



# Louisiana Travel Pulse

## Fall 2002

The Louisiana Travel Pulse is a seasonal industry travel barometer designed to present recent trends in travel industry performance. This issue’s emphasis is on the **Fall 2002** season (**September-November**). Performance measures are primarily presented to show differences in levels from one year ago. However, much of the following data also illustrates the most recent twelve to eighteen-month trend as well. Some indicators also show comparisons of national and/or regional trends when data is available. The following Pulse has two primary parts. The first part shows statewide indicators for hotels, airports, visitor centers, riverboat gaming, parks, and attractions. The second part of the Pulse contains a regional analysis of the **Fall** season using some of these same indicators.

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

### Fall 2002 Performance At-A-Glance

- Hotel Occupancy Rate: +11.0%
- Hotel ADR: -0.4%
- Hotel Room Supply: +3.0%
- Hotel Room Demand: +14.1%
- State Visitor Center Visitors: -9.0%
- Riverboat Gross Revenue: -0.3%
- Airport Enplanements: +13.8%
- State Parks Visitors: -9.8%
- Local Information Center Visitors: -13.1%
- Attractions Visitors: -13.1%

*Note: These Louisiana indicators show the percentage difference from Fall 2001 to Fall 2002.*

Table of Contents	
Hotel Occupancy Rate.....	Page 2
Hotel Average Daily Rate .....	Page 3
Hotel Room Supply.....	Page 4
Hotel Room Demand.....	Page 4
State Visitor Centers.....	Page 5
Riverboat Gaming .....	Page 6
Airport Traffic.....	Page 7
State and National Parks .....	Page 8
Local Information Centers.....	Page 9
Attractions .....	Page 10
Regional Trends .....	Page 11

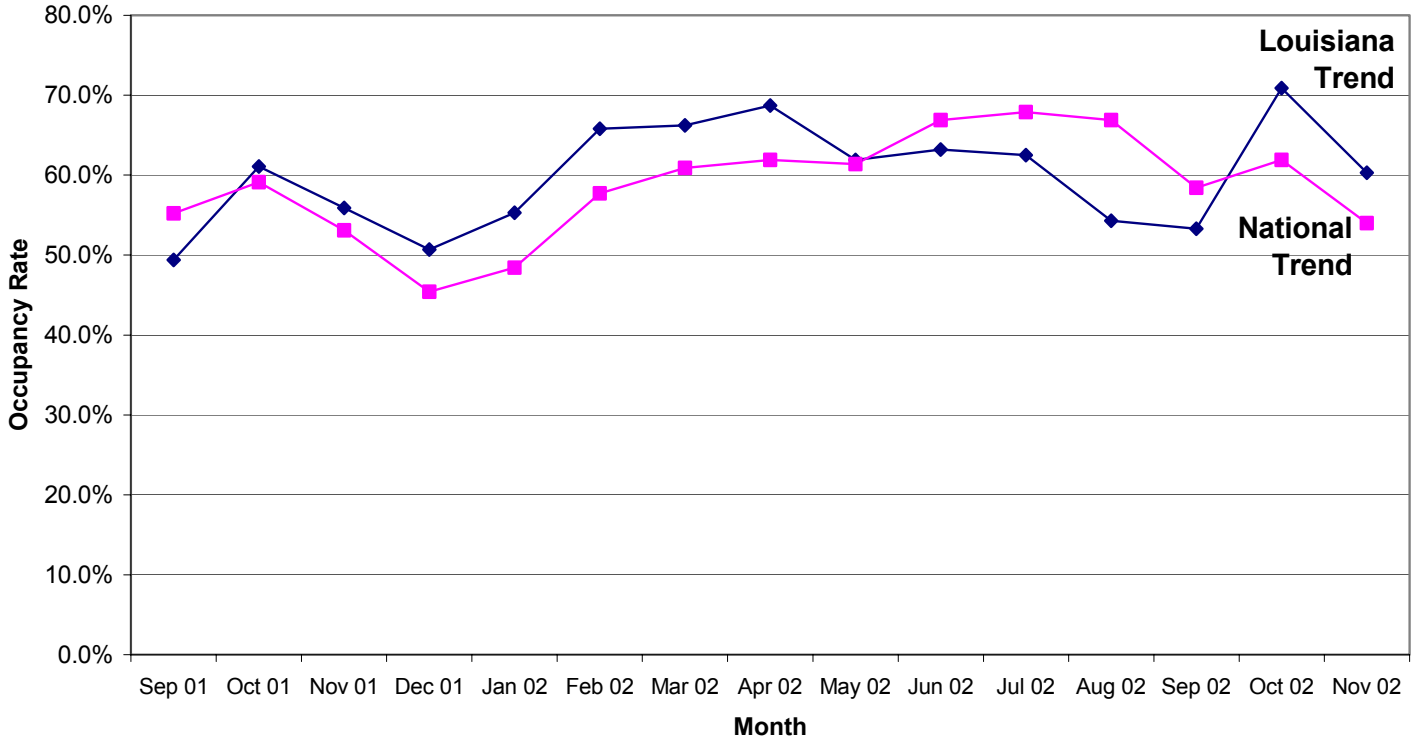
### Factors Influencing Fall 2002 Travel To Louisiana

Nationwide leisure travel patterns characterized by close-to-home trips (particularly to visit friends and relatives) continue through the end of 2002 and are expected to prevail in 2003. The War on Terrorism continues, however, no major incidents occurred in the U.S. Declining relationships between Iraq and the U.S. continue through the end of 2002... Consumer confidence declines in September and October and continues to be lower than the previous year... The average price of gasoline nationwide shows almost no change from September through November... Domestic airline traffic finally show year-to-year increases compared to the severely depressed figures of the Fall of 2001... Business travel, which represents a third or more of industry income, continues to be a major disappointment as corporate America continues to reduce travel and entertainment expenditures... Hurricane Lily and a tropical storm wreaked havoc in Louisiana’s coastal zone, causing the temporary closures of many attractions, parks, and visitor information centers.

