Mississippi Gulf Coast

2015 Visitor Study

December 5, 2016
Research Objectives

- The visitor research program is designed to provide:
  - Estimates of domestic overnight and day visitor volumes to Mississippi Gulf Coast
  - A profile of Mississippi Gulf Coast’s performance within its overnight travel market
  - Domestic visitor expenditures in Mississippi Gulf Coast
  - Profiles of Mississippi Gulf Coast’s day travel market
  - Relevant trends in each of these areas
Methodology

- Each quarter, a random, projectable sample of adult members (18 years of age and over) of a major U.S. consumer panel is invited to participate in the Travel USA® survey:
  - Selected to be representative of the U.S. adult population
- For the 2015 travel year, this yielded:
  - 337,164 trips for analysis nationally:
    - 237,555 overnight trips
    - 99,609 day trips
- For Mississippi Gulf Coast, the following sample was achieved in 2015:
  - 806 trips:
    - 509 overnight trips
    - 297 day trips
- For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.
Key Terms Defined

- **An Overnight Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, where you spent one more nights away from home.

- **A Day Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, that did not include an overnight stay. Day trips involve travel of more than 50 miles from home.

- **A Person-Trip** is one trip taken by one visitor.
  - *Person-trips are the key unit of measure for this report.*
Main Purpose of the Trip
Main Purpose of Trip

Base: Total Overnight Person-Trips to Mississippi Gulf Coast

- Visiting friends/relatives: 28%
- Casino: 35%
- Special event: 9%
- Touring: 6%
- Resort: 4%
- Outdoors: 4%
- City trip: 3%
- Golf Trip: 2%
- Cruise: 2%
- Conference/convention: 1%
- Other business trip: 4%
- Business-leisure: 1%

Marketable Trips: 66%
Main Purpose of Leisure Trip — Mississippi Gulf Coast vs. National Norm

Base: Total Overnight Person-Trips

- Casino: Mississippi Gulf Coast - 4, US Norm - 7
- Visiting friends/relatives: Mississippi Gulf Coast - 9, US Norm - 28
- Special event: Mississippi Gulf Coast - 9, US Norm - 7
- Touring: Mississippi Gulf Coast - 6, US Norm - 8
- Resort: Mississippi Gulf Coast - 4, US Norm - 5
- Outdoors: Mississippi Gulf Coast - 4, US Norm - 6
- City trip: Mississippi Gulf Coast - 3, US Norm - 5
- Golf Trip: Mississippi Gulf Coast - 2, US Norm - 2
- Cruise: Mississippi Gulf Coast - 2, US Norm - 2
Main Purpose of Business Trip — Mississippi Gulf Coast vs. National Norm

Base: Total Overnight Person-Trips

- Conference/Convention:
  - Mississippi Gulf Coast: 1%
  - U.S. Norm: 4%

- Other business trip:
  - Mississippi Gulf Coast: 4%
  - U.S. Norm: 6%
Main Purpose of Trip

Base: Total Day Person-Trips to Mississippi Gulf Coast

- **Visiting friends/relatives**: 27
- **Casino**: 28
- **Special event**: 7
- **Touring**: 7
- **Shopping**: 7
- **Outdoors**: 6
- **City trip**: 4
- **Resort**: 3
- **Cruise**: 2
- **Conference/convention**: 2
- **Other business trip**: 5
- **Business-leisure**: 2

**Marketable Trips**: 64%

Percent
Main Purpose of Leisure Trip – Mississippi Gulf Coast vs. National Norm

Base: Total Day Person-Trips

1. Casino
   - Mississippi Gulf Coast: 28%
   - U.S. Norm: 37%

2. Visiting friends/relatives
   - Mississippi Gulf Coast: 27%
   - U.S. Norm: 37%

3. Special event
   - Mississippi Gulf Coast: 7%
   - U.S. Norm: 11%

4. Touring
   - Mississippi Gulf Coast: 7%
   - U.S. Norm: 11%

5. Shopping
   - Mississippi Gulf Coast: 7%
   - U.S. Norm: 8%

6. Outdoors
   - Mississippi Gulf Coast: 8%
   - U.S. Norm: 7%

7. City trip
   - Mississippi Gulf Coast: 4%
   - U.S. Norm: 7%

8. Resort
   - Mississippi Gulf Coast: 2%
   - U.S. Norm: 3%

9. Cruise
   - Mississippi Gulf Coast: 2%
   - U.S. Norm: 1%
Main Purpose of Day Business Trip — Mississippi Gulf Coast vs. National Norm

Base: Total Day Person-Trips

- Conference/Convention: Mississippi Gulf Coast 2, U.S. Norm 2
- Other business trip: Mississippi Gulf Coast 5, U.S. Norm 6
Source of Business
Base: Total Overnight Person-Trips to Mississippi Gulf Coast

