

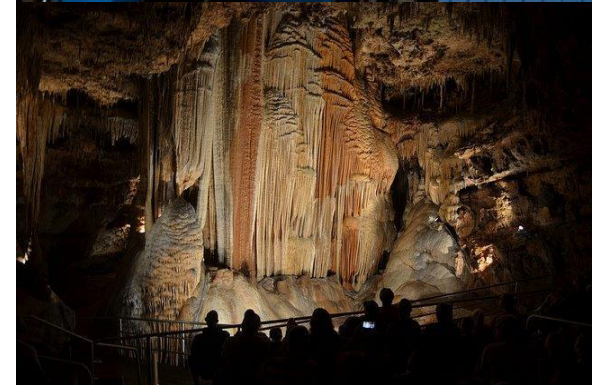
# The Economic Impact of Tourism in Missouri

## Fiscal Year 2015 Analysis Executive Summary



# Headline results

- Tourism is an integral part of the Missouri economy, and the industry is making significant contributions to economic output, employment, and tax revenues.
- Tourism in Missouri generated an estimated \$15.9 billion in FY15 for a total economic impact (business sales), including indirect and induced impacts. This economic impact is based upon an estimated 40.4 million visitors to Missouri.
- Domestic overnight visitors spent an average of \$96 per person per day, while the average for day trippers was \$87.
- Tourism in Missouri generated \$1.3 billion in local and state tax revenues in FY2015, and a total of \$2.3 billion including federal tax revenues.



# Headline results



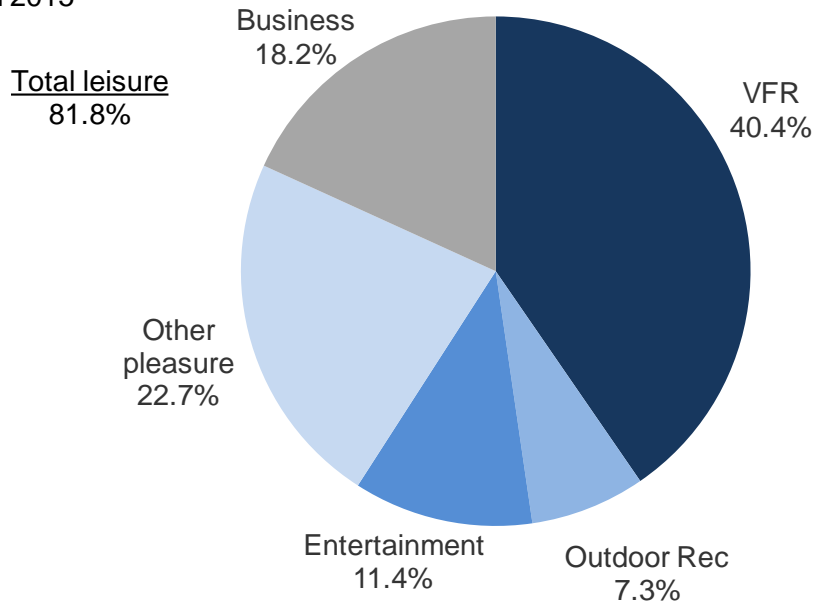
- Tourism-related industries provided 297,129 jobs in Missouri in FY2015.
- Approximately 8.2% (1 in 12) of all jobs in the state were in tourism-related industries.
- Nearly two-thirds of visitors stayed overnight (64.9%) and 81.8% came for leisure.
- Nearly 24% of visitors come in Spring, 30% in Summer, and 28% in Fall.
- While neighboring states are key source markets for Missouri's travelers, 45% of Missouri's tourism is from within Missouri.
- Visiting friends and family is the most common activity for Missouri visitors, followed by shopping, sightseeing, and fine dining.

# Visitor characteristics

- Leisure visitors account for 82% of total visitors. While 40% of visitors come to see friends and family, 42% engage in other pleasure activities in the state.
- Most visitors (82.9%) travel to destinations in the state using their own vehicle.

