2002 at Delta Downs, 5/2003 at Louisiana Downs, 12/2003 at Evangeline Downs, and 9/07 at the N.O. Fairgrounds.								
State Welcome Center Visitors	82,491	91,100	-9.5%	100,667	91,100	82,491	-9.5%	-18.1%
Notes: All centers are open except for the Slidell Center which closed for renovation following Labor Day 2007. N.O. Welcome Center operated on a restricted 5-day per week schedule in 2006 and the first half of 2007.								
Louisiana Parks Visitors								
Jean Lafitte NHP*	27,972	35,363	-20.9%	38,532	35,363	27,972	-20.9%	-27.4%
Louisiana State Parks and Historic Sites	70,645	68,243	3.5%	94,701	68,243	70,645	3.5%	-25.4%
* Recreational Visits								

National Tourism Trends

(Benchmark)

	January 2008	January 2007	% +/-	YTD 2004	YTD 2007	YTD 2008	% +/- 2007-2008	% +/- 2004-2008
U.S. Hotel/Motel Trends								
Rooms Sold			0.2%				0.2%	
Room Supply,			2.0%				2.0%	
Occupancy Rate	51.6%	52.5%	-1.8%	49.9%	52.5%	51.6%	-1.8%	3.4%
Average Daily Rate	\$105.64	\$99.95	5.7%	\$83.81	\$99.95	\$105.64	5.7%	26.0%
National Park Trends								
Recreational Visits (000)	10,861	11,421	-4.9%	11,115	11,421	10,861	-4.9%	-2.3%
U.S. Consumer Confidence Index Trend								
Index (1985=100)	87.9	110.2	-20.2%	97.7	110.2	87.9	-20.2%	-10.0%

(Sources: Louisiana Metropolitan Airports, Air Transport Association, Smith Travel Research, Louisiana State Police, Travel Industry Association of America, National Park Service, The Conference Board, and DCRT)

Glossary

Enplanements - a count of the number of passengers who board an airplane at one of Louisiana's metro airports.

Average Daily Rate (ADR) - Room revenue divided by rooms sold.

Occupancy - rooms sold divided by rooms available.

Rooms available (Room Supply) - The number of rooms times the number of days in the period.

Room revenue - total room revenue generated from the sale or rental of rooms.

Rooms sold (Room Demand) - The number of rooms sold (excludes complimentary rooms).

Adjusted Gaming Revenue - Net gains realized by a casino after payment of all cash paid out as losses to patrons.

Welcome Center Visitors - the number visitors who sign the register at Louisiana's 13 state welcome centers.

Recreational Visits - The entry of a person onto lands or waters administered by the NPS for recreational purposes

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Other Louisiana Tourism Trends

<u>Visitors</u>	3rd Quarter 2007	3rd Quarter 2006	% +/-	YTD 2004	YTD 2006	YTD 2007	% +/- 2006-2007	% +/- 2004-2007
U.S. Resident Visitors To La.*	6,260,000	6,200,000	1.0%	17,597,000	12,300,000	17,600,000	43.1%	0.0%
Canadian Resident Vis. To La.**	5,300	17,100	-69.0%	80,300	48,400	43,100	-11.0%	-46.3%

* 2007 domestic estimates are preliminary and subject to change. Hurricane related recovery travel is not included in 2006 estimates.
 ** The source for Canadian visitor estimates is Statistics Canada.

<u>Intent To Visit Benchmarks</u>								
MDRG Survey	January 2008	November 2007	August 2007	April 2007	January 2007	August 2006	May 2006	March 2006
Regional Sample	44.3%	44.7%	46.5%	60.2%	56.3%	50.7%	46.6%	49.8%
National Sample	23.2%	18.2%	19.0%	47.9%	33.9%	31.5%	30.8%	30.5%
TNS Survey	Fall 2006	Fall 2005	% +/-	Spring 2007	Spring 2006	Spring 2005	% +/- 2006-2007	% +/- 2005-2007
Regional Sample	43.0%	37.0%	16.2%	42.0%	31.0%	53.0%	71.0%	-20.8%
National Sample	13.0%	13.0%	0.0%	16.0%	11.0%	21.0%	90.9%	-23.8%

Notes: The results shown here are primarily taken from surveys in which the following question was asked of travelers:
 "How likely are you to take a trip to Louisiana during the next 12 months?" The choices are from 1 to 5 with 5 equals Extremely Likely and 1 equaling Not At All Likely. This is only a measurement of the attitude towards visiting La and should only be used as a gauge to measure a trend. This measurement is not used to estimate actual visitor volume.

<u>Hospitality Industry Employment</u>	2nd Quarter 2007	2nd Quarter 2006	% +/-	2nd Quarter 2004	2nd Quarter 2006	2nd Quarter 2007	% +/- 2006-2007	% +/- 2004-2007
				Units	Units	Units		
Arts, Entertainment, & Recreation	43,667	41,020	6.5%	1,506	1,539	1,513	-2.1%	0.5%
Accommodations and Food Services	162,563	155,217	4.7%	7,830	8,262	8,009	-5.2%	2.3%

Notes: Units or total units, referred to in the tables of this publication, represent the number of establishments in the industry.

<u>Audubon Golf Trail</u>	4th Quarter 2007	4th Quarter 2006	% +/-	YTD 2004	YTD 2006	YTD 2007	% +/- 2006-2007	% +/- 2004-2007
Number of Rounds Played	62,000	56,553	9.6%	224,609	277,758	291,509	5.0%	29.8%
Number of Courses Open	13	12	8.3%					

Notes: The TPC Louisiana reopened in July 2006; AGT also added Black Bear Golf Course and Atchafalaya Course at Idlewild in 2006, and the Wetlands Golf Course in Lafayette in July 2007.

(Benchmark)

<u>Louisiana Tax Free Shopping</u>	4th Quarter 2007	4th Quarter 2006	% +/-	YTD 2004	YTD 2006	YTD 2007	% +/- 2006-2007	% +/- 2004-2007
Number of Refund Transactions	7,221	3,779	91.1%	35,624	8,829	18,585	110.5%	-47.8%
Number of Sales	26,259	14,522	80.8%	153,262	41,343	75,172	81.8%	-51.0%
Retail Spending	\$6,320,873	\$3,251,804	94.4%	\$25,676,139	\$8,320,214	\$16,498,071	98.3%	-35.7%

Other National Tourism Trends

<u>Intent to Vacation</u>	December 2007	December 2006	% +/-	October 2007	August 2007	June 2007	April 2007	February 2006
Within the U.S.	35.0%	37.8%	-7.4%	37.4%	35.1%	35.4%	34.4%	34.2%
Foreign country	9.7%	9.0%	7.8%	9.3%	8.3%	9.2%	9.7%	8.2%

Notes: The source is the Conference Board's Consumer Confidence Survey. The survey measures the percent of respondents nationwide who intend to vacation within 6 months.

<u>Hospitality Industry Employment</u>	December 2007	December 2006	% +/-	October 2007	August 2007	June 2007	April 2007	February 2007
Accommodations and Food Service (Thousands)	11,510	11,194	4.2%	11,665	11,971	11,921	11,477	11,133

Notes: The source is the U.S. Bureau of Labor Statistics and the Travel Industry of America

(Sources: University of New Orleans, Statistics Canada, TIA, The Conference Board, La. Dept. of Labor, U.S Bureau Of Labor Statistics, Louisiana Tax Free Shopping, and DCRT.)