

2003

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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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 2003. 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 state,
- the characteristics of trips taken and
- 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

Visitation to Louisiana is measured in terms of household trips and person-trips taken by residents of the 48 contiguous United States. These trips do not include trips commuting to/from work or school or trips taken as a flight attendant or vehicle operator.

The term "household trips" counts trips taken by U.S. households traveling 50 miles or more, one-way, 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 both 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 includes charts of economic and travel indicators for 2003. Appendix E looks at Mature (households headed by someone age 55+) Louisiana travel compared to Overall Louisiana travel. Appendix F presents the Business Development Index of the top 50 origin cities for Louisiana. Appendix G presents the PRIZM Cluster Development Index. Appendix H displays city volume estimates.

EXECUTIVE SUMMARY

Louisiana visitor volume increased by 2.0 percent in 2003 over 2002, to 25.1 million person-trips, compared to a 1.2 percent increase in U.S. domestic travel volume overall. In Louisiana, overnight travel increased 3.5 percent in 2003 over 2002.

- Louisiana hosted 25.1 million visitors in 2003, up 2.0 percent over the prior year. Non-residents generated most Louisiana person-trips (76%). African-American travelers represented 14 percent of all travel in the state, or 3.5 million person-trips.
- Two thirds (65%) of Louisiana visitors spent at least one night in the state (16.2 million). The average duration for overnight visitors was 3.2 nights. Thus, Louisiana experienced an estimated 51.5 million visitor nights in 2003.
- Texas, especially Houston and Dallas, were the top origin markets for Louisiana visitors. New Orleans was the top destination city, capturing 44 percent of all non-resident person-trips to the state.
- Data from 2003 show that Beaumont-Port Arthur, Texas and Biloxi-Gulfport, Mississippi and are the origin markets with the highest propensity for travel to Louisiana. (Travel propensity takes into account the size of the market and the volume of travel to Louisiana.)
- Four out of the six competitive states experienced a growth in travel volume. Georgia (+2.9%) and Alabama (+2.2%) increased more than Louisiana (+2.0%). Tennessee (+1.7%) and Florida (+0.8%) experienced a moderate increase in travel volume. Mississippi (-2.0%) and Texas (-1.1%) travel volumes decreased over 2002.

Non-Resident Visitors

- Seventy-six percent of Louisiana travelers in 2003 (19.1 million person-trips), were by non-resident travelers. Non-resident visitors generated a total of 44.6 million visitor nights in 2003.
- Four out of five (79%) non-resident visitors to Louisiana in 2003 traveled to the state for leisure purposes. Twenty-one percent of non-resident visitors traveled for business purposes.
- One in four (24%) non-resident visitors to the state traveled by air. Sixty-four percent traveled by auto, truck, camper or recreation vehicle (RV), and six percent by rental car as a primary mode of transportation.
- Most non-resident visitors (71%) stayed overnight, and those who did spent an average of 3.3 nights in the state. Three in ten (29%) visited just for the day.
- Of the 13.5 million non-resident overnight visitors to Louisiana, two thirds (68%) included stays in hotels, motels or bed and breakfast establishments (B&Bs). Twenty-eight percent used private home lodging while visiting the state.
- Shopping and gambling were the most popular trip activities for non-resident visitors (23% each), followed by attend a social or family event (18%).
- Non-resident visiting households spent, on average, \$513 per trip in 2003. The highest-spending households came from Florida (\$549). The lowest spenders were from Mississippi (\$224). Texas visitors generate the largest share of overall spending, due to the high volume of visitors from the state.

Profiles

Compared to U.S. travelers in general, non-resident Louisiana visitors in 2003 were:

- More likely to travel for entertainment purposes (25% non-resident LA vs. 14% U.S.) and less likely to travel for outdoor recreation (4% vs. 10%).
- More likely to travel by air (24% non-resident LA vs. 16% U.S.).
- More likely to be on a day-trip (29% non-resident LA vs. 24% U.S.).
- More likely to stay in a hotel, motel or B&B (68% non-resident LA vs. 55% U.S.).
- More likely to participate in gambling (23% non-resident LA vs. 7% U.S.), go city/urban sightseeing (16% vs. 10%), or visit historic places/sites/museums (12% vs. 8%) and less likely to go shopping (23% vs. 30%), attend social/family events (18% vs. 27%), participate in outdoor activities (3% vs. 11%) or visit the beach (2% vs. 10%).
- Spending more per household trip, on average (\$513 vs. \$398).

Compared to Louisiana visitors overall, Louisiana business/convention travelers in 2003 were:

- More likely to travel by air (56% business/convention vs. 19% total).
- More likely rent a car as a secondary mode of transportation (6% business/convention vs. 2% total).
- Staying longer (average length of stay 2.3 nights business/convention vs. 2.0 nights total).
- More likely to lodge in hotels, motels, or B&B's (63% business/convention vs. 41% total).
- More like to attend seminars/courses (22% business/convention vs. 5% total) and less likely to go shopping (18% vs. 22%), gamble (10% vs. 19%), visit historic places/sites/museums (7% vs. 10%) or attend social/family events (6% vs. 19%).
- Spending more per household trip, on average (\$610 business/convention vs. \$433 total).
- More likely to be employed full-time (85% business/convention vs. 71% total).
- Higher average annual household income (\$90.1K business/convention vs. \$66.1K total).

Compared to Louisiana visitors overall, Louisiana leisure travelers in 2003 were:

- More likely to travel by car/truck/RV/rental car as a primary mode (83% leisure vs. 76% total).
- Less likely to stay in hotels, motels or B&B's (37% leisure vs. 41% total).
- Spending less per household trip, on average (\$364 leisure vs. \$433 total).
- More likely to have children under 18 on the trip (31% leisure vs. 24% total).
- More likely to be retired (19% leisure vs. 16% total).
- From households with lower average annual incomes (\$58.7K leisure vs. \$66.1K total).

2003 U.S. ECONOMY AND TRAVEL INDUSTRY OVERVIEW

The U.S. economy in 2003 began to improve after experiencing an economic recession and the 2001 terrorist attacks. Real GDP recovered greatly in the third quarter, climbing 8.2 percent, the largest quarterly increase since the first quarter of 1984. Overall, this led real GDP to increase 3.1 percent for the year. Real disposable income grew 2.6 percent and real personal consumption expenditures were up 3.1 percent in 2003. The strengthening economy, however, failed to improve the U.S. employment situation in 2003. Although employment showed signs of recovery in November and December, the national unemployment rate hit 6.0 percent in 2003. The Consumer Confidence Index decreased to 79.8 (1985=100) from the 2002 level of 96.6. On the other hand, the Consumer Price Index (CPI), an indicator of the level of price inflation, remained relatively low—up only 2.3 percent in 2003.

Domestic travel volume increased moderately in 2003, while domestic travel expenditures began to grow after declining in 2002 and 2003. International travel to the U.S. continued to decline in 2003.

U.S. Travel Volume in 2003

Driven mostly by leisure travel, total person-trips were up 1.2 percent over 2002, according to TIA's TravelScope® survey. Leisure person-trips grew by 1.9 percent in 2003. Following the change in travel preferences after 9/11, leisure travelers continued to take trips closer to home, using highways and going to rural destinations, rather than traveling to major cities and using air transportation. Business/convention travel, however, declined 2.9 percent, marking the fifth consecutive year of decline.

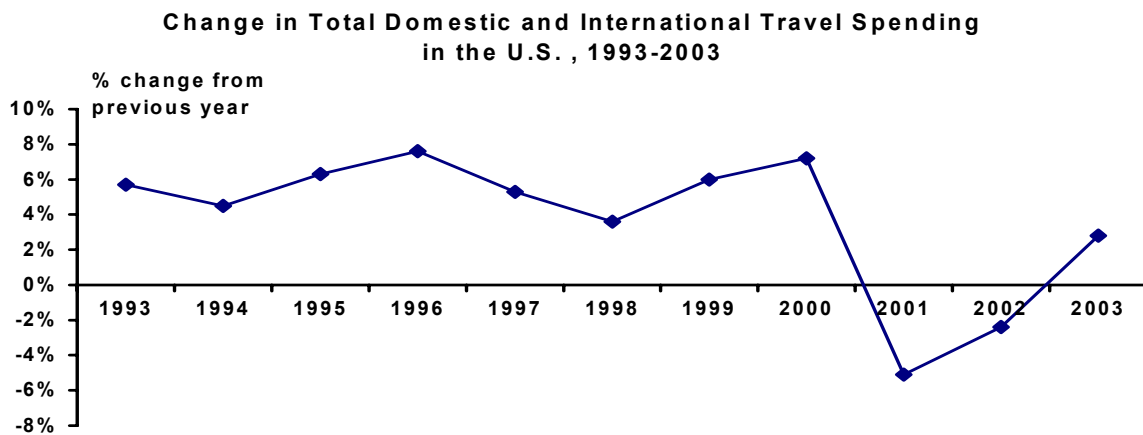
International visitors to the U.S. dropped another 3.7 percent in 2003 after a substantial decline in both 2001 and 2002.

Travel Expenditures in 2003

Domestic travel expenditures in the U.S. grew in 2003 after two consecutive years of decline. Domestic travelers spent \$487 billion in the U.S. during their 2003 travels, an increase of 3.5 percent from 2002. However, international traveler expenditures in the U.S., excluding spending on international airfares purchased outside the U.S., fell 2.2 percent in 2003 after undergoing a 7.4 decline in 2002.

Combined domestic and international travel expenditures were up an estimated 2.8 percent in 2003 over 2002. Compared to 2001, the most challenging year in travel industry history, this represents a 5.2 percent increase in total travel expenditures.

Leisure travel played a significant part in the growth of domestic travel spending. Total domestic leisure travel spending reached \$318.6 billion, up 5.1 percent from 2002. Spending by domestic business travelers remained unaltered in 2003 due to the decline in business travel volume. As a result, the market shares of business and leisure travel spending have varied greatly since 2000.



Sources: Travel Industry Association of America, Office of Travel and Tourism Industries

Table A: 2002-03 U.S. Domestic Travel Expenditures by Primary Purpose of Trip

	2003 Travel Spending In the U.S. (\$ Billions)	2002 Travel Spending in the U.S. (\$ Billions)	2003 Percent Change Over 2002 (%)
Leisure Travelers	\$334.7	\$318.6	5.1%
Business Travelers	\$152.3	\$152.1	0.1%
Total	\$487.0	\$470.7	3.5%

Sources: Travel Industry Association of America, Office of Travel and Tourism Industries

Travel spending on auto transportation jumped 10.1 percent from 2002, to \$83.3 billion. This was mainly due to the dramatic increase in gasoline prices during 2003 and the shift from air to auto and other modes of transportation.

Air travel continued to decline in 2003. Total domestic passenger enplanements were down 2.8 percent from 2002 and international passenger enplanements decreased by 1.8 percent in 2003, according to the Air Transport Association (ATA). On the other hand, Amtrak reported a 5.7 percent increase in ridership during 2003. The cruise line industry exhibited strong growth in 2003 as well.

Domestic travel spending on lodging increased 2.3 percent over 2002. According to Smith Travel Research, hotel room demand (hotel room nights sold) grew 1.6 percent and room supply rose 1.2 percent in 2003. Reflecting the increase in total travel volume, spending on food services and other categories also showed positive growth in 2003.

Table B: Travel Expenditures in the U.S. 2002-2003

<u>Industry Sector*</u>	<u>2003 Travel Spending in The U.S. (\$ Billions)</u>	<u>2002 Travel Spending in The U.S. (\$ Billions)</u>	<u>2003 Percent Change Over 2002 (%)</u>
Public Transportation	\$92.4	\$91.7	0.7%
Auto Transportation	83.3	75.6	10.1%
Lodging	87.7	85.7	2.3%
Foodservice	122.6	119.0	3.0%
Entertainment	59.8	57.8	3.5%
General Retail	41.2	40.7	1.2%
Domestic Travelers	\$487.0	\$470.7	3.5%
International Travelers**	\$65.1	\$66.5	-2.2%
Total	\$552.0	\$537.2	2.8%

* Total international traveler spending does not include international passenger fare payments, international traveler spending in the U.S. territories, and Canadian traveler spending not allocated to states.

Source: Travel Industry Association of America

Travel Employment in 2003

The upturned U.S. economy did not lead private industry to hire more workers. Employment in the private sector continued to decline in 2003. The national unemployment rate hit 6.0 percent in 2003. About 2 million jobs were lost between September 2001 and December 2003, according to the Bureau of Labor Statistics (BLS). Total employment generated by domestic travel in the U.S. fell by 1.4 percent in 2003. Employment generated by declining international travel in the U.S. was down 6.5 percent in 2003. As a result, total travel-generated employment fell 2.0 percent in 2003.

Employment generated by domestic travel on public transportation (composed mainly of the airline industry) declined by 6.5 percent in 2003, the most severe decrease among all travel industry sectors. Employment in travel planning (i.e., the travel agent and travel arrangement industry) continued to decline as well, down 4.9 percent from 2002. In addition, lodging industry employment decreased 1.2 percent.

Employment in the entertainment (i.e., amusement/recreation) sector increased 3.4 percent in 2003 after widespread downsizing in 2002.

<u>Industry Sector*</u>	2003 Travel-Generated Employment (Thousands)	2002 Travel-Generated Employment (Thousands)	2003 Percent Change Over 2002 (%)
Public Transportation	\$931.0	\$995.8	-6.5%
Auto Transportation	255.6	259.0	-1.3%
Lodging	1,153.1	1,167.0	-1.2%
Foodservice	2,369.1	2,394.5	-1.1%
Entertainment	1,045.8	1,011.8	3.4%
General Retail	341.5	347.4	-1.8%
Travel Planning	174.4	183.3	-4.9%
Domestic Travelers	6,270.1	6,358.8	-1.4%
International Travelers	839.3	897.3	-6.5%
Total	\$7,109.5	\$7,256.0	-2.0%

Sources: Travel Industry Association of America, Bureau of Labor Statistics

2003 SUMMARY OF DOMESTIC TRAVEL IN THE U.S.

An estimated 1,140.0 million domestic person-trips were taken by U.S. residents in 2003

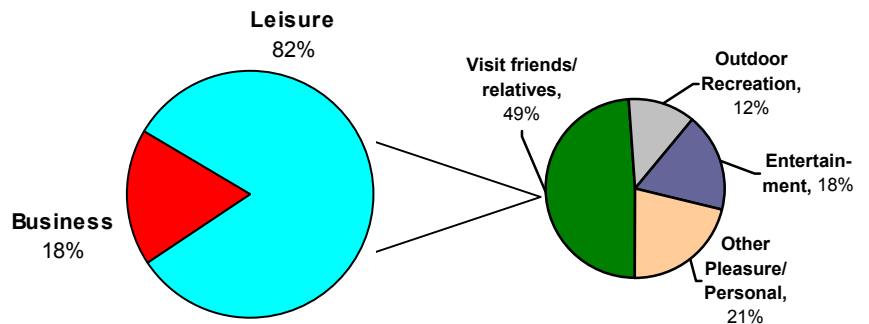
Overall U.S. travel volume increased 1.2 percent over 2002.

The majority (82%) of person-trips in 2003 were for leisure purposes (visiting friends or relatives, outdoor recreation, entertainment/sightseeing and other pleasure/personal reasons). Within leisure trips, visiting friends/relatives is the most common reason for traveling.

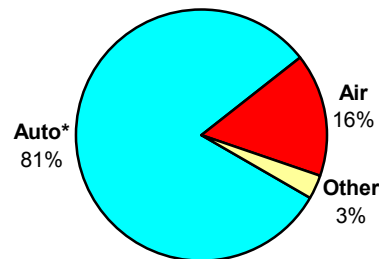
Travel for business purposes accounted for 18 percent of all U.S. person-trips. Business travel volume declined by 2.0 percent compared to 2002. In fact, business travel volume has declined for five consecutive years.

Most U.S. travel is by auto (81%) in 2003. Air travel accounted for 16 percent in 2003, and other modes of transportation accounted for 3 percent.

