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VISIT MISSISSIPPI
GULF COAST

# 2015 Mississippi Gulf Coast Awareness and Image Study

**February 2016**

# Table of Contents

# Introduction

- Longwoods International was retained to undertake an evaluation of Mississippi Gulf Coast's image and awareness of 2015 tourism advertising campaign.

- This report presents the detailed study findings as they relate to:
    - *Mississippi Gulf Coast's image as a travel destination vs Gulf Shores/Orange Beach, AL, Pensacola/Panhandle, FL, Charleston/Savannah, SC, and Myrtle Beach, SC.*
    - *Impact on image of travelers who have seen the Mississippi Gulf Coast campaign and separately those who have visited Mississippi Gulf Coast.*

# Purpose

- The research was designed to provide:

  - *Strategic image data*
    - *What are the image factors and attributes that are important in destination selection?*
    - *What is Mississippi Gulf Coast's image as a travel destination versus Gulf Shores/Orange Beach, AL, Pensacola/Panhandle, FL, Charleston/Savannah, SC, and Myrtle Beach, SC?*

  - *A measure of the impacts of Mississippi Gulf Coast's tourism advertising:*
    - *Awareness/recall of the 2015 campaign*
    - *Impact on image of the campaign of those aware and those who have visited Mississippi Gulf Coast*

# Methodology

- The study surveyed travelers in Mississippi Gulf Coast's advertising markets:

  - *A **traveler** is defined as a person who has taken a day or overnight pleasure trip within the past 3 years, and intends to take one within the next two years. (62% of those screened met these requirements.)*

- The study was conducted via a major online consumer sample in the U.S.:

  - *The sample was selected to be representative of the markets being surveyed **Outer Markets** – Houston DMA, Atlanta DMA, Birmingham DMA, Memphis DMA, Little Rock DMA and **Inner Markets** – New Orleans DMA, Mobile DMA, Baton Rouge DMA, Jackson, MS DMA, Tallahassee DMA, Montgomery DMA, Lafayette DMA, Columbus, GA DMA, Columbus-Tupelo, MS DMA, Monroe, LA DMA, Panama City DMA, Hattiesburg DMA, Lake Charles DMA, Dothan DMA, Alexandria DMA, Greenwood-Greenville, MS DMA, Meridian DMA.*

  - *A total of **1,000** travelers participated in the study.*

# Methodology (Cont'd)

- *Data was weighted prior to analysis based on age, gender, income, household size, and market size.*

- The questionnaire included:

  - *Travel history*

  - *Image of Mississippi Gulf Coast, Gulf Shores/Orange Beach, AL, Pensacola/Panhandle, FL, Charleston/Savannah, SC, and Myrtle Beach, SC as a travel destination on a battery of 59 attributes.*

  - *Respondents were exposed to actual copies of Mississippi Gulf Coast's tourism ads. We use this aided recognition technique in order to minimize potential confusion of Mississippi Gulf Coast's ads with other destinations/advertisers that may be similar.*

# Key Findings

# Key Findings

- The Mississippi Gulf Coast's advertising campaign produced a good awareness level of 42%.

- The advertising campaign improved the Mississippi Gulf Coast's image substantially and significantly improved the intent to visit the Mississippi Gulf Coast, including over 254,000 trips in the short term with intention of up to 485,000 trips in the next 12 months.

- The Mississippi Gulf Coast's advertising provided a good economic return. The advertising generated an incremental $33 million in spending among visitors that would not have come to the Mississippi Gulf Coast without the advertising. This spending resulted in $1.2 million in incremental local tax revenue against the $760,310 advertising cost for 2:1 ratio - more than covering the advertising costs.

# Key Findings – Cont'd

- Although the Mississippi Gulf Coast could easily continue the same campaign with little downside risk, there are some areas that suggest tweaking of message communication and voice could improve results:

  - *Increased spending is suggested, there is room to grow the awareness. Interestingly the ad awareness is similar among both the inner and outer markets. Those aware of the advertising are more likely to have a higher image rating than those not aware of the advertising.*

  - *The Mississippi Gulf Coast is seen as being stronger than competitors on Affordable dimensions. It is rated significantly lower on Popular dimensions (well-known destination, popular with vacationers, notice advertising for the Mississippi Gulf Coast). Other dimensions, the Mississippi Gulf Coast is rated lower. Longwoods believes this results from lack of understanding and/or awareness of the Mississippi Gulf Coast features.*

# Key Findings – Cont'd

◉ Once travelers have recently visited the Mississippi Gulf Coast, their image ratings for the Mississippi Gulf Coast are much higher on all dimensions as compared to those who have not visited – the experience is much higher than expectations.  These differences are quite substantial.

◉ Previously identified weakness are overcome by experiencing the Mississippi Gulf Coast:

   ◉ *Well-known destination*

   ◉ *Popular with vacationers*

# Key Findings – Cont'd

- From a strategic point of view, this means that the Mississippi Gulf Coast can celebrate several important aspects of its product to correct misperceptions, since it can deliver on the promise with great confidence.

- The Mississippi Gulf Coast economic development image is positively impacted by the tourism advertising.  These numbers can be strengthened if the advertising and visitation lift can be improved.

# Destination Past Visitation, Satisfaction, & Interest

# Past and Future Visitation to Mississippi Gulf Coast and Trip Satisfaction

- Almost two-thirds (65%) travelers in the Mississippi Gulf Coast marketing area have experienced Mississippi Gulf Coast at least once. Only Pensacola/Panhandle FL has a higher ever visited rate (73%)

- Slightly more than half (52%) have visited the Mississippi Gulf Coast in the past 2 years.  These levels are higher than the competitive markets.

- Four out of ten (41%) of the travelers in this study intend to visit the Mississippi Gulf Coast in the next year.  This level is the middle of the competitive states

- The intent on visiting the Mississippi Gulf Coast for an overnight trip is 44% while a day trip is 36%.

- The Mississippi Gulf Coast traveler's satisfaction (% very satisfied) with the most recent trip is 59%, lower than all the competitors. Charleston/Savannah is the highest at 69%.

13

# Ever Visited — Day/Overnight Trip

**Base: Total travelers**



| Location | Percent |
|---|---|
| Pensacola/Panhandle, FL | 73 |
| Mississippi Gulf Coast | 65 |
| Gulf Shores/Orange Beach, AL | 56 |
| Charleston/Savannah, SC | 45 |
| Myrtle Beach, SC | 39 |

Percent

14
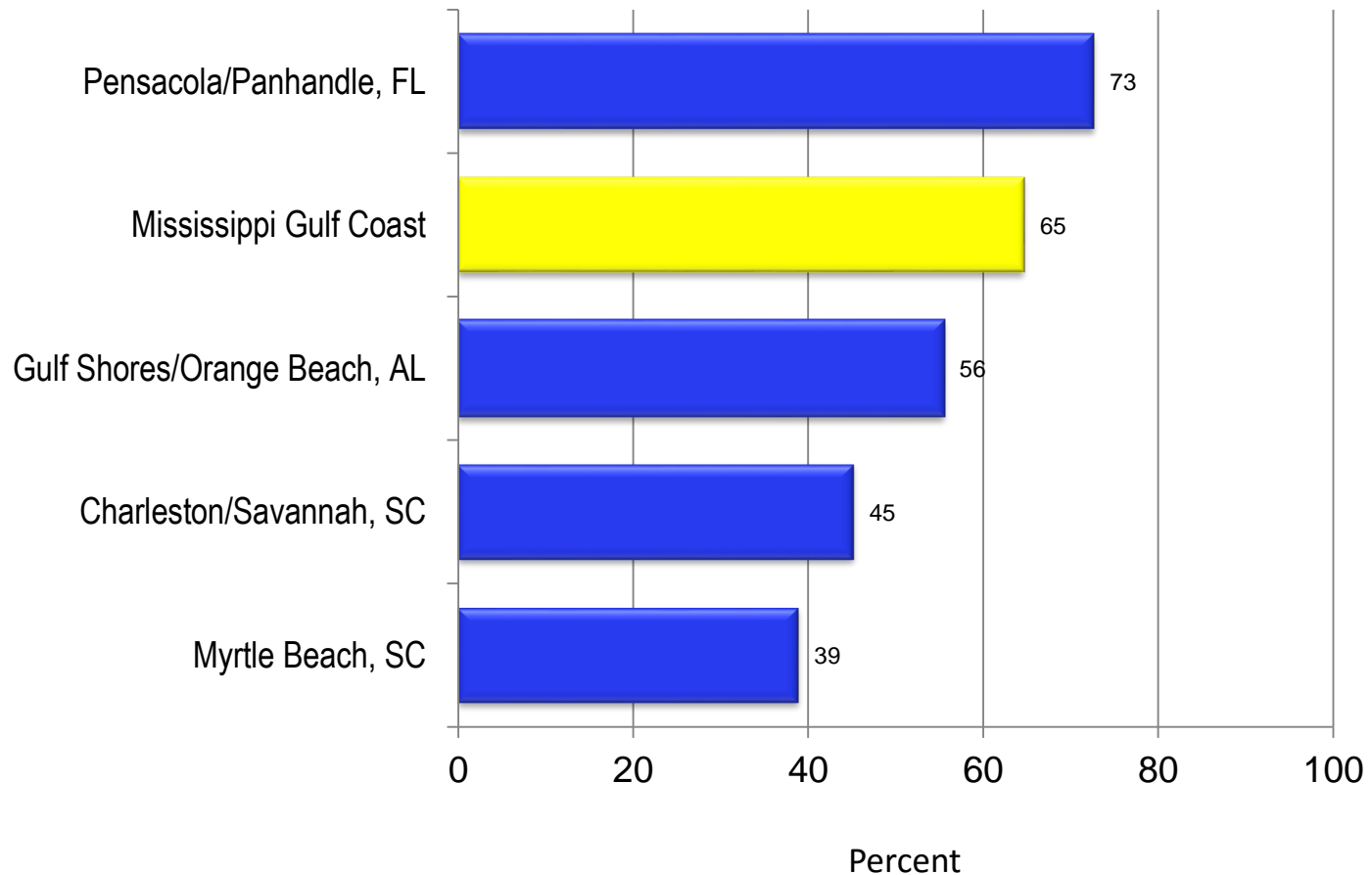
# Past 2 Years — Day/Overnight Trip

**Base: Total travelers who have ever visited**

| Location | Percent |
|---|---|
| Mississippi Gulf Coast | 52 |
| Gulf Shores/Orange Beach, AL | 50 |
| Pensacola/Panhandle, FL | 48 |
| Charleston/Savannah, SC | 39 |
| Myrtle Beach, SC | 37 |

Percent
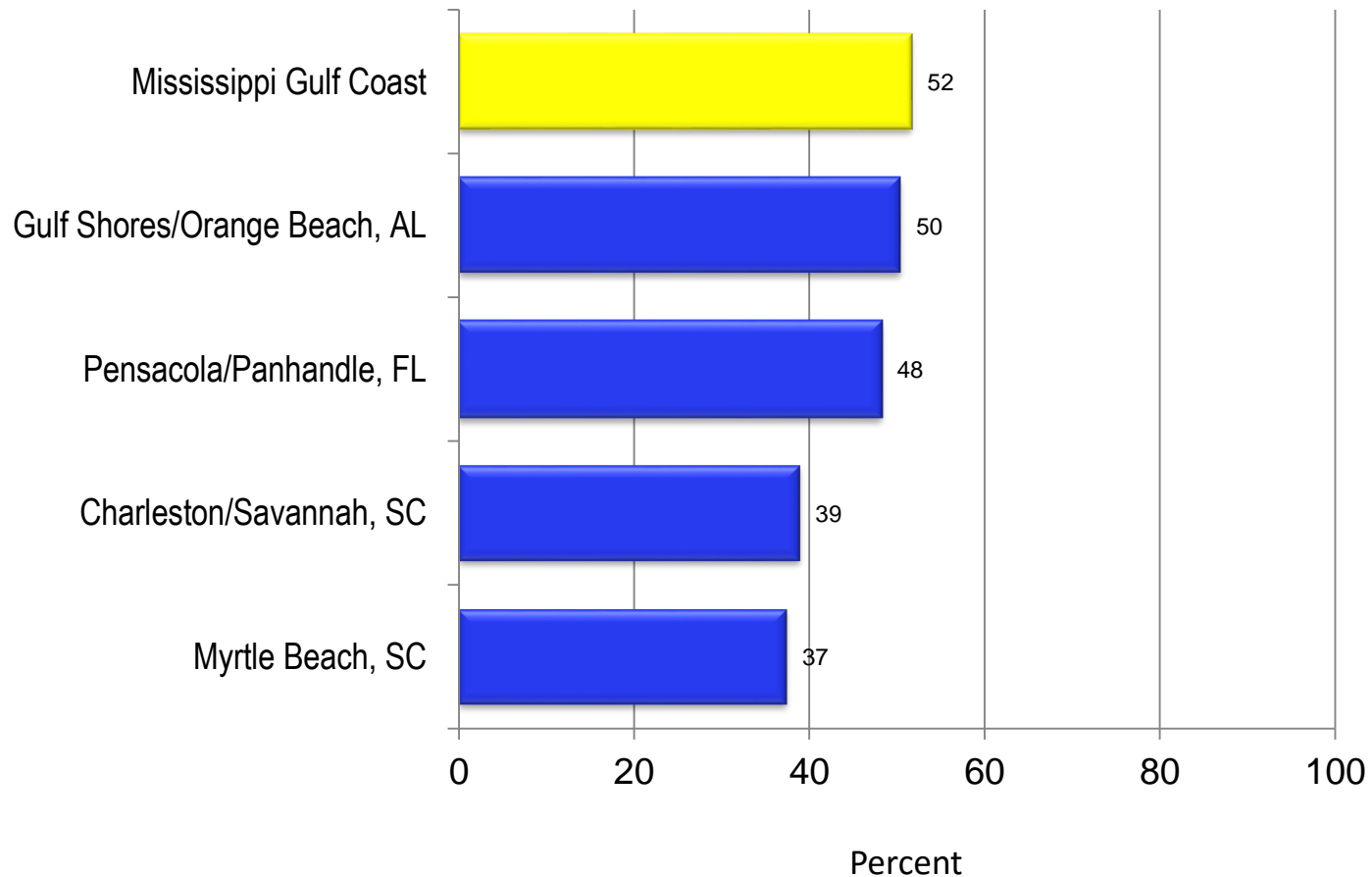
# Satisfaction with Most Recent Visit

**Base: Total travelers who visited the destination**



Charleston/Savannah, SC — 69
Gulf Shores/Orange Beach, AL — 67
Pensacola/Panhandle, FL — 66
Myrtle Beach, SC — 64
Mississippi Gulf Coast — 59

Percent who Very Satisfied

16
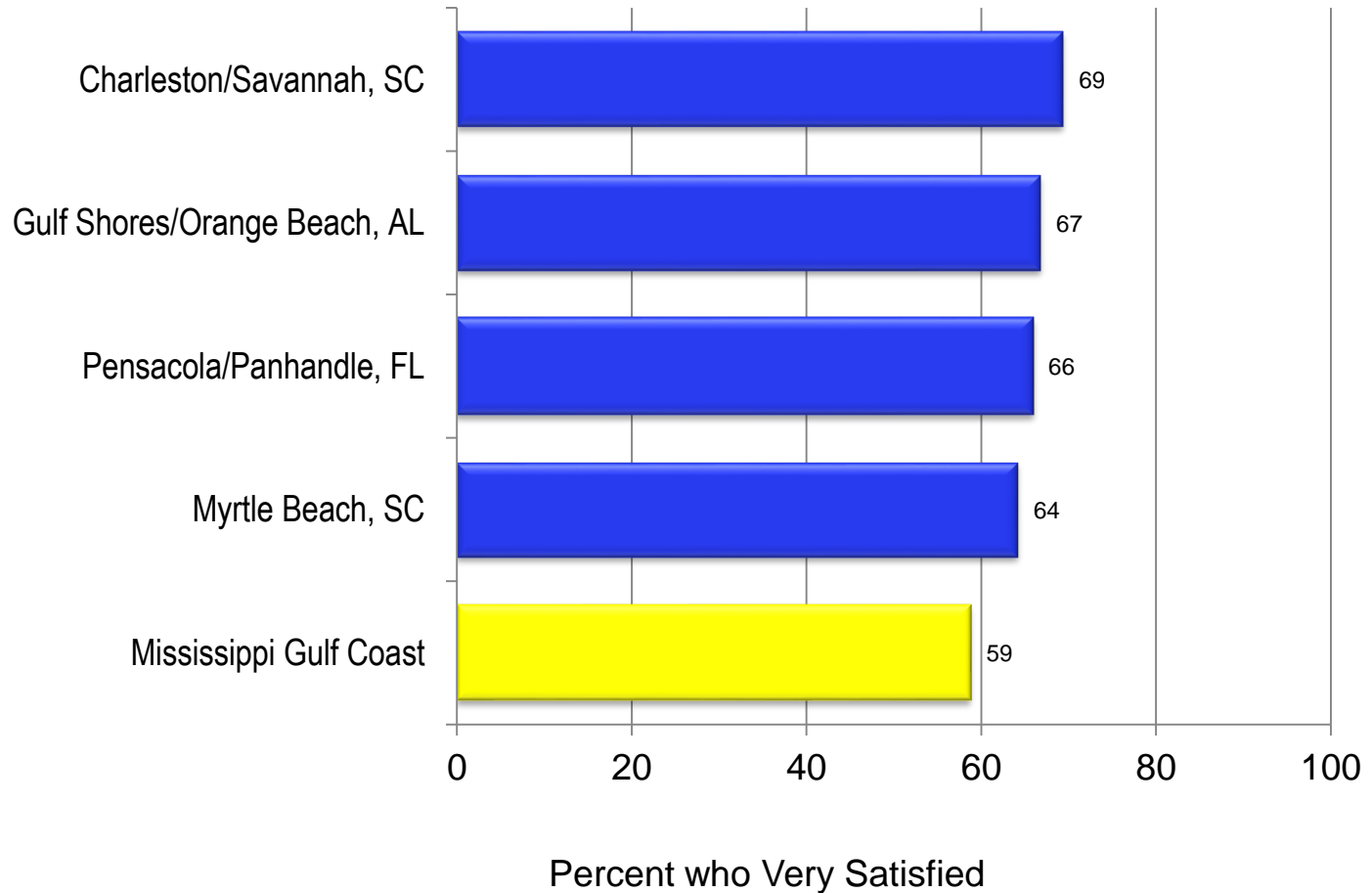
# Intent to Visit in the Next Year

**Base: Total travelers**



| Destination | Percent |
|---|---|
| Pensacola/Panhandle, FL | 46 |
| Gulf Shores/Orange Beach, AL | 43 |
| Mississippi Gulf Coast | 41 |
| Myrtle Beach, SC | 33 |
| Charleston/Savannah, SC | 32 |

Percent who Definitely/Probably Will Visit

17
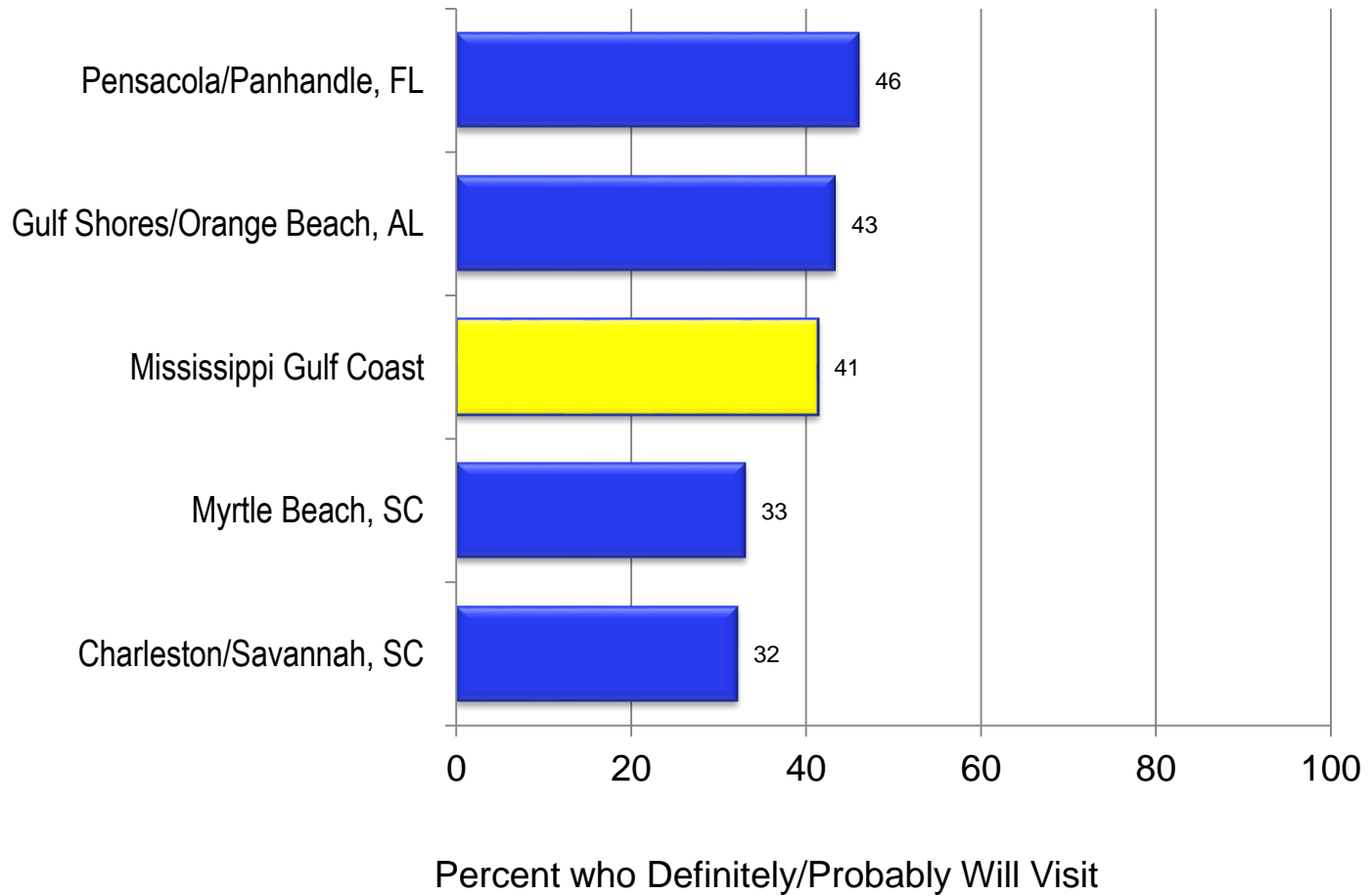
# Intent to Visit Mississippi Gulf Coast in the Next Year

**Base: Total travelers**
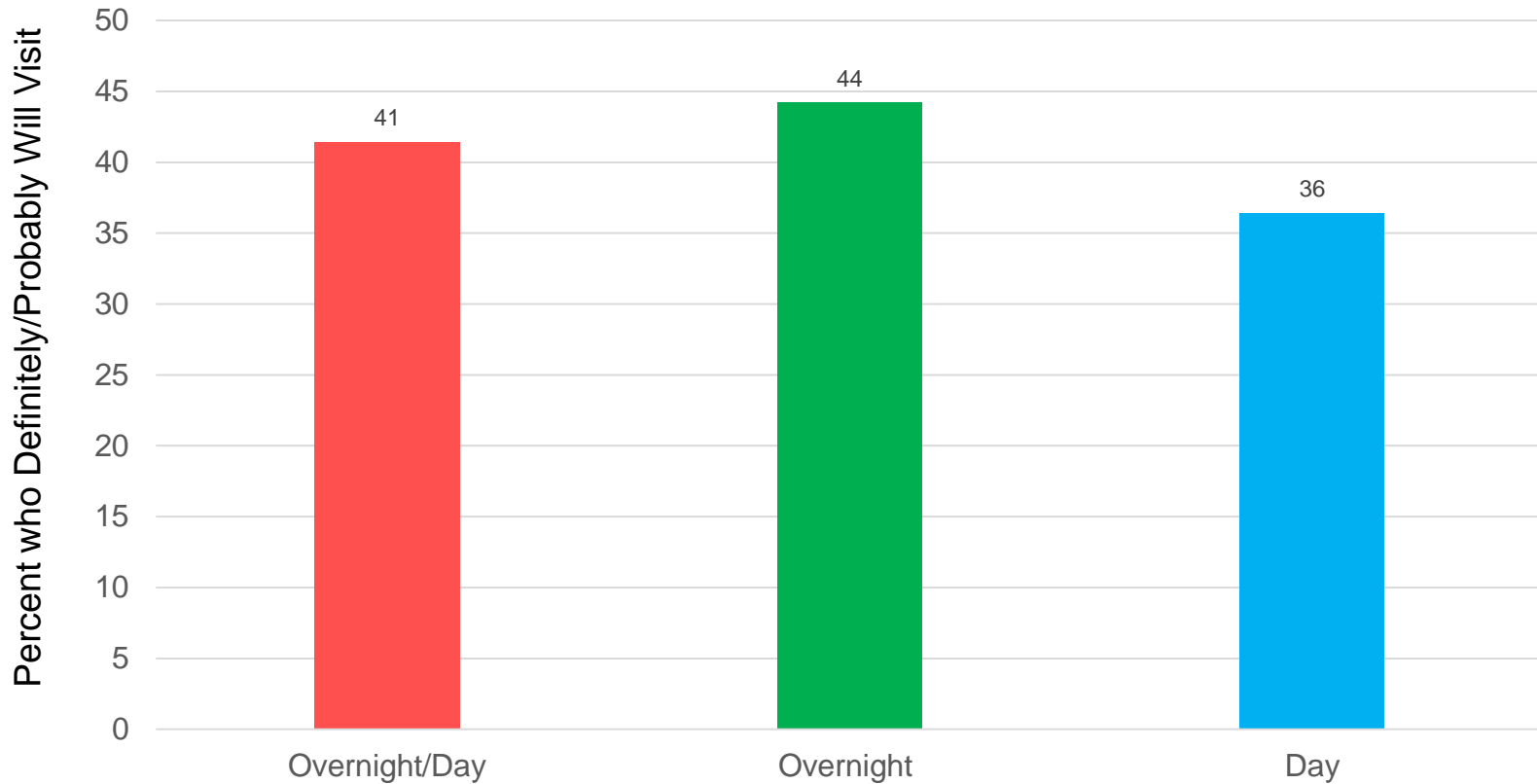
# Travel Motivators and Hot Buttons

# Travel Motivators

- **Longwoods** takes an innovative approach to profiling the factors that motivate travel and destination choice:
  - *direct questioning of respondents on this subject can often lead to misleading answers. Respondents' answers tend to favor rational over emotional ideas because they are easier to call to mind and articulate.*

- **Longwoods**, therefore, takes an indirect approach to uncovering these motivators:
  - *through predictive modeling analytics, we get below the surface and uncover the true factors that drive overall ratings of destination appeal and choice.*

# The Indirect Approach

- Respondents are asked to rate selected destinations across a robust list of destination **attributes** or characteristics.

- The statistical correlation between each attribute rating and the overall rating for being *"A place I would really enjoy visiting"* is then calculated.

  - *Individual attributes showing strong correlations are strong predictors of destination choice and those with the highest are the 'Hot Buttons' that should be included in the communications messaging .*

- Travel Motivator **factors** reflect the aggregated importance across related attributes.

# Travel Motivators and Hot Buttons

- Travel Motivator **factors** reflect the aggregated importance across related attributes.

- The most important **factors** that drive interest in a destination choice in the Mississippi Gulf Coast's advertised markets are:

  - *Is **exciting** – an exciting, fun, and must see place that provides some sense of real adventure.*

  - *Being a **great destination for adults***

  - Somewhat lower priorities are being seen as a destination that is luxurious - *elegant, sophisticated restaurants* and provides ***a family atmosphere*** and is ***worry-free*** *– feeling comfortable and welcomed*.

# Travel Motivators

| Motivator | Relative Importance* |
|---|---|
| Adult Destination | |
| Exciting | |
| Luxurious | |
| Family Atmosphere | |
| Worry Free | |
| Sightseeing | |
| Unique | |
| Entertainment | |
| Popular | |
| Climate | |
| Affordable | |
| Sports & Recreation | |

Relative Importance* ⟹
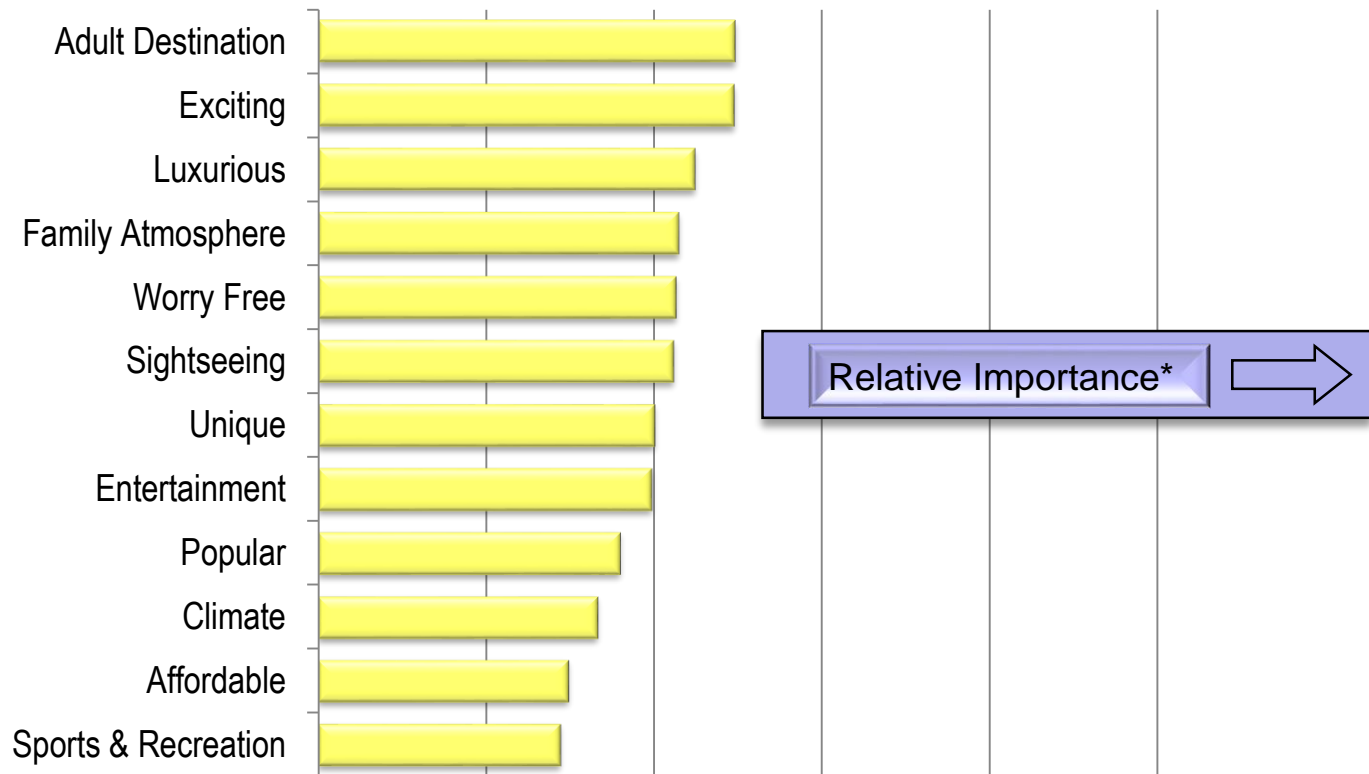
*A measure of the degree of association between each factor and  whether destination is a place "I would really enjoy visiting."

23

# Hot Buttons

| Top 10 Hot Buttons |
| :--- |
| A fun place |
| A place where I would feel comfortable |
| A place I would feel welcome |
| Lots of things to see and do |
| Good for couples |
| An exciting place |
| Good for an adult vacation |
| Good place for families to visit |
| Must see destination |
| Interesting communities |

# Mississippi Gulf Coast's Image

# Mississippi Gulf Coast's Image

- To obtain travelers' perceptions of the Mississippi Gulf Coast and its key competitors, respondents were asked to rate each city across a battery of attributes, using a ten-point scale where 10 meant 'Agree completely' and 1 meant 'Do not agree at all'.

  - *A 0 rating was allowed if they had no impression at all.*
  - *Image charts report the proportion of respondents who rated a destination at 10, 9, or an 8 on each attribute.*
  - *Competitive states were:* Gulf Shores/Orange Beach, AL, Pensacola/Panhandle, FL, Charleston/Savannah, SC, and Myrtle Beach, SC*.

# Mississippi Gulf Coast's Image – Cont'd

- The Mississippi Gulf Coast's image is rated higher for the *Affordable* factor versus the competitors' average.  The attributes that the Mississippi Gulf Coast has had advantage, most notably for:
  - *Affordable to get to*
  - *Affordable to eat there*
  - *Right distance for a weekend getaway*

- The Mississippi Gulf Coast is rated much lower on the *Popular* factor than the competitors' average.  For the remaining factors, the Mississippi Gulf Coast is rated lower.  Attributes that the Mississippi Gulf Coast is judged to be at a disadvantage are most notably:
  - *Well-known destination*
  - *Popular with vacationers*
  - *Beautiful gardens and parks*
  - *Great for golfers*
  - *Great for theater/arts/museums*
  - *Elegant, sophisticated restaurants*
  - *Truly beautiful scenery*

27

# Mississippi Gulf Coast's Image – Cont'd

- Compared to Gulf Shores/Orange Beach, the Mississippi Gulf Coast's image is stronger for :
  - *Well-known landmarks*
  - *Affordable accommodations*

- Compared to Gulf Shores/Orange Beach, the Mississippi Gulf Coast's image is weaker for :
  - *Popular with vacationers*
  - *Children would especially enjoy*
  - *Truly beautiful scenery*
  - *Beautiful garden parks*
  - *Well-known destination*
  - *Great for motorcycle touring*
  - *A fun place*
  - *Unique vacation experience*

# Mississippi Gulf Coast's Image – Cont'd

- ⊙ Compared to Pensacola/Panhandle, FL, the Mississippi Gulf Coast's image is stronger for :
  - ⊙ *Affordable to eat there*

- ⊙ Compared to Pensacola/Panhandle, FL, the Mississippi Gulf Coast's image is notably weaker for :
  - ⊙ *Well-known destination*
  - ⊙ *Popular with vacationers*
  - ⊙ *Children would especially enjoy*
  - ⊙ *Excellent climate overall*
  - ⊙ *A fun place*
  - ⊙ *Great for golfers*
  - ⊙ *Great for theater/arts/museums*
  - ⊙ *A real adventure*
  - ⊙ *An exciting place*

# Mississippi Gulf Coast's Image – Cont'd

- Compared to Charleston/Savannah, the Mississippi Gulf Coast's image is stronger for :

  - *Affordable to eat there*
  - *Excellent fishing*
  - *Right distance for a weekend getaway*
  - *Affordable to get to*
  - *Not too far away to consider for a vacation*

# Mississippi Gulf Coast's Image – Cont'd

- Compared to Charleston/Savannah, the Mississippi Gulf Coast's image is notably weaker for :
    - *Noted for its history*
    - *Elegant, sophisticated restaurants*
    - *Beautiful gardens and parks*
    - *Well-known landmarks*
    - *Well-known destination*
    - *Great for theater/arts/museums*
    - *Interesting communities*
    - *Truly beautiful scenery*
    - *Lots of things to see and do*
    - *First-class hotels/resorts*
    - *Unique vacation experience*
    - *Excellent shopping*
    - *Must see destination*
    - *Unique scenery*
    - *Popular with vacationers*

# Mississippi Gulf Coast's Image – Cont'd

⦿ Compared to Myrtle Beach, the Mississippi Gulf Coast's image is stronger for:

- ⦿ *Affordable to get to*
- ⦿ *Just the right distance for a getaway*
- ⦿ *Not too far away for a vacation/getaway*
- ⦿ *Affordable to eat there*

# Mississippi Gulf Coast's Image – Cont'd

- Compared to Myrtle Beach, the Mississippi Gulf Coast's image is notably weaker for :
  - *Well-known destination*
  - *Popular with vacationers*
  - *Great for golfers*
  - *Elegant, sophisticated restaurants*
  - *Beautiful gardens and parks*
  - *Must see destination*
  - *Good place for families to visit*
  - *Children would especially enjoy*
  - *An exciting place*
  - *Great for theater/arts/museums*
  - *Lots of things to see and do*
  - *Unique vacation experience*
  - *Truly beautiful scenery*
  - *Excellent shopping*

# Mississippi Gulf Coast's Image – Cont'd

- When comparing the Mississippi Gulf Coast's image – Inner Markets vs. Outer Markets, the Inner Markets are much stronger on the factors of:
  - *Adult Destination*
  - *Family Atmosphere*
  - *Affordable*

- Examining specific attributes, five Hot Buttons are stronger for the Inner Markets:
  - *Good place for families to visit*
  - *Good for an adult vacation*
  - *A place I would feel welcome*
  - *Interesting communities*
  - *Good for couples*
  - *Popular with vacationers*

- Further detail can be found on pages 35-78.

