

Calendar Year 2007
Louisiana TravelsAmerica
Visitor Profile Report

March 2008

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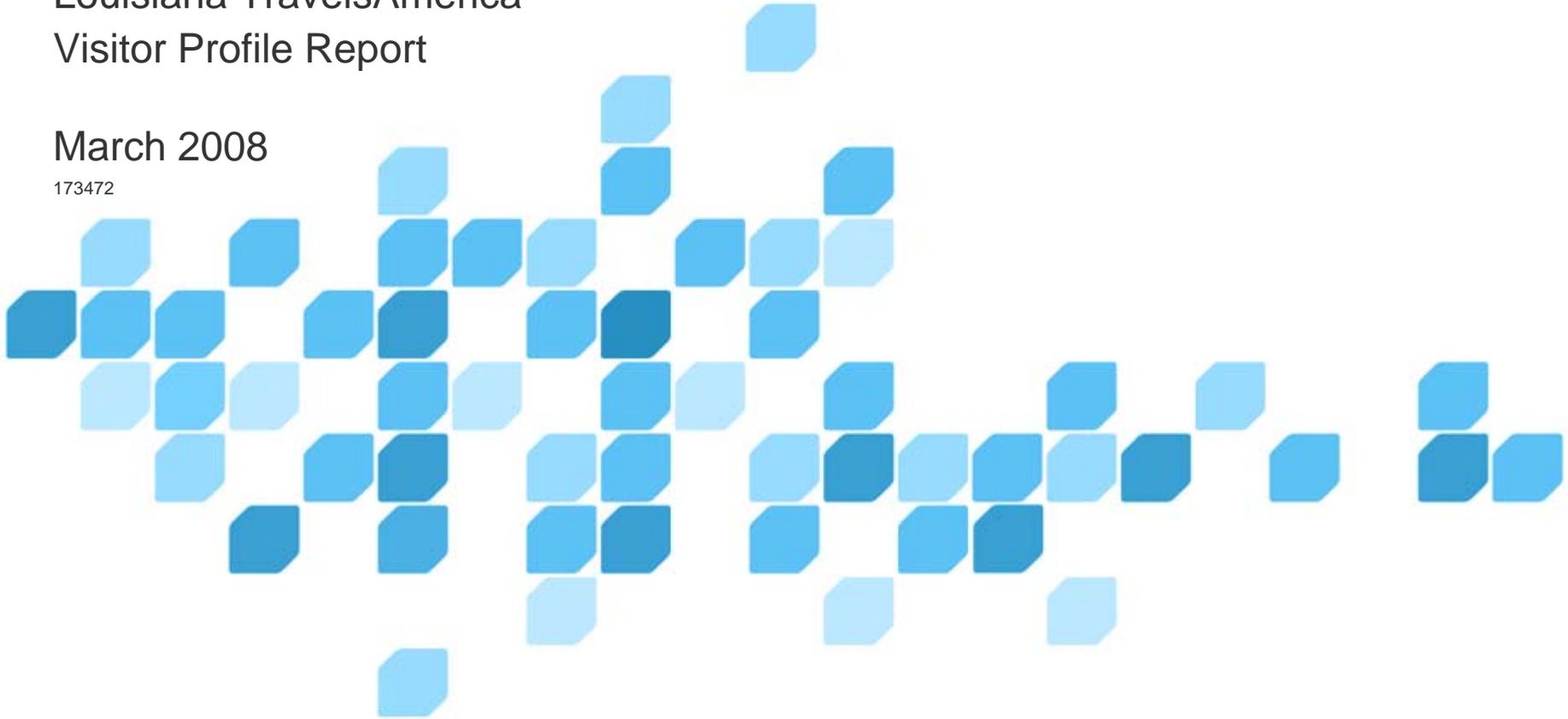


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Introduction and Purposes of the Research

TNS is pleased to present the first TravelsAmerica report for the Louisiana Office of Tourism. TNS conducts this online (data collection) project continuously throughout the year as a nationwide syndication. The results enable the assessment of visitor volumes and development of profiles of leisure visitors to the state.

As a tracking study, TNS and the Louisiana Office of Tourism constantly strive to improve the research. This report assesses the total volume of visitors to Louisiana plus those arriving from three key areas. The profile of Louisiana's visitors encompasses:

- **Volume and source of visitors**
- **Basic demographics** such as age, number of children in household, household income
- **Trip characteristics** such as day vs. overnight, business travel, travel expenditures, length of stay, activities selected, travel timing (quarter), mode of transportation
- **Visitor residence** by state and DMA
- **Specific segments** of visitors:
 - In-state residents
 - High BDI Marketing Area residents (Above average number of visitors from DMA; see appendix)
 - Residents living elsewhere (neither in-state nor in the High BDI Marketing Area)
 - African-Americans
 - Hispanics
 - Mature visitors (defined as those 55+).
- **Satisfaction** with Louisiana as a destination
- **An Export/Import assessment** of spending by Louisiana residents traveling elsewhere vs. non-Louisiana residents visiting Louisiana
- **Competitive destination** comparisons to Louisiana.

The report continues with the Executive Summary followed by the Results of the Research section, which includes detailed tables and graphics of findings. The appendix contains a description of the Business Development Index by DMA, the research methods, and a glossary of terms.

Executive Summary/ Implications

Background

Derived from the TNS TravelsAmerica syndication, this first annual report prepared for Louisiana Office of Tourism for Calendar Year 2007 (January 1, 2007 through December 31, 2007) addresses:

- **The total Louisiana market and these subgroups:**
 - Louisiana residents
 - The High BDI Marketing Area
 - Those who reside elsewhere (neither Louisiana nor the High BDI Marketing Area)
- Volume of visitors and top Louisiana cities visited
- Volume of visitors by quarter
- Relevance of key segments and impact of the African-American market
- Source of visitors
- Louisiana visitor profile, including special segments: African-American, Hispanic, and Mature markets
- The Louisiana trip (purpose, stay length, companions, mode, timing, planning, activities, spending, and satisfaction)
- Competitive states – how they compare to Louisiana
- Tourism export/import “balance of trade” assessment.

Abstract

Nationwide travel declines, but Louisiana visitation declines even more precipitously. It is likely that the 2005 hurricane season continues to impact Louisiana – with media still referencing the US Army Corps of Engineers storm protection for New Orleans. Efforts to increase tourism require even more emphasis on addressing and countering those images.

Although visitors report strong satisfaction with their Louisiana visit (especially in-state and High BDI Marketing Area residents), interest in visiting Louisiana lags nearby competitors. Even in-state residents are more likely to have visited Texas in the past three years than Louisiana. For future plans (next two years), Louisiana trails Texas and Florida, regardless of residence. Other southern areas represent Louisiana’s primary competition – whether viewed from either the state or the city level – led by Texas and Florida and cities within those states.

Of the special demographic markets, African-Americans represent a large ethnic group, but will contribute less to the hospitality industry than others (often staying with friends/relatives). The Mature market is larger and more profitable.

Executive Summary/ Implications

Importance of Tourism to Louisiana

Several measures underscore the importance of tourism to Louisiana:

- **Volume of Visitors.** Despite declining volumes, Louisiana still draws nearly 20 million visitors (19.5). Among nearby states, Louisiana out-pulls Arkansas (17.8) and Mississippi (17.0), but lags Alabama (22.6) and, of course, Texas (75.6 million visitors). The level of visitation suggests that tourism provides considerable direct (taxes) and indirect (employment) revenue benefit to Louisiana.
- **Overnight Volume.** Similar to the national average (70%), two-thirds (67%) of Louisiana visitors spend the night. Those who stay average three nights each, similar to other nearby states (although it lags Florida's 4.6 nights).
- **Travel Spending in Louisiana (excluding transportation).** So . . . what is a traveler worth to the state? Louisiana leads most key competitive states in average visitor spending (\$412 vs. \$387 Tennessee, \$356 Mississippi, \$329 Georgia, \$307 Texas). The only key competitor that generates greater spending is Florida (\$752).
- **Balance of Trade.** The volume and spending level for Louisiana enables it to show a "surplus." Exports (travel dollars coming into Louisiana from non-residents) substantially exceed imports (Louisiana residents who spend travel dollars outside Louisiana). In addition, many domestic travel dollars remain in the state (Louisiana residents traveling locally). Exports = 57%; Imports = 35%; Domestic = 9%.
- **Source of Visitors.** As suggested by the "Balance of Trade," other states provide much of Louisiana's tourism (58% arrive from out of state; 36% from the High BDI Marketing Area and 21% from elsewhere).
- **Trip Purpose.** Most (75%) visitors to Louisiana are tourists (not business travelers). Travelers go to Louisiana for the same basic reasons that they travel elsewhere (42% visit friends/relatives, 33% entertainment/other leisure, 14% business, 11% personal business/other).
- **Timing.** Louisiana hosts guests steadily throughout the year – it appears less seasonal than typical leisure travel, which generally peaks in the summer. In part, this occurs because in-state residents' timing is out-of-sync with out-of-state visitors. "In-staters" most often visit in the Summer and Fall, High BDI Marketing Area residents most often opt for the Spring, and out-of-area visitors choose Winter or Spring and are more likely to avoid the Summer.
- **Business Travel.** Business travel behaviors/choices differ from leisure travelers. They represent fewer trips (14% vs. 75% strictly leisure), more often fly (36% vs. 9%), stay longer (3.9 vs. 2.9 nights), more often pay (hotel/motel) for lodging (3.3 vs. 0.9 nights), and are more likely to travel alone (60% vs. 20%).

Executive Summary/ Implications

Profile: Trip and Travel Characteristics

- **Demographics: Louisiana Visitors Resemble Visitors Elsewhere, With Some Variations (LA vs. Total US):**
 - Age shows minor differences (45 vs. 46).
 - Income comparisons reveal lower incomes for Louisiana visitors (\$61,000 vs. \$68,800), although those visiting from outside the state and outside the High BDI Marketing Area more closely match (\$68,300).
 - Family composition factors show a similar proportion of males (43% vs. 44%), married partners (60% vs. 60%), and families, as measured by 3+ members (45% vs. 44%).
 - Ethnic origins indicate that roughly 2.5 times as many Louisiana visitors (19%) claim African-American heritage than in the US as a whole (8%). However, Hispanic levels match (4%).
 - Attitudes, as defined by TNS FutureView, show that Shapers/Makers (influencers) comprise about the same proportion of visitors to Louisiana as the US as a whole (32% vs. 31%).
 - Retirees represent a similar proportion (17% vs. 16%).
 - Slightly fewer are formally educated (39% vs. 42% college graduates).
 - In-State visitors differ from other visitors. They tend to be younger (42), less affluent (\$52,400), and African-American (22%); fewer are influencers (28%), retired (13%), or college graduates (34%).
- **Travel Planning Horizons Are Short, But Vary by Distance.** About half (48%) of Louisiana visitors decide to take the trip relatively spontaneously (within two weeks of departure), but the spontaneity declines by distance (and travel time): in-state (67%), High BDI Marketing Area (48%), elsewhere (31%).
- **Travelers Primarily Rely on “Offline” Information Sources.** Similar to all travelers, Louisiana visitors rely primarily on offline information resources (47% vs. 46% all US travelers), particularly their own experience (24% vs. 22%) and friends/relatives (20% vs. 19%). However, many search the Internet as well (24% vs. 26%).
- **Louisiana Visitors Book “Offline” More Often Than Others.** Overall, Louisiana visitors book offline somewhat more often than other travelers (46% vs. 41%); conversely, they book online less often (45% vs. 50%).
- **Most Visitors Drive.** Three-quarters of visitors drive to Louisiana (75% vs. 72% all US). The proportion, as expected, declines with distance: residents (90%), High BDI Marketing Area (79%), and elsewhere (51%).
- **Overnighters Spend More.** Not surprisingly, because of the additional time to see/do more things and because they incur lodging expenses (averaging 3.0 nights), overnighters spend over three times as much as day-trippers (\$614 vs. \$188). As noted earlier, Louisiana visitors spend more than visitors to nearby state (except Florida).

Executive Summary/ Implications

Diverse Characteristics Appear in Ethnic/Age Segments

Strategies to capture visitors with various interests develop as destination promoters hone their marketing messages. Three separate markets covered by this report include (comparisons shown below are the segment vs. all Louisiana visitors):

■ African-American Visitors:

- **Demographics:** Representing a sizeable group, nearly a fifth (19%) of Louisiana visitors, this group is younger (37 vs. 45), less affluent (\$53,300 vs. \$61,000), less often married (39% vs. 60% -- contributing to lower incomes), and more often (47% vs. 36%) live with children. Two-thirds (67% vs. 59%) work full-time – consistent with their youth.
- **Travel Patterns:** Most likely of the segments to visit friends and relatives (54% vs. 42%). Consequently, they represent a less profitable niche – staying overnight less often (63% vs. 67%) and less likely to pay for lodging when they do (34% vs. 43%). Their average spending (\$390 vs. \$518) places below any other segment reviewed in this report except in-state visitors (\$188).
- **Activity Choices:** African-Americans, by far, more often enjoy nightclubs/dancing (18% vs. 8%).

■ Hispanic Visitors:

- **Demographics:** the smallest segment reviewed (4% of Louisiana visitors), this group is slightly older (47 vs. 45), less affluent (\$56,300 vs. \$61,000), less often married (51% vs. 60% -- contributing to lower incomes), and more often (40% vs. 36%) live with children. Slightly more likely than others (63% vs. 59%) to work full-time.
- **Travel Patterns:** Less likely to visit friends and relatives (36% vs. 42%), but choosing entertainment (20% vs. 13%) more often than others. They represent a very profitable niche (**caution, however, because the sample is very small – 35 respondents**) that does not stay overnight quite as often (64% vs. 67%), but pays for lodging when they do (54% vs. 43%). They spend more than average (\$1,414 vs. \$518) and half (53%) is on gaming.
- **Activity Choices:** More often choose casinos/gaming (26% vs. 17%), fine dining (26% vs. 15%), urban sightseeing (20% vs. 12%), and rural sightseeing (19% vs. 11%) than other segments.

■ Mature Visitors:

- **Demographics:** Representing more than a quarter (29%) of Louisiana visitors, this group, by definition, is older (64 vs. 45), near average affluence (\$58,900 vs. \$61,000), more often married (67% vs. 60%), and seldom (8% vs. 36%) live with children. Half (51% vs. 17%) are retired.
- **Travel Patterns:** A profitable niche, the group spends above average levels on their visit (\$616 vs. \$518). They more often spend the night (71% vs. 67%), tend to stay somewhat longer (3.3 vs. 3.0 nights), and more often pay for lodging (48% vs. 43%).
- **Activity Choices:** More often gamble (21% vs. 17%) and sightsee rural areas (16% vs. 11%) than others.

Executive Summary/ Implications

Competition Fiercest In, But Not Limited To, The South

- **Southerners Stay in the South.** Proximity plays a substantial role in destination choices. The top seven destinations chosen by Louisiana visitors are all southern states (TX, FL, MS, AL, TN, GA, AR); California ranks eighth. The top six cities (DMAs) visited are also in the South; Las Vegas ranks seventh.
- **Primarily, Louisiana Visitors Venture to Other Southern States.** However, they sometimes travel farther than adjoining states – Besides Texas and Mississippi, Florida and Alabama (not adjoining) exceed Arkansas.

Louisiana Generates High Level of Satisfaction

- **Satisfaction Varies Somewhat by Proximity.** Louisiana visitors rate the state highly, with those living in-state (87% extremely/ very satisfied) assigning higher “marks” than High BDI Marketing Area (82%) or other visitors (78%). Compared to competitive states (LA, TX, GA, TN, MS, FL), Louisiana places near or below center.

Assessment

- **Louisiana Visitation Declines, But Still Draws Nearby Visitors.** The volume levels indicate a need for heightened emphasis on Louisiana as a destination. However, it still draws more visitors than Arkansas and Mississippi and its “balance of trade” shows that Louisiana draws more tourism dollars into the state than residents spend elsewhere.
- **Louisiana Visitors – Best Marketing Areas.** Visitors usually drive to Louisiana – suggesting that Louisiana residents and nearby states/DMAs offer the greatest potential for increasing tourism. Nearby visitors also have shorter planning/decision horizons and visit frequently, so marketing can be flexible in media choices – developing promotions that may see results faster than destinations which rely on more distant markets.
- **Specialty Markets Available.** Because of its sheer size, strategically targeting the African-American market may benefit Louisiana. Many currently visit friends and relatives – broadening Louisiana’s appeal to more distant African-Americans could increase their value (via paid lodging) to the state.

The Mature market (growing with the boomer influence) not only represents a sizeable market (currently more than a quarter of visitors), but one that spends above-average levels inside the state.

Results of the Research



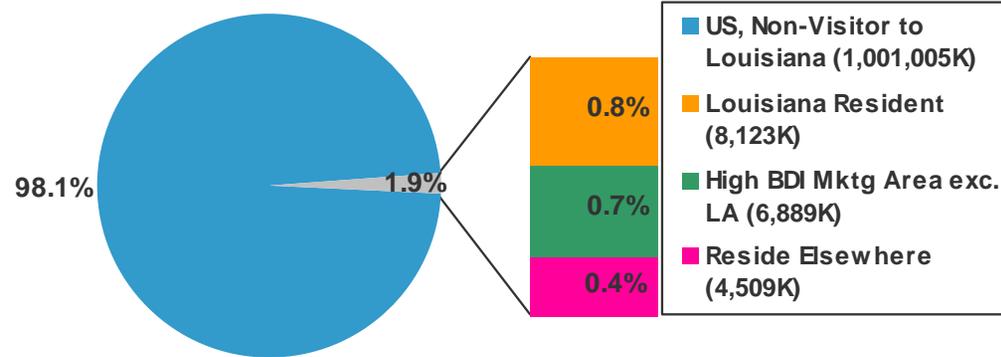
Visitor Volume and Origins

Overall Volume of Visitors to Louisiana, Person-Trips

Market Overview (Person Trips)

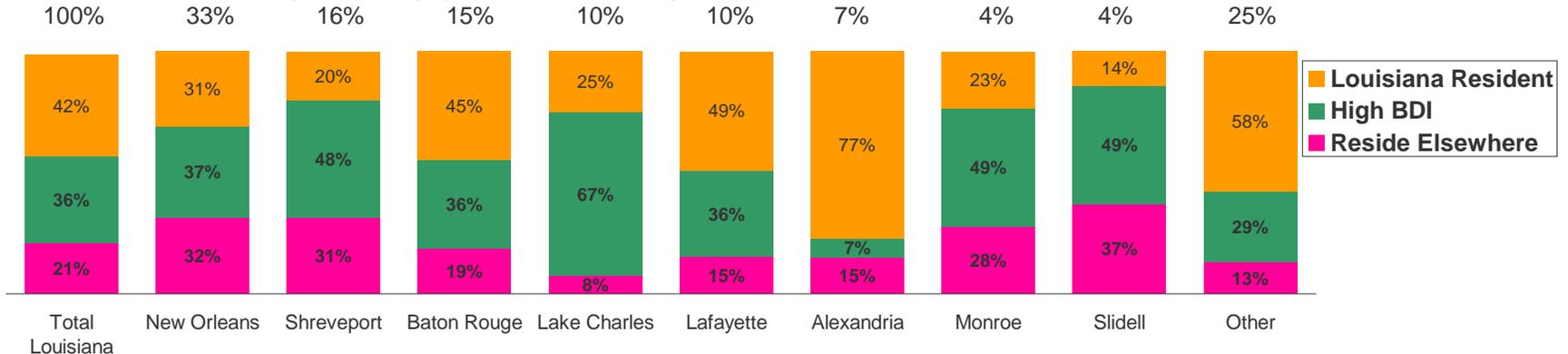
- CY 2007 person-trips visits to Louisiana (19,521,000) represent an 18 percent drop from CY 2006 (23,892,000). The trips for the total US also dropped, but less severely (8%; 1,020,526,000 from 1,103,796,000).
- Louisiana draws most visitors from those most familiar with it – in-state residents and the High BDI Marketing Area.
- However, the cities draw visitors from very different regions. For example:
 - Alexandria is quite dependent upon Louisiana residents (77% of its visitors)
 - Lake Charles relies on visitors from the High BDI Marketing Area
 - New Orleans draws from all areas.

