



Economic Impact and Visit Characteristics of Tourism in Missouri

Fiscal Year 2019 Executive Summary



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 \$17.7 billion impact in FY2019, an increase of 2.9% from FY2018. This economic impact is based upon the spending of an estimated 42.9 million visitors to Missouri.
- Visitor expenditures in tourism-related industries such as hotels/motels, attractions, restaurants, etc. (as defined by NAICS codes) were \$14.0 billion in FY2019 - a 1.8% increase from FY2018.
- Domestic overnight visitors spent an average of \$104 per person per day, day trippers spent an average \$93 per person, and the overall average was \$103 per person per day, a 3.9% increase.
- Tourism in Missouri generated \$1.46 billion in local and state tax revenues in FY2019. Including federal taxes, tourism generated \$2.48 billion including federal tax revenues, 2.0% more than in FY2018.



Headline results

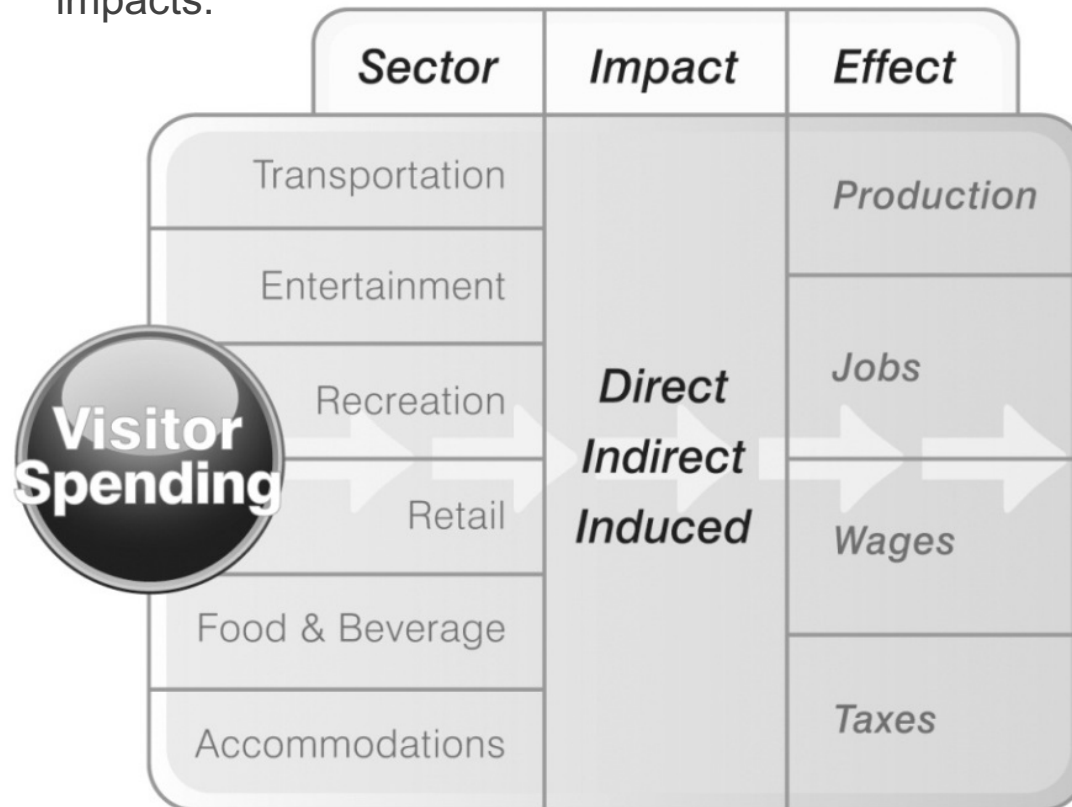


- Tourism-related industries in FY2019 provided 304,329 jobs in Missouri for a 0.8% increase over FY2018.
- Approximately 8.0% (1 in 12) of all jobs in the state were in tourism-related industries.
- Just over two-thirds of visitors stayed overnight (66.5%) and 85.4% came for leisure.
- Just over 42% of Missouri's tourism is from within the state, 1.3 percentage points less than a year earlier.
- Visiting friends and family, shopping, rural sightseeing, fine dining and museums are common activities for Missouri visitors.