34

# Mississippi Gulf Coast Image's Strengths vs. Competitors

Base: Total Travelers



Difference in Percent Who Strongly Agree

# Mississippi Gulf Coast Image's Weaknesses vs. Competitors

| Attribute | Difference |
|---|---|
| Well-known destination | -15 |
| Popular with vacationers | -13 |
| Beautiful gardens and parks | -10 |
| Great for golfers | -9 |
| Great for theater/arts/museums | -9 |
| Elegant, sophisticated restaurants | -9 |
| Truly beautiful scenery | -9 |
| A fun place | -8 |
| Must see destination | -8 |
| First-class hotels/resorts | -8 |
| Unique vacation experience | -7 |
| Children would especially enjoy | -7 |

Difference in Percent Who Strongly Agree

Note: Circled attributes are some of the most important image hot buttons for travelers

# Mississippi Gulf Coast Image's Weaknesses vs. Competitors

Base: Total Travelers

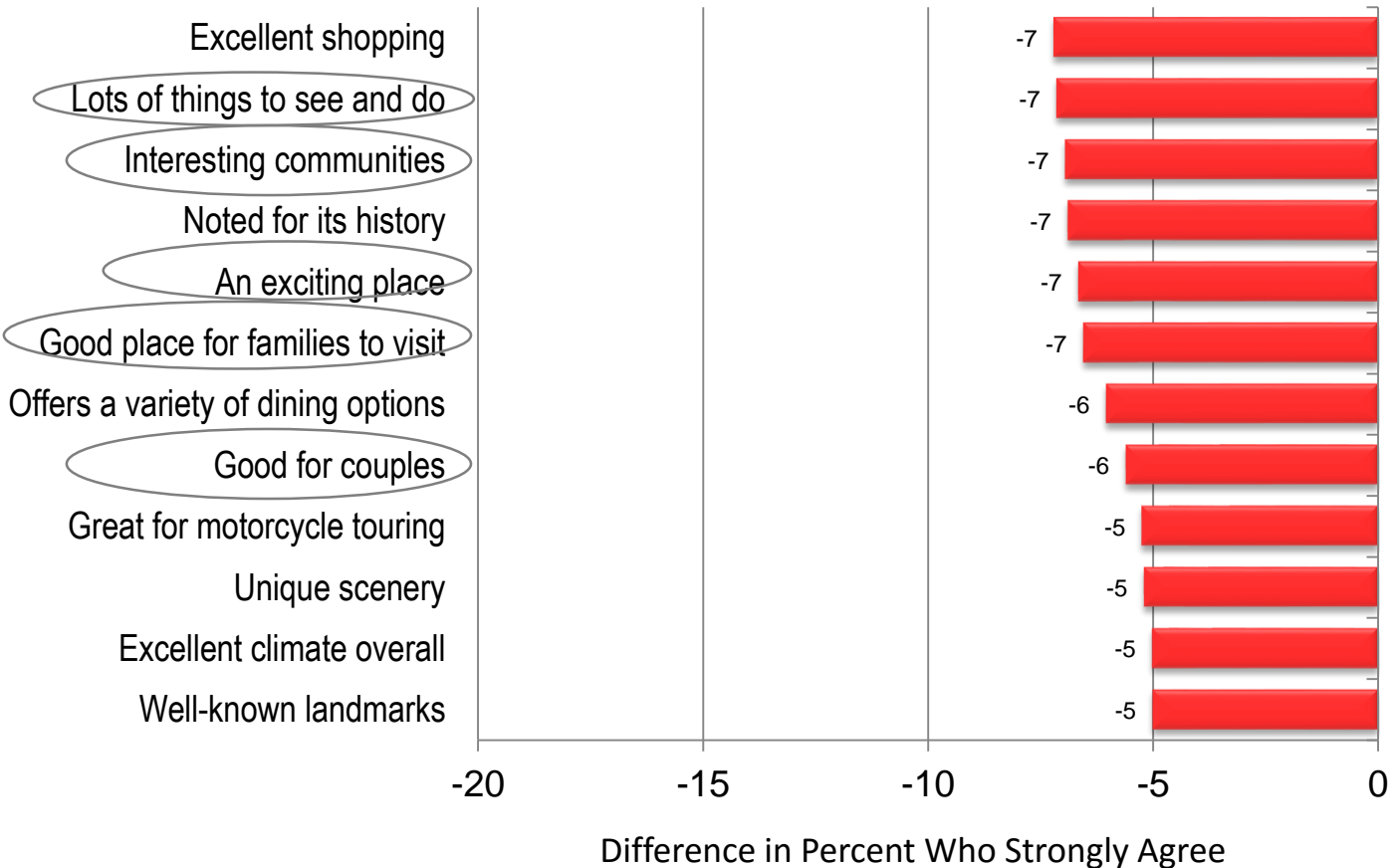| Attribute | Difference |
|---|---|
| Excellent shopping | -7 |
| Lots of things to see and do | -7 |
| Interesting communities | -7 |
| Noted for its history | -7 |
| An exciting place | -7 |
| Good place for families to visit | -7 |
| Offers a variety of dining options | -6 |
| Good for couples | -6 |
| Great for motorcycle touring | -5 |
| Unique scenery | -5 |
| Excellent climate overall | -5 |
| Well-known landmarks | -5 |

Difference in Percent Who Strongly Agree

Note: Circled attributes are some of the most important image hot buttons for travelers

37

# Mississippi Gulf Coast's Image vs. Competitors*

Base: Total Travelers

**Relative Importance***

| Attribute | MS Gulf Coast | Competitors* |
|---|---|---|
| Exciting | 47 | 54 |
| Adult Destination | 58 | 62 |
| Luxurious | 44 | 52 |
| Family Atmosphere | 50 | 57 |
| Worry Free | 53 | 55 |
| Sightseeing | 46 | 53 |
| Unique | 44 | 50 |
| Entertainment | 41 | 45 |
| Popular | 46 | 56 |
| Affordable | 53 | 48 |
| Climate | 42 | 46 |
| Sports & Recreation | 43 | 46 |

Percent Who Strongly Agree

■ MS Gulf Coast   ■ Competitors*

- **Competitors**: Gulf shore/Orange Beach, AL, Pensacola/Panhandle, FL, Charleston/Savannah, SC, Myrtle Beach, SC

38

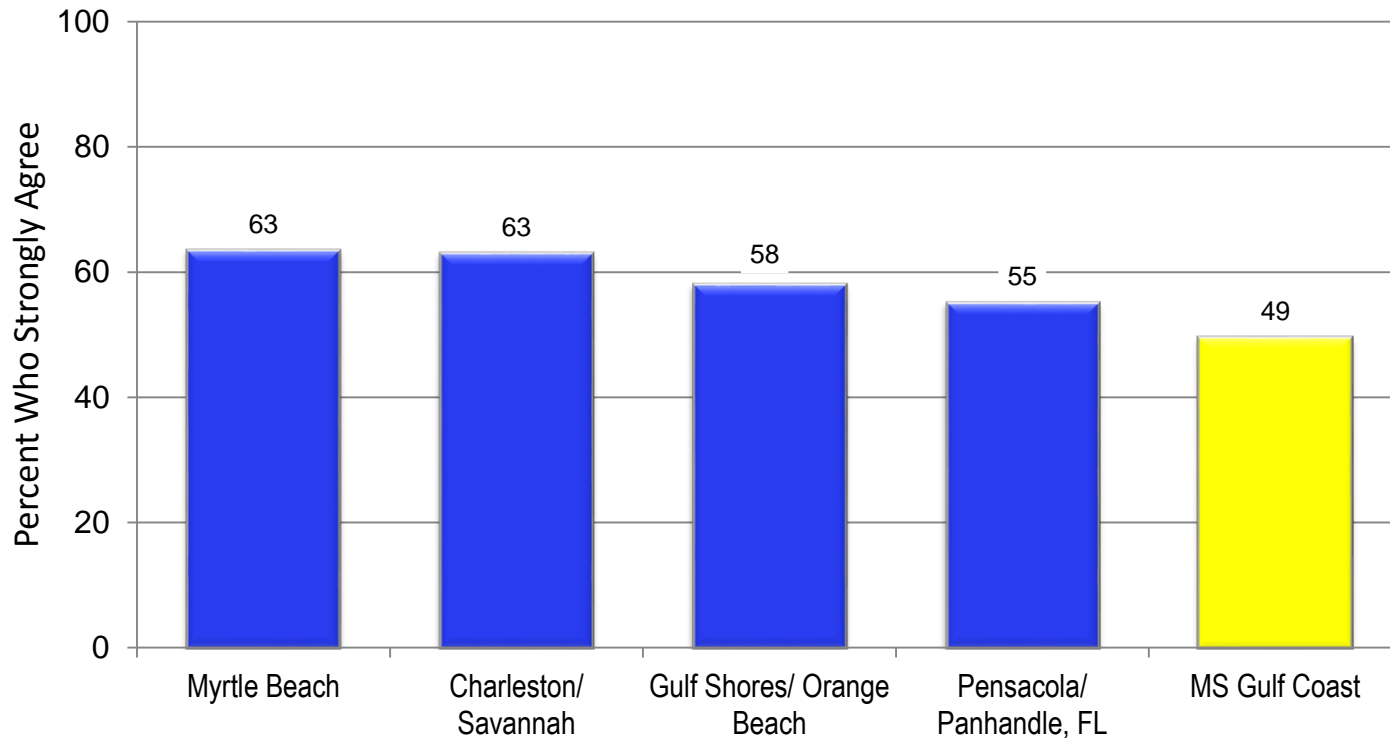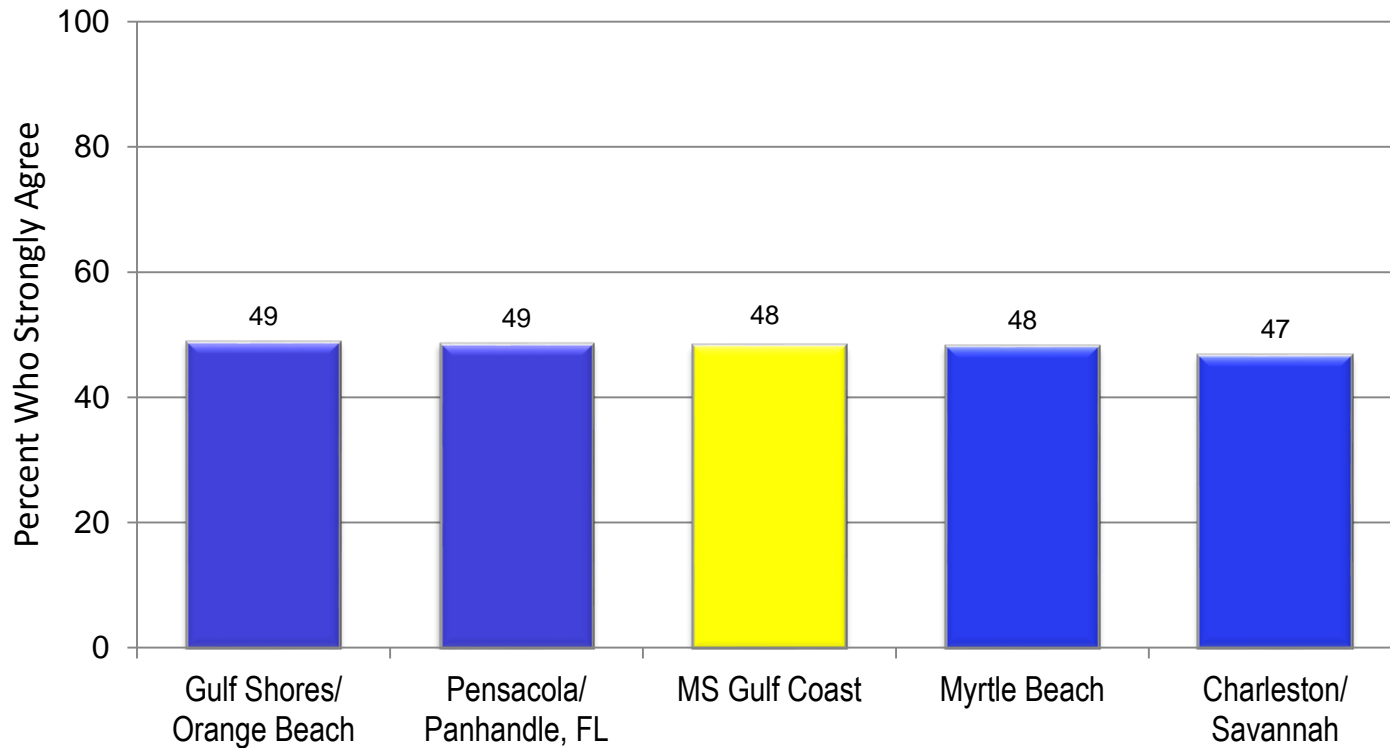# Overall Image:
# "Would Really Enjoy Visiting"

Base: Total Travelers

# Overall Image:
# "Excellent Vacation Value for the Money"

Base: Total Travelers

# Mississippi Gulf Coast's
# Image vs. Competitors — Exciting

Base: Total Travelers

# Mississippi Gulf Coast's
# Image vs. Competitors — Exciting

Base: Total Travelers

**Exciting**
- MS Gulf Coast: 47
- Competitors: 54

**A fun place** (circled)
- MS Gulf Coast: 51
- Competitors: 59

**An exciting place** (circled)
- MS Gulf Coast: 43
- Competitors: 50

**Must see destination** (circled)
- MS Gulf Coast: 51
- Competitors: 59

**A real adventure**
- MS Gulf Coast: 42
- Competitors: 46

Percent Who Strongly Agree

■ MS Gulf Coast  ■ Competitors

42

Note: Circled attributes are some of the most important image hot buttons for travelers

# Mississippi Gulf Coast's
# Image vs. Competitors — Adult Destination

Base: Total Travelers



Percent Who Strongly Agree

| Destination | Value |
|---|---|
| Myrtle Beach | 65 |
| Pensacola/ Panhandle, FL | 64 |
| Charleston/ Savannah | 63 |
| Gulf Shores/ Orange Beach | 58 |
| MS Gulf Coast | 58 |

# Mississippi Gulf Coast's
# Image vs. Competitors — Adult Destination

Base: Total Travelers

**Adult Destination**
- 58 (MS Gulf Coast)
- 62 (Competitors)

**Good for couples**
- 56 (MS Gulf Coast)
- 61 (Competitors)

**Good for an adult vacation**
- 59 (MS Gulf Coast)
- 63 (Competitors)

Percent Who Strongly Agree

□ MS Gulf Coast  ■ Competitors

44

Note: Circled attributes are some of the most important image hot buttons for travelers

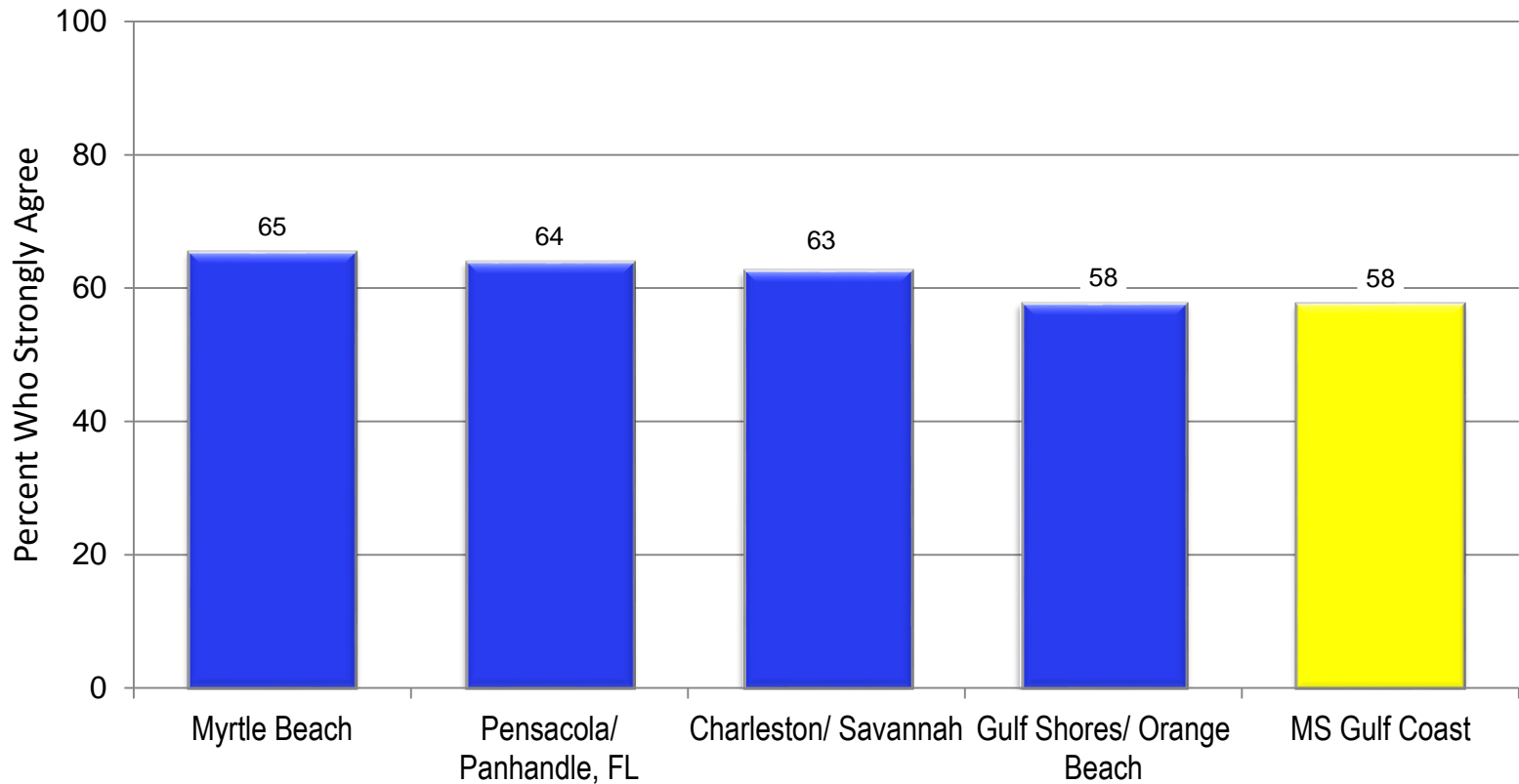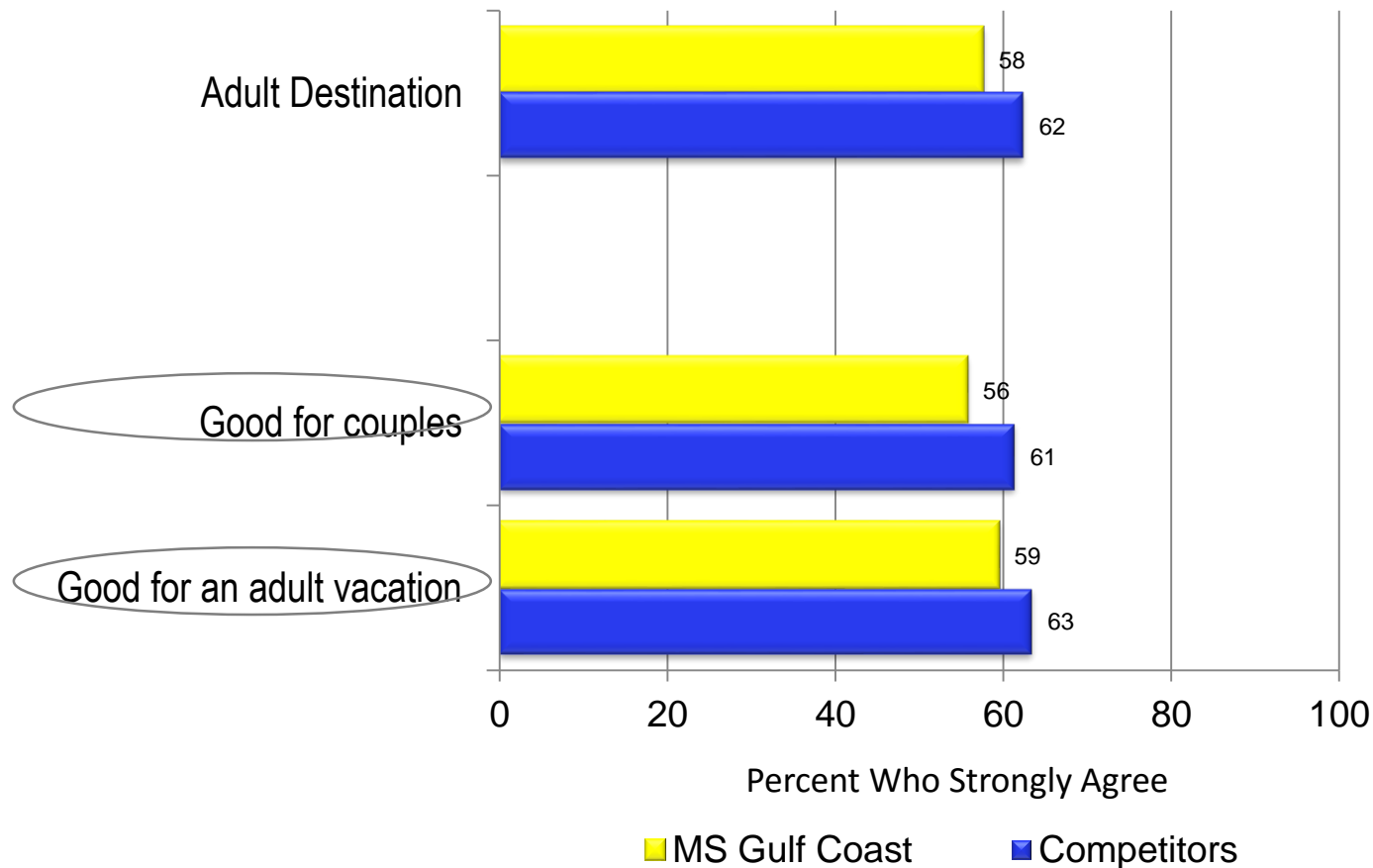# Mississippi Gulf Coast's
# Image vs. Competitors — Luxurious

Base: Total Travelers

# Mississippi Gulf Coast's
# Image vs. Competitors — Luxurious

Base: Total Travelers



**Percent Who Strongly Agree**

| Category | MS Gulf Coast | Competitors |
|---|---|---|
| Luxurious | 44 | 52 |
| Elegant, sophisticated restaurants | 39 | 48 |
| First-class hotels/resorts | 49 | 57 |

■ MS Gulf Coast   ■ Competitors

# Mississippi Gulf Coast's Image vs. Competitors — Family Atmosphere

Base: Total Travelers



47

# Mississippi Gulf Coast's Image vs. Competitors — Family Atmosphere

**Family Atmosphere**
- MS Gulf Coast: 50
- Competitors: 57

**Good place for families to visit**
- MS Gulf Coast: 54
- Competitors: 61

**Children would especially enjoy**
- MS Gulf Coast: 46
- Competitors: 54

Percent Who Strongly Agree

◻ MS Gulf Coast    ◻ Competitors

48
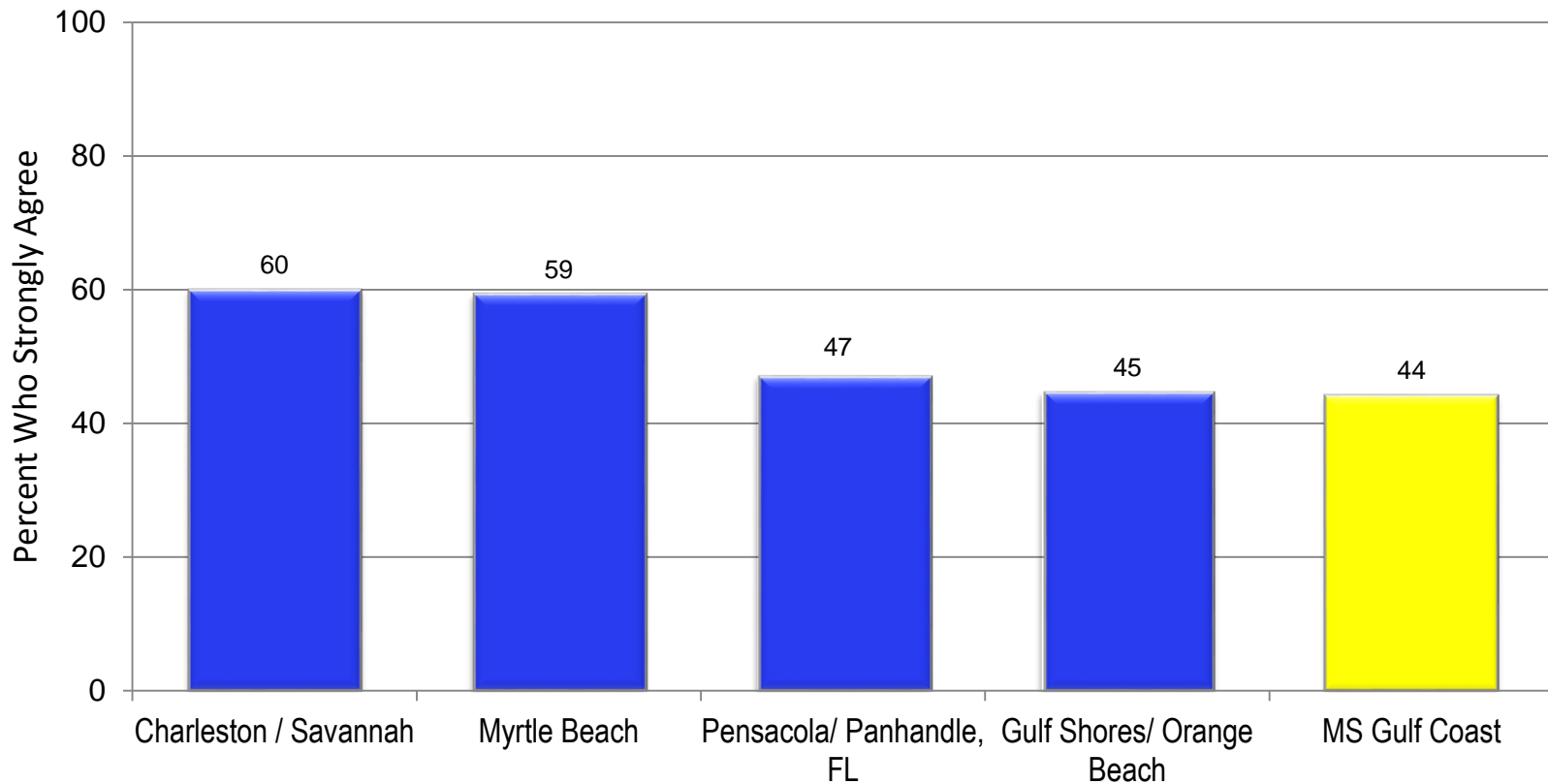
Note: Circled attributes are some of the most important image hot buttons for travelers
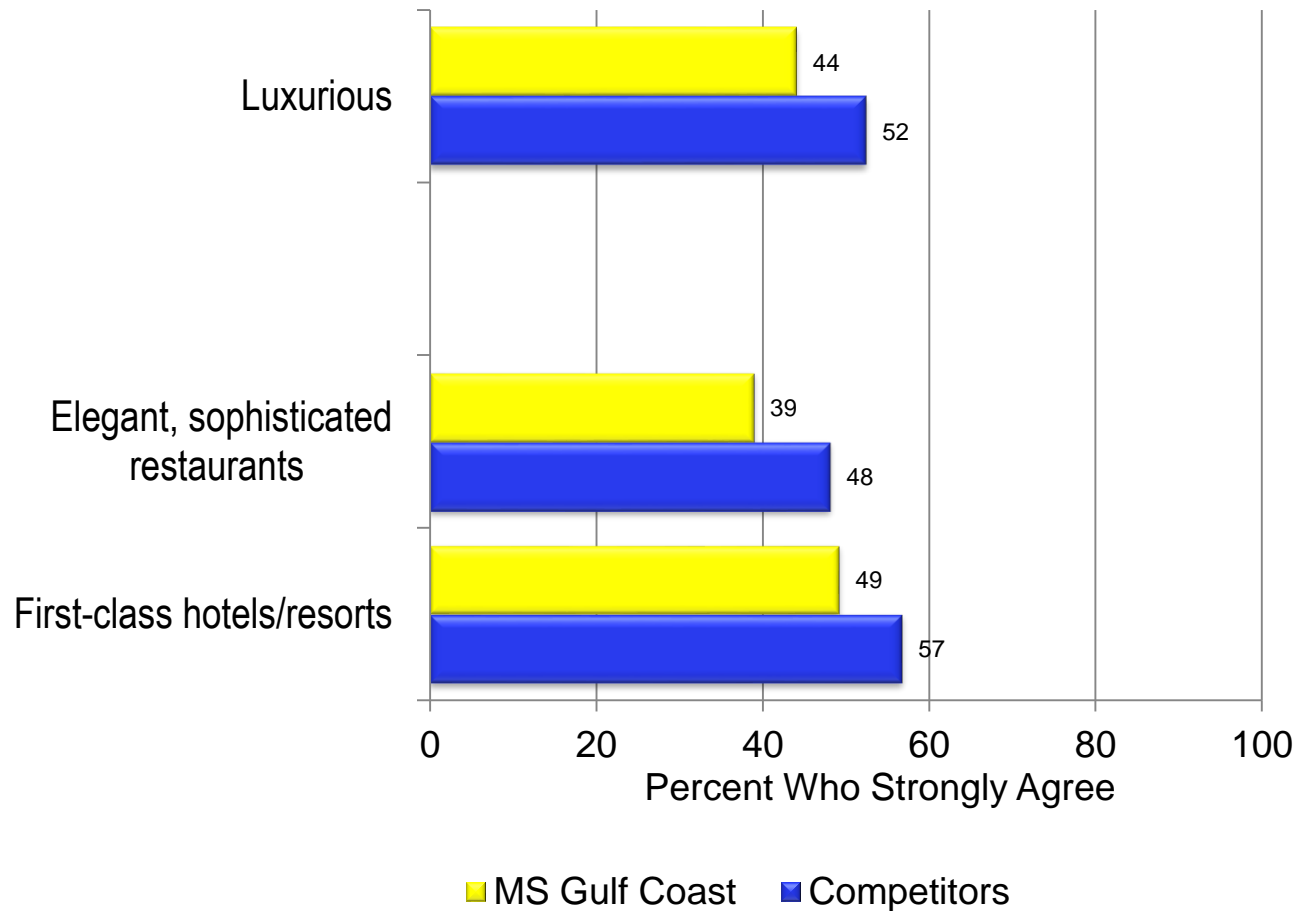
# Mississippi Gulf Coast's
# Image vs. Competitors — Worry Free

Base: Total Travelers

# Mississippi Gulf Coast's
# Image vs. Competitors — Worry Free

Base: Total Travelers



| Attribute | MS Gulf Coast | Competitors |
|---|---|---|
| Worry Free | 53 | 55 |
| A place where I would feel comfortable | 55 | 58 |
| A place I would feel welcome | 54 | 55 |
| Good place to relax | 55 | 60 |
| Warm, friendly people | 56 | 57 |
| Offers a variety of dining options | 51 | 57 |
| Safe place to travel | 56 | 58 |
| Right distance for a weekend getaway | 48 | 43 |

Percent Who Strongly Agree

🟨 MS Gulf Coast  🟦 Competitors

50

Note: Circled attributes are some of the most important image hot buttons for travelers

