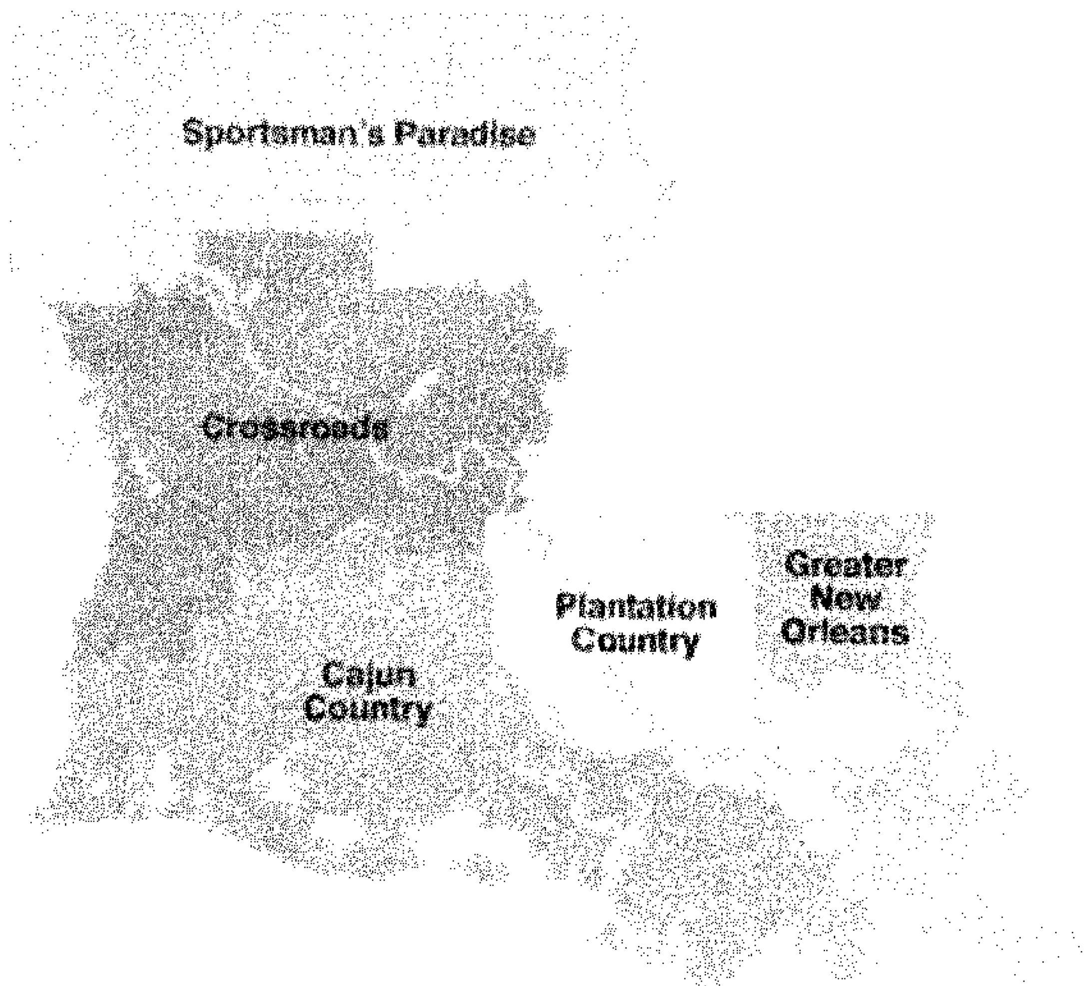
LOUISIANA ATTRACTIONS—TRENDS AND OPPORTUNITIES

Final Report

by Michael M. Liffmann and Brenda R. Henning



Louisiana Sea Grant College Program
Office of Sea Grant Development
Louisiana State University
Baton Rouge, LA 70803

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Sea Grant
LOUISIANA

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Communications Office
Wetland Resources Building
Louisiana State University
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EXECUTIVE SUMMARY

This executive summary highlights the results of survey and literature research conducted by the Louisiana Sea Grant College Program at Louisiana State University (Sea Grant) under contract with the Office of Tourism of the Department of Culture, Recreation, and Tourism (OT). The project, entitled *Louisiana Attractions—Trends and Opportunities*, was conducted between the latter part of 1998 and early 1999, and its primary purpose was to investigate the factors affecting attendance at Louisiana's 320 public and private attractions. This project stemmed from concern expressed by many members of the Louisiana Attractions Association (LAA) and Louisiana Travel Promotion Association (LTPA) that despite the industry's overall gains in the last decade or so, attendance at many attractions had declined or remained constant in recent years.

SURVEY AND HIGHLIGHTS OF RESULTS

In a recent report entitled, "An Analysis of Louisiana Tourism Advertising Promotion," Professor William Oakland of Tulane University and Oakland Econometrics, noted that tourism in the state expanded by more than 55 percent since 1988, but experienced an uncharacteristic decline in 1998. The state's 1998 performance has been the subject of much discussion by tourism leaders and attractions operators, and some have expressed concern that the 1998 statistics might reflect a declining trend that had begun two years earlier. Others, such as Dr. Oakland and state Office of Tourism leaders, are of the opinion that 1998 was merely a temporary phenomenon that will be reversed after 1999.

Three separate questionnaires were designed and mailed in the fall of 1998, one for the state's 18 casinos and racetracks, one for the remaining 302 attractions, and one for the state's 10 welcome centers. A total of 168 attractions completed questionnaires for a response rate of 53%. Almost 60 percent were private attractions. Nearly a third of the respondents were from Cajun Country, and each of the four other tourism regions accounted for 14 to 19 percent of the total responses. Twenty-nine responses were received from supervisors and staff members of the state's welcome centers.

In addition, key attractions in each of the state's tourism regions were selected for personal interviews. A few of the responding attractions—those that provided a particularly distinct insight into the recent situation—were interviewed as were several of the more prominent non-respondents.

The top three responses given for attendance gains were more advertising, improvements made to facility/site, and trends that reflected more out-of-state visitors. Those attractions experiencing attendance declines noted that the top three factors were weather-related occurrences, renovation or construction, and competition from other attractions. Outside of Louisiana, the top three states of origin for U.S. visitors were Texas, Mississippi, and Arkansas. France, Germany, and Canada were the top three countries of origin for international visitors.

Effects on Visitations

The questionnaire also included 18 statements on a variety of issues relating to visitations, the state's advertising efforts, visitor volumes, and the quality of the attractions. The respondents were asked to react to the statements by strongly or moderately agreeing, disagreeing, or having no opinion. Sixty percent of the public and private respondents indicated that Louisiana's casinos and/or riverboats had not helped bring additional visitors to their attractions. Forty-five percent did not think that Mississippi's casinos had lured visitors away from their attraction and over a third had no opinion. Only 20 percent, statewide, felt that Mississippi casinos had diverted visitors away from their attractions.

One-half of the responding casinos and racetracks had no opinion regarding whether Louisiana's parks, museums, and attractions had helped increase visitations to their sites. Nearly 60 percent of the casinos and racetracks felt that Mississippi's casinos were diverting customers from their attractions. Personnel at the state welcome centers are of the opinion (62 percent) that while Louisiana's casinos and/or riverboats have helped increase visitations, Mississippi's casinos have diverted visitors from the state's attractions (52 percent of respondents).

Most respondents (almost 70 percent of the attractions and 60 percent of the casinos and racetracks) agreed that the strong national economic picture, and the state's economic rebound had a great deal to do with the increases in numbers of visitors.

Over three-fourths of the attractions and casinos and racetracks did not feel, or had no opinion, that recent news stories that gave Louisiana a negative image (crime and safety, *Dateline*, etc.) had caused a decrease in visitations. This is in stark contrast with welcome center personnel, where 70 percent of the respondents felt that visitations to their region had declined as a result of the negative publicity.

Opinions Concerning the State's Advertising Efforts

A considerable amount of public funds have been invested over the course of the last decade in the state's promotional efforts. Attractions were asked to comment on these efforts and possible impacts on their operations. There is a statewide consensus among the attractions that the state's advertising campaigns have converted to more visitors at the attractions. This opinion, however, is not shared by the responding casinos and racetracks. International promotion has been a departmental priority for several years. Sixty percent of the statewide respondents felt that OT is doing enough, while the nine casinos and racetracks were equally divided in their opinions.

Over half of the statewide respondents felt that more funds need to be expended to attract international visitors. Most casinos and racetracks disagreed or had no opinion. Over half of the attractions also felt that changes in the state's advertising strategies were needed to improve attendance. Over half of the casinos had no opinion on this matter. Most respondents felt quite strongly that more coordination and cooperation is needed between them and the state's efforts. The state welcome centers are frequently the front line that greets out-of-state visitors. Over 80 percent of the staff respondents (compared to 62 percent of the attractions) felt that advertising efforts had helped increase visitors to their particular region. Only one-third of the state's welcome center personnel was of the opinion that more state funds need to be expended to attract international visitors. A similar amount had no opinion or disagreed. Over 90 percent of the respondents felt that Louisiana should be concerned about visitor volumes to its attractions, and that the state initiate more coordination and cooperation between attractions and the welcome centers.

Visitor Volumes

Visitor volumes are of concern to over 60 percent of all attractions, and almost 80 percent of the casinos and racetracks. By a large majority, attractions, including casinos and racetracks, want tc see increases in visitor volumes. Although growth in visitor volumes is desired, it is not essentia for most attractions to remain open. Private attractions, however, were considerably more concerned about visitor volumes than their public counterparts.

There appears to be some skepticism regarding tourism growth statistics among all attractions, although less so among the casinos and racetracks. Only about a third of the respondents felt tha tourism growth had been as sizable as had been publicized.

Quality of the Attractions

Over 90 percent of the respondents are satisfied with the quality of their attraction, and nearly 80 percent felt that their attraction was in great shape. All they need is help with promotion. Statewide, with the exception of the opinions of casinos and racetracks, there appears to be little concern among attractions for nearby, like-competition. Nearly 90 percent of the state's attractions responded affirmatively to the statement that they wanted to improve their attraction's appeal to gain more visitors.

Although 53 percent of the attractions responded by completing and returning the questionnaire, the data furnished by the respondents concerning visitor volumes, by year, can be labeled as "spotty," at best. Attractions were asked to furnish an annual number of visitors beginning in 1988 or the first year they opened, if this took place after 1988. We can, however, point to what appear to be period-specific (1988 and 1997; 1994 and 1997; 1996 and 1997) patterns of increases, decreases, or little, if any, change. There are some general indications, for instance, that the number of visitors to most plantations and other historical and cultural places may have peaked in the mid-1990s. Swamp tours, on the other hand, continue to benefit from tourism's growth.

GENERAL OBSERVATIONS AND CONCLUSIONS

At first glance, statewide, public and private attractions appear to be pleased with the overall growth trends experienced in the last decade or so, and are satisfied with the quality of the attractions and the experiences enjoyed by their visitors. This coupled with the continued good national and state economic news, plus special events such as FrancoFête and the preparations for the celebration of the 200th anniversary of the Louisiana Purchase in 2003, the opening of a new phase of the Ernest N. Morial Convention Center in New Orleans, improvements and expansions to meeting and convention facilities in other cities, and new attractions are cause for optimism among tourism leaders. But this optimistic outlook is somewhat tempered by the concerns expressed by several private attractions, notably plantations, museums and other historical places. There are valid concerns over recent (last two years) declines in attendance due to fewer motorcoach visits and/or fewer walk-ins. This information could not be readily gleaned from the responses to the mailed questionnaire, and to this end, Sea Grant and OT conducted 42 field interviews with selected attractions and Convention and Visitor Bureaus/Tourist Commissions (CVBs/TCs). This interview process led to the conclusion that there is a decided undercurrent of apprehension and uncertainty about the future.

There are some early warning signs that Louisiana's tourism industry is entering a stage of maturity after 12-15 years of rapid expansion and development, and the state's attractions face some major challenges. They are confronted with several key external factors, most of which are linked. These factors will continue to affect competitiveness: consumer preferences, product life cycles, competitive forces, and changing demographics—both in and outside the state.

Consumer Preferences and Product Life Cycles

The tourism marketplace is undeniably dynamic, and no attraction can escape this fact. Change is inexorable, and in this industry, the consumer rules. Tourists now expect and demand more because they have become experienced travelers. Their tastes, values, and interests are constantly changing, and they can discern quality. They will not be satisfied with second-rate attractions or services and demand authenticity. As a result, new tourism products, in our state and elsewhere pose serious competition for older and dated tourism products. Changing circumstances can quickly erode an established market. Successful attractions that become complacent and ignore what the customer demands and the external forces that are driving the market risk stagnation and an eventual downturn. Attractions need to carefully evaluate their product lines and either revitalize/refresh or reinvent them.

Every product, tourism or otherwise, goes through stages of a life cycle: a period of growth, a peak of maturity, and an eventual decline. But these cycles differ in their speed of development and total life expectancies. The strategies to prolong, adapt, or change each of the stages result from an evolution of the visitors' perceptions and from changing competitive markets.

External and Internal Competition

Competition for visitors is intense and will only intensify with time. The state's attractions confront growing, changing, and volatile markets. They face countless external as well as internal, to Louisiana, competitors. External competitors include nearby states, international destinations, as well as other states for international visitors.

The nearby states of Mississippi, Texas, Florida, Arkansas, and Alabama compete intensely with Louisiana for visitors. They, too, have over the last decade or so sensed the opportunity for growth and made some major investments in their promotional budgets. On a percentage basis, most have exceeded Louisiana's rate of change. Mississippi's competition is indeed formidable, particularly on the Gulf Coast where what had been resort communities in serious disrepair and decline were converted into boom areas with the introduction of dockside-gambling in 1992. New Orleans and Plantation Country attractions in particular need to remain on guard and constantly review their marketing strategies and plans, and perhaps include more collaborative efforts among themselves and with Mississippi properties.

From all indications, Florida's tourism forecast is also very bright. "Visit Florida" is aggressively promoting the state, and the forecasts are for steady increases in visitation and revenues. In Texas, new attractions are being planned and built throughout that state, particularly close to the metropolitan areas that have traditionally helped supply Louisiana with about a fourth of its out-of-state visitors.

Louisiana also competes with international destinations. In 1997, the U.S. Department of Commerce reported that 21.6 million U.S. residents flew to overseas destinations. The real cost of travel has decreased over the years. For instance, it is remarkably economical to travel to Mexico during our summer months, and likewise very inexpensive to visit Europe in the winter.

