

MISSOURI VISITOR PROFILE & TRIP INSIGHTS

FY 2022



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?

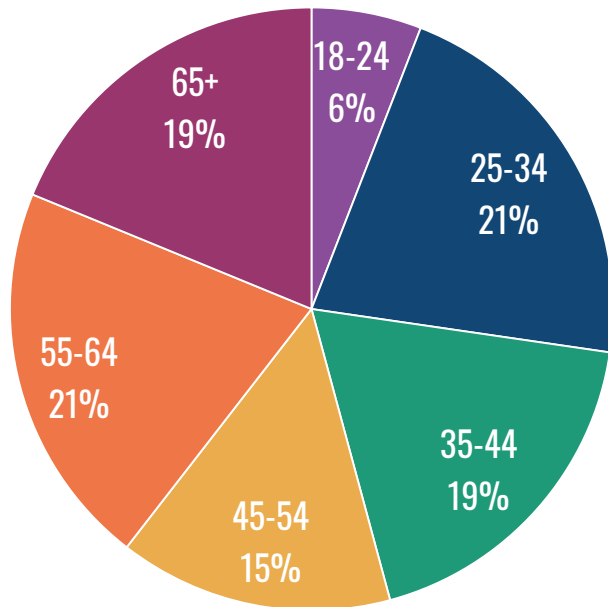
- Age
- Marital Status
- Household Income
- Education
- Ethnicity
- Hispanic Origin



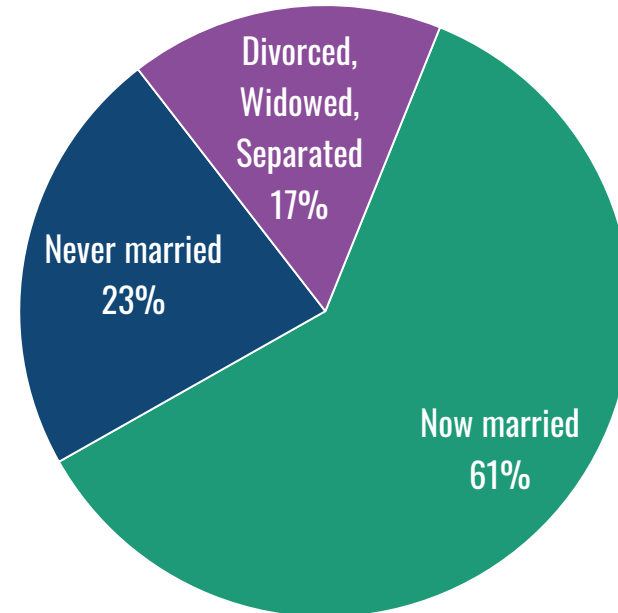
Age & Marital Status

- More than half of Missouri visitors were in MDT's target market age range of 25 - 54 years old (55%). The average age of Missouri adult visitors was 47.5, slightly older than FY2021's average age of 47.3.
- Sixty-one percent of visitors to the Show-Me State were currently married, down from 65% in FY2021.

Age Distribution of Missouri Visitors



Marital Status of Missouri Visitors

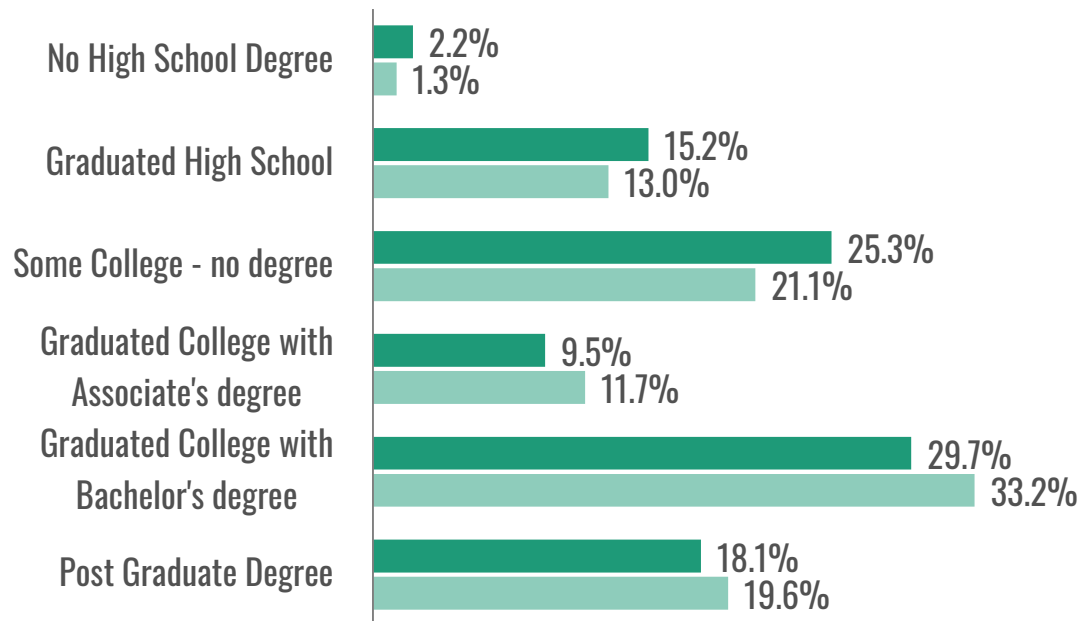


Education & Income



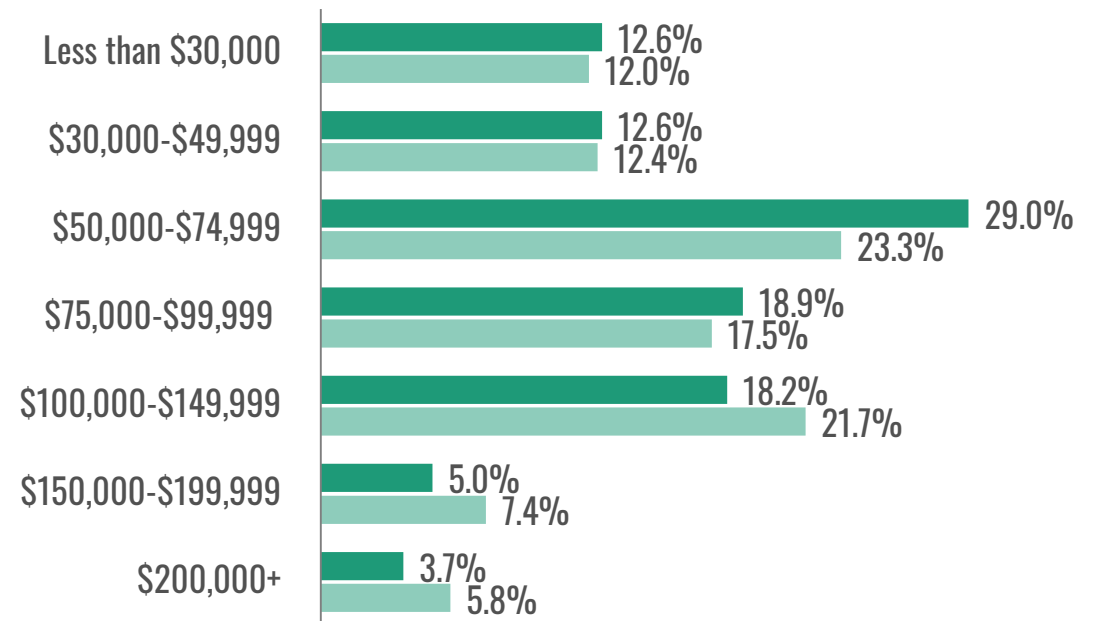
- Just under half (48%) of Missouri visitors have a bachelor's or graduate degree.
- The largest share (29.0%) of Missouri visitors had a household income of \$50,000 - \$74,999
- A little over one quarter (26.9%) of travelers visiting Missouri had a household income of \$100,000 or more.

Education



■ Missouri Visitors ■ U.S. Domestic Travelers

Annual Household Income

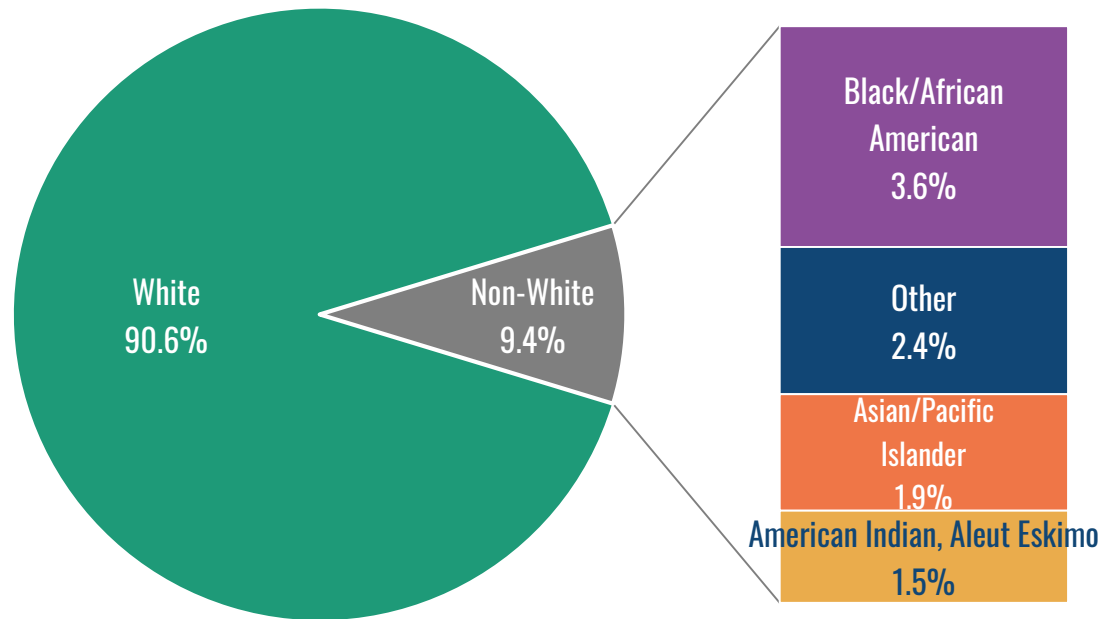


■ Missouri Visitors ■ U.S. Domestic Travelers

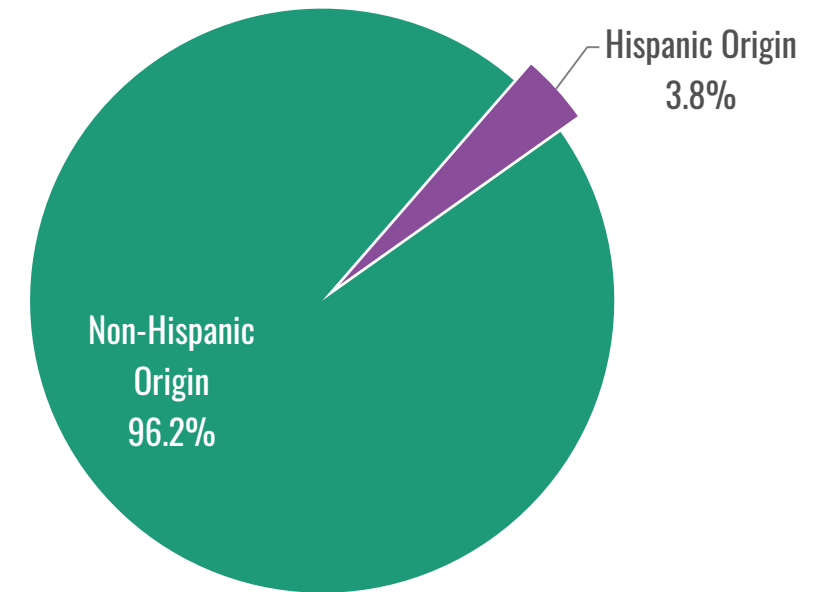
Ethnicity & Hispanic Origin

- Most Missouri visitors identify as White (90.6%), compared to 82.8% of U.S. domestic travelers (not shown).
- More than nine in ten Missouri visitors identify as non-Hispanic (96.2%). The portion of Missouri visitors who identified as Hispanic was smaller than that of U.S. domestic travelers (not shown) at 3.8% and 8.7%, 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?

