coastal MISSISSIPPI
The Secret Coast

Longwoods INTERNATIONAL

Coastal Mississippi 2020 Advertising Markets Awareness & Visitation COVID-19 Impact Study

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Background and Purpose

- In 2020, Coastal Mississippi launched their advertising campaign in key drive markets.
  - The campaign consisted of both traditional and online media including:
    - Digital
    - Television
    - Out-of-home
  - The Re-Entry Campaign ran from June-November 2020
  - The Recovery Campaign ran from November-December 2020
- Longwoods was engaged to conduct a program of research designed to:
  - Measure the awareness of the advertising campaign in Coastal Mississippi's drive markets across channels.
  - Determine the impact the Coastal Mississippi advertising campaign had on Coastal Mississippi's image as a vacation destination.
  - Through an analysis of Coastal Mississippi's image versus their competitive set, provide input into the development of positioning and messaging for future campaigns.
  - Investigate past and future intended visitation to Coastal Mississippi, and to determine the impact of COVID-19 on travel plans.

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Method

- A benchmark study was conducted after the conclusion of the advertising period to measure awareness of specific ads and the image of Coastal Mississippi in the advertising markets.
  - A national self-completion survey of 1,500 respondents in the advertising markets, distributed as follows:
    - New Orleans DMA 375
    - Mobile-Pensacola DMA 325
    - Jackson DMA 200
    - Baton Rouge DMA 200
    - Lafayette DMA 200
    - Columbus-Tupelo DMA 200
  - 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.
  - Sample was drawn to be proportionate to population by specific states/cities, age, sex and income.

Method (Cont'd)

- The survey took an average of 8 minutes to complete.
- During the survey respondents were shown copies of the advertising materials. This was at the end of the survey as not to bias earlier questions on attitudes towards Coastal Mississippi and other behavioral measures.
- The fieldwork was conducted in December 2020.
- 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 States/DMAs.
- For a sample of this size, the confidence level is + / – 2.5%, 19 times out of 20.
- Unless otherwise noted, results shown are representative of all respondents surveyed (n=1,500 travelers).

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Conclusions and Recommendations

Conclusions and Recommendations

- Over half of travelers in Coastal Mississippi's drive markets recalled seeing at least one ad from the Re-Entry or Recovery campaigns.
- Ad awareness was highest in the Jackson and Columbus-Tupelo DMAs.
- Travelers were most likely to recall a television advertisement, followed by digital and out-of-home ads.
- The campaign had a positive impact on travelers' perceptions of Coastal Mississippi, as travelers exposed to the campaign gave Coastal Mississippi substantially higher rating scores than those unfamiliar with the campaign in all the image battery statements included in the survey.
- When we compare the image ratings of travelers who have never visited Coastal Mississippi 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 two groups.

Conclusions and Recommendations (Cont'd)

- From this analysis we find that travelers who visited Coastal Mississippi rated each of the image battery statements higher than those who have never visited.
- Relative to the other destinations in the competitive set for this study, Coastal Mississippi has a positive overall image among travelers, especially outperforming Baton Rouge and Lake Charles.
- Over three-fourths of travelers in Coastal Mississippi's drive markets have visited Coastal Mississippi in the past, and just under three-fourths have visited during the past 2 years.
- Over half of travelers in Coastal Mississippi's drive markets intend to take an overnight or day leisure trip to Coastal Mississippi during the next 18 months.
- Among the competitive set, Coastal Mississippi is the destination the most travelers in the markets included in this survey intend to visit.
- Just over half of travelers in Coastal Mississippi's drive markets said COVID-19 would greatly impact their travel plans.

Conclusions and Recommendations (Cont'd)

- During the next six months, four in ten travelers in Coastal Mississippi's drive markets will change their domestic leisure travel plans because of COVID-19 concerns and less than two in ten will change their domestic business travel plans. A quarter asserts COVID-19 will have no impact on their travel plans, while almost a third don't have any travel plans during the next six months.
- Among those who indicated they would change their travel plans, six in ten are reducing their travel and four in ten canceled trips completely.
- Six in ten travelers in Coastal Mississippi's drive markets are hesitant to travel during the next six months. Three-fourths are hesitant over concerns about spreading/contracting COVID-19.

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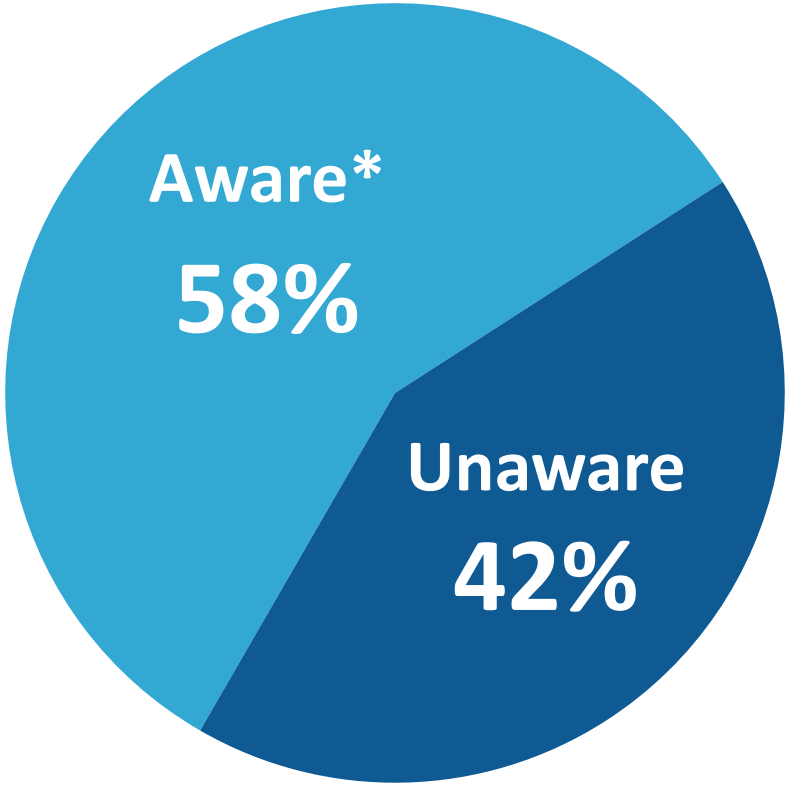
Advertising Awareness

Advertising Awareness

- Over half (58%) of travelers in Coastal Mississippi's drive markets recalled seeing at least one ad from the Re-Entry or Recovery campaigns.
- Ad awareness was highest in Jackson (63%) and Columbus-Tupelo (62%).
- Travelers were most likely to recall a television advertisement (50%), followed by digital (38%) and out-of-home (34%) ads.
- Almost half of travelers in Coastal Mississippi's drive markets recalled seeing at least one Recovery (46%) or Re-Entry (45%) ad.
- The ads with the highest levels of recall were:
  - Online Streaming tv ad (30%)
  - OOH Gaming ad (26%)
  - Gaming Video tv ad (26%)
  - Long Distance Connections tv ad (25%)
  - Brand Video tv ad (22%)
  - Gaming Banner digital ad (20%)

Awareness of the Ad Campaign

Base: Residents of Coastal Mississippi's Regional Advertising Markets



*Saw at least one ad

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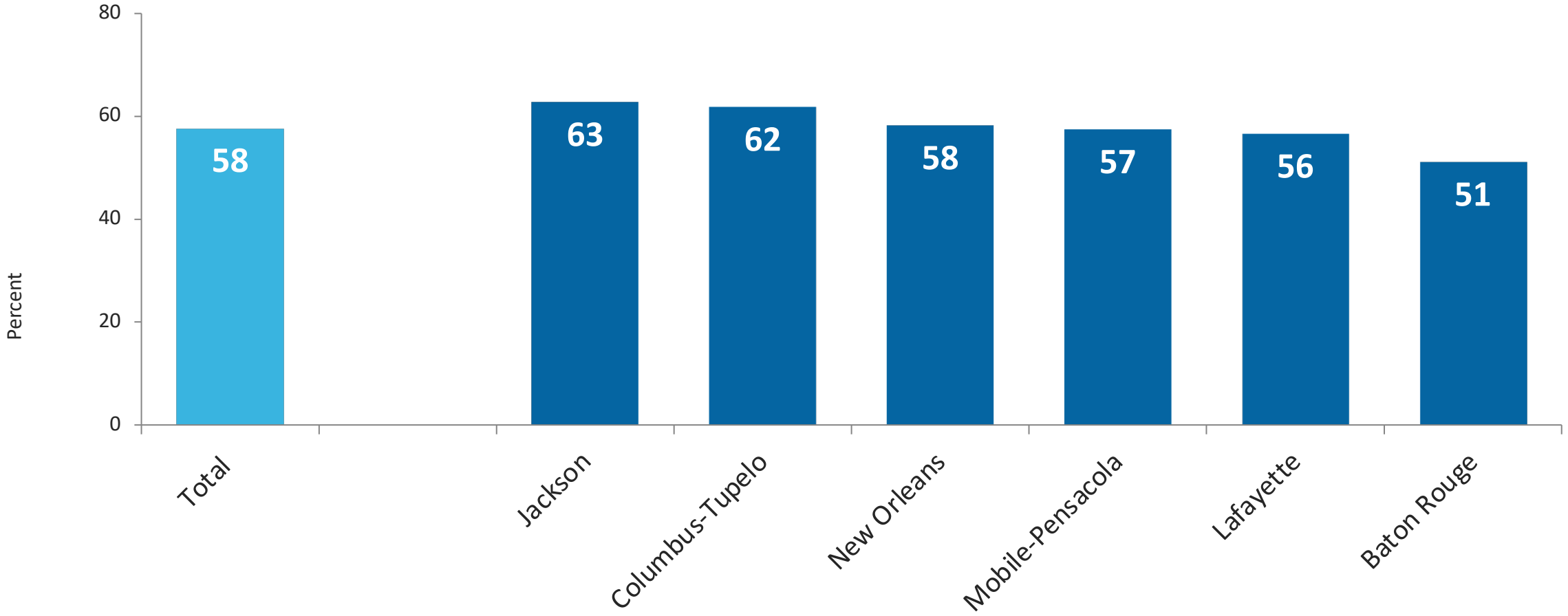
Awareness* by Market

Base: Residents of Coastal Mississippi's Regional Advertising Markets



*Saw at least one ad

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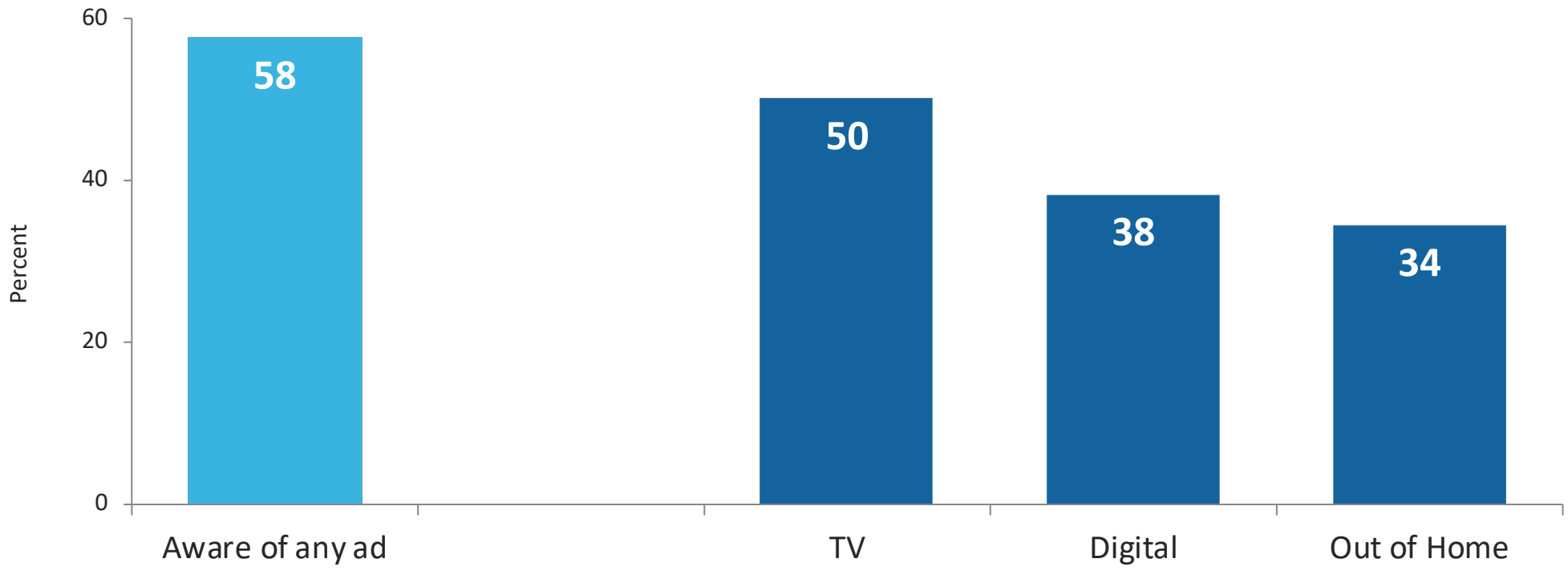
Advertising Awareness* by Medium

Base: Residents of Coastal Mississippi's Regional Advertising Markets



*Saw at least one ad and based on markets where shown

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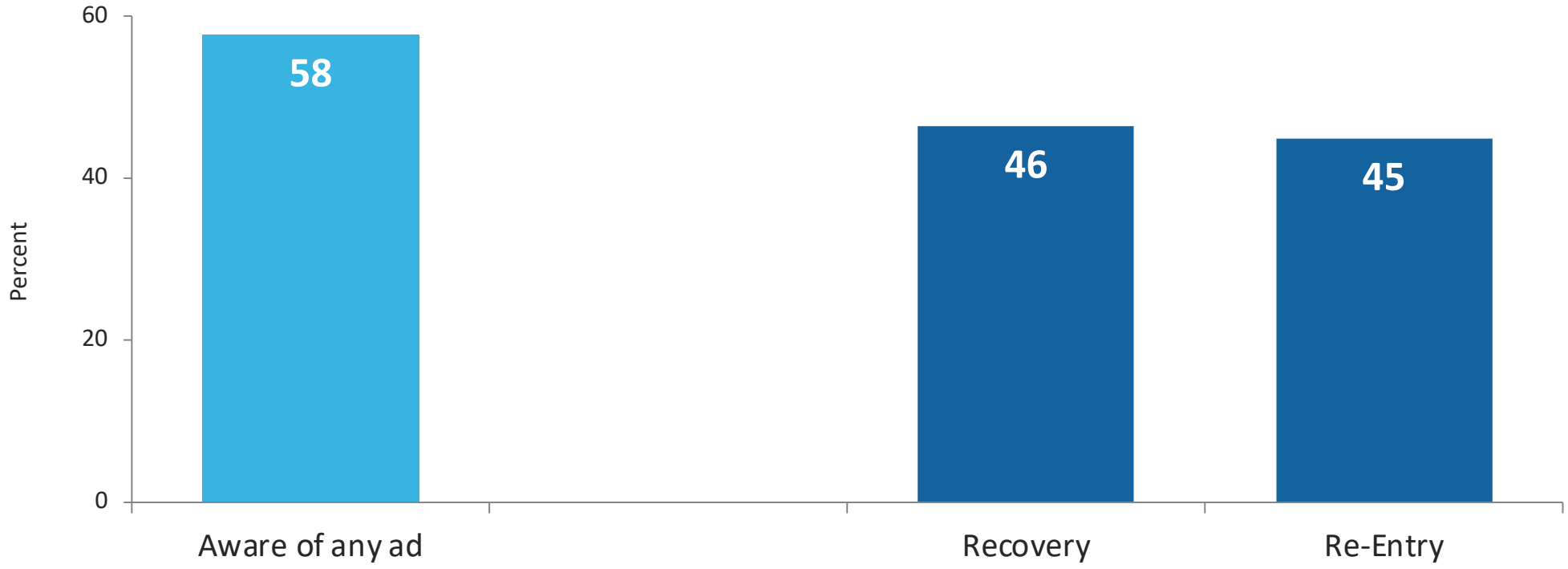
Advertising Awareness* by Campaign

Base: Residents of Coastal Mississippi's Regional Advertising Markets



*Saw at least one ad and based on markets where shown

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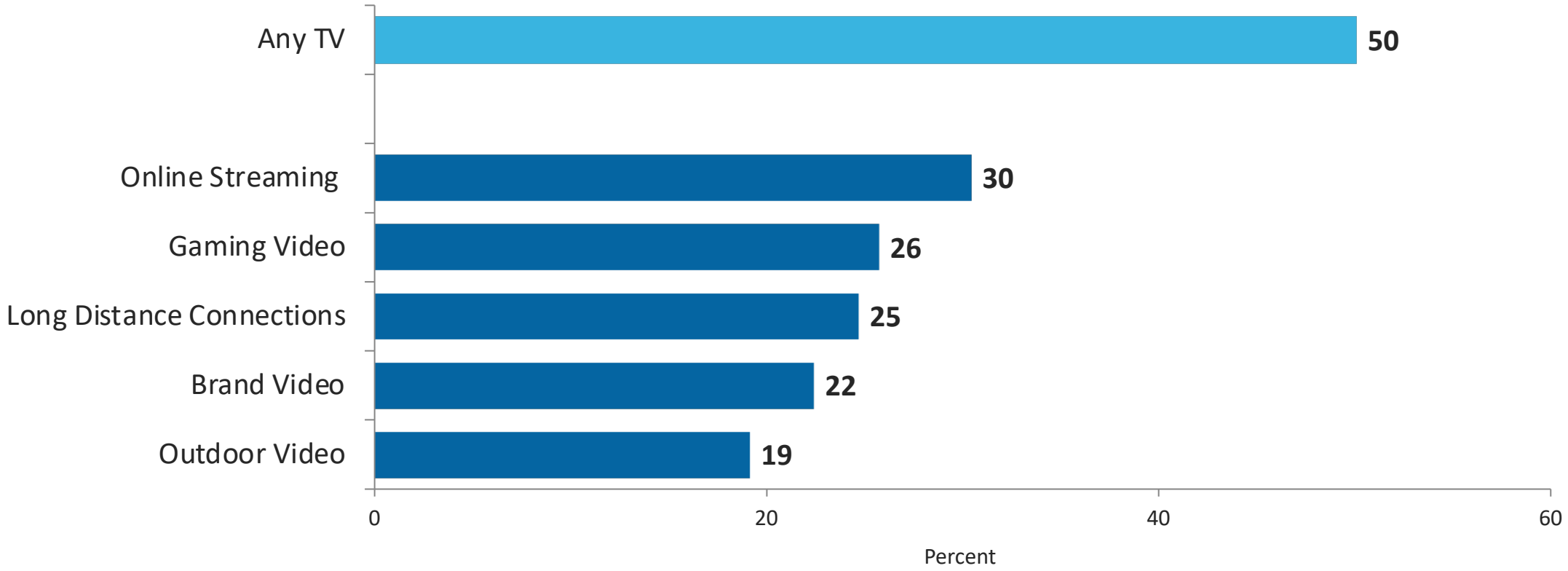
Awareness of Individual Ads - TV



Digital Creative

Banner Compilation-Online Streaming

Banner Compilation-Cooking Dinner

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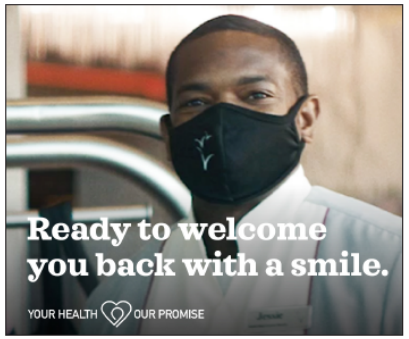
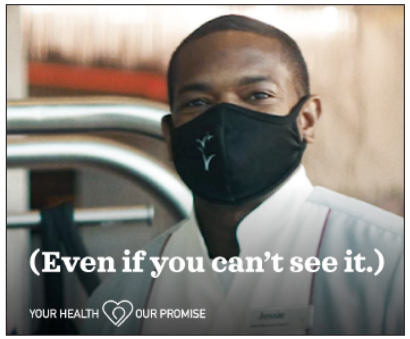
Digital Creative (Cont'd)