Louisiana competes with 49 other states and international destinations for international travelers. International tourists spent $452 million in 1997 in Louisiana (USTDC, 1998), and this has become an important factor in the strength of the state's tourism industry. Economic and political developments in other countries are likely to affect the volume of inbound overseas travel, and in some instances this could have negative implications for Louisiana's share and volume of international visitors. An example, is the Canadian situation with the relative weakness of that country's dollar, and also Brazil, where Louisiana has been targeting marketing efforts but where the economic outlook remains quite unstable.

Louisiana has more attractions today than it ever had in the past! Approximately one-third of the responding attractions (51) began operations after 1990. An additional 40 opened their doors during the 1980s. More attractions have opened or announced opening dates since this survey was completed in early 1999, particularly in the New Orleans area.

This points to a dilution effect. Statistics indicate that Louisiana's tourism "pie" has grown substantially in the last decade. Tourist visitations grew rapidly from over 16 million in 1988 to nearly 26 million in 1997, an increase of over 55 percent. Louisiana's share of national and regional travel also increased, and travel related expenditures have grown accordingly. This growth created new private and public development opportunities, i.e, attractions, which in turn have come to share in the growing tourism pie, which has meant smaller slices for many! Those particularly affected have been cultural and historic attractions, notably plantations and historic homes. Many private attractions have also expressed concern over the establishment of and possible competition from in-state, public attractions.

Traditional forms of tourism, such as attractions, also face stiff competition for the disposable dollar from other leisure products—recreation and other forms of entertainment, such as movies, sporting events, and gaming. Activities such as shopping that were once considered a part of non-leisure time are being converted into a leisure experience.

Changing Demographics

Important demographic changes taking place during the 1990s and early next century are likely to affect the demand for certain product lines. The Canadian Tourism Research Institute (CTRI) released a report in 1997 entitled *Travel Forecast 2000*, and provided important perspectives on leisure travel for the first part of the 21st century. Tourists in the year 2000 will be much more experienced travelers, more adventurous than earlier ones, and will expect more out of their vacations than past generations. Baby boomers seek not only "active relaxation" and entertainment when they travel, they also want to learn new things. And because there are so many, they will be pampered by providers. By the year 2016, "empty-nesters" who are mortgage and kid-free will make up almost a third of family households. In addition, over the next 20 years or so, baby boomers stand to inherit as much as a trillion dollars from the previous generation. They will be looking for ways to spend the money, and most assuredly tourism markets will be deluging them with new products and services.

The adventurous, educational, hassle-free, and activity-oriented expectations of baby boomers do not bode well for those attractions whose product lines can be labeled as "been there, done that." Tour companies are anxious to design new, more unusual trips that have a distinct learning or interpretation element. Cultural and natural heritage tourism will continue to grow even more during the early part of the next century because travelers are becoming more interested in being closer to the environment and learning about local peoples and their cultures. In addition to adventurous travel, there are some low risk types of travel that are also expected to do quite well among the well traveled baby boomers: cruises and all-inclusive resorts. Gaming is also likely to become more popular as this generation ages and phases out of active travel.

The motor coach industry is repositioning itself in a changing marketplace. This industry is also facing considerable competition and consolidation, and is feeling the effects of changing demographics. The new seniors—leading edge of baby boomers—have needs and desires that are different from traditional tour clientele. Baby boomers have a greater interest in individual versus escorted tours. They are also looking for greater variety, new attractions and new itineraries, in other words, an "organized independence" much like cruise ships and all-inclusive resorts.

RESPONSE STRATEGIES

Attractions Need to Revisit Their Product Line

Louisiana's attractions have the daunting challenge of having to survive and thrive in an extremely competitive and dynamic marketplace, particularly when many of their offerings are at or near the mature phase of the product cycle. In order to do this, they must first become extremely introspective and realistic, and conduct an objective assessment of their product lines. Each attraction, for each of their tourism products, should (1) determine what particular stage the product is in; (2) where they would place the attraction in the overall cycle, and (3) what they are doing to introduce new products into the first stage, market development, of the cycle.

Attractions Need to Revisit Their Marketing Strategies

Marketing is much more than selling, and promotion should only take a fraction of the marketing resources that are actually expended. Marketing involves ongoing research and planning about new and target markets, customer attitudes, and preferences. All are needed in order to provide new products and remain "fresh" and competitive. Similar attractions can be more than local or regional rivals; they can be representatives of your business, sources of new ideas, and partners in development. In fact, considerable effort should be devoted to cooperating more closely with other like-attractions.

Some attractions still subscribe to the notion that tourism marketing is the purview of the state or CVB/TC. Do not leave it up to others. Each of these entities has a distinct marketing responsibility. The state is charged with attracting visitors to Louisiana. The CVBs/TCs try to lure those visitors to their cities, towns, and parishes, but the attractions are responsible for assuring that the visitors to those communities walk through their doors and gates.

More Regional Activism in Marketing

The majority of smaller attractions have minimal marketing budgets. Most cannot afford to market effectively alone and rely heavily on larger partners and marketing cooperative organizations such as the LTPA to help stretch their resources. But additional activism is needed. Marketing alliances can be established under the auspices of CVBs and TCs. Perhaps regional chapters of the LAA should be established.

Attractions Need More Vigilance and Research Information

The marketplace is ever-changing and most attractions lack the necessary staff and budgets to remain abreast. Yet, they need the information. Over the years the LTPA and the Research Division of the OT have attempted to fill this gap through publications, newsletters, bulletins, conferences, seminars, and workshops. But more is needed, particularly when one considers the dynamics of the tourism marketplace—demographic trends, information technology, new tourism products, motor coaches, etc. There are constant changes in the identity of visitors, their tastes, values, and interests. There are changes also in the kinds, types, and levels of competition, changes in the consumer culture and, of course, issues such as the political and economic realities that are in constant flux.

Additional training programs sponsored by the LTPA, LAA and OT would also be of great help, but require that attractions attend and contribute to the discussions. The Office of Tourism should increase its research efforts and redouble its attractions' outreach efforts.

There is a need for visionary thinking in the state on tourism-related matters. The industry is facing mounting competition from multiple fronts. Sea Grant suggests the creation of a university-based "Tourism Think Tank," whose primary goal would be to conduct advanced research into trends affecting the state's industry as a whole. The "Think Tank's" research products would then support advanced planning efforts. An industry advisory council would be established to provide guidance and support.

Sea Grant proposes to take the lead by convening a forum of Louisiana tourism leaders to determine if they share these views. If so, this topic might be the theme of a major conference, with presenters and debaters addressing questions and possible answers about travel, Louisiana, and the 21st century.

I. INTRODUCTION

This report contains the results of survey and literature research conducted by the Louisiana Sea Grant College Program at Louisiana State University (Sea Grant) under contract with the Office of Tourism of the Department of Culture, Recreation, and Tourism (OT). The project, entitled *Louisiana Attractions—Trends and Opportunities*, was conducted between the latter part of 1998 and early 1999, and its primary purpose was to investigate the factors affecting attendance at Louisiana's attractions. This project stemmed from concern expressed by many members of the Louisiana Attractions Association (LAA) and Louisiana Travel Promotion Association (LTPA) that despite the industry's overall gains in the last decade or so, attendance at many attractions had declined or remained constant in recent years.

Most of the attractions-specific information was collected using three separate questionnaires. In October 1999, one was mailed to the state's casinos and racetracks and the other to the remaining state attractions, both public and private. An additional questionnaire was sent to the Office of Tourism's State Welcome Centers in March 1999. This information was supplemented with extensive field interviews with selected attractions, convention and visitor bureaus (CVBs), and tourist commissions (TCs). In addition, recent tourism and marketing literature was reviewed and the Internet was searched extensively.

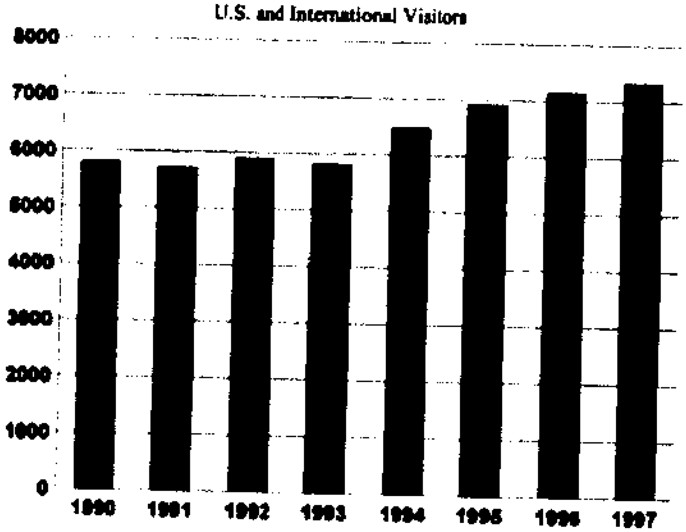
For the purposes of this study, attractions were defined as those public and private places in the state that draw tourists to a given community or region, and serve as the focus of the activity in which a visitor wants to engage. Attractions can be man-made, natural, ethnic/cultural, or historical. Restaurants, bed and breakfasts, and live music venues were not included in this survey, although Sea Grant recognizes that many of these types of Louisiana establishments are often the focus of travelers' interests. It is also important that "public" and "private" attractions be distinguished. This study defined "public" attractions as those that are (1) owned and managed by a governmental agency, or those that are (2) privately owned, but managed by a public entity. "Private" attractions are those that are (1) privately owned and managed, or (2) publicly owned, but privately managed, or are (3) private, non-profit corporations.

Three hundred and twenty attractions were identified statewide. The primary sources for this comprehensive list were the *1997 and 1998 Louisiana Tour Guide* issued by the LTPA and OT. Earlier tour guides were also consulted for additional names. Detailed addresses and names of contact persons were provided by the LAA, the Louisiana Association of Museums (LAM), the National Parks Service (NPS), the U.S. Fish and Wildlife Service (USFWS), and the Office of State Parks (OSP). An earlier Sea Grant survey of Louisiana's swamp tour operations was also consulted.

II. LOUISIANA'S TOURISM DEVELOPMENT IN THE 1990s

It is a well known fact, that tourism has made a significant impact on both the U.S. and Louisiana economies. In 1997, domestic and international travel expenditures in the U.S. reached over $480 billion dollars, and the forecast for 1998 was in excess of $500 billion. During the last decade, the tourism industry has become the nation's second largest employer providing jobs for over seven million in 1997 (TIA). The most recent U.S. Travel Data Center (USTDC) figures indicate that total direct travel expenditures in Louisiana for 1997 exceeded $7.3 billion dollars and travel generated 103,400 jobs for the state. The 1990-1997 domestic and international travel-related expenditures in Louisiana, adjusted to 1997 dollars, appear in Figure 1. Shown in Figure 2 are payroll, state and local taxes and in Figure 3, employment.

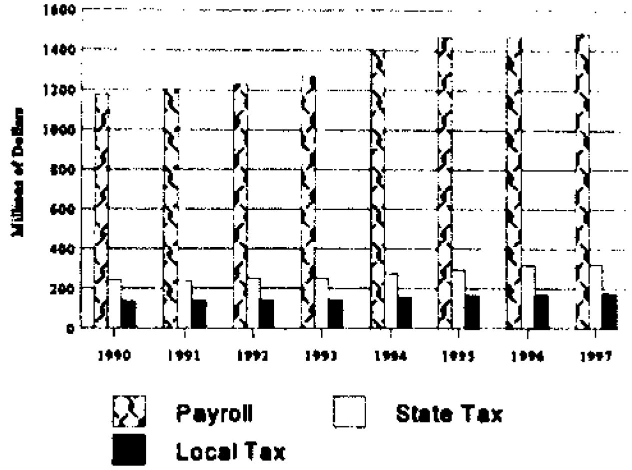
Figure 1. Travel-Related Expenditures in Louisiana, 1990-97
U.S. and International Visitors



Note: Amount adjusted to 1997 dollars using CPI.
Source: U.S. Travel Data Center, 1990-1997.

Figure 2. Travel-Generated Payroll, State & Local Taxes in LA, 1990-1997

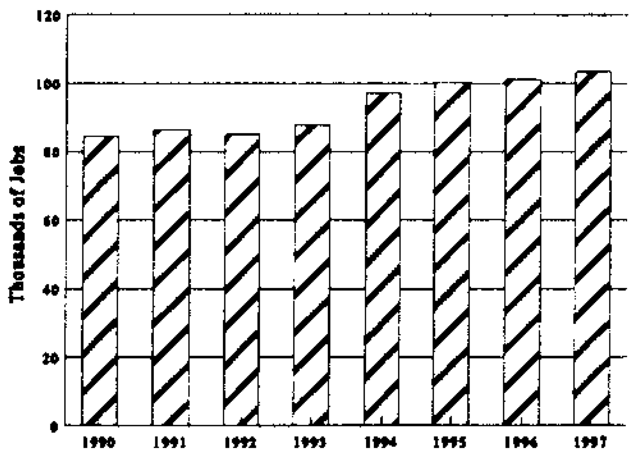
U.S. and International Visitors



Note: Amounts adjusted to 1997 dollars using CPI.
Source: U.S. Travel Data Center, 1990-1997

Figure 3. Travel-Generated Employment in Louisiana, 1990-1997

U.S. and International Visitors



Source: U.S. Travel Data Center, 1990-1997.

In a recent report entitled, "An Analysis of Louisiana Tourism Advertising Promotion", Professor William Oakland of Tulane University and Oakland Econometrics, noted that tourism in the state expanded by more than 55 percent since 1988 (from 16.4 million visitors in 1988 to 25.5 million in 1997), but experienced an uncharacteristic decline in 1998. Dr. Oakland attributes the steady increases to the public's greater propensity to travel, in general, and

Louisiana's capability to attract these travelers, in particular. Louisiana's growth has been much more rapid than that experienced at the national or in the southwest central region of the country. During the 1988-1997 period, the state's share of national travel increased from 1.71 percent to 1.95 percent, and its regional share grew from 13 percent to 18.5 percent (Oakland, 1999).

But the state's 1998 performance has been the subject of concern by many tourism leaders and attractions operators. National travel, according to Dr. Oakland's report, increased by six percent during the year, while Louisiana's decreased by five percent, thus wiping out the gains experienced in the past decade. Many of the leaders of the LAA expressed concern that 1998 statistics reflected a declining trend that had begun two years earlier. Others, such as Dr. Oakland and state Office of Tourism leaders, are of the opinion that 1998 was merely a temporary phenomenon that will be reversed in 1999, with FrancoFête, the expansion of the Ernest N. Morial Convention Center in New Orleans, the reopening of Harrah's Casino and other attractions, and continued national prosperity.