Projected Visitation – All US Trips (1,020,526,000)



Louisiana Cities Visited by Residence
(% of All Louisiana Visitors; Multiple Cities Allowed)

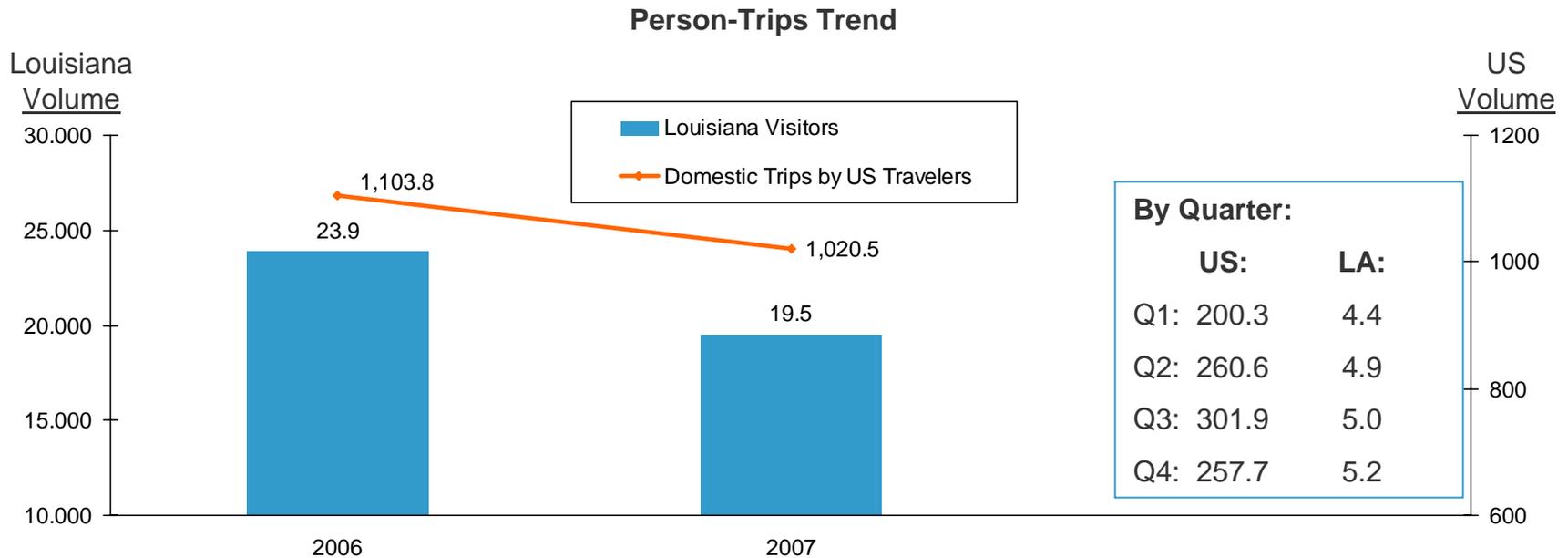
% of Total Louisiana Visitors (Person-Trips) Who Visit Each City:



Volume of Visitors Compared to US – by Quarter

Recent Trends

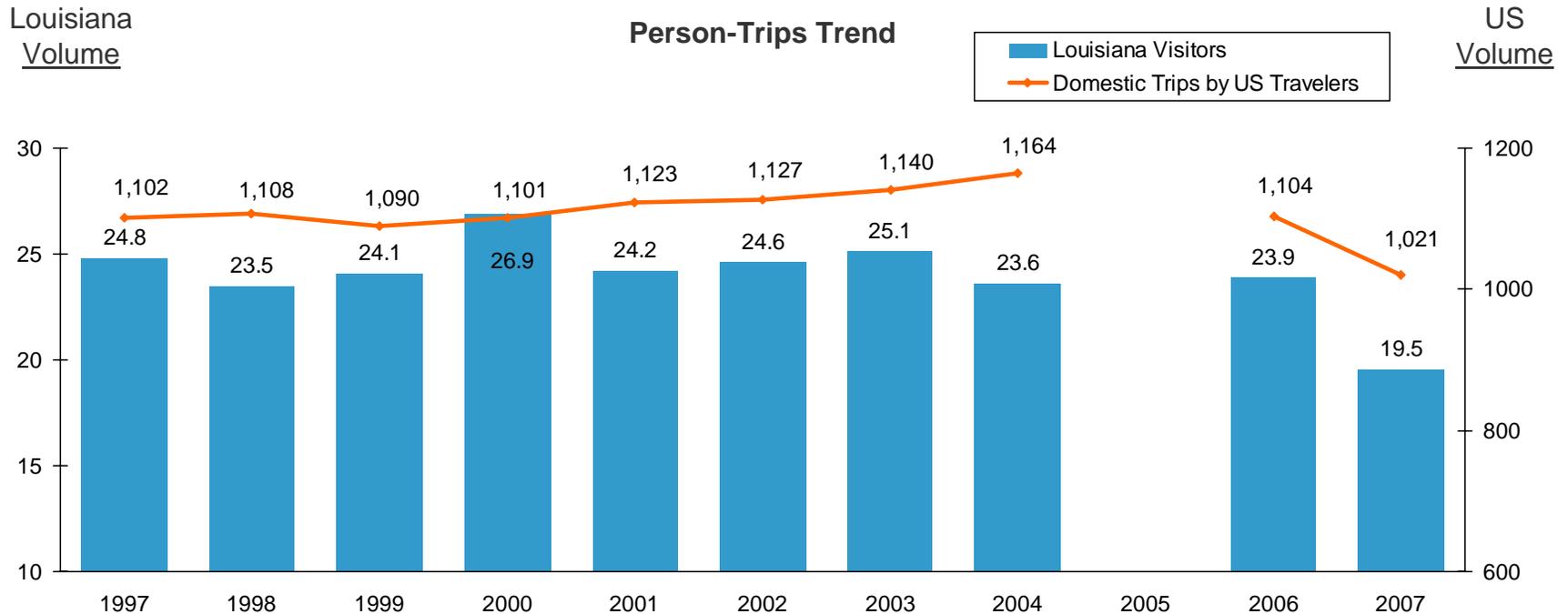
- Nearly 20 million travelers visited Louisiana in 2007, dropping 18 percent from the year before (24 million).
- As shown on the prior slide, US travel (person-trips) dropped by a lesser amount (8%), but still substantially.
- As in the past, Louisiana varies from the national norm – hosting the greatest number of visitors in the fourth rather than the third quarter.



Volume of Visitors Compared to US – Historically

Longer Trends

- Visitors to Louisiana in 2007 reach historic lows, likely a combination of the far-reaching aftermath of Hurricane Katrina (and continual, although sporadic, negative press regarding the US Corps of Engineers vis-à-vis New Orleans).



Source: 1998 – 2004 = TIA

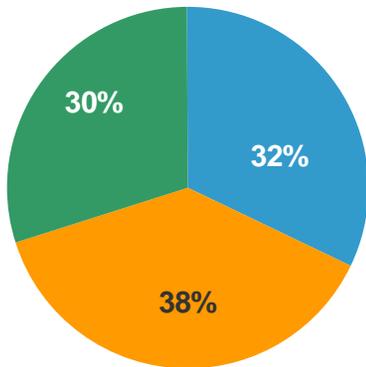
Key Segments

Market Relevance

- Out of 210 DMA areas, Louisiana hosts an above average number of visitors from 26 of those outside of Louisiana (Louisiana’s High BDI Marketing Area, shown later).
- Almost two out of five (38%) visitors arrive from the High BDI Marketing Area, another third (32%) live in Louisiana, and the remaining visitors are dispersed throughout the United States.
- By age, more than a quarter (29%) are in the “Mature” category – roughly the same as for the total US travelers (30%, not shown). Louisiana attracts somewhat more young visitors (30%) than represent US travelers (26%, not shown) and, conversely, fewer in the middle category (41% vs. 45%).
- By ethnicity, Louisiana hosts more than double the US average of African-Americans (19% vs. 8%).

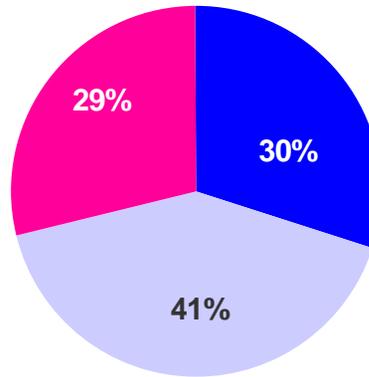
Proportion of Louisiana Visitors by Segment

By Source



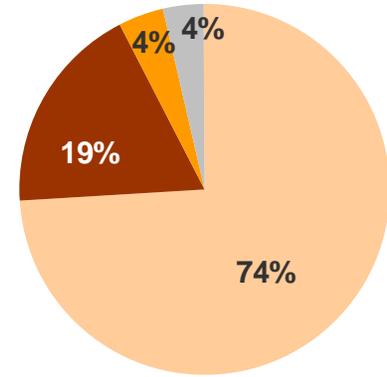
■ Louisiana ■ High BDI ■ Elsewhere

By Age (Mature = 55+)



■ Under 35 ■ 35 - 54 ■ 55+

By Ethnicity



■ White ■ AA* ■ Hispanic ■ Other

* African-American

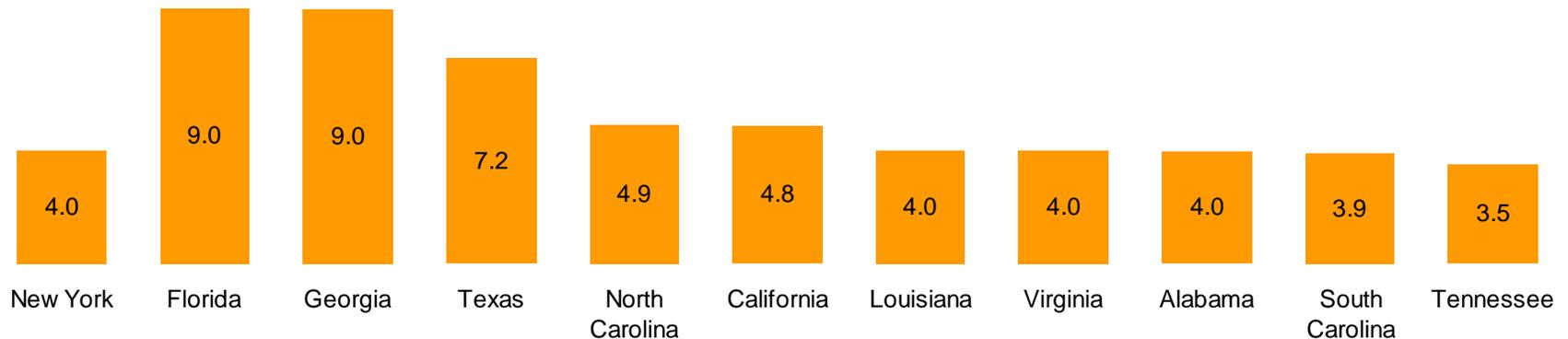
Caution: Note Small Sample (35) for Hispanics yields less reliable comparisons

African-American Travelers

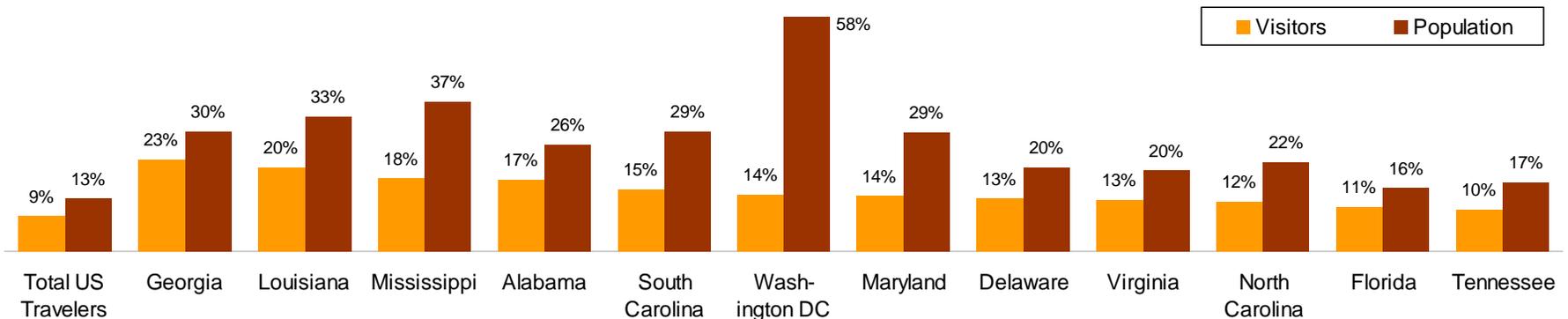
Southern states attract African-American visitors

- Florida, Georgia, and Texas, in particular, draw large numbers of African-American visitors.
- In terms of proportion of visitors, Georgia, Louisiana, and Mississippi top the list while Florida drops to 11th place. The states that have a large share of visitors who are African-American tend to have a large share of African-American residents as well.
- The data suggest that African-Americans travel less than other races – in every state, including the total US, the proportion of African-American visitors falls short of the proportion who live there.

States With the Largest Number of African-American Visitors (in millions)



States with the Largest Proportion of African-Americans: Visitors and Population

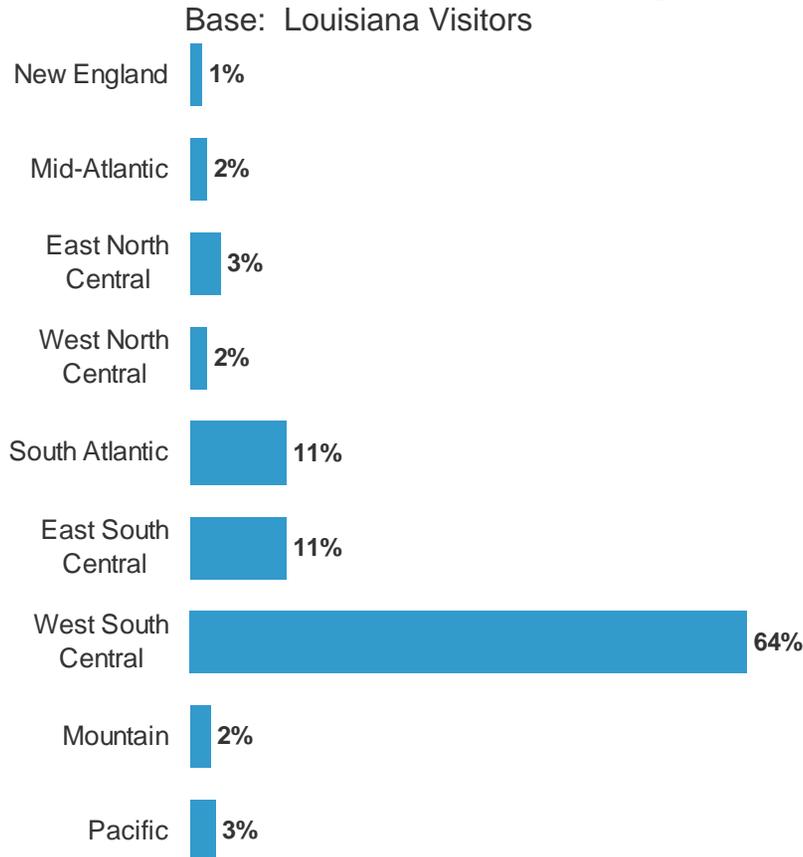


Visitor Origin: Region and State

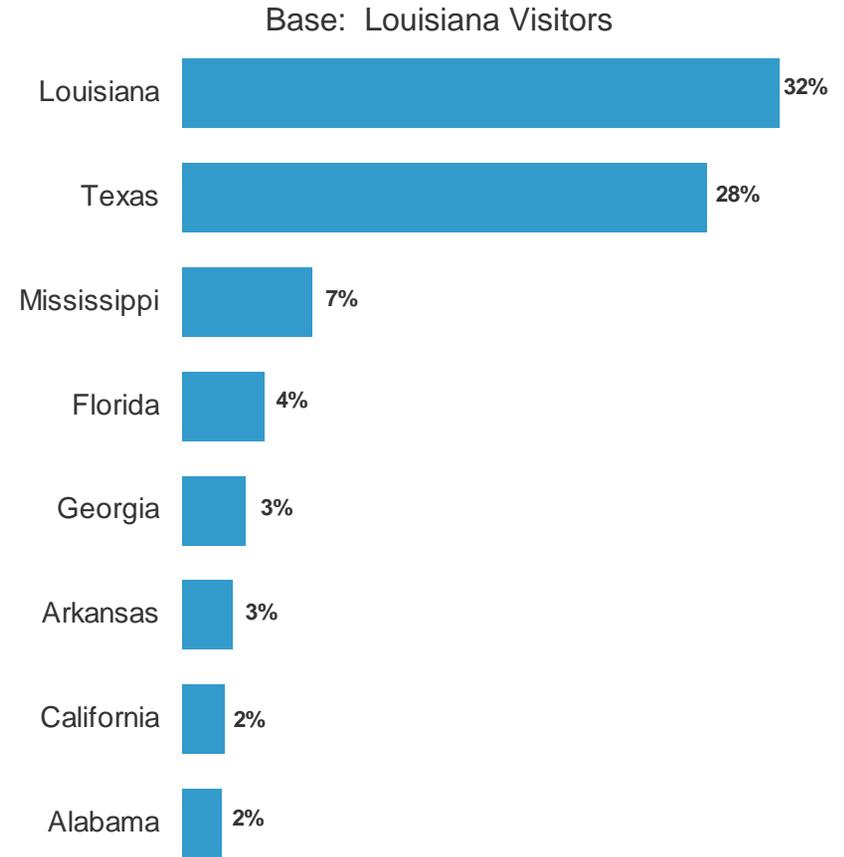
Visitor Residence

- Two-thirds of Louisiana visitors live in the West South Central census region, particularly Louisiana (32%) and Texas (28%). Arkansas (3%), also in this census region, adds a few more. The other state in this area (Oklahoma) contributes only one percent of Louisiana's visitors.
- Mississippi (7%), in the East South Central region, ranks third among Louisiana's sources.
- Florida (4%) and Georgia (3%), in the South Atlantic region, rank in the top five.

Source of Louisiana Visitors by Census Region



Source of Louisiana Visitors: Top States



Geography (Census Region State Composition)

States within regions shown – this is useful as a reference for the prior slide.

New England	Mid Atlantic	South Atlantic	East South Central	West South Central	East North Central	West North Central	Mountain	Pacific
CT	NJ	DL	AL	AR	IL	IA	AZ	CA
ME	NY	DC	KY	LA	IN	KS	CO	OR
MA	PA	FL	MS	OK	MI	MN	ID	WA
NH		GA	TN	TX	OH	MO	MT	
RI		MD			WI	NE	NV	
VT		NC				ND	NM	
		SC				SD	UT	
		VA					WY	
		WV						

Visitor Origin: Top DMAs

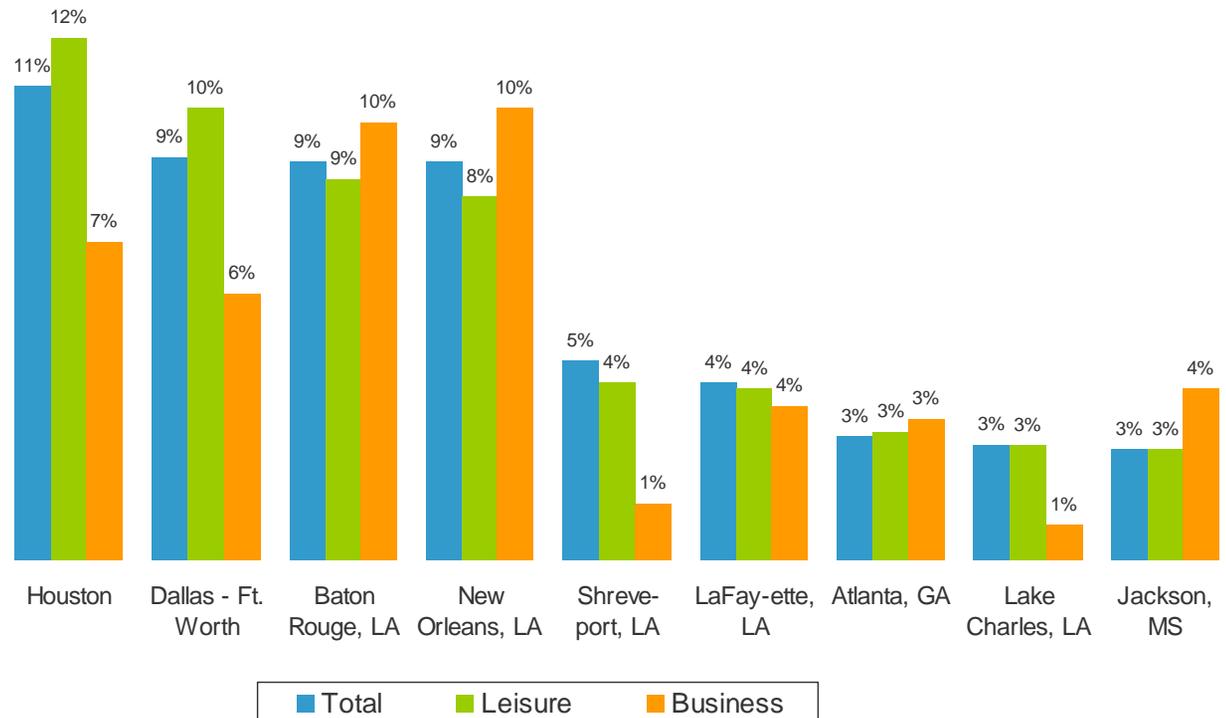
Visitor Residence

- Houston and Dallas – Ft. Worth provide the greatest proportion of visitors to Louisiana – particularly leisure travelers.
- Business travelers primarily travel within the state, notably from Baton Rouge and New Orleans.
- Out-of-state business travelers most often arrive from Houston and Dallas-Ft. Worth, but Jackson, MS contributes (4%) as well.



