



Louisiana Travel Pulse

Introduction

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 Winter 2001-02 season (December-February). 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 comparison 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 Winter 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.

Winter 02 Performance At-A-Glance

- Hotel Occupancy Rate: -1.9%
- Hotel ADR: +6.2%
- Hotel Room Supply: +4.4%
- Hotel Room Demand: +3.0%
- State Visitor Center Visitors: +9.5%
- Riverboat Gross Revenue: +5.4%
- Airport Enplanements: -8.7%
- State Parks Visitors: +41.7%
- Local Information Center Visitors: +20.3%
- Attractions Visitors: +4.8%

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

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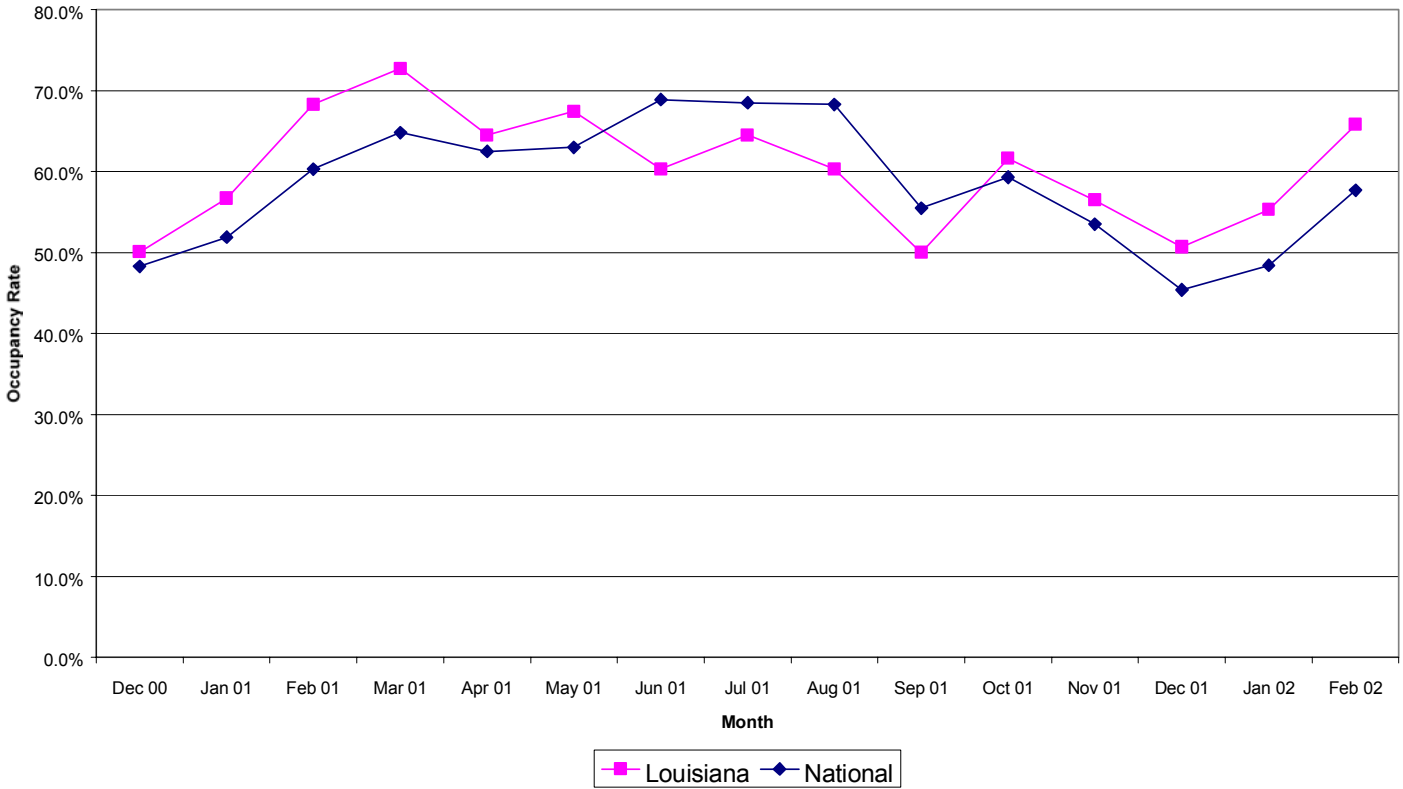
Factors Influencing Winter 02 Travel To Louisiana

September 11th terrorist events continue to affect travel and tourism during the Fall 2001 season and beyond....November-December holiday travel incentives including discounts were offered by many industry sectors including hotels, airlines, and attractions to spur consumers to travel...Heading into December the TIA Travel Confidence Survey shows a slight increase in travel intentions for the next six months....Louisiana's Leisure Tracking Survey conducted by The Marketing Workshop shows no adverse changes in Louisiana's markets regarding travel intentions....Louisiana's Fall advertising campaign targets close-in markets and successfully generates a high inquiry response...The Conference Board's Consumer Confidence Index, which declined dramatically for September, October, and November, rebounded in December....Louisiana hosts Super Bowl XXXVI and experiences a very busy Mardi Gras season.

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

1. Hotel Trends – Occupancy Rate

Winter 2001-02 – Occupancy Rate



Winter 2002 Season

Louisiana hotel/motel occupancy: 57.3%

% difference from prior year: -1.9%

% difference from 5 years ago: -5.6%

U.S. hotel/motel occupancy: 50.5%

% difference from prior year: -5.6%

% difference from 5 years ago: -7.8%

Louisiana’s monthly occupancy rate continues to be higher in most months (particularly non-summer months) than the U.S. average. Louisiana had the 11th highest occupancy among all states in calendar year 2001. The decreasing occupancy levels in recent years have been due to the rising supply of new rooms available.