Previous copies of the Louisiana Travel Pulse are available on the web at: [www.latour.lsu.edu](http://www.latour.lsu.edu)

# 1. Hotel Trends – Occupancy Rate

## Fall 2002 – Occupancy Rate Trend



### Fall 2002 Season

**Louisiana hotel/motel occupancy: 61.5%**  
 % difference from prior year: +11.0%  
 % difference from 5 years ago: -7.9%

**U.S. hotel/motel occupancy: 58.1%**  
 % difference from prior year: +4.1%  
 % difference from 5 years ago: -9.3%

During the Fall occupancy rose in Louisiana and the U.S. due to depressed rates the previous Fall when most of America began to feel a large decline in travel due to the September 11, 2001 terrorist attacks.

### 2002 Performance (January-November)

**Louisiana hotel/motel occupancy: 61.9%**  
 % difference from prior year: -0.2%  
 % difference from 5 years ago: -9.5%

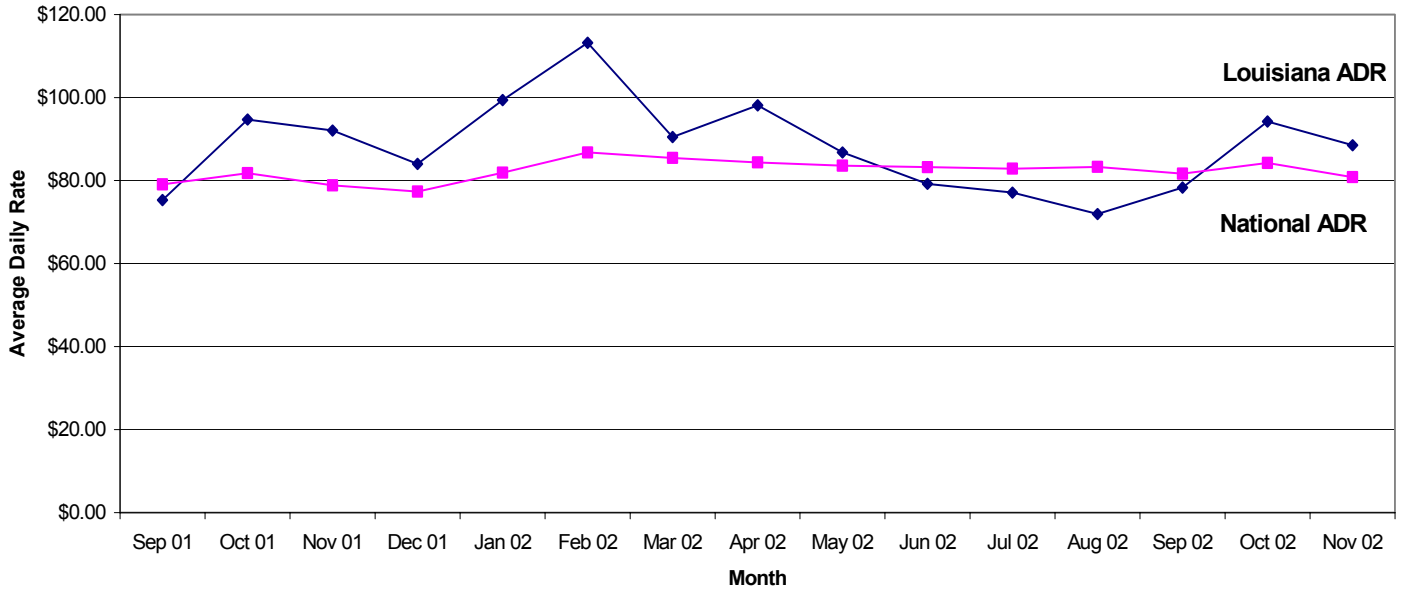
**U.S. hotel/motel occupancy: 60.5%**  
 % difference from prior year: -1.1%  
 % difference from 5 years ago: -7.5%

Less than half of the fifty states had an increase in occupancy last year (20 states), and most increases were very modest. Louisiana experienced almost no change (-0.2%) in occupancy even though the number of rooms available grew by 4.1% in the last year. Room demand in Louisiana grew by 3.8% with only five other states posting higher increases (Delaware, Mississippi, South Dakota, Utah, and Wyoming).

Source: Smith Travel Research

## 2. Hotel Trends – Average Daily Rate

### Fall 2002 – Average Daily Rate Trend



#### Fall 2002 Season

**Louisiana hotel/motel average daily rate: \$87.00**

% difference from prior year: -0.4%

% difference from 5 years ago: +1.0%

**U.S. hotel/motel average daily rate: \$82.20**

% difference from prior year: +2.9%

% difference from 5 years ago: +4.0%

While Louisiana's average daily rate for the Fall season was the lowest in four years, there was no appreciable change from 2001. The highest on record was the Fall 2000 average of \$97.44.

