



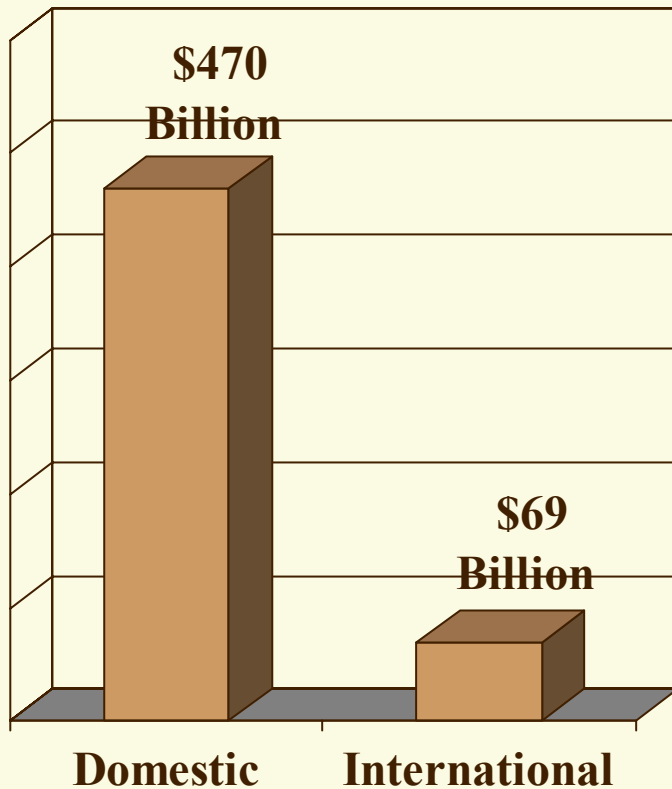
Overview of International Visitation to Louisiana

A Presentation For the Louisiana
Travel Summit
January 14, 2004

Presentation Objectives

- ✓ Illustrate The Big Picture of International Visitation to U.S. and Louisiana
- ✓ Provide Some Insights Into Louisiana's Top International Markets
- ✓ Briefly Profile Visitors From The Top 3 Overseas Countries and Mexico
- ✓ Provide Insight For The Future

The Impact of International Visitors to The U.S.



- ✓ In 2002 41.9 million international visitors came to the U.S.
- ✓ International visitor spending in U.S. represents 12.8% of all visitor spending

The Impact of International Visitors on Louisiana

- ✓ Louisiana greets 400,000 to 500,000 overseas and Mexican visitors annually
- ✓ Over \$500 million is spent annually in Louisiana by overseas and Mexican visitors
- ✓ International visitor spending represents 6% of all visitor spending in Louisiana
- ✓ International visitors typically spend more time and money **per trip** to a destination

Information Sources

- ✓ Office of Travel and Tourism Industries within the U.S. Department of Commerce
- ✓ Statistics Canada, Government of Canada
- ✓ Travel Industry Association of America
- ✓ Louisiana Tax Free Shopping Program
- ✓ Louisiana Office of Tourism

