

MISSOURI VISITOR PROFILE & TRIP INSIGHTS

FY 2021



Demographics

The demographics of Missouri's travelers from across the country provide strategic insight into who Missouri's travelers are in terms of age, education, marital status, income and ethnicity. When the Missouri Division of Tourism (MDT) and their marketing agencies of record begin formulating plans for marketing campaigns, knowing the makeup of who is the Missouri traveler is critical to successfully attracting out-of-state visitors.

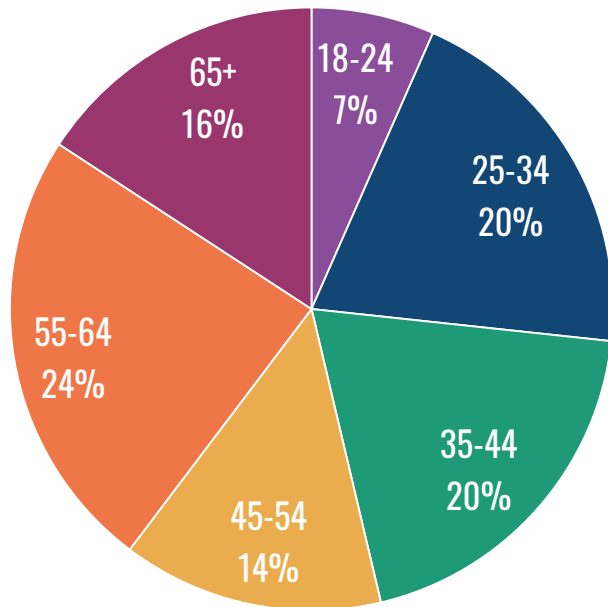
The next few pages of this report will answer that critical question: What does the Missouri traveler look like?

- Age
- Marital Status
- Household Income
- Education
- Ethnicity
- Hispanic Origin

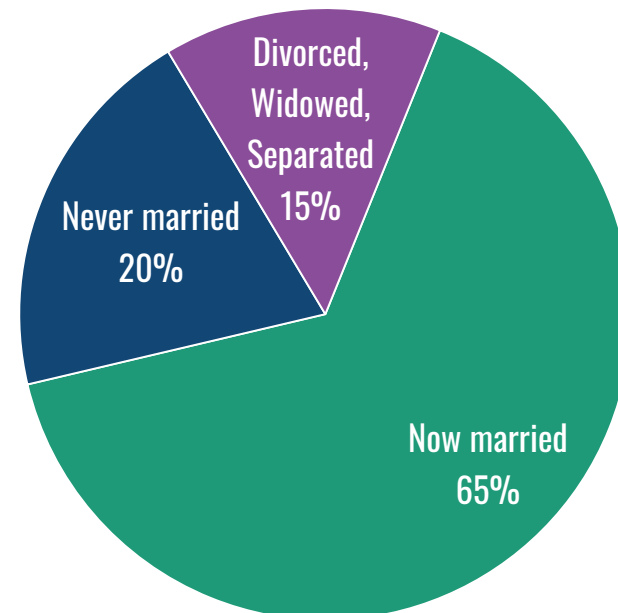
Age & Marital Status

- Nearly one-fourth of Missouri visitors were age 55 - 64 years old (24%), while 20% fell into the 25 – 34 years old age range. Average age of Missouri adult visitors was 47.3, slightly older than FY2020's average age of 45.16.
- Approximately two-thirds of visitors to the Show-Me State were currently married (65%).

Age Distribution of Missouri Visitors



Marital Status of Missouri Visitors

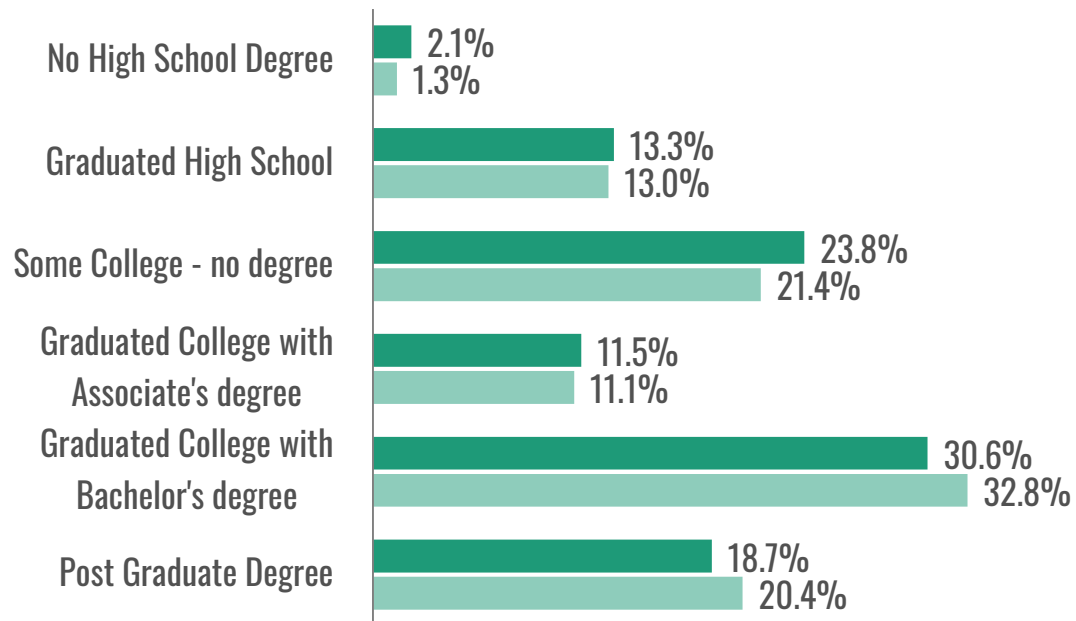


Education & Income



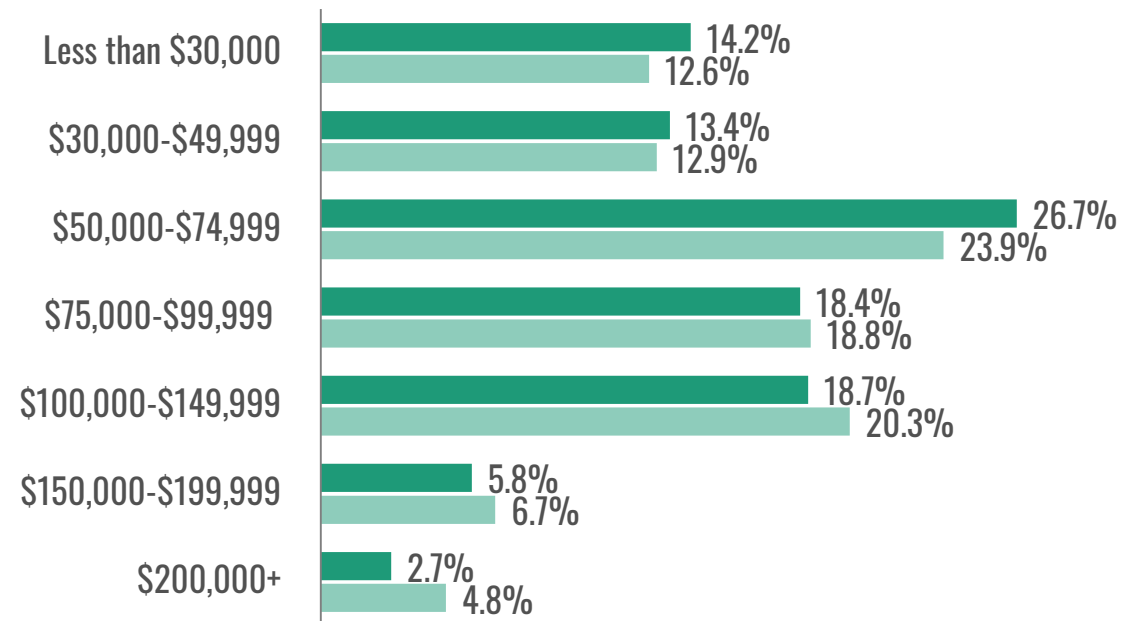
- Just under half (49%) of Missouri visitors have a bachelor's or graduate degree.
- The largest share (26.7%) of Missouri visitors had a household income of \$50,000 - \$74,999
- A little over one quarter (27.2%) of travelers visiting Missouri had a household income of \$100,000 or more.

Education



■ Missouri Visitors ■ U.S. Domestic Travelers

Annual Household Income

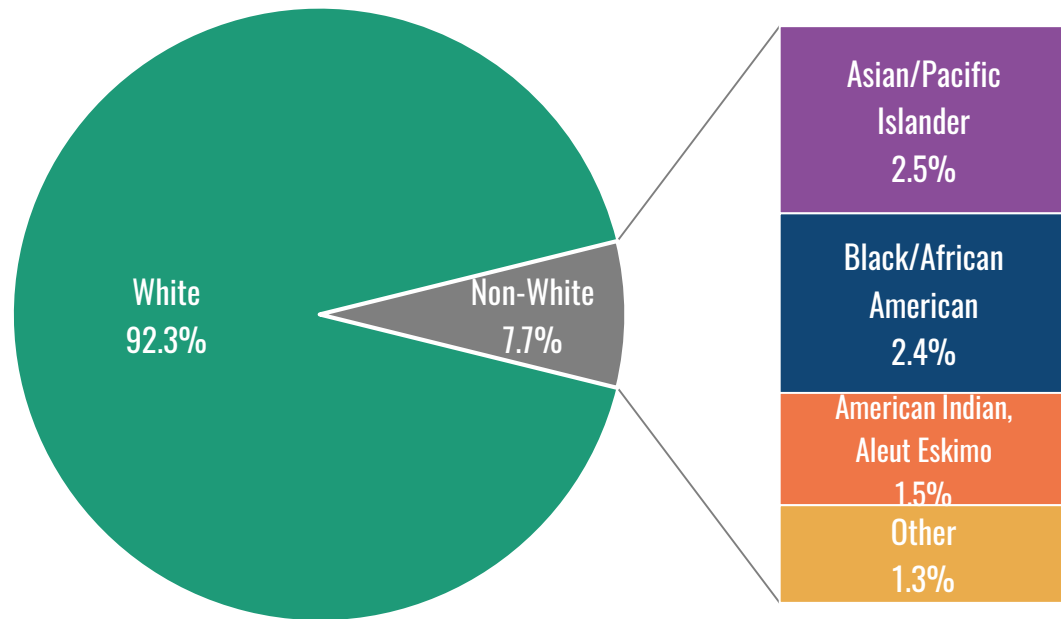


■ Missouri Visitors ■ U.S. Domestic Travelers

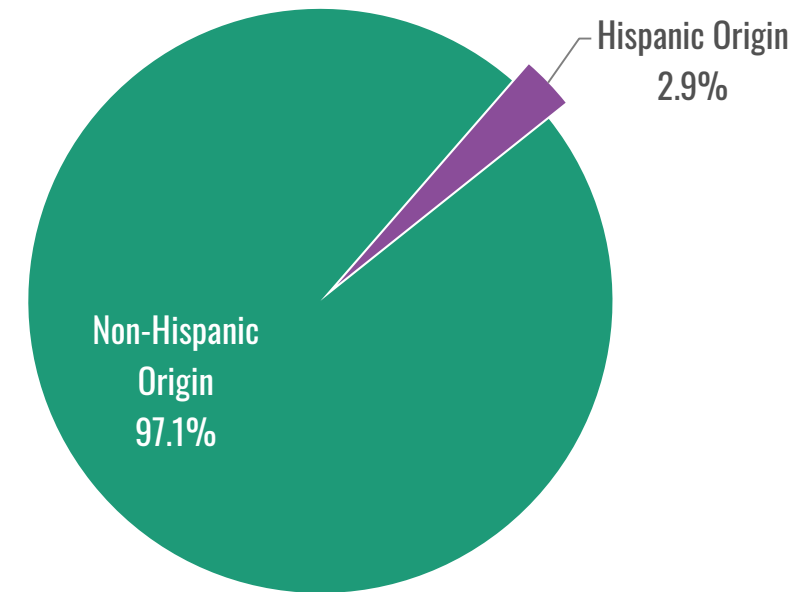
Ethnicity & Hispanic Origin

- Most Missouri visitors identify as White (92.3%), compared to 85.9% of U.S. domestic travelers (not shown).
- More than nine in ten Missouri visitors identify as non-Hispanic (97%). The portion of Missouri visitors who identified as Hispanic was smaller than that of U.S. domestic travelers (not shown) at 2.9% and 7.5%, respectively.

