

2004
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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TABLE OF CONTENTS

Introduction: Purpose, Source, Definitions.....	1
Executive Summary	2
2004 U.S. Economy and Travel Industry Overview	4
2004 Summary of Domestic Travel in the U.S.	6

2004 SUMMARY OF TRAVEL IN LOUISIANA

Visitor Volume	9
Visitor Volume 1997-2004.....	10
Market Share	11
Visitor Nights	12
Visitor Origins:	
Division of Origin	13
Top States of Origin	14
Top DMAs of Origin	15
DMA/Business Development Index (BDI).....	16
Visitor Demographics (Non-resident Visitors):	
Age	17
Household Size.....	17
Children in Household	18
Marital Status	18
Education.....	18
Employment	19
Income	19
Lifestage	20
PRIZM Clusters.....	21
Summary Table of Visitor Demographics	23
Trip Characteristics (Non-resident Visitors):	
Primary Purpose of Trip.....	24
Length of Stay	25
Travel Party Size and Presence of Children.....	25
Primary Mode of Transportation.....	26
Lodging Use	26
Month and Season of Travel	27
Cities visited.....	27
Trip Activities	27
Spending.....	29
Other States Visited.....	30

TABLE OF CONTENTS continued

Minority Travel:

African-American travel to Louisiana31
Trip Characteristics32

Origin Profiles33

Competitive Comparisons:

Volume Trends39
Purpose of Trip.....40
Transportation Mode40
Trip Duration41
Lodging Use41
Activities42
Competitive States’ Visitors Also Visiting Louisiana on the Same Trip.....43

Appendices:

Survey Methodology A-1
TravelScope Survey Card.....B-1
Glossary of TermsC-1
2004 Economic/Travel Indicators D-1
Profile of Mature Travelers to LouisianaE-1
Business Development Index (BDI) top 50 cities.....F1
City Volume Estimates.....G
PRIZM Cluster Development Index.....G

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 2004. The study has been conducted since 1986-1987 time period.

Purpose

The objectives of this study are to determine:

- the number of visitors to the state,
- the characteristics of trips taken and
- a profile of Louisiana visitors.

Source

Domestic travel information presented in this report is captured via TravelScope[®], a national consumer survey conducted monthly, using National Family Opinion's (NFO) consumer panel of U.S. households. TravelScope is a cooperative research effort, funded by states, cities and other participants and managed by the research department of the Travel Industry Association. Since 1994, TravelScope has collected visitor volume, market share, trip characteristics, and demographics for all U.S. resident travel. For more information on TravelScope, please see the Methodology section of this report.

Definitions

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

The term "household trips" counts trips taken by U.S. households traveling 50 miles or more, one-way, away from home or including one or more overnights spent at the destination. "Household trips" are used in this report to measure travel party size, children on trip, trip spending and demographic data.

The term "person-trips" counts both trips and people per trip. For example, when a family of four takes a trip, this equals one "household trip" and four "person-trips." "Person-trips" are used in this report to measure trip characteristics and state of origin and destination.

Appendix A consists of the survey methodology. Appendix B contains the survey questionnaire. Appendix C consists of a Glossary of Terms. Appendix D includes charts of economic and travel indicators for 2004. Appendix E looks at Mature (households headed by someone age 55+) Louisiana travel compared to Overall Louisiana travel. Appendix G presents the Business Development Index of the top 50 origin cities for Louisiana. Appendix G presents the PRIZM Cluster Development Index. Appendix G displays city volume estimates.

EXECUTIVE SUMMARY

Louisiana visitor volume decreased by 5.9 percent in 2004 over 2003, to 23.6 million person-trips, compared to a 2.1 percent increase in U.S. domestic travel volume overall. In Louisiana, overnight travel decreased 1.1 percent in 2004 over 2003.

- Louisiana hosted 23.6 million visitors in 2004, down 5.9 percent over the prior year. Non-residents generated most Louisiana person-trips (60%). African-American travelers represented 14 percent of all travel in the state, or 3.4 million person-trips.
- Seventy percent of Louisiana visitors spent at least one night in the state (16.5 million). The average duration for overnight visitors was 3.1 nights. Thus, Louisiana experienced an estimated 50.9 million visitor nights in 2004.
- 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 2004 show that Beaumont-Port Arthur, Texas and Tyler-Longview Texas 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.)
- Two out of the six competitive states experienced a growth in travel volume. Georgia (-3.8%) and Alabama (-6.4%) increased more than Louisiana (-5.9%). Tennessee (+2.2%) and Florida (-5.7%) experienced a moderate increase in travel volume. Mississippi (-10.6%) and Texas (+2.2%) travel volumes decreased over 2003.

Non-Resident Visitors

- Sixty percent of Louisiana travelers in 2004 (16.9 million person-trips), were by non-resident travelers. Non-resident visitors generated a total of 42.8 million visitor nights in 2004.
- Over three out of four (78%) non-resident visitors to Louisiana in 2004 traveled to the state for leisure purposes. Twenty-two percent of non-resident visitors traveled for business purposes.
- One in four (25%) non-resident visitors to the state traveled by air. Sixty-eight percent traveled by auto, truck, camper or recreation vehicle (RV), and four percent by rental car as a primary mode of transportation.
- Most non-resident visitors (76%) stayed overnight, and those who did spent an average of 3.3 nights in the state. Almost one in four (24%) visited just for the day.
- Of the 13.2 million non-resident overnight visitors to Louisiana, sixty-nine percent included stays in hotels, motels or bed and breakfast establishments (B&Bs). Twenty-eight percent used private home lodging while visiting the state.
- Shopping (23%) and gambling (21%) were the most popular trip activities, followed by attend a social or family event (15%).
- Non-resident visiting households spent, on average, \$532 per trip in 2004. The highest-spending households came from Florida (\$709). The lowest spenders were from Mississippi (\$350). 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 2004 were:

- More likely to travel for entertainment purposes (20% non-resident LA vs. 15% U.S.) and less likely to travel for outdoor recreation (5% vs. 9%).
- More likely to travel by air (25% non-resident LA vs. 18% U.S.).
- More likely to be on a day-trip (24% non-resident LA vs. 23% U.S.).
- More likely to stay in a hotel, motel or B&B (69% non-resident LA vs. 41% U.S.).
- More likely to participate in gambling (21% non-resident LA vs. 7% U.S.), go city/urban sightseeing (17% vs. 10%), or visit historic places/sites/museums (12% vs. 8%) and less likely to go shopping (23% vs. 30%), attend social/family events (15% vs. 27%), participate in outdoor activities (4% vs. 11%) or visit the beach (2% vs. 9%).
- Spending more per household trip, on average (\$532 vs. \$472).

Compared to Louisiana visitors overall, Louisiana business/convention travelers in 2004 were:

- More likely to travel by air (46% business/convention vs. 19% total).
- More likely rent a car as a secondary mode of transportation (40% business/convention vs. 27% total).
- Staying longer (average length of stay including none 3.6 nights business/convention vs. 3.1 nights total).
- More likely to lodge in hotels, motels, or B&B's (67% business/convention vs. 44% total).
- More like to attend seminars/courses (31% business/convention vs. 7% total) and less likely to go shopping (20% vs. 24%), gamble (7% vs. 17%), visit historic places/sites/museums (8% vs. 10%) or attend social/family events (4% vs. 19%).
- Spending less per household trip, on average including none (\$782 business/convention vs. \$791 total).
- More likely to be employed full-time (89% business/convention vs. 71% total).
- Higher average annual household income (\$84.6K business/convention vs. \$66.9K total).

Compared to Louisiana visitors overall, Louisiana leisure travelers in 2004 were:

- More likely to travel by car/truck/RV/rental car as a primary mode (82% leisure vs. 75% total).
- Less likely to stay in hotels, motels or B&B's (38% leisure vs. 44% total).
- Spending more per household trip, on average including none (\$807 leisure vs. \$791 total).
- More likely to have children under 18 on the trip (26% leisure vs. 21% total).
- More likely to be retired (21% leisure vs. 16% total).
- From households with lower average annual incomes (\$61.3K leisure vs. \$66.9K total).

2004 ECONOMY AND TRAVEL INDUSTRY OVERVIEW

The U.S. economy turned in its best performance in five years in 2004, with real GDP increasing 4.2 percent. Real disposable income and real personal consumption expenditures both rose significantly, 3.4 percent and 3.9 percent, respectively. The U.S. job market also improved during 2004 as annual average total nonfarm employment increased nearly 1.5 million from 2003 to 131.5 million. This reduced the national unemployment rate to 5.5 percent, one-half point lower than in 2003. The travel industry itself added 72 thousands jobs in 2004 as compared to 2003. The Consumer Price Index (CPI), an indicator of the level of price inflation, remained relatively moderate—up 2.7 percent in 2004, while TIA's Travel Price Index increased 4.5 percent during the same period, primarily due to a significant increase in the price of gasoline. The total U.S. current account deficit rose to a record high of \$666 billion in 2004. The U.S. travel industry, however, generated a \$5.8 billion trade surplus for the country in 2004.

U.S. Travel Volume in 2004

In 2004, traveling households residing in the contiguous 48 states generated 1.164 billion person-trips and 663.5 million household trips. U.S. domestic person-trip volume was up 2.1 percent in 2004 year-over-year. Household trip volume rose 3.1 percent. U.S. domestic leisure travel grew 1.6 percent in 2004 over 2003. Overall, business travel began to rebound after five years of decline, increasing 4.3 percent over 2003. Auto travel was up 0.6 percent over 2003. Air travel posted a significant increase of 9.3 percent over that time.

Travel Expenditures in 2004

Domestic travelers spent more than \$524.4 billion in the U.S. during 2004, an increase of 6.8 percent over 2003. International traveler expenditures in the U.S., excluding spending on international airfares purchased outside the U.S., increased more than twice as much, up 15.9 percent to total \$74.8 billion in 2004.

Comparing the 2004 overall Travel Price Index (TPI) with 2003 shows that the cost of travel grew at a higher rate than the Consumer Price Index over the same period (+4.5% vs. +2.7%). Motor fuel prices increased the most (+18.1%) in 2004, followed by the overall cost of transportation (+7.0%) and intracity public transportation fares (+5.9%). Airline fares continued to decline (-1.8%), along with other intercity transportation prices (-2.4%). Lodging costs increased (+5.2%). Recreation services (+1.0%) and food and beverage (+3.0%) prices continued to show modest increases.

Over the past decade, travel prices have risen more than consumer prices overall. Comparing TIA's 2004 TPI with that of 1994 shows that the cost of travel increased at a greater rate than did the Consumer Price Index over the same time frame (+33.3% vs. +27.3%). While TIA's 2004 overall TPI of 210.2 rose 33.3 percent over 1994, motor fuel prices (+62.0%) showed the largest increase out of the eight travel price measures. The next largest increases in prices over 1994 were for the overall cost of transportation (+38.5%), intracity public transportation (+36.7%), and lodging (+35.7%). Other intercity transportation is the only measure that showed a decline during this time (-4.3%).

Travel Employment in 2003-04

Nearly 1.5 million jobs were added to the non-farm sector of the strengthening U.S. economy in 2004, a 1.1 percent up from 2003, according to the U.S. Bureau of Labor Statistics (BLS). This reduced the national unemployment rate fell to 5.5 percent from 6.0 percent in 2003. Employment generated by domestic and international traveler spending in the U.S. increased 1.0 percent during 2004.

Examining just employment related to domestic travel expenditures, the greatest gain occurred in the entertainment/recreation sector, with employment up 1.1 percent. Employment related to auto transportation and lodging increased 0.8 percent each in 2004. Employment generated by domestic travel in the travel planning sector (i.e., the travel agent and travel arrangement industry), however, declined 4.1 percent in 2004, the most severe decline among all travel industry sectors. Employment in the public transportation sector (composed primarily of the airline industry) continued to decline as well, down 2.3 percent from 2003.

2004 SUMMARY OF DOMESTIC TRAVEL IN THE U.S.

An estimated 1,163.9 million domestic person-trips were taken by U.S. residents in 2004

Overall U.S. travel volume increased 2.1 percent over 2004

The majority (82%) of person-trips in 2004 were for leisure purposes (visiting friends or relatives, outdoor recreation, entertainment/sightseeing and other pleasure/personal reasons). Within leisure trips, visiting friends/relatives is the most common reason for traveling.

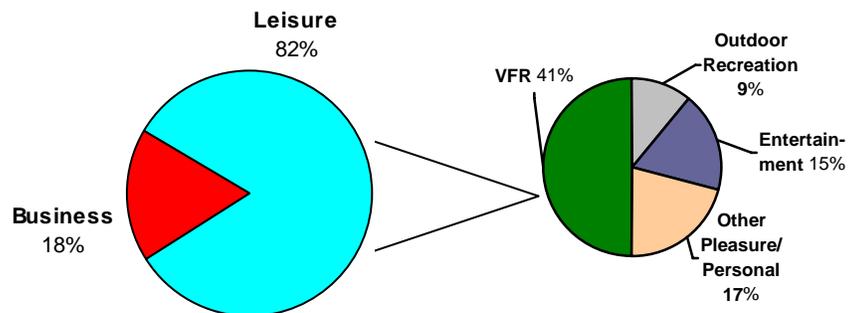
Travel for business purposes accounted for 18 percent of all U.S. person-trips. Business travel volume declined by 1.0 percent compared to 2003.

Most U.S. travel is by auto (79%) in 2004. Air travel accounted for 16 percent in 2004, and other modes of transportation accounted for five percent.

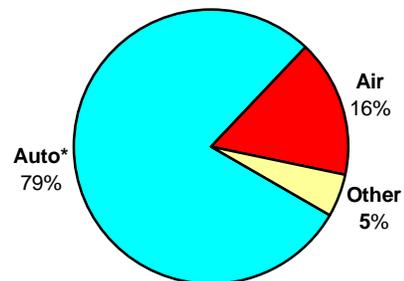
Other Characteristics of the Average U.S. Trip:

- 24 percent of trips include children under 18.
- The average trip duration is 3.1 nights. The average overnight trip duration is 4.3 nights.
- 40 percent of overnight U.S. trips include lodging in a hotel, motel or B&B.
- 31 percent of overnight U.S. trips include lodging in a private home.
- The average expenditure per trip is \$433, not including transportation to the destination.
- The most popular trip activities on the average U.S. trip are:
 - shopping (31%);
 - attending social/family events (27%);
 - outdoor activities(11%);
 - city/urban sightseeing (10%);
 - rural sightseeing (10%);
 - go to the beach (9%);
 - visiting historic places, sites, museums (8%);
 - gambling (7%);
 - going to theme/amusement parks (7%); and
 - visiting national/state parks (7%).

