Mississippi Gulf Coast 2017 Awareness and Image Research
Background and Purpose

- Longwoods International was retained to undertake an evaluation of the Mississippi Gulf Coast’s image.
- The research was designed to provide strategic image data:
  - What are the image factors and attributes that are important in destination selection?
  - What is the Mississippi Gulf Coast’s image as a travel destination versus Gulf Shores/Orange Beach, AL, Pensacola/Florida Panhandle, Daytona Beach, FL, Tampa/St. Petersburg, FL, Virginia Beach, VA.
- This information would be used to provide guidance for future advertising messaging, positioning and branding efforts.
The objectives of the research were to:

- Measure awareness of Mississippi Gulf Coast ads.
- Measure the Mississippi Gulf Coast’s image, overall and in detail, relative to its competition.
- Identify the relative importance of image factors/attributes in getting on the destination wish list.
- Measure awareness of Mississippi Gulf Coast ads.
An image study was conducted after the conclusion of the advertising period to measure awareness of specific ads and the impact of advertising awareness image.

✓ A national self-completion survey of 1,000 respondents in the advertising markets, distributed as follows:

- Outer Markets: 225
- Inner Markets: 225
- Midwest: 300
- Fly Markets: 250

✓ Respondents are members of a major online consumer research panel.
✓ Adults 18 years of age and older were randomly selected from the panel, so as to ensure a representative sample.
The survey took an average of 25 minutes to complete.

During the survey respondents were shown copies of the advertising materials, including video files of media-rich ads. This was done at the end of the survey so as not to bias earlier questions on attitudes towards Visit Mississippi Gulf Coast and other behavioral measures.

The fieldwork was conducted in October 2017.

Data were weighted on key demographic variables (region, age, sex, household income) prior to analysis to ensure that results are representative of and projectable to the traveler population in specific DMAs.

For a sample of this size, the confidence level is $+/- 3.1\%$, 19 times out of 20.
Conclusions and Recommendations
A quadrant analysis is a useful tool to assess Mississippi Gulf Coast’s image. In combination with other analyses, it helps us identify a brand’s/destination’s optimal positioning and most motivating messaging. A quadrant analysis plots the image attributes evaluated in this study in terms of your strengths and weaknesses versus how important those attributes are to travelers as they decide which destinations make it onto their “wish list.”

The normal interpretation of a quadrant analysis like this is as follows:

- Important strengths should form the core of positioning/messaging.
- Important weaknesses – communications are needed to correct misperceptions.
- Less important strengths – can add depth to the story, as “features.”
- Less important weaknesses – low priority from a communications standpoint.
The results of this research reveal some significant competitive challenges for the positioning of the Mississippi Gulf Coast in the travel marketplace:

- Unlike its main competition, the Mississippi Gulf Coast is not thought to have any unique strengths that would differentiate it from its tourism rivals.

- Although Mississippi Gulf Coast does share some strengths with other destinations, most of those strengths are relatively unimportant at the wish list stage of destination selection.

- And Mississippi Gulf Coast is believed to fall short of other potential destinations in key hot button areas.
Specifically, relative to competitors evaluated in this research and on the broad range of attributes included, Mississippi Gulf Coast does not come out ahead of the competition on any single image aspect.

Nonetheless, Mississippi Gulf Coast does have a few important strengths on which it shares the lead with others:

- Being considered an exciting place.
- Offering a comfortable atmosphere with warm, friendly people.
- Unspoiled and beautiful natural scenery.

Mississippi Gulf Coast has several less important shared strengths:

- Excellent fishing.
- Viewing wildlife/birds.
- Affordability both in terms of getting there/proximity as well as once there (dining, accommodations).
- Safety.
Conclusions and Recommendations

Versus the competitive set, Mississippi Gulf Coast has several important weaknesses:

✓ Provides a unique vacation experience.

✓ Sense of adventure.

✓ The sightseeing experience, including lots of things to see and do, truly beautiful scenery, beautiful gardens and parks, interesting cities and towns.

✓ A place I would feel welcome.

✓ Good place for families to visit, children would especially enjoy.

✓ First class hotels/resorts.
Less important weaknesses of the Mississippi Gulf Coast are:

- Great for golfers.
- Great shopping.
- Well known destination.
- Great spectator sports venues.

After completing the quadrant analysis, we examined “product delivery”, i.e., the effect of visitation on image. We did this by comparing the ratings of people who had never visited Mississippi Gulf Coast, i.e., pure image, versus the ratings of those who had visited recently. The objective here was to determine whether actual experience improves on or falls short of perceptions, and therefore whether you can safely talk about something without fear of overpromise.
The good news is that Mississippi Gulf Coast image’s is greatly affected by visitation. Once a traveler has visited Mississippi Gulf Coast, their opinion of the state soars.

In comparison to most destinations that we have measured over the years, visitation to Mississippi Gulf Coast has a far greater effect on perceptions.

For the typical destination we generally see improvements in ratings in the order of 10-15% for a few dimensions, but mainly lower shifts created by visitation.

In contrast, for Mississippi Gulf Coast, the shifts reach between 20 and 43% for many attributes including major drivers of destination interest.

These shifts tell us that people are genuinely surprised when they come to the region, and suggest that the main issue is lack of awareness, not product absence or shortcomings.
Another beneficial outcome of visitation by tourists is positive impacts on your image with respect to economic development. On every individual aspect tested in this research (ranging from being thought of as great place to live to starting a career or business in the state), visitation significantly improved people’s image of Mississippi Gulf Coast.

When we look across all of these measures, we conclude that:

✓ The core positioning for Mississippi Gulf Coast should be excitement.

✓ It is one of the most important drivers of destination interest in your competitive set.

✓ Even though you are not leading yet in this area, you are considered the equal of others in top spot, and your visitors are saying that you can talk about excitement without fear of overpromise, because you are delivering on it.
Conclusions and Recommendations

➢ Although your imagery identifies some high points like unspoiled natural scenery, fishing, safe/friendly/comfortable atmosphere, etc., the excitement message needs to be developed around and supported by more than singular features:

✓ to reinforce the important notion of “lots to see and do”

✓ and to counter areas of image weakness, particularly regarding family suitability and uniqueness

➢ Resist the temptation to focus singularly on the outdoor experience, since it is far lower in importance than excitement and more urban aspects of travel.