Source of Louisiana Visitors by DMA (3%+)

Base: Louisiana Visitors



Q1b: Which of the following was the primary purpose for the trip? (Household Level)

Panel: DMA residence of those who visited Louisiana (Household Level)

Louisiana's Business Development Index – Top 15

Louisiana's High BDI Marketing Area

- Louisiana attracts the largest proportion of residents from nearby Mississippi and Texas DMAs.
- Overall, 26 DMA areas show above average (index exceeds 100) likelihood to visit Louisiana; the top 15 are shown at right.
- The Business Development Index is calculated for each DMA to measure the propensity of US residents to take trips to Louisiana compared to the proportion that DMA constitutes of the total population. For example, Hattiesburg-Laurel, MS residents represent 0.098% of all US residents, but 1.019% of total Louisiana visitors. This yields an index value of 1038 ($1.019/0.098*100$).
- A list of the 50 highest BDI DMAs for Louisiana are listed in the Appendix at the end of the report.

Louisiana High BDI Index

DMA of Origin	INDEX
Hattiesburg-Laurel, MS	1038
Biloxi-Gulfport, MS	1010
Jackson, MS	954
Tyler-Longview, TX	737
Houston, TX	661
Greenwood-Greenville, MS	645
Panama City, FL	511
Beaumont-Port Arthur, TX	356
Abilene-Sweetwater, TX	300
Mobile, AL – Pensacola, FL	282
San Antonio, TX	262
Dallas-Ft. Worth, TX	258
Charlottesville, VA	251
Victoria, TX	215
Waco-Temple-Bryan, TX	207

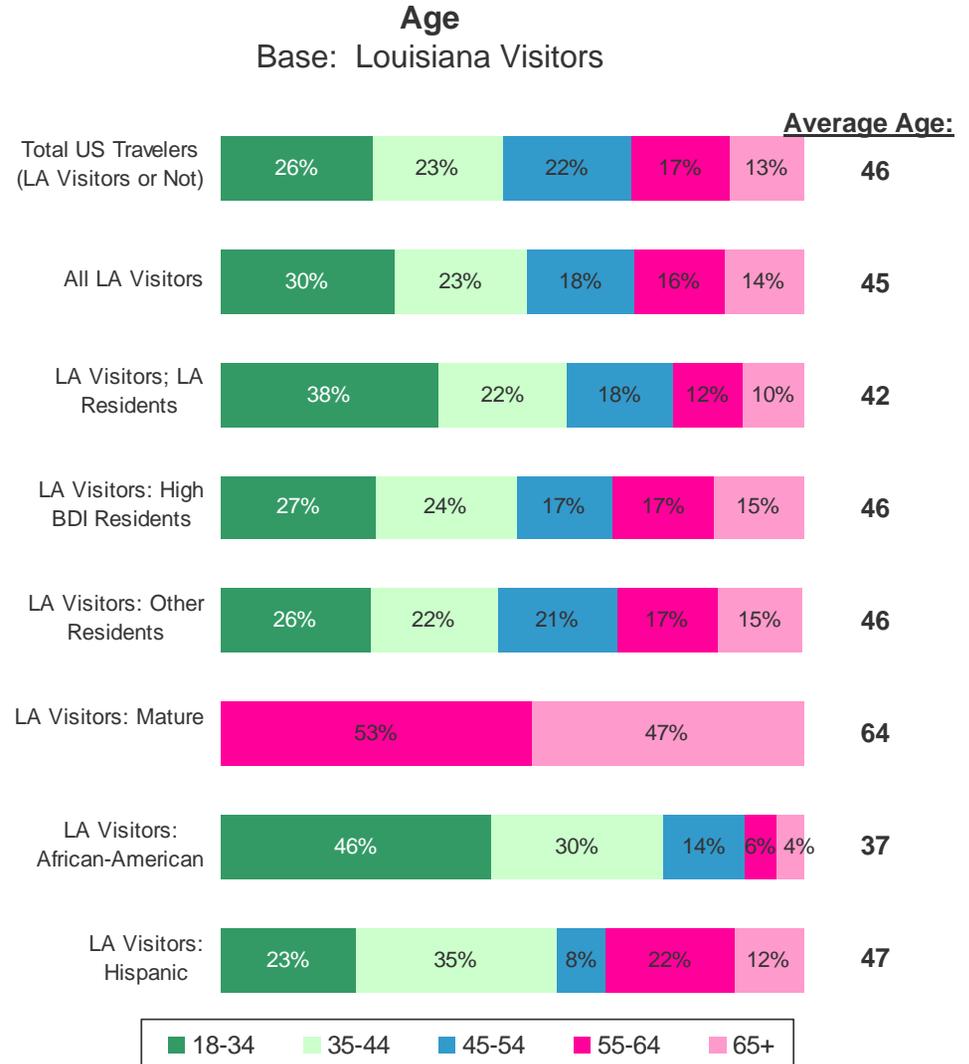
Visitor Demographics

Age of Visitors

Age patterns vary somewhat by key segments

Overall, Louisiana visitors resemble other US travelers, with a near match on the average age (45 vs. 46). However:

- Slightly more Louisiana visitors than total US travelers are under 35 (30% vs. 26%) and somewhat fewer are between 45 and 54 (18% vs. 22%).
- Of Louisiana visitors segments, the youngest visitors tend to be African-American (37) and those who live in the state (42).
- The Mature market (64) is older by definition. Hispanic visitors (47) are also slightly older.



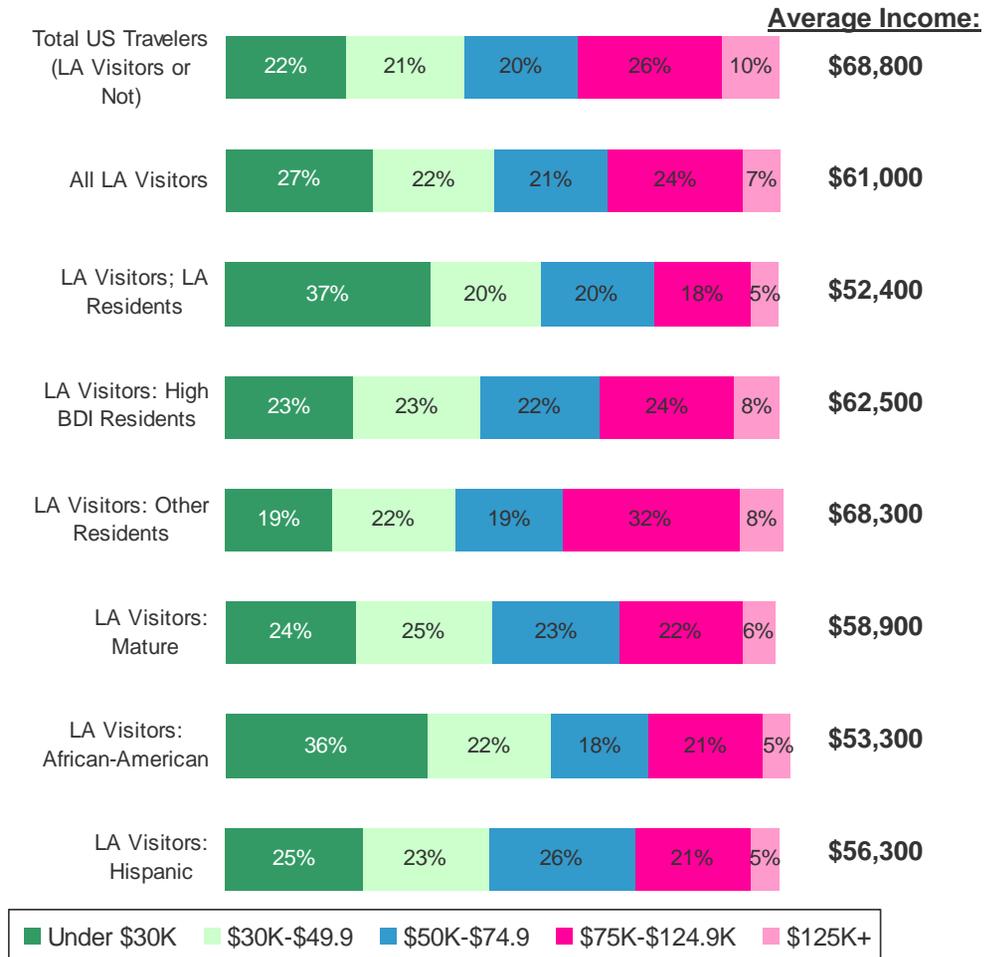
Household Income of Visitors

Wide income gaps appear between segments

Louisiana visitors report lower incomes than typical US travelers (\$61,000 vs. \$68,800). In addition:

- Those traveling the farthest (those who reside outside of Louisiana and the High BDI Marketing Area) report the highest incomes (\$68,300). Residents in the High BDI Marketing Area rank second (\$62,500).
- In-state visitors report the lowest income of all segments (\$52,400); African-Americans rank next-to-last (\$53,300).
- Mature visitors (\$58,900) place near the Louisiana average.

Household Income
Base: Louisiana Visitors



Other Visitor Demographics

Generally, characteristics of Louisiana visitors reflect US patterns regardless of residence

- The one exception is that those who reside in Louisiana are less likely be married (53% vs. 62% - 66% outside the state).
- **Marital status** - typically places near 60 percent, except African-Americans and Hispanics are less likely married.
- Somewhat more than a third (35% - 40%) of Louisiana visitors **live with children**. The proportion rises substantially among African-Americans (47%) and plummets for the Mature (8%) segment.
- **By ethnicity**, nearly a fifth of Louisiana visitors are African-American (19%), more than double the US traveler average (8%). The high proportion of African-American visitors is somewhat higher among Louisiana residents (22%), but the High BDI Marketing Area (19%) and other areas (15%) are also substantially above the average. Only the Mature market reverts to the US average (7%).

Gender, Marital Status, Household Composition, Ethnicity

Base: Louisiana Visitors (except the first column)

Other Demographics	Total US Travelers	Louisiana Visitors	From Louisiana	From High BDI	From Elsewhere	Mature	African-American	Hispanic
% Male	44%	43%	42%	45%	43%	51%	31%	39%
% Married	60	60	53	62	66	67	39	51
Household Composition								
% One Person	21%	20%	22%	20%	19%	27%	23%	28%
% Two People	35	35	32	33	40	53	19	28
% Three or More	44	45	46	47	40	20	59	45
% With Children	37	36	39	39	30	8	47	40
Ethnicity								
% Caucasian	87%	78%	75%	77%	82%	91%	na	na
% African-American	8	19	22	19	15	7	100	na
% Hispanic	4	4	4	4	3	4	na	100

QE: Please indicate your gender.

Other Visitor Demographics continued

Louisiana visitors resemble visitors to other areas, with a few variations

- **Attitudes** are built from TNS' FutureView™ Model which identifies five consumer categories. Of those, “Future Shapers” quickly adopt new products and influence others. They share seven traits: value authenticity/originality, well informed/involved, individualistic, time-poor, socially responsible, curious/open-minded/receptive to new ideas, and advocates of new ideas – they spread the word. Louisiana visitors from outside the state more likely score as “Future Shapers” or “Future Makers” (the top 2 of 5 consumer influencers) than in-state visitors (35% vs. 28%), suggesting that emphasis on authentic and unique aspects of the state could draw greater tourism from afar.
- About three in five Louisiana visitors are **employed** full time (58% - 63%); slightly more among African-Americans. The key exception are Mature visitors, half of whom are retired (51%).
- Residents outside Louisiana and the High BDI Marketing Area (Elsewhere) indicate more formal education; African-Americans trail other segments.

FutureView (Psychographics), Employment, Education

Base: Louisiana Visitors

Other Demographics %	Total US Travelers	Louisiana Visitors	From Louisiana	From High BDI	From Elsewhere	Mature	African-American	Hispanic
FutureView								
% Shapers/Makers	31%	32%	28%	33%	35%	31%	31%	31%
% Today Consumers	39	37	38	36	38	32	36	42
% Yesterday/Yesteryear	29	29	32	29	26	36	26	27
Employment								
% Full Time	60%	59%	62%	58%	59%	32%	67%	63%
% Retired	16	17	13	19	19	51	11	17
% Other	24	23	26	23	22	17	22	20
Education								
% Some College or Less	58%	61%	66%	64%	53%	63%	68%	61%
% College Grad +	42	39	34	37	47	37	32	39

Trip Characteristics and Satisfaction

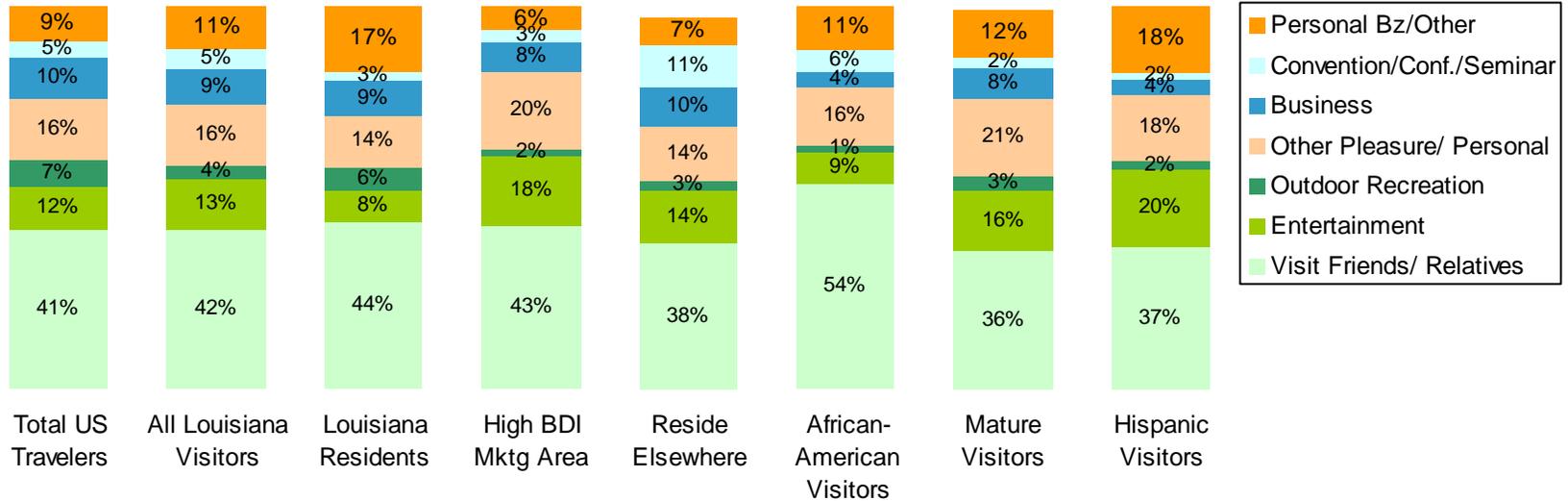
Trip Purpose

Visitors to Louisiana usually journey for pleasure

The leading attraction appears to be friends and relatives, which holds for all travelers, not just Louisiana visitors:

- Residents from the High BDI Marketing Area (18%) and those from farther distances (14%) seek (and would presumably be most influenced by) entertainment options more often than other visitors.
- African-Americans more often visit friends and relatives than others.
- Mature visitors more often pursue entertainment (16%) and other (unidentified) pleasure activities than other groups.

Primary Purpose of Trip
Ranked by All Sources (5%+)



NET Leisure:	76%	75%	72%	83%	68%	79%	76%	77%
NET Business:	15%	14%	11%	11%	22%	9%	10%	5%

Trip Characteristics: Leisure vs. Business Traveler

Trip Characteristics vary by purpose

- Compared to business travelers, leisure travelers more often do the following: drive their own auto/truck, choose to stay with friends/relatives rather than a hotel, and travel with others.
- Conversely, business travelers fly more frequently, stay longer, and pay for lodging (hotel/motel).

LOUISIANA VISITORS Trip Choices (Trip Level)	Total	Leisure	Business
PRIMARY TRIP PURPOSE			
NET Leisure/Personal	75%	100%	0%
Visit Friends/Relatives	42	56	0
Entertainment/Sightsee	13	18	0
Business; Combined Bs/Ls	14	0	100
Personal Bs/Other	11	0	0
PRIMARY MODE			
% Own Auto/Truck	75%	81%	42%
% Air Travel	12	9	36
AVG # IN TRAVEL PARTY			
% Traveling Solo	27%	20%	60%
% Traveling With Children	35	31	9

Q1b: Which was the primary purpose of trip?

Q2b: Which was the primary mode of transportation?

Q3a: Please indicate number of travel party members (including yourself) under 18 and 18+.
(Trip Level – demo wtd)

LOUISIANA VISITORS Lodging (State Level)	Total	Leisure	Business
AVG # NIGHTS (if any)			
Private Home	1.4	1.7	0.1
Hotel/Motel	1.3	0.9	3.3
All Other	0.3	0.3	0.5

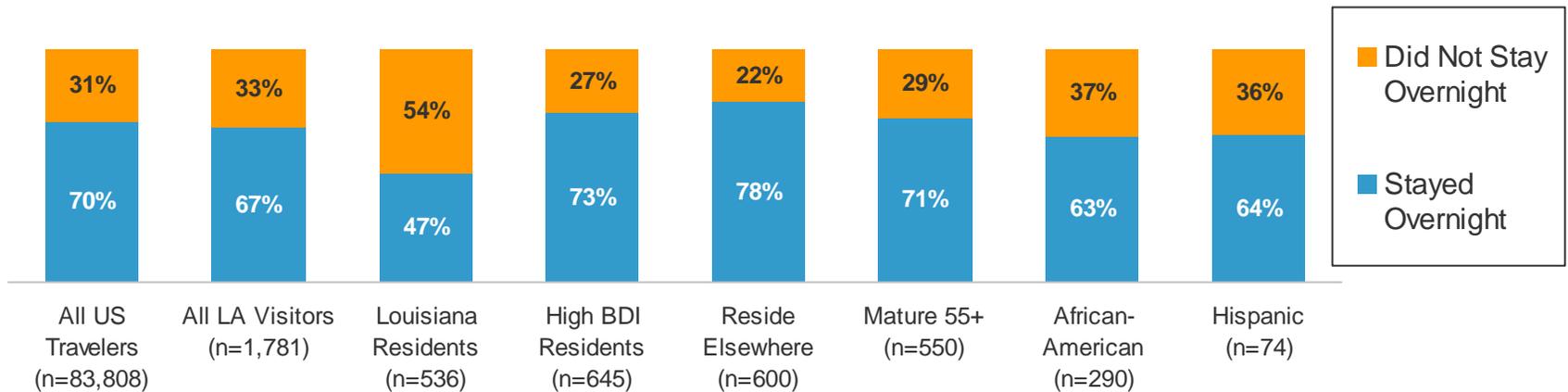
Q4f: Please specify the number of nights stayed at each listed accommodation (State Level – demo wtd).

Visitor Nights: Day vs. Overnight

Overnight trips dominate leisure trips

- Louisiana visitors (67%) are nearly as likely to spend the night as the typical US traveler (70%).
- Logically, those who live in-state are most likely to take a day-trip (54%); conversely, those who travel the greatest distance are most likely to stay overnight (78%).
- More than a third of the ethnic groups, African-Americans (37%) and Hispanics (36%), come just for the day.