2004 Primary Purpose of Trip

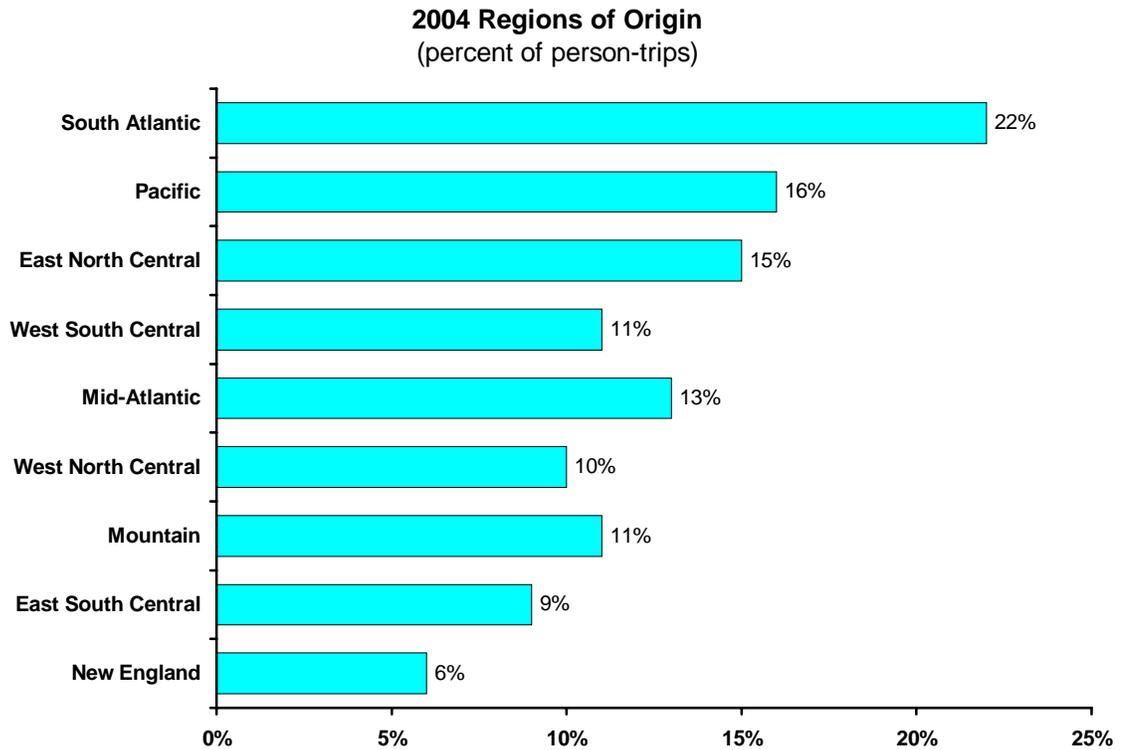


2004 Primary Mode of Transportation



Census Division of Origin

One in five (22%) U.S. domestic travelers originated in the South Atlantic division. The Pacific and East North Central divisions accounted for 16 percent and 15 percent of person-trips, respectively. According to the U.S. Census, these are also the most populous divisions in the U.S.



2004

TravelScope® Profile
of U.S. Travelers
to Louisiana

VISITOR VOLUME

	<u>No. of Visitors (in person-trips)</u>	<u>Percent of Trip Spent in Louisiana***</u>
Total U.S.	1,163,938,000	not applicable
Total Louisiana	23,647,000	<u>61%</u>
Non-resident visitors	16,975,000	60%
Non-resident African-American visitors	2,483,000	66%
Resident travelers	6,672,000	72%
Louisiana Cities*		
New Orleans		67%
Resident	864,000	
Non-resident	8,437,000	
Shreveport		55%
Resident	501,000	
Non-resident	2,413,000	
Baton Rouge		62%
Resident	735,000	
Non-resident	1,460,000	
Lake Charles		64%
Resident	291,000	
Non-resident	1,324,000	
Lafayette		94%
Resident	469,000	
Non-resident	1,007,000	
Monroe**		42%
Resident	331,000	
Non-resident	371,000	
Alexandria**		94%
Resident	295,000	
Non-resident	251,000	

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

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

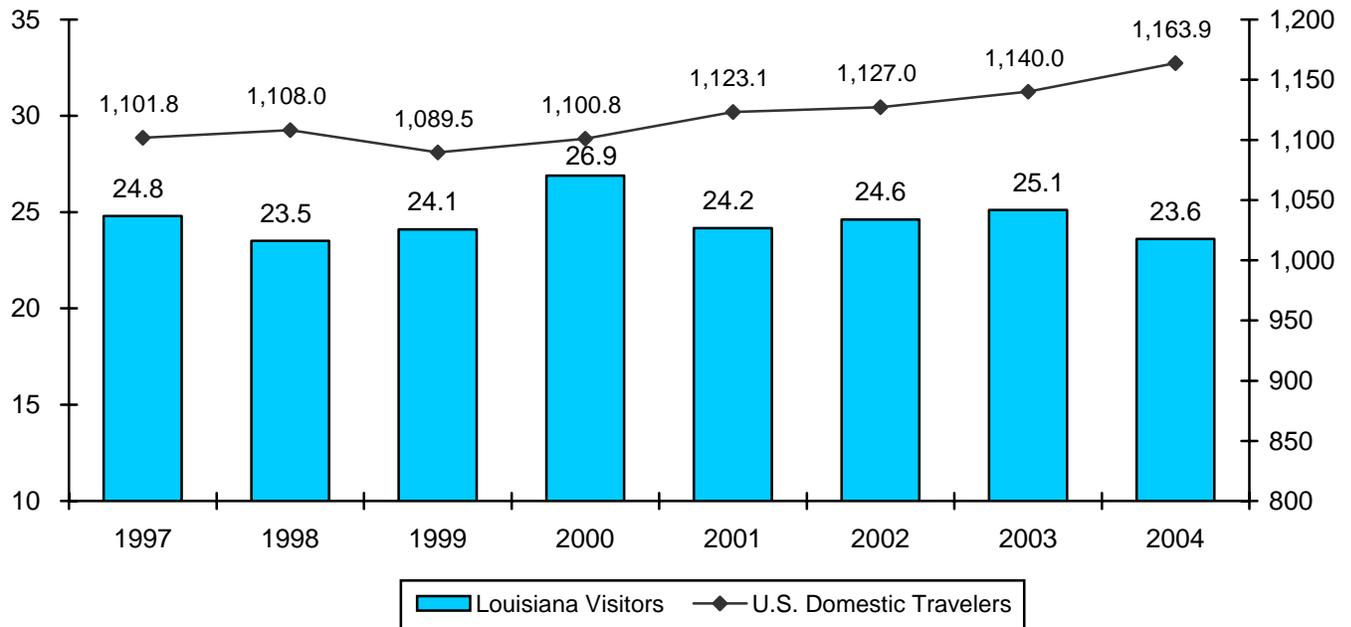
***Calculated by dividing trip duration within Louisiana by total trip duration.

Visitor Volume 1994-2004

Over 23 million travelers visited Louisiana in 2004, a decrease of 5.9 percent over 2003. In comparison, U.S. domestic travel volume increased 2.1 percent in 2004 over 2003.

2004 Travel to Louisiana by Quarter (in millions of person-trips)

U.S. and Louisiana Volume Trends 1997-2004 (in millions of person-trips)



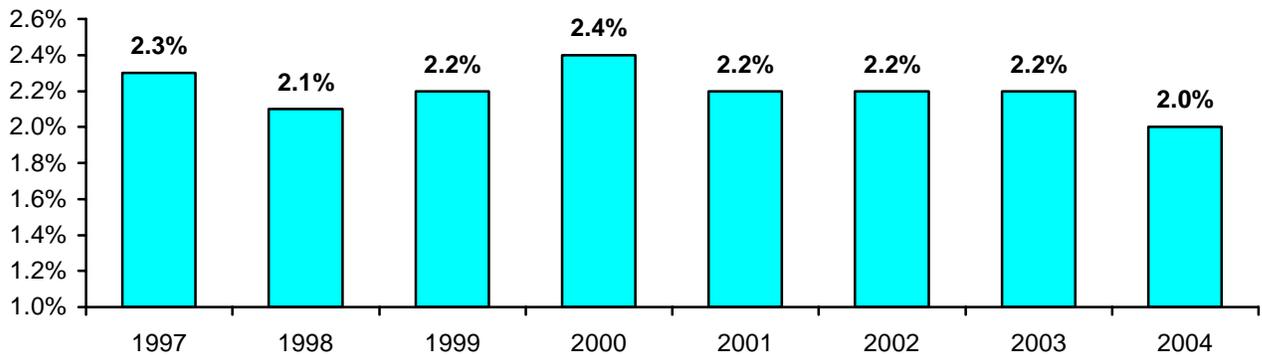
	National Travel Volume	Louisiana Travel Volume
1 st quarter	221.2	5.9
2 nd quarter	305.5	5.9
3 rd quarter	349.2	5.8
4 th quarter	288.0	6.0
TOTAL	1,163.9	23.6

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

Market Share

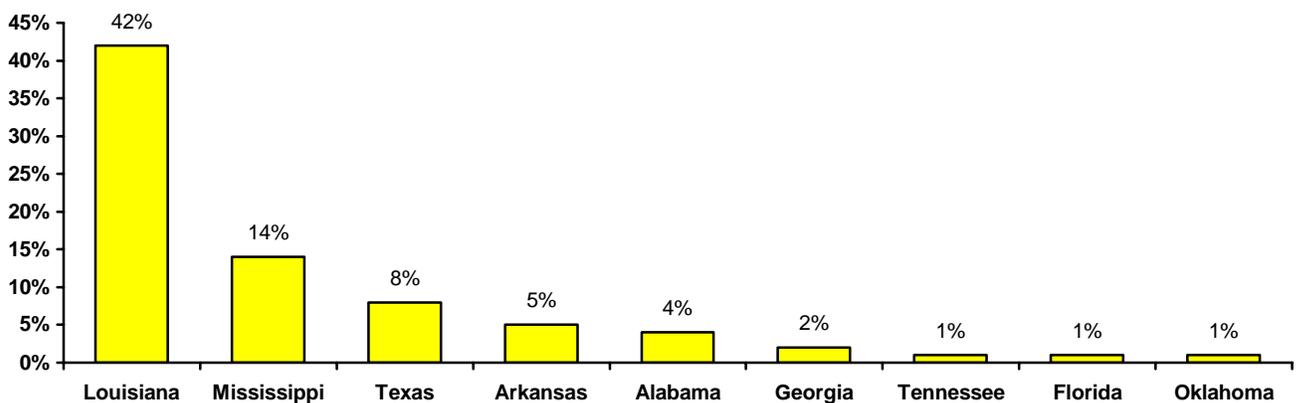
Louisiana had a 2.0 percent share of overall U.S. domestic travel volume in 2004.

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



Narrowing down to a regional focus, it becomes clear that Louisiana draws a much higher proportion of person-trips from several neighboring states. Of all person-trips *originating* in Louisiana in 2004, 42 percent included at least one in-state destination on their trip. Fourteen percent of Mississippi travelers visited Louisiana when they traveled in 2004 and eight percent of person-trips originating in Texas included Louisiana. Five percent of travelers from Arkansas and four percent from Alabama visited Louisiana.

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

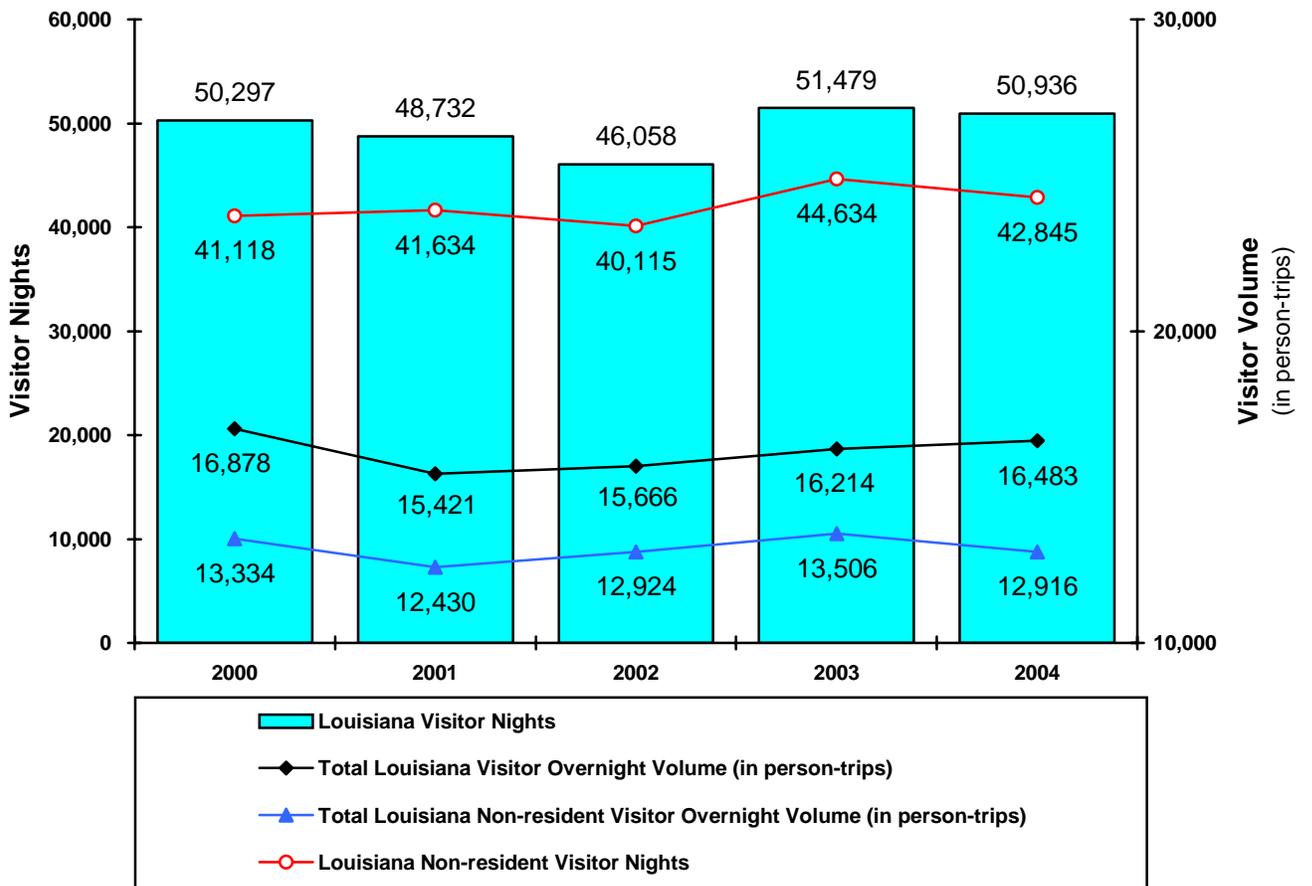


Visitor Nights

Of person-trips to Louisiana, 70 percent or 16.5 million included at least one night in the state. The average stay for an overnight visitor was 3.1 nights. This translates into an estimated 50.9 million visitor nights, a 1.1 percent decrease from 2003.

Non-resident travelers represent 84 percent of visitor nights in Louisiana. The volume of visitor nights by non-resident visitors decreased by four percent over 2003 to 42.8 million nights.