Brand Banner

Outdoor Banner

Gaming Banner

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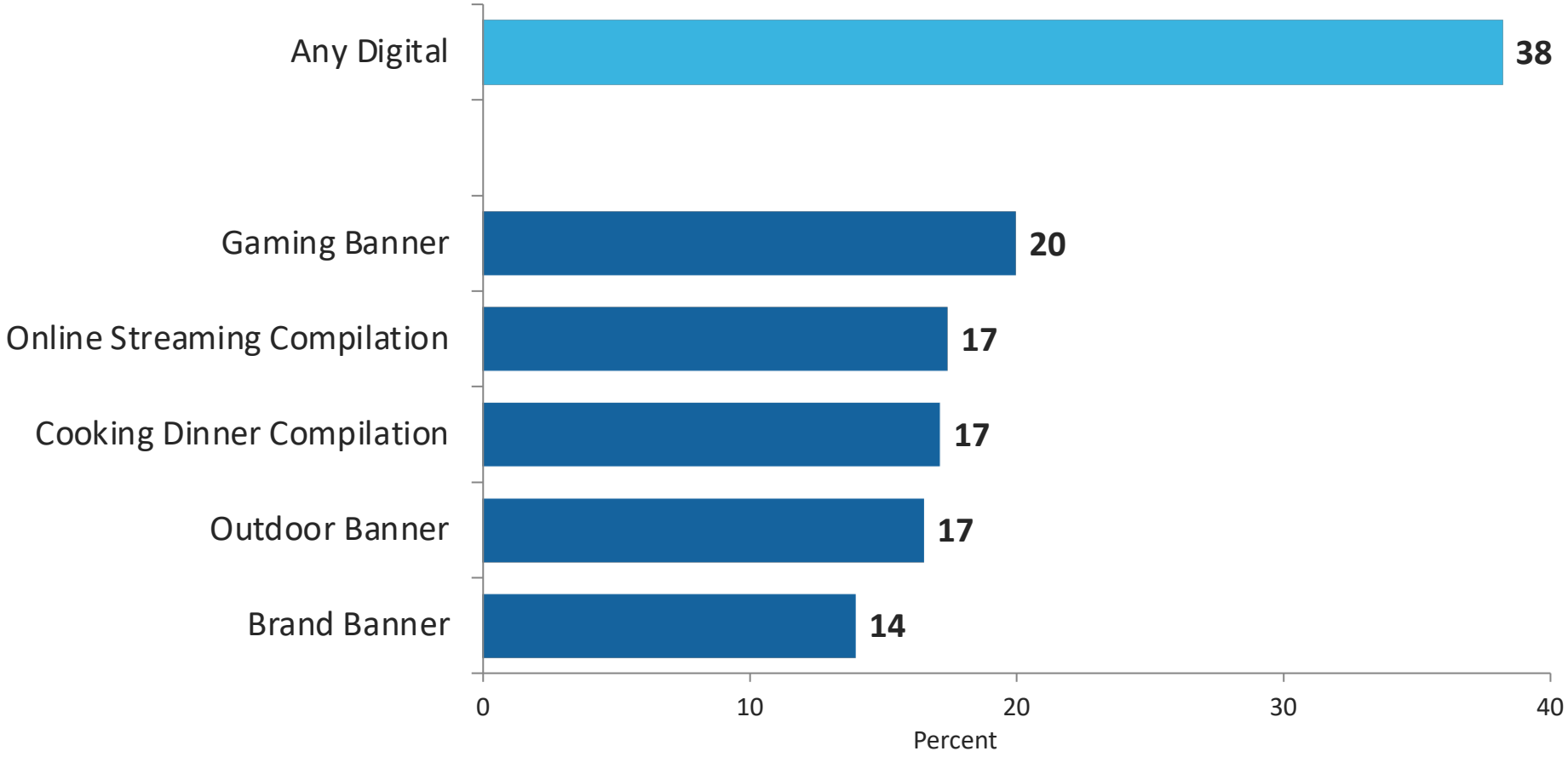
Awareness of Individual Ads - Digital



Out of Home Creative

Re-Entry OOH Compilation

OOH Gaming

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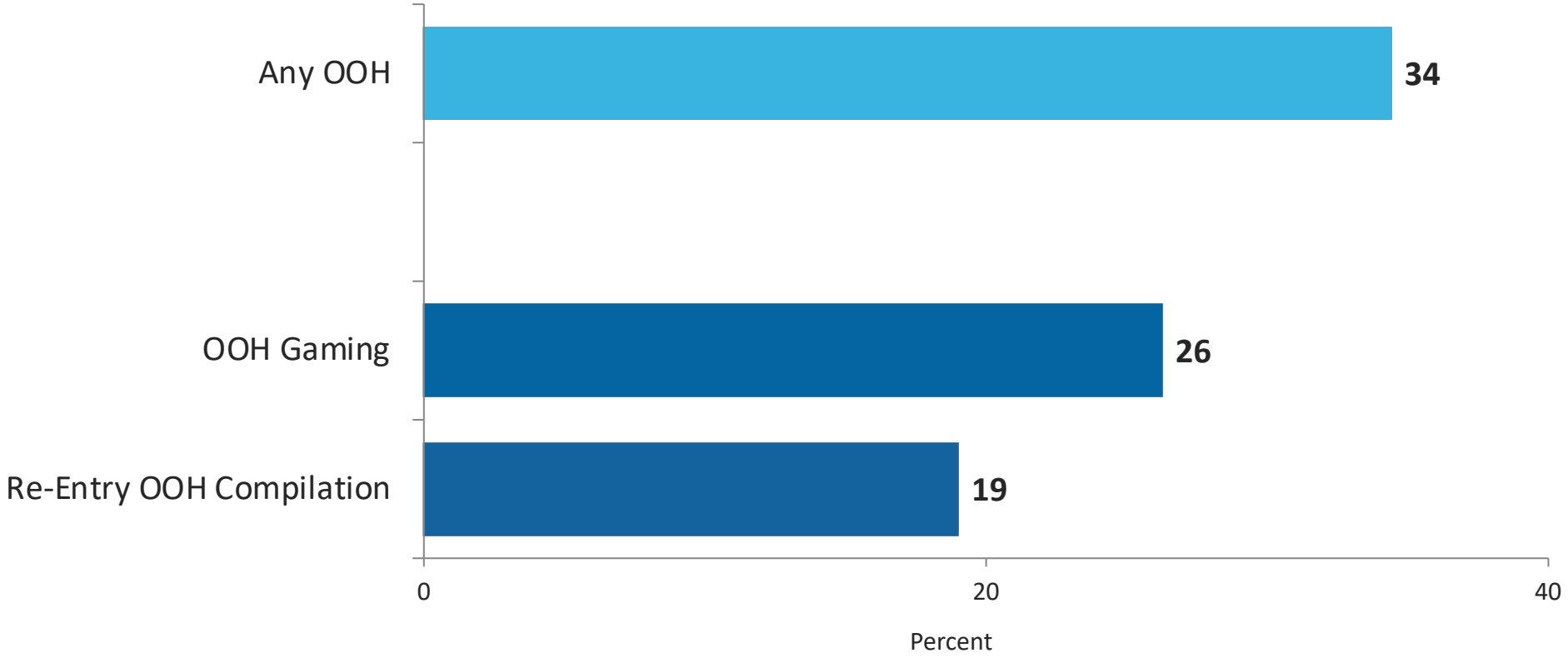
Awareness of Individual Ads* - Out of Home



*Based on markets where shown

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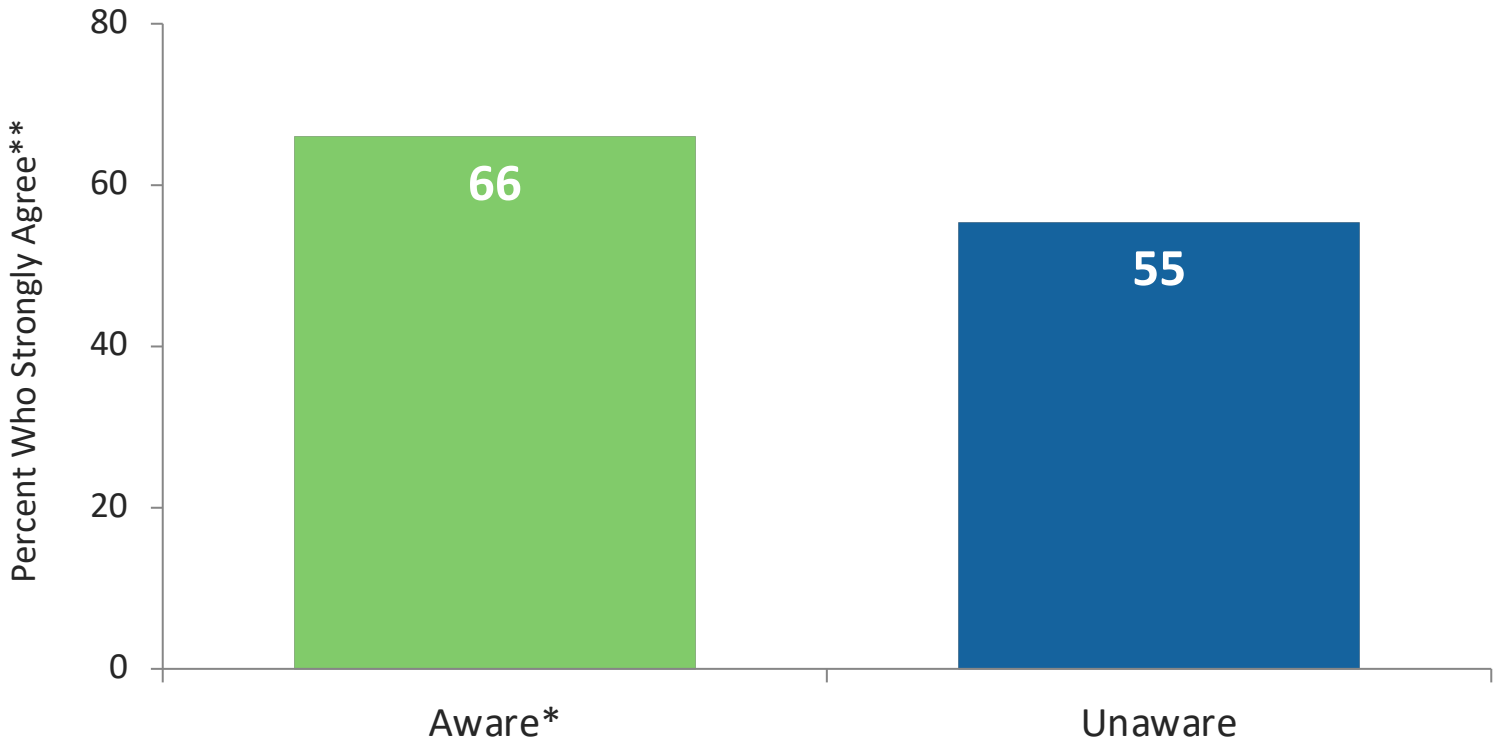
Advertising Impact on Short-of-Sales Measures

Advertising Impacts

- The campaign had a positive impact on travelers' perceptions of Coastal Mississippi:
  - Travelers exposed to the campaign gave Coastal Mississippi substantially higher rating scores than those unfamiliar with the campaign for the general overall statement "Coastal Mississippi is a place I would really enjoy visiting".
  - For the more detailed attributes, we find that the campaign did a very good job of improving traveler's perceptions of Coastal Mississippi for every image dimension evaluated.
- The advertising had greatest impact on perceptions related to:
  - Excellent vacation value for the money
  - A fun place for a vacation
  - Full of surprising experiences
  - An exciting place
  - Great for outdoor activities
  - Provides a unique vacation experience
  - Great for beautiful scenic views

Advertising Impact on Coastal Mississippi's Overall Image - "A place I'd really enjoy visiting"



*Saw at least one ad

**"Percent who strongly agree" is the percent of respondents giving a statement on agree/disagree rating of 8, 9 or 10 out of 10

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Image by Awareness

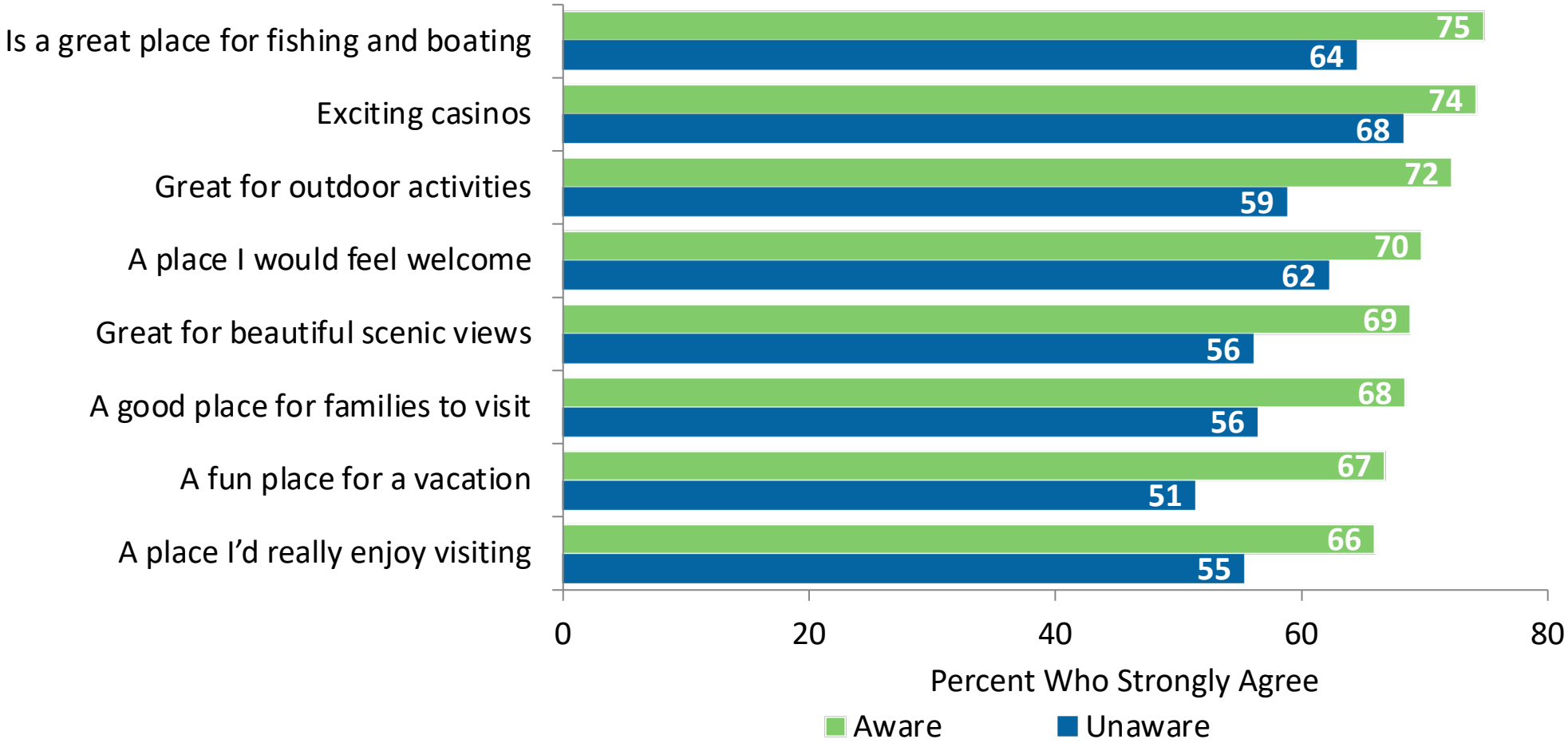

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Image by Awareness (Cont'd)

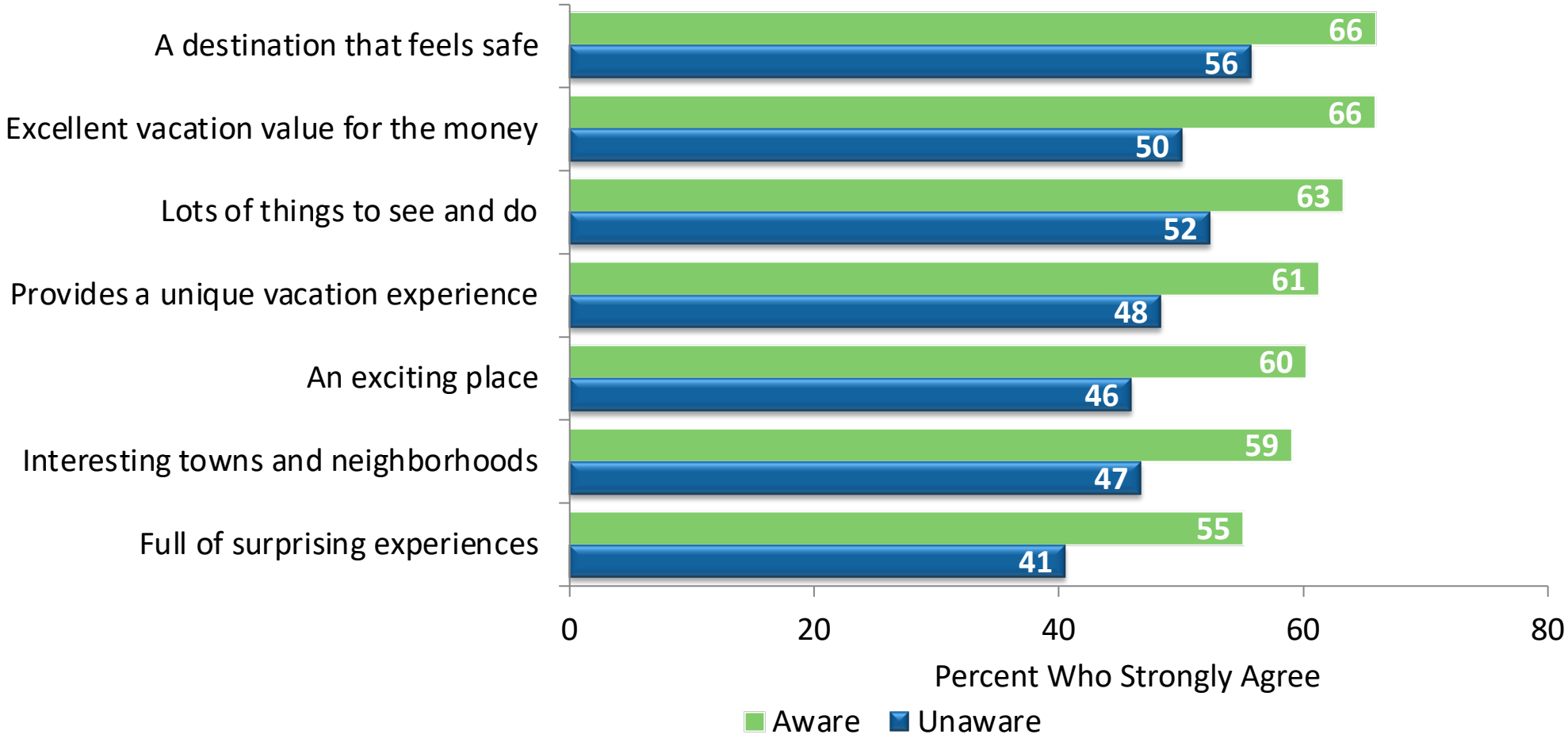

Image Attributes Most Impacted by Advertising

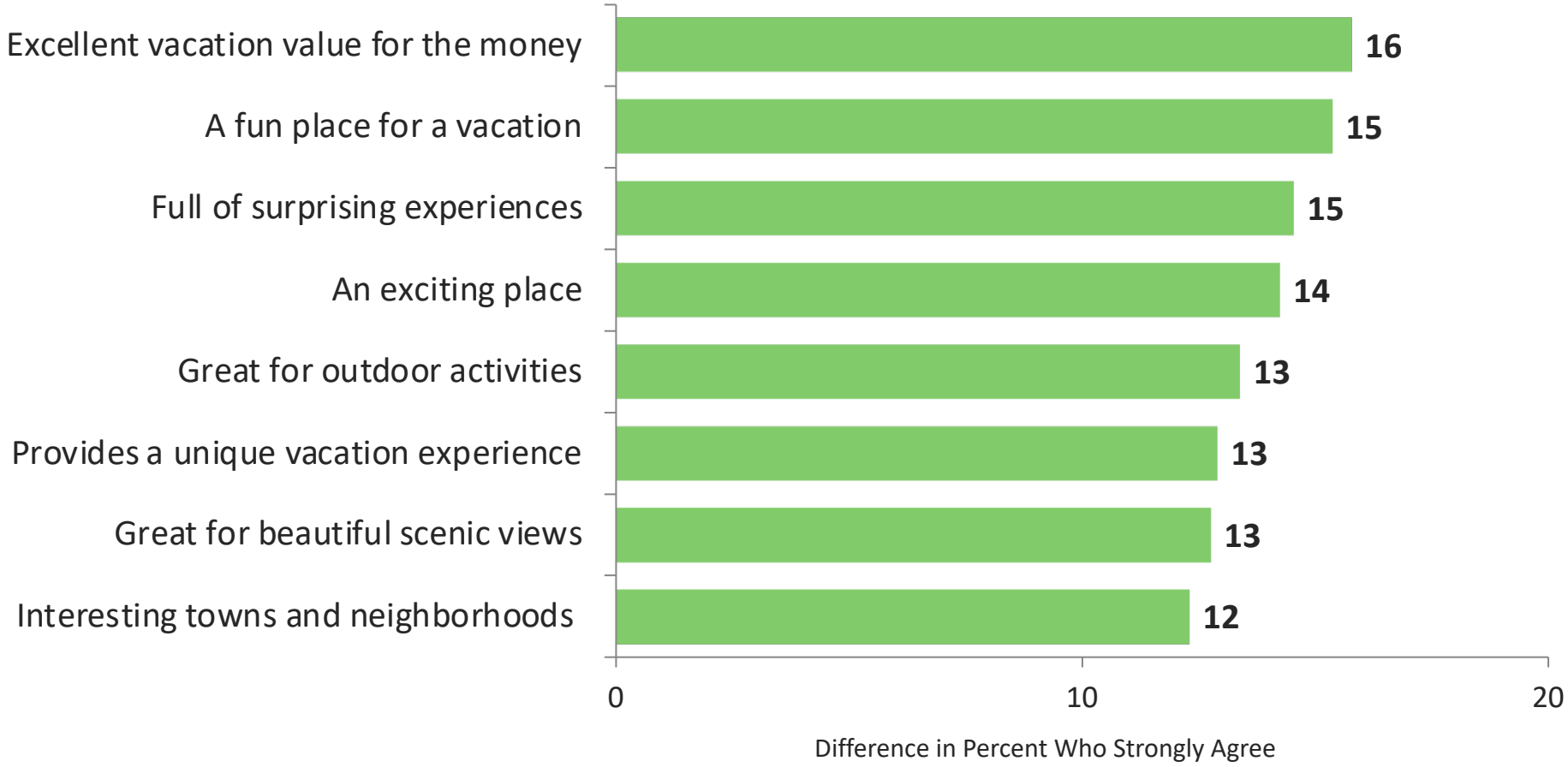

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Image Attributes Most Impacted by Advertising (Cont'd)