➢ Incorporating images of your natural scenic beauty plus urban pursuits, and other unique/interesting aspects of your tourism product would help you convey the excitement and variety themes, while choice of actors and situations/scripting can help reinforce your friendly, safe atmosphere and family orientation.
Main Findings: Advertising Impacts
Advertising Awareness
Approximately one third (33%) of travelers in Visit Mississippi Gulf Coast’s core markets recalled seeing at least one Visit Mississippi Gulf Coast tourism ad among the ads they were exposed to in the survey.

Ad awareness was higher among older markets than newer markets, especially the “Outer” markets. Markets that received television had much higher awareness than non-television markets. Those markets that received digital advertising had higher awareness than non-digital market, but the differences were not as large as television.

In the markets where television was shown, television had the highest awareness among the various mediums (49%). For the markets where digital ads were shown, the awareness was 27%. All markets received print and social media, the awareness was 24% and 18% respectfully.

The ads with the highest level of recall were the television ads of “Oyster” and “Bonfire.”
Awareness of the Ad Campaign

Aware*
33%

Unaware
67%

*Saw at least one ad
Awareness* by Market

*Saw at least one ad

Percent

<table>
<thead>
<tr>
<th>Market</th>
<th>Total</th>
<th>Fly Markets</th>
<th>Midwest Markets</th>
<th>Outer Markets</th>
<th>Inner Markets</th>
</tr>
</thead>
<tbody>
<tr>
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<td>33</td>
<td>26</td>
<td>28</td>
<td>50</td>
<td>34</td>
</tr>
</tbody>
</table>

* Saw at least one ad
Awareness* by Market – by Age of Advertising

*Saw at least one ad
Awareness* by Market – by TV or Digital

*Saw at least one ad
Advertising Awareness* by Medium

* Saw at least one ad
** In markets seen

- Aware of any ad: 33%
- Any TV**: 49%
- Any Digital**: 27%
- Any Print: 24%
- Any Social Media: 18%
Print Creative

Print Compilation #1

Print Compilation #2

Print Compilation #3
Awareness of Individual Ads* — Print

*Based on markets where shown
Awareness of Individual Ads* — Social Media

- Any Social Media: 18%
- Beach Itinerary Compilation: 15%
- Culture Itinerary Compilation: 12%

*Based on markets where shown
Digital Creative

Beach Compilation

Culture Compilation

Golf Compilation

Fishing Compilation
Awareness of Individual Ads* — Digital

- any Digital: 27%
- Beach Compilation: 16%
- Culture Compilation: 13%
- Golf Compilation: 13%
- Fishing Compilation: 13%

*Based on markets where shown
Awareness of Individual Ads* — TV

*Based on markets where shown
Advertising Impact on Short-of-Sales Measures
The campaign had a positive impact on travelers’ perceptions of Visit Mississippi Gulf Coast:

- People exposed to the campaign gave Visit Mississippi Gulf Coast substantially higher rating scores than those unfamiliar with the campaign for the general overall statement “Visit Mississippi Gulf Coast is a place I would really enjoy visiting” and the notion that a vacation in Visit Mississippi Gulf Coast provides “excellent value for the money.”

- For the more detailed attributes, we find that the campaign did a very good job of improving people’s perceptions of Visit Mississippi Gulf Coast for every image dimension evaluated.
The advertising had greatest impact on perceptions related to:

- Climate especially, a good contrast of seasons.
- Entertainment, such as shopping, theater/arts, events such as festivals, etc.
- Having warm, friendly people
- Having great spectator sports venues and being good for golfers
- Unique, especially a unique vacation experience, beautiful scenery.

In addition to changing perceptions of Visit Mississippi Gulf Coast, the advertising created greater interest in traveling to the Mississippi Gulf Coast in the next 12 months. Those aware of the advertising are 2 ½ times more likely to visit.
Advertising Impact on Visit Mississippi Gulf Coast’s Overall Image

“A place I’d really enjoy visiting”

“A excellent value for the money”

<table>
<thead>
<tr>
<th>Aware*</th>
<th>Unaware</th>
<th>Aware*</th>
<th>Unaware</th>
</tr>
</thead>
<tbody>
<tr>
<td>58</td>
<td>41</td>
<td>55</td>
<td>35</td>
</tr>
</tbody>
</table>

*Saw at least one ad.

**“Percent who strongly agree” is the percent of respondents giving a statement an agree/disagree rating of 8, 9 or 10 out of 10
Advising Impact on Visit Mississippi Gulf Coast’s Image

- Exciting
- Adult Destination
- Unique
- Worry Free
- Family Atmosphere
- Sightseeing
- Luxurious
- Sports & Recreation
- Entertainment
- Popular
- Climate
- Affordable

Percent Who Strongly Agree

- Aware
- Unaware

35
Image Attributes Most Impacted by Advertising

A good contrast of seasons
Interesting festivals/fairs/events
Popular with vacationers
Warm, friendly people
Great spectator sports venues
Great shopping
Great for golfers
Provides a unique vacation experience
Excellent museums/galleries
Truly beautiful scenery
A place I would feel welcome
A great place to experience fine dining

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
Image Attributes Most Impacted by Advertising (Cont’d)

- Great for exploring nature
- Children would especially enjoy this place
- Well-known landmarks
- A place where I would feel comfortable
- A vacation there is a real adventure
- Unique scenery unlike anywhere else
- Beautiful gardens and parks
- Good place for families to visit
- Great for outdoor adventure sports
- Exciting nightlife/entertainment/shows
- Great live music
- Easy to get to

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
Image Attributes Most Impacted by Advertising (Cont’d)

Natural, unspoiled scenic beauty 16
Affordable accommodations 16
Great for motorcycle touring 15
A place everyone should visit at least once 15
Good for couples 15
Excellent climate overall 14
Excellent fishing 14
Affordable to eat there 14
Affordable to get to 14
Just the right distance for a weekend getaway 14
Safe in tourist areas 14
Lots of things to see and do 14