Day vs. Overnight

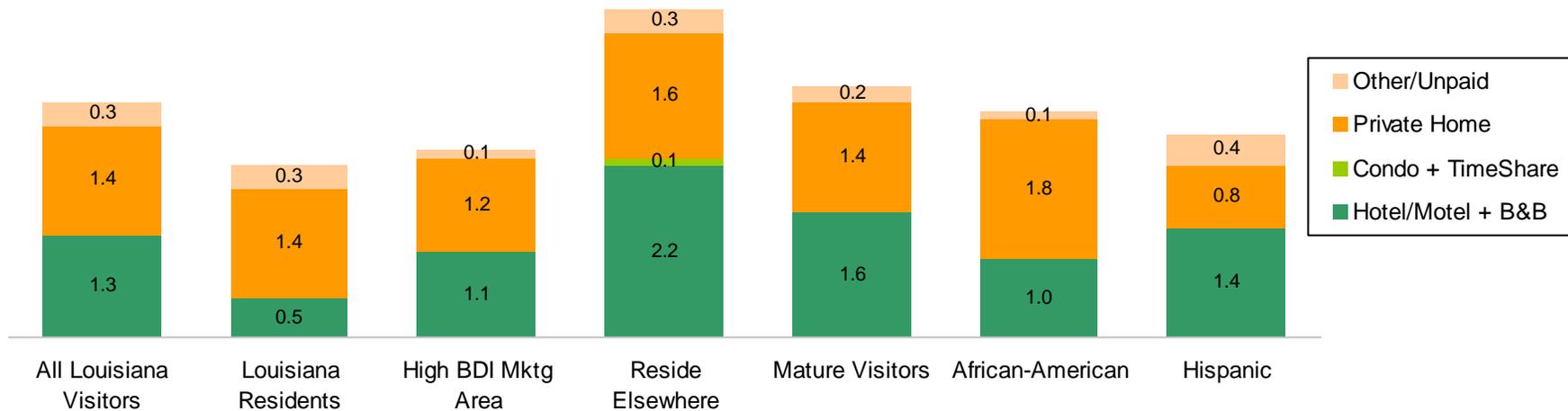


Accommodations and Length of Stay

Somewhat less than half (43%) of overnight trips include a stay at a hotel/motel or B&B

- As shown previously, Louisiana residents are least likely to take an overnight trip in Louisiana. Even when they do, they spend fewer nights in total and less than half as many nights in paid accommodations.
- The group that spends the most time in Louisiana are the more distant travelers (4.1 nights); Mature visitors rank second (3.3 nights).
- African-Americans stay an average number of nights (2.9), but spend the most time of any segment in private homes (1.8 nights).

Length of Stay
Base: Overnight Visitors



Average # of Nights:

	All Louisiana Visitors	Louisiana Residents	High BDI Mktg Area	Reside Elsewhere	Mature Visitors	African-American	Hispanic
Total	3.0	2.3	2.6	4.1	3.3	2.9	2.6
Paid*	1.3	0.5	1.1	2.2	1.6	1.0	1.4
% Paid/Total	43%	22%	42%	54%	48%	34%	54%

* Hotel/Motel/B&B

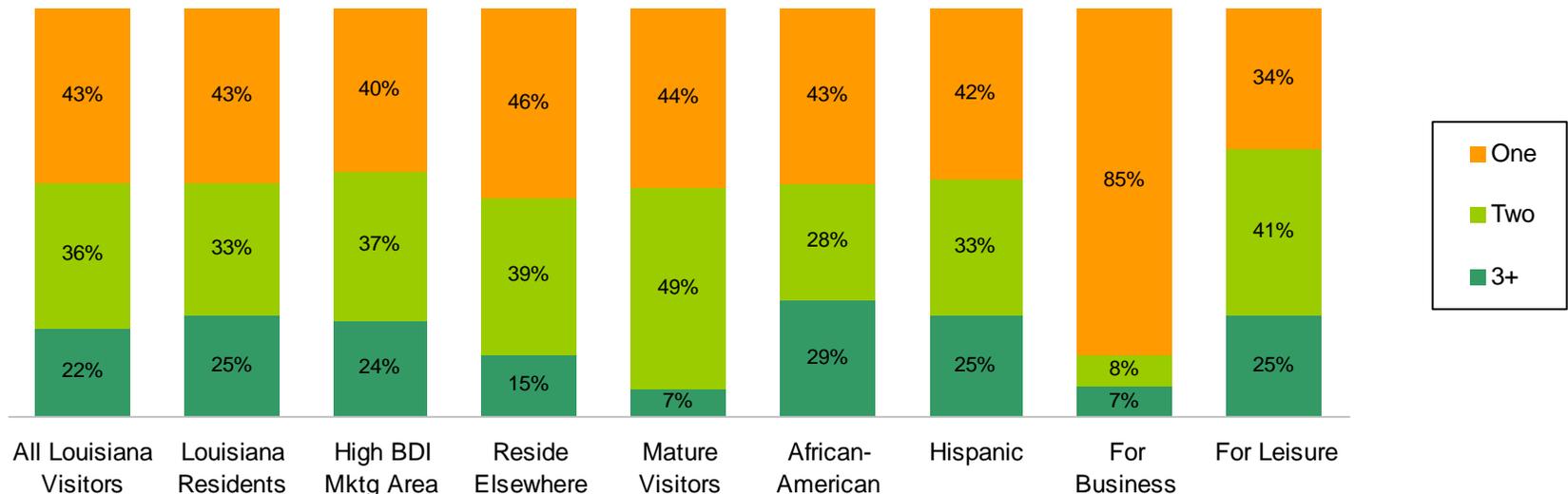
Travel Party Size

Visitors to Louisiana usually visit either alone or with one other

Business travelers usually (85%) travel solo while leisure travelers more often come in pairs (41%):

- Those least likely to travel in a larger group (3+ household members) are business and Mature travelers.
- African-Americans are most likely to travel in a larger group.
- Those traveling greater distances (reside elsewhere) represent smaller travel parties (perhaps reflecting the cost of air travel) than the other two residence areas (Louisiana or the High BDI Marketing Area).

Number of Household Members in Travel Party (Including Self)



Average # of Household Members in Travel Party:

Total	2.0	2.0	2.2	1.8	1.8	2.2	2.0	1.7	2.1
% w/Children	24%	30%	21%	18%	5%	34%	23%	8%	27%

NOTE: The travel party could include non-household members, which theoretically, would be covered by another household. The proportion traveling in pairs may be somewhat lower than expected because “couples” who are not married or living together would respond as “one.”

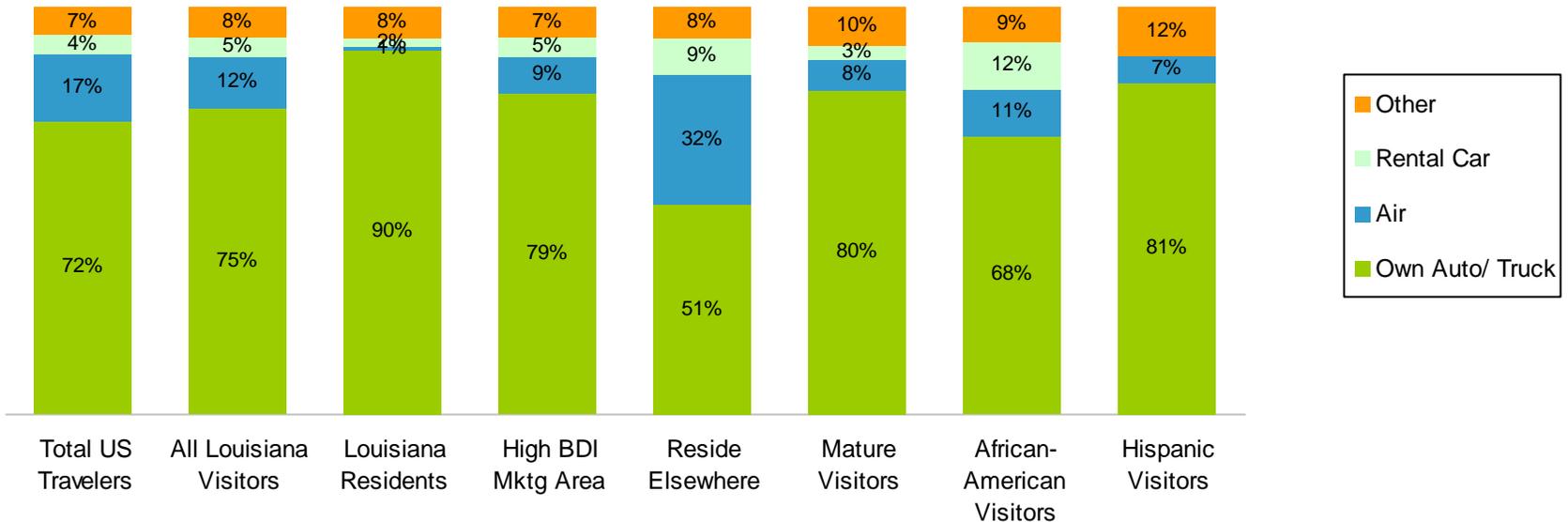
Primary Mode of Transportation

Most travelers drive to their destination

Although overall Louisiana visitors choose transportation similar to overall US travelers, distance notably affects transportation choice:

- Louisiana residents drive more often to Louisiana destinations than any other segment.
- Conversely, those residing outside both the state and the High BDI Marketing Area fly most often.
- African-Americans are more likely than others to rent a car for a vacation trip.

Primary Mode of Transportation of Louisiana Visitors



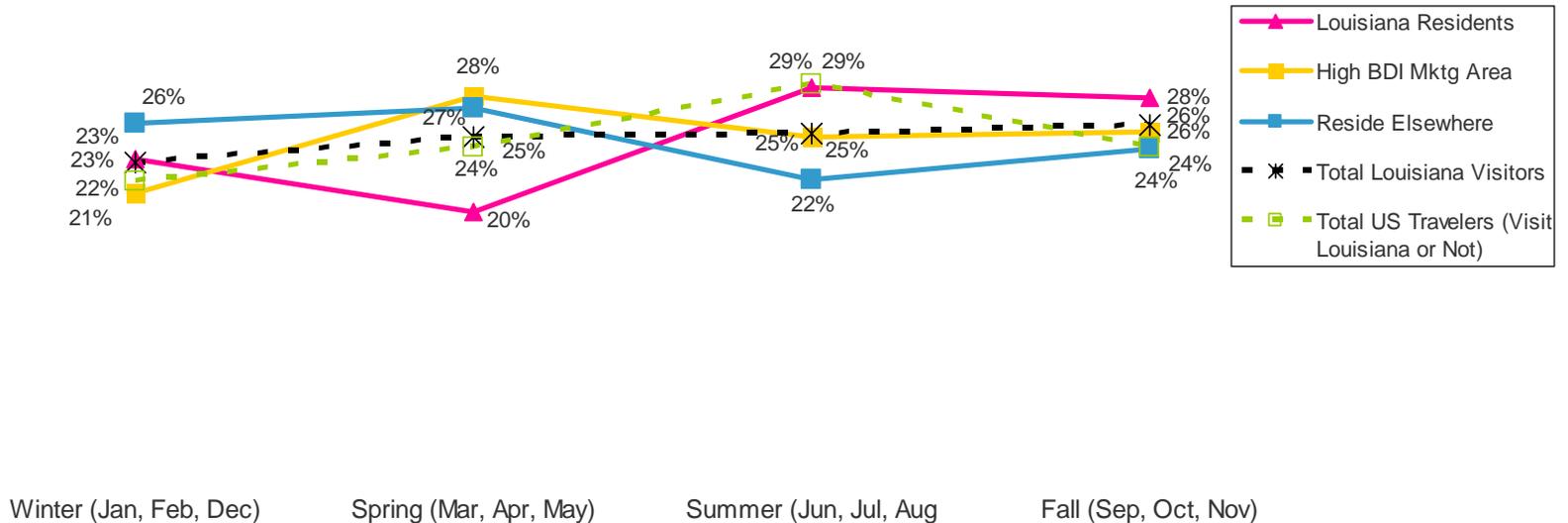
Trip Timing

Nationally, most travel occurs in Summer

However, Louisiana visitors do not always follow the national pattern, with diverse results by area of residence:

- Louisiana residents most frequently travel within the state in **Summer and Fall**, least often in the Spring.
- Conversely, those living in the High BDI Marketing Area are most likely to visit in the **Spring**.
- Those living elsewhere are more likely to avoid Louisiana in the Summer, opting to visit in the **Spring** (Winter ranks second) instead.

TIMING OF TRIP BY SEASON
Base: Visited Louisiana in 2007

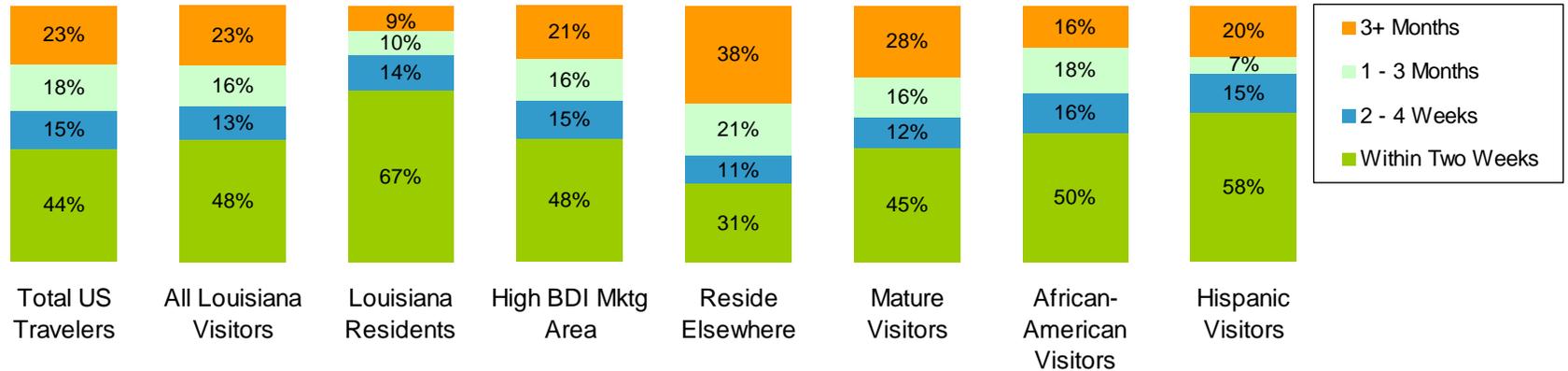


Trip Planning - Timing

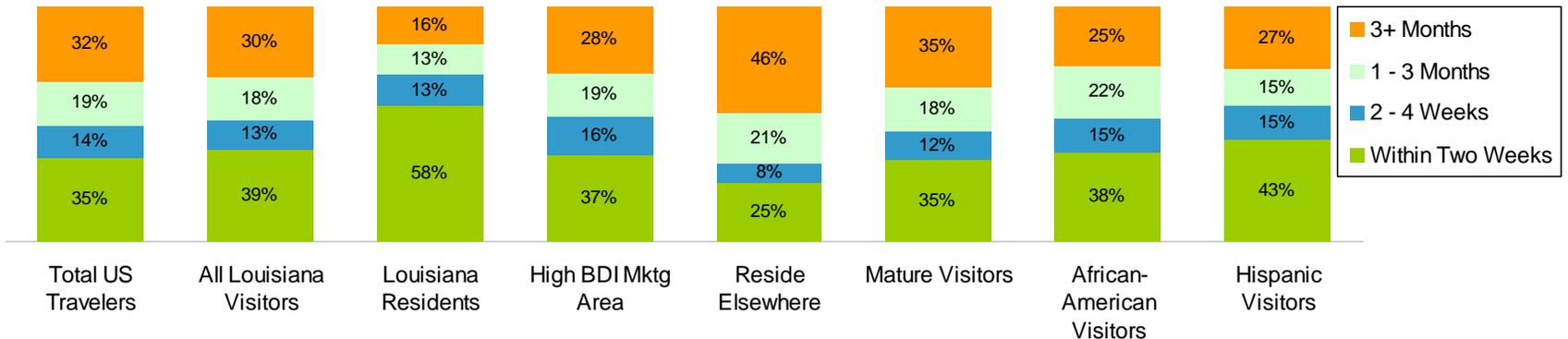
Logical patterns occur for trip planning

- With fewer planning to spend the night, in-state visitors consider and decide to take relatively spontaneous trips.
- Conversely, those traveling from farther distances (reside elsewhere) have longer planning horizons.
- Mature visitors and African-American visitors consider and decide on trips to Louisiana at roughly the same rate as total visitors.

Time Decided On Trip Before Visit to Louisiana (except Total US Travelers = all trips)



Time Considered Trip Before Visit to Louisiana (except Total US Travelers = all trips)



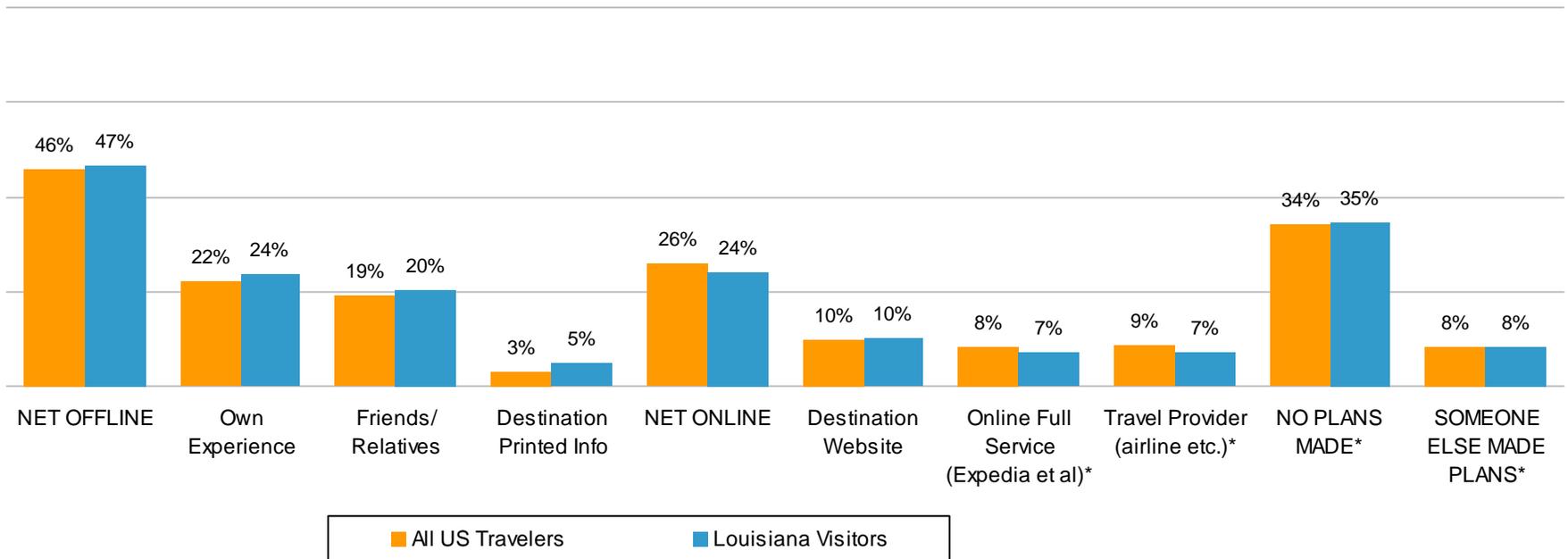
Trip Planning – Information Sources

Trip Planning Sources

Destinations, in order to be selected, must provide potential travelers with information that encourages visits. Results indicate that Louisiana visitors use the same information sources as other travelers:

- A third of leisure travelers (34% - 35%) do not recall “making plans.”
- The Internet is a popular place to gather information (26% all travelers vs. 24% for Louisiana visitors).
- Many rely on their own experience (22% - 24%) and friends/relatives (19%-20%) recommendations/advice.