Ethnicity of Missouri Visitors



Hispanic & Non-Hispanic Missouri Visitors



Visitor Trip Characteristics

The characteristics of what we know about the trips taken by Missouri visitors mainly comes down to: Why did they come? Who came on the trip? What did they do? Where did they go? When did they come? How did they get here? Where did they stay?

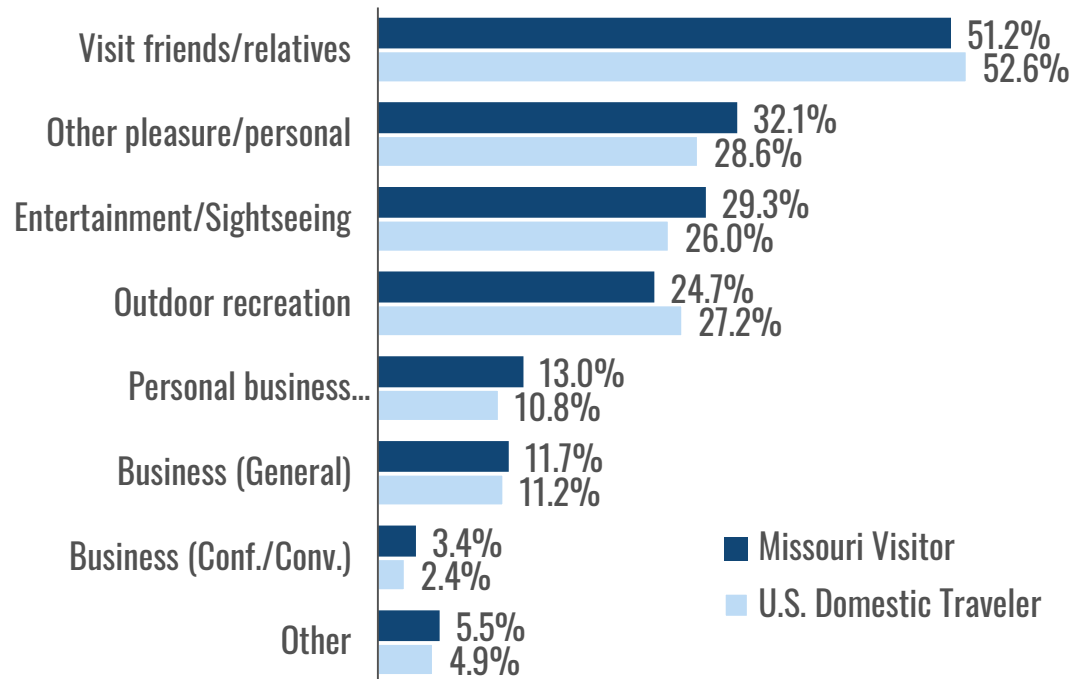
- Trip Type
- Repeat Visitation
- Trip Purpose
- Travel Party
- Transportation
- Accommodations
- Activities
- Seasonality
- Missouri Destinations



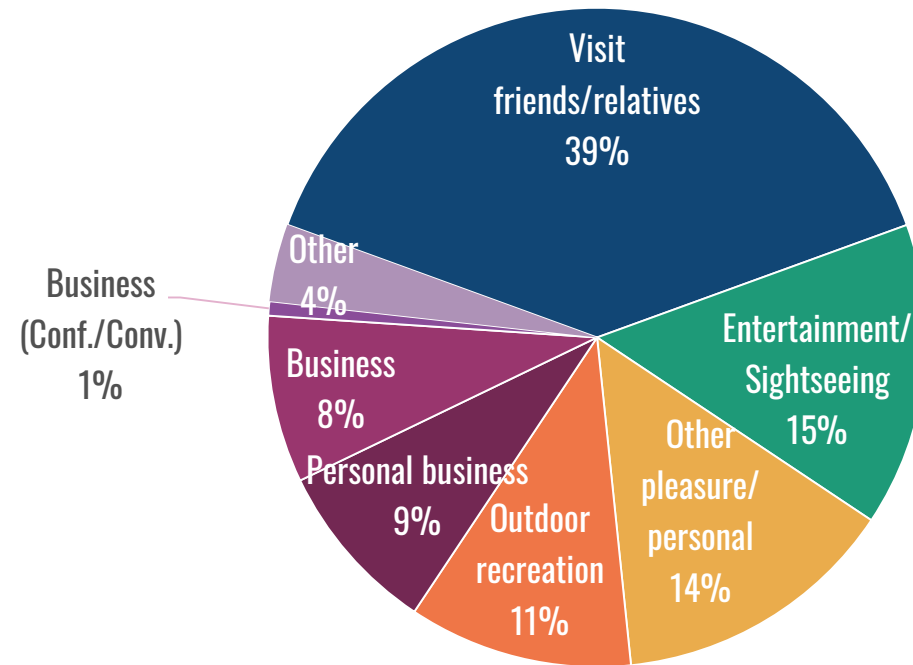
Trip Purpose

- Leisure travel dominates Missouri's tourism industry, with 87.0% of Missouri visitors indicating leisure was one of their trip purposes. When considering all purposes, half of Missouri visitors traveled to visit friends/relatives and 29.3% reported traveling for entertainment/sightseeing.
- Of those primarily traveling for business, 46.2% reported extending their stay for leisure.

All Trip Purposes



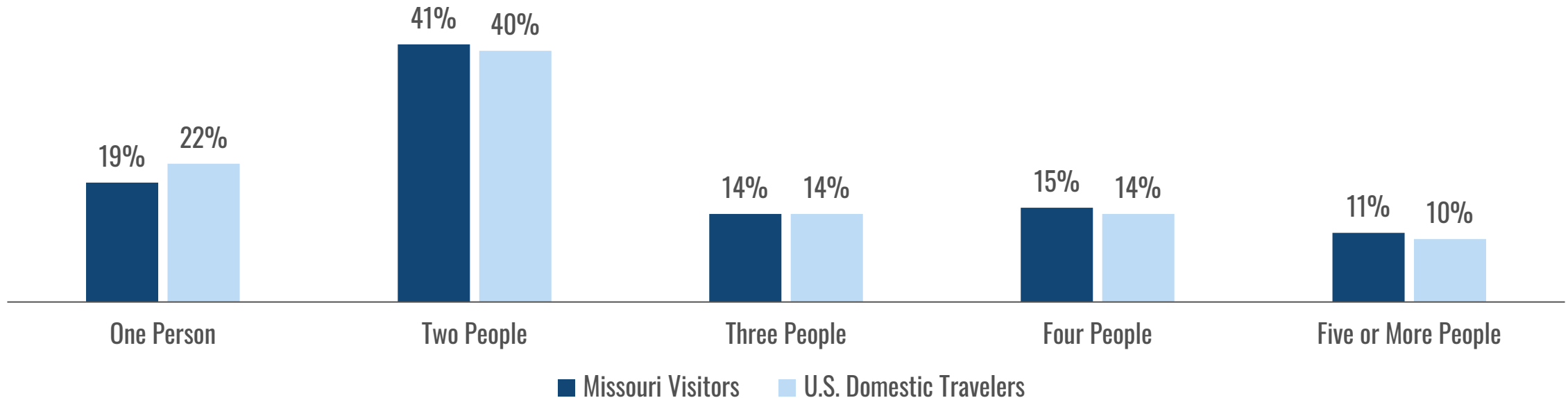
Missouri Visitors Primary Trip Purpose



Travel Party Size

- Most travel parties have two or more people in them--41% had two people traveling together and another 40% had three or more people in the travel party
- Average travel party size of Missouri visitors is 2.8.

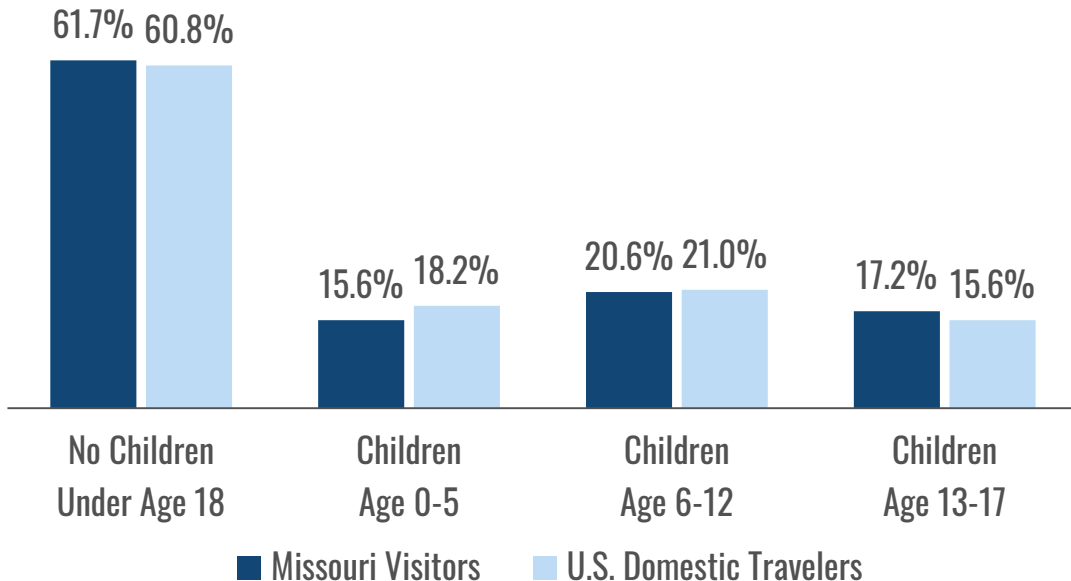
Travel Party Size



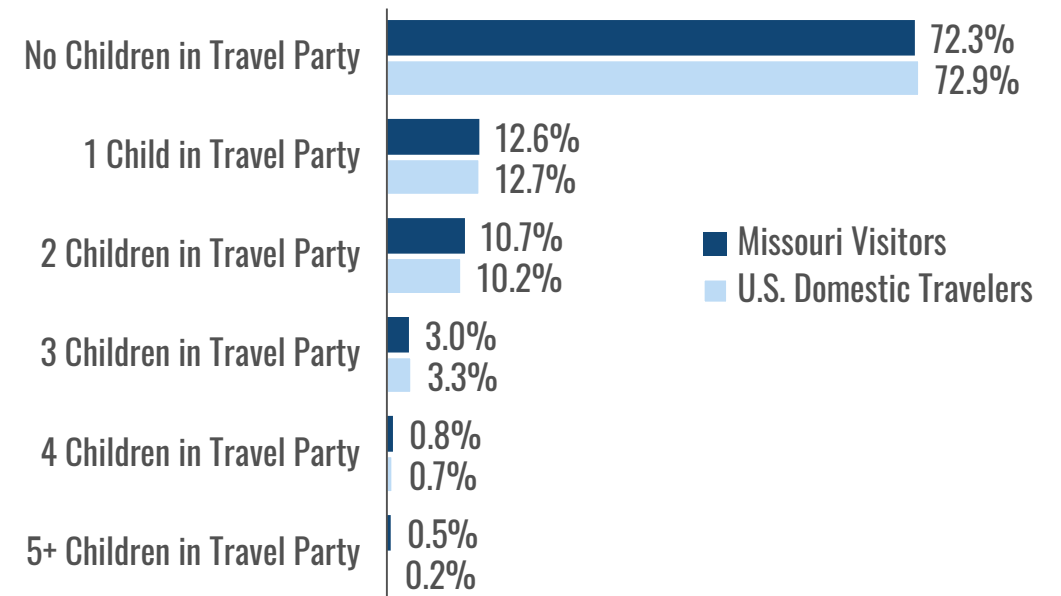
Children in Household & Travel Party

- Although 38.3% of Missouri visitors have children under 18 in their household, only 27.7% brought their children on their trip.
- This percentage is much less than the previous fiscal year when 35.7% of Missouri visitors reported traveling with children from their household.