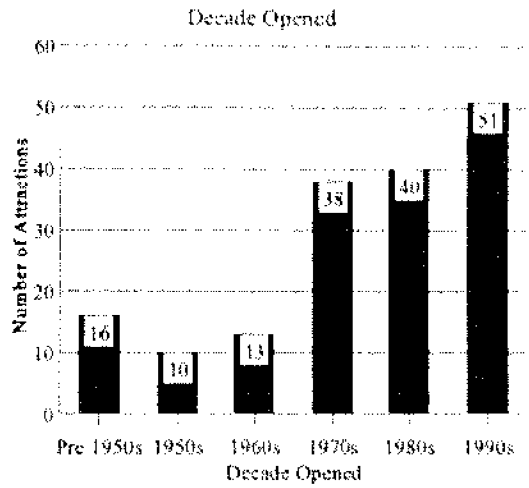
The issue is thus whether 1998 (and 1996 and 1997 in the opinion of many key attractions) will prove to be an aberration or whether the decade-long, overall growth trend can be sustained beyond 1999. Dr. Oakland projected that Louisiana travel will grow to 26.6 million visitors by the year 2002, an increase of almost 10 percent over the 1998 level. The annual growth rate is projected to be slower based on a projected slowdown in national travel growth.

The growth in tourism as shown by the above figures has had distinct local effects. The number of tourist commissions has increased from approximately 40 in 1990 to 56 in 1998, and enlightened local leadership has helped mobilize many communities to capitalize on the positive economic effects of this industry. Many local and regional initiatives have resulted in the establishment of communications and marketing networks to organize, coordinate, and promote tourism development activities. These, in turn, have enabled entrepreneurs to produce the vast majority of new tourism-related jobs and added income.


Rip Van Winkle Gardens Gift Shop

Tourism, based largely on New Orleans and the state's many other natural, historical, and cultural heritage attractions, has enabled Louisiana to diversify its economic base. Many of the state's 320 attractions are relatively new. Ninety-one of the 168 respondents to the survey reported opening for business in the 1980s and 1990s. In fact, almost a third of the responding attractions opened during this decade (Figure 4).

Figure 4. 1998 Attractions Survey Respondents



Note: Not all respondents included an opening date. Missing information was provided by LTPA

Source: Louisiana Sea Grant, 1999

The aforementioned recent declines in attendance at several key attractions have caused concern, and there is some clearly stated apprehension about the future. Several reasons have been suggested for the declines, but specific data have not been readily available to determine (1) how many attractions have actually experienced a downturn in attendance and revenues, and (2) the magnitude of the decline. The only attendance information that is readily available is the *Louisiana Travel Pulse*, a quarterly publication compiled by the OT's Division of Research. These figures are volunteered by a few attractions, not furnished on a consistent basis, and are thus not comparable from year-to-year. They merely provide a barometer or pulse of the reported activity.

One of the expressed objectives of the Sea Grant survey of the 320 attractions was to provide an actual measurement of change in attendance.

III. METHODS

The following section describes the procedures followed for developing the three questionnaires, and the process used for collecting and analyzing data and supplementing this information through personal interviews and literature searches.

A. Questionnaire and Survey Process

Three separate questionnaires (Appendix 1) were designed, one for the state's 18 casinos and racetracks, one for the remaining 302 attractions, and one for the state's 10 welcome centers.

The primary focus of the questions revolved around determining:

- attendance during each of the last 10 years or since established, if less than 10 years;
- changes in the number of in-state versus out-of-state travelers;
- changes in seasonal visitation patterns;
- changes to the attractions in the last 10 years or since they were established, if less than 10 years (e.g. new activities, added physical features, more personnel, etc.)
- perception of trends/events (local, state, national, and international) that would have caused such changes;
- ideas concerning what needs to be done to improve attendance.

The LAA, LTPA, OT, OSP, and Casino Association of Louisiana (CAL) all contributed to the design of the survey instruments. The casino and racetrack instrument was reviewed by CAL, while the instrument proposed for the other attractions was reviewed by the LTPA and LAA and pretested in early September 1998 at three Baton Rouge area attractions. Changes to both questionnaires were made based on questionnaire shortcomings identified during the pre-test phase of the process. It was noted by two of the pre-testers that the survey was lengthy and would not receive the attention needed unless a sense of urgency accompanied the request for a prompt response.

In order to address this issue, Lt. Governor Kathleen Blanco mailed a letter on September 17, 1998 to all identified attractions stressing the importance of the research and asking for their participation in promptly completing and returning the questionnaire. A cover letter from Mr. Tim Hemphill, then Executive Director of the CAL, accompanied the questionnaire to casino managers. Ms. Elinor Craven, Director of Outreach with the OSP, mailed a similar letter to state park and commemorative area managers. A letter signed by Mr. Danny Young, LTPA's Executive Director, and Ms. Stacy Atkins, then President of LAA, accompanied the remaining questionnaires.

The questionnaires to attractions were mailed on October 5th and 6th, 1998. A cover letter and a self-addressed stamped envelope were enclosed following the method prescribed by Dillman in *Mail and Telephone Surveys, The Total Design Method.* Eight were returned as undeliverable, and a follow-up was unsuccessful in locating a correct mailing address. For those who had not responded, a follow up letter and questionnaire were mailed on October 30, 1998. A total of 168 completed questionnaires were returned to Sea Grant for a response rate of 53%.

Key attractions in each of the state's tourism regions were selected for personal interviews. A few of the responding attractions—those that provide a particularly distinct insight into the recent situation—were interviewed as were several of the more prominent non-respondents. Between December 1998 and February 1999, Sea Grant and OT personally visited with 32 attractions and used open-ended questions to determine trends with visitor volumes, perceptions of what had affected attendance, and obtained their opinions regarding the state's marketing efforts and competition. Ten CVBs and TCs provided additional input.

B. Analysis and Observations

A series of tables detailing regional reactions to specific statements appear in Appendix II. The data are presented in a format that enables readers to compare statewide and regional response totals, as well as public and private sector differences/similarities. In addition, and in order to avoid disclosure problems, most private attractions were combined into several categories, namely plantations and other historical and cultural attractions (47 respondents), swamp tours (27 respondents), and casinos and racetracks (9). At the end of this section there is also a discussion of the 29 responses received from state welcome center personnel, and how their perceptions are similar or different to those of the attractions as a whole.

Nearly 60 percent of the respondents to the survey were private attractions (Figure 5). The only region where public respondents were nearly twice as frequent as private ones was in Sportsman's Paradise, an area with a large number of state-owned and operated parks and commemorative areas and other public attractions.

Figure 5. Public/Private Attractions' Mix of Respondents

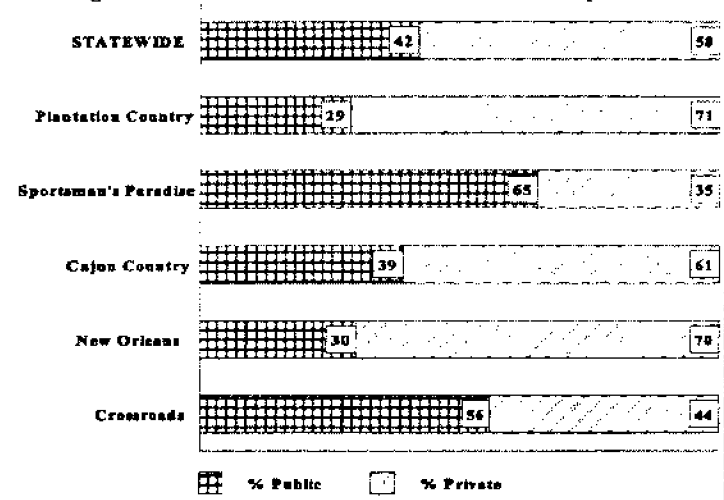
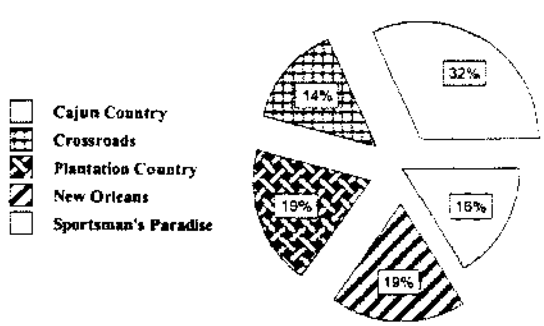


Figure 6 provides a regional breakdown of the respondents. Nearly a third of the respondents were from Cajun Country, and each of the four other tourism regions accounted for 14 to 19 percent of the total responses.

Figure 6. Responses Per Region



1. Statewide Results

Several questions of a general nature were asked of all attractions. Some of the more significant responses appear below. The attractions that reported attendance gains or declines in the last 10 years, or since they began operations were asked to attribute the positive or negative changes to 10 factors and asked to check all those that applied.

The top three responses given for attendance gains were:

1. More advertising (65 respondents)
2. Improvements made to facility/site (63)
3. Out of state visitor trends (53)

Those experiencing attendance declines noted that the top three factors were:

1. Weather related occurrences (53)
2. Renovation or construction at or near my attraction (39)
3. Competition from other attractions (32)

Outside of Louisiana, the top three states of origin for U.S. visitors were Texas, Mississippi, and Arkansas. France, Germany, and Canada were the top three countries of origin for international visitors. Attractions were also asked if over the years they had observed any major changes in the mix of origin of the visitors. One hundred and forty responded to the question and 58 percent did not observe a change in the origin mix. Forty-two percent did experience such a change, and most noted that their mix had changed to more Louisianians and international visitors.

Almost all responded to another key section of the questionnaire which consisted of 18 statements designed to obtain agreement or disagreement with issues concerning trends and visitation patterns and the likely reasons for these. This was accomplished by using a scale from 1-5 as follows: 1 - Strongly Agree, 2 - Moderately agree, 3- No Opinion, 4 - Moderately Disagree, and 5 - Strongly Disagree. Respondents were asked to circle the number which best represented their opinion regarding each statement. The 18 statements were ultimately grouped into four categories for analyses purposes:

- Effects on visitations
- Opinions concerning the state's advertising efforts
- Visitor volumes
- Quality of the attractions

a. <u>Effects on Visitations</u>

Anecdotally, several attractions attributed the recent decline in visitors to the growth of casinos in Louisiana and Mississippi. This despite the fact that a recent study revealed that over 98 percent of the visitors to New Orleans and Baton Rouge riverboat casinos were local residents. In Shreveport-Bossier City, 56 percent are local and in Lake Charles, 35 percent. No residency figures are available for Mississippi or Indian reservation casinos (Louisiana Gaming Control Board 1999). In an attempt to establish whether or not this was a widespread opinion, all attractions, except the 18 casinos and racetracks, were asked to react to the following statements. The highlights of their responses are discussed immediately following the statement.

Casinos and/or riverboats in Louisiana have helped increase visitation to my attraction. Sixty percent of the public and private respondents, statewide, indicated that the Louisiana's casinos and/or riverboats had not helped attract additional visitors to their attractions.

-60 percent moderately/strongly disagree
-21 percent strongly/moderately agree
-19 percent had no opinion

Casinos in Mississippi have diverted visitors away from my attraction. Forty-five percent did not think that Mississippi's casinos had lured visitors away from their attractions and over a third had no opinion. Only 20 percent, statewide, felt that Mississippi casinos had diverted visitors away from their attractions.

-45 percent strongly/moderately disagree
-20 percent strongly/moderately agree
-34 percent had no opinion

There were distinct regional differences in these responses. New Orleans most closely mirrored the statewide sentiment (47 percent said that Mississippi casinos had not diverted and 33 percent had no opinion). Over half of Crossroads (52 percent), and 38 percent of Plantation Country felt that the casinos in that state had diverted visitors, whereas nearly three-fourths of the Sportsman's Paradise respondents (72 percent) had not felt the impact of the Mississippi facilities. Eighty-one percent of Cajun Country either had no opinion (43 percent) or felt that the Mississippi casinos had not diverted visitors (38 percent).

Casinos and racetracks were asked to respond to the following statements:

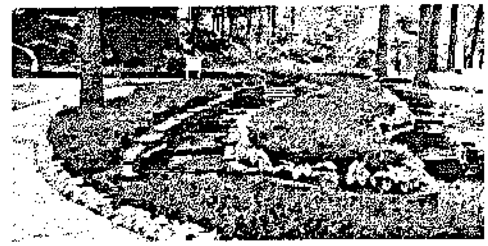
Louisiana's parks, museums and attractions have helped increase visitation to my site. One-half of the respondents had no opinion, and another 37 percent disagreed.

-37 percent strongly/moderately disagree
-13 percent strongly/moderately agree
-50 percent had no opinion

Gaming facilities in Mississippi are diverting potential customers from my site. The respondents had distinct opinions on this issue. Nearly 60 percent of the casinos and racetracks felt that Mississippi's casinos were diverting customers from their attraction.

Jean Lafitte National Historical Park
Barataria Unit
Courtesy Office of Tourism

-33 percent strongly/moderately disagree
-56 percent strongly/moderately agree
-11 percent had no opinion


Hodges Gardens
Courtesy LTPA

Travel and tourism are very susceptible to economic conditions. A prolonged period of national prosperity plus Louisiana's economic rebound from the late 1980s and early 1990s recession have created an environment that has been conducive to the industry's overall growth. This situation, however, has been tempered, in the opinion of many, by in-state events relating to crime, safety, and law enforcement which have given Louisiana a negative image. All attractions were asked to respond to the following statements.

National economic conditions have a lot to do with how many visitors I have during any given year. Most respondents (almost 70 percent of the attractions and 60 percent of the casinos and racetracks) agreed that the national economic picture has a great deal to do with the number of visitors.

-68 percent strongly/moderately agree; 56 percent casinos and racetracks
-14 percent strongly/moderately disagree; 22 percent casinos and racetracks
-18 percent had no opinion; 22 percent casinos and racetracks

My attraction has felt the impact of Louisiana's recent economic rebound. A similar consensus emerged concerning the improvements in the state's economy.

-63 percent strongly/moderately agree; 67 percent casinos and racetracks
-12 percent strongly/moderately disagree; 22 percent casinos and racetracks
-25 percent had no opinion; 11 percent casinos and racetracks

Recent news stories that gave Louisiana a negative image (crime and safety, Dateline, etc.) caused a decrease in visitations to my attraction. Over three-fourths of the attractions and casinos and racetracks did not feel, or had no opinion, that such negative stories had reduced the number of visitors to their attractions.

-23 percent strongly/moderately agree; 22 percent casinos and racetracks
-46 percent strongly/moderately disagree; 44 percent casinos and racetracks
-31 percent had no opinion; 33 percent casinos and racetracks

b. Louisiana's Advertising Efforts

A considerable amount of public funds have been invested over the course of the last decade in the state's promotional efforts. Attractions were asked to comment on these efforts and possible impacts on their operations.