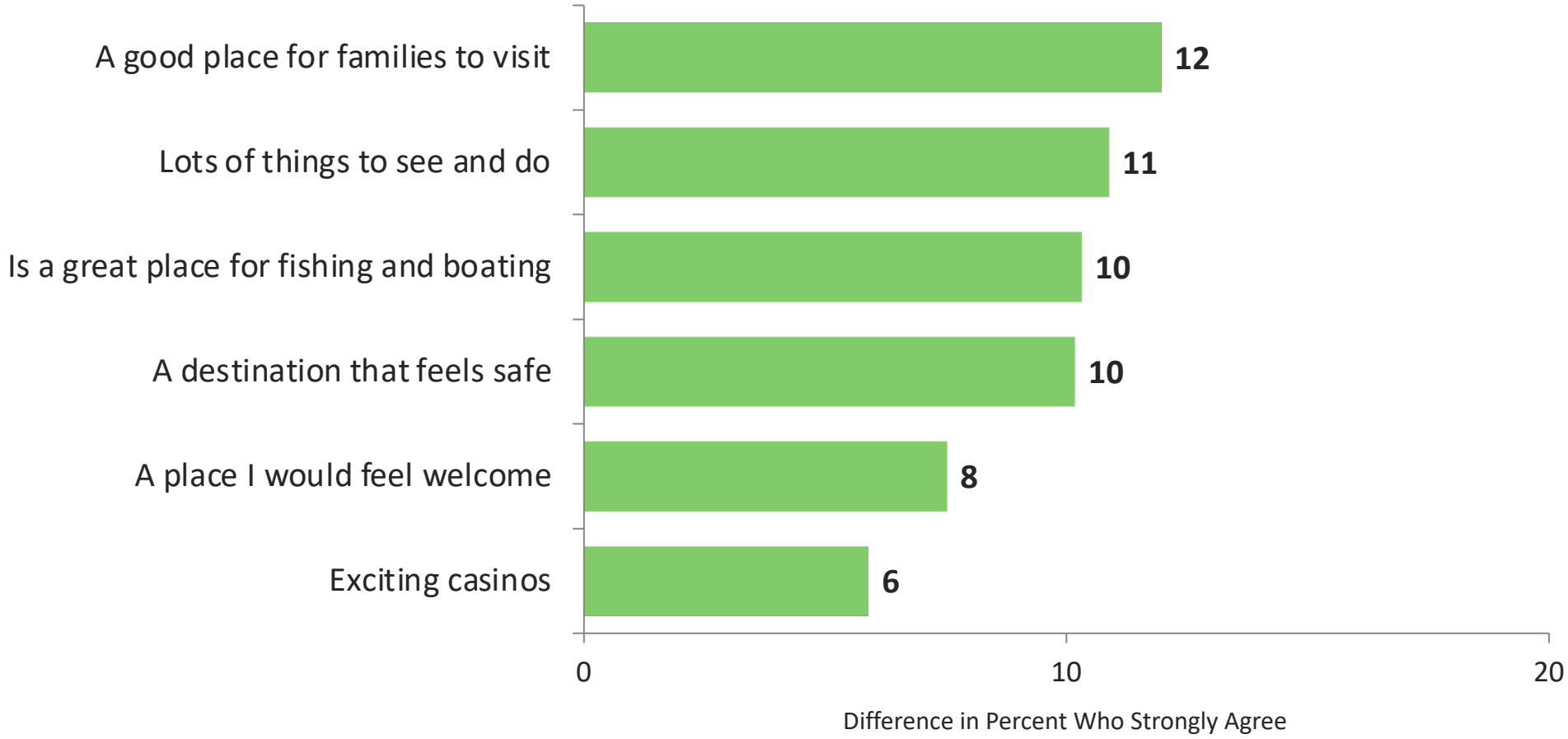

Image Attributes Most Impacted by Advertising

THERE WERE NO ATTRIBUTES NEGATIVELY IMPACTED BY THE ADVERTISING

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Coastal Mississippi's Product Delivery

Product Delivery

- When we compare the image ratings of travelers who have never visited Coastal Mississippi 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 two groups.
- From this analysis we find that travelers who have experienced Coastal Mississippi recently were especially impressed with:
  - Exciting casinos
  - A place I would feel welcome
  - Excellent vacation value for the money
  - A destination that feels safe
  - An exciting place
  - Is a great place for fishing and boating
- Among the dimensions evaluated, there were no areas where visitors felt Coastal Mississippi failed to live up to expectations.

Image by Visitation

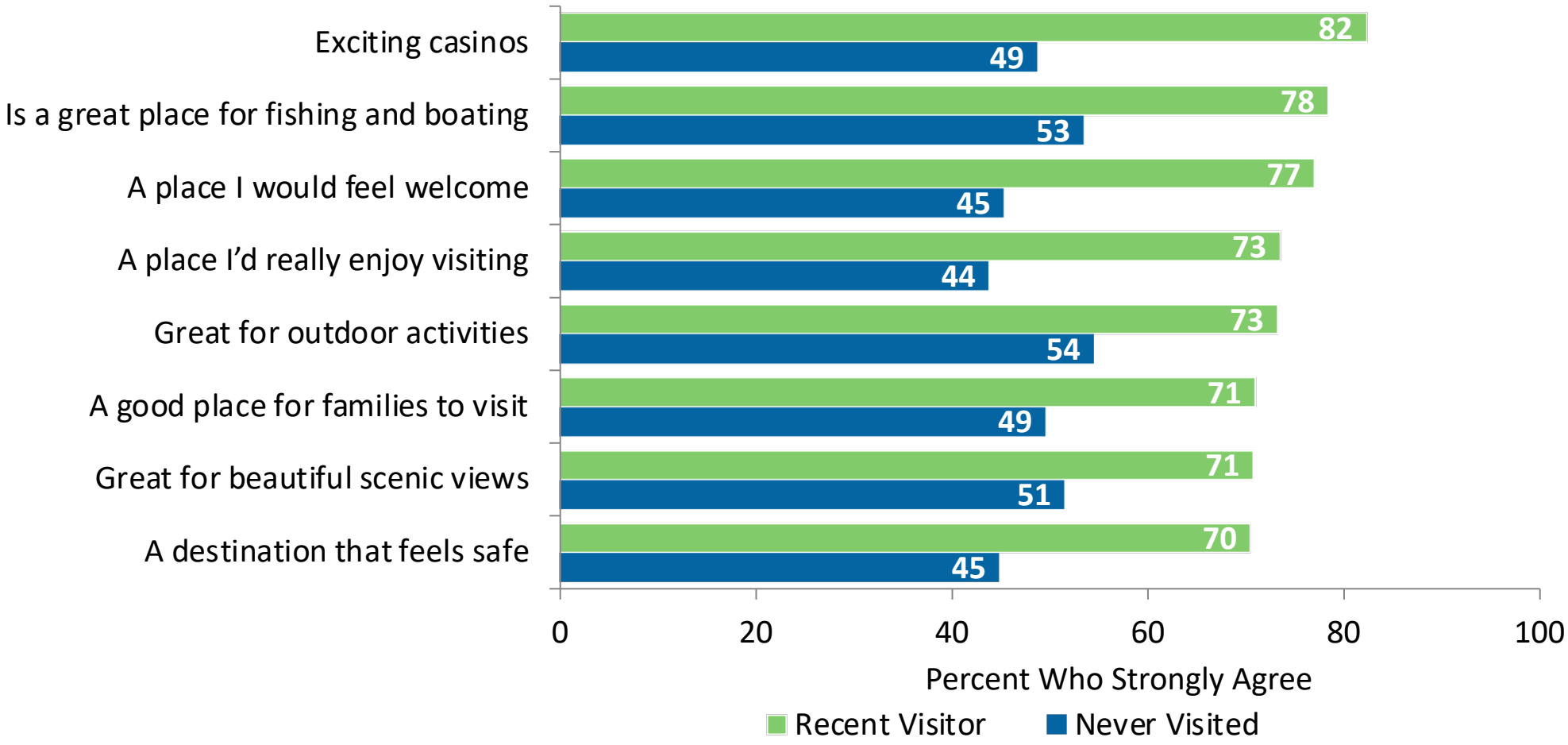
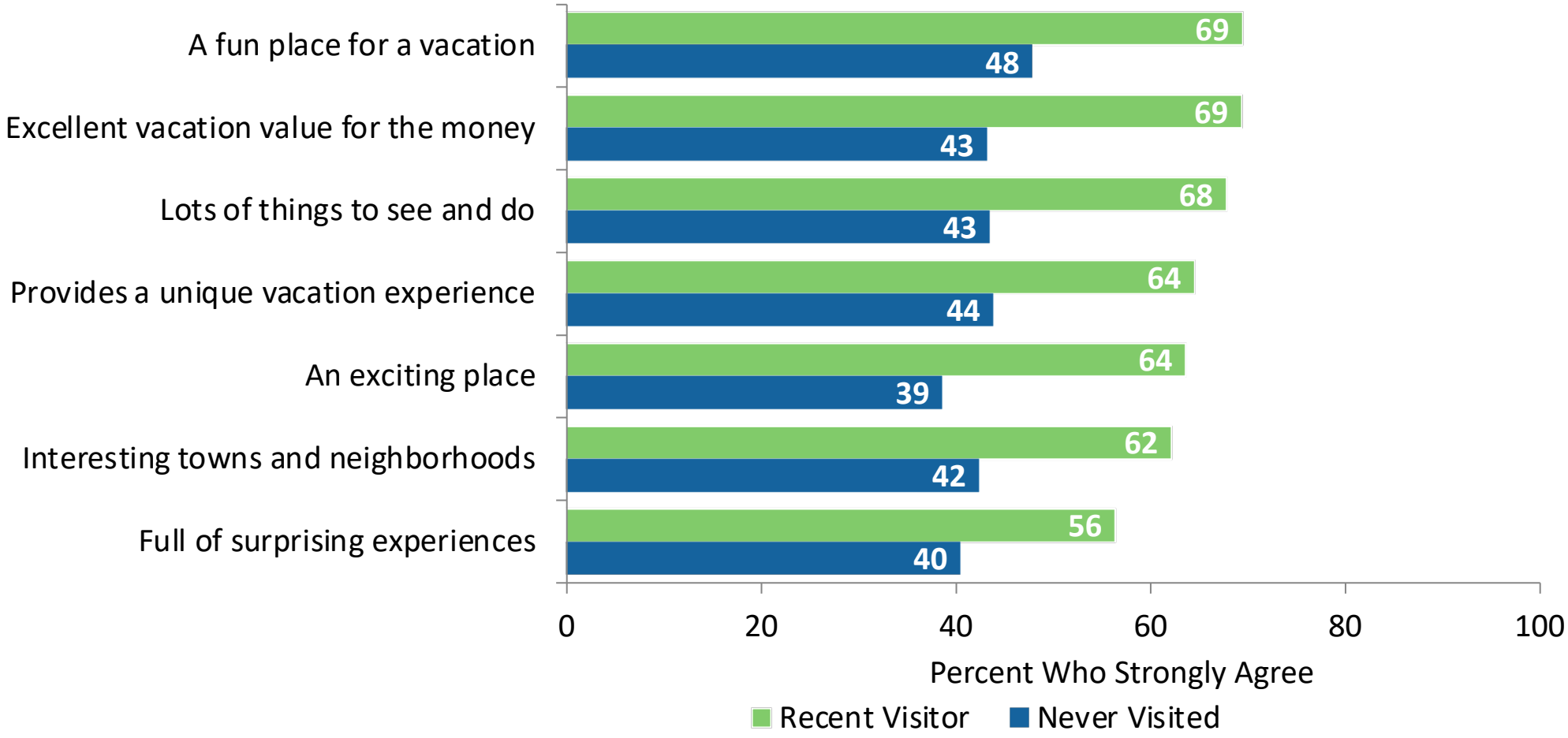
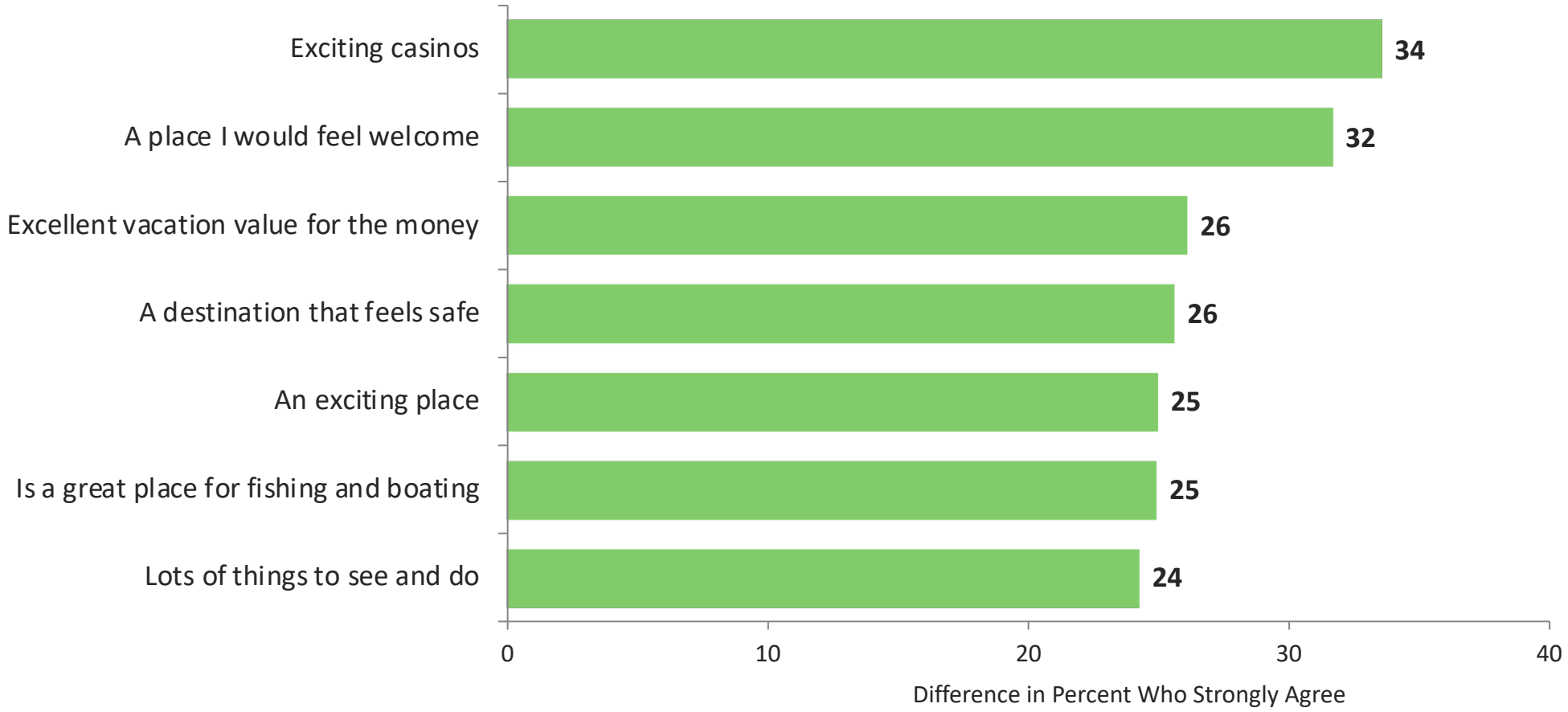


Image by Visitation (Cont'd)



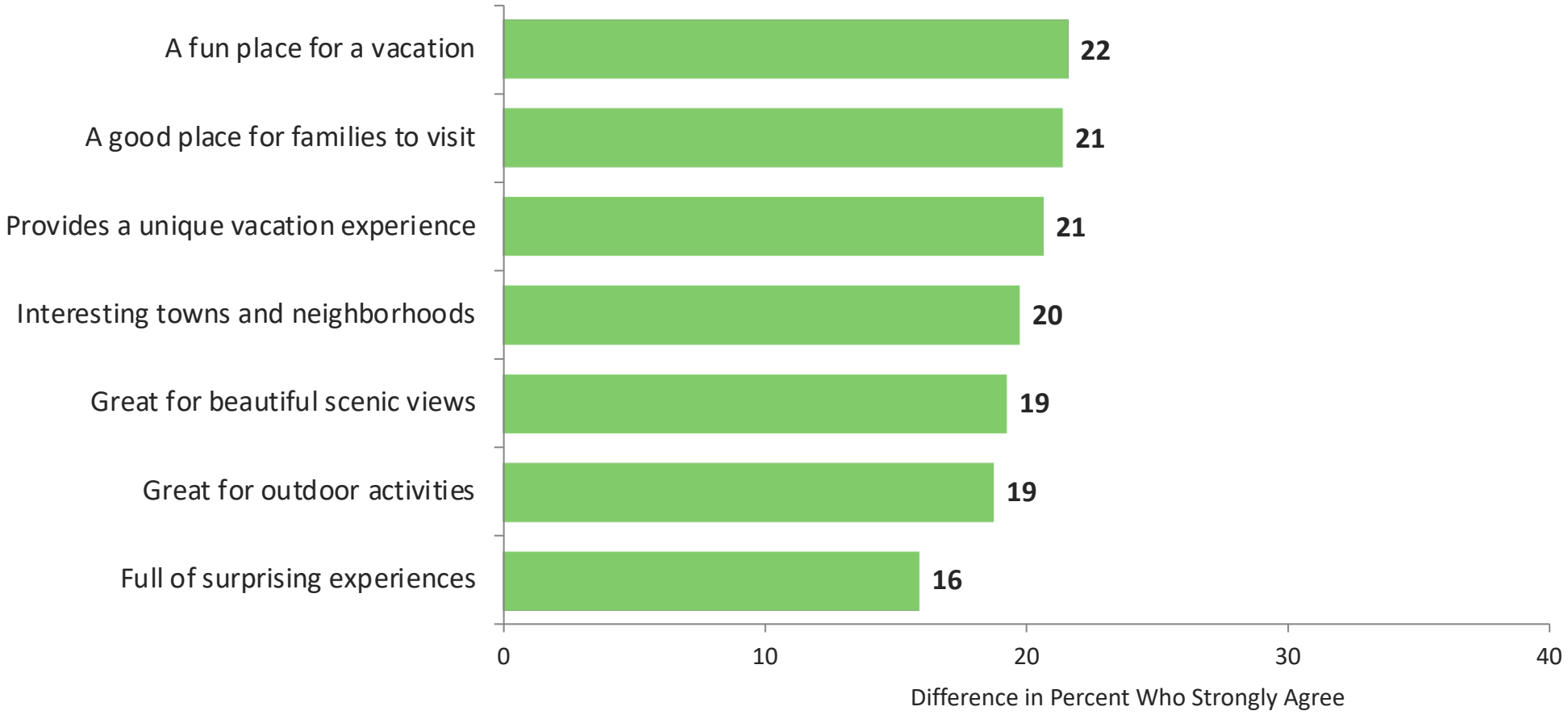
Coastal Mississippi's Product Strengths

Base: Travelers who visited destination in past two years



Coastal Mississippi's Product Strengths

Base: Travelers who visited destination in past two years



Top Product Weaknesses vs. Image

THERE WERE NO SIGNIFICANT PERCEIVED PRODUCT WEAKNESSES VS. IMAGE

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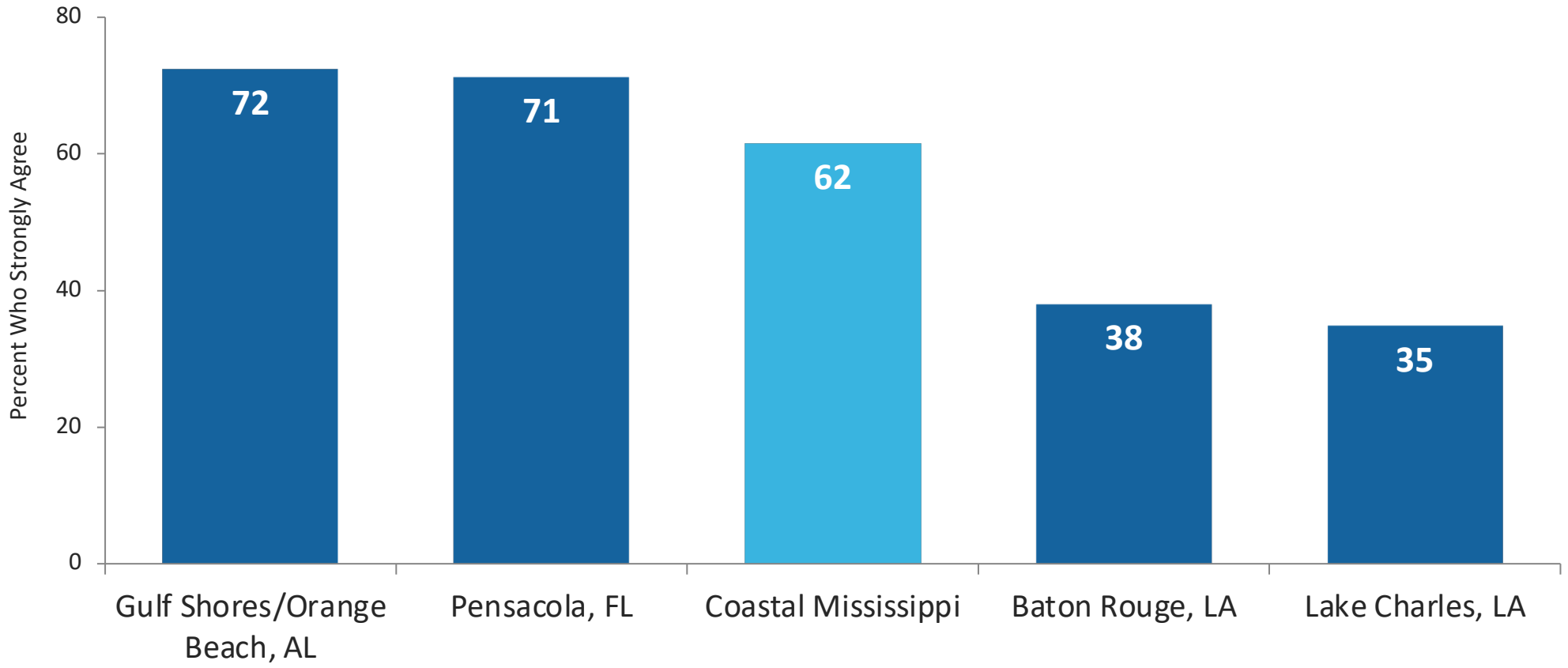
Coastal Mississippi's Image vs. Competition

Coastal Mississippi's Image

- Relative to the other destinations in the competitive set for this study, Coastal Mississippi has a positive overall image among travelers:
  - Across the markets survey, almost two-thirds (62%) rated Coastal Mississippi very favorably as a destination they "would really enjoy visiting."
    - Ahead of Baton Rouge and Lake Charles.
    - Behind Gulf Shores/Orange Beach and Pensacola.
- When comparing Coastal Mississippi's image versus the image of the combined competition, Coastal Mississippi's top image strengths are related to:
  - Exciting casinos
  - Is a great place for fishing and boating
  - Excellent vacation value for the money
  - A destination that feels safe
  - A fun place for a vacation
- There were no significant perceived image weakness compared to the total competitive set.