Difference in Percent Who Strongly Agree

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
Image Attributes Most Impacted by Advertising (Cont’d)

- Well-known destination: 13
- Is an interesting place: 13
- A fun place for a vacation: 13
- Interesting historic sites: 13
- I often notice advertising for this place: 13
- An exciting place: 12
- First-class hotels/resorts: 12
- Good for viewing wildlife/birds: 12
- Great for sightseeing: 11
- Interesting cities and towns: 11
- Not too far away to consider for a vacation: 11
- Offers a variety of dining options: 11
- Good for an adult vacation: 9
- Good place to relax/escape from hectic life: 8

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
Impact of Advertising on Intent to Visit Mississippi Gulf Coast in the Next 12 Months

*Saw at least one ad.
Main Findings: Visit Mississippi Gulf Coast’s Overall Position in the Target Market
Destination
Visitation
& Interest
Mississippi Gulf Coast is slightly above the other studied destination as a place they visited in the past two years. About one-third of the travelers plan to visit the Mississippi Gulf Coast in the next year.

Slightly less than half (47%) of the travelers have ever visited the Mississippi Gulf Coast. This level is only exceed by Tampa/St. Petersburg, Daytona Beach, and Pensacola/Panhandle.

Although the past two year visitation is similar for old and new advertised markets, the likelihood of future visitation is much greater among the new markets.
Destinations Ever Visited

- Tampa/St. Petersburg: 60%
- Daytona Beach: 58%
- Pensacola/Panhandle: 54%
- MS Gulf Coast: 47%
- Virginia Beach: 39%
- Gulf Shores/Orange Beach: 35%

Percent
Destinations Visited in Past 2 Years

- MS Gulf Coast: 22%
- Gulf Shores/Orange Beach: 21%
- Pensacola/Panhandle: 21%
- Virginia Beach: 19%
- Tampa/St. Petersburg: 18%
- Daytona Beach: 13%
Destinations Intend to Visit in Next Two Years

- Pensacola/Panhandle: 38%
- MS Gulf Coast: 34%
- Tampa/St. Petersburg: 34%
- Daytona Beach: 34%
- Gulf Shores/Orange Beach: 33%
- Virginia Beach: 24%
Mississippi Gulf Coast Visitation by Market – by Age of Advertising

- **Ever**
  - Total: 47
  - New Markets: 34
  - Old Markets: 68

- **Past 2 Years**
  - Total: 22
  - New Markets: 23
  - Old Markets: 21

- **Intent to Visit Next Two Years**
  - Total: 34
  - New Markets: 26
  - Old Markets: 49
Destination Hot Buttons
Travel Motivators

➢ Respondents evaluated the image of Visit Mississippi Gulf Coast and five other destinations on an overall basis and on a series of 52 additional detailed image attributes.

➢ To determine hot buttons for getting on the “wish list”, we measured the degree of association between the destinations’ overall image and their ratings on individual attributes:

  ✓ For this purpose, we used the main overall measure included in the image battery – “A place I would really enjoy visiting” – as the predictor variable.

➢ Then, in order to better communicate the results, the data were grouped into broader categories or factors.

➢ For a destination in this competitive set to get on travelers’ consideration list, it must, first and foremost, be perceived to:

  ✓ Be **exciting** – being seen as exciting means being a must-see place to visit, offering many once-in-a-lifetime experiences and a real sense of fun and adventure.

  ✓ Be suitable for **adults** and couples – which is logical, since they are paying for the vacation.

  ✓ **Uniqueness**, including the scenery, local food, people and culture.
Travel Motivators

There are several factors that individually are of moderate importance, but that in combination define the excitement and suitability for adults that attracts vacationers to a destination:

- A great **family atmosphere** – with things to see and do that kids would especially enjoy.
- Great **sightseeing**, including lots to see and do, beautiful scenery, landmarks, walkability, parks, museums, etc.
- The availability of **luxurious** accommodations and dining.
- A safe, welcoming and **worry-free** environment
Lower priorities are:

- **Sports and recreation**, including organized activities (e.g., golf, fishing), great spectator venues, motorcycle touring, and other outdoor recreation.
- The opportunities for **entertainment**, e.g., shopping, theater, nightclubs, live music, professional sports events.
- **Popularity**, i.e., is the place popular among vacationers? Is it well-known? Do you often see advertising or favorable reviews?
- **Climate**.

**Affordability** is also relatively unimportant at the wish list stage:

- But it tends to rise to the top of the list the closer one gets to closing the sale, as travel distance and pocketbook issues come into play.
- Affordability includes both the cost of getting there/distance to market and costs once you have arrived, such as food and lodging.
Travel Motivators

* A measure of the degree of association between each factor and whether destination is a place “I would really enjoy visiting.”
### Top 10 Hot Buttons

<table>
<thead>
<tr>
<th>Hot Buttons</th>
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<tbody>
<tr>
<td>A place where I would feel comfortable</td>
<td></td>
</tr>
<tr>
<td>A fun place for a vacation</td>
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<tr>
<td>An exciting place</td>
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<tr>
<td>Provides a unique vacation experience</td>
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<tr>
<td>Truly beautiful scenery</td>
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<tr>
<td>A place everyone should visit at least once</td>
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<tr>
<td>Is an interesting place</td>
<td></td>
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<tr>
<td>A place I would feel welcome</td>
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<tr>
<td>Great for sightseeing</td>
<td></td>
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<tr>
<td>Interesting cities and towns</td>
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</tbody>
</table>
Mississippi Gulf Coast’s Image vs. Competition
Mississippi Gulf Coast’s Image

- Mississippi Gulf Coast has a positive overall image among travelers:
  - Across the markets survey, almost half (47%) rated Mississippi Gulf Coast very favorably as a destination they “would really enjoy visiting.”
  - Virtually the same as indicated for the other destinations studied.