Louisiana Visitor Overnight Volume and Visitor Nights Trends 1998-2004 (in thousands)

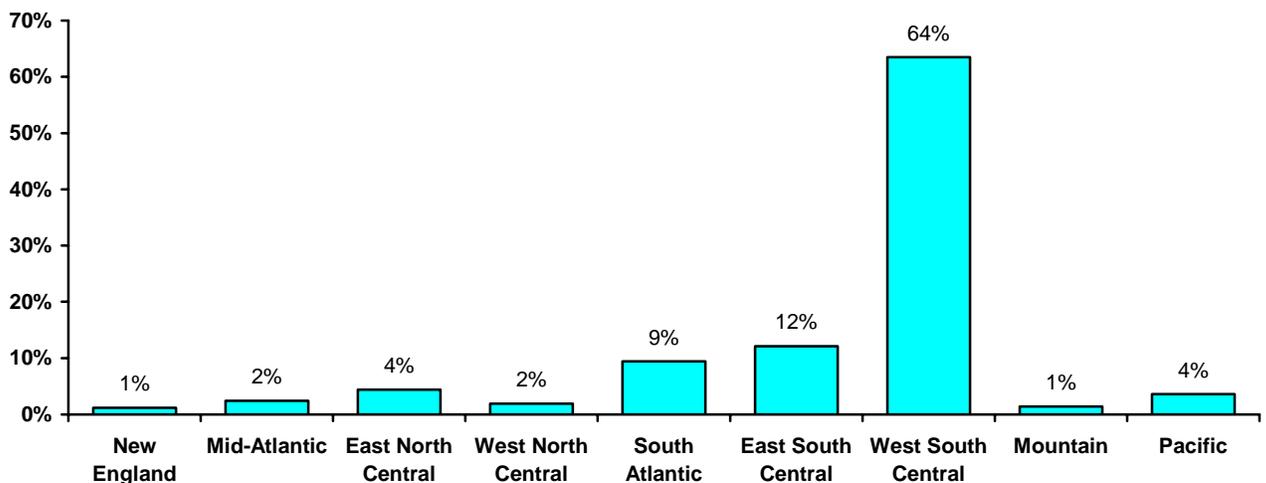


VISITOR ORIGINS

Division of Origin

Almost two thirds of Louisiana person-trips (64%) originated in the West South Central division, which is comprised of Louisiana, Arkansas, Oklahoma and Texas. The East South Central and South Atlantic divisions also contributed significant visitor volume, providing a total of 21 percent of Louisiana person-trips. The South Atlantic division includes Florida, Georgia, Virginia, North Carolina, Maryland, South Carolina, Delaware and West Virginia. The East South Central division includes Mississippi, Alabama, Tennessee and Kentucky. No other census division accounted for greater than five percent of person-trips to the state.

2004 Louisiana Visitors Division of Origin
(percent of person-trips)

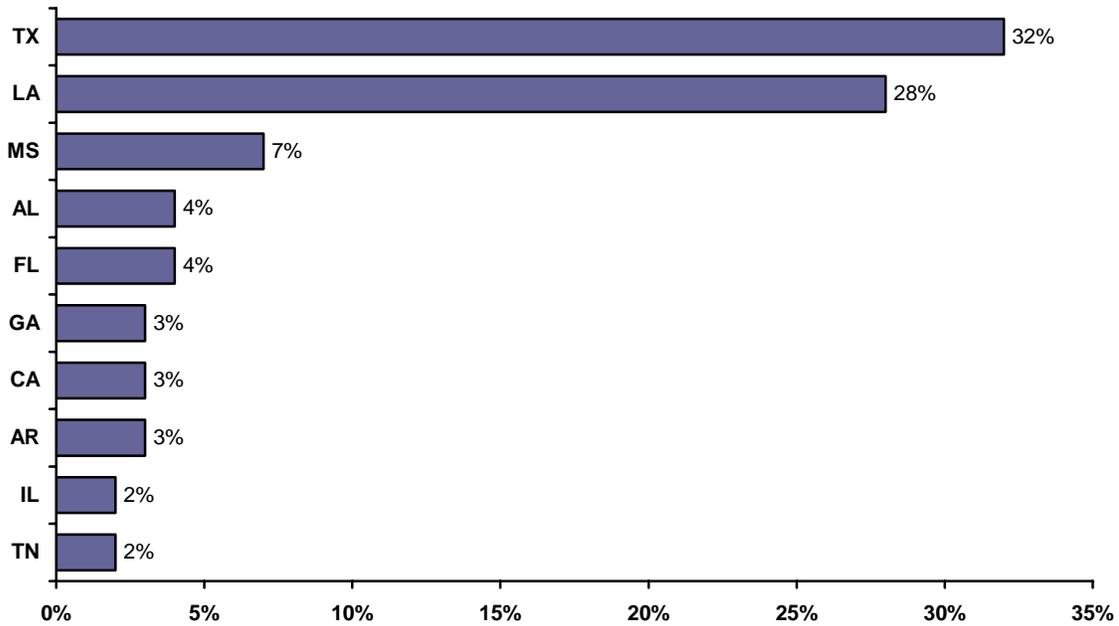


Divisional travel volume to Louisiana is often driven by just a few states. Half (50%) of the travel volume to Louisiana from the West South Central division in 2004 came from visitors originating in Texas. Another 44 percent of person-trips from the West South Central division were Louisiana residents traveling within the state. Comparatively little volume came from the other two states in the region, Arkansas (3%) and Oklahoma (<1%). East South Central visitors were primarily from Mississippi (54%) and the majority of South Atlantic visitors originated in Florida (40%) or Georgia (33%). Just over three quarters (77%) visitors from the Pacific division originated in California.

Top States of Origin

Texas remains the top origin market for Louisiana by a significant margin. Texas residents generated a third (32%) of person-trips to Louisiana in 2004. Louisiana was the second largest source of state travel, as a quarter (28%) of person-trips originated within the state. Other states providing three percent or more of visitor volume to Louisiana in 2004 include Mississippi (7%), Florida (4%), Alabama (4%), California (3%) and Arkansas (3%).

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 2004, 11 percent of person-trips to Louisiana originated from Houston. Another nine percent originated from Dallas–Fort Worth.

Top Advertising Markets of Origin for 2004 Louisiana Visitors (in person-trips)						
	TOTAL		LEISURE		BUSINESS/ CONVENTION	
	Volume	Share of LA Travel	Volume	Share of LA Travel	Volume	Share of LA Travel
Houston	2,574,000,	11%	1,961,000,	11%	431,000,	10%
Dallas – Fort Worth	2,009,000,	9%	1,529,000,	8%	470,000,	11%
Austin	624,000,	3%	509,000,	3%	66,000,	2%
Atlanta	566,000,	2%	463,000,	3%	100,000,	2%
Beaumont-Port Arthur	560,000,	2%	518,000,	3%	5,000,	*
Jackson, MS	506,000,	2%	472,000,	3%	15,000,	*
Waco-Temple-Bryan	482,000,	2%	476,000,	3%	6,000,	*
Chicago	460,000,	2%	413,000,	2%	47,000,	1%
Little Rock – Pine Bluff	455,000,	2%	374,000,	2%	81,000,	2%
Tyler – Longview, TX	450,000,	2%	345,000,	2%	73,000,	2%
Mobile – Pensacola	436,000,	2%	333,000,	2%	76,000,	2%
San Antonio	421,000,	2%	421,000,	2%	-	-

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

Less than 0.5%.

Leisure and Business /Convention do not add to total, since Combined Business/Pleasure is not included.

DMA/Business Development Index (BDI)*

Based on data from 2000-2004, Beaumont-Port Arthur, TX and Tyler-Longview, TX residents have the highest propensity to travel to Louisiana, with BDI indices of 1139 and 951.

**2003-2004 Business Development Index (BDI) for
Out-of-state Louisiana Markets**

<u>City (DMA) of Origin</u>	<u>Index</u>
Beaumont-Port Arthur, TX	1139
Tyler-Longview (Lufkin & Nacogdoches), TX	951
Waco-Temple-Bryan, TX	766
Jackson, MS	765
Hattiesburg-Laurel, MS	751
Houston, TX	705
Biloxi-Gulfport, MS	696
Dallas-Ft. Worth, TX	447
Mobile-Pensacola (Ft. Walton Beach), AL-FL	444
Austin, TX	409
Little Rock-Pine Bluff, AR	399
Meridian, MS	249
Birmingham (Anniston, Tuscaloosa),AL	246
Columbus-Tupelo-West Point, MS	244
Abilene-Sweetwater, TX	240

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

* The Business Development Index is calculated for each city to measure the propensity of U.S. households to take trips (measured by household trips) compared to the share of total households. For example, Beaumont-Port Arthur, TX households make up 0.16 percent of U.S. households, yet they take 1.80 percent of domestic household trips to Louisiana, creating a Business Development index of 1139. 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 2003-2004. For a more complete chart, please see Appendix F.

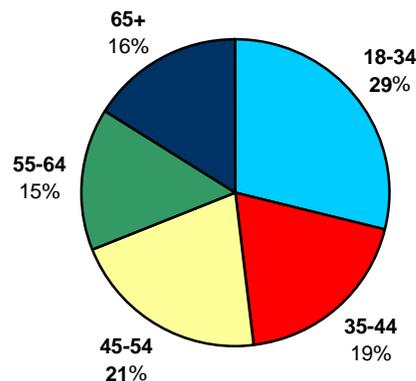
VISITOR DEMOGRAPHICS (Non-resident Visitors)

The demographic characteristics of non-resident visitors to Louisiana are examined in this section. Demographic information is based on the head of the traveling household. (Note: Someone other than the head of household may have also been in the travel party.) See page 25 for a summary chart of demographic variables.

Age

Non-resident Generation X and Y households, those aged 18-34, accounted for 29% of trips to Louisiana in 2004. Nineteen percent of trips were taken by Baby Boomer households between 35 and 44 years old, and 21 percent of household trips involved Baby Boomer travelers between 45 to 54 years of age. Thirty-one percent of household trips to Louisiana were taken by mature travelers, aged 55 years or older. The market share of (29%) of Generation X and Y non-resident households who traveled in Louisiana tracks with the U.S. (29%).

Age of Louisiana Visitors in 2004
(percent of non-resident households)



Average
Age: 47

Household Size

Twenty-five percent of non-resident households visiting Louisiana in 2004 were single-person households. Over half (54%) included two or three members (37% two-member, 17% three-member). Twenty-one percent of non-resident visiting households included four or more members.

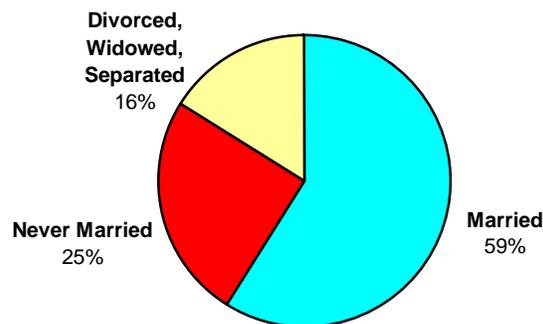
Children in Household

Thirty percent of non-resident trips to Louisiana were taken by households with children. In visiting households with children, there was an average of 1.8 children in the household. Thirteen percent of non-resident visiting households had just one child in the home, while 17 percent had two or more children.

Marital Status

A majority (59%) of non-resident trips to Louisiana were taken by married households. One in four (25%) were taken by those who never married, and 16 percent by those who are divorced, widowed or separated.

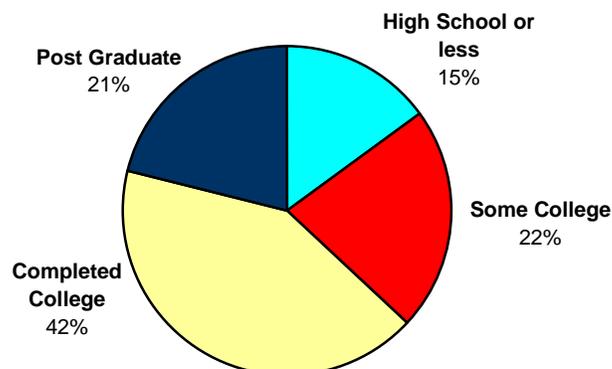
Marital Status of Louisiana Visitors in 2004
(percent of non-resident households)



Education

A majority (63%) of non-resident trips to Louisiana were taken by households headed by someone with a college degree (42%) or who had done some post graduate work (21%). One in five (22%) trips were generated by households headed by someone with some college education. In 15 percent of visiting households, the head of household had a high school education or less. Resident visitors were more likely than non-resident visitors to have a high school education or less (28% vs. 15%).

Education of Louisiana Visitors in 2004
(percent of non-resident households)



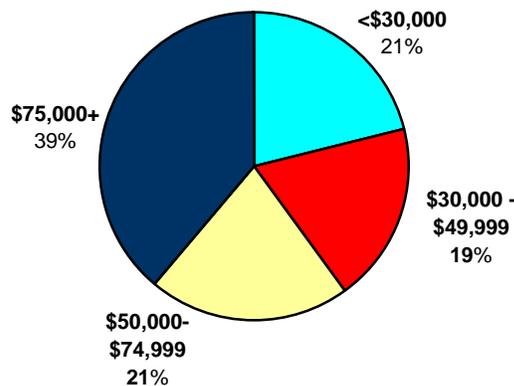
Employment

Seventy-five percent of non-resident households visiting Louisiana in 2004 were employed full-time. Four percent were employed part-time and five percent were unemployed. Sixteen percent of non-resident households visiting Louisiana in 2004 were retired.

Income

The average annual income of non-resident households visiting Louisiana was \$71,800 in 2004, slightly higher than the average for U.S. traveling households (\$70,300). Among non-resident households taking Louisiana trips in 2004, 21 percent had annual incomes below \$30,000, 19 percent had incomes between \$30,000 and \$50,000, 21 percent had incomes between \$50,000 and \$75,000, and 39 percent had incomes of \$75,000 or more.

**Average Annual Household Income
of Louisiana Visitors in 2004**
(percent of non-resident households)



Average (mean) income = \$71,800

Lifestage

Non-resident households taking trips to Louisiana most often (38%) reflected the Parents lifestage. Couples accounted for 33 percent of non-resident visiting households. Singles accounted for 25 percent of Louisiana trips, and roommates four percent.

Resident households traveling in Louisiana in 2004 most often reflected by Older Parents, Young Parents, Working Older Couples and Young Singles. (See Appendix C for definitions of Lifestage groups.)

Lifestage of Louisiana Visitors in 2004 (percent of non-resident household trips)

<u>Singles</u>	25%
Young Singles	14%
Middle Singles	6%
Older Singles	5%
<u>Couples</u>	33%
Young Couple	11%
Working Older Couple	14%
Retired Older Couple	8%
<u>Parents</u>	38%
Young Parent	14%
Middle Parent	7%
Older Parent	17%
<u>Roommates</u>	4%

PRIZM Clusters*

PRIZM is a geodemographic neighborhood segmentation system developed from U.S. census demographic data. Households are grouped into “clusters” that exhibit similar demographic and behavioral characteristics. Six categories of variables explain most of the differences between clusters and social groups: Social Rank (including income and education), Household Composition, Mobility, Ethnicity, Urbanization and Housing. Individual clusters are organized into 14 distinct social groups. (See appendix C, Glossary of Terms, for more detailed descriptions of the above social groups and clusters.)

Households from the Landed Gentry social group generate the largest share of non-resident trips to Louisiana. About 15 percent of non-resident trips to Louisiana in 2004 were taken by households in this social group. These are high education, high income households in mostly white-collar professions. Another 12 percent of trips to Louisiana in 2004 were taken by households in the Country Comfort social group that are mostly from mid-scale, middle density, satellite cities around major metropolitan areas or smaller cities. More than 10 percent of trips to Louisiana in 2004 were also taken by households in the 2nd City Society social group, the wealthy well-educated professionals found in second tier cities. Just under 10 percent of non-resident trips are generated by the Affluentials social group. This social group is comprised of solid middle income households residing in the suburbs.

