



Economic Impact and Visit Characteristics of Missouri Tourism

Fiscal Year 2018 Executive Summary

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Developed March 2019



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Introduction and definitions

This study summarizes information from two sources: Tourism Economics' Economic Impact study and the demographics information from OmniTrak America.

- Visitors included travelers from Missouri and other states who came from more than 50 miles outside the usual routine and/or stayed overnight.
- The impact of tourism includes direct spending, the indirect (supply-chain) effects, and induced (income) effects.
- Impacts were measured in terms of employment, income, gross output (business sales), and tax revenues.

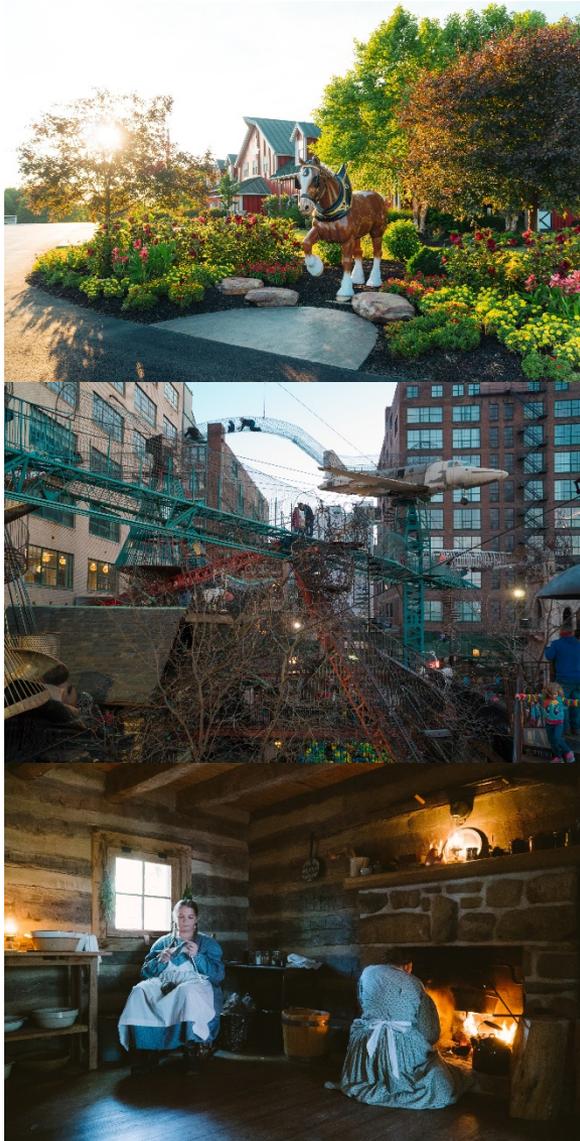


Headline results

- Tourism in Missouri generated a \$17.2 billion impact in FY2018, an increase of 2.4% from FY2017. This economic impact is based upon the spending of an estimated 42.0 million visitors to Missouri.
- Visitor expenditures in tourism-related industries such as hotels/motels, attractions, restaurants, etc. (originally were \$13.5 billion in FY2018 - a 0.6% decrease from FY2017).
- Domestic overnight visitors spent an average of \$100 per person per day, day trippers spent an average of \$93 per person, and the overall average was \$99 per person per day.
- Tourism in Missouri generated \$1.43 billion in local and state tax revenues in FY2018. Including federal taxes, tourism generated \$2.43 billion including federal tax revenues, 1.4% more than in FY2017.



Headline results



- Tourism-related industries in FY2018 provided 301,789 jobs in Missouri for a 1.0% increase over FY2017.
- Approximately 8.0% (1 in 12) of all jobs in the state were in tourism-related industries.
- Just over two-thirds of visitors stayed overnight (66.5%) and 88.5% came for leisure.
- Nearly 43.3% of Missouri's tourism is from within the state, 2.4 percentage points more than a year earlier.
- Visiting friends and family, shopping, sightseeing, and fine dining are common activity for Missouri visitors.