Economic Impacts

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.

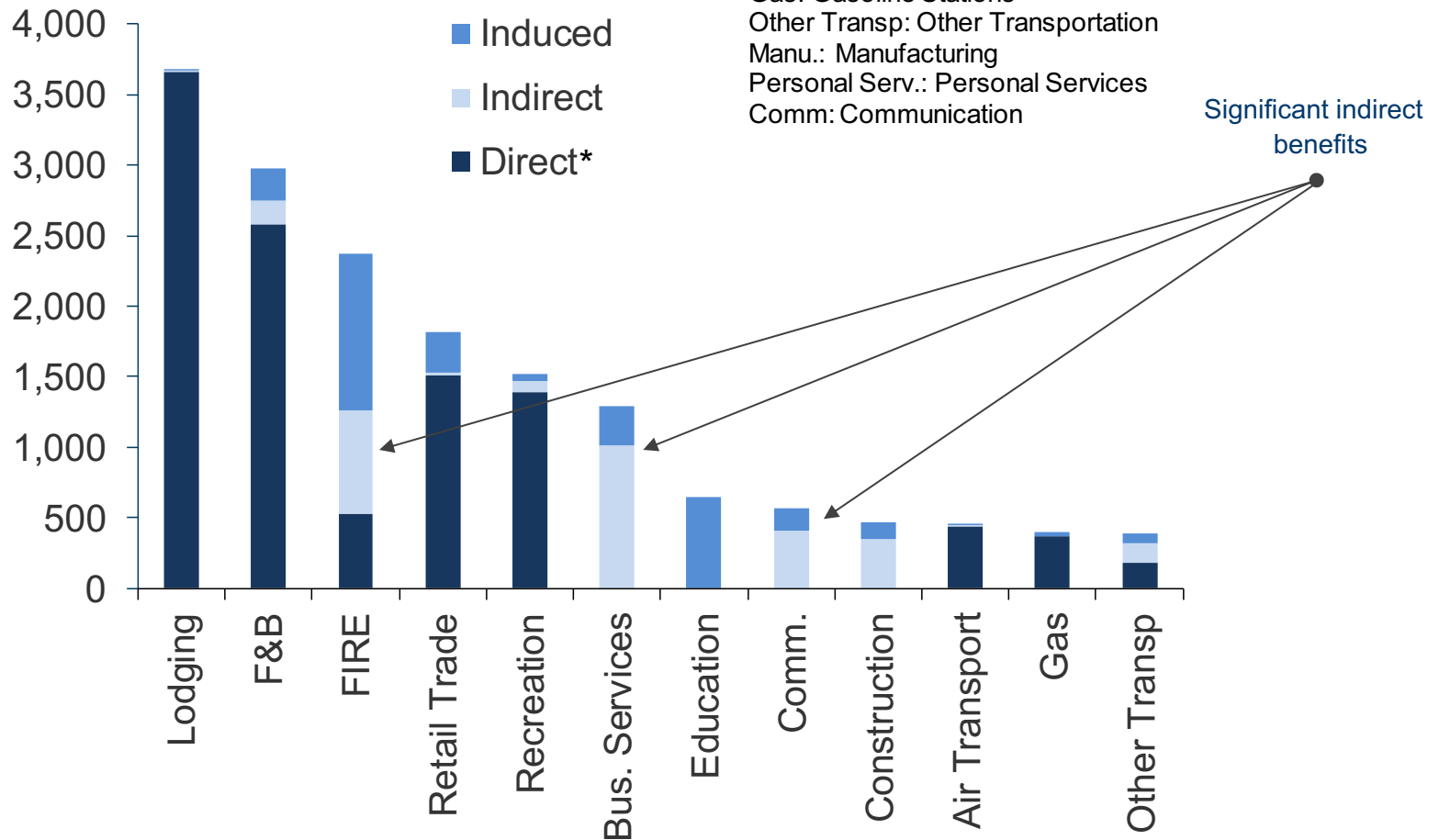


- **Induced impact:** Lastly, the induced impact is generated when employees whose incomes are generated either directly or indirectly by tourism, spend those incomes in the Missouri economy.