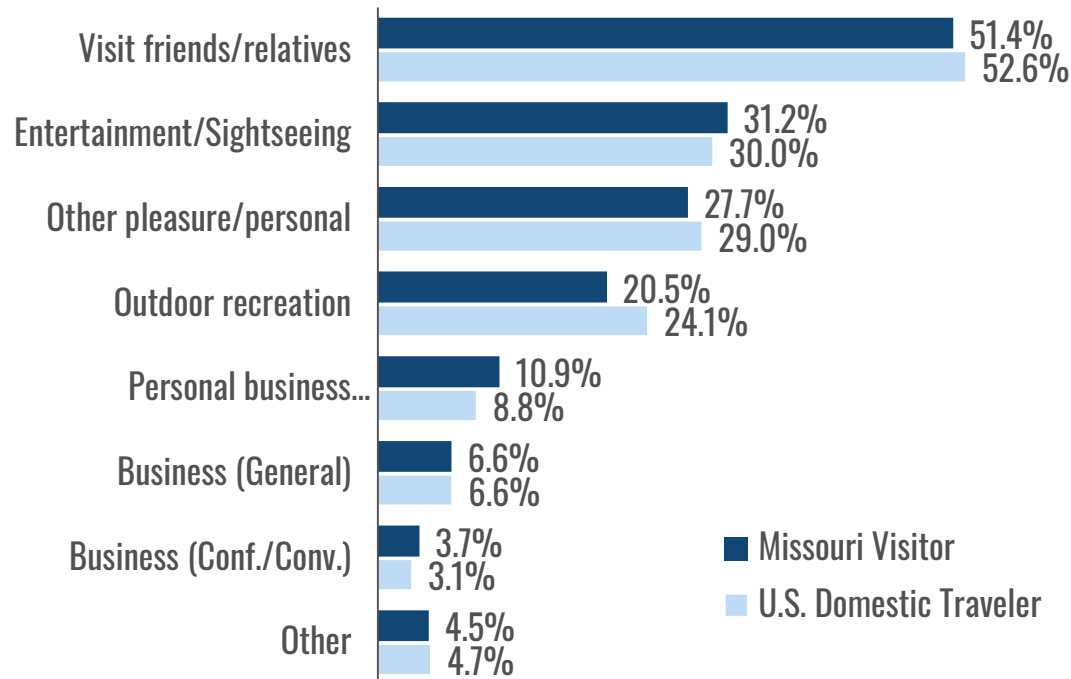
- Trip Type
- Repeat Visitation
- Trip Purpose
- Travel Party
- Transportation
- Accommodations
- Activities
- Seasonality
- Missouri Destinations



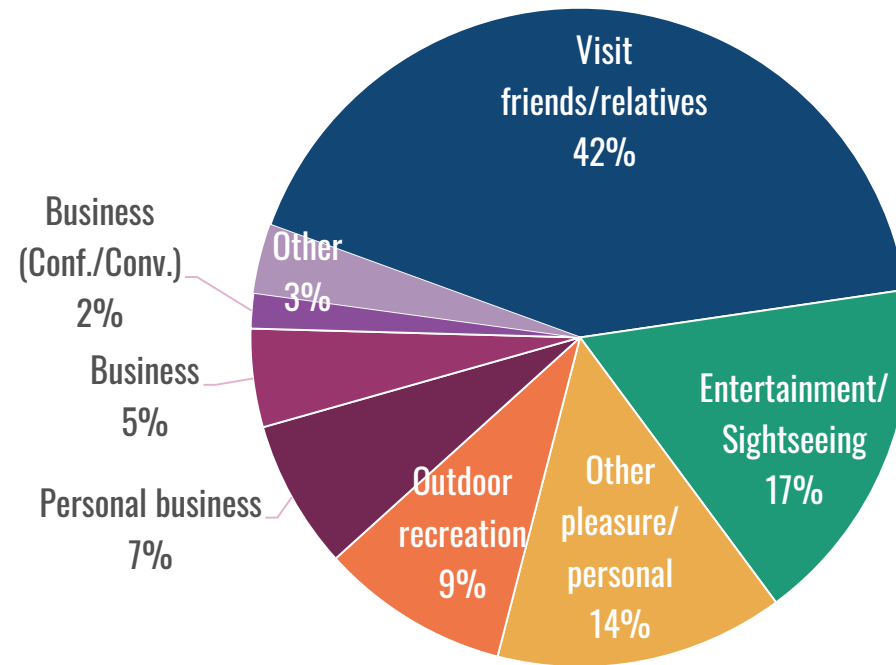
Trip Purpose

- Leisure travel dominates Missouri's tourism industry, with 88.8% 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 31.2% reported traveling for entertainment/sightseeing.
- Of those primarily traveling for business, 39.5% reported extending their stay for leisure, down from 48.5% in FY21.

All Trip Purposes

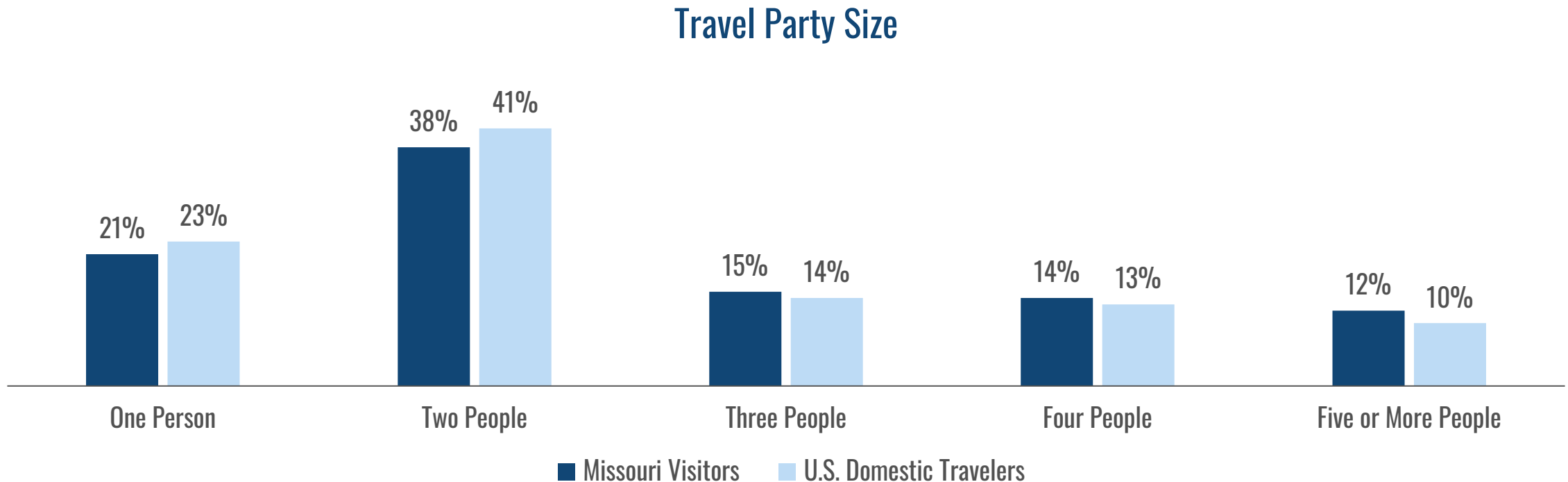


Missouri Visitors Primary Trip Purpose



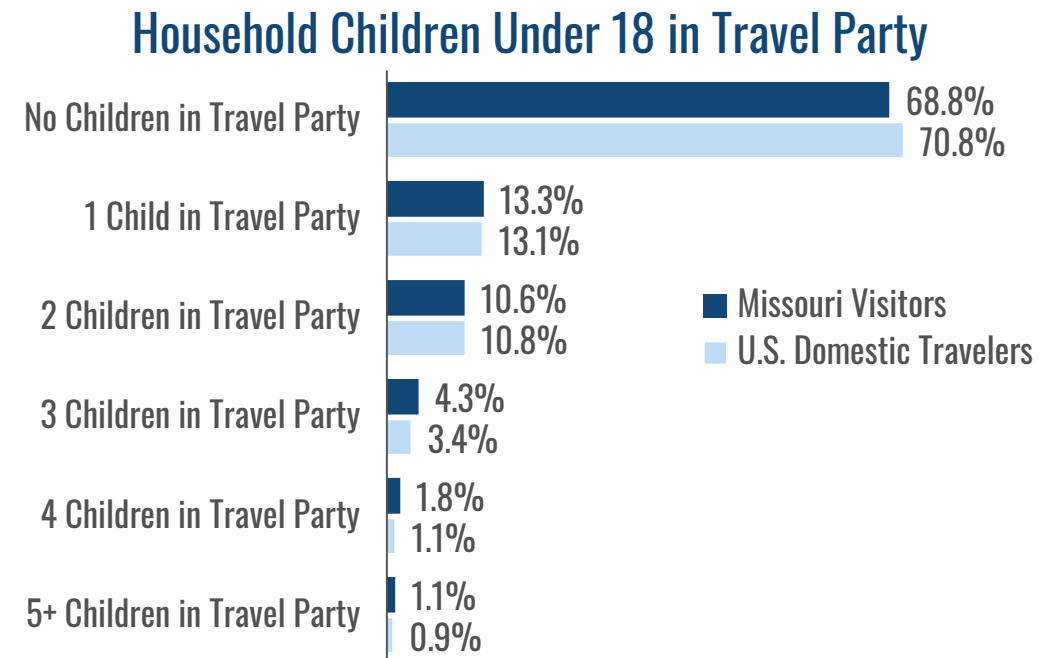
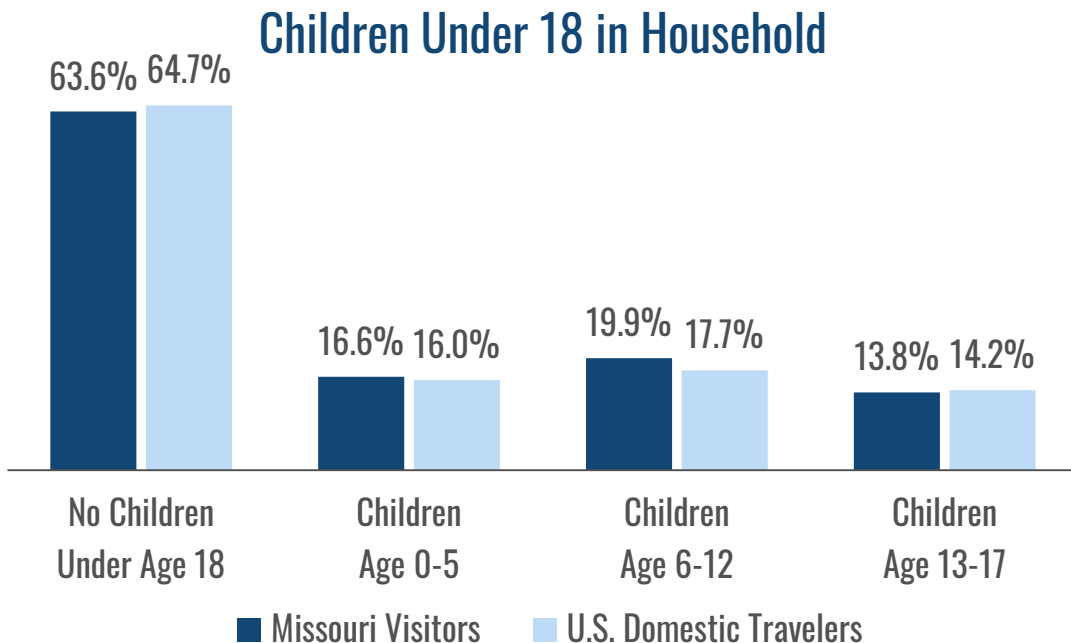
Travel Party Size

- Most travel parties have two or more people in them--38% had two people traveling together and another 41% had three or more people in the travel party
- Average travel party size of Missouri visitors is 2.7.