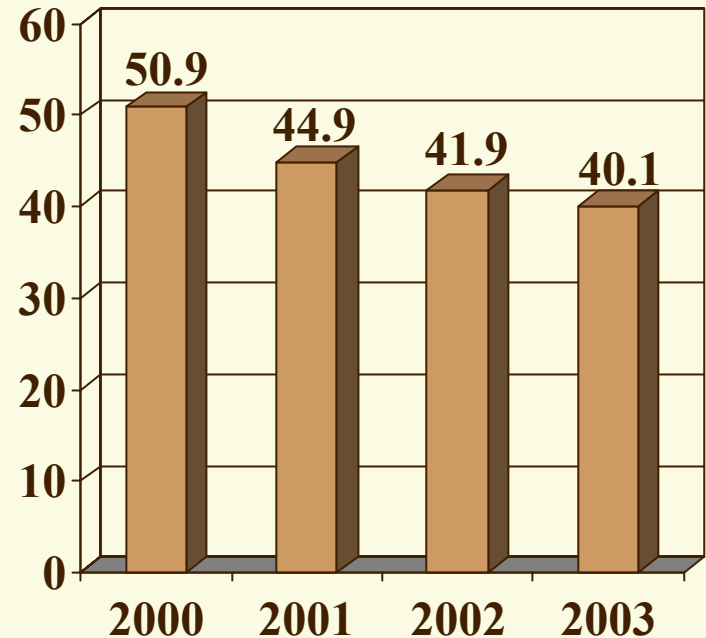
Overseas Visitor Market Share

NY	23.5%	GA	3.1%
FL	23.1%	AZ	2.9%
CA	21.2%	CO	2.0%
HI	10.2%	MI	1.9%
NV	6.7%	WA	1.9%
IL	5.6%	OH	1.7%
MA	4.9%	NC	1.6%
TX	4.3%	UT	1.5%
NJ	3.7%	VA	1.5%
PA	3.5%	LA	1.4%

U.S. Trends Since 9/11

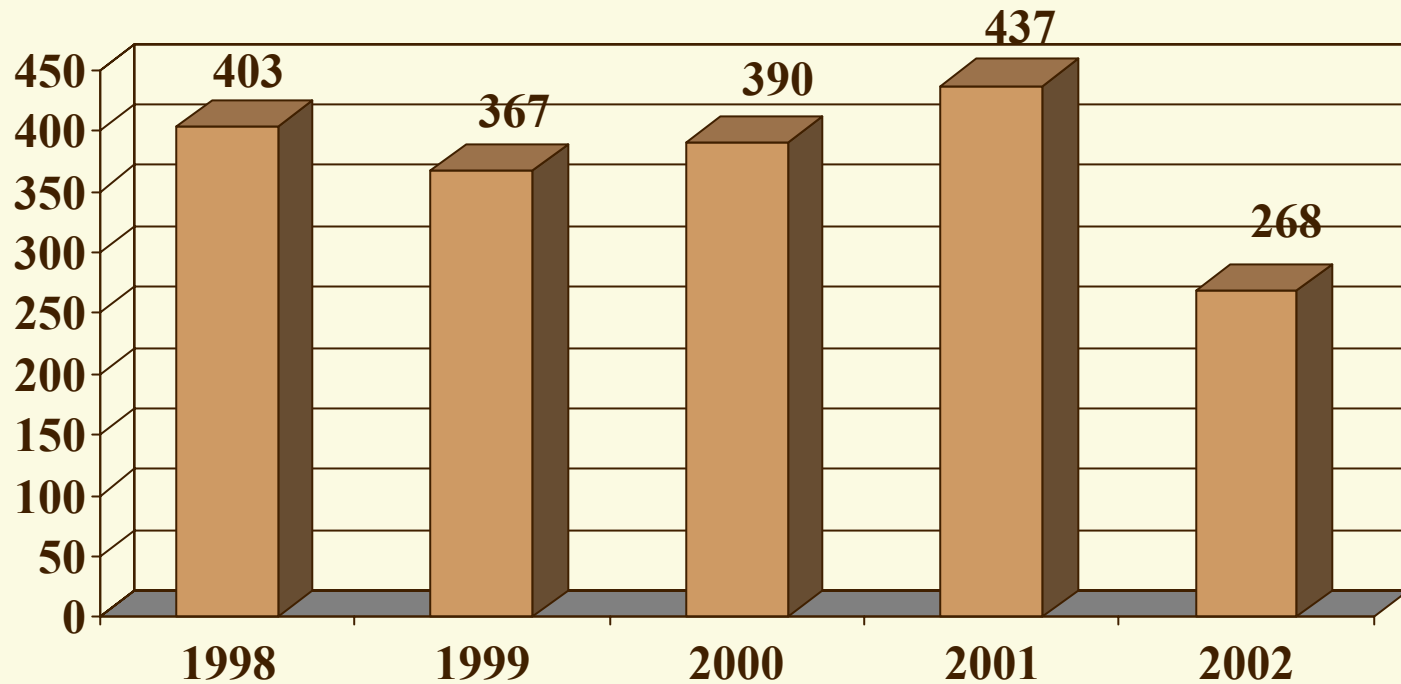
- ✓ International visitors to U.S. down 21% in 4 years.
- ✓ U.S. market share down 30%
- ✓ Decline in international arrivals cost U.S. travel industry \$154 billion