Total economic impact – gross output

Gross Output by Industry

\$ million



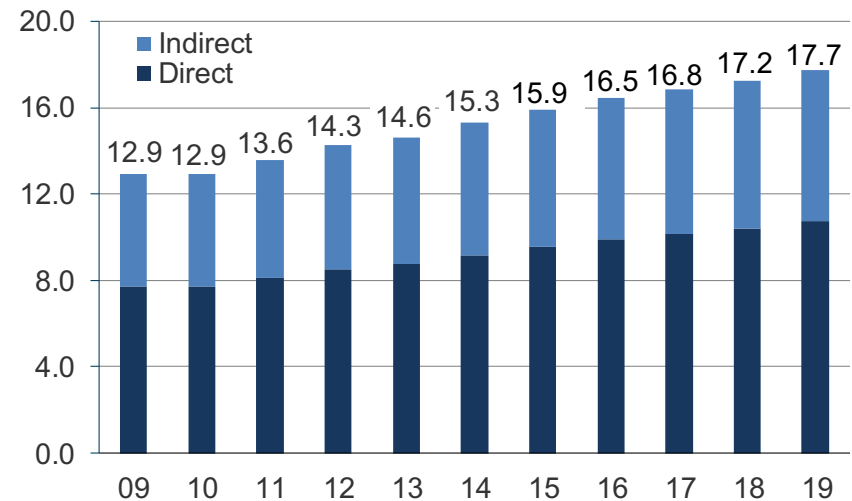
* Direct sales include cost of goods sold for retail

Total tourism impact over time

- The total economic impact of tourism in Missouri, as measured by gross output, has increased by 37.2% 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 3.6% per year since FY2010.

Total Tourism Economic Impact

By fiscal year, \$ billions of gross output



Source: Tourism Economics

Demographics & Characteristics of Missouri's 2019 Travelers

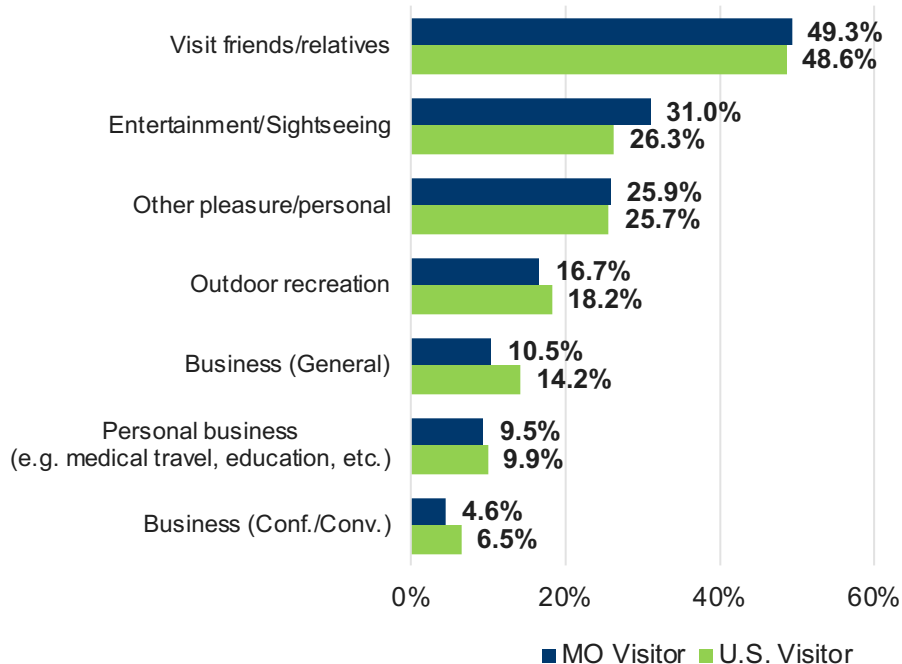


The remainder of this report summarizes information from Missouri's participation in a consortium of state's project called Omni Trak America. The characteristics of what we know about the trips taken by Missouri visitors mainly comes down to: Why did they come? Who came on the trip? What did they do? Where did they go? When did they come? How did they get here? Where did they stay?