Information Sources to Plan a Trip
Ranked by All Sources (5%+)



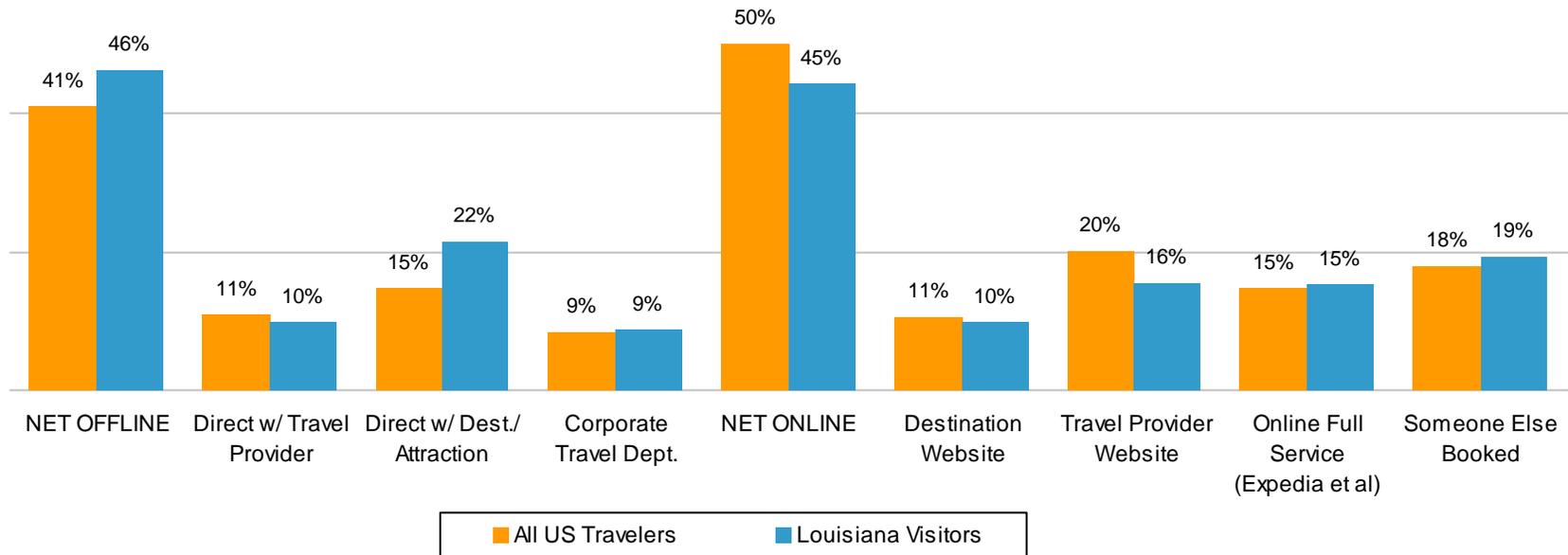
Trip Booking

Trip Booking Methods

Despite gathering information from the similar sources, Louisiana visitors book their trip components differently than other travelers:

- Somewhat more of Louisiana visitors book “offline” (46%) than total US travelers (41%).
- The reverse occurs for booking by Internet: 45 percent of Louisiana visitors book online vs. half (50%) of all travelers, primarily via travel provider websites (16% vs. 20%) and online full service agencies (15% vs. 15%).
- Booking through destination websites (10% - 11%) ties “direct with travel provider” (10%) for fourth-place booking source overall (online/offline combined).

Method Used to Book Trip Components
Ranked by All Sources (5%+)



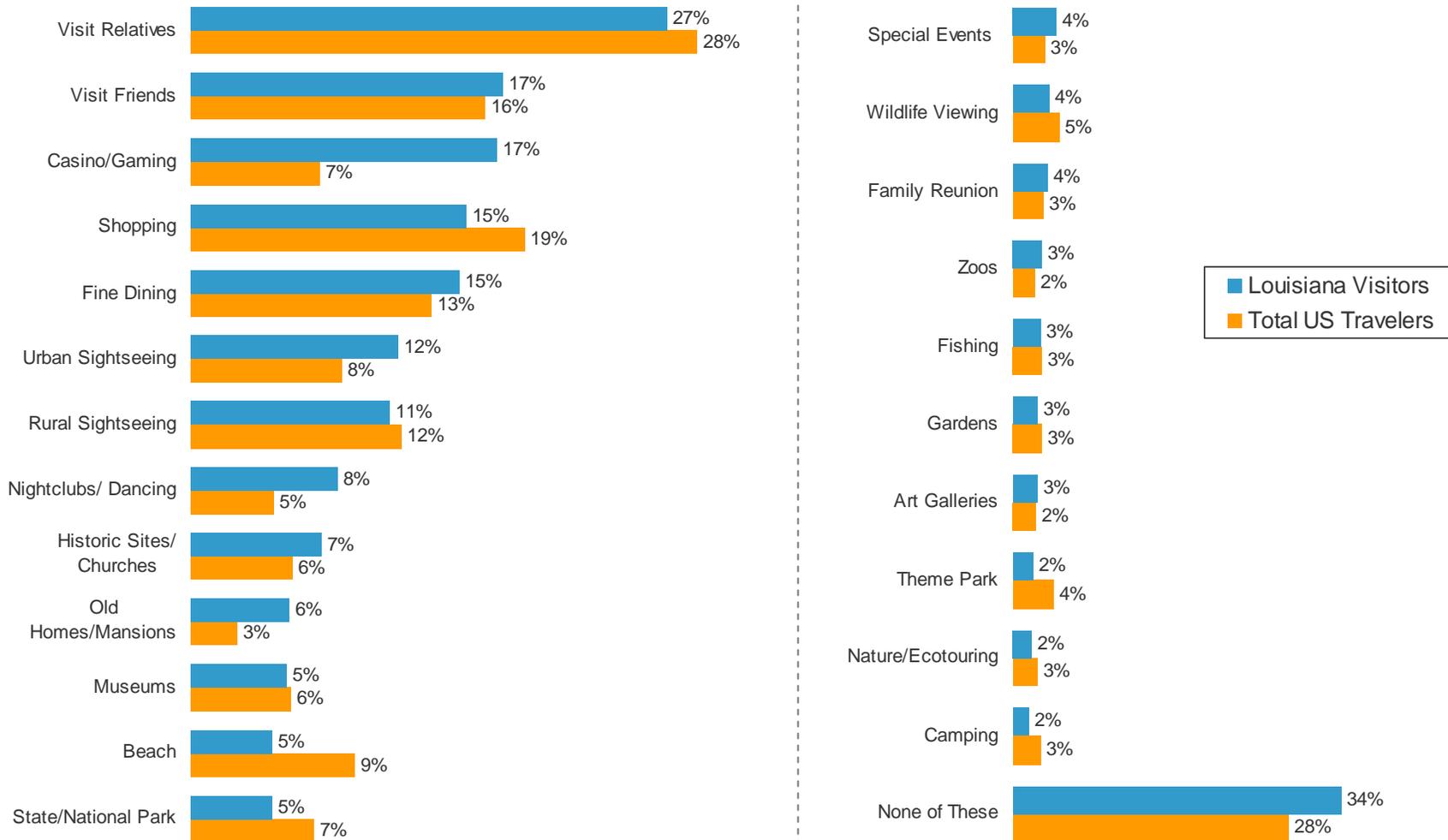
Trip Characteristics: Vacation Activities Overall

Top Vacation Activities/Attractions

With a few notable exceptions, Louisiana visitors choose roughly the same activities/attractions as other US travelers. Louisiana visitors more often play casino games, take advantage of urban activities (fine dining, sightseeing, nightclub dancing), and view old/homes and mansions. However, they less frequently shop, go to the beach, or visit state/national parks.

Activities Participated/Attractions Visited

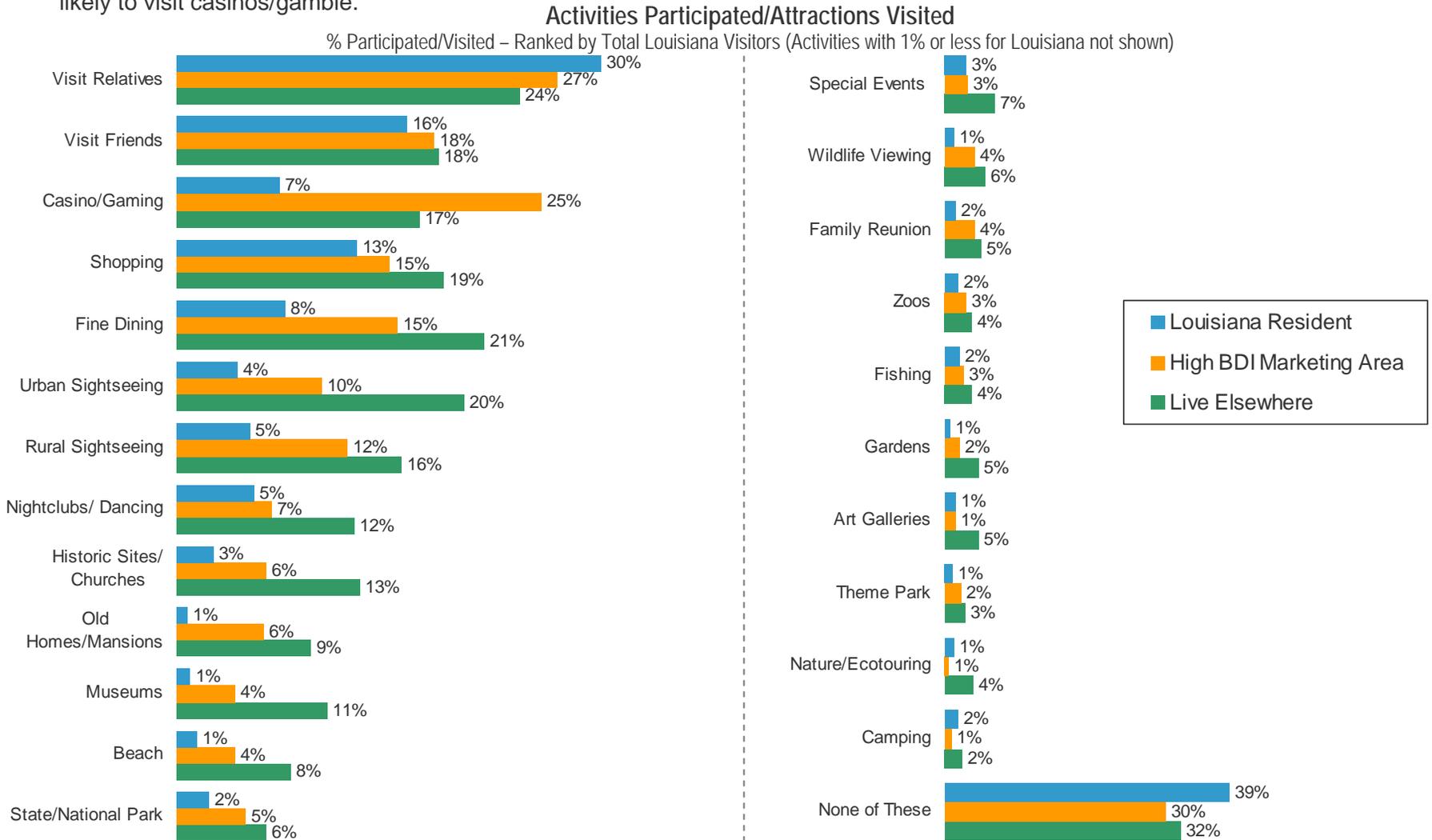
% Participated/Visited – Ranked by Louisiana Visitors (Activities with 1% or less for Louisiana not shown)



Trip Characteristics: Vacation Activities by Residence

Top Vacation Activities/Attractions

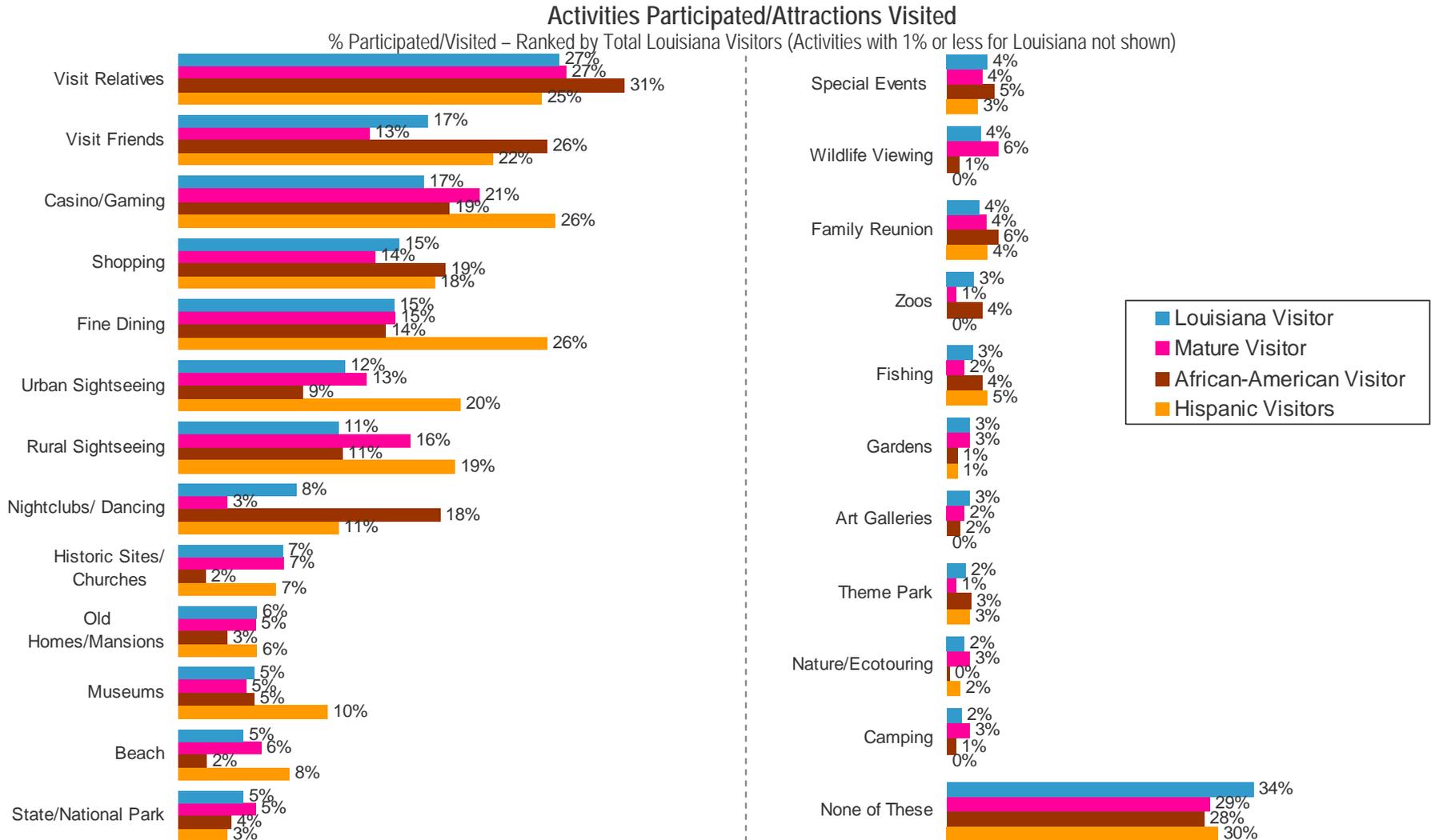
Residence strongly impacts the choice of activities pursued by Louisiana visitors. In-state visitors more often visit relatives, but otherwise lag other visitors on nearly every activity. Those living elsewhere (outside Louisiana and not in the High BDI Marketing Area) take greater advantage of nearly all Louisiana's tourism features. However, those in the High BDI Marketing Area are most likely to visit casinos/gamble.



Trip Characteristics: Vacation Activities by Segment

Top Vacation Activities/Attractions

Different activities attract different types of visitors. Consistent with their travel purpose, African-Americans are much more likely to travel to Louisiana to *visit friends* and *relatives*. Plus, they strikingly more often go to *nightclubs/dancing*. Compared to others, the Mature and Hispanic segments more often choose *casinos/gaming* and *sightseeing*. Hispanics also add *fine dining*.

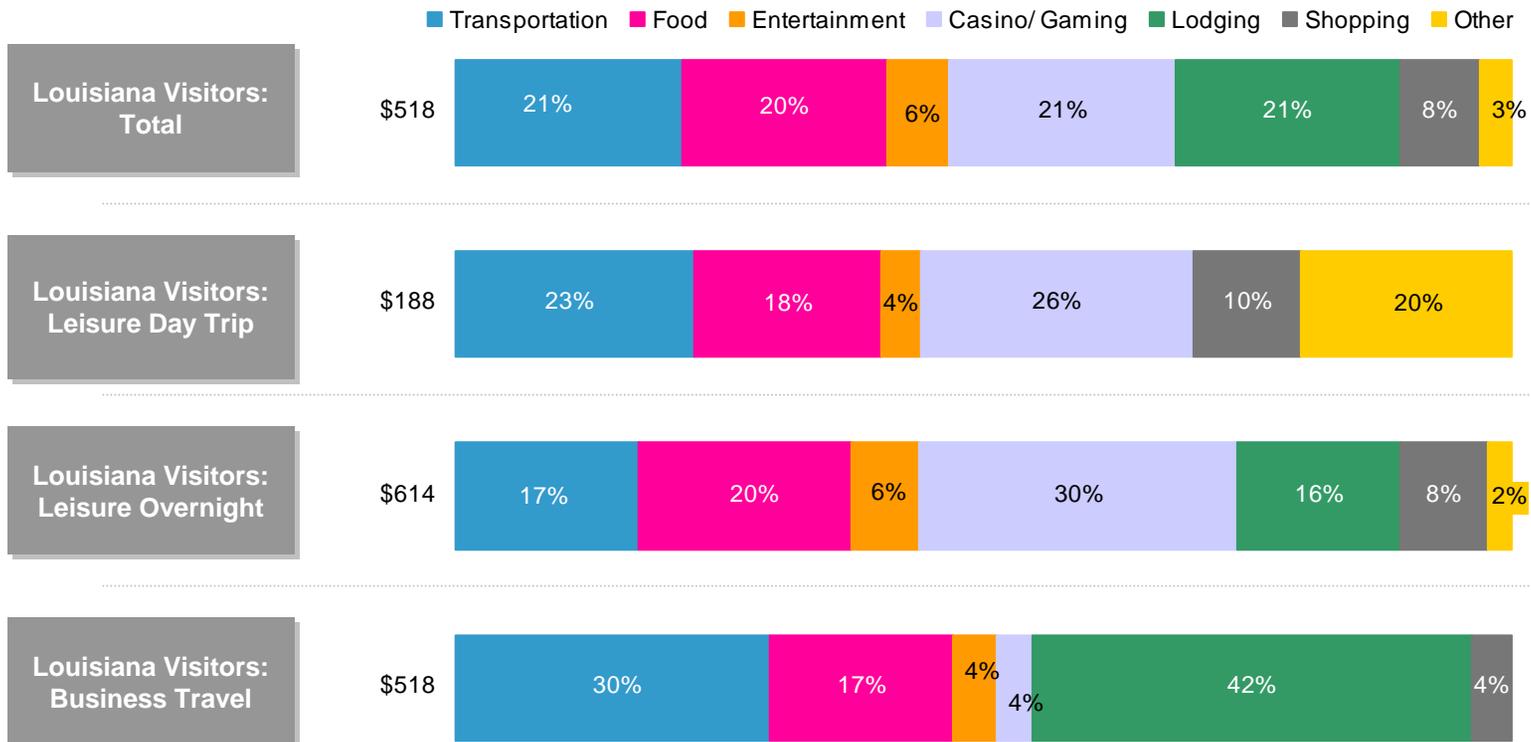


Trip Characteristics: Expenditures by Type of Travel

Value of Visitors

- Overnight visitors spend more than three times as much as day-trip visitors (\$614 vs. \$188).
- Besides adding dollars for lodging, overnighters allocate a much larger share of their travel budget to casinos/gaming.
- Business travelers assign larger portions of their travel budget to lodging and transportation (consistent with their greater likelihood of flying).

Average Spending in Louisiana by Trip Type
Total Spending by Travel Party (Total Spending, including 0)



Note: Transportation includes parking/tolls. Food includes food/beverage/dining/groceries. Other includes amenities/other.

Trip Characteristics: Expenditures by Residence

Value of Visitors

- Logically, those traveling a greater distance spend a larger portion of their budget on lodging (29%).
- High BDI Marketing Area residents spend the largest share (41%, which is also the largest amount of any segment -- \$224) on gaming.
- Food “consumes” the largest bite out of in-state visitors’ expenditures.