2003 Primary Purpose of Trip



2003 Primary Mode of Transportation



*Includes car/truck/camper/RV/rental car

Other Characteristics of the Average U.S. Trip:

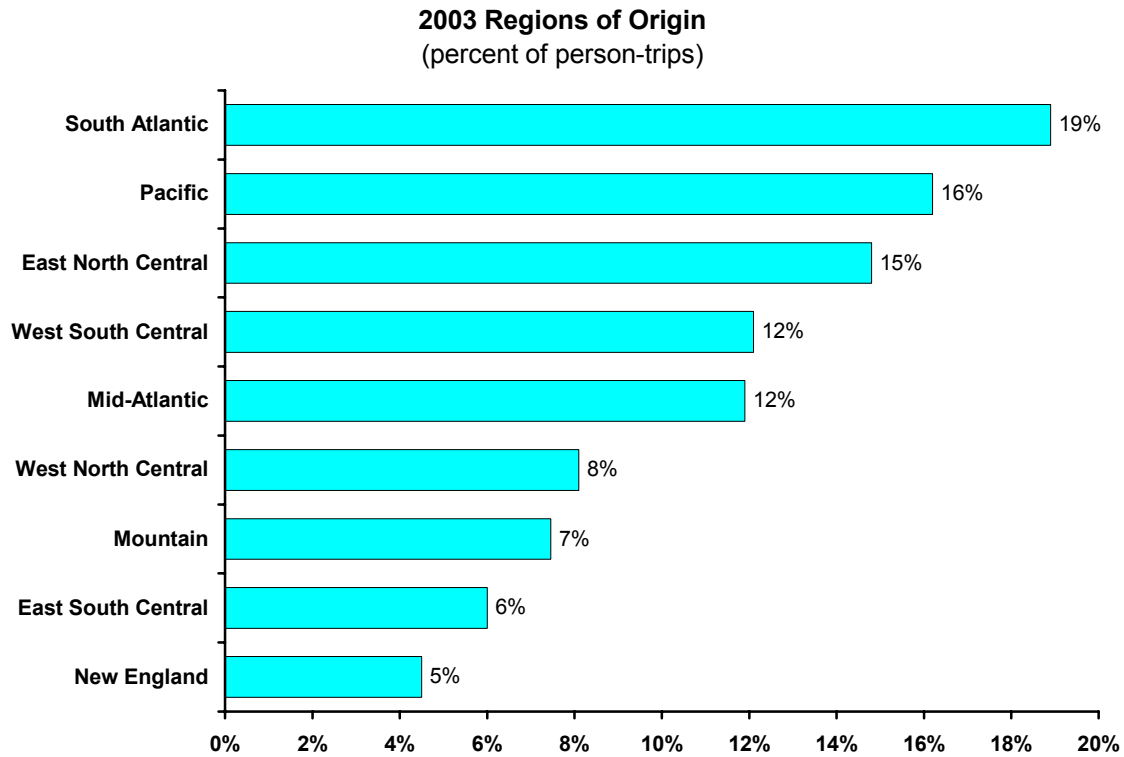
- 26 percent of trips include children under 18.
- The average trip duration is 3.1 nights. The average overnight trip duration is 4.1 nights.
- 55 percent of overnight U.S. trips include lodging in a hotel, motel or B&B.
- 39 percent of overnight U.S. trips include lodging in a private home.
- The average expenditure per trip is \$398, not including transportation to the destination.

The most popular trip activities on the average U.S. trip are:

- shopping (30%);
- attending social/family events (27%);
- outdoor activities(11%);
- city/urban sightseeing (10%);
- rural sightseeing (10%);
- go to the beach (10%);
- visiting historic places, sites, museums (8%);
- gambling (7%);
- going to theme/amusement parks (7%); and
- visiting national/state parks (7%).

Census Division of Origin

One in five (19%) U.S. domestic travelers originated in the South Atlantic division. The Pacific and East North Central divisions accounted for 16 percent and 15 percent of person-trips, respectively. According to the U.S. Census, these are also the most populous divisions in the U.S.



2003

**TravelScope® Profile
of U.S. Travelers
to Louisiana**

VISITOR VOLUME

	<u>No. of Visitors (in person-trips)</u>	<u>Percent of Trip Spent in Louisiana***</u>
Total U.S.	1,139,989,000	not applicable
Total Louisiana	25,108,000	57%
Non-resident visitors	19,060,000	56%
Non-resident African-American visitors	2,483,000	66%
Resident travelers	6,048,000	60%
Louisiana Cities*		
New Orleans		67%
Resident	864,000	
Non-resident	8,437,000	
Shreveport		55%
Resident	501,000	
Non-resident	2,413,000	
Baton Rouge		62%
Resident	735,000	
Non-resident	1,460,000	
Lake Charles		64%
Resident	291,000	
Non-resident	1,324,000	
Lafayette		94%
Resident	469,000	
Non-resident	1,007,000	
Monroe**		42%
Resident	331,000	
Non-resident	371,000	
Alexandria**		94%
Resident	295,000	
Non-resident	251,000	

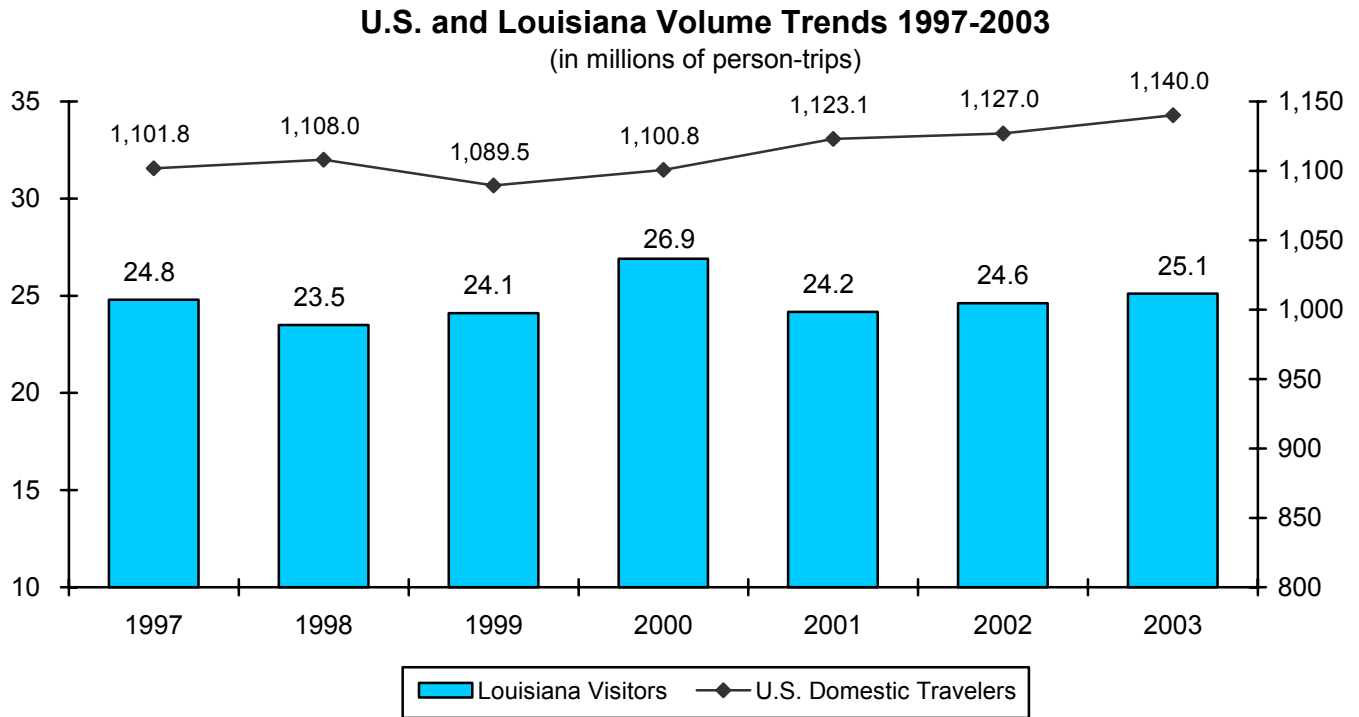
* See Appendix F for an explanation of city volume calculations.

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

***Calculated by dividing trip duration within Louisiana by total trip duration.

Visitor Volume 1994-2003

Over 25 million travelers visited Louisiana in 2003, an increase of 2.0 percent over 2002. In comparison, U.S. domestic travel volume increased 1.2 percent in 2003 over 2002.



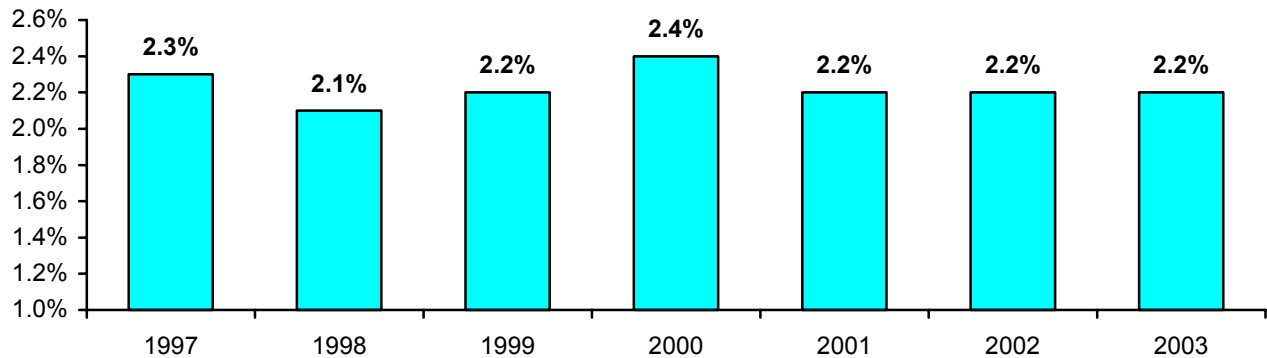
The fourth quarter had the most person-trips to Louisiana, and the first quarter the fewest. Nationally, the third quarter was the strongest quarter for travel.

2003 Travel to Louisiana by Quarter (in millions of person-trips)		
	National Travel Volume	Louisiana Travel Volume
1st quarter	217.9	5.6
2nd quarter	292.2	6.4
3rd quarter	345.0	6.4
4th quarter	284.9	6.7
TOTAL	1,140.0	25.1

Market Share

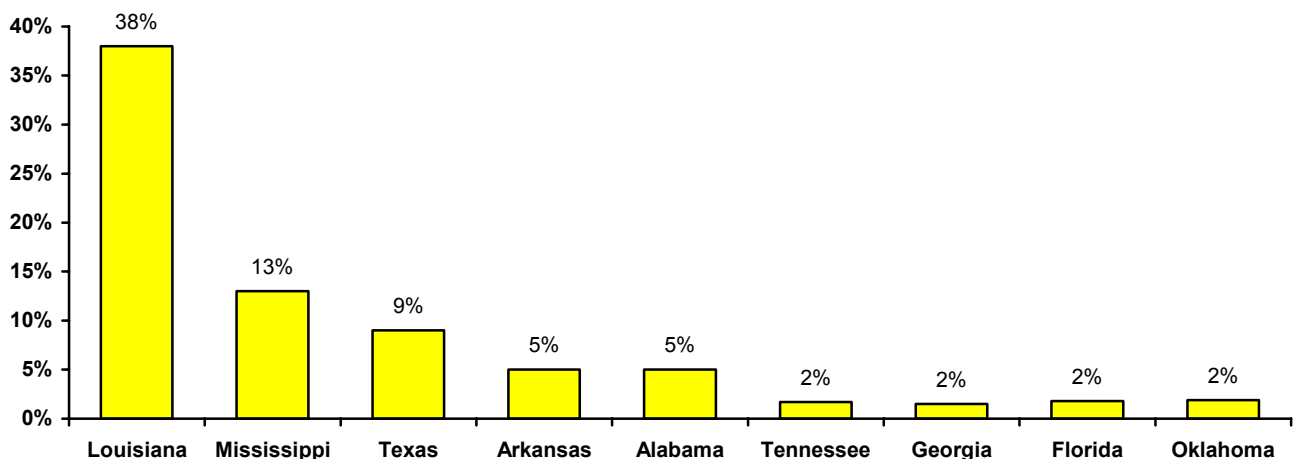
Louisiana had a 2.2 percent share of overall U.S. domestic travel volume in 2003. This was stable compared to 2002.

Louisiana Visitors Share of Total Domestic U.S. Travel Market



Narrowing down to a regional focus, it becomes clear that Louisiana draws a much higher proportion of person-trips from several neighboring states. Of all person-trips *originating* in Louisiana in 2003, 38 percent included at least one in-state destination on their trip. Thirteen percent of Mississippi travelers visited Louisiana when they traveled in 2003 and nine percent of person-trips originating in Texas included Louisiana. Five percent of travelers each from Arkansas and Alabama visited Louisiana. Five percent of travelers each from Arkansas and Alabama visited Louisiana.

Louisiana Visitors Share of Select States' Outbound Travel Volume, 2003



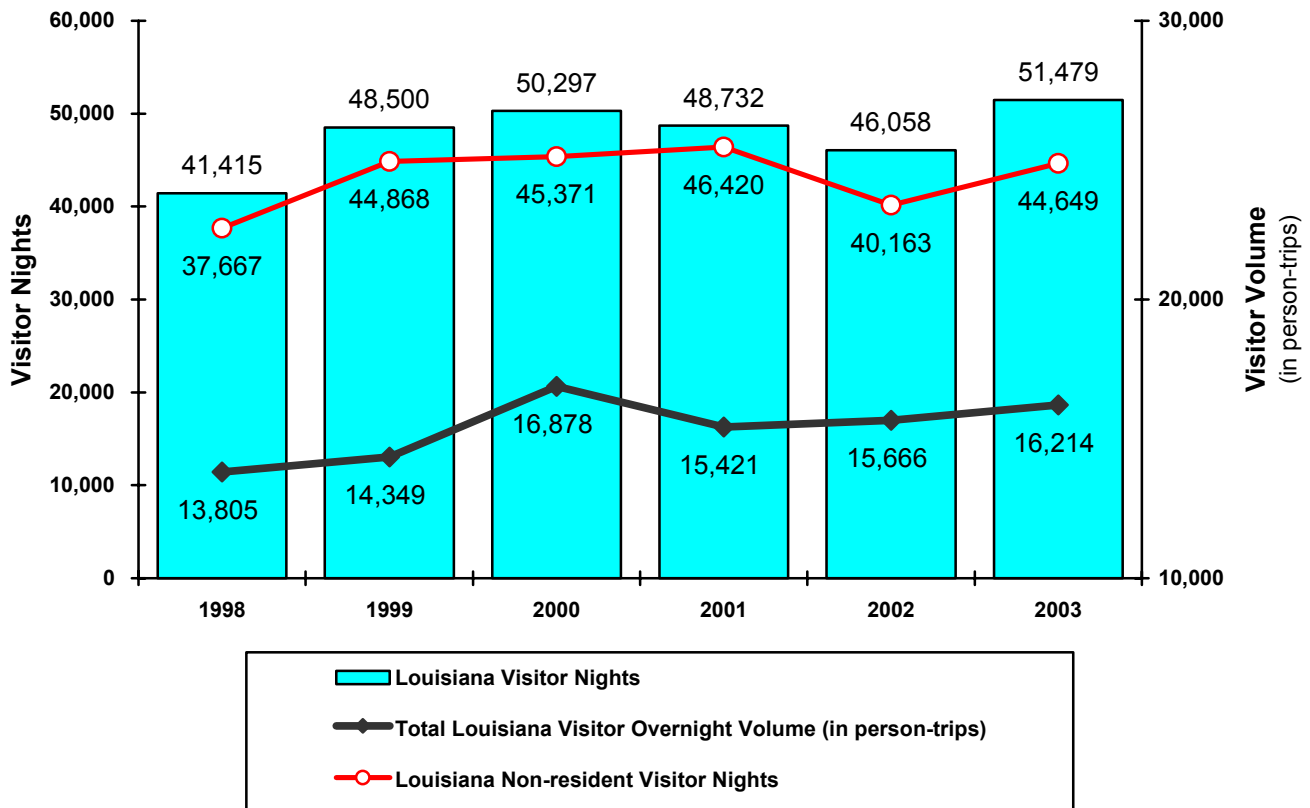
State	Total Outbound Travel (in millions of person-trips)
Louisiana	16.1
Mississippi	10.8
Texas	97.3
Arkansas	12.2
Alabama	20.2
Tennessee	23.5
Georgia	36.7
Florida	63.6
Oklahoma	15.7

Visitor Nights

Of person-trips to Louisiana, 65 percent or 16.2 million, included at least one night in the state. The average stay for an overnight visitor was 3.2 nights. This translates into an estimated 51.5 million visitor nights, an 11 percent increase from 2002. This is due to an increase in volume of trips and in average length of overnight stay (3.2 nights vs. 2.9 in 2002).

Non-resident travelers represent 87 percent of visitor nights in Louisiana. The volume of visitor nights by non-resident visitors increased by 11 percent over 2002, to 44.6 million nights.