Children in Household & Travel Party

- Although 36.5% of Missouri visitors have children under 18 in their household, only 31.2% brought their children on their trip.
- This percentage is an increase over the previous fiscal year when 27.7% of Missouri visitors reported traveling with children from their household.



Top Visitor Activities

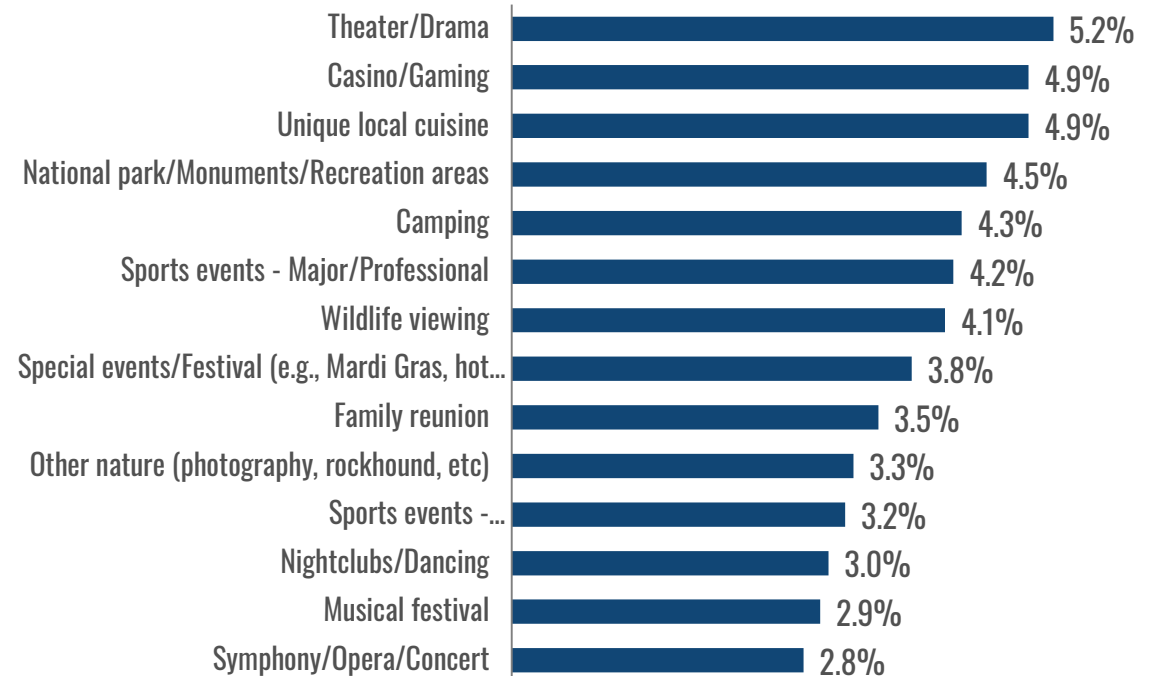


- Missouri visitors reported their top activities while visiting the state are visiting friends/relatives (36.5%), shopping (23.4%), and rural sightseeing (11.9%).
- Other top activities include historic sites (10.4%), museums (9.3%), fine dining (8.8%), and urban sightseeing (7.4%).

Top Traveler Activities within Missouri



Top Traveler Activities within Missouri (con.)



All Visitor Activities in Missouri



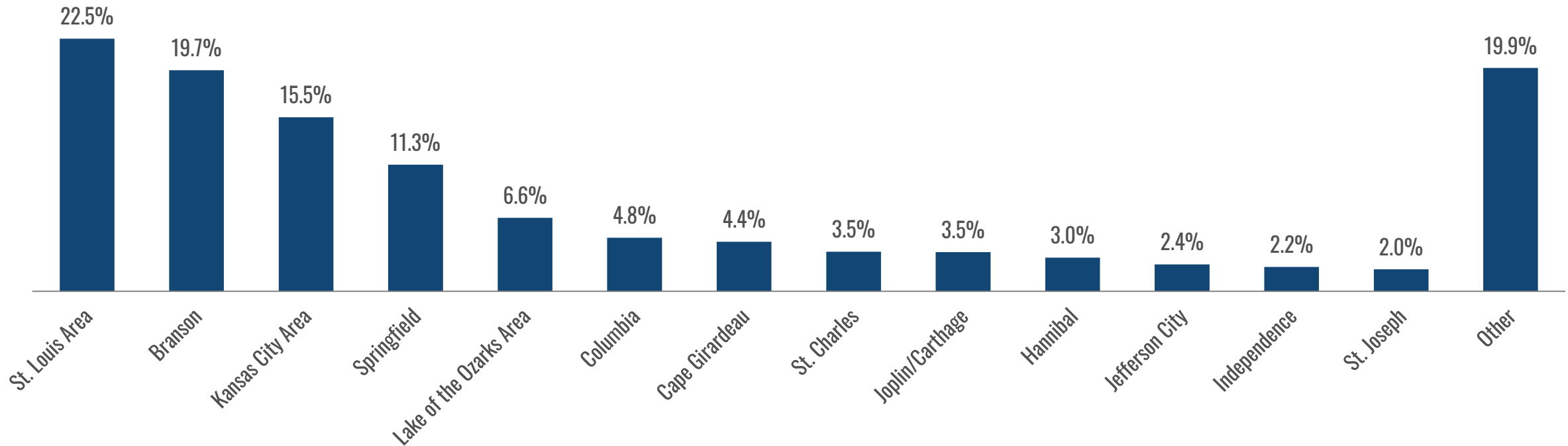
Visiting friends/relatives	36.5%	Camping	4.3%	Bird Watching	1.9%
Shopping	23.4%	Sports events - Major/Professional	4.2%	Nature travel/Ecotouring	1.8%
Rural sightseeing	11.9%	Wildlife viewing	4.1%	Native American ruins/Rock art	1.8%
Historic sites	10.4%	Special events/Festival (e.g., Mardi Gras, hot air balloon races)	3.8%	Mountain biking	1.6%
Museums	9.3%	Family reunion	3.5%	Biking/Road biking/Cycling	1.5%
Fine dining	8.8%	Other nature (photography, rockhound, etc.)	3.3%	Farms/ranches/Agri-tours	1.5%
Urban sightseeing	7.4%	Sports events - Youth/Amateur/Collegiate/Other (<i>spectator</i>)	3.2%	Beach	1.4%
Theme park/Amusement park/Water park	7.2%	Nightclubs/Dancing	3.0%	Sailing	1.2%
Local/folk arts/crafts	6.8%	Musical festival	2.9%	Skiing/snowboarding/other snow activities	1.2%
Zoos/Aquariums/Aviaries	6.8%	Symphony/Opera/Concert	2.8%	Spa/health club	1.2%
Swimming	6.6%	Gardens	2.5%	Water skiing	1.2%
Hiking/Backpacking/Canyoneering	6.4%	Motor boat/Jet ski	2.5%	Area where a TV or movie was filmed	1.1%
State park/Monuments/Recreation areas	6.4%	Art Galleries	2.5%	Scuba diving/Snorkeling	0.9%
Fishing	6.1%	Ocean/River cruise	2.5%	Whitewater rafting	0.7%
Craft breweries	5.8%	ATV/Four-wheeling	2.4%	Hang gliding/Skydiving/Base jumping	0.6%
Theater/Drama	5.2%	Golf	2.2%	Horseback riding	0.6%
Casino/Gaming	4.9%	Sports events - Youth/Amateur/Collegiate/Other (<i>participant</i>)	2.2%	Rock/Mountain climbing	0.4%
Unique local cuisine	4.9%	Kayaking/Canoeing/Paddleboarding	2.1%	Motor sports-NASCAR/Indy	0.2%
National park/Monuments/Recreation areas	4.5%	Wine tasting/Winery tour	2.0%	Windsurfing/Kiteboarding	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

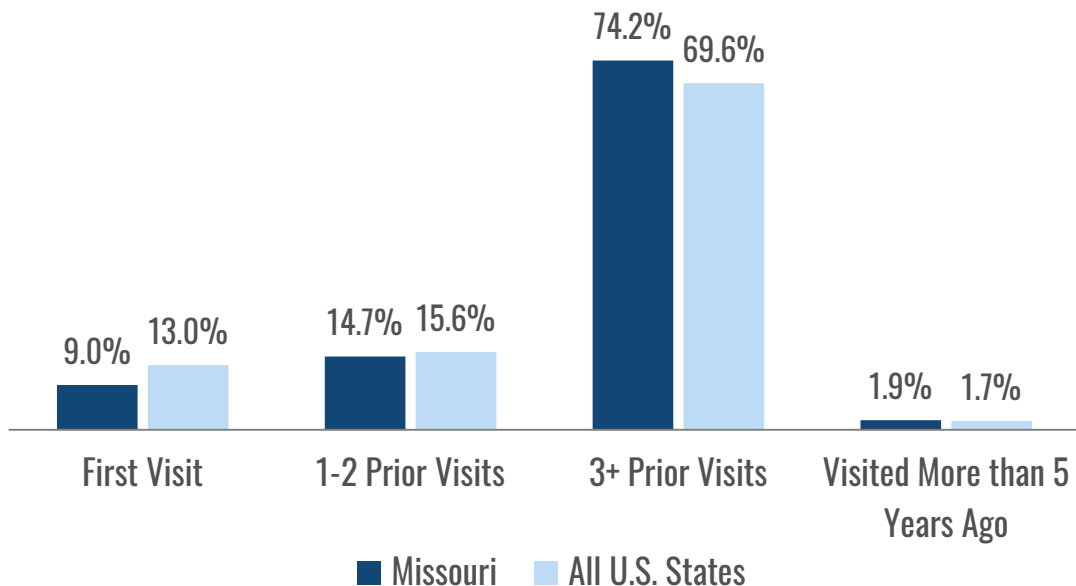


Note: This data reflects two years of combined TravelTrakAmerica data to generate a larger sample.

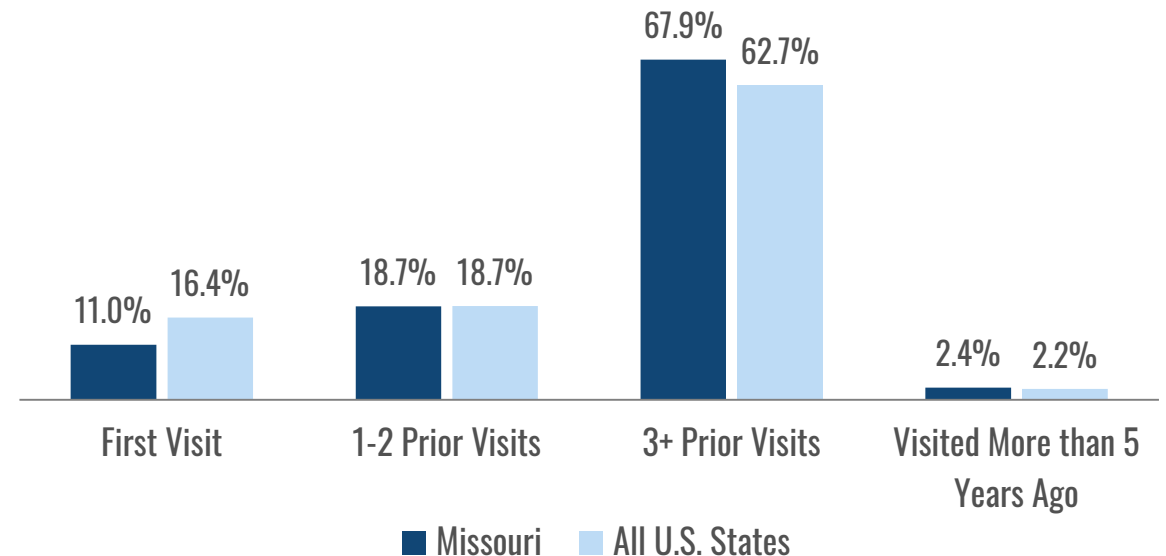
Repeat Overnight Visitation

- Nearly three out of four visitors (74.2%) 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—11.0% of out-of-state visitors came to MO for the first time in FY2022 compared to 16.4% of visitors to all states being first timers.