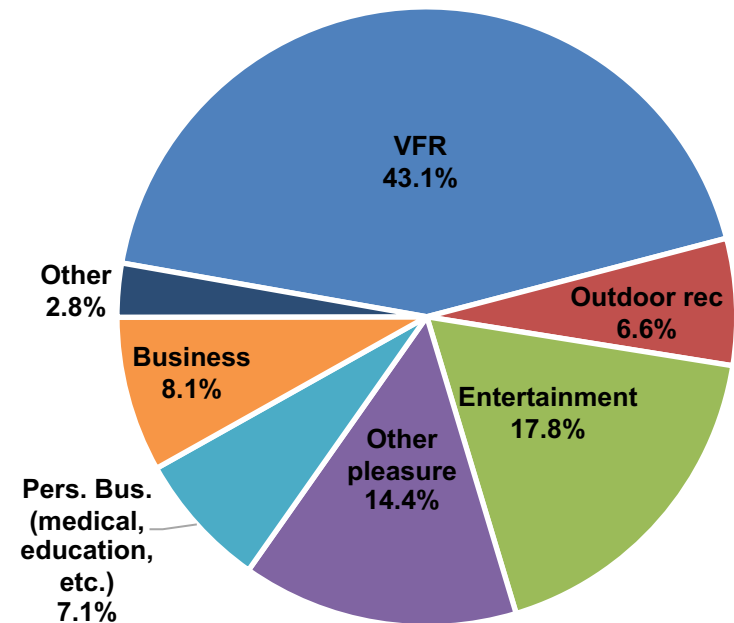
Trip Purpose

- Leisure travel was the primary purpose for coming to Missouri (82%)
- Nearly half (49.3%) of travelers visited friends and family while on their Missouri trip, down from 56.2% who visited friends and family in FY 2018
- Of those who traveled primarily for business reasons, 28.5% extended their stay for leisure purposes