Children Under 18 in Household



Household Children Under 18 in Travel Party

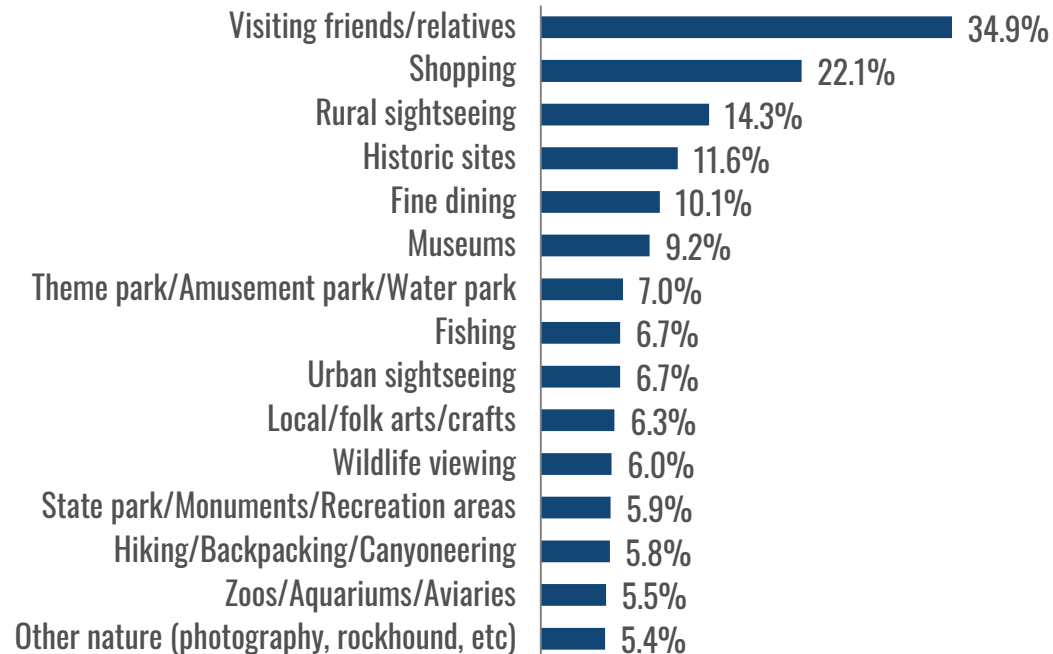


Top Visitor Activities

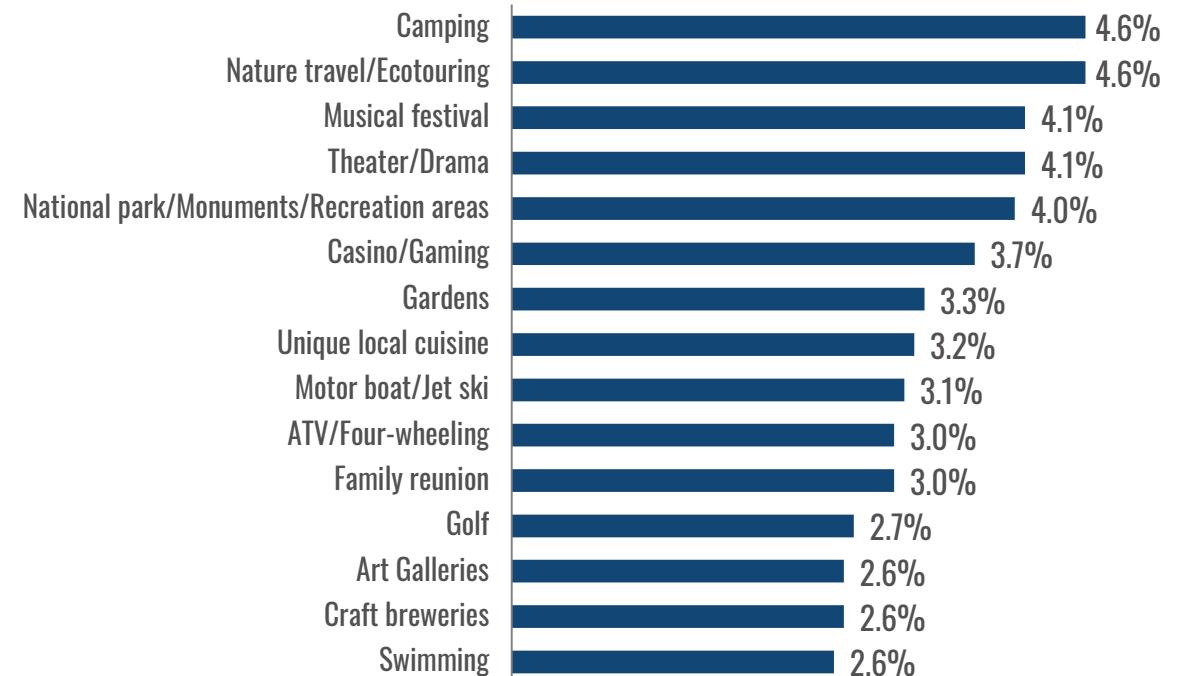


- Missouri visitors reported their top activities while visiting the state are visiting friends/relatives (34.9%), shopping (22.1%), and rural sightseeing (14.3%).
- Other top activities include historic sites (11.6%), fine dining (10.1%), museums (9.2%), and theme park/amusement park/water park (7.0%).

Top Traveler Activities within Missouri



Top Traveler Activities within Missouri (con.)



All Visitor Activities in Missouri

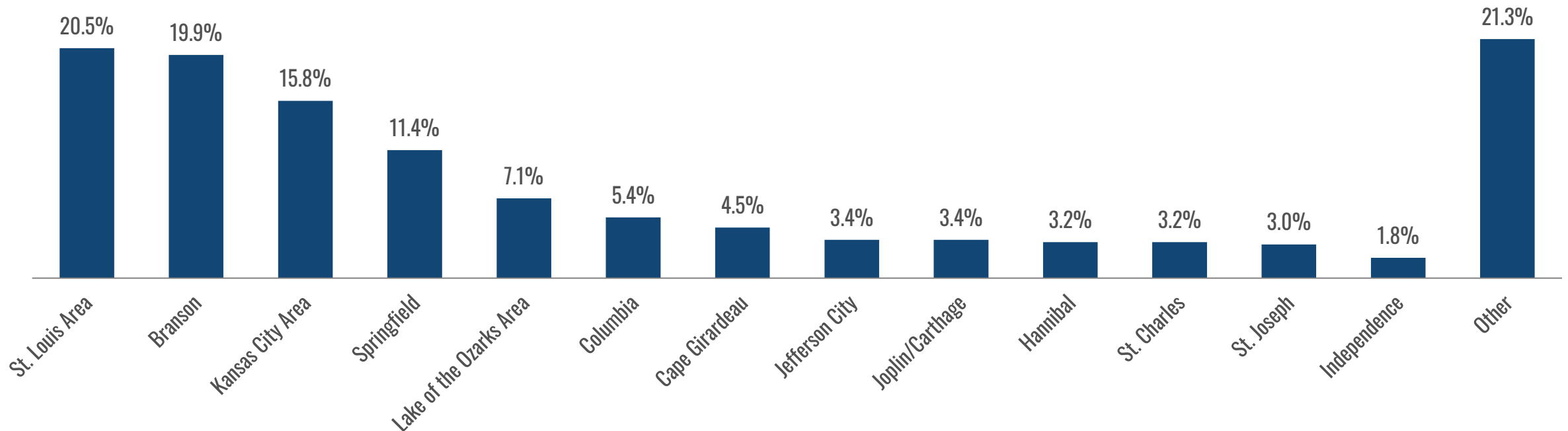


Visiting friends/relatives	34.9%	National park/Monuments/Rec areas	4.0%	Native American ruins/Rock art	1.4%
Shopping	22.1%	Casino/Gaming	3.7%	Special events/Festivals	1.4%
Rural sightseeing	14.3%	Gardens	3.3%	Biking/Road biking/Cycling	1.1%
Historic sites	11.6%	Unique local cuisine	3.2%	Horseback riding	1.0%
Fine dining	10.1%	Motor boat/Jet ski	3.1%	Mountain biking	1.0%
Museums	9.2%	ATV/Four-wheeling	3.0%	Spa/Health club	1.0%
Theme park/Amusement park/Water park	7.0%	Family reunion	3.0%	Sports events – <i>Participant</i> at Youth/Amateur/Collegiate/Other	1.0%
Fishing	6.7%	Golf	2.7%	Rock/Mountain climbing	1.0%
Urban sightseeing	6.7%	Art galleries	2.6%	Water skiing	0.9%
Local/Folk arts/Crafts	6.3%	Craft breweries	2.6%	Hang gliding/Skydiving/Base jumping	0.6%
Wildlife viewing	6.0%	Swimming	2.6%	Ocean/River cruise	0.6%
State park/Monuments/Rec areas	5.9%	Whitewater rafting/ Kayaking/Canoeing/ Paddleboarding	2.6%	Symphony/Opera/Concert	0.6%
Hiking/Backpacking/Canyoneering	5.8%	Bird watching	2.2%	Scuba diving/Snorkeling	0.5%
Zoos/Aquariums/Aviaries	5.5%	Sports events – <i>Spectator</i> at Youth/Amateur/Collegiate/Other	2.2%	Area where a TV or movie was filmed	0.4%
Other nature (photography, rock hound, etc.)	5.4%	Beach	2.0%	Motor sports-NASCAR/Indy	0.4%
Camping	4.6%	Wine tasting/Winery tour	2.0%	Skiing/snowboarding	0.4%
Nature travel/Ecotouring	4.6%	Nightclubs/Dancing	1.7%	Sailing	0.3%
Music festival	4.1%	Sports events – Major/Professional	1.7%	Windsurfing/Kiteboarding	0.3%
Theater/Drama	4.1%	Farms/Ranches/Agri-tours	1.6%	Other snow activities	0.2%

Missouri Destinations Visited

- St. Louis, Branson and Kansas City remain the top three places that travelers report visiting in Missouri.
- Springfield and the Lake of the Ozarks round out the top five places visited in Missouri.