Top PRIZM Social Groups

(Percent of 2004 non-resident Louisiana household-trips)

<u>Group</u>	<u>Percent</u>
Landed Gentry	14.5%
Country Comfort	12.0%
2 nd City Society	10.2%
The Affluentials	9.4%

The top clusters traveling to Louisiana in 2004 predominately involved moderately-high to high-income households, and represented a range of urbanization levels. Upward bound, from the 2nd City Society social group was the largest cluster accounting for 5.9% of non-resident household trips to Louisiana.

Top PRIZM Clusters

(Percent of 2004 non-resident Louisiana household-trips)

<u>Cluster</u>	<u>Percent</u>	<u>Social Group</u>
Upward Bound	5.9%	2 nd City Society
Fast-Track Families	4.8	Landed Gentry
Big Sky Families	4.6	Country Comfort
Country Squires	4.0	Landed Gentry
New Homesteaders	3.9	Country Comfort
Kids & Cul-de-Sacs	2.8	The Affluentials
Brite Lites, Li'l City	2.6	2 nd City Society
Blue Blood Estates	2.5	Elite Suburbs
Big Fish, Small Pond	2.5	Landed Gentry
Bohemian Mix	2.5	Urban Uptown

Five of the top 10 clusters for travel potential to Louisiana are also in the top 10 list by volume of visiting households (Upward Bound, Big Sky Families, New Homesteaders, Blue Blood Estates, and Bohemian Mix).

2004 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
PARK BENCH SENIORS	5,124	0.77%	191	1.81%	19	234
UPWARD BOUND	17,365	2.62%	623	5.90%	1	226
BIG SKY FAMILIES	15,598	2.35%	483	4.57%	3	195
AMERICAN CLASSICS	4,480	0.68%	125	1.19%	35	176
CROSSROADS VILLAGERS	7,493	1.13%	199	1.89%	18	167
BLUE BLOOD ESTATES	10,248	1.54%	266	2.52%	8	163
CITY ROOTS	3,212	0.48%	81	0.77%	49	158
MOBILITY BLUES	5,854	0.88%	143	1.35%	30	153
BOHEMIAN MIX	10,947	1.65%	262	2.48%	10	150
NEW HOMESTEADERS	17,784	2.68%	410	3.88%	5	145

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

Summary Table of Visitor Demographics

TRAVELING HOUSEHOLD DEMOGRAPHICS (household trips)	Total U.S.	Louisiana, 2004				
		Total Louisiana	Resident	Non- Resident	Leisure	Bus/Conv.
Age of Household Head						
18-34	29%	29%	29%	29%	30%	25%
35-54	41	39	37	40	37	48
55+	30	32	34	31	33	27
Average (mean) age	46 years	47 years	47 years	47 years	47 years	45 years
Household Size						
One person	22%	24%	22%	25%	24%	23%
Two people	35	35	29	37	34	36
Three people	17	18	22	17	19	16
Four people	16	14	13	14	14	16
Five or more people	10	9	14	7	9	9
Children in Household						
None	66%	69%	67%	70%	70%	68%
One	15	14	15	13	14	14
Two	13	11	9	12	10	13
Three or more	6	6	10	5	6	5
Mean (excluding none)	1.8	1.8	2.0	1.8	1.8	1.8
Marital Status						
Married	62%	58%	53%	59%	56%	63%
Never married	23	26	30	25	27	23
Divorced, Widowed, Separated	15	16	17	16	17	14
Education						
High school education or less	18%	18%	28%	15%	21%	9%
Some college – no degree	23	23	24	22	27	15
Completed College	39	38	29	42	36	43
Post graduate work	20	21	19	21	16	33
Employment						
Full-time	73%	71%	60%	75%	65%	89%
Part-time	7	6	11	4	7	3
Retired	14	16	17	16	21	4
Not employed	6	7	12	5	7	3
Annual Household Income						
Less than \$30,000	21%	22%	26%	21%	25%	14%
\$30,000-\$49,999	21	21	29	19	23	15
\$50,000-\$74,999	21	22	23	21	23	21
\$75,000 or more	37	35	22	39	30	50
Mean	\$70,300	\$66,900	\$53,300	\$71,800	\$61,300	\$84,600

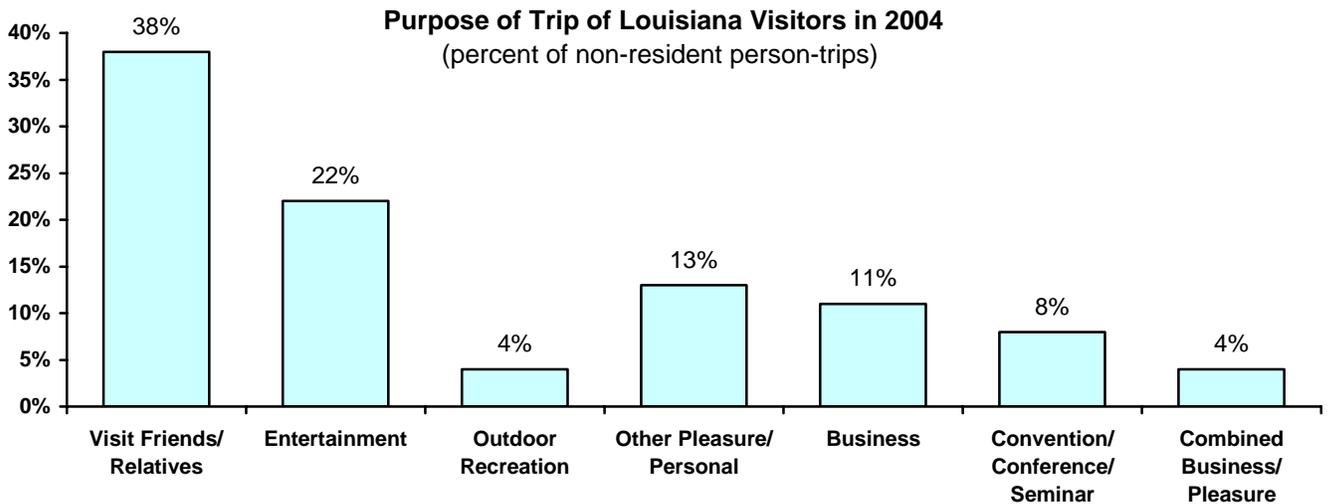
Demographics are for the head of household.

TRIP CHARACTERISTICS (Non-resident Visitors)

Primary Purpose of Trip

The majority of non-resident visitors to Louisiana traveled for leisure purposes in 2004. Leisure visitors generated over three out of four (78%) non-resident person-trips to Louisiana. Leisure visitors are travelers whose purpose is visiting friends and relatives, entertainment, outdoor recreation, or other pleasure/personal reasons. Visiting friends/relatives accounted for over one third (38%) of all non-resident person-trips to Louisiana. Almost a quarter (22%) of Louisiana person-trips were for entertainment purposes. Travel to Louisiana for other pleasure/personal reasons accounted for 13 percent of non-resident person-trips in 2004.

In 2004, nineteen percent of non-resident visitors traveled to Louisiana for business or convention purposes and four percent for combined business and pleasure purposes.

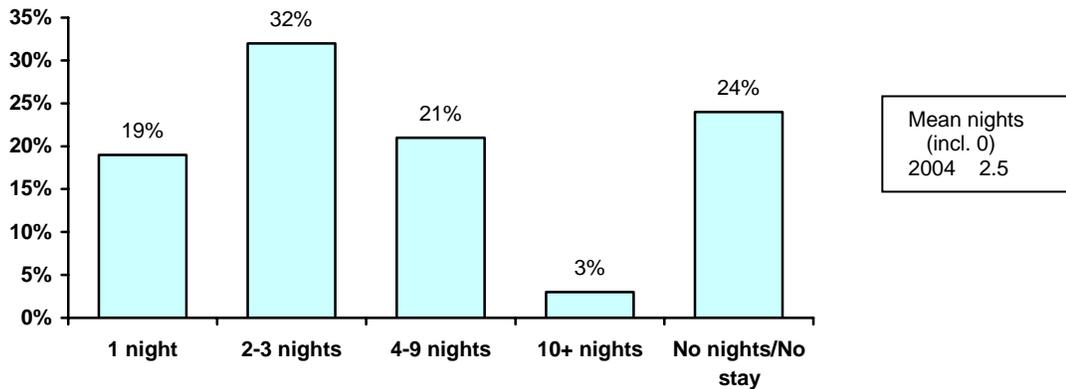


Length of Stay

Three in four (76%) Louisiana non-resident visitors spent one or more nights in the state in 2004. Overnight trips lasted an average of 3.3 nights. Including day trips, non-resident Louisiana trips lasted 2.5 nights, on average.

One half (51%) of non-resident visitors to Louisiana spent just one night (19%) or 2-3 nights in the state (32%). One in five (21%) spent from 4-9 nights in the state. More than one in five (24%) were visiting just for the day.

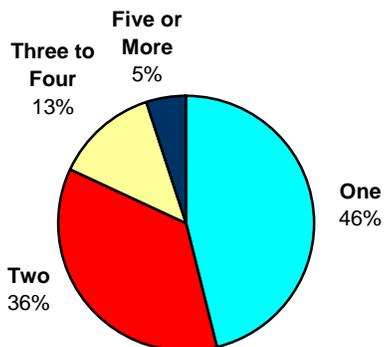
Length of Stay of Louisiana Visitors in 2004
(percent of non-resident person-trips)



Travel Party Size and Presence of Children

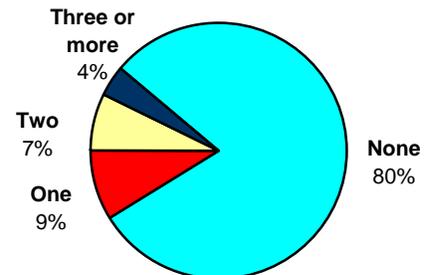
Nearly half (46%) of non-resident trips to Louisiana involved one person from the household. Twenty percent of non-resident trips to Louisiana in 2004 involved children. Residents (16%) were less likely to travel with children than non-residents (20%).

Household Travel Party Size*, 2004
(percent of non-resident household trips)



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

Presence of Children on Trip, 2004
(percent of non-resident household trips)

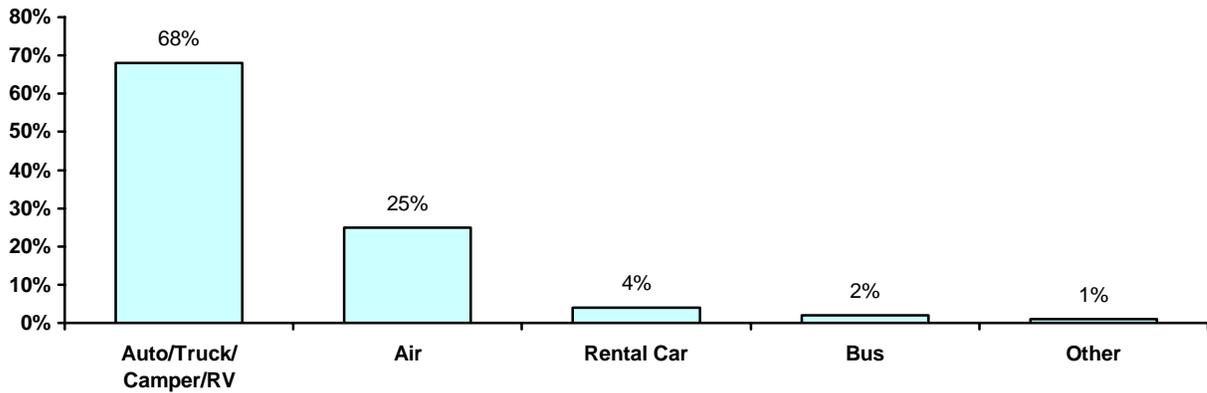


Average Number of children on trip: 1.8

Primary Mode of Transportation

In Louisiana, as in the U.S. as a whole, the majority of travel is by personal auto or truck or camper/RV. In 2004, 68 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 four percent used a rental car as a secondary mode of transportation. A quarter (25%) of Louisiana non-resident person-trips were by air. Other transportation types, including bus, train and boat, accounted for three percent of person-trips.

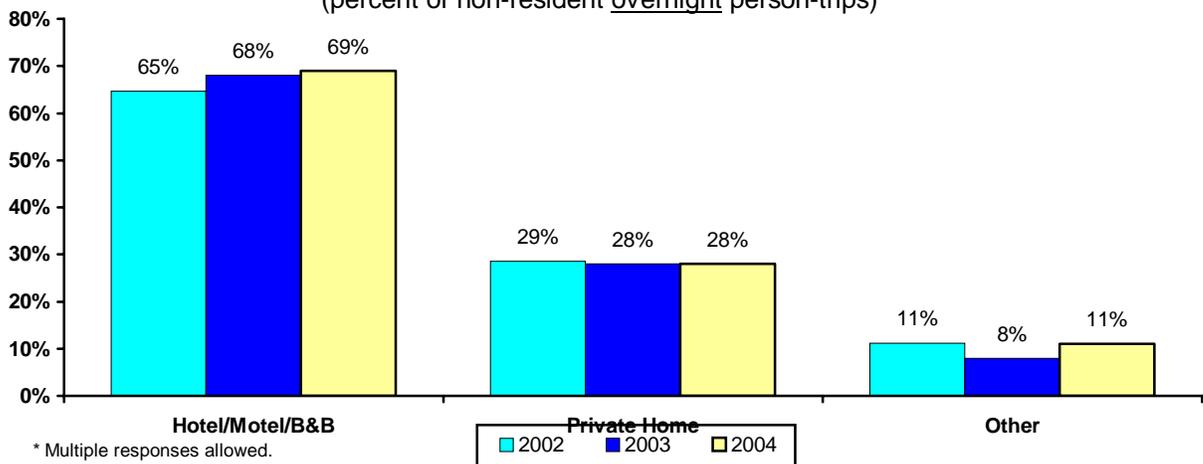
Primary Mode of Transportation of Louisiana Visitors in 2004
(percent of non-resident person-trips)



Lodging Use

Of the 12.9 million non-resident overnight visitors to Louisiana, two thirds (69%) included stays in hotels, motels or B&Bs. The share of non-resident visitors using hotels was up slightly from 2003 (68% in 2003 vs. 69% in 2004). Almost one in three (28%) non-resident overnight visitors stayed in a private home, while eleven percent stayed in other lodging accommodations.

Lodging Use of Louisiana Visitors in 2004*
(percent of non-resident overnight person-trips)



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

Month and Season of Travel

In 2004, spring had the highest share of travel for both total (26%) and non-resident (28%) person-trips. The heaviest single months for total travel were December (10%), March (10%), May (10%), and July (11%). Fall was the slowest season (23% total and 23% non-resident).

