

2002

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 2002. 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,
- 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 2002. Appendix E presents the Brand Development Index of the top 50 origin cities for Louisiana. Appendix F presents the PRIZM Cluster Development Index. Appendix G displays city volume estimates.

EXECUTIVE SUMMARY

Louisiana visitor volume increased by two percent in 2002 over 2001, to 21.2 million person-trips, compared to only a 0.3% increase in U.S. domestic travel volume overall. Gains were seen in pleasure travel volume while business travel volume slipped just slightly. African-American visitor volume to the state decreased by three percent. A concurrent decrease in the average length of stay resulted in a *decline* in visitor nights, down by two percent to an estimated 45.7 million nights.

- Louisiana hosted 21.2 million visitors in 2002, up by two percent over the prior year. Non-residents generated most Louisiana person-trips (73%). African-American travelers represented 13 percent of all travel in the state, or 2.6 million person-trips.
- Seventy-three percent of Louisiana visitors spent at least one night in the state. The average duration for overnight visitors was 2.9 nights. Thus, Louisiana experienced an estimated 45.7 million visitor nights in 2002, a decline of two percent from 2001.
- Texas, especially Houston and Dallas, were the top origin markets for Louisiana visitors. New Orleans was the top destination city, capturing 45 percent of all non-resident person-trips to the state.
- Data from 1999-2002 show that Biloxi-Gulfport and Beaumont-Port Arthur 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.)
- All six competitive states experienced a growth in travel volume. Florida increased more than Louisiana (+8%). Tennessee, Georgia, Alabama and Mississippi all experienced a two percent increase in travel volume (the same as Louisiana). Texas travel volume increased by just one percent over 2001.

Non-Resident visitors

- Seventy-three percent of Louisiana travelers in 2002 (15.6 million person-trips), were by non-resident travelers. Non-resident visitors generated a total of 35.6 million visitor nights in 2002. This represents a decline of 10 percent from the prior year.
- Two thirds (67%) of non-resident visitors to Louisiana in 2002 traveled to the state for pleasure purposes. Twenty-one percent of non-resident visitors traveled for business purposes.
- One in five (23%) non-resident visitors to the state traveled by air. Sixty-six percent traveled by auto, truck or RV.
- Most non-resident visitors (73%) stayed overnight, and those who did spent an average of 2.2 nights in the state. Just over a quarter (27%) visited just for the day.
- Of the 11.5 million non-resident overnight visitors to Louisiana, almost two-thirds (65%) included stays in hotels, motels or B&Bs. Twenty-nine percent used private home lodging while visiting the state.
- Gambling was the top activity (25%) for non-resident visitors, followed by shopping (24%) and visiting historical places/museums (18%).
- Non-resident visiting households spent, on average, \$478 per trip in 2002. The highest-spending households came from California (\$774). The lowest spenders were from Mississippi (\$238). 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 2002 were:

- More likely to travel for entertainment purposes (26% non-resident LA vs. 9% U.S.) and less likely to travel for outdoor recreation (2% vs. 10%).
- More likely to travel by air (23% non-resident LA vs. 16% U.S.).
- More likely to be on a day-trip (26% non-resident LA vs. 15% U.S.).
- More likely to stay in a hotel, motel or B&B (65% non-resident LA vs. 51% U.S.).
- More likely to participate in gambling (25% non-resident LA vs. 8% U.S.), and less likely to go shopping (24% vs. 34%), participate in outdoor activities (6% vs. 17%) or visit the beach (1% vs. 11%).
- More likely to be from households in the Retired Older Couple lifestage (14% non-resident LA vs. 9% U.S.).

Compared to Louisiana visitors overall, Louisiana business/convention travelers in 2002 were:

- More likely to travel by air (45% business/convention vs. 17% total).
- Staying longer (average length of stay 2.5 nights business/convention vs. 2.0 nights total).
- More likely to lodge in hotels, motels, or B&B's (92% business/convention vs. 58% total).
- Less likely to go shopping (13% business/convention vs. 24% total) or gamble (12% vs. 21%).
- Less likely to be Louisiana residents (21% business/convention vs. 27% total).
- Spending more per trip (\$476 business/convention vs. \$389 total).
- Younger (average age 46 business/convention vs. 48 total).
- Higher average annual household income (\$91.3K business/convention vs. \$65.0K total).

Compared to Louisiana visitors overall, Louisiana pleasure travelers in 2002 were:

- More likely to travel by car (84% pleasure vs. 77% total).
- Less likely to stay in hotels, motels or B&B's (47% pleasure vs. 58% total).
- Spending less (\$347 pleasure vs. \$389 total).
- More likely to have children under 18 on the trip (26% pleasure vs. 20% total).
- From households with lower average annual incomes (\$58.2K pleasure vs. \$65.0K total).

2002 U.S. ECONOMY AND TRAVEL INDUSTRY OVERVIEW

In the aftermath of the most difficult year in its history, the U.S. travel industry had hoped for a strong rebound in 2002. This failed to materialize and the industry as a whole found itself in the middle of a protracted struggle to maintain ground. Ongoing concerns about further terrorist attacks, coupled with slow economic growth, worked against prospects for near-term recovery.

Although the U.S. economy experienced a recession in 2001 with three consecutive quarters of decline in real GDP, there were some encouraging signs in early 2002. First quarter 2002 real GDP reached 5.0 percent, the largest quarterly increase since fourth quarter 1999. However, the rate of growth subsequently slowed and real GDP increased just 2.4 percent for the year. In 2002, 1.1 million nonfarm jobs disappeared, the largest annual decline since 1991. Reflecting the economy's overall weakness, the national unemployment rate hit 5.8 percent.

U.S. Travel Volume in 2002

Domestic person-trips by U.S. travelers remained relatively flat in 2002, at 1.021 billion person-trips (a 0.3% increase over 2001). Following the economic trends, first quarter travel volume was strong (+3% over 2001) but weakened beginning in the second quarter and remained stagnant for the remainder of the year.

Despite economic concerns and fears about terrorism, pleasure person-trips grew by 1.9 percent in 2002. As with overall travel, the strength in leisure travel was largely seen in the first quarter (+6% over 2001), before weakening and remaining subdued in the waning months of the year. The weak economy and concerns about war in Iraq contributed to a significant reduction in business person-trips in 2002. Business travel volume was down 5.5 percent for the year. In fact, 2002 marked the fourth consecutive annual decline in business person trips. Air travel continued a second year of decline, dropping eight percent in person-trip volume from the already depressed volumes seen in 2001.

Travel Expenditures in 2002

Both domestic and international travel expenditures declined for the second consecutive year in 2002. Domestic travel expenditures fell 2.0 percent and international travel spending declined 3.8 percent (the most current estimates by OTTI). Total domestic and international travel expenditures were off 2.2 percent in 2002. At the same time, visitor volume failed to offset lower spending levels.

The lingering impact of the 9/11 terrorist attacks on international travel to the U.S. was even more severe than on domestic travel. According to the Office of Travel and Tourism Industries, U.S. Department of Commerce, international arrivals to the United States in 2002 decreased seven percent from 2001. U.S. international travel receipts lost nearly \$3 billion in 2002 (excluding international passenger fares).

Travel costs, measured by TIA's Travel Price Index (TPI), fell 0.3 percent in 2002. This was the first annual decline in the last decade and was caused by ongoing declines in airfares and lodging prices from reduced demand. The Travel Price Index trend stands in marked contrast to overall inflation as measured by the Consumer Price Index (CPI-U), which rose 1.9 percent in 2002.

Travel Employment in 2001-02

The downward trend in travel-related employment that began in September 2001 continued into 2002. As a result, estimated average annual travel employment in the U.S. fell from 7.9 million in 2001 to 7.6 million in 2002, a four percent decline.

According to TIA's estimates (based on BLS employment data), more than 296,000 employees working directly for the travel industry lost their jobs in the last four months of 2001 alone. Among these, around 119,000 jobs were eliminated by the airlines and 55,000 were cut by the lodging industry.

The amusement and recreation services, foodservice, and retail sectors, which had not laid off significant numbers of workers in late 2001, were forced to downsize during 2002. Additional airline and lodging layoffs took place in response to further declines in travel spending and stagnation in the international visitor market. From September 2001 through December 2002, it was estimated that a total of 387,000 travel industry jobs disappeared.

2002 SUMMARY OF DOMESTIC TRAVEL IN THE U.S.

An estimated 1,021.3 million domestic person-trips were taken by U.S. residents in 2002

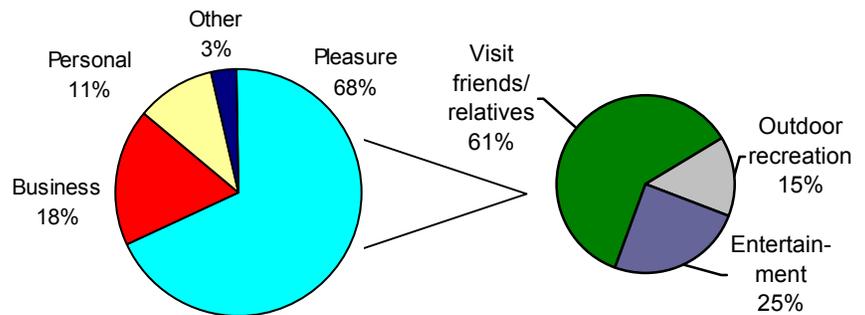
Overall U.S. travel volume in 2002 was relatively flat over 2001 (+0.3%). Travel volume was strong in the first quarter (+3% over 2001), but weakened beginning in the second quarter and remained stagnant for the remainder of the year.

The majority (68%) of person-trips in 2002 were for pleasure purposes. Within pleasure trips, visiting friends/relatives is the most common reason for traveling. Pleasure travel volume increased slightly over 2001 (up 2%).

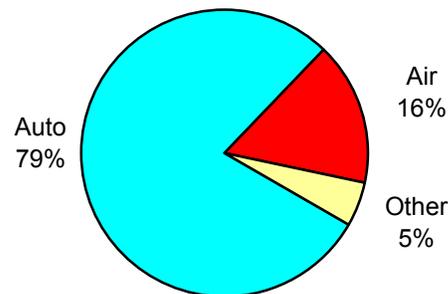
Travel for business purposes accounted for 18 percent of all U.S. person-trips. Business travel volume declined by 5.5 percent compared to 2001. In fact, business travel volume had declined for four consecutive years.

Most U.S. travel is by auto (79%). Auto travel increased by two percent in 2002. Person-trips by air declined by eight percent for the year.

2002 Primary Purpose of Trip



2002 Primary Mode of Transportation



Other Characteristics of the Average U.S. Trip:

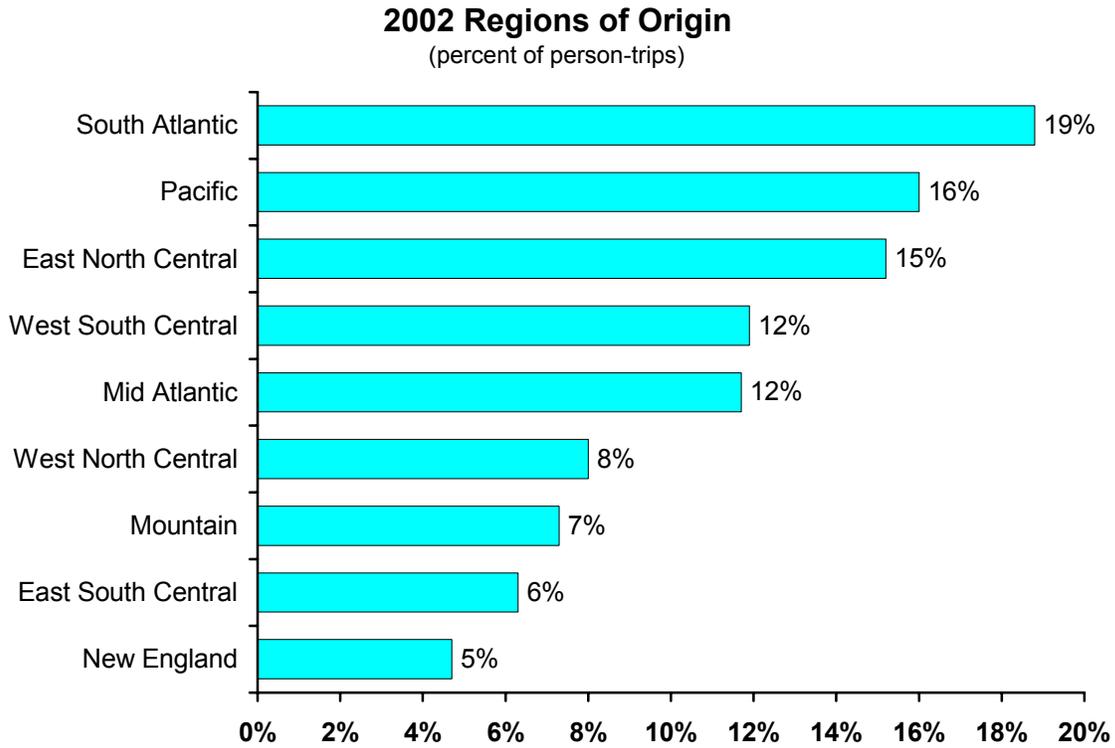
- The average household travel party size is 2.1 persons.
- 24 percent of trips include children under 18.
- The average trip duration is 3.3 nights. The average overnight trip duration is 4.1 nights.
- 51 percent of overnight U.S. trips include lodging in a hotel, motel or B&B.
- 40 percent of overnight U.S. trips include lodging in a private home.
- The average expenditure per trip is \$457.

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

- Shopping (34%)
- Outdoor (17%)
- Historical Places/Museums (14%)
- Beaches (11%)
- Cultural Events/Festivals (10%)
- National/State parks (10%)
- Additional activities include Theme/Amusement Park (9%), Gambling (8%), Nightlife/Dancing (8%) and Sports events (6%).