2001 Performance (January-December)

Louisiana hotel/motel occupancy: 61.3%

% difference from prior year: -4.4%

% difference from 5 years ago: -9.4%

U.S. hotel/motel occupancy: 60.1%

% difference from prior year: -5.7%

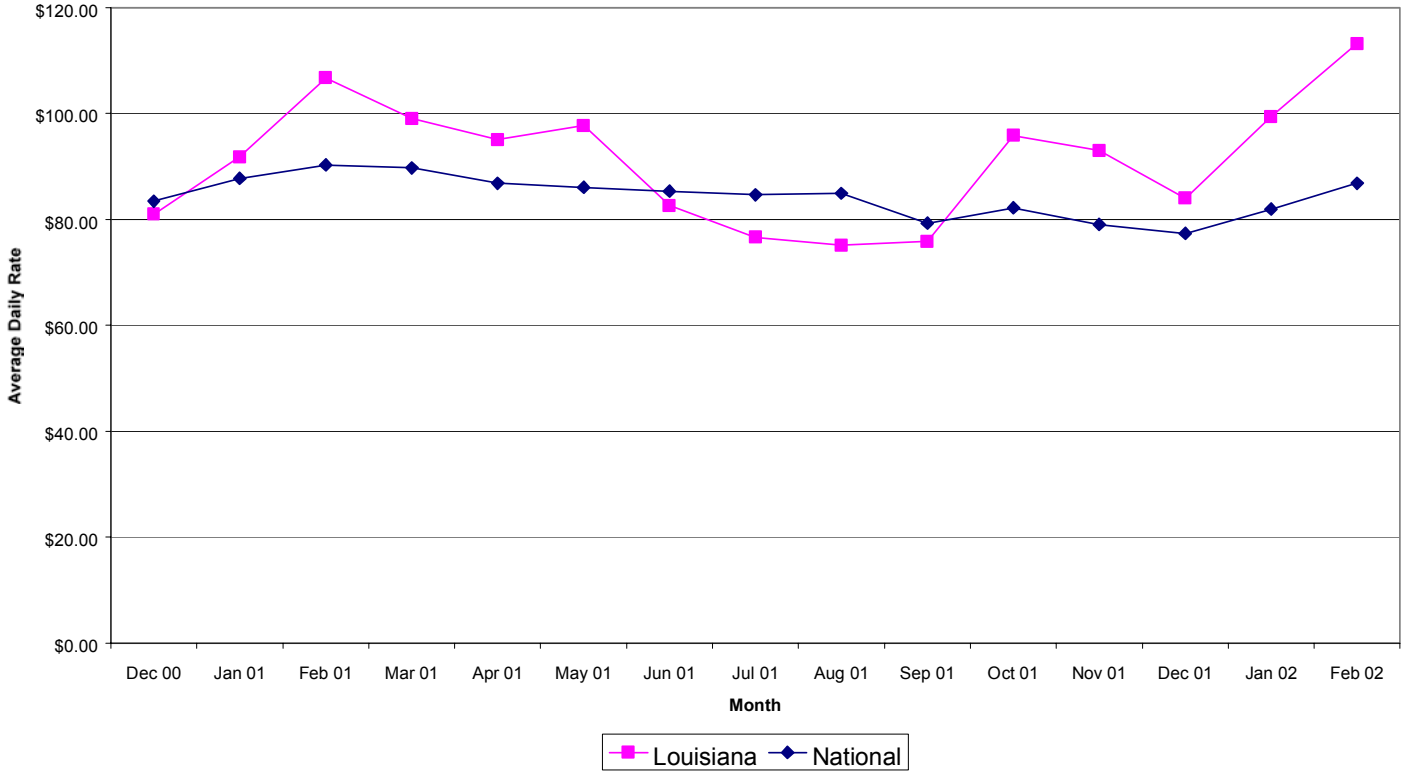
% difference from 5 years ago: -6.8%

There are 5.7 percent more rooms available than last year in Louisiana, and this increase in supply is reflected in a lower occupancy rate. Louisiana’s occupancy rate for 2001 was 4.4% lower than 2000.

Source: Smith Travel Research

2. Hotel Trends – Average Daily Rate

Winter 2001-02 – Average Daily Rate



Winter 2002 Season

Louisiana hotel/motel average daily rate: \$98.90

% difference from prior year: +6.2%

% difference from 5 years ago: +21.5%

U.S. hotel/motel average daily rate: \$82.05

% difference from prior year: -5.8%

% difference from 5 years ago: +6.7%

Louisiana's ADR is currently higher than the U.S. average during most of the Fall, Winter, and Spring months.