Travel by Season to Louisiana, 2004

(Percent of person-trips)

	<u>Total</u>	<u>Non-resident</u>		<u>Total</u>	<u>Non-resident</u>
<u>Winter</u>	25%	23%	<u>Summer</u>	26%	26%
January	7	6	June	9	8
February	8	8	July	11	12
December	10	9	August	6	6
<u>Spring</u>	26%	28%	<u>Fall</u>	23%	23%
March	10	12	September	7	7
April	6	6	October	7	7
May	10	10	November	9	9

Cities Visited

New Orleans is the most popular city destination within Louisiana. Four in ten (45%) non-resident visitors traveled to New Orleans in 2004. Twelve percent of non-resident person-trips were to Shreveport, seven percent to Baton Rouge, seven percent to Lake Charles and three percent to Lafayette. (See Appendix G for explanation of city volume estimates.)

2004 Top Cities Visited within Louisiana (percent/count of non-resident person-trips)		
City	Percent*	Estimated Volume Count
New Orleans	45%	7,675,000
Shreveport	12	2,078,000
Baton Rouge	7	1,142,000
Lake Charles	7	1,162,000
Lafayette	3	493,000
Monroe	2	288,000
Alexandria	1	171,000

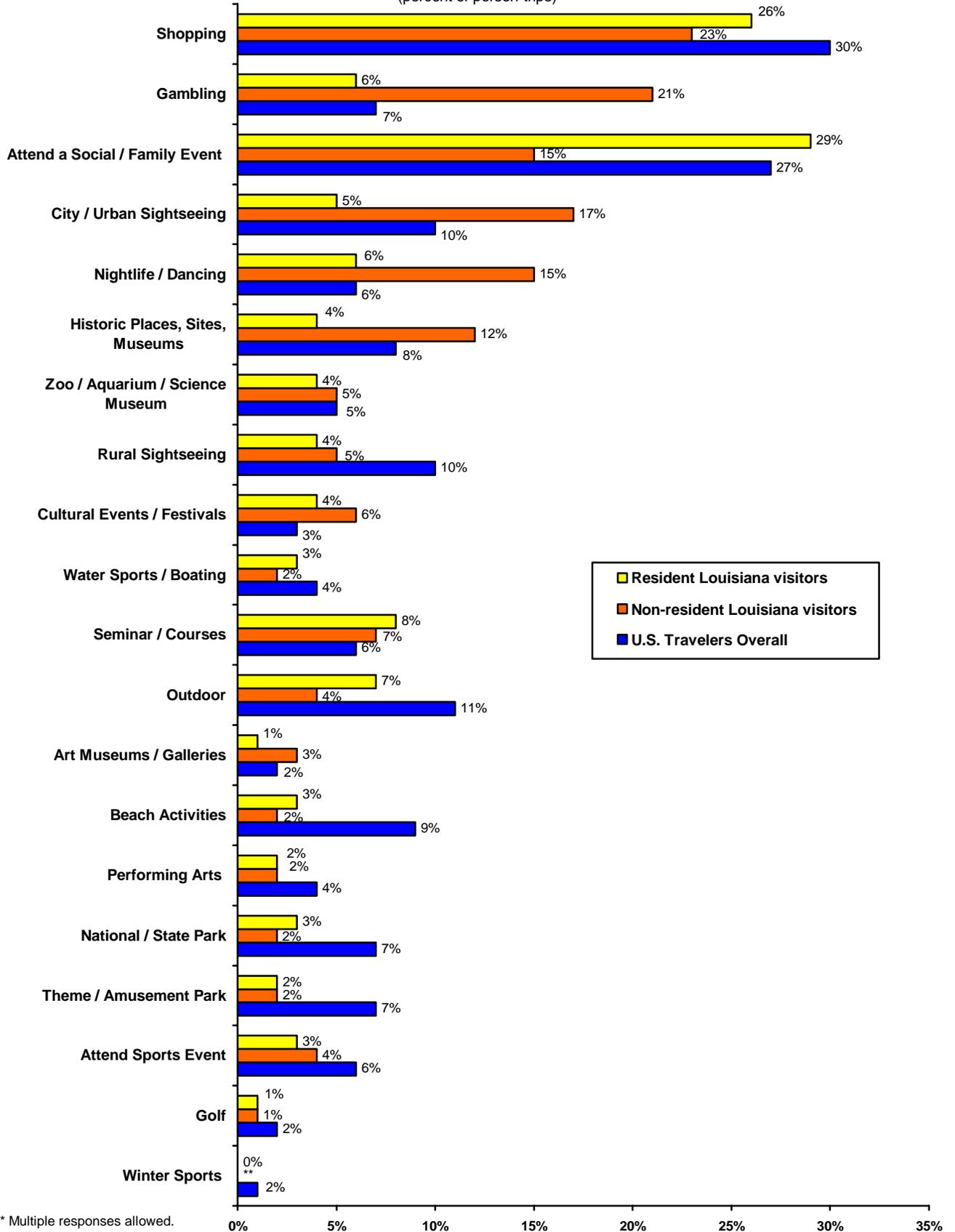
* Travelers may visit multiple cities on the same trip.

Trip Activities

Gambling and shopping remain the most popular activities for non-resident visitors to Louisiana. In 2004, one in five (21%) non-resident visitors included gambling as a trip activity, compared to just six percent of resident visitors. Nationally, just seven percent of travelers gamble while on a trip. Shopping is the most popular activity for U.S. domestic travelers overall (30%), while 23% of non-resident person-trips to Louisiana included shopping as an activity. Attending a social/family event remains the most popular activity for resident visitors (29%) and ties for fourth as the most popular activity for non-resident visitors (15%).

Trip Activities by 2004 Travelers*

(percent of person-trips)



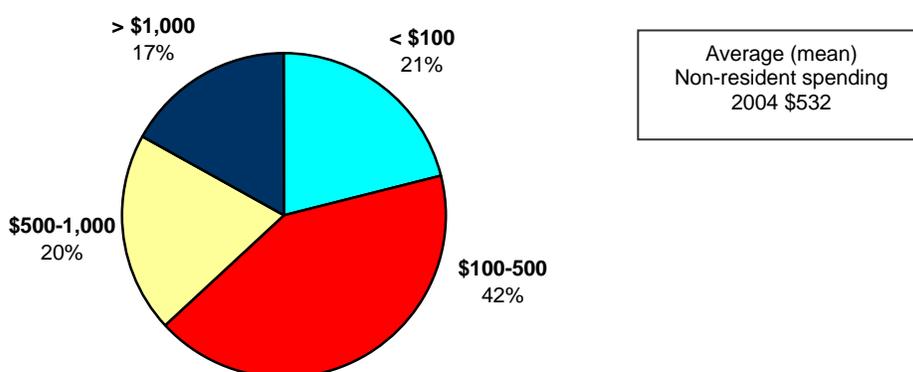
* Multiple responses allowed.
 **Less than 0.5%.

Spending*

Non-resident households visiting Louisiana spent an average of \$532 while visiting the state. Forty-two percent of non-resident visitors spent between \$100 and \$500 while in Louisiana. Over one third (37%) of trips to Louisiana involved \$500 or more in spending. Just one in five (21%) non-resident visitors spent less than \$100. Residents spent less than non-resident visitors. Average spending per resident household was just \$185 in 2004.

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

Spending In-state by Louisiana Visitors in 2004
(percent of non-resident household-trips)



Average spending differs considerably by state of origin. In this section, spending habits of visiting households from the top five origin states are analyzed using data from 2004. During 2004, households visiting from California spent the most on average (\$819), followed by Florida (\$709). Mississippi visitors spent the least (\$350). 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 2004 household-trips)

State of Origin	Average Spending In Louisiana (per household per trip)	Number of Trips Per Year (in thousands of household trips)
Total Non-resident	\$532	8,856
California	\$819	660
Florida	\$709	889
Texas	\$333	7,574
Alabama	\$694	891
Mississippi	\$350	1,561

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

Other States Visited

In 2004, 21 percent of non-resident Louisiana visitors also visited Mississippi, while 17 percent also visited Texas on the same trip.

2004 Other States Visited on Louisiana Trips (percent of person-trips)		
State	Total Visitors	Non-resident Visitors
Mississippi	18%	21%
Texas	14%	17%
Alabama	10%	12%
Florida	5%	7%
Arkansas	4%	4%
Georgia	3%	3%
Tennessee	2%	3%
North Carolina	<1%	<1%

MINORITY TRAVEL

This section of the report examines the characteristics of minority travelers to Louisiana, focusing specifically on the large number of African-American travelers to the state. Two cautions are necessary when looking at this data. First, the data are based on a relatively small sample size. The sample of African-American households is too small to consider segmenting travel by residence; therefore the following information is based on all African-American travelers in the state. The sample of African-American households visiting Louisiana is of sufficient size to represent the travel trends and travel characteristics of this group.

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

African-American Travel to Louisiana

Louisiana ranked second among states with the highest share of African-American visitors. In 2004, Mississippi ranked first in share of African-American travel among all fifty states. This is not surprising as these states have higher-than-average African-American populations, and states of residence are correlated with states of destination. The other minority travelers who visited Louisiana in 2004 included 2% of visitors who indicated that they were of Spanish origin and 2% who indicated that they were from other non African-American minority groups.

States with Large Shares (10%+) of African-American Visitors, 2004

<u>State</u>	<u>Percent of State's Person-trip Visitors</u>
Mississippi	16%
Louisiana	15
Georgia	12
DC	12
Delaware	12
South Carolina	12
Virginia	11

Trip Characteristics

An estimated 3.4 million African-Americans traveled in the state in 2004. African-American visitors to Louisiana most often traveled for leisure (90% of person-trips). Business travel represented 10 percent of African-American person-trips to Louisiana in 2004.

African-American travelers to Louisiana in 2004 were similar to Louisiana travelers in general in that they traveled most for leisure, traveled mostly by car, and enjoyed shopping, attending social/family events, gambling, and participating in nightlife /dancing. There were also several differences between African-American and overall visitors to Louisiana. Compared to overall visitors, African-American visitors to Louisiana were:

- More likely to be traveling for the purpose of visiting family and friends (49% African-American vs. 37% total) and less likely to be traveling for business (10% African-American vs. 22% total).
- Less likely to travel to Louisiana by air (9% African-American vs. 19% total) but were more likely to use a rental car as a primary mode of transportation (8% African-American vs. 3% total).
- More likely to travel in the fall months, September-December, (37% African-American vs. 33% total).
- More likely to take a day trip (32% African-American vs. 30% total).
- Less likely to stay in a hotel, motel or B&B (38% African-American vs. 43% total).
- More likely to attend social or family events (32% African-American vs. 19% total).
- Less likely to travel alone (26% African-American vs. 45% total) and more likely to travel with children (46% African-American vs. 21% total).
- Less likely to be married (48% African-American vs. 67% total) and more likely to have children in the household (45% vs. 41% total).
- Younger, on average (household head 45 years old, African-American vs. 47 years old, total).
- Less likely to have average annual household incomes of \$50,000 or more (47% African-American vs. 57% total).
- Spending slightly less per household on Louisiana trips (\$359 African-American vs. \$442 total).

This section of the report examines the characteristics of minority travelers to Louisiana, focusing specifically on the large number of African-American travelers to the state. Two cautions are necessary when looking at this data. First, the data are based on a relatively small sample size. The sample of African-American households is too small to consider segmenting travel by residence; therefore the following information is based on all African-American travelers in the state. The sample of African-American households visiting Louisiana is of sufficient size to represent the travel trends and travel characteristics of this group.

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

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 2004. Visitors by origin state are compared to all 2004 non-resident travelers to Louisiana.

Visitors from Texas are:

- ◆ More likely to travel to Louisiana for leisure purposes (82% TX vs. 78% total non-resident)
- ◆ More likely to travel by auto, truck, RV, or rental car (82% TX vs. 68% total non-resident)
- ◆ Less likely to spend the night (70% TX vs. 76% total non-resident)
- ◆ Spending less per household per trip (\$333 TX vs. \$532 total non-resident)
- ◆ More likely to visit Shreveport (20% TX vs. 19% total non-resident) and less likely to visit New Orleans (21% vs. 56%) and Baton Rouge (4% vs. 8%)
- ◆ More likely to gamble while visiting Louisiana (32% TX vs. 21% total non-resident) and less likely to shop (14% vs. 23%)
- ◆ From households with slightly lower average annual incomes (\$66.9K TX vs. \$71.8K total non-resident)

Visitors from Mississippi are:

- ◆ More likely to travel to Louisiana for leisure purposes (82% MS vs. 78% total non-resident)
- ◆ More likely to travel by auto, truck, RV or rental car (85% MS vs. 68% total non-resident)
- ◆ Less likely to spend the night (63% MS vs. 76% total non-resident)
- ◆ Less likely to stay in a hotel, motel or B&B (55% MS vs. 69% total non-resident)
- ◆ Less likely to visit New Orleans (33% MS vs. 56% total non-resident), Shreveport (8% vs. 19%) or Lake Charles (1% vs. 9%)
- ◆ Less likely to gamble while visiting Louisiana (10% vs. 21%), or engage in city/urban sightseeing (14% MS vs. 17% total non-resident), more likely to shop (32% vs. 23%) or attend a social/family event (21% vs. 15%)
- ◆ Spending less (\$350 MS vs. \$532 total non-resident)
- ◆ More likely to be from African-American households (19% MS vs. 16% total non-resident)
- ◆ From households with slightly lower average annual incomes (\$56.4K MS vs. \$71.8K total non-resident)
- ◆ More likely to have children in the household (48% MS vs. 30% total non-resident)

Visitors from Florida are:

- ◆ More likely to travel by air (26% FL vs. 25% total non-resident)
- ◆ More likely to spend the night (85% FL vs. 76% total non-resident)
- ◆ More likely to visit New Orleans (64% FL vs. 56% total non-resident) and less likely to visit Shreveport (3% vs. 19%), Lake Charles (3% vs. 9%) or Lafayette (0% vs. 4%)
- ◆ Less likely to gamble (18% FL vs. 21% total non-resident), attend social/family events (9% vs. 15%) and more likely to participate in nightlife/dancing (17% vs. 15%), or shop (34% vs. 23%) or engage in city/urban sightseeing (25% vs. 17%).
- ◆ Less likely to be from African-American households (5% FL vs. 16% total non-resident)
- ◆ From households with higher average annual incomes (\$76.4K FL vs. \$71.8K total non-resident)

Visitors from Alabama are:

- ◆ More likely to travel to Louisiana for business purposes (26% AL vs. 22% total non-resident)
- ◆ More likely to travel by air (26% AL vs. 25% total non-resident)
- ◆ Less likely to spend the night (70% AL vs. 76% total non-resident)
- ◆ Less likely to stay in a hotel, motel or B&B (53% AL vs. 69% total non-resident)
- ◆ Less likely to gamble (7% AL vs. 21% total non-resident) or shop (13% vs. 23%) and more likely to engage in nightlife/dancing (23% vs. 15%) or city/urban sightseeing (21% vs. 17%)
- ◆ Less likely to visit Shreveport (3% AL vs. 19% total non-resident), Lake Charles (0% vs. 9%), Lafayette (0% vs. 4%) and more likely to visit Baton Rouge (11% vs. 8%) or New Orleans (58% vs. 56%)
- ◆ More likely to be from African-American households (21% AL vs. 16% total non-resident)
- ◆ Spending more (\$694 AL vs. \$532 total non-resident)

Visitors from California are:

- ◆ Less likely to be traveling for business purposes (20% CA vs. 22% total non-resident)
- ◆ More likely to travel by air (50% CA vs. 25% total non-resident)
- ◆ More likely to stay overnight (93% CA vs. 76% total non-resident)
- ◆ More likely to stay in a private home (40% CA vs. 28% total non-resident)
- ◆ More likely to shop while visiting the state (34% CA vs. 23% total non-resident), participate in nightlife/dancing (34% vs. 15%) and engage in city/urban sightseeing (33% vs. 17%) and less likely to attend social/family events (12% vs. 15%)
- ◆ More likely to visit New Orleans (57% CA vs. 56% total non-resident) Baton Rouge (9% vs. 8%) and less likely to visit Shreveport (0% vs. 19%) or Lake Charles (2% vs. 9%) or Lafayette (3% vs. 4%)
- ◆ More likely to be from African-American households (28% CA vs. 16% total non-resident)
- ◆ Spending more (\$819 CA vs. \$532 total non-resident)
- ◆ From households with high average annual incomes (\$108.5K CA vs. \$71.8K total non-resident)

Summary Table of Trip Characteristics by Origin State

TRIP CHARACTERISTICS	Louisiana Non-resident Visitors (2004)	Top Origin States of Louisiana Visitors* (Based on data from 2004)				
		Texas	Mississippi	Florida	Alabama	California
Non-resident Louisiana visitors						
Person-trips	100%	32%	7%	4%	4%	3%
Household-trips	100%	32%	5%	4%	4%	3%
TRIP CHARACTERISTICS - in person-trips						
Primary Purpose of Trip						
Leisure	78%	82%	82%	69%	74%	80%
Business	22	18	18	31	26	20
Primary Mode of Transportation						
Auto (car/truck/RV/rental car)	68%	82%	85%	67%	68%	44%
Air	25	12	4	26	26	50
Trip Duration						
Percent Overnight	76%	70%	63%	85%	70%	93%
Average trip duration (including day-trips)	2.5 nights	1.8 nights	1.2 nights	3.0 nights	2.4 nights	4.2 nights
Average OVERNIGHT trip duration	3.3 nights	2.5 nights	1.8 nights	3.6 nights	3.4 nights	4.5 nights
Lodging Use (% overnight person-trips)						
Hotel/Motel/B&B	69%	68%	55%	67%	53%	59%
Private Home	28	29	37	20	23	40
Top Activities						
Gambling	21%	32%	10%	18%	7%	7%
Shopping	23	14	32	34	13	34
Attend a Social/family Event	15	16	21	9	17	12
City/Urban Sightseeing	17	7	14	25	21	33
Nightlife/Dancing	15	8	8	17	23	34
Top MSAs of Destination						
New Orleans	56%	21%	33%	64%	58%	57%
Shreveport	19	20	8	3	3	--
Baton Rouge	8	4	9	2	11	9
Lake Charles	9	13	1	3	--	2
Lafayette	4	3	4	--	--	3
Race						
Non-minority	81%	79%	81%	89%	77%	72%
African-American	16	17	19	5	21	28
TRIP CHARACTERISTICS - in household-trips						
Trip Spending						
Average trip spending per household	\$532	\$333	\$350	\$709	\$694	\$819
DEMOGRAPHICS - in household-trips						
Household Income						
Average annual income	\$71,800	\$66,900	\$56,400	\$76,400	\$60,800	\$108,500
Age of Household Head						
Average age	47	49	50	44	48	47
Children in Household						
Percent with children	30%	33%	48%	23%	15%	21%

Demographics are for the head of household.

*Caution, small sample size.

COMPETITIVE COMPARISON

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

Volume Trends

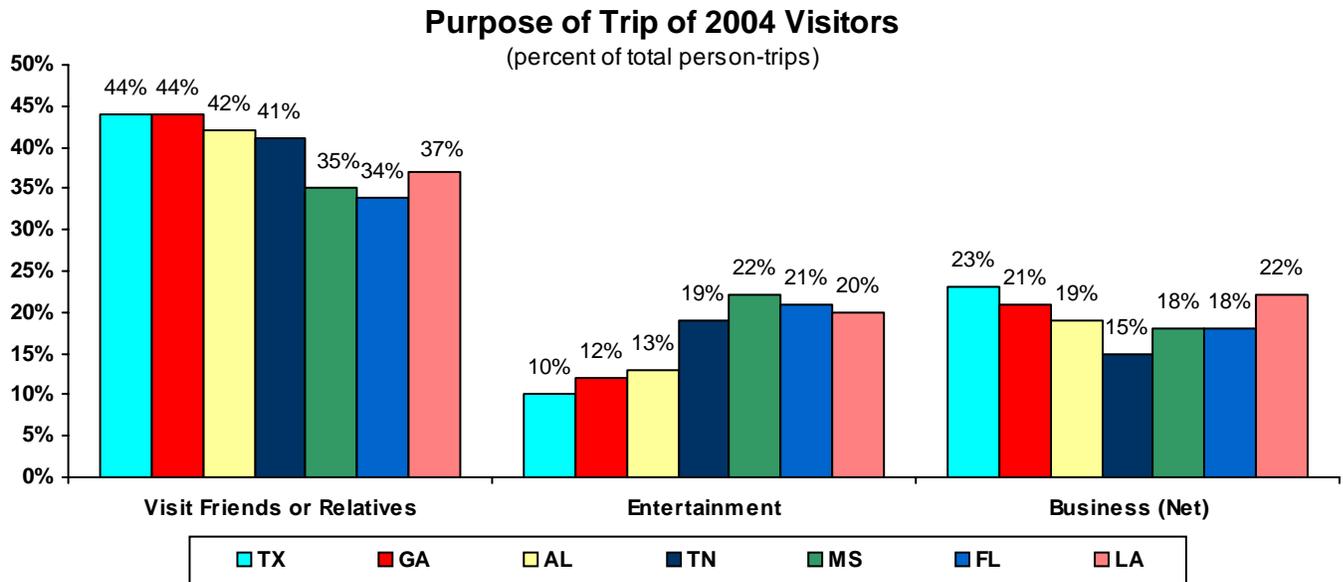
Two of the six competitive states experienced growth in travel volume in 2004 over 2003. The largest increase was seen in Texas, with a 2.2 percent increase in volume over 2003 and Tennessee saw an increase of 2.1% above 2003 volumes.

Almost three quarters (72%) of Louisiana person-trips are non-resident travelers. Mississippi (68%) had the highest proportion of non-resident travel among the competitive states.

Competitive States' Visitor Volumes, 2004			
Visitors to:	Total Visitor Volume (in millions of person-trips)	Percent Change from 2003	Percent non-resident travel
Louisiana	23.6 million	-5.8%	72%
Florida	85.2	-5.7%	57
Texas	83.8	+2.2%	29
Georgia	46.2	-3.8%	61
Tennessee	43.6	+2.1%	67
Alabama	25.4	-6.4%	58
Mississippi	20.9	-10.6%	68

Purpose of Trip

Reasons for traveling were generally similar across the competitive set of six states in 2004, with a few exceptions. While visiting friends and relatives was the most common purpose of trip across all states, Texas and Georgia had the highest share each with 44% of travel to visit friends or relatives and Florida had the lowest share (34%). Trips for entertainment purposes were more predominant in Mississippi (22%), and Florida (21%) and Louisiana (20%). Business trips accounted for 20% or more of person-trips from these states Louisiana, Texas, and Georgia.



Transportation Mode

The proportion of auto travel (car/truck/camper/RV) of non resident visitors to Louisiana (68% of person-trips) was lower than the national domestic travel average (77%) in 2004. States with higher than average shares of auto travel to Louisiana included Mississippi (85%), and Texas (82%). Florida (26%), and Alabama (26%) had a higher share of air travel to Louisiana than the national domestic travel by air (16%).

Trip Duration

On visits to Louisiana, Florida had the longest average overnight trip duration (3.6 nights) and the smallest share of day trips (15%) in 2004. Texas visitors stayed an average of 2.5 nights and 30% of Texas person-trips were for day-trips only.

Lodging Use

Hotels, motels and B&Bs were the most popular form of lodging across all competitive states and in Louisiana in 2004. The share of hotel/motel/B&B use by overnight visitors was highest in Mississippi (65%), Louisiana (63%) and Tennessee (60%). The other competitive states' share of hotel/motel/B&B used by overnight visitors were as follows, Florida (54%), Georgia (55%) and Texas (50%). Alabama visitors were least likely to use hotels, motels and B&Bs (46%).

Private home use was the second most popular lodging type. Four in ten visitors to Texas (43%), while in Alabama (40%) and Georgia (37%) stayed in private homes. In Florida (33%), Tennessee (28%), Louisiana (30%) and Mississippi (29%) used private home lodging.

Florida (15%) and Alabama (7%) were the only competitive states with any substantial levels of condo/time share use.

Activities

Shopping was the most popular activity in five of the six competitive states, as it was for U.S. domestic travelers overall (31%). Visitors to Florida (31%), Texas (28%) and Tennessee (28%) enjoyed shopping while in the state. Twenty-four percent of Louisiana visitors participated in shopping activities, while in Georgia (21%) and Alabama (21%) shopped. Just 16 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 26 percent of Mississippi person-trips involved gambling. Seventeen percent of Louisiana person-trips included gambling while in the state. Attending family/social events was the second most popular activity with overall U.S. domestic travelers (27%) and in Louisiana (19%).

In-State Trip Activities Comparison for 2004 Visitors

(percent of person-trips)

	Louisiana	Texas	Mississippi	Alabama	Tennessee	Georgia	Florida
Trip Activities*							
Shopping	24%	28%	16%	21%	28%	21%	31%
Attend a Social/Family Event	19	26	15	21	17	17	16
Gambling	17	1	26	1	1	**	2
City/Urban Sightseeing	14	9	5	4	8	7	9
Nightlife/Dancing	12	6	2	3	4	5	8
Historic Places, Sites, Museums	10	7	4	4	9	6	6
Rural Sightseeing	5	6	5	5	10	6	5
Zoo/Aquarium/Science Museum	5	4	1	3	7	2	6
Cultural Events/Festivals	5	2	2	1	2	3	2
Seminar/Courses	7	6	4	4	4	5	7
Water Sports/Boating	2	3	1	3	2	2	6
Outdoor	5	9	3	5	7	5	7
Art Museums/Galleries	2	2	1	1	1	1	1
Performing Arts	2	2	2	2	4	3	2
National/State Park	2	3	2	3	9	4	5
Beach Activities	2	5	4	7	**	3	25
Theme/Amusement Park	2	5	1	2	7	3	25
Attend Sports Event	4	6	3	6	4	4	4
Golf	1	1	1	3	2	1	4
Winter Sports	**	**	**	-	**	**	**

*Multiple responses allowed.

**Less than 0.5%.

Competitive States' Visitors Also Visiting Louisiana Within the Same Trip

When we look at visitors to nearby competitive states, we see a significant level of crossover among states visited on a single trip. Texas in 2004, four percent (or 3.3 million) also visited Louisiana on the same trip. Twenty percent of Mississippi's 20.9 million visitors also visited Louisiana, as did 9 percent of Alabama's 25.4 million visitors, four percent of Texas's 83.8 million visitors.

Competitive States' Visitors Also Visiting Louisiana, 2004			
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	83.8 million	4.0%	3.3 million
Mississippi	20.9	20.4%	4.3
Alabama	25.4	9.1%	2.3
Florida	85.2	1.5%	1.3
Tennessee	43.6	1.1%	0.5
Georgia	46.2	1.3%	0.6

APPENDICES

SURVEY METHODOLOGY

TravelScope is a cooperative research effort, funded by states, cities and other participants and managed by the research department of the Travel Industry Association. Since 1994, TravelScope has collected visitor volume, market share, trip characteristics, and demographics for all U.S. resident travel.

To collect these data, TravelScope uses a mail panel of U.S. households operated by National Family Opinion (NFO) Research, Inc. Each month, a representative sample of 25,000 households is mailed a questionnaire that asks the total number of trips of 50 miles or more away from home and/or overnight trips taken in the previous month by all members of the household. On average, TIA obtains responses from 5,000 traveling households each month.

The panel has more than 550,000 households representing over 1.2 million people nationwide (or one in every 182 U.S. households) – the largest consumer panel in the industry. So that samples are representative of all U.S. households, the panel is selected to match the U.S. census population on five variables: census region of residence, market size of residence, age of household head, household income, and household size.

Respondents are asked to record details of up to three trips taken in the previous month. Specifically, the survey collects information on:

- primary and secondary purpose of trip,
- primary and secondary mode of transportation,
- the number of household members traveling (adults and children),
- up to three states or countries visited on each trip,
- key cities/places visited in each state/country,
- the number of nights in each type of accommodation,
- trip expenditures, and
- activities.

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

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

Estimate of Sampling Error

	<u>Sample Size</u>	<u>Sampling Error*</u>
Total Households	53,715	+/- 0.4%
Louisiana visiting households	1,089	+/- 3.0%
Non-resident households visiting Louisiana	830	+/- 3.4%
African-American households visiting Louisiana	144	+/- 8.2%

* At the 95 percent confidence level.

TRAVELSCOPE SURVEY CARD

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

53257

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

OCTOBER	Pur- pose (See Codes)	Trans- portation (See Codes)	Number Of HH Members Traveling	List States/ Countries Visited (X box if passed through only)	Key Cities & Places Visited In That State/Country	# Nights In Each State/Country In: (X box if no nights)	Hotel/ Motel/ B&B	Pri- vate Home	Condo/ Time Share	RV/ Tent	Other	Total \$ Spent Per State/ Country	Activities In State/ Country (See Codes)
Trip #1													
			No. By Age	<input type="checkbox"/> 1.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Primary			0-17	<input type="checkbox"/> 2.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Secondary			18+	<input type="checkbox"/> 3.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	
PURPOSE CODES				TRANSPORTATION CODES				ACTIVITY CODES					
1= Visit friends/relatives				1= Own Auto/ 6= Bus				01= Historic places, sites, museums				14= Theme/Amusement park	
2= Outdoor recreation				Truck 7= Motor-coach				02= Performing Arts (e.g., Concerts, Plays, Stage shows)				15= Zoo/Aquarium/Science Museum	
3= Entertainment/Sightseeing				2= Rental car				03= Cultural Events/Festivals				16= Winter sports (e.g., skiing)	
4= Other pleasure/personal				3= Camper/RV 8= Train				04= Art museums/Galleries				17= Rural sightseeing	
5= Business-General (e.g., Consulting, Service)				4= Ship/Boat 9= Other				05= Outdoor (e.g., hunt, fish, hike, bike, camp)				18= City/Urban sightseeing	
6= Business-Convention/Conference/Seminar				5= Airplane				06= Shopping				19= Seminar/Courses	
7= Combined Business/pleasure								07= Nightlife/Dancing				20= Attend a social/family event (e.g., wedding, funeral, graduation)	
								08= Beach activities					
								09= National/State park					
								10= Attend sports event					
								11= Gambling					
								12= Water sports/Boating					
								13= Golf					

ANSWER THIS SIDE FIRST

CONTINUE ⇨

OCTOBER	Pur- pose (See Codes)	Trans- portation (See Codes)	Number Of HH Members Traveling	List States/ Countries Visited (X box if passed through only)	Key Cities & Places Visited In That State/Country	# Nights In Each State/Country In: (X box if no nights)	Hotel/ Motel/ B&B	Pri- vate Home	Condo/ Time Share	RV/ Tent	Other	Total \$ Spent Per State/ Country	Activities In State/ Country (See Codes)
Trip #2													
			No. By Age	<input type="checkbox"/> 1.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Primary			0-17	<input type="checkbox"/> 2.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Secondary			18+	<input type="checkbox"/> 3.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Trip #3													
			No. By Age	<input type="checkbox"/> 1.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Primary			0-17	<input type="checkbox"/> 2.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Secondary			18+	<input type="checkbox"/> 3.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	
PURPOSE CODES				TRANSPORTATION CODES				ACTIVITY CODES					
1= Visit friends/relatives				1= Own Auto/ 6= Bus				01= Historic places, sites, museums				14= Theme/Amusement park	
2= Outdoor recreation				Truck 7= Motor-coach				02= Performing Arts (e.g., Concerts, Plays, Stage shows)				15= Zoo/Aquarium/Science Museum	
3= Entertainment/Sightseeing				2= Rental car				03= Cultural Events/Festivals				16= Winter sports (e.g., skiing)	
4= Other pleasure/personal				3= Camper/RV 8= Train				04= Art museums/Galleries				17= Rural sightseeing	
5= Business-General (e.g., Consulting, Service)				4= Ship/Boat 9= Other				05= Outdoor (e.g., hunt, fish, hike, bike, camp)				18= City/Urban sightseeing	
6= Business-Convention/Conference/Seminar				5= Airplane				06= Shopping				19= Seminar/Courses	
7= Combined Business/pleasure								07= Nightlife/Dancing				20= Attend a social/family event (e.g., wedding, funeral, graduation)	
								08= Beach activities					
								09= National/State park					
								10= Attend sports event					
								11= Gambling					
								12= Water sports/Boating					
								13= Golf					

ANSWER OTHER SIDE FIRST

Not shown actual size.