#### 2002 Performance (January-November)

**Louisiana hotel/motel average daily rate: \$88.30**

% difference from prior year: -0.9%

% difference from 5 years ago: +5.4%

**U.S. hotel/motel average daily rate: \$83.53**

% difference from prior year: -1.8%

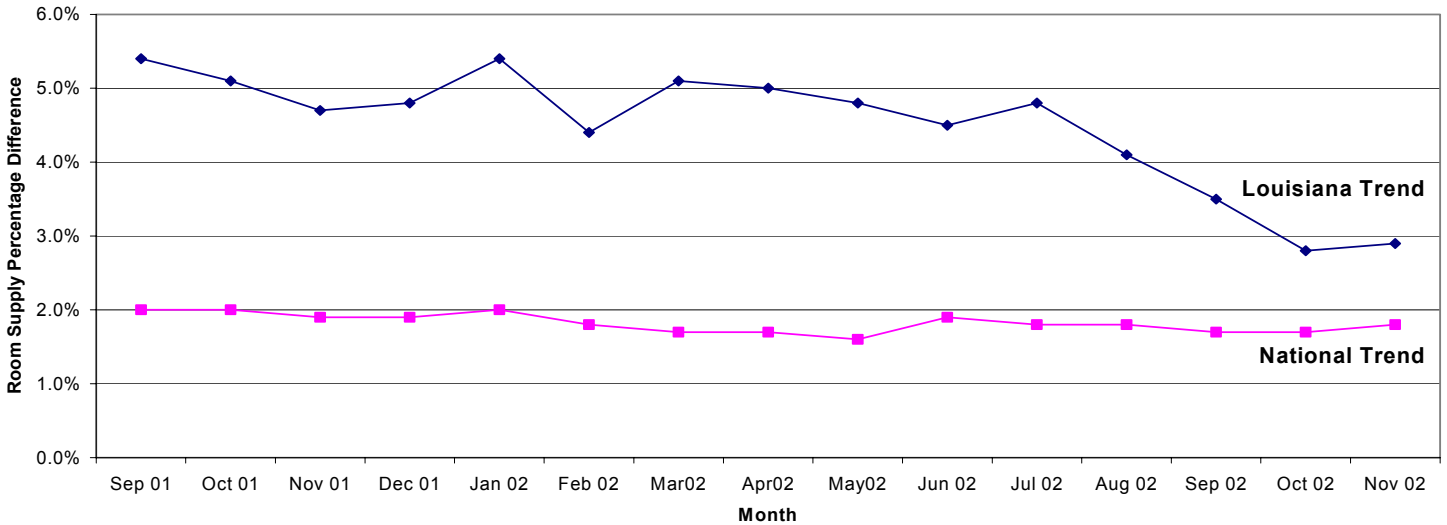
% difference from 5 years ago: +4.2%

Louisiana's current average daily rate in 2002 is the 12<sup>th</sup> highest among all states in the U.S. Overall hotel performance is measured by the actual number of rooms sold. In 2002 Louisiana has sold 3.8% more room nights compared to 2001. Nationwide, the growth is much more modest at +0.6%. Louisiana's growth in hotel rooms is also greater than the national growth rate. Louisiana added 4.1% more rooms last year while the U.S. total increased by only 1.8%.