# Mississippi Gulf Coast's
# Image vs. Competitors — Sightseeing

Base: Total Travelers
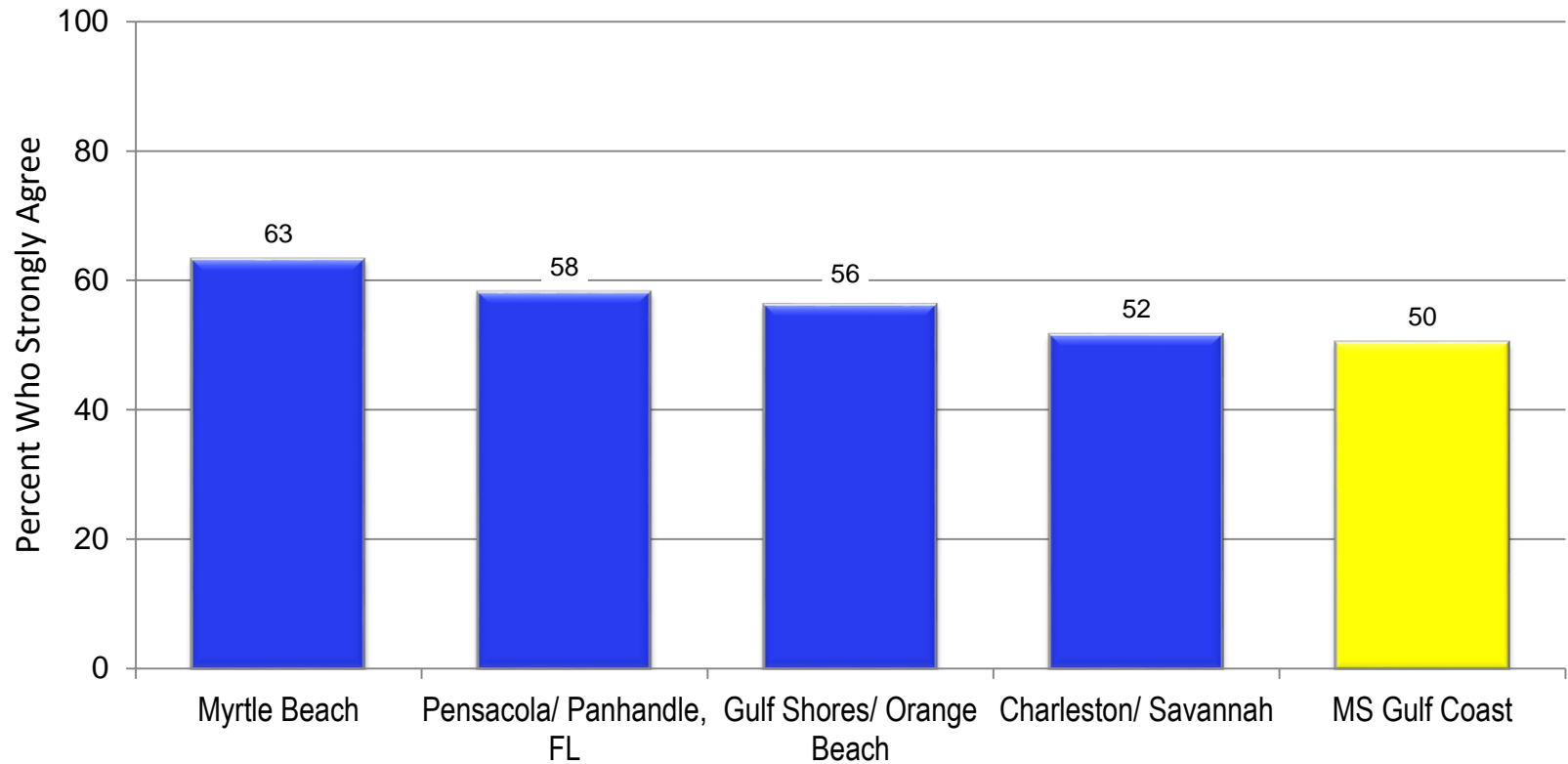
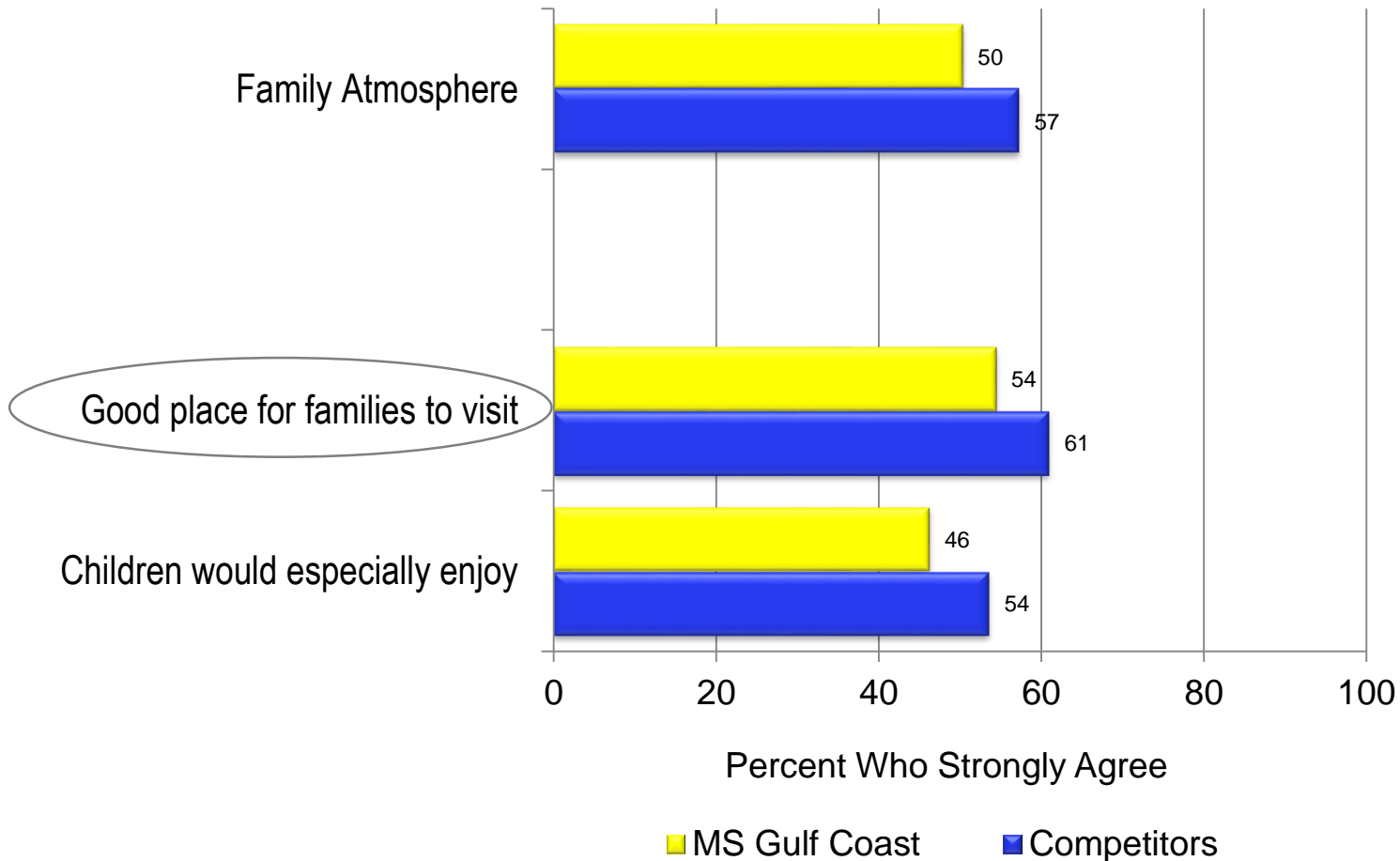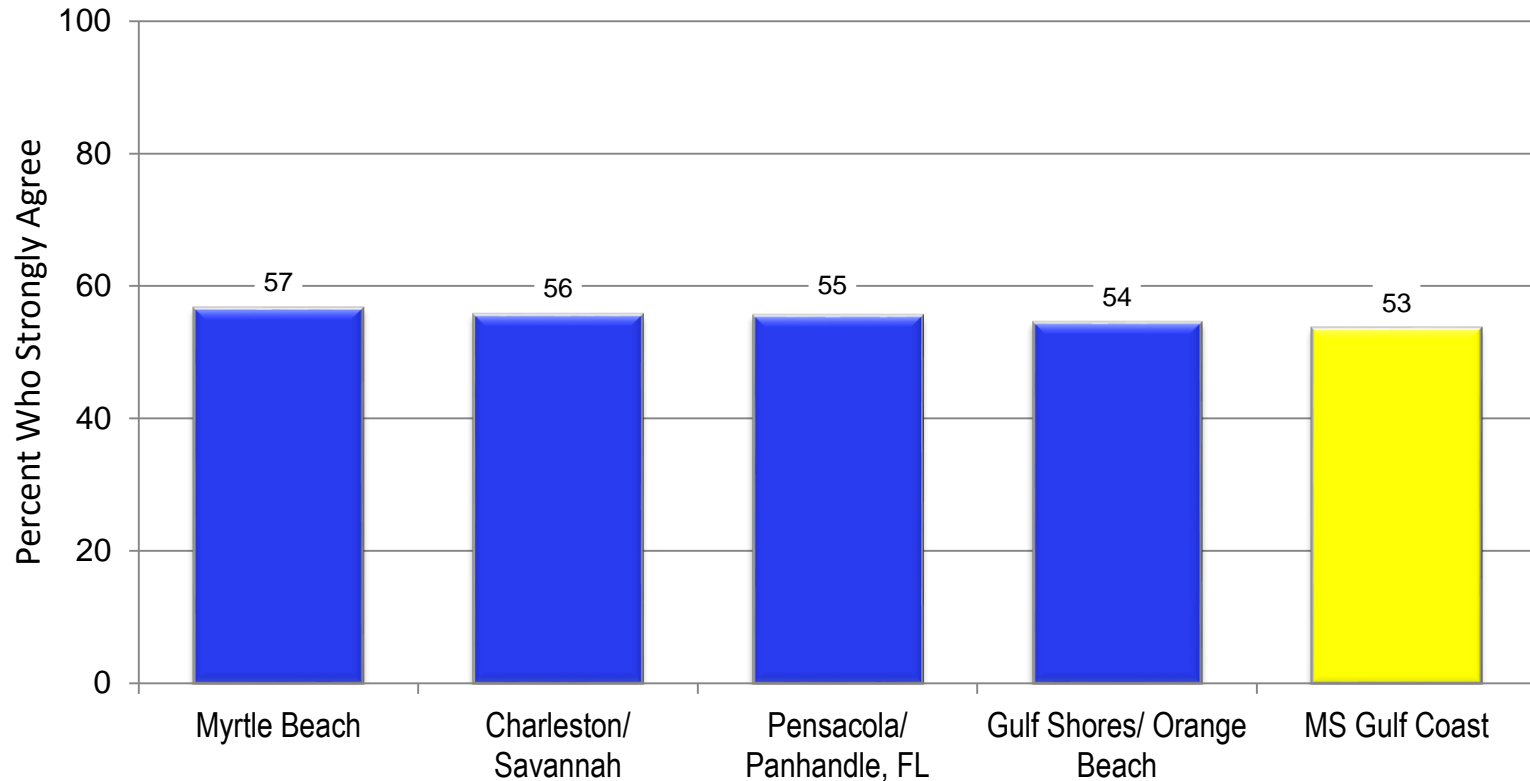# Mississippi Gulf Coast's
# Image vs. Competitors — Sightseeing

Base: Total Travelers



Percent Who Strongly Agree

■ MS Gulf Coast    ■ Competitors

52

# Mississippi Gulf Coast's
# Image vs. Competitors — Unique

Bar chart — Percent Who Strongly Agree:
- Charleston/ Savannah: 53
- Myrtle Beach: 53
- Gulf Shores/ Orange Beach: 47
- Pensacola/ Panhandle, FL: 46
- MS Gulf Coast: 44

# Mississippi Gulf Coast's Image vs. Competitors — Unique

Base: Total Travelers



Percent Who Strongly Agree

■ MS Gulf Coast   ■ Competitors
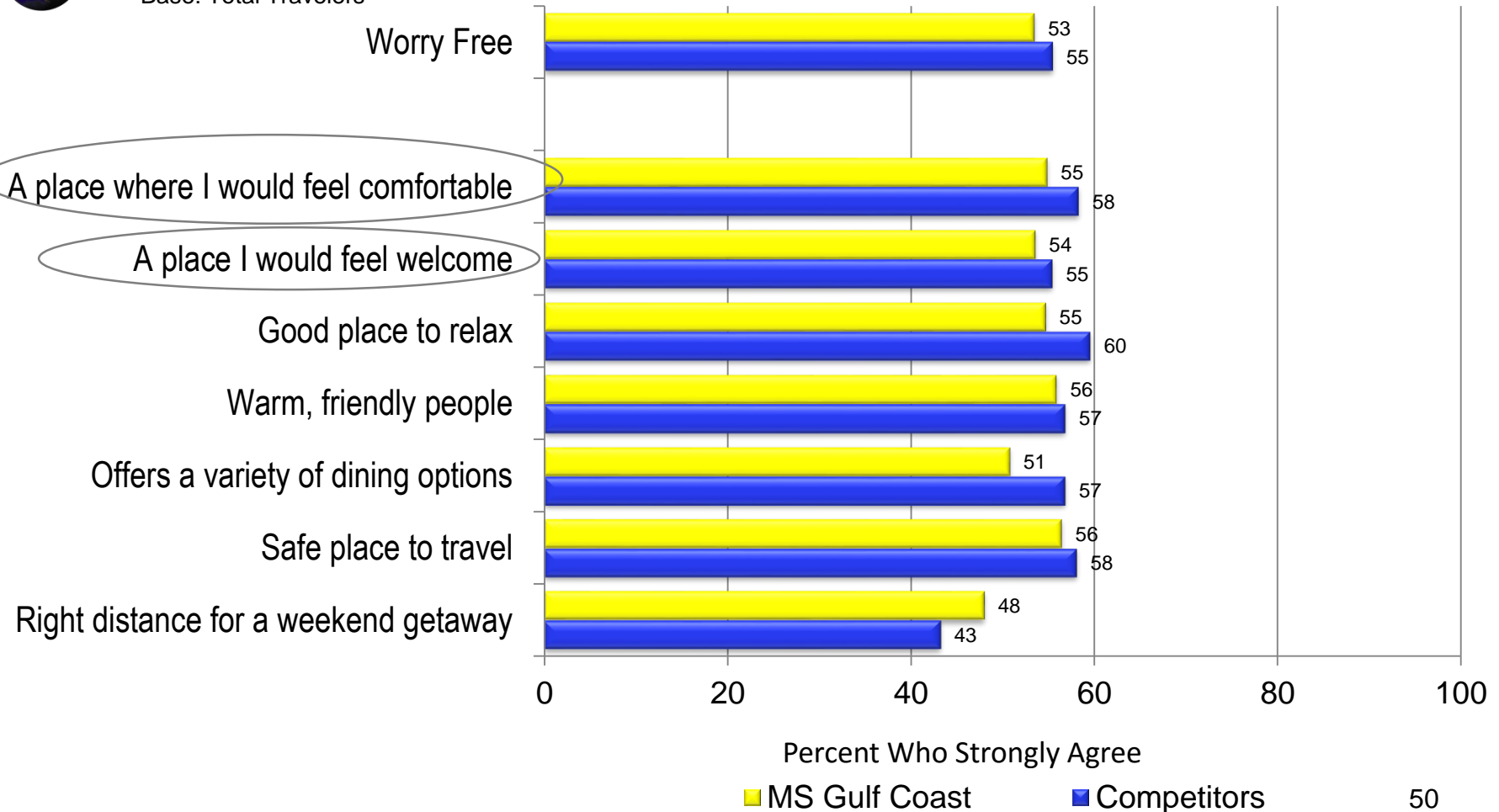
# Mississippi Gulf Coast's
# Image vs. Competitors — Entertainment

Base: Total Travelers

# Mississippi Gulf Coast's
# Image vs. Competitors — Entertainment

Base: Total Travelers

Percent Who Strongly Agree

| Category | MS Gulf Coast | Competitors |
|---|---|---|
| Entertainment | 41 | 45 |
| Interesting festivals/fairs/events | 44 | 47 |
| Excellent shopping | 39 | 47 |
| Exciting nightlife/entertainment/shows | 45 | 49 |
| Great live music | 44 | 44 |
| Great for theater/arts/museums | 30 | 40 |

# Mississippi Gulf Coast's
# Image vs. Competitors — Popular

Base: Total Travelers
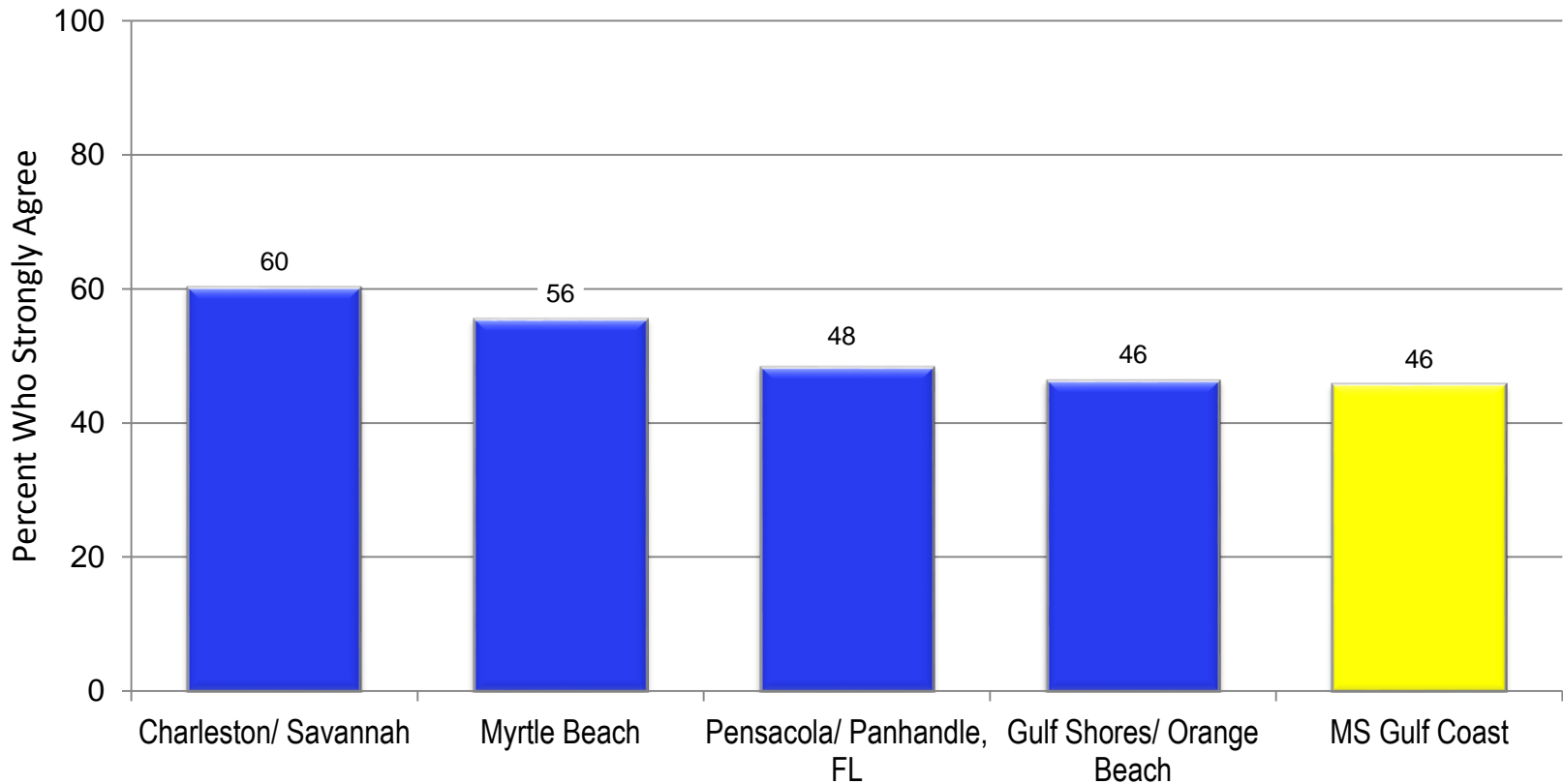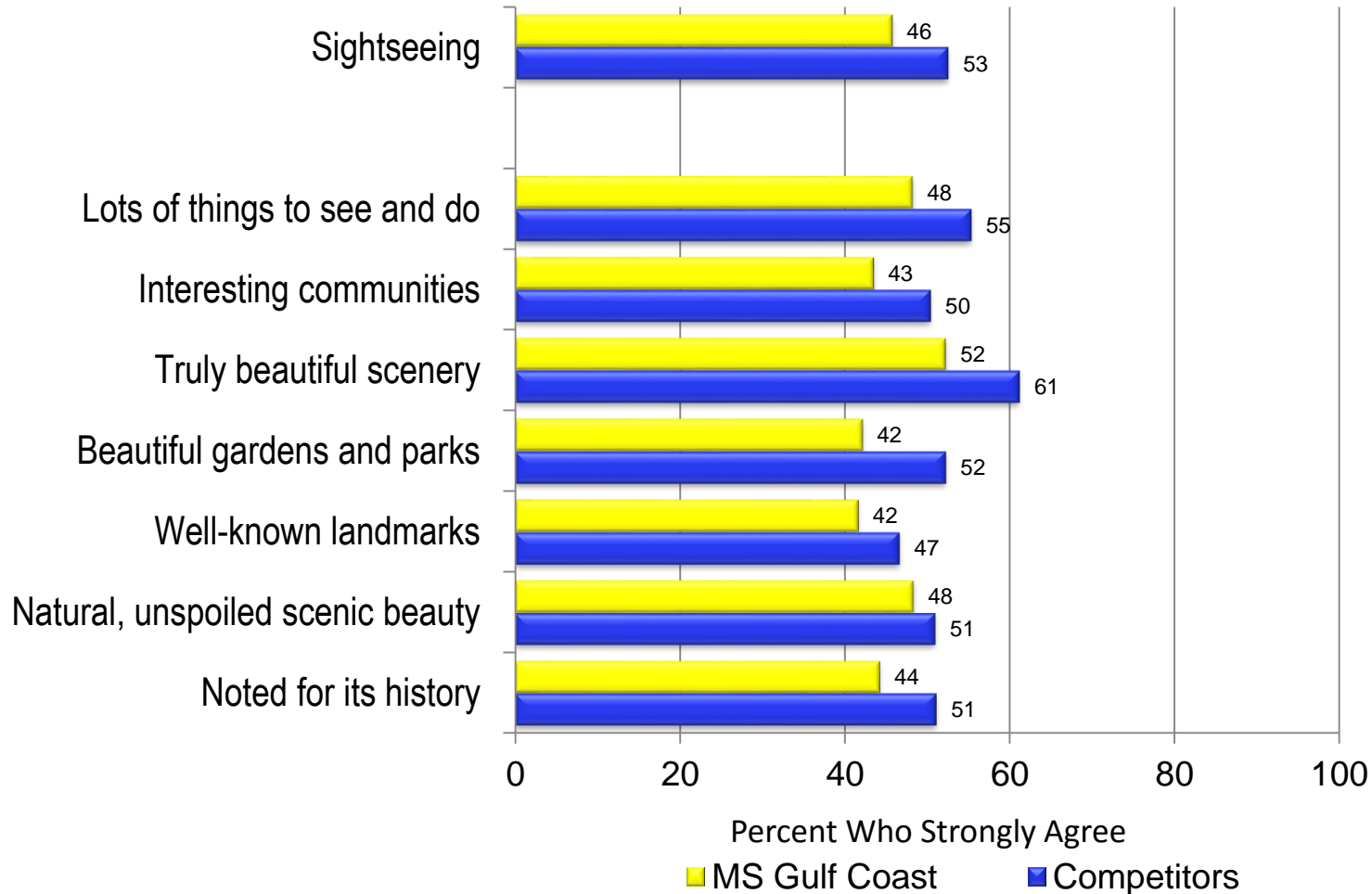
# Mississippi Gulf Coast's
# Image vs. Competitors — Popular

Base: Total Travelers



Percent Who Strongly Agree

■ MS Gulf Coast    ■ Competitors
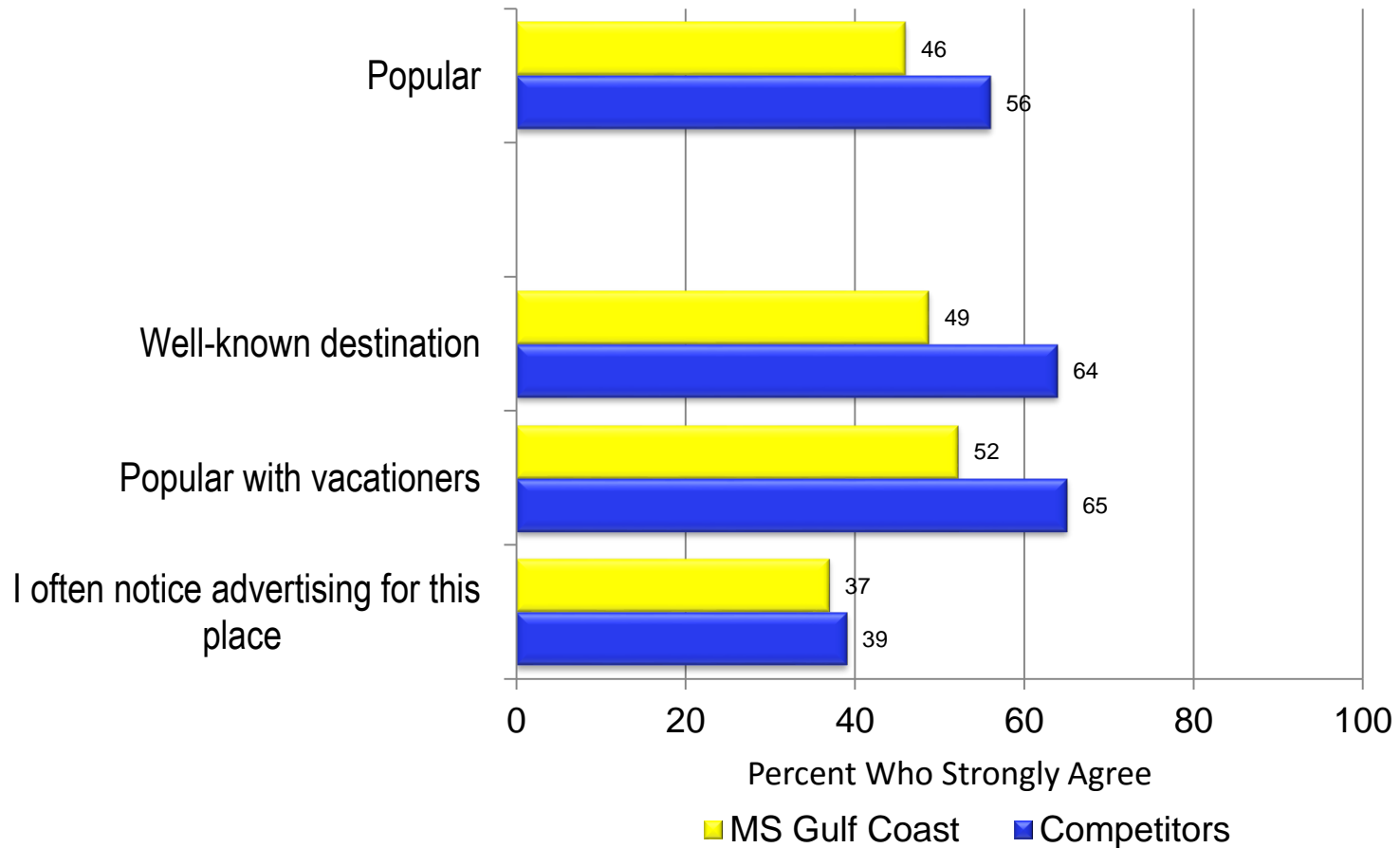
# Mississippi Gulf Coast's
# Image vs. Competitors — Climate

Base: Total Travelers
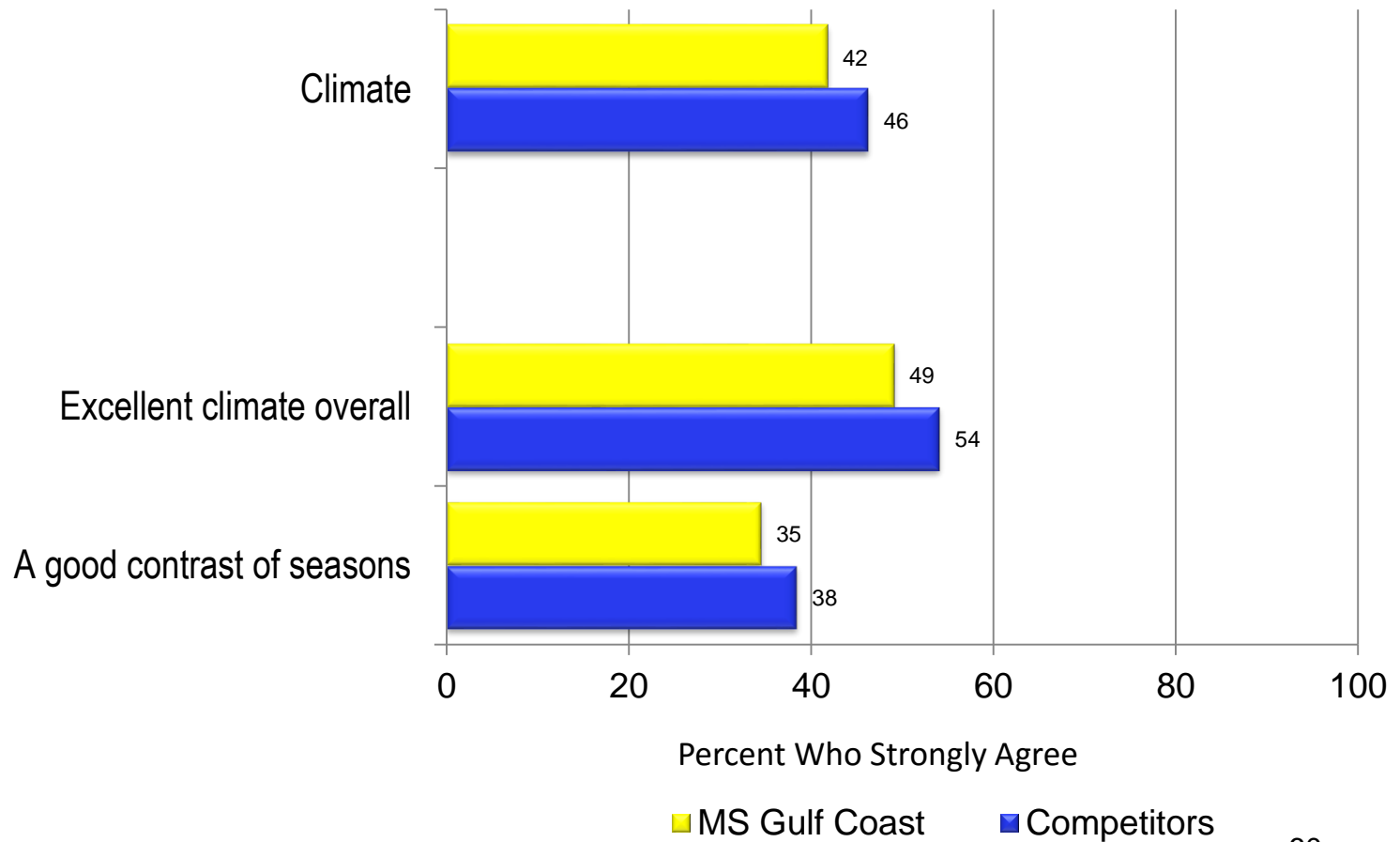


Chart: Percent Who Strongly Agree

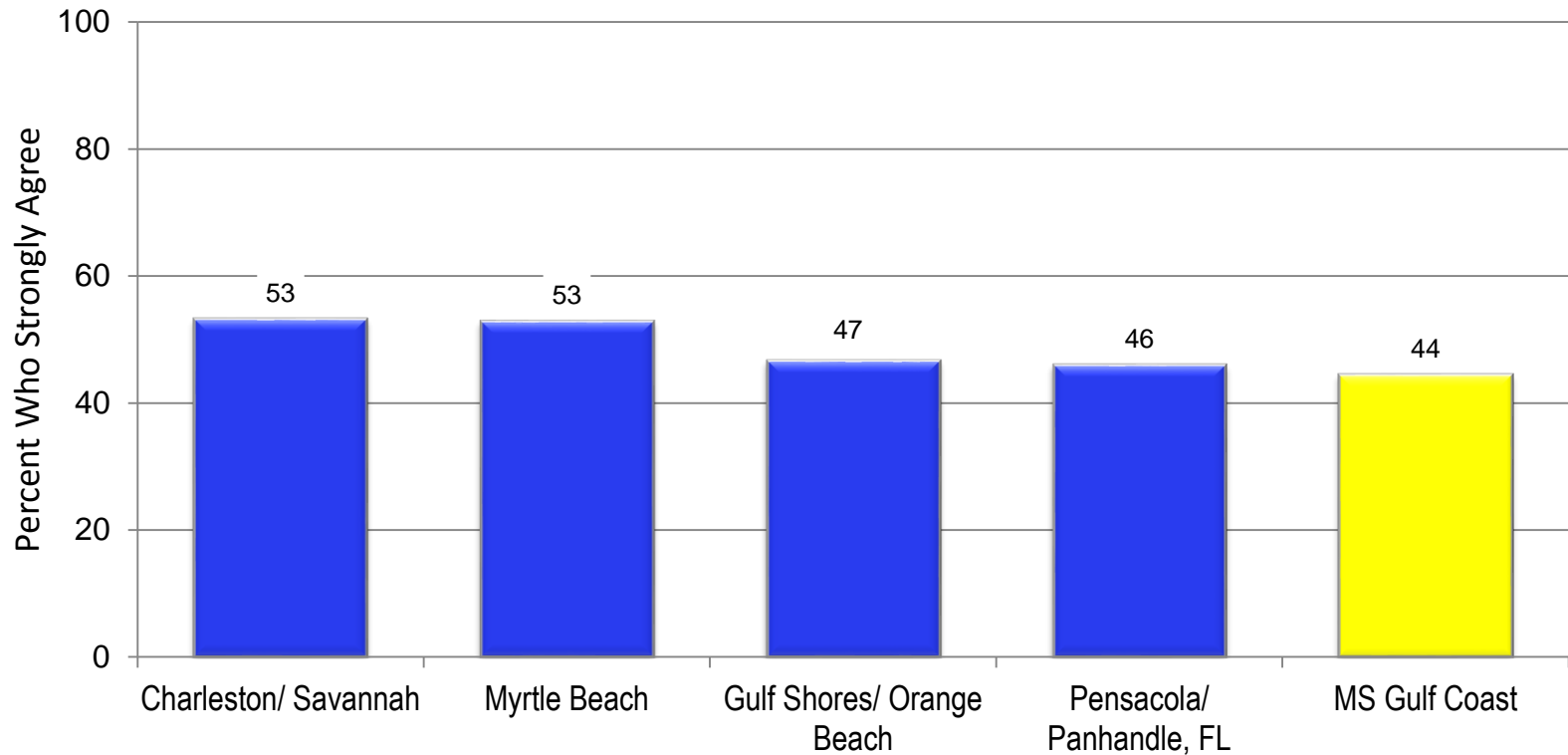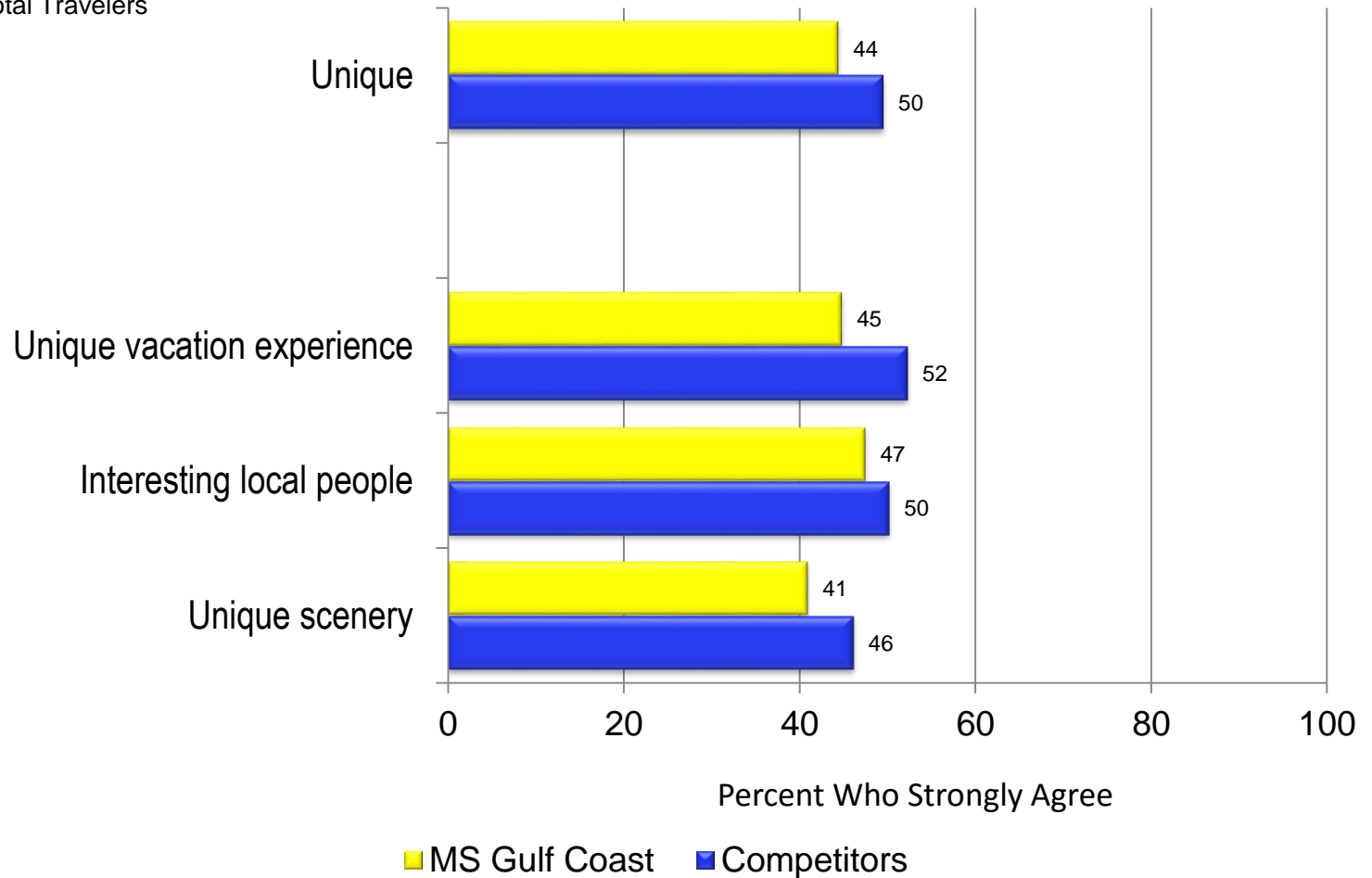| Destination | Percent Who Strongly Agree |
| --- | --- |
| Myrtle Beach | 50 |
| Charleston/ Savannah | 48 |
| Pensacola/ Panhandle, FL | 45 |
| Gulf Shores/ Orange Beach | 42 |
| MS Gulf Coast | 42 |