The state's out-of-state advertising efforts have increased the number of visitors to my attraction. There is a statewide consensus among the attractions that the state's advertising campaigns have converted to more visitors at the attractions. This opinion, however, is not shared by the responding casinos and racetracks.

-62 percent strongly/moderately agree; 25 percent casinos and racetracks
-11 percent strongly/moderately disagree; 63 percent casinos and racetracks
-27 percent had no opinion; 12 percent casinos and racetracks

The Office of Tourism is doing enough to attract international visitors. International promotion has been a departmental priority for several years. Sixty percent of the statewide respondents felt that OT is doing enough, while the nine casinos and racetracks were equally divided in their opinions.

-60 percent strongly/moderately agree; 33 percent casinos and racetracks
-17 percent strongly/moderately disagree; 33 percent casinos and racetracks
-23 percent had no opinion; 33 percent casinos and racetracks

More state funds need to be expended to attract international visitors. Over half of the statewide respondents felt that more funds needed to be expended to attract international visitors. Most casinos and racetracks disagreed or had no opinion.

-53 percent strongly/moderately agree; 22 percent casinos and racetracks
-14 percent strongly/moderately disagree; 33 percent casinos and racetracks
-33 percent had no opinion; 44 percent casinos and racetracks

Changes are needed in the State's advertising to improve my attraction's attendance. Over half of the attractions also felt that changes in the state's advertising strategies were needed to improve attendance. Over half of the casinos had no opinion on this matter.

-51 percent strongly/moderately agree; 33 percent casinos and racetracks
-24 percent strongly/moderately disagree; 11 percent casinos and racetracks
-25 percent had no opinion; 56 percent casinos and racetracks

Global Wildlife Center
Courtesy Office of Tourism

There needs to be more coordination and cooperation between attractions like mine and Louisiana's tourism promotion efforts. Most respondents felt quite strongly that more coordination and cooperation was needed between them and the state's efforts.

-83 percent strongly/moderately agree; 67 percent casinos and racetracks
- 6 percent strongly/moderately disagree; 11 percent casinos and racetracks
-11 percent had no opinion; 22 percent casinos and racetracks

c. Visitor Volumes

I am not concerned about the current visitor volumes to my attraction. Visitor volumes are of concern to over 60 percent of all attractions, and almost 80 percent of the casinos and racetracks.

-28 percent strongly/moderately agree; 11 percent casinos and racetracks
-62 percent strongly/moderately disagree; 78 percent casinos and racetracks
-10 percent had no opinion; 11 percent casinos and racetracks

I do not believe that tourism growth has been as strong as has been publicized. There appears to be some skepticism regarding tourism growth statistics among all attractions, although less so among the casinos and racetracks. Only about a third of the respondents felt that tourism growth had been as sizable as had been publicized.

-33 percent strongly/moderately agree; 33 percent casinos and racetracks
-30 percent strongly/moderately disagree; 44 percent casinos and racetracks
-37 percent had no opinion; 22 percent casinos and racetracks

If the current visitor volume to my attraction does not change, I will be happy. By a large majority, attractions, including casinos and racetracks, want to see increases in visitor volumes.

-17 percent strongly/moderately agree; 11 percent casinos and racetracks
-70 percent strongly/moderately disagree; 67 percent casinos and racetracks
-13 percent had no opinion; 22 percent casinos and racetracks

The number of visitors to my attraction must grow in order to keep my attraction open. Although growth in visitor volumes is desired, it is not essential for most attractions to remain open. Private attractions, however, were considerably more concerned about visitor volumes than their public counterparts.

-36 percent strongly/moderately agree; 44 percent casinos and racetracks
-47 percent strongly/moderately disagree; 33 percent casinos and racetracks
-17 percent had no opinion; 22 percent casinos and racetracks


Rosewood Plantation

d. Quality of Attractions

I am satisfied with the quality of my attraction. It is clean, accessible, appealing, educational, fun, etc. Over 90 percent of the respondents are satisfied with the quality of their attraction.

-94 percent strongly/moderately agree; 89 percent casinos and racetracks
- 6 percent strongly/moderately disagree; 11 percent casinos and racetracks

My attraction is in great shape, and I have spent a great deal of money and time on it. I only need help in promoting my attraction to get more visitors. Nearly 80 percent felt that their attraction was in great shape, all they needed was help in promoting.

-79 percent strongly/moderately agree; 78 percent casinos and racetracks
-10 percent strongly/moderately disagree; 22 percent casinos and racetracks
-11 percent had no opinion; zero percent casinos and racetracks

There are quite a few attractions like mine in the general vicinity. This is not helping my operation. Statewide, with the exception of the opinions of casinos and racetracks, there appears to be little concern among attractions for nearby, like-competition.

-20 percent strongly/moderately agree; 33 percent casinos and racetracks
-68 percent strongly/moderately disagree; 33 percent casinos and racetracks
-12 percent had no opinion; 33 percent casinos and racetracks

I am interested in improving my attraction's appeal to gain more visitors. Nearly 90 percent of the state's attractions responded affirmatively to this statement.

-85 percent strongly/moderately agree; 89 percent casinos and racetracks
-8 percent strongly/moderately disagree; 11 percent casinos and racetracks
-8 percent had no opinion; zero percent casinos and racetracks

2. Visitation Trends at Selected Private Attractions

One of the study's stated objectives was to obtain visitor information to help determine attendance trends and the most affected attractions. Although 53 percent of the attractions responded by completing and returning the questionnaire, the data furnished by the respondents concerning visitor volumes, by year, can be labeled as "spotty," at best. Attractions were asked to furnish an annual number of visitors beginning in 1988 or the first year they opened, if this took place after 1988. Sea Grant, in consultation with OT, concluded that the uneven pattern and sometimes discrepant responses made it virtually impossible to conclude whether visitations to all attractions were increasing, decreasing, or stable. We can, however, point to what appear to be period-specific (1988 and 1997; 1994 and 1997; 1996 and 1997) patterns of increases, decreases, or little, if any, change.

Particular attention was given to plantations and other historical and cultural attractions as well as swamp tours. These attractions accounted for over 70 percent of the private sector responses to this survey.

a. Plantations and Other Historical and Cultural Attractions

To the extent that the following information can be extrapolated for attractions such as plantations and other historical and cultural places, there are some general indications that the number of visitors to these attractions may have peaked in the mid-1990s. Twenty-eight of the 46 respondents in this category responded entirely or partially to Question 12 ("In the table below, please provide the annual number of visitors to your attraction. If the attraction opened after 1988, please indicate the annual amount beginning with the year you opened.")

- Ten of the 28 reported visitors for both 1988 and 1997. Seven experienced visitor increases during the ten-year period, while two had declines, and one had a small change in volume.
- Twenty-one of the 28 reported visitor statistics for the years 1994 and 1997. Ten experienced increases during the four years, five decreased, and six remained stable.
- Twenty-six provided visitor figures for 1996 and 1997. Fourteen reported an increasing the number of visitors while seven had decreases and five reported small or no changes in volume.

Interviewees expressed concern over declines in the number of motorcoach tours. The respondents were asked in Question 13 to "...please provide us with the annual number of group tours to your attraction." Twenty-seven of the plantations and other historical places reported having group tour business during some years or during the entire period.

Shadows-on-the-Teche

- Eleven of the 27 reported having group tours at their attractions in both 1988 and 1997. During that span, seven experienced increases and two each had declines or very small changes.
- Nineteen reported groups for the years 1994 and 1997. Eleven had increases in the number of tour groups, one decreased, and seven had very small, if any, changes.
- Twenty-three reported group tours for 1996 and 1997. Eleven increased, five decreased, and seven remained at the same level or had minimal change.

In addition, 22 of the plantations and other historical places said their business included "leisure motor coach tours" that did not include local schools, church groups, etc. Fourteen of the 22 provided figures on numbers of such group tours.

- The six that reported having this type of business in both 1988 and 1997 reported increases during the period.
- Eight of the ten that reported for the years 1994 and 1997 were also successful and experienced increases, while only one each reported a decline and no change in the volume of business.
- For the years of 1996 and 1997 the situation changed. Seven of the 14 reported increases, six experienced decreases, and one remained at the same level.

Alligator Bayou Tours
Courtesy Office of Tourism

b. Swamp Tours

Swamp tour operations have been in a distinct growth mode in the last decade. Previous Sea Grant research (*Louisiana Swamp Tours: A Survey, 1998*) indicated that in 1997 there were 44 operations statewide. Nearly 70 percent of the businesses had been in operation for less than 10 years. Twenty-seven swamp tours responded to this survey and it appears that these operations, by and large, continue to benefit from tourism's growth.

- Nine of the 27 reported visitors for 1988 and 1997. Five of them had increases during the period, two decreased, and two had a small or no change in volume.
- Fourteen reported visitor figures for 1994 and 1997. Eight experienced increases, four decreased, and two remained stable.
- Fourteen also reported for the years 1996 and 1997. Seven reported an increase in the number of visitors, while four had decreases, and three reported small or no changes in volume.

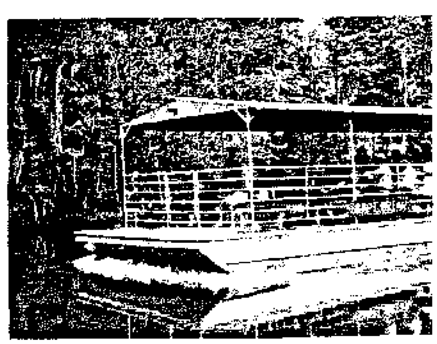
3. Perceptions of State Welcome Centers

Travel counselors at the state welcome centers are frequently the front line that greets out-of-state visitors. After the 1999 Louisiana Travel and Tourism Summit, and at the urging of the LAA and several state welcome center supervisors, a similar questionnaire was mailed to the 10 welcome centers and completed by supervisors and key staff members. Twenty-nine responses were received, and whereas most responses tracked with those expressed by the attractions, several differences were noted.

- Personnel at the state welcome centers are of the opinion (62 percent) that while Louisiana's casinos and/or riverboats have helped increase visitations, Mississippi's casinos have diverted visitors from the state's attractions (52 percent of respondents).

- Over 80 percent of the respondents (compared to 62 percent of the attractions) felt that advertising efforts had helped increase visitors to their particular region.

- They disagreed with the attractions' assessment that recent, negative news stories had not resulted in a decrease in the number of visitors. Seventy percent felt that visitations to their region had declined as a result of the negative publicity.



Torres Swamp Tour
Courtesy LTPA

●One-third of the state's welcome center personnel was of the opinion that more state funds need to be expended to attract international visitors. A similar amount had no opinion or disagreed.

●Over 90 percent of the respondents, felt that Louisiana:
-should be concerned about visitor volumes to our attractions, and
-initiate more coordination and cooperation between attractions and the welcome centers.

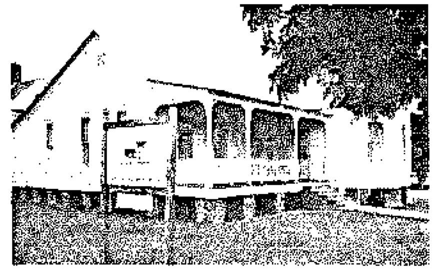
IV. GENERAL OBSERVATIONS AND CONCLUSIONS

At first glance, statewide, public and private attractions appear to be pleased with the overall growth trends experienced in the last decade or so, and are satisfied with the quality of the attractions and the experiences enjoyed by their visitors. This coupled with the continued good national and state economic news, plus special events such as FrancoFête and the preparations for the celebration of the 200th anniversary of the Louisiana Purchase in 2003, the opening of a new phase of the Ernest N. Morial Convention Center in New Orleans, improvements and expansions to meeting and convention facilities in other cities, and new attractions are cause for optimism among tourism leaders.

But this optimistic outlook is somewhat tempered by the concerns expressed by several but not all private attractions, notably plantations, museums and other historical places. These are valid concerns over recent (last two years) declines in attendance due to fewer motorcoach visits and/or fewer walk-ins. To reiterate, this sentiment is not widespread at this time, but careful attention needs to be given to this situation in the event that this marks the beginning of a larger trend that might affect the other attractions as well. This information could not be readily gleaned from the responses to the mailed questionnaire. Sea Grant and OT conducted 42 field interviews with selected attractions and CVBs/TCs. It is from this interview process that it was concluded that there was a decided undercurrent of apprehension and uncertainty about the future. It is safe to say that those interviewed during the field visit portion of this study expressed a much greater concern over the competitive forces that are affecting their operations than those that responded to the questionnaire. Most of those that completed and returned the questionnaire were satisfied that they were, in effect, competing successfully and growing.


Donaldsonville Museum

To illustrate this undercurrent, the following paraphrased comments were made by some of those interviewed between November 1998 and March 1999: "...group tour business is down...tour operators cannot sell Louisiana...casinos are diverting my tour business...public attractions are killing me...too many at the state advertising budget's trough...state advertising is not effective for cultural tourism...we do not work as a community of attractions...the Cajun craze is passé...plantations-been there, done that...we're worried about declines in the number of walk-ins...".


Arna Bontemps African-American Museum & Cultural Arts Center
Courtesy LTPA

Attractions and leaders in New Orleans, the state's main destination, also expressed some apprehension. They observed that New Orleans "...needs more national marketing...has become a big convention city, less of a family town, and consequently fewer visitors to smaller attractions...has so many attractions to see in so little time...has experienced a proliferation of house-museums."

Sea Grant concludes from the above information and observations that there are some early warning signs that Louisiana's tourism industry is entering a stage of maturity after 12-15 years of rapid expansion and development. Dr. Oakland's information confirms that in the late 1990s, the state is experiencing a slowdown in growth rates. There are several reasons for this, notably intense competition, but part of which can also be linked to changing demographic profiles and consumer preferences.

V. CHALLENGES FACING LOUISIANA'S ATTRACTIONS

Louisiana's attractions are confronted with several key external factors, most of which are linked, that will continue to affect their competitiveness: consumer preferences, product life cycles, competitive forces— both in and outside the state, and changing demographics.

A. Consumer Preferences and Product Life Cycles

The tourism marketplace is undeniably dynamic, and no attraction can escape this fact. Change is inexorable, and in this industry, the consumer rules. Tourists now expect and demand more because they have become experienced travelers. Their tastes, values, and interests are constantly changing, and they can discern quality. They will not be satisfied with second-rate attractions or services and demand authenticity. Authentic tourism experiences are those that are real-life undertakings versus those that are contrived, staged, or merely superficial. As a result, new tourism products, in our state and elsewhere, pose serious competition for older and dated tourism products. The tourism marketplace is truly a buyer's market, with many destinations and leisure options from which to choose. Increasingly the call is for quality and value for the price.