2001 Performance (January-December)

Louisiana hotel/motel average daily rate: \$90.05

% difference from prior year: -1.3%

% difference from 5 years ago: +13.4%

U.S. hotel/motel average daily rate: \$84.85

% difference from prior year: -1.4%

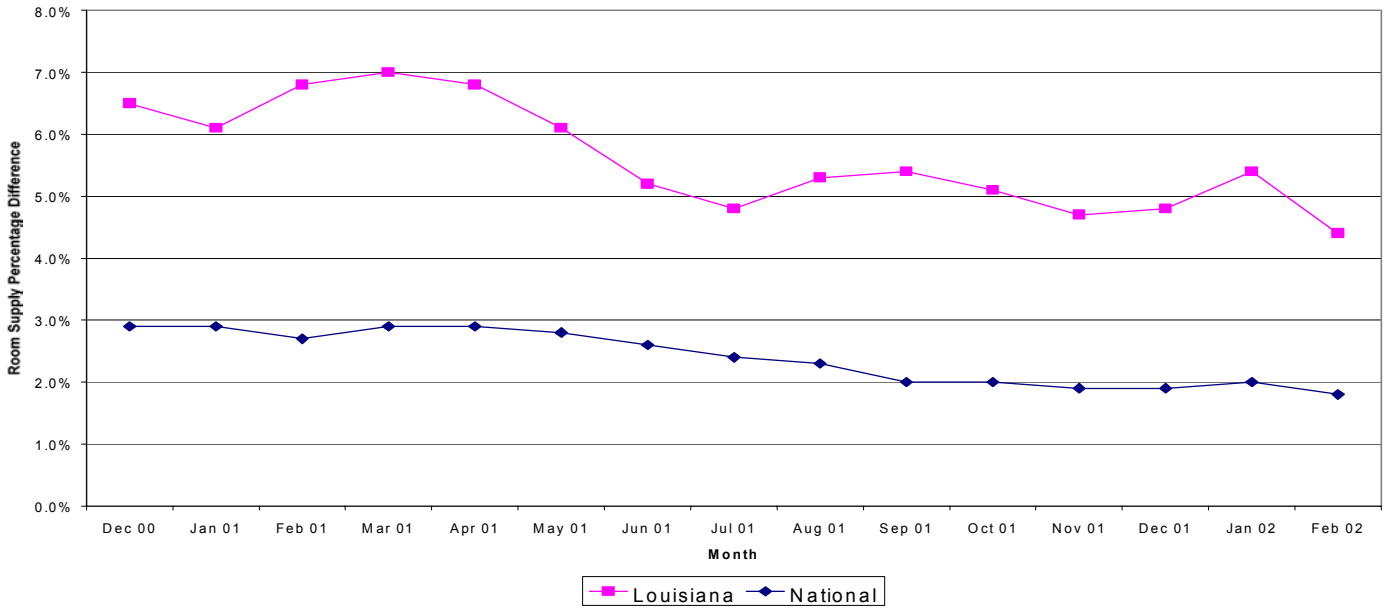
% difference from 5 years ago: +12.6%

The growth in hotel rates in Louisiana has been very consistent with those in the U.S. Louisiana's average daily rate in 2001 was the 13th highest among all states in the U.S. Five years ago Louisiana's ADR was \$79.37 and still ranked 13th among all states.