Census Region of Origin

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



2002

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

VISITOR VOLUME

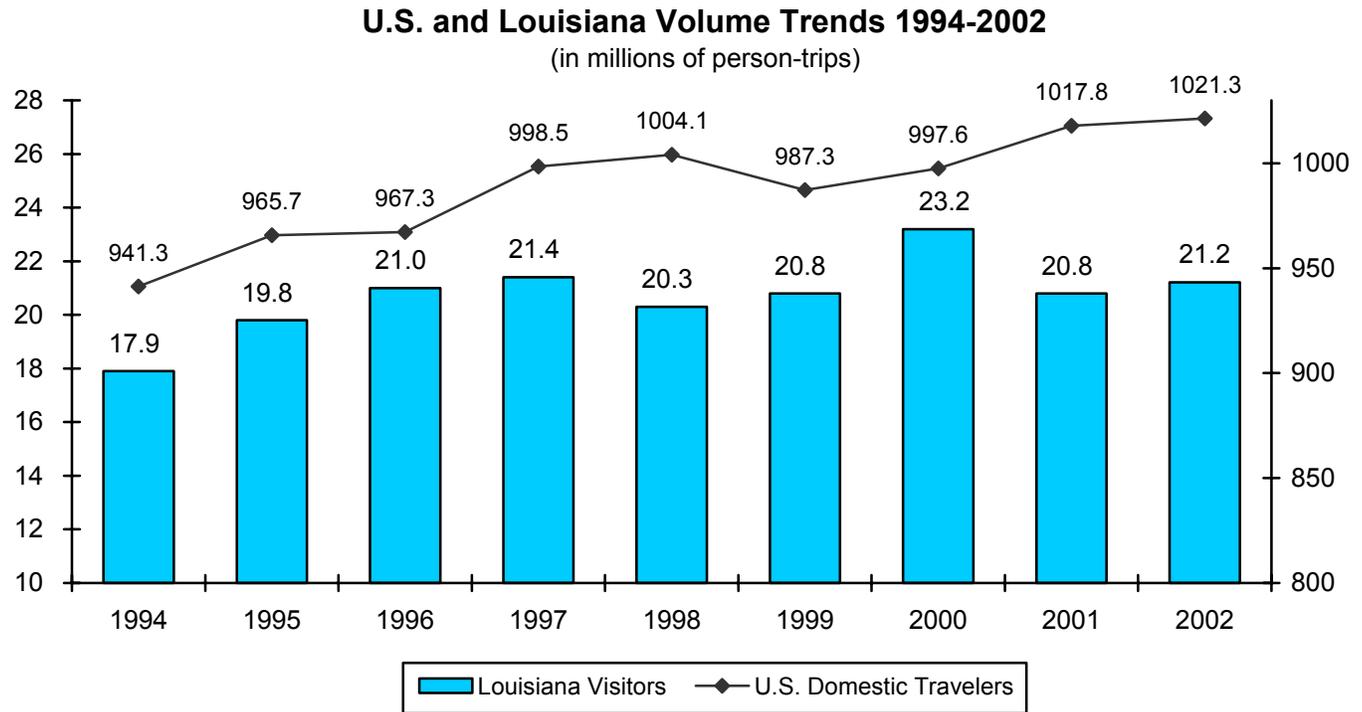
	<u>No. of Visitors</u> (in person-trips)	<u>Percent of Trip</u> <u>Spent in Louisiana</u>
Total U.S.	1,021,327,000	not applicable
Total Louisiana	21,215,000	57%
Non-resident visitors	15,559,000	54%
Non-resident African-American visitors	1,975,000	70%
Resident travelers	5,656,000	68%
Louisiana Cities*		
New Orleans		65%
Resident	1,084,000	
Non-resident	6,017,000	
Shreveport-Bossier City		74%
Resident	382,000	
Non-resident	1,918,000	
Baton Rouge		53%
Resident	755,000	
Non-resident	944,000	
Lafayette		70%
Resident	424,000	
Non-resident	662,000	
Lake Charles		66%
Resident	215,000	
Non-resident	1,113,000	
Monroe**		75%
Resident	251,000	
Non-resident	292,000	
Alexandria**		85%
Resident	214,000	
Non-resident	196,000	

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

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

Visitor Volume 1994-2002

Over 21 million travelers visited Louisiana in 2002, an increase of two percent over 2001. In comparison, U.S. domestic travel volume in 2002 was relatively flat over 2001 (+0.3%).



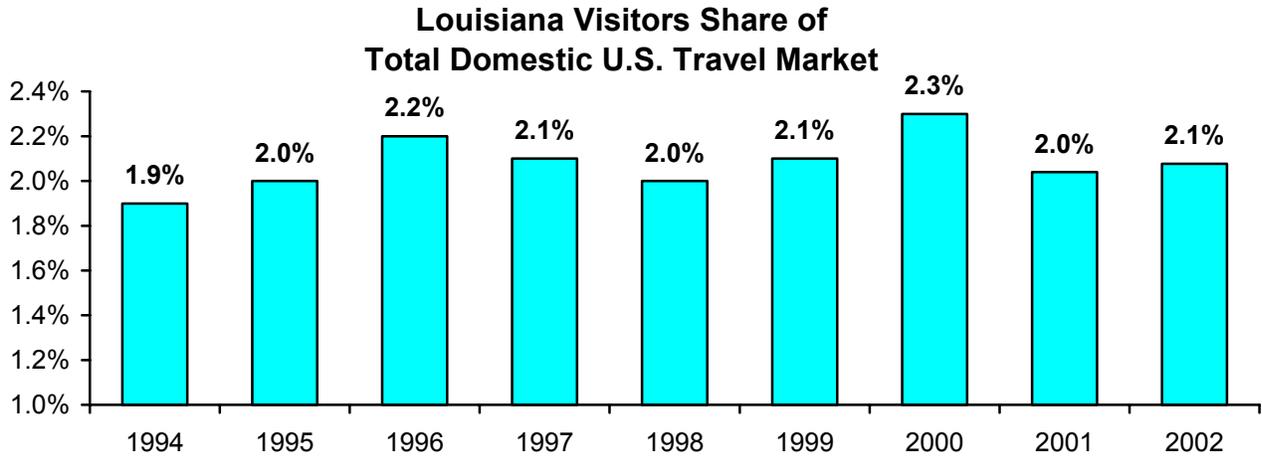
The year began strongly, with a 16 percent year-over-year increase in person-trips to Louisiana in the first quarter. The first quarter was also the strongest growth period nationally (+3%). Louisiana travel volume in the second and third quarters was on par with last year. There were significant declines in the fourth quarter in Louisiana (-7%) while at the same time travel was up slightly in the U.S. overall (+1%).

2002 Travel to Louisiana by Quarter (in millions of person-trips)				
	National		Louisiana	
	Travel Volume	Change from LY	Travel Volume	Change from LY
1st quarter	200.6	3%	5.1	16%
2nd quarter	261.9	-3%	5.7	*
3rd quarter	311.4	1%	5.6	1%
4th quarter	247.4	1%	4.9	-7%
TOTAL	1,021.3	*	21.2	2%

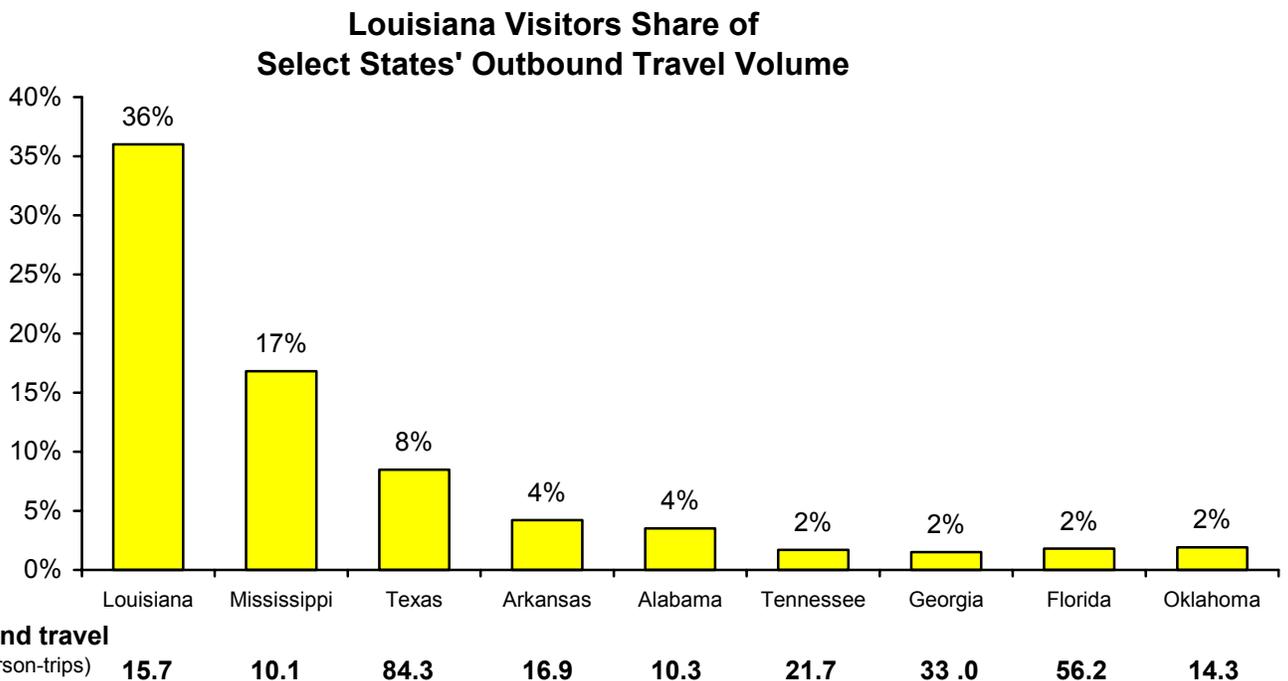
* Less than one percent.

Market Share

Louisiana had a 2.1 percent share of overall U.S. domestic travel volume in 2002. This was up slightly compared to 2001.



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 2002, 36 percent included at least one in-state destination on their trip. Almost one in five (17%) Mississippi travelers visited Louisiana when they traveled in 2002 and just eight percent of person-trips originating in Texas included Louisiana. Four percent of travelers each from Arkansas and Alabama visited Louisiana. Two percent of travelers each from Tennessee, Georgia, Florida, and Oklahoma visited Louisiana.

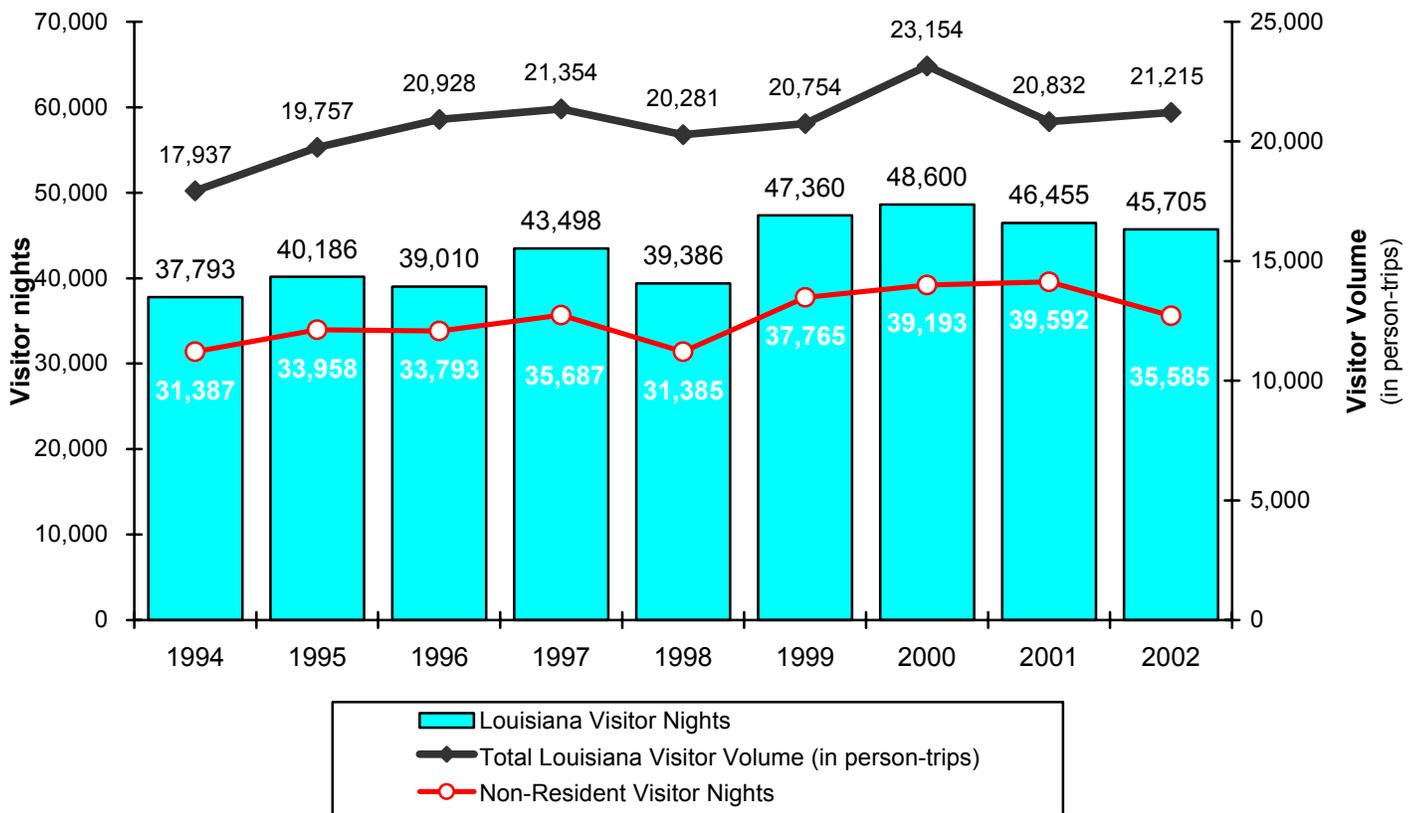


Visitor Nights

Of person-trips to Louisiana, 73 percent or 15.5 million, included at least one night in the state. The average stay for an overnight visitor was 2.9 nights. This translates into an estimated 45.7 million visitor nights, a two percent decline from 2001. This is due to a decline in average length of stay (2.9 nights in 2002 vs. 3.1 nights in 2001).

Non-resident travelers represent 78 percent of visitor nights in Louisiana. Overnight travel volume by non-residents declined by just over 800,000 person-trips compared to 2001. Thus, the volume of visitor nights by non-resident visitors declined by 10 percent, to 35.6 million.