All Purposes of Trip



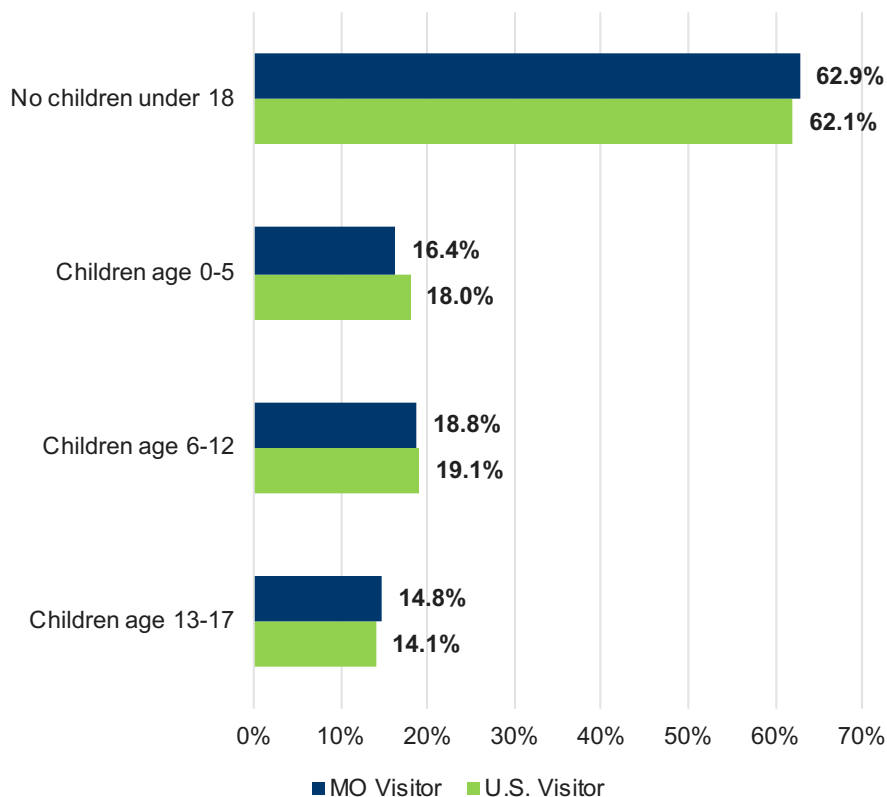
Primary Purpose of Trip to Missouri



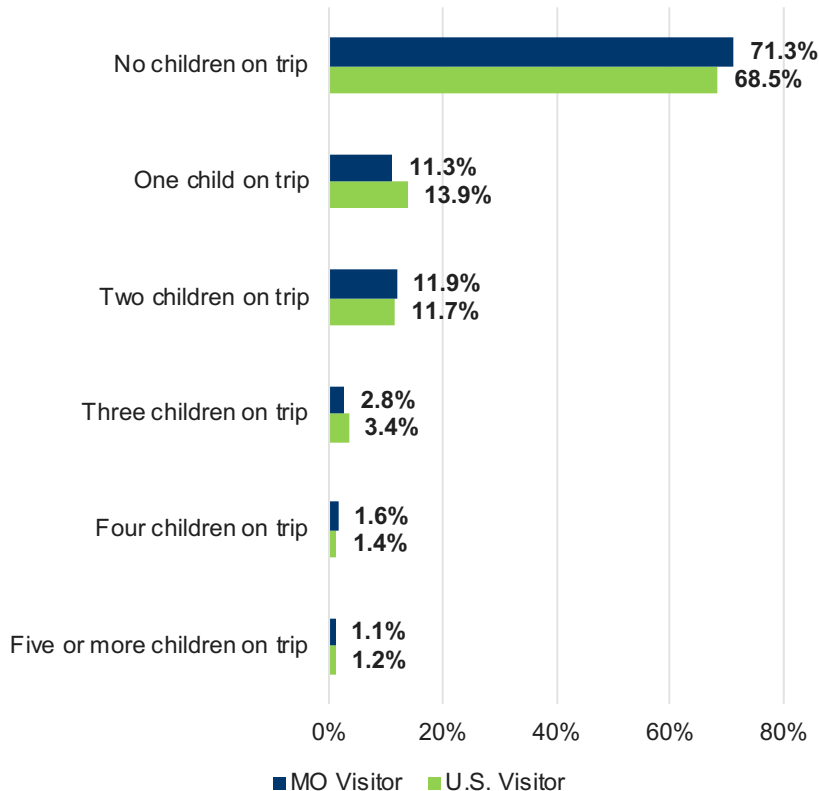
Children in Household and Travel Party

- While 37% of travelers to Missouri have children under 18 in their household, only 29% bring children along on their trip