Economic Impacts

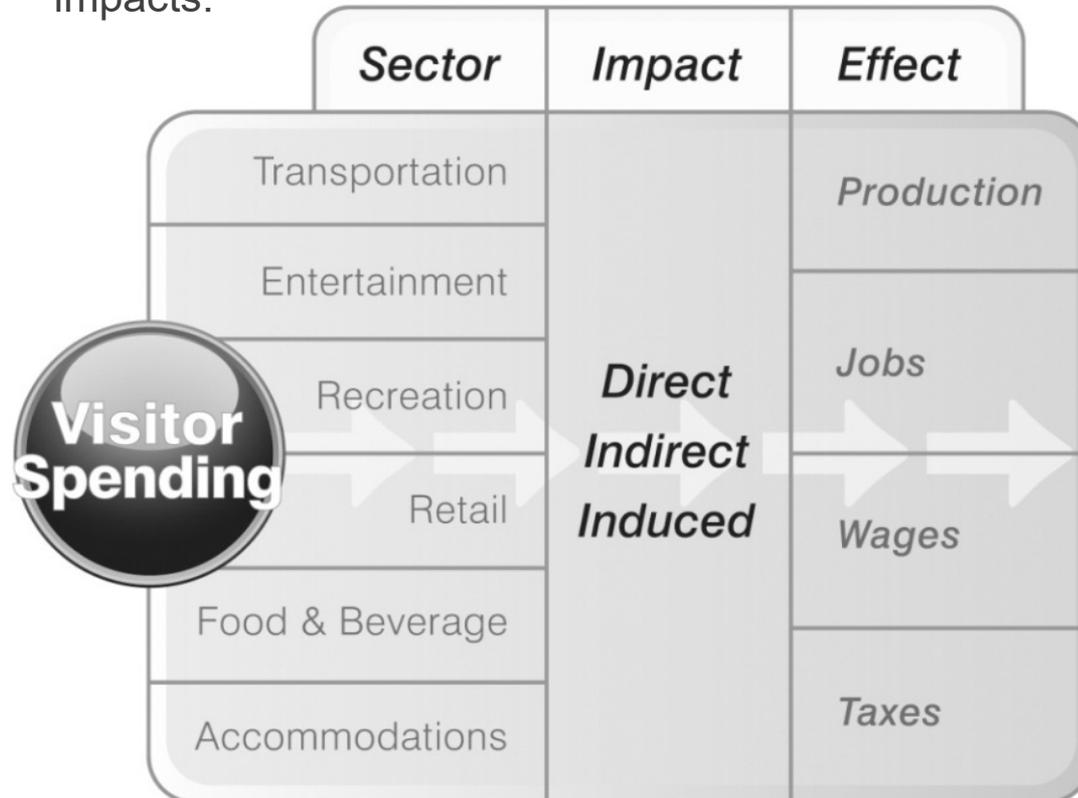


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How visitor spending generates impact

- **Direct impact:** Travelers create direct economic value within a discrete group of sectors (e.g. recreation, transportation). This supports a relative proportion of jobs, wages, taxes, and GDP within each sector.
- **Indirect impact:** Each directly affected sector also purchases goods and services as inputs (e.g. food wholesalers, utilities) into production. These impacts are called indirect impacts.