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



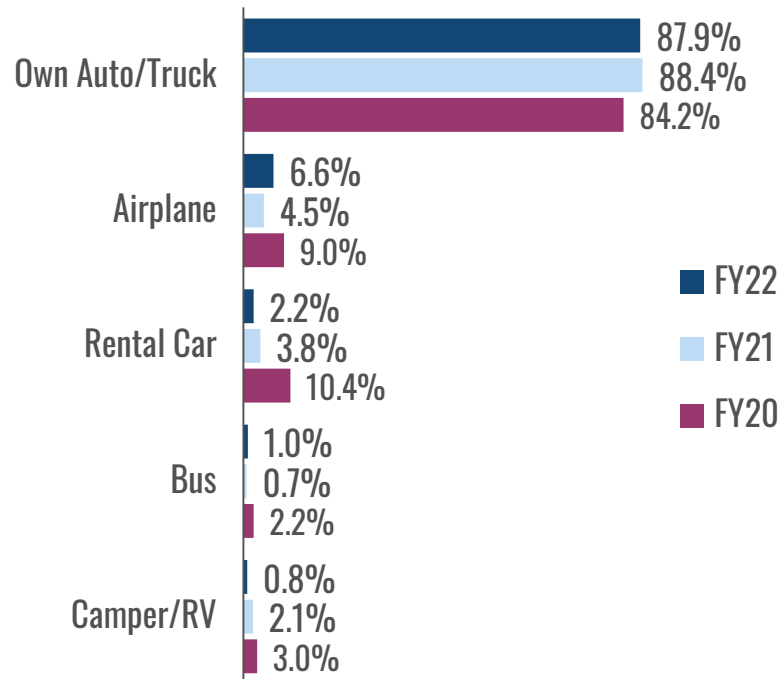
First vs Repeat Out-of-State Overnight Visits to State(s) Past Five Years



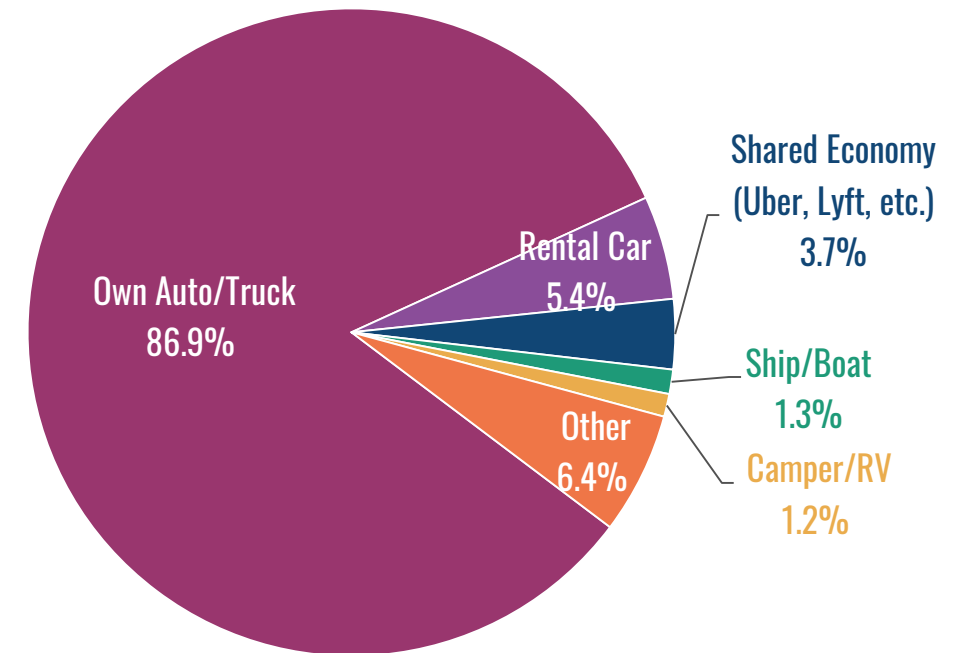
Transportation Modes

- Most visitors (86.9%) use their own vehicle as their transportation within Missouri. In comparison, 76.9% of all U.S. travelers use their own vehicle to travel within their vacation destination.
- Only 6.6% of visitors traveled by air to get to Missouri, an increase from FY21's 4.5% but still not up to FY20's 10.4%.

Top Transportation Modes To Missouri



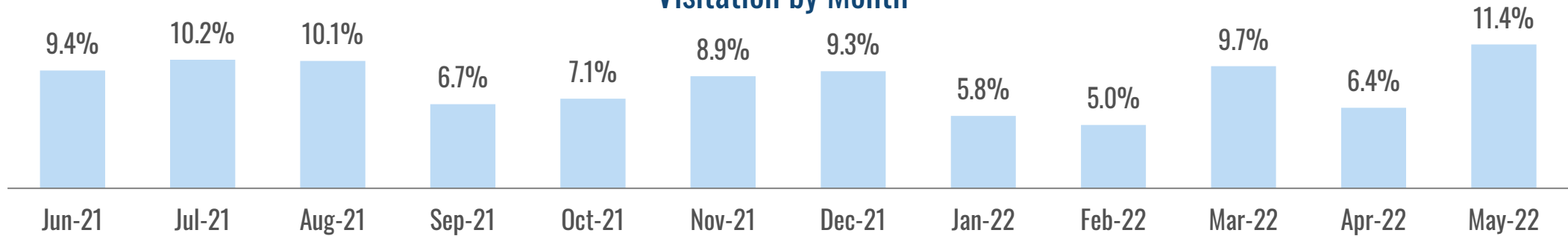
Transportation Mode Within Missouri



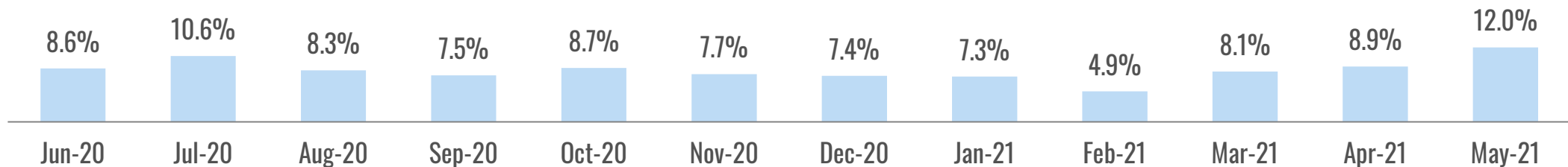
Monthly Shares of Visitation

- May 2022 was the busiest month for visitors during this timeframe, with 11.4% of visitors visiting in that month.

Visitation by Month



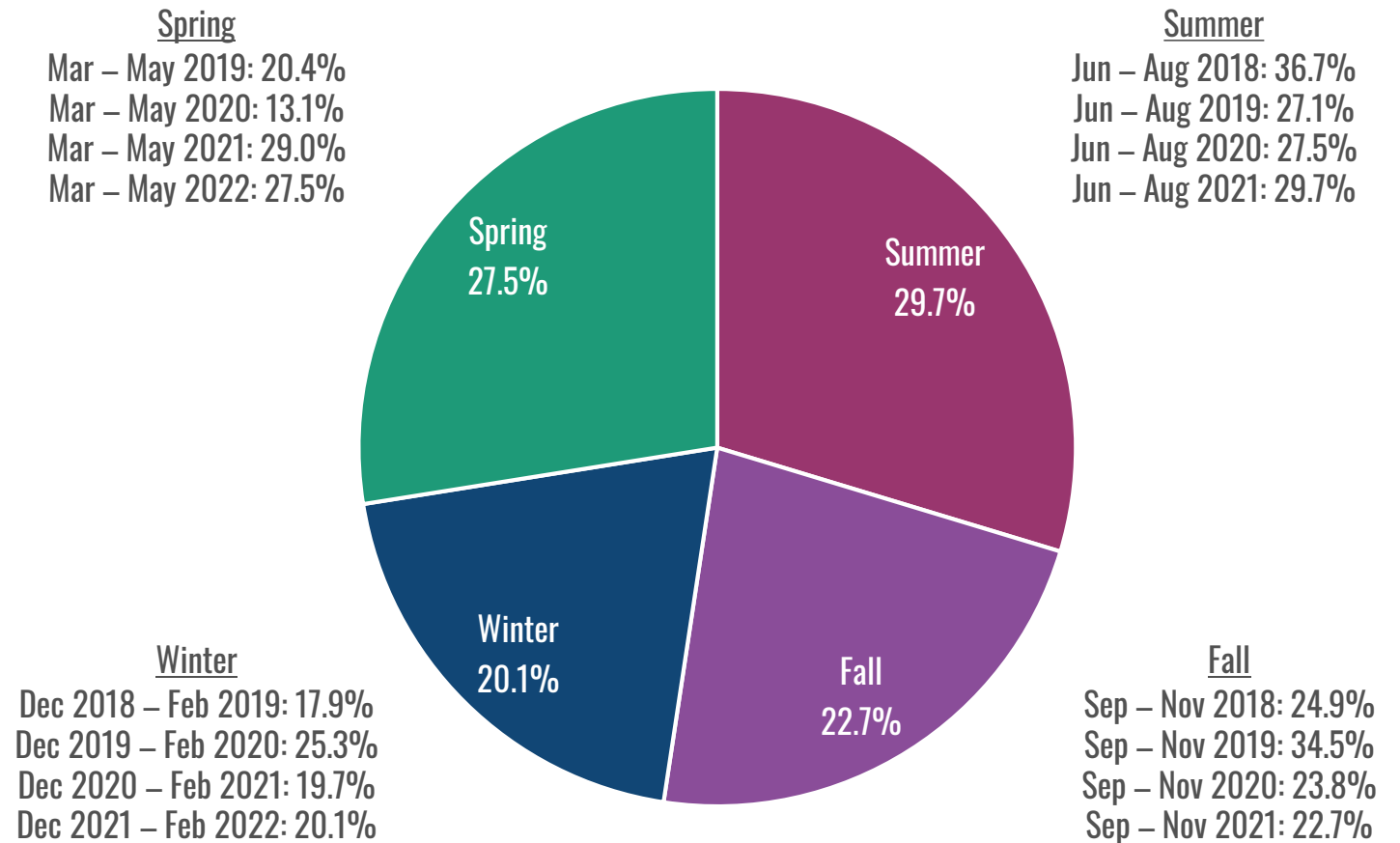
Visitation by Month for Prior 12 Months



Seasonality of Missouri Tourism

- Visitation in the Summer of 2021 increased by 2.2 percentage points over the prior year with 29.7% of the year's visitors compared to 27.5% of visitors during the Summer of 2020.
- Spring 2022's share of visitation was lower by 1.5 percentage points compared to Spring 2021's visitation.