Coastal Mississippi Overall Image vs. Competition — "A Place I Would Really Enjoy Visiting"



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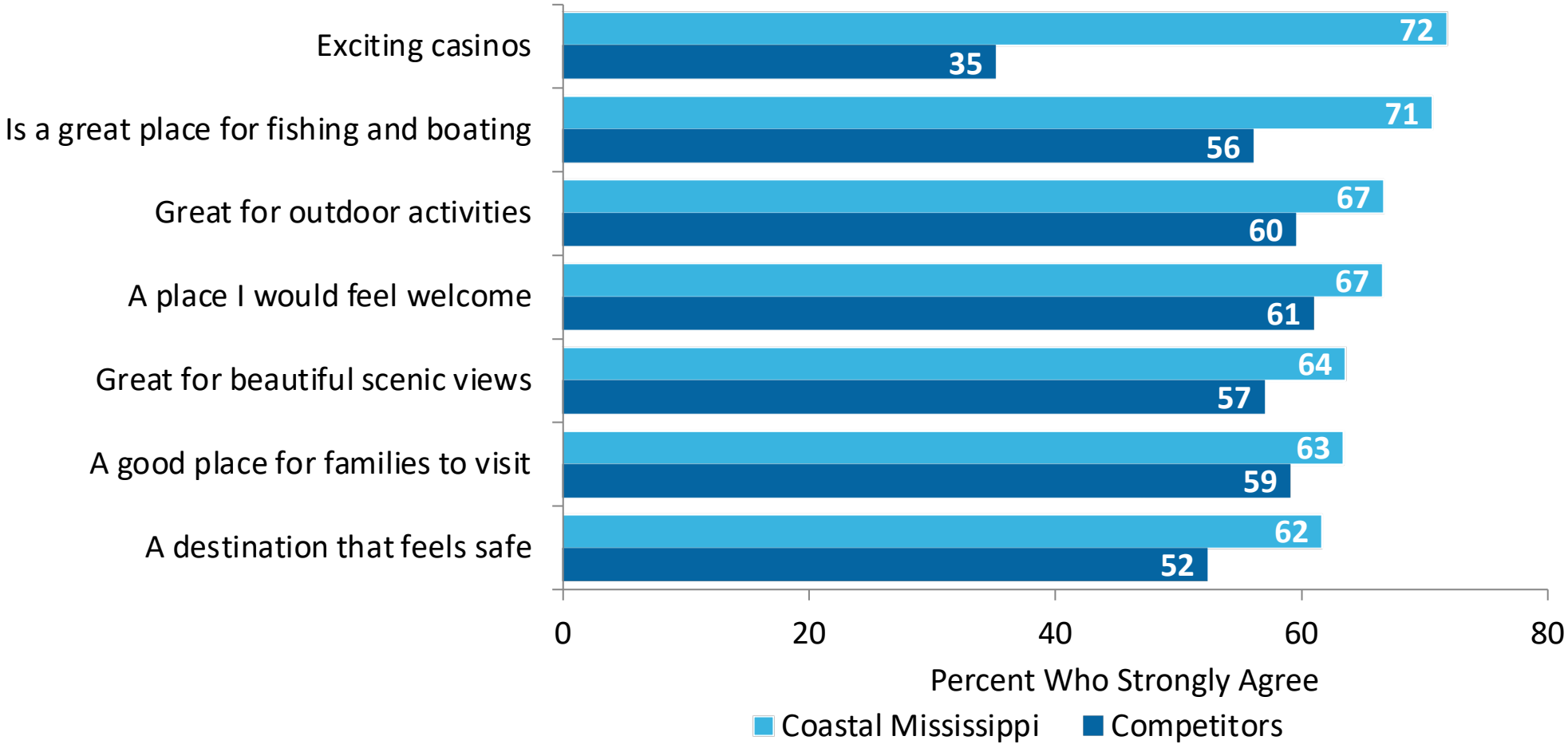
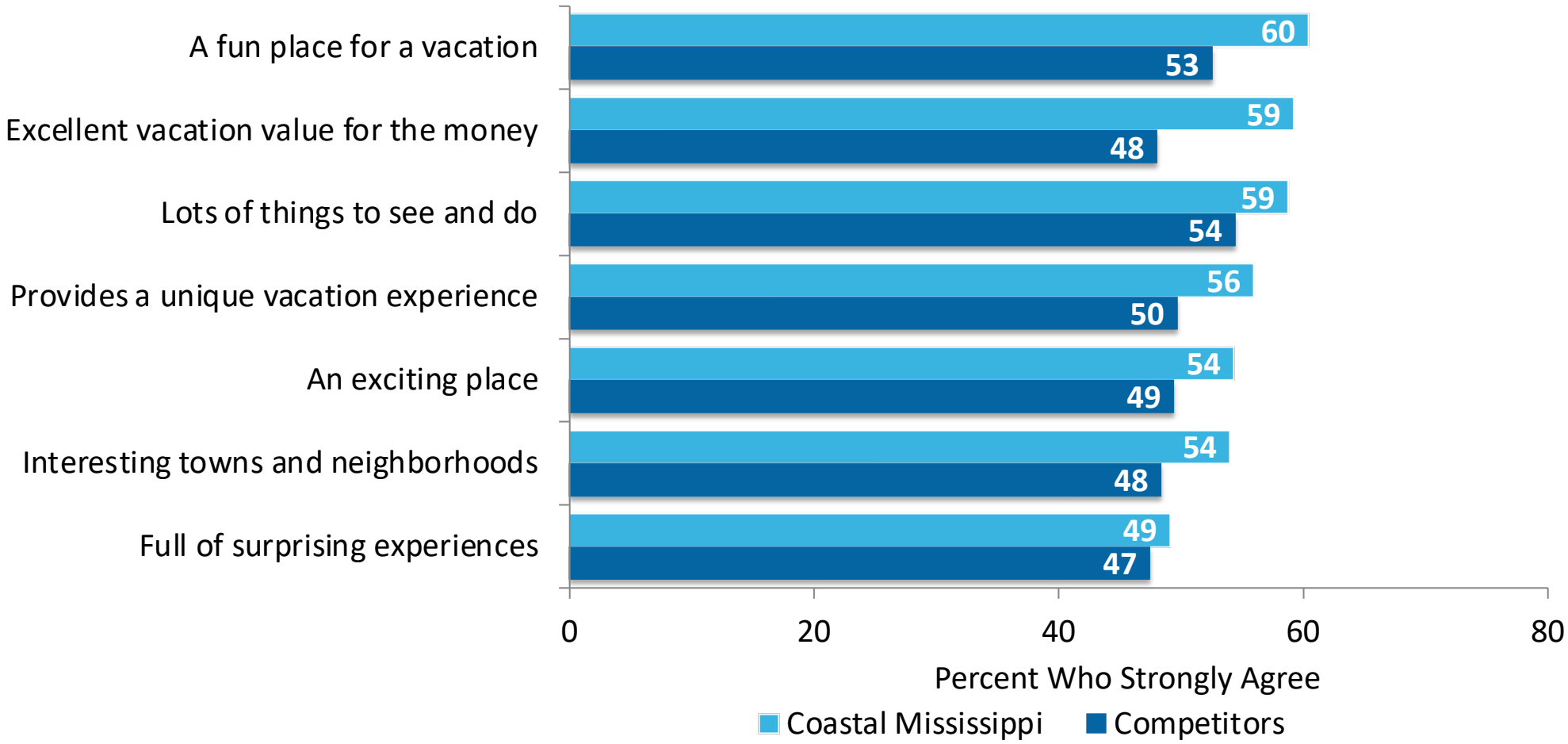
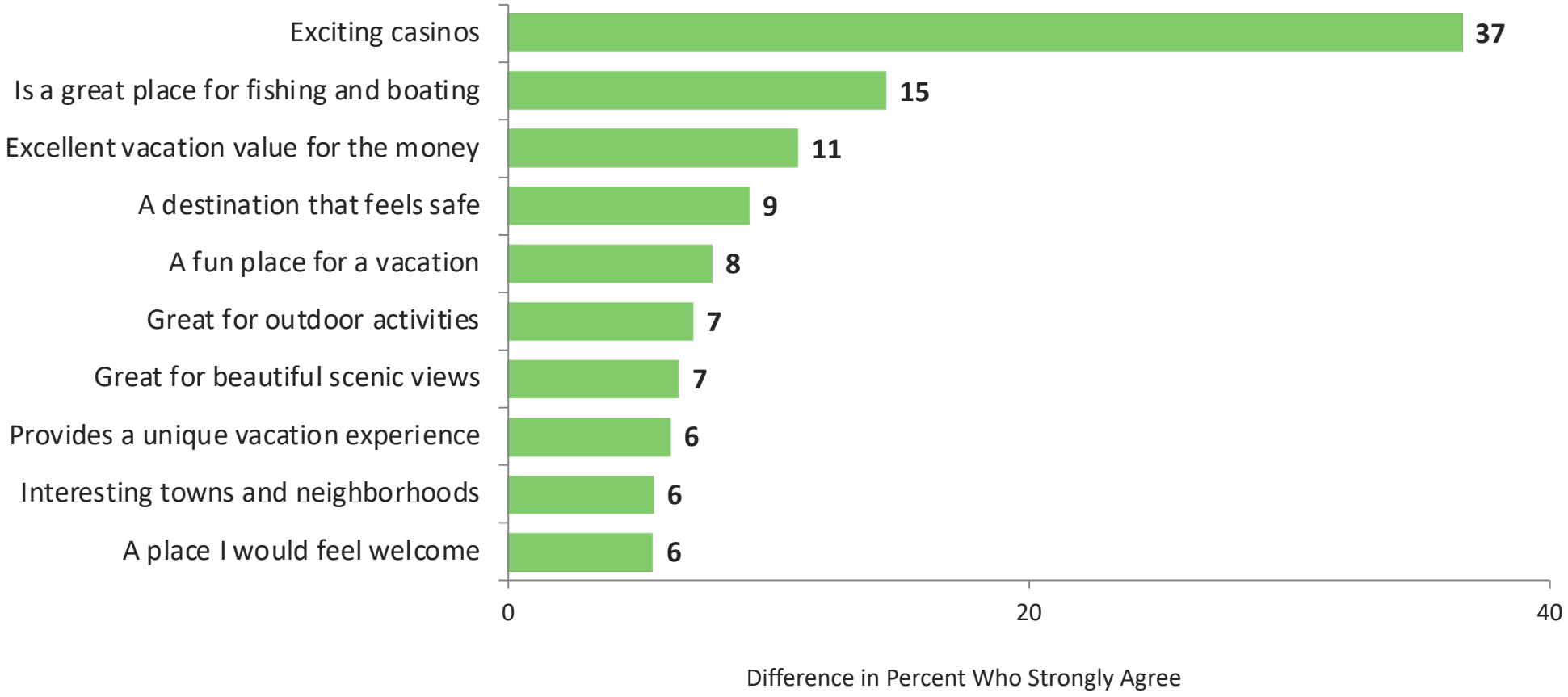
Coastal Mississippi's Image vs. Competition



Coastal Mississippi's Image vs. Competition (Cont'd)



Coastal Mississippi's Image Strengths vs. Competition



Coastal Mississippi's Image Weaknesses vs. Competition

THERE WERE NO SIGNIFICANT PERCEIVED IMAGE WEAKNESSES VS. THE COMPETITION

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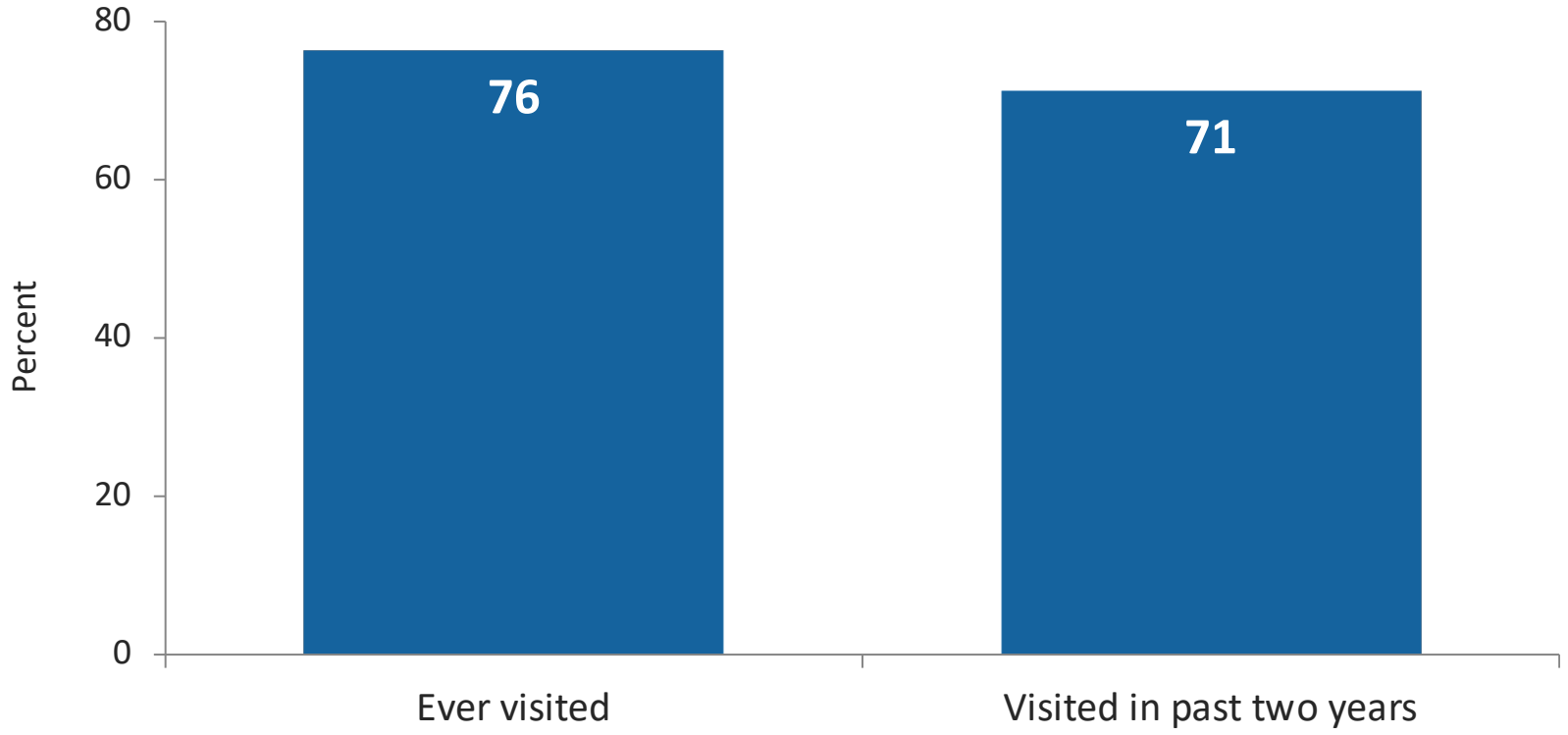
Past & Intended Coastal Mississippi Visitation

Visitation

- Three-fourths (76%) of travelers in Coastal Mississippi's drive markets have visited Coastal Mississippi in the past, and just under three-fourths (71%) have visited during the past 2 years.
- Over half of travelers in Coastal Mississippi's drive markets intend to take an overnight (53%) or day (53%) leisure trip to Coastal Mississippi during the next 18 months.
- Among the competitive set, Coastal Mississippi is the destination the most travelers in the markets included in this survey intend to visit. Almost six in ten (58%) intend to take an overnight and/or day trip to Coastal Mississippi during the next 18 months. Half intend to visit Pensacola (51%) or Gulf Shores/Orange Beach (49%), while over a third intend to visit Baton Rouge (38%) and a quarter Lake Charles (24%).

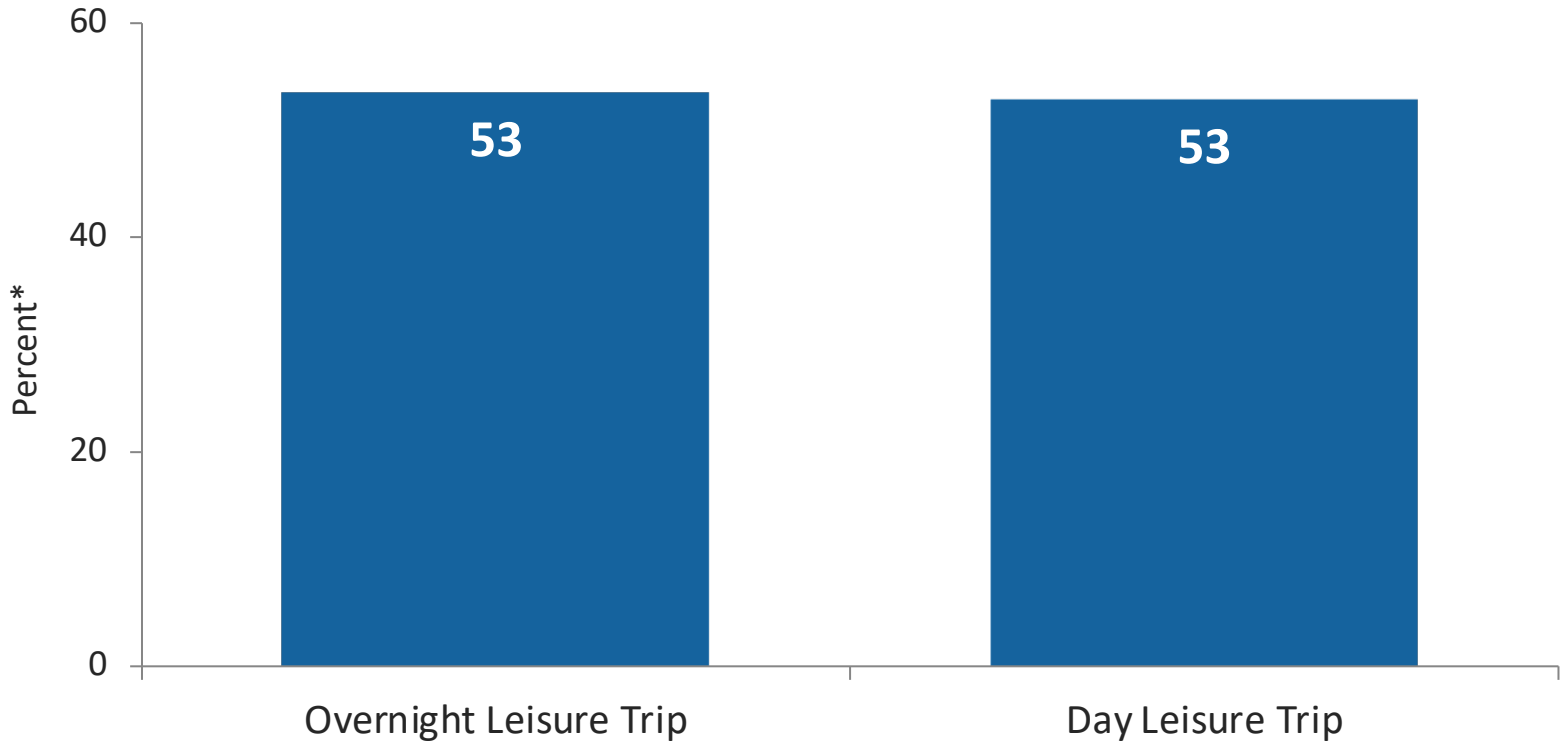
Previous Visitation to Coastal Mississippi

Base: Residents of Coastal Mississippi's Regional Advertising Markets



Intent to Visit Coastal Mississippi in the Next 18 Months

Base: Residents of Coastal Mississippi's Regional Advertising Markets



*Percent of respondents who indicated they will 'definitely will' or 'probably will' visit Coastal Mississippi in the next 18 months

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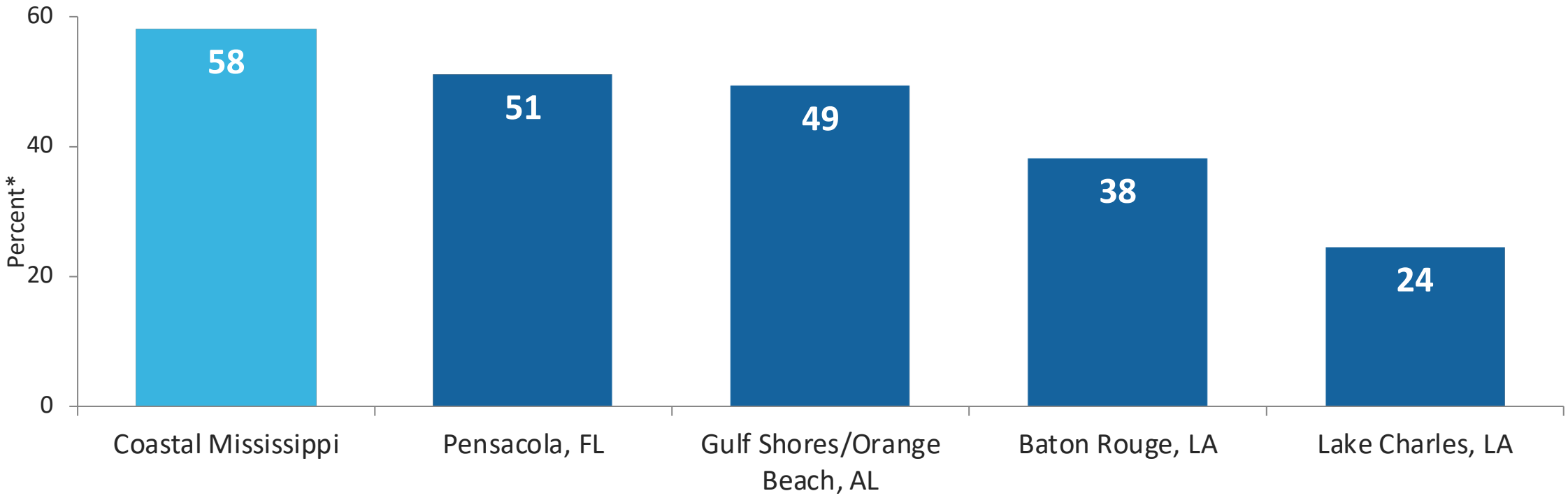
Intent to Visit Destination in the Next 18 Months