Louisiana Visitor Overnight Volume and Visitor Nights Trends 1998-2003
(in thousands)

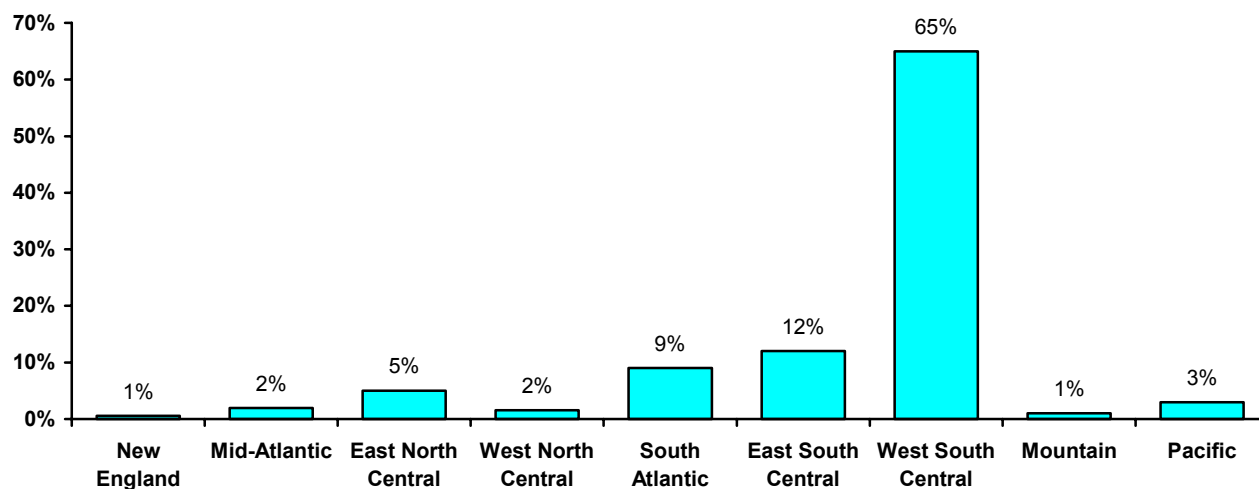


VISITOR ORIGINS

Division of Origin

Almost two thirds of Louisiana person-trips (65%) originated in the West South Central division, which is comprised of Louisiana, Arkansas, Oklahoma and Texas. The East South Central and South Atlantic divisions also contributed significant visitor volume, providing a total of 21 percent of Louisiana person-trips. The South Atlantic division includes Florida, Georgia, Virginia, North Carolina, Maryland, South Carolina, Delaware and West Virginia. The East South Central division includes Mississippi, Alabama, Tennessee and Kentucky. No other census division accounted for greater than five percent of person-trips to the state.

2003 Louisiana Visitors Division of Origin
(percent of person-trips)



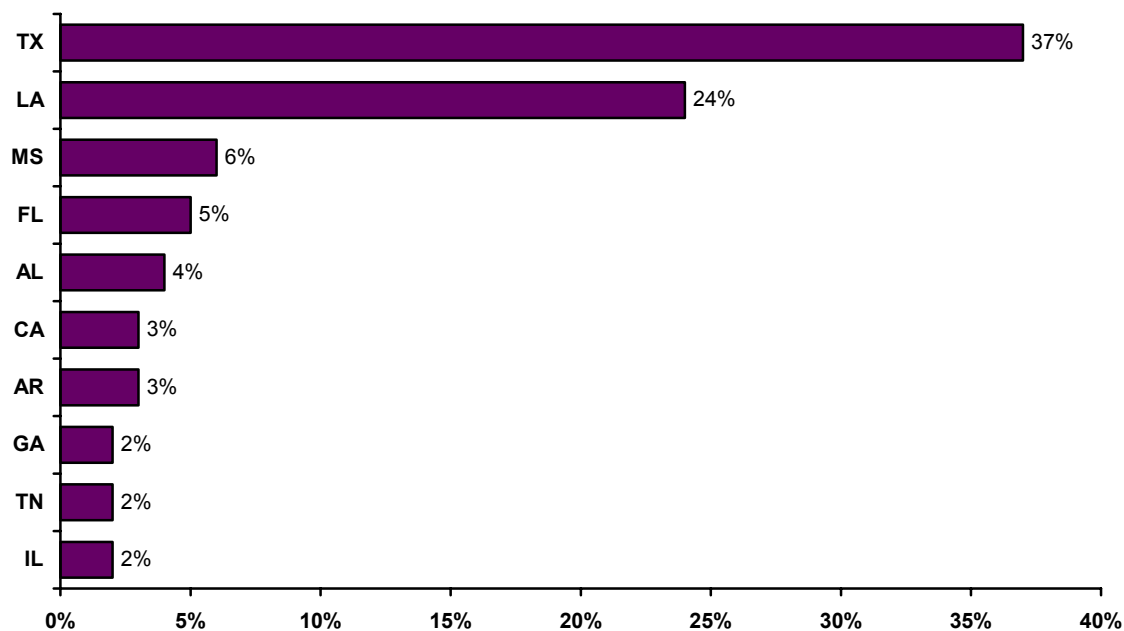
Divisional travel volume to Louisiana is often driven by just a few states. Over half (57%) of the travel volume to Louisiana from the West South Central division in 2003 came from visitors originating in Texas. Another 37 percent of person-trips from the West South Central division were Louisiana residents traveling within the state. Comparatively little volume came from the other two states in the region, Arkansas (4%) and Oklahoma (2%). East South Central visitors were primarily from Mississippi (47%) and the majority of South Atlantic visitors originated in Florida (48%) or Georgia (23%). Nearly all (92%) visitors from the Pacific division originated in California.

Top States of Origin

Texas remains the top origin market for Louisiana by a significant margin. Texas residents generated over a third (37%) of person-trips to Louisiana in 2003. Louisiana was the second largest source of state travel, as a quarter (24%) of person-trips originated within the state. Other states providing three percent or more of visitor volume to Louisiana in 2003 include Mississippi (6%), Florida (5%), Alabama (4%), California (3%) and Arkansas (3%).

Leisure travelers to Louisiana were more likely than business/convention travelers to come from Texas, Mississippi and Arkansas. Business/convention travelers were more likely than leisure travelers to come from Tennessee, Maryland, Illinois, and Ohio.

Top Ten States of Origin for Louisiana Travel
(percent of person-trips)



Top DMAs of Origin

Houston and Dallas–Fort Worth remain the top advertising markets for Louisiana. In 2003, 14 percent of person-trips to Louisiana originated from Houston. Another nine percent originated from Dallas-Fort Worth.

Top Advertising Markets of Origin for 2003 Louisiana Visitors (in person-trips)						
	TOTAL		LEISURE		BUSINESS/ CONVENTION	
	Volume	Share of LA Travel	Volume	Share of LA Travel	Volume	Share of LA Travel
Houston	3,452,000	14%	2,836,000	14%	431,000	10%
Dallas – Fort Worth	2,325,000	9%	1,966,000	10%	285,000	7%
Jackson, MS	815,000	3%	767,000	4%	28,000	1%
Tyler – Longview, TX	812,000	3%	741,000	4%	11,000	*
Mobile – Pensacola	644,000	3%	509,000	3%	99,000	2%
Waco-Temple-Bryan	608,000	2%	569,000	3%	35,000	1%
San Antonio	546,000	2%	506,000	3%	10,000	*
Austin	508,000	2%	438,000	2%	70,000	2%
Beaumont-Port Arthur	465,000	2%	414,000	2%	51,000	1%
Los Angeles	420,000	2%	344,000	2%	71,000	2%
Atlanta	408,000	2%	226,000	1%	106,000	3%

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

* Less than 0.5%.

DMA/Business Development Index (BDI)*

Based on data from 2000-2003, Beaumont-Port Arthur, TX and Biloxi-Gulfport, MS residents have the highest propensity to travel to Louisiana, with BDI indices of 1442 and 1369, respectively. Tyler-Longview, TX (944); Victoria, TX (866); and Jackson, MS (817) also have a high propensity for travel to Louisiana. Other cities with strong propensities for travel to Louisiana (index over 500) include Hattiesburg-Laurel, MS (741); Houston, TX (640); and Abilene-Sweetwater, TX (552).

**2000-2003 Business Development Index (BDI) for
Out-of-state Louisiana Markets**

<u>City (DMA) of Origin</u>	<u>Index</u>
Beaumont-Port Arthur, TX	1442
Biloxi-Gulfport, MS	1369
Tyler-Longview (Lufkin & Nacogdoches), TX	944
Victoria, TX	866
Jackson, MS	817
Hattiesburg-Laurel, MS	741
Houston, TX	640
Abilene-Sweetwater, TX	552
Panama City, FL	462
Dallas-Ft. Worth, TX	452
Mobile-Pensacola (Ft. Walton Beach), AL-FL	436
Waco-Temple-Bryan, TX	430
Austin, TX	409
Little Rock-Pine Bluff, AR	393
Columbus-Tupelo-West Point, MS	321
Meridian, MS	318

See Appendix E for a list of the Business Development Indices for the top 50 origin cities to Louisiana.

* The Business Development Index is calculated for each city to measure the propensity of U.S. households to take trips (measured by household trips) compared to the share of total households. For example, Beaumont-Port Arthur, TX households make up 0.16 percent of U.S. households, yet they take 2.31 percent of domestic household trips to Louisiana, creating a Business Development index of 1442. The baseline of 100 represents equality in the proportion of U.S. households in a city and the percentage of trips that city's households take to Louisiana. The above figures are based on data from 2000-2003. For a more complete chart, please see Appendix E.

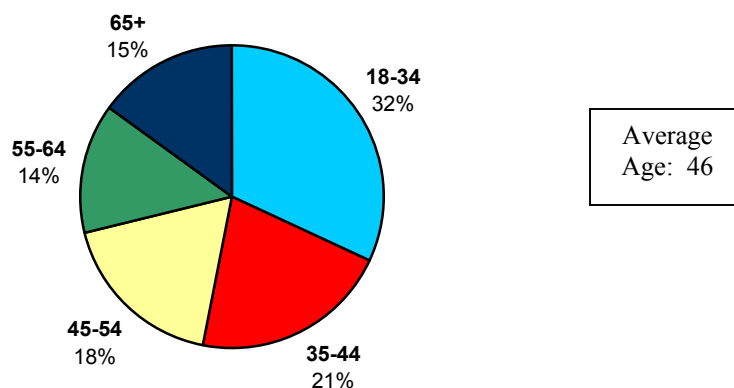
VISITOR DEMOGRAPHICS (Non-resident Visitors)

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. (Note: Someone other than the head of household may have also been in the travel party.) See page 25 for a summary chart of demographic variables.

Age

Non-resident Generation X and Y households, those aged 18-34, accounted for one third (32%) of trips to Louisiana in 2003. Twenty-one percent of trips were taken by Baby Boomer households between 35 and 44 years old, and eighteen percent of household trips involved Baby Boomer travelers between 45 to 54 years of age. Three in ten (29%) household trips to Louisiana were taken by Mature travelers, aged 55 years or older. A higher share (32%) of Generation X and Y non-resident households traveled in Louisiana than in the U.S. as a whole (28%).

Age of Louisiana Visitors in 2003
(percent of non-resident households)



Household Size

One in five (28%) non-resident households visiting Louisiana in 2003 were single-person households. Over half (50%) included two or three members (36% two-member, 14% three-member). Twenty-two percent of non-resident visiting households included four or more members.

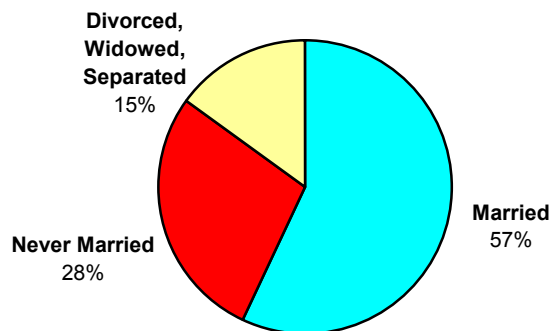
Children in Household

Three in ten (31%) non-resident trips to Louisiana were taken by households with children. In visiting households with children, there were an average of 1.7 children in the household. Fourteen percent of non-resident visiting households had just one child in the home, while 17 percent had two or more children.

Marital Status

A majority (57%) of non-resident trips to Louisiana were taken by married households. About three in ten (28%) were taken by those who never married, and 15 percent by those who are divorced, widowed, or separated.

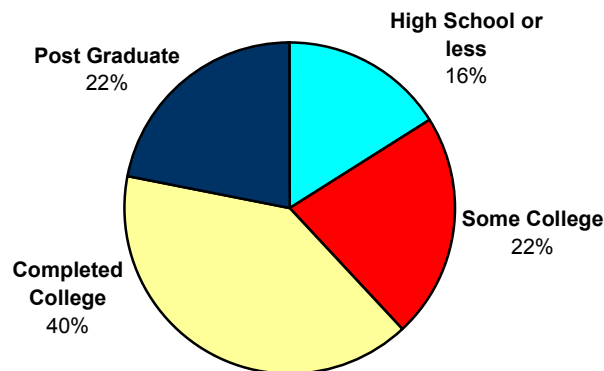
Marital Status of Louisiana Visitors in 2003
(percent of non-resident households)



Education

A majority (62%) of non-resident trips to Louisiana were taken by households headed by someone with a college degree (40%) or who had done some post graduate work (22%). One in five (22%) trips were generated by households headed by someone with some college education. In 16 percent of visiting households, the head of household had a high school education or less. Resident visitors were more likely than non-resident visitors to have a high school education or less (31% vs. 16%).

Education of Louisiana Visitors in 2003
(percent of non-resident households)



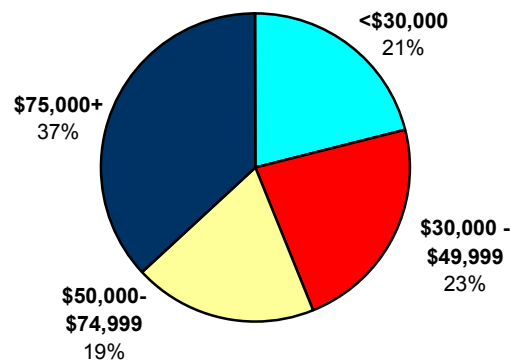
Employment

Seventy-three percent of non-resident households visiting Louisiana in 2003 were employed full-time. Six percent were employed part-time and six percent were unemployed. Fifteen percent of non-resident households visiting Louisiana in 2003 were retired.

Income

The average annual income of non-resident households visiting Louisiana was \$70,400 in 2003, slightly higher than the average for U.S. traveling households (\$69,500). Among non-resident households taking Louisiana trips in 2003, 21 percent had annual incomes below \$30,000, 23 percent had incomes between \$30,000 and \$50,000, 19 percent had incomes between \$50,000 and \$75,000, and 37 percent had incomes of \$75,000 or more.

**Average Annual Household Income
of Louisiana Visitors in 2003**
(percent of non-resident households)



Average (mean) income = \$70,400

Lifestage

Non-resident households taking trips to Louisiana most often (37%) reflected the Parents lifestage. Couples accounted for 31 percent of non-resident visiting households. Singles accounted for 28 percent of Louisiana trips, and roommates four percent.

Resident households traveling in Louisiana in 2003 most often reflected Young Parent or Older Parent households and less likely Young, Middle, or Older Singles households, as well as Young Couple Households. (See Appendix C for definitions of Lifestage groups.)

Lifestage of Louisiana Visitors in 2003

(percent of non-resident household trips)

<u>Singles</u>	28%
Young Singles	17%
Middle Singles	6%
Older Singles	5%
<u>Couples</u>	31%
Young Couple	10%
Working Older Couple	12%
Retired Older Couple	9%
<u>Parents</u>	37%
Young Parent	15%
Middle Parent	8%
Older Parent	14%
<u>Roommates</u>	4%

PRIZM Clusters*

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 between clusters and social groups: Social Rank (including income and education), Household Composition, Mobility, Ethnicity, Urbanization and Housing. Individual clusters are organized into 15 distinct social groups. (See appendix C, Glossary of Terms, for more detailed descriptions of the above social groups and clusters.)

Households from the Elite Suburbs social group generate the largest share of non-resident trips to Louisiana. About 16 percent of non-resident trips to Louisiana in 2003 were taken by households in the Elite Suburbs social group. These are high education, high income households in mostly white-collar professions. More than 10 percent of trips to Louisiana in 2003 were taken by households in the 2nd City Centers social group that are mostly from mid-scale, middle density, satellite cities around major metropolitan areas or smaller cities. More than 10 percent of trips to Louisiana in 2003 were also taken by households in the Landed Gentry social group, which is the fourth most affluent group. Just under 10 percent of non-resident trips are generated by the Rustic Living social group. This social group is comprised of lower to middle income households predominately from smaller towns.