Average Spending in Louisiana by Trip Type
Total Spending by Travel Party (Total Spending, including 0)

■ Transportation ■ Food ■ Entertainment ■ Casino/ Gaming ■ Lodging ■ Shopping ■ Other



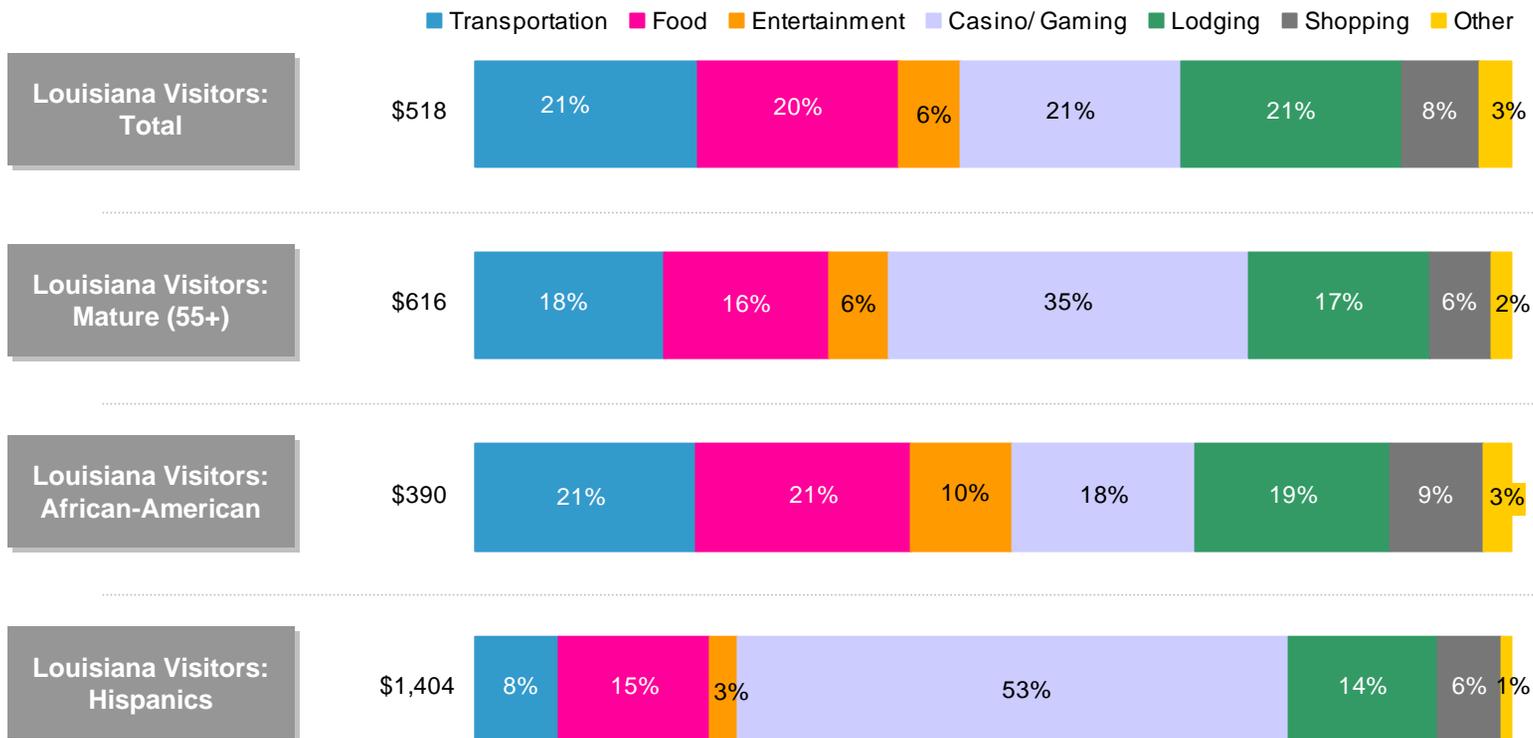
Note: Transportation includes parking/tolls. Food includes food/beverage/dining/groceries. Other includes amenities/other.

Trip Characteristics: Expenditures by Segment

Value of Visitors

- Mature visitors spend above average amounts while visiting Louisiana (\$616 vs. \$518 overall), particularly on gaming.
- Although they spend less overall, African-Americans allocate similar proportions to most components as the average visitor – except they spend more on entertainment – consistent with their activity choices (above average selection of nightclubs and dancing).
- Hispanics claim to spend more, but this is based to only a few respondents (35 unweighted) who attribute much of their spending to casino/gaming.

Average Spending in Louisiana by Trip Type
Total Spending by Travel Party (Total Spending, including 0)



Note: Transportation includes parking/tolls. Food includes food/beverage/dining/groceries. Other includes amenities/other.

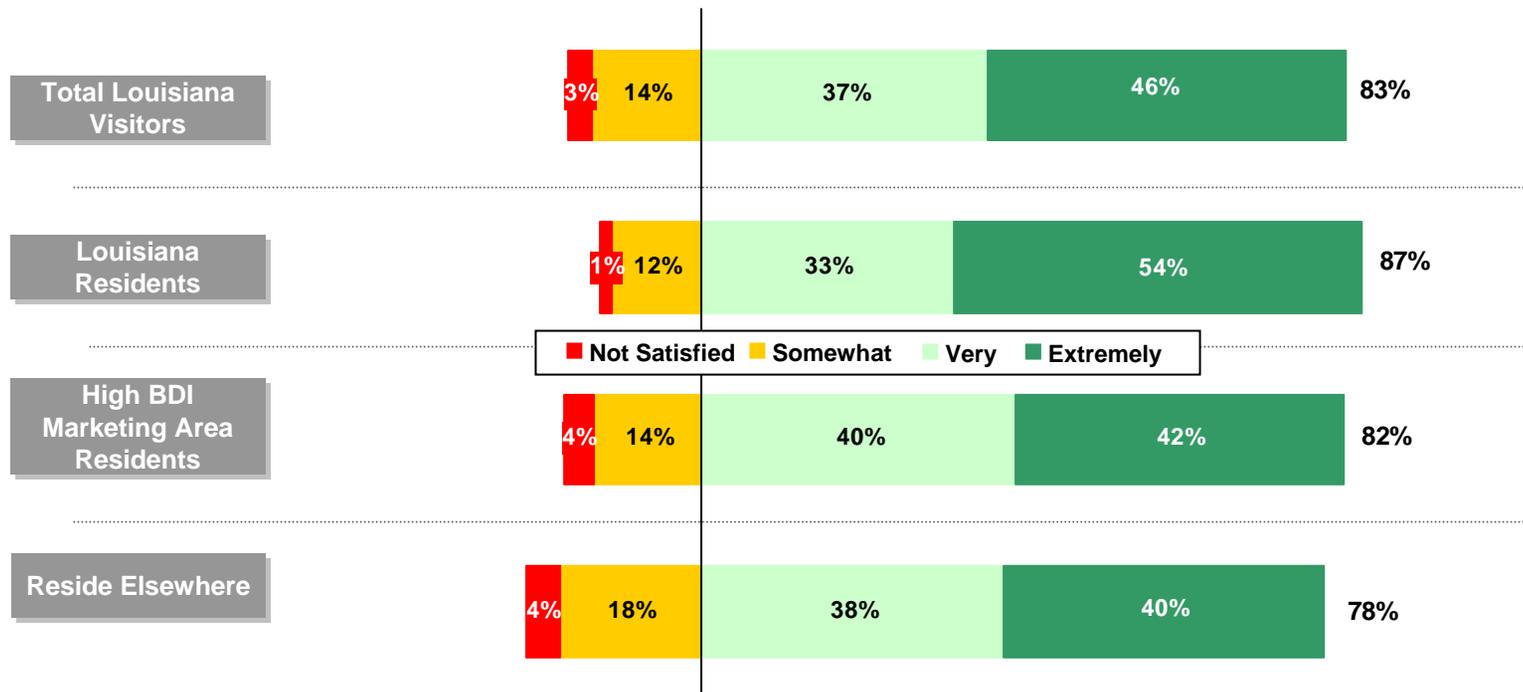
Satisfaction: Louisiana By Residence

Satisfaction with Louisiana

Overall satisfaction declines with distance, but is still relatively strong:

- Nearly nine out of 10 (87%) **Louisiana residents** are either *extremely* or *very* satisfied with a Louisiana vacation; half (54%) opt for the highest rating (extremely satisfied).
- A large majority of residents of the **High BDI Marketing Area** are also complimentary (82%).
- Those traveling from **farther away** express almost as much enthusiasm . . . almost four-fifths return home happy.
- Few (2%) in-state visitors indicate displeasure; the ratio increases (4%) for more distant visitors.

Satisfaction with Louisiana Visit
By Residence



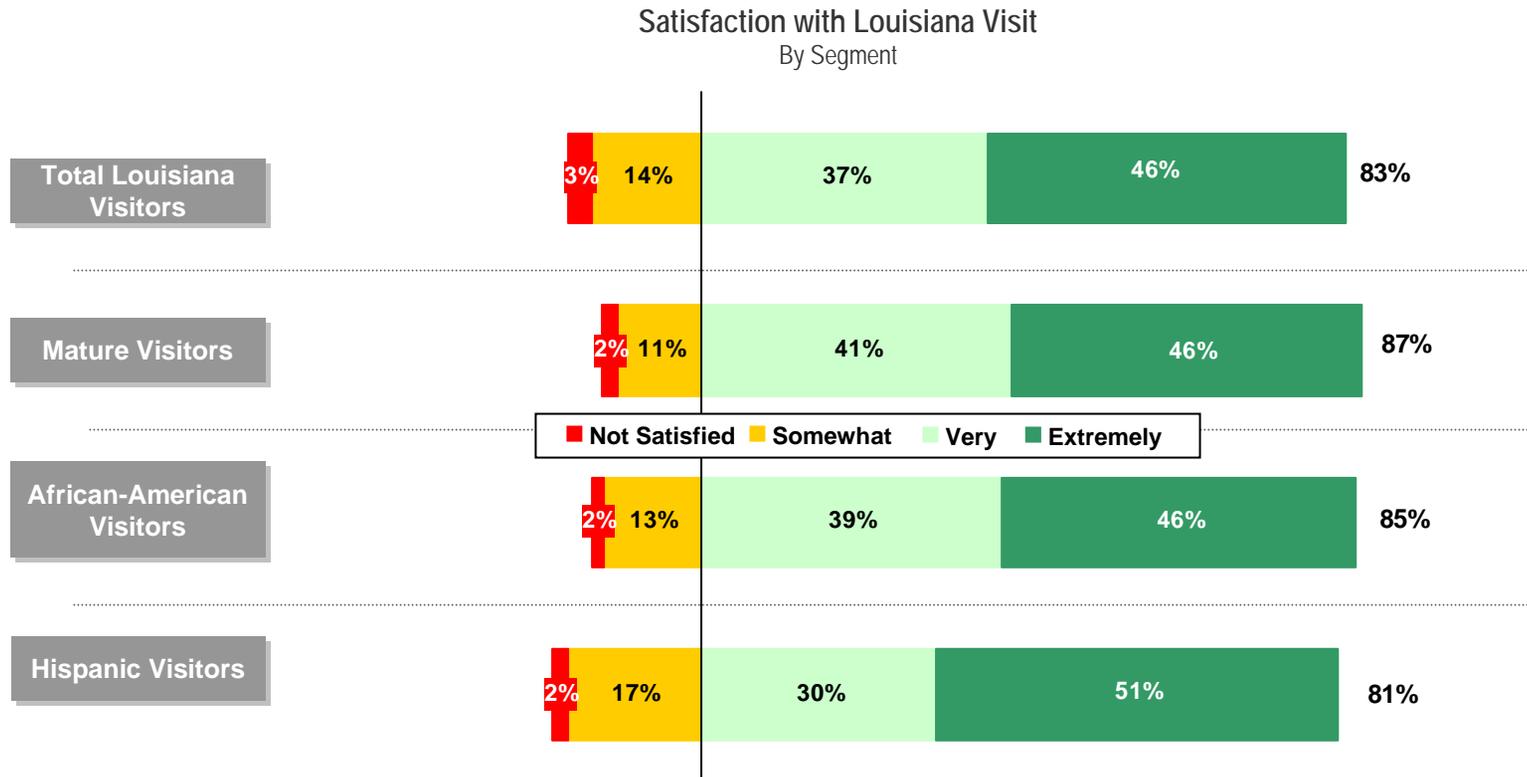
*Note: Not Satisfied includes *Not At All* and *Not Very Satisfied*

Satisfaction: Louisiana By Segment

Satisfaction with Louisiana

Overall satisfaction varies slightly by segment:

- Mature visitors appear most satisfied (87% either *extremely* or *very* satisfied) with their Louisiana vacation.
- African-Americans nearly match that level (85%).
- More Hispanics (51%) assign the highest level (*extremely* satisfied), but fewer are *very* satisfied (30%).
- Regardless of segment, few (2%) visitors indicate displeasure.



*Note: Not Satisfied includes *Not At All* and *Not Very Satisfied*

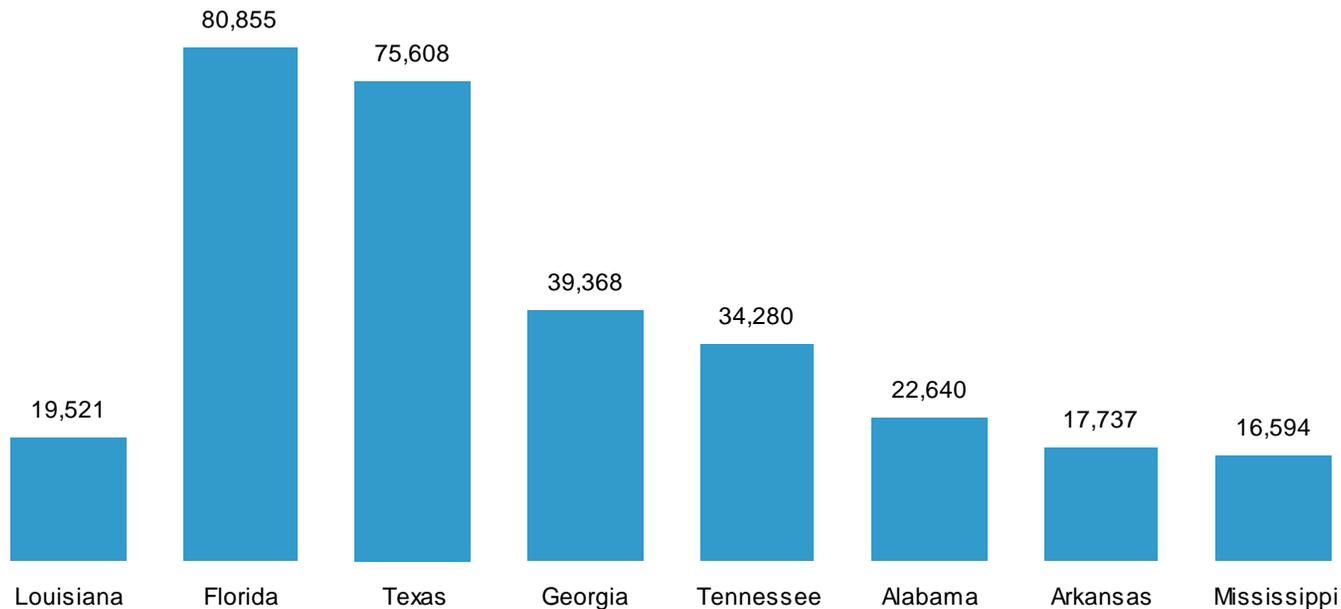
Competitive States

Competitive States' Visitor Volumes

Among eight key competitors, Louisiana ranks sixth

- Florida and Texas draw the largest share of visitors, although Texas is most dependent of all states upon in-state visitation
- Louisiana draws a relatively high proportion of visitors from out-of-state – similar to Tennessee, Alabama, Arkansas, and Georgia.

Visitors (Person-Trips) to Louisiana and Competitive States
(Volume in 000)



% (Households) from Out-of-State

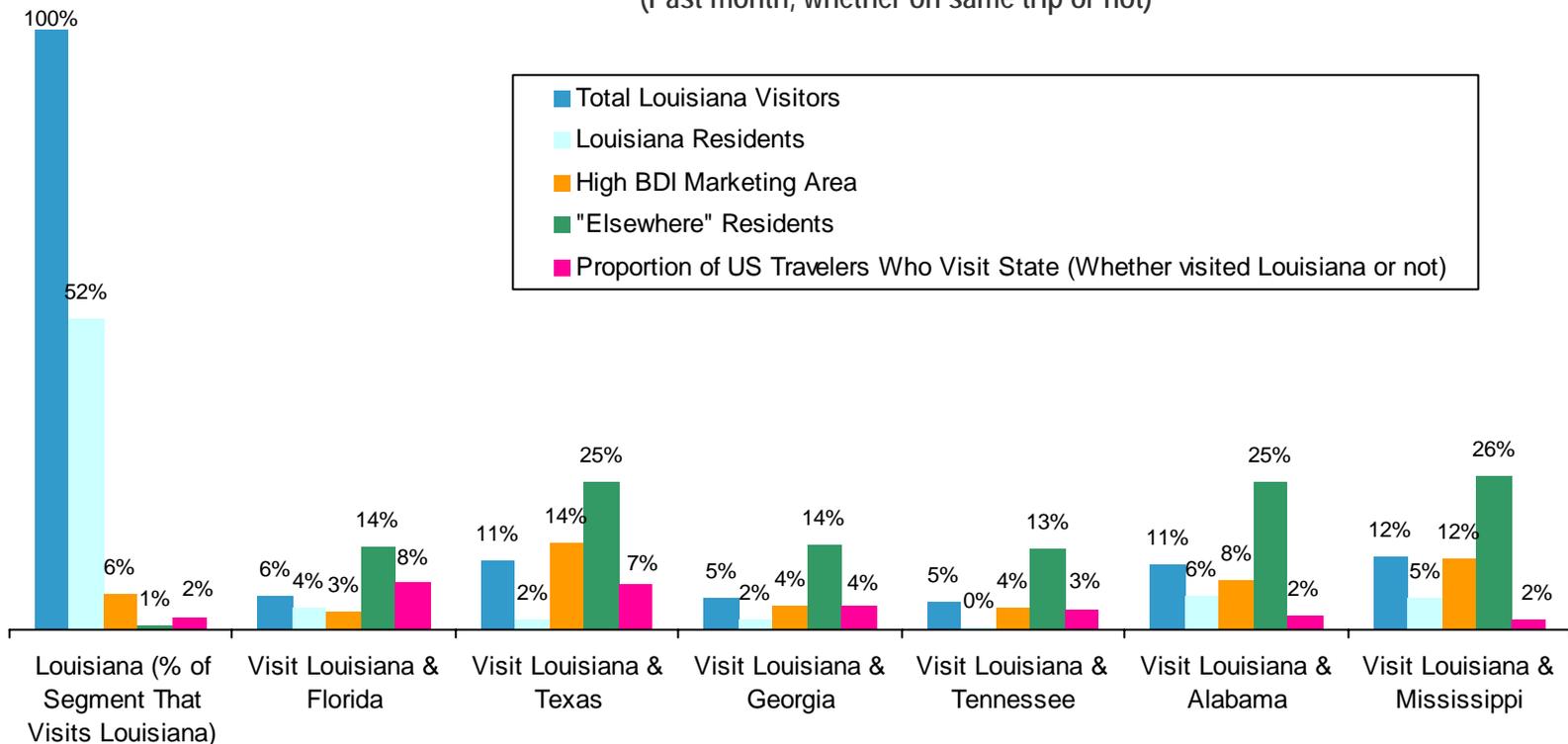
68% 58% 31% 65% 72% 70% 67% 58%

Key Competitors to Louisiana (Among Louisiana Visitors)

Louisiana primarily shares its visitors with Texas, Alabama, and Mississippi

- Among the total US market of all travelers, Florida (8%) and Texas (7%) draw the largest share of visitors among these key states. Louisiana, Alabama, and Mississippi attract the same proportion of visitors (2%).
- Texas, Alabama, and Mississippi most often entice Louisiana visitors to also stop in their state, whether they live in Louisiana, the High BDI Marketing Area, or Elsewhere.