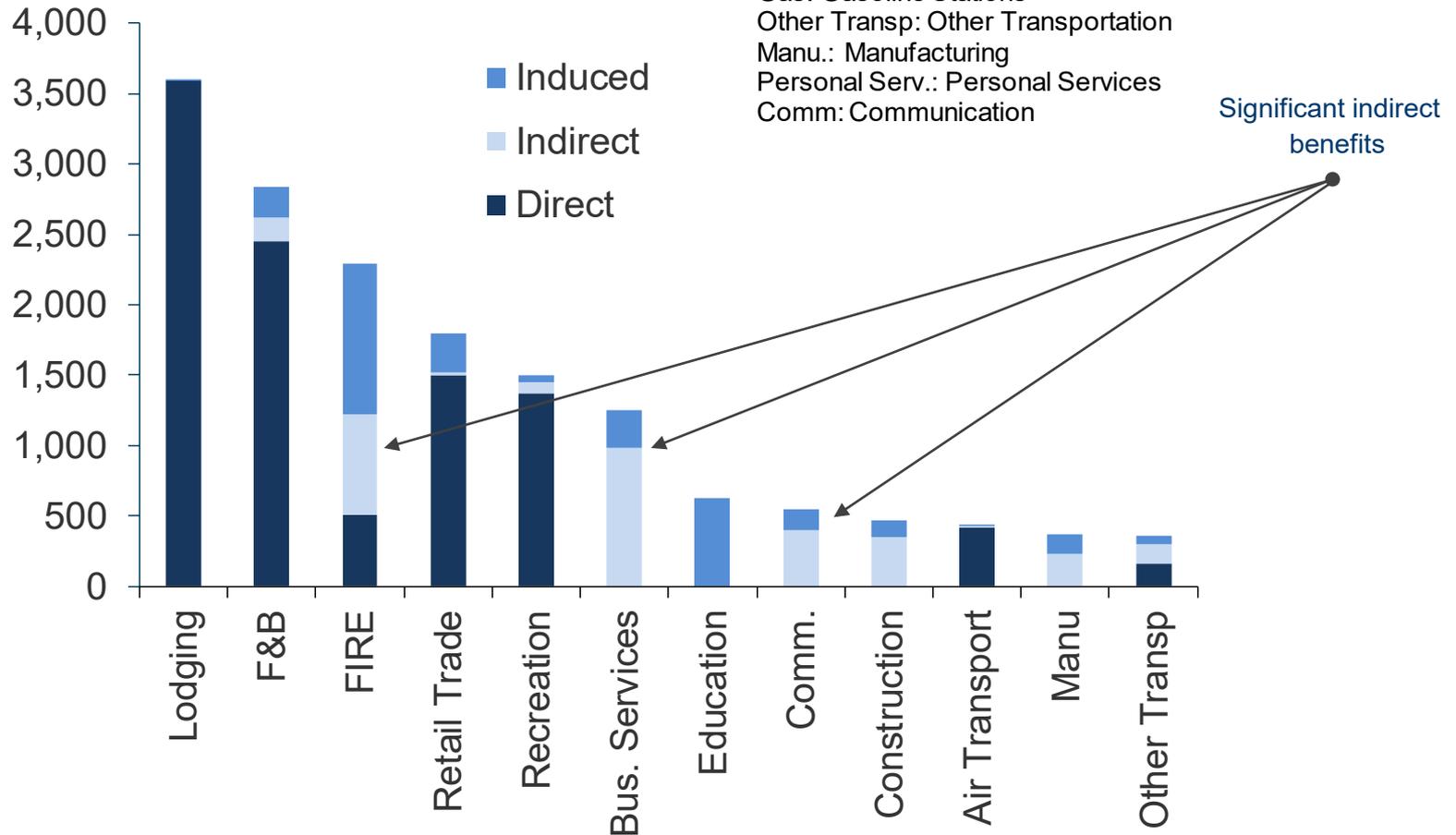


- **Induced impact:** Lastly, the induced impact is generated when employees whose incomes are generated either directly or indirectly by tourism, spend those incomes in the Missouri economy.

Total economic impact – gross output

Gross Output by Industry

\$ million



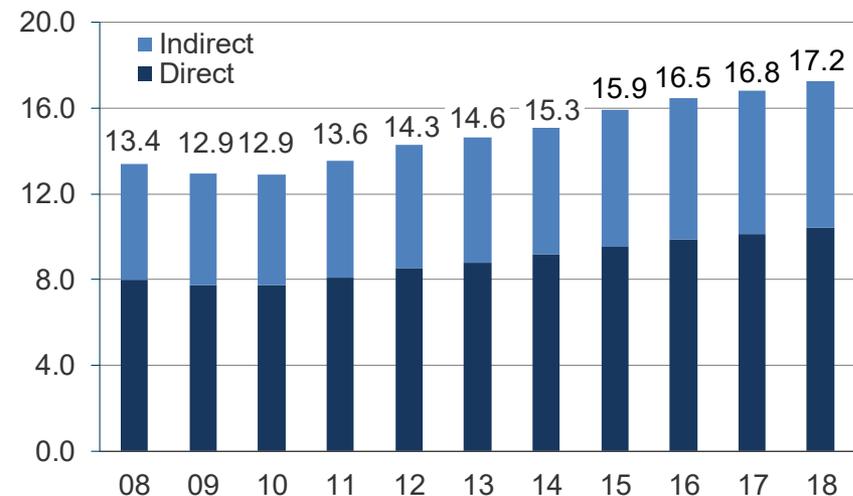
* Direct sales include cost of goods sold for retail