- Louisiana: 18%
- Florida: 17%
- Mississippi: 16%
- Alabama: 11%
- Georgia: 8%
- Texas: 6%
- Tennessee: 5%
- California: 4%
- Illinois: 3%
DMA Origin Of Trip

Base: Total Overnight Person-Trips to Mississippi Gulf Coast

- New Orleans, LA: 13
- Mobile-Pensacola, AL/FL/MS: 9
- Atlanta, GA: 5
- Tampa-St. Petersburg-Sarasota, FL: 5
- Jackson, MS: 4
- Baton Rouge, LA: 4
- Memphis, TN/MS/AR: 3
- Hattiesburg-Laurel, MS: 3
- Biloxi-Gulfport, MS: 3
- Miami-Ft. Lauderdale, FL: 2
- Chicago, IL: 2
- Houston, TX: 2
- Dallas-Ft. Worth, TX: 2
- Macon, GA: 2
State Origin Of Trip

Base: Total Day Person-Trips to Mississippi Gulf Coast

- Louisiana: 35
- Mississippi: 29
- Alabama: 12
- Florida: 10
- Texas: 3

Percent
DMA Origin Of Trip

Base: Total Day Person-Trips to Mississippi Gulf Coast

- New Orleans, LA: 29%
- Mobile-Pensacola, AL/FL/MS: 16%
- Hattiesburg-Laurel, MS: 11%
- Baton Rouge, LA: 8%
- Jackson, MS: 7%
- Biloxi-Gulfport, MS: 4%
- Tampa-St. Petersburg-Sarasota, FL: 2%
- Meridian, MS: 2%
- Houston, TX: 2%
- Memphis, TN/MS/AR: 2%
- Montgomery, AL: 2%
- New York, NY/NJ/PA/CT: 2%
Seasonality of the MS Gulf Coast Trip
Season of Trip

Base: Total Overnight Person-Trips to Mississippi Gulf Coast

- January-March: 24
- April-June: 27
- July-September: 26
- October-December: 23

Percent
Season of Trip

Base: Total Day Person-Trips to Mississippi Gulf Coast

- January-March: 24
- April-June: 26
- July-September: 27
- October-December: 23
Satisfaction of the Overnight MS Gulf Coast Trip
Satisfaction with Mississippi Gulf Coast Trip
% Very Satisfied

Base: Total Overnight Person-Trips to Mississippi Gulf Coast

Overall trip experience
Friendliness of people
Quality of accommodations
Quality of food
Value for the money
Sightseeing/attractions
Music/nightlife/entertainment

Percent Very Satisfied

Mississippi Gulf Coast U.S. Norm
Past Visitation of the Overnight MS Gulf Coast
Past Visitation to Mississippi Gulf Coast

Base: Total Overnight Person-Trips to Mississippi Gulf Coast

Ever in the Past - 85%

Past Year - 74%
Length of Trip Planning of the Overnight MS Gulf Coast Trip
Length of Trip Planning

Base: Total Overnight Person-Trips

- **More than 1 year in advance**: Mississippi Gulf Coast 3%, U.S. Norm 3%
- **6-12 months**: Mississippi Gulf Coast 10%, U.S. Norm 13%
- **3-5 months**: Mississippi Gulf Coast 13%, U.S. Norm 16%
- **2 months**: Mississippi Gulf Coast 18%, U.S. Norm 18%
- **1 month or less**: Mississippi Gulf Coast 14%, U.S. Norm 35%
- **Did not plan anything in advance**: Mississippi Gulf Coast 13%, U.S. Norm 40%
Method of Booking of the Overnight MS Gulf Coast Trip
Method of Booking

Base: Total Overnight Person-Trips

- Hotel or resort: Mississippi Gulf Coast (33%), U.S. Norm (15%)
- Online travel agencies: Mississippi Gulf Coast (12%), U.S. Norm (8%)
- 800/888 number: Mississippi Gulf Coast (4%), U.S. Norm (6%)
- Travel agent/company: Mississippi Gulf Coast (6%), U.S. Norm (6%)
- Airline/commercial carrier: Mississippi Gulf Coast (13%), U.S. Norm (8%)
- Advice from relatives or friends: Mississippi Gulf Coast (8%), U.S. Norm (7%)
- Travel company websites: Mississippi Gulf Coast (5%), U.S. Norm (8%)
- Destination websites: Mississippi Gulf Coast (4%), U.S. Norm (4%)
- Auto club/AAA: Mississippi Gulf Coast (4%), U.S. Norm (5%)