Base: Residents of Coastal Mississippi's Regional Advertising Markets



*Percent of respondents who indicated they will 'definitely will' or 'probably will' visit the destination in the next 18 months on a day or overnight leisure trip

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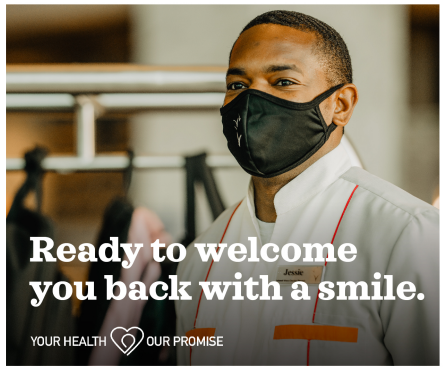

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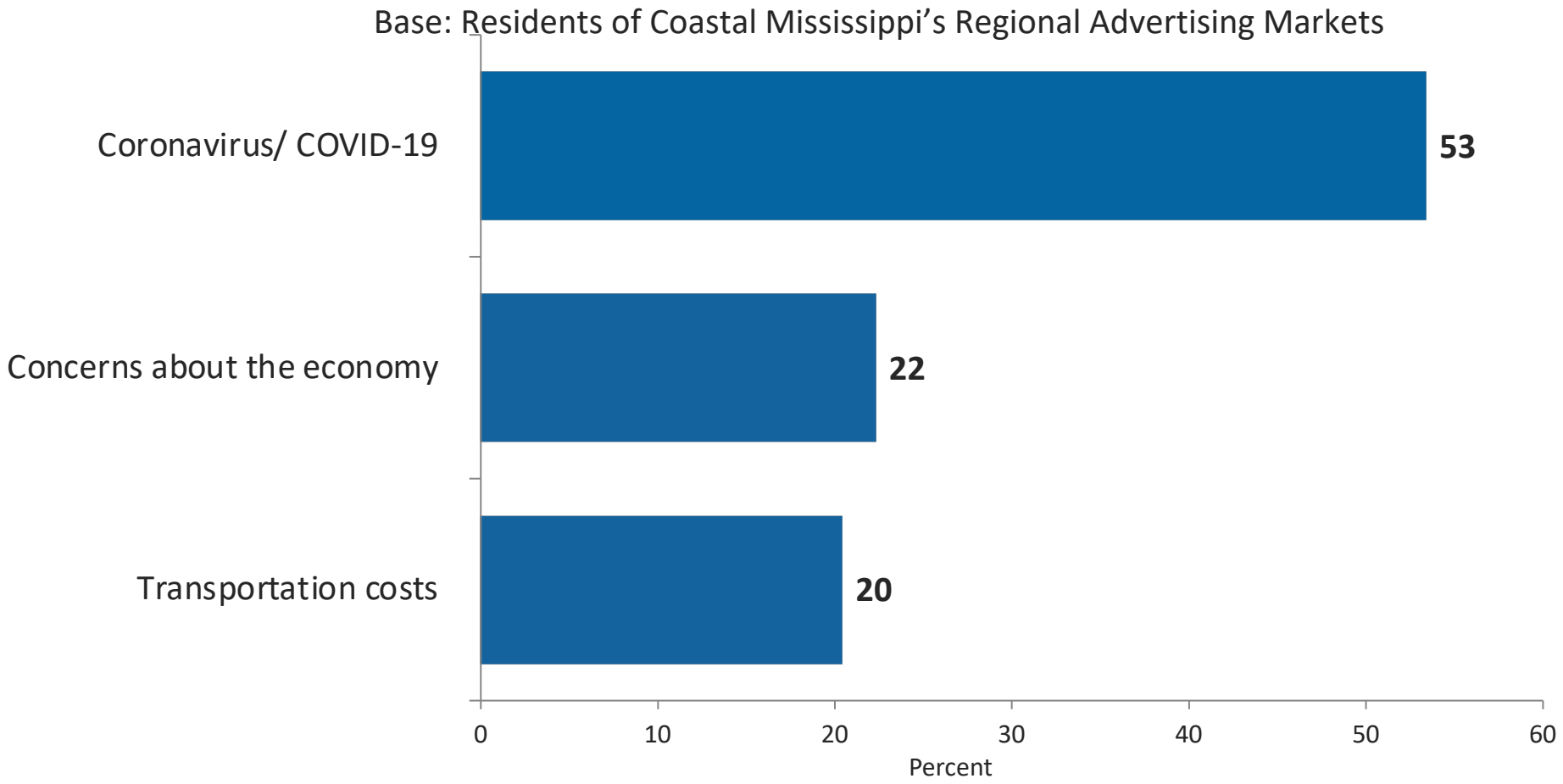
Impact of COVID-19 on Travel Plans

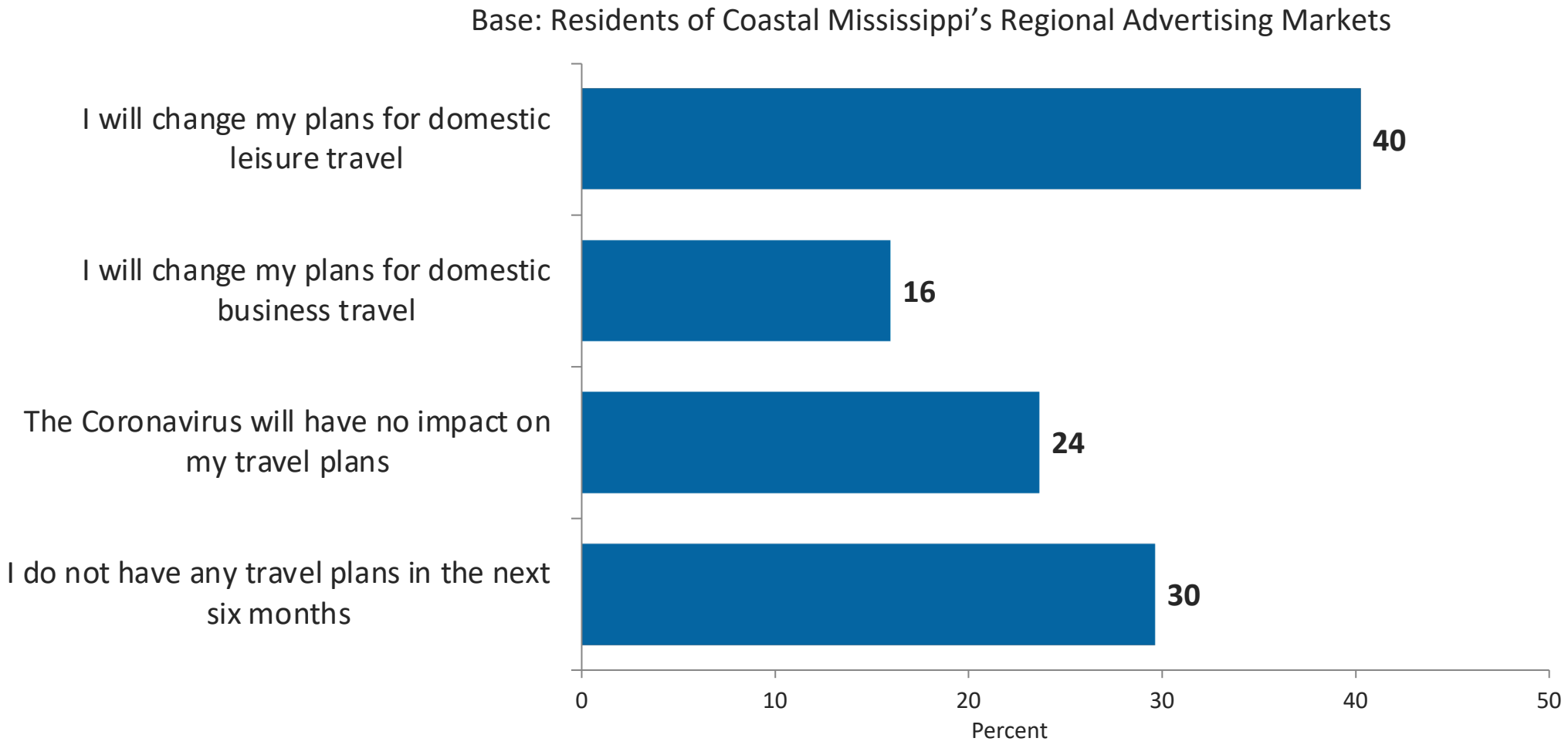
Impact of COVID-19

- Just over half (53%) of travelers in Coastal Mississippi's drive markets said COVID-19 would greatly impact their travel plans. Under one quarter reported concerns about the economy (22%) and transportation costs (20%) would greatly impact their travel plans.
- During the next six months, four in ten travelers in Coastal Mississippi's drive markets (40%) will change their domestic leisure travel plans because of COVID-19 concerns and less than two in ten will change their domestic business travel plans. A quarter (24%) asserts COVID-19 will have no impact on their travel plans, while almost a third (30%) don't have any travel plans during the next six months.
- Among those who indicated they would change their travel plans, six in ten (58%) are reducing their travel and four in ten (41%) canceled trips completely.
- Six in ten (61%) travelers in Coastal Mississippi's drive markets are hesitant to travel during the next six months. Three-fourths (74%) are hesitant over concerns about spreading/contracting COVID-19.

Indicated the Following Would Greatly Impact Travel Plans

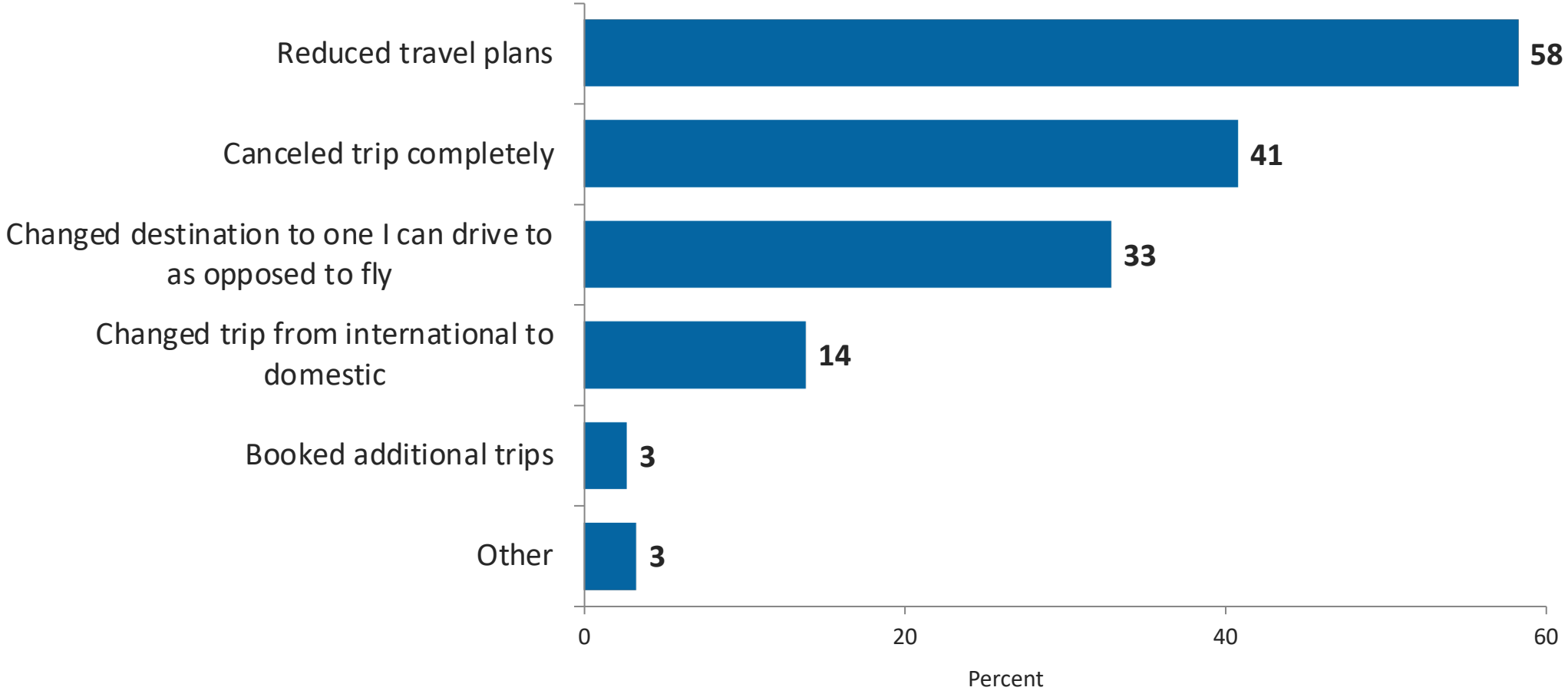


How the Coronavirus/COVID-19 will Impact Domestic Travel Plans over the Next Six Months



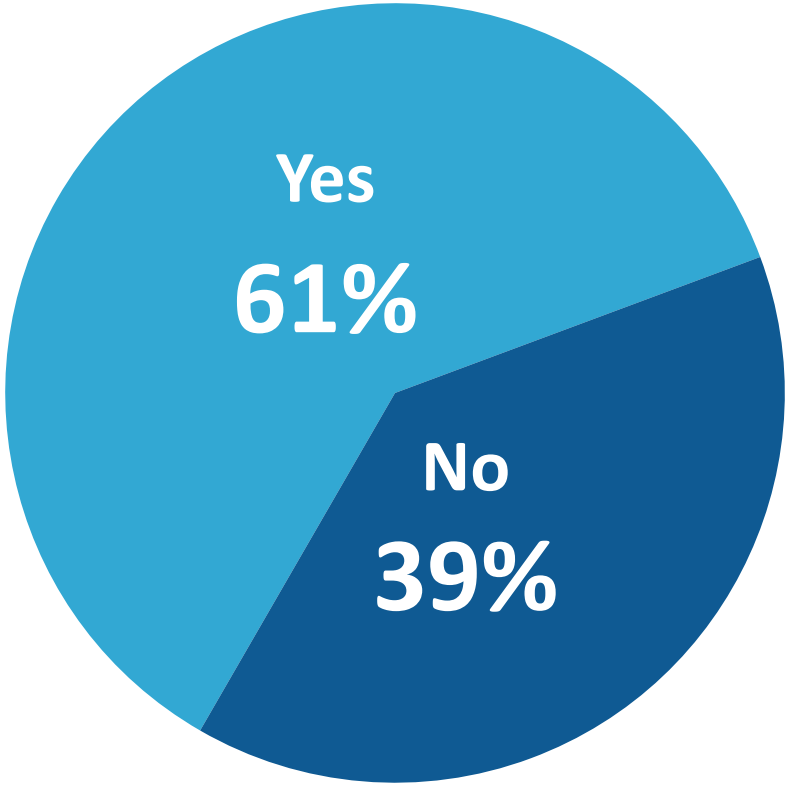
How Respondents Changed Plans

Base: Residents of Coastal Mississippi's Regional Advertising Markets who Indicated They Will Change Travel Plans



Are You Hesitant to Travel in the Next Six Months?

Base: Residents of Coastal Mississippi's Regional Advertising Markets



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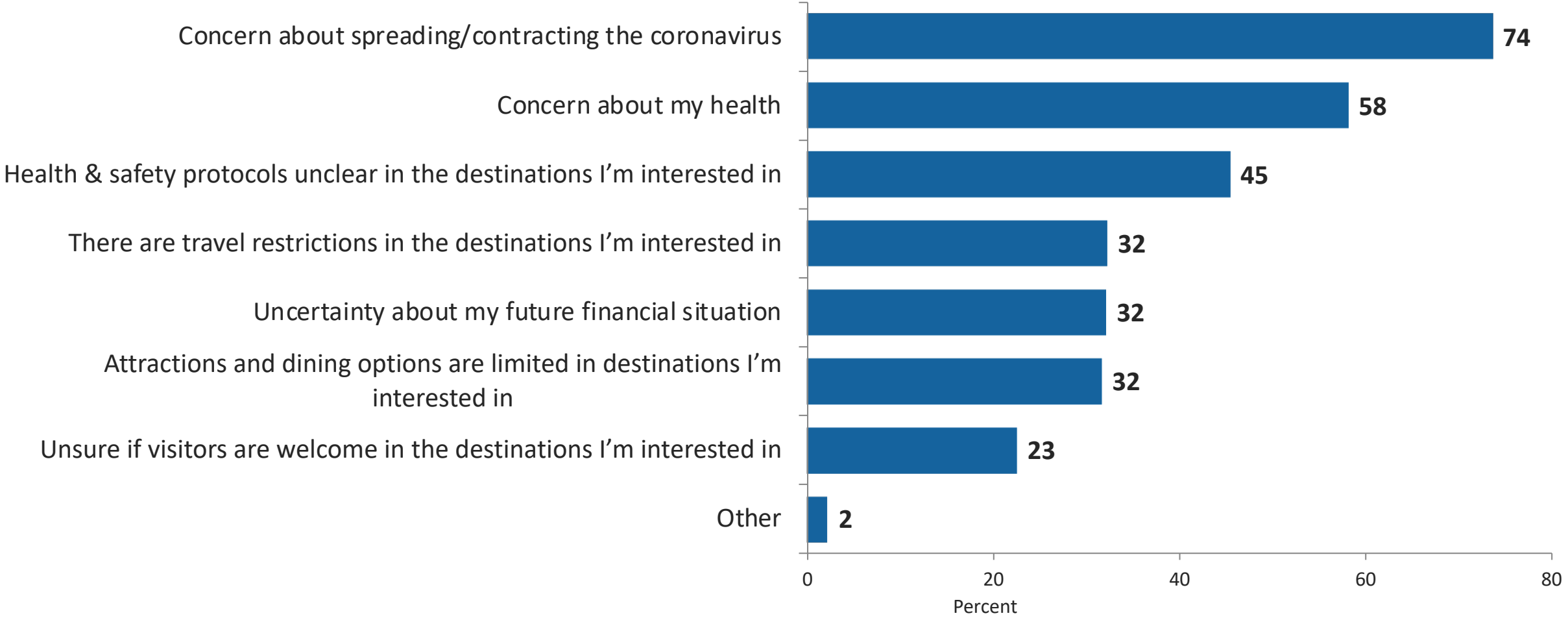
Factors Preventing Respondents from Taking a Trip

Base: Residents of Coastal Mississippi's Regional Advertising Markets Who Were Hesitant to Travel