Top PRIZM Social Groups

(percent of 2003 non-resident Louisiana household-trips)

<u>Group</u>	<u>Percent</u>
Elite Suburbs	15.9%
2 nd City Centers	10.4%
Landed Gentry	10.4%
Rustic Living	9.6%

The top clusters traveling to Louisiana in 2003 predominately involved moderately high to high-income households, and represented a range of urbanization levels. Kids & Cul-de-sacs, from the Elite Suburbs social group, was the largest cluster. These mostly large city suburban households accounted for 6.9 percent of non-resident household trips to Louisiana. God's Country households, from the Landed Gentry social group, provided 4.4 percent of non-resident trips to the state. These households predominately reside outside the metropolitan beltways in coastal areas and uplands.

Top PRIZM Clusters

(percent of 2003 non-resident Louisiana household-trips)

<u>Cluster</u>	<u>Percent</u>	<u>Social Group</u>	<u>Affluence Level</u>
Kids & Cul-de-Sacs	6.9%	Elite Suburbs	A
God's Country	4.4	Landed Gentry	A
Winner's Circle	3.9	Elite Suburbs	A
Towns and Gowns	3.5	2 nd City Centers	C
Scrub Pine Flats	3.2	Rustic Living	C
Second City Elite	2.9	2 nd City Society	A
Middle America	2.9	Exurban Blues	C
Middleburg Managers	2.7	2 nd City Centers	B
Greenbelt Families	2.7	Landed Gentry	B
Single City Blues	2.7	Urban Cores	C

<p>Affluence Level: A: High education, high income B: Moderately high income C: Moderate or moderately low income, mostly blue collar</p>

The top 10 PRIZM clusters by PRIZM Development Index* (measuring travel propensity) account for a quarter (26%) of non-resident household trips to Louisiana. The high propensity clusters show a mix of high-end and low-end socioeconomic groups, and varying levels of urbanization. Four of the top 10 clusters for travel potential to Louisiana are also in the top 10 list by volume of visiting households (Kids & Cul-de-Sacs, Country Squires, Scrub Pine Flats, and Single City Blues).

2003 Top 10 PRIZM Cluster Development Index for Non-resident Louisiana Visitors						
PRIZM Cluster	U.S. Domestic Household Trips (000)	Percent of U.S. Domestic Household Trips	Total Non-resident LA Trips (000)	Percent of Non-resident LA Trips	HH Trip Volume Rank	INDEX
Country Squires	8,648	1.3%	401	3.5%	4	258
Scrub Pine Flats	8,022	1.2%	368	3.2%	5	255
Single City Blues	6,756	1.0%	308	2.7%	10	253
Southside City	6,036	0.9%	239	2.1%	15	220
Boomtown Singles	4,833	0.8%	185	1.6%	25	212
Bohemian Mix	8,226	1.3%	297	2.6%	11	201
Norma Rae-ville	6,502	1.0%	209	1.8%	18	179
Kids & Cul-de-Sacs	26,506	4.1%	796	6.9%	1	167
New Beginnings	6,216	1.0%	178	1.5%	27	159
Hispanic Mix	2,910	0.5%	70	0.6%	54	133

* The PRIZM Cluster Development Index is calculated for each PRIZM cluster to measure the propensity of U.S. traveling households in each cluster to take trips to Louisiana. This is calculated by dividing the share of non-resident trips to Louisiana taken by each cluster by the share of all U.S. trips taken by each cluster and multiplying by 100. For example, Country Squires households take 1.3 percent of all U.S. household trips, yet they take 3.5 percent of non-resident household trips to Louisiana, creating a Business Development index of 258. The baseline index of 100 represents equality in the proportion of U.S. household trips for a cluster with the proportion of non-resident Louisiana trips for a cluster. For a more complete chart, please see Appendix G.

Summary Table of Visitor Demographics

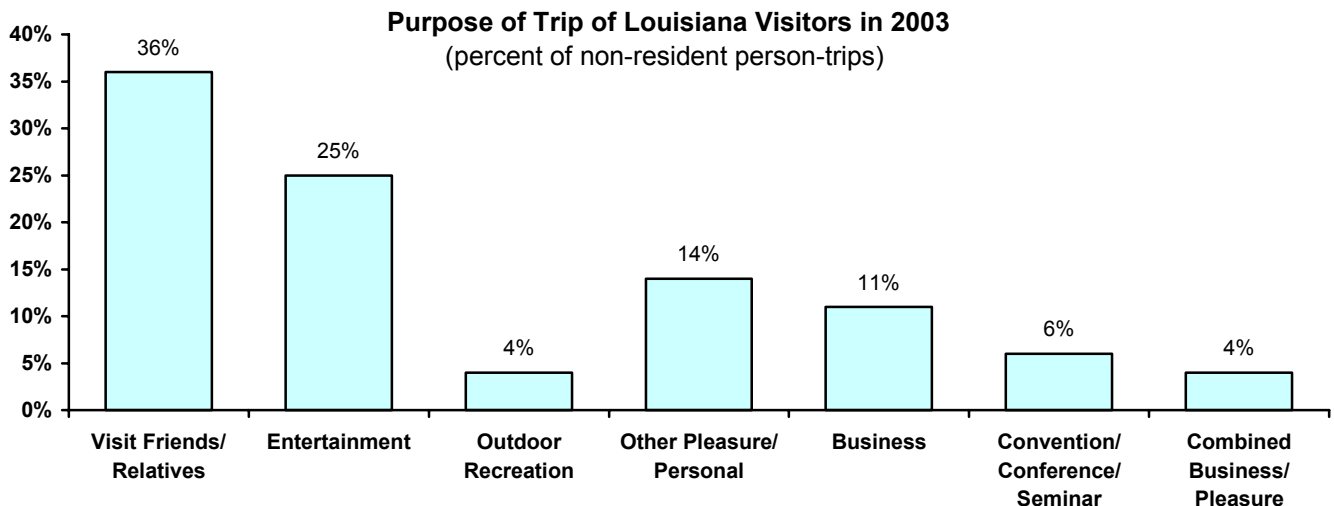
TRAVELING HOUSEHOLD DEMOGRAPHICS (household trips)	Total U.S.	Louisiana, 2003				
		Total Louisiana	Resident	Non- Resident	Leisure	Bus/Conv.
Age of Household Head						
18-34	28%	31%	27%	32%	34%	26%
35-54	42	39	40	39	35	52
55+	30	30	33	29	31	22
Average (mean) age	47 years	46 years	47 years	46 years	46 years	45 years
Household Size						
One person	23%	26%	18%	28%	27%	22%
Two people	35	36	33	36	36	34
Three people	17	15	21	14	15	17
Four people	15	14	14	14	13	17
Five or more people	10	9	14	8	9	10
Children in Household						
None	66%	67%	59%	69%	68%	64%
One	16	15	17	14	14	17
Two	12	13	15	13	14	12
Three or more	6	5	9	4	4	7
Mean (excluding none)	1.8	1.8	1.8	1.7	1.7	1.7
Marital Status						
Married	62%	57%	60%	57%	55%	65%
Never married	22	25	13	28	26	20
Divorced, Widowed, Separated	16	18	27	15	19	15
Education						
High school education or less	18%	20%	31%	16%	22%	12%
Some college – no degree	24	24	32	22	26	17
Completed College	38	37	29	40	37	42
Post graduate work	20	19	8	22	15	29
Employment						
Full-time	74%	71%	63%	73%	67%	85%
Part-time	7	7	8	6	7	6
Retired	15	16	20	15	19	5
Not employed	5	6	9	6	7	4
Annual Household Income						
Less than \$30,000	21%	24%	35%	21%	29%	10%
\$30,000-\$49,999	22	24	25	23	25	17
\$50,000-\$74,999	21	19	18	19	19	19
\$75,000 or more	36	33	22	37	27	54
Mean	\$69,500	\$66,100	\$51,700	\$70,400	\$58,700	\$90,100

Demographics are for the head of household.

TRIP CHARACTERISTICS (Non-resident Visitors)**Primary Purpose of Trip**

The majority of non-resident visitors to Louisiana traveled for leisure purposes in 2003. Leisure visitors generated four out of five (79%) non-resident person-trips to Louisiana. Leisure visitors are travelers whose purpose is visiting friends and relatives, entertainment, outdoor recreation, or other pleasure/personal reasons. Visiting friends/relatives accounted for over one third (36%) of all non-resident person-trips to Louisiana. A quarter (25%) of Louisiana person-trips were for entertainment purposes. Travel to Louisiana for other pleasure/personal reasons accounted for 14 percent of non-resident person-trips in 2003.

In 2003, seventeen percent of non-resident visitors traveled to Louisiana for business or convention purposes and four percent for combined business and pleasure purposes.

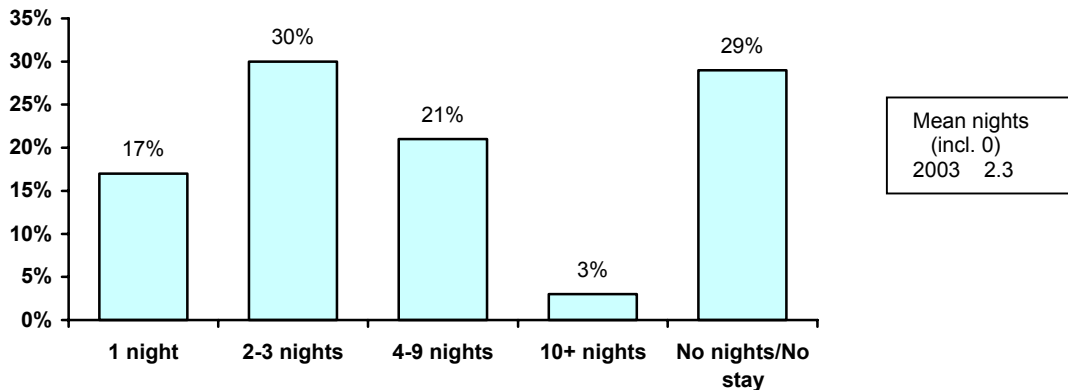


Length of Stay

Seven in ten (71%) Louisiana non-resident visitors spent one or more nights in the state in 2003. Overnight trips lasted an average of 3.3 nights. Including day trips, non-resident Louisiana trips lasted 2.3 nights, on average.

Nearly half (47%) of non-resident visitors to Louisiana spent just one night (17%) or 2-3 nights in the state (30%). One in five (21%) spent from 4-9 nights in the state. Three in ten (29%) were visiting just for the day.

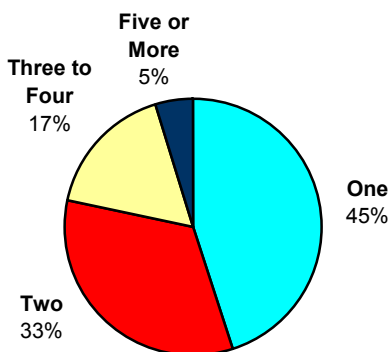
Length of Stay of Louisiana Visitors in 2003
(percent of non-resident person-trips)



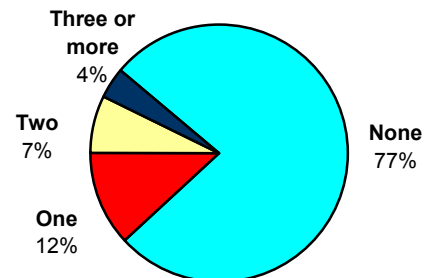
Travel Party Size and Presence of Children

Nearly half (45%) of non-resident trips to Louisiana involved one person from the household. One third of trips (33%) included two household members, while 22 percent of trips involved three or more household members. One quarter (23%) of non-resident trips to Louisiana in 2003 involved children. Residents (30%) were more likely to travel with children than non-residents (23%).

Household Travel Party Size*, 2003
(percent of non-resident household trips)



Presence of Children on Trip, 2003
(percent of non-resident household trips)



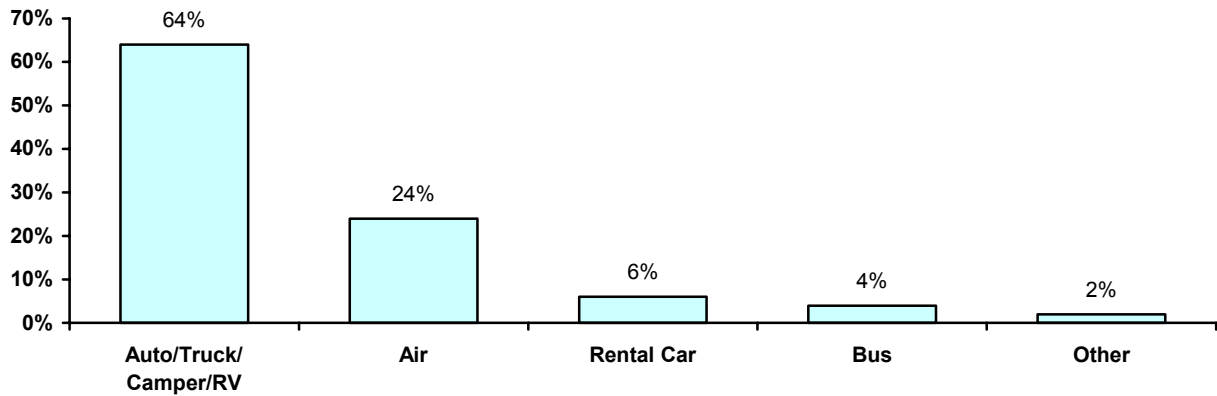
* The travel party may have included other non-household members.

Average Number of children on trip: 1.8

Primary Mode of Transportation

In Louisiana, as in the U.S. as a whole, the majority of travel is by personal auto or truck or camper/RV. In 2003, 64 percent of non-resident person-trips to Louisiana were by auto, truck or camper. Six percent of non-resident visitors to the state used rental cars as a primary mode of transportation, and three percent used a rental car as a secondary mode of transportation. A quarter (24%) of Louisiana non-resident person-trips were by air. Other transportation types, including bus, train and boat, accounted for six percent of person-trips.

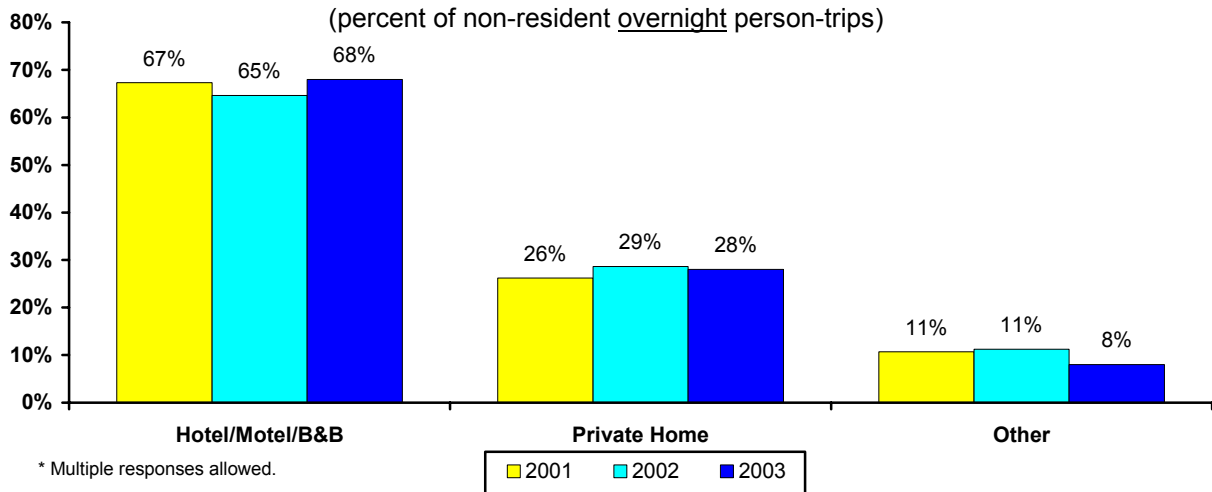
Primary Mode of Transportation of Louisiana Visitors in 2003
(percent of non-resident person-trips)



Lodging Use

Of the 13.5 million non-resident overnight visitors to Louisiana, two thirds (68%) included stays in hotels, motels or B&Bs. The share of non-resident visitors using hotels was up slightly from 2002 (65% in 2002 vs. 68% in 2003). Almost one in three (28%) non-resident overnight visitors stayed in a private home, while eight percent stayed in other lodging accommodations.

Lodging Use of Louisiana Visitors in 2003*
(percent of non-resident overnight person-trips)



Note: Volume of person-trips including hotel, motel or B&B use does not necessarily equate to room nights. Multiple persons can occupy one room.