- On the other overall image measure, perceptions for “value for money”, the rank ordering is quite different:
  - Mississippi Gulf Coast, Pensacola/Florida Panhandle and Gulf Shores/Orange Beach are tied at the top of the list and are thought to offer somewhat more value than Daytona Beach, Tampa/St. Petersburg, and Virginia Beach.
When comparing Mississippi Gulf Coast’s image versus the image of the combined competition, Mississippi Gulf Coast’s top image strengths are related to:

- Excellent fishing.
- Just the right distance for a weekend getaway.
- Affordable to eat there.
- An exciting place.
- Great for exploring nature.

Among travelers, only being “an exciting place” is a top predictor of destination interest.
Mississippi Gulf Coast’s main perceived weaknesses relate to:

- Good for families.
- Being well known.
- Great shopping.
- Being a real adventure.
- Lots of things to see and do.

None of these weaknesses are one of the most important drivers of destination choice.
When we compare ratings of Mississippi Gulf Coast versus the individual competitors, there are several dimensions on which Mississippi Gulf Coast appears to have a unique advantage over most of the competitors evaluated:

- Excellent fishing (except Gulf Shores/Orange Beach).
- Being exciting place (except for Gulf Shores and Pensacola/Florida Panhandle).
- Being affordable (except for Gulf Shores and Pensacola/Florida Panhandle).

The Mississippi Gulf Coast is thought to be lower than all the competitors for:

- Suitability for children.
- Great for golfers.
- Being a well-known destination.
Mississippi Gulf Coast’s Overall Image vs. Competition — “A Place I Would Really Enjoy Visiting”

<table>
<thead>
<tr>
<th>Location</th>
<th>Percent Who Strongly Agree</th>
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<tbody>
<tr>
<td>Pensacola/ Panhandle</td>
<td>50</td>
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<tr>
<td>Virginia Beach</td>
<td>49</td>
</tr>
<tr>
<td>Daytona Beach</td>
<td>48</td>
</tr>
<tr>
<td>Gulf Shores/ Orange Beach</td>
<td>47</td>
</tr>
<tr>
<td>MS Gulf Coast</td>
<td>47</td>
</tr>
<tr>
<td>Tampa/ St. Petersburg</td>
<td>45</td>
</tr>
</tbody>
</table>
“Excellent Value For the Money”

Percent Who Strongly Agree

- Pensacola/ Panhandle: 43
- MS Gulf Coast: 42
- Gulf Shores/ Orange Beach: 41
- Daytona Beach: 37
- Tampa/ St. Petersburg: 35
- Virginia Beach: 35
Mississippi Gulf Coast’s Overall Image vs. Competition

- Exciting: MS Gulf Coast 46, Competitors* 49
- Adult Destination: MS Gulf Coast 40, Competitors* 50
- Unique: MS Gulf Coast 40, Competitors* 50
- Worry Free: MS Gulf Coast 41, Competitors* 50
- Family Atmosphere: MS Gulf Coast 41, Competitors* 50
- Sightseeing: MS Gulf Coast 41, Competitors* 50
- Luxurious: MS Gulf Coast 46, Competitors* 50
- Sports & Recreation: MS Gulf Coast 37, Competitors* 45
- Entertainment: MS Gulf Coast 36, Competitors* 42
- Popular: MS Gulf Coast 38, Competitors* 43
- Climate: MS Gulf Coast 38, Competitors* 41
- Affordable: MS Gulf Coast 38, Competitors* 41

* Includes Gulf Shores/Orange Beach, Pensacola/Panhandle, Daytona Beach, Tampa/St. Petersburg, and Virginia Beach
Mississippi Gulf Coast’s Image vs. Competition — Exciting

Percent Who Strongly Agree

- **Exciting**: 46% (MS Gulf Coast) vs. 49% (Competitors)
- **A fun place for a vacation**: 49% (MS Gulf Coast) vs. 52% (Competitors)
- **An exciting place**: 50% (MS Gulf Coast) vs. 55% (Competitors)
- **A place everyone should visit at least once**: 44% (MS Gulf Coast) vs. 49% (Competitors)
- **A vacation there is a real adventure**: 37% (MS Gulf Coast) vs. 44% (Competitors)
Mississippi Gulf Coast’s Image vs. Competition — Exciting

<table>
<thead>
<tr>
<th>Location</th>
<th>Percent Who Strongly Agree</th>
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<tbody>
<tr>
<td>Gulf Shores/Orange Beach</td>
<td>51</td>
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<tr>
<td>Pensacola/Panhandle</td>
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<tr>
<td>Daytona Beach</td>
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<tr>
<td>Virginia Beach</td>
<td>47</td>
</tr>
<tr>
<td>Tampa/St. Petersburg</td>
<td>47</td>
</tr>
<tr>
<td>MS Gulf Coast</td>
<td>46</td>
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</tbody>
</table>
Mississippi Gulf Coast’s Image vs. Competition — Adult Destination

- Adult Destination: 54% (MS Gulf Coast), 57% (Competitors)
- Good for an adult vacation: 56% (MS Gulf Coast), 57% (Competitors)
- Good for couples: 53% (MS Gulf Coast), 56% (Competitors)
Mississippi Gulf Coast’s Image vs. Competition — Adult Destination

- Gulf Shores/Orange Beach: 60%
- Daytona Beach: 60%
- Pensacola/Panhandle: 57%
- Virginia Beach: 56%
- MS Gulf Coast: 54%
- Tampa/St. Petersburg: 52%
Mississippi Gulf Coast’s Image vs. Competition — Unique

- **Unique scenery unlike anywhere else**: 36% (MS Gulf Coast), 37% (Competitors)
- **Provides a unique vacation experience**: 40% (MS Gulf Coast), 42% (Competitors)
- **Is an interesting place**: 43% (MS Gulf Coast), 46% (Competitors)

Percent Who Strongly Agree

---

MS Gulf Coast | Competitors
---|---
40 | 42
40 | 44
43 | 46
37 | 36
Visit Mississippi Gulf Coast’s Image vs. Competition — Unique

- Daytona Beach: 43
- Pensacola/Panhandle: 43
- Gulf Shores/Orange Beach: 42
- Tampa/St. Petersburg: 42
- MS Gulf Coast: 40
- Virginia Beach: 40