Louisiana Visitor Volume and Visitor Nights Trends 1994-2002
(in thousands)

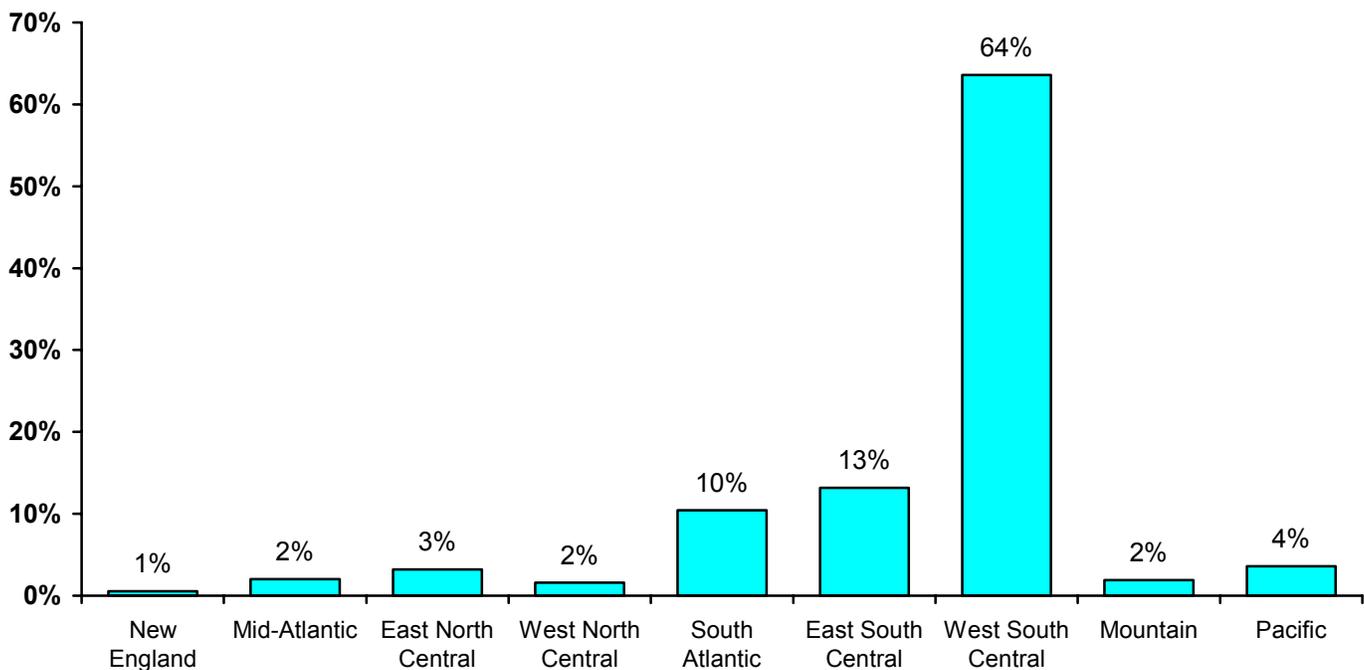


VISITOR ORIGINS

Region of Origin

Almost two-thirds of Louisiana person-trips (64%) originated in the West South Central region, which is comprised of Louisiana, Arkansas, Oklahoma and Texas. The East South Central and South Atlantic regions also contributed significant visitor volume, providing a total of 23 percent of Louisiana person-trips. The South Atlantic region includes Florida, Georgia, Virginia, North Carolina, Maryland, South Carolina, Delaware and West Virginia. The East South Central Region includes Mississippi, Alabama, Tennessee and Kentucky. No other census region accounted for greater than four percent of person-trips to the state.

2002 Louisiana Visitors Region of Origin
(percent of person-trips)



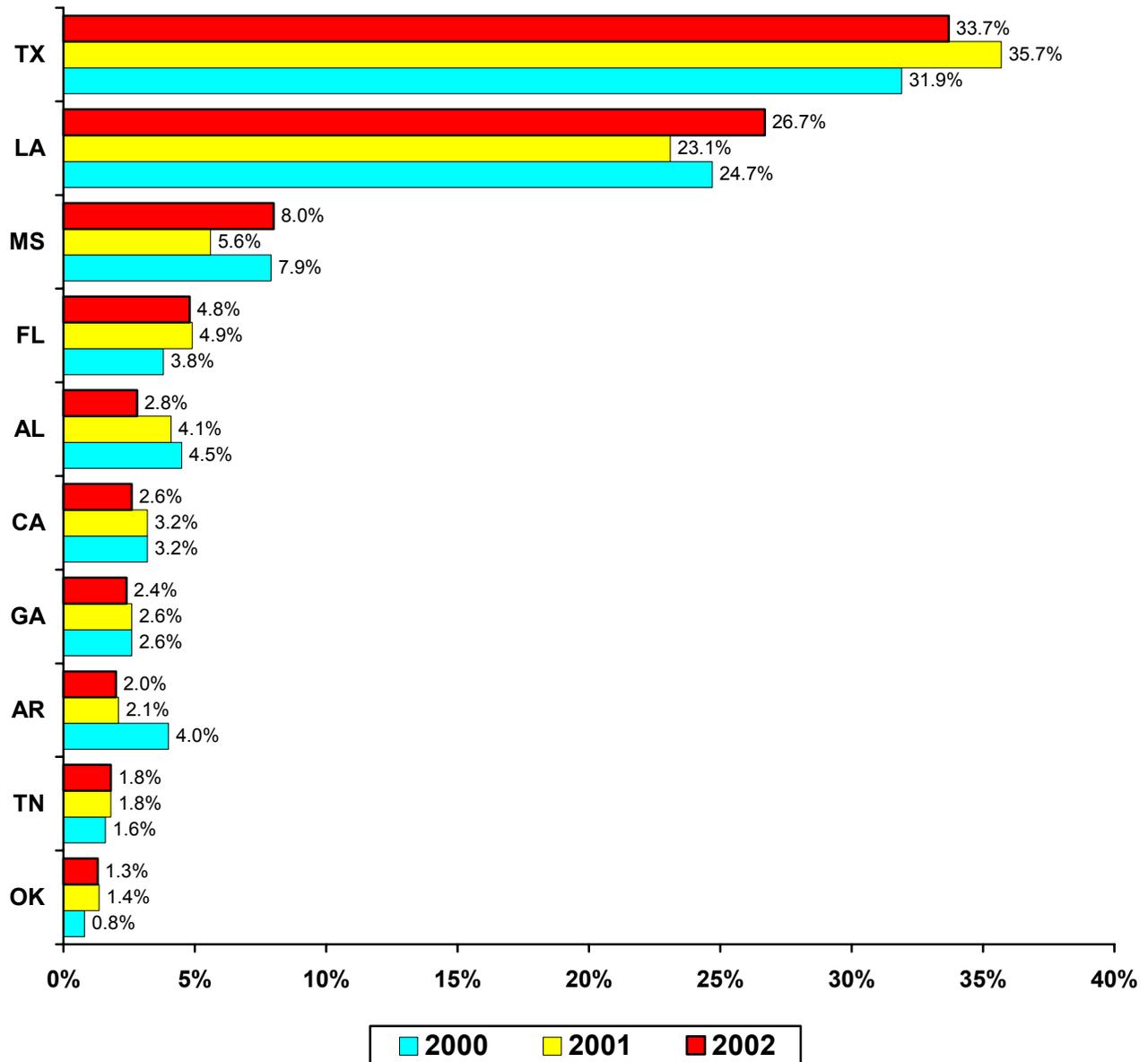
Regional travel volume to Louisiana is often driven by just a few states. Over half (53%) of the travel volume to Louisiana from the West South Central region in 2002 came from visitors originating in Texas. Another 42 percent of person-trips from the West South Central region were Louisiana residents traveling within the state. Comparatively little volume came from the other two states in the region, Arkansas (3%) and Oklahoma (2%). East South Central visitors were primarily from Mississippi (61%) and the majority of South Atlantic visitors originated in Florida (43%) or Georgia (23%). Three-quarters (75%) of visitors from the Pacific region 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 (34%) of person-trips to Louisiana in 2002. Louisiana was the second largest source of state travel, as over a quarter (27%) of person-trips originated within the state. Other states providing three percent or more of visitor volume to Louisiana in 2002 include Mississippi (8%), Florida (5%), Alabama (3%) and California (3%).

Pleasure travelers to Louisiana were more likely than business/convention travelers to come from Mississippi, Arkansas or Tennessee. Business/convention travelers were more likely than pleasure travelers to come from Alabama. Texas, Florida, California and Georgia provided similar shares of both pleasure and business/convention travel.

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 2002, 13 percent of person-trips to Louisiana originated from Houston. Another nine percent originated from Dallas-Fort Worth. Houston visitors traveled to the state about equally for business and pleasure purposes. Dallas-Fort Worth visitors, on the other hand, were significantly more likely to travel to the state for business reasons.

Other nearby cities that generated 400,000 or more Louisiana visitors in 2002 include Jackson, MS, Austin, TX, Biloxi/Gulfport, MS, Tyler-Longview, TX, San Antonio, TX and Beaumont-Port Arthur, TX.

Top Advertising Markets of Origin for 2002 Louisiana Visitors (in person trips)						
	TOTAL		PLEASURE		BUSINESS/ CONVENTION	
	Volume	Share of LA Travel	Volume	Share of LA Travel	Volume	Share of LA Travel
Houston	2,667,000	13%	1,657,000	12%	364,000	12%
Dallas – Fort Worth	2,004,000	9%	1,318,000	9%	353,000	12%
Jackson, MS	599,000	3%	351,000	2%	35,000	1%
Austin	500,000	2%	331,000	2%	35,000	1%
Biloxi – Gulfport	466,000	2%	400,000	3%	7,000	*
Tyler – Longview, TX	462,000	2%	350,000	2%	65,000	2%
San Antonio	449,000	2%	333,000	2%	101,000	3%
Beaumont – Port Arthur, TX	430,000	2%	284,000	2%	51,000	2%
Atlanta	380,000	2%	236,000	2%	66,000	2%
Mobile – Pensacola	338,000	2%	206,000	1%	47,000	2%
Los Angeles	325,000	2%	248,000	2%	22,000	1%

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

* Less than 1%

DMA/Brand Development Index (BDI)*

Based on data from 1999-2002, Biloxi-Gulfport and Beaumont-Port Arthur residents have the highest propensity to travel to Louisiana, with BDI indices of 1388 and 1368 respectively. Tyler-Longview (1161) and Hattiesburg-Laurel residents (952) also have a high propensity for travel to Louisiana.

Other cities with strong propensities for travel to Louisiana (index over 500) include Jackson, MS (728), Houston (646) and Victoria, TX (506).

**1999-2002 Brand Development Index (BDI) for
out-of-state Louisiana Markets**

City (DMA) of origin	INDEX
Biloxi-Gulfport	1388
Beaumont-Port Arthur	1368
Tyler-Longview	1161
Hattiesburg-Laurel	952
Jackson, MS	728
Houston	646
Victoria, TX	506
Mobile-Pensacola	490
Dallas-Ft. Worth	441
Abilene-Sweetwater	397
Meridian	377
Austin, TX	339
Waco-Temple-Bryan	332
Little Rock et al, AR	319
Columbus et al, MS	315
Panama City, FL	300

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

** The Brand 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, Biloxi-Gulfport households make up 0.13 percent of U.S. households, yet they take 1.8 percent of domestic household trips to Louisiana, creating a brand development index of 1388. 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 1999-2002. For a more complete chart, please see Appendix E.*

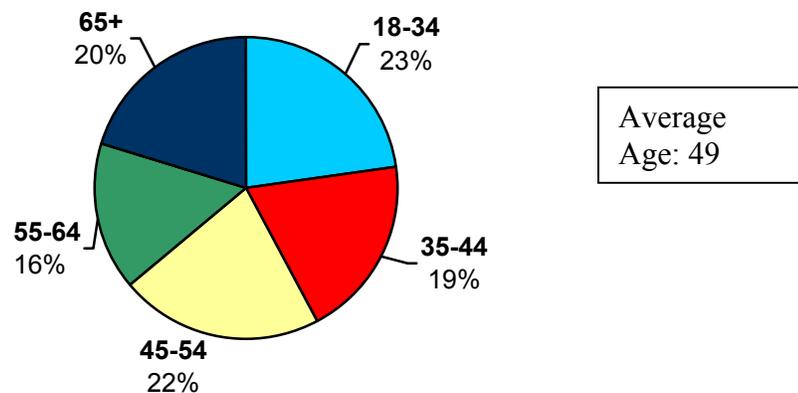
VISITOR DEMOGRAPHICS (Non-Resident Visitors)

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 22 for a summary chart of demographic variables.

Age

Non-resident Generation X and Y households, those aged 18-34, accounted for almost a quarter of trips (23%) to Louisiana in 2002. Nineteen percent of trips were taken by Baby Boomer households between 35 and 44 years old, and one in five household trips (22%) involved Baby Boomer travelers between 45 to 54 years of age. Thirty-six percent of household trips to Louisiana were taken by Mature travelers, aged 55 years or older. A higher share (36%) of Mature non-resident households (age 55+) traveled in Louisiana than in the U.S. as a whole (30%). Louisiana non-resident visitors were slightly older on average (49) than U.S. travelers (47) in 2002.

Age of Louisiana Visitors in 2002
(percent of non-resident households)



Household Size

One in five (18%) non-resident households visiting Louisiana in 2002 were single-person households. Over half (58%) included two or three members (40% two-member, 18% three-member). Twenty-four percent of non-resident visiting households included 4 or more members.

Children in Household

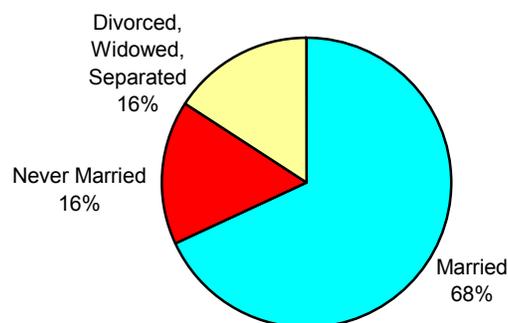
One third (34%) of non-resident trips to Louisiana were taken by households with children. In visiting households with children, there were an average of 1.8 children in the household. Sixteen percent of non-resident visiting households had just one child in the home, while 18 percent had 2 or more children.

Marital Status

Sixty-eight percent of non-resident trips to Louisiana were taken by married households. Sixteen percent each were taken by those who never married and those who were divorced, widowed or separated.

Marital Status of Louisiana Visitors in 2002

(percent of non-resident households)

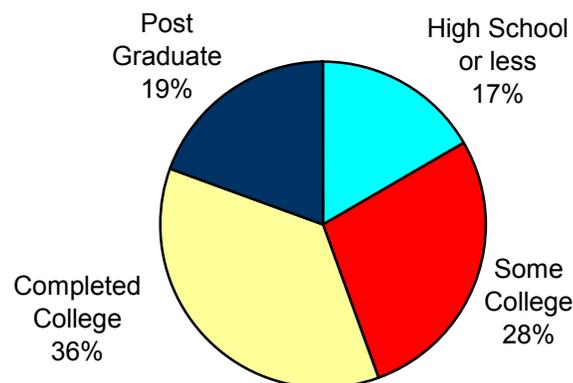


Education

Sixty-four percent of non-resident trips to Louisiana were taken by households which had either finished some college (28%) or completed college (36%). Household heads with a high school education or less generated 17 percent of non-resident person-trips. In 19 percent of visiting households, the head of household had done some post graduate work. Resident visitors were more likely than non-resident visitors to have a high school education or less (32% vs. 17%).

Education of Louisiana Visitors in 2002

(percent of non-resident households)



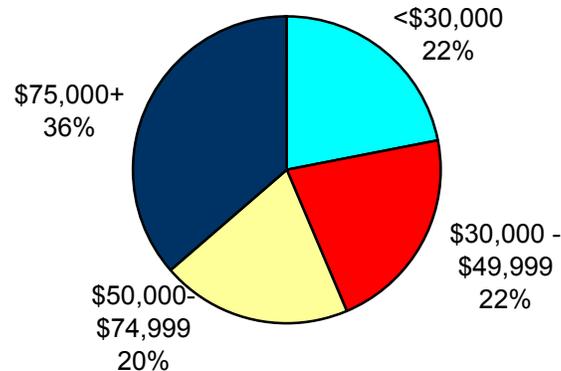
Employment

Sixty-seven percent of non-resident households visiting Louisiana in 2002 were employed full time. Seven percent were employed part time and four percent were unemployed. Twenty-two percent of non-resident households visiting Louisiana in 2002 were retired, up from 19 percent in 2001. Louisiana non-resident visiting households are more likely than the average U.S. traveling households to be retired (22% LA vs. 16% U.S.).