Children Under 18 in Household



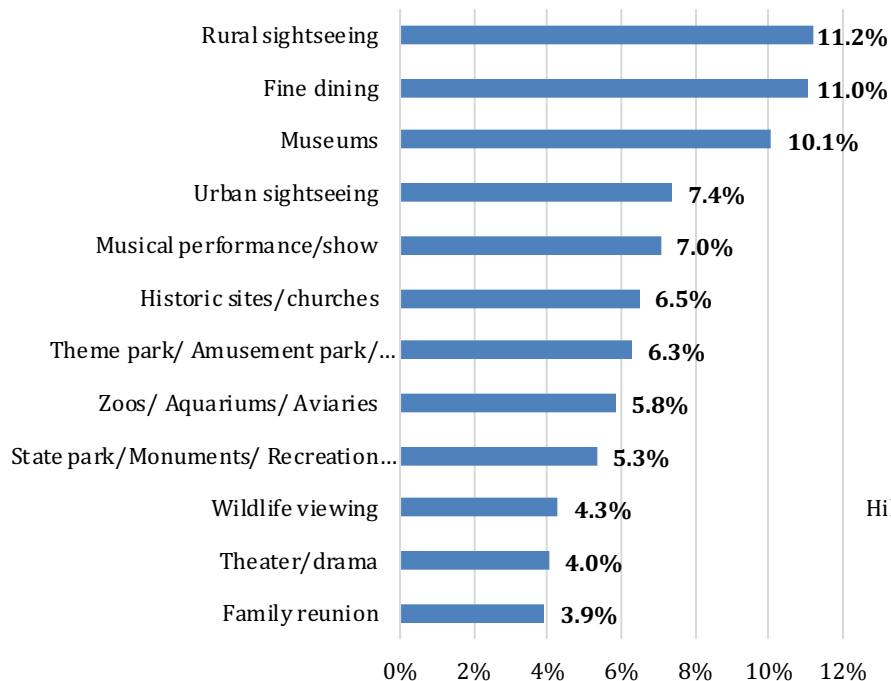
Children Under 18 in Travel Party



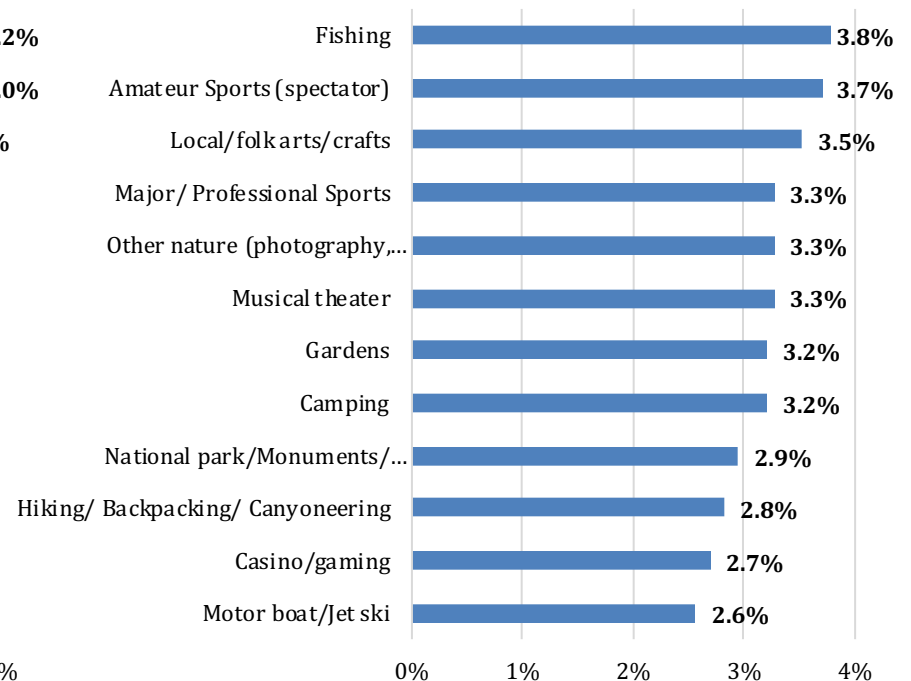
Visitor Activities

- The most commonly reported activities are visiting family (25.3%), shopping (19.5%), and visiting friends (11.6%) (not included in charts below)
- After shopping and seeing friends, the top activities for Missouri visitors include rural sightseeing, fine dining, 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)