Since this is an extremely competitive business, changing circumstances can quickly erode an established market. Success can be influenced by the weather, changing consumer tastes, economic cycles, and/or governmental policies. The only constant is change. Successful attractions that become complacent and ignore customer demands and the external forces that are driving the market risk stagnation and an eventual downturn. Attractions need to carefully evaluate their product lines and either revitalize/refresh or reinvent them.

The product line evaluation requires ongoing research and planning about markets, customer attitudes and their preferences, and how these match with what the attraction has to offer. Figure 7 depicts the stages of an attraction's life cycle and provides brief descriptions of some of the key characteristics of each stage. Every product, tourism or otherwise, goes through such a life cycle: a period of growth, a peak of maturity, and an eventual decline. But the cycles are quite different in their speed of development and the total life expectancies (Wasson, 1983). The strategies to prolong, adapt, or change each of the stages results from an evolution of the visitors' perceptions and from the changing competitive market. There are some predictable patterns or cycles that attractions need to spot and use to determine the affect on their operations. These are relatively short and highly visible—seasonal changes, price competition, etc. Other patterns are much slower in developing and require more careful observation, introspection and research to detect. These cycles reveal that attractions, much like any other business, confront a competitive and open system, and they must face the prospect of changing circumstances.

Many of Louisiana's older and more established attractions are likely in the latter stages of the "competitive turbulence" phase, perhaps even "mature." Arguably, plantations and other cultural historical attractions as a whole are in the mature phase. Some relatively new entrants, i.e, nature-based attractions such as swamp tours, and attractions that have made improvements, introduced new services and products, and expanded markets might have succeeded and returned to the "rapid growth" phase. Still others, unable to make improvements and other necessary changes will have achieved the pinnacle of the cycle and are now in a decline mode.

B. External and Internal Competition

Competition for visitors is intense and will only intensify with time. The state's attractions confront growing, changing, and volatile markets. They face countless external as well as internal to Louisiana competitors.

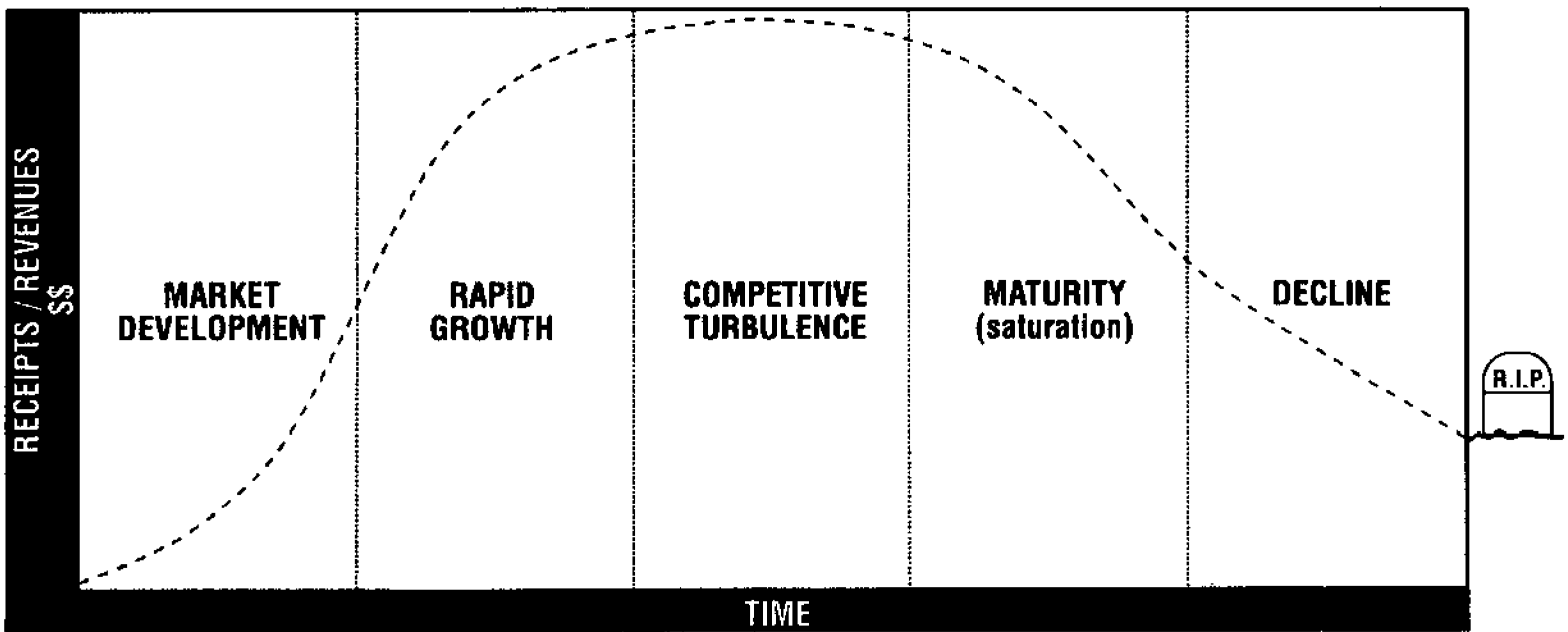
1. External Competition

External competitors include nearby states, international destinations, as well as other states for international visitors.

a. <u>Nearby States</u>

The nearby states of Mississippi, Texas, Florida, Arkansas and Alabama compete intensely with Louisiana for visitors. They, too, have over the last decade or so sensed the opportunity for

FIGURE 7. STAGES OF AN ATTRACTION'S PRODUCT LIFE CYCLE



	MARKET DEVELOPMENT	RAPID GROWTH	COMPETITIVE TURBULENCE	MATURITY (saturation)	DECLINE
OBJECTIVE	Build awareness fast	Establish niche in marketplace	Maintain niche and loyalties	Defend through constant alert and fresh promotion	Cut your losses
OUTLOOK FOR COMPETITION	Few until successful	Aggressive emulators	Shaking out of the weak	Stable, few entrants	Disappearing as demand drops
PRICING	Competitive, cost-recovery plus	Discounts Promotional pricing	Market expansion and promotion pricing	Defensive	Barely profitable
PROMOTION	Heavy publicity and mass advertising	Heavy use of mass media, promotions	Heavy mass media and promotions	Mass media and promotions	Minimize
RESEARCH & INTELLIGENCE	Identify market segments	Detailed attention to position in marketplace, market coverage, and market segments	Possible improvement, new products, market broadening, new promotional approaches	Intensified attention to improvement needs, alert for inter-product competition, hints of market decline	Look for more profitable uses for resources involved

SOURCE: Louisiana Sea Grant College Program, 1999. *Adapted from Chester R. Wasson, Marketing Management: The Strategy, Tactics & Art of Competition, 1983.

growth and made some major investments in their promotional budgets. On a percentage basis, some have exceeded Louisiana's rate of change. This information appears in Table 1 below.

Table 1. Selected Domestic Travel Advertising Budgets for Fiscal Years 1990-91 and 1998-99

State	1990-91 (Millions of dollars)	1998-99 (projected) (Millions of dollars)	Percent Change
LA	$4.5	$6.3	40
AL	1.3	N.A.	N.A.
MS	0.3	2.3	666
AR	3.4	5.7	68
TX	5.4	11.0	137
FL	3.8	9.6	153

Source: Travel Industry Association, 1999.

Interviewees were more concerned than survey respondents over tourism's rapid growth in Mississippi. That state's competition is indeed formidable, particularly the Gulf Coast area where resort communities in serious disrepair and decline were converted into boom areas after dockside-gambling was introduced in 1992. In 1997, Mississippi's Gulf Coast gaming revenues exceeded $750 million (U.S. Banker, 1998), and the May 1998 issue of the trade publication, *Casino Journal*, projects that the Gulf Coast market could grow to $1.1 billion by 2002, thanks to several new and/or expanded projects. Longwoods International estimates that the Mississippi Gulf Coast hotels and casinos have over 19 million visitors per year that generate expenditures of $2.8 billion. The area's goal is to move from a regional gambling market to a national vacation resort destination, and the second most important gambling destination in the country (*The Sun Herald*, March 15, 1998). As with any other quality tourism product that is properly marketed, newer attractions such as these are more appealing, if for no other reason than the novelty.

To meet this challenge, New Orleans and Plantation Country attractions, in particular, need to remain on guard and constantly review their marketing strategies and plans, and perhaps include more collaborative efforts among themselves and with Mississippi properties. Whereas the annual number of visitors to New Orleans has grown steadily in the last four years and visitor expenditures in the metro area have exceeded $4.0 billion per year, there are indications that some city attractions—notably cultural and historic attractions— are suffering as a result of this competition and New Orleans' focus on convention business. Although no statistics are readily available, interviews with other area CVBs/TCs and selected Mississippi properties indicate that they are receiving visitors, primarily family and other leisure travelers, that heretofore would have stayed in New Orleans. These visitors are attracted to these outlying locations by more economical accommodations. Increased visitors to such outlying areas like Tangipahoa, Jefferson, and St. Tammany parishes may acquire hospitality business and increase the number of day trippers to

New Orleans. However, the result might be detrimental to both areas over the long term. Many of the more time-consumptive New Orleans venues will experience a reduction in visitors who must travel before they sleep and, as the resulting strength of the state's major venue decreases, the total number of visitors to the state may be reduced. Unfortunately, what might be good news for in-state accommodations in Tangipahoa, Jefferson, and St. Tammany parishes is likely resulting in more day trips to New Orleans, thus reducing the amount of time to see and do in that city, which in turn affects visitations at many New Orleans attractions. It is possible, however, that attractions in outlying areas could be benefitting.

From all indications, Florida's tourism forecast is also very bright. "Visit Florida" is aggressively promoting the state, and the forecasts are for steady increases in visitation and revenues. New attractions continue to open. Walt Disney World's (WDW) fourth theme park, "Disney's Animal Kingdom", opened in April 1998. WDW has also added two cruise ships and a private island to its product line. "Disney's Test Track" also opened in 1998. Universal Studios is in the midst of a multi-billion dollar expansion that includes hotels, a new theme park and a retail complex. Other major Florida attractions making changes or adding to their attractions base include Busch Gardens, Cypress Gardens, and the Kennedy Space Center Visitors Complex (Amusement Business, February 23, 1998).

The Texas Department of Economic Development, Division Of Tourism reports that in 1997 the volume of travel to Texas increased by eight percent. This growth was driven primarily by a 12 percent increase in non-Texan travel. Texas had the second highest (behind California) volume of visitors in the nation. The Nielsen designated market areas (DMAs) with the highest relative contribution to Texas were Oklahoma City and two Louisiana cities, Lake Charles and Lafayette. Other DMAs with high indices included Wichita, Kansas and Monroe-El Dorado.

New attractions are being planned and built throughout that state, particularly close to the metropolitan areas that have traditionally helped supply Louisiana with about a fourth of its out-of-state visitors. The Dallas-Forth Worth area, Houston/Galveston, San Antonio and Corpus Christi/Padre Island have inaugurated or have plans for major improvements at older attractions or the opening of new ones. In downtown Houston, for instance, the Harris County Houston Sports Authority is building a new stadium scheduled to open in April 2000. The Astrodome complex will remain. If Texas were to legalize casino gambling or allow for the introduction of Indian reservation casinos, much of the visitor spending at Louisiana's casinos could be eliminated (Louisiana Gaming Control Board, 1999).

b. International Destinations

In 1997, the US Department of Commerce reported that 21.6 million U.S. residents flew to overseas destinations. The real cost of travel has decreased over the years, and what once was seen as travel to distant and exotic destinations throughout the world is being made much more accessible by the stability of the U.S. dollar, special fares, packages, and incentive plans. For instance, it is remarkably economical to travel to Mexico during our summer months, and likewise very inexpensive to visit Europe in the winter. Travelers that heretofore could only afford to get in the car and drive a few hundred miles to a vacation spot can now afford to travel to Europe, Canada, and the Caribbean. Much of this is being driven by competitive pricing by airlines, cruise lines, hotels, and resorts.

Cruise lines, in particular, have experienced a remarkable worldwide growth and there are indications that this growth will steadily continue. TIA reports that the number of cruise passengers grew from 5.1 million passengers in 1997 to 5.4 million in 1998. In addition, 75 million Americans have expressed a strong desire to take a cruise in the next five years, and over $10 billion have been committed to building over 30 new ships by 2004.

A strong national economy and favorable exchange rates also have a lot to do with increased travel to certain international destinations. Considering the dire situation of the Canadian dollar and several Asian currencies vis-à-vis our dollar, it is not surprising that U.S. travel to these destinations has grown. The U.S. Department of Commerce reported that resident travel to Canada grew by more than eight percent in the first ten months of 1998 when compared to the same period in 1997. That represents approximately 70,000 more U.S. travelers to that country for the period. The American dollar was at a record high of CDN $1.54 compared to CDN $1.39 for the same month in 1997. In addition, in 1998 the U.S. dollar bought 33 percent more in Canada than it did in 1990. As a result, Canadian tourism leaders are focusing marketing strategies on attracting more U.S. residents. They want to continue expanding that market at an annual rate of four percent. Similar efforts are being directed at Europeans and Japanese (U.S. Department of Commerce, Tourism Industries Office, 1999).

A great deal of speculation is taking place about what will occur in Southern U.S. and Caribbean attractions once relations with Cuba are normalized. The precise international destinations often mirror the mood or concerns of the country. If prospective travelers are, for instance, worried about political instability and safety issues at some distant destinations, they become more cautious and stay closer to home or visit Canadian and European locations where they feel safer. Otherwise, travelers are more likely to experiment with destinations in the Orient, Africa, Latin America and eastern Europe.

c. Inbound International Visitors

Louisiana competes with 49 other states and international destinations for international travelers. International tourists spent $452 million in 1997 in Louisiana (USTDC, 1998), and this has become an important factor in the strength of the state's tourism industry. Between 1997 and 1998, Louisiana ranked fourth in the nation in growth (11 percent) of overseas visitors and was one of only 10 states experiencing growth. The others experienced declines. Some 400,000 international visitors, excluding those from Canada and Mexico, visited the state. Economic and political developments in other countries are likely to affect the volume of inbound overseas travel, and in some instances this could have negative implications for Louisiana's share and volume of international visitors. An example is the aforementioned Canadian situation with the relative weakness of that country's dollar and also Brazil, where Louisiana has been targeting marketing efforts but where the economic outlook remains quite unstable.