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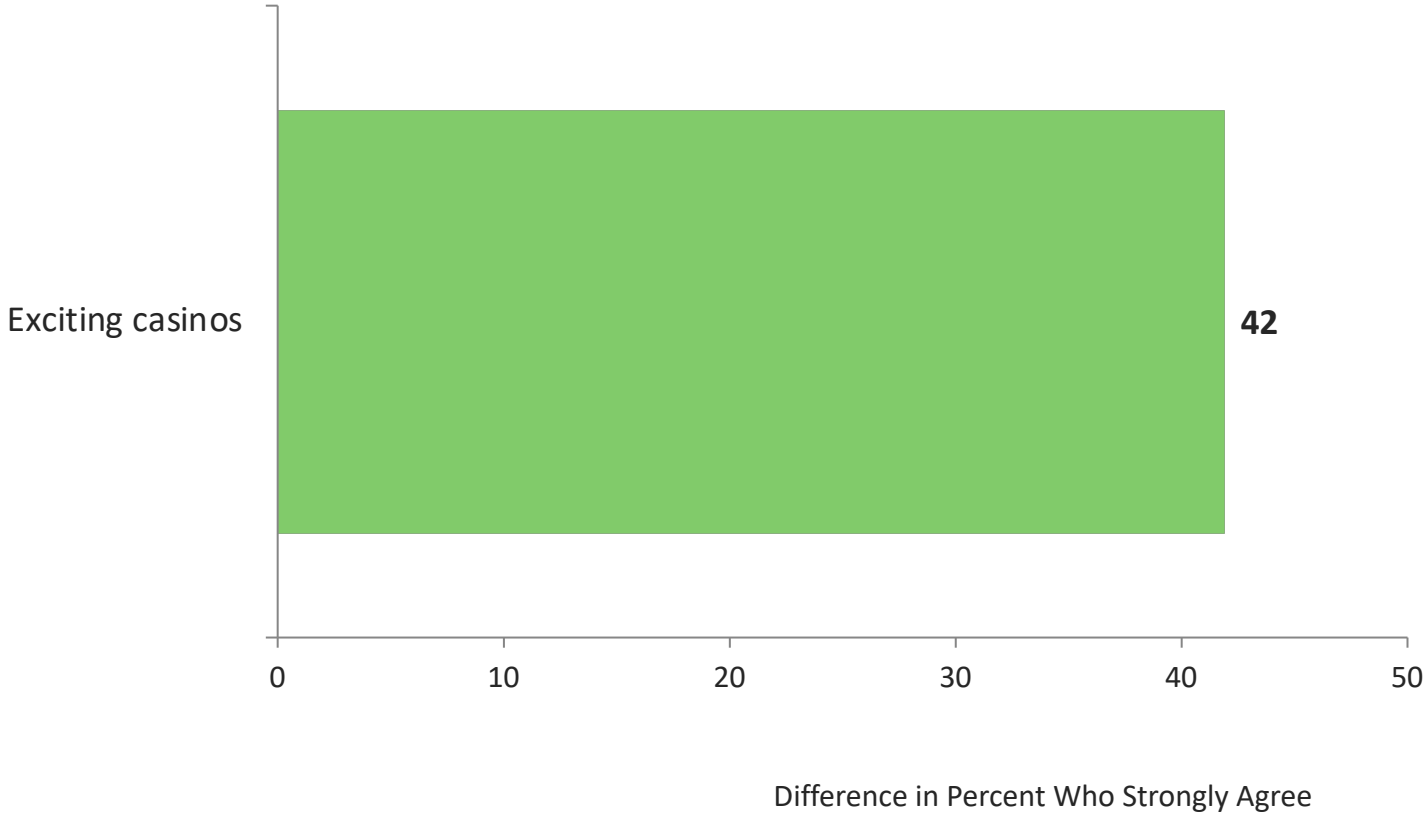
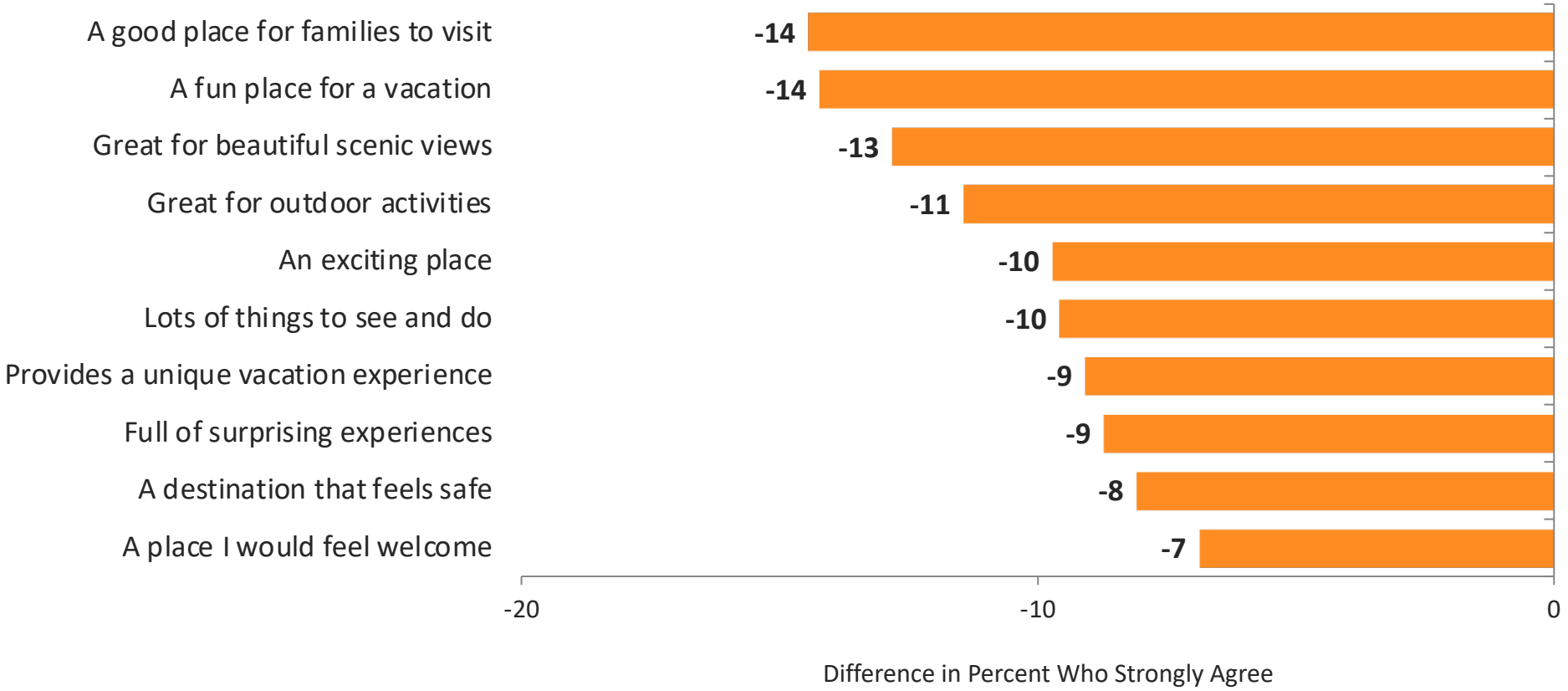
Appendix I: Coastal Mississippi's Image Strengths & Weaknesses vs. Individual Competitors

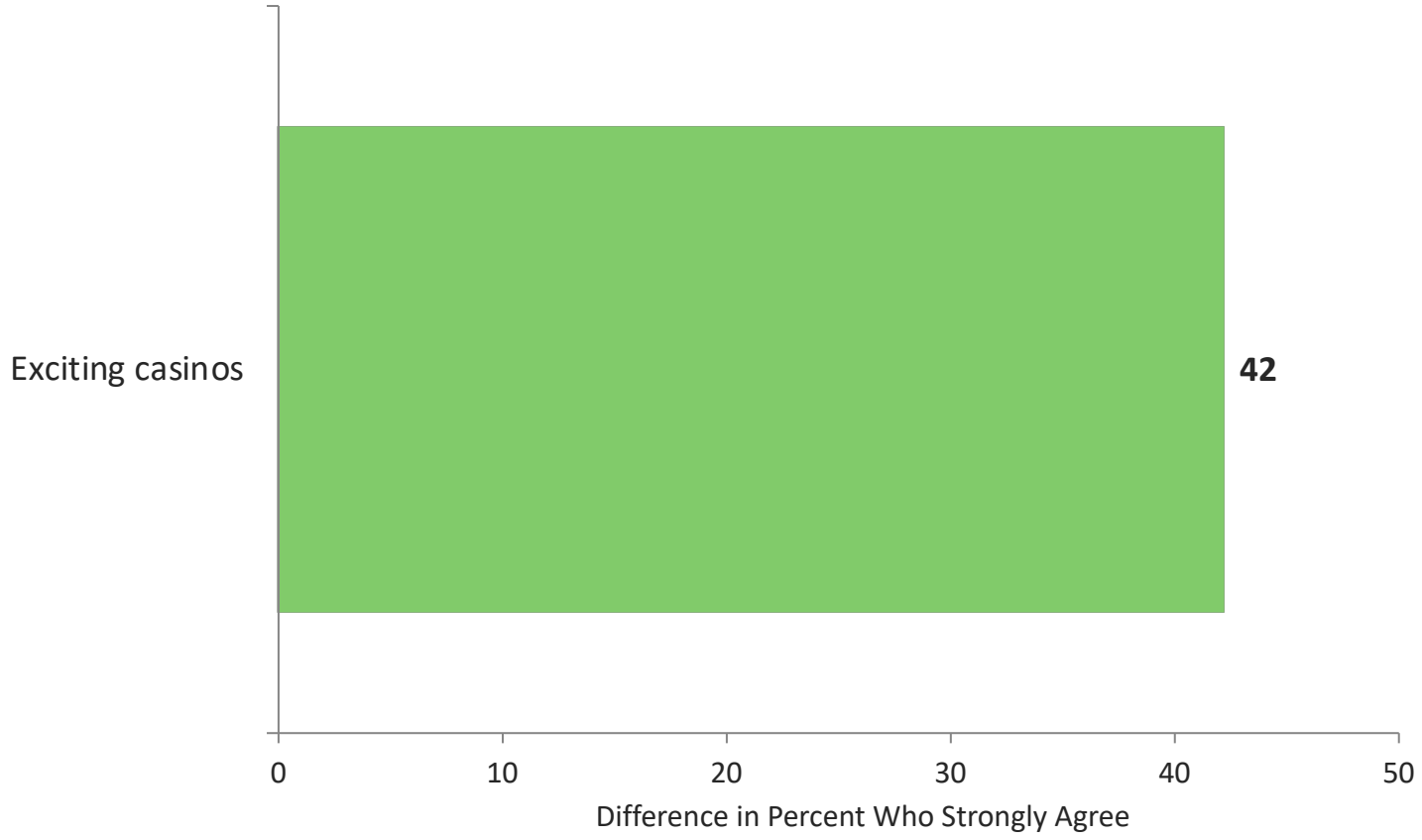
Coastal Mississippi's Image Strengths vs. Gulf Shores/Orange Beach, AL



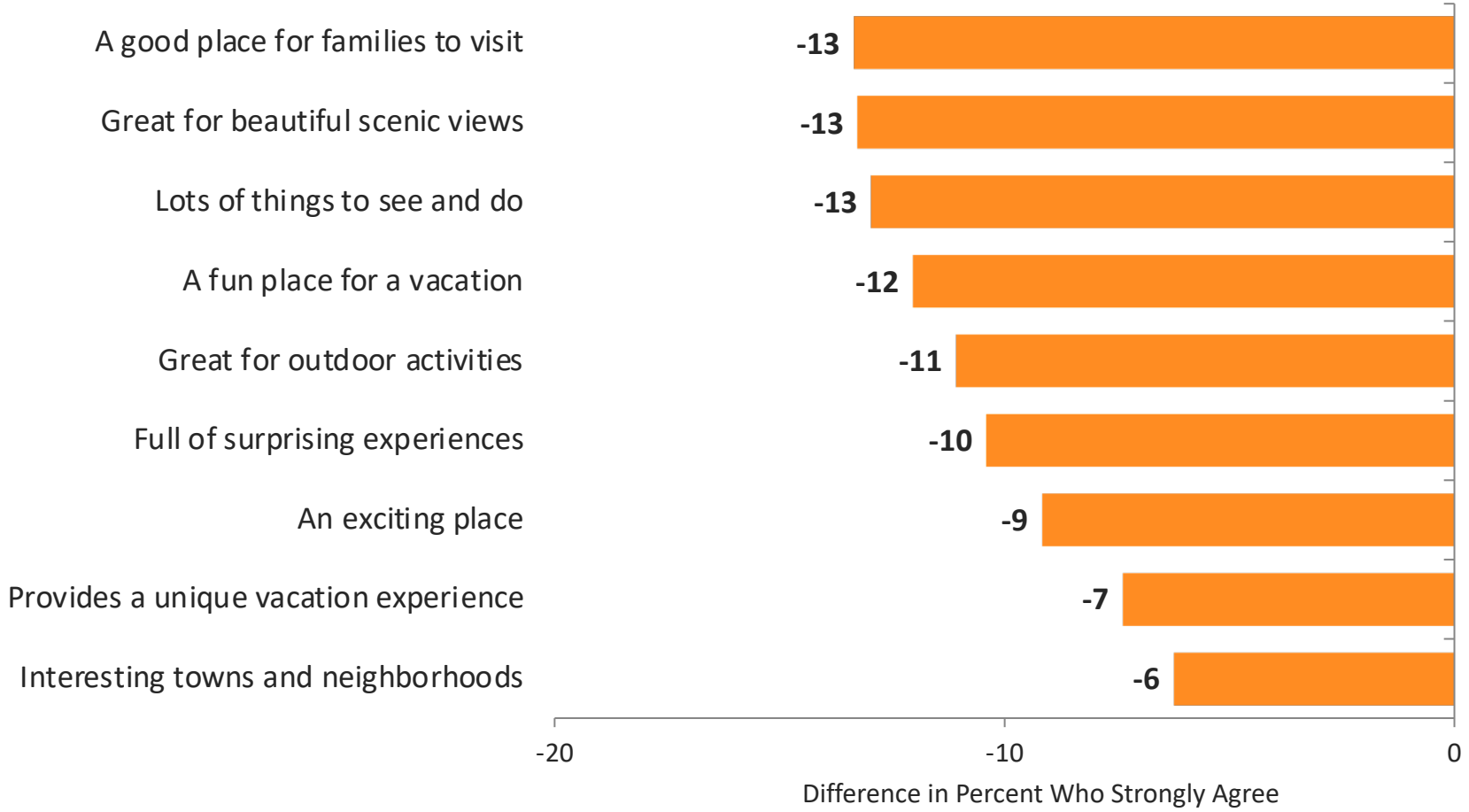
Coastal Mississippi's Image Weaknesses vs. Gulf Shores/Orange Beach, AL



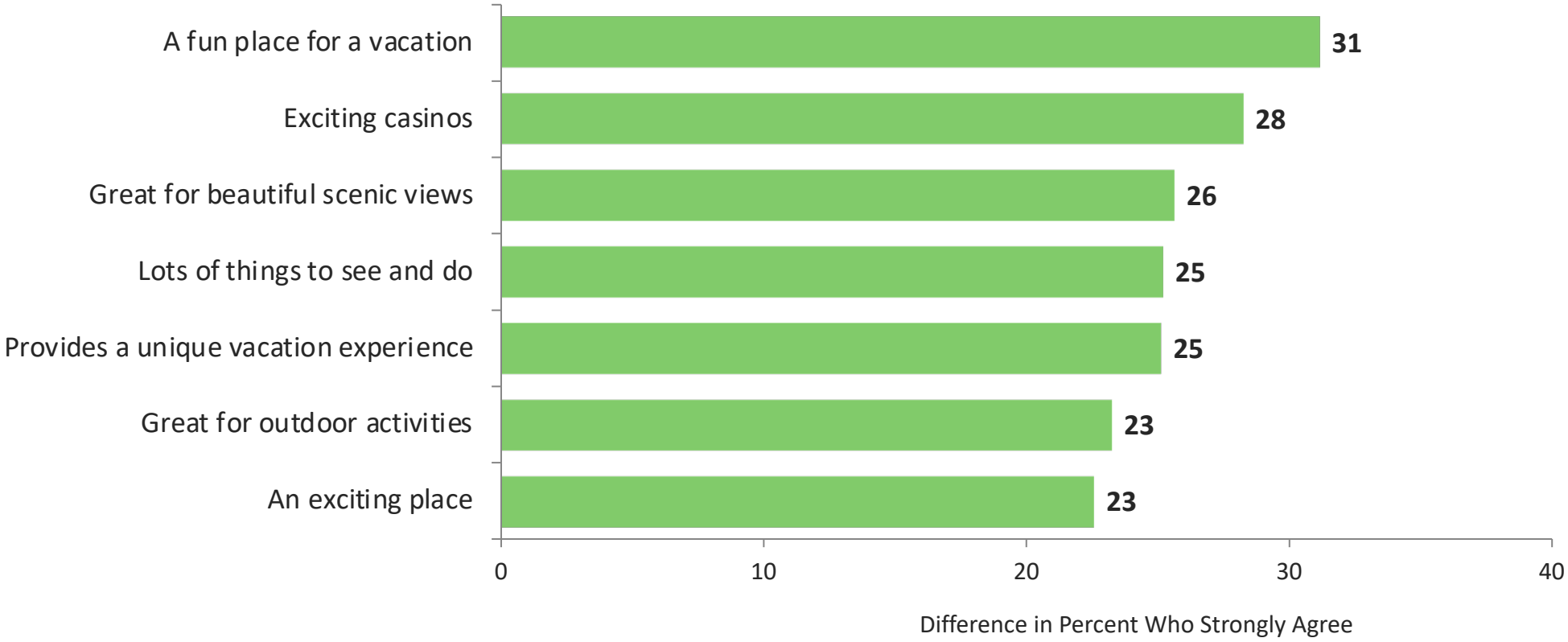
Coastal Mississippi's Image Strengths vs. Pensacola, FL



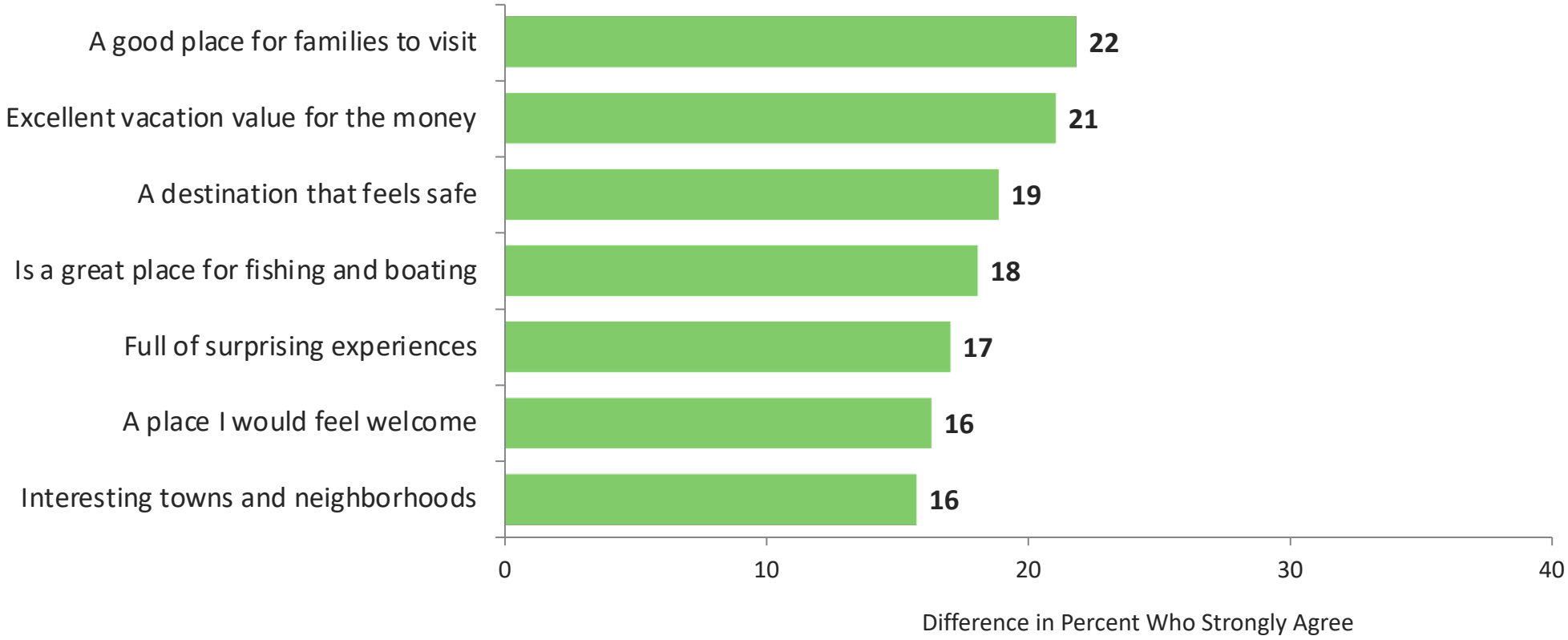
Coastal Mississippi's Image Weaknesses vs. Pensacola, FL



Coastal Mississippi's Image Strengths vs. Lake Charles, LA



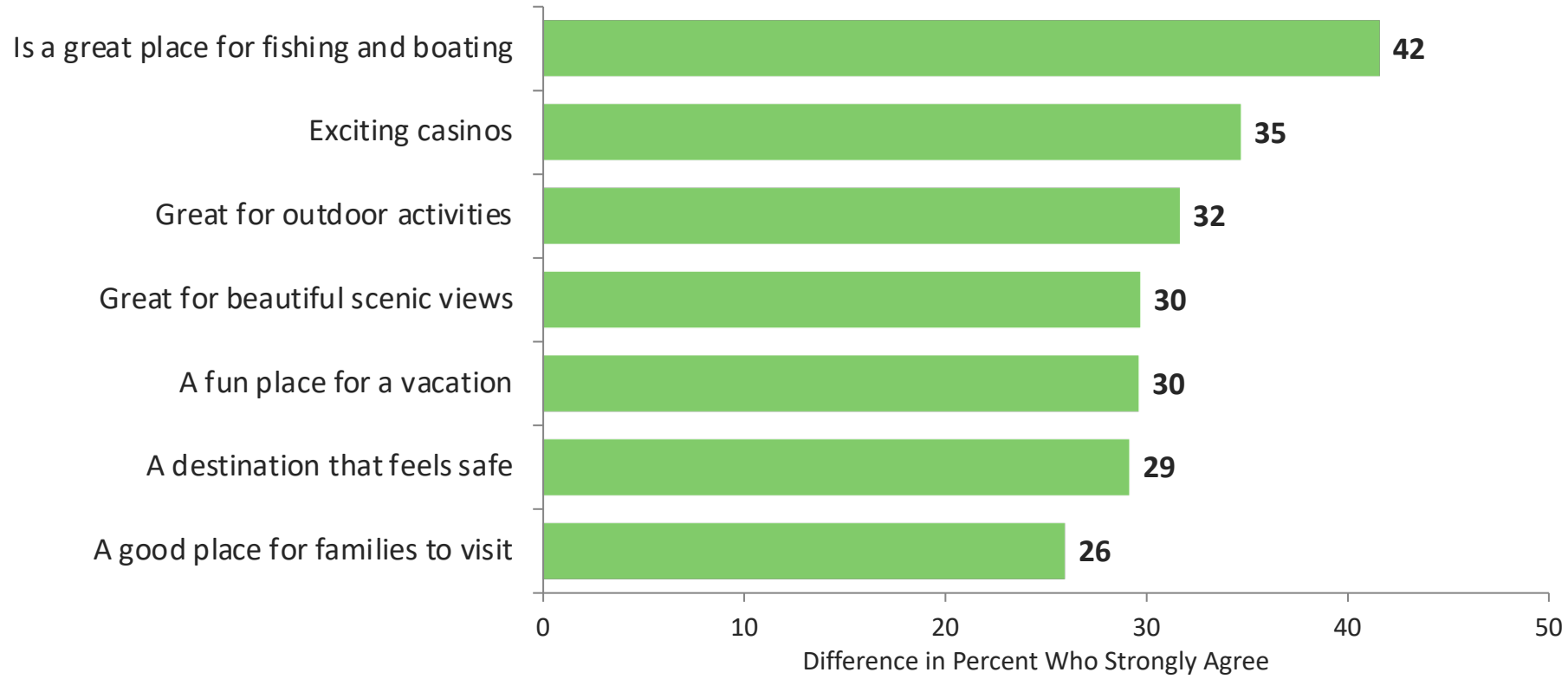
Coastal Mississippi's Image Strengths vs. Lake Charles, LA (Cont'd)