Visitation by Season

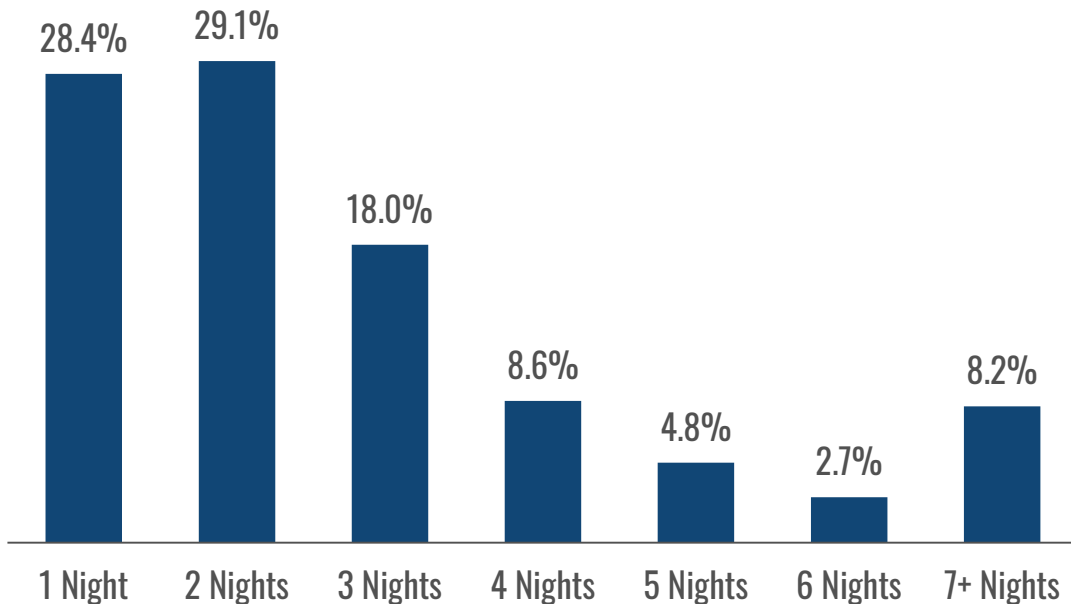


Missouri Nights Spent & Accommodations Used

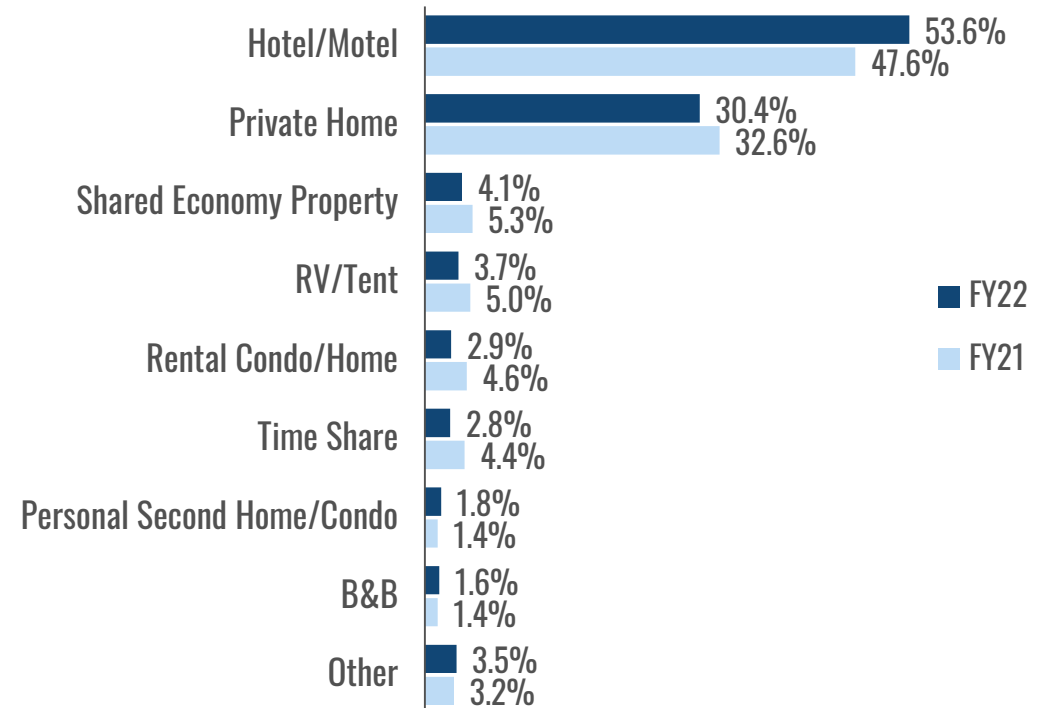


- Overnight visitors stayed an average of 3.0 nights in Missouri, a decrease from last year's 3.3 nights with 71.6% staying at least 2 nights.
- The proportion of nights spent in a Missouri hotel/motel increased in FY22, while nights in private homes decreased.

Overnight Visitors Length of Stay in Missouri
(Average = 3.0 Nights)



Proportion of Nights in Missouri Accommodation Types



Attitudes Toward Travel and How Vacations are Planned

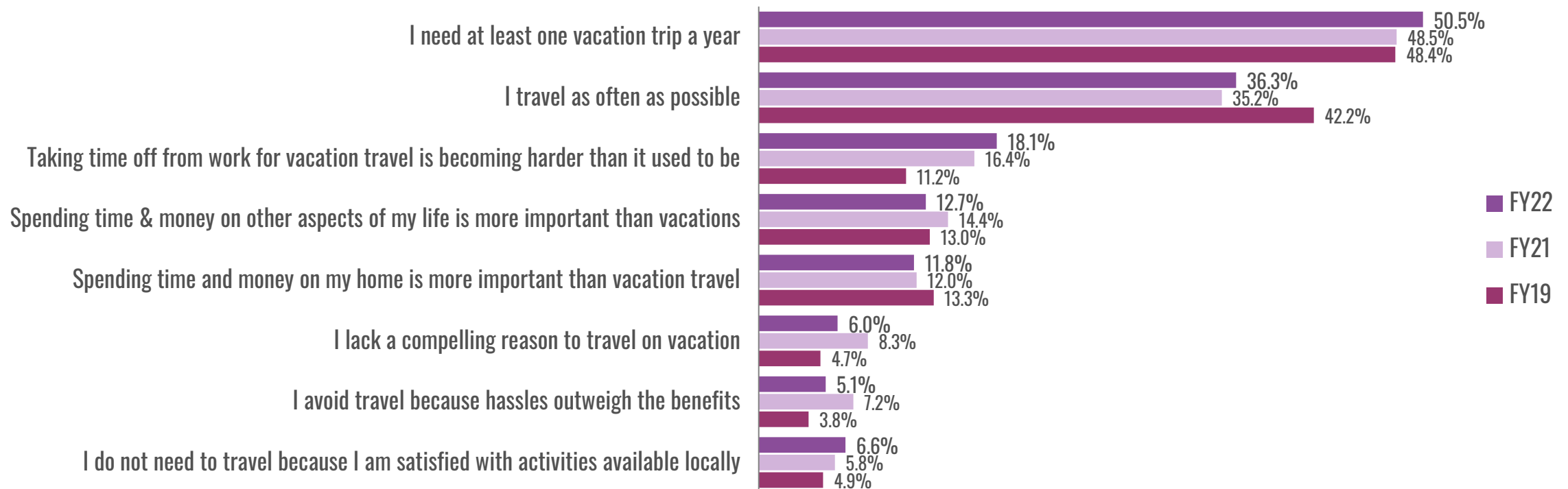
How do our Missouri visitors feel about the need to take a vacation? When are decisions made to travel? What resources do they use to plan their trips? Are they using their earned vacation days?

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

Attitudes Towards Vacations

- Just over half of Missouri visitors (50.5%) feel a need to take at least one vacation a year.
- Meanwhile, over a third of Missouri visitors (36.3%) seek to travel as often as possible. This is several percentage points less than the 42.2% that said this in FY19.
- The percentage who say that taking time off work for vacations is becoming harder increased from 11.2% in FY19 to 18.1% in FY22.

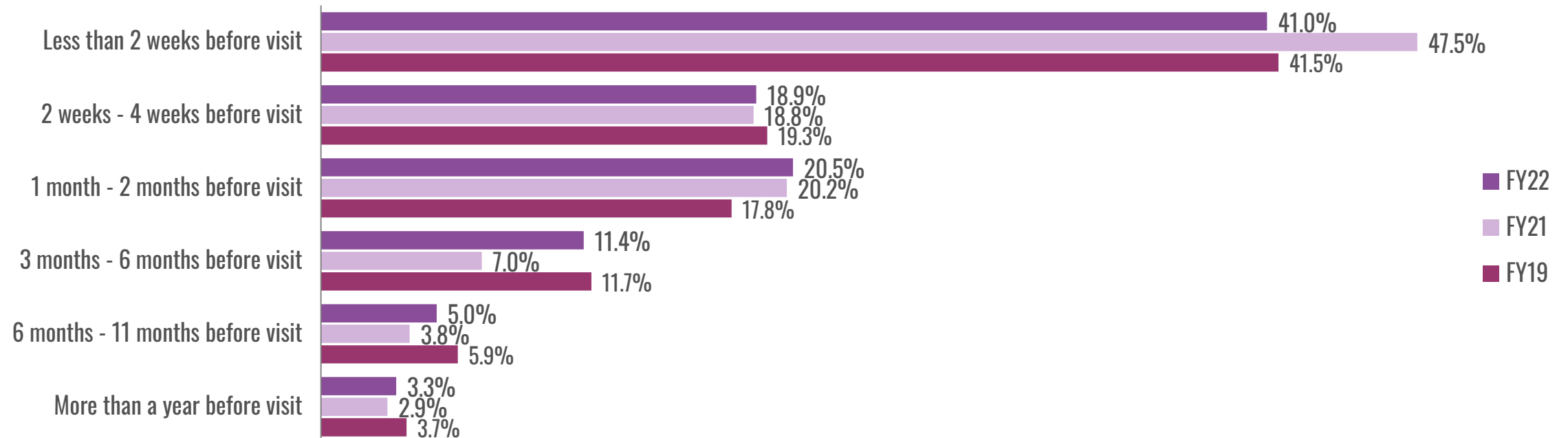
Attitudes Towards Vacation Travel



Travel Decision Timing

- Four out of ten (41%) visitors to Missouri decided to take the trip less than two weeks before the trip.
- The trip decision timeframe shortened in FY20 and FY21 but returned to timeframes similar to FY19 in FY22.

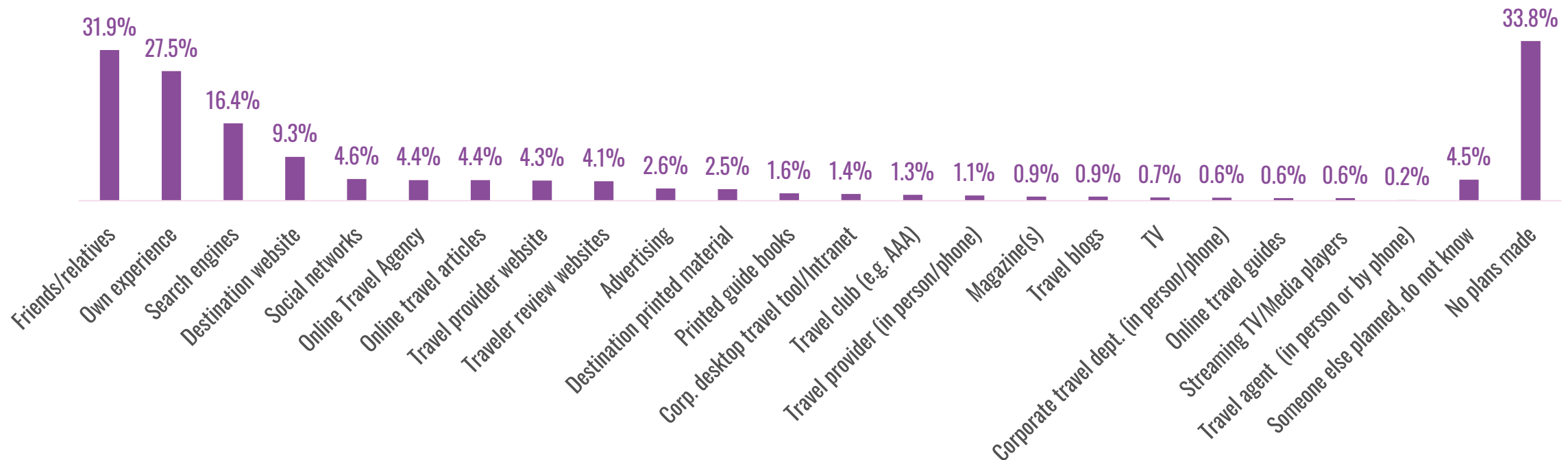
Advance Decision to Visit



Trip Planning Sources

- Missouri visitors use various sources to plan travel with the largest shares using advice from friends/relatives (31.9%) or their own experience (27.5%). This is a change from recent years when travelers' own experience was the top planning source.
- Search engines are the third most used planning source of information, used by 16.4% 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?