Percent Who Strongly Agree
Mississippi Gulf Coast’s Image vs. Competition — Worry-free

- Worry Free
- A place where I would feel comfortable
- A place I would feel welcome
- Good place to relax/escape from hectic life
- Warm, friendly people
- Safe in tourist areas

<table>
<thead>
<tr>
<th></th>
<th>MS Gulf Coast</th>
<th>Competitors</th>
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</thead>
<tbody>
<tr>
<td>Worry Free</td>
<td>50</td>
<td>50</td>
</tr>
<tr>
<td>A place where I would feel comfortable</td>
<td>49</td>
<td>47</td>
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<tr>
<td>A place I would feel welcome</td>
<td>49</td>
<td>53</td>
</tr>
<tr>
<td>Good place to relax/escape from hectic life</td>
<td>48</td>
<td>49</td>
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<tr>
<td>Warm, friendly people</td>
<td>47</td>
<td>51</td>
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<tr>
<td>Safe in tourist areas</td>
<td>54</td>
<td>51</td>
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Mississippi Gulf Coast’s Image vs. Competition — Worry-free

<table>
<thead>
<tr>
<th>Beach Region</th>
<th>Percent Who Strongly Agree</th>
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<tbody>
<tr>
<td>Gulf Shores/Orange Beach</td>
<td>53</td>
</tr>
<tr>
<td>Pensacola/Panhandle</td>
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<td>MS Gulf Coast</td>
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<td>Virginia Beach</td>
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<tr>
<td>Daytona Beach</td>
<td>48</td>
</tr>
<tr>
<td>Tampa/St. Petersburg</td>
<td>46</td>
</tr>
</tbody>
</table>
Mississippi Gulf Coast’s Image vs. Competition — Family Atmosphere

- Family Atmosphere
  - MS Gulf Coast: 41%
  - Competitors: 53%

- Good place for families to visit
  - MS Gulf Coast: 40%
  - Competitors: 47%

- Children would especially enjoy this place
  - MS Gulf Coast: 41%
  - Competitors: 58%
Mississippi Gulf Coast’s Image vs. Competition — Family Atmosphere

<table>
<thead>
<tr>
<th>Location</th>
<th>Percent Who Strongly Agree</th>
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</thead>
<tbody>
<tr>
<td>Daytona Beach</td>
<td>61</td>
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<td>Pensacola/Panhandle</td>
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<td>Tampa/St. Petersburg</td>
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<tr>
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<td>Virginia Beach</td>
<td>49</td>
</tr>
<tr>
<td>MS Gulf Coast</td>
<td>41</td>
</tr>
</tbody>
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Mississippi Gulf Coast’s Image vs. Competition — Sightseeing

Sightseeing

- Truly beautiful scenery
- Great for sightseeing
- Interesting cities and towns
- Beautiful gardens and parks
- Natural, unspoiled scenic beauty
- Excellent museums/galleries
- Lots of things to see and do
- Interesting historic sites
- Well-known landmarks

Percent Who Strongly Agree

MS Gulf Coast

Competitors
Mississippi Gulf Coast’s Image vs. Competition — Sightseeing

- Tampa/St. Petersburg: 44%
- Virginia Beach: 44%
- Pensacola/Panhandle: 43%
- Gulf Shores/Orange Beach: 42%
- Daytona Beach: 42%
- MS Gulf Coast: 41%
Mississippi Gulf Coast’s Image vs. Competition
— Luxurious

<table>
<thead>
<tr>
<th>Perception</th>
<th>MS Gulf Coast</th>
<th>Competitors</th>
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<td>A great place to experience fine dining</td>
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<td>45</td>
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<tr>
<td>First-class hotels/resorts</td>
<td>48</td>
<td>53</td>
</tr>
<tr>
<td>Offers a variety of dining options</td>
<td>48</td>
<td>51</td>
</tr>
</tbody>
</table>

Percent Who Strongly Agree
Mississippi Gulf Coast’s Image vs. Competition — Luxurious

The chart shows the percent who strongly agree with the statement about each location:

- Tampa/St. Petersburg: 52%
- Daytona Beach: 51%
- Pensacola/Panhandle: 49%
- Virginia Beach: 48%
- Gulf Shores/Orange Beach: 48%
- MS Gulf Coast: 46%
Mississippi Gulf Coast’s Image vs. Competition — Sports & Recreation

- Sports & Recreation: 45%
- Great for exploring nature: MS Gulf Coast 39%, Competitors 44%
- Good for viewing wildlife/birds: MS Gulf Coast 43%, Competitors 47%
- Excellent fishing: MS Gulf Coast 49%, Competitors 51%
- Great for outdoor adventure sports: MS Gulf Coast 46%, Competitors 43%
- Great for golfers: MS Gulf Coast 40%, Competitors 51%
- Great for motorcycle touring: MS Gulf Coast 35%, Competitors 40%
Visit Mississippi Gulf Coast’s Image vs. Competition — Sports & Recreation

Percent Who Strongly Agree

- Gulf Shores/Orange Beach: 47%
- Pensacola/Panhandle: 47%
- MS Gulf Coast: 45%
- Tampa/St. Petersburg: 44%
- Daytona Beach: 42%
- Virginia Beach: 41%
Mississippi Gulf Coast’s Image vs. Competition — Entertainment

- Entertainment: MS Gulf Coast 37%, Competitors 42%
- Interesting festivals/fairs/events: MS Gulf Coast 40%, Competitors 40%
- Great live music: MS Gulf Coast 43%, Competitors 43%
- Exciting nightlife/entertainment/shows: MS Gulf Coast 42%, Competitors 45%
- Great shopping: MS Gulf Coast 36%, Competitors 45%
Mississippi Gulf Coast’s Image vs. Competition — Entertainment

- Tampa/St. Petersburg: 47
- Daytona Beach: 46
- Gulf Shores/Orange Beach: 39
- Virginia Beach: 38
- Pensacola/Panhandle: 38
- MS Gulf Coast: 37

Percent Who Strongly Agree
Mississippi Gulf Coast’s Image vs. Competition — Popular