Source: Smith Travel Research

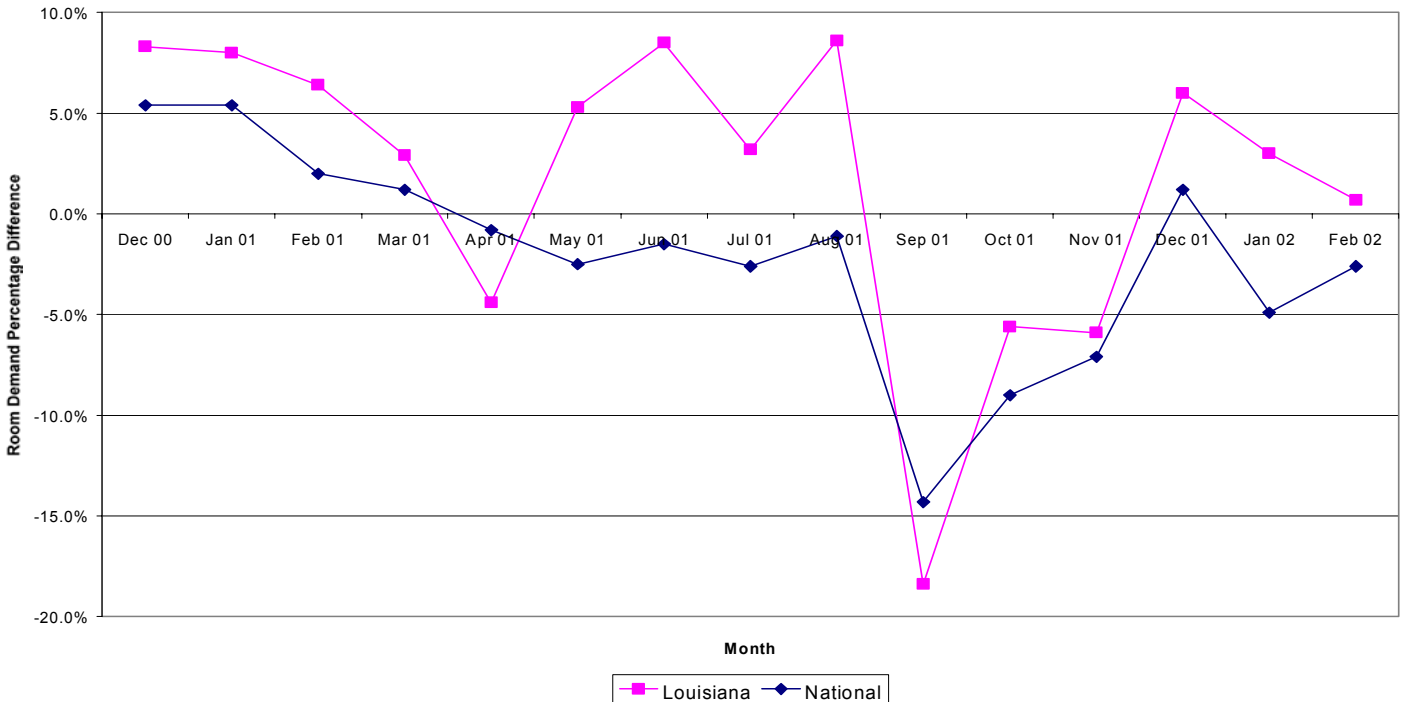
3. Hotel Trends – Room Supply

Winter 2001-02 – Room Supply



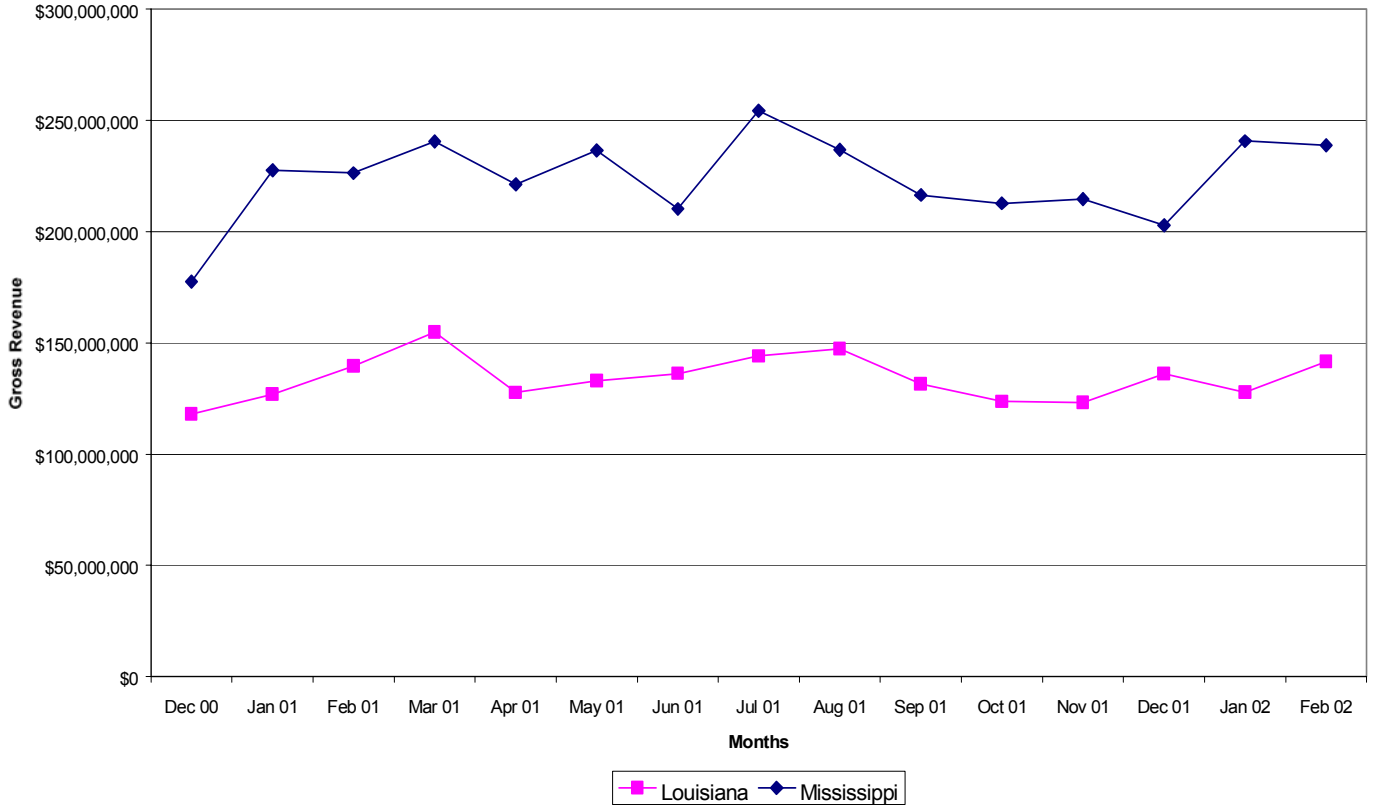
4. Hotel Trends – Room Demand

Winter 2001-02 – Room Nights Sold



6. Riverboat Gaming

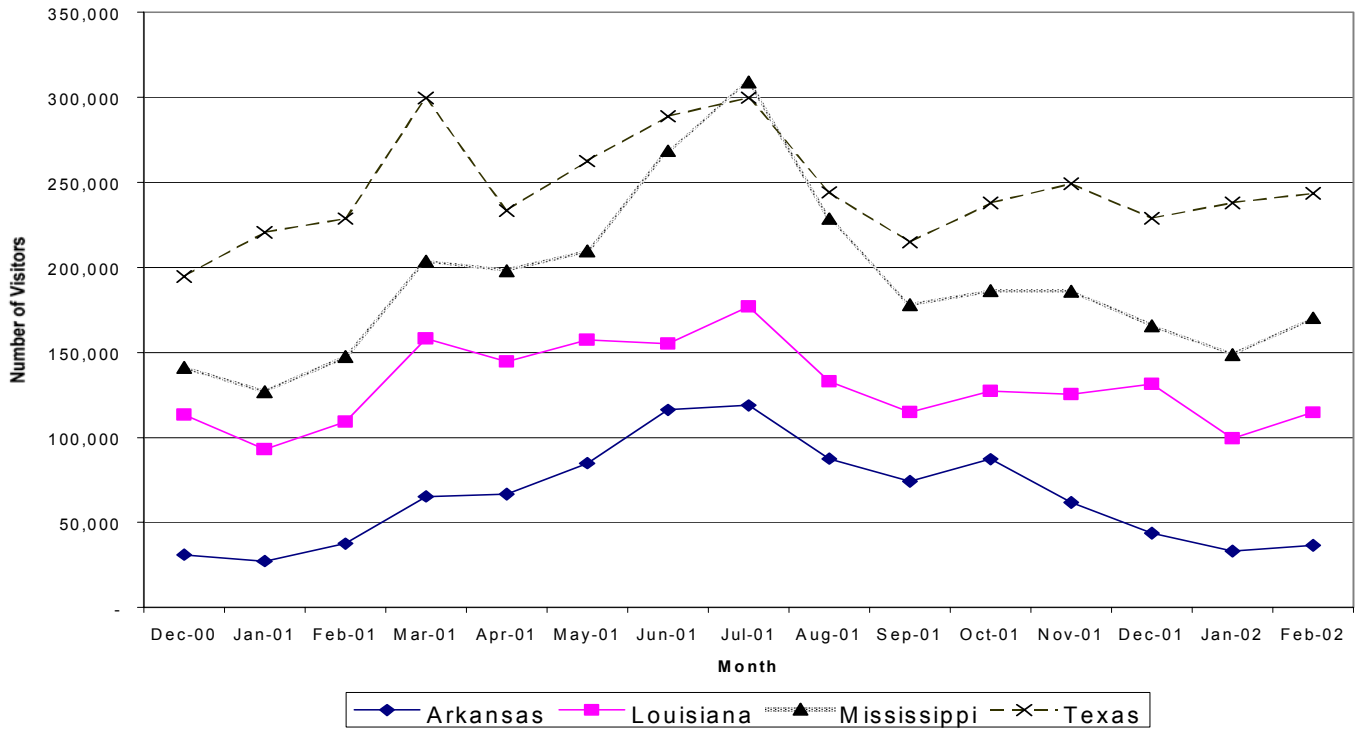
Winter 2001-02 – Gross Revenue Trend



	Louisiana	Mississippi
Winter 2002 Season		
Total Gross Revenue	\$405,443,227	\$682,418,546
% difference from prior year	+5.4%	+8.0%
% difference from 5 years ago	+27.6%	+24.9%
Calendar Year 2001		
Total Gross Revenue	\$1,623,819,613	\$2,700,761,414
% difference from prior year	+12.3%	+1.9%
% difference from 5 years ago	+30.3%	+36.1%