Percent
Total Nights
Total Nights Away on Trip

Base: Total Overnight Person-Trips

Average Mississippi Gulf Coast
3.8 nights

Average U.S. Norm
4.0 nights

<table>
<thead>
<tr>
<th>Percent</th>
<th>Mississippi Gulf Coast</th>
<th>U.S. Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 night</td>
<td>19</td>
<td>21</td>
</tr>
<tr>
<td>2 nights</td>
<td>21</td>
<td>26</td>
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<tr>
<td>3-4 nights</td>
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<td>26</td>
</tr>
<tr>
<td>5-6 nights</td>
<td>12</td>
<td>26</td>
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<tr>
<td>7-13 nights</td>
<td>10</td>
<td>11</td>
</tr>
<tr>
<td>14 + nights</td>
<td>3</td>
<td>4</td>
</tr>
</tbody>
</table>

Percent

Mississippi Gulf Coast  U.S. Norm
Number of Nights Spent in Mississippi Gulf Coast

Base: Overnight Person-Trips with 1+ Nights Spent In Mississippi Gulf Coast

Average Nights Spent in Mississippi Gulf Coast = 3.3

- 1 night: 26
- 2 nights: 27
- 3-4 nights: 32
- 5-6 nights: 5
- 7 + nights: 10

Percent
Travel Party Size
Size of Travel Party

Base: Total Overnight Person-Trips

Mississippi Gulf Coast
- Average No. of People: 2.3 Adults, 0.7 Children
- Total = 3.0

U.S. Norm
- Average No. of People: 2.3 Adults, 0.6 Children
- Total = 2.9

Average No. of People
- Adults
- Children

Total = 3.0
Total = 2.9
Size of Travel Party

Base: Total Day Person-Trips

Mississippi Gulf Coast
- Average No. of People
  - Adults: 2.2
  - Children: 0.7
  - Total = 2.9

U.S. Norm
- Average No. of People
  - Adults: 2.1
  - Children: 0.7
  - Total = 2.8

Average No. of People
- Adults
- Children
Transportation Used for the Overnight MS Gulf Coast Trip
Accommodations Used on the Overnight MS Gulf Coast Trip
Accommodations

Base: Total Overnight Person-Trips

- Hotel/Motel: 71%
- Home of Friend/Relative: 17%
- Bed & Breakfast: 28%
- Rented Home/Condo/Apartment: 26%
- Campground/Trailer Park/RV Park: 13%
- Time Share: 12%
- Country Inn/Lodge: 8%
- Rented Cottage/Cabin: 6%
- Own Home/Condo/Apt/2nd Home: 4%
- Boat/Cruise Ship: 2%
- Other: 3%

Mississippi Gulf Coast vs. U.S. Norm
Activities and Experiences
Top Activities and Experiences

Base: Total Overnight Person-Trips

- Casino: 58%
- Shopping: 35%
- Beach/Waterfront: 29%
- Fine Dining: 23%
- Swimming: 23%
- Bar/Nightclub: 22%
- Landmark/Historic Site: 14%
- Museum: 14%
- Fishing: 11%
- National/State Park: 10%
Activities and Experiences

Base: Total Day Person-Trips

- Casino
- Beach/Waterfront
- Shopping
- Swimming
- Fine Dining
- Fishing
- Bar/Nightclub
- Museum
- Landmark/Historic Site

Percent

Mississippi Gulf Coast
U.S. Norm

Percent
Social Media Usage
Online Social Media Use by Travelers

Base: Total Overnight Person-Trips

- Used any social media for travel
- Posted travel photos/video online
- Read travel reviews
- Looked at travel photos/video online
- Accessed travel news/events/deals/promotions
- Connected with others interested in travel
- Read a travel blog
- Tweeted about a trip

Percent

Mississippi Gulf Coast | U.S. Norm
---|---
Used any social media for travel | 66 | 68
Posted travel photos/video online | 30 | 34
Read travel reviews | 25 | 28
Looked at travel photos/video online | 21 | 22
Accessed travel news/events/deals/promotions | 20 | 21
Connected with others interested in travel | 15 | 11
Read a travel blog | 12 | 16
Tweeted about a trip | 11 | 9
Online Social Media Use by Travelers

Base: Total Day Person-Trips

- Used any social media for travel: 67% (Mississippi Gulf Coast), 73% (U.S. Norm)
- Posted travel photos/video online: 32% (Mississippi Gulf Coast), 38% (U.S. Norm)
- Looked at travel photos/video online: 28% (Mississippi Gulf Coast), 30% (U.S. Norm)
- Read travel reviews: 22% (Mississippi Gulf Coast), 27% (U.S. Norm)
- Accessed travel news/events/deals/promotions: 18% (Mississippi Gulf Coast), 29% (U.S. Norm)
- Connected with others interested in travel: 16% (Mississippi Gulf Coast), 20% (U.S. Norm)
- "Followed" a destination/attraction: 11% (Mississippi Gulf Coast), 18% (U.S. Norm)
- Got travel advice: 9% (Mississippi Gulf Coast), 12% (U.S. Norm)
Visitor Volume
Total Size of Mississippi Gulf Coast Domestic Travel Market in 2015