GLOSSARY OF TERMS

- Activities** TravelScope gathers information on 20 different activity categories:
- (1) visiting historic places, sites, museums
 - (2) attending performing arts events (e.g., concerts, plays, stage shows)
 - (3) attending cultural events or festivals
 - (4) visiting art museums or galleries
 - (5) outdoor activities (e.g., hunt, fish, hike, bike, camp)
 - (6) shopping
 - (7) engaging in nightlife activities or dancing
 - (8) beach activities
 - (9) visiting national or state parks
 - (10) attending sports events
 - (11) gambling
 - (12) water sports or boating
 - (13) playing golf
 - (14) going to theme or amusement parks
 - (15) visiting zoos, aquariums, or science museums
 - (16) winter sports (e.g., skiing)
 - (17) rural sightseeing
 - (18) city/urban sightseeing
 - (19) taking seminars or courses
 - (20) attending a social or family event (e.g., wedding, funeral, graduation)
- Annual Household Income** The total combined annual income of the household before taxes.
- Business Trip** Any trip where the primary purpose of the trip was given as “business-general (e.g., consulting, service),” “convention/conference/seminar,” or “combined business and pleasure.”
- Census Region/Division Of Origin/Destination** Regional/Divisional breakdowns as defined by the U.S. Bureau of Census:
- | | |
|-----------|---|
| Northeast | 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. |

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

Midwest	East North Central: Illinois, Indiana, Michigan, Ohio and Wisconsin West North Central: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota and South Dakota.
West	Mountain: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah and Wyoming. Pacific: California, Oregon and Washington. (Alaska and Hawaii as destinations only)
Designated Market Area (DMA)	Designated Marketing Areas (DMAs) are areas of television coverage defined by counties that are based on surveys conducted by Nielsen Media Research. A DMA was often larger than a Metropolitan Statistical Area (MSA).
Household	Comprises all persons who occupy a “housing unit”, that is, a house, an apartment, or other group of rooms, or a room that constitutes separate living quarters.
Leisure Trip	Any trip where the primary purpose of the trip is given as “visit friends or relatives, outdoor recreation, entertainment/sightseeing, or other pleasure/personal.”
Length of Stay	The number of nights spent on entire trip.
Lifestages	Lifestage groups are based on household size and composition (e.g. number of members, marital status, presence of children), age of household head, and employment of household head.
<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

Lifestages (continued)

<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 was gathered on five lodging categories:
(1) hotel/motel/B&B; (2) private home; (3) condominium/time share;
(4) recreational vehicle/tent; and (5) other.

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

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

Number of Household Members on Trip Number of household members on a trip, including the respondent.

Person-trip A person on a trip. If three persons from a household go together on one trip, their travel counts as one trip and three person-trips. If three persons from this household take two trips, they account for six person-trips. (A trip was counted each time one or more members of a household travel 50 miles or more, one-way, away from home or spends one or more overnights and returns.)

PRIZM Clusters A geodemographic (neighborhood segmentation) system developed from U.S. census demographic data. Households are grouped into “clusters” that exhibit similar demographic and behavioral characteristics. Six categories of variables explain most of the differences: Social Rank (including income and education), Household Composition, Mobility, Ethnicity, Urbanization and Housing. The 62 clusters are combined into 15 distinct Social Groups.

Social Groups

- Elite Suburbs:* Suburban dwellers with high incomes and high education, investment and spending.
- Exurban Blues:* Predominantly white residents of mid-scale, low-density towns on the outskirts of major metropolitan areas and second cities.
- Landed Gentry:* Large, multi-income families with school-aged kids, headed by well-educated executives, professionals and "techies." The fourth most affluent group.
- Rustic Living:* People predominantly from remote country towns, villages, hamlets and reservations with lower-middle income and low cost of living generally working as craftsmen and laborers.
- Urban Cores:* Predominantly singles, solo parents with young children, and the unemployed that are living in dense, rented rowhouses and high-rise apartments. These households reflect the least affluent social group.
- 2nd City Blues:* Second-tier city dwellers living in downtown neighborhoods.
- 2nd City Centers:* Predominantly white residents of mid-scale, middle-density, satellite cities surrounding major metropolitan areas. These households have a lower cost of living.
- 2nd City Society:* Highly educated, high income households in America's "second" and "satellite" cities.

Clusters

- Blue Blood Estates:* Established executives, professionals, and “old money” heirs that live in the wealthiest suburbs and live luxuriously.
- Bohemian Mix:* Highly educated singles, tending to be executives, students, artists, and writers who are living in rented high-rises.
- Boomers & Babies:* Young, white-collar suburban families. Most are executives and “techies” and live in the Western United States. Predominately white, but with significant Asian and Hispanic representation.
- Boomtown Singles:* Young professionals and “techies” living in multi-unit rentals in fast-growing smaller cities in the South, Midwest, and West.
- Country Squires:* Affluent well-educated professionals and white collar managers living in the outer suburbs to seek tranquility in the country.
- God’s Country:* Executive families living away from cities.

PRIZM Clusters (continued)

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

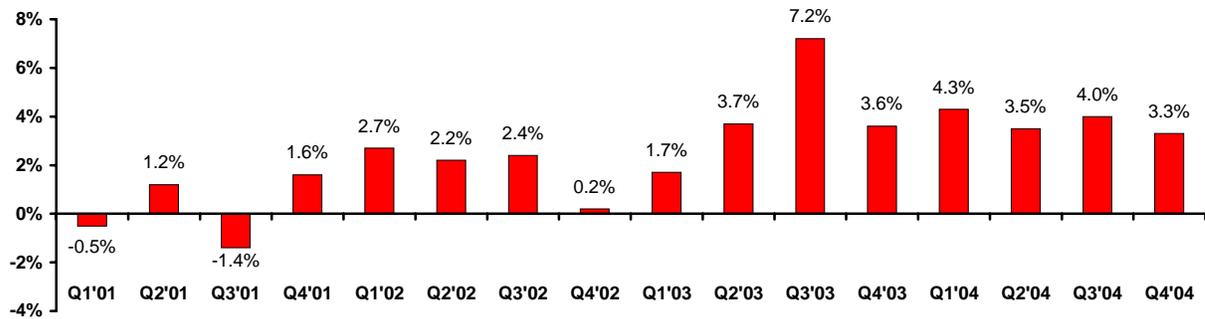
- Purpose of Trip** Each trip is classified according to the respondent's answer to the questions "primary and secondary purpose" with these categories: (1) visit friends or relatives, (2) outdoor recreation, (3) entertainment/sightseeing, (4) other pleasure/personal, (5) business-general (e.g., consulting, service), (6) business-convention/conference/seminar, or (7) combined business and pleasure.
- Trip** A household trip. The term "household trips" counts multiple trips taken by U.S. households in a year. To qualify, a "household trip" must be 50 miles or more, one-way, away from home or include one or more overnights. Respondents are instructed to not include trips commuting to/from work or school or trips taken as a flight attendant or vehicle operator.

ECONOMIC/TRAVEL INDICATORS

The Economy

The U.S. economy registered stronger than expected growth in the last three months of the year, taking the 2004 annual growth rate in real Gross Domestic Product (GDP) to 4.2 percent, the strongest growth in five years. Examining quarterly change in GDP shows that in the first quarter of 2004, real GDP growth reached 4.3 percent, falling to 3.5 percent in the second quarter. In the third quarter, however, real GDP growth climbed to 4.0 percent. The rate of growth, however, slowed in the fourth quarter to 3.3 percent.

**REAL GROSS DOMESTIC PRODUCT
PERCENT CHANGE FROM PRECEDING PERIOD, 2001-2004
(Based on chained 2000 dollars)**

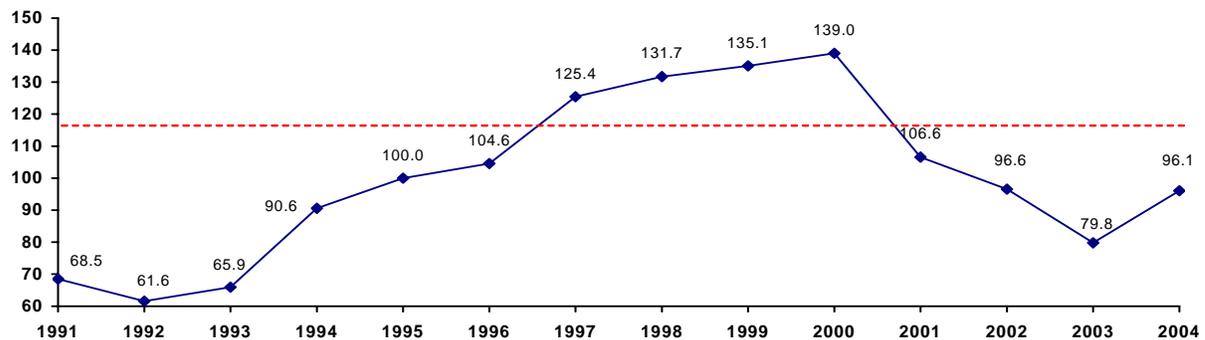


Source: Bureau of Economic Analysis

Consumer Confidence

Consumer confidence, as measured by the Conference Board's *Consumer Confidence Index (CCI)*, showed a decline of 9.4 percent from January to February 2004. However, the index climbed to 105.7 in July, the highest point of the year. The CCI began a steady decline in the last half of the year, falling to 92.6 in November. However, the CCI turned around and climbed to 102.7 in December—an increase of 10.9 percent over November. The average for 2004 was 96.1 (1985 base level = 100), showing significant growth of 20.4 percent from the annual average for 2003 (79.8).

**CONSUMER CONFIDENCE INDEX*
1991-2004**

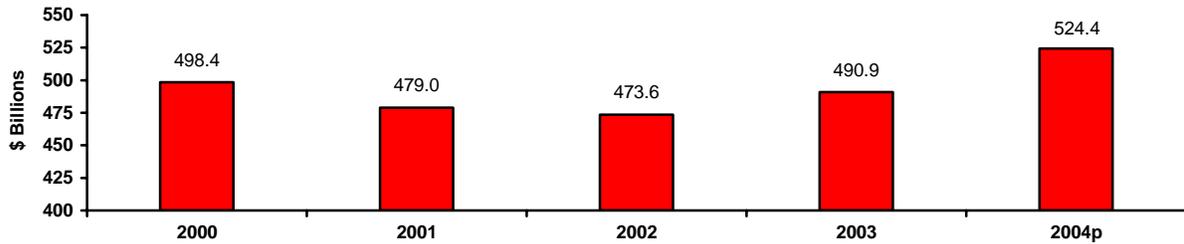


* Average monthly index
Source: The Conference Board, 1985 = 100

Travel Expenditures

TIA estimates that overall domestic travel expenditures by U.S. residents increased 6.8 percent for the year to \$524.4 billion. Indeed, overall domestic travel expenditures by U.S. residents also surpassed the 2001 figure (+9.5%) and the previous record of \$498.4 billion set in 2000 (+5.2%). Total domestic expenditures increased by 2.8 percent in 2003 over 2002.

TRAVEL EXPENDITURES IN THE U.S. 2000- 2004p

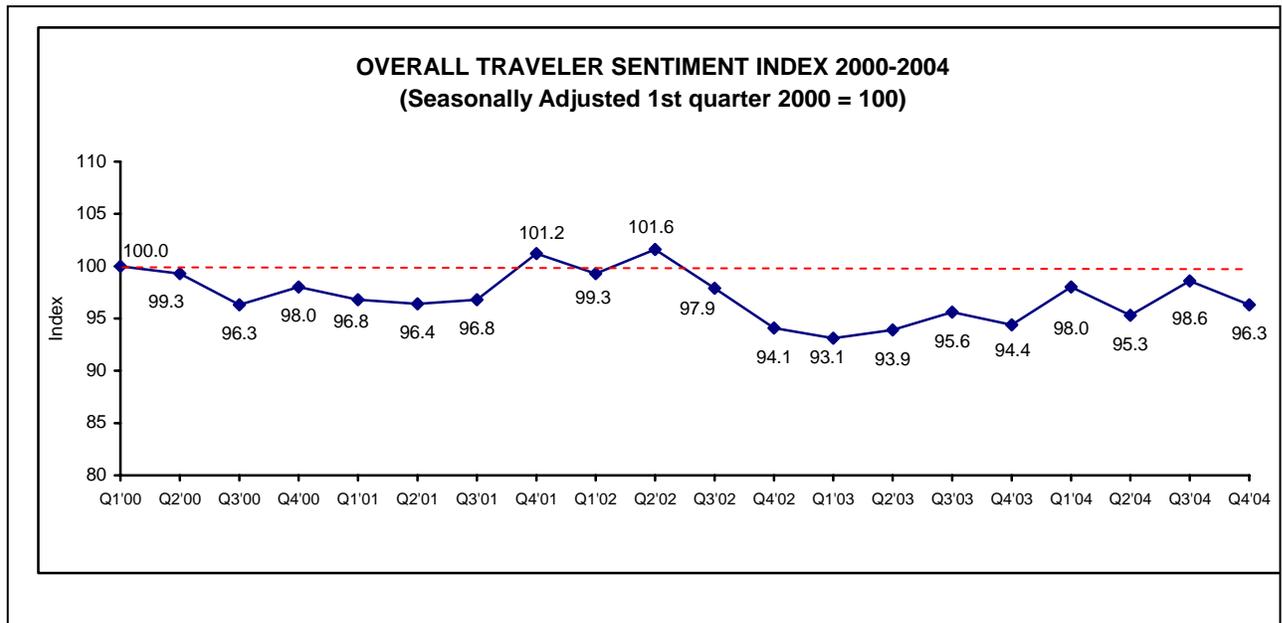


p = preliminary.