Month and Season of Travel

In 2003, summer had the highest share of travel (29% total and 30% non-resident). The heaviest single months for overall person-trips were June (10%), July (10%) and November (10%). Spring was the slowest season (23% total and 22% non-resident).

Travel by Season to Louisiana, 2003 (percent of person-trips)

	<u>Total</u>	<u>Non-resident</u>		<u>Total</u>	<u>Non-resident</u>
<u>Winter</u>	24%	24%	<u>Summer</u>	29%	30%
January	6	7	June	10	12
February	9	8	July	10	10
December	9	9	August	9	8
<u>Spring</u>	23%	22%	<u>Fall</u>	24%	24%
March	7	7	September	7	6
April	8	8	October	7	7
May	8	7	November	10	11

Cities Visited

New Orleans is the most popular city destination within Louisiana. Four in ten (44%) non-resident visitors traveled to New Orleans in 2003. Thirteen percent of non-resident person-trips were to Shreveport, eight percent to Baton Rouge, seven percent to Lake Charles and five percent to Lafayette. (See Appendix G for explanation of city volume estimates.)

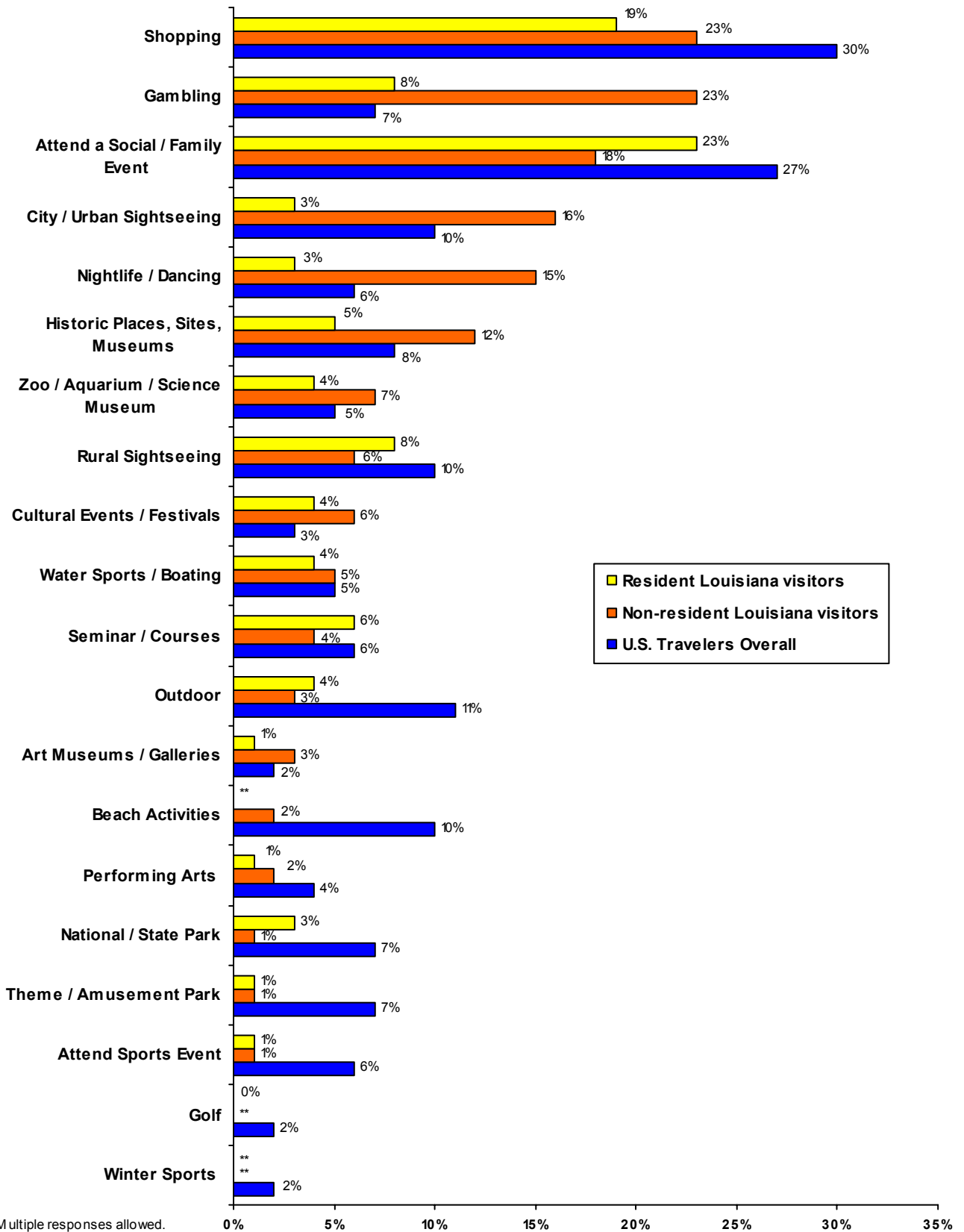
2003 Top Cities Visited within Louisiana (percent/count of non-resident person-trips)		
City	Percent*	Estimated Volume Count
New Orleans	44%	8,437,000
Shreveport	13	2,413,000
Baton Rouge	8	1,460,000
Lake Charles	7	1,324,000
Lafayette	5	1,007,000
Monroe	2	371,000
Alexandria	1	251,000

* Travelers may visit multiple cities on the same trip.

Trip Activities

Gambling and shopping remain the most popular activities for non-resident visitors to Louisiana. In 2003, a quarter (23%) of non-resident visitors included gambling as a trip activity, compared to just eight percent of resident visitors. Nationally, just seven percent of travelers gamble while on a trip. Shopping is the most popular activity for U.S. domestic travelers overall (30%), and it is engaged in on 23 percent of non-resident person-trips. Attending a social/family event was the most popular activity for resident visitors (23%) and third most popular for non-resident visitors (18%). City/urban sightseeing (16% vs. 3%) and visiting historic places/sites/museums (12% vs. 5%) are more popular on person-trips for non-resident visitors than for resident visitors.

**Trip Activities by 2003 Travelers*
(percent of person-trips)**



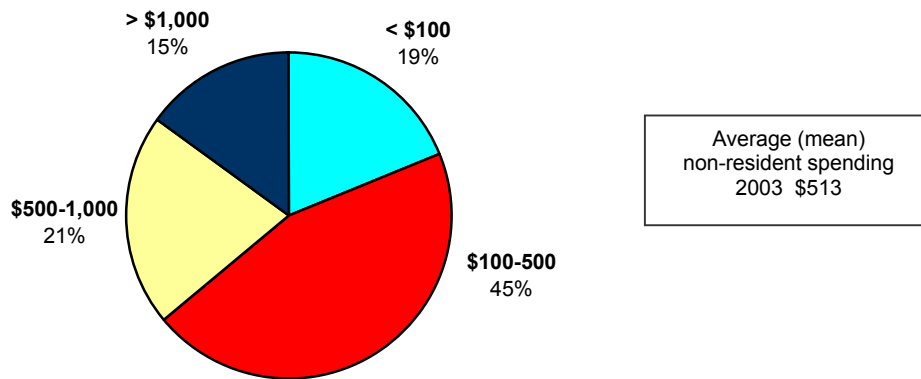
* Multiple responses allowed.

**Less than 0.5%.

Spending*

Non-resident households visiting Louisiana spent an average of \$513 while visiting the state. Forty-five percent of non-resident visitors spent between \$100 and \$500 while in Louisiana. One third (36%) of trips to Louisiana involved \$500 or more in spending. Just one in five (19%) non-resident visitors spent less than \$100. Residents spent less than non-resident visitors. Average spending per resident household was just \$158 in 2003.

Spending In-state by Louisiana Visitors in 2003
(percent of non-resident household-trips)



* Average spending is based on spending at the destination. It does not include all transportation expenses.

Average spending differs considerably by state of origin. In this section, spending habits of visiting households from the top five origin states are analyzed using data from 2003. During 2003, households visiting from California spent the most on average (\$684), followed by Florida (\$549). Mississippi visitors spent the least (\$224). However, there were much fewer high-spending California households visiting the state. Texas provided the most total dollars to the Louisiana economy based on the consideration of both average trip spending and travel volume.

Average Trip Spending per Household by State of Origin for Louisiana Visitors
(based on 2003 household-trips)

State of Origin	Average Spending In Louisiana (per household per trip)	Number of Trips Per Year (in thousands of household trips)
Total Non-resident	\$513	11,591
California	\$684	563
Florida	\$549	661
Texas	\$425	5,385
Alabama	\$326	538
Mississippi	\$224	870

(Note: The above spending figures are based on spending at the destination only and do not include all transportation costs.)

Other States Visited

In 2003, 19 percent of non-resident Louisiana visitors also visited Mississippi, while 17 percent also visited Texas on the same trip. One in ten (10%) also included Alabama on their trip. Other states with significant cross travel include Florida, Arkansas, Georgia, Tennessee and North Carolina.

2003 Other States Visited on Louisiana Trips (percent of person-trips)		
State	Total Visitors	Non-resident Visitors
Mississippi	16%	19%
Texas	14%	17%
Alabama	8%	10%
Florida	6%	7%
Arkansas	3%	4%
Georgia	2%	3%
Tennessee	1%	2%
North Carolina	1%	2%

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 of African-American households is too small to consider segmenting travel by residence; therefore the following information is based on all African-American travelers in the state. The sample of African-American households visiting Louisiana is of sufficient size to represent the travel trends and travel characteristics of this group.

In addition, there is a known under representation of minority households in the consumer panel used for this survey. The following data are based on those African-American traveling households in the panel; therefore, volume estimates may not fully account for African-American travel volumes.

African-American Travel to Louisiana

Louisiana has a high share of African-American visitors. In 2003, Mississippi ranked first and Louisiana ranked second in share of African-American travel among all fifty states. African-American households generated 15 percent of person-trips in Mississippi and 14 percent of person-trips in Louisiana. Other minority groups accounted for three percent of Louisiana person-trips. South Carolina (12%), Georgia (10%) and North Carolina (10%) also had high shares of African-American visitors in 2003. This is not surprising as these states have higher-than-average African-American populations, and states of residence are correlated with states of destination.

States With Large Shares (10%+) of African-American visitors, 2003

<u>State</u>	<u>Percent of State's Person-trip Visitors</u>
Mississippi	15%
Louisiana	14
South Carolina	12
Georgia	10
North Carolina	10

Trip Characteristics

An estimated 3.5 million African-Americans traveled in the state in 2003. African-American visitors to Louisiana most often traveled for leisure (87% of person-trips). Business travel represented 13 percent of African-American person-trips to Louisiana in 2003.

African-American travelers to Louisiana in 2003 were similar to Louisiana travelers in general in that they traveled most for leisure, traveled mostly by car, enjoyed shopping, attending social/family events, gambling, and participating in nightlife/dancing. There were also several differences between African-American and overall visitors to Louisiana. Compared to overall visitors, African-American visitors to Louisiana were:

- More likely to be traveling for the purpose of visiting family and friends (48% African-American vs. 36% total) and less likely to be traveling for business (13% African-American vs. 21% total).
- Less likely to travel to Louisiana by air (10% African-American vs. 19% total) but were more likely to use a rental car as a primary mode of transportation (12% African-American vs. 5% total).
- More likely to travel in the summer months, June-August (33% African-American vs. 29% total).
- More likely to take a day trip (43% African-American vs. 35% total).
- Less likely to stay in a hotel, motel or B&B (54% African-American vs. 63% total).
- More likely to attend social or family events (29% African-American vs. 19% total).
- Less likely to travel alone (35% African-American vs. 45% total) and more likely to travel with children (39% African-American vs. 24% total).
- Less likely to be married (47% African-American vs. 57% total) and more likely to have children in the household (57% vs. 33% total).
- Younger, on average (household head 43 years old, African-American vs. 46 years old, total).
- Less likely to have average annual household incomes of \$50,000 or more (34% African-American vs. 52% total).
- Spending slightly less per household on Louisiana trips (\$256 African-American vs. \$433 total).

ORIGIN PROFILES

This section of the report examines the characteristics of travelers to Louisiana by origin state. Visitors from Texas, Mississippi, Florida, Alabama and California are profiled based on data from 2003. Visitors by origin state are compared to all 2003 non-resident travelers to Louisiana.

Visitors from Texas are:

- ◆ More likely to travel to Louisiana for leisure purposes (87% TX vs. 79% total non-resident)
- ◆ More likely to travel by auto, truck, RV, or rental car (83% TX vs. 70% total non-resident)
- ◆ Less likely to spend the night (66% TX vs. 71% total non-resident)
- ◆ Spending less per household per trip (\$425 TX vs. \$513 total non-resident)
- ◆ More likely to visit Shreveport (21% TX vs. 17% total non-resident) and less likely to visit New Orleans (21% vs. 53%) and Baton Rouge (5% vs. 9%)
- ◆ More likely to gamble while visiting Louisiana (34% TX vs. 23% total non-resident) and less likely to shop (14% vs. 23%) or gamble (9% vs. 16%)
- ◆ From households with slightly lower average annual incomes (\$64.5K TX vs. \$70.4K total non-resident)

Visitors from Mississippi are:

- ◆ More likely to travel to Louisiana for leisure purposes (90% MS vs. 79% total non-resident)
- ◆ More likely to travel by auto, truck, RV or rental car (90% MS vs. 70% total non-resident)
- ◆ Less likely to spend the night (58% MS vs. 71% total non-resident)
- ◆ Less likely to stay in a hotel, motel or B&B (54% MS vs. 68% total non-resident)
- ◆ Less likely to visit New Orleans (41% vs. 53%), Shreveport (0% vs. 17%) or Lake Charles (4% vs. 9%)
- ◆ Less likely to gamble while visiting Louisiana (3% MS vs. 23% total non-resident) and engage in city/urban sightseeing (4% vs. 16%)
- ◆ Spending less (\$224 MS vs. \$513 total non-resident)
- ◆ More likely to be from African-American households (16% MS vs. 13% total non-resident)
- ◆ From households with slightly lower average annual incomes (\$64.5K MS vs. \$70.4K total non-resident)
- ◆ More likely to have children in the household (25% MS vs. 31% total non-resident)

Visitors from Florida are:

- ◆ More likely to travel by air (30% FL vs. 24% total non-resident)
- ◆ Less likely to spend the night (63% FL vs. 71% total non-resident)
- ◆ More likely to visit New Orleans (59% FL vs. 53% total non-resident) and less likely to visit Shreveport (1% vs. 17%), Lake Charles (0% vs. 9%) or Lafayette (0% vs. 7%).
- ◆ Less likely to gamble (19% FL vs. 23% total non-resident), attend social/family events (6% vs. 18%) or participate in nightlife/dancing (10% vs. 15%) and more likely to shop (33% vs. 23%) or engage in city/urban sightseeing (22% vs. 16%).
- ◆ Less likely to be from African-American households (5% FL vs. 13% total non-resident)
- ◆ From households with slightly lower average annual incomes (\$67.5K FL vs. \$70.4K total non-resident)

Visitors from Alabama are:

- ◆ More likely to travel to Louisiana for business purposes (27% AL vs. 21% total non-resident)
- ◆ More likely to travel by auto, truck, RV or rental car (85% AL vs. 70% total non-resident)
- ◆ Less likely to spend the night (68% AL vs. 71% total non-resident)
- ◆ Less likely to stay in a hotel, motel or B&B (62% AL vs. 68% total non-resident)
- ◆ Less likely to gamble (6% AL vs. 23% total non-resident) and more likely to shop (30% vs. 23%) or engage in city/urban sightseeing (27% vs. 16%)
- ◆ Less likely to visit Shreveport (3% AL vs. 17% total non-resident), Lake Charles (1% vs. 9%), Lafayette (0% vs. 7%) or Baton Rouge (3% vs. 9%) and more likely to visit New Orleans (70% vs. 53%)
- ◆ More likely to be from African-American households (32% AL vs. 13% total non-resident)
- ◆ Spending less (\$326 AL vs. \$513 total non-resident)
- ◆ Slightly older (avg. age 49 years AL vs. 46 total non-resident)

Visitors from California are:

- ◆ Most likely to be traveling for business purposes (28% CA vs. 21% total non-resident)
- ◆ More likely to travel by air (71% CA vs. 24% total non-resident)
- ◆ More likely to stay overnight (84% CA vs. 71% total non-resident)
- ◆ More likely to stay in a hotel, motel or B&B (81% CA vs. 68% total non-resident)
- ◆ More likely to shop while visiting the state (40% CA vs. 23% total non-resident), participate in nightlife/dancing (41% vs. 15%) and engage in city/urban sightseeing (46% vs. 16%) and less likely to attend social/family events (2% vs. 18%)
- ◆ More likely to visit New Orleans (75% CA vs. 53% total non-resident) and less likely to visit Shreveport (9% vs. 17%), Baton Rouge (5% vs. 9%) or Lake Charles (3% vs. 9%) or Lafayette (0% vs. 7%)
- ◆ Less likely to be from African-American households (10% CA vs. 13% total non-resident)
- ◆ Spending more (\$684 CA vs. \$513 total non-resident)
- ◆ From households with high average annual incomes (\$89.9K CA vs. \$70.4K total non-resident)
- ◆ Slightly younger (avg. age 41 years CA vs. 46 total non-resident)

Summary Table of Trip Characteristics by Origin State

TRIP CHARACTERISTICS	Louisiana Non- resident Visitors (2003)	Top Origin States of Louisiana Visitors* (based on data from 2003)				
		Texas	Mississippi	Florida	Alabama	California
Non-resident Louisiana visitors						
Person-trips	100%	48%	7%	6%	5%	4%
Household-trips	100%	46%	8%	6%	5%	5%
TRIP CHARACTERISTICS - in person-trips						
Primary Purpose of Trip						
Leisure	79%	87%	90%	81%	73%	72%
Business	21	13	10	19	27	28
Primary Mode of Transportation						
Auto (car/truck/RV/rental car)	70%	83%	90%	61%	85%	24%
Air	24	12	6	30	11	71
Trip Duration						
Percent Overnight	71%	66%	58%	63%	68%	84%
Average trip duration (including day-trips)	2.3 nights	1.9 nights	1.1 nights	1.8 nights	1.9 nights	4.6 nights
Average OVERNIGHT trip duration	3.3 nights	2.8 nights	2.0 nights	2.9 nights	2.8 nights	5.5 nights
Lodging Use (% overnight person-trips)						
Hotel/Motel/B&B	68%	66%	54%	89%	62%	81%
Private Home	28	28	52	7	8	32
Top Activities						
Gambling	23%	34%	3%	19%	6%	26%
Shopping	23	14	18	33	30	40
Attend a Social/family Event	18	20	22	6	14	2
City/Urban Sightseeing	16	9	4	22	27	46
Nightlife/Dancing	15	11	13	10	19	41
Top MSAs of Destination						
New Orleans	53%	21%	41%	59%	70%	75%
Shreveport	17	21	--	1	3	9
Baton Rouge	9	5	9	10	3	5
Lake Charles	9	11	4	--	1	3
Lafayette	7	8	5	--	--	--
Race						
Non-minority	83%	84%	81%	90%	68%	71%
African-American	13	14	16	5	32	10
TRIP CHARACTERISTICS - in household-trips						
Trip Spending						
Average trip spending per household	\$513	\$425	\$224	\$549	\$326	\$684
DEMOGRAPHICS - in household-trips						
Household Income						
Average annual income	\$70,400	\$64,500	\$64,500	\$67,500	\$70,300	\$89,900
Age of Household Head						
Average age	46	45	46	47	49	41
Children in Household						
Percent with children	31%	33%	25%	31%	35%	21%

Demographics are for the head of household.

*Caution, small sample size.

COMPETITIVE COMPARISON

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

Volume Trends

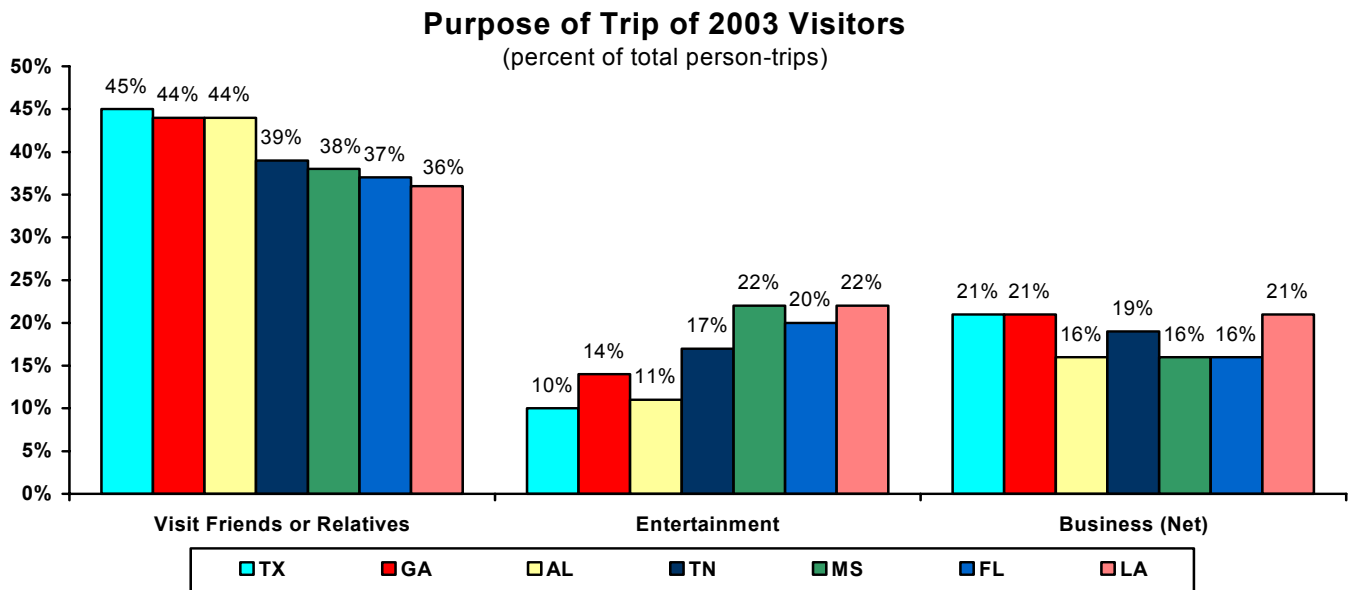
Four of the six competitive states and Louisiana experienced growth in travel volume in 2003 over 2002. The largest increase was seen in Georgia, with a 2.9 percent increase in volume over 2002. Alabama (+2.2%) and Tennessee (+1.7%) both saw about the same increase as Louisiana (+2.0%) above 2002 volumes. Florida travel volume increased moderately (+0.8%). Mississippi (-2.0%) and Texas (-1.1%) saw decreases in travel volume in 2003.

Three quarters (76%) of Louisiana person-trips are non-resident travelers. Mississippi (71%) experienced the highest proportion of non-resident travel across these competitive states. Tennessee (66%), Georgia (64%) and Alabama (63%) had a similar share of non-resident travel. Over half (56%) of person-trips to Florida were by out-of-state travelers. Across the competitive states, Texas had the lowest proportion of non-resident travel (28%).

Competitive States' Visitor Volumes, 2003			
Visitors to:	Total Visitor Volume (in millions of person-trips)	Percent Change from 2002	Percent non- resident travel
Louisiana	25.1 million	+2.0%	76%
Florida	90.3	+0.8%	56
Texas	81.9	-1.1%	28
Georgia	48.0	+2.9%	64
Tennessee	42.8	+1.7%	66
Alabama	27.1	+2.2%	63
Mississippi	23.3	-2.0%	71

Purpose of Trip

Reasons for traveling were generally similar across the competitive set of six states in 2003, with a few exceptions. While visiting friends and relatives was the most common purpose of trip across all states, Texas had the highest share (45%) of travel to visit friends or relatives and Louisiana had the lowest share (36%). Trips for entertainment purposes were more predominant in Louisiana (22%), Mississippi (22%), and Florida (20%). Business trips accounted for roughly a fifth of person-trips to each state.



Transportation Mode

The proportion of auto travel (car/truck/camper/RV) to Louisiana (76% of person-trips) was similar to the national domestic travel average (81%) in 2003. Yet, the share of travel by primary mode of transportation differed considerably among the competitive states. States with higher than average shares of auto travel included Mississippi (90%), Alabama (90%) and Tennessee (87%). Texas and Georgia had similar rates of auto travel (81% and 82%, respectively), while Florida visitors traveled much less by auto (68%) and more by air (28%). Nineteen percent of Louisiana visitors traveled by air, as did 17 percent of Texas visitors and 15 percent of Georgia visitors. Ten percent or less of person-trips to Tennessee (10%), Alabama (9%) and Mississippi (5%) were by air.

Trip Duration

Florida had the longest average in-state trip duration (4.1 nights) and the smallest share of day trips (17%) in 2003. Texas visitors stayed an average of 2.3 nights, while Louisiana visitors averaged 2.0 nights in the state. Twenty-nine percent of Texas person-trips were for day-trips only, compared to 35 percent of Louisiana person-trips. Shorter average trip durations were seen in Mississippi (1.4), Georgia (1.8), Tennessee (1.9) and Alabama (1.8). Alabama had the highest share of day trip travel (48%), while fewer person-trips to Mississippi (45%), Georgia (43%) and Tennessee (39%) were for day-trips.

Lodging Use

Hotels, motels and B&Bs were the most popular form of lodging across all competitive states and in Louisiana in 2003. The share of hotel/motel/B&B use by overnight visitors was highest in Mississippi (64%), Louisiana (63%) and Tennessee (57%). Over half of visitors to Florida (55%), Georgia (54%) and Texas (51%) used hotels, motels and B&Bs. Alabama visitors were least likely to use hotels, motels and B&Bs (45%).

Private home use was the second most popular lodging type. Four in ten visitors to Texas (40%), Alabama (40%) and Georgia (39%) stayed in private homes. Around a third of visitors to Florida (34%), Tennessee (32%), Louisiana (30%) and Mississippi (29%) used private home lodging.

Florida (14%) and Alabama (10%) were the only competitive states with any substantial levels of condo/time share use.

Activities

Shopping was the most popular activity in five of the six competitive states, as it was for U.S. domestic travelers overall (30%). About three in ten visitors to Florida (30%), Texas (27%) and Tennessee (27%) enjoyed shopping while in the state. Twenty-two percent of Louisiana visitors participated in shopping activities, similar to Georgia (22%) and Alabama (19%). Just 17 percent of Mississippi visitors enjoyed shopping as an activity.

Louisiana and Mississippi were the only competitive states with significant levels of gambling activity. Gambling was the most popular activity in Mississippi, where 27 percent of Mississippi person-trips involved gambling. One in five (19%) Louisiana person-trips included gambling while in the state, tying it with attending social/family events for the second most popular activity after shopping. Attending family/social events was the second most popular activity with overall U.S. domestic travelers (27%).

In-State Trip Activities Comparison for 2003 Visitors							
(percent of person-trips)							
	Louisiana	Texas	Mississippi	Alabama	Tennessee	Georgia	Florida
<u>Trip Activities*</u>							
Shopping	22%	27%	17%	19%	27%	22%	30%
Attend a Social/Family Event	19	27	14	16	16	17	17
Gambling	19	1	27	1	1	1	1
City/Urban Sightseeing	13	9	4	4	8	7	8
Nightlife/Dancing	12	5	3	3	5	4	7
Historic Places, Sites, Museums	10	8	3	4	7	7	6
Rural Sightseeing	7	6	4	5	8	8	6
Zoo/Aquarium/Science Museum	7	5	2	3	7	2	6
Cultural Events/Festivals	6	3	1	1	2	2	2
Seminar/Courses	5	6	3	4	4	6	6
Water Sports/Boating	4	6	3	5	4	4	5
Outdoor	3	9	5	5	6	6	8
Art Museums/Galleries	3	1	**	1	1	1	1
Performing Arts	2	3	2	1	4	1	3
National/State Park	2	3	2	2	7	5	5
Beach Activities	1	6	4	9	1	3	27
Theme/Amusement Park	1	5	1	2	6	4	24
Attend Sports Event	1	3	1	3	2	1	7
Golf	**	1	1	2	1	2	4
Winter Sports	**	**	**	**	**	**	**

*Multiple responses allowed.

**Less than 0.5%.

Competitive States' Visitors Also Visiting Louisiana Within the Same Trip

When we look at visitors to nearby competitive states, we see a significant level of crossover among states visited on a single trip. Of all visitors to Texas in 2003, four percent (or 3.5 million) also visited Louisiana on the same trip. Eighteen percent of Mississippi's 23.3 million visitors also visited Louisiana, as did 7 percent of Alabama's 27.1 million visitors, two percent of Florida's visitors and one percent each of Tennessee's and Georgia's visitors.

Competitive States' Visitors Also Visiting Louisiana, 2003			
Visitors to:	Total Visitor Volume (in millions of person-trips)	Percent also visiting Louisiana on the same trip	Actual Volume (in millions of person-trips)
Texas	81.9 million	4.3%	3.5 million
Mississippi	23.3	17.5%	4.1
Alabama	27.1	7.4%	2.0
Florida	90.3	1.6%	1.5
Tennessee	42.8	0.8%	0.4
Georgia	48.0	1.1%	0.5

APPENDICES

SURVEY 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),
- 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.

Estimate of Sampling Error

	<u>Sample Size</u>	<u>Sampling Error*</u>
Total Households	57,839	+/- 0.4%
Louisiana visiting households	1,202	+/- 2.8%
Non-resident households visiting Louisiana	955	+/- 3.2%
African-American households visiting Louisiana	132	+/- 8.5%

* At the 95 percent confidence level.

TRAVELSCOPE SURVEY CARD

Please complete for each **pleasure/personal or business trip** taken in the month of **OCTOBER**— where you and/or other members of your household (HH) traveled **50 miles or more, one-way, away from home (including day trips) OR spent one or more overnights**. **DO NOT** include trips commuting to/from work or school or trips taken as a flight attendant or commercial vehicle operator.

TOTAL # OF TRIPS IN OCTOBER: _____ If you **DID NOT TRAVEL** for pleasure/personal or business, X here , and return card.
(If more than 3 trips were taken, please record the information for your **3 most recent trips**. Record Trips #2 and #3 on Side 2.)

ANSWER THIS SIDE FIRST

OCTOBER	Purpose (See Codes)	Transportation (See Codes)	Number Of HH Members Traveling	List States/Countries Visited (X box if passed through only)	Key Cities & Places Visited In That State/Country	# Nights In Each State/Country In: (X box if no nights)	Hotel/Motel/B&B	Private Home	Condo/Time Share	RV/Tent	Other	Total \$ Spent Per State/Country	Activities In State/Country (See Codes)
Trip #1			No. By Age	<input type="checkbox"/> 1. _____		<input type="checkbox"/>	#	#	#	#	#	\$	
Primary			0-17	<input type="checkbox"/> 2. _____		<input type="checkbox"/>	#	#	#	#	#	\$	
Secondary			18+	<input type="checkbox"/> 3. _____		<input type="checkbox"/>	#	#	#	#	#	\$	

PURPOSE CODES

1= Visit friends/relatives
2= Outdoor recreation
3= Entertainment/Sightseeing
4= Other pleasure/personal
5= Business-General (e.g., Consulting, Service)
6= Business-Convention/Conference/Seminar
7= Combined Business/pleasure

TRANSPORTATION CODES

1= Own Auto/Truck
2= Rental car
3= Camper/RV
4= Ship/Boat
5= Airplane
6= Bus
7= Motor-coach
8= Train
9= Other

ACTIVITY CODES

01= Historic places, sites, museums
02= Performing Arts (e.g., Concerts, Plays, Stage shows)
03= Cultural Events/Festivals
04= Art museums/Galleries
05= Outdoor (e.g., hunt, fish, hike, bike, camp)
06= Shopping
07= Nightlife/Dancing
08= Beach activities
09= National/State park
10= Attend sports event
11= Gambling
12= Water sports/Boating
13= Golf
14= Theme/Amusement park
15= Zoo/Aquarium/Science Museum
16= Winter sports (e.g., skiing)
17= Rural sightseeing
18= City/Urban sightseeing
19= Seminar/Courses
20= Attend a social/family event (e.g., wedding, funeral, graduation)

CONTINUE ⇨

ANSWER OTHER SIDE FIRST

OCTOBER	Purpose (See Codes)	Transportation (See Codes)	Number Of HH Members Traveling	List States/Countries Visited (X box if passed through only)	Key Cities & Places Visited In That State/Country	# Nights In Each State/Country In: (X box if no nights)	Hotel/Motel/B&B	Private Home	Condo/Time Share	RV/Tent	Other	Total \$ Spent Per State/Country	Activities In State/Country (See Codes)
Trip #2			No. By Age	<input type="checkbox"/> 1. _____		<input type="checkbox"/>	#	#	#	#	#	\$	
Primary			0-17	<input type="checkbox"/> 2. _____		<input type="checkbox"/>	#	#	#	#	#	\$	
Secondary			18+	<input type="checkbox"/> 3. _____		<input type="checkbox"/>	#	#	#	#	#	\$	
Trip #3			No. By Age	<input type="checkbox"/> 1. _____		<input type="checkbox"/>	#	#	#	#	#	\$	
Primary			0-17	<input type="checkbox"/> 2. _____		<input type="checkbox"/>	#	#	#	#	#	\$	
Secondary			18+	<input type="checkbox"/> 3. _____		<input type="checkbox"/>	#	#	#	#	#	\$	

PURPOSE CODES

1= Visit friends/relatives
2= Outdoor recreation
3= Entertainment/Sightseeing
4= Other pleasure/personal
5= Business-General (e.g., Consulting, Service)
6= Business-Convention/Conference/Seminar
7= Combined Business/pleasure

TRANSPORTATION CODES

1= Own Auto/Truck
2= Rental car
3= Camper/RV
4= Ship/Boat
5= Airplane
6= Bus
7= Motor-coach
8= Train
9= Other

ACTIVITY CODES

01= Historic places, sites, museums
02= Performing Arts (e.g., Concerts, Plays, Stage shows)
03= Cultural Events/Festivals
04= Art museums/Galleries
05= Outdoor (e.g., hunt, fish, hike, bike, camp)
06= Shopping
07= Nightlife/Dancing
08= Beach activities
09= National/State park
10= Attend sports event
11= Gambling
12= Water sports/Boating
13= Golf
14= Theme/Amusement park
15= Zoo/Aquarium/Science Museum
16= Winter sports (e.g., skiing)
17= Rural sightseeing
18= City/Urban sightseeing
19= Seminar/Courses
20= Attend a social/family event (e.g., wedding, funeral, graduation)

Not shown actual size.