Sources: Louisiana State Police, and Mississippi State Tax Commission (http://www.mstc.state.ms.us/index.html)		

5. State Information Center Visitors

Winter 2001-02 State Welcome Center Visitor Trend



	Arkansas	Louisiana	Mississippi	Texas
Winter 2002 Trend*				
Number of Visitors	113,259	345,367	484,791	710,496
% difference from prior year	+20.7%	+9.5%	+16.6%	+10.3%

* 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.

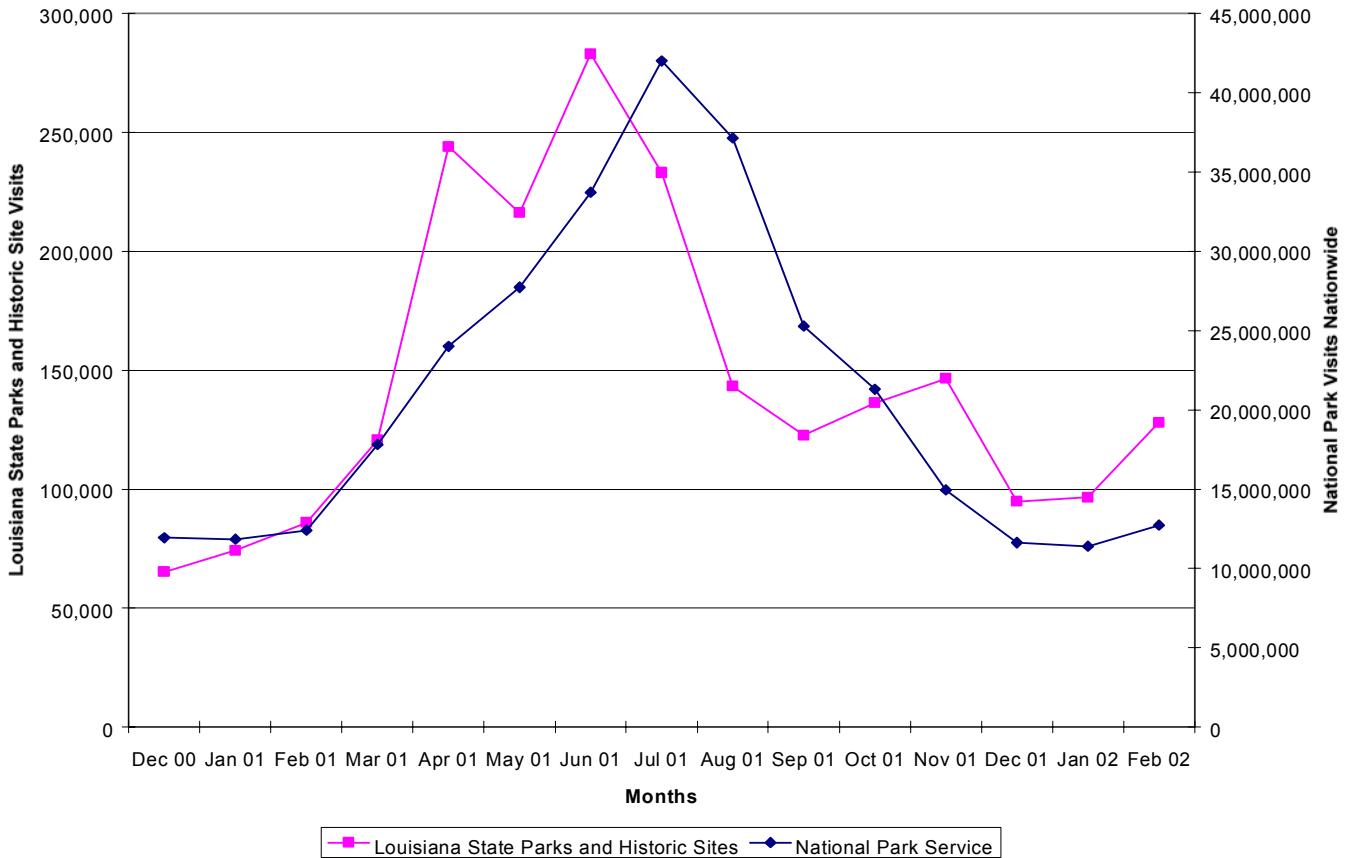
Source: Louisiana Office of Tourism

“For the period from November 1, 2001 to January 31, 2002 the total economic impact of day-trippers/passers-through and overnight visitors was \$65.1 million of which \$7.6 million (11.6%) was attributable to information received at the Louisiana Welcome Centers.”