Source: Travel Industry Association of America

Traveler Sentiment Index

In the first quarter of 2004, TIA’s *Traveler Sentiment Index** (TSI) stood at 98.0, up from 94.4 in the fourth quarter of 2003. The TSI fluctuated throughout the year, ending the year with a reading of 96.3 in the fourth quarter. This was a 1.7 percent drop from first quarter 2004.



MATURE TRAVEL

This section focuses on Mature Louisiana visitors, i.e., visitors in households headed by someone age 55 or older. Mature households generated 32 percent (or 7.6 million) of all Louisiana person-trips in 2004. Baby Boomer (age 35-54) households generated 39 percent (9.2 million) of the person-trips, and Generation X/Y (age 18-34) households accounted for another 29 percent (6.9 million).

Not surprisingly, a majority (50%) of Mature Louisiana trips are taken by households headed by someone retired, compared to 16 percent of overall Louisiana household trips. The average age of the head of household is 67 versus 47 for overall Louisiana visiting households. Income is slightly lower for Mature traveling households compared to the average Louisiana visiting household (\$63,300 vs. \$66,900).

Trip characteristics of Mature Louisiana visitors are generally similar to those of overall Louisiana visitors, yet there are some differences. For example, Mature Louisiana visitors are a little more likely than overall Louisiana visitors to lodge in a hotel, motel, or B&B on overnight person-trips (66% vs. 63%) and less likely to stay in a private home (27% vs. 30%). Mature Louisiana visitors are also more likely to gamble (26% vs. 17%), yet less likely to go shopping (19% vs. 24%), and engage in nightlife/dancing (6% vs. 12%) and equally likely to attend a social/family event (18% mature visitors vs. 19% total visitors). Average household trip spending tends to be higher among Mature Louisiana visitors compared to overall Louisiana visitors (\$499 vs. \$442), not including transportation to the destination.

Summary Table of Trip Characteristics by Total Louisiana Visitors and Mature Louisiana Visitors (Households Headed by Someone Age 55 and Older), 2004

	Total Louisiana Visitors	Mature Louisiana Visitors (Household Head Age 55+)
TRIP CHARACTERISTICS - in person-trips		
<u>Primary Purpose of Trip</u>		
Leisure	78%	77%
Business	22	23
<u>Primary Mode of Transportation</u>		
Auto (car/truck/RV/rental car)	75%	74%
Air	19	15
<u>Trip Duration</u>		
Percent Overnight	70%	64%
Average Trip Duration (including day-trips)	2.1 nights	1.9 nights
Average OVERNIGHT Trip Duration	3.1 nights	3.3 nights
<u>Lodging Use</u> (% overnight person-trips)		
Hotel/Motel/B&B	63%	66%
Private Home	30	27
<u>Top Activities</u>		
Gambling	17%	26%
Shopping	24	19
Attend a Social/Family Event	19	18
Nightlife/Dancing	12	6
TRIP CHARACTERISTICS - in household trips		
<u>Trip Spending</u>		
Average Trip Spending Per Household	\$442	\$499
DEMOGRAPHICS - in household trips		
<u>Education</u>		
High School Education or Less	18%	22%
Some College – No Degree	23	26
Completed College	38	30
Post Graduate Work	21	22
<u>Employment</u>		
Full-time	71%	39%
Part-time	6	7
Retired	16	50
Unemployed	7	4
<u>Household Income</u>		
Average Annual Income	\$66,900	\$63,300
<u>Age of Household Head</u>		
Average Age	47 years	67 years
<u>Children in Household</u>		
Percent with Children	31%	9%

Demographics are for the head of household.

BUSINESS DEVELOPMENT INDEX

The Business Development Index is calculated for each city to measure the propensity of U.S. households to take trips (measured by household trips) compared to the share of total households. For example, Beaumont-Port Arthur, TX households make up 0.16 percent of U.S. households, yet they take 2.31 percent of domestic household trips to Louisiana, creating a business development index of 1442. The baseline of 100 represents equality in the proportion of U.S. households in a city and the percentage of trips that city's households take to Louisiana. The above figures are based on data from 2003-2004.

2003-2004 DMA Business Development Index for Louisiana

City (DMA) of Origin	Population	Percent Population	Total Average Visitors	2003-2004 Percent Visitors	INDEX
Beaumont-Port Arthur, TX	463,054	0.16%	263,768	1.80%	1139
Tyler-Longview (Lufkin & Nacogdoches), TX	695,121	0.24%	330,747	2.25%	951
Waco-Temple-Bryan, TX	873,092	0.30%	334,549	2.28%	766
Jackson, MS	887,539	0.30%	339,782	2.31%	765
Hattiesburg-Laurel, MS	276,038	0.09%	103,772	0.71%	751
Houston, TX	5,309,366	1.81%	1,873,442	12.75%	705
Biloxi-Gulfport, MS	360,391	0.12%	125,417	0.85%	696
Dallas-Ft. Worth, TX	6,187,889	2.11%	1,384,906	9.43%	447
Mobile-Pensacola (Ft. Walton Beach), AL-FL	1,298,000	0.44%	288,153	1.96%	444
Austin, TX	1,528,510	0.52%	312,976	2.13%	409
Little Rock-Pine Bluff, AR	1,343,360	0.46%	268,209	1.83%	399
Meridian, MS	186,928	0.06%	23,275	0.16%	249
Birmingham (Anniston, Tuscaloosa),AL	1,763,882	0.60%	216,886	1.48%	246
Columbus-Tupelo-West Point, MS	492,869	0.17%	60,283	0.41%	244
Abilene-Sweetwater, TX	310,770	0.11%	37,380	0.25%	240
San Antonio, TX	2,110,113	0.72%	247,844	1.69%	235
Huntsville-Decatur (Florence), AL	911,963	0.31%	103,990	0.71%	228
Sherman-Ada, TX-OK	314,092	0.11%	33,562	0.23%	214
Greenwood-Greenville, MS	233,423	0.08%	24,593	0.17%	211
Victoria, TX	86,546	0.03%	8,882	0.06%	205
Dothan, AL	247,357	0.08%	24,818	0.17%	201
Charlottesville, VA	181,907	0.06%	16,952	0.12%	186
Memphis, TN	1,775,153	0.60%	159,999	1.09%	180
Bowling Green, KY	212,464	0.07%	14,486	0.10%	136
Jackson, TN	204,573	0.07%	12,052	0.08%	118
Oklahoma City, OK	1,658,435	0.56%	96,442	0.66%	116
Corpus Christi, TX	564,305	0.19%	32,307	0.22%	114
Atlanta, GA	5,513,192	1.88%	304,876	2.08%	111
Macon, GA	611,956	0.21%	32,772	0.22%	107
Panama City, FL	338,282	0.12%	18,066	0.12%	107
Joplin-Pittsburg, MO-KS	394,145	0.13%	20,072	0.14%	102
Montgomery (Selma), AL	634,490	0.22%	29,610	0.20%	93
Peoria-Bloomington, IL	625,093	0.21%	28,681	0.20%	92
Augusta, GA	654,048	0.22%	29,546	0.20%	90
La Crosse-Eau Claire, WI	578,259	0.20%	26,089	0.18%	90
Sioux Falls (Mitchell), SD	635,337	0.22%	27,331	0.19%	86

2003-2004 DMA Business Development Index for Louisiana

City (DMA) of Origin	Population	Percent Population	Total Average Visitors	2003-2004 Percent Visitors	INDEX
Tampa-St.Petersburg (Sarasota), FL	3,904,593	1.33%	159,348	1.08%	82
Kansas City, MO-KS	2,222,040	0.76%	89,343	0.61%	80
West Palm Beach-Ft. Pierce, FL	1,698,804	0.58%	67,584	0.46%	80
Paducah-Cape Girardeau-Harrisbrg-Mt Vernon,KY-MO-IL	997,299	0.34%	37,926	0.26%	76
Ft. Smith-Fayetteville-Springdale-Rodgers, AR	685,011	0.23%	25,240	0.17%	74
Gainesville, FL	297,834	0.10%	10,920	0.07%	73
San Angelo, TX	142,427	0.05%	5,197	0.04%	73
Nashville, TN	2,311,251	0.79%	80,922	0.55%	70
Missoula, MT	257,862	0.09%	8,957	0.06%	69
Tallahassee-Thomasville, FL-GA	670,122	0.23%	22,799	0.16%	68
Greenville-Spartanburg-Asheville-Anderson, SC-NC	2,013,526	0.69%	63,504	0.43%	63
Tucson (Sierra Vista), AZ	1,068,960	0.36%	32,316	0.22%	60
Lincoln & Hastings-Kearny, NE	688,125	0.23%	20,406	0.14%	59
Knoxville, TN	1,224,833	0.42%	35,837	0.24%	58
Las Vegas, NV	1,609,905	0.55%	46,577	0.32%	58
Miami-Ft. Lauderdale, FL	4,147,101	1.41%	116,694	0.79%	56

PRIZM CLUSTER DEVELOPMENT INDEX

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

2004 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
PARK BENCH SENIORS	5,124	0.77%	191	1.81%	234
UPWARD BOUND	17,365	2.62%	623	5.90%	226
BIG SKY FAMILIES	15,598	2.35%	483	4.57%	195
AMERICAN CLASSICS	4,480	0.68%	125	1.19%	176
CROSSROADS VILLAGERS	7,493	1.13%	199	1.89%	167
BLUE BLOOD ESTATES	10,248	1.54%	266	2.52%	163
CITY ROOTS	3,212	0.48%	81	0.77%	158
MOBILITY BLUES	5,854	0.88%	143	1.35%	153
BOHEMIAN MIX	10,947	1.65%	262	2.48%	150
NEW HOMESTEADERS	17,784	2.68%	410	3.88%	145
SUBURBAN SPRAWL	7,684	1.16%	170	1.61%	139
URBAN ACHIEVERS	8,882	1.34%	189	1.79%	133
FAST-TRACK FAMILIES	24,134	3.64%	507	4.80%	132
BLUE-CHIP BLUES	7,999	1.21%	168	1.59%	132
KID COUNTRY, USA	9,553	1.44%	200	1.89%	131
OLD GLORIES	3,892	0.59%	81	0.77%	131
BEDROCK AMERICA	9,739	1.47%	201	1.91%	130
MIDDLEBURG MANAGERS	12,637	1.90%	251	2.38%	125
HOME SWEET HOME	13,061	1.97%	258	2.44%	124
KIDS & CUL-DE-SACS	15,155	2.28%	299	2.83%	124
URBAN ELDERS	4,111	0.62%	79	0.75%	120
BRITE LITES, LI'L CITY	14,158	2.13%	270	2.56%	120
SUBURBAN PIONEERS	4,341	0.65%	80	0.76%	116
COUNTRY SQUIRES	23,325	3.52%	420	3.98%	113
BELTWAY BOOMERS	8,248	1.24%	146	1.38%	111
WINNER'S CIRCLE	12,477	1.88%	218	2.07%	110
DOMESTIC DUOS	6,486	0.98%	112	1.06%	109
SUNSET CITY BLUES	9,763	1.47%	165	1.57%	106
OLD MILLTOWNS	7,170	1.08%	120	1.14%	105

2004 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
BIG CITY BLUES	3,656	0.55%	59	0.56%	101
SECOND CITY ELITE	11,495	1.73%	182	1.72%	99
GOD'S COUNTRY	13,444	2.03%	203	1.93%	95
YOUNG INFLUENTIALS	8,926	1.35%	134	1.27%	94
WHITE PICKET FENCES	8,983	1.35%	132	1.25%	92
EXECUTIVE SUITES	8,336	1.26%	122	1.16%	92
SHOTGUNS & PICKUPS	12,117	1.83%	176	1.67%	91
HOMETOWN RETIRED	4,884	0.74%	71	0.67%	91
BIG FISH, SMALL POND	18,938	2.85%	265	2.51%	88
MULTI-CULTI MOSAIC	6,282	0.95%	82	0.77%	82
MOVERS & SHAKERS	13,105	1.97%	166	1.58%	80
UPPER CRUST	12,765	1.92%	161	1.53%	79
NEW BEGINNINGS	5,981	0.90%	75	0.71%	78
GOLDEN PONDS	9,393	1.42%	113	1.07%	75
UP-AND-COMERS	8,003	1.21%	94	0.89%	74
TRADITIONAL TIMES	19,120	2.88%	220	2.09%	72
GRAY POWER	7,155	1.08%	81	0.76%	71
FAMILY THRIFTS	7,025	1.06%	76	0.72%	68
NEW EMPTY NESTS	8,214	1.24%	88	0.84%	68
SIMPLE PLEASURES	16,318	2.46%	174	1.65%	67
COUNTRY CASUALS	12,810	1.93%	132	1.25%	65
YOUNG & RUSTIC	11,880	1.79%	119	1.12%	63
GREENBELT SPORTS	11,088	1.67%	98	0.93%	56
AMERICAN DREAMS	11,563	1.74%	98	0.93%	53
MONEY & BRAINS	16,239	2.45%	137	1.29%	53
YOUNG DIGERATI	9,274	1.40%	78	0.74%	53
BACK COUNTRY FOLKS	11,771	1.77%	94	0.89%	50
POOLS & PATIOS	9,309	1.40%	74	0.70%	50
HEARTLANDERS	12,289	1.85%	94	0.89%	48
BOOMTOWN SINGLES	5,730	0.86%	36	0.34%	39
RED, WHITE & BLUES	5,879	0.89%	35	0.33%	38
THE COSMOPOLITANS	7,514	1.13%	43	0.41%	36
CLOSE-IN COUPLES	4,725	0.71%	26	0.24%	34

* Percentages are rounded to one decimal place.

CITY VOLUME ESTIMATES

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

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

2004 Non-resident Visitor Volume Estimates for Louisiana Cities

City	Volume Percent*	Volume Count	Estimated Additional Volume **	Adjusted City Volume
New Orleans	45.2%	6,325,000	1,350,000	7,675,000
Shreveport-Bossier City	12.2%	1,713,000	365,000	2,078,000
Baton Rouge	6.7%	941,000	201,000	1,142,000
Lake Charles	6.8%	958,000	204,000	1,162,000
Lafayette	2.9%	406,000	87,000	493,000
Monroe	1.7%	237,000	51,000	288,000
Alexandria	1.0%	141,000	30,000	171,000

* Percent of the 13,990,000 non-resident person-trips that listed a city.

** Percent of person-trips to that city multiplied by the number of Louisiana trips that did not include a city designation (2,985,000).

2004 Resident Visitor Volume Estimates for Louisiana Cities

City	Volume Percent*	Volume Count	Estimated Additional Volume **	Adjusted City Volume
New Orleans	26.5%	1,538,000	230,000	1,768,000
Shreveport-Bossier City	7.7%	447,000	67,000	514,000
Baton Rouge	8.4%	490,000	73,000	563,000
Lake Charles	5.0%	289,000	43,000	332,000
Lafayette	10.7%	621,000	93,000	714,000
Monroe	2.3%	135,000	20,000	155,000
Alexandria	3.1%	182,000	27,000	209,000

* Percent of the 5,804,000 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 (868,000).

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