Source: Smith Travel Research

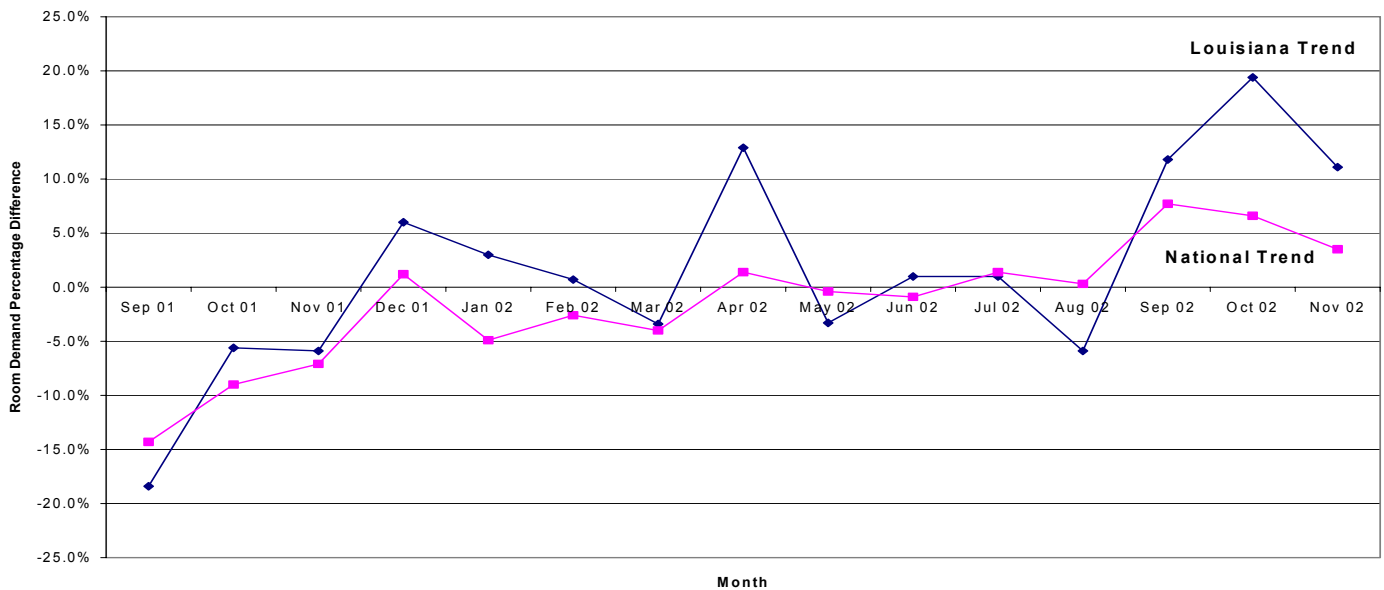
### 3. Hotel Trends – Room Supply

#### Fall 2002 – Room Supply Trend



### 4. Hotel Trends – Room Demand

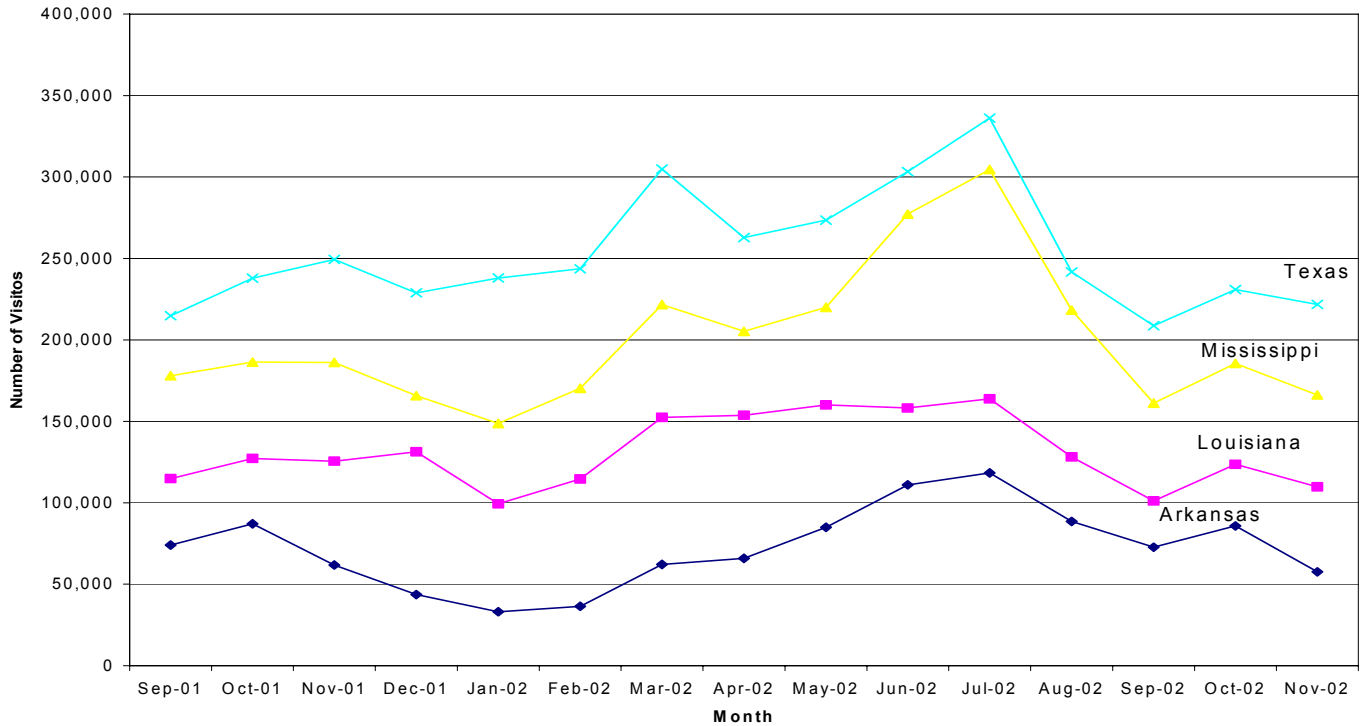
#### Fall 2002 – Room Nights Sold Trend



Double digit increases in room nights sold during each month in the Fall of 2002 was the result of the depressed travel experienced during the previous Fall from the September 11, 2001 terrorist events. However, they were still well below the number of room nights sold in 2000. For example, the number of room nights sold in Louisiana in September 2002 was 1,131,661 which was 11.5% higher than the 1,015,331 room nights sold in September 2001 but 18.7% lower than the 1,215,872 room nights sold during September 2000. October and November room nights sold were actually higher in 2002 than the same months in both 2001 and 2000. Increased convention business in New Orleans, as well as, displaced hurricane victims and emergency workers were the primary reasons for the higher demand at the end of 2002. The resurgence is not an indicator of the future since 2003 is predicted to be a less than normal year for convention business in New Orleans.

## 5. State Information Center Visitors

### Fall 2002 State Welcome Center Visitor Trend



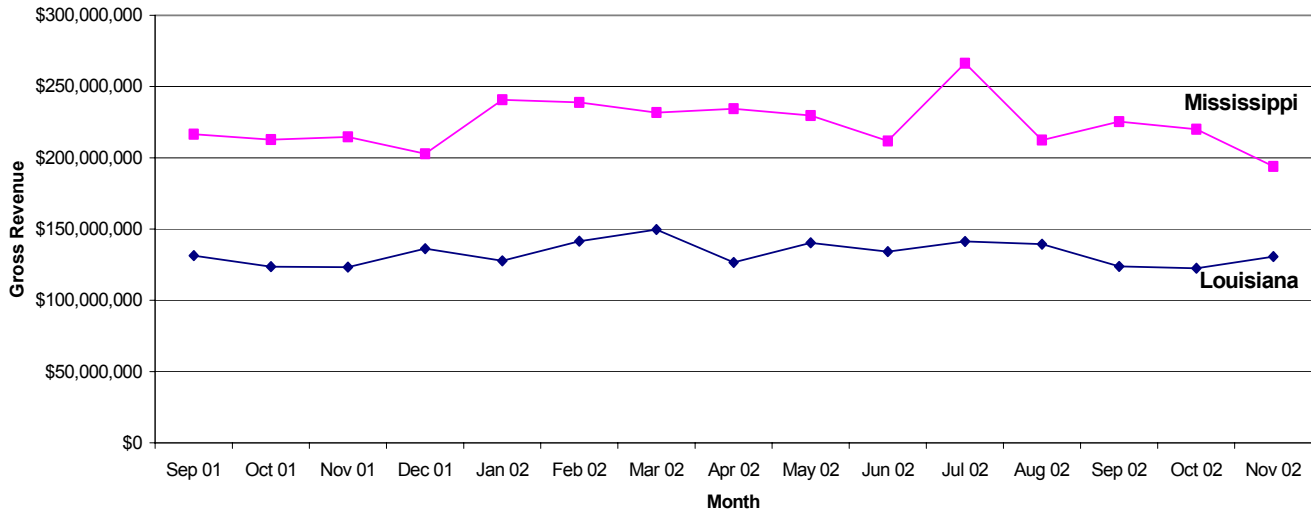
	Arkansas	Louisiana	Mississippi	Texas
<b>Fall 2002 Trend*</b>				
Number of Visitors	216,216	334,568	512,942	661,449
% difference from prior year	-3.1%	-9.0%	-6.8%	-5.8%
<b>2002 Year-to-Date Trend (January thru November)</b>				
Number of Visitors	816,615	1,465,063	2,278,870	2,865,333
% difference from prior year	-1.3%	-2.0%	+1.6%	+3.1%
* While each state uses a different method to calculate welcome center visitors, there have been no changes to the methods used over the last 15 months.				
Source: Louisiana Office of Tourism				

### Welcome Center Facts

- According to the results of Louisiana’s most recent survey of welcome center visitors, those visitors who stopped at the welcome center in the last quarter of 2002 spent a total of \$61.9 million in Louisiana on their trip. Over \$13 million of which was attributed to information received at the center because they changed their plans or stayed longer.
- Louisiana will have two new welcome centers due to open later this year: 1) I-49, Boyce Exit – north of Alexandria, and 2) I-10, Butte LaRose Exit – within the Atchafalaya Basin.