Source: *Louisiana Welcome Center Visitor Diary, November 2001 – January 2002*, Hospitality Research Center, University of New Orleans.

8. State and National Park Visitors

Winter 2001-02 Park Visitors Trend



Winter 2002 Season

Louisiana State Parks and Historic Site Visitors: 319,349
 % difference from prior year: +41.7%

National Park Service Visits Nationwide: 35,757,400
 % difference from prior year: -1.2%

The number of visitors to Louisiana’s state parks and historic sites increased substantially during this year’s winter season. As indicated by the graph above, the winter months are traditionally the slowest season of the year for visitors to Louisiana’s park system and the National Park Service.

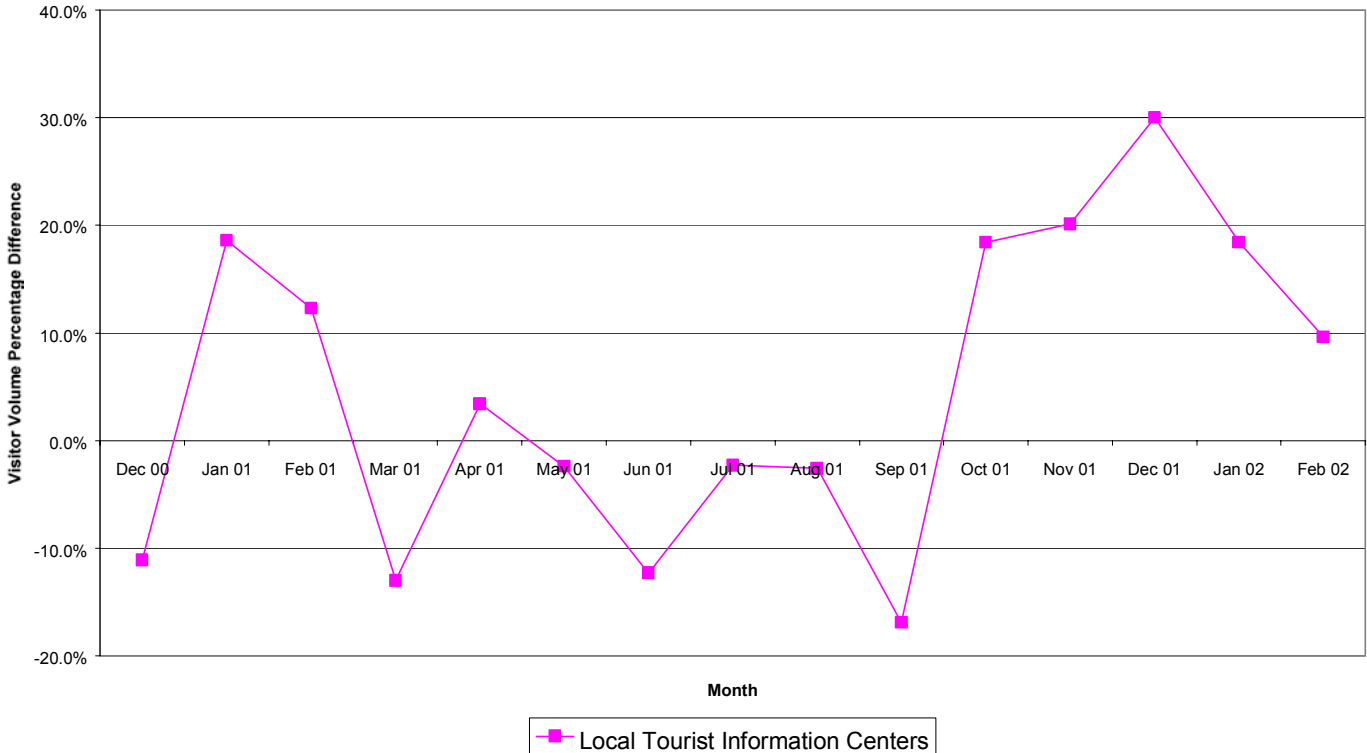
Source: Louisiana Office of State Parks, and Travel Industry Association

“Close-to-home pleasure travel has shown a stronger rebound in the aftermath of the 9/11 events, may also be a dominant theme as we move into the peak travel season. Travel suppliers have done a good job in promoting close-to-home travel, using strong price incentives.”

Source: *Travel Industry Indicators*, March 27, 2002, James V. Cammisa, Jr., Travel Industry Analyst

9. Local Tourist Information Centers

Winter 2001-02 – Tourist Center Visitor Trend



Winter 2002 Season

Louisiana local tourist information center visitors: 120,313
 % difference from prior year: +20.3%

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. During the winter season, twenty-three reported increased visitor volume and eight recorded a decrease in visitors compared to the previous winter season. As the chart above indicates, the centers have been very busy since the September 11th terrorist attacks as more leisure travelers have traveled by car.