## Primary Purpose of Trip to Missouri

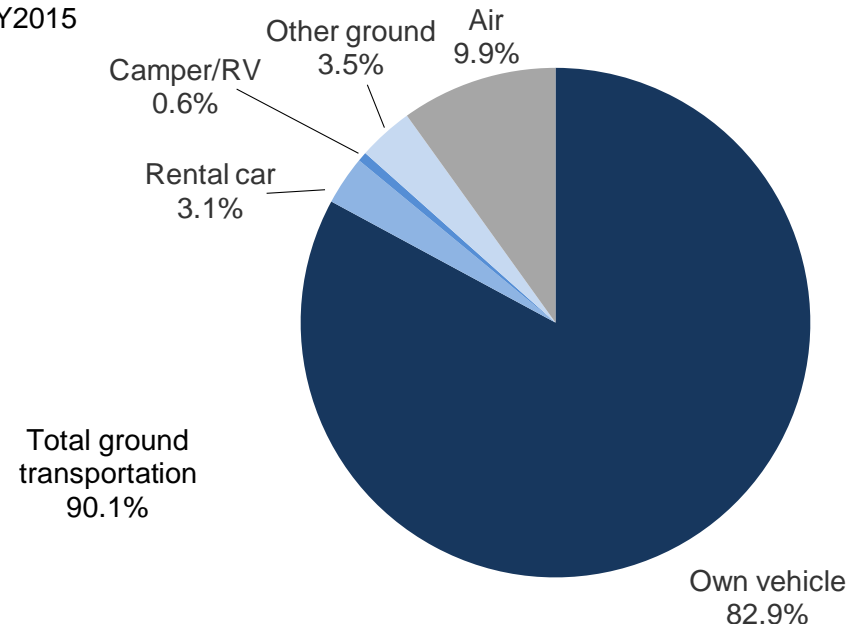
FY2015



Sources: TNS, Tourism Economics

## Primary Mode of Transportation

FY2015



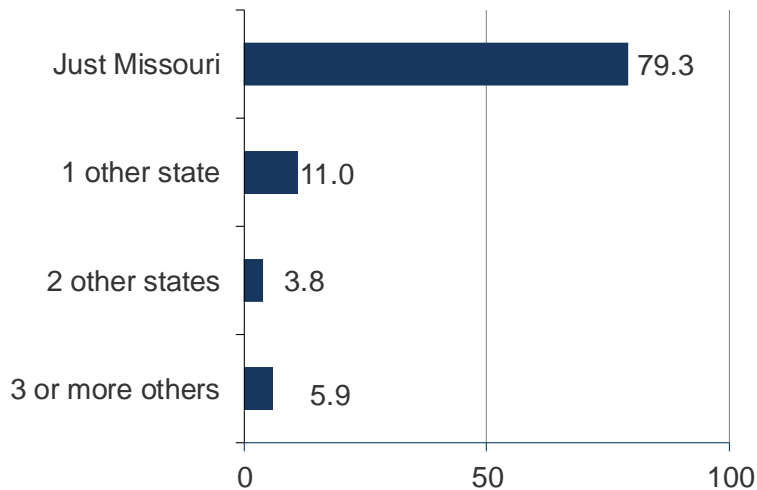
Sources: TNS, Tourism Economics

# Visitor characteristics: trip-chaining

- While most visitors to Missouri do not visit other states on the same trip, 20.7% did visit at least one other state on their trip.
- The top “other states” visited include Illinois, Kansas, and Arkansas.

## Multiple States Visited on Trip

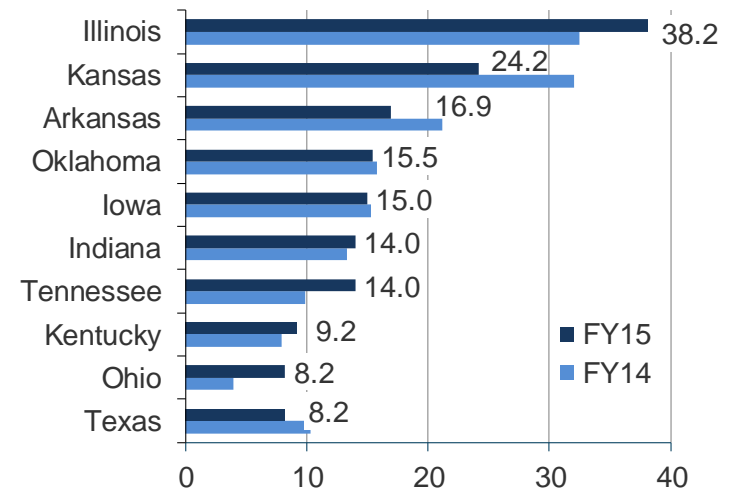
FY2015, %



Sources: TNS, Tourism Economics

## Top "Other States"

% among those who visited another state on the trip, FY15 labeled



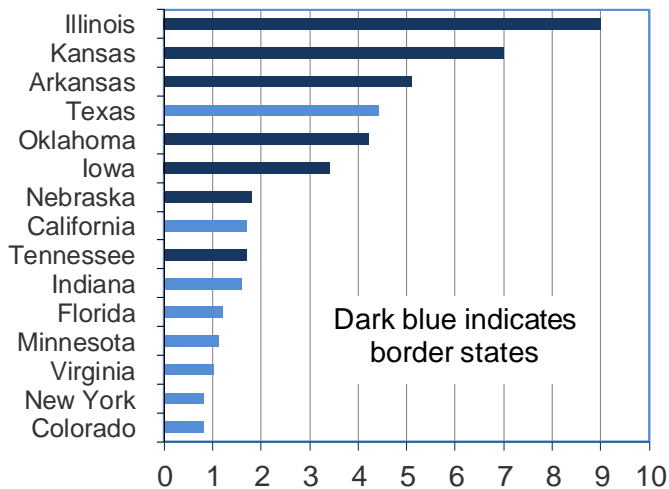
Sources: TNS, Tourism Economics

# Source markets

- Missouri's tourism is primarily regional and nearly half of all visitors come from within the state. Neighboring states continue to be key source markets.
- By Destination Marketing Area (DMA), larger metro areas are the key source markets.
- Destinations in the list of top source markets last year but not this year include Kentucky, Michigan, and Ohio.