Coastal Mississippi's Image Weaknesses vs. Lake Charles, LA

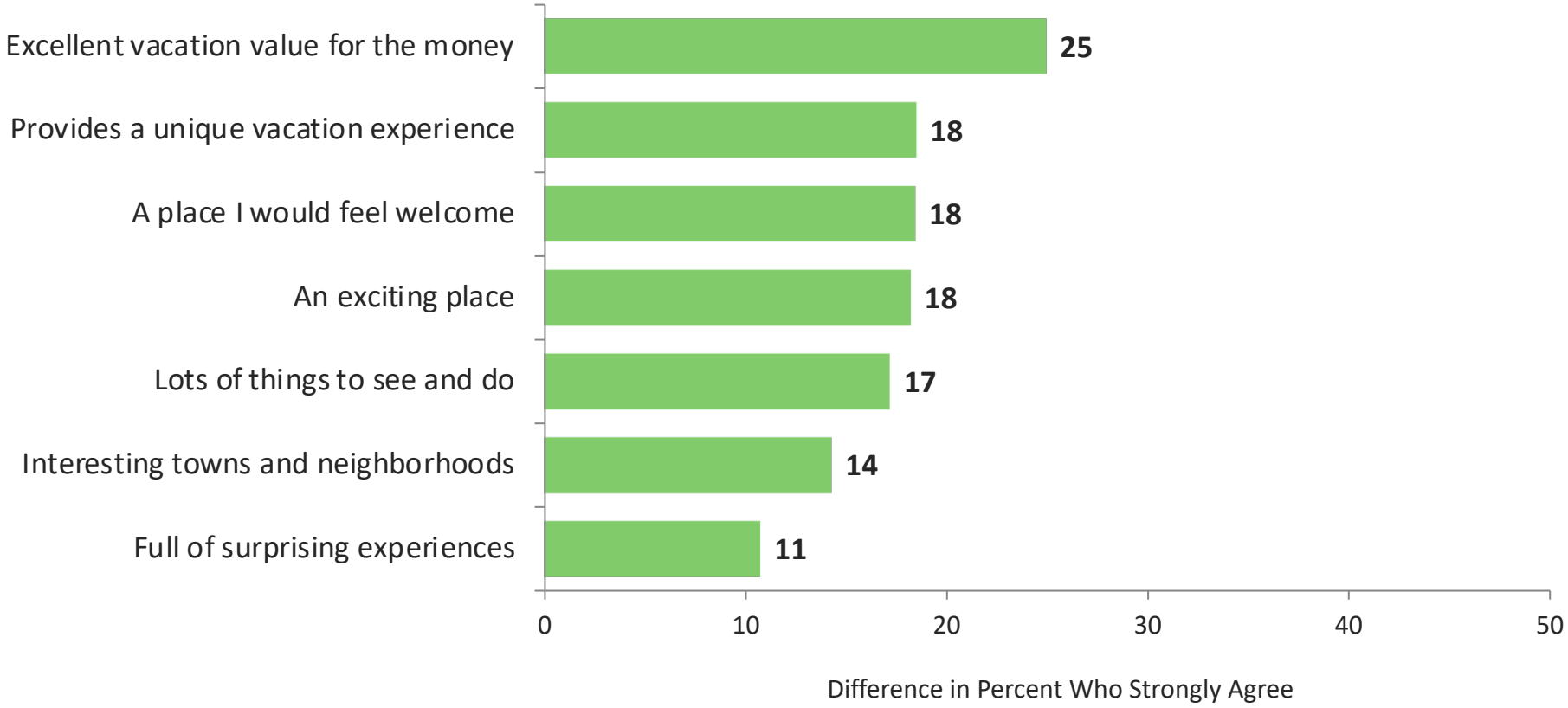
THERE WERE NO SIGNIFICANT PERCEIVED IMAGE WEAKNESSES VS. LAKE CHARLES

Coastal Mississippi's Image Strengths vs. Baton Rouge, LA



Longwoods INTERNATIONAL

Coastal Mississippi's Image Strengths vs. Baton Rouge, LA (Cont'd)



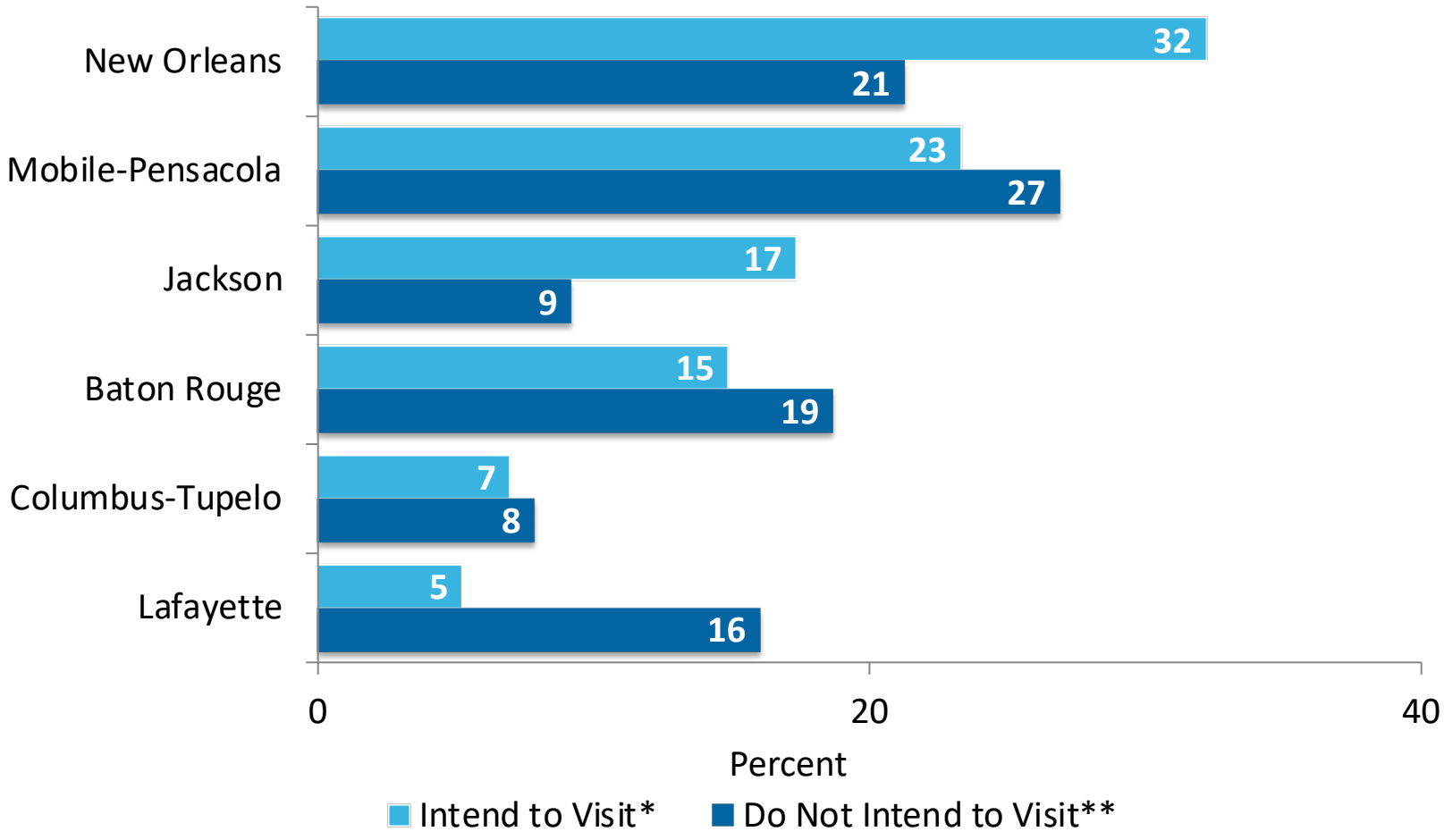
Coastal Mississippi's Image Weaknesses vs. Baton Rouge, LA

THERE WERE NO SIGNIFICANT PERCEIVED IMAGE WEAKNESSES VS. BATON ROUGE

Longwoods INTERNATIONAL

Appendix II: Demographics of Intended Travelers

DMA of Residence



*Indicated that they Definitely or Probably Will Visit Coastal Mississippi in the next 18 months
**Indicated that they Definitely or Probably Will Not Visit Coastal Mississippi in the next 18 months

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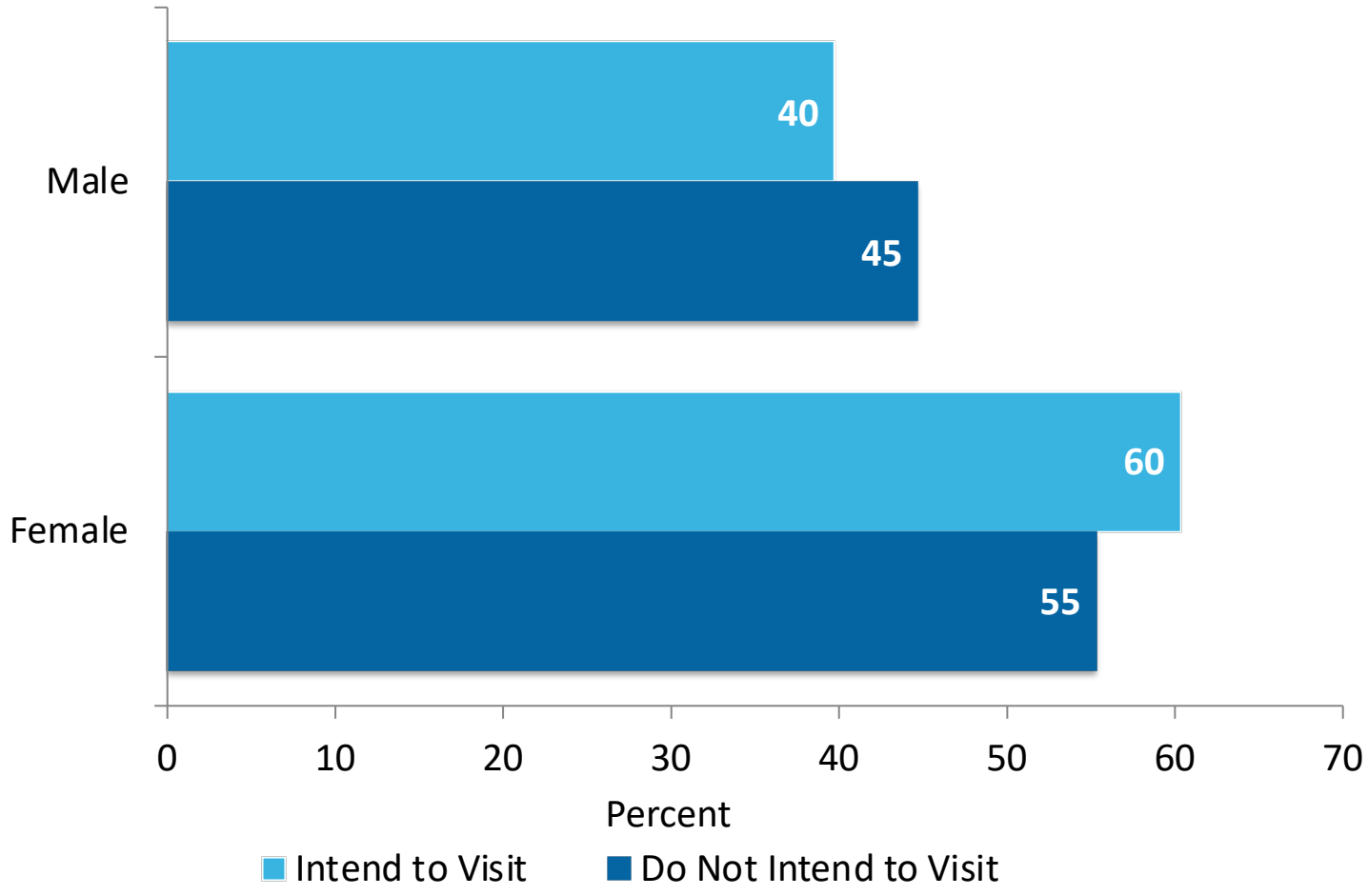
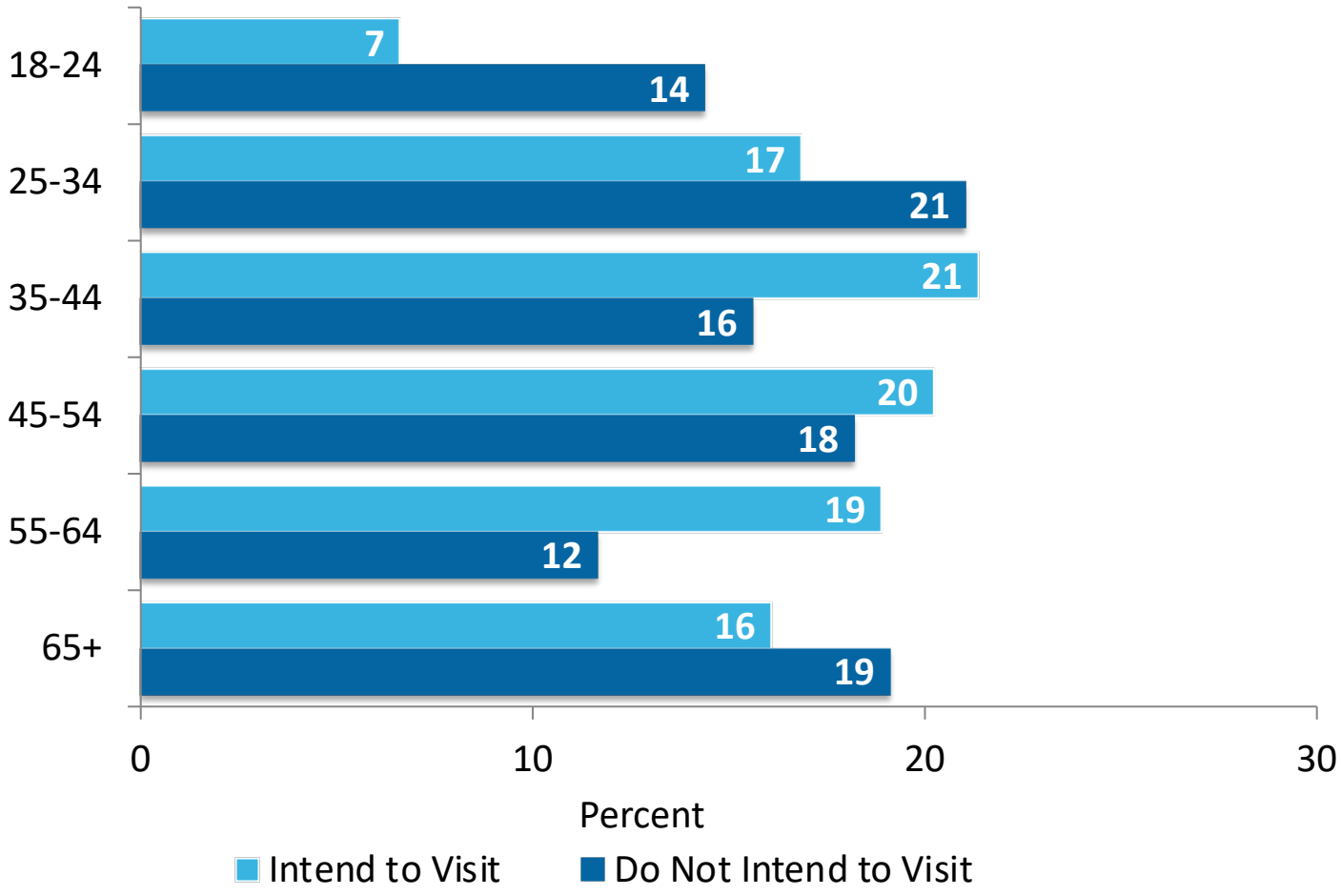
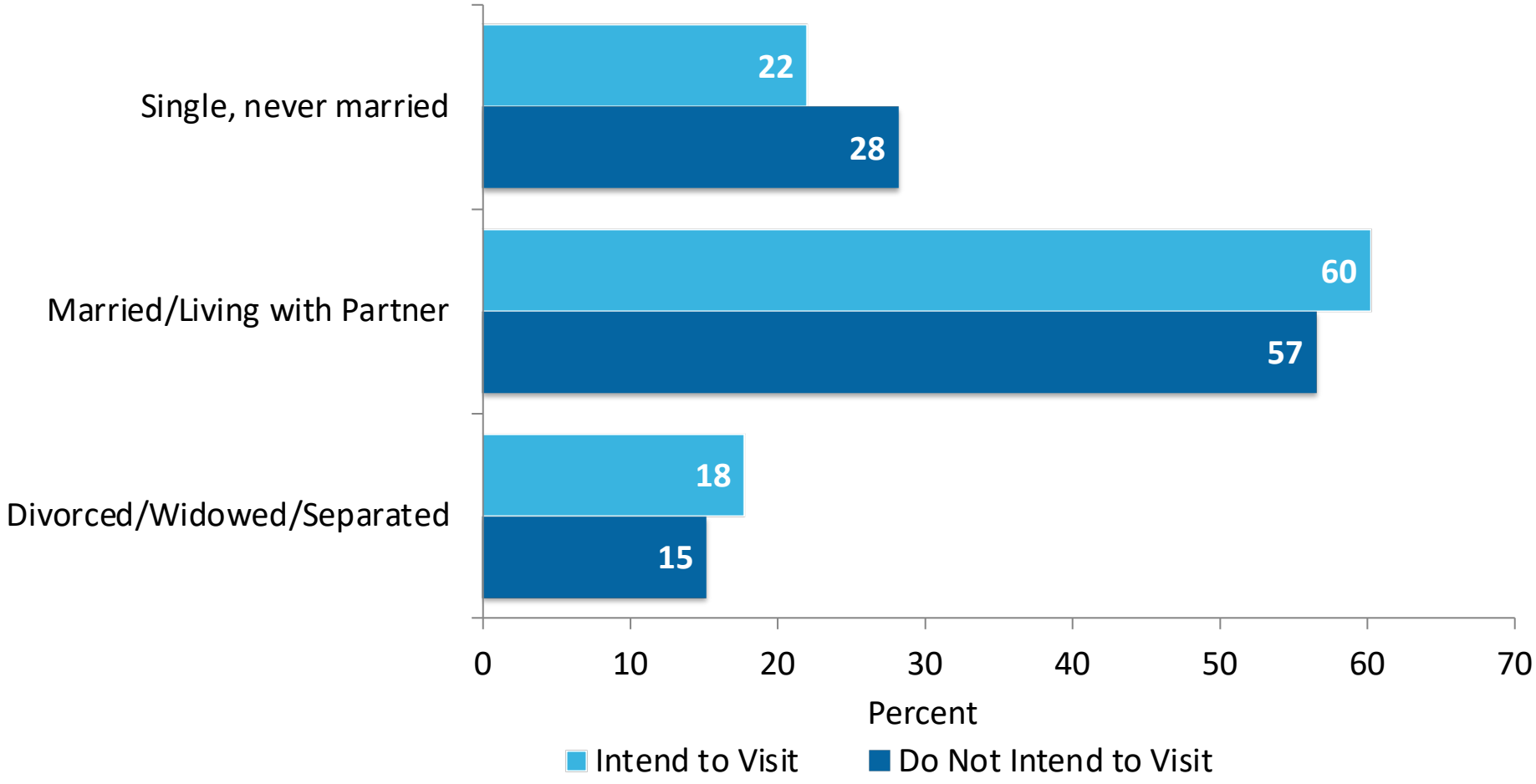
Gender


Male
40
45
Female
60
55
0
10
20
30
40
50
60
70
Percent
Intend to Visit
Do Not Intend to Visit

Age


18-24
25-34
35-44
45-54
55-64
65+
7
14
17
21
21
16
20
18
19
12
16
19
0
10
20
30
Percent
Intend to Visit
Do Not Intend to Visit