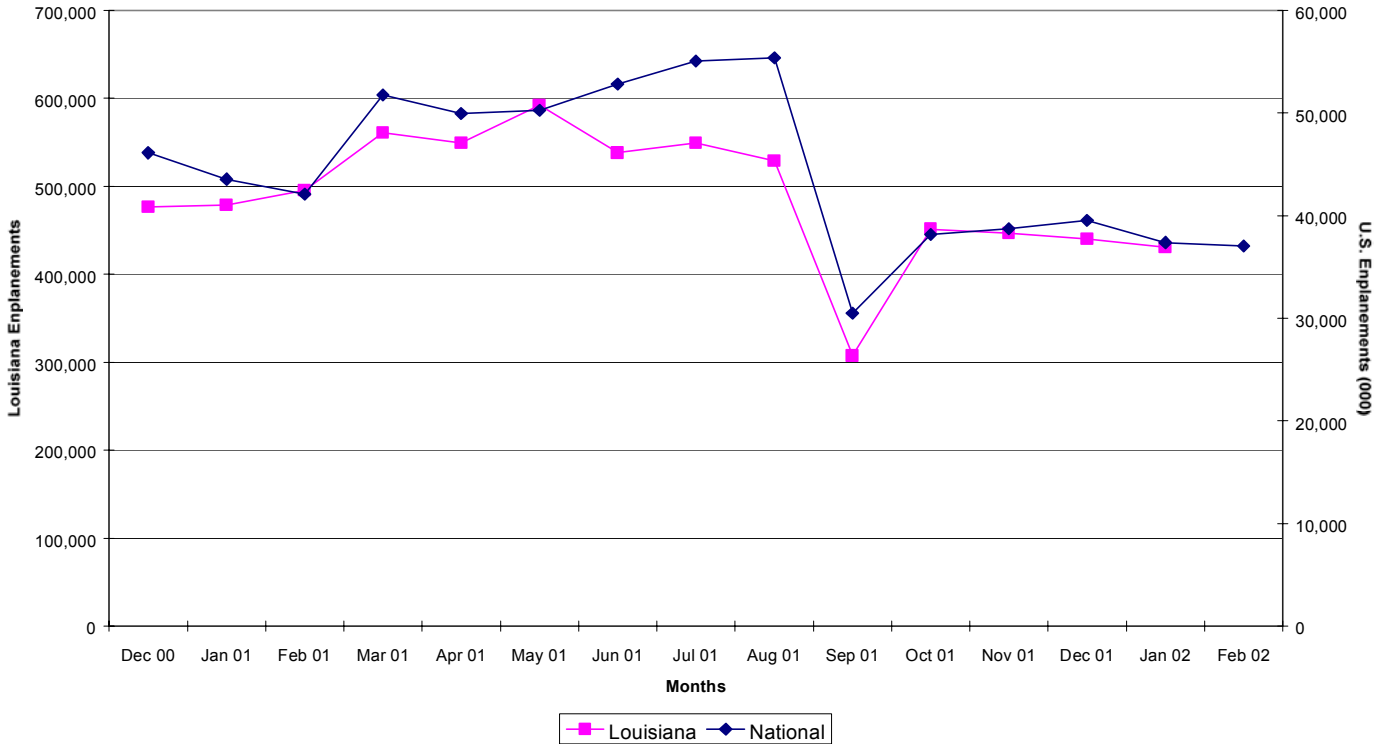
Source: Louisiana Office of Tourism

The average price for regular gasoline was 20.8% lower during the winter 2002 compared to the previous year. During the months of December, January and February the average was \$1.29 within the U.S. The year before the average price was \$1.63.

Source: U.S. Department of Energy (<http://www.eia.doe.gov/>)

7. Airport Passenger Enplanements

Winter 2001-02 Enplanements Trend



Winter 2002 Season

Louisiana Airport Enplanements: 1,318,181

% difference from prior year: -9.0%

% difference from five years ago: +2.4%

U.S. Airport Enplanements: 113.9 million

% difference from prior year: -13.5%

% difference from five years ago: -9.5%

Louisiana air traffic is recovering somewhat faster than the nation in general from the devastating effects of September 11th.