# Mississippi Gulf Coast's
# Image vs. Competitors — Affordable

Base: Total Travelers

# Mississippi Gulf Coast's
# Image vs. Competitors — Affordable

Base: Total Travelers



Percent Who Strongly Agree

■ MS Gulf Coast ■ Competitors
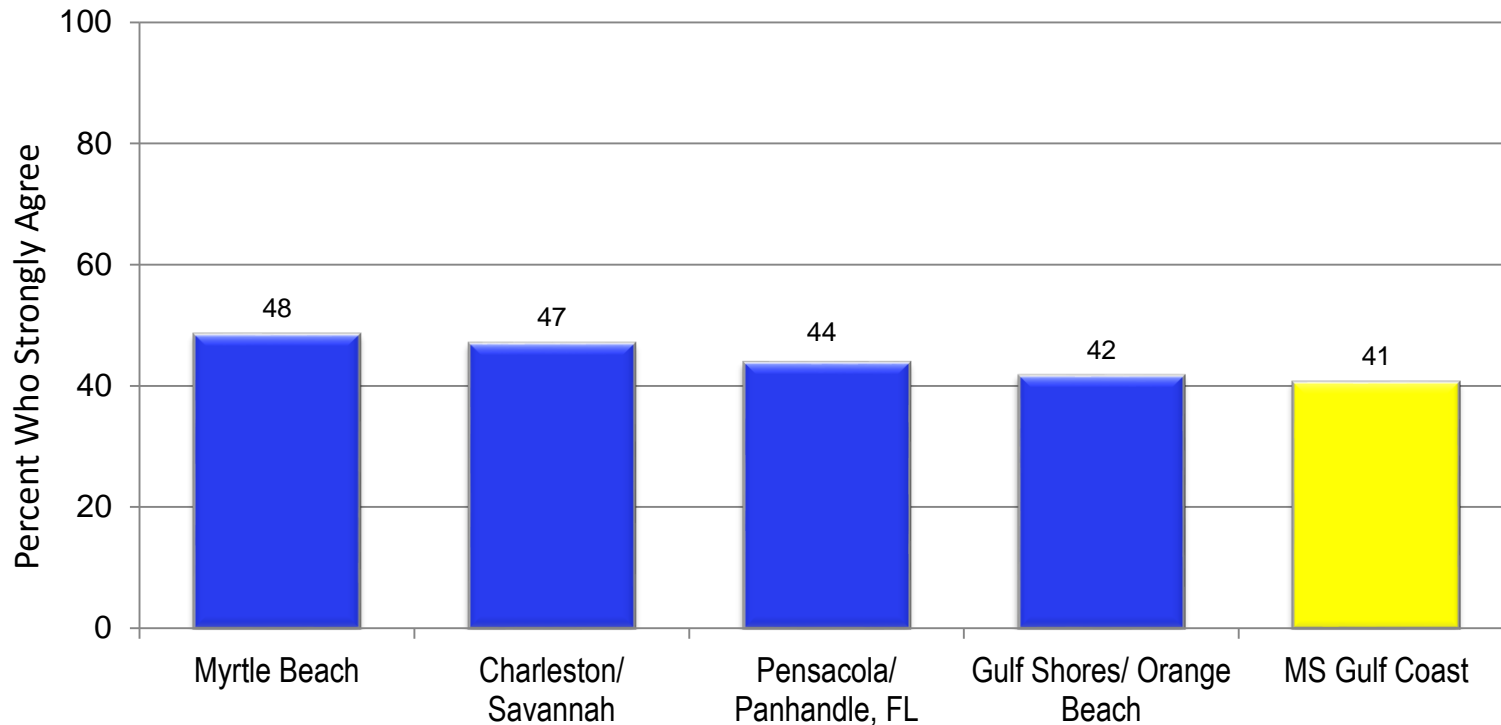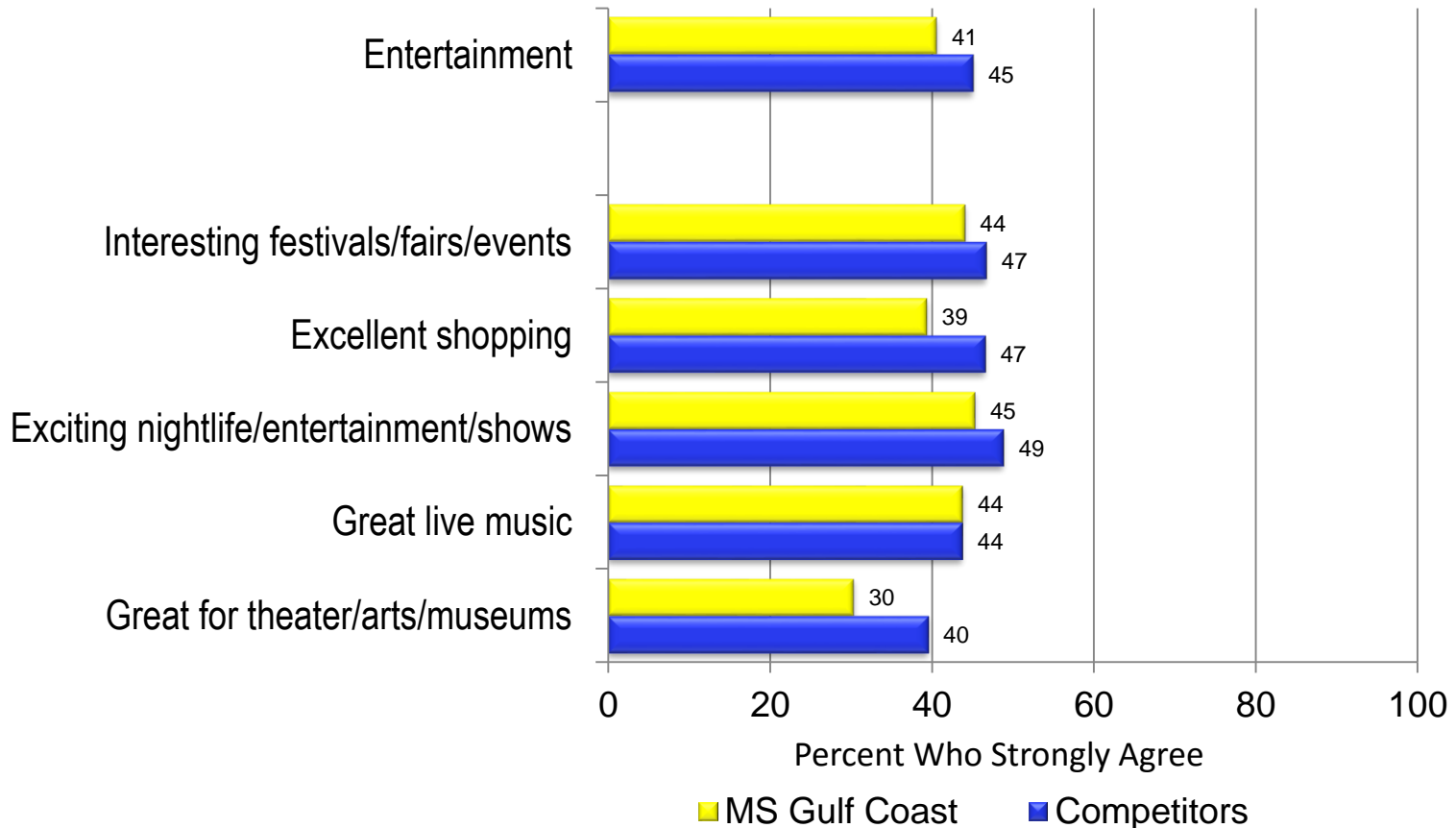
# Mississippi Gulf Coast's Image vs. Competitors — Sports and Recreation

Base: Total Travelers

# Mississippi Gulf Coast's Image vs. Competitors — Sports and Recreation
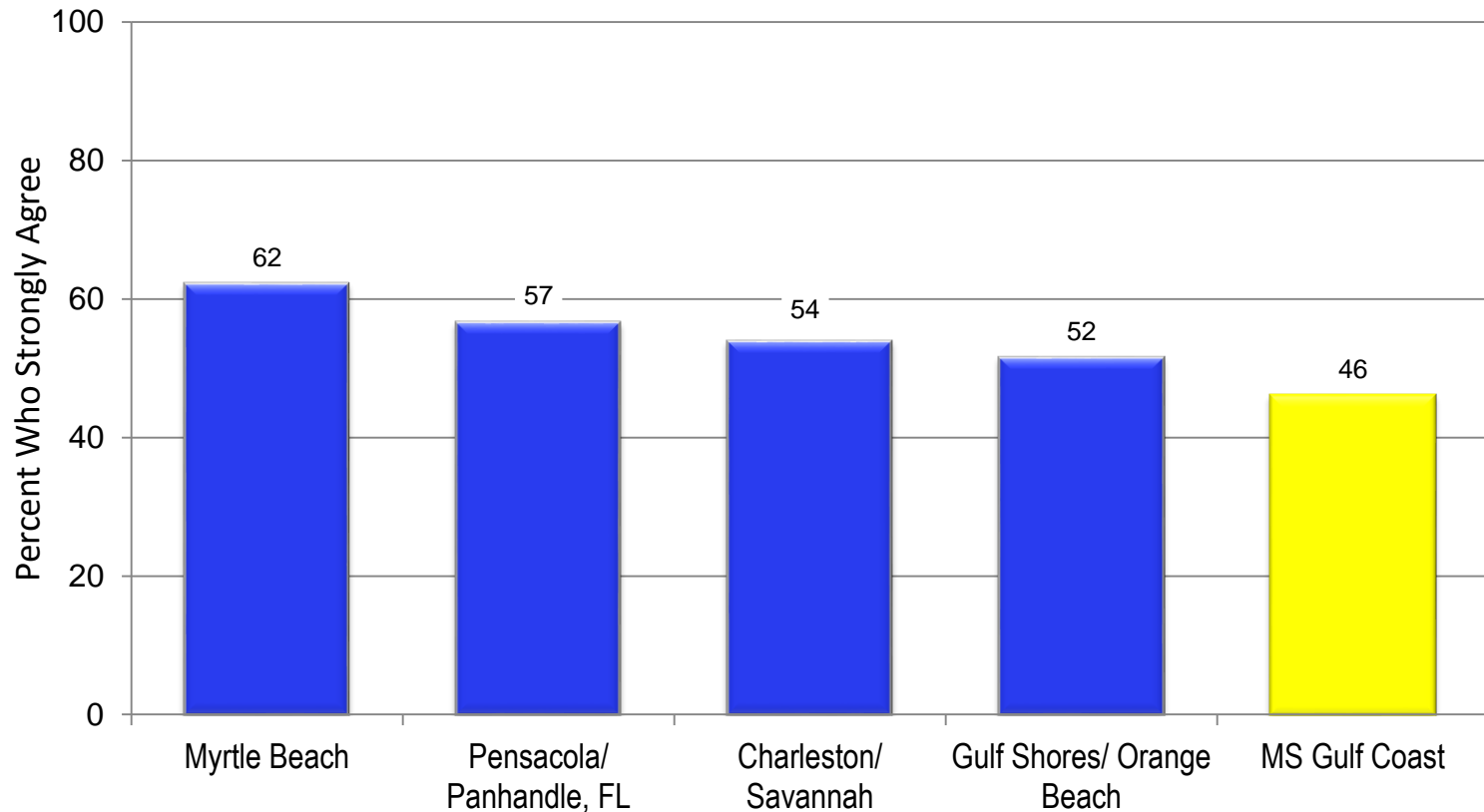
Base: Total Travelers



Percent Who Strongly Agree

| | MS Gulf Coast | Competitors |
|---|---|---|
| Sports & Recreation | 43 | 46 |
| Excellent state park facilities | 44 | 49 |
| Great for exploring nature | 47 | 49 |
| Great for outdoor adventure sports | 46 | 50 |
| Great for motorcycle touring | 40 | 45 |
| Excellent fishing | 58 | 56 |
| Good for viewing wildlife/birds | 51 | 51 |
| Good trail system | 36 | 39 |
| Great for golfers | 43 | 52 |
| Great spectator sports venues | 32 | 34 |
| Great for professional/college sports | 32 | 35 |

64
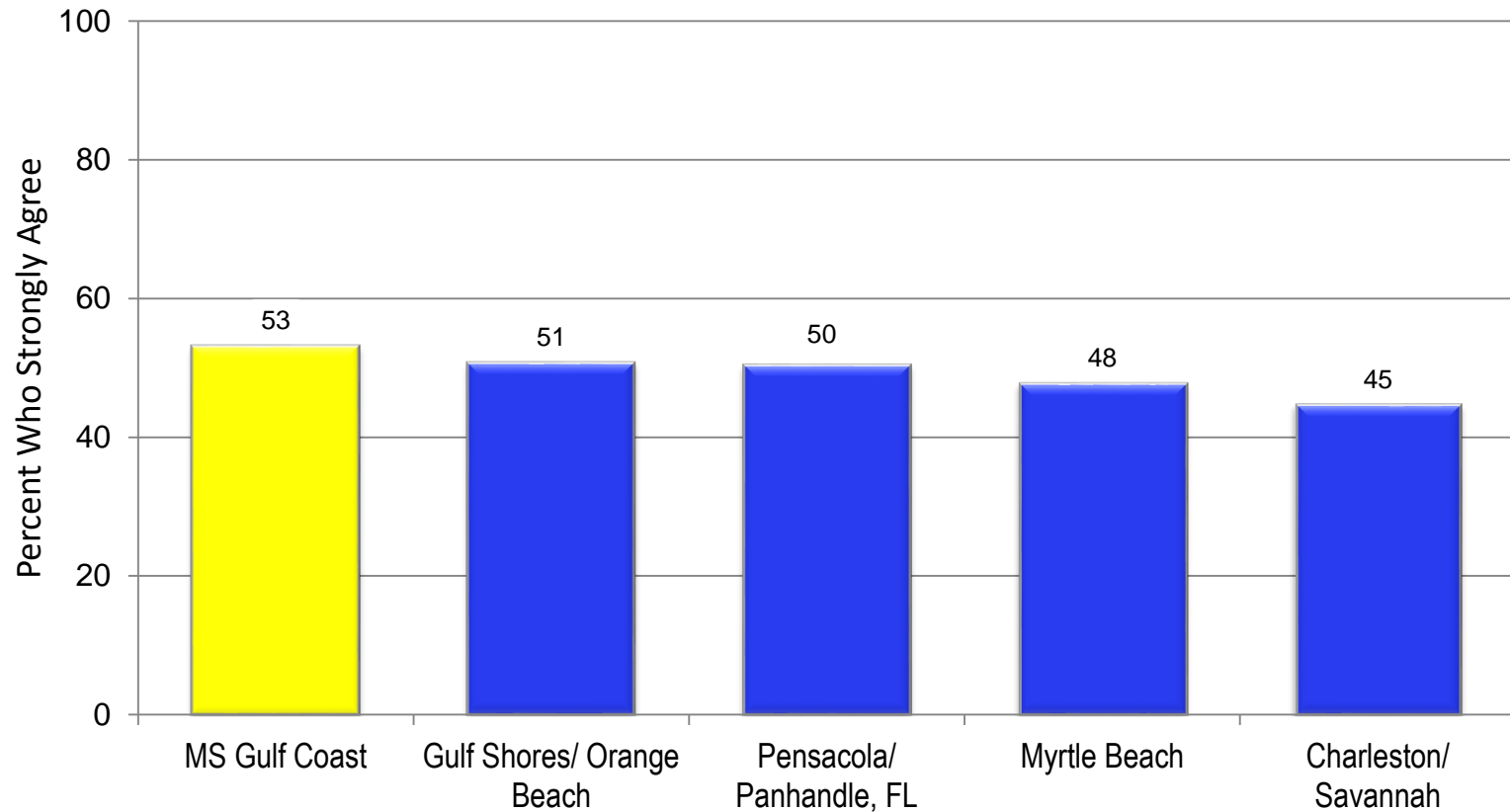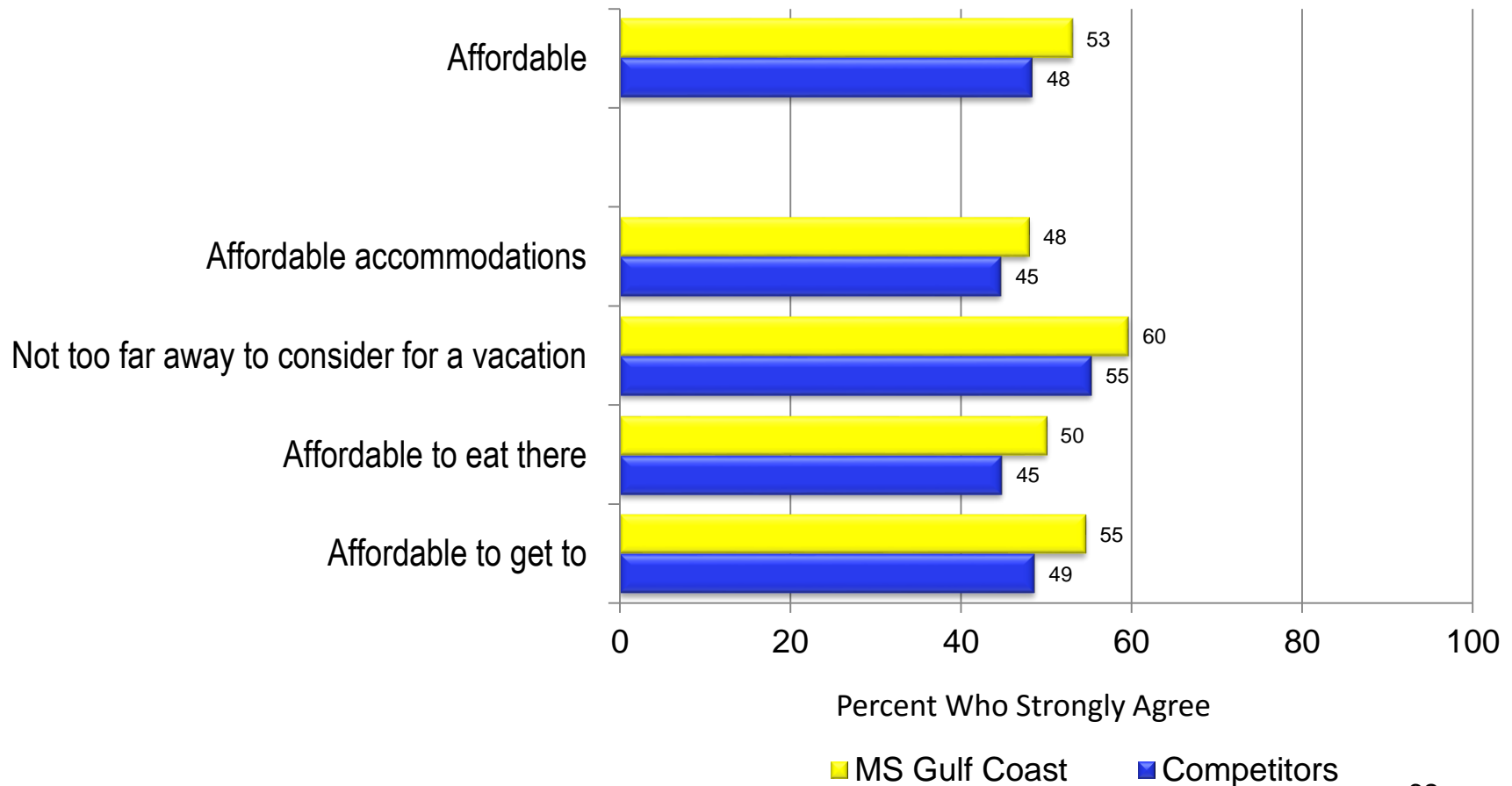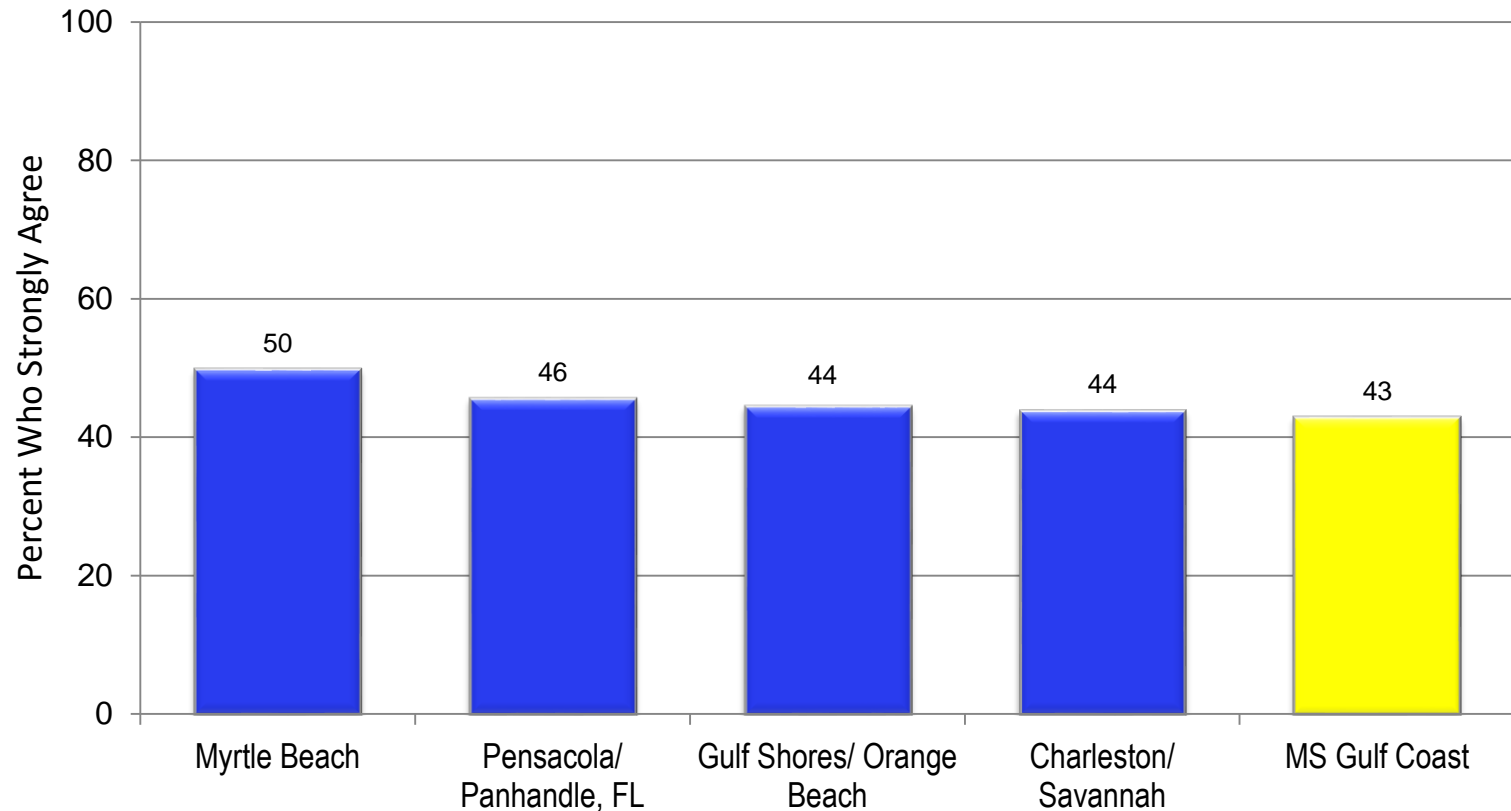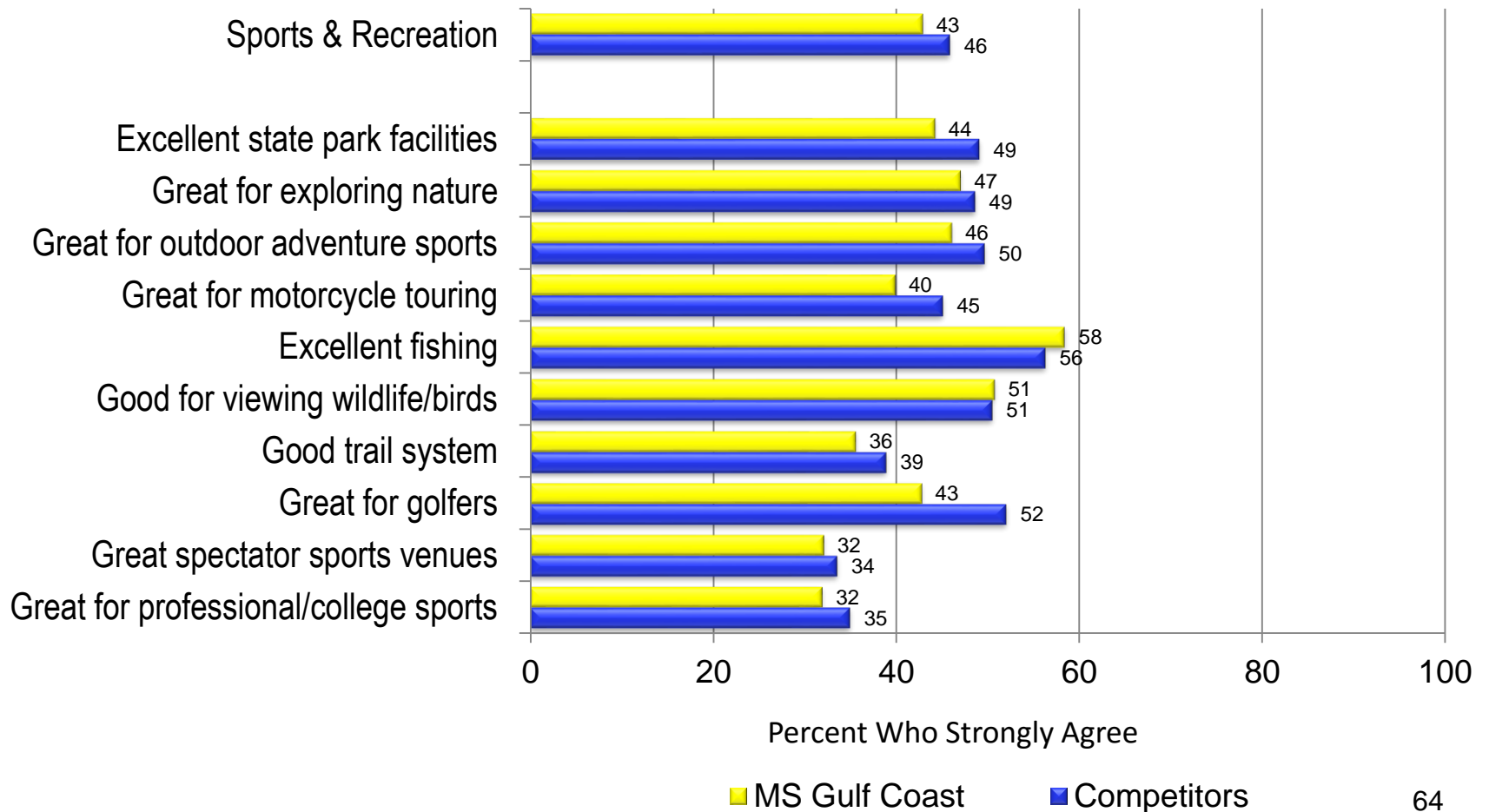
# Mississippi Gulf Coast's Image Strengths vs. Gulf Shores/ Orange Beach

Base: Total Travelers



Difference in Percent Who Strongly Agree
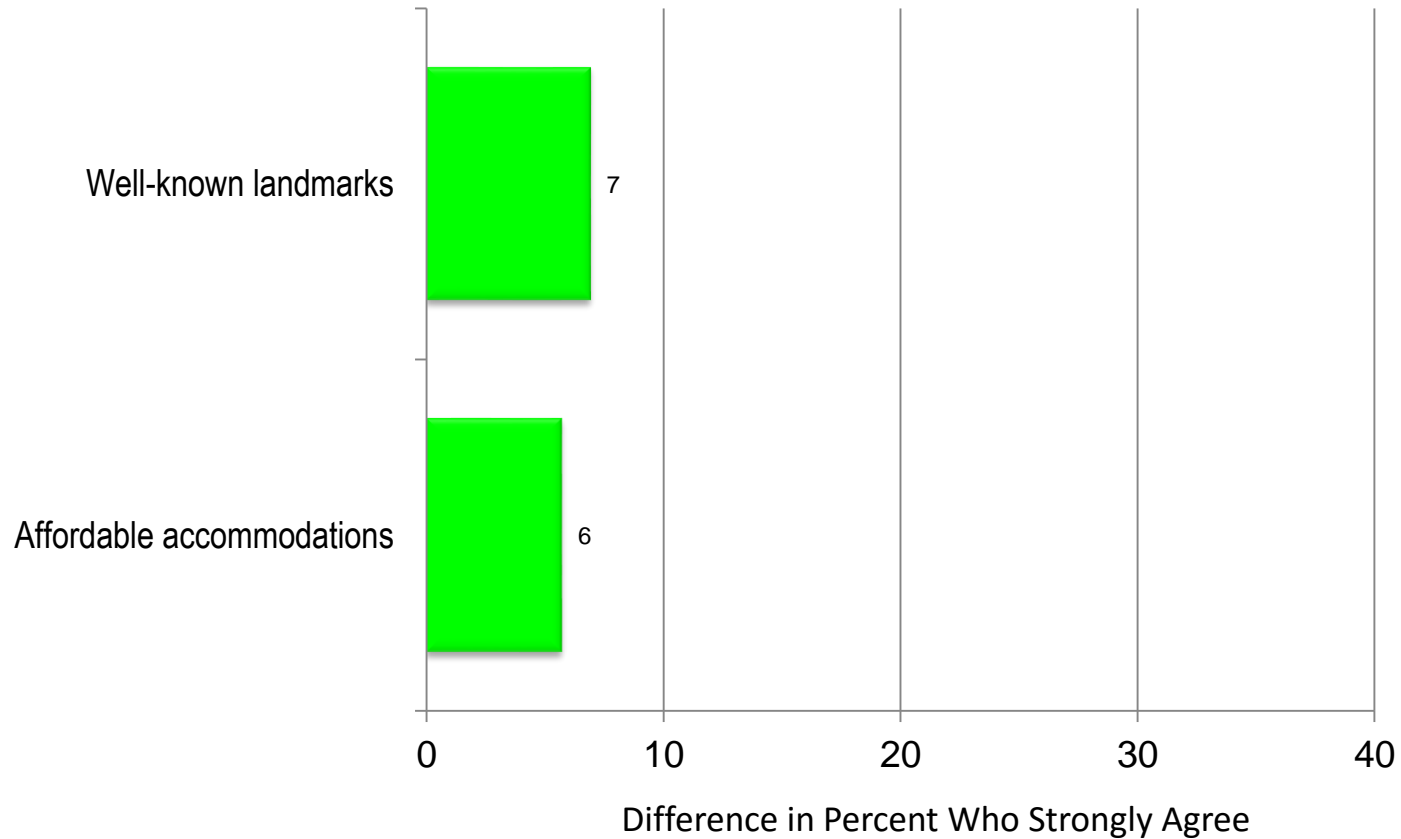
# Mississippi Gulf Coast's Image Weaknesses vs. Gulf Shores/ Orange Beach
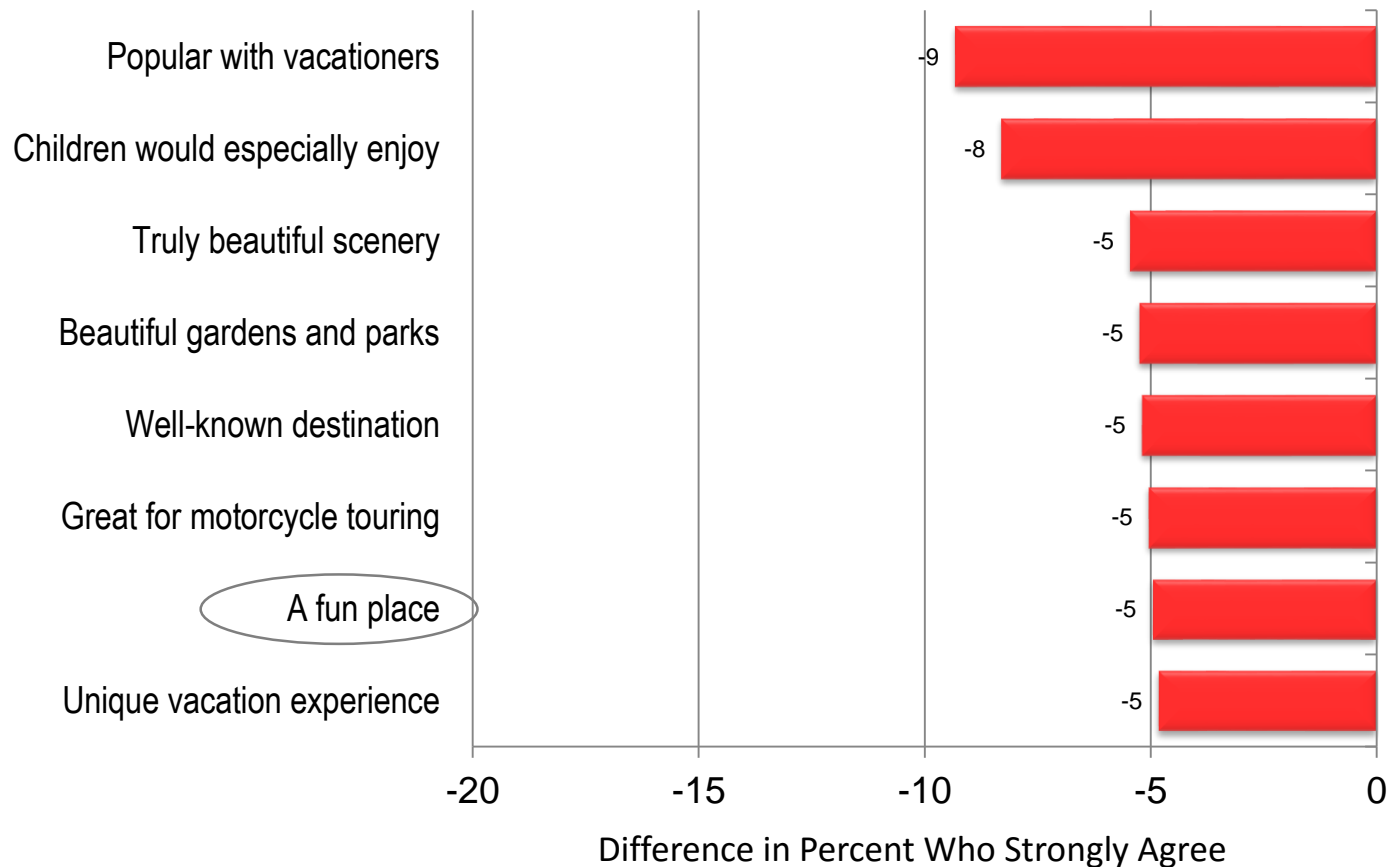
Base: Total Travelers

Chart: Difference in Percent Who Strongly Agree

| Attribute | Value |
|---|---|
| Popular with vacationers | -9 |
| Children would especially enjoy | -8 |
| Truly beautiful scenery | -5 |
| Beautiful gardens and parks | -5 |
| Well-known destination | -5 |
| Great for motorcycle touring | -5 |
| A fun place | -5 |
| Unique vacation experience | -5 |

Difference in Percent Who Strongly Agree

Note: Circled attributes are some of the most important image hot buttons for travelers

66

# Mississippi Gulf Coast's Image Strengths vs. Pensacola/ Panhandle, FL

Affordable to eat there — 5

Difference in Percent Who Strongly Agree

# Mississippi Gulf Coast's Image Weaknesses vs. Pensacola/Panhandle, FL

Base: Total Travelers

| Attribute | Difference |
|---|---|
| Well-known destination | -16 |
| Popular with vacationers | -14 |
| Children would especially enjoy | -11 |
| Excellent climate overall | -10 |
| A fun place | -9 |
| Great for golfers | -9 |
| Great for theater/arts/museums | -8 |
| A real adventure | -8 |
| An exciting place | -7 |

Difference in Percent Who Strongly Agree

Note: Circled attributes are some of the most important image hot buttons for travelers

# Mississippi Gulf Coast's Image Weaknesses vs. Pensacola/Panhandle, FL – Cont'd

Base: Total Travelers

| Attribute | Difference in Percent Who Strongly Agree |
|-----------|------------------------------------------|
| Truly beautiful scenery | -7 |
| Must see destination | -7 |
| Offers a variety of dining options | -7 |
| Good for couples | -7 |
| Excellent shopping | -6 |
| Good for an adult vacation | -6 |
| Great for professional/college sports | -5 |
| Lots of things to see and do | -5 |
| Good place for families to visit | -5 |
| Great for motorcycle touring | -5 |

Difference in Percent Who Strongly Agree

Note: Circled attributes are some of the most important image hot buttons for travelers

69

# Mississippi Gulf Coast's Image Strengths vs. Charleston/ Savannah

Base: Total Travelers



Difference in Percent Who Strongly Agree

| Category | Value |
|---|---|
| Affordable to eat there | 12 |
| Excellent fishing | 11 |
| Right distance for a weekend getaway | 11 |
| Affordable to get to | 9 |
| Not too far away to consider for a vacation | 9 |