GLOSSARY OF TERMS

Activities	<p>TravelScope gathers information on 20 different activity categories:</p> <ol style="list-style-type: none"> (1) visiting historic places, sites, museums (2) attending performing arts events (e.g., concerts, plays, stage shows) (3) attending cultural events or festivals (4) visiting art museums or galleries (5) outdoor activities (e.g., hunt, fish, hike, bike, camp) (6) shopping (7) engaging in nightlife activities or dancing (8) beach activities (9) visiting national or state parks (10) attending sports events (11) gambling (12) water sports or boating (13) playing golf (14) going to theme or amusement parks (15) visiting zoos, aquariums, or science museums (16) winter sports (e.g., skiing) (17) rural sightseeing (18) city/urban sightseeing (19) taking seminars or courses (20) attending a social or family event (e.g., wedding, funeral, graduation)
Annual Household Income	The total combined annual income of the household before taxes.
Business Trip	Any trip where the primary purpose of the trip was given as “business-general (e.g., consulting, service),” “convention/conference/seminar,” or “combined business and pleasure.”
Census Region/Division of Origin/Destination	Regional/Divisional breakdowns as defined by the U.S. Bureau of Census:
Northeast	<p>New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island and Vermont.</p> <p>Mid-Atlantic: New Jersey, New York and Pennsylvania</p>
South	<p>South Atlantic: Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia and West Virginia.</p> <p>East South Central: Alabama, Kentucky, Mississippi and Tennessee.</p> <p>West South Central: Arkansas, Louisiana, Oklahoma and Texas.</p>

**Census Region/Division
of Origin/Destination (continued)**

Midwest East North Central: Illinois, Indiana, Michigan, Ohio and Wisconsin

West North Central: Iowa, Kansas, Minnesota, Missouri, 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 Area (DMA) Designated Marketing Areas (DMAs) are areas of television coverage defined by counties that are based on surveys conducted by Nielsen Media Research. A DMA was 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.

Leisure Trip Any trip where the primary purpose of the trip is given as “visit friends or relatives, outdoor recreation, entertainment/sightseeing, or other pleasure/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 children), 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

Lifestages (continued)

<i>Working</i>	Multi member Household
<i>Older Couple:</i>	Age of Head 45 and over Head of Household Employed Married or Non-related Individual(s) of Opposite Sex 18+ Present No Children Present
<i>Retired</i>	Multi member Household
<i>Older Couple:</i>	Age of Head 45 and Over Head of Household Not Employed No Children Present Married or Non-related Individual(s) of Opposite Sex 18+ Present
<i>Young Parent:</i>	Multi member Household Age of Head Under 45 Youngest Child Under 6
<i>Middle Parent:</i>	Multi member Household Age of Head Under 45 Youngest Child 6+
<i>Older Parent:</i>	Multi member Household Age of Head 45+ Child at Home-- Any Age
<i>Roommates:</i>	Unmarried Head of Household Living with a Non-relative 18+ of Same Sex

Lodging Information was 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 Transportation Each trip was classified according to the respondent's answer to the question, "Primary and secondary transportation (mode)."

Nights Away from home The number of nights spent away from home on one trip, including nights spent at the destination and en route. It was possible for a trip not to involve an overnight stay if the traveler took a trip of 50 miles or more, one-way, and returned home the same day.

Number of Household 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 was 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.)

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.

Landed Gentry: Large, multi-income families with school-aged kids, headed by well-educated executives, professionals and "techies." The fourth most affluent group.

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.

Urban Cores: Predominantly singles, solo parents with young children, and the unemployed that are living in dense, rented rowhouses and high-rise apartments. These households are reflect the least affluent social group.

2nd City Blues: Second-tier city dwellers living in downtown neighborhoods.

2nd City Centers: Predominantly white residents of mid-scale, middle-density, satellite cities surrounding major metropolitan areas. These households have a lower cost of living.

2nd City Society: Highly educated, high income households in America's "second" and "satellite" cities.

Clusters

Blue Blood Estates: Established executives, professionals, and “old money” heirs that live in the wealthiest suburbs and live luxuriously.

Bohemian Mix: Highly educated singles, tending to be executives, students, artists, and writers who are living in rented high-rises.

Boomers & Babies: Young, white-collar suburban families. Most are executives and “techies” and live in the Western United States. Predominately white, but with significant Asian and Hispanic representation.

Boomtown Singles: Young professionals and “techies” living in multi-unit rentals in fast-growing smaller cities in the South, Midwest, and West.

Country Squires: Affluent well-educated professionals and white collar managers living in the outer suburbs to seek tranquility in the country.

God’s Country: Executive families living away from cities.

PRIZM Clusters (continued)

<i>Greenbelt Families:</i>	Young, middle-class town families.
<i>Kids & Cul-de-sacs:</i>	Upscale, white-collar professional suburban families.
<i>Hispanic Mix:</i>	Large families with lots of small children that are concentrated in bilingual neighborhoods in Chicago, Miami, Texas, Los Angeles, the Southwest, and the Atlantic metro corridor.
<i>Mid-City Mix</i>	Young, predominately black, but also Hispanic, households working mostly in service and white-collar industries. They live in urban neighborhoods mostly in the Northeast and around the Great Lakes
<i>Middle America:</i>	Midscale families in mid-size towns.
<i>Middleburg Managers:</i>	Solid citizens of smaller cities with above-average incomes. Half of this group are older and married with grown children and the other half are young and single with no children.
<i>New Beginnings:</i>	Young, well-educated minorities who are living in multi-unit rentals and working in low-level, white-collar jobs in the boomtowns of the Southeast, Southwest and the Pacific coast.
<i>Norma Rae-Ville:</i>	Young families in bi-racial mill towns, centered in the South, the Mississippi delta, and the Gulf coast and Atlantic states.
<i>Scrub Pine Flats:</i>	Older African-American farm families located mainly in the coastal flatlands of the Atlantic and Gulf states.
<i>Second City Elite:</i>	Upscale, professional executive families in second-tier cities or satellite cities of major metropolitan areas.
<i>Single City Blues:</i>	Many singles and students in Eastern mega-cities and in the West.
<i>Smalltown Downtown:</i>	Mostly young people living near city colleges and working in low-level white-collar sales and technical jobs.
<i>Southside City</i>	Young, predominately black households in the Mississippi delta cities, the Gulf Coast and Atlantic States. Mostly low-income, blue collar, service workers.
<i>Towns and Gowns:</i>	Mostly young people on limited budgets and highly-educated, underpaid, professionals.
<i>Upward Bound:</i>	Young upscale white-collar families.
<i>Winner's Circle:</i>	"New money" families living in major metropolitan suburbs. Well educated professionals.

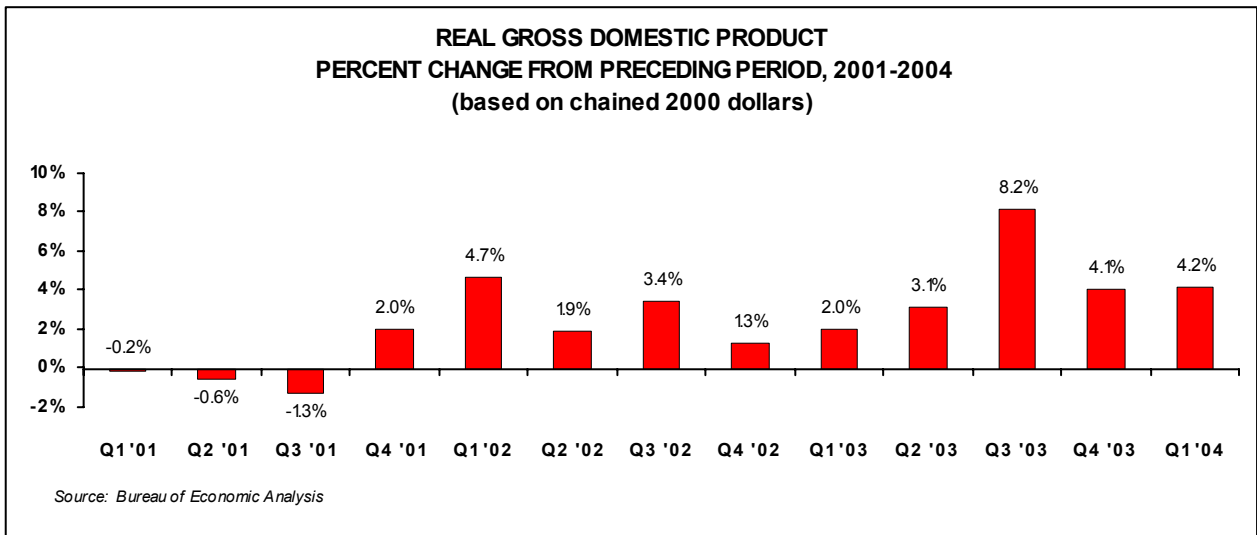
Purpose of Trip Each trip is classified according to the respondent's answer to the questions "primary and secondary purpose" with these categories: (1) visit friends or relatives, (2) outdoor recreation, (3) entertainment/ sightseeing, (4) other pleasure/personal, (5) business-general (e.g., consulting, service), (6) business-convention/conference/seminar, or (7) combined business and pleasure.

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.

ECONOMIC/TRAVEL INDICATORS

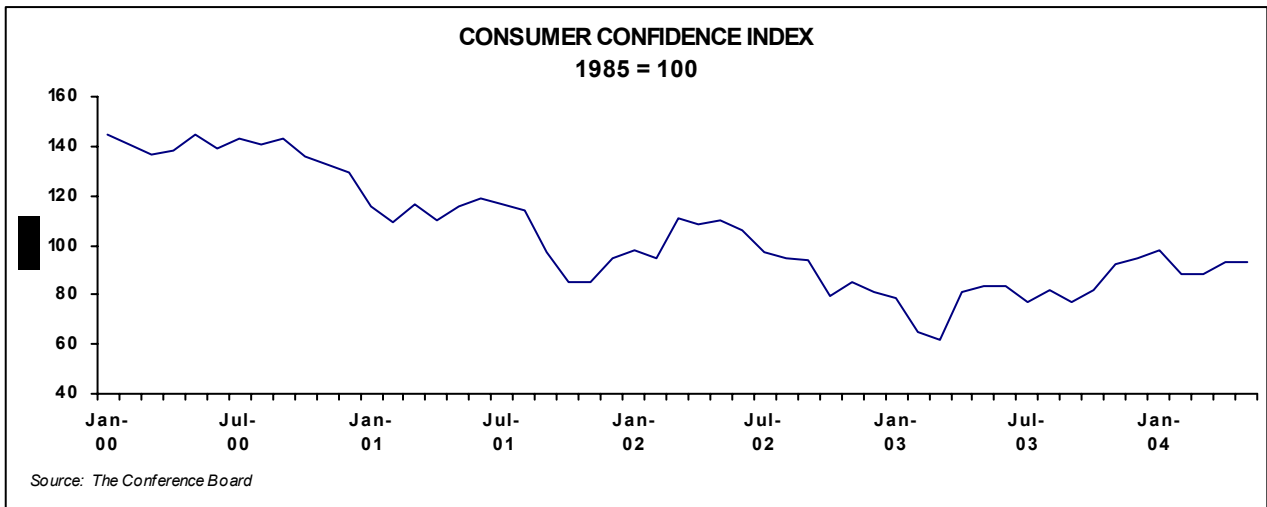
The Economy

There were definitely optimistic signs in the economy in 2003 as first quarter 2003 real Gross Domestic Product (GDP) growth reached 2.0 percent and climbed to 3.1 percent in the second quarter. Moreover, in the third quarter real GDP growth soared at a spectacular 8.2 percent pace. However, the rate of growth subsequently slowed in the fourth quarter to 4.1 percent. For the entire year, real GDP increased 3.1 percent.



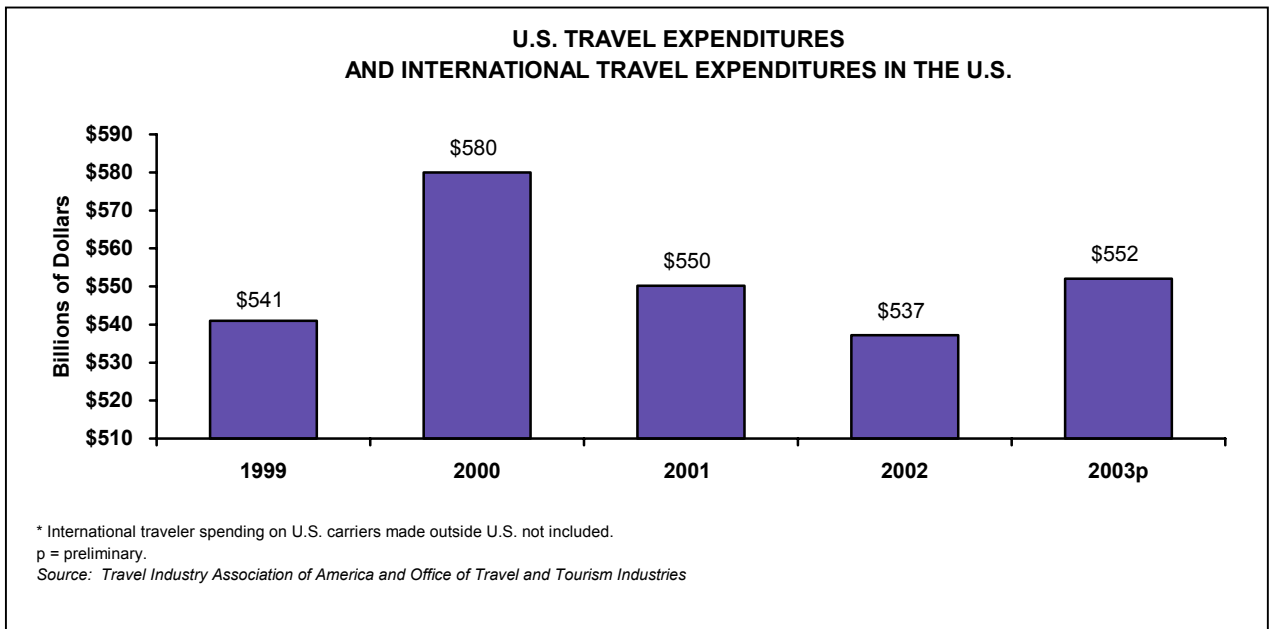
Consumer Confidence

The Conference Board's consumer confidence index fell early in 2003 when concerns about war in Iraq eroded confidence. The confidence index subsequently climbed and ended the year at 94.8 in December.