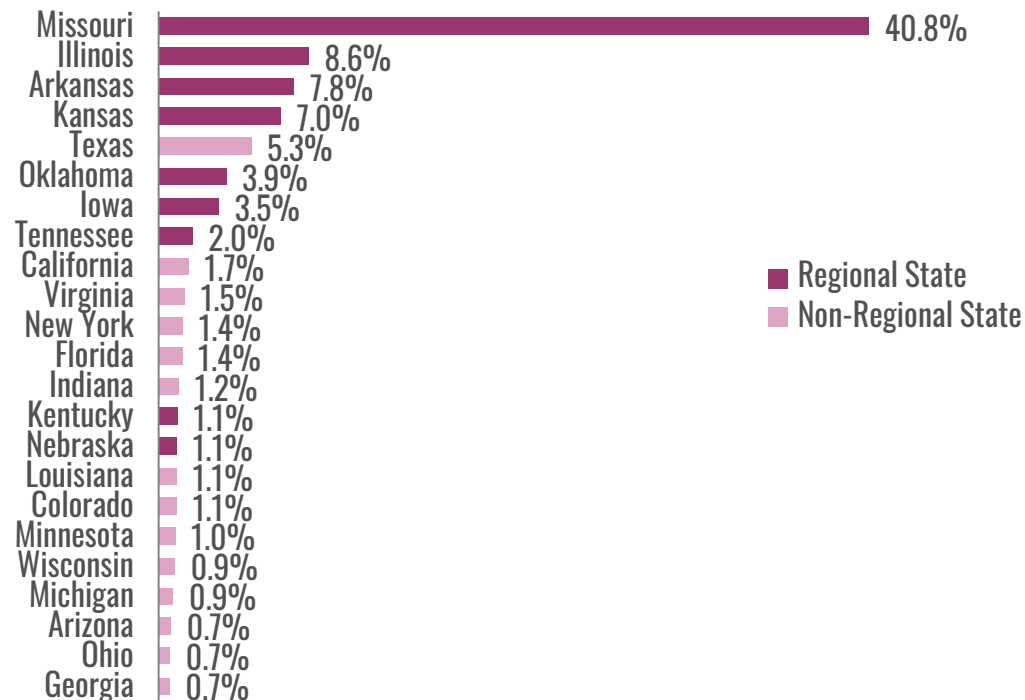
- Source Markets
- U.S. Market Share by State
- Map of Top Missouri Source Markets
- Missouri's Market Share

Missouri Source Markets

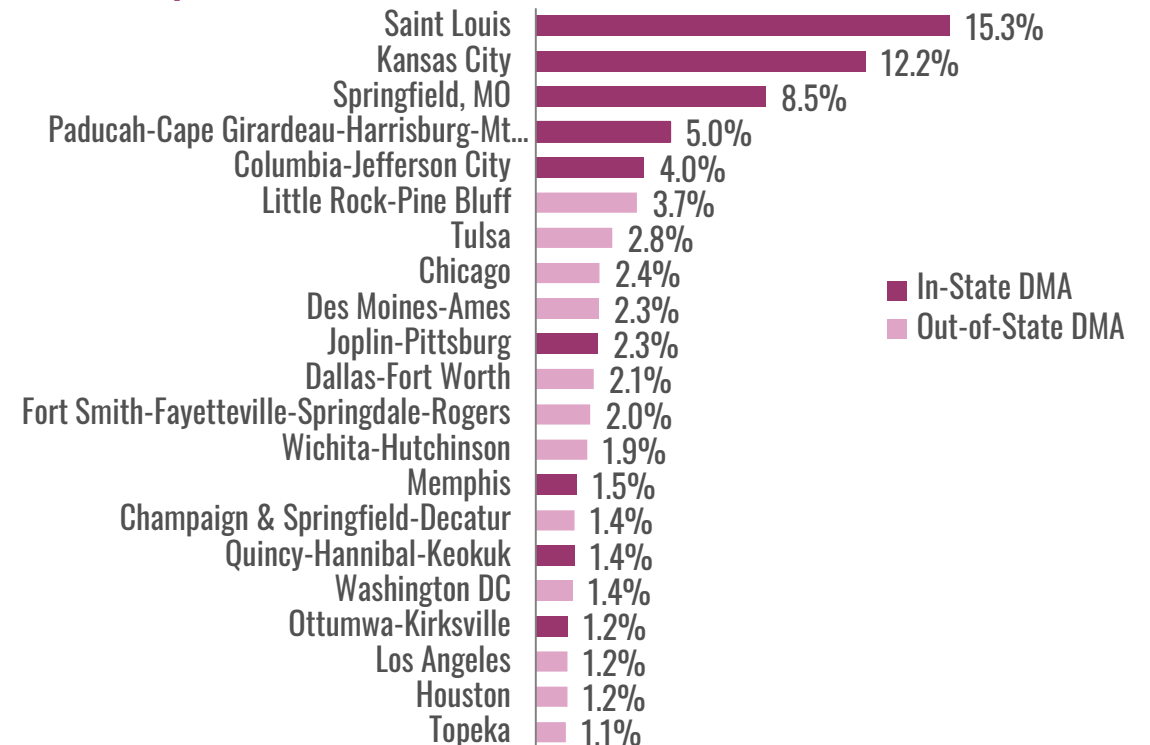


- Missouri tourism is mostly regional with 40.8% of all visitors residing within Missouri and 35.0% living in a neighbor state.
- In-state Designated Marketing Areas (DMA) provide Missouri's tourism industry with the most visitors, particularly larger metro areas.

Top State Source Markets for Missouri Visitors



Top DMA Source Markets for Missouri Visitors



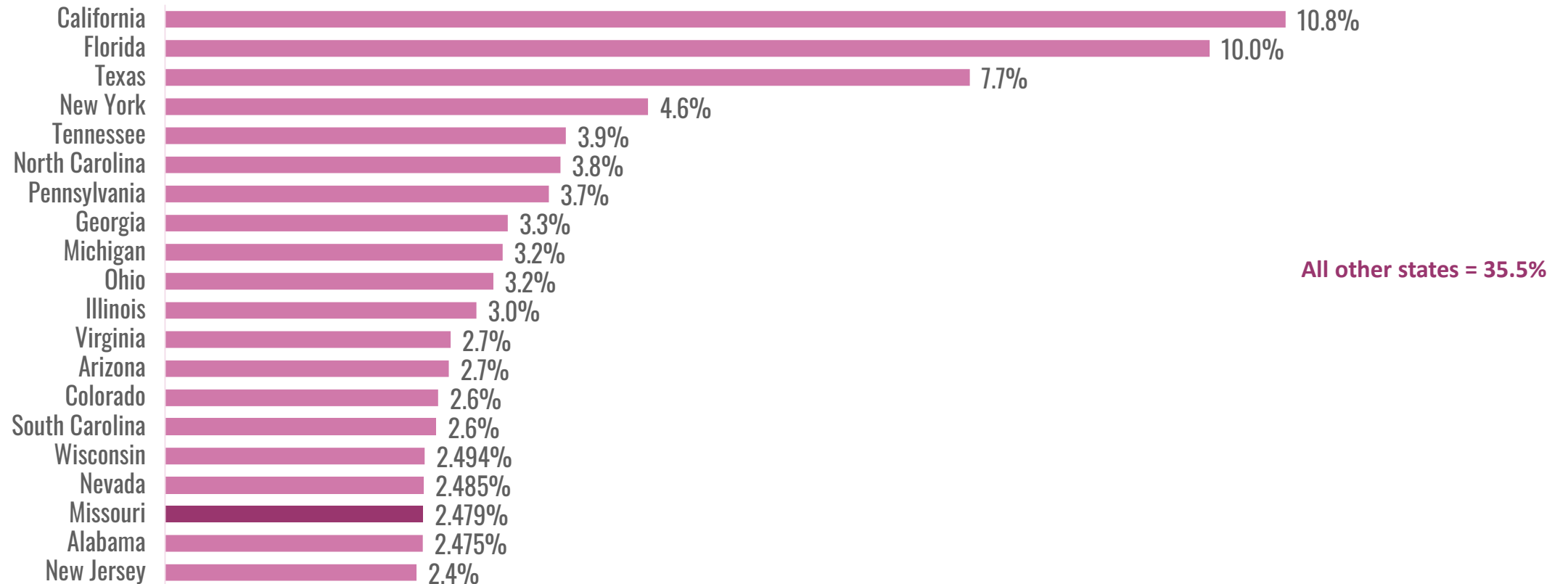
Note: This data reflects two years of combined TravelTrakAmerica data to generate a larger sample.

U.S. Market Shares by State



- Missouri captured 2.5% of all U.S. domestic visitors in FY 2022, slipping down to rank No. 18 from No. 17 in FY 2021.
- South Carolina moved ahead of Missouri in the ranking compared to FY 2021.

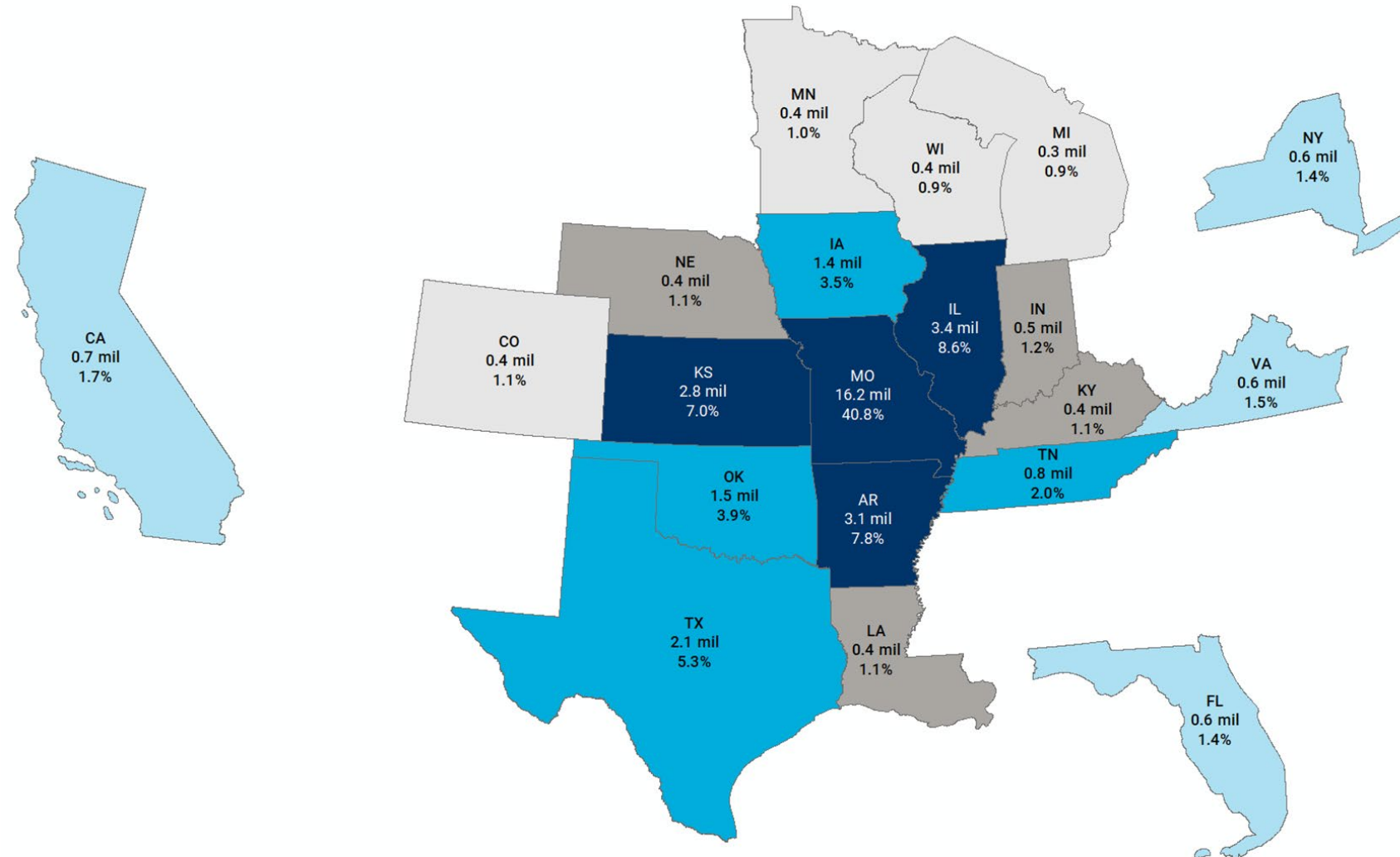
Top 20 States for Market Share of U.S. Domestic Visits