70

# Mississippi Gulf Coast's Image Weaknesses vs. Charleston/Savannah

Base: Total Travelers



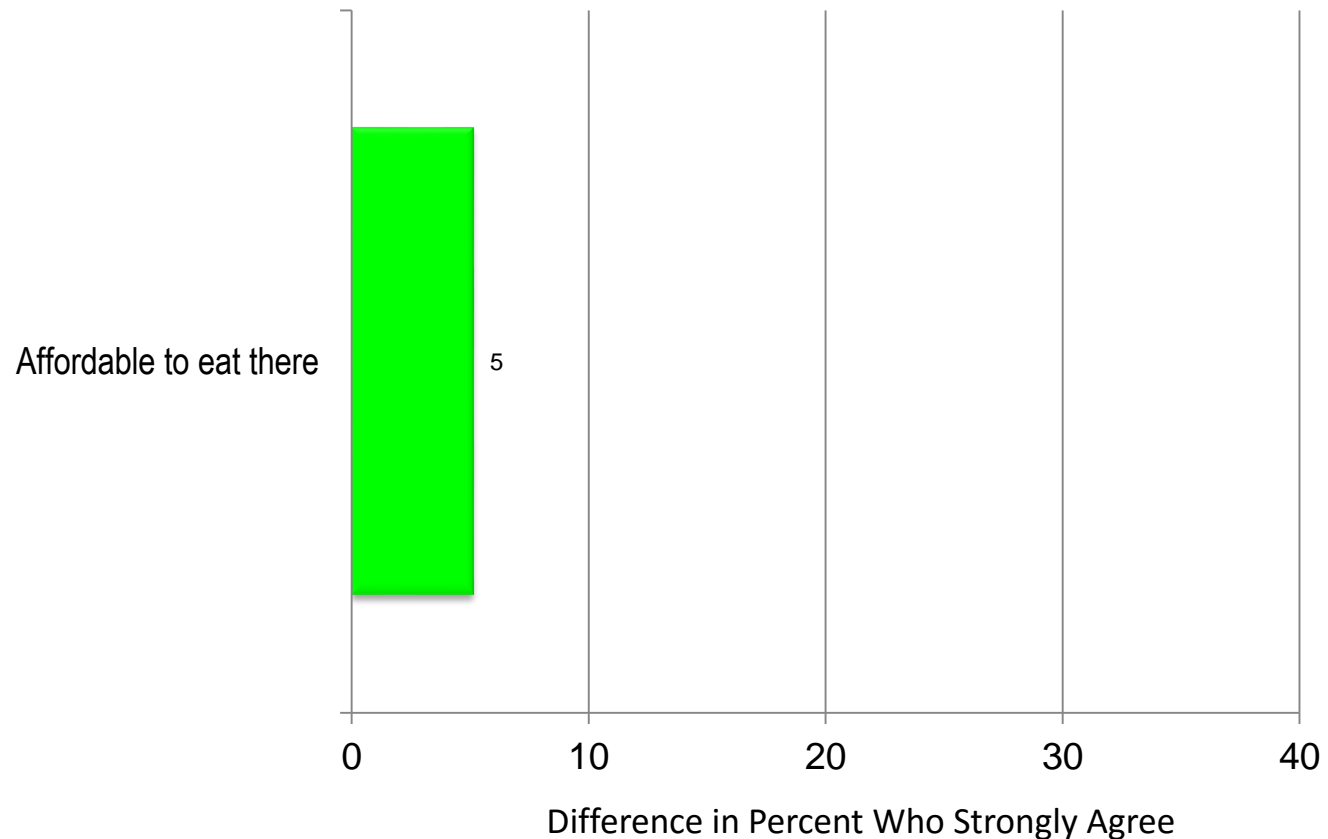| Attribute | Difference in Percent Who Strongly Agree |
|---|---|
| Noted for its history | -24 |
| Elegant, sophisticated restaurants | -21 |
| Beautiful gardens and parks | -20 |
| Well-known landmarks | -17 |
| Well-known destination | -17 |
| Great for theater/arts/museums | -13 |
| Interesting communities | -13 |
| Truly beautiful scenery | -13 |
| Lots of things to see and do | -11 |
| First-class hotels/resorts | -11 |
| Unique vacation experience | -10 |
| Excellent shopping | -10 |
| Must see destination | -10 |
| Unique scenery | -9 |
| Popular with vacationers | -9 |

Difference in Percent Who Strongly Agree

Note: Circled attributes are some of the most important image hot buttons for travelers
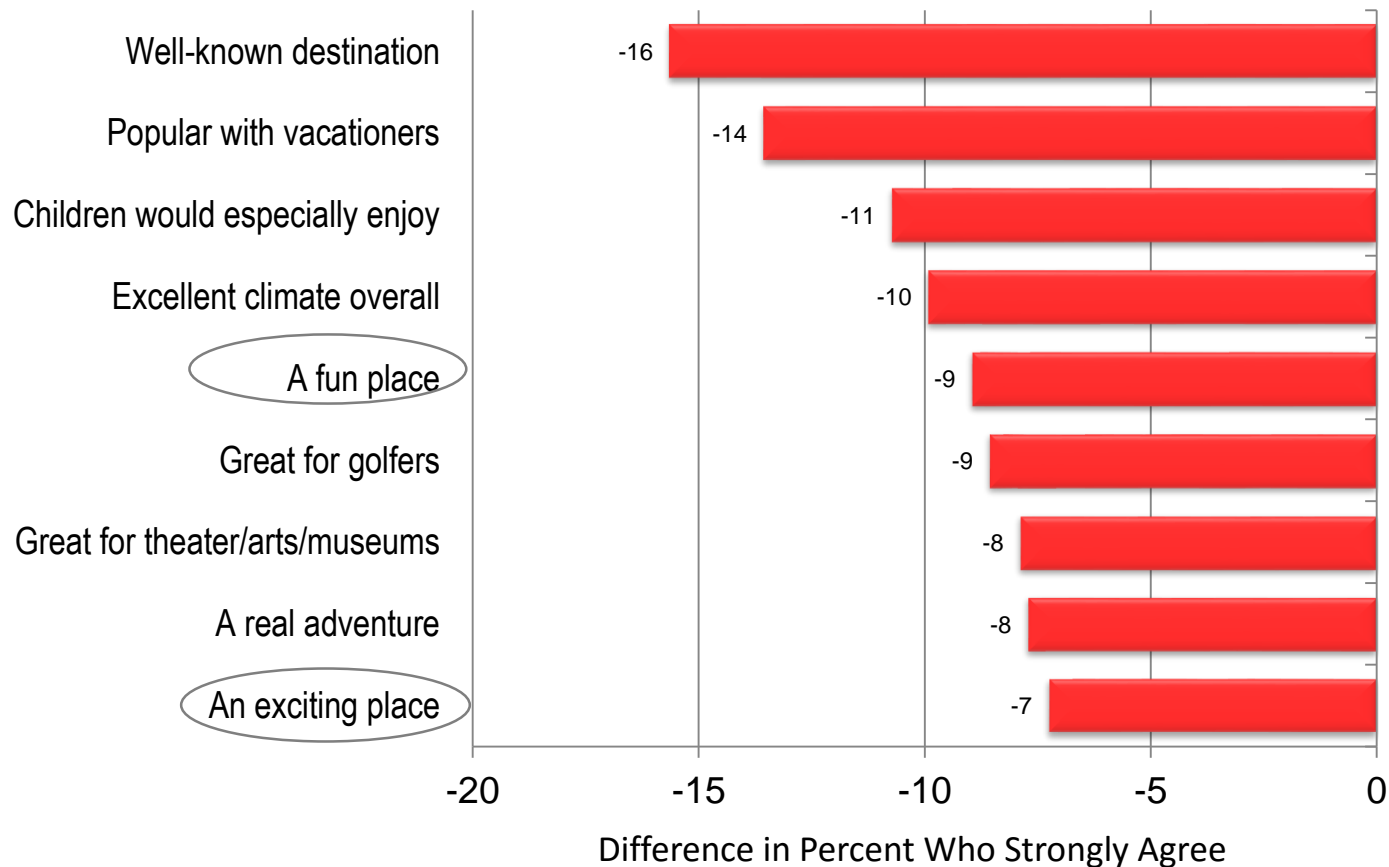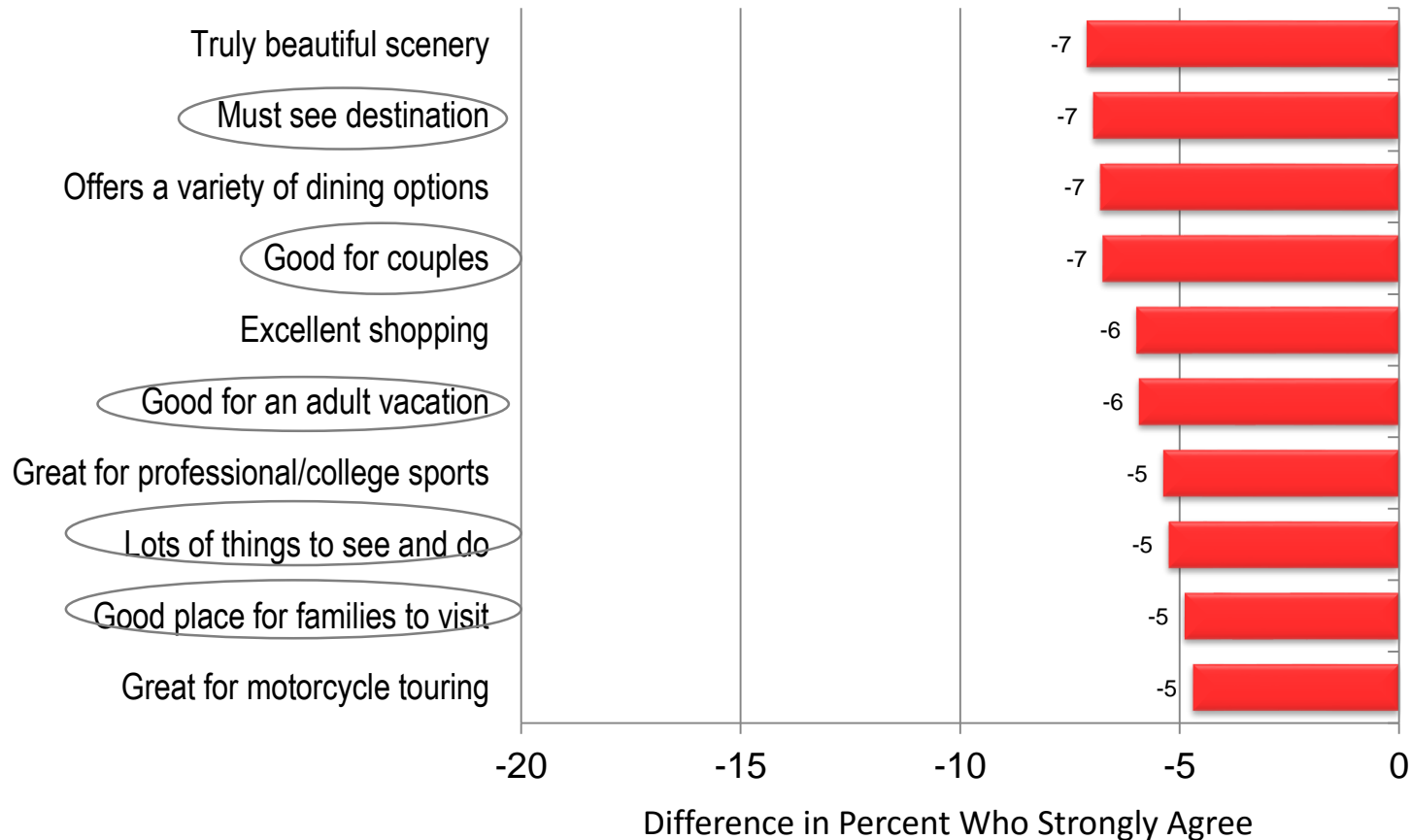
# Mississippi Gulf Coast's Image Weaknesses vs. Charleston/Savannah – Cont'd

Base: Total Travelers

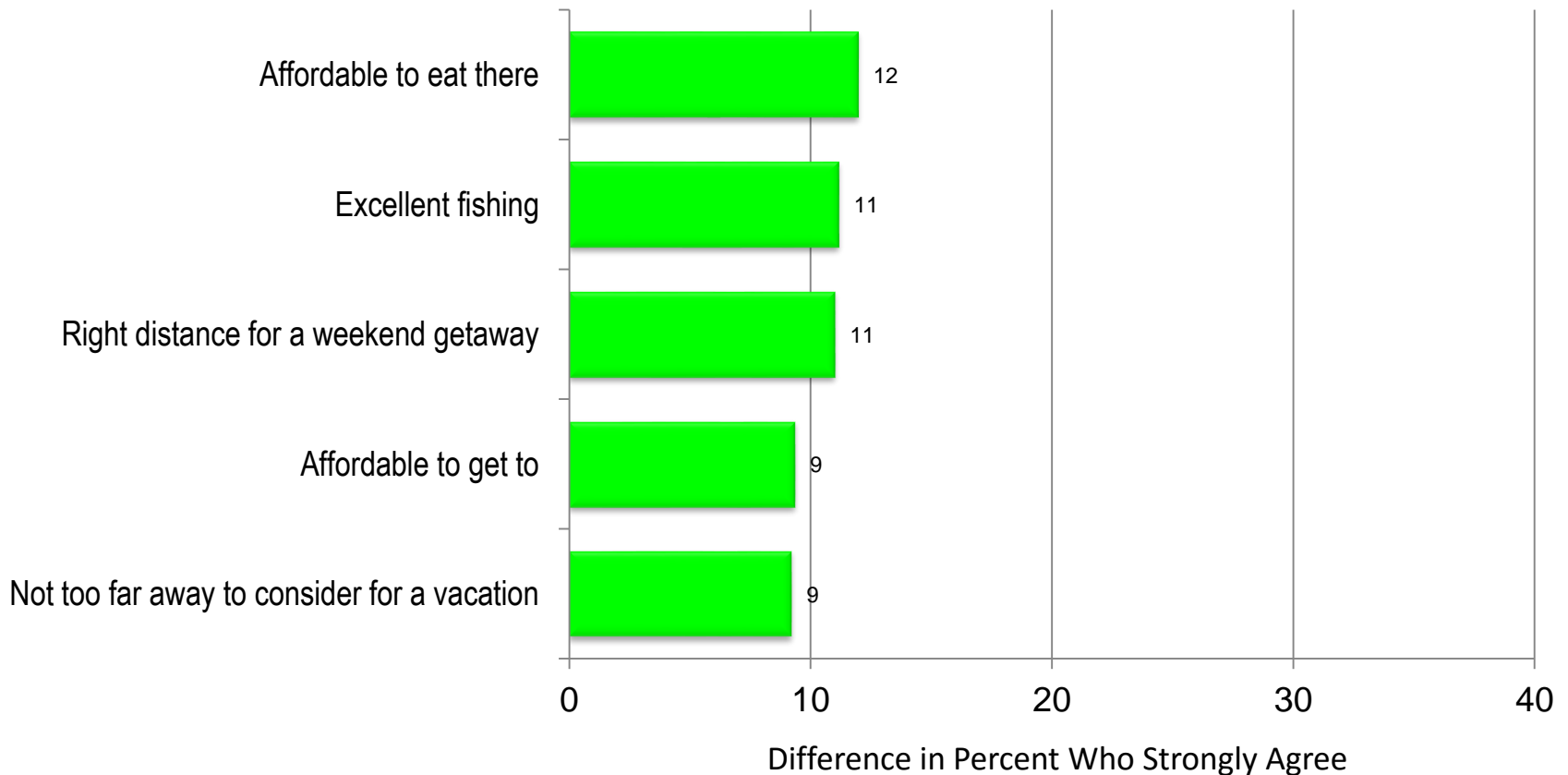| Attribute | Difference |
|---|---|
| A good contrast of seasons | -9 |
| A fun place | -8 |
| Great for golfers | -8 |
| Offers a variety of dining options | -8 |
| Interesting local people | -7 |
| A real adventure | -7 |
| Excellent state park facilities | -6 |
| Good place to relax | -6 |
| Warm, friendly people | -5 |
| Good for an adult vacation | -5 |
| Good place for families to visit | -5 |
| Interesting festivals/fairs/events | -5 |
| A place where I would feel comfortable | -5 |
| Good for couples | -5 |

Difference in Percent Who Strongly Agree

Note: Circled attributes are some of the most important image hot buttons for travelers

72

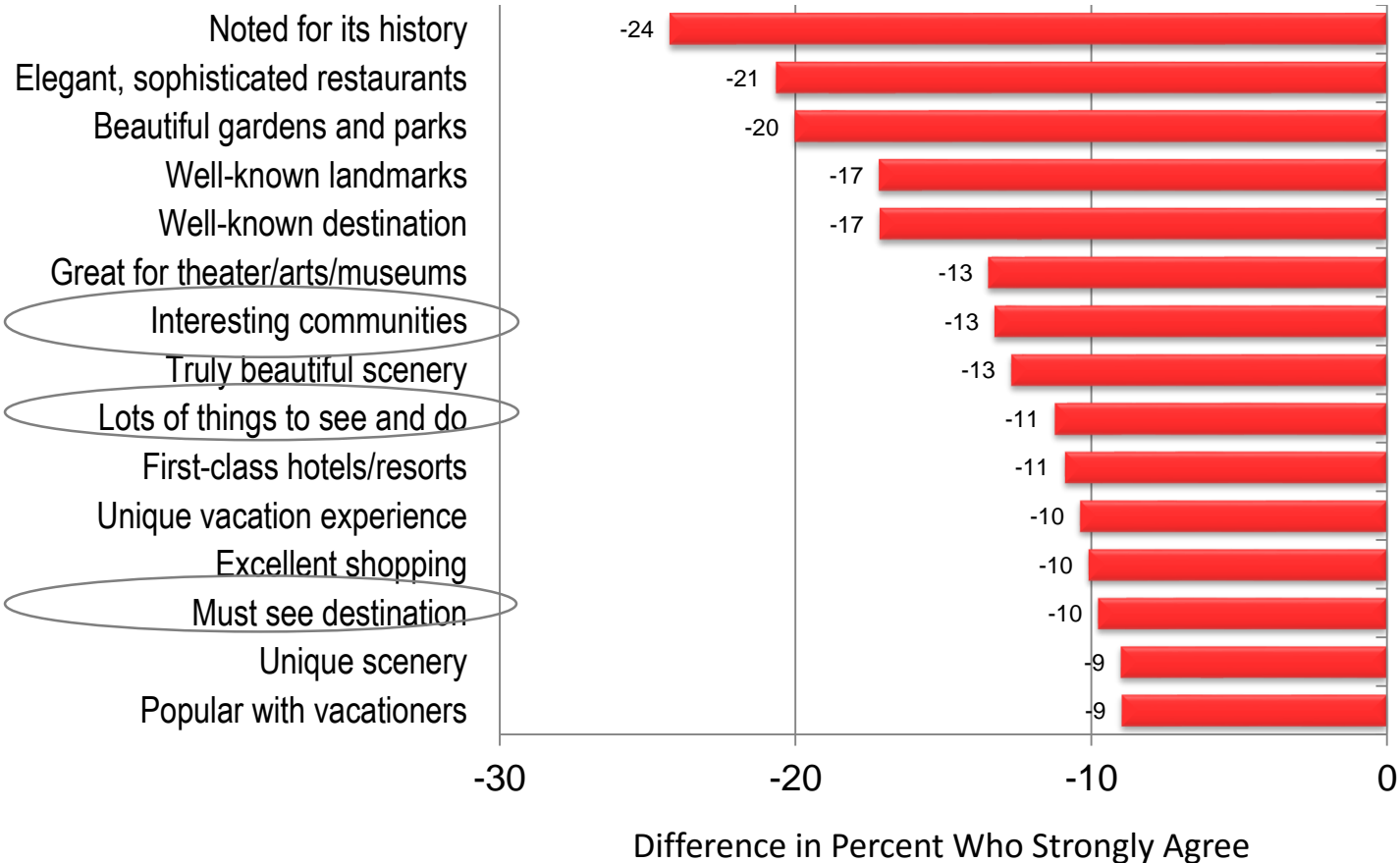# Mississippi Gulf Coast's Image Strengths vs. Myrtle Beach

Base: Total Travelers



Affordable to get to — 9

Right distance for a weekend getaway — 9

Not too far away to consider for a vacation — 7

Affordable to eat there — 5

Difference in Percent Who Strongly Agree

# Mississippi Gulf Coast's Image Weaknesses vs. Myrtle Beach

Base: Total Travelers

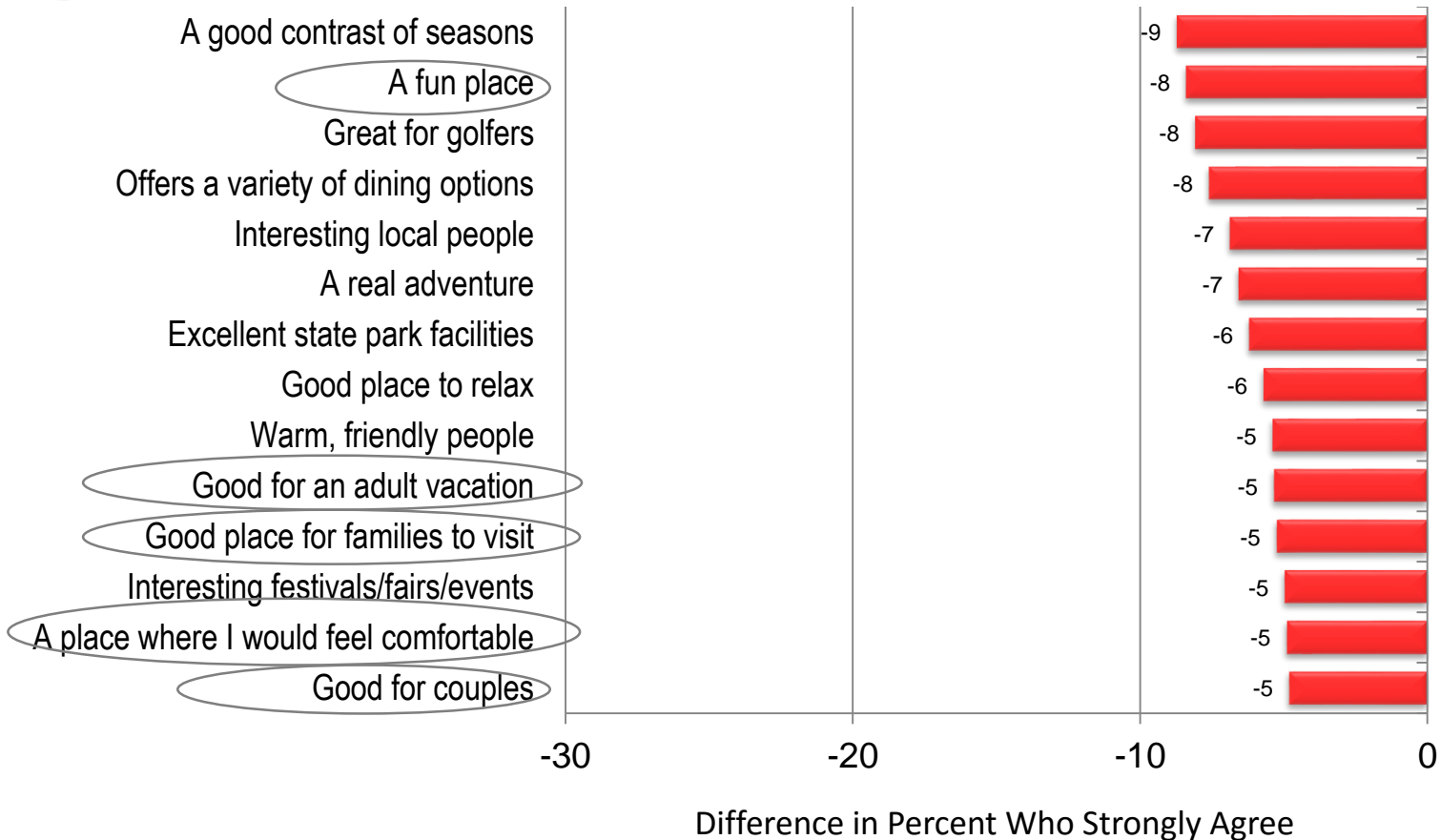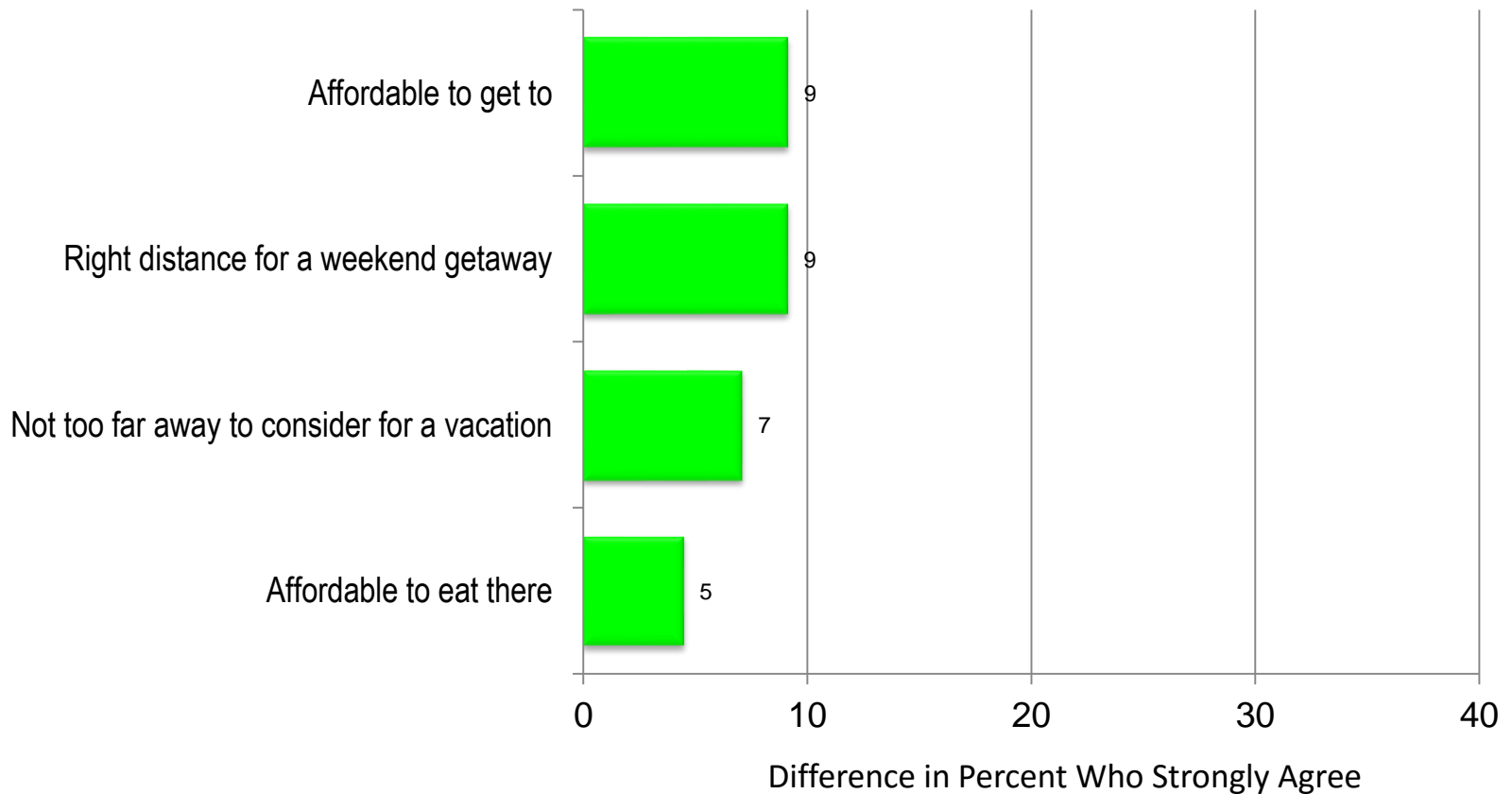| Attribute | Difference |
|---|---|
| Well-known destination | -23 |
| Popular with vacationers | -20 |
| Great for golfers | -18 |
| Elegant, sophisticated restaurants | -16 |
| First-class hotels/resorts | -14 |
| Beautiful gardens and parks | -14 |
| Must see destination | -13 |
| Good place for families to visit | -13 |
| Children would especially enjoy | -13 |
| An exciting place | -13 |
| Great for theater/arts/museums | -12 |
| Lots of things to see and do | -12 |
| Unique vacation experience | -12 |
| Truly beautiful scenery | -11 |
| Excellent shopping | -11 |

Difference in Percent Who Strongly Agree

Note: Circled attributes are some of the most important image hot buttons for travelers

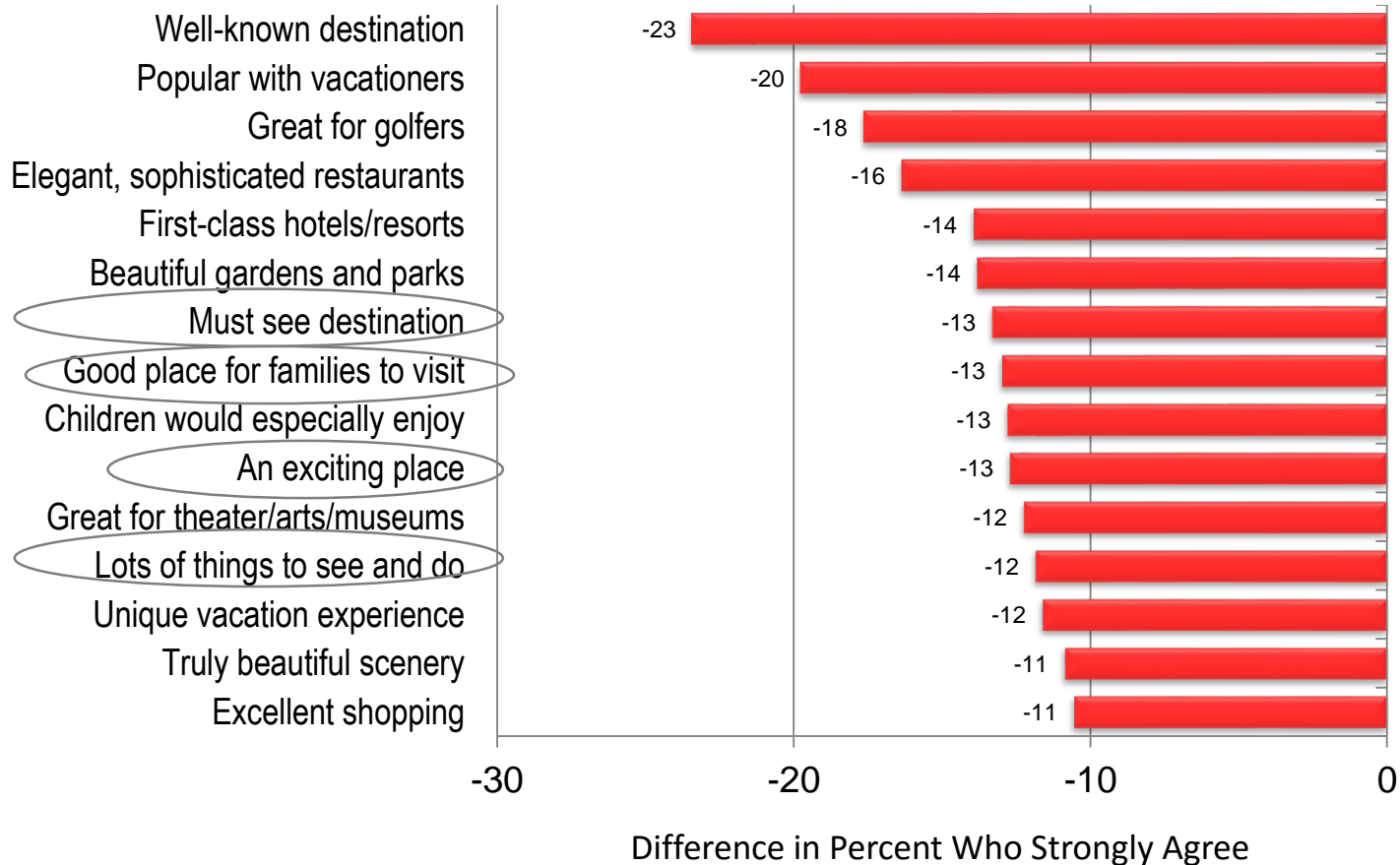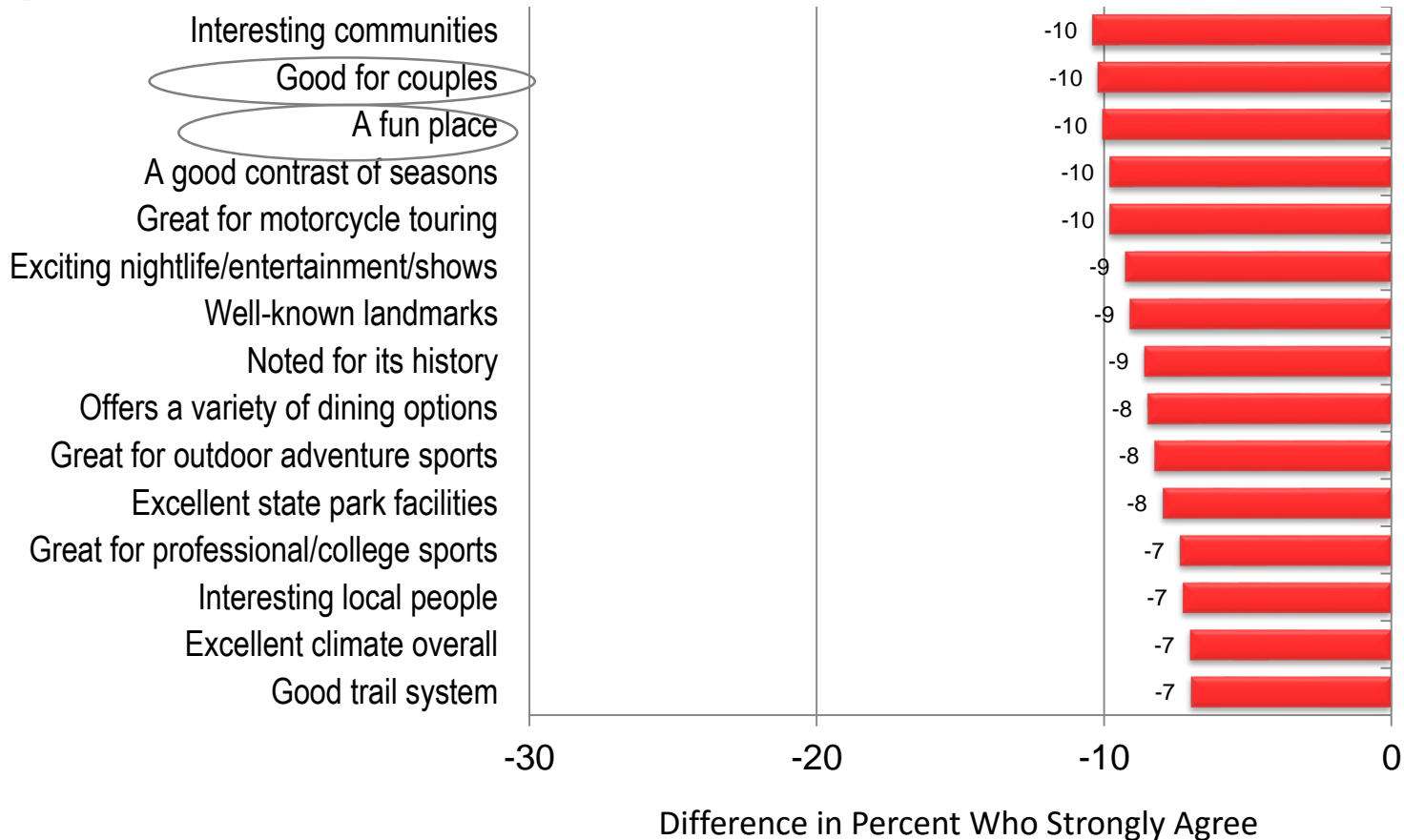# Mississippi Gulf Coast's Image Weaknesses vs. Myrtle Beach – Cont'd
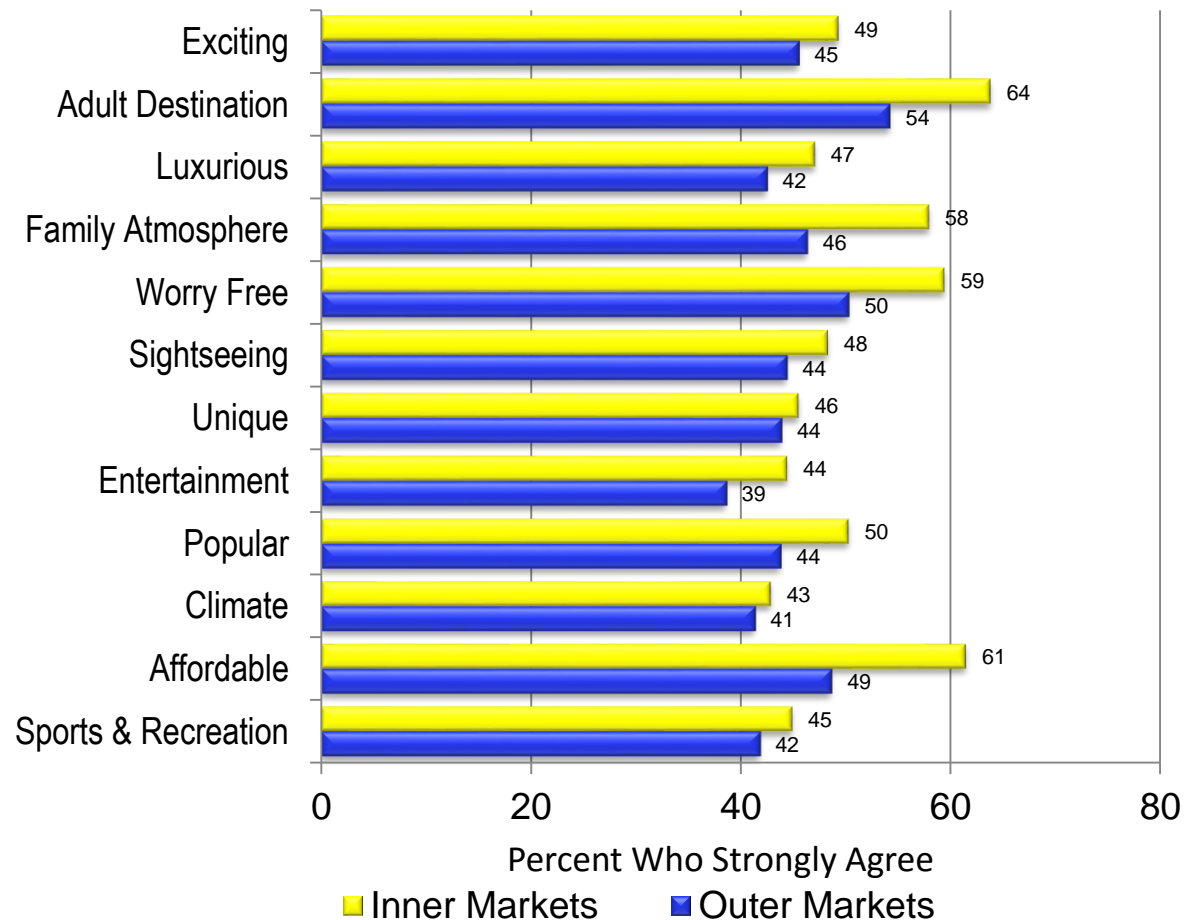