2001 Performance (January-December)

Louisiana Airport Enplanements: 5,937,689

% difference from prior year: -5.2%

% difference from five years ago: +14.5%

U.S. Airport Enplanements: 547.7 million

% difference from prior year: -7.7%

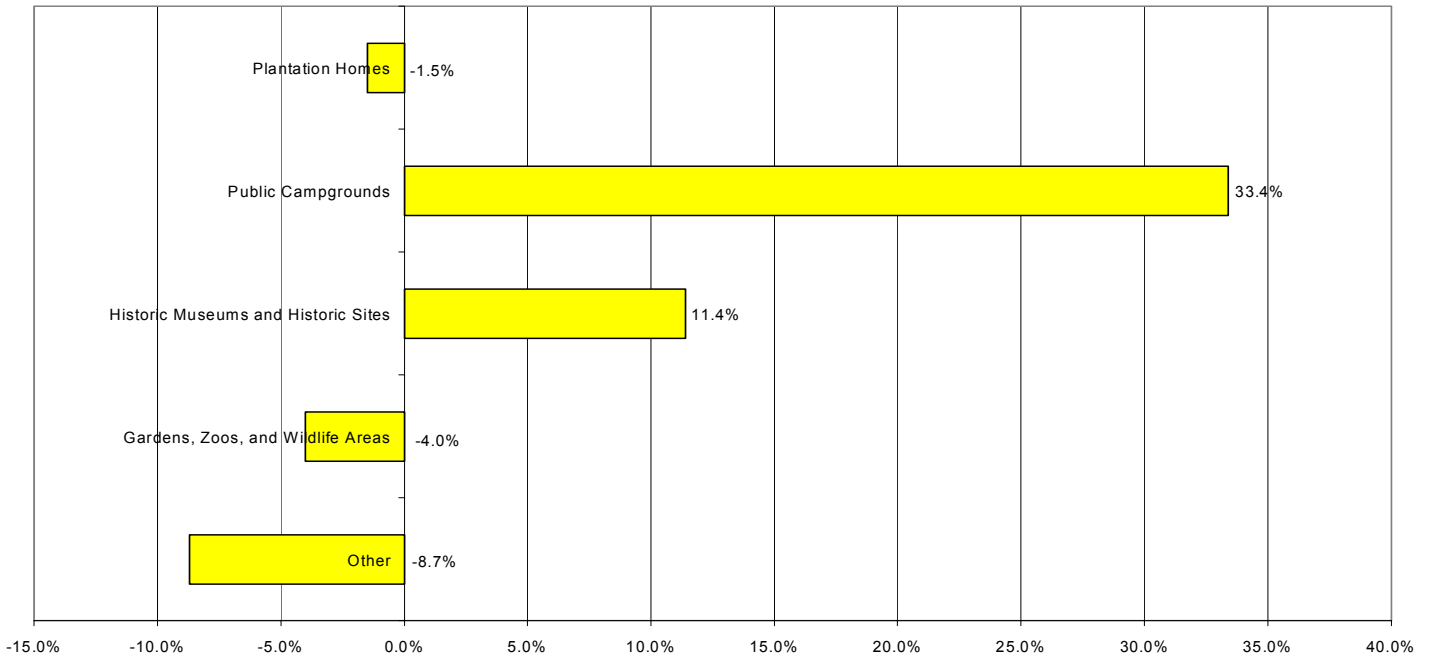
% difference from five years ago: -0.4%

U.S. passenger traffic is almost at the same level as it was five years ago. However, Louisiana is almost fifteen percent higher than it was due to higher growth over the last five years in air travelers to Louisiana.

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

10. Attractions Visitors

Winter 2001-2002 - Visitor Trend By Category
Percentage Change From Previous Year In The Number Of Visitors



Winter 2002 Season

The Louisiana Office of Tourism received visitor counts from 80 attractions across the state. Numbers were received from 7 plantation homes, 16 public campgrounds, 36 historical museums and historic sites, 8 gardens, zoos and wildlife areas, and 13 other attractions. Overall, the number of visitors to Louisiana's attractions grew during the Winter 2002 Season (December-February) by 4.8% compared to the previous winter season. The number of sites experiencing increased visitors was 52 while the number of sites with decreased visitors was 28. As the table below indicates, this is the first positive growth recorded in overall visitors in the last five seasons (since Fall 2000).

Season	Winter 2002	Fall 2001	Summer 2001	Spring 2001	Winter 2001	Fall 2000
Number of Sites w/increased attendance	52	42	44	40	19	39
Number of Sites w/decreased attendance	28	35	44	39	58	38
Percentage difference from previous year*	+4.8%	-2.9%	-5.7%	-4.0%	-8.2%	+1.0%

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

10. Regional Trends

Greater New Orleans	2001/02	2000/01	% +/-
New Orleans International Airport			
Passenger Enplanements	1,075,178	1,171,253.....	-8.2%
New Orleans Hotel-Motel Occupancy Rate			
December.....	55.5%	50.4%.....	+10.1%
January.....	61.8%	63.7%.....	-3.0%
February.....	70.5%	75.6%.....	-6.7%
New Orleans Visitor Center	26,996	28,357.....	-4.8%
Slidell Visitor Center	82,739	75,938.....	+9.0%
Kentwood Visitor Center	27,417	27,650.....	-0.8%
Pearl River Center	36,781	28,913.....	+27.2%
Parks, Attractions, Museums.....	611,647	591,584.....	+3.4%

Plantation Country	2001/02	2000/01	% +/-
Baton Rouge Metro Airport Airport			
Passenger Enplanements	81,230	93,976.....	-13.6%
Baton Rouge Hotel/Motel Occupancy Rate			
December.....	42.7%	45.7%.....	-6.6%
January.....	46.7%	47.4%.....	-1.5%
February.....	58.8%	62.4%.....	-5.8%
State Capitol Visitor Center	23,222	19,711.....	+17.8%
St. Francisville Visitor Center.....	8,214	7,929.....	+3.6%
Parks, Attractions, & Museums.....	64,669.....	56,162	+15.1%

Cajun Country	2001/02	2000/01	% +/-
Lafayette Regional Airport			
Passenger Enplanements	39,097	43,235.....	-9.6%
Lake Charles Regional Airport			
Passenger Enplanements	11,688	11,602.....	+0.7%
Lafayette Hotel-Motel Occupancy Rate			
December.....	47.5%	47.6%.....	-0.2%
January.....	50.6%	56.0%.....	-9.6%
February.....	62.4%	70.2%.....	-11.1%

Lake Charles Hotel-Motel Occupancy Rate

December	53.3%	50.5%	+5.5%
January	61.9%	53.9%	+14.8%
February	69.7%	62.8%	+11.0%

Vinton Visitor Center	42,072	37,133	+13.3%
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Parks, Attractions, & Museums.....	144,423	122,603	+17.8%
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Crossroads	2001/02	2000/01	%+/-
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England International Airport

Passenger Enplanements	25,016	25,040	-0.1%
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Alexandria Hotel-Motel Occupancy Rate

December	40.3%	37.1%	+8.6%
January	51.0%	50.6%	+0.8%
February	55.9%	54.1%	+3.3%

Vidalia Visitor Center.....	5,155	6,003	-14.1%
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Parks, Attractions, & Museums.....	53,146	72,542	-26.7%
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Sportsman's Paradise	2001/02	2000/01	%+/-
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Shreveport Regional Airport

Passenger Enplanements	66,865	80,643	-17.1%
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Monroe Regional Airport

Passenger Enplanements	19,695	24,207	-18.6%
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Shreveport Hotel-Motel Occupancy Rate

December.....	48.6%	63.0%	-22.9%
January.....	47.3%	53.4%	-11.4%
February.....	63.2%	64.5%	-2.0%

Monroe Hotel-Motel Occupancy Rate

December.....	51.4%	54.7%	-6.0%
January.....	58.5%	58.7%	-0.3%
February.....	68.4%	69.0%	-0.9%

Greenwood Visitor Center	49,673	44,777	+10.9%
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Mound Visitor Center	43,098	39,045	+10.4%
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Parks, Attractions, and Museums	50,035	38,889	+28.7%
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Notes on Regional Trends: Hotel/Motel statistics are from Smith Travel Research, Inc.; all other figures are from the Office of Tourism. Park figures include both day-use and overnight visitors. Attendance at parks, attraction and museums are self-reported to the Office of Tourism and include many different methods of recording visitors/customers.