Marital Status



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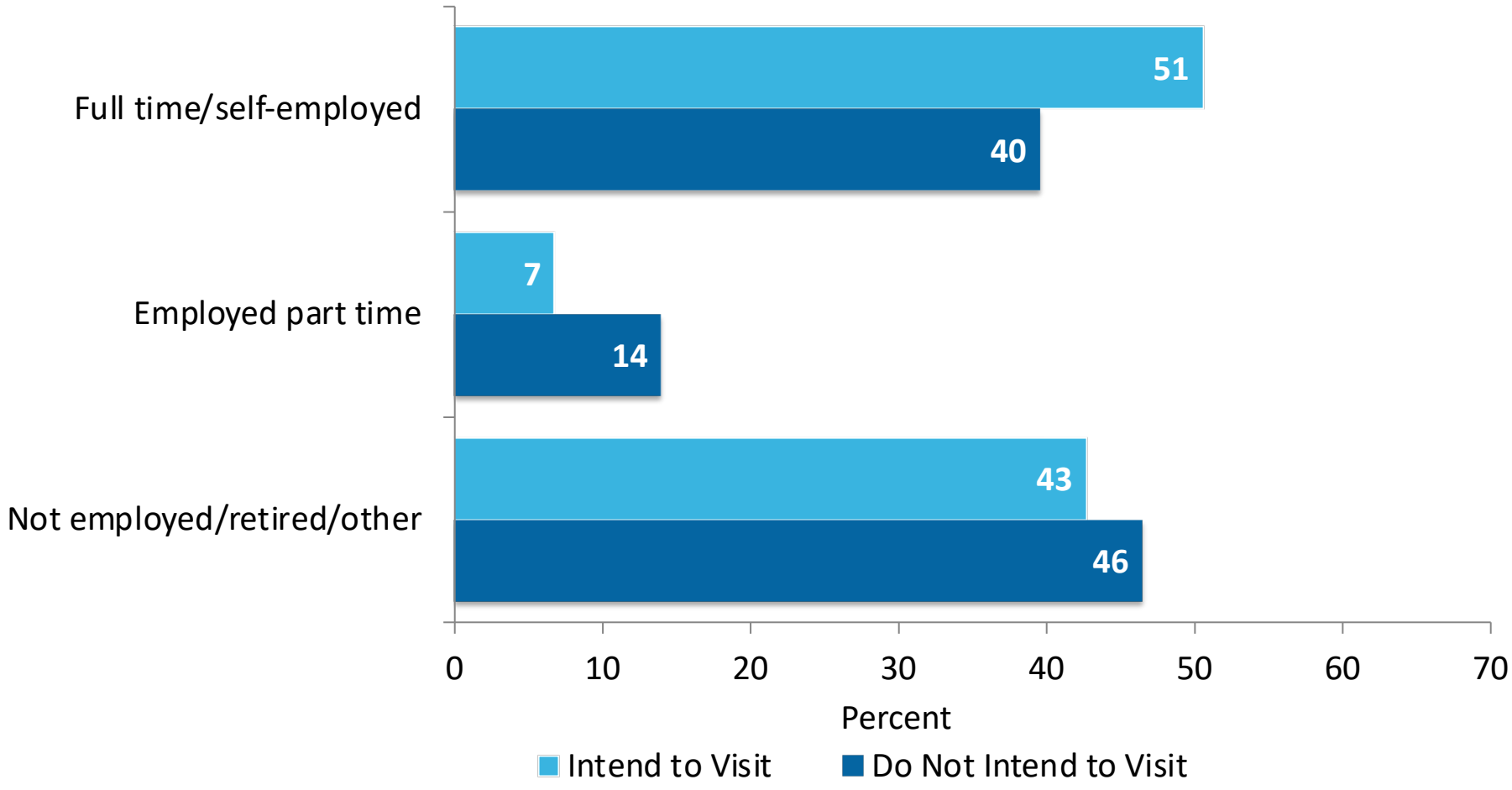
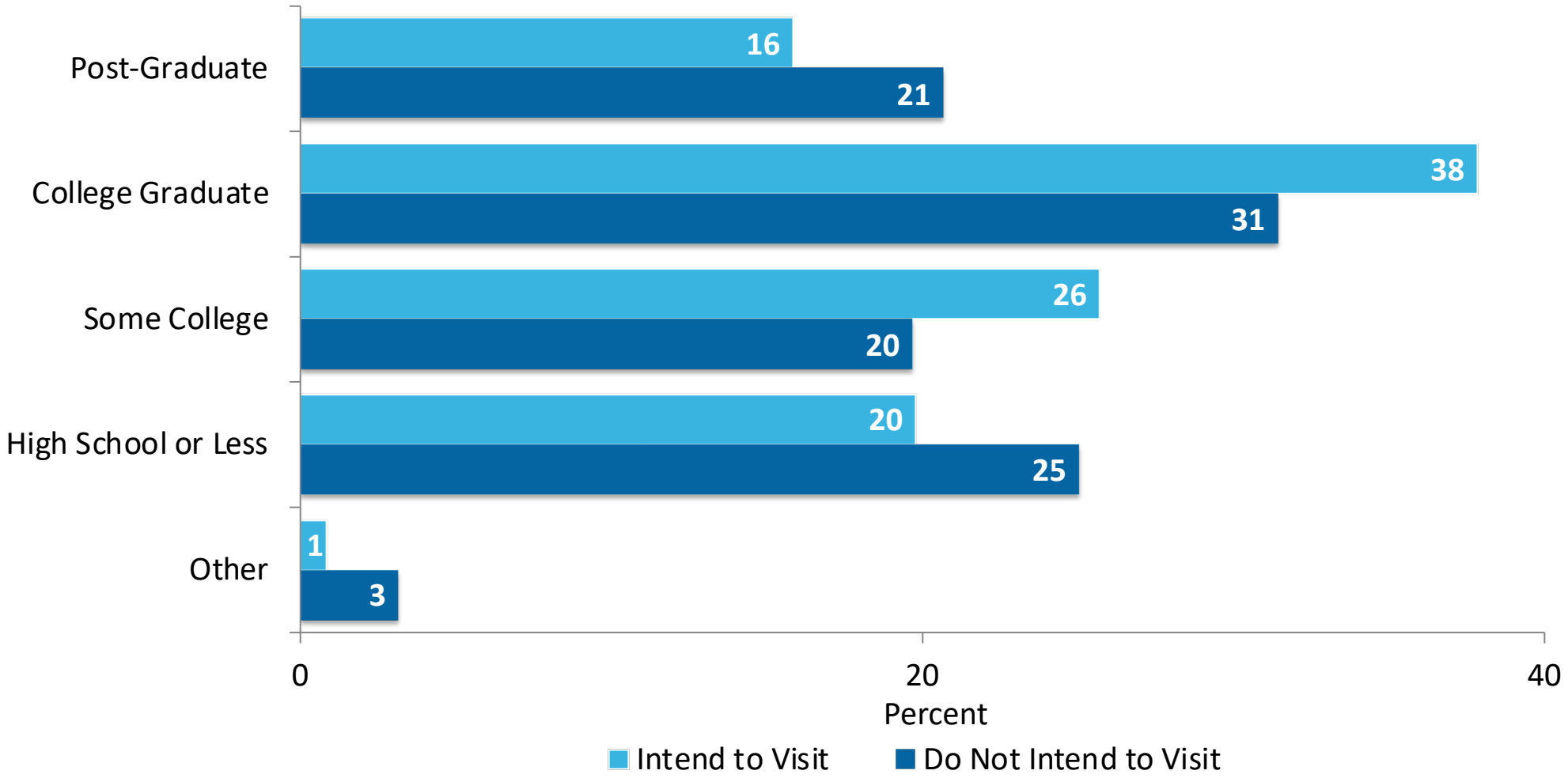
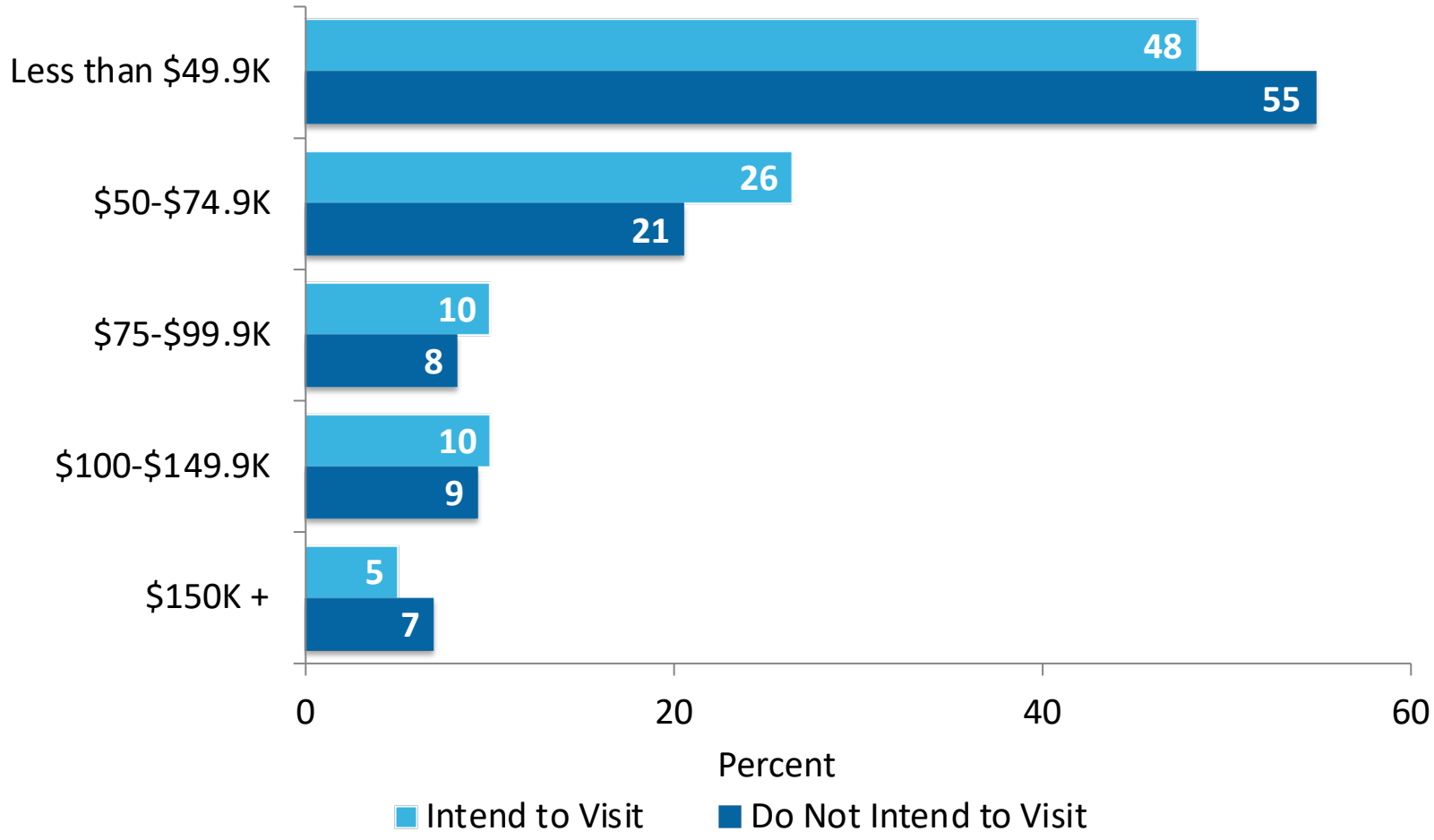
Employment Status



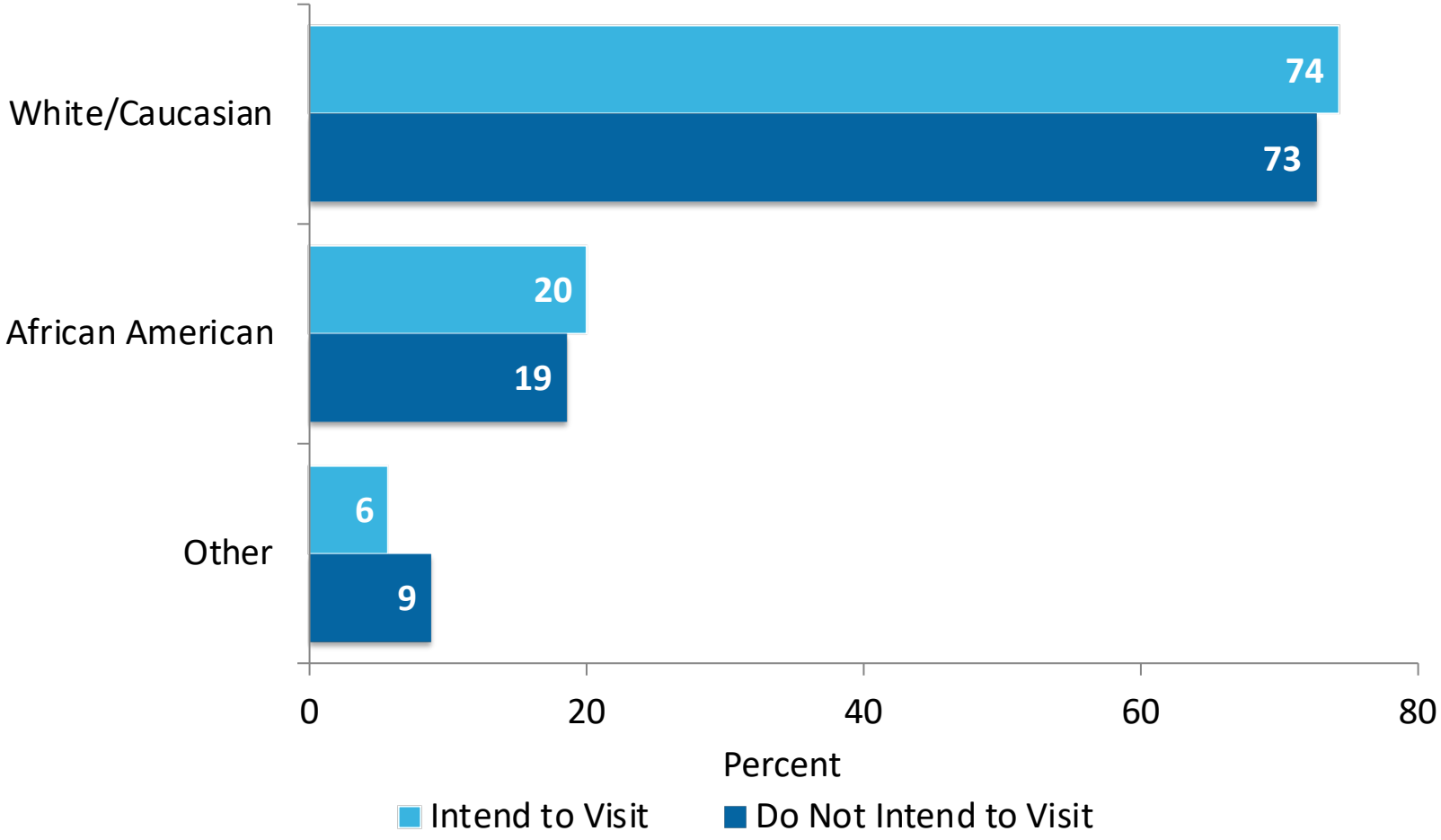
Education


Post-Graduate
16
21
College Graduate
38
31
Some College
26
20
High School or Less
20
25
Other
1
3
0
20
40
Percent
Intend to Visit
Do Not Intend to Visit

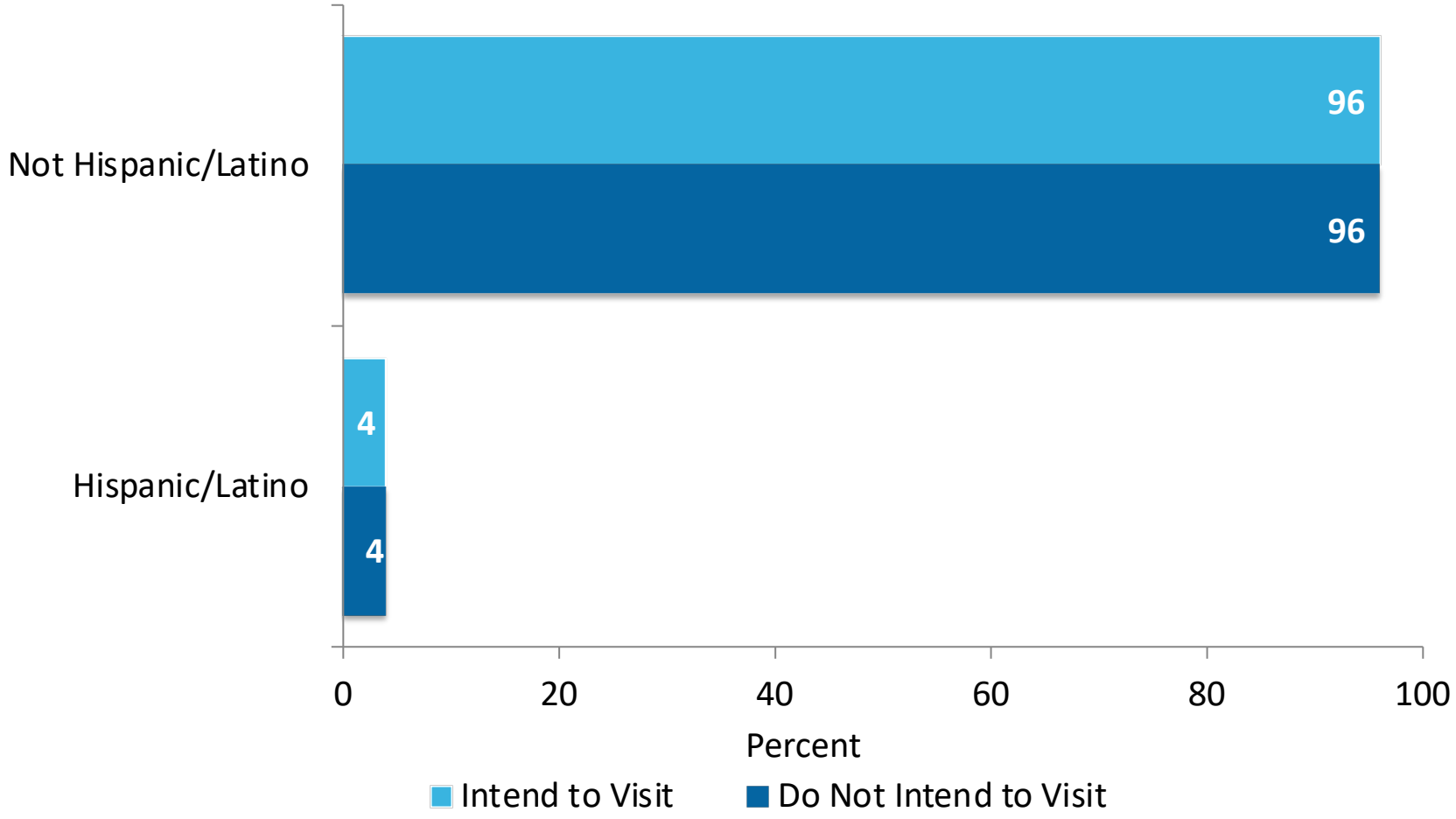
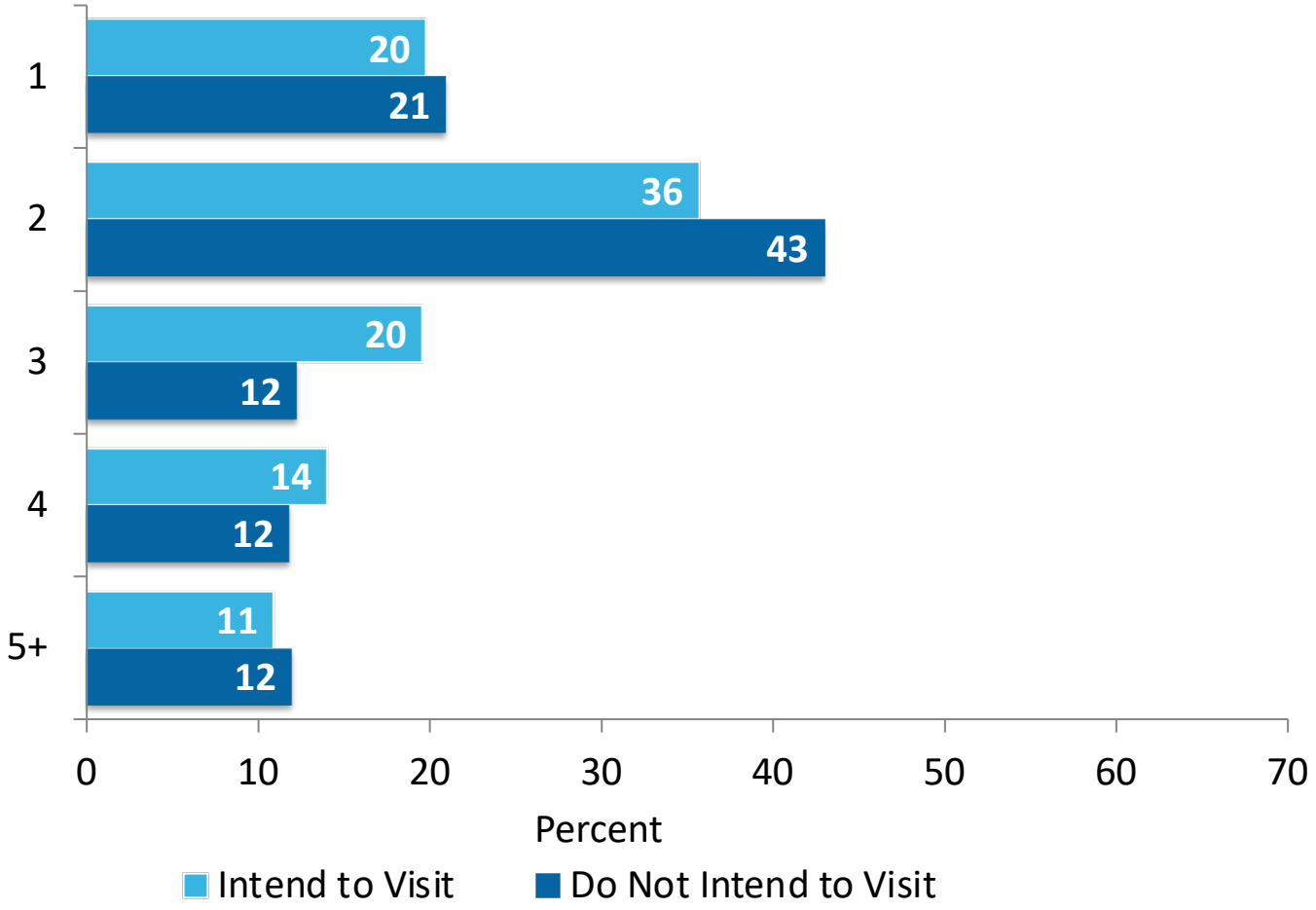
Income


Less than $49.9K
48
55
$50-$74.9K
26
21
$75-$99.9K
10
8
$100-$149.9K
10
9
$150K +
5
7
0
20
40
60
Percent
Intend to Visit
Do Not Intend to Visit

Ethnicity


White/Caucasian
74
73
African American
20
19
Other
6
9
0
20
40
60
80
Percent
Intend to Visit
Do Not Intend to Visit

Hispanic Background



Household Size