Millions of Visitors



Overseas Visitors To Louisiana

Thousands of Visitors



Major Overseas Markets For Louisiana

Country	% of Total Overseas Visitors to La.	% of All Tax-Free Shopping Transactions
United Kingdom	19.7%	9.2%
Germany	7.5%	5.3%
France	7.1%	6.7%
Australia	5.0%	1.9%
Italy	4.8%	2.1%
Brazil	2.7%	3.9%
Japan	1.8%	2.8%

United Kingdom Visitor Profile

- ✓ 70,000 Average annual volume to La.
- ✓ 2.5 Average party size
- ✓ 7.6 Average nights in La.
- ✓ \$300 Average spending per day
- ✓ 40.4 Average age
- ✓ 67% Used a travel agent on trip
- ✓ 15% Participated in a group tour
- ✓ 75% Stayed in hotel/motel

German Visitor Profile

- ✓ 61,000 Average annual volume to La.
- ✓ 2.4 Average party size
- ✓ 5.6 Average nights in La.
- ✓ \$279 Average spending per day
- ✓ 41.3 Average age
- ✓ 71% Used a travel agent on trip
- ✓ 12% Participated in a group tour
- ✓ 86% Stayed in hotel/motel

French Visitor Profile

- ✓ 37,000 Average annual volume to La.
- ✓ 3.0 Average party size
- ✓ 8.0 Average nights in La.
- ✓ \$293 Average spending per day
- ✓ 39.2 Average age
- ✓ 59% Used a travel agent on trip
- ✓ 21% Participated in a group tour
- ✓ 72% Stayed in hotel/motel

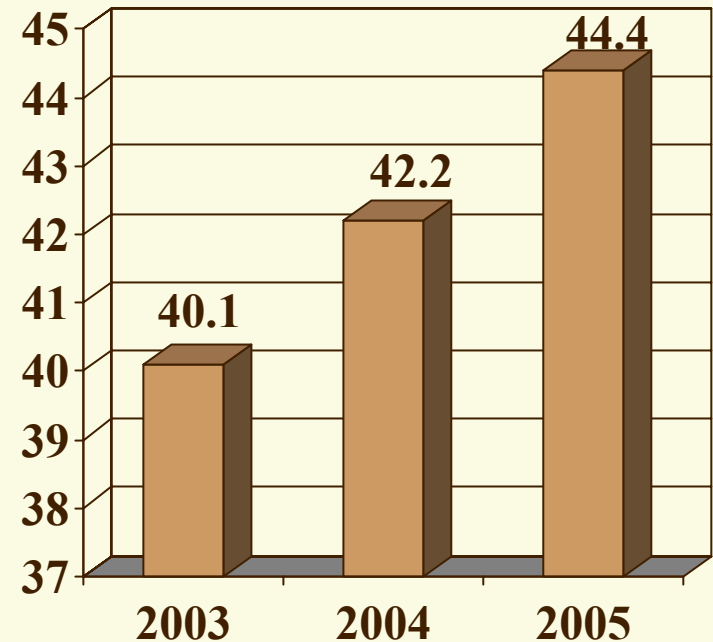
Mexican Visitor Profile

- ✓ 10-30,000 Average annual volume
- ✓ 3.0 Average party size
- ✓ 6.3 Average nights in La.
- ✓ \$348 Average spending per day
- ✓ 39.1 Average age
- ✓ 68% Used a travel agent on trip
- ✓ 21% Participated in a group tour
- ✓ 67% Stayed in hotel/motel

Outlook For International Travel to U.S.

- ✓ Total arrivals down 4% in 2003 but up 5% in 2004 and 2005
- ✓ European markets strong in 2003 and even stronger in 2004
- ✓ \$50 million DOC promotional program to make a difference

Millions of Visitors



Outlook For International Travel to U.S.

- ✓ New government policies discouraging travel to U.S.
- ✓ Terrorist threats expected to continue
- ✓ SARS
- ✓ Iraq/U.S. war recovery
- ✓ Territorial conflicts

Expectations For Louisiana

✓ Visitors to La. will increase if:

- Visitor conditions to enter U.S. improve
- La. sustains or improves its level of international promotion
- Direct flights ease access

✓ Visitors to La. will decline if:

- Current U.S. conditions remain
- La. reduces promotions within primary international markets
- Economic conditions decline in La. prime markets

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