Total tourism impact over time

- The total economic impact of tourism in Missouri, as measured by gross output, has increased by 28.6% over the last decade.
- As more visitors travel to and within the state, and visitor spending grows, the industry sustains more direct and indirect employment and income.
- On average, the total economic impact of the industry has grown 2.6% per year since FY2008.

Total Tourism Economic Impact

By fiscal year, \$ billions of gross output



Source: Tourism Economics

Demographics & Characteristics of Missouri's 2018 Travelers

The remainder of this report summarizes information from Missouri's participation in a consortium of state's project called Omni Trak America. 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?



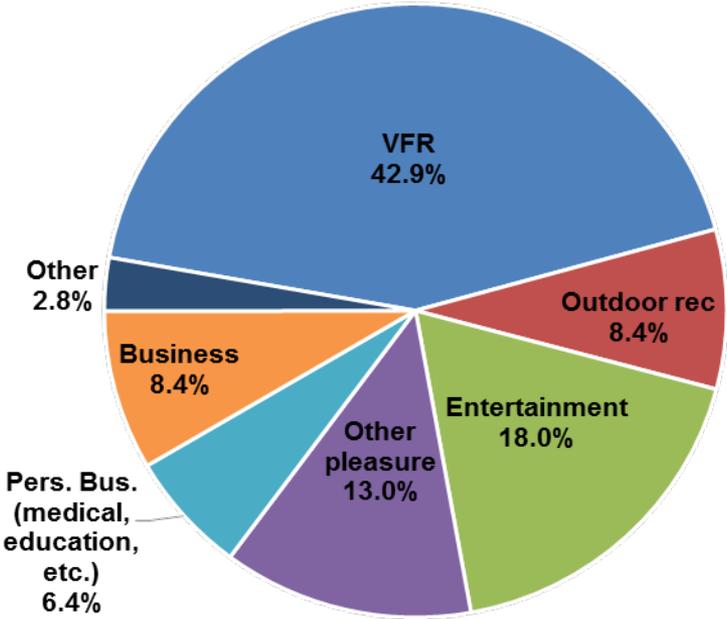
Trip Purpose

- Leisure travel was the primary purpose for coming to Missouri (over 82%)
- More than half of travelers visited friends and family while on their Missouri trip
- Of those who traveled primarily for business reasons, 26% extended their stay for leisure purposes