2. Internal Competition

Louisiana has more attractions today than it ever had in the past! Approximately one-third of the responding attractions (51) began operations after 1990. An additional 40 opened their doors during the 1980s. More attractions have opened or announced opening dates since this survey was completed in early 1999, particularly in the New Orleans area. Examples include the Audubon Institute's Insectarium, Harrah's Casino on Canal Street, the Jazzland Theme Park in eastern New Orleans, the National D-Day Museum, the new basketball and hockey arena next to the Superdome, additions to Bayou Segnette and other areas state parks, live music venues in the New Orleans central business district, more historical houses opening for tours, and the USWFS Bayou Sauvage National Wildlife Refuge. A New Orleans Jazz Historical Park is being planned by the National Parks Service. In addition, facilities are planned for the Cane River Creole National Historical Park and Heritage Area in Natchitoches.


Popular Grove Plantation
Courtesy LTPA

This points to a dilution effect. Statistics indicate that Louisiana's tourism "pie" has grown substantially in the last decade. Tourist visitations grew rapidly from over 16 million in 1988 to nearly 26 million in 1997, an increase of over 55 percent. Louisiana's share of national and regional travel also increased, and travel related expenditures have grown accordingly. This growth created new private and public development opportunities, i.e, attractions, which in turn have come to share in the growing tourism pie, which has meant smaller slices for many! Those particularly affected have been cultural and historic attractions, notably plantations and historic homes. Visitor numbers and revenues appear to be down, and there is some well-founded concern.

Many private attractions have also expressed concern over the establishment of and possible competition from public attractions. The most popular public ones are the seven centers of the Jean Lafitte National Historical Park and Preserve (JLNHPP), the 17 state parks and 15 commemorative areas, the U.S. Fish and Wildlife Service's National Wildlife Refuges, and the U.S. Forest Service's Kisatchie National Forest. In addition, many local attractions, such as parks, local museums, and historic attractions charge little, if any, for admission. In several instances this has created a situation that regrettably pits public versus private attractions.

3. Other Leisure Options

The American consumer is, at best, a harried leisure class. In the 1970s and 1980s, the prevailing sentiment was that our rising affluence, smaller family size, technological changes, and increased life span would enable consumers to take longer leisure periods. Not so. Americans, particularly women, are starved for leisure time. Longer working hours, stressful working conditions, more women in the work force, and little time for families translate into shorter, getaway-type trips. Short burst, high intensity activities are the norm and necessity for the leading edge of the baby-boomers.

Thus, traditional forms of tourism, such as attractions, also face stiff competition for the disposable dollar from other leisure products—recreation and other forms of entertainment, such as movies, sporting events, and gaming. Activities such as shopping that were once considered a part of non-leisure time are being converted into a leisure experience. Evidence of this is the popularity of the ultra-modern, all-inclusive casinos in Las Vegas and outlet malls throughout the country. Even major airports have shopping complexes. Also consider how much time today's traveler devotes to getting prepared to take trips...planning, reading, researching. Americans are making the entire the trip process into a leisure activity.

Vermilionville
Courtesy Office of Tourism

C. Changing Demographics

The above discussion regarding other forms of leisure that compete with attractions for the tourist's attention and money point to important demographic changes during the 1990s and early next century. These impending changes are likely to affect the demand for certain product lines most of which are in a period of transition between being in demand by earlier clientele and less demand by the leading edge of the baby boom generation.

The Canadian Tourism Research Institute (CTRI) released a report in 1997 entitled *Travel Forecast 2000*, in which over 30 senior executives in the North American tourism industry were interviewed for their perspectives on leisure travel in the first part of the 21st century. In particular, they focused on changing demographics and travel expectations. The executives noted that the tourist in the year 2000 will be a much more experienced traveler, more adventurous than earlier ones, and will expect more out of their vacations than past generations. Baby boomers seek not only "active relaxation" and entertainment when they travel, they also want to learn new things.

And because there are so many, they will be pampered by providers. By the year 2016, "empty-nesters" who are mortgage and kid-free will make up almost a third of family households. In addition, over the next 20 years or so, baby boomers stand to inherit as much as a trillion dollars from the previous generation. They will be looking for ways to spend the money, and most assuredly tourism markets will be deluging them with new products and services.

The adventurous, educational, hassle-free, and activity oriented expectations of baby boomers thus do not bode well for those attractions whose product lines can be labeled as "been there, done that." Tour companies are anxious to design new, more unusual trips that have a distinct learning or interpretation element. Many attractions expressed a concern over the future of motor coach tours. "Tour operators are having a difficult time selling Louisiana to their customers" was a statement heard frequently during the course of this study. Sea Grant attempted to contact several of the main operators in the state to obtain their impressions, but was not very successful. It is safe, however, to say that if indeed selling Louisiana destinations has become difficult, many of the reasons are stated above.

The motor coach industry is repositioning itself in a changing marketplace. This industry is also facing considerable competition and consolidation, and is feeling the effects of changing demographics. The new seniors—leading edge of baby boomers—have needs and desires that are different from traditional tour clientele. Baby boomers have a greater interest in individual versus escorted tours. They are also looking for greater variety, new attractions, and new itineraries, in other words, an "organized independence" much like cruise ships and all-inclusive resorts.

One of the outcomes of this changing situation is that in Louisiana and other states where gaming is a significant activity, motor coaches have become heavily involved in transporting guests to and from casinos. Motor coaches are also making shorter trips, have revised some of their itineraries, are using fewer buses for these routes with less passengers, and are visiting cheaper and often free attractions in order to reduce costs. Understandably, the Louisiana attractions that relied heavily on this type business have a renewed interest in the walk-in business.

Cultural and natural heritage tourism will continue to grow even more during the early part of the next century because travelers are becoming more interested in being closer to the environment and learning about local peoples and their cultures. In addition to adventurous travel, there are some low risk types of travel that are also expected to do quite well among the well traveled baby boomers: cruises and all-inclusive resorts. Gaming is also likely to become more popular as this generation ages and phases out of active travel.

VI. RESPONSE STRATEGIES

A. Response Strategy #1: Attractions to Revisit Their Product Line

Louisiana's attractions have the daunting challenge of having to survive and thrive in an extremely competitive and dynamic marketplace, particularly when many of their offerings are at or near the mature phase of the product cycle. In order to do this, they must first become extremely introspective and realistic, and conduct an objective assessment of their product lines. Each attraction, for each of their tourism products, should (1) determine what particular stage the product is in; (2) where they would place the attraction in the overall cycle, and (3) what they are doing to introduce new products into the first stage, market development, of the cycle.

Initially, the attraction might consider viewing the product line or activities/services it has to offer as a portfolio. A portfolio that would have four distinct groups:

- STARS - high market share, high growth. Maximum attention. The winners.
- BLACK HOLES - opposite of stars. Candidates for elimination.
- SPACE STATION - high market share, low growth. "Be prepared to abandon..."
- PLANETS - Low share, although great opportunity. Either convert them to Stars or send them to the Black Holes!

The attractions must not only recognize their position in the market place, but must also remain up to date and ever vigilant. They need to be visitor-oriented, not product-oriented. Determine, in advance, what she wants to see and do, not what the attraction has to sell. Develop new, quality, and authentic products through cautious, well-planned pilot projects, where the visitor gets added value. After doing the research and planning, devise marketing strategies and "pound the pavement." Don't leave it up to others or you'll be doomed. Be patient and stay the course; it will take 3-5 years to reap the full benefits.

Older attractions that countered competition by refreshing their product mix and devising different marketing strategies have, to a large extent, been successful. Several keys to survival and turnaround were cited. Most noted they had begun pursuing more local and regional markets by expanding the array of services and activities offered while not compromising their quality or authenticity. Examples of additional services and activities, include serving lunches and candlelight dinners, opening or expanding bed and breakfast operations, staging after-hours functions for corporate clientele, more school programs, organizing plant sales and gardening workshops, conducting cooking and textile classes, inviting famous national speakers and performers, marketing as a site for corporate retreats, and organizing festivals and other special events. They also stabilized prices to reflect market conditions and appeal to these new markets.

B. Response Strategy #2: Attractions to Revisit Their Marketing Strategies

Marketing is much more than selling, and promotion should only take a fraction of the marketing resources that are actually expended. Marketing involves ongoing research and planning about new and target markets, customer attitudes, and preferences. All are needed in order to provide new products and remain "fresh" and competitive. Attractions should examine their counterparts from several angles instead of identifying them only as regional or local rivals. In fact, considerable effort should be devoted to cooperating more closely with like-attractions. The biggest potential rivals are beyond the immediate area, and it is imperative that marketing resources be dedicated to better understanding the broader competitive arena and learning more about future directions and actions.

Public and private attractions should redouble efforts for collaboration at state, regional, and local levels. OSP has taken the lead in forging better public-private partnerships, evidence of which are their new state parks brochures where nearby private attractions are listed. Since public funding for marketing is an issue, public attractions should explore establishing or tapping "Friends" groups for cooperative promotional purposes with the private sector.

Lake Fausse Pointe
Courtesy LTPA

Some attractions still subscribe to the notion that tourism marketing is the purview of the state or CVB/TC. Do not leave it up to others. Each of these entities has a distinct marketing responsibility. The state is charged with attracting visitors to Louisiana; the CVBs/TCs try to lure those visitors to their cities, towns, and parishes, and the attractions see to it that the visitors to those communities walk through their doors and gates.

Tourism marketing efforts by the state through the Office of Tourism, by the convention and visitor bureaus and tourist commissions, and by individual attractions have been successful. Advertising and other marketing expenditure statistics are not available for CVBs and attractions, but are reported by the state. Tourism marketing became a major state priority in 1990 when Louisiana dedicated .03 percent of its sales tax collections to the Office of Tourism via the Louisiana Promotion District for the purposes of promoting tourism opportunities in the state. The appropriation was capped at $12 million in 1993, then raised to $15 million in 1996 and eventually to $16 million in 1998. Efforts are underway to remove the cap which, according to the LTPA, would generate an additional three million dollars for the year 1999-2000.

On average, slightly over 50 percent of the appropriation is used to fulfill the mission of the Office of Tourism, and the balance is used to fund the state's advertising contract. As can be noted in Table 2, despite declines in the state's advertising budgets in the mid 1990s and an increase beginning in 1996, the advertising budget still remains 16 percent below the $7.5 million amount achieved in 1991-92. Total domestic advertising by the Office of Tourism alone exceeded $51 million dollars in the last nine years.

Table 2. Domestic Tourism Advertising Budgets for Louisiana, 1990-99

YEAR	AMOUNT (Millions of dollars)	% Growth/Decline
1990-91	$4.5	--
1991-92	7.5	+67
1992-93	5.7	-24
1993-94	5.3	-7
1994-95	5.2	-2
1995-96	5.0	-4
1996-97	5.9	+18
1997-98	6.0	+2
1998-99	6.3	+5
Total	$51.4	

Source: Office of Tourism, 1999.

C. Response Strategy #3: More Regional Activism in Marketing

The majority of smaller attractions have minimal marketing budgets. Most cannot afford to market effectively by themselves and rely heavily on larger partners and marketing cooperative organizations such as the LTPA to help stretch their resources. But additional activism is needed. Marketing alliances can be established under the auspices of CVBs and TCs, and perhaps regional chapters of the LAA should be established. Whereas it would be desirable to have as many attractions as possible belong to a particular marketing alliance, this is by no means a prerequisite for getting started and becoming active. Several efforts have succeeded, others have failed. According to a report, 60 percent of strategic alliances fail (Leisure Industry Report, 1996). Leadership is usually the key ingredient and many like-minded attractions would be well served to explore joint ventures to create a more coordinated and appealing product. If any lessons have emerged in our state from the last decade or so, they should be that of "quality, authenticity, flexibility, and coordination."

The Baton Rouge CVB, for instance, has recently taken the lead in promoting the plantations located along the Mississippi River between Natchez and New Orleans, and the Shreveport-Bossier CVB assists the attractions in that area. A five-member marketing alliance in Iberia Parish pooled its resources, leased a billboard and has worked out a joint ticketing program. Other efforts involve ad hoc groups or attractions agreeing to publish brochures and other informational materials. Examples include the work done earlier in the 1990s by the Plantation Parade in the River parishes and plantations in central Louisiana. Still other attractions groups, such as the New Orleans museums and historical places, meet informally on a monthly basis to bring each other up to date and explore collaborative opportunities.

D. Response Strategy #4: Attractions Need More Vigilance and Research Information

The marketplace is ever-changing and most attractions lack the necessary staff and budgets to remain abreast. Yet, they need the information. Over the years the LTPA and the Research Division of the OT have attempted to fill this gap through publications, newsletters, bulletins, conferences, seminars, and workshops. But more is needed, particularly when one considers the dynamics of the tourism marketplace. There are constant changes in the identity of visitors, their tastes, values, and interests. There are changes also in the kinds, types, and levels of competition; changes in the consumer culture, and of course, issues such as the political and economic realities that are in constant flux.

Modern technology can be of great assistance to attractions, not only in marketing and promoting via the Internet, but also by identifying web sites that can serve as resources to help remain abreast of breaking developments and trend information. For instance, Sea Grant found the aforementioned report by the Canadian Tourism Research Institute on changing demographics (www2.conferenceboard.ca/ctri) by typing in the key words "North American travel and trends" into a search engine.

Additional training programs sponsored by the LTPA, LAA and OT would also be of great help, but require that attractions attend and contribute to the discussions. Most would find the more sophisticated aspects of attractions' marketing to be most helpful. Besides the ABCs, they would find the DEFs, along with more speakers and panels at the annual summit on trends, consumer preferences, new strategies, what works, what does not, etc. There is also a need for on-going dialogue between the front-line travel counselors and the attractions. This would help bridge the coordination gap between attractions and the state's efforts that were noted in the survey. The Office of Tourism should increase its research efforts and redouble its attractions' outreach efforts.

There is a need for visionary thinking in the state on tourism-related matters. The industry is facing growing competition from multiple fronts, and some of our attractions—particularly the historic and cultural ones—are sounding early warning signals that tough times are ahead. This is happening while the industry continues to do well. Based on our research as well as informal contacts Sea Grant suggests that more research and advanced planning are needed for the tourism sector. Unfortunately, tourism planning, not just in our state, has been limited to budget cycles or fiscal years. Furthermore, much the of the planning is driven by tactical concerns, such as what to do with promotional campaigns and advertising budgets. There has not been any significant strategic thinking and planning for the next 15-20 years. Tourism in the state, and unfortunately by the nature of the business, has been responding to what's hot and what's not.

Louisiana needs to establish a university-based mechanism that will allow the trade to gaze into a crystal ball and peer down on changing demographics and consumer profiles, information and travel technology, changing travel patterns, global markets, influences, etc. Consider, for instance, that between 1996 and 2010 there will be a 68 percent change in the number of Americans in the 55-64 age group. Today, approximately 40 million make up that age cohort. By 2010 there will be roughly 75 million. This will have major implications to tourism as it is defined today.