Income

The average annual income of non-resident households visiting Louisiana was \$69,900 in 2002, slightly higher than the average for U.S. traveling households (\$68,200). Among non-resident households taking Louisiana trips in 2002, 22 percent had annual incomes below \$30,000, 22 percent had incomes between \$30,000 and \$50,000, 20 percent had incomes between \$50,000 and \$75,000, and 36 percent had incomes over \$75,000.

**Average Annual Household Income
of Louisiana Visitors in 2002**
(percent of non-resident households)



Average (mean) income = \$69,900

Lifestage

Travel by single non-resident households to Louisiana was down considerably in 2002. Just 18 percent of trips involved single households in 2002, compared to 25 percent in 2001. Over one in four (42%) non-resident households taking trips to Louisiana were in the Parents lifestage. Couples accounted for one in three (38%) visiting households. Singles and roommates accounted for 20 percent of Louisiana trips.

Resident households traveling in Louisiana in 2002 were more likely to be from Young Couple or Middle Parent households and less likely to be from Working Older Couple, Retired Older Couple, or Older Parent households. (See Appendix C for definitions of Lifestage groups.)

Lifestage of Louisiana Visitors in 2002

(percent of non-resident household trips)

<u>Singles</u>	18%
Young Singles	7%
Middle Singles	7%
Older Singles	4%
<u>Couples</u>	38%
Young Couple	9%
Working Older Couple	15%
Retired Older Couple	14%
<u>Parents</u>	42%
Young Parent	15%
Middle Parent	9%
Older Parent	18%
<u>Roommates</u>	2%

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 continue to generate the largest share of non-resident trips to Louisiana. In fact, the top three social groups remained the same as in 2001, except the Rustic Living social group moved from second place to third. Just under 14 percent of non-resident trips to Louisiana in 2002 were taken by households in the Elite Suburbs social group. These are high education, high income households in mostly white-collar professions. Thirteen percent of trips to Louisiana in 2002 were 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 2002 non-resident Louisiana household-trips)

<u>Group</u>	<u>Percent</u>
Elite Suburbs	13.6%
Landed Gentry	13.2%
Rustic Living	9.6%

The top clusters traveling to Louisiana in 2002 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 4.6 percent of non-resident household trips to Louisiana. God's Country households, from the Landed Gentry social group, provided 4.6 percent of non-resident trips to the state. These households predominately reside outside the metropolitan beltways in coastal areas and uplands. Middle America households, from the Exurban Blues social group, provided 3.8 percent of non-resident trips to Louisiana and reside in midsize towns.

Top 10 PRIZM Clusters

(percent of 2002 non-resident Louisiana household-trips)

<u>Cluster</u>	<u>Percent</u>	<u>Social Group</u>	<u>Affluence Level</u>
Kids & Cul-de-Sacs	4.9%	Elite Suburbs	A
God's Country	4.6	Landed Gentry	B
Middle America	3.8	Exurban Blues	B
Country Squires	3.6	Landed Gentry	B
Scrub Pine Flats	3.3	Rustic Living	C
Second City Elite	3.2	2 nd City Society	A
Greenbelt Families	3.1	Landed Gentry	B
Upward Bound	3.0	2 nd City Society	A
Smalltown Downtown	2.7	2 nd City Blues	C
Winner's Circle	2.7	Elite Suburbs	A

Affluence Level:

- A: High education, high income
- B: Moderately high income, mostly suburban dwellers,
- C: Moderate or moderately low income, mostly blue collar

The top 10 PRIZM clusters by PRIZM Development Index* (measuring travel propensity) account for a quarter (26%) of household trips to Louisiana. The high propensity clusters show the same mix of high-end and low-end socioeconomic groups, and varying levels of urbanization. However, whereas the top four clusters in terms of travel volume are moderately-high to highly affluent clusters, the top four clusters by travel propensity involve moderate to low income households.

Five of the top 10 clusters for travel potential to Louisiana are also in the top 10 list by volume of visiting households (Scrub Pines Flats, Smalltown Downtown, Country Squires, Greenbelt Families and Middle America). Additional high propensity clusters include Southside City, Norma Rae-ville, Blue Blood Estates, Mid-City Mix and Boomers & Babies.

2002 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
Scrub Pine Flats	6,617	1.2%	288	3.3%	5	276
Southside City	5,577	1.0%	197	2.2%	13	224
Norma Rae-ville	5,947	1.1%	186	2.1%	17	199
Smalltown Downtown	8,425	1.5%	238	2.7%	9	179
Blue Blood Estates	7,644	1.4%	193	2.2%	15	160
Country Squires	12,583	2.3%	316	3.6%	4	159
Greenbelt Families	11,498	2.1%	272	3.1%	7	150
Middle America	14,687	2.6%	331	3.8%	3	143
Mid-City Mix	3,512	0.6%	79	0.9%	49	143
Boomers & Babies	7,557	1.4%	158	1.8%	20	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, Scrub Pine Flats households take 1.2 percent of all U.S. household trips, yet they take 3.3 percent of non-resident household trips to Louisiana, creating a brand development index of 276. 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	Total U.S.	Louisiana				
		Total	Resident	Non-Resident	Pleasure	Bus/Conv.
<u>Age of Household Head</u>						
18-34	26%	25%	33%	23%	29%	18%
35-54	43	40	37	41	34	59
55+	30	35	30	36	37	23
Average (mean) age	47 years	48 years	45 years	49 years	48 years	46 years
<u>Household Size</u>						
One person	21%	18%	16%	18%	20%	9%
Two people	36	40	42	40	43	39
Three people	18	18	17	18	17	18
Four people	16	13	13	14	11	21
Five or more people	11	11	12	10	9	13
<u>Children in Household</u>						
None	65%	65%	64%	66%	70%	54%
One	16	16	14	16	15	20
Two	13	12	13	11	9	17
Three or more	7	7	9	7	6	8
Mean (excluding none)	1.8	1.8	1.9	1.8	1.8	1.8
<u>Marital Status</u>						
Married	64%	67%	63%	68%	64%	83%
Never married	18	16	17	16	19	8
Divorced, Widowed, Separated	17	17	20	16	17	10
<u>Education</u>						
High school education or less	20%	21%	32%	17%	22%	16%
Some college – no degree	25	28	30	28	30	16
Completed College	36	34	27	36	32	44
Post graduate work	19	17	11	19	16	24
<u>Employment</u>						
Full time	72%	68%	71%	67%	62%	86%
Part time	7	8	8	7	10	6
Retired	16	21	17	22	24	7
Not employed	4	4	4	4	4	1
<u>Annual Household Income</u>						
Less than \$30,000	22%	26%	39%	22%	28%	11%
\$30,000-\$49,999	21	22	22	22	23	17
\$50,000-\$74,999	22	20	19	20	22	16
\$75,000 or more	35	32	19	36	26	56
Mean	\$68,200	\$65,000	\$50,300	\$69,900	\$58,200	\$91,400

Demographics are for the head of household.

Details may not add to 100% due to rounding.

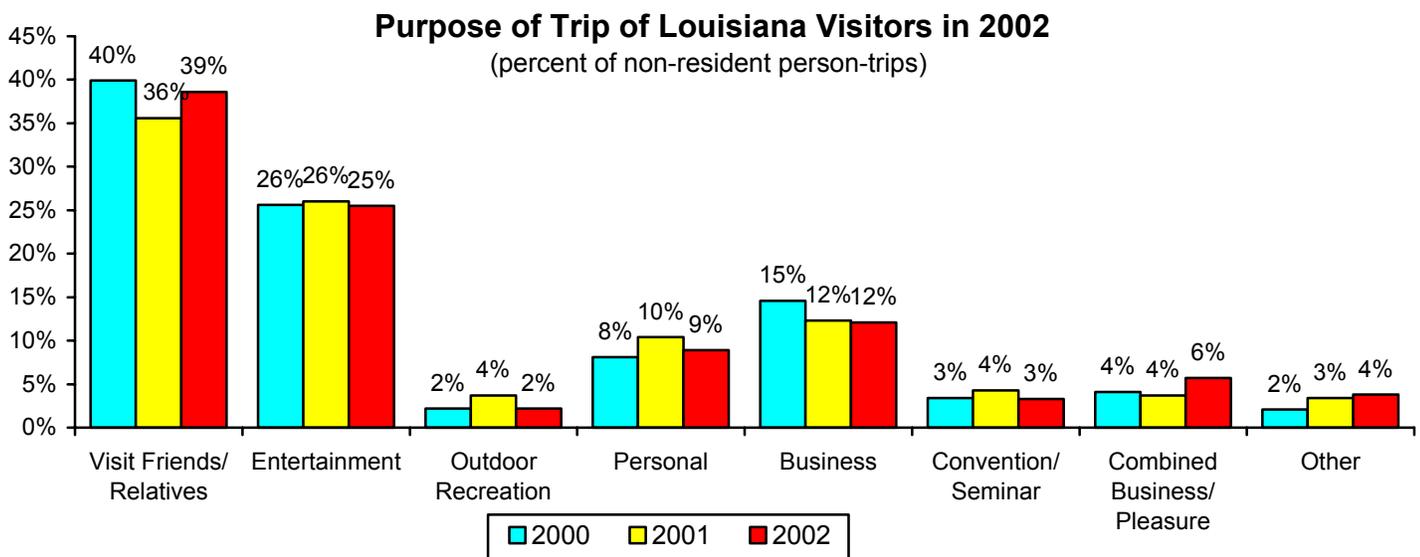
* Less than 1%.

TRIP CHARACTERISTICS (Non-Resident Visitors)

Primary Purpose of Trip

The majority of non-resident visitors to Louisiana traveled for pleasure purposes in 2002. Pleasure visitors generated two-thirds (66%) of non-resident person-trips to Louisiana. Pleasure visitors are travelers whose purpose is visiting friends and relatives, entertainment or outdoor recreation. Visiting friends/relatives accounted for over one-third (39%) of all non-resident person-trips to Louisiana. A quarter (25%) of Louisiana person-trips were for entertainment purposes. Travel to Louisiana for personal reasons accounted for nine percent of non-resident person-trips in 2002.

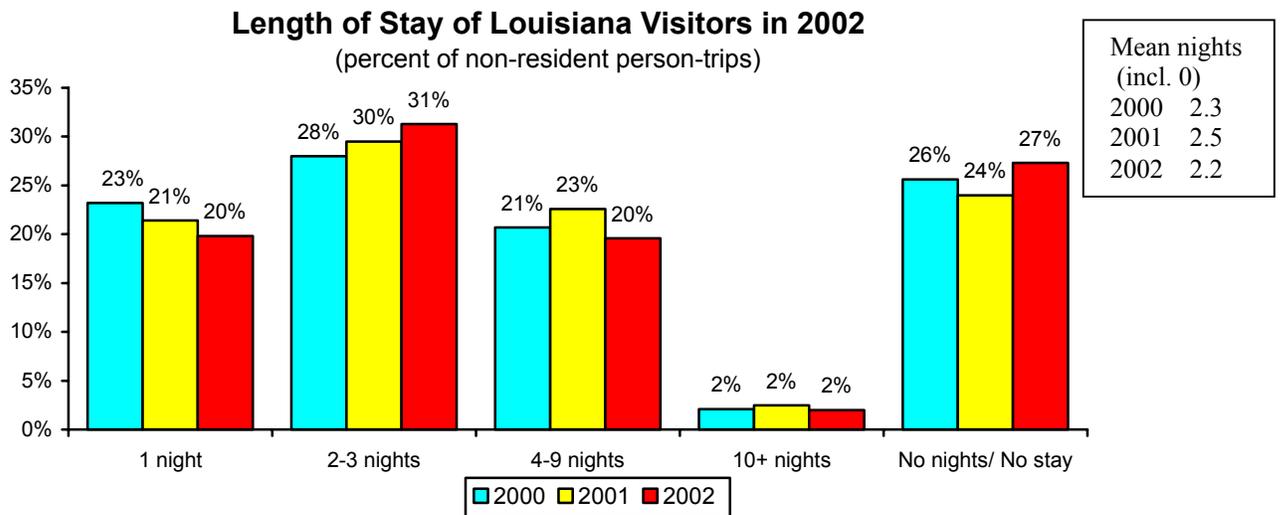
Fifteen percent of non-resident visitors traveled to Louisiana for business or convention purposes. The share of combined business/pleasure person-trips increased, up to six percent in 2002 from four percent in 2001.



Length of Stay

Almost three-quarters (73%) of Louisiana non-resident visitors spent one or more nights in the state in 2002. Overnight trips lasted an average of 3.1 nights. Including day trips, non-resident Louisiana trips lasted 2.2 nights on average. This was down slightly from 2001 (2.5 nights).

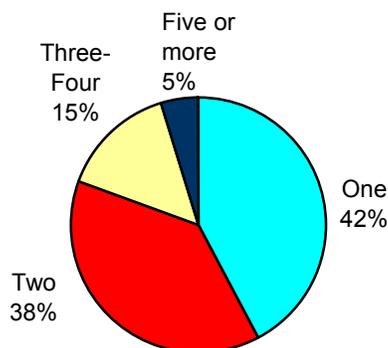
One in five non-resident visitors to Louisiana spent just one night in the state. Almost a third spent 2-3 nights in the state. Another 20 percent spent from 4-9 nights in the state. Twenty-seven percent were visiting just for the day.



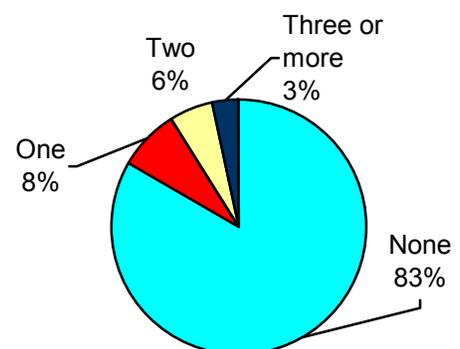
Travel Party Size and Presence of Children

Four in ten (42%) non-resident trips to Louisiana involved one person from the household. Over a third of trips (38%) included two household members, while 20 percent of trips involved three or more household members. Seventeen percent of non-resident trips to Louisiana in 2002 involved children. Residents (29%) were more likely to travel with children than non-residents (17%).