- Popular: MS Gulf Coast 36, Competitors 43
- Popular with vacationers: MS Gulf Coast 25, Competitors 31
- Well-known destination: MS Gulf Coast 46, Competitors 58
- I often notice advertising for this place: MS Gulf Coast 35, Competitors 40

Percent Who Strongly Agree

MS Gulf Coast

Competitors

80
Mississippi Gulf Coast’s Image vs. Competition — Popular

- Daytona Beach: 49%
- Pensacola/Panhandle: 43%
- Virginia Beach: 43%
- Tampa/St. Petersburg: 42%
- Gulf Shores/Orange Beach: 40%
- MS Gulf Coast: 36%
Mississippi Gulf Coast’s Image vs. Competition — Climate

- Climate: 39% (MS Gulf Coast), 41% (Competitors)
- Excellent climate overall: 50% (MS Gulf Coast), 51% (Competitors)
- A good contrast of seasons: 28% (MS Gulf Coast), 30% (Competitors)
Mississippi Gulf Coast’s Image vs. Competition — Climate

Percent Who Strongly Agree

- Virginia Beach: 43
- Daytona Beach: 42
- Pensacola/Panhandle: 42
- Gulf Coast: 39
- Gulf Shores/Orange Beach: 38
- Tampa/St. Petersburg: 38
Mississippi Gulf Coast’s Image vs. Competition — Affordable

- Affordable: 41%
- Easy to get to: 45%
- Affordable to get to: 41%
- Affordable accommodations: 38%
- Affordable to eat there: 43%
- Not too far away to consider for a vacation: 45%
- Just the right distance for a weekend getaway: 42%

Percent Who Strongly Agree

- MS Gulf Coast
- Competitors
Mississippi Gulf Coast’s Image vs. Competition — Affordable
Mississippi Gulf Coast’s Image Strengths vs. Competition

- Excellent fishing: 7
- Just the right distance for a weekend getaway: 5
- Affordable to eat there: 5
- An exciting place: 5
- Great for exploring nature: 5

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
Children would especially enjoy this place
Well-known destination
Great for golfers
Great shopping
Great spectator sports venues
A vacation there is a real adventure
Lots of things to see and do
Good place for families to visit
Popular with vacationers
Great for motorcycle touring
First-class hotels/resorts
I often notice advertising for this place

Difference in Percent Who Strongly Agree
Visit Mississippi Gulf Coast’s Product Delivery
When we compare the image ratings of people who have not visited the Mississippi Gulf Coast recently versus the ratings of those who have visited in the past two years, we have a measure of “product delivery”, i.e., the relative satisfaction of the visitor group in comparison to the “pure image” of the non-visitors.

What is particularly noteworthy about the two sets of ratings is the sheer size of the differences between them:

✓ On almost all variables, there is at least a 10% “lift” created by experience visiting the Mississippi Gulf Coast, and for about half of the attributes, the differences were between 20% and 30%.

✓ This means that visitors were genuinely surprised by what they found and experienced in the Mississippi Gulf Coast, in a very positive way.
From this analysis we find that people who have experienced the Mississippi Gulf Coast recently were especially impressed with:

✓ Affordability – easy to get there, affordable accommodations and dining.
✓ Worry-free – easy to get around, safe, friendly and good place to relax.
✓ Excitement – being a place that is exciting and everyone should visit at least once.
✓ Suitability for adults.
✓ Popular with vacationers.

Among the dimensions evaluated, there no areas where visitors felt the Mississippi Gulf Coast failed to live up to expectations.
Exciting Adult Destination Unique Worry Free Family Atmosphere Sightseeing Luxurious Sports & Recreation Entertainment Popular Climate Affordable

Percent Who Strongly Agree

* Visited in the past 2 years

Recent Visitors* Never Visited

Mississippi Gulf Coast’s Product vs. Image
Top Product Strengths vs. Image

- Affordable to get to: 43%
- Not too far away to consider for a vacation: 42%
- Just the right distance for a weekend getaway: 41%
- Easy to get to: 32%
- A place everyone should visit at least once: 30%
- A place I would feel welcome: 29%
- An exciting place: 29%
- Popular with vacationers: 28%
- Warm, friendly people: 28%
- A place where I would feel comfortable: 28%
- Exciting nightlife/entertainment/shows: 25%
- Great for motorcycle touring: 25%
- Good for an adult vacation: 25%

Difference in Percent Who Strongly Agree

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
Safe in tourist areas 24
Affordable to eat there 24
Good for couples 23
Excellent museums/galleries 23
Well-known destination 23
Well-known landmarks 22
Great live music 21
Good place for families to visit 21
Affordable accommodations 21
Interesting historic sites 21
Offers a variety of dining options 21
A fun place for a vacation ▶ 20
Great shopping 19

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
A vacation there is a real adventure
Good place to relax/escape from hectic life
Excellent fishing
Children would especially enjoy this place
First-class hotels/resorts
Great for exploring nature
Interesting festivals/fairs/events
Great for golfers
A great place to experience fine dining
Is an interesting place
Great spectator sports venues
I often notice advertising for this place
Excellent climate overall

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
Top Product Strengths vs. Image (Cont’d)

- Interesting cities and towns
- Natural, unspoiled scenic beauty
- Unique scenery unlike anywhere else
- Lots of things to see and do
- Truly beautiful scenery
- Great for sightseeing
- Provides a unique vacation experience
- Great for outdoor adventure sports
- Good for viewing wildlife/birds
- A good contrast of seasons
- Beautiful gardens and parks

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
THERE WERE NO SIGNIFICANT PERCEIVED PRODUCT WEAKNESSES VS. IMAGE
Halo Effect on Economic Development Image
➢ Research has long demonstrated that tourism advertising and the visitation it inspires have a positive impact on consumers’ image of destinations as a place for leisure travel and recreation.

➢ Applying the psychological concept of the “halo effect” to tourism promotion advertising, Longwoods set out to determine if gains in image for Mississippi Gulf Coast from its tourism advertising would extend beyond the appeal as a place to visit. Could it be that economic objectives could also be achieved, such as viewing Mississippi Gulf Coast more favorably as a place to live, work, start a business, attend college, purchase a vacation home and retire?