One of the charges for this university-based mechanism would be to scan for information and study numbers—lots of numbers. Insights into trends and the effects the trends will have on the numbers will provide a base for informed, strategic planning as well as a mechanism that is conducive to "thinking outside the traditional tourism box" of what's hot, what's not. A mechanism that in the words of a Xerox executive will help us "...predict the future by inventing it". This mechanism should help us provide for a future where we don't just respond to trends, but rather work at molding them or even establishing them! It should help us broaden the debate over strategies to achieve a truly sustainable sector for years to come.

Sea Grant proposes to take the lead by convening a forum of Louisiana tourism leaders to determine if they share these views. If so, this topic might be the theme of a major conference with presenters and debaters addressing questions and possible answers about travel, Louisiana, and the 21st century.

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APPENDIX I

QUESTIONNAIRES

LOUISIANA STATE UNIVERSITY
and Agricultural and Mechanical College
Louisiana Sea Grant College Program
Office of Sea Grant Development

Louisiana Attractions Survey

Dear Louisiana Attraction:

The Louisiana Sea Grant College Program at LSU is conducting a survey of our state's attractions to obtain information concerning visitors, changes, trends and other factors that may be affecting your attractions. The information that you are being asked to provide below will remain strictly confidential! Your input is very important to the success of the project, and we appreciate your taking the time to complete and return this questionnaire. A copy of the final report will be mailed to you in the spring of 1999.

1. Name of Attraction ______________________________

2. Contact Person ______________________

   Title ______________________

3. Address ______________________

   ____

4. Phone: ______________ Fax: ______________

   E-mail: ______________________

5. What year did this attraction open? ________ (year)

6. Which of the following best describes the ownership/management situation of this attraction?

   ____a. Publicly owned and managed by a parish, city, or other governmental agency.

   ____b. Privately owned and managed.

   ____c. Publicly owned and managed by a private corporation or business.

   ____d. Privately owned and managed by a parish, city, or other governmental agency.

   ____e. Other (please explain) ______________________.

7. If you checked **b.** or **c.** in the above question, when did the present owner/corporation begin operating this facility? ________ (year)

8. Is this facility open all year?

   ____No

   ____Yes

9. Estimate the seasonal percentage of your attendance in 1997 and WHEN YOU FIRST OPENED/or TEN YEARS AGO.

Season	**1997 (percent)**	**When First Opened or 1988 (percent)**
Spring		
Summer		
Fall		
Winter		
Total	**100%**	**100%**

10. If you have experienced either positive or negative changes in your seasonal attendance volume since you first opened, what would you attribute this to? (Choose all that apply.)

____a. different marketing strategies
____b. more advertising
____c. improvements made to my facility/site
____d. changes in the time (hours/days) my facility is open
____e. opening or closing facility
____f. weather-related occurrences
____g. renovation or construction
____h. local resident population growth/trends
____i. out-of-state visitor trends
____j. competition from other attractions
____k. other (please elaborate)

____
____
____

11. In the table below please provide the annual number of visitors to your attraction. If the attraction opened after 1988, please indicate the annual amount beginning with the year you opened.

Year	**Number of Visitors**
1988	
1989	
1990	
1991	
1992	
1993	
1994	
1995	
1996	
1997	

12. In the table below, please provide us with the annual **number of group tours** to your attraction.

Year	Number of Group Tours
1988	
1989	
1990	
1991	
1992	
1993	
1994	
1995	
1996	
1997	

13. Which of the following best describes where your current **group tour** business comes from? (Check all that apply.)

____a. delegate and/or spouses from conventions, meetings, etc.

____b. international visitors

____c. leisure motorcoach tours that do not fit the above criteria

____d. other (please specify) ______________________________

14. Louisianians represent what percentage of your 1997 annual attendance? _______%

15. In 1997, what were the top three states **(excluding Louisiana)** of origin for your U.S. visitors?

(a)____________________(b)____________________(c)____________________

16. In 1997, what were the top three countries of origin for your international visitors?

(a)____________________(b)____________________(c)____________________

17. Over the years, have you observed major changes in the mix of Louisiana, other U.S., and international visitors to your attraction? _______No _______Yes

If **yes**, please check those that apply:

a. Louisiana visitors.............more_____ less_____

b. Other U.S. visitors...........more_____ less_____

c. International visitors..........more_____ less_____

18. Please circle the number that best applies to **your personal opinion** of whether the following trends or events have affected visitation patterns to your attraction?

	Strongly Agree	Moderately Agree	No Opinion	Moderately Disagree	Strongly Disagree
(a) Louisiana's parks, museums and attractions have helped increase visitation to my site.	1	2	3	4	5
(b) Gaming facilities in Mississippi are diverting potential customers from my site.	1	2	3	4	5
(c) The State's out-of-state advertising efforts have increased the number of visitors to my attraction.	1	2	3	4	5
(d) National economic conditions have a lot to do with how many visitors I have during any given year.	1	2	3	4	5
(e) The Office of Tourism is doing enough to attract international visitors to Louisiana.	1	2	3	4	5
(f) I am satisfied with the quality of my attraction. It is clean, accessible, appealing, educational, fun, etc.	1	2	3	4	5
(g) My attraction has felt the impact of Louisiana's recent economic rebound.	1	2	3	4	5
(h) My attraction is in great shape, and I have spent a great deal of money and time on it. I only need help in promoting my attraction to get more visitors.	1	2	3	4	5
(i) There are quite a few attractions like mine in the general vicinity. This is not helping my operation.	1	2	3	4	5
(j) Recent news stories that gave Louisiana a negative image (crime and safety, *Dateline*, etc.) caused a decrease in visitations to my attraction.	1	2	3	4	5
(k) More state funds need to be expended to attract international visitors.	1	2	3	4	5
(l) I am not concerned about the current visitor volume to my attraction.	1	2	3	4	5

	Strongly Agree	Moderately Agree	No Opinion	Moderately Disagree	Strongly Disagree
(m) Changes are needed in the State's advertising to improve my attraction's attendance.	1	2	3	4	5
(n) I do not believe that tourism growth in Louisiana has been as strong as has been publicized.	1	2	3	4	5
(o) If the current visitor volume to my attraction does not change, I will be happy.	1	2	3	4	5
(p) The number of visitors to my attraction must grow in order to keep my attraction open.	1	2	3	4	5
(q) I am interested in improving my attraction's appeal to gain more visitors.	1	2	3	4	5
(r) There needs to be more coordination and cooperation between attractions like mine and Louisiana's tourism promotion efforts.	1	2	3	4	5
(s) Gaming facilities increase the number of visitors to Louisiana.	1	2	3	4	5

19. Please check the top **five** business management problems being experienced by your attraction.

___Insurance
___Litter
___Lack of funding for promotion/advertising
___Extensive Paperwork
___Inability to hire and/or retain employees
___Ability to secure good business financing
___Seasonality of Business
___Crime
___Other (Specify)
____

20. What type(s) of advertising do you currently use to promote your business? (Check all that apply.)

___a. Louisiana Tour Guide
___b. Newspapers
___c. Magazines
___d. Television
___e. Radio
___f. Yellow Pages
___g. Internet
___h. Signs/billboards
___i. Brochures
___j. Direct Mail
___k. Trade Shows
___l. LTPA (Louisiana Travel Promotion Association)
___m. LAA (Louisiana Attractions Association)
___n. Other (Specify)______________________

21. Do you do any cooperative marketing?

No____

Yes____

If **yes**, with whom?________________________________

____

22. What are the top three things visitors tell you that they **enjoy** about your attraction?

1) ________________________________

2) ________________________________

3) ________________________________

23. What are the top three things visitors tell you that they **do not like** about your attraction?

1) ________________________________

2) ________________________________

3) ________________________________

24. What are the top three things visitors tell you that they **enjoy** about Louisiana?

1) ________________________________

2) ________________________________

3) ________________________________

25. What are the top three things visitors tell you that they **do not like** about Louisiana?

1) ________________________________

2) ________________________________

3) ________________________________

26. What, if anything, do you think your attraction could do to improve attendance?

____

____

____

____

____

27. In what area(s) or on what topic(s) do you feel that you could use more information and/or training?

____

____

____

Please return the completed questionnaire in the enclosed self-addressed stamped envelope by NOVEMBER 9, 1998.

LOUISIANA STATE UNIVERSITY
and Agricultural and Mechanical College
Louisiana Sea Grant College Program
Office of Sea Grant Development

Louisiana Attractions Survey

Dear Louisiana Attraction:

The Louisiana Sea Grant College Program at LSU is conducting a survey of our state's attractions to obtain information concerning visitors, changes, trends and other factors that may be affecting your attractions. The information that you are being asked to provide below will remain strictly confidential! Your input is very important to the success of the project, and we appreciate your taking the time to complete and return this questionnaire. A copy of the final report will be mailed to you in the spring of 1999.

1. Name of Attraction ______________________________

2. Contact Person ______________________

   Title ______________________

3. Address ______________________

   ____

4. Phone: ______________ Fax: ______________

   E-mail: ______________________

5. What year did this attraction open? ________ (year)

6. Which of the following best describes the ownership/management situation of this attraction?

   ____a. Publicly owned and managed by a parish, city, or other governmental agency.

   ____b. Privately owned and managed.

   ____c. Publicly owned and managed by a private corporation or business.

   ____d. Privately owned and managed by a parish, city, or other governmental agency.

   ____e. Other (please explain) ______________________.

7. If you checked **b.** or **c.** in the above question, when did the present owner/corporation begin operating this facility? ________ (year)

8. How many staff members do you have?

   ____full time

   ____part time

9. Is this facility open all year?

   ____No

   ____Yes

10. Estimate the seasonal percentage of your attendance in 1997 and WHEN YOU FIRST OPENED/or TEN YEARS AGO.

Season	**1997 (percent)**	**When First Opened or 1988 (percent)**
Spring		
Summer		
Fall		
Winter		
Total	**100%**	**100%**

11. If you have experienced either positive or negative changes in your seasonal attendance volume since you first opened, what would you attribute this to? (Choose all that apply.)

____a. different marketing strategies
____b. more advertising
____c. improvements made to my facility/site
____d. changes in the time (hours/days) my facility is open
____e. opening or closing facility
____f. weather-related occurrences
____g. renovation or construction
____h. local resident population growth/trends
____i. out-of-state visitor trends
____j. competition from other attractions
____k. other (please elaborate)

____
____
____

12. In the table below please provide the annual number of visitors to your attraction. If the attraction opened after 1988, please indicate the annual amount beginning with the year you opened.

Year	**Number of Visitors**
1988	
1989	
1990	
1991	
1992	
1993	
1994	
1995	
1996	
1997	

13. In the table below, please provide us with the annual **number of group tours** to your attraction.

Year	Number of Group Tours
1988	
1989	
1990	
1991	
1992	
1993	
1994	
1995	
1996	
1997	

14. Which of the following best describes where your current **group tour** business comes from? (Check all that apply.)

____a. local schools

____b. church groups

____c. delegate and/or spouses from conventions, meetings, etc.

____d. international visitors

____e. riverboat passengers

____f. leisure motorcoach tours that do not fit the above criteria

____g. other (please specify) ______________________________

15. Louisianians represent what percentage of your 1997 annual attendance? _______%

16. In 1997, what were the top three states (**excluding Louisiana**) of origin for your U.S. visitors?

(a)____________________(b)____________________(c)____________________

17. In 1997, what were the top three countries of origin for your international visitors?

(a)____________________(b)____________________(c)____________________

18. Over the years, have you observed major changes in the mix of Louisiana, other U.S., and international visitors to your attraction? _______No _______Yes

If **yes**, please check those that apply:

a. Louisiana visitors.............more_____ less_____

b. Other U.S. visitors...........more_____ less_____

c. International visitors.........more_____ less_____

19. Please circle the number that best applies to **your personal opinion** of whether the following trends or events have affected visitation patterns to your attraction?

	Strongly Agree	Moderately Agree	No Opinion	Moderately Disagree	Strongly Disagree
(a) Casinos and/or riverboats in Louisiana have helped increase visitation to my attraction.	1	2	3	4	5
(b) Casinos in Mississippi have diverted visitors away from my attraction.	1	2	3	4	5
(c) The State's out-of-state advertising efforts have increased the number of visitors to my attraction.	1	2	3	4	5
(d) National economic conditions have a lot to do with how many visitors I have during any given year.	1	2	3	4	5
(e) The Office of Tourism is doing enough to attract international visitors to Louisiana.	1	2	3	4	5
(f) I am satisfied with the quality of my attraction. It is clean, accessible, appealing, educational, fun, etc.	1	2	3	4	5
(g) My attraction has felt the impact of Louisiana's recent economic rebound.	1	2	3	4	5
(h) My attraction is in great shape, and I have spent a great deal of money and time on it. I only need help in promoting my attraction to get more visitors.	1	2	3	4	5
(i) There are quite a few attractions like mine in the general vicinity. This is not helping my operation.	1	2	3	4	5
(j) Recent news stories that gave Louisiana a negative image (crime and safety, *Dateline*, etc.) caused a decrease in visitations to my attraction.	1	2	3	4	5
(k) More state funds need to be expended to attract international visitors.	1	2	3	4	5
(l) I am not concerned about the current visitor volume to my attraction.	1	2	3	4	5

	Strongly Agree	Moderately Agree	No Opinion	Moderately Disagree	Strongly Disagree
(m) Changes are needed in the State's advertising to improve my attraction's attendance.	1	2	3	4	5
(n) I do not believe that tourism growth in Louisiana has been as strong as has been publicized.	1	2	3	4	5
(o) If the current visitor volume to my attraction does not change, I will be happy.	1	2	3	4	5
(p) The number of visitors to my attraction must grow in order to keep my attraction open.	1	2	3	4	5
(q) I am interested in improving my attraction's appeal to gain more visitors.	1	2	3	4	5
(r) There needs to be more coordination and cooperation between attractions like mine and Louisiana's tourism promotion efforts.	1	2	3	4	5

20. Please check the top **five** business management problems being experienced by your attraction.

___Insurance
___Litter
___Promotion/Advertising
___Extensive Paperwork
___Inability to hire and/or retain employees
___Ability to secure good business financing
___Seasonality of Business
___Crime
___Other (Specify) ____________________

21. What type(s) of advertising do you currently use to promote your business? (Check all that apply.)

___a. Louisiana Tour Guide
___b. Newspapers
___c. Magazines
___d. Television
___e. Radio
___f. Yellow Pages
___g. Internet
___h. Signs/billboards
___i. Brochures
___j. Direct Mail
___k. Trade Shows
___l. LTPA (Louisiana Travel Promotion Association)
___m. LAA (Louisiana Attractions Association)
___n. Other (Specify)____________________

22. Do you do any cooperative marketing?

No____
Yes____

If **yes**, with whom?________________________________
____

23. What are the top three things visitors tell you that they **enjoy** about your attraction?

1) ________________________________
2) ________________________________
3) ________________________________

24. What are the top three things visitors tell you that they **do not like** about your attraction?

1) ________________________________
2) ________________________________
3) ________________________________

25. What are the top three things visitors tell you that they **enjoy** about Louisiana?

1) ________________________________
2) ________________________________
3) ________________________________

26. What are the top three things visitors tell you that they **do not like** about Louisiana?

1) ________________________________
2) ________________________________
3) ________________________________

27. What, if anything, do you think your attraction could do to improve attendance?

____
____
____
____
____

28. In what area(s) or on what topic(s) do you feel that you could use more information and/or training?

____
____
____

Please return the completed questionnaire in the enclosed self-addressed stamped envelope by NOVEMBER 9, 1998.