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



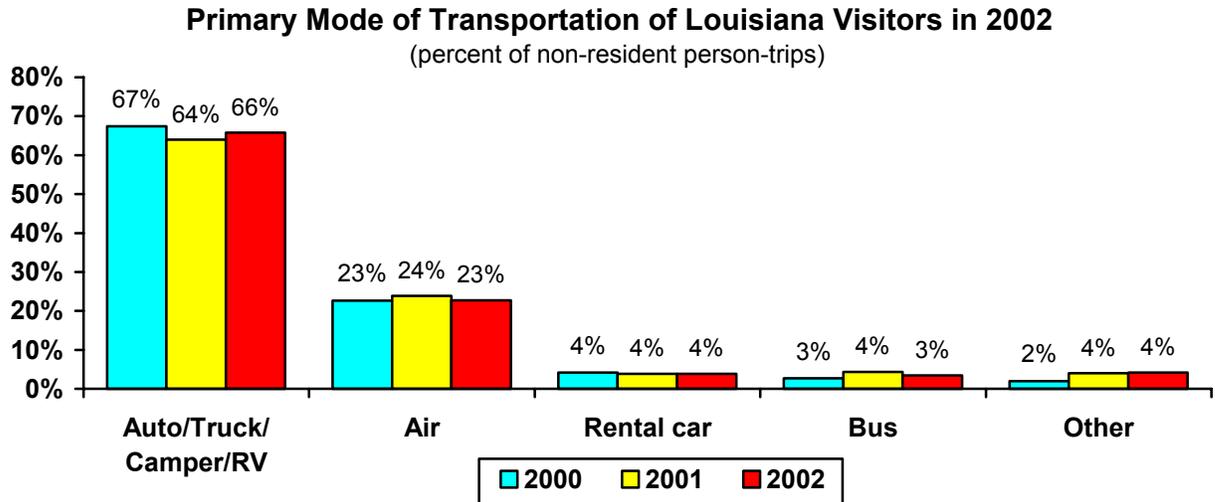
Presence of Children on Trip
(percent of non-resident household trips)



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

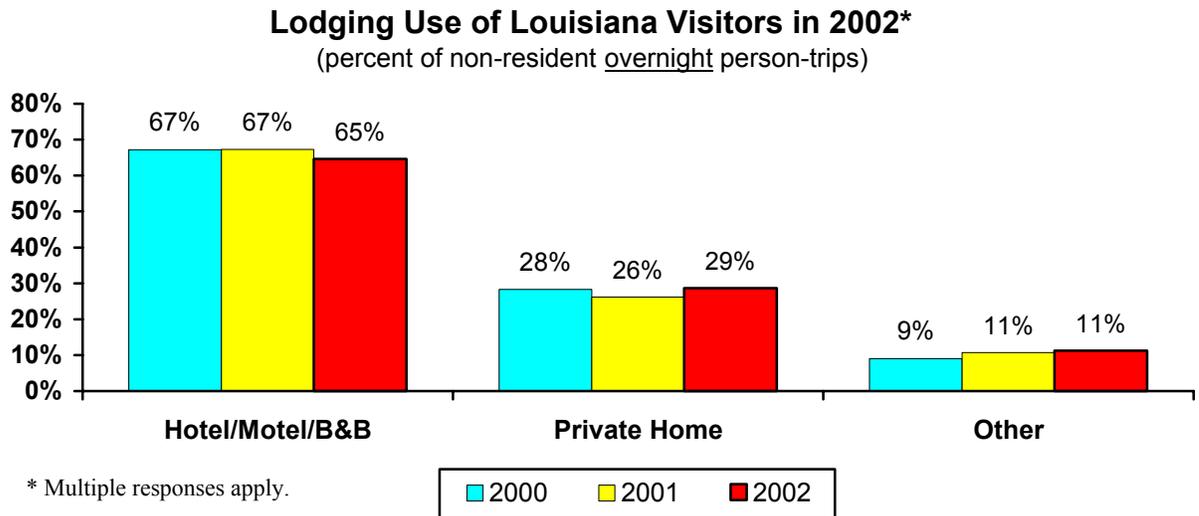
Primary Mode of Transportation

In Louisiana, as in the U.S. as a whole, the majority of travel is by personal auto/truck/camper/RV. In 2002, 66 percent of non-resident person-trips to Louisiana were by auto, truck or camper. Four percent of non-resident visitors to the state used rental cars as a primary mode of transportation, and seven percent used rental cars as a secondary mode of transportation. Almost a quarter (23%) of Louisiana non-resident person-trips were by air, down only slightly from 2001. Other transportation types, including bus, train and boat, accounted for seven percent of person-trips.



Lodging Use

Of the 11.5 million non-resident overnight visitors to Louisiana, almost two-thirds (65%) included stays in hotels, motels or B&Bs. The share of non-resident visitors using hotels was down slightly from 2001 (67% in 2001 vs. 65% in 2002). Almost one in three (29%) non-resident overnight visitors stayed in a private home, while 11 percent stayed in other lodging accommodations



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

Travel to Louisiana remains fairly evenly distributed across the seasons. In 2002, summer had the highest share of travel (30% total and 29% non-resident). The heaviest single months were June and July, each accounting for 11 percent of total person-trips. Fall was the slowest season (21% total and 20% non-resident).

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

	Total	Non-resident		Total	Non-resident
<u>Winter</u>	23%	26%	<u>Summer</u>	30%	29%
January	7	7	June	11	12
February	7	9	July	11	10
December	9	10	August	8	7
<u>Spring</u>	26%	25%	<u>Fall</u>	21%	20%
March	10	9	September	7	7
April	8	8	October	7	6
May	8	8	November	7	7

Cities Visited

New Orleans is the most popular city destination within Louisiana. Forty-five percent of non-resident visitors traveled to New Orleans in 2002. Fourteen percent of non-resident person-trips were to Shreveport-Bossier City, seven percent to Baton Rouge, eight percent to Lake Charles, five percent to Lafayette, two percent to Monroe and one percent to Alexandria. (See Appendix G for explanation of city volume estimates.)

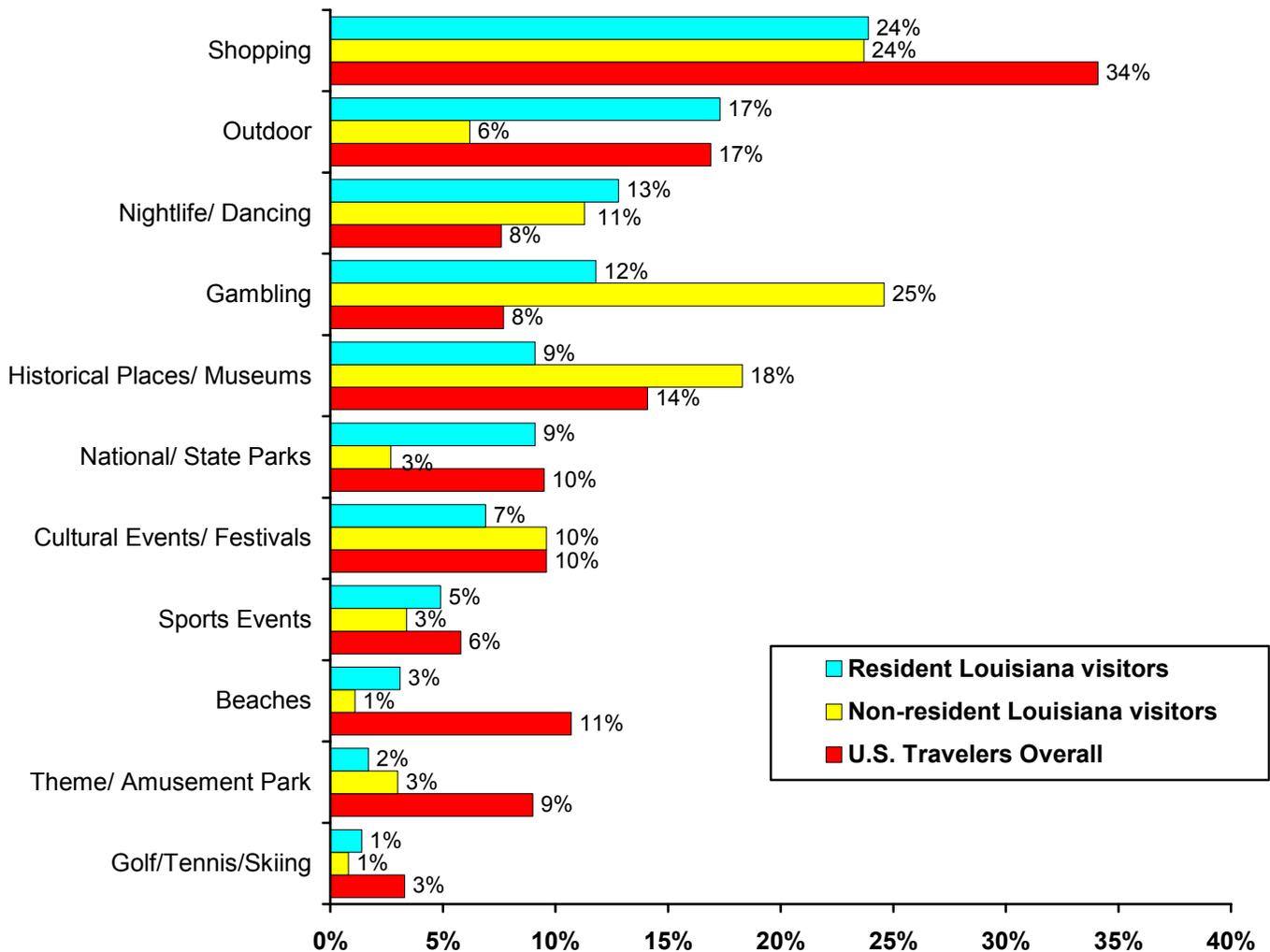
2002 Top Cities Visited within Louisiana (percent/count of non-resident person-trips)		
City	Estimated Volume	
	Percent*	Count
New Orleans	45%	6,017,000
Shreveport-Bossier City	14	1,918,000
Baton Rouge	7	944,000
Lake Charles	8	1,113,000
Lafayette	5	662,000
Monroe	2	292,000
Alexandria	1	196,000

* Travelers may visit multiple cities on the same trip.

Trip Activities

Gambling remains the most popular activity for non-resident visitors to Louisiana. In 2002, a quarter (25%) of non-resident visitors included gambling as a trip activity, compared to just 12 percent of resident visitors. Nationally, just eight percent of travelers gamble while on a trip. Shopping was the most popular activity for resident visitors (24%) and second most popular for non-resident visitors (24%). Shopping is the most popular activity for U.S. domestic travelers overall (34%). Visiting historic places/museums ranks third in share of non-resident person-trips (18%) and fifth for resident visitors (9%). Outdoor activities are more popular with resident visitors (17% resident vs. 6% non-resident).

Trip Activities by 2002 Travelers*
(percent of person-trips)

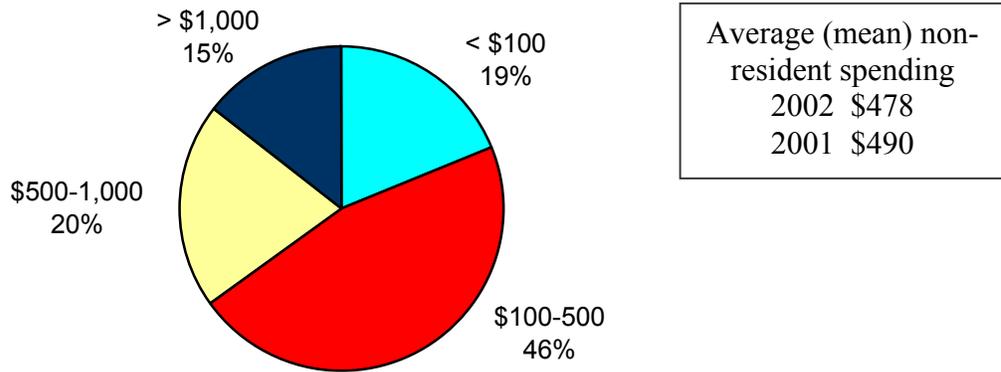


* Multiple responses allowed.

Spending*

Average trip spending by Louisiana visitors declined in 2002. Non-resident households visiting Louisiana spent an average of \$478 while visiting the state, down two percent from 2001. Forty-six percent of non-resident visitors spent between \$100 and \$500 while in Louisiana. About a third (35%) of trips to Louisiana involved \$500 or more in spending. Just one in five non-resident visitors (19%) spent less than \$100. Residents spent less than non-resident visitors. Average spending per resident household was just \$146 in 2002, down from \$235 in 2001.

Trip Spending In-State by Louisiana Visitors in 2002
(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 5 origin states are analyzed using data from 2000-2002. During this period, households visiting from California spent the most on average (\$774). Mississippi visitors spent the least (\$238). Texas, Florida and Alabama visiting households had similar spending levels (\$335-\$377). 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 2000-2002 household-trips)

State of Origin	Average Spending (per household per trip)	Average number of trips per year (in thousands of hh trips)
Texas	\$377	4,145
Mississippi	\$238	787
Florida	\$335	570
Alabama	\$348	452
California	\$774	409

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

Other States Visited

In 2002, 22 percent of non-resident Louisiana visitors also visited Mississippi, while 19 percent also visited Texas on the same trip. One in ten (13%) also included Alabama on their trip. Other states with significant cross travel include Florida, Arkansas, Tennessee and Georgia.

2002 Other States Visited on Louisiana Trips (percent of non-resident person-trips)		
State	Total Visitors	Non-resident Visitors
Mississippi	19%	22%
Texas	16%	19%
Alabama	11%	13%
Florida	7%	9%
Arkansas	3%	3%
Tennessee	3%	3%
Georgia	2%	2%

Group Tour Participation

Of Louisiana non-resident visitors in 2002, seven percent participated in group tours (1 million visitors). This was significantly higher than the U.S. average of three percent.

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 underrepresentation 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 2002, Louisiana ranked first in share of African-American travel among all fifty states. African-American households generated thirteen percent of person-trips in the state. Other minority groups accounted for three percent of Louisiana person-trips. Mississippi, Georgia, and South Carolina also had high shares of African-American visitors in 2002 (10%-11%). 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

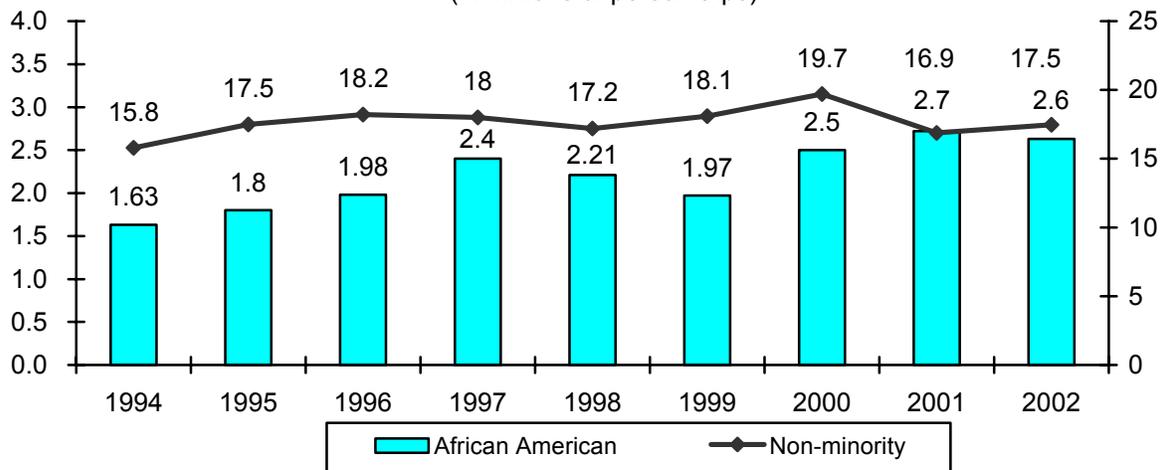
<u>State</u>	<u>Percent of State's Person-trip Visitors</u>
Louisiana	13%
Mississippi	11
South Carolina	11
Georgia	10

Trends

An estimated 2.6 million African-Americans traveled in the state in 2002, a decrease of three percent over 2001. By comparison, non-minority travel increased three percent to 17.5 million.