Base: Total Travelers

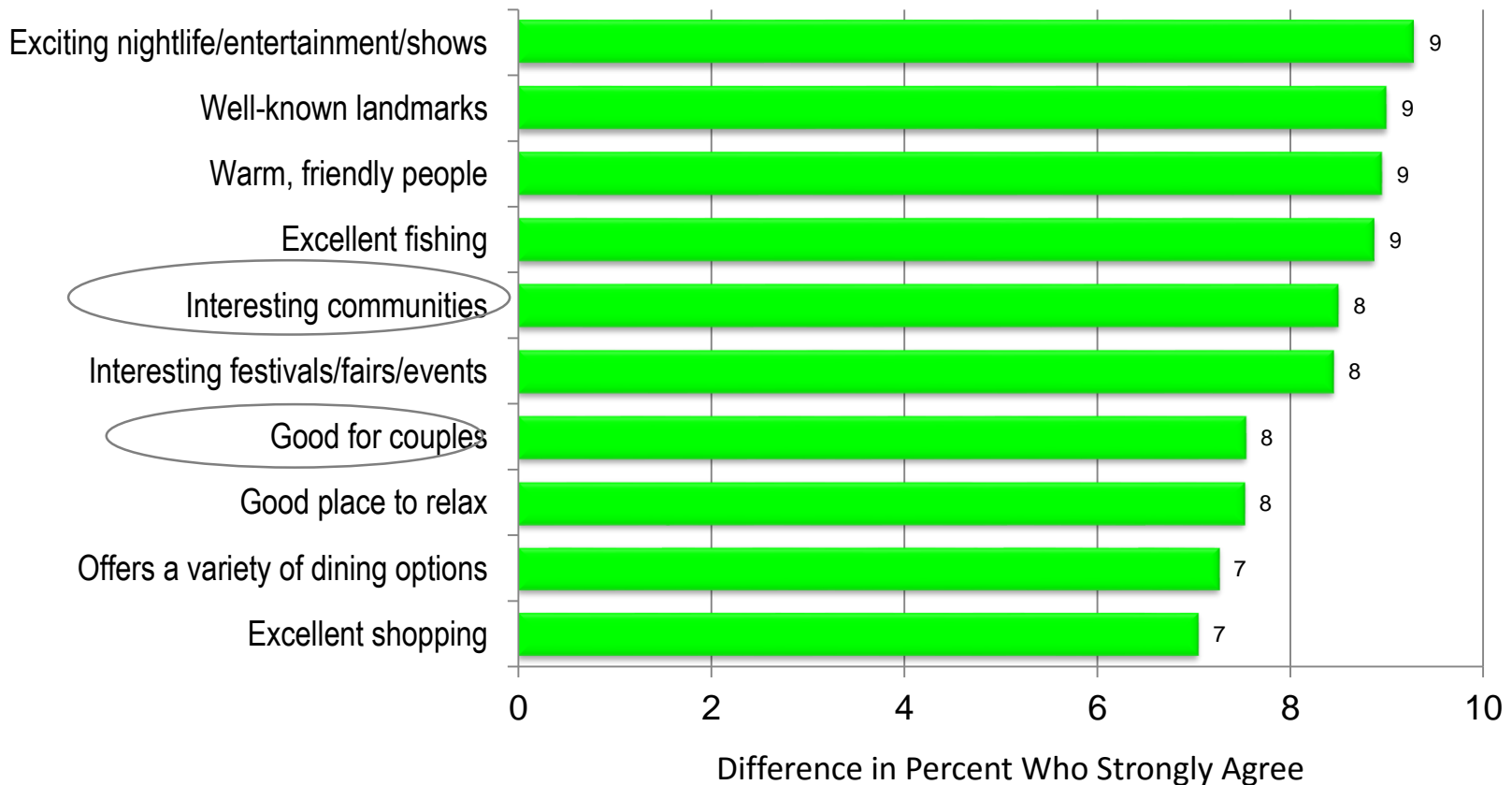| Attribute | Difference |
|---|---|
| Interesting communities | -10 |
| Good for couples | -10 |
| A fun place | -10 |
| A good contrast of seasons | -10 |
| Great for motorcycle touring | -10 |
| Exciting nightlife/entertainment/shows | -9 |
| Well-known landmarks | -9 |
| Noted for its history | -9 |
| Offers a variety of dining options | -8 |
| Great for outdoor adventure sports | -8 |
| Excellent state park facilities | -8 |
| Great for professional/college sports | -7 |
| Interesting local people | -7 |
| Excellent climate overall | -7 |
| Good trail system | -7 |

Difference in Percent Who Strongly Agree

Note: Circled attributes are some of the most important image hot buttons for travelers

# Mississippi Gulf Coast's Image
# Inner vs. Outer Markets

Base: Total Travelers

Relative Importance*

**Percent Who Strongly Agree**

| Attribute | Inner Markets | Outer Markets |
|---|---|---|
| Exciting | 49 | 45 |
| Adult Destination | 64 | 54 |
| Luxurious | 47 | 42 |
| Family Atmosphere | 58 | 46 |
| Worry Free | 59 | 50 |
| Sightseeing | 48 | 44 |
| Unique | 46 | 44 |
| Entertainment | 44 | 39 |
| Popular | 50 | 44 |
| Climate | 43 | 41 |
| Affordable | 61 | 49 |
| Sports & Recreation | 45 | 42 |

☐ Inner Markets  ■ Outer Markets

# Mississippi Gulf Coast Image
# Inner Market Strengths vs. Outer Markets

Base: Total Travelers

| Attribute | Difference |
|---|---|
| Affordable to get to | 20 |
| Right distance for a weekend getaway | 20 |
| Not too far away to consider for a vacation | 14 |
| Good place for families to visit | 14 |
| Good for an adult vacation | 12 |
| Affordable to eat there | 12 |
| First-class hotels/resorts | 11 |
| A place I would feel welcome | 10 |
| Children would especially enjoy | 9 |
| Well-known destination | 9 |

Difference in Percent Who Strongly Agree

77

Note: Circled attributes are some of the most important image hot buttons for travelers

# Mississippi Gulf Coast Image
## Inner Market Strengths vs. Outer Markets – Cont'd

Base: Total Travelers



| Attribute | Difference in Percent Who Strongly Agree |
|---|---|
| Exciting nightlife/entertainment/shows | 9 |
| Well-known landmarks | 9 |
| Warm, friendly people | 9 |
| Excellent fishing | 9 |
| Interesting communities | 8 |
| Interesting festivals/fairs/events | 8 |
| Good for couples | 8 |
| Good place to relax | 8 |
| Offers a variety of dining options | 7 |
| Excellent shopping | 7 |

Difference in Percent Who Strongly Agree

Note: Circled attributes are some of the most important image hot buttons for travelers

# Mississippi Gulf Coast's Product Delivery

# Mississippi Gulf Coast's Product Delivery

◉ Another way to look at the image data is to compare the ratings by respondents who have not visited the Mississippi Gulf Coast to those who have visited recently. In effect then you are looking at expectations of the Mississippi Gulf Coast visit (from the non-visitors) vs. product delivery (ratings of recent visitors).

◉ In a perfect world the ratings are equal indicating all expectations are being met. When the experience falls short of expectations, there may be a problem with the product. When experience exceeds expectations as it does for the Mississippi Gulf Coast, it indicates that there is a great opportunity to educate those who do not know how wonderful the Mississippi Gulf Coast is or to correct misperceptions.

# Product Delivery Impacts

- The image ratings for the Mississippi Gulf Coast are much higher among the Mississippi Gulf Coast visitors on all dimensions as compared to those who have not visited.

- Previously identified weakness are overcome by experiencing the Mississippi Gulf Coast:
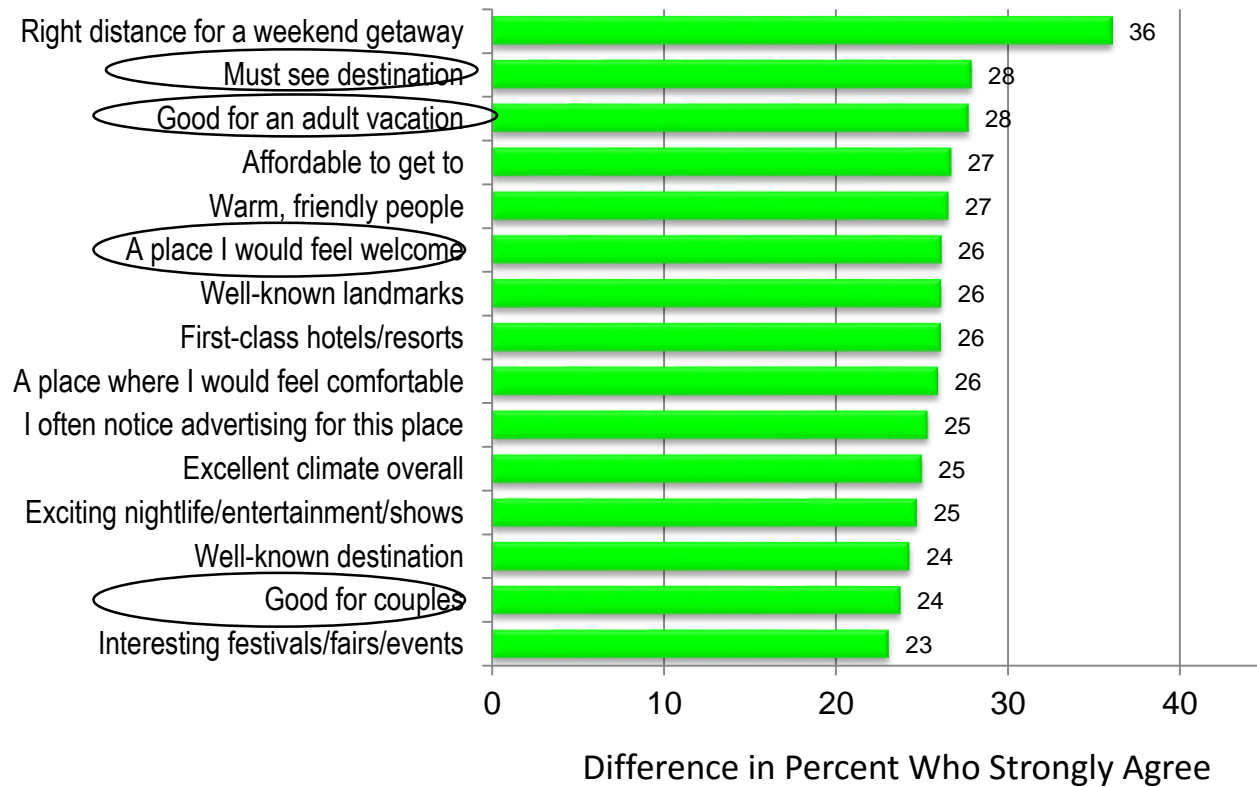  - Well-known destination
  - Popular with vacationers

- Other Hot Buttons are positively impacted by the Mississippi Gulf Coast experience are:
  - Good place for families
  - Lots to see and do
  - Good for a adult vacation
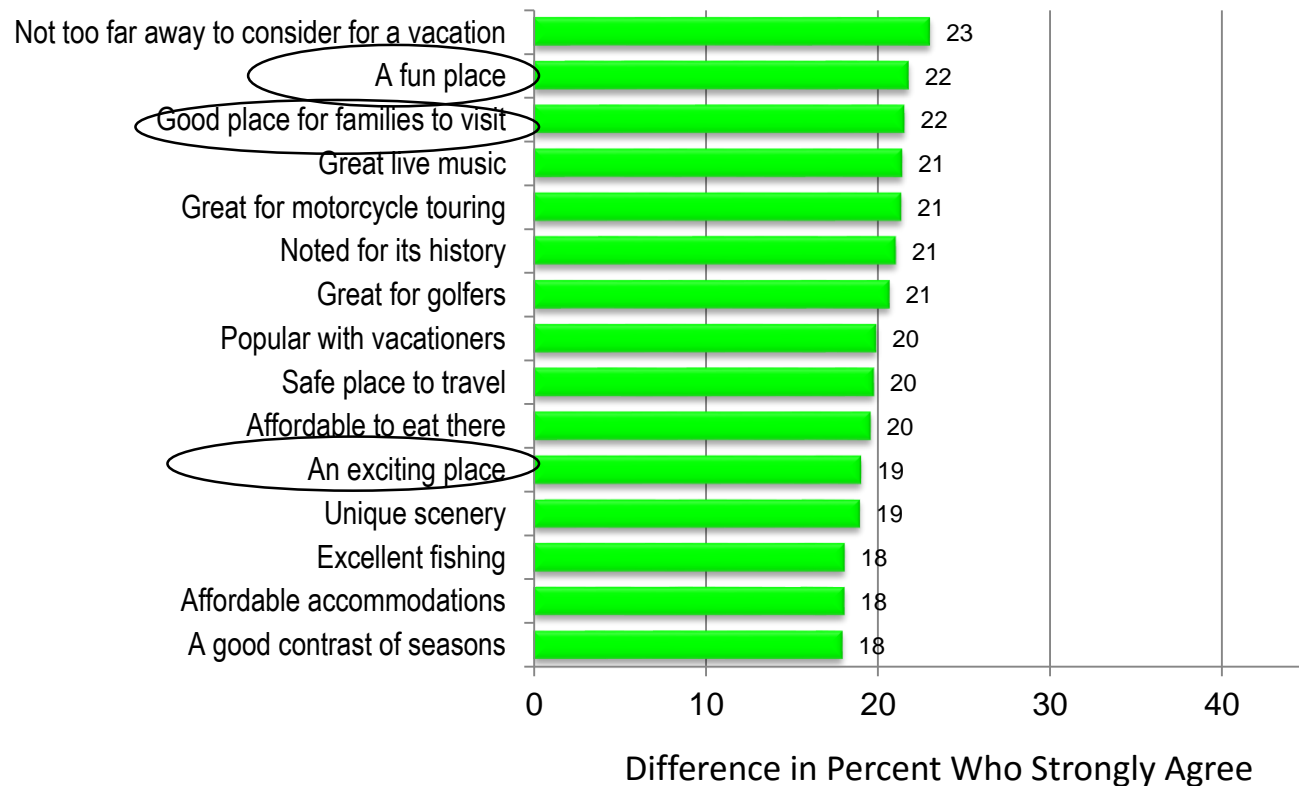  - A fun place

# Mississippi Gulf Coast's Product vs. Image

Percent Who Strongly Agree

| Attribute | Recent Visitors* | Never Visited |
|---|---|---|
| Exciting | 59 | 38 |
| Adult Destination | 72 | 47 |
| Luxurious | 57 | 35 |
| Family Atmosphere | 62 | 42 |
| Worry Free | 67 | 43 |
| Sightseeing | 57 | 40 |
| Unique | 54 | 39 |
| Entertainment | 53 | 33 |
| Popular | 59 | 36 |
| Climate | 54 | 33 |
| Affordable | 66 | 44 |
| Sports & Recreation | 52 | 37 |

■ Recent Visitors*   ■ Never Visited
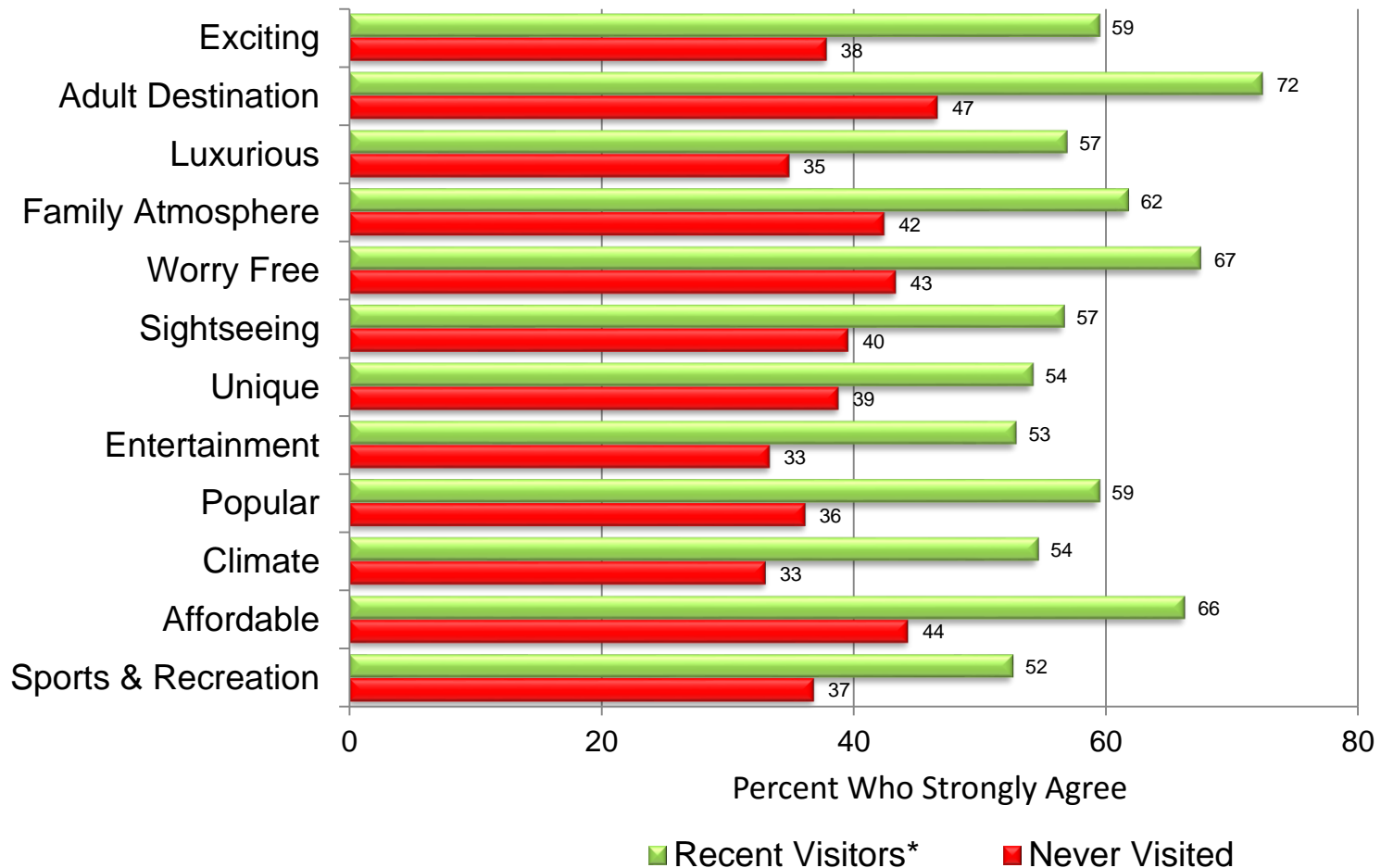
* Visited in the past 2 years

# Top Product Strengths vs. Image



| Attribute | Difference in Percent Who Strongly Agree |
|---|---|
| Right distance for a weekend getaway | 36 |
| Must see destination | 28 |
| Good for an adult vacation | 28 |
| Affordable to get to | 27 |
| Warm, friendly people | 27 |
| A place I would feel welcome | 26 |
| Well-known landmarks | 26 |
| First-class hotels/resorts | 26 |
| A place where I would feel comfortable | 26 |
| I often notice advertising for this place | 25 |
| Excellent climate overall | 25 |
| Exciting nightlife/entertainment/shows | 25 |
| Well-known destination | 24 |
| Good for couples | 24 |
| Interesting festivals/fairs/events | 23 |

Difference in Percent Who Strongly Agree

* Circled attributes are some of the most important image hot buttons for travelers

83

# Top Product Strengths vs. Image – Cont'd



| Attribute | Difference in Percent Who Strongly Agree |
|---|---|
| Not too far away to consider for a vacation | 23 |
| A fun place | 22 |
| Good place for families to visit | 22 |
| Great live music | 21 |
| Great for motorcycle touring | 21 |
| Noted for its history | 21 |
| Great for golfers | 21 |
| Popular with vacationers | 20 |
| Safe place to travel | 20 |
| Affordable to eat there | 20 |
| An exciting place | 19 |
| Unique scenery | 19 |
| Excellent fishing | 18 |
| Affordable accommodations | 18 |
| A good contrast of seasons | 18 |

Difference in Percent Who Strongly Agree

* Circled attributes are some of the most important image hot buttons for travelers

# Mississippi Gulf Coast's 2015 Advertising Campaign

# Mississippi Gulf Coast's Advertising Markets

| Outer Markets | Inner Markets | |
|---|---|---|
| Houston DMA | New Orleans DMA | Monroe, LA DMA |
| Atlanta DMA | Mobile DMA | Panama City DMA |
| Birmingham DMA | Baton Rouge DMA | Hattiesburg DMA |
| Memphis DMA | Jackson, MS DMA | Lake Charles, LA DMA |
| Little Rock DMA | Tallahassee DMA | Dothan DMA |
| | Montgomery DMA | Alexandria, LA DMA |
| | Lafayette DMA | Greenwood-Greenville, MA DMA |
| | Columbus, GA DMA | Meridian, MS |
| | Columbus-Tupelo, MS DMA | |

# Creative

# Sample of Digital Ads Run

# Advertising Awareness
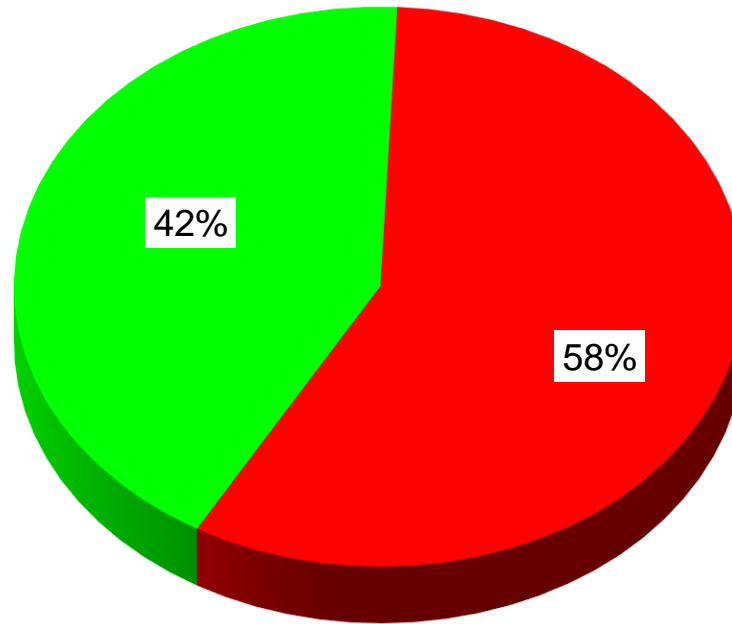
# Advertising Awareness

- 42% of all the respondents recalled seeing at least one of the Mississippi Gulf Coast's travel ads. The level is judged to be at a good level.  Awareness is similar for both the inner markets and the outer markets.

  - *The awareness is similar for – digital (34%) and TV/Web Video (33%). One fourth of travelers that saw <u>both</u> the digital and TV/Web Video advertising.*

  - *Awareness of the various digital ads are similar.  Each traveler is likely to have seen at least two different digital ads.*

  - *For the TV/Web Video, both Couples and Three Guys executions were seen at approximately the same level.  The awareness numbers indicated that more than one execution was seen the aware traveler.*

# Awareness of 2015
# Mississippi Gulf Coast's Advertising

Base: Total Travelers



42%

58%

■ Aware   ■ Unaware

# Awareness* by Advertising Market

Base: Total Travelers

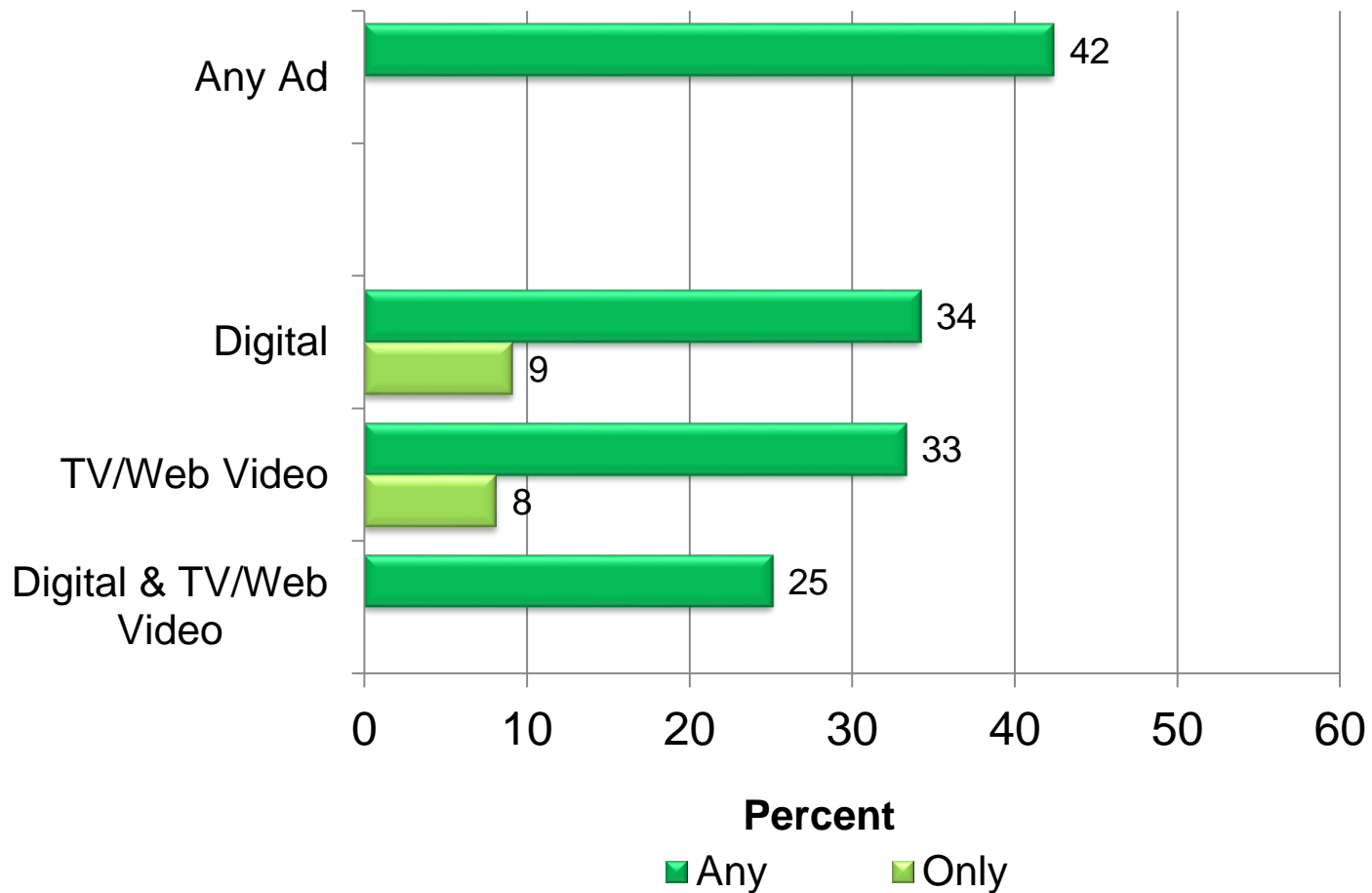| Market | Ad Awareness |
|---|---|
| **Outer Markets** | **42.2%** |
| Houston | 39.9% |
| Atlanta | 43.4% |
| Birmingham | 38.6% |
| Memphis | 54.2% |
| Little Rock | 40.8% |
| **Inner Markets**** | **42.7%** |

*Saw at least one ad

** Includes *New Orleans DMA, Mobile DMA, Baton Rouge DMA, Jackson, MS DMA, Tallahassee DMA, Montgomery DMA, Lafayette DMA, Columbus, GA DMA, Columbus-Tupelo, MS DMA, Monroe, LA DMA, Panama City DMA, Hattiesburg DMA, Lake Charles DMA, Dothan DMA, Alexandria DMA, Greenwood-Greenville, MS DMA, Meridian DMA*

# Awareness by Type of Media

**Percent**

■ Any   ■ Only

93

# Awareness of Individual Ads — Digital

Base: Total Travelers

| Category | Percent |
|---|---|
| Any Digital | 34 |
| Culture and History Compilation | 16 |
| Casino Compilation | 16 |
| Fishing and Boating Compilatiion | 15 |
| Special Events Compilation #2 | 14 |
| Outdoors and Ecotouism Compilation | 13 |
| Special Events Compilation #1 | 13 |
| Golf Compilation | 12 |

**Percent**
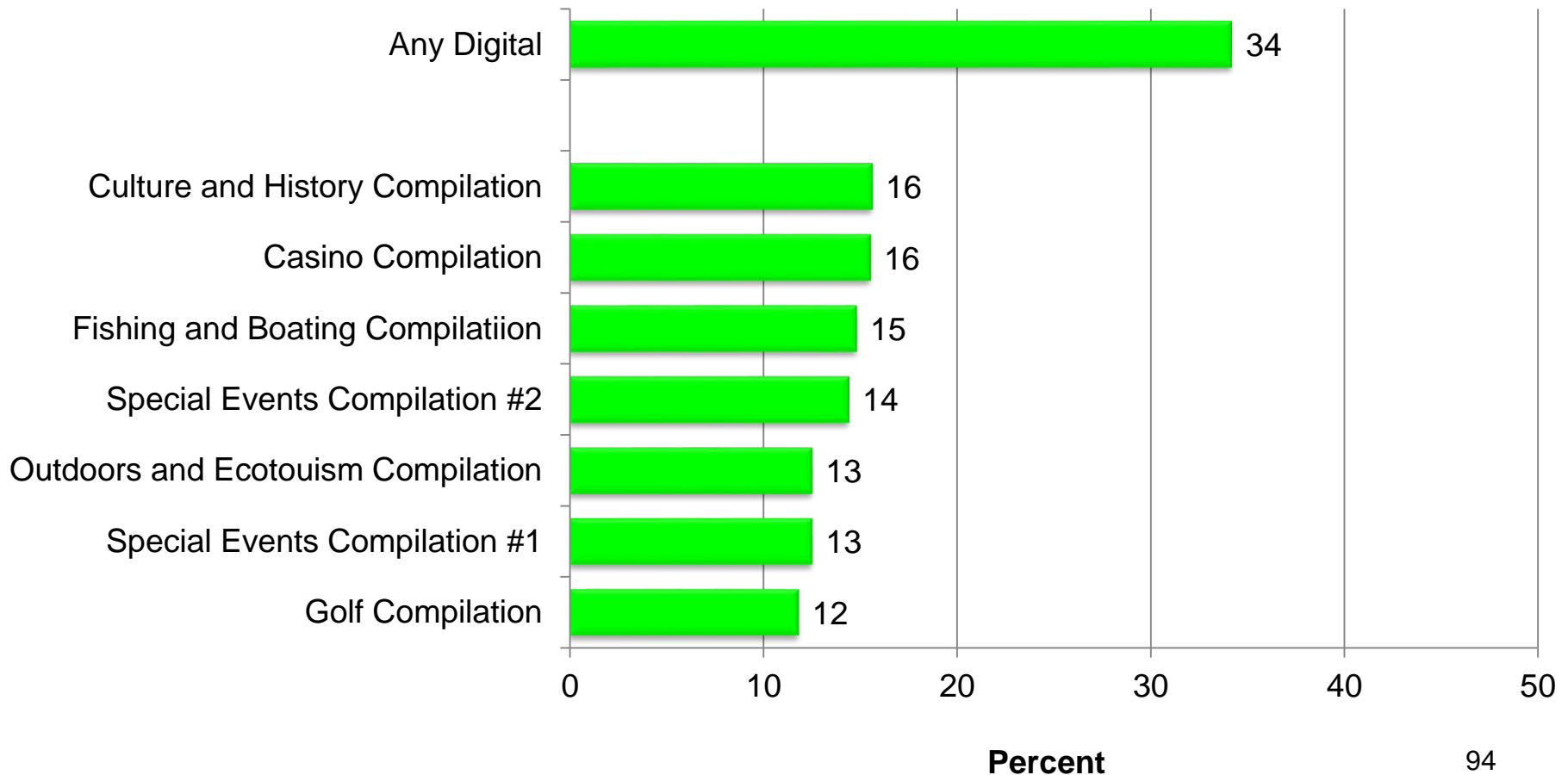
# Awareness of Individual Ads — TV/Web Video

Base: Total Travelers



| Ad | Percent |
|---|---|
| Any TV/Web Video | 33 |
| Couples Long Version | 19 |
| Three Guys Long Version | 18 |
| Casino_RS_V2 | 15 |
| 20766 Casino | 11 |