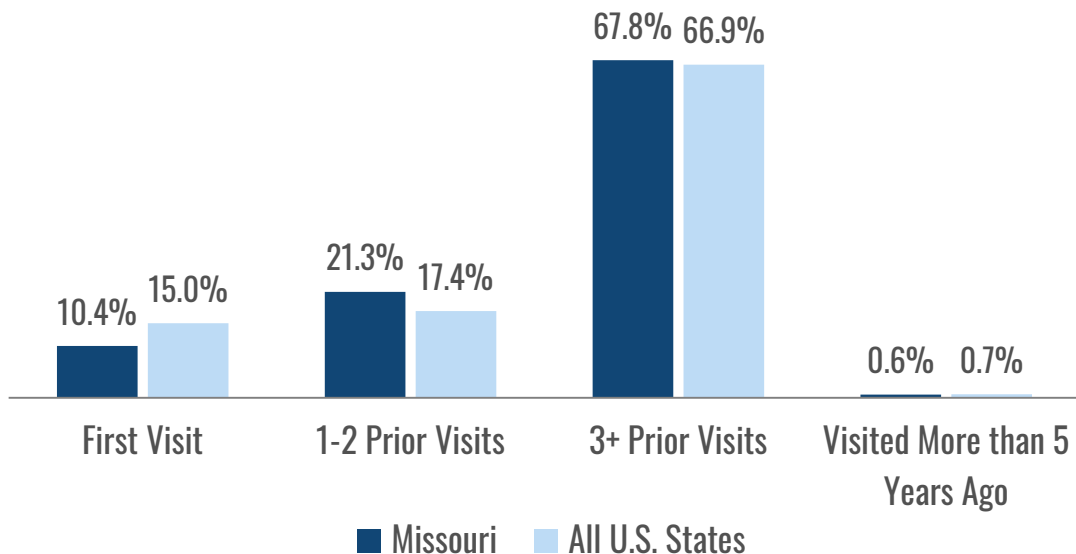
Missouri Destinations Visited



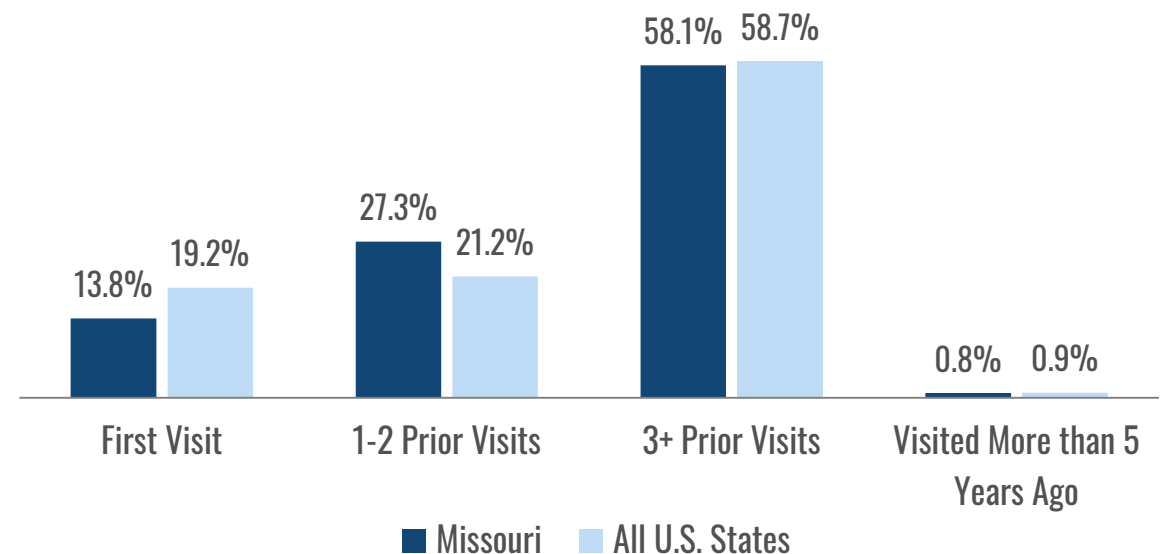
Repeat Overnight Visitation

- Nearly seven in ten visitors (67.8%) have traveled to Missouri three or more times in the last five years.
- Missouri doesn't do quite as well as the national average at attracting first time out-of-state visitors-- 13.8% of out-of-state visitors came to MO for the first time in FY2021 compared to 19.2% of visitors to all states being first timers. This is less than the 18.1% first time Missouri visitors attracted in FY2020.

First vs Repeat Overnight Visits to State(s) Past Five Years



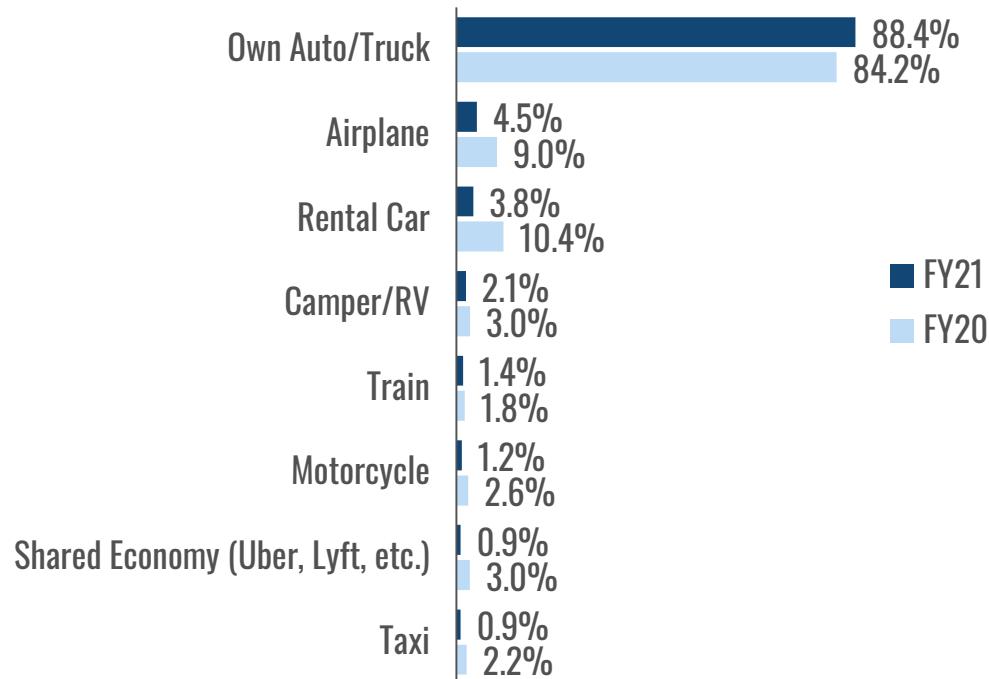
First vs Repeat Out-of-State Overnight Visits to State(s) Past Five Years



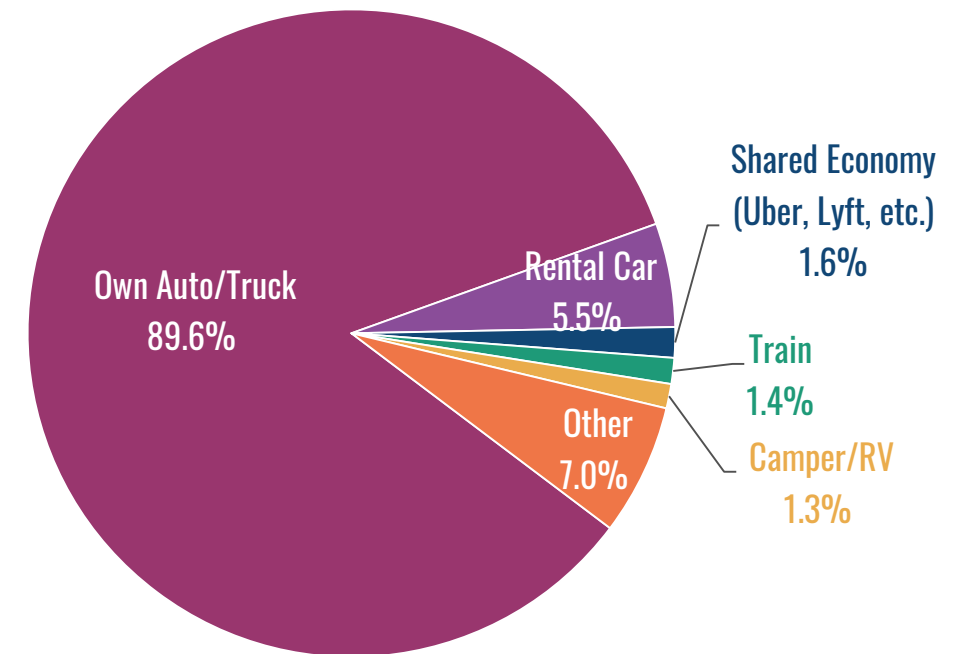
Transportation Modes

- Most visitors (89.6%) use their own vehicle as their transportation within Missouri.
- Only 4.5% of visitors traveled by air to get to Missouri, which is half of the 9.0% that did so in FY 2020 as COVID-19 concerns have curbed air travel demand.

Transportation Mode To Missouri



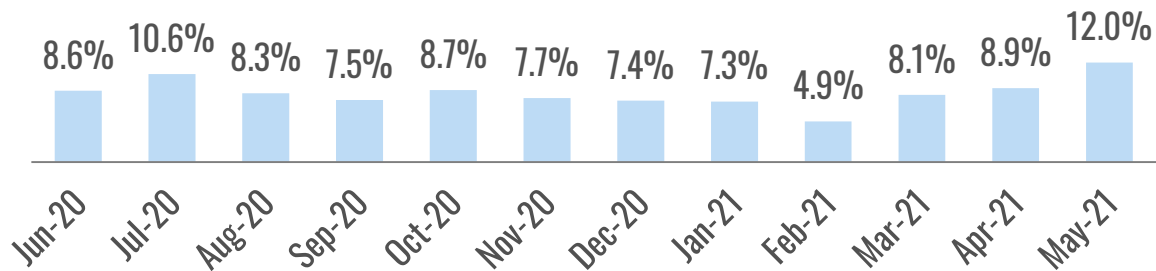
Transportation Mode Within Missouri



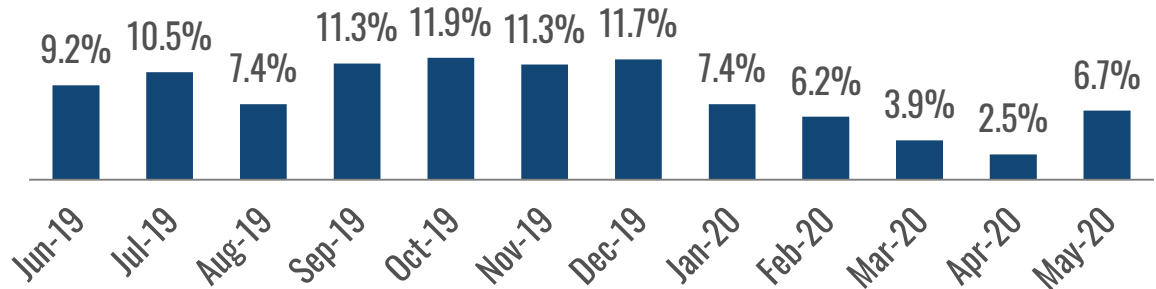
Seasonality of Missouri Tourism

- March through May 2021 were key months for visitors in FY21, making the spring the busiest season with 29.0% of FY21 visits. This is quite an increase from the Covid-ravaged months of Spring 2020 with 13.1% visitation.
- Winter and fall season had smaller shares of visitation compared to FY20, while spring and summer had larger shares of visitation.