Pleasure travel by African-American visitors to Louisiana increased by three percent in 2002. Business travel represented just seven percent of African-American person-trips to Louisiana in 2002, down from 11 percent in 2001.

African-American and Non-minority Volume Trends to Louisiana 1994-2001
(in millions of person-trips)



Trip Characteristics

African-American travelers to Louisiana in 2002 were similar to Louisiana travelers in general in that they traveled most for pleasure, traveled mostly by car, enjoyed shopping, 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 (51% African-American vs. 40% total) and less likely to be traveling for business (7% African-American vs. 19% total).
- Less likely to travel to Louisiana by air (12% African-American vs. 17% total) but were somewhat more likely to use a rental car as a primary mode of transportation (5% vs. 3%).
- More likely to travel in the summer months, June-August (39% African-American vs. 30% total).
- More likely to be from Arkansas (6% African-American vs. 2% total), Mississippi (20% vs. 8%) or North Carolina (4% vs. <1%), and less likely to be from Texas (22% African-American vs. 34% total).
- Less likely to stay in a hotel, motel or B&B (33% African-American vs. 42% total)
- More likely to shop (30% African-American vs. 24% total), participate nightlife/dancing (20% vs. 12%) and gamble while in Louisiana (24% vs. 21%), and less likely to visit historical places/museums (8% vs. 16%) or participate in outdoor activities (6% vs. 9%).
- Less likely to travel alone (33% African-American vs. 41% total) and more likely to travel with children (28% African-American vs. 20% total).
- Less likely to be married (48% African-American vs. 67% total) and more likely to have children in the household (48% vs. 35%).
- Less likely to have average annual household incomes of \$50,000 or more (33% African-American vs. 52% total).
- Spending slightly less per household on Louisiana trips (\$359 African-American vs. \$405 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 2000-2002. Visitors by origin state are compared to all 2002 non-resident travelers to Louisiana.

Visitors from Texas are:

- ◆ More likely to travel to Louisiana for pleasure purposes (72% TX vs. 66% total non-resident)
- ◆ More likely to travel by auto, truck or RV (83% TX vs. 70% total non-resident)
- ◆ Spending less per household per trip (\$377 TX vs. \$478 total non-resident)
- ◆ More likely to visit Shreveport (23% TX vs. 18% total non-resident) and less likely to visit New Orleans (18% vs. 53%)
- ◆ From households with slightly lower average annual incomes (\$62K TX vs. \$70K total non-resident)

Visitors from Mississippi are:

- ◆ More likely to travel to Louisiana for pleasure purposes (71% MS vs. 66% total non-resident)
- ◆ Most likely to travel by auto, truck or RV (91% MS vs. 70% total non-resident)
- ◆ Less likely to spend the night (66% MS vs. 73% total non-resident)
- ◆ Less likely to stay in a hotel, motel or B&B (52% MS vs. 65% total non-resident)
- ◆ More likely to visit Baton Rouge (11% MS vs. 8% total non-resident) and less likely to visit New Orleans (40% vs. 53%), Shreveport (2% vs. 18%) or Lake Charles (2% vs. 10%)
- ◆ Less likely to gamble while visiting Louisiana (9% MS vs. 25% total non-resident)
- ◆ Spending less (\$238 MS vs. \$478 total non-resident)
- ◆ More likely to be from African-American households (25% MS vs. 12% total non-resident)
- ◆ From households with slightly lower average annual incomes (\$53K MS vs. \$70K total non-resident)
- ◆ Younger (avg. age 45 years MS vs. 49 total non-resident)
- ◆ More likely to have children in the household (47% MS vs. 34% total non-resident)

Visitors from Florida are:

- ◆ More likely to travel to Louisiana for pleasure purposes (73% FL vs. 66% total non-resident)
- ◆ More likely to travel by air (30% FL vs. 23% total non-resident)
- ◆ Less likely to spend the night (69% FL vs. 73% total non-resident)
- ◆ Less likely to visit Shreveport (3% FL vs. 18% total non-resident) or Lake Charles (1% vs. 10%)
- ◆ Less likely to gamble (12% FL vs. 25% total non-resident) or visit historic places/museums (14% vs. 18%) and more likely to participate in nightlife/dancing (17% vs. 11%)
- ◆ Less likely to be from African-American households (5% FL vs. 12% total non-resident)
- ◆ From households with slightly lower average annual incomes (\$61K FL vs. \$70K total non-resident)

Visitors from Alabama are:

- ◆ More likely to travel by auto, truck or RV (81% AL vs. 70% total non-resident)
- ◆ Less likely to spend the night (68% AL vs. 73% total non-resident) but staying longer when they do stay overnight (avg. overnight duration 3.4 nights AL vs. 3.1 nights total non-resident)
- ◆ Less likely to gamble (6% AL vs. 25% total non-resident), or shop (20% vs. 24%) and more likely to visit cultural events/Festivals (16% vs. 10%)
- ◆ Less likely to visit Shreveport (1% AL vs. 18% total non-resident) or Lake Charles (1% vs. 10%)
- ◆ Less likely to be from African-American households (7% AL vs. 12% total non-resident)
- ◆ Spending less (\$348 AL vs. \$478 total non-resident)

Visitors from California are:

- ◆ Most likely to be traveling for business purposes (26% CA vs. 21% total non-resident)
- ◆ Most likely to travel by air (74% CA vs. 23% total non-resident)
- ◆ Most likely to stay overnight (86% CA vs. 73% total non-resident)
- ◆ Most likely to shop while visiting the state (32% CA vs. 24% total non-resident), visit historical places/museums (34% vs. 18%), participate in nightlife/dancing (26% vs. 11%) and visit cultural events/Festivals (27% vs. 10%)
- ◆ Spending more (\$774 CA vs. \$478 total non-resident)
- ◆ From households with high average annual incomes (\$92K CA vs. \$70K total non-resident)
- ◆ Slightly younger (avg. age 47 years CA vs. 49 total non-resident)

Summary Table of Trip Characteristics by Origin State

TRIP CHARACTERISTICS	Louisiana non-resident visitors (2002)	Top Origin States of Louisiana Visitors (based on data from 2000-2002)				
		Texas	Mississippi	Florida	Alabama	California
Non-resident Louisiana visitors						
Person-trips	100%	45%	10%	6%	5%	4%
Household-trips	100%	44%	8%	6%	5%	4%
TRIP CHARACTERISTICS - in person-trips						
Primary Purpose of Trip						
Pleasure	66%	72%	71%	73%	69%	65%
Business	21	16	19	19	18	26
Primary Mode of Transportation						
Auto	70%	83%	91%	61%	81%	21%
Air	23	9	2	30	12	74
Trip Duration						
Percent Overnight	73%	72%	66%	69%	68%	86%
Average trip duration (including day-trips)	2.2 nights	1.8 nights	1.4 nights	2.4 nights	2.2 nights	4.4 nights
Average OVERNIGHT trip duration	3.1 nights	2.6 nights	2.2 nights	3.5 nights	3.4 nights	5.1 nights
Lodging Use (% overnight person-trips)						
Hotel/Motel/B&B	65%	66%	52%	63%	67%	65%
Private Home	29	27	42	29	25	30
Top Activities						
Gambling	25%	41%	9%	12%	6%	17%
Shopping	24	16	27	24	20	32
Historical places/Museums	18	8	14	14	16	34
Nightlife/Dancing	11	7	7	17	8	26
Cultural events/Festivals	10	4	11	7	16	27
Top MSAs of Destination						
New Orleans	53%	18%	40%	51%	48%	70%
Shreveport	18	23	2	3	1	6
Baton Rouge	8	6	11	10	7	1
Lake Charles	10	13	2	1	1	2
Lafayette	6	5	7	3	5	2
Race*						
Non-minority	84%	86%	73%	90%	90%	75%
African-American	12	11	25	5	7	14
TRIP CHARACTERISTICS - in household-trips						
Trip Spending						
Average trip spending per household	\$478	\$377	\$238	\$335	\$348	\$774
Travel Party Size						
Average Travel Party Size	2.0	2.0	2.2	2.0	2.0	1.8
DEMOGRAPHICS - in household-trips						
Household Income						
Average annual income	\$69,900	\$62,100	\$53,200	\$60,500	\$64,300	\$92,100
Age of Household Head						
Average age	49	50	45	49	48	47
Children in Household						
Percent with children	34%	34%	47%	37%	34%	23%

Demographics are for the head of household.

COMPETITIVE COMPARISON

This section compares characteristics of Louisiana travel to a competitive group of states including Texas, Mississippi, Alabama, Tennessee, Georgia and Florida. 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

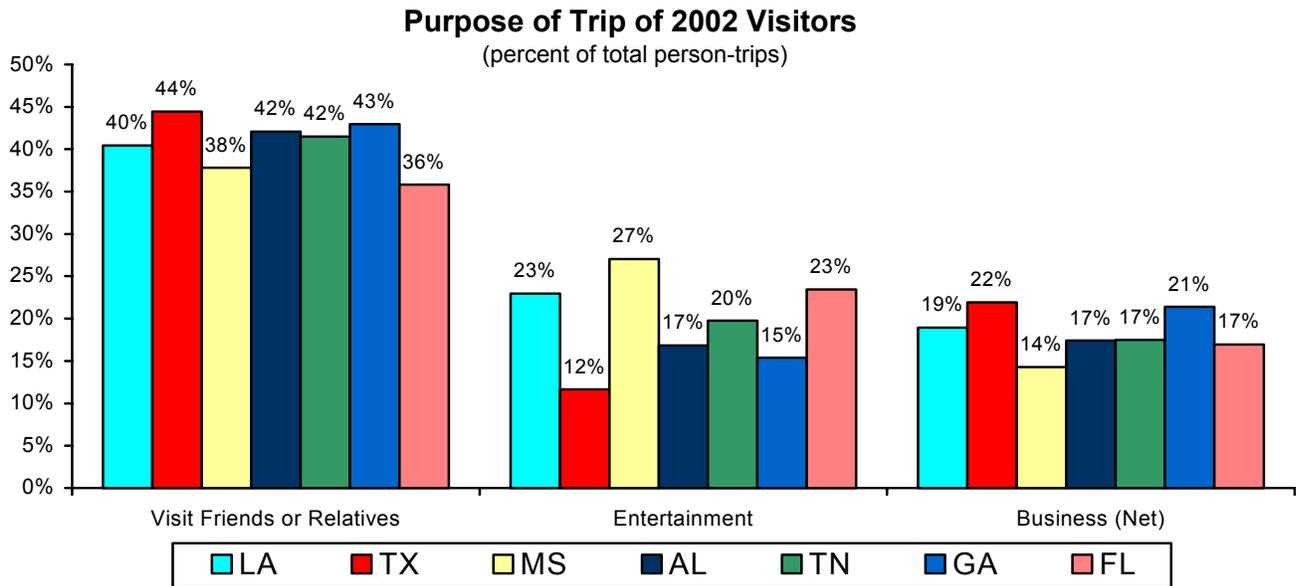
All six competitive states and Louisiana experienced growth in travel volume in 2002 over 2001. The largest increase was seen in Florida, with an eight percent increase in volume over 2001. Tennessee, Georgia, Alabama, and Mississippi each saw the same increase as Louisiana (2% above 2001 volumes). Texas had the smallest increase in travel volume in 2002 (+1%).

Across the competitive states, Texas had the lowest proportion of non-resident travel (34%). Sixty-three percent of person-trips to Florida were by out-of-state travelers. Alabama and Louisiana had a similar share of non-resident travel (72% and 73% respectively). Georgia (77%), Tennessee (80%) and Mississippi (81%) experienced the highest proportion of non-resident travel of these competitive states.

Competitive States' Visitor Volumes			
Visitors to:	Total Visitor Volume (in millions of person-trips)	Change from 2001	Percent non- resident travel
Louisiana	21.2 million	2%	73%
Texas	73.1	1	34
Mississippi	21.6	2	81
Alabama	23.3	2	72
Tennessee	38.9	2	80
Georgia	42.0	2	77
Florida	83.1	8	63

Purpose of Trip

Reasons for traveling were generally similar across the competitive set of six states in 2002, with a few exceptions. While visiting friends and relatives was the most common purpose of trip across all states, Texas had the highest share (44%) of travel to visit friends or relatives and Florida had the lowest share (36%). Trips for entertainment purposes were more predominant in Mississippi (27%), Louisiana and Florida (23% each). Business trips accounted for roughly a fifth of person-trips to each state with the exception of Mississippi where only 14 percent of person-trips are for business purposes. Texas has the highest share of business travel (22%) among these competitive states.



Transportation Mode

The proportion of auto travel to Louisiana (77% of person-trips) was similar to the national domestic travel average (79%) in 2002. 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 (87%), Alabama (88%) and Tennessee (87%). Texas and Georgia had similar rates of auto travel (79% and 80% respectively), while Florida visitors traveled much less by auto (65%) and more by air (30%). Seventeen percent of Louisiana visitors traveled by air, as did 16 percent of Texas visitors and 15 percent of Georgia visitors. Eight percent or less of person-trips to Mississippi, Alabama and Tennessee were by air.

Trip Duration

Florida had the longest average in-state trip duration (4.3 nights) and the smallest share of day trips (11%). Texas visitors stayed an average of 2.5 nights, while Louisiana visitors averaged 2.0 nights in the state. Nineteen percent of Texas person-trips were for day-trips only, compared to 27 percent of Louisiana person-trips. Shorter average trip durations were seen in Mississippi (1.8), Georgia (1.9), Tennessee (1.9) and Alabama (1.4). Alabama had the highest share of day trip travel (47%) while over a third of person-trips to Mississippi (34%), Tennessee (34%) and Georgia (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 2002. The share of hotel/motel/B&B use by overnight visitors was highest in Mississippi (65%) and Tennessee (61%). Fifty-eight percent of visitors to Georgia and Louisiana used hotels, motels and B&Bs, while roughly half of the person-trips to Florida (54%) and Texas (50%) involved hotel/motel/B&B lodging. Alabama visitors were least likely to use hotels, motels and B&Bs (43%).

Private home use was the second most popular lodging type. Roughly four in ten visitors to Texas (42%), Alabama (39%) and Georgia (38%) stayed in private homes. Around a third of visitors to Louisiana (33%), Florida (32%) and Tennessee (27%) lodged in private homes. Twenty-six percent of visitors to Mississippi used private home lodging.

Florida (15%) and Alabama (7%) and Tennessee (5%) were the only competitive states with any significant 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 (34%). Around a third of visitors to Florida (34%), Texas (32%) and Tennessee (29%) enjoyed shopping while in the state. Twenty-four percent of Louisiana visitors participated in shopping activities, similar to Alabama (22%) and Georgia (26%). 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 30 percent of Mississippi person-trips involved gambling. One in five (21%) Louisiana person-trips included gambling while in the state, making it the second most popular activity after shopping.