## 6. Riverboat Gaming

### Fall 2002 – Gross Revenue Trend

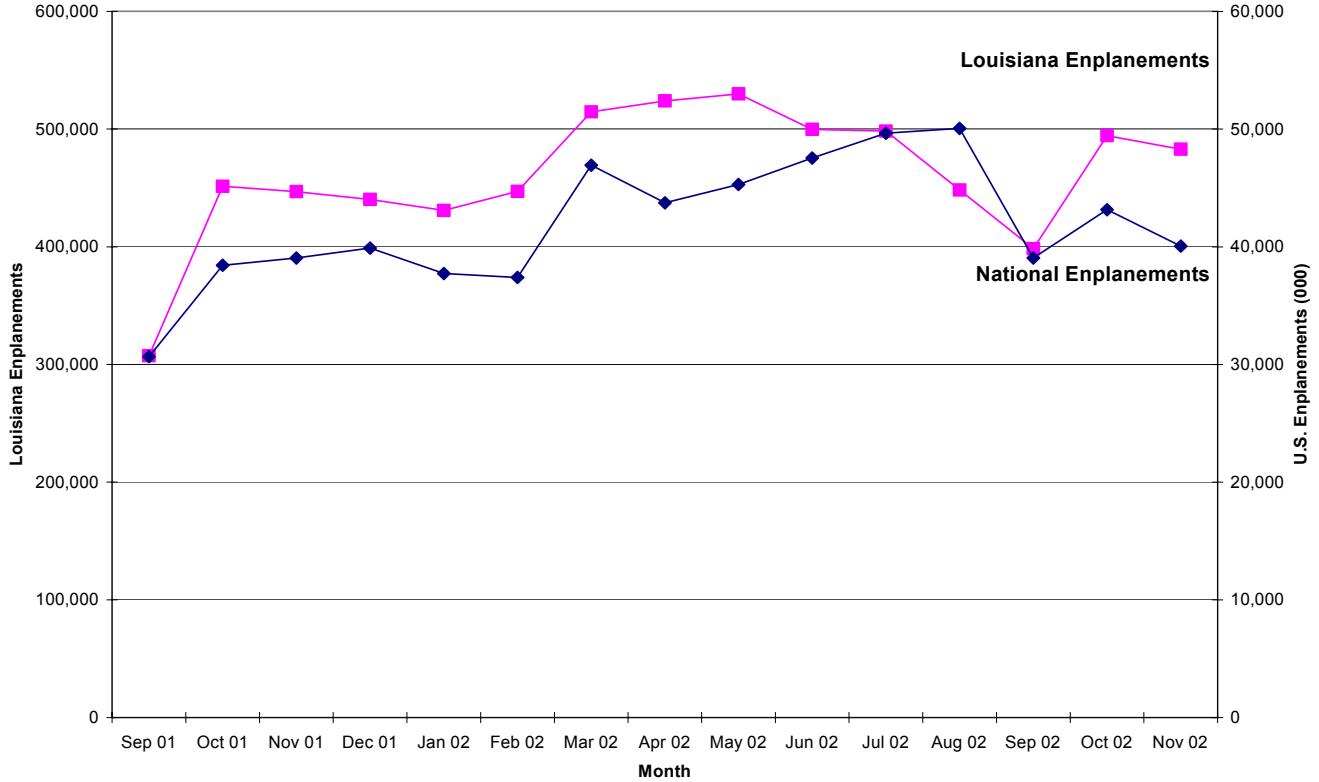


	Louisiana	Mississippi
<b>Fall 2002 Season</b>		
Total Gross Revenue	\$377,088,974	\$639,340,130
% difference from prior year	-0.3%	-0.7%
% difference from 5 years ago	+18.2%	+24.1%
<b>2002 Year-to-Date (January thru November)</b>		
Total Gross Revenue	\$1,477,918,311	\$2,505,387,703
% difference from prior year	-0.7%	+0.3%
% difference from 5 years ago	+21.8%	+25.1%
Sources: Louisiana State Police, and Mississippi State Tax Commission ( <a href="http://www.mstc.state.ms.us/index.html">http://www.mstc.state.ms.us/index.html</a> )		

- The total gross revenue for Louisiana’s land based casino in New Orleans for the Fall of 2002 was \$68,122,201, 13.2% greater than the Fall 2001.
  - Through the first 11 months of 2002, the total gross revenue for Louisiana’s land based casino increased by 10.1% over the same period of 2001.
  - Nearly 1,500 slot machines were added to the Delta Downs Racetrack in Vinton in February 2002. Since that time the number customers and the gross gaming revenue have steadily increased at the racetrack. The racetrack’s slot operation has become the state’s sixth-highest-grossing non-Indian casino. For the year, the gross gaming revenue from the slot machines amounted to \$105,155,918. This additional source of gaming expenditures probably contributed to the –0.7% decline shown in the previous box from all riverboat gaming revenue during that same period.
- Source: Louisiana Gaming Control Board (<http://www.dps.state.la.us/lgcb/welcome.html>)

## 7. Airport Passenger Enplanements

### Fall 2002 Enplanements Trend



#### Fall 2002 Season

**Louisiana Airport Enplanements: 1,375,662**

% difference from prior year: +13.8%

% difference from five years ago: -5.5%

**U.S. Airport Enplanements: 122.2 million**

% difference from prior year: 13.0%

% difference from five years ago: -8.9%

The devastating effects of September 11, 2001 on air travel is still being felt by the commercial airlines even though a comparison between the two past Fall seasons indicate growth. A look back five years ago gives a better picture than a comparison to the Fall 2001 season.