Total Person-Trips = 12.7 Million

- Day Trips: 57% (7.2 Million)
- Overnight Trips: 43% (5.5 Million)
Size of Mississippi Gulf Coast Overnight Travel Market — Adults vs. Children

Total Overnight Person-Trips = 5.5 Million

- Adults: 79% (4.3 Million)
- Children: 21% (1.2 Million)
Mississippi Gulf Coast Overnight Travel Market — by Main Trip Purpose

Adult Overnight Person-Trips = 5.5 Million

- VFR: 1.6 Million (28%)
- Marketable: 3.6 Million (66%)
- Business-Leisure: 0.2 Million (4%)
- Business: 0.1 Million (2%)
- Others: 0.1 Million (2%)
Size of Mississippi Gulf Coast Day Travel Market — Adults vs. Children

Total Day Person-Trips = 7.2 Million

- Adults: 79% (5.7 Million)
- Children: 21% (1.5 Million)
Mississippi Gulf Coast Day Travel Market — by Trip Purpose

Adult Day Person-Trips = 7.2 Million

- Marketable: 64% (4.6 Million)
- VFR: 28% (2.0 Million)
- Business-Leisure: 2% (0.2 Million)
- Business: 6% (0.4 Million)

Total Adult Day Person-Trips = 7.2 Million
Visitor Expenditures
Overnight Trip Expenditures
Total Domestic Mississippi Gulf Coast Overnight Spending — by Sector

Total Spending = $1.069 Billion

- Lodging: 33% ($356 Million)
- Food & Beverage: 23% ($241 Million)
- Retail: 13% ($138 Million)
- Transportation: 8% ($84 Million)
- Recreation/Entertainment: 23% ($250 Million)
Average Per Person Expenditures on Domestic Overnight Trips — By Sector

Base: Total Overnight Person-Trips to Mississippi Gulf Coast
Average Per Person Expenditures on Domestic Overnight Trips — by Trip Purpose

Base: Total Overnight Person-Trips to Mississippi Gulf Coast

* Low base sizes
Average Per Party Expenditures on Domestic Overnight Trips — By Sector

Base: Total Overnight Person-Trips to Mississippi Gulf Coast

- Lodging: $171
- Restaurant Food & Beverage: $116
- Retail Purchases: $66
- Recreation/Sightseeing/Entertainment: $120
- Transportation at Destination: $40
Average Per Party Expenditures on Domestic Overnight Trips — by Trip Purpose

Base: Total Overnight Person-Trips to Mississippi Gulf Coast

* Low base sizes
Day Trip Expenditures
Total Mississippi Gulf Coast Domestic Day Trip Spending — by Sector

Total Spending = $456 Million

- Restaurant Food & Beverage: 31%, $139 Million
- Retail: 26%, $117 Million
- Recreation/Entertainment: 29%, $134 Million
- Transportation: 14%, $66 Million
Average Per Person Expenditures on Day Trips — By Sector

<table>
<thead>
<tr>
<th>Sector</th>
<th>Dollars</th>
</tr>
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<tbody>
<tr>
<td>Restaurant Food &amp; Beverage</td>
<td>$19</td>
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<tr>
<td>Retail Purchases</td>
<td>$16</td>
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<tr>
<td>Recreation/Sightseeing/Entertainment</td>
<td>$19</td>
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<tr>
<td>Transportation at Destination</td>
<td>$9</td>
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</table>

Base: Total Day Person-Trips to Mississippi Gulf Coast
Average Per Person Expenditures on Day Trips — by Trip Purpose

Base: Total Day Person-Trips to Mississippi Gulf Coast

Dollars

Leisure

Business*

$63

* Low base sizes
Average Per Party Expenditures on Day Trips — By Sector

Base: Total Day Person-Trips to Mississippi Gulf Coast

<table>
<thead>
<tr>
<th>Sector</th>
<th>Dollars</th>
</tr>
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<td>Restaurant Food &amp; Beverage</td>
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<td>Retail Purchases</td>
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<td>Recreation/Sightseeing/Entertainment</td>
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<tr>
<td>Transportation at Destination</td>
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Average Per Party Expenditures on Day Trip — by Trip Purpose

Base: Total Day Person-Trips to Mississippi Gulf Coast

* Low base sizes