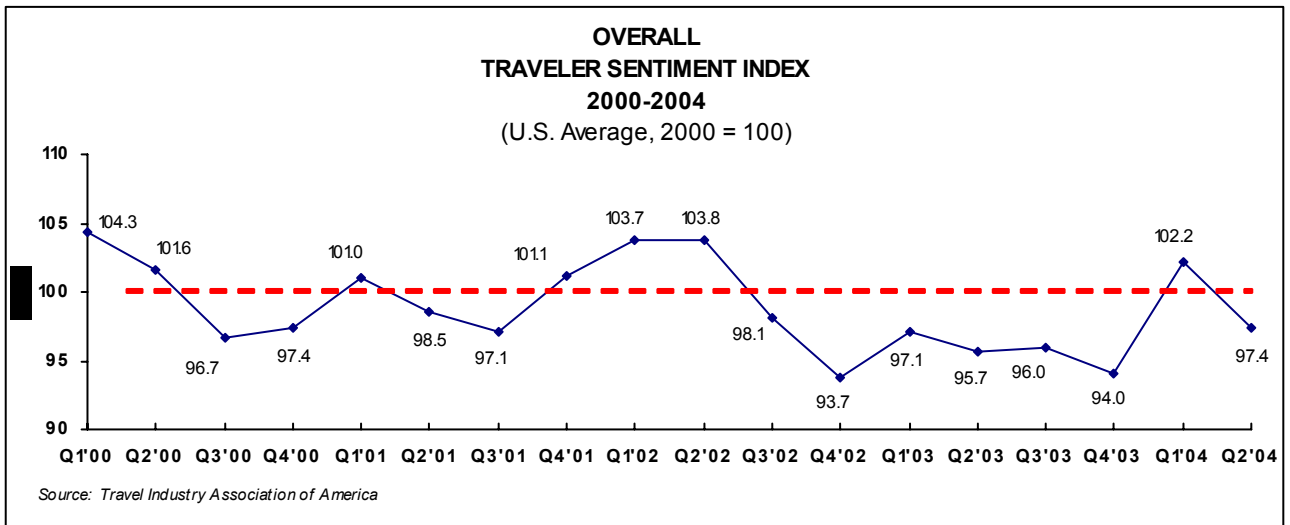
Travel Expenditures

Total domestic and international expenditures increased 2.8 percent in 2003.



Traveler Sentiment Index

Traveler sentiment began strong in 2003, then remained stable in the second and third quarters. By the fourth quarter, traveler sentiment declined.



MATURE TRAVEL

This section focuses on Mature Louisiana visitors, i.e., visitors in households headed by someone age 55 or older. Mature households generated 28 percent (or 6.9 million) of all Louisiana person-trips in 2003. Baby Boomer (age 35-54) households generated 44 percent (11.2 million) of the person-trips, and Generation X/Y (age 18-34) households accounted for another 28 percent (7.0 million).

Not surprisingly, a majority (52%) of Mature Louisiana trips are taken by households headed by someone retired, compared to 16 percent of overall Louisiana household trips. The average age of the head of household is 66 versus 46 for overall Louisiana visiting households. Income is slightly higher for Mature traveling households compared to the average Louisiana visiting household (\$67,500 vs. \$66,100).

Trip characteristics of Mature Louisiana visitors are generally similar to those of overall Louisiana visitors, yet there are some differences. For example, Mature Louisiana visitors are more likely than overall Louisiana visitors to lodge in a hotel, motel, or B&B on overnight person-trips (69% vs. 63%) and less like to stay in a private home (23% vs. 30%). Mature Louisiana visitors are also more likely to gamble (28% vs. 19%), yet less likely to go shopping (17% vs. 22%), attend a social/family event (13% vs. 19%) and engage in nightlife/dancing (5% vs. 12%). Average household trip spending tends to be just slightly lower among Mature Louisiana visitors compared to overall Louisiana visitors (\$391 vs. \$433), not including transportation to the destination.

Summary Table of Trip Characteristics by Total Louisiana Visitors and Mature Louisiana Visitors (Households Headed by Someone Age 55 and Older), 2003

	Total Louisiana Visitors	Mature Louisiana Visitors (Household Head Age 55+)
TRIP CHARACTERISTICS - in person-trips		
<u>Primary Purpose of Trip</u>		
Leisure	79%	81%
Business	21	19
<u>Primary Mode of Transportation</u>		
Auto (car/truck/RV/rental car)	76%	78%
Air	19	13
<u>Trip Duration</u>		
Percent Overnight	65%	63%
Average Trip Duration (including day-trips)	2.0 nights	1.9 nights
Average OVERNIGHT Trip Duration	3.2 nights	3.1 nights
<u>Lodging Use</u>		
(% overnight person-trips)		
Hotel/Motel/B&B	63%	69%
Private Home	30	23
<u>Top Activities</u>		
Gambling	19%	28%
Shopping	22	17
Attend a Social/Family Event	19	13
Nightlife/Dancing	12	5
TRIP CHARACTERISTICS - in household trips		
<u>Trip Spending</u>		
Average Trip Spending Per Household	\$433	\$391
DEMOGRAPHICS - in household trips		
<u>Education</u>		
High School Education or Less	20%	25%
Some College – No Degree	24	27
Completed College	37	30
Post Graduate Work	19	18
<u>Employment</u>		
Full-time	71%	36%
Part-time	7	10
Retired	16	52
Unemployed	6	2
<u>Household Income</u>		
Average Annual Income	\$66,100	\$67,500
<u>Age of Household Head</u>		
Average Age	46 years	66 years
<u>Children in Household</u>		
Percent with Children	33%	7%

Demographics are for the head of household.

BUSINESS DEVELOPMENT INDEX

The Business Development Index is calculated for each city to measure the propensity of U.S. households to take trips (measured by household trips) compared to the share of total households. For example, Beaumont-Port Arthur, TX households make up 0.16 percent of U.S. households, yet they take 2.31 percent of domestic household trips to Louisiana, creating a business development index of 1442. The baseline of 100 represents equality in the proportion of U.S. households in a city and the percentage of trips that city's households take to Louisiana. The above figures are based on data from 2000-2003.

2000-2003 DMA Business Development Index for Louisiana					
City (DMA) of Origin	Population	Percent Population	Total Average Visitors	2000-2003 Percent Visitors	INDEX
Beaumont-Port Arthur, TX	463,054	0.16%	479,283	2.31%	1442
Biloxi-Gulfport, MS	360,391	0.13%	329,721	1.71%	1369
Tyler-Longview (Lufkin & Nacogdoches), TX	695,121	0.24%	665,179	2.27%	944
Victoria, TX	86,546	0.03%	23,725	0.26%	866
Jackson, MS	887,539	0.31%	598,992	2.51%	817
Hattiesburg-Laurel, MS	276,038	0.10%	184,027	0.71%	741
Houston, TX	5,309,366	1.87%	2,758,843	11.78%	640
Abilene-Sweetwater, TX	310,770	0.11%	82,612	0.59%	552
Panama City, FL	338,282	0.12%	60,094	0.54%	462
Dallas-Ft. Worth, TX	6,187,889	2.18%	2,178,509	9.68%	452
Mobile-Pensacola (Ft. Walton Beach), AL-FL	1,298,000	0.46%	538,244	1.96%	436
Waco-Temple-Bryan, TX	873,092	0.31%	322,051	1.30%	430
Austin, TX	1,528,510	0.54%	412,078	2.16%	409
Little Rock-Pine Bluff, AR	1,343,360	0.47%	361,941	1.83%	393
Columbus-Tupelo-West Point, MS	492,869	0.17%	107,780	0.55%	321
Meridian, MS	186,928	0.07%	49,821	0.21%	318
Greenwood-Greenville, MS	233,423	0.08%	54,549	0.22%	274
San Antonio, TX	2,110,113	0.74%	481,841	1.85%	253
Jackson, TN	204,573	0.07%	20,508	0.17%	234
Dothan, AL	247,357	0.09%	19,321	0.20%	228
Birmingham (Anniston, Tuscaloosa), AL	1,763,882	0.62%	241,725	1.35%	221
Corpus Christi, TX	564,305	0.20%	97,092	0.40%	204
Macon, GA	611,956	0.22%	54,172	0.42%	197
Memphis, TN	1,775,153	0.62%	212,638	1.19%	194
Sherman-Ada, TX-OK	314,092	0.11%	64,085	0.20%	186
Montgomery (Selma), AL	634,490	0.22%	88,044	0.38%	173
Ft. Smith-Fayetteville-Springdale-Rodgers, AR	685,011	0.24%	63,253	0.37%	154
Huntsville-Decatur (Florence), AL	911,963	0.32%	102,061	0.43%	136
Augusta, GA	654,048	0.23%	24,839	0.23%	103
Rockford, IL	466,420	0.16%	10,755	0.16%	100

2000-2003 DMA Business Development Index for Louisiana					
City (DMA) of Origin	Population	Percent Population	Total Average Visitors	2000-2003 Percent Visitors	INDEX
Oklahoma City, OK	1,658,435	0.58%	154,508	0.55%	96
Atlanta, GA	5,513,192	1.94%	423,825	1.79%	94
Columbus, GA	547,408	0.19%	56,404	0.16%	86
Gainesville, FL	297,834	0.10%	33,071	0.08%	81
Amarillo, TX	517,865	0.18%	23,568	0.14%	80
Lima, OH	155,062	0.05%	8,708	0.04%	78
Orlando-Daytona Beach-Melbourne, FL	3,166,876	1.11%	188,079	0.85%	77
Nashville, TN	2,311,251	0.81%	157,062	0.61%	77
Odessa-Midland, TX	368,830	0.13%	21,400	0.10%	76
Binghamton, NY	349,915	0.12%	2,546	0.09%	74
Peoria-Bloomington, IL	625,093	0.22%	14,854	0.15%	71
Tallahassee-Thomasville, FL-GA	670,122	0.24%	43,441	0.16%	70
Bend, OR	129,196	0.05%	6,034	0.03%	64
Cincinnati, OH	2,234,322	0.79%	62,346	0.48%	63
West Palm Beach-Ft. Pierce, FL	1,698,804	0.60%	69,681	0.36%	61
Lincoln & Hastings-Kearny, NE	688,125	0.24%	5,768	0.14%	60
Columbia-Jefferson City, MO	436,657	0.15%	19,978	0.09%	60
Cedar Rapids-Waterloo-Iowa City & Dubuque, IA	837,986	0.29%	33,544	0.17%	59
Bowling Green, KY	212,464	0.07%	13,043	0.04%	59
Sioux Falls (Mitchell), SD	635,337	0.22%	14,726	0.12%	55

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 under representation.

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, that are not pass thru trips, then b) allocating those unidentified trips to cities proportionally based on the known visitor volumes.

2003 Non-resident Visitor Volume Estimates for Louisiana Cities

City	Volume		Estimated Additional Volume **	Adjusted City Volume
	Percent*	Count		
New Orleans	46.5%	7,321,000	1,116,000	8,437,000
Shreveport-Bossier City	13.3%	2,094,000	319,000	2,413,000
Baton Rouge	8.1%	1,267,000	193,000	1,460,000
Lake Charles	7.3%	1,149,000	175,000	1,324,000
Lafayette	5.6%	874,000	133,000	1,007,000
Monroe	2.0%	322,000	49,000	371,000
Alexandria	1.4%	218,000	33,000	251,000

* Percent of the 15,732,000 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 (2,398,000) and were not pass thru.

2003 Resident Visitor Volume Estimates for Louisiana Cities

City	Volume		Estimated Additional Volume **	Adjusted City Volume
	Percent*	Count		
New Orleans	15.6%	819,000	45,000	864,000
Shreveport-Bossier City	9.0%	475,000	26,000	501,000
Baton Rouge	13.3%	697,000	38,000	735,000
Lake Charles	5.3%	276,000	15,000	291,000
Lafayette	8.5%	444,000	25,000	469,000
Monroe	6.0%	314,000	17,000	331,000
Alexandria	5.3%	280,000	15,000	295,000

* Percent of the 5,252,000 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 (290,000) and were not pass thru.

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

PRIZM CLUSTER DEVELOPMENT INDEX

The PRIZM Cluster Development Index is calculated for each PRIZM cluster to measure the propensity of U.S. traveling households in each cluster to take trips to Louisiana. This is calculated by dividing the share of non-resident trips to Louisiana taken by each cluster by the share of all U.S. trips taken by each cluster and multiplying by 100. For example, Country Squires households take 1.3 percent of all U.S. household trips, yet they take 3.5 percent of non-resident household trips to Louisiana, creating a brand development index of 258. The baseline index of 100 represents equality in the proportion of U.S. household trips for a cluster with the proportion of non-resident Louisiana trips for a cluster.

2003 PRIZM Cluster Development Index for Non-resident Louisiana Visitors					
PRIZM Cluster	U.S. Domestic Household trips (000)	Percent of U.S. Domestic Household trips*	Total Non-resident LA Trips (000)	Percent of Non-resident LA Trips*	INDEX
Country Squires	8,648	1.3%	401	3.5%	258
Scrub Pine Flats	8,022	1.2%	368	3.2%	255
Single City Blues	6,756	1.0%	308	2.7%	253
Southside City	6,036	0.9%	239	2.1%	220
Boomtown Singles	4,833	0.8%	185	1.6%	212
Bohemian Mix	8,226	1.3%	297	2.6%	201
Norma Rae-ville	6,502	1.0%	209	1.8%	179
Kids & Cul-de-Sacs	26,506	4.1%	796	6.9%	167
New Beginnings	6,216	1.0%	178	1.5%	159
Hispanic Mix	2,910	0.5%	70	0.6%	133
Boomers & Babies	7,388	1.1%	175	1.5%	132
Military Quarters	3,286	0.5%	78	0.7%	131
Blue Highways	12,110	1.9%	278	2.4%	127
Greenbelt Families	13,617	2.1%	310	2.7%	126
Starter Families	9,170	1.4%	206	1.8%	125
Young Influentials	8,767	1.4%	193	1.7%	122
Old Yankee Rows	4,828	0.8%	105	0.9%	120
Family Scramble	8,123	1.3%	171	1.5%	117
Middleburg Managers	14,856	2.3%	311	2.7%	116
Blue Blood Estates	9,192	1.4%	192	1.7%	116
Winner's Circle	21,470	3.3%	448	3.9%	116
Rural Industrial	9,853	1.5%	201	1.7%	113
Second City Elite	17,045	2.6%	341	2.9%	111
New Eco-topia	8,057	1.3%	161	1.4%	111
Middle America	17,084	2.7%	340	2.9%	111
God's Country	26,851	4.2%	514	4.4%	106
Suburban Sprawl	8,493	1.3%	157	1.4%	103
Pools & Patios	13,324	2.1%	246	2.1%	103
Gray Power	13,425	2.1%	234	2.0%	97

2003 PRIZM Cluster Development Index for Non-resident Louisiana Visitors					
PRIZM Cluster	U.S. Domestic Household trips (000)	Percent of U.S. Domestic Household trips*	Total Non-resident LA Trips (000)	Percent of Non-resident LA Trips*	INDEX
Hard Scrabble	8,851	1.4%	151	1.3%	95
Upward Bound	16,961	2.6%	286	2.5%	94
Country Squires	13,569	2.1%	228	2.0%	93
River City, USA	12,255	1.9%	205	1.8%	93
Latino America	4,298	0.7%	70	0.6%	91
Money & Brains	7,113	1.1%	100	0.9%	78
Executive Suites	11,768	1.8%	165	1.4%	78
Shotguns & Pickups	10,423	1.6%	144	1.2%	76
Smalltown Downtown	7,530	1.2%	102	0.9%	75
Golden Ponds	11,898	1.8%	159	1.4%	74
Grain Belt	13,200	2.1%	171	1.5%	72
New Homesteaders	13,174	2.0%	157	1.4%	66
Mines & Mills	11,520	1.8%	137	1.2%	66
Urban Achievers	9,135	1.4%	107	0.9%	65
Rustic Elders	16,698	2.6%	194	1.7%	65
Blue-Chip Blues	11,708	1.8%	135	1.2%	64
Back Country Folks	10,544	1.6%	120	1.0%	63
Mobility Blues	7,681	1.2%	88	0.8%	63
Big Fish, Small Pond	13,290	2.1%	149	1.3%	62
New Empty Nests	17,350	2.7%	180	1.5%	57
Mid-City Mix	4,061	0.6%	41	0.4%	56
Inner Cities	3,590	0.6%	36	0.3%	56
Big City Blend	5,453	0.8%	54	0.5%	55
Red, White & Blues	12,151	1.9%	117	1.0%	54
Sunset City Blues	10,750	1.7%	98	0.8%	51
Gray Collars	9,854	1.5%	85	0.7%	48
Big Sky Families	12,554	2.0%	108	0.9%	48
Agri-Business	10,176	1.6%	80	0.7%	43
Young Literati	6,914	1.1%	49	0.4%	39
Urban Gold Coast	3,191	0.5%	22	0.2%	37
American Dreams	9,511	1.5%	60	0.5%	35
Upstarts & Seniors	9,122	1.4%	56	0.5%	34
Hometown Retired	5,577	0.9%	27	0.2%	27

* Percentages are rounded to one decimal place.