Visiting historical places/museums was the third most popular activity in Louisiana (16%), as it was with overall U.S. domestic travelers (14%). In several states, outdoor activities or visits to national/state parks vied with historic places/museums in popularity. There were similar shares of participation in visits to historic places/museums and outdoor activities in Texas (13% each), Mississippi (7% historical vs. 9% outdoor) and Alabama (9% historical vs. 8% outdoor). Visiting national/state parks was equally as popular as historical places in Tennessee (12% each). Outdoor activities were more popular than historic places/museums in Florida (9% historical vs. 12% outdoor).

In-State Trip Activities Comparison for 2002 Visitors

(percent of person-trips)

	Louisiana	Texas	Mississippi	Alabama	Tennessee	Georgia	Florida
<u>Trip Activities*</u>							
Shopping	24%	32%	17%	22%	29%	26%	34%
Gambling	21	1	30	1	2	1	2
Historic places/ Museums	16	13	7	9	12	12	9
Nightlife/Dancing	12	6	5	2	5	6	8
Cultural events/Festivals	9	8	5	4	7	6	6
Outdoor	9	13	9	8	9	7	12
National/State park	4	5	3	3	12	6	6
Sports event	4	6	4	4	4	5	5
Theme/Amusement parks	3	7	3	3	8	5	28
Beaches	2	5	5	9	1	3	30
Golf/Tennis/Skiing	1	1	1	1	2	2	5

* Multiple responses allowed

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 2002, five percent (or 3.4 million) also visited Louisiana on the same trip. Nineteen percent of Mississippi's 22 million visitors also visited Louisiana. As did 10 percent of Alabama's 23 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			
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	73.1 million	5%	3.4 million
Mississippi	21.6	19	4.1
Alabama	23.3	10	2.2
Tennessee	38.9	1	0.5
Georgia	42.0	1	0.4
Florida	83.1	2	1.5

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),
- whether the trip was a group tour,
- up to three states or countries visited on each trip,
- key cities/places visited in each state/country,
- the number of nights in each type of accommodation,
- trip expenditures, and
- activities.

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

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

Estimate of Sampling Error

	<u>Sample Size</u>	<u>Sampling Error*</u>
Total Households	57,274	+/- 0.4%
Louisiana visiting households	1,653	+/- 2.4%
Non-resident households visiting Louisiana	969	+/- 3.2%
African-American households visiting Louisiana	181	+/- 7.3%

* At the 95 percent confidence level.

TRAVELSCOPE SURVEY CARD

Please complete for each **pleasure or business trip** taken in the month of **SEPTEMBER** — where you and/or other members of your household (HH) traveled **50 miles or more, one-way, away from home or spent one or more overnights**. **DO NOT** include trips commuting to/from work or school or trips taken as a flight attendant or vehicle operator. # OF TRIPS: ____ If you **DID NOT TRAVEL** for business or pleasure, 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.)

33919	SEPTEMBER Trip #1 Purpose (See Codes)	Trans- portation (See Codes)	# HH Members Traveling Age 0-17 # ____ Age 18+ # ____	List States/ Countries Visited (X if passed through only)	Key Cities & Places Visited In That State/ Country	# Nights In Each State/Country In:					Total \$ Spent Per State/ Country	Activities In State/Country (See Codes)
	Primary: ____	Primary: ____	Group Tour 1 <input type="checkbox"/> Yes 2 <input type="checkbox"/> No	<input type="checkbox"/> 1. ____ <input type="checkbox"/> 2. ____ <input type="checkbox"/> 3. ____		Hotel/ Motel/ B&B	Pri- vate Home	Condo/ Time Share	RV/ Tent	Other	\$ ____	
	Secondary: ____	Secondary: ____				# ____	# ____	# ____	# ____	# ____	\$ ____	
						# ____	# ____	# ____	# ____	# ____	\$ ____	
						# ____	# ____	# ____	# ____	# ____	\$ ____	

ANSWER THIS SIDE FIRST	PURPOSE CODES	TRANSPORTATION CODES	ACTIVITY CODES
<input type="checkbox"/>	1=Visit friends or relatives 2=Outdoor recreation 3=Entertainment (e.g., sightseeing, sports) 4=Combined business/pleasure 5=Convention/seminar 6=Business 7=Personal 8=Other	1=Own Auto/Truck 2=Rental car 3=Camper/RV 4=Ship/Boat 5=Airplane 6=Bus 7=Train 8=Other	01=Historical places/Museums 02=National/State Park 03=Cultural events/Festivals 04=Theme/Amusement Park 05=Outdoor (e.g., hunt, fish, hike) 06=Shopping 07=Nightlife/Dancing 08=Beaches 09=Golf/Tennis/Skiing 10=Sports event 11=Gambling

CONTINUE →

33919	SEPTEMBER Trip #2 Purpose (See Codes)	Trans- portation (See Codes)	# HH Members Traveling Age 0-17 # ____ Age 18+ # ____	List States/ Countries Visited (X if passed through only)	Key Cities & Places Visited In That State/ Country	# Nights In Each State/Country In:					Total \$ Spent Per State/ Country	Activities In State/Country (See Codes)
	Primary: ____	Primary: ____	Group Tour 1 <input type="checkbox"/> Yes 2 <input type="checkbox"/> No	<input type="checkbox"/> 1. ____ <input type="checkbox"/> 2. ____ <input type="checkbox"/> 3. ____		Hotel/ Motel/ B&B	Pri- vate Home	Condo/ Time Share	RV/ Tent	Other	\$ ____	
	Secondary: ____	Secondary: ____				# ____	# ____	# ____	# ____	# ____	\$ ____	
						# ____	# ____	# ____	# ____	# ____	\$ ____	
						# ____	# ____	# ____	# ____	# ____	\$ ____	

ANSWER OTHER SIDE FIRST	PURPOSE CODES	TRANSPORTATION CODES	ACTIVITY CODES
<input type="checkbox"/>	1=Visit friends or relatives 2=Outdoor recreation 3=Entertainment (e.g., sightseeing, sports) 4=Combined business/pleasure 5=Convention/seminar 6=Business 7=Personal 8=Other	1=Own Auto/Truck 2=Rental car 3=Camper/RV 4=Ship/Boat 5=Airplane 6=Bus 7=Train 8=Other	01=Historical places/Museums 02=National/State Park 03=Cultural events/Festivals 04=Theme/Amusement Park 05=Outdoor (e.g., hunt, fish, hike) 06=Shopping 07=Nightlife/Dancing 08=Beaches 09=Golf/Tennis/Skiing 10=Sports event 11=Gambling

Not shown actual size.

GLOSSARY OF TERMS

Activities	TravelScope gathers information on 11 different activity categories: (1) visits to historical places or museums; (2) visits to national or state parks; (3) attending cultural events or festivals; (4) going to theme or amusement parks; (5) outdoor activities (e.g., hunting, fishing, hiking); (6) shopping; (7) night life or dancing; (8) going to the beach; (9) playing golf, tennis or going skiing; (10) attending sports events; and (11) gambling.
Annual Household Income	The total combined annual income of the household before taxes.
Business Trip	Any trip where the primary purpose of the trip is given as “business,” “convention/seminar,” or “combined business/pleasure.”
Census Region of Origin/Destination	Regional breakdowns as defined by the U.S. Bureau of Census:
Northeast	New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island and Vermont. Mid-Atlantic: New Jersey, New York and Pennsylvania
South	South Atlantic: Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia and West Virginia. East South Central: Alabama, Kentucky, Mississippi and Tennessee. West South Central: Arkansas, Louisiana, Oklahoma and Texas.
Midwest	East North Central: Illinois, Indiana, Michigan, Ohio and Wisconsin West North Central: Iowa, Kansas, Minnesota, Missouri, 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 is often larger than a Metropolitan Statistical Area (MSA).

Group Tour	Respondent checked “yes” for group tour (definition not given).
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 (e.g., sightseeing, sports), or personal.”
Length of Stay	The number of nights spent on entire trip.
Lifestages	Lifestage groups are based on household size and composition (e.g. number of members, marital status, presence of children), age of household head, and employment of household head.
<i>Young Singles:</i>	1 Member Household Age of Head Under 35
<i>Middle Singles:</i>	1 Member Household Age of Head from 35 to 65
<i>Older Singles:</i>	1 Member Household Age of Head over 65
<i>Young Couple:</i>	Multi member Household Age of Head Under 45 Married or Non-related Individual(s) of opposite sex 18+ present No children present
<i>Working Older Couple:</i>	Multi member Household 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 Older Couple:</i>	Multi member Household 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 is gathered on five lodging categories: (1) hotel/motel/b&b; (2) private home; (3) condominium/time share; (4) recreational vehicle/tent; and (5) other.
Mode of Transportation	Each trip is classified according to the respondent's answer to the question, "Primary and secondary transportation (mode)." See air mode and auto mode.
Nights Away from home	The number of nights spent away from home on one trip, including nights spent at the destination and en route. It is possible for a trip not to involve an overnight stay if the traveler took 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 is counted each time one or more members of a household travel 50 miles or more, one-way, away from home or spends one or more overnights and returns.)
Pleasure Trip	Any trip where the primary purpose of the trip is given as "visit friends or relatives, outdoor recreation, or entertainment (e.g., sightseeing, sports)."
Purpose of Trip	Each trip is classified according to the respondent's answer to the questions "primary and secondary purpose" with these categories: (1) visit friends or relatives, (2) outdoor recreation, (3) entertainment (e.g., sightseeing, sports), (4) combined business/pleasure, (5) convention/seminar, (6) business, (7) personal, (8) other.
Trip	A household trip. The term "household trips" counts multiple trips taken by U.S. households in a year. To qualify, a "household trip" must be 50 miles or more, one-way, away from home or include one or more overnights. Respondents are instructed to not include trips commuting to/from work or school or trips taken as a flight attendant or vehicle operator.

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.

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

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.

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.

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.

Greenbelt Families: Young, middle-class town families.

Kids & Cul-de-sacs: Upscale, white-collar professional suburban families.

Mid-City Mix 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

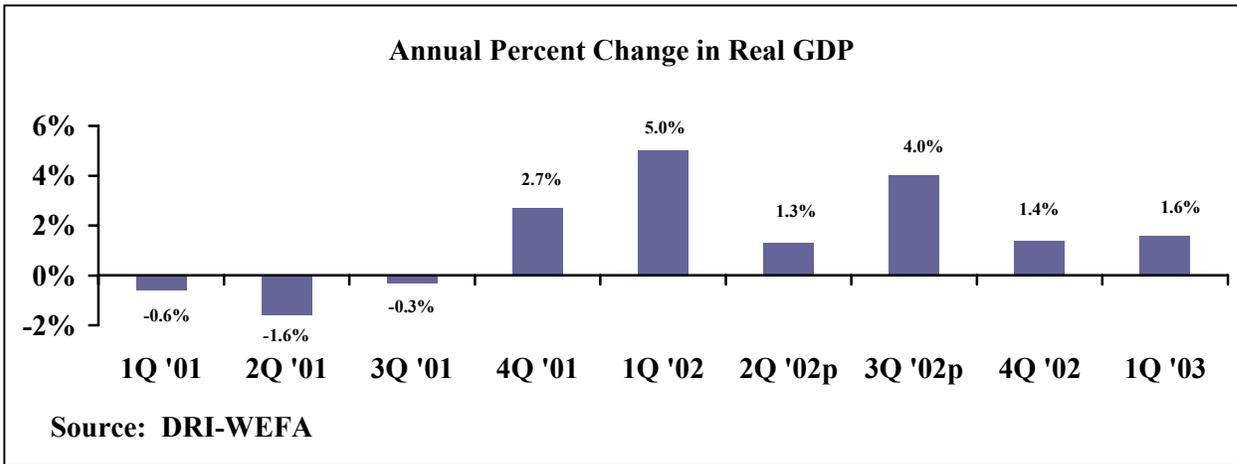
Middle America: Midscale families in mid-size towns.

<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>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>Upward Bound:</i>	Young upscale white-collar families.
<i>Winner's Circle:</i>	"New money" families living in major metropolitan suburbs. Well educated professionals.

ECONOMIC/TRAVEL INDICATORS

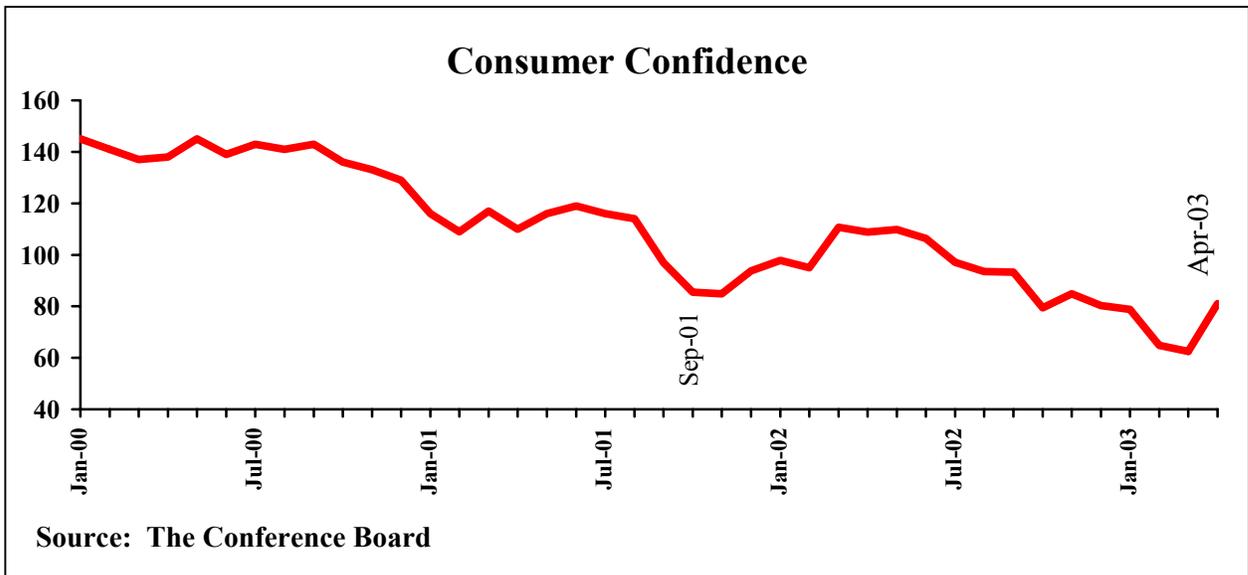
The Economy

Though the U.S. Economy experienced a recession in the last half of 2001, there were some encouraging signs in early 2002. However, the rate of growth subsequently slowed and real GDP increased just 2.4 percent for the year.