FY21 Visitation by Month



FY20 Visitation by Month



Visitation by Season

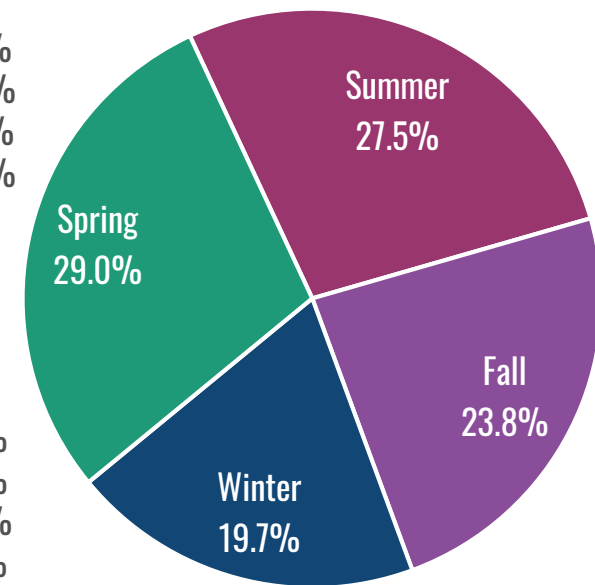
June 2020 to May 2021

Spring
FY18: 27.7%
FY19: 20.4%
FY20: 13.1%
FY21: 29.0%

Summer
FY18: 31.6%
FY19: 36.7%
FY20: 27.1%
FY21: 27.5%

Winter
FY18: 19.1%
FY19: 17.9%
FY20: 25.3%
FY21: 19.7%

Fall
FY18: 21.5%
FY19: 24.9%
FY20: 34.5%
FY21: 23.8%

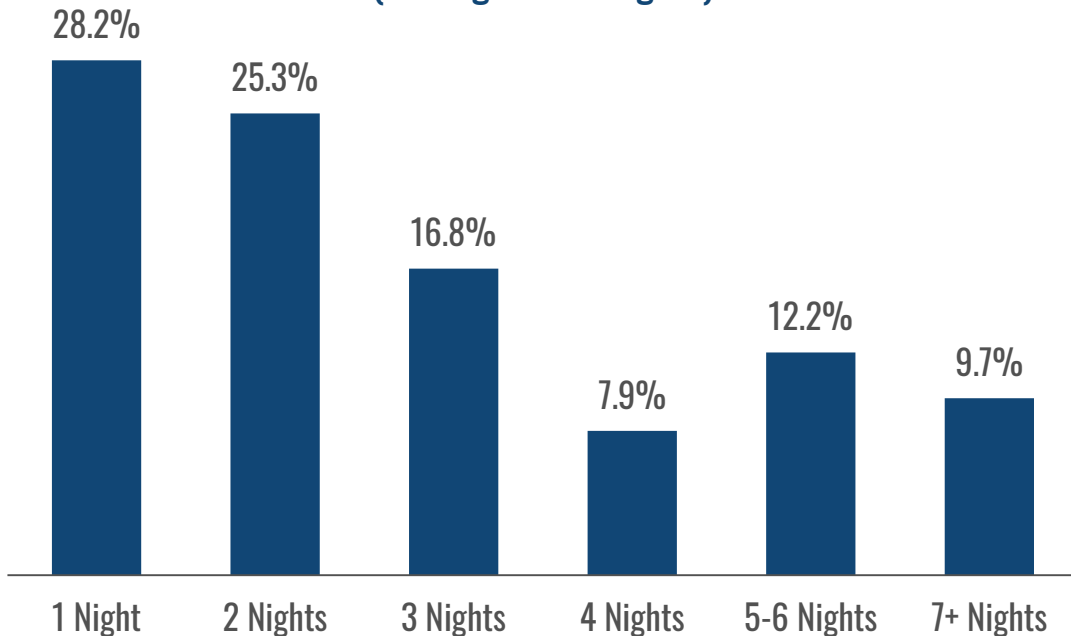


Missouri Nights Spent & Accommodations Used

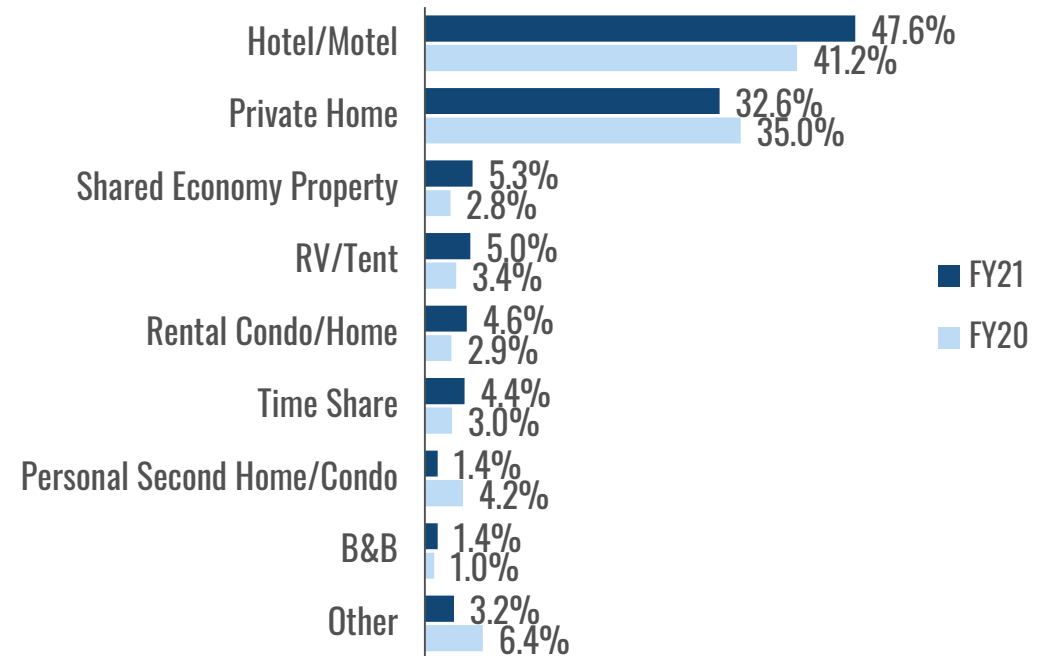


- Overnight visitors stayed an average of 3.3 nights in Missouri, an increase over last year's 2.76 with 71.8% staying at least 2 nights.
- The proportion of nights spent in a Missouri hotel/motel and shared economy properties increased in FY21, while nights in private homes and personal second homes/condos decreased.

Overnight Visitors Length of Stay in Missouri
(Average = 3.3 Nights)



Proportion of Nights in Missouri Accommodation Types



Attitudes Toward Travel and How Vacations are Planned

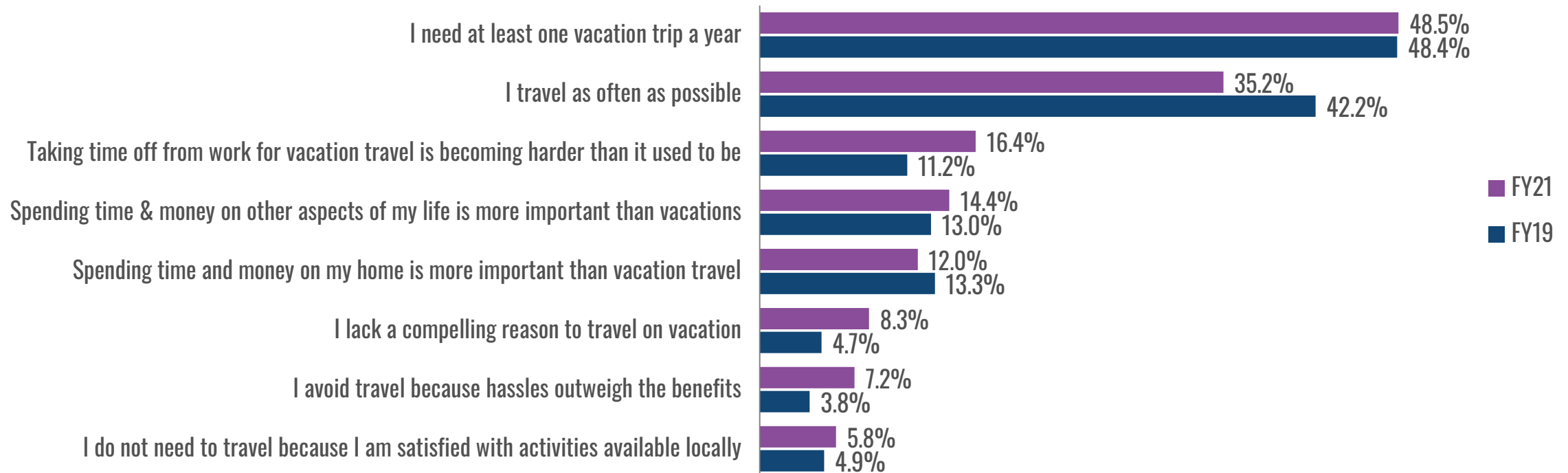
How do our Missouri visitors feel about the need to take a vacation? When are decisions made to travel? What resources do they use to plan their trips? Are they using their earned vacation days?

- Attitudes Towards Vacation Travel
- Feelings Compared to FY 2019
- Timing of Decision to Travel
- Trip Planning Sources

Attitudes Towards Vacations

- Similar to overall U.S. Travelers, nearly half of Missouri visitors (48.0%) feel a need to take at least one vacation a year.
- Meanwhile, over a third of Missouri visitors (35.2%) seek to travel as often as possible. This is several percentage points less than the 42.2% that said this in FY19.

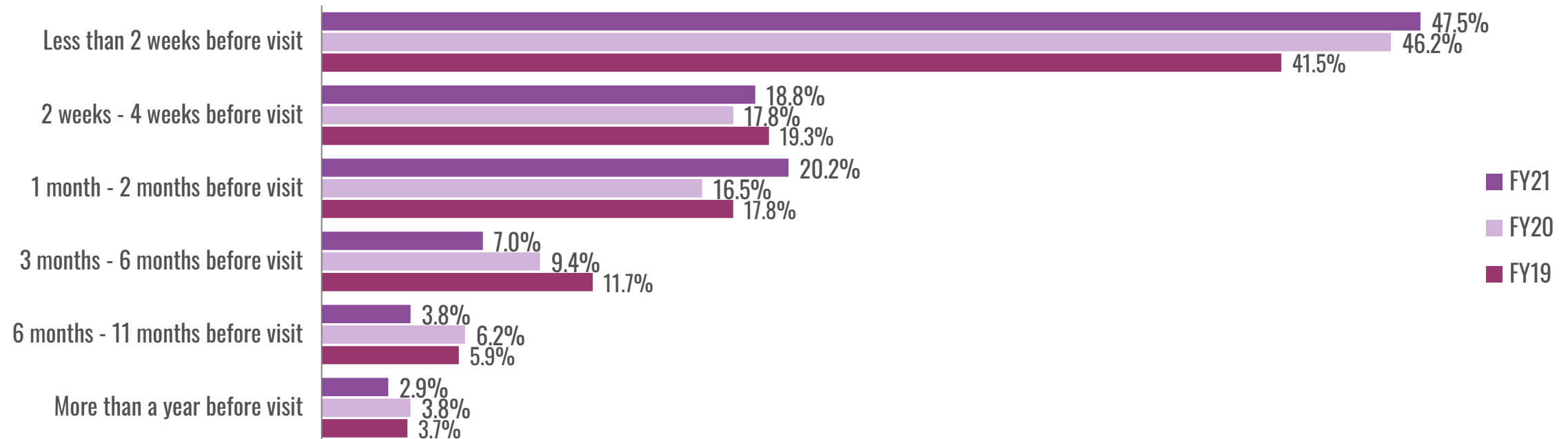
Attitudes Towards Vacation Travel



Travel Decision Timing

- Nearly half (47.5%) of visitors to Missouri decided to take the trip less than two weeks before the trip.
- The trip decision timeframe has continued to shorten over recent years.

Advance Decision to Visit

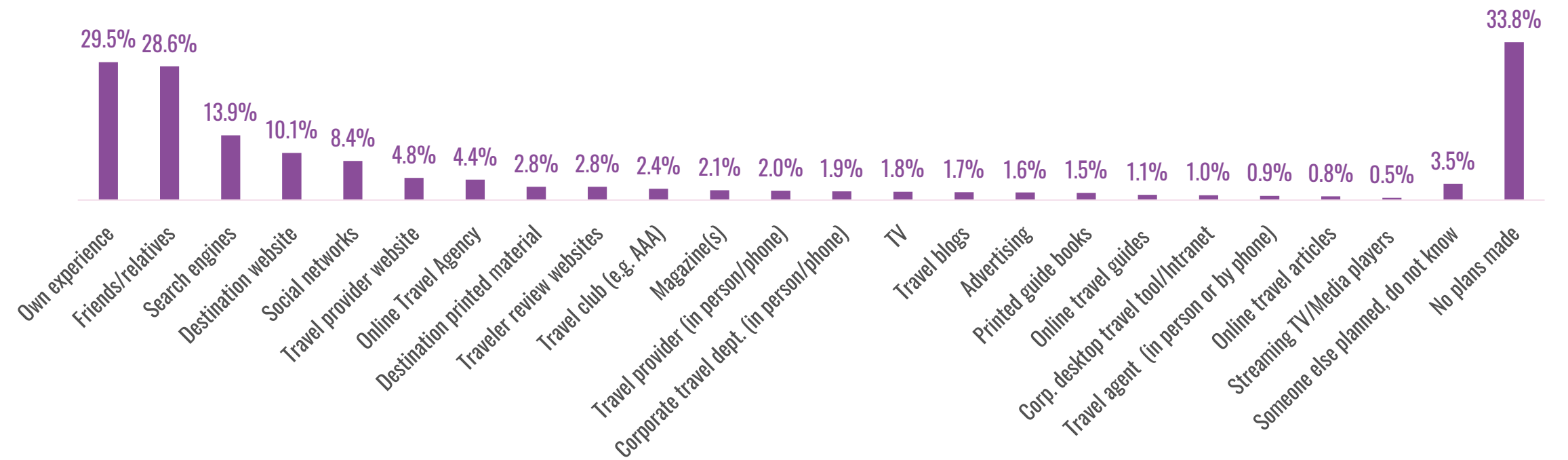


Trip Planning Sources



- Missouri visitors use various sources to plan travel with the largest shares using their own experience (29.5%) or advice from friends/relatives (28.6%)
- Search engines are the third most used planning source of information, used by 13.9% of Missouri visitors.
- At the same time, one-third reported making no plans (33.8%), a larger proportion compared to 24.1% reporting the same during pre-pandemic FY 2019.