All Purposes of Trip



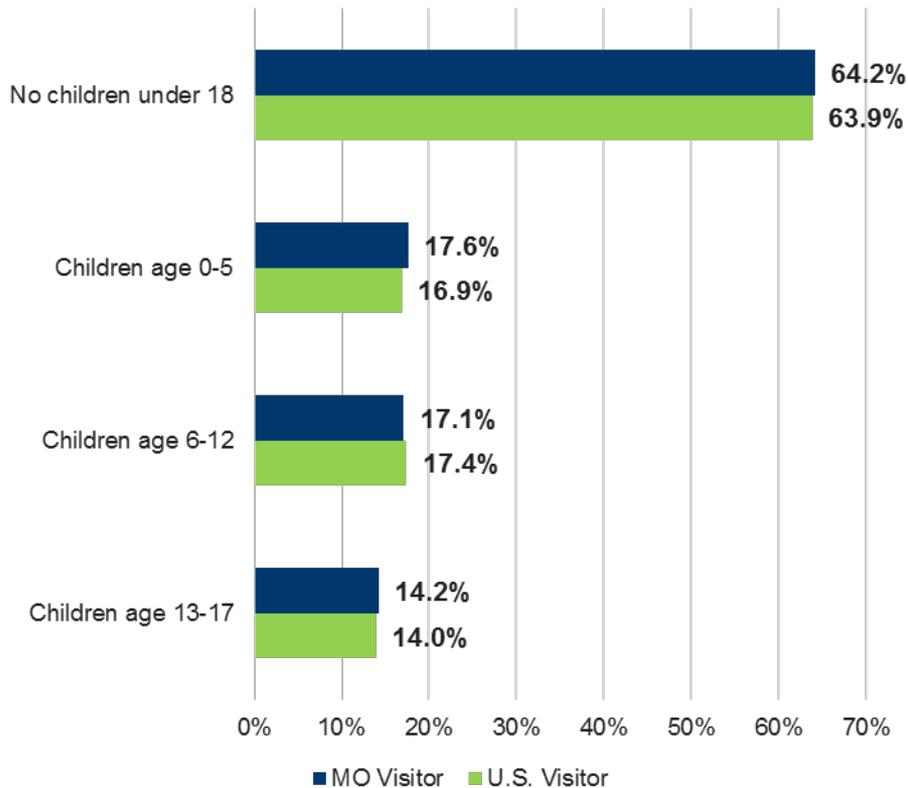
Primary Purpose of Trip to Missouri



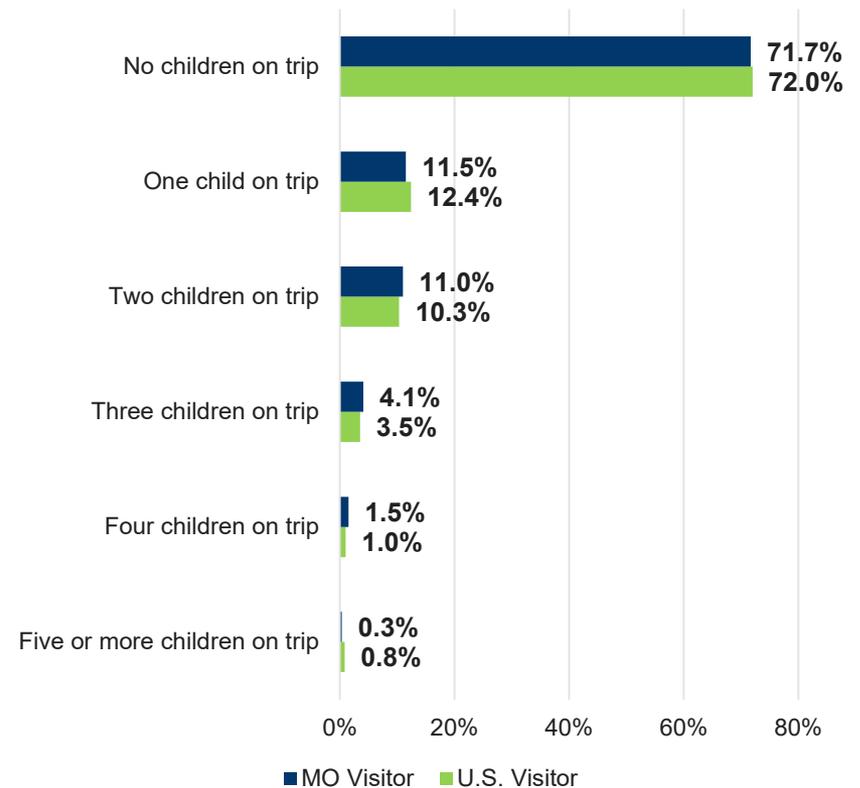
Children in Household and Travel Party

- Nearly 36% of travelers to Missouri have children in their household, but only 28% bring children along on their trip