➢ Longwoods International has conducted this research for multiple state and city destinations across the U.S since 2014.
The research compared consumers’ ratings of Mississippi Gulf Coast on economic development image attributes by those who had not seen the spring/summer campaign or visited Mississippi Gulf Coast with those who did see the tourism ads and/or visited.

In almost every case, Visit Mississippi Gulf Coast’s tourism advertising and subsequent visitation significantly improved the image of Mississippi Gulf Coast for a wide range of economic development objectives.
Specifically, the Visit Mississippi Gulf Coast tourism advertising campaign created especially strong image lift in three areas:

- Those who saw the advertising were 142% more likely than those not exposed to regard Mississippi Gulf Coast as a good place to start a business, as a good place to start a career (123% lift), and as a good place to attend college (120% lift).

To a somewhat lesser degree, the advertising also boosted people’s impressions of Mississippi Gulf Coast as a good place to live (79% lift), as a good place to retire (79%), and as good place to buy a vacation home (66%).

Actual visitation produced a positive, albeit it not as strong an effect on people’s image of Mississippi Gulf Coast on the economic development “indicators”:

- Strongest lift on the “a good place to live” attribute.
- Good lift as well on the remaining attributes except “attending college.”
For each economic development objective, the most dramatic improvement in image was among those consumers who were both exposed to the advertising campaign message and who also visited Mississippi Gulf Coast.

The effect of advertising plus visitation was generally more than additive, improving consumers’ perceptions of Mississippi Gulf Coast by considerably more than the sum of their lifts in each area.

For example, ad exposure plus visitation improved people’s rating of Mississippi Gulf Coast as a place to start a business or a career by more than 200%, and their rating of Mississippi Gulf Coast on each of the other dimensions by more than 100%.
Impact of *Tourism Ad Awareness* on Mississippi Gulf Coast’s Economic Development Image

- A good place to live: +79%
- A good place to start a career: +123%
- A good place to start a business: +142%
- A good place to attend college: +120%
- A good place to purchase a vacation home: +66%
- A good place to retire: +70%
Impact of Visitation on Mississippi Gulf Coast’s Economic Development Image

A good place to live
A good place to start a career
A good place to start a business
A good place to attend college
A good place to purchase a vacation home
A good place to retire

Percent Who Strongly Agree

Past 2 Years
Never

+89%
+78%
+76%
+34%
+67%
+78%
Impact of Ad Awareness plus Visitation on Mississippi Gulf Coast’s Economic Development Image

- A good place to live: +176%
- A good place to start a career: +224%
- A good place to start a business: +243%
- A good place to attend college: +161%
- A good place to purchase a vacation home: +133%
- A good place to retire: +159%

Legend:
- Aware + Visited
- Unaware + Non-Visitor
A Good Place to Live

% Image Lift for Mississippi Gulf Coast

Advertising: 79
Visitation: 89
Advertising Plus Visitation: 176
A Good Place To Start A Career

% Image Lift for Mississippi Gulf Coast

- Advertising: 123
- Visitation: 78
- Advertising Plus Visitation: 224
A Good Place to Start a Business

% Image Lift for Mississippi Gulf Coast

Advertising: 142
Visitation: 76
Advertising Plus Visitation: 243
A Good Place to Attend College

% Image Lift for Mississippi Gulf Coast

- Advertising: 120
- Visitation: 34
- Advertising Plus Visitation: 161
A Good Place to Purchase a Vacation Home

% Image Lift for Mississippi Gulf Coast

- Advertising: 66
- Visitation: 67
- Advertising Plus Visitation: 133
A Good Place to Retire

% Image Lift for Mississippi Gulf Coast

- Advertising: 70
- Visitation: 78
- Advertising Plus Visitation: 159

Percent
Appendix: Visit Mississippi Gulf Coast’s Image Strengths & Weaknesses vs. Individual Competitors
Among the destinations evaluated in this study, no one destination emerges as the leader for every dimension. The following summarizes the strengths and weaknesses of the 5 competitors evaluated in this study:

**Gulf Shores/Orange Beach**

- Gulf Shores/Orange Beach leads the other destinations in the competitive set for being considered an exciting and interesting place, an adult destination, a good place to relax, great for exploring nature and outdoor adventure sports.
- Travelers think Gulf Shores/Orange Beach would be better than the Mississippi Gulf Coast in each of these areas, plus:
  - Other aspects of excitement – fun, adventure, being a must see destination
  - Good for families/kids
  - Being a well known destination
  - Great for golfers
  - Having first class hotels/resorts
  - Great shopping

- The Mississippi Gulf Coast has no significant strengths versus Gulf Shores/Orange Beach.
Pensacola/Florida Panhandle
➢ Pensacola/Florida Panhandle’s unique edge in this competitive sets is related to perceptions for being a fun place, offering a sense of welcome
➢ Pensacola/Florida Panhandle is given the advantage over Mississippi Gulf Coast for:
  ✓ Being a must see destination, and offering a sense of adventure – aspects of the excitement factor
  ✓ Suitability for families/kids
  ✓ Great for golfers
  ✓ Great for motorcycle touring
  ✓ Popularity with vacationers
  ✓ Lots of things to see and do including great shopping
  ✓ A place to relax
➢ The Mississippi Gulf Coast is felt to be better than Pensacola/Florida Panhandle for fishing.
Daytona Beach

Daytona Beach’s unique perceptual edge in this competitive set lies in being thought of as a place everyone must visit at least once in their lifetime, offering a sense of adventure and a unique experience, with plenty of things that kids would enjoy, interesting events/festivals, suitability for motorcycle touring, great spectator sports venues, great climate, and overall popularity as a destination.