Sources Used to Plan Missouri Visit



Note: Travel provider refers to the airline, hotel, rental car, etc. company

Source Markets

What do we know about Missouri travelers' home areas? What cities? What states? How does Missouri's market share of travel look?

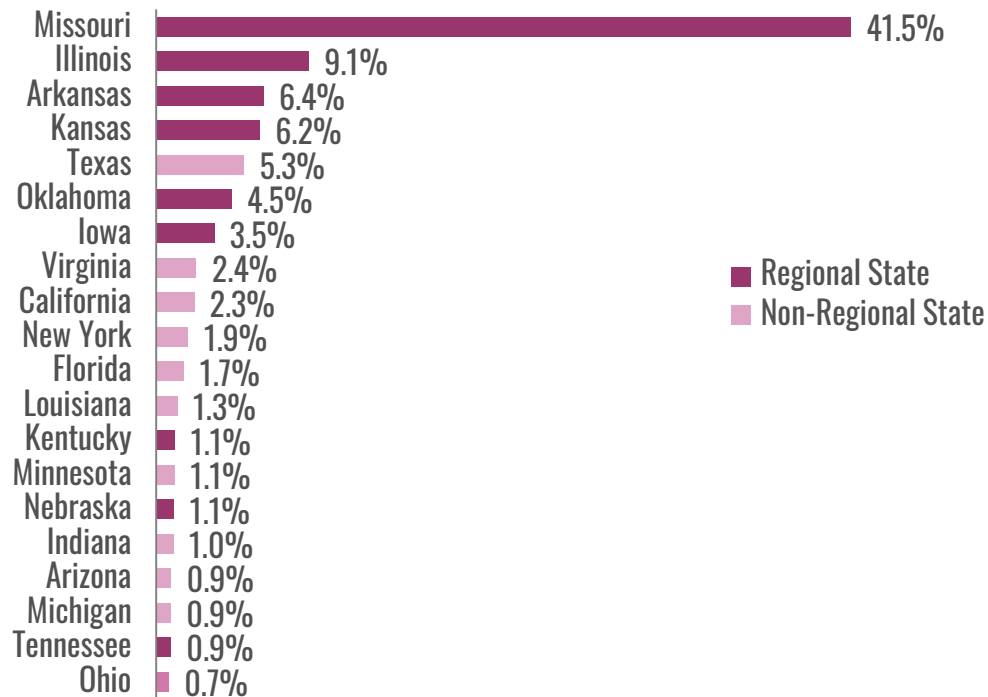
- Source Markets
- U.S. Market Share by State
- Map of Top Missouri Source Markets
- Missouri's Market Share

Missouri Source Markets

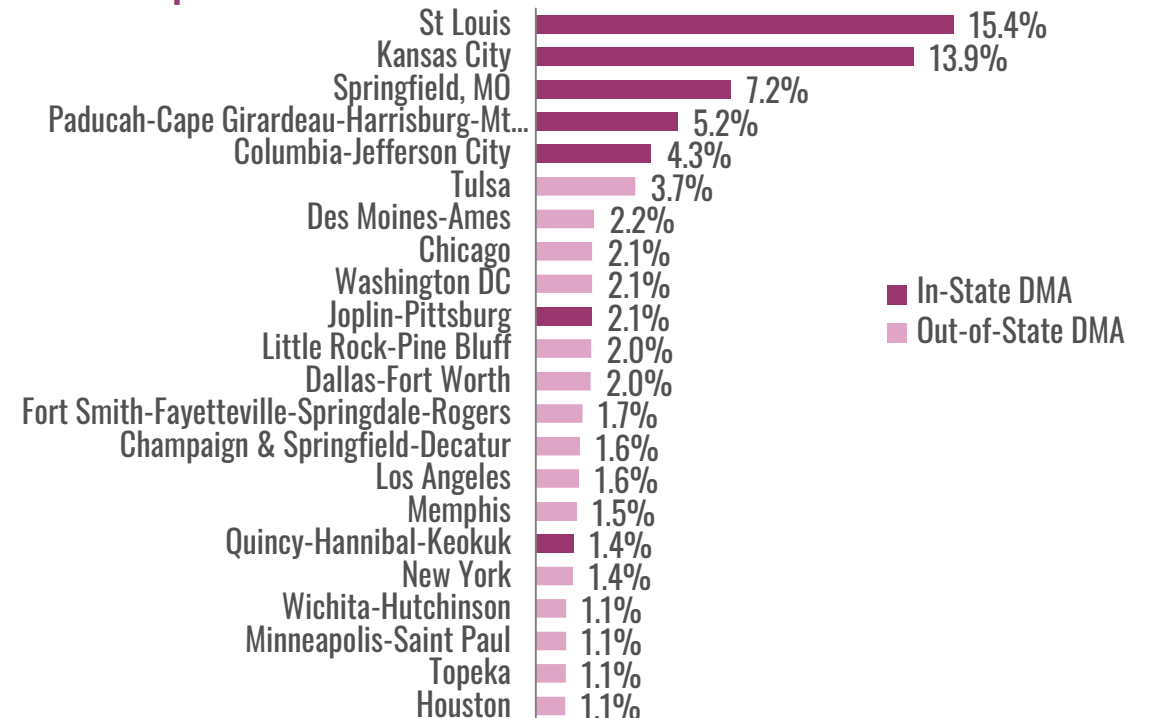


- Missouri tourism is mostly regional with 41.5% of all visitors residing within Missouri and 32.7% living in a neighbor state.
- In-state Designated Marketing Areas (DMA) provide Missouri's tourism industry with the most visitors, particularly larger metro areas.

Top State Source Markets for Missouri Visitors



Top DMA Source Markets for Missouri Visitors

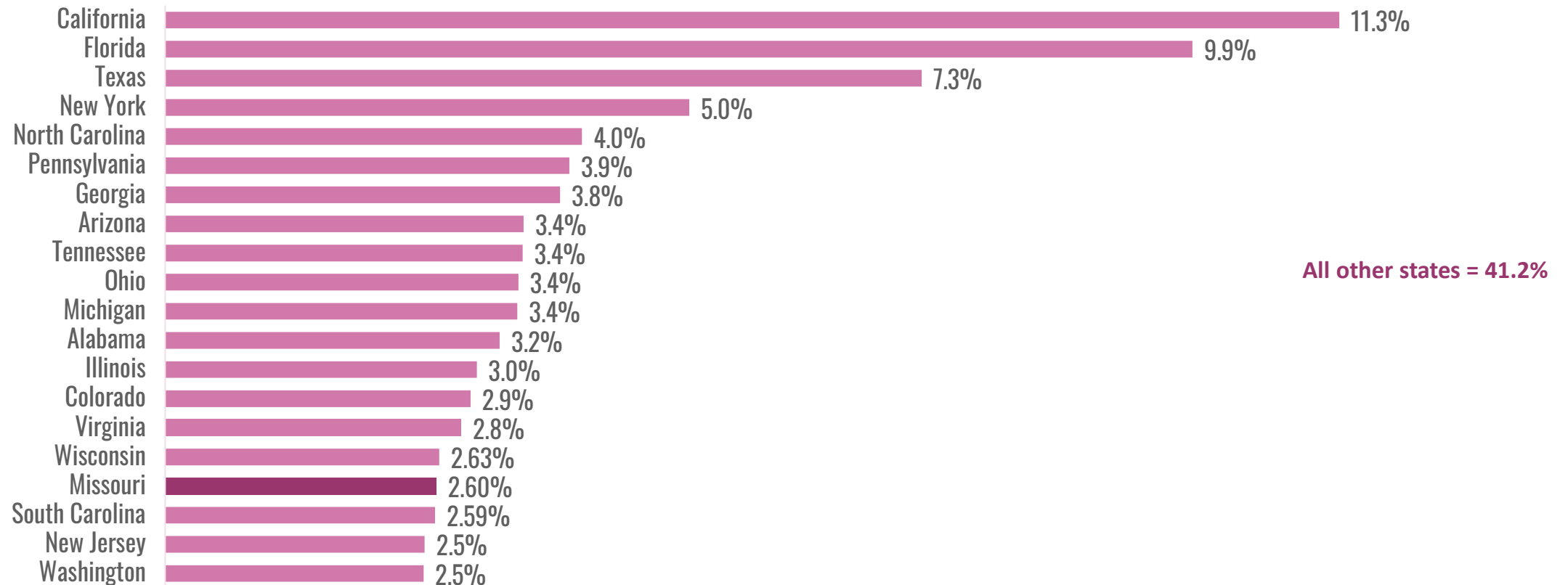


U.S. Market Shares by State

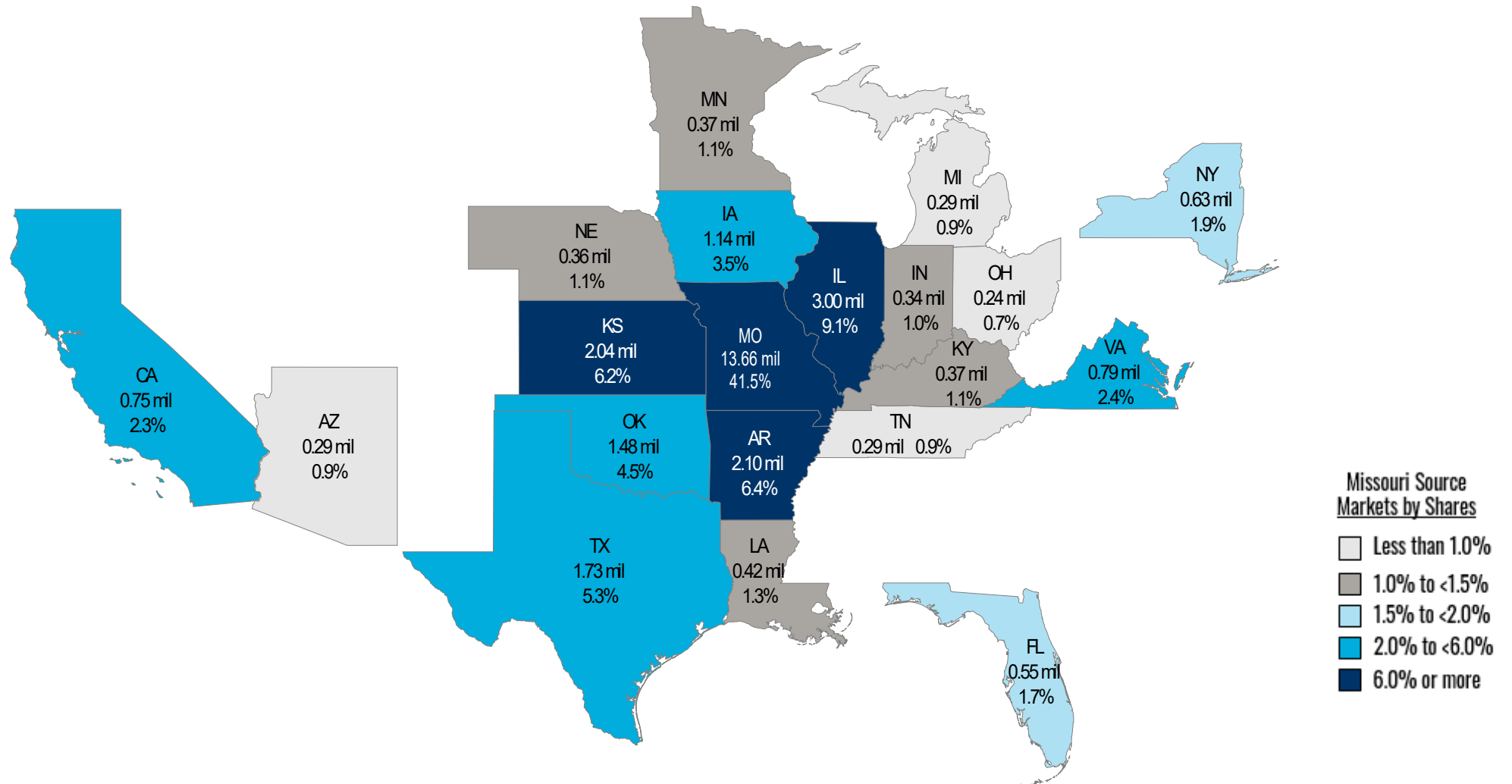


- Missouri captured 2.6% of all U.S. domestic visitors in FY 2021, slipping down to rank No. 17 from No. 15 in FY 2020.
- Virginia and Wisconsin moved ahead of Missouri in the ranking compared to FY 2020.