**Percent**

95
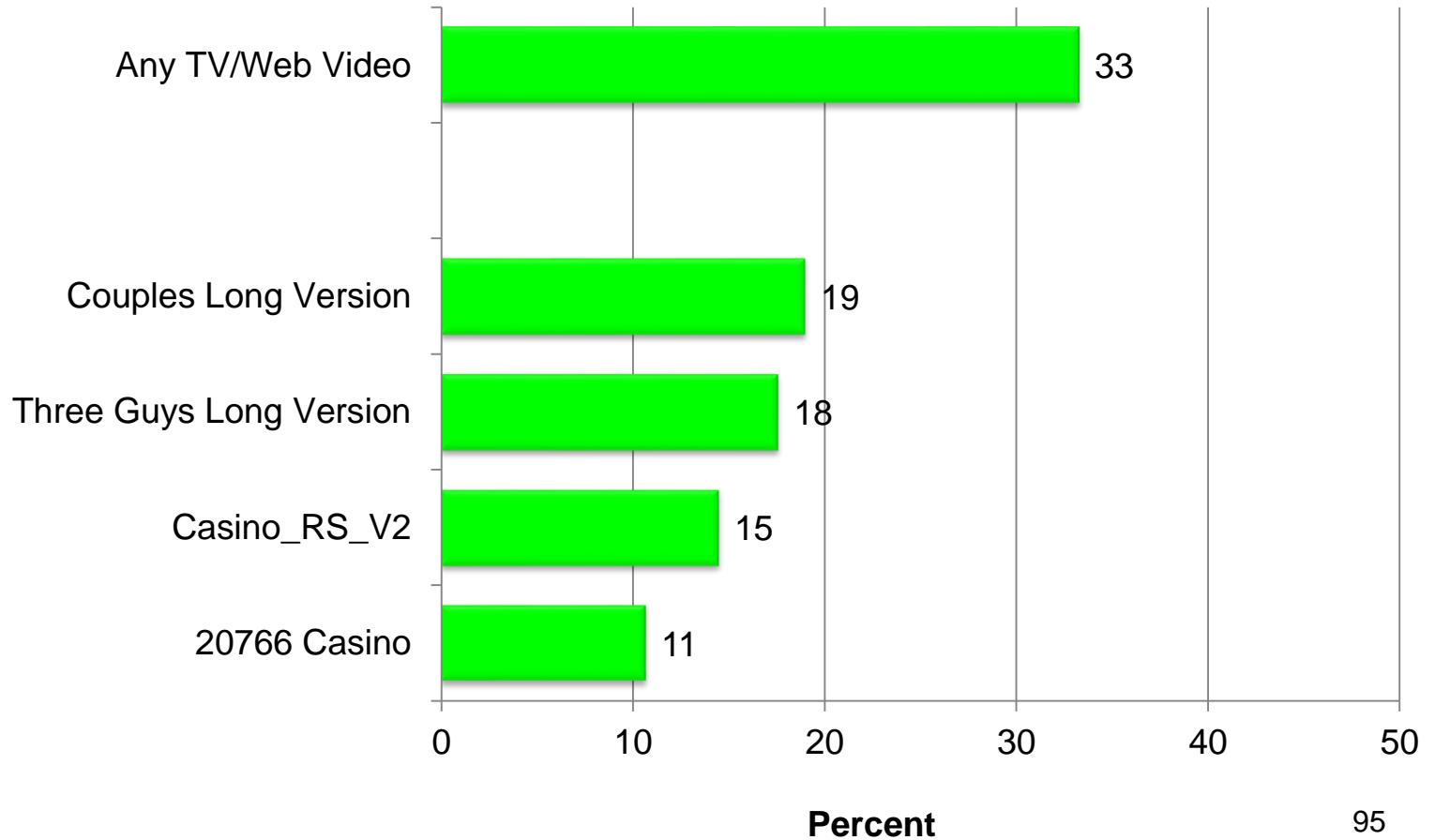
# Relationship of Visitation and Ad Awareness for the Most Recent Visit to the MS Gulf Coast

**Base: Total Travelers**



Bar chart — "Percent Who Strongly Agree" (x-axis: 0 to 80)

| Category | Aware | Unaware |
|---|---|---|
| More than 5 Years Ago | 21 | 35 |
| Visited in the past 5 years | 21 | 19 |
| Visited in the past 2 years | 27 | 18 |
| Visited in the past year | 31 | 28 |

Legend: ■ Aware ■ Unaware
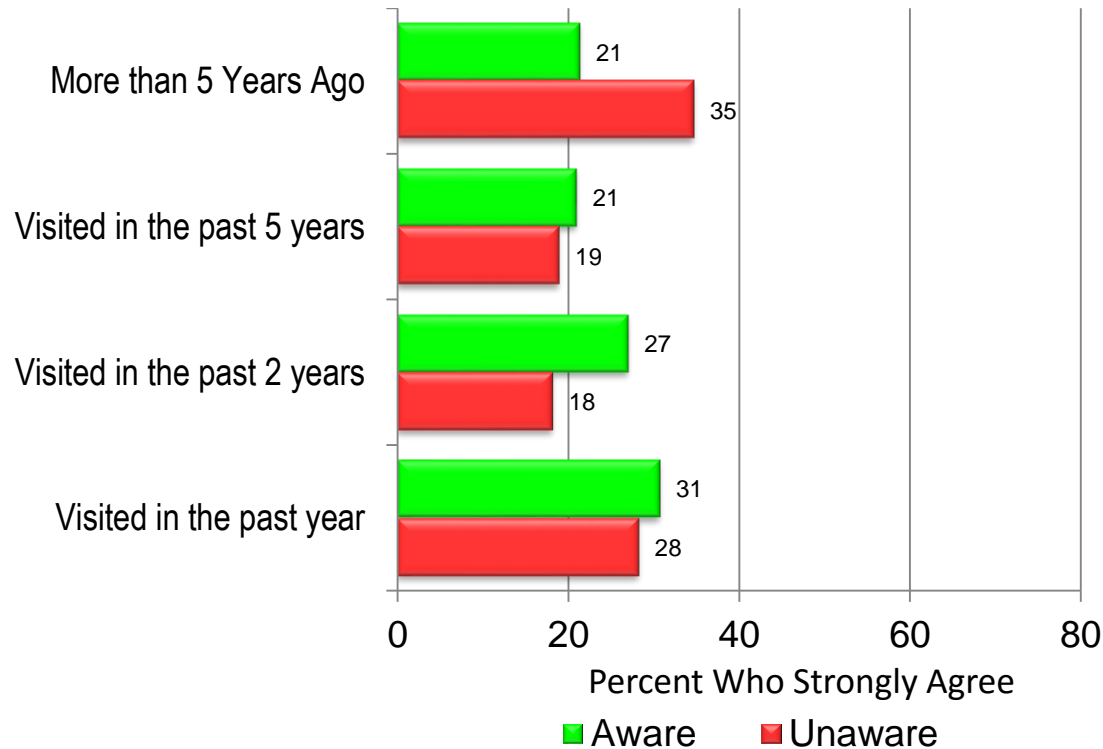
# Impact of the 2015 Advertising Campaign on Mississippi Gulf Coast's Image

# Advertising Image Impacts

- All the image factors were positively impacted by the campaign, the lowest lift being 8% and the highest lift being 17%. These are judged to be good lifts.
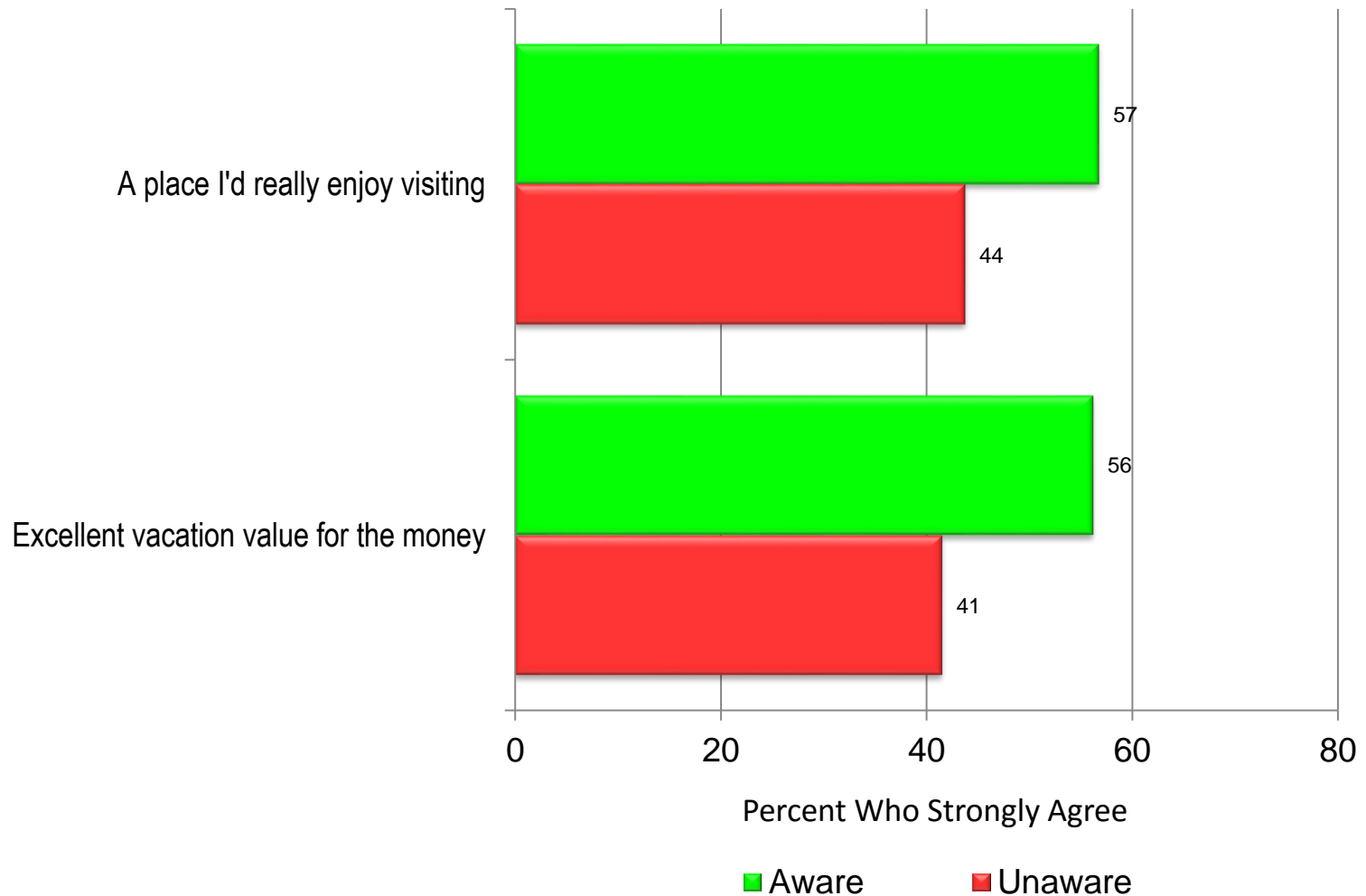
- The individual Hot Buttons most improved by the advertising are:
    - *An exciting place*
    - *Must see destination*
    - *A fun place*
    - *Good for an adult vacation*

# Impact of 2015 Advertising on Mississippi Gulf Coast's Summary Measures

Base: Total Travelers



A place I'd really enjoy visiting
- Aware: 57
- Unaware: 44

Excellent vacation value for the money
- Aware: 56
- Unaware: 41

Percent Who Strongly Agree

■ Aware   ■ Unaware

# Impact of 2015 Advertising
# on Mississippi Gulf Coast's Image

| Category | Aware | Unaware |
|---|---|---|
| Exciting | 55 | 40 |
| Adult Destination | 63 | 53 |
| Luxurious | 51 | 38 |
| Family Atmosphere | 56 | 45 |
| Worry Free | 59 | 49 |
| Sightseeing | 52 | 40 |
| Unique | 53 | 38 |
| Entertainment | 48 | 34 |
| Popular | 54 | 40 |
| Climate | 51 | 34 |
| Affordable | 58 | 49 |
| Sports & Recreation | 50 | 36 |

Percent Who Strongly Agree

■ Aware   ■ Unaware

100
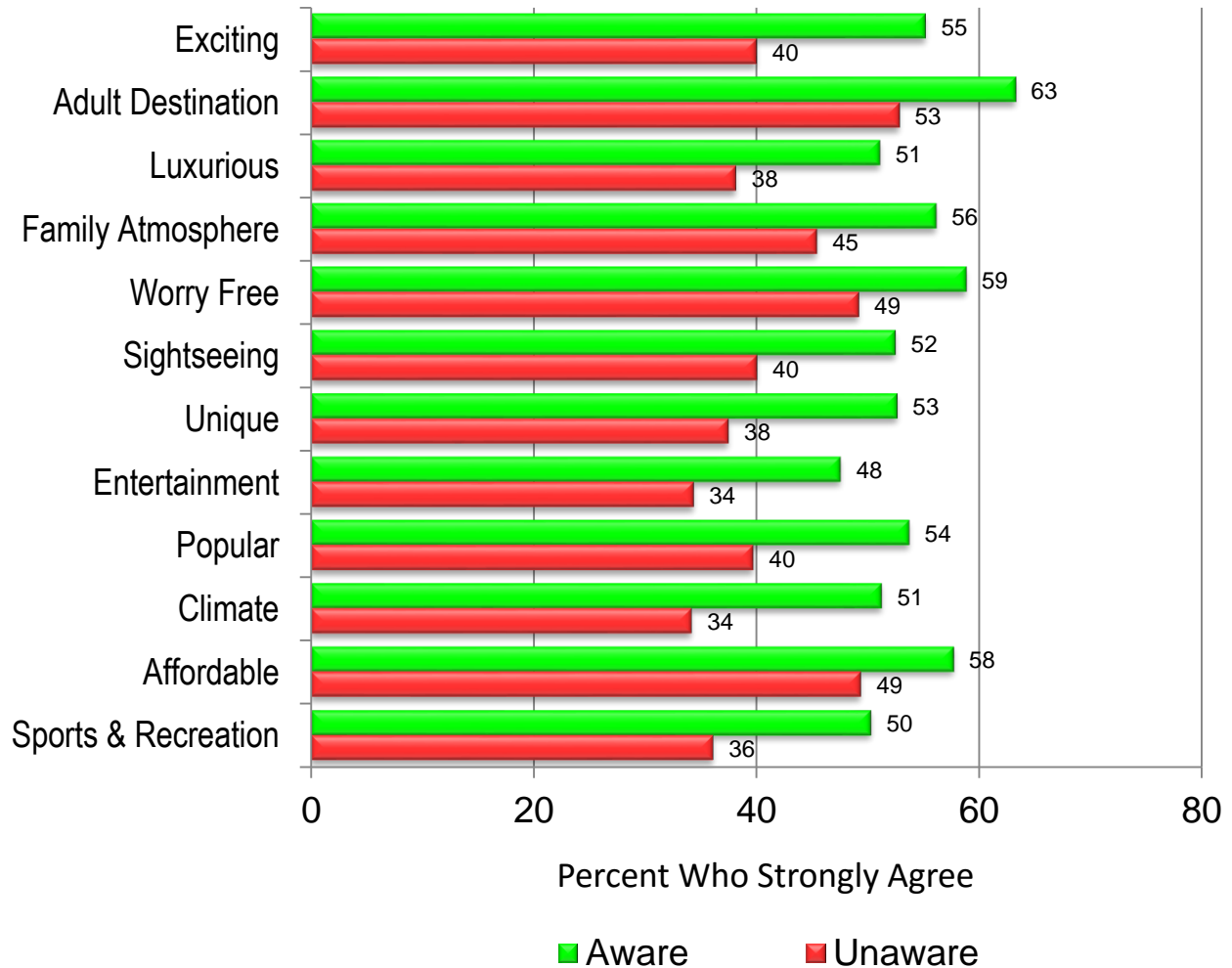
# Mississippi Gulf Coast's Image — Exciting



Base: Total Travelers
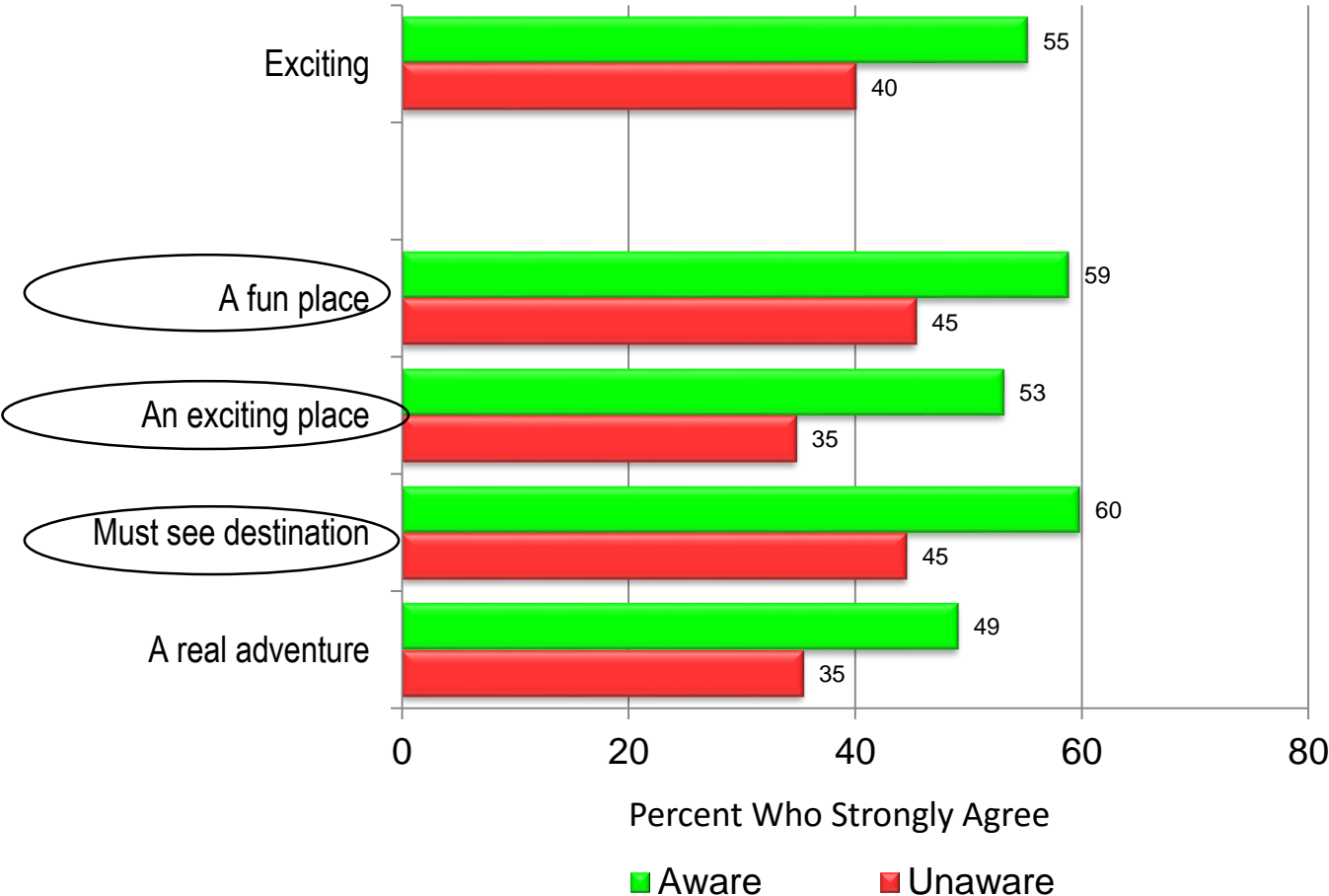
Percent Who Strongly Agree

Aware | Unaware

* Circled attributes are some of the most important image hot buttons for travelers

# Mississippi Gulf Coast's Image — Adult Destination

Base: Total Travelers



Percent Who Strongly Agree

- **Adult Destination** — Aware: 63, Unaware: 53
- **Good for couples** — Aware: 60, Unaware: 52
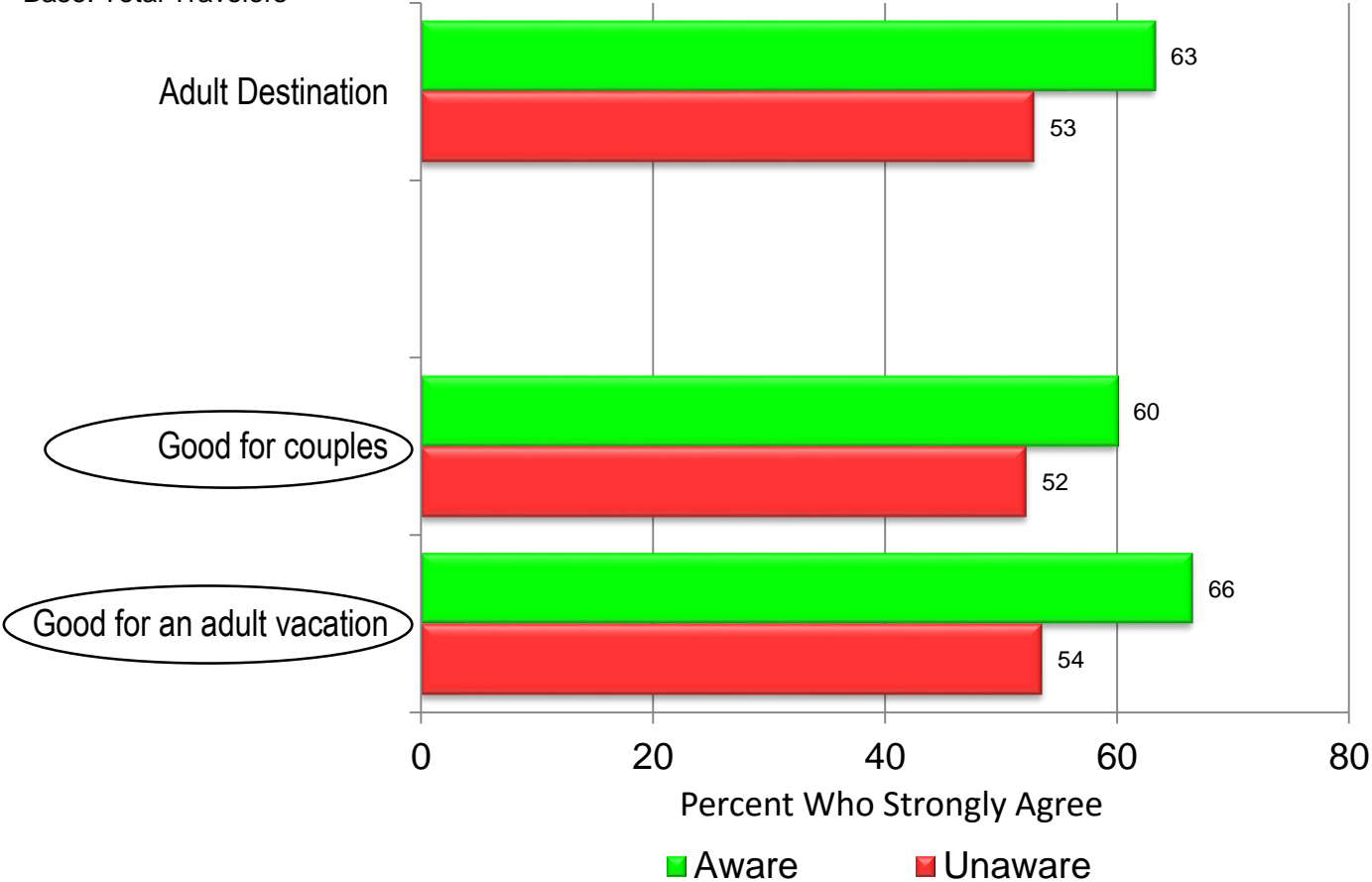- **Good for an adult vacation** — Aware: 66, Unaware: 54

■ Aware   ■ Unaware

* Circled attributes are some of the most important image hot buttons for travelers

102

# Mississippi Gulf Coast's Image — Luxurious

Base: Total Travelers



Percent Who Strongly Agree

■ Aware   ■ Unaware

# Mississippi Gulf Coast's Image — Family Atmosphere

Base: Total Travelers



Percent Who Strongly Agree

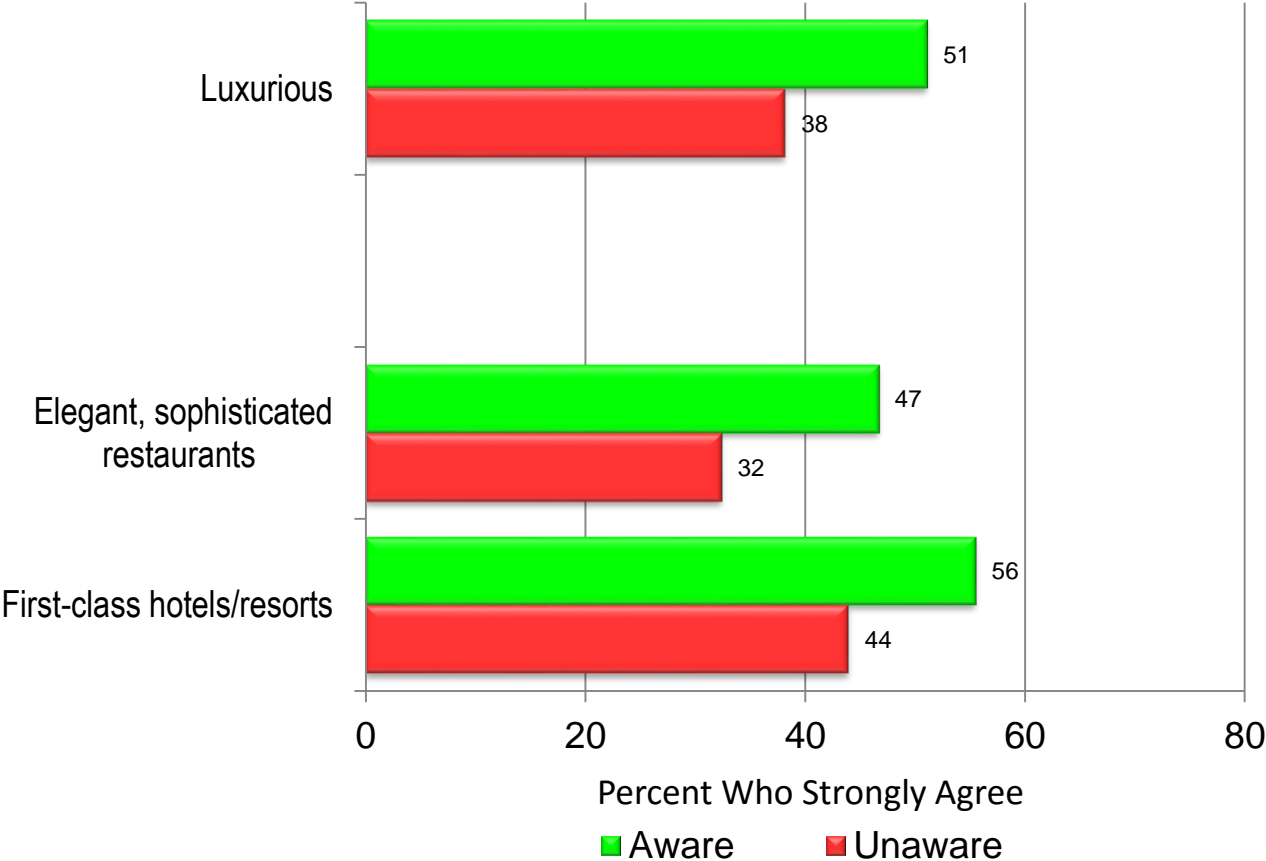| | Aware | Unaware |
|---|---|---|
| Family Atmosphere | 56 | 45 |
| Good place for families to visit | 59 | 50 |
| Children would especially enjoy | 53 | 41 |

■ Aware   ■ Unaware

* Circled attributes are some of the most important image hot buttons for travelers

# Mississippi Gulf Coast's Image — Worry Free

Base: Total Travelers



Percent Who Strongly Agree

| Attribute | Aware | Unaware |
|---|---|---|
| Worry Free | 59 | 49 |
| A place where I would feel comfortable | 61 | 50 |
| A place I would feel welcome | 60 | 49 |
| Good place to relax | 61 | 50 |
| Warm, friendly people | 61 | 51 |
| Offers a variety of dining options | 54 | 48 |
| Safe place to travel | 59 | 55 |
| Right distance for a weekend getaway | 57 | 41 |

■ Aware   ■ Unaware

* Circled attributes are some of the most important image hot buttons for travelers
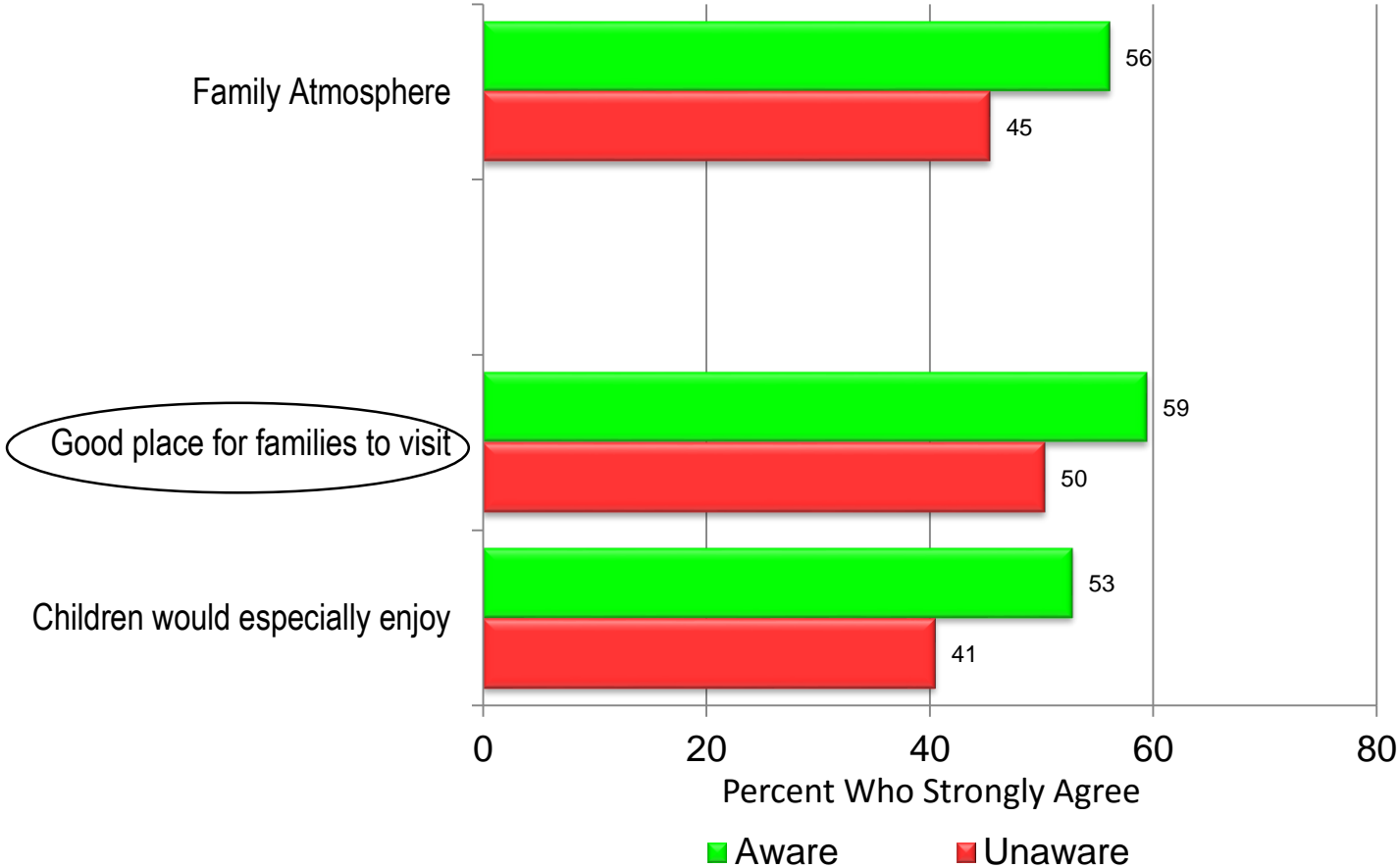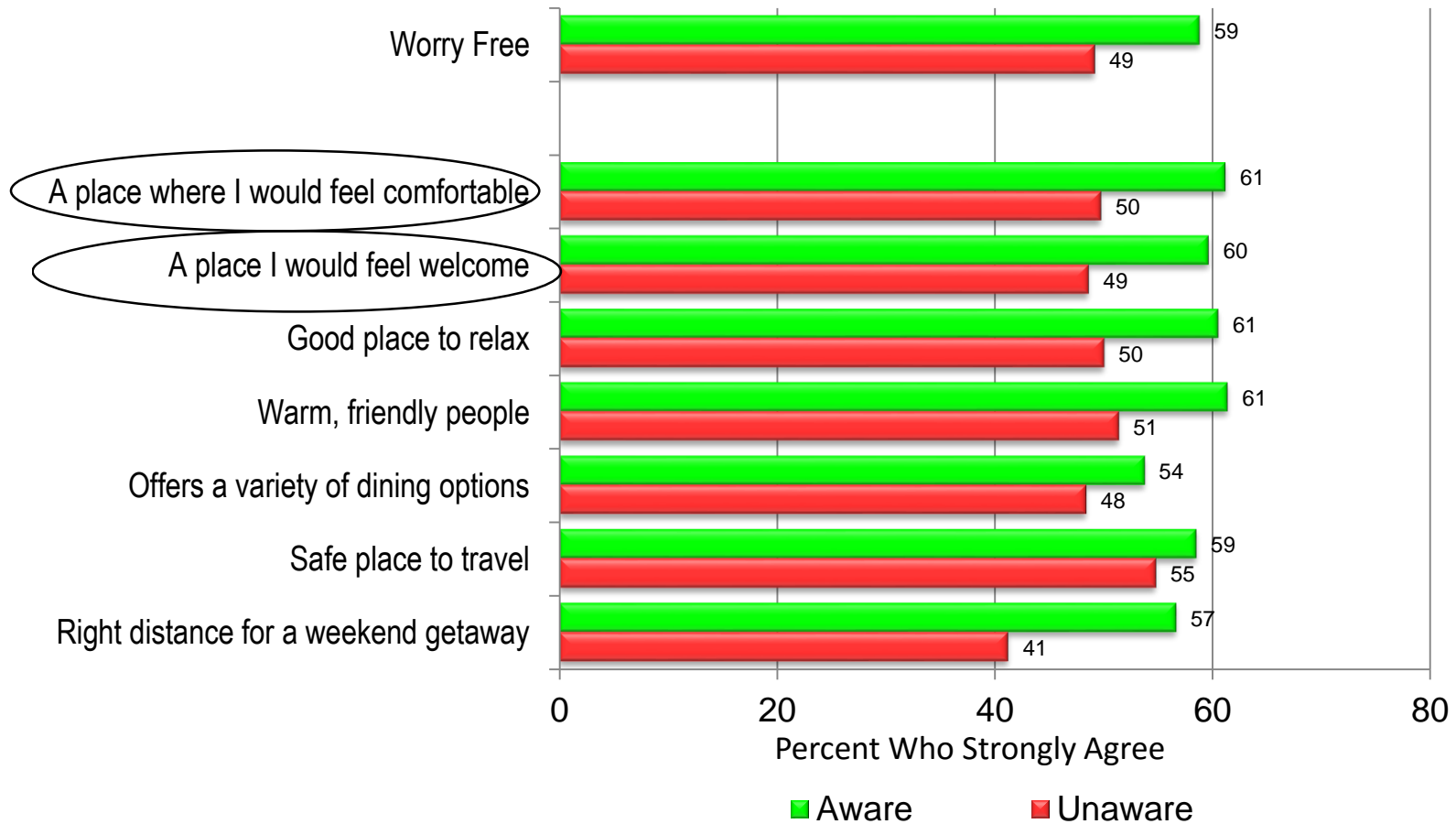
# Mississippi Gulf Coast's Image — Sightseeing
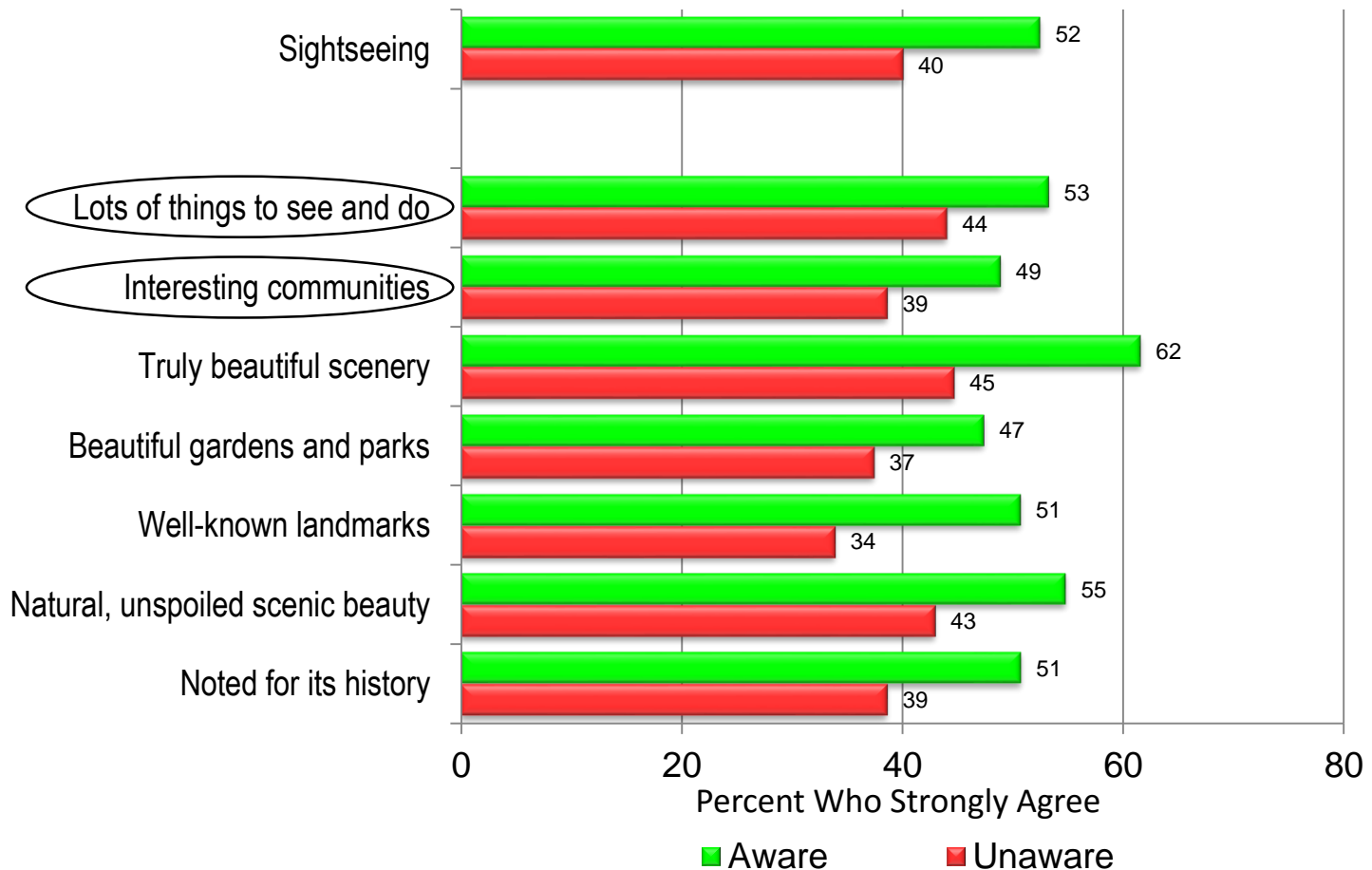
Percent Who Strongly Agree