Compared to Mississippi Gulf Coast, Daytona Beach is also given the advantage for:

✓ Suitability for couples and families
✓ First class hotels/resorts.
✓ Lots of things to see and do, including well-known landmarks, great shopping, golf and exciting nightlife/entertainment/shows
✓ A sense of welcome
On the other hand, Mississippi Gulf Coast is considered better than Daytona Beach for:

✓ Being an exciting place

✓ The natural experience, including fishing; outdoor adventure sports; having natural, unspoiled beauty; being great for exploring nature; and wildlife viewing/bird-watching

✓ Historic sites

✓ Warm friendly people

✓ Good place to relax

✓ Affordability and proximity for travelers
Tampa/St. Petersburg

➢ Travelers give Tampa/St. Petersburg the lead over this entire competitive set for having beautiful gardens and parks, having lots to see and do, famous landmarks, great museums/galleries, great entertainment/nightlife/live music, good shopping, golf, and great dining

➢ Tampa/St. Petersburg is also felt to edge out the Mississippi Gulf Coast for a few additional elements:
  ✓ Great spectator sports venues.
  ✓ Suitability for families/kids
  ✓ Being a well-known destination
  ✓ Being a real adventure

➢ Visit Mississippi Gulf Coast tends to get better ratings than Tampa for having warm, friendly people, excitement, affordability, natural/unspoiled beauty, and excellent fishing.
Image of the Competition

Virginia Beach

➢ Virginia Beach surpasses all of the competitive set for perceptions related to offering great sightseeing including interesting historic sites,

➢ Virginia Beach is rated as being better than Mississippi Gulf Coast for some additional aspects including children especially enjoying the place, being a well-known destination/more popular, well known landmarks, golf, shopping, museums/galleries, being a real adventure, and popular with vacationers. People also believe Virginia Beach has a better contrast among the seasons.

➢ Mississippi Gulf Coast shows image strength versus Virginia Beach for excitement, unspoiled scenic beauty, affordability, outdoor activities such as exploring nature, viewing wildlife/birds, adventure sports and fishing.
THERE WERE NO SIGNIFICANT PERCEIVED IMAGE STRENGTHS VS. GULF SHORES/ORANGE BEACH
Well-known destination
Good place for families to visit

▶ Is an interesting place
Children would especially enjoy this place

▶ Great for golfers
Good place to relax/escape from hectic life

▶ A place everyone should visit at least once
First-class hotels/resorts

▶ Great shopping
Good for couples

▶ A fun place for a vacation

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
Mississippi Gulf Coast's Image Strengths vs. Pensacola/Panhandle

Excellent fishing

Difference in Percent Who Strongly Agree

0 5 10

5
Children would especially enjoy this place
Great for golfers
Well-known destination
Good place for families to visit
Great for motorcycle touring
Popular with vacationers
A fun place for a vacation
Great shopping
Lots of things to see and do
A place I would feel welcome
A vacation there is a real adventure
A place everyone should visit at least once

Difference in Percent Who Strongly Agree

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
Mississippi Gulf Coast's Image Strengths vs. Daytona Beach

- Excellent fishing
- Great for exploring nature
- Good for viewing wildlife/birds
- An exciting place
- Interesting historic sites
- Natural, unspoiled scenic beauty
- Warm, friendly people
- Affordable to get to
- Affordable to eat there
- Just the right distance for a weekend getaway
- Good place to relax/escape from hectic life
- Great for outdoor adventure sports
- Affordable accommodations

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
Mississippi Gulf Coast's Image Weaknesses vs. Daytona Beach

- Children would especially enjoy this place
- Great spectator sports venues
- Well-known destination
- Great for motorcycle touring
- A vacation there is a real adventure
- Great shopping
- Popular with vacationers
- Great for golfers
- Lots of things to see and do
- Good place for families to visit

Difference in Percent Who Strongly Agree

<table>
<thead>
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<tr>
<td>Good place for families to visit</td>
<td>-9</td>
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</table>
Mississippi Gulf Coast's Image Weaknesses vs. Daytona Beach

I often notice advertising for this place
▶ A place everyone should visit at least once
▶ Provides a unique vacation experience
  ▶ Good for couples
  ▶ Excellent climate overall
  ▶ First-class hotels/resorts
▶ Exciting nightlife/entertainment/shows
  ▶ A place I would feel welcome
  ▶ Well-known landmarks
  ▶ Interesting cities and towns

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
Mississippi Gulf Coast's Image Strengths vs. Tampa/St. Petersburg

Warm, friendly people
Just the right distance for a weekend getaway
An exciting place
Affordable to eat there
Natural, unspoiled scenic beauty
Affordable to get to
Excellent fishing
Safe in tourist areas
Not too far away to consider for a vacation
Great for exploring nature

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
Great spectator sports venues
Children would especially enjoy this place
Great shopping
Great for golfers
Lots of things to see and do
Exciting nightlife/entertainment/shows
Well-known destination
Excellent museums/galleries
A vacation there is a real adventure
Well-known landmarks
A great place to experience fine dining
Offers a variety of dining options
Interesting cities and towns

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
Mississippi Gulf Coast's Image Strengths vs. Virginia Beach

Just the right distance for a weekend getaway
Excellent fishing
Affordable to get to
Affordable to eat there
Good for viewing wildlife/birds
An exciting place
Natural, unspoiled scenic beauty
Not too far away to consider for a vacation
Great for exploring nature
Easy to get to
Great for outdoor adventure sports

Difference in Percent Who Strongly Agree

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
Mississippi Gulf Coast's Image Weaknesses vs. Virginia Beach

- Children would especially enjoy this place: -14
- A good contrast of seasons: -13
- Well-known destination: -12
- Great for golfers: -9
- Great shopping: -7
- Well-known landmarks: -7
- Excellent museums/galleries: -7
- A vacation there is a real adventure: -6
- Popular with vacationers: -5

Difference in Percent Who Strongly Agree
Appendix: Impact of Ads on Trip Planning
After a Mississippi Gulf Coast Ad – Action Taken to Obtain More Information

- Searched for information on the Internet using a search engine: 27%
- Looked for information on social media (i.e. Facebook, Twitter, Instagram): 11%
- Requested a brochure online/by phone: 8%
- Other: 3%
- None of these: 62%
Do you recall visiting the travel website www.GulfCoast.org?
How many times did you visit www.GulfCoast.org?

- Once: 22
- 2-4 times: 51
- 5-7 times: 15
- 8-10 times: 12

Percent