#### 2002 Performance (January-November)

**Louisiana Airport Enplanements: 5,268,305**

% difference from prior year: -4.2%

% difference from five years ago: -1.0%

**U.S. Airport Enplanements: 510.9 million**

% difference from prior year: -5.9%

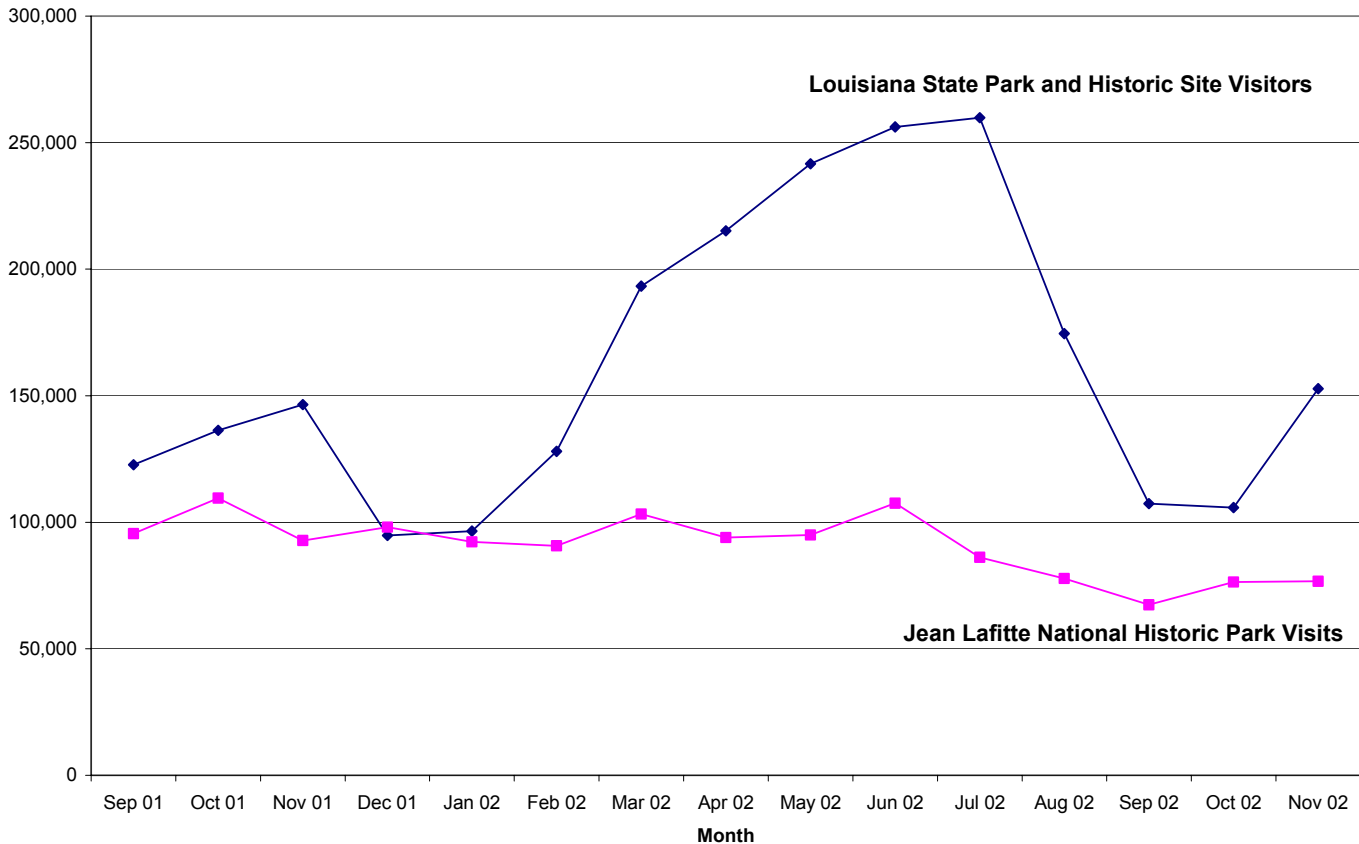
% difference from five years ago: -5.7%

U.S. passenger traffic is more than 5 percent below the same level as it was five years ago. Some analysts are projecting a \$7 billion loss in business for the airline industry. A recovery during 2003 is dependent on increased international travel and business air travel.

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

## 8. State and National Park Visitors

### Fall 2002 Park Visitors Trend



#### Fall 2002 Season

Louisiana State Parks and Historic Site Visitors: 365,924  
 % difference from prior year: -9.8%

Jean Lafitte National Historical Park Visits: 220,398  
 % difference from prior year: -26.0%

#### 2002 Year-To-Date Performance (January-November)

Louisiana State Parks and Historic Site Visitors: 1,931,129  
 % difference from prior year: +6.9%

Jean Lafitte National Historical Park Visits: 966,847  
 % difference from prior year: -25.4%