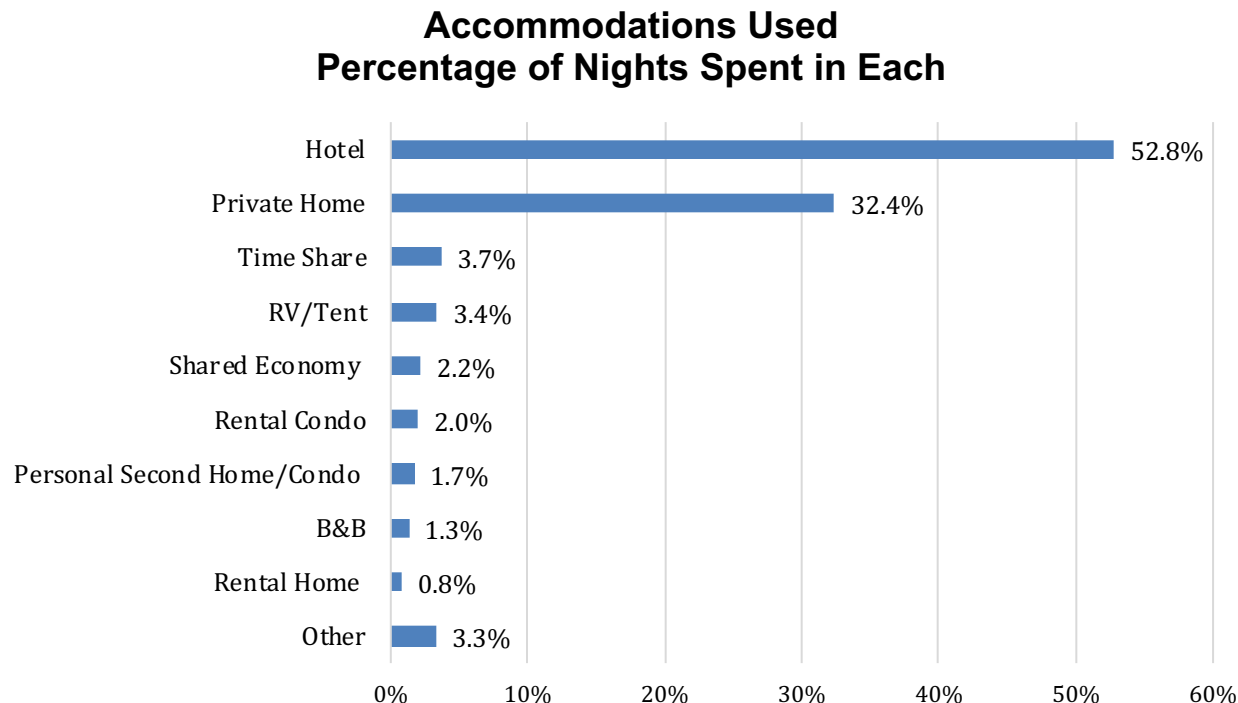


Complete List of Visitor Activities

Activities Engaged in While Traveling in Missouri (Multiple answers allowed)			
Visiting relatives	25.3%	Old homes/mansions	1.7%
Shopping	19.5%	Nightclub/dancing	1.6%
Visiting friends	11.6%	Beach	1.5%
Rural sightseeing	11.2%	Native American ruins/Rock art	1.5%
Fine dining	11.0%	Nature travel/ecotouring	1.4%
Museums	10.1%	Special events/Festivals	1.4%
Urban sightseeing	7.4%	Water skiing	1.2%
Musical performance/show	7.0%	Bird watching	0.9%
Historic sites/churches	6.5%	Farms/ Ranches/ Agri-tours	0.9%
Theme park/ Amusement park/ Water park	6.3%	Amateur Sports (participant)	0.9%
Zoos/ Aquariums/ Aviaries	5.8%	Symphony/opera/concert	0.9%
State park/Monuments/ Recreation areas	5.3%	Distilleries	0.8%
Wildlife viewing	4.3%	ATV/Four-wheeling	0.8%
Theater/drama	4.0%	Biking /Road biking/ Cycling	0.6%
Family reunion	3.9%	Horseback riding	0.6%
Fishing	3.8%	Hunting	0.6%
Amateur Sports (spectator)	3.7%	Spa/health club	0.6%
Local/folk arts/crafts	3.5%	Whitewater rafting/ Kayaking/ Canoeing/ Paddleboarding	0.6%
Musical theater	3.3%	Rock/mountain climbing	0.4%
Other nature (photography, rockhound, etc.)	3.3%	High School/College reunion	0.3%
Major/ Professional Sports	3.3%	Rodeo/State fair	0.3%
Camping	3.2%	Sailing	0.3%
Gardens	3.2%	Scuba diving/snorkeling	0.3%
National park/Monuments/ Recreation areas	2.9%	Area where a TV show or movie was filmed	0.2%
Hiking/ Backpacking/ Canyoneering	2.8%	Hang gliding/ Skydiving/ Base jumping	0.2%
Casino/gaming	2.7%	Horseracing	0.2%
Motor boat/Jet ski	2.6%	Motor sports - NASCAR/Indy	0.2%
Wine tasting/winery tour	2.5%	Tennis	0.2%
Caverns	2.2%	Mountain biking	0.1%
Art galleries	2.0%	Snowmobiling	0.1%
Craft breweries	2.0%	Skiing/snowboarding	0.0%
Golf	2.0%	Other snow sports	0.0%

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 increased slightly in FY19 to 32.4%, up from 31.8% in FY18
- The percentage of nights spent in shared economy lodging (Airbnb, VRBO, etc.) increased from 1.4% last year to 2.2% in FY19



Map of Top Source Markets by State

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