Children in Household



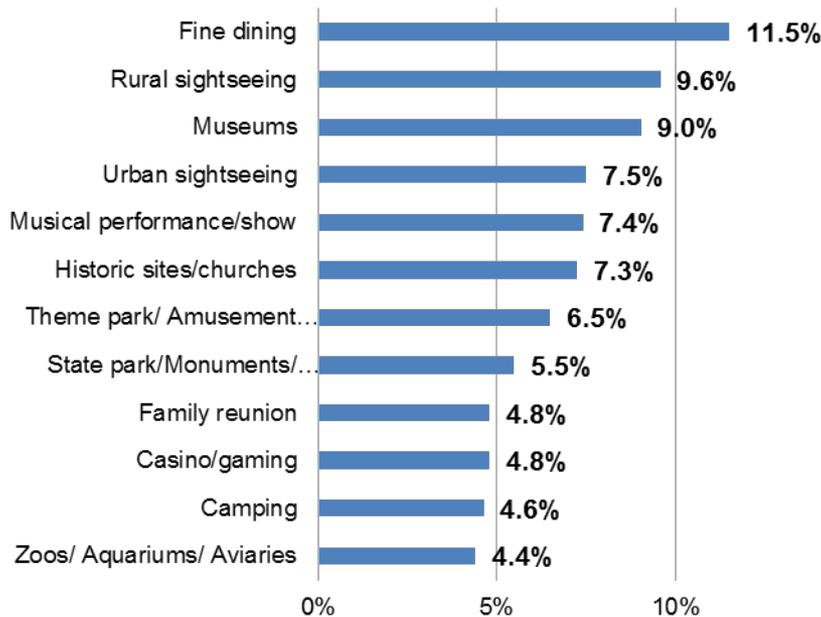
Children in Travel Party



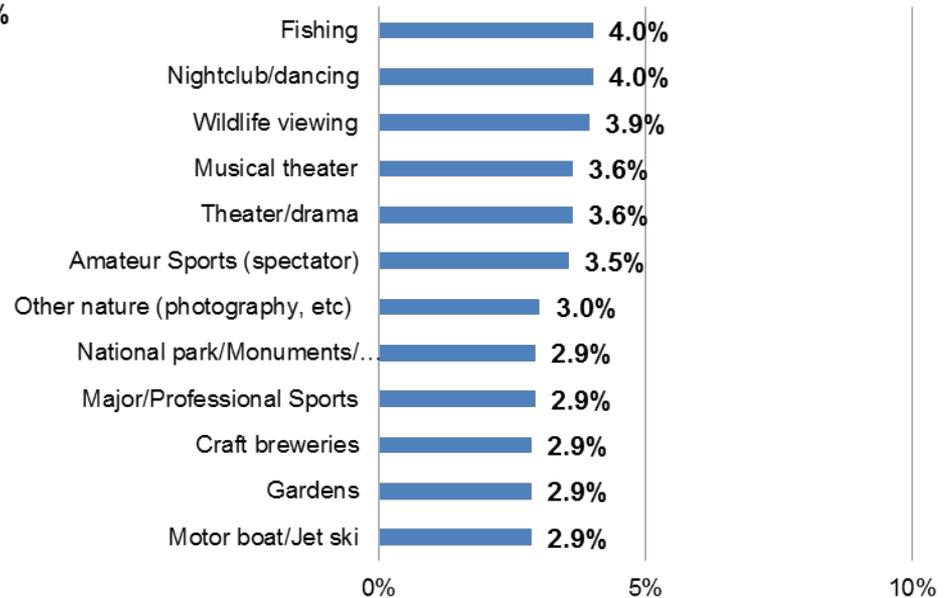
Visitor Activities

- The most commonly reported activities are visiting family (23.9%), shopping (19.2%), and visiting friends (11.7%) (not included in charts below)
- After shopping and seeing friends, the top activities for Missouri visitors include fine dining, rural sightseeing, museums, urban sightseeing, musical performances/shows, and visiting historic sites and churches (All activities in data table – next page.)

Activities While in Missouri



Activities While in Missouri (continued)