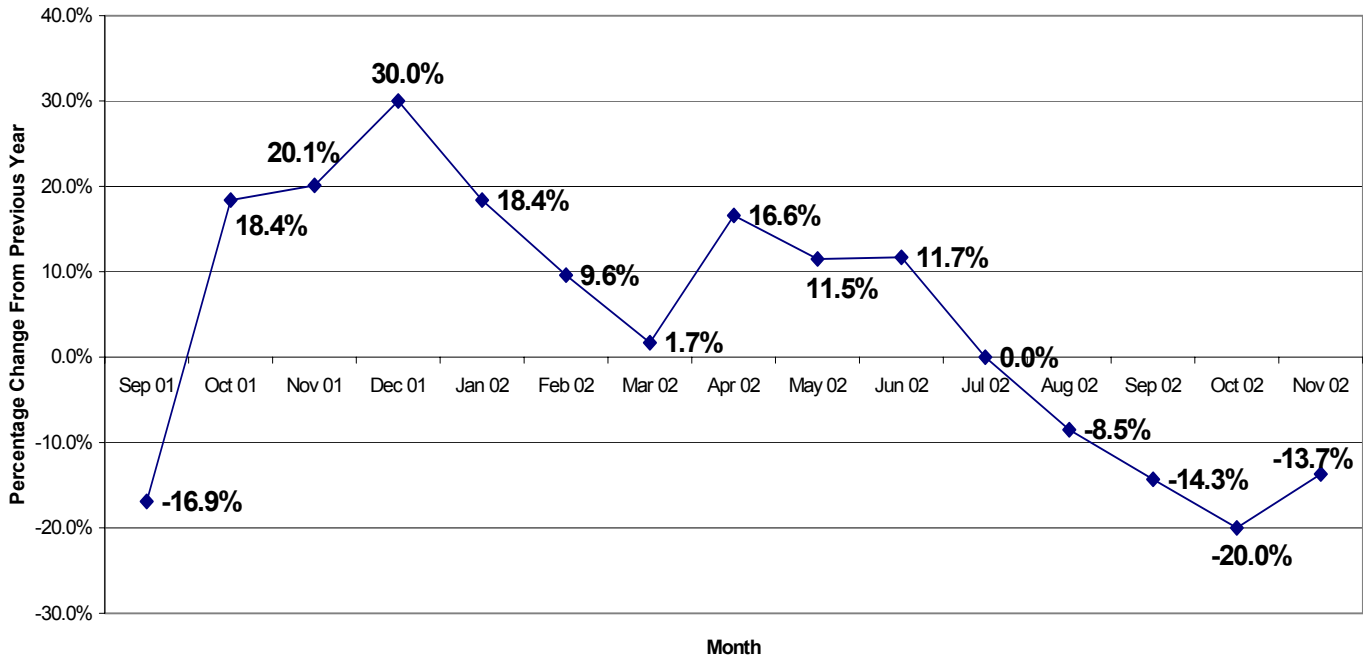
Louisiana currently has 17 state parks, 16 state historic sites and State Arboretum. Jean Lafitte National Historical Park currently has six units located around the state.

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



## 9. Local Tourist Information Centers

### Fall 2002 – Tourist Center Visitor Trend



#### Fall 2002 Season

Louisiana local tourist information center visitors: 85,160

% difference from prior year: -13.1%

During the Fall season, nine reported increased visitor volume and sixteen recorded a decrease in visitors compared to the previous Fall season.

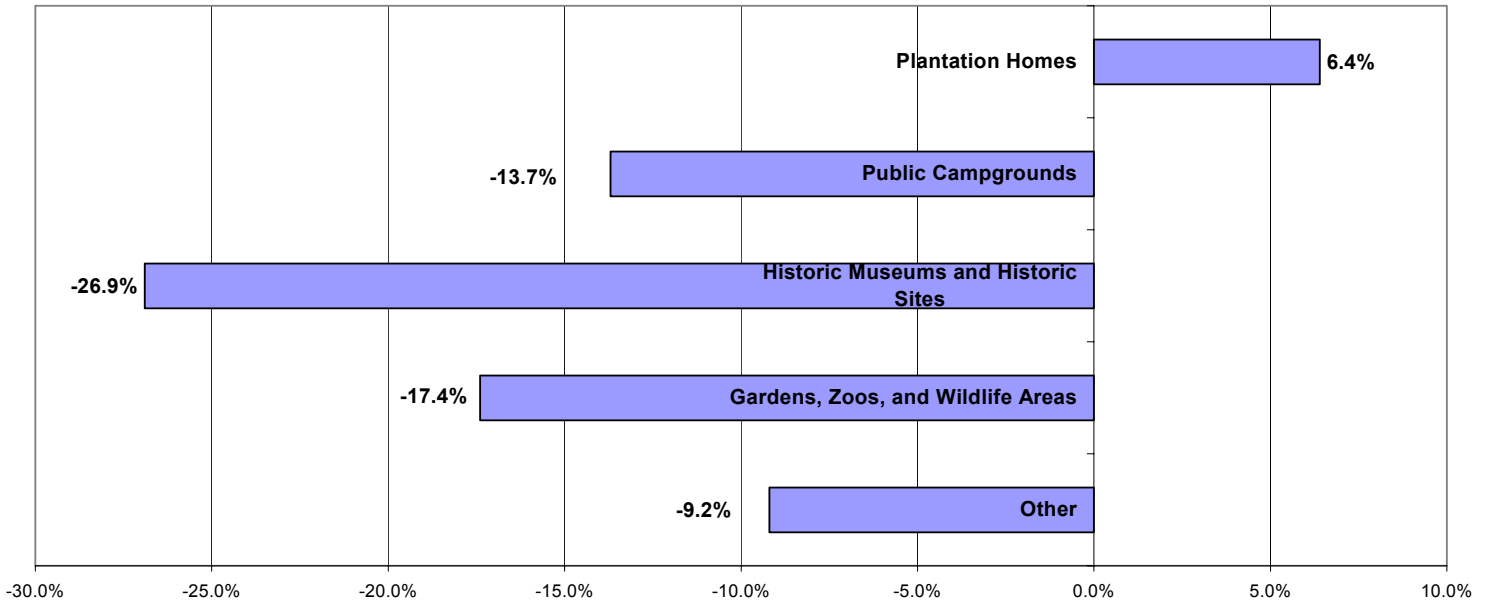
Source: Louisiana Office of Tourism. Local information center visitors are operated by municipal and parish tourist bureaus throughout Louisiana. Most use registration sheets to record the volume of visitors who enter the centers for travel information.