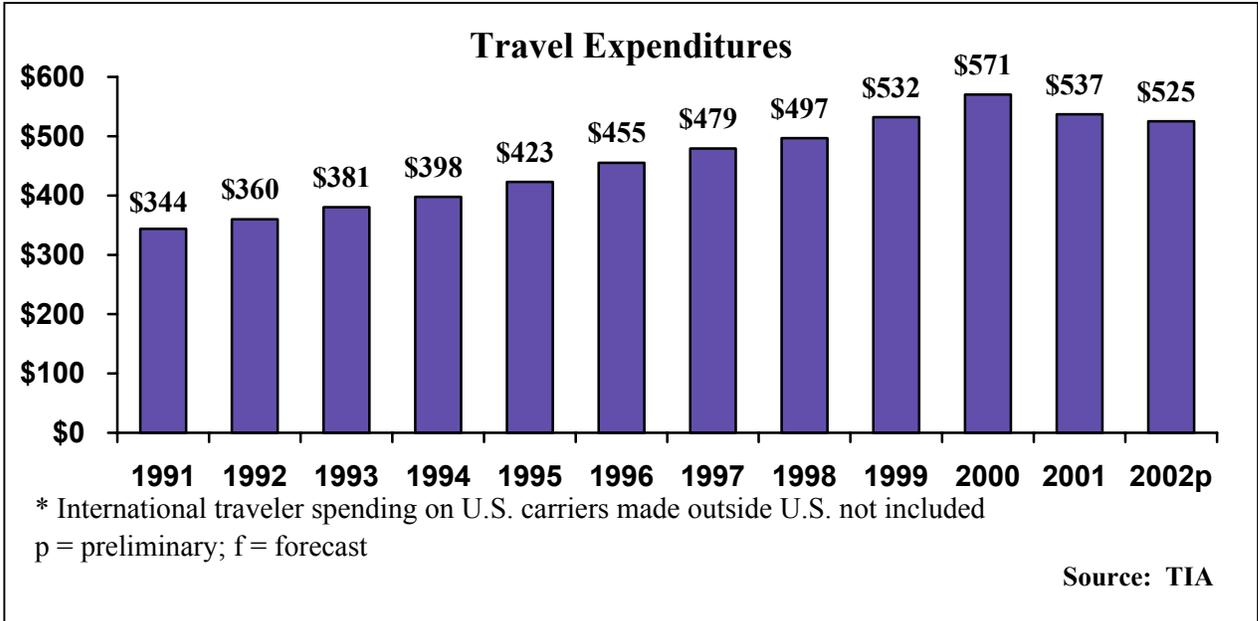
Consumer Confidence

The Conference Board's consumer confidence index climbed early in 2002 and remained strong through the middle of the year. Concerns about war in Iraq eroded confidence later in the year, with the confidence index ending at 80.3 in December.



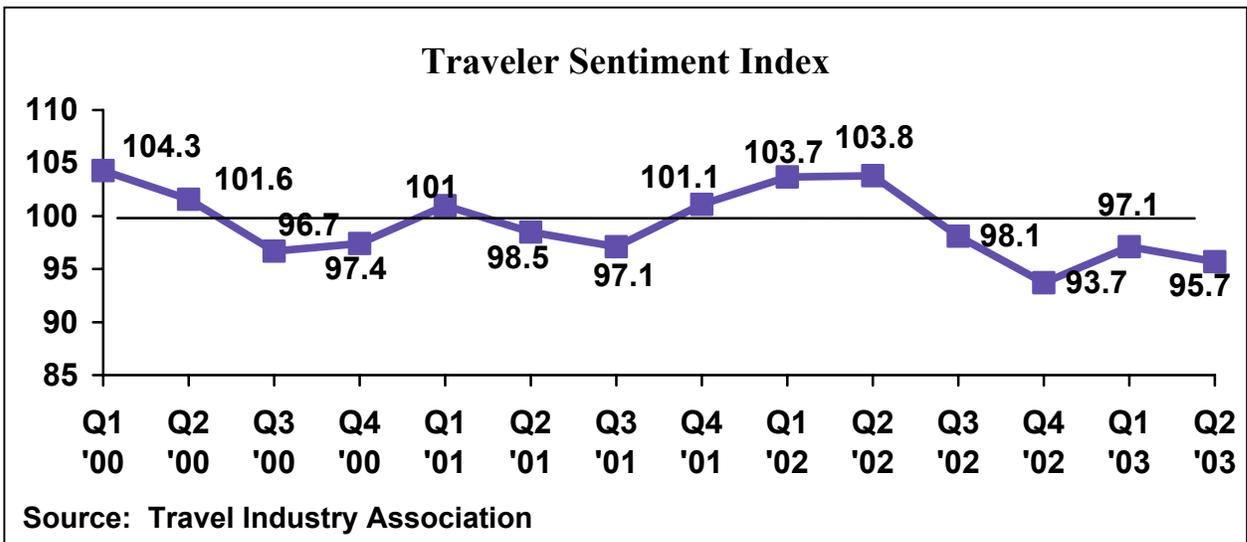
Travel Expenditures

Both domestic and international travel expenditures* declined for the second consecutive year in 2002. Total domestic and international expenditures were down by 2.2 percent in 2002.



Traveler Sentiment Index

Traveler sentiment began strong in 2002, before declining in the 3rd and 4th quarters.



BRAND DEVELOPMENT INDEX

The Brand 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, Biloxi-Gulfport households make up 0.13 percent of U.S. households, yet they take 1.8 percent of domestic household trips to Louisiana, creating a brand development index of 1388. 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 1999-2002. For a more complete chart, please see Appendix E.

1999-2002 DMA Brand Development Index for Louisiana					
City (DMA) of origin	Population (000)	Percent population	Total Avg. Visitors (000)	1999- 2002 Percent visitors	INDEX
BILOXI-GULFPORT, MS	357,344	0.13%	282,216	1.76%	1,388
BEAUMONT-PORT ARTHUR, TX	459,864	0.16%	357,874	2.24%	1,368
TYLER-LONGVIEW ET AL, TX	652,288	0.23%	430,730	2.69%	1,161
HATTIESBURG-LAUREL, MS	274,864	0.10%	148,914	0.93%	952
JACKSON, MS	886,622	0.32%	367,081	2.29%	728
HOUSTON, TX	5,081,022	1.81%	1,867,028	11.66%	646
VICTORIA, TX	84,820	0.03%	24,419	0.15%	506
MOBILE ET AL, AL-FL	1,271,914	0.45%	354,671	2.22%	490
DALLAS-FT. WORTH, TX	5,862,236	2.08%	1,469,925	9.18%	441
ABILENE-SWEETWATER, TX	304,938	0.11%	68,853	0.43%	397
MERIDIAN, MS	188,387	0.07%	40,431	0.25%	377
AUSTIN, TX	1,382,716	0.49%	266,604	1.67%	339
WACO-TEMPLE-BRYAN, TX	843,363	0.30%	159,322	1.00%	332
LITTLE ROCK ET AL, AR	1,350,611	0.48%	244,987	1.53%	319
COLUMBUS ET AL, MS	491,071	0.17%	88,067	0.55%	315
PANAMA CITY, FL	323,592	0.11%	55,242	0.35%	300
GREENWOOD-GREENVILLE, MS	238,859	0.08%	38,830	0.24%	286
SAN ANTONIO, TX	2,053,965	0.73%	312,639	1.95%	268
CORPUS CHRISTI, TX	557,122	0.20%	69,253	0.43%	218
MONTGOMERY (SELMA), AL	635,796	0.23%	72,856	0.46%	201
BIRMINGHAM ET AL, AL	1,764,914	0.63%	182,540	1.14%	182
SAN ANGELO, TX	141,669	0.05%	12,810	0.08%	159
JACKSON, TN	174,104	0.06%	14,411	0.09%	145
MEMPHIS, TN	1,798,124	0.64%	145,711	0.91%	142
WICHITA FLS ET AL, TX-OK	411,320	0.15%	31,224	0.20%	133
OKLAHOMA CITY, OK	1,631,039	0.58%	107,682	0.67%	116
FT. SMITH ET AL, AR	642,852	0.23%	40,031	0.25%	109
HUNTSVILLE ET AL, AL	919,821	0.33%	56,843	0.36%	109
AMARILLO, TX	517,642	0.18%	30,423	0.19%	103
ATLANTA, GA	5,233,332	1.86%	302,231	1.89%	102
GAINESVILLE, FL	284,652	0.10%	16,413	0.10%	101

1999-2002 DMA Brand Development Index for Louisiana					
City (DMA) of origin	Population (000)	Percent population	Total Avg. Visitors (000)	1999-2002 Percent visitors	INDEX
COLUMBUS, GA	540,061	0.19%	28,422	0.18%	92
COLUMBIA ET AL, MO	429,628	0.15%	22,417	0.14%	92
TALLAHASSEE ET AL, FL-GA	649,629	0.23%	31,624	0.20%	86
NASHVILLE, TN	2,259,661	0.80%	102,478	0.64%	80
ORLANDO ET AL, FL	2,977,826	1.06%	134,903	0.84%	80
HARLINGEN ET AL, TX	999,142	0.36%	45,235	0.28%	80
LUBBOCK, TX	409,879	0.15%	18,414	0.12%	79
TAMPA ET AL, FL	3,744,433	1.33%	157,320	0.98%	74
GREENSBORO ET AL, NC	1,596,229	0.57%	64,449	0.40%	71
ST. LOUIS, MO	3,009,811	1.07%	121,293	0.76%	71
CHATTANOOGA, TN	867,996	0.31%	34,827	0.22%	71
ODESSA-MIDLAND, TX	410,308	0.15%	16,012	0.10%	69
TULSA, OK	1,290,826	0.46%	48,837	0.31%	66
BEND, OR	118,398	0.04%	4,403	0.03%	65
JACKSONVILLE, FL	1,495,767	0.53%	50,038	0.31%	59
BOWLING GREEN, KY	209,242	0.07%	6,805	0.04%	57
MACON, GA	600,827	0.21%	18,814	0.12%	55
FT. MYERS-NAPLES, FL	932,211	0.33%	28,422	0.18%	54
GREENVILLE ET AL, SC-NC	1,969,559	0.70%	60,046	0.38%	54

CITY VOLUME ESTIMATES

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

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

2002 Non-resident Visitor Volume Estimates for Louisiana Cities

City	Volume		Estimated Additional Volume **	Adjusted City Volume
	Percent*	Count		
New Orleans	44.8%	5,455,000	562,000	6,017,000
Shreveport-Bossier City	14.3%	1,739,000	179,000	1,918,000
Baton Rouge	7.0%	856,000	88,000	944,000
Lafayette	4.9%	600,000	62,000	662,000
Lake Charles	8.3%	1,009,000	104,000	1,113,000
Monroe	2.2%	265,000	27,000	292,000
Alexandria	1.5%	178,000	18,000	196,000

* Percent of the 12,174,000 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 (1,255,000) and were not pass thru.

2002 Resident Visitor Volume Estimates for Louisiana Cities

City	Volume		Estimated Additional Volume **	Adjusted City Volume
	Percent*	Count		
New Orleans	20.3%	929,000	155,000	1,084,000
Shreveport-Bossier City	7.2%	327,000	55,000	382,000
Baton Rouge	14.2%	647,000	108,000	755,000
Lafayette	7.9%	363,000	61,000	424,000
Lake Charles	4.0%	184,000	31,000	215,000
Monroe	4.7%	215,000	36,000	251,000
Alexandria	4.0%	183,000	31,000	214,000

* Percent of the 4,570,000 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 (763,000) 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, Scrub Pine Flats households take 1.2 percent of all U.S. household trips, yet they take 3.3 percent of non-resident household trips to Louisiana, creating a brand development index of 276. 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.

2002 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
Scrub Pine Flats	6,617	1.2%	288	3.3%	276
Southside City	5,577	1.0%	197	2.2%	224
Norma Rae-ville	5,947	1.1%	186	2.1%	199
Smalltown Downtown	8,425	1.5%	238	2.7%	179
Blue Blood Estates	7,644	1.4%	193	2.2%	160
Country Squires	12,583	2.3%	316	3.6%	159
Greenbelt Families	11,498	2.1%	272	3.1%	150
Middle America	14,687	2.6%	331	3.8%	143
Mid-City Mix	3,512	0.6%	79	0.9%	143
Boomers & Babies	7,557	1.4%	158	1.8%	133
Second City Elite	13,421	2.4%	279	3.2%	132
Family Scramble	5,905	1.1%	116	1.3%	125
Mobility Blues	6,775	1.2%	132	1.5%	124
Upward Bound	13,709	2.5%	262	3.0%	121
Kids & Cul-de-Sacs	22,706	4.1%	430	4.9%	120
Blue Highways	11,896	2.1%	222	2.5%	118
Bohemian Mix	6,330	1.1%	115	1.3%	116
Young Influentials	7,248	1.3%	127	1.4%	111
God's Country	23,567	4.2%	407	4.6%	110
Boomtown Singles	4,320	0.8%	73	0.8%	107
Middleburg Managers	12,883	2.3%	217	2.5%	107
River City, USA	11,780	2.1%	195	2.2%	105
Executive Suites	9,435	1.7%	153	1.7%	103
Gray Collars	9,092	1.6%	142	1.6%	99
New Eco-topia	6,134	1.1%	95	1.1%	99
Towns & Gowns	6,712	1.2%	100	1.1%	95
Big Fish, Small Pond	11,313	2.0%	167	1.9%	94
Grain Belt	12,033	2.2%	178	2.0%	94
Inner Cities	3,922	0.7%	58	0.7%	93

2002 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	8,199	1.5%	120	1.4%	93
Pools & Patios	12,974	2.3%	189	2.1%	93
Young Literati	4,791	0.9%	70	0.8%	92
Single City Blues	5,819	1.0%	83	0.9%	90
Red, White & Blues	10,177	1.8%	141	1.6%	88
Starter Families	7,647	1.4%	105	1.2%	88
Big Sky Families	9,773	1.7%	133	1.5%	87
Rural Industrial	9,170	1.6%	120	1.4%	83
Hispanic Mix	2,308	0.4%	30	0.3%	83
Money & Brains	6,854	1.2%	88	1.0%	81
Back Country Folks	9,620	1.7%	123	1.4%	81
Hometown Retired	5,134	0.9%	65	0.7%	80
Blue-Chip Blues	10,853	1.9%	136	1.5%	80
New Beginnings	4,567	0.8%	94	1.1%	79
Winner's Circle	18,872	3.4%	234	2.7%	79
Shotguns & Pickups	9,739	1.7%	118	1.3%	77
Mines & Mills	9,608	1.7%	111	1.3%	73
Gray Power	11,537	2.1%	132	1.5%	72
Military Quarters	2,307	0.4%	26	0.3%	71
New Homesteaders	12,208	2.2%	133	1.5%	69
American Dreams	7,527	1.3%	80	0.9%	68
Golden Ponds	11,238	2.0%	111	1.3%	62
Agri-Business	8,735	1.6%	82	0.9%	60
Big City Blend	5,264	0.9%	49	0.6%	60
Urban Achievers	7,504	1.3%	62	0.7%	53
Sunset City Blues	10,203	1.8%	84	1.0%	52
Rustic Elders	11,803	2.1%	90	1.0%	49
Upstarts & Seniors	7,166	1.3%	55	0.6%	48
Suburban Sprawl	6,512	1.2%	49	0.6%	48
New Empty Nests	15,345	2.7%	112	1.3%	47
Old Yankee Rows	4,472	0.8%	28	0.3%	40
Urban Gold Coast	2,125	0.4%	12	0.1%	34
Latino America	2,918	0.5%	11	0.1%	23

* Percentages are rounded to one decimal place.