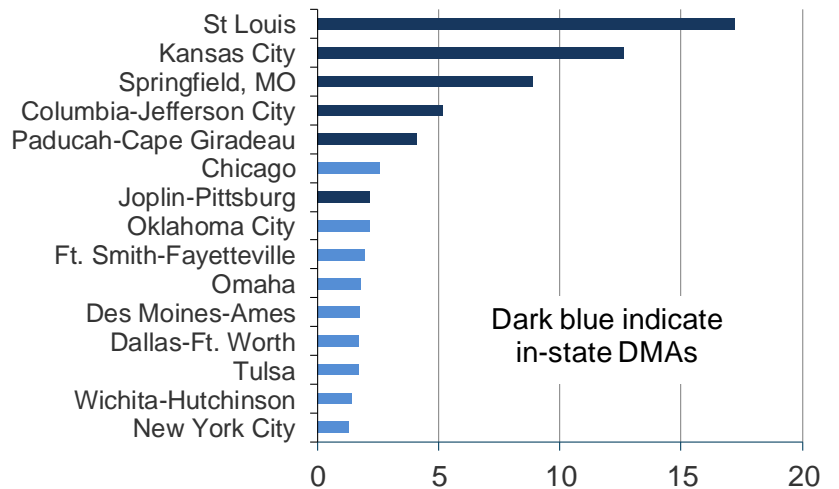
## Top Source Markets by State

FY2015, % of total visitors, Missouri=44.8% of the total



## Top Source DMA Regions

FY2015, % of total visitors



Sources: TNS, Tourism Economics

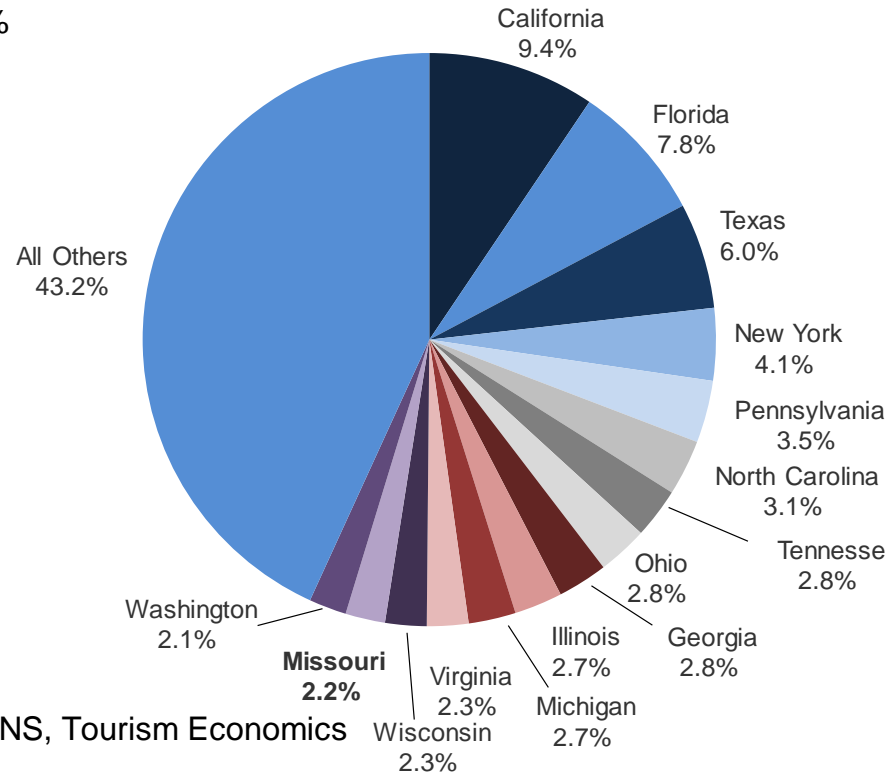
Sources: TNS, Tourism Economics

# US market shares by state

- Missouri captured 2.2% of all US visitation in FY2015 and ranked 14<sup>th</sup> of all states. This share held steady from FY2014.

## US Market Shares by Top 15 States

FY2015, %



Sources: TNS, Tourism Economics

The 2015 Economic Impact of Tourism in Missouri Report was prepared by:



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