LOUISIANA STATE UNIVERSITY
and Agricultural and Mechanical College
Louisiana Sea Grant College Program
Office of Sea Grant Development

Louisiana Attractions Survey

Dear State Welcome Center Supervisor,

The Louisiana Sea Grant College Program at LSU is conducting a survey of our state's attractions to obtain information concerning visitors, changes, trends and other factors that may be affecting our attractions. You and your key staff's input is very important to the success of the project, and we appreciate everyone taking the time to complete and return this questionnaire. Rest assured that your feedback will remain strictly confidential! A copy of the final report will be mailed to you in the spring of 1999.

1. Name of Welcome Center____

2. Please circle the number that best applies to **your personal opinion** of whether the following trends or events have affected visitation patterns to Louisiana attractions?

	Strongly Agree	**Moderately Agree**	**No Opinion**	**Moderately Disagree**	**Strongly Disagree**
(a) Casinos and/or riverboats in Louisiana have helped increase visitation to our attractions.	1	2	3	4	5
(b) Casinos in Mississippi have diverted visitors away from our attractions.	1	2	3	4	5
(c) The State's out-of-state advertising efforts have increased the number of visitors to my region.	1	2	3	4	5
(d) National economic conditions have a lot to do with how many visitors we see during any given year.	1	2	3	4	5
(e) Our Office of Tourism is doing enough to attract international visitors to Louisiana.	1	2	3	4	5
(f) Visitors are satisfied with the quality of our attractions. They are clean, accessible, appealing, educational, fun, etc.	1	2	3	4	5
(g) Our attractions have felt the impact of Louisiana's recent economic rebound.	1	2	3	4	5

	Strongly Agree	Moderately Agree	No Opinion	Moderately Disagree	Strongly Disagree
(h) Our attractions are in great shape. We only need to promote them more in order to get more visitors.	1	2	3	4	5
(i) There is a great deal of competition among the attractions.	1	2	3	4	5
(j) Recent news stories that gave Louisiana a negative image (crime and safety, *Dateline*, etc.) caused a decrease in visitations to my region.	1	2	3	4	5
(k) More state funds need to be expended to attract international visitors.	1	2	3	4	5
(l) We should be concerned about visitor volumes to our attractions.	1	2	3	4	5
(m) Changes are needed in the State's advertising to improve attendance at our attractions.	1	2	3	4	5
(n) I do not believe that tourism growth in Louisiana has been as strong as has been publicized.	1	2	3	4	5
(o) If the current visitor volume to our attractions does not change, we should be happy.	1	2	3	4	5
(p) There needs to be more coordination and cooperation between attractions and our state Welcome Centers.	1	2	3	4	5

3. What are the top three things visitors tell you that they **enjoy** about Louisiana?

1) ______________________________

2) ______________________________

3) ______________________________

4. What are the top three things visitors tell you that they **do not like** about Louisiana?

1) ______________________________

2) ______________________________

3) ______________________________

5. What, if anything, do you think our **attractions** could do to improve attendance?

6. What, if anything, do you think that your **Welcome Center** could do to help improve attendance at our state's attractions?

7. In what area(s) or on what topic(s) do you feel you could use more information and/or training?

8. We are planning a roundtable discussion involving key individuals representing the state's Welcome Centers, the Louisiana Attractions Association and the LTPA. What attractions-related topics would you like to see covered during this meeting?

APPENDIX II

RESPONSES TO QUESTIONNAIRE STATEMENTS

Table 1A.
Regional Responses to
Questionnaire Statements Regarding Visitation

	Sportsman's Paradise (26 responses)			Crossroads (23 responses)			Cajun Country (50 responses)			Plantation Country (30 responses)			New Orleans (30 responses)		
	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %
Casinos and/or riverboats in Louisiana have helped increase visitation to my attraction.	48	12	40	17	22	61	23	19	57	3	21	76	13	20	67
Casinos in Mississippi have diverted visitors away from my attraction.	4	24	72	17	30	52	19	43	38	38	34	28	20	33	47
The State's out-of-state advertising efforts have increased the number of visitors to my attraction	68	24	8	70	17	13	67	27	6	48	41	10	57	23	20
National economic conditions have a lot to do with how many visitors I have during any given year.	56	24	20	70	17	13	74	13	13	64	25	11	70	13	17
My attraction has felt the impact of Louisiana's recent economic rebound	52	32	16	61	30	9	70	17	13	45	34	21	80	17	3
Recent news stories that gave Louisiana a negative image (crime and safety, *Dateline*, etc.) caused a decrease in visitations to my attraction.	4	32	64	13	39	48	27	25	48	34	31	34	27	33	40

Table 1B.
Attractions' Responses to
Questionnaire Statements Regarding Visitation

	Museums, Plantations, Swamp Tours			State Parks, National Parks, NWRs			Statewide Totals		
	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %
Casinos and/or riverboats in Louisiana have helped increase visitation to my attraction.	16	18	66	27	21	52	21	19	60
Casinos in Mississippi have diverted visitors away from my attraction.	31	34	34	4	34	61	20	34	45
The State's out-of-state advertising efforts have increased the number of visitors to my attraction	70	23	7	63	28	9	62	27	11
National economic conditions have a lot to do with how many visitors I have during any given year.	73	17	10	60	22	18	68	18	14
My attraction has felt the impact of Louisiana's recent economic rebound.	58	32	10	64	24	12	63	25	12
Recent news stories that gave Louisiana a negative image (crime and safety, *Dateline*, etc.) caused a decrease in visitations to my attraction.	32	32	36	7	31	61	23	31	46

Table 1C.
Selected Attractions' Responses to
Questionnaire Statements Regarding Visitation

	Historic and Cultural (Museums and Plantations)			Swamp Tours		
	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %
Casinos and/or riverboats in Louisiana have helped increase visitation to my attraction.	21	18	61	8	19	73
Casinos in Mississippi have diverted visitors away from my attraction.	31	38	31	32	28	40
The State's out-of-state advertising efforts have increased the number of visitors to my attraction	73	22	5	65	23	12
National economic conditions have a lot to do with how many visitors I have during any given year.	73	16	11	73	19	8
My attraction has felt the impact of Louisiana's recent economic rebound	53	33	14	65	31	4
Recent news stories that gave Louisiana a negative image (crime and safety, *Dateline*, etc.) caused a decrease in visitations to my attraction.	27	42	31	42	16	42

Table 1D.
Casinos and Racetracks' Responses to Questionnaire Statements Regarding Visitation

	Casinos and Racetracks		
	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %
Louisiana's parks, museums and attractions have helped increase visitation to my site.	13	50	37
Gaming facilities in Mississippi are diverting potential customers from my site.	56	11	33
The State's out-of-state advertising efforts have increased the number of visitors to my attraction	25	12	63
National economic conditions have a lot to do with how many visitors I have during any given year.	56	22	22
My attraction has felt the impact of Louisiana's recent economic rebound.	67	11	22
Recent news stories that gave Louisiana a negative image (crime and safety, *Dateline*, etc.) caused a decrease in visitations to my attraction.	22	33	44

Table 2A.
Regional Responses to
Questionnaire Statements Regarding State's Advertising Efforts

	Sportsman's Paradise (26 responses)			Crossroads (23 responses)			Cajun Country (50 responses)			Plantation Country (30 responses)			New Orleans (30 responses)		
	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %
The Office of Tourism is doing enough to attract international visitors to Louisiana.	46	33	21	70	17	13	69	19	12	50	30	20	60	20	20
More state funds need to be expended to attract international visitors.	52	32	16	13	39	48	57	32	11	60	33	7	70	30	0
Changes are needed in the State's advertising to improve my attraction's attendance.	58	27	15	9	4	87	57	31	12	66	24	10	53	30	17
There needs to be more coordination and cooperation between attractions like mine and Louisiana's tourism promotion efforts.	88	12	0	95	0	5	75	21	4	90	3	7	77	10	13

Table 2B.
Attractions' (including Casinos and Racetracks) Responses to
Questionnaire Statements Regarding State's Advertising Efforts

	Museums, Plantations, Swamp Tours			Casinos and Racetracks			State Parks, National Parks, NWRs			Statewide Totals		
	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %
The Office of Tourism is doing enough to attract international visitors to Louisiana	67	17	16	33	33	33	51	31	18	60	23	17
More state funds need to be expended to attract international visitors	67	26	7	22	44	33	52	36	12	53	33	14
Changes are needed in the State's advertising to improve my attraction's attendance.	54	31	15	33	56	11	64	19	17	51	25	24
There needs to be more coordination and cooperation between attractions like mine and Louisiana's tourism promotion efforts	82	13	6	67	22	11	86	13	1	83	11	6

Table 2C.
Selected Attractions' Responses to
Questionnaire Statements Regarding State's Advertising Efforts

	Historic and Cultural (Museums and Plantations)			Swamp Tours		
	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %
The Office of Tourism is doing enough to attract international visitors to Louisiana.	70	16	14	62	19	19
More state funds need to be expended to attract international visitors.	68	27	5	65	23	12
Changes are needed in the State's advertising to improve my attraction's attendance.	51	38	11	59	19	22
There needs to be more coordination and cooperation between attractions like mine and Louisiana's tourism promotion efforts.	84	11	5	78	15	7

Table 3A.
Attractions' Responses to Questionnaire Statements Regarding Visitor Volumes

	Sportsman's Paradise (26 responses)			Crossroads (23 responses)			Cajun Country (50 responses)			Plantation Country (30 responses)			New Orleans (30 responses)		
	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %
I am not concerned about the current visitor volume to my attraction.	28	4	68	52	35	13	34	4	62	10	10	80	17	7	77
I do not believe that tourism growth in Louisiana has been as strong as has been publicized.	38	35	27	59	18	23	24	39	37	34	45	21	21	40	38
If the current visitor volume to my attraction does not change, I will be happy.	8	8	84	40	26	34	15	12	73	17	10	72	13	10	77
The number of visitors to my attraction must grow in order to keep my attraction open.	46	15	38	13	0	87	35	27	38	46	18	36	37	13	50

Table 3B.
Attractions' (including Casinos and Racetracks) Responses to Questionnaire Statements Regarding Visitor Volumes

	Museums, Plantations, Swamp Tours			Casinos and Racetracks			State Parks, National Parks, NWRs			Statewide Totals		
	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %
I am not concerned about the current visitor volume to my attraction	25	3	72	11	11	78	21	10	69	28	10	62
I do not believe that tourism growth in Louisiana has been as strong as has been publicized.	38	27	35	33	22	44	23	44	33	33	37	30
If the current visitor volume to my attraction does not change, I will be happy.	21	6	74	11	22	67	7	9	84	17	13	70
The number of visitors to my attraction must grow in order to keep my attraction open.	49	11	40	44	22	33	33	29	38	36	17	47

Table 3C.
Selected Attractions' Responses to
Questionnaire Statements Regarding Visitor Volumes

	Historic and Cultural (Museums and Plantations)			Swamp Tours		
	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %
I am not concerned about the current visitor volume to my attraction.	16	2	82	38	4	58
I do not believe that tourism growth in Louisiana has been as strong as has been publicized.	39	29	31	37	22	41
If the current visitor volume to my attraction does not change, I will be happy.	13	4	83	33	7	59
The number of visitors to my attraction must grow in order to keep my attraction open.	47	13	40	52	7	41

Table 4A.
Attractions' Responses to Questionnaire Statements Regarding Quality of Attraction

	Sportsman's Paradise (26 responses)			Crossroads (23 responses)			Cajun Country (50 responses)			Plantation Country (30 responses)			New Orleans (30 responses)		
	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %
I am satisfied with the quality of my attraction. It is clean, accessible, appealing, educational, fun, etc.	92	0	8	96	0	4	94	0	6	97	0	3	93	0	7
My attraction is in great shape, and I have spent a great deal of money and time on it. I only need help in promoting my attraction to get more visitors.	72	12	16	68	5	27	81	13	6	89	11	0	80	13	7
There are quite a few attractions like mine in the general vicinity. This is not helping my operation.	16	4	80	17	22	61	20	15	65	14	14	72	33	3	63
I am interested in improving my attraction's appeal to gain more visitors.	96	4	0	61	13	26	84	10	6	86	3	10	93	7	0

Table 4B.
Attractions' (including Casinos and Racetracks) Responses to Questionnaire Statements Regarding Quality of Attraction

	Museums, Plantations, Swamp Tours			Casinos and Racetracks			State Parks, National Parks, NWRs			Statewide Totals		
	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %
I am satisfied with the quality of my attraction. It is clean, accessible, appealing, educational, fun, etc.	96	0	4	89	0	11	93	0	7	94	0	6
My attraction is in great shape, and I have spent a great deal of money and time on it. I only need help in promoting my attraction to get more visitors	87	6	7	78	0	22	71	15	14	79	11	10
There are quite a few attractions like mine in the general vicinity. This is not helping my operation	25	12	63	33	33	33	13	13	73	20	12	68
I am interested in improving my attraction's appeal to gain more visitors	85	7	9	89	0	11	94	1	4	85	7	8

Table 4C.
Selected Attractions' Responses to
Questionnaire Statements Regarding Quality of Attractions

	Historic and Cultural (Museums and Plantations)			Swamp Tours		
	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %	Strongly/ Moderately Agree %	No Opinion %	Moderately/ Strongly Disagree %
I am satisfied with the quality of my attraction. It is clean, accessible, appealing, educational, fun, etc.	98	0	2	92	0	8
My attraction is in great shape, and I have spent a great deal of money and time on it. I only need help in promoting my attraction to get more visitors.	88	5	7	84	8	8
There are quite a few attractions like mine in the general vicinity. This is not helping my operation.	12	12	76	46	12	42
I am interested in improving my attraction's appeal to gain more visitors.	89	4	7	78	11	11