**“The convention and visitor bureau industry looks at 2003 with guarded optimism, but with full awareness that a continually delayed economic recovery in many parts of the world and threats of war and/or future incidents of terrorism could continue to deepen an already depressed corporate travel market. Corporate business has been severely curtailed over the last 18 months and, at best, only a modest recovery is expected throughout 2003 and the first quarter of 2004. However, given stability in the political and economic realms, the association and leisure travel markets should continue to gain on the momentum established in the latter part of 2002.”**

Source: State of the Convention and Visitors Bureaus Industry, 2003, February 18, 2003, By IACVB President & CEO, Michael D. Gehrisch (<http://www.iacvb.org/iacvb/index.asp>)

## 10. Attractions Visitors

**Fall 2002 - Visitor Trend By Category**  
**Percentage Change From Previous Year In The Number Of Visitors**



### Fall 2002 Season

The Louisiana Office of Tourism received visitor counts from 85 attractions across the state. Numbers were received from 5 plantation homes, 16 public campgrounds, 39 historical museums and historic sites, 4 gardens, zoos and wildlife areas, and 21 other attractions. The total number of visitors to Louisiana's attractions declined by 13.1% during the Fall 2002 Season (September-November) compared to the previous Fall season. The primary reason for this sharp decline is the resulting temporary closures caused by Hurricane Lily and a tropical storm which came through Louisiana in October. Particularly hardest hit were those attractions in Cajun Country where 19 of the 21 attractions that were surveyed had declines in attendance. As seen on page 12, Cajun Country visitation to attractions, parks and museums declined by 30.4%. The storms adversely affected other tourism indicators as well, such as local information centers (-13.1%), state parks (-9.8%), and state welcome centers (-9.0%). On the other hand, hotel-motel occupancy during September and October grew in certain areas because of displaced residents, clean-up crews, and others needing overnight accommodations due to the storms.

	Fall 2002	Summer 2002	Spring 2002	Winter 2002	Fall 2001
Number of Sites w/increased attendance	32	38	41	52	42
Number of Sites w/decreased attendance	53	46	39	28	35
Percentage difference from previous year*	-13.1	-1.2%	0.0%	+4.8%	-2.9%

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

## 11. Regional Trends - Fall

<b>Greater New Orleans</b>	<b>2002</b>	<b>2001</b>	<b>% +/-</b>
New Orleans International Airport			
Passenger Enplanements.....	1,105,325.....	980,537.....	+12.7%
New Orleans Hotel-Motel Occupancy Rate			
September .....	51.7%.....	46.6.....	+10.9%
October.....	72.7%.....	64.6%.....	+12.5%
November.....	64.0%.....	59.5%.....	+7.6%
New Orleans Visitor Center.....	24,290.....	28,691.....	-15.3%
Slidell Visitor Center .....	78,719.....	82,485.....	-4.6%
Kentwood Visitor Center .....	29,042.....	27,539.....	+5.5%
Pearl River Center.....	32,136.....	37,741.....	-14.9%
Parks, Attractions, Museums .....	674,382.....	777,291.....	-13.2%

<b>Plantation Country</b>	<b>2002</b>	<b>2001</b>	<b>% +/-</b>
Baton Rouge Metro Airport Airport			
Passenger Enplanements .....	97,151.....	76,318.....	+27.3%
Baton Rouge Hotel/Motel Occupancy Rate			
September .....	59.1%.....	51.0%.....	+15.9%
October.....	73.6%.....	58.8%.....	+25.2%
November.....	62.0%.....	52.8%.....	+17.4%
State Capitol Visitor Center .....	22,132.....	23,900.....	-7.4%
St. Francisville Visitor Center.....	10,635.....	11,385.....	-6.6%
Parks, Attractions, & Museums .....	99,107.....	93,915.....	+5.5%

<b>Cajun Country</b>	<b>2002</b>	<b>2001</b>	<b>% +/-</b>
Lafayette Regional Airport			
Passenger Enplanements.....	36,262.....	36,767.....	-1.4%
Lake Charles Regional Airport			
Passenger Enplanements.....	11,964.....	11,133.....	+7.5%
Lafayette Hotel-Motel Occupancy Rate			
September .....	58.5%.....	58.8%.....	-0.5%
October.....	89.8%.....	63.6%.....	+41.2%
November.....	75.5%.....	52.8%.....	+43.0%

Lake Charles Hotel-Motel Occupancy Rate

September .....	56.3%	55.9%	+0.7%
October.....	71.3%	62.9%	+13.4%
November.....	54.8%	60.0%	-8.7%

Vinton Visitor Center.....	39,602	41,931	-5.6%
----------------------------	--------	--------	-------

Parks, Attractions, & Museums .....	122,259	175,776	-30.4%
-------------------------------------	---------	---------	--------

<b>Crossroads</b>	<b>2002</b>	<b>2001</b>	<b>%+/-</b>
-------------------	-------------	-------------	-------------

England International Airport

Passenger Enplanements.....	26,789	23,202	+15.5%
-----------------------------	--------	--------	--------

Alexandria Hotel-Motel Occupancy Rate

September .....	48.2%	45.8%	+5.2%
October.....	61.1%	47.8%	+27.8%
November.....	50.2%	50.5%	-0.6%

Vidalia Visitor Center.....	6,735	6,390	+5.4%
-----------------------------	-------	-------	-------

Parks, Attractions, & Museums .....	52,048	52,017	+0.1%
-------------------------------------	--------	--------	-------

<b>Sportsman's Paradise</b>	<b>2002</b>	<b>2001</b>	<b>%+/-</b>
-----------------------------	-------------	-------------	-------------

Shreveport Regional Airport

Passenger Enplanements.....	75,240	62,138	+21.1%
-----------------------------	--------	--------	--------

Monroe Regional Airport

Passenger Enplanements.....	22,931	18,553	+23.6%
-----------------------------	--------	--------	--------

Shreveport Hotel-Motel Occupancy Rate

September .....	57.8%	50.7%	+14.0%
October.....	62.9%	58.4%	+7.7%
November.....	53.9%	52.8%	+2.1%

Monroe Hotel-Motel Occupancy Rate

September .....	62.5%	59.1%	+5.8%
October.....	61.7%	61.2%	+0.8%
November.....	55.3%	58.7%	-5.8%

Greenwood Visitor Center .....	48,350	54,032	-10.5%
--------------------------------	--------	--------	--------

Mound Visitor Center .....	42,927	53,484	-19.7%
----------------------------	--------	--------	--------

Parks, Attractions, and Museums.....	231,071	257,582	-10.3%
--------------------------------------	---------	---------	--------

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