Top 20 States for Market Share of U.S. Domestic Visits



Map of Missouri Source Markets

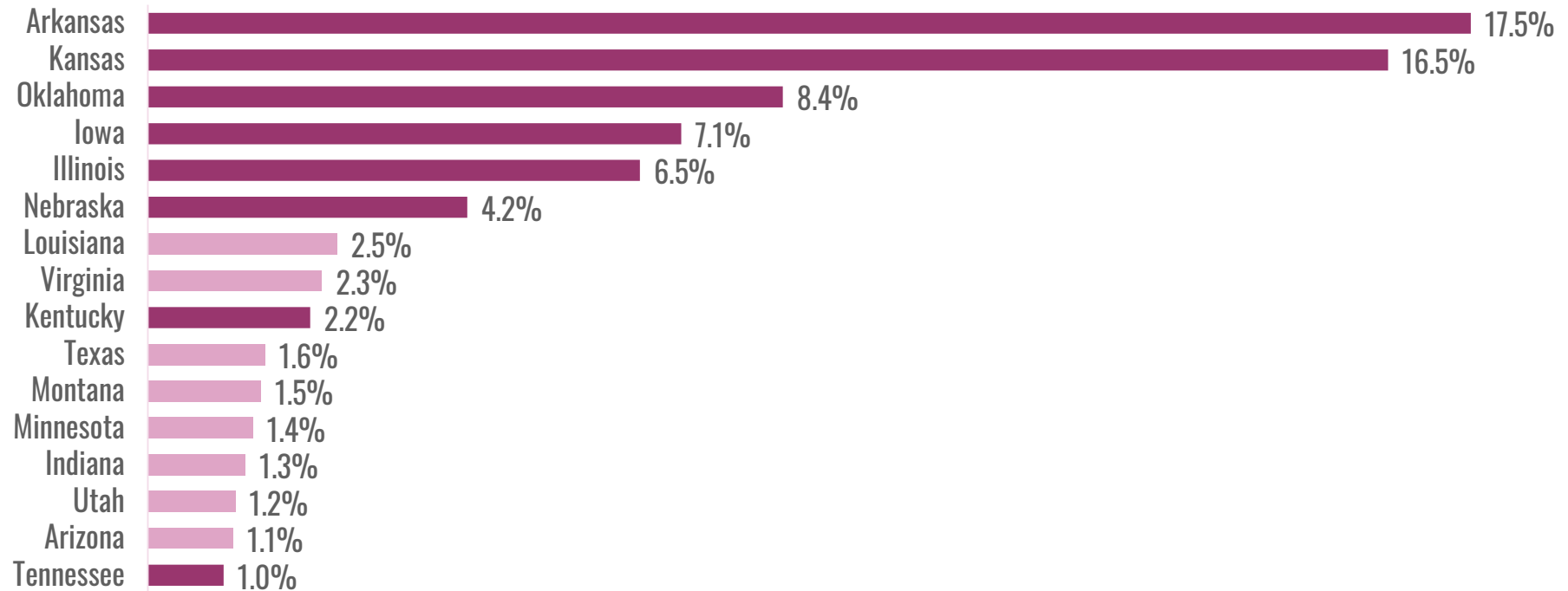


Missouri's Market Share



- In FY 2021, Missouri captured 17.5% of Arkansas outbound travelers, while capturing 16.5% of Kansas travelers and 8.4% of Oklahoma travelers.
- Of the surrounding states, Tennessee sends the smallest share of their travelers to Missouri—only 1% of their outbound travelers.

Missouri's Share of Domestic Travelers by State



Travel Outlook

In a year in which the COVID-19 pandemic has had an unparalleled impact on the frequency and way in which Americans travel, what is the outlook for travel to Missouri?

- Leisure Travel Intent to Missouri & Competitors
- Top Origin Markets for Intent to Visit Missouri

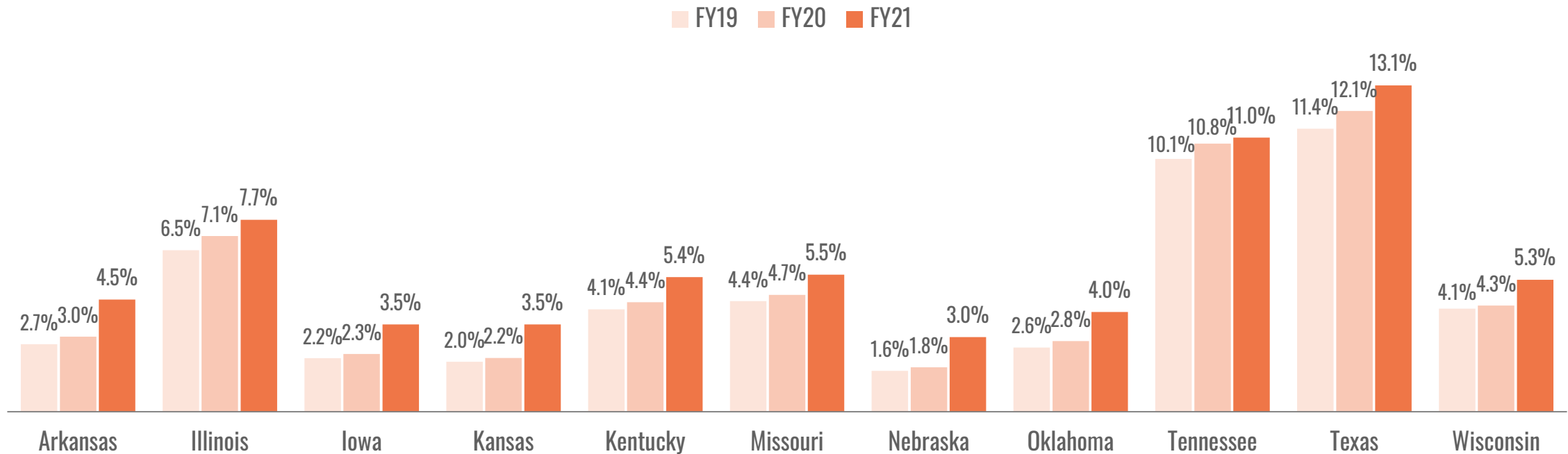


Leisure Travel Intent to Missouri & Competitor States



- Missouri continues to rank 4th among competitor states for leisure trip intent during the next two years, trailing Texas, Tennessee, and Illinois.
- Intent to visit in the next two years is stronger for all these states than it was in FY19 or FY20.

Past Year Travelers Intent to Take Leisure Trip within Next 2 Years to Missouri and Competitor States

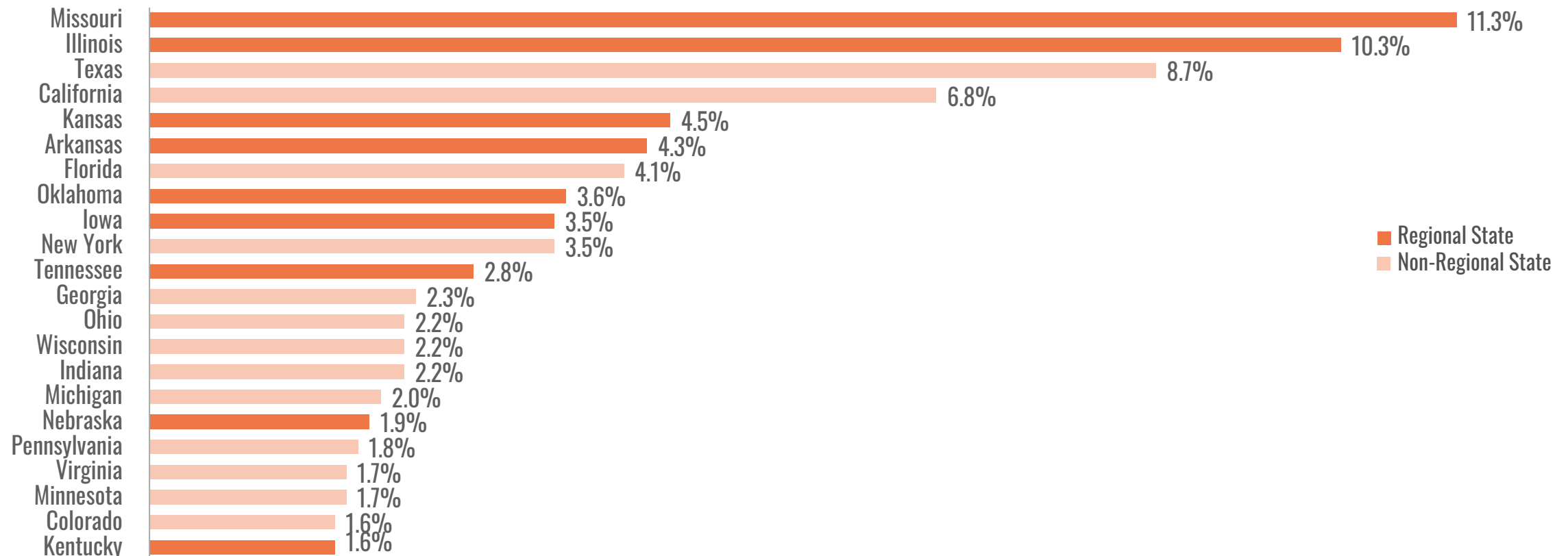


Top Origin Markets for Intent to Visit Missouri



- Regional states represent four out of ten (43.9%) travelers intending to visit Missouri within the next two years.
- However, this is down ten percentage points from FY20's 53.9%, suggesting that more travelers are thinking of traveling further from home over the next two years.

Top Origin Markets for Travelers Intending to Visit Missouri within Next Two Years



Online & Social Media

Use of social media and the internet have vastly changed the way travelers live their lives. Understanding how our visitors utilize digital media and what it means to them can help guide digital marketing planning.

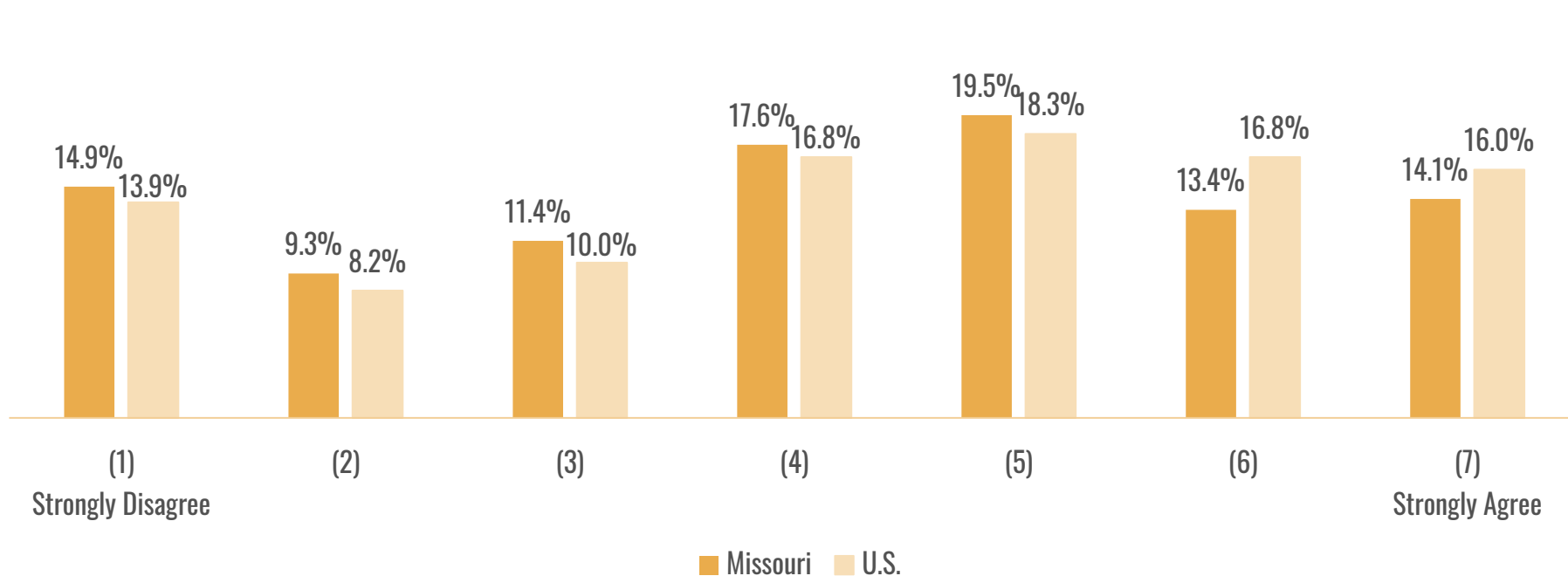
- Time Spent on Social Media
- Social Media for Decision Making
- Trust in Online Forums/Posts
- Expressing Opinions Online



Travelers Time Spent on Social Media

- A larger portion of Missouri and U.S. travelers agree that they spend a lot of time on social media.
- There was a decrease in Missouri travelers who said they spend a lot of time on social media—it went from 35.0% in FY20 to 27.4% in FY21.