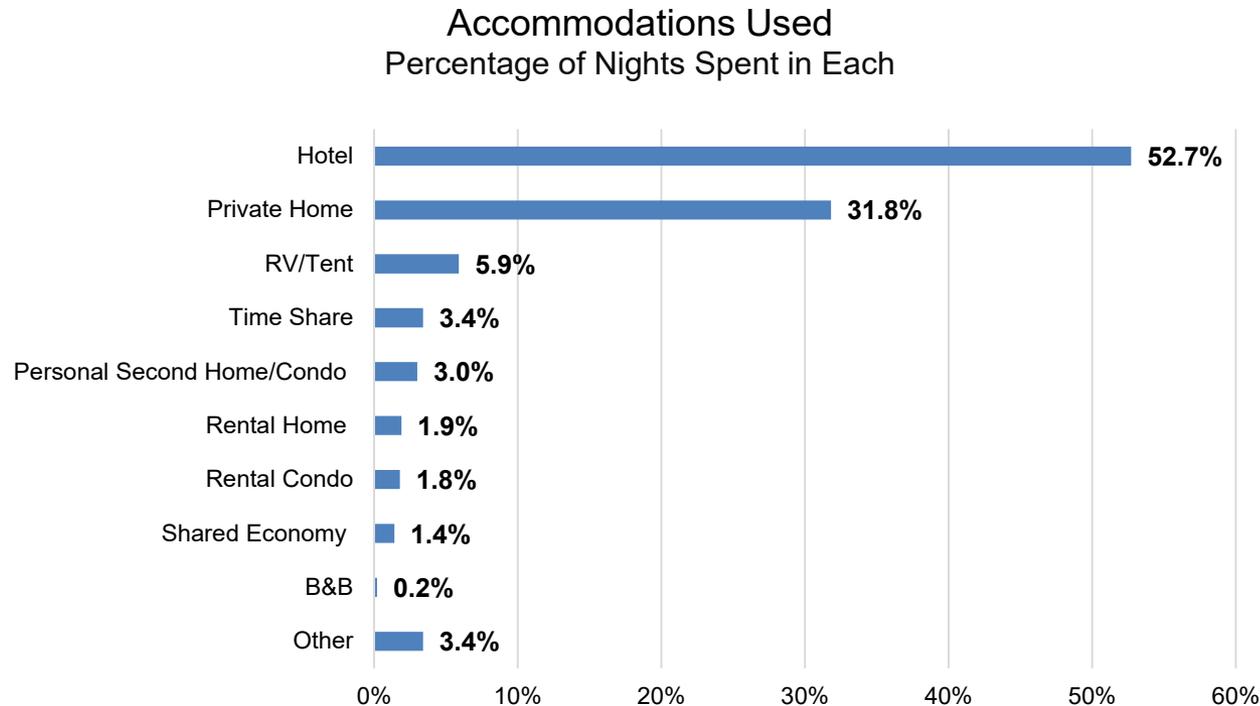
FY18 TravelTrakAmerica

Complete List of Visitor Activities

Activities Engaged in While Traveling in Missouri (Multiple answers allowed)			
Visiting relatives	23.9%	Theater/drama	3.6%
Shopping	19.2%	Amateur Sports (spectator)	3.5%
Visiting friends	11.7%	Other nature (photography, rock hound, etc.)	3.0%
Fine dining	11.5%	National Park/Monuments/ Recreation areas	2.9%
Rural sightseeing	9.6%	Major/ Professional Sports	2.9%
Museums	9.0%	Craft breweries	2.9%
Urban sightseeing	7.5%	Gardens	2.9%
Musical performance/show	7.4%	Motor boat/Jet ski	2.9%
Historic sites/churches	7.3%	Special events/Festivals	2.8%
Theme/ Amusement/ Water	6.5%	Wine tasting/winery tour	2.8%
State Park/Monuments/Recreation areas	5.5%	Art galleries	2.7%
Casino/gaming	4.8%	Caverns	2.7%
Family reunion	4.8%	Hiking/ Backpacking/ Canyoneering	2.4%
Camping	4.6%	Old homes/mansions	2.2%
Zoos/ Aquariums/ Aviaries	4.4%	Bird watching	1.6%
Fishing	4.0%	Local/folk arts/crafts	1.5%
Nightclub/dancing	4.0%	Golf	1.3%
Wildlife viewing	3.9%	Whitewater rafting/ Kayaking/ Canoeing/ Paddleboarding	1.3%
Musical theater	3.6%	Hunting	1.2%

Accommodations

- Among visitors staying overnight, more than half stay in paid accommodations, such as a hotel, time share, or bed and breakfast
- The percentage of nights spent in private homes declined for the second year in a row, dropping from 34.8% in FY16 to 32.2% in FY17 to 31.8% in FY18
- The percentage of nights spent in a RV/Tent increased from 4.3% last year to 5.9% in FY18



Map of Top Source Markets by State

After Missouri, the top visitation source markets are Illinois, Arkansas and Kansas