Note: This data reflects two years of combined TravelTrakAmerica data to generate a larger sample.

Map of Missouri Source Markets

Visitation by State



Missouri Source Markets by Shares

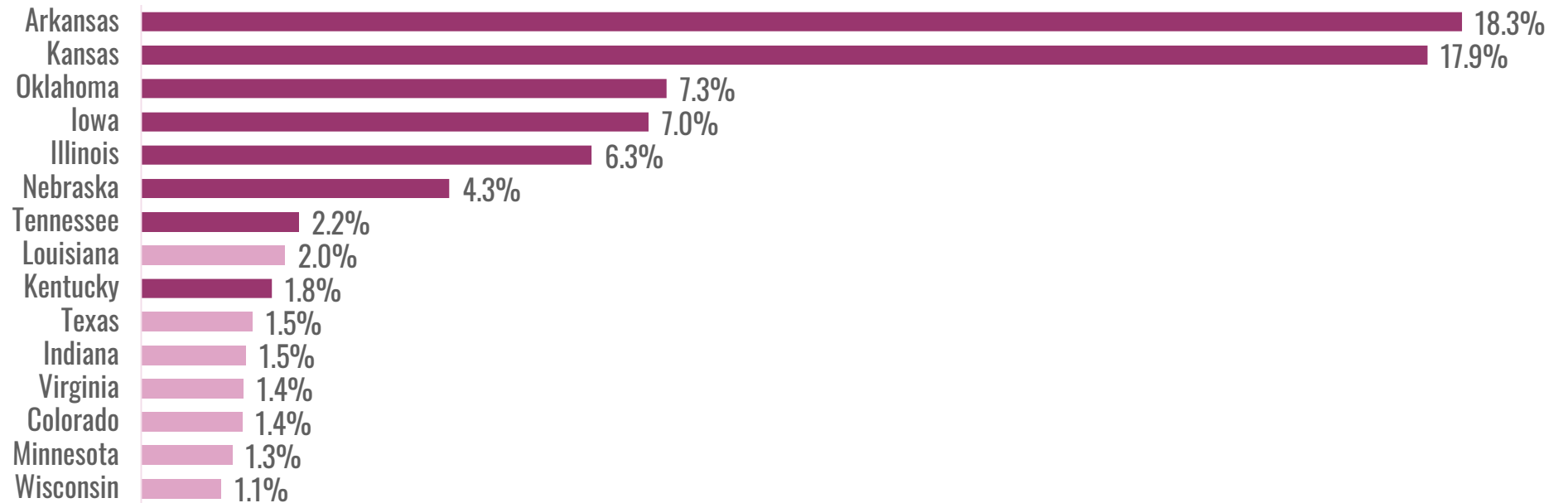
- Less than 1.06%
- 1.07% to 1.19%
- 1.20% to 1.74%
- 1.75% to 5.35%
- 5.36% or more

Missouri's Market Share



- Missouri captured 18.3% of Arkansas outbound travelers, while capturing 17.9% of Kansas travelers and 7.3% of Oklahoma travelers.
- Of the surrounding states, Kentucky sends the smallest share of their travelers to Missouri—only 1.8% of their outbound travelers.
- Missouri residents took 50.4% of all of their domestic trips in Missouri.

Missouri's Share of Domestic Travelers by State



Note: This data reflects two years of combined TravelTrakAmerica data to generate a larger sample.

Travel Outlook

As the economy continues to recover from the impact of the COVID-19 pandemic, what is the outlook for travel to Missouri?

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

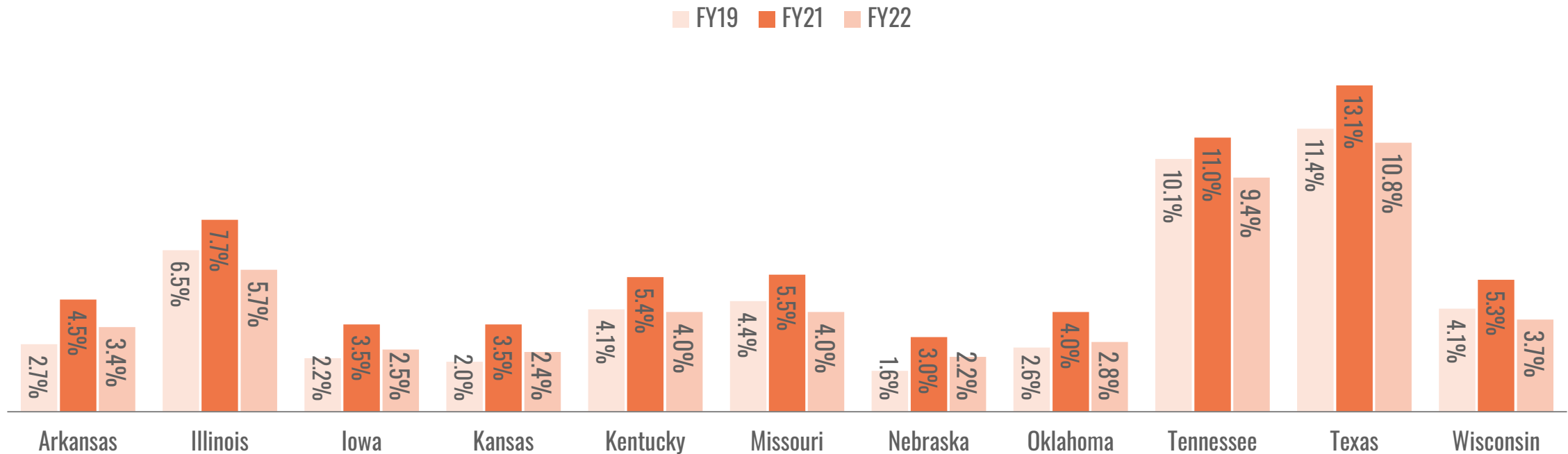


Leisure Travel Intent to Missouri & Competitor States



- Missouri continues to rank 4th (tied with Kentucky) 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 lower for all these states than it was in FY21.

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

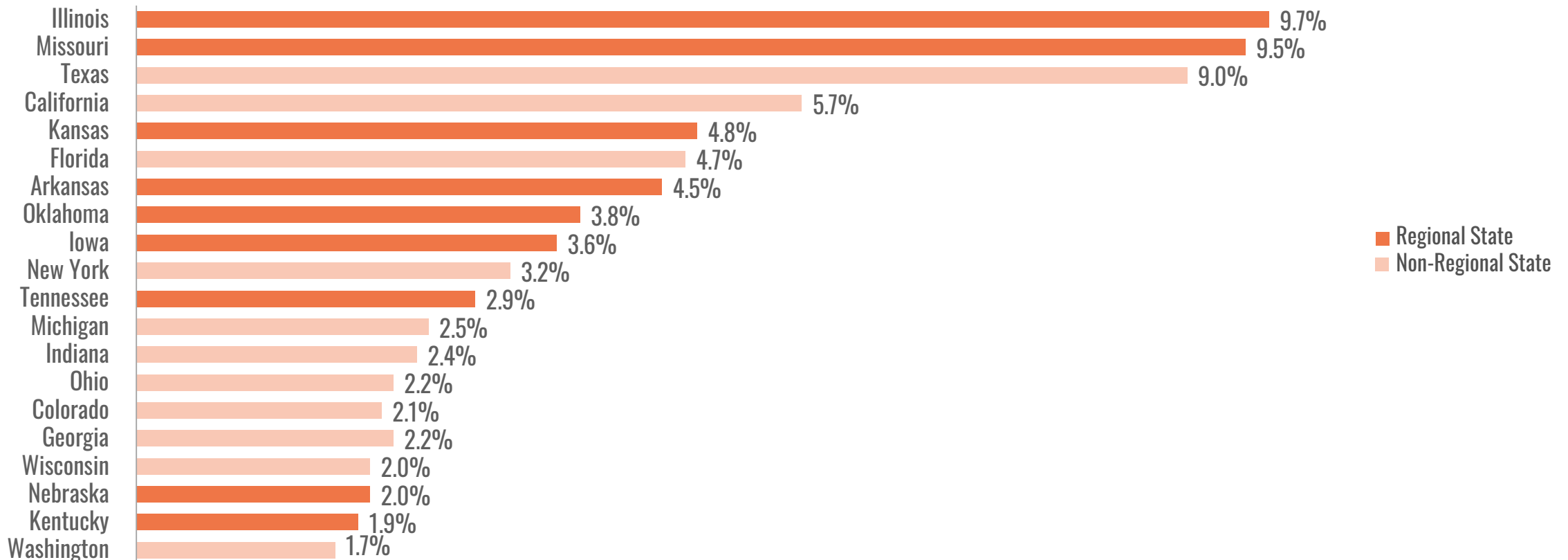


Top Origin Markets for Intent to Visit Missouri



- Regional states represent four out of ten (43.9%) travelers intending to visit Missouri within the next two years.
- Travelers from Illinois surpassed travelers from Missouri for intent to visit Missouri in 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.