I Spend a Lot of Time on Social Media



Top 2 Box (Spend a lot of Time) %

MO FY21: 27.4%

MO FY20: 35.0%

U.S. FY21: 32.8%

U.S. FY20: 34.2%

Bottom 2 Box (Don't Spend a Lot of Time) %

MO FY21: 24.2%

MO FY20: 19.2%

U.S. FY21: 22.1%

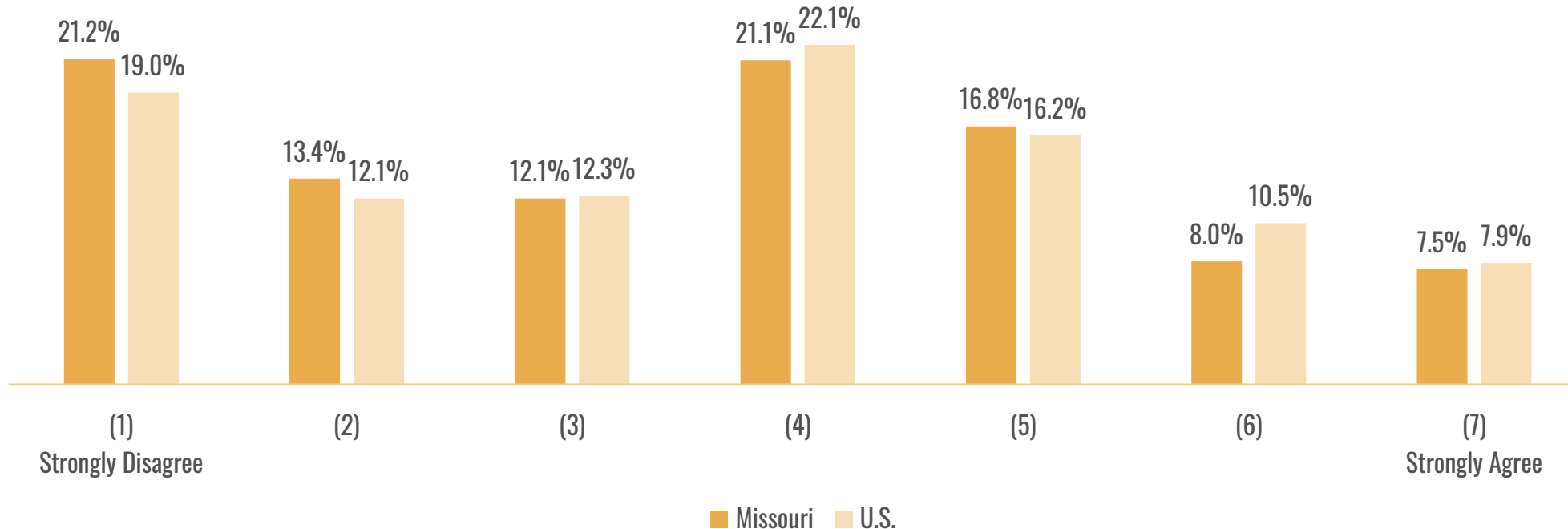
U.S. FY20: 19.8%

Travelers Use of Social Media for Decision Making



- Only 15.5% of Missouri visitors and 18.4% of U.S. visitors prefer to get social media advice when making product and service decisions

Advice from social media is preferred when making product & service decisions



Top 2 Box (Prefer Social Media Advice on Brands) %

MO FY21: 15.5%
U.S. FY21: 18.4%

Bottom 2 Box (Don't Prefer Social Media Advice on Brands) %

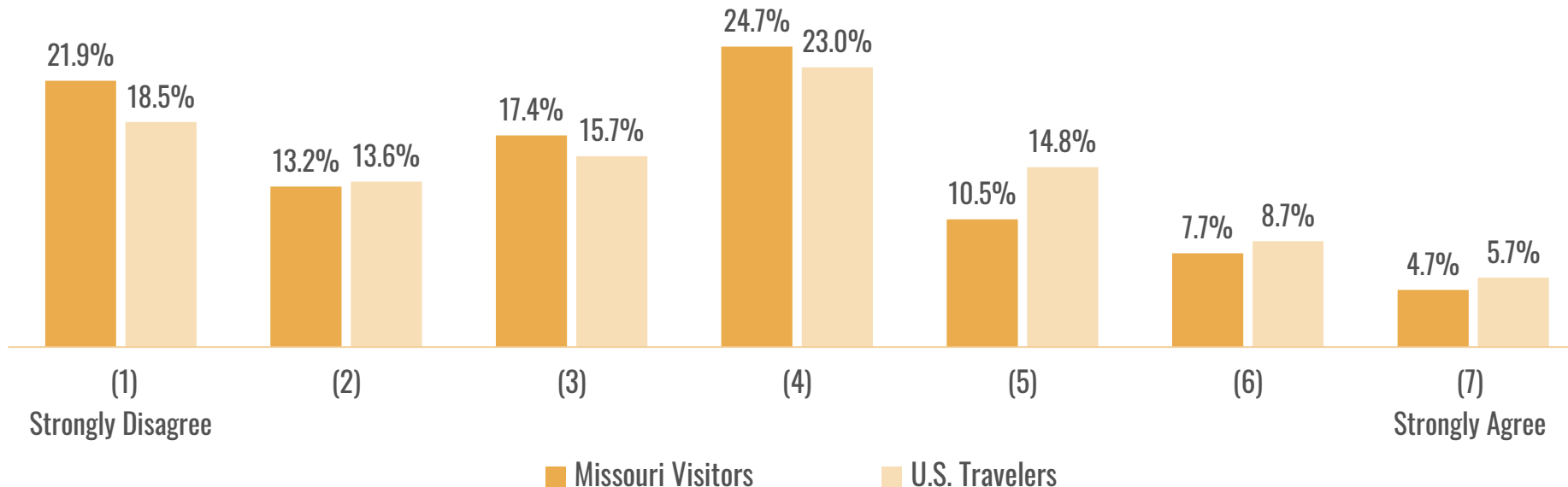
MO FY21: 34.6%
U.S. FY21: 31.1%

Travelers Trust in Online Forums/Posts



- Missouri visitors and overall U.S. travelers don't tend to trust what people say online about brands as much as other sources of brand information.

You Can Trust What People Say Online About Brands More Than Other Sources



Top 2 Box (Can Trust) %

MO FY21: 12.3%

MO FY20: 11.7%

U.S. FY21: 14.4%

U.S. FY20: 13.6%

Bottom 2 Box (Can't Trust) %

MO FY21: 35.2%

MO FY20: 37.3%

U.S. FY21: 32.2%

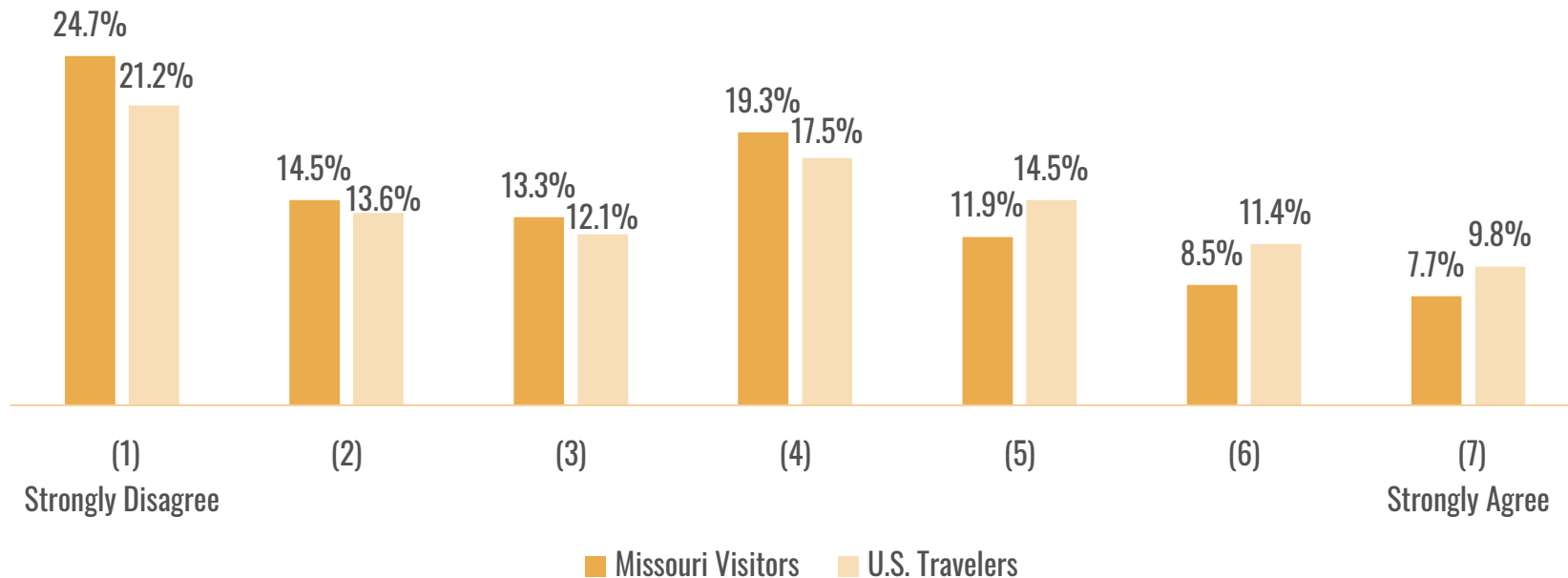
U.S. FY20: 34.8%

Travelers Expressing Brand Opinions Online



- The largest share (39.2%) of Missouri visitors report they don't often express their opinions on brands online.
- Only 16.2% of Missouri visitors report often expressing their opinions of brands online.

I Often Express My Opinion on Brands Online



Top 2 Box (Often Express Brand Opinions Online) %

MO FY21: 16.2%

MO FY20: 15.0%

U.S. FY21: 21.2%

U.S. FY20: 19.1%

Bottom 2 Box (Don't Often Express Brand Opinions Online) %

MO FY21: 39.2%

MO FY20: 34.9%

U.S. FY21: 34.8%

U.S. FY20: 32.7%

Methodologies

- The source for the data utilized in the graphs and descriptions in this report is provided by the Omnitrak Group's premier traveler database project "TravelTrakAmerica." Omnitrak Group is a new vendor this year for the Missouri Division of Tourism, having licensed the TravelsAmerica product from TNS in 2018 and are rebranding this data product as "TravelTrakAmerica." They employ the Prodege, LLC online panel which currently includes over 54 million households in the U.S. and 120 million worldwide. This managed panel employs usage monitoring to ensure that clients do not receive responses that are biased. Further, Prodege, LLC is constantly recruiting new panel members and strives to have a panel of both economic and social diversity.
- For TravelTrak America, more than 21,000 surveys are deployed to the panel each month requesting information of travelers from across the United States. The established definition of a traveler is that they traveled 50 miles from home, one-way, and/or stayed overnight to a destination that is outside their normal routine. The data provided by Omnitrak delivers valuable insights into who is traveling to and within Missouri, what they are doing while they are here, trip planning, and spending. Further, there is traveler information about Missouri's competitor states.