Proportion of Louisiana Visitors Also Visiting Competitive States (5%+)
(Past month, whether on same trip or not)



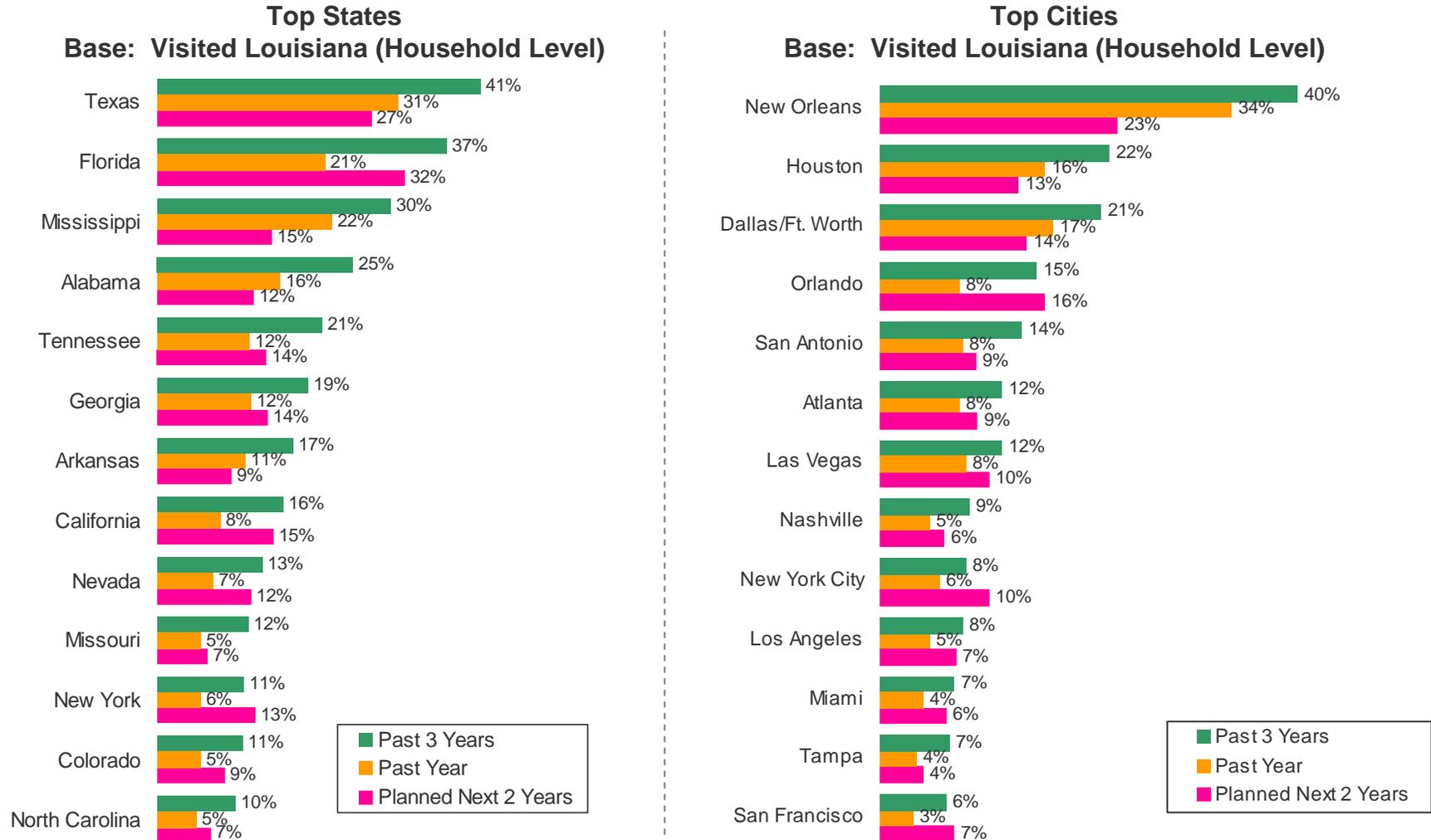
Competitive State and City Destinations

Southern areas compete with Louisiana

Louisiana visitors usually choose other southern states and cities for additional vacation travel. Las Vegas and New York City represent the leading non-Southern cities. Orlando, NYC, and San Francisco, uniquely, generate greater future interest than in the recent past.

Other Areas Visited by Louisiana Visitors (Key Competitors)

% Visiting State/DMA Past Three Years (Ranking), Past Year, Planned Next Two Years



Another View of Key Competitors (Visited Louisiana or Not)

Geography impacts destination choices

As noted in other TNS reports, geography plays a key role in destination selection – the states most likely visited vary by travelers' residence:

- If travelers **live in Louisiana**, they are more likely to have visited *Texas* (49%) than *Louisiana* (46%) in the past three years. *Mississippi* (36%) and *Florida* (35%) rank second. However, “recency” (past year) moves Louisiana to the lead (42%). For future travel, *Florida* and *Texas* have created the greatest interest
- If travelers **live in the High BDI Marketing Area**, *Texas* tops the list for past visits (3 years or 1 year) while *Florida* (slightly) takes the lead for future plans. *Louisiana* holds third place in all three time periods..
- Those living **elsewhere (neither the High BDI Marketing Area nor Louisiana)** seldom (5% in past 3 years) choose to visit *Louisiana*, usually opting for *Florida*.

Visitation (Households) by Residence Over Time

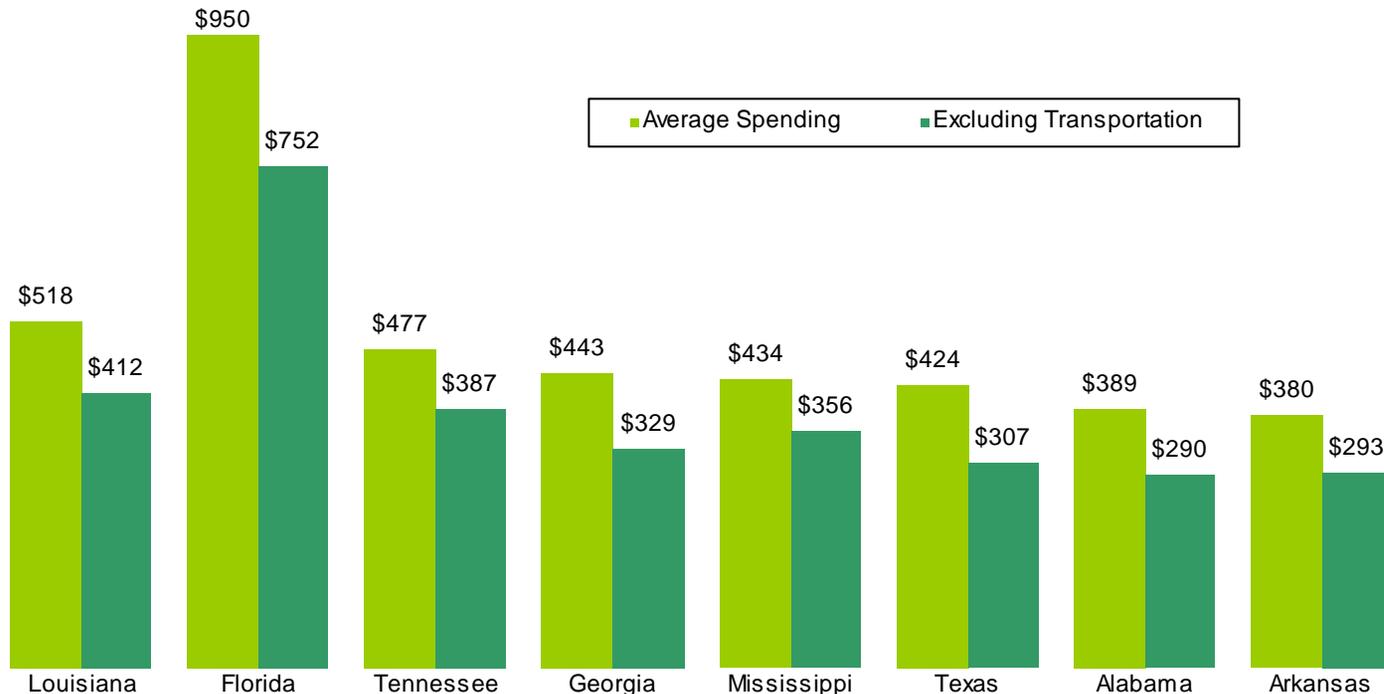
Competitive Set: AL, AR, FL, GA, LA, MS, TN, TX	Visited Past 3 Years	Visited Past Year	Plan to Visit Next 2 Years
RESIDE IN LOUISIANA			
Visit Louisiana	46%	42%	22%
Strongest Competitor (of the set)	49 (TX)	36 (TX)	37 (FL)
Second-Strongest Competitor	36 (MS)	25 (MS)	36 (TX)
Third-Strongest Competitor	35 (FL)	21 (FL)	19 (MS)
RESIDE IN HIGH BDI MKTG AREA			
Visit Louisiana	24%	15%	14%
Strongest Competitor	45 (TX)	40 (TX)	26 (FL)
Second-Strongest Competitor	26 (FL)	17 (FL)	25 (TX)
Third-Strongest Competitor	16 (AR)	11 (AR)	11 (TN)
RESIDE ELSEWHERE			
Visit Louisiana	5%	2%	3%
Strongest Competitor	30 (FL)	19 (FL)	28 (FL)
Second-Strongest Competitor	14 (GA)	8 (GA)	9 (GA)
Third-Strongest Competitor	12 (TN)	7 (TN)	9 (TX)

Competitive Spending: Louisiana vs. Nearby States

Trip spending usually hovers near \$500 (Business/Leisure/Day/Overnight)

- Except in Florida, where (\$950) trip spending nearly doubles that of nearby states.
- Louisiana (\$518) places a distant second, with or without transportation costs included.

Average Annual Spending (Q4g): Louisiana vs. Nearby States
Total Spending (Business/Leisure/Day/Overnight) by Travel Party (Total Spending, including 0)

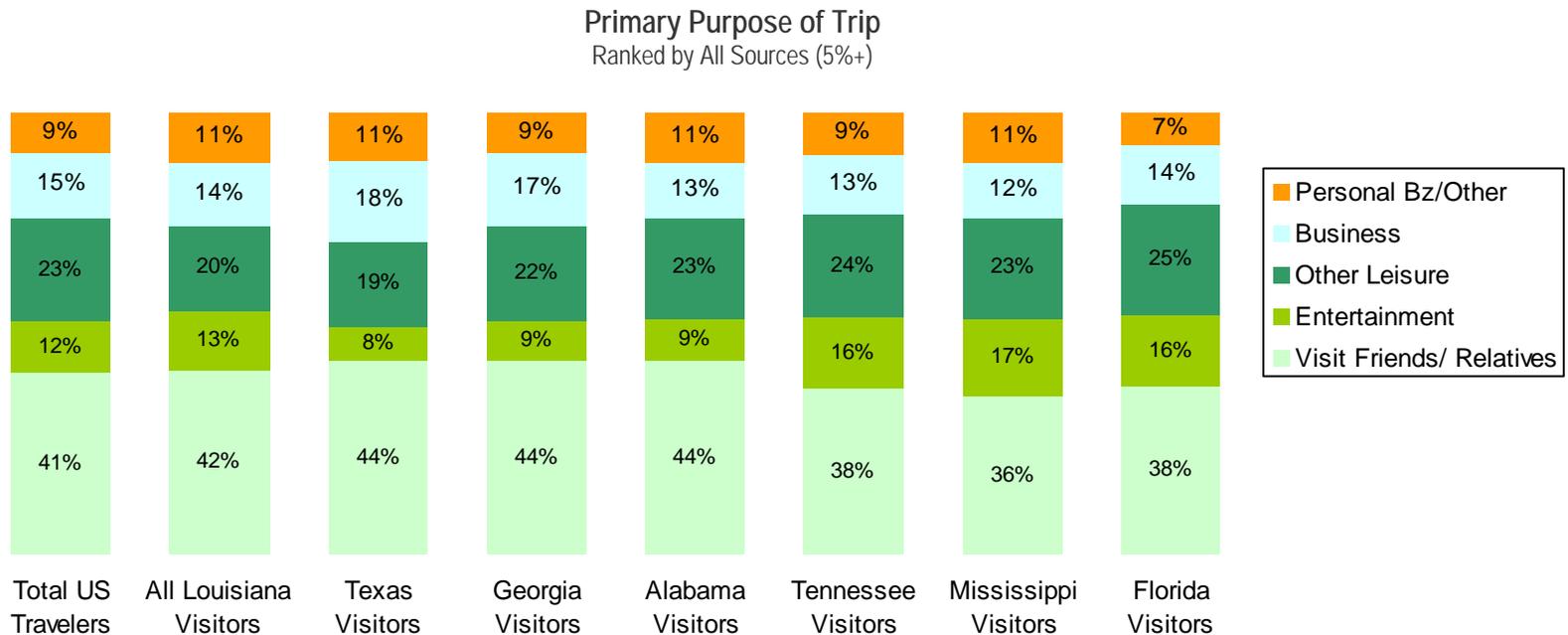


Competitive States: Trip Purpose

Most travelers go for pleasure

Further, they primarily visit friends and relatives. However:

- With two major business centers, Texas visitors often have business in the state. Georgia ranks second among these states for business travel.
- Entertainment attracts a larger proportion of visitors to Mississippi (gaming), Tennessee (Nashville and Dollywood), and Florida (Orlando) than other states. Louisiana places near center.

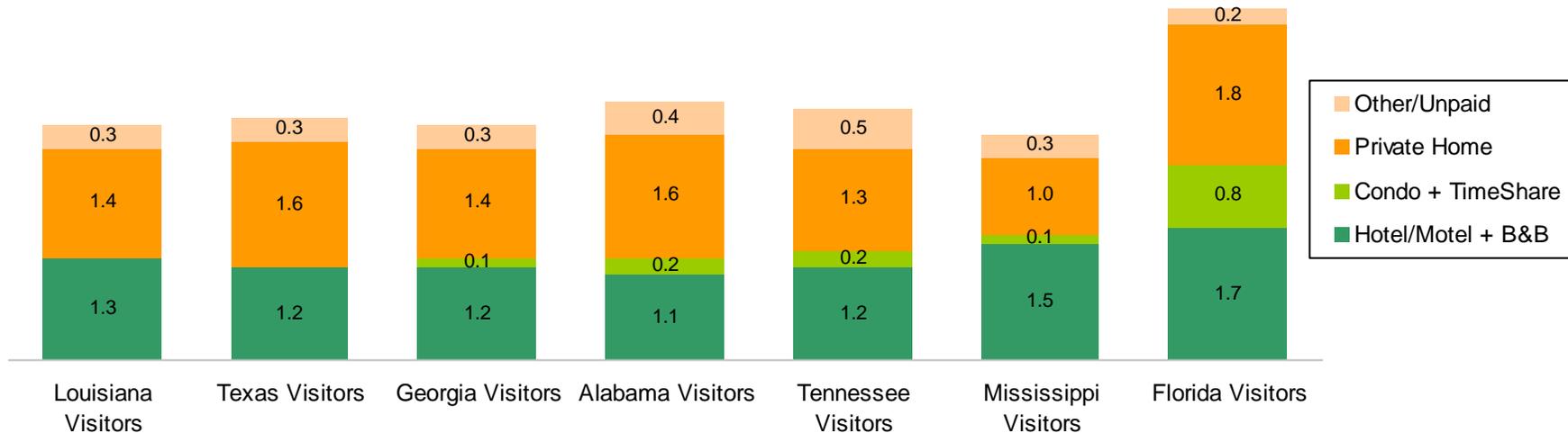


Competitive States: Accommodations and Length of Stay

Somewhat less than half of overnight trips include a stay at a hotel/motel or B&B

- Except for Mississippi (52%), Louisiana gathers somewhat more lodging revenue than competitors – with 43 percent of nights including paid hotel/motel accommodations – in contrast to Texas (38%), Georgia (39%), Alabama (32%), Tennessee (39%), and Florida (37%).
- Alabama visitors are the most likely to stay in a private home.
- Florida visitors diverge from the patterns of other states. Visitors stay longer (4.6 nights), so that although the proportion on nights spent in a hotel/motel place below others, the real count (1.7 nights) is the highest of the group. They also are much more likely to stay in a condo/timeshare than visitors to other states.

Length of Stay
Base: Overnight Visitors



Average # of Nights:

Total	3.0	3.2	3.1	3.4	3.1	2.9	4.6
Paid*	1.3	1.2	1.2	1.1	1.2	1.5	1.7
% Paid/Total	43%	38%	39%	32%	39%	52%	37%

* Hotel/Motel/B&B

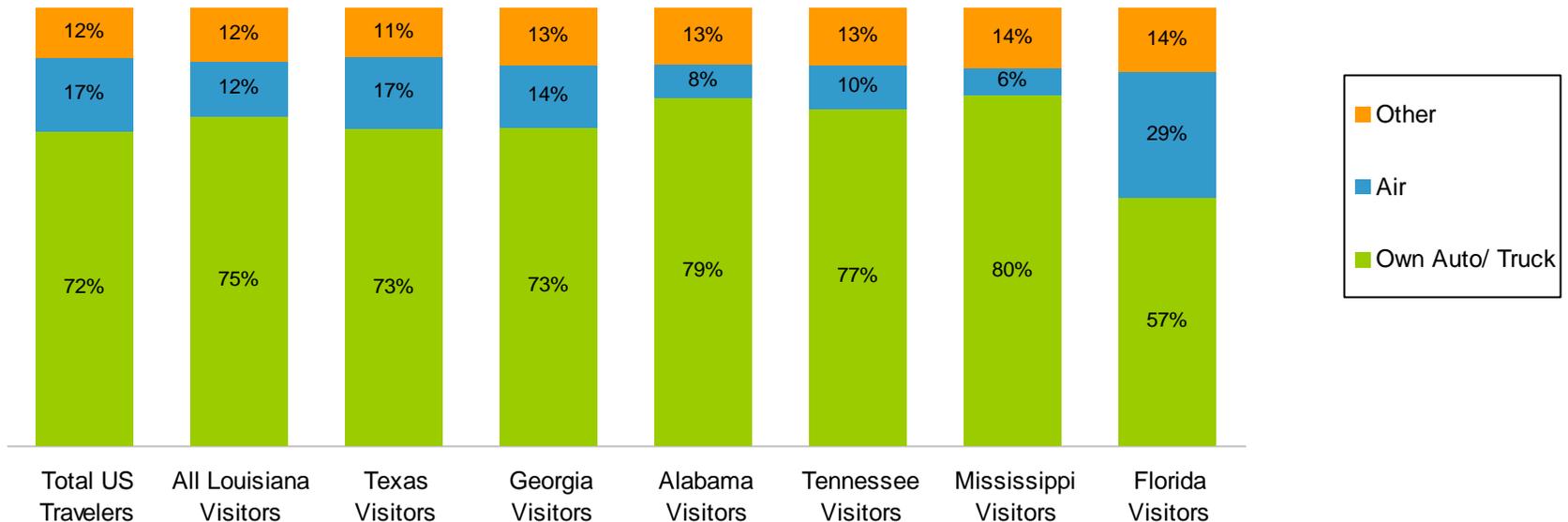
Competitive States: Primary Mode of Transportation

Most travelers drive to their destination

Roughly three-quarters of these states' visitors drive, although exceptions exist:

- Florida visitors are least likely to drive – more than a quarter (29%) of visitors fly.
- Conversely, Alabama and Mississippi visitors are more likely than other state visitors to drive.
- Louisiana places near center.