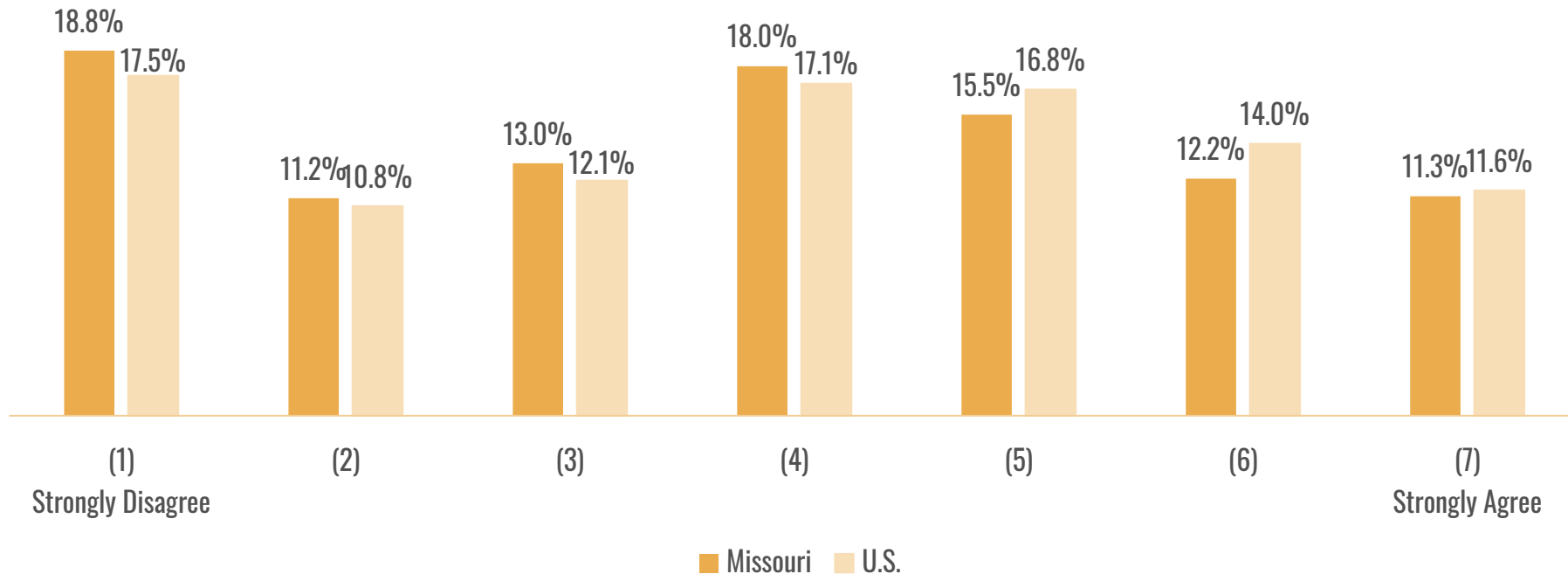
- Time Spent on Social Media
- Social Media for Decision Making
- Trust in Online Forums/Posts
- Expressing Opinions Online



Travelers Time Spent on Social Media

- A larger portion of Missouri and U.S. travelers disagree that they spend a lot of time on social media.
- There has been a steady decline 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 to 23.5% in FY22.

I Spend a Lot of Time on Social Media



Top 2 Box (Spend a lot of Time) %

MO FY22: 23.5%

MO FY21: 27.4%

MO FY20: 35.0%

U.S. FY22: 25.6%

U.S. FY21: 32.8%

U.S. FY20: 34.2%

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

MO FY22: 30.0%

MO FY21: 24.2%

MO FY20: 19.2%

U.S. FY22: 28.3%

U.S. FY21: 22.1%

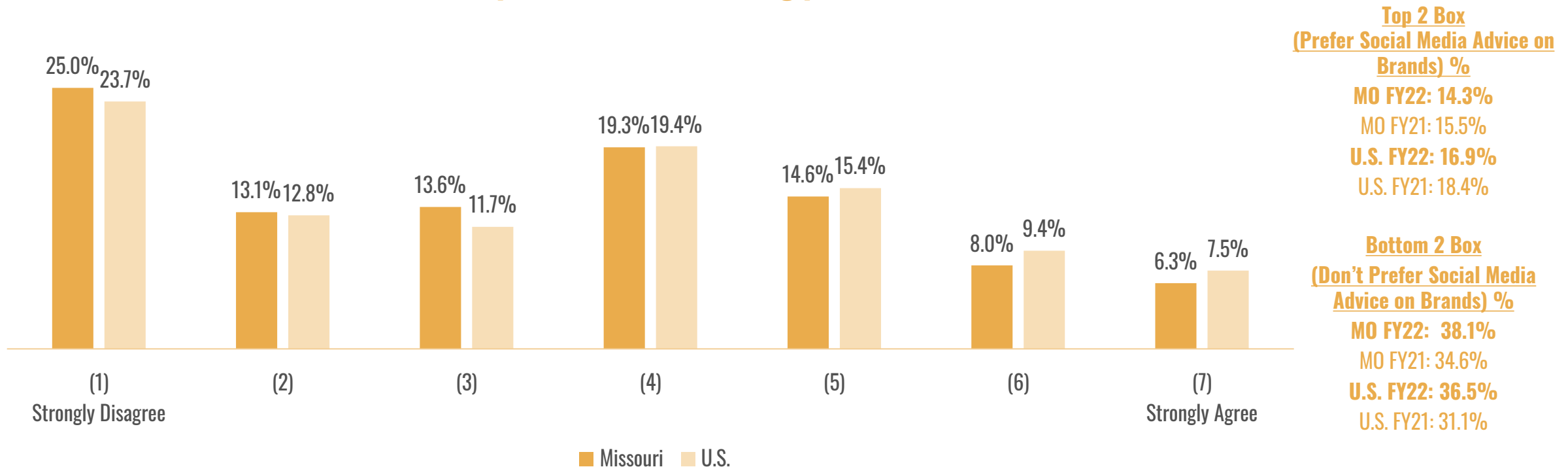
U.S. FY20: 19.8%

Travelers Use of Social Media for Decision Making



- Only 14.3% of Missouri visitors and 16.9% 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

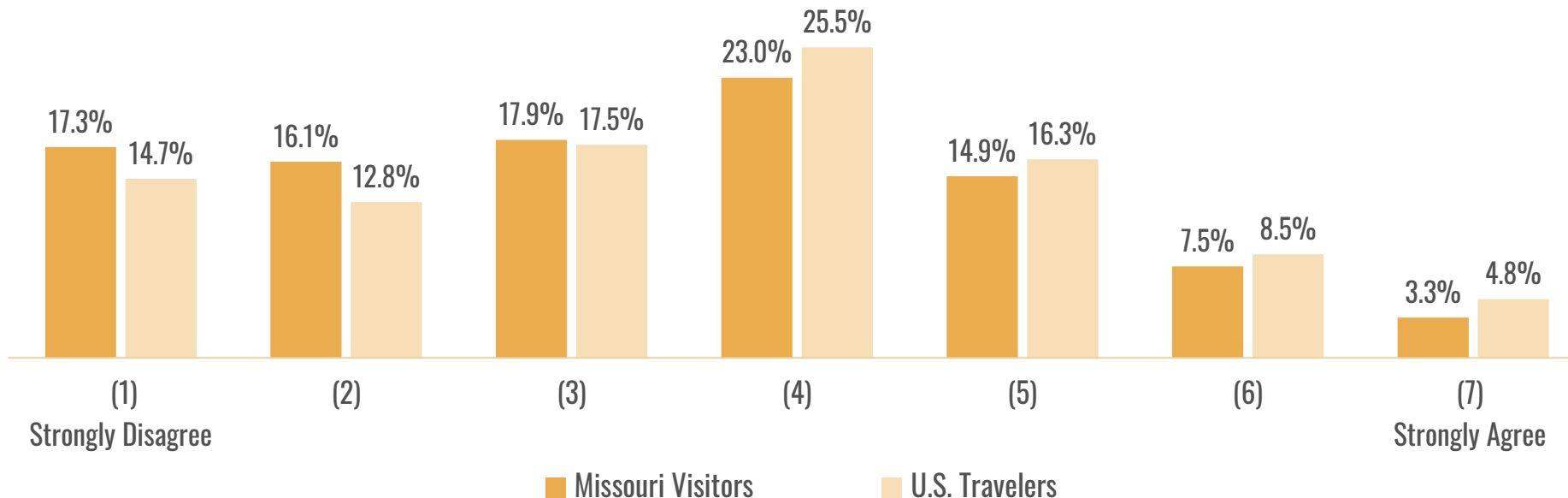


Travelers Trust in Online Forums/Posts



- 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 FY22: 10.8%

MO FY21: 12.3%

MO FY20: 11.7%

U.S. FY22: 13.3%

U.S. FY21: 14.4%

U.S. FY20: 13.6%

Bottom 2 Box (Can't Trust) %

MO FY22: 33.4%

MO FY21: 35.2%

MO FY20: 37.3%

U.S. FY22: 27.5%

U.S. FY21: 32.2%

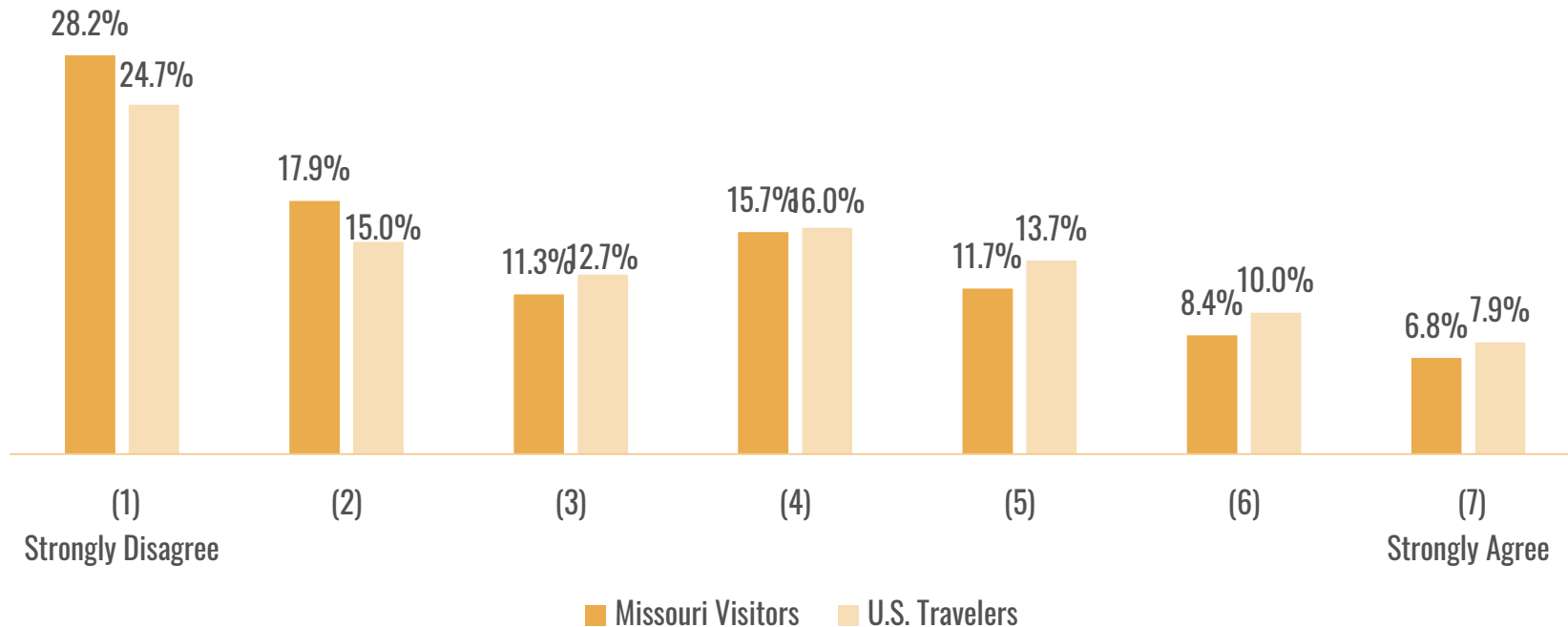
U.S. FY20: 34.8%

Travelers Expressing Brand Opinions Online



- The largest share (46.1%) of Missouri visitors report they don't often express their opinions on brands online.
- Only 15.2% 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 FY22: 15.2%

MO FY21: 16.2%

MO FY20: 15.0%

U.S. FY22: 17.9%

U.S. FY21: 21.2%

U.S. FY20: 19.1%

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

MO FY22: 46.1%

MO FY21: 39.2%

MO FY20: 34.9%

U.S. FY22: 39.7%

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.