Primary Mode of Transportation of Louisiana Visitors



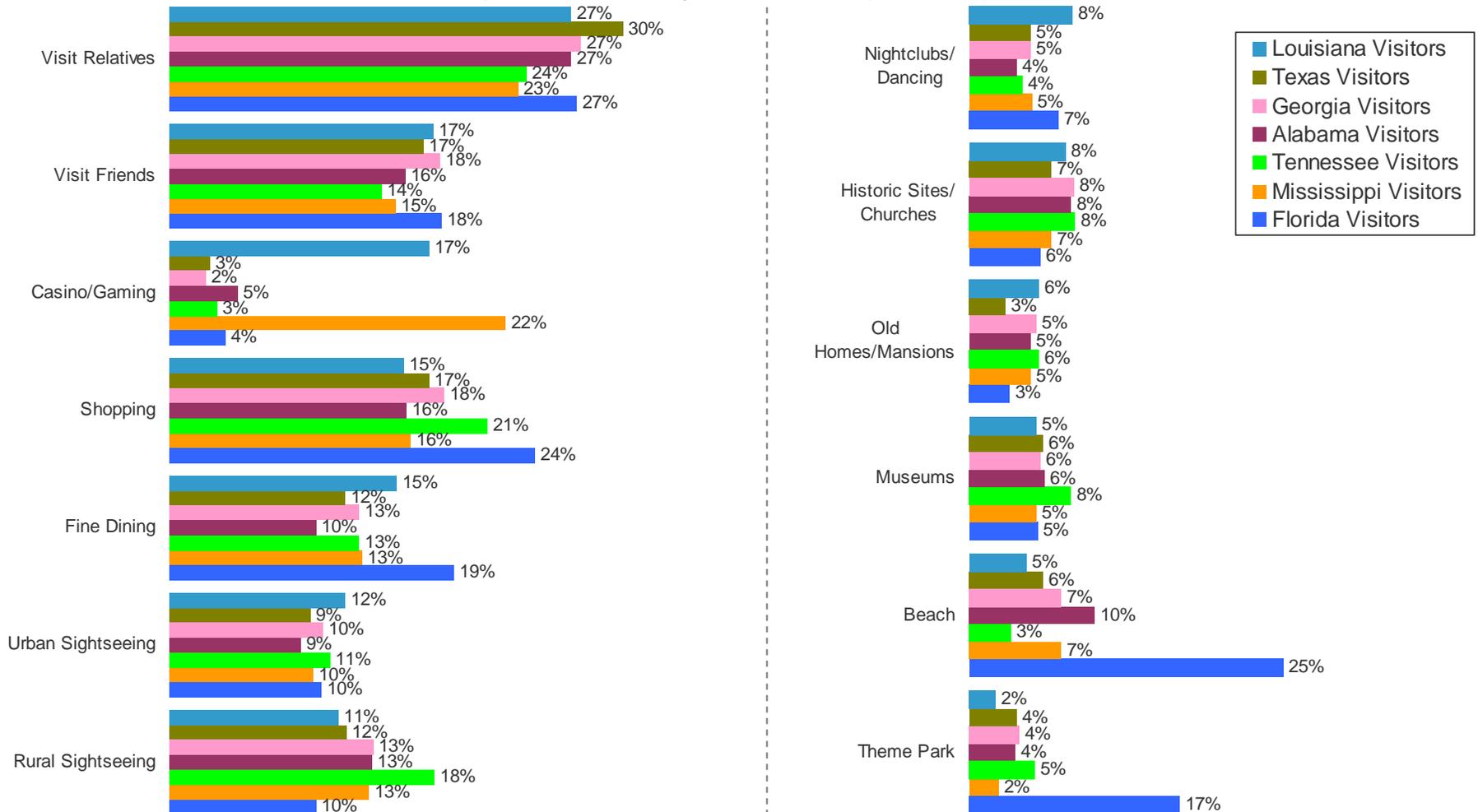
Competitive States: Top 10 Vacation Activities

Top vacation activities/attractions vary substantially by state visited

Louisiana tops other destinations for nightclubs/dancing and urban sightseeing and is very competitive on history, museums, casinos/ gaming, and fine dining. As might be expected, Florida holds a wide lead on theme parks and beaches, and to a lesser degree, for shopping and fine dining. Other states' virtues are illustrated below.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Louisiana Visitors (Top 12 Activities plus Theme Parks)

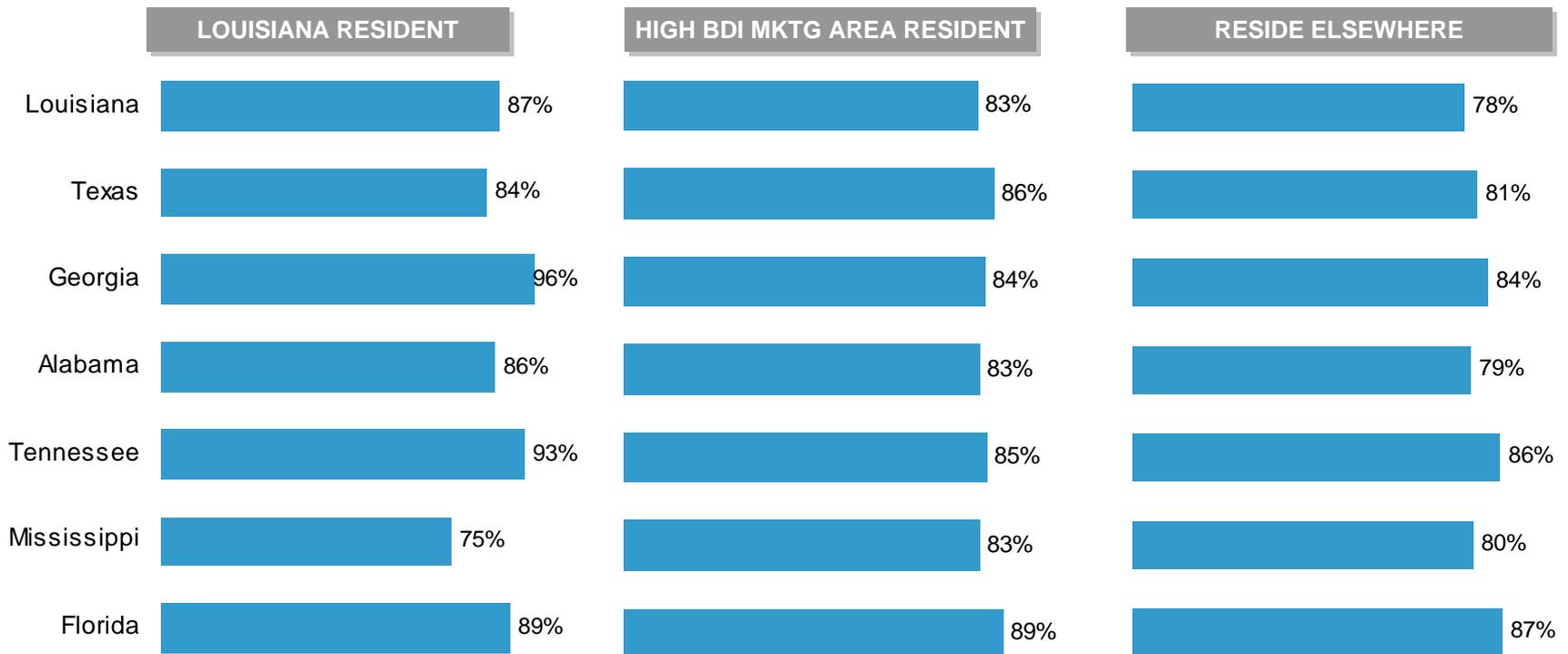


Competitive States: Satisfaction

Louisiana satisfies visitors, but lags several competitors

- **In-state residents** place Louisiana near the center of nearby competitors for satisfaction, exceeding Texas, Alabama, and Mississippi.
- Those living **within the High BDI Marketing Area** rate all the states very similarly, although Louisiana, Alabama, and Mississippi slightly trail the other states.
- Among those **living outside the state and the High BDI Marketing Area**, Louisiana, Alabama, and Mississippi also lag the other competitive states.

Extremely/Very Satisfied With Trip to Region Visited (Far Left)



Export - Import

Export/Import

“Balance of Trade”:

- Louisiana shows a surplus “balance of trade” for tourism.
- Exports substantially exceed imports.
- One in eleven (9%) tourism dollars remain as domestic Louisiana spending.
- Spending that occurs outside the state by non-residents are not included in the chart.



Export represents \$ coming into Louisiana

Import represents \$ leaving Louisiana

Domestic represents \$ staying in Louisiana

Segment Profiles

Mature Visitor Profile

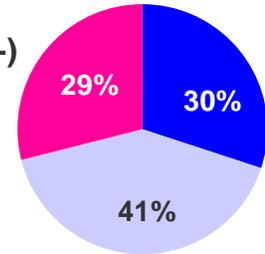
Market Relevance

Nearly a third (29%) of Louisiana's visitors are 55 or older, similar to the US as a whole (30%). Their key characteristics include:

Comparisons shown = (Mature vs. all Louisiana visitors)

By Age (Mature = 55+)

- Under 35
- 35 - 54
- 55+



Demographic Profile:

- Age: By definition, this group is older (64 vs. 45).
- Income: Near, but slightly below average (\$58,900 vs. \$61,000).
- Married: Highest of all segments (67% vs. 60%).
- Household composition: Most likely to live with one other person (53% vs. 35%) and least likely to live with children (8% vs. 36%).
- Ethnicity: Much more likely Caucasian (91% vs. 78%).
- Employment: Most likely to be retired (51% vs. 17%), as expected for this age group.

Trip Profile:

- Purpose: Less likely to visit friends/relatives (36% vs. 42%).
- Length of stay: Somewhat more likely to spend the night (71% vs. 67%); they also stay somewhat longer (3.3 vs. 3.0 nights) and pay for lodging (hotel/motel/B&B) more often (48% vs. 43%).
- Travel Party: Most likely to travel in pairs (49% vs. 36%); least likely to travel in 3+ groups (7% vs. 22%).
- Mode: Usually drive their own car (80% vs. 75%).
- Planning horizon: Almost half (45%) decide to visit Louisiana within two weeks of their trip; similar to other visitors (48%).
- Activity choices: More often gamble (21% vs. 17%) and sightsee rural areas (16% vs. 11%) than others.
- Spending: Exceed the average (\$616 vs. \$518) and allocate more to gaming (35% vs. 21%), consistent with their activity choices.
- Satisfaction with Louisiana: Somewhat more satisfied than average (87% vs. 83%).

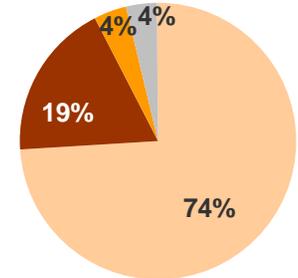
African-American Visitor Profile

Market Relevance

Nearly a fifth (19%) of Louisiana visitors claim African-American heritage, more than twice the proportion of US travelers overall (8%). Their key characteristics include:
Comparisons = (African-Americans vs. all Louisiana visitors)

Ethnicity

- White
- African-American
- Hispanic
- Other



Demographic Profile:

- Age: Much younger than average (37 vs. 45); three-quarters are under 45 (76% vs. 53%).
- Income: Second from lowest of segments reviewed (\$53,300 vs. \$61,000); above only in-state visitors (\$52,400).
- Married: Least likely married (39% vs. 60%), which probably contributes to lower incomes.
- Household composition: Most likely to live in larger (3+ members) households (59% vs. 45%); nearly half (47% vs. 36%) live with children.
- Employment: Most likely to be employed full-time, reflecting their younger ages (67% vs. 59%).

Trip Profile:

- Purpose: Most likely (of segments) to visit friends/relatives (54% vs. 42%).
- Length of stay: More days trips (37% vs. 33%), but stay an average length of time when they do stay overnight (2.9 vs. 3.0 nights). However, they less often pay for lodging (34% vs. 43%), opting to stay with friends/relatives.
- Travel Party: Most likely to travel in a larger (3+) group (29% vs. 22%) and with children (34% vs. 24%).
- Mode: Usually drive their own car (68% vs. 75%), but rent a car twice as often as other travelers (12% vs. 5%).
- Planning horizon: Half (50%) decide to visit Louisiana within two weeks of their trip; similar to other visitors (48%).
- Activity choices: Consistent with their lodging arrangements, African-Americans more often visit relatives (31% vs. 27%), and friends (26% vs. 17%) than other segments. In addition, they are, by far, more likely than others to enjoy nightclubs/dancing (18% vs. 8%).
- Spending: Spend the least (\$390 vs. \$518) of any segment except in-state visitors (\$188).
- Satisfaction with Louisiana: Relatively satisfied with Louisiana, similar to all visitors (85% vs. 83%).

Hispanic Visitor Profile

Caution: Small Sample (35) yields less reliable comparisons

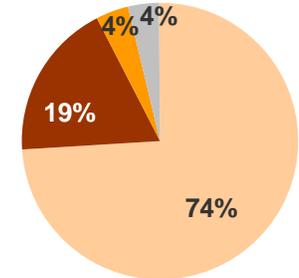
Market Relevance

The smallest segment reviewed, only one in 25 visitors (4%) claim Hispanic heritage, mirroring US travelers overall (4%). Their key characteristics include:

Comparisons = (Hispanics vs. all Louisiana visitors)

Ethnicity

- White
- African-American
- Hispanic
- Other



Demographic Profile:

- Age: Slightly older (47 vs. 45).
- Income: Below average (\$56,300 vs. \$61,000); but above African-American (\$53,300 and in-state visitors (\$52,400).
- Married: Less likely married (51% vs. 60%).
- Household composition: Slightly more than average live with children (40% vs. 36%).
- Employment: Slightly above average indicate full-time employment (63% vs. 59%).

Trip Profile:

- Purpose: Usually pleasure (77% vs. 75%). Less often to visit friends/relatives (36% vs. 42%), more often for entertainment (20% vs. 13%) or to take care of personal business (18% vs. 11%).
- Length of stay: More days trips (36% vs. 33%) and shorter stays when they do stay overnight (2.6 vs. 3.0 nights). However, they more often pay for lodging (54% vs. 43%).
- Travel Party: Near average, they often travel in pairs (33% vs. 36%), in larger (3+) groups (25% vs. 22%), and/or with children (23% vs. 24%).
- Mode: Even more likely to drive their own car (81% vs. 75%) than others.
- Planning horizon: More spontaneous than others (58% vs. 48%) – decide to visit LA within two weeks of their trip.
- Activity choices: More often choose casinos/gaming (26% vs. 17%), fine dining (26% vs. 15%), urban sightseeing (20% vs. 12%), and rural sightseeing (19% vs. 11%) than other segments.
- Spending: Spend the most (\$1,404 vs. \$518) – but based to a small sample, and half (53%) of the spending is on gaming (a preferred activity noted above).
- Satisfaction with Louisiana: Larger than average proportion *extremely satisfied* with Louisiana (51% vs. 46%), but fewer are *very satisfied* (perhaps reflecting gaming losses?).

Appendix



Louisiana's Business Development Index – Top 50

BDI Calculations:

- The Business Development Index is calculated for each DMA to measure the propensity of US residents to take trips to Louisiana compared to the proportion that DMA constitutes of the total population. For example, Hattiesburg-Laurel, MS residents represent 0.098% of all US residents, but 1.019% of total Louisiana visitors.
- Those proportions $1.019/0.098$ (x 100) yields a BDI of 1038. The baseline (100) represents an equal proportion of US households as Louisiana visitors from that DMA.

Louisiana High BDI Index: Results by DMA

DMA of Origin	Total Population	% Population	Louisiana (Person-Trips) Visitors	% Visitors	INDEX
Hattiesburg-Laurel, MS	295,482	0.098%	199	1.019%	1038
Biloxi-Gulfport, MS	349,329	0.116%	229	1.173%	1010
Jackson, MS	924,160	0.307%	572	2.930%	954
Tyler-Longview, TX	698,918	0.232%	334	1.711%	737
Houston, TX	5,809,390	1.930%	2491	12.759%	661
Greenwood-Greenville, MS	224,512	0.075%	94	0.481%	645
Panama City, FL	362,200	0.120%	120	0.615%	511
Beaumont-Port Arthur, TX	458,403	0.152%	106	0.543%	356
Abilene-Sweetwater, TX	308,210	0.102%	60	0.307%	300
Mobile, AL – Pensacola, FL	1,351,043	0.449%	247	1.265%	282
San Antonio, TX	2,252,508	0.748%	383	1.962%	262
Dallas-Ft. Worth, TX	6,655,366	2.211%	1115	5.711%	258
Charlottesville, VA	221,104	0.073%	36	0.184%	251
Victoria, TX	86,143	0.029%	12	0.061%	215
Waco-Temple-Bryan, TX	885,525	0.294%	119	0.610%	207

Louisiana's Business Development Index – Top 50 continued

Louisiana High BDI Index - continued

DMA of Origin	Total Population	% Population	Louisiana (Person-Trips) Visitors	% Visitors	INDEX
Columbus-Tupelo-W. Point, MS	488,785	0.162%	58	0.297%	183
Topeka, KS	441,903	0.147%	52	0.266%	181
Colorado Springs-Pueblo, CO	859,667	0.286%	83	0.425%	149
Jackson, TN	241,854	0.080%	23	0.118%	147
Little Rock-Pine Bluff, AR	1,376,887	0.458%	127	0.650%	142
Austin, TX	1,642,074	0.546%	142	0.727%	133
Memphis, TN	1,786,560	0.594%	145	0.743%	125
Rochester, MN -Mason City, IA	361,693	0.120%	26	0.133%	111
Tallahassee, FL-Thomasville, GA	705,101	0.234%	50	0.256%	109
Rapid City, SD	244,202	0.081%	17	0.087%	107
Ft. Smith-Fayetteville, AR	747,541	0.248%	49	0.251%	101
Atlanta, GA	6,141,281	2.041%	370	1.895%	93
Chattanooga, TN	889,624	0.296%	51	0.261%	88
Gainesville, FL	306,939	0.102%	17	0.087%	85
Wilmington, NC	417,158	0.139%	22	0.113%	81
Oklahoma City, OK	1,699,033	0.565%	89	0.456%	81
Syracuse, NY	1,006,673	0.334%	52	0.266%	80
Orlando-Daytona Beach, FL	3,559,162	1.183%	178	0.912%	77
Reno, NV	711,621	0.236%	35	0.179%	76
Charleston, SC	747,731	0.248%	36	0.184%	74

Louisiana's Business Development Index – Top 50 continued

Louisiana High BDI Index - continued

DMA of Origin	Total Population	% Population	Louisiana (Person-Trips) Visitors	% Visitors	INDEX
Birmingham, AL	1,822,012	0.605%	87	0.446%	74
Ottumwa-Kirksville, IA-MO	129,757	0.043%	6	0.031%	71
Watertown, NY	256,099	0.085%	11	0.056%	66
Nashville, TN	2,454,851	0.816%	105	0.538%	66
Terre Haute, IN	376,153	0.125%	16	0.082%	66
Springfield, MO	1,019,721	0.339%	42	0.215%	63
Dothan, AL	245,451	0.082%	10	0.051%	63
El Paso (Las Cruces), TX-NM	935,810	0.311%	38	0.195%	63
Jonesboro, AR	225,018	0.075%	9	0.046%	62
Huntsville-Decatur (Florence), AL	940,311	0.312%	36	0.184%	59
Macon, GA	631,018	0.210%	24	0.123%	59
South Bend-Elkhart, IN	900,337	0.299%	34	0.174%	58
Norfolk-Portsmouth-Newport News, VA	1,908,939	0.634%	71	0.364%	57
Corpus Christi, TX	568,013	0.189%	21	0.108%	57
Duluth-Superior, MN-WI	420,513	0.140%	15	0.077%	55

Glossary

Term	Definition
Balance of Trade	Net Export-Import (Surplus = +; Deficit = -)
Import	Money departing the state (Louisiana residents vacationing elsewhere)
Export	Money entering the state (Non-Louisiana residents visiting Louisiana)
DMA	Designated Market Area: Counties that share the same primary TV broadcast signals (210 DMAs in US)
Calendar Year	January 1, 2007 through December 31, 2007
In-State	Louisiana
Person-Trip	Total person-trips are all trips taken by all people; i.e. a couple taking three trips counts as six (two people, each taking three trips)
High BDI Marketing Area	DMAs where residents have an above average propensity to visit Louisiana
Respondent/Household Level	Respondent information – one count per respondent
Source of Visitors	Residence of visitors
State/Region Level	Information about all trips taken to a particular state/region (each trip to area counts)
Travel Party	Traveler plus all companions, including children
Trip	Travel 50 miles or more (one-way) away from home or stayed overnight. Excludes commuters or commercial travel (flight attendants, commercial vehicle operator). This may eliminate some leisure day trips that are closer than 50 miles away
Trip Level	Information about all trips – each trip counts
Trip Volume	All trips summed together
FutureView™	TNS' FutureView™ identifies five consumer categories. Of those, "Future Shapers" quickly adopt new products and influence others. They share seven traits: value authenticity/originality, well informed/involved, individualistic, time-poor, socially responsible, curious/open-minded/receptive to new ideas, and advocates of new ideas – they spread the word.
Visitor	Person who has visited Louisiana in the past month; all are US residents, thus, travel is domestic travel only (domestic consumer)
Volunteers/Hurricane Workers	Not explicitly counted; unlikely to be panel respondents during the survey

Research Methods

The research method selected for the syndicated TravelsAmerica study is web based. Sample is selected from the TNS 6th dimension USA Panel with e-mail invitations sent monthly to representative households. TNS constantly strives to keep Internet penetration high and panel fatigue low by carefully monitoring and limiting the number of contacts with each household.

Each potential respondent receives an e-mail request to participate in the study each month. A response rate of 45% is targeted. The field period runs for two weeks each month, usually starting in the middle of the first week.

To enhance relevance, the data are weighted two ways:

- **Demographic weights** adjust respondents by demographic factors such as region, age, income, household size, and marital status to more closely represent the characteristics of the US population
- **Trip and state projection calculations** counts every trip taken by respondents for total trips taken. Detailed information collected for up to three trips in the past month is projected to the actual number of trips taken. In the case of state level calculations, each trip taken in that state counts. A few tables represent person-trips – these take into account the immediate travel party size for each trip as well. For projections, the counts are weighted to reflect the actual US population and total trips.

TNS supervises all fieldwork, editing, coding, and tabulation of the results.

This special report focuses on results for Louisiana. For the calendar year ending December 31, 2007, respondents for key segments in this report are shown below.

CY 2007 Number of Travelers (Unweighted Respondents)	CY 2007 Number of Travelers (Weighted by Demographics)	Region
1,590	1,481	Louisiana Residents
13,514	12,578	High BDI Marketing Area
117,331	109,412	Reside Elsewhere (not Louisiana, not High BDI Mktg Area)
132,435	123,471	Total for TravelsAmerica