■ Aware   ■ Unaware

106
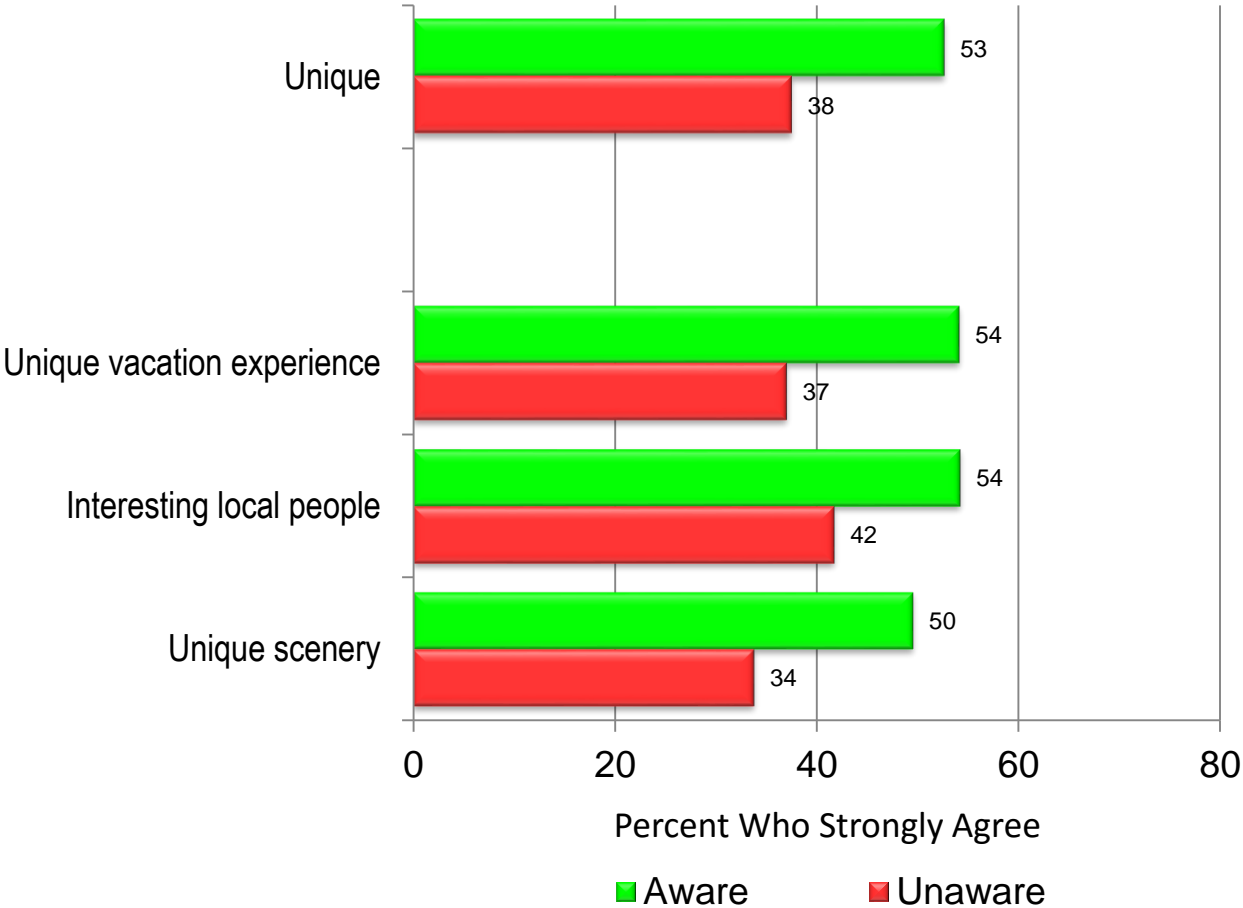
* Circled attributes are some of the most important image hot buttons for travelers

# Mississippi Gulf Coast's Image — Unique

Base: Total Travelers



Percent Who Strongly Agree

| | Aware | Unaware |
|---|---|---|
| Unique | 53 | 38 |
| Unique vacation experience | 54 | 37 |
| Interesting local people | 54 | 42 |
| Unique scenery | 50 | 34 |

■ Aware  ■ Unaware

107

# Mississippi Gulf Coast's Image — Entertainment

Base: Total Travelers



| | Aware | Unaware |
|---|---|---|
| Entertainment | 48 | 34 |
| Interesting festivals/fairs/events | 52 | 37 |
| Excellent shopping | 48 | 32 |
| Exciting nightlife/entertainment/shows | 54 | 38 |
| Great live music | 49 | 39 |
| Great for theater/arts/museums | 36 | 25 |

Percent Who Strongly Agree

■ Aware   ■ Unaware
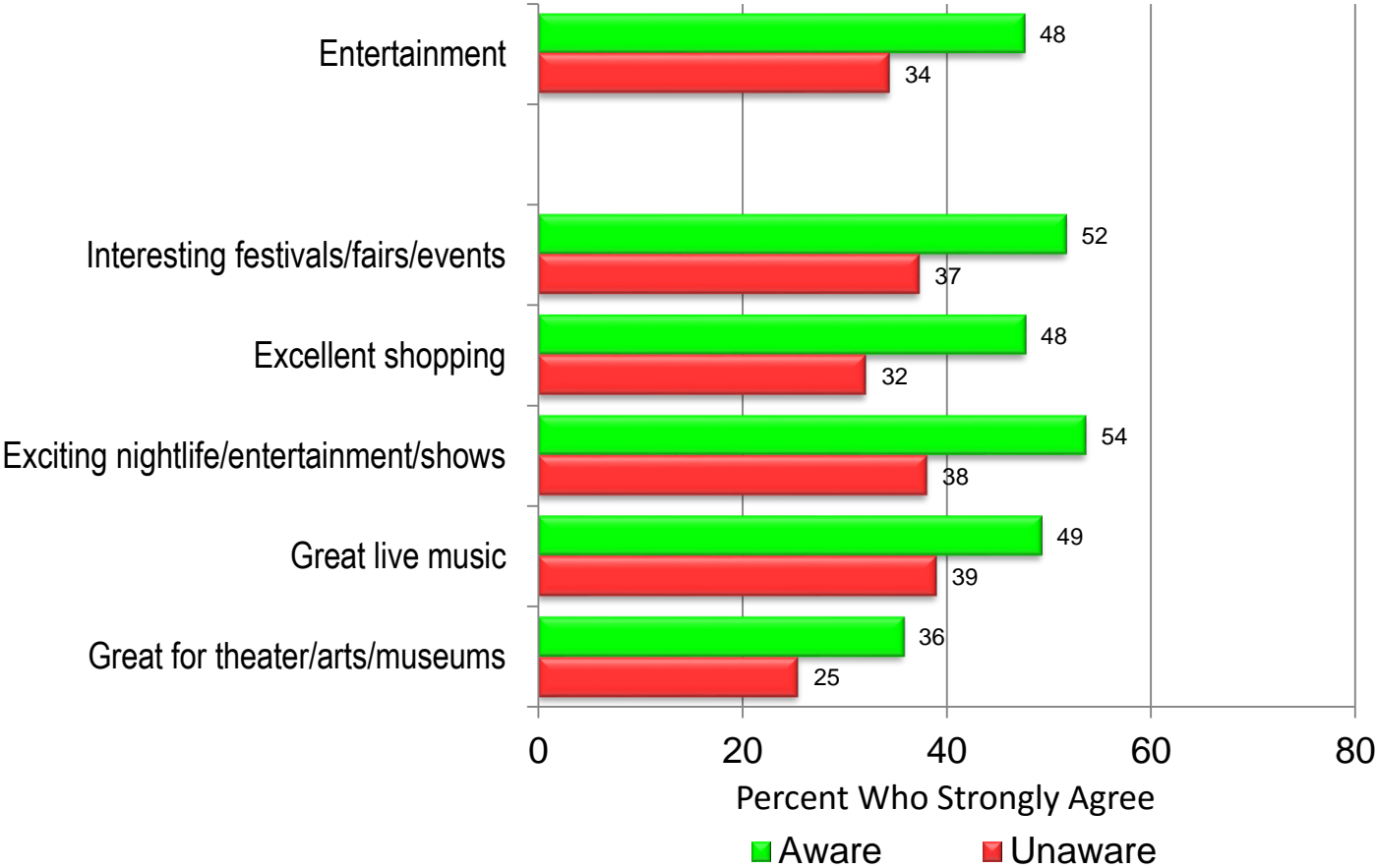
# Mississippi Gulf Coast's Image — Popular

Base: Total Travelers
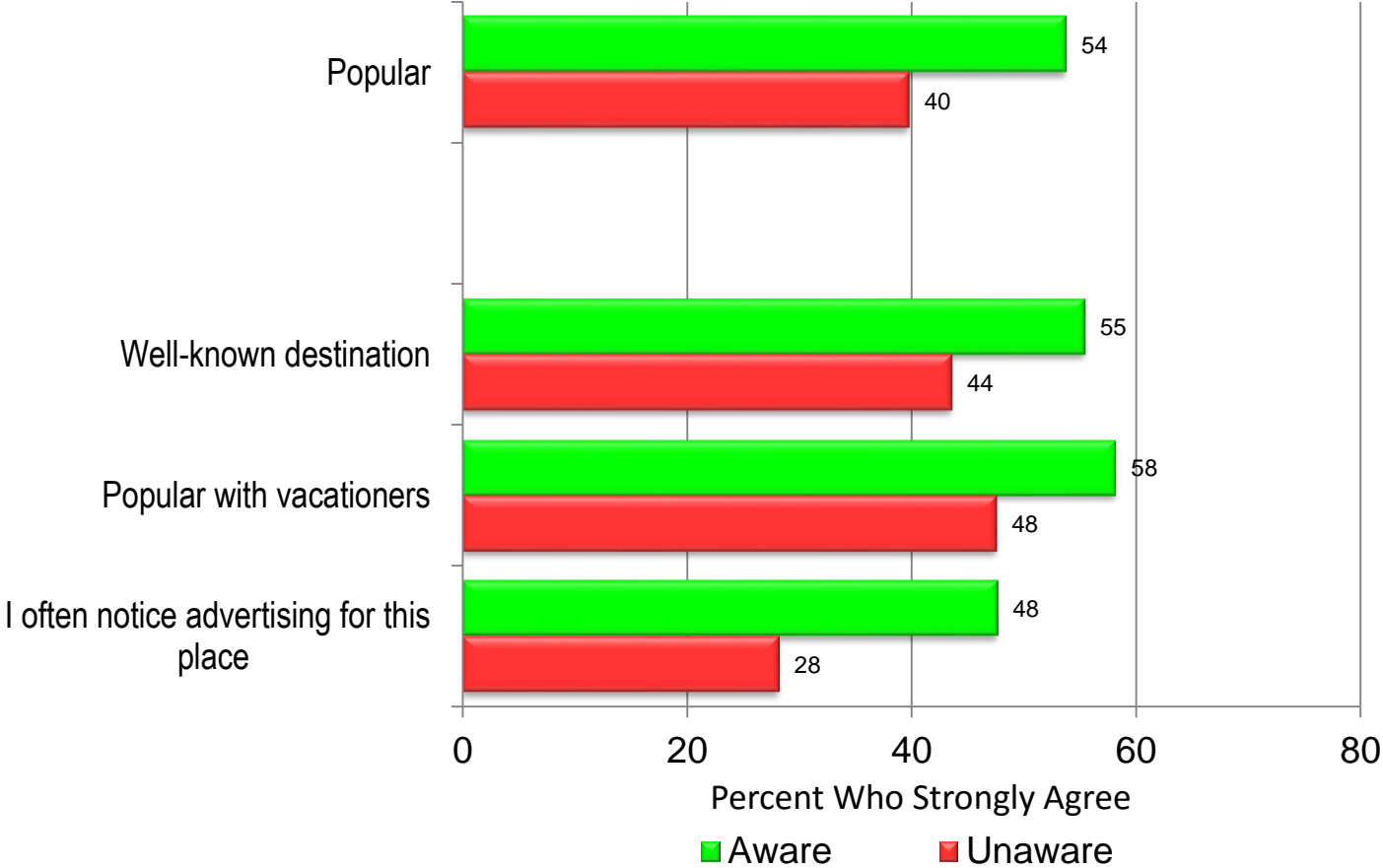


Percent Who Strongly Agree

- Popular: Aware 54, Unaware 40
- Well-known destination: Aware 55, Unaware 44
- Popular with vacationers: Aware 58, Unaware 48
- I often notice advertising for this place: Aware 48, Unaware 28

■ Aware    ■ Unaware

# Mississippi Gulf Coast's Image — Climate

Base: Total Travelers
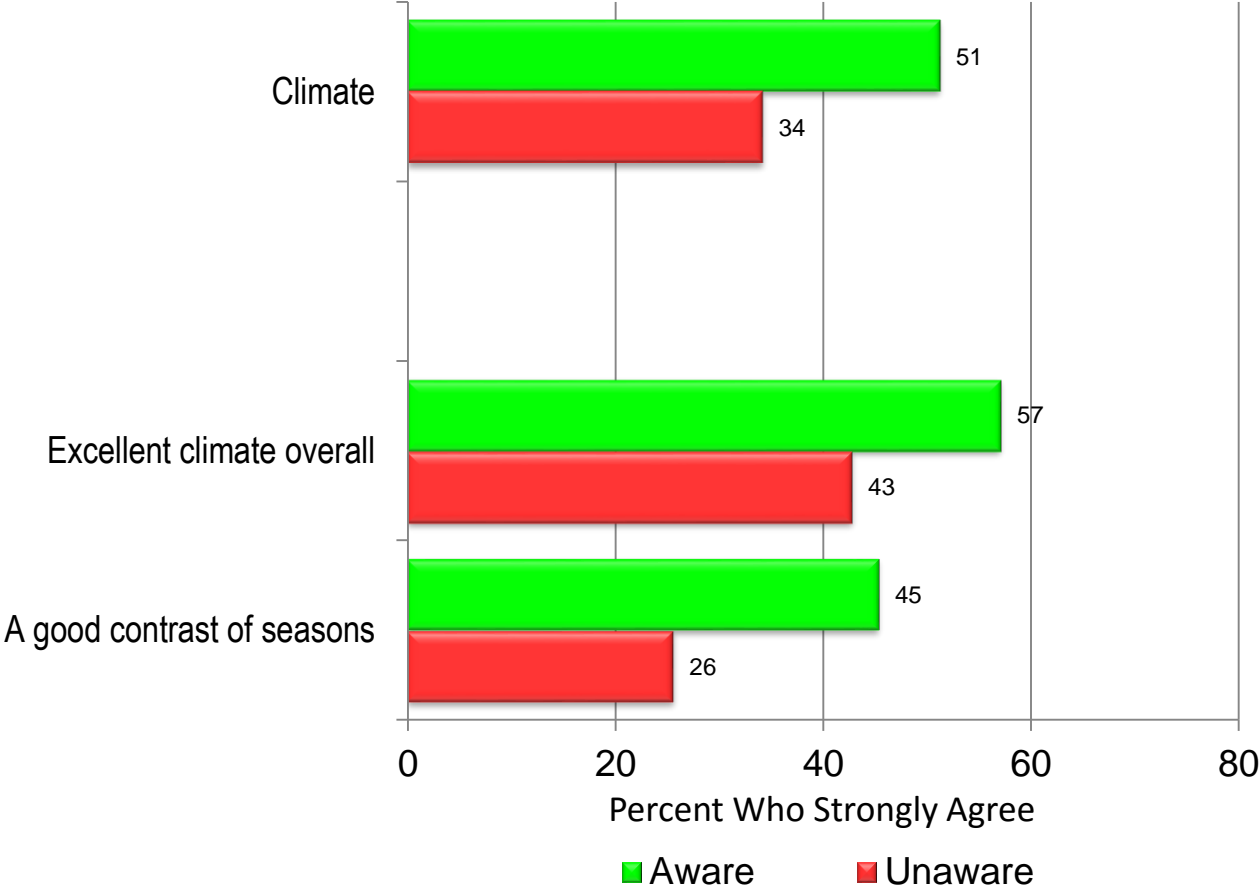


Percent Who Strongly Agree

■ Aware   ■ Unaware

# Mississippi Gulf Coast's Image — Affordable

Base: Total Travelers



**Percent Who Strongly Agree**

| Category | Aware | Unaware |
|---|---|---|
| Affordable | 58 | 49 |
| Affordable accommodations | 54 | 43 |
| Not too far away to consider for a vacation | 62 | 58 |
| Affordable to eat there | 56 | 45 |
| Affordable to get to | 59 | 51 |

■ Aware  ■ Unaware
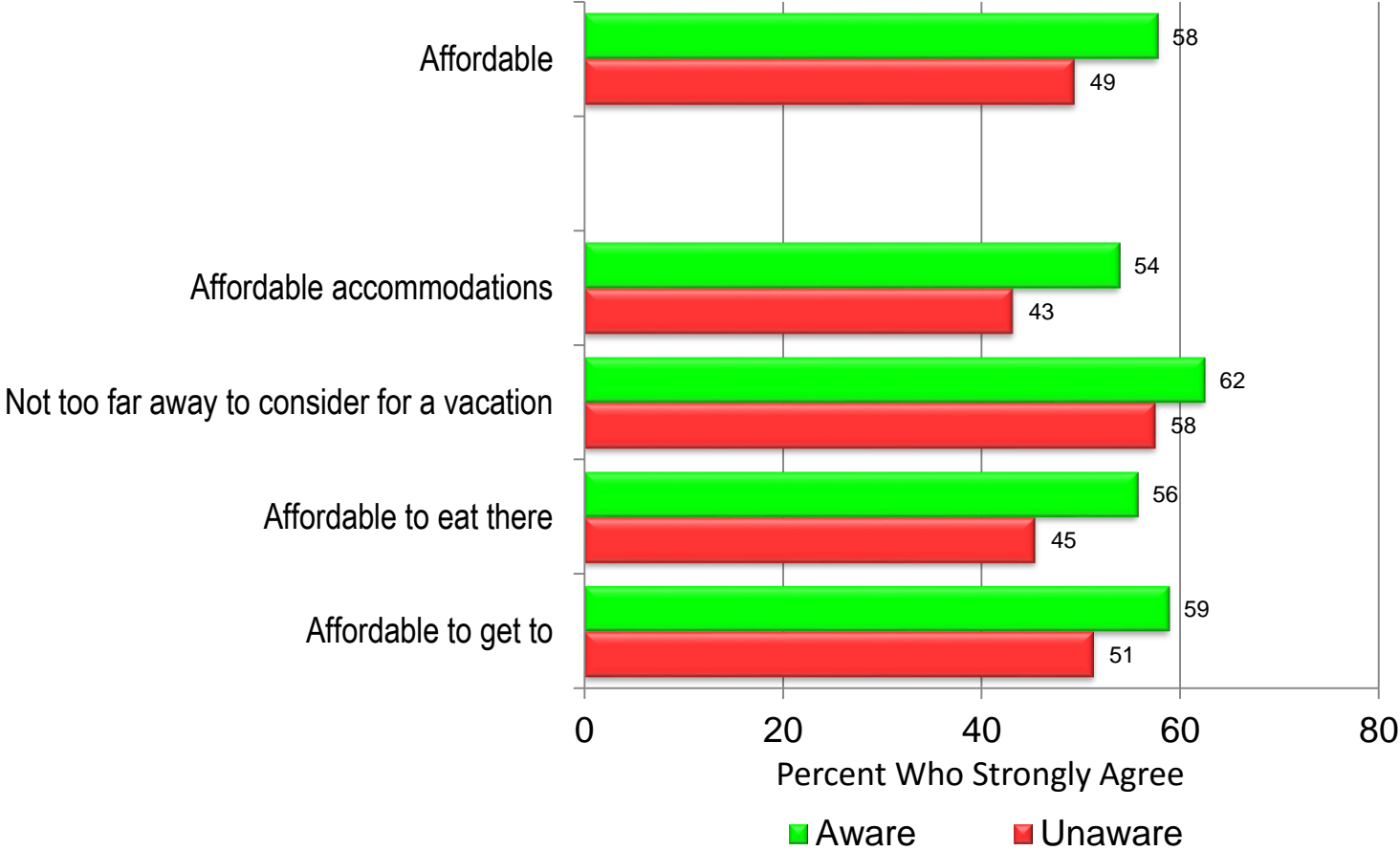
# Mississippi Gulf Coast's Image — Sports & Recreation

Base: Total Travelers



| Category | Aware | Unaware |
|---|---|---|
| Sports & Recreation | 50 | 36 |
| Excellent state park facilities | 51 | 38 |
| Great for exploring nature | 53 | 42 |
| Great for outdoor adventure sports | 55 | 38 |
| Great for motorcycle touring | 51 | 29 |
| Excellent fishing | 64 | 54 |
| Good for viewing wildlife/birds | 54 | 48 |
| Good trail system | 44 | 28 |
| Great for golfers | 50 | 36 |
| Great spectator sports venues | 41 | 24 |
| Great for professional/college sports | 41 | 24 |

Percent Who Strongly Agree

■ Aware  ■ Unaware

112

# Attributes for Which the Campaign Had the Greatest Impact

Base: Total Travelers

| Attribute | Difference in Percent Who Strongly Agree |
|---|---|
| Great for motorcycle touring | 22 |
| A good contrast of seasons | 20 |
| I often notice advertising for this place | 19 |
| An exciting place | 18 |
| Unique vacation experience | 17 |
| Great for professional/college sports | 17 |
| Truly beautiful scenery | 17 |
| Well-known landmarks | 17 |
| Great for outdoor adventure sports | 16 |
| Great spectator sports venues | 16 |
| Unique scenery | 16 |
| Good trail system | 16 |
| Excellent shopping | 16 |
| Exciting nightlife/entertainment/shows | 16 |
| Right distance for a weekend getaway | 15 |

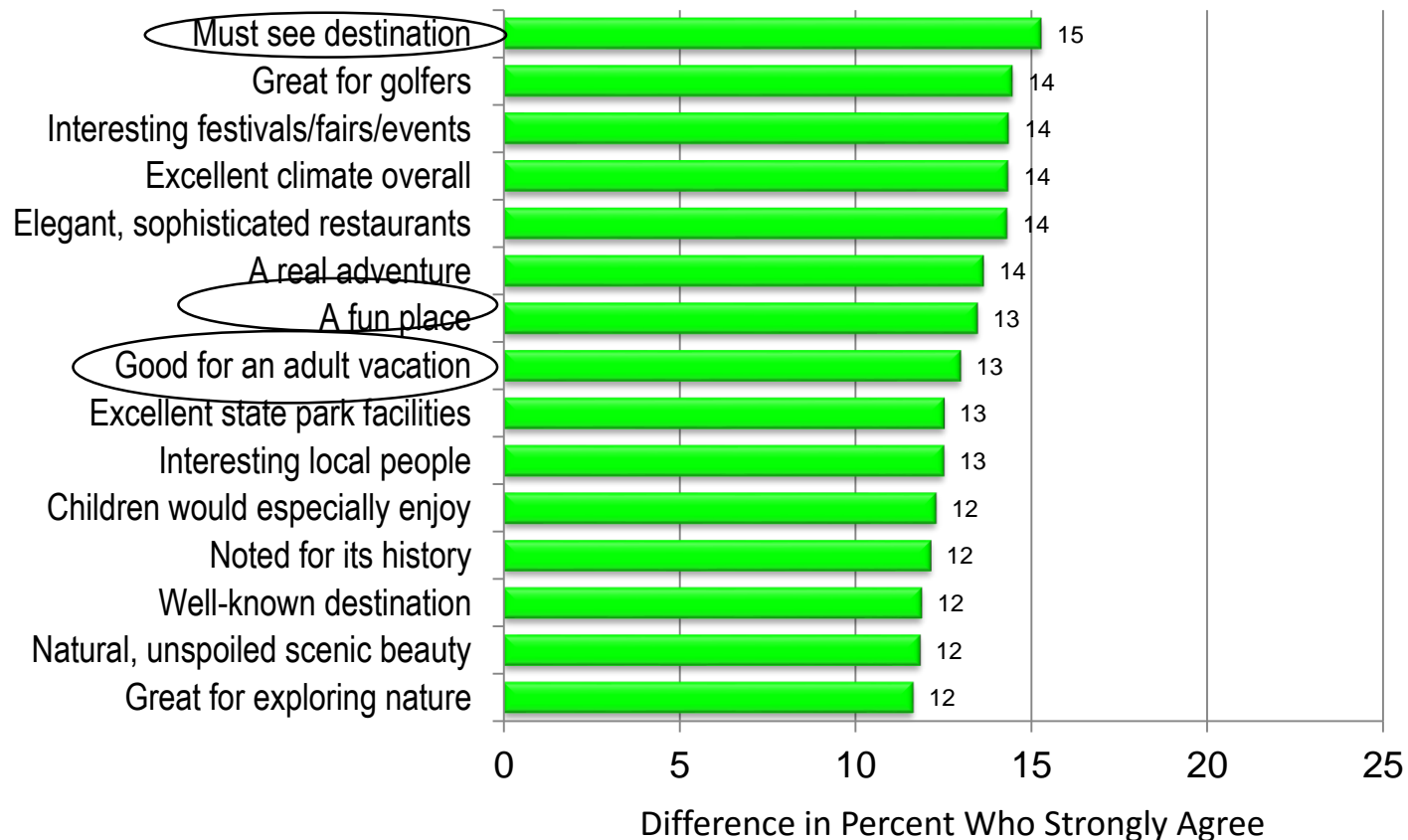Difference in Percent Who Strongly Agree

\* Circled attributes are some of the most important image hot buttons for travelers

# Attributes for Which the Campaign Had the Greatest Impact – Cont'd

Base: Total Travelers

| Attribute | Difference in Percent Who Strongly Agree |
|---|---|
| Must see destination | 15 |
| Great for golfers | 14 |
| Interesting festivals/fairs/events | 14 |
| Excellent climate overall | 14 |
| Elegant, sophisticated restaurants | 14 |
| A real adventure | 14 |
| A fun place | 13 |
| Good for an adult vacation | 13 |
| Excellent state park facilities | 13 |
| Interesting local people | 13 |
| Children would especially enjoy | 12 |
| Noted for its history | 12 |
| Well-known destination | 12 |
| Natural, unspoiled scenic beauty | 12 |
| Great for exploring nature | 12 |

Difference in Percent Who Strongly Agree

\* Circled attributes are some of the most important image hot buttons for travelers

114

# Short-Term Impacts of the Advertising

# Advertising Impacts

- ***Please note: this study was originally designed as an Image and Awareness study. We have adapted the study to provide these impacts but there are differences from the methodology typically used in a Longwoods ROI study.***

- Based on this adapted methodology, we estimate that the investment of $760,310 million dollars generated in the short term:

  - *254,654 new visitors to the Mississippi Gulf Coast who would not otherwise have come*

  - *These incremental visitors spent approximately $33\* million in the Mississippi Gulf Coast*

  - *The incremental spending resulted in $1.2 million in incremental local taxes\*\* or a return on investment of 2:1*

\*Based on Avg. Spending estimates from 2014 Longwoods Travel USA® of $129 per person
\*\*Based on tax rates from the State of Mississippi (3.8% total local taxes)

# Advertising Impacts

- In addition to the short term impacts, we estimate that the advertising has influenced the planning of a further 484,937 trips to the Mississippi Gulf Coast in 2016.

- While not all of these planned trips will happen, we expect that a significant percentage will convert (between 5% and 15%, based on our experience across numerous DMO campaigns), adding significantly to the return on the Mississippi Gulf Coast's investment in Tourism Marketing.

# Short-Term Impacts of The Advertising (Adapted Methodology)

| | 2015 |
|---|---|
| | **Total** |
| Ad Investment | $760,310 |
| Incremental Visits | 254,654 |
| Incremental Spending | $32.8 M |
| Local Taxes | $1.2 M |
| **Spending ROI*** | **$43** |
| **Local Tax ROI**** | **$2** |

*Based on Avg. Spending estimates from 2014 Longwoods Travel USA® of $129 per person
**Based on tax rates from the State of Mississippi (3.8% total local taxes)

# Short-Term Impacts Summary (Adapted Methodology)

|  | 2015 |
|---|---|
| Advertising Investment | $760,310 |
| Incremental Spending | $32.8 M |
| Incremental Taxes | $1.2 M |
| **Local Tax ROI** | **$2** |

# Campaign Efficiency (Adapted Methodology)

|  | 2015 |
|---|---|
| Incremental Visits | 254,654 |
| Ad Investment | $760,310 |
| **Ad $'s per Trip** | **$2.98** |
| **Trips per Ad $** | **.33** |

# Longer-Term Impact of Advertising — Intent to Visit Mississippi Gulf Coast (Adapted Methodology)

|  | Intend to Visit MS Gulf Coast in Next 12 Months |
|---|---|
| Overnight | 266,146 |
| Day | 218,791 |
| **Total Intenders** | **484,937** |

# Appendix:
## Media Diagnostics

# Definition of Awareness Example Slide
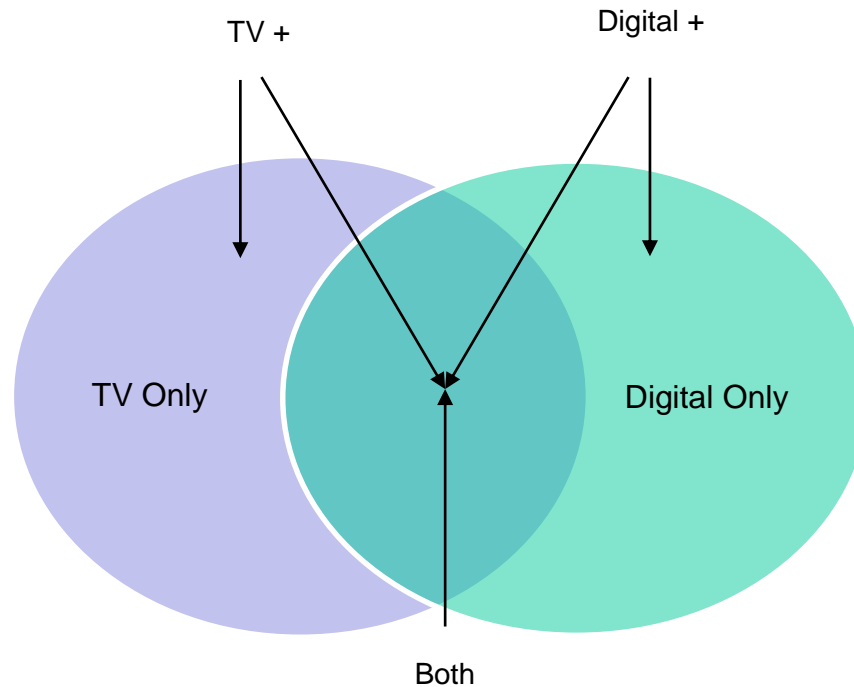
# Total Impressions by Media

**Media Spend:**
Digital          $400.2K
TV/Web Video  $360.1K



Millions of Impressions

| | |
|---|---|
| Digital | 6.2 |
| TV/ Web Video | 33.6 |
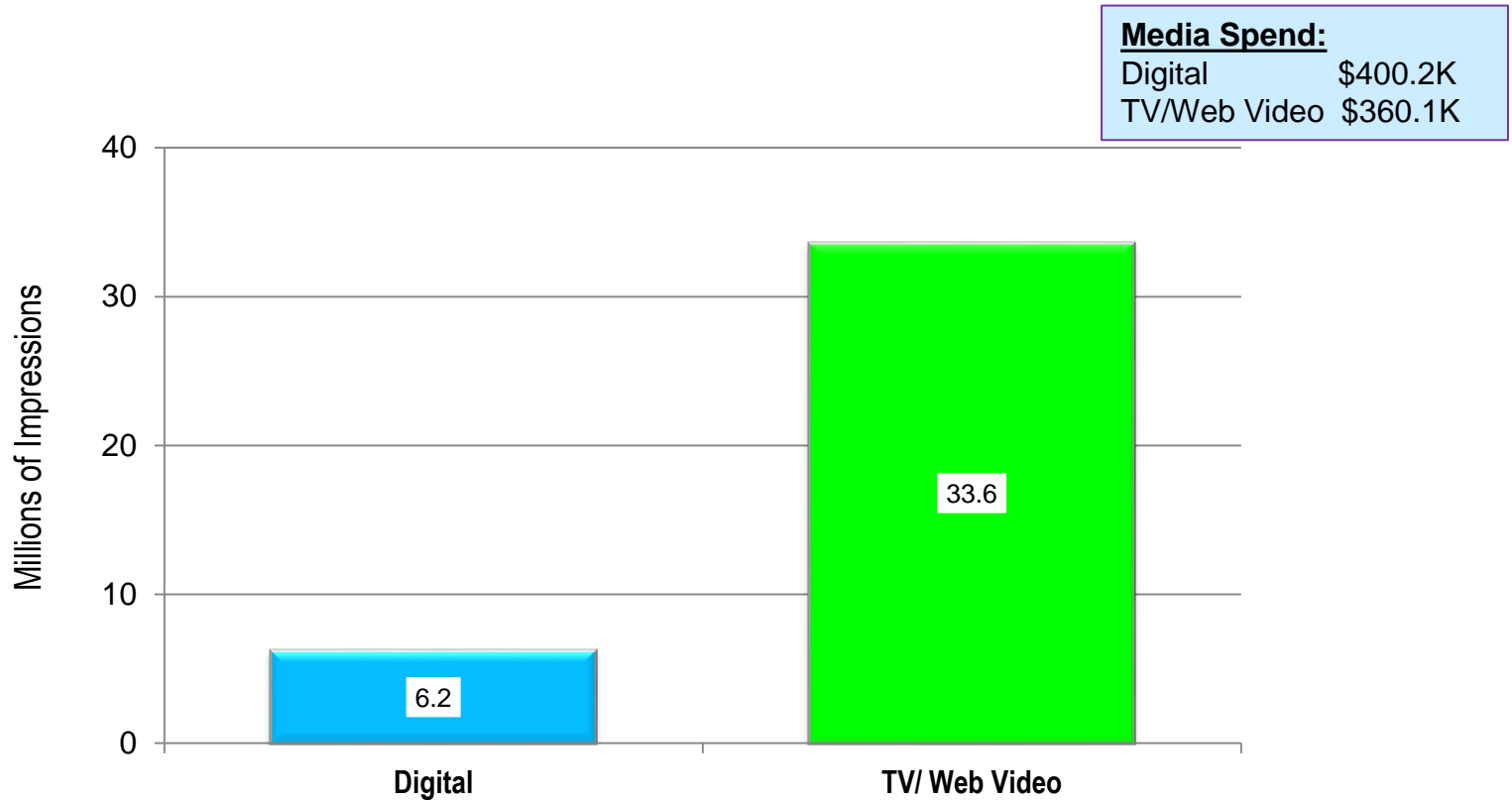
# Impact on Visitation in Past Year by Number of Media Channels

Base: Total Travelers



| | Total | Aware | Unaware | 1 Channel | 2 Channels |
|---|---|---|---|---|---|
| Visitation Percent | 16 | 19 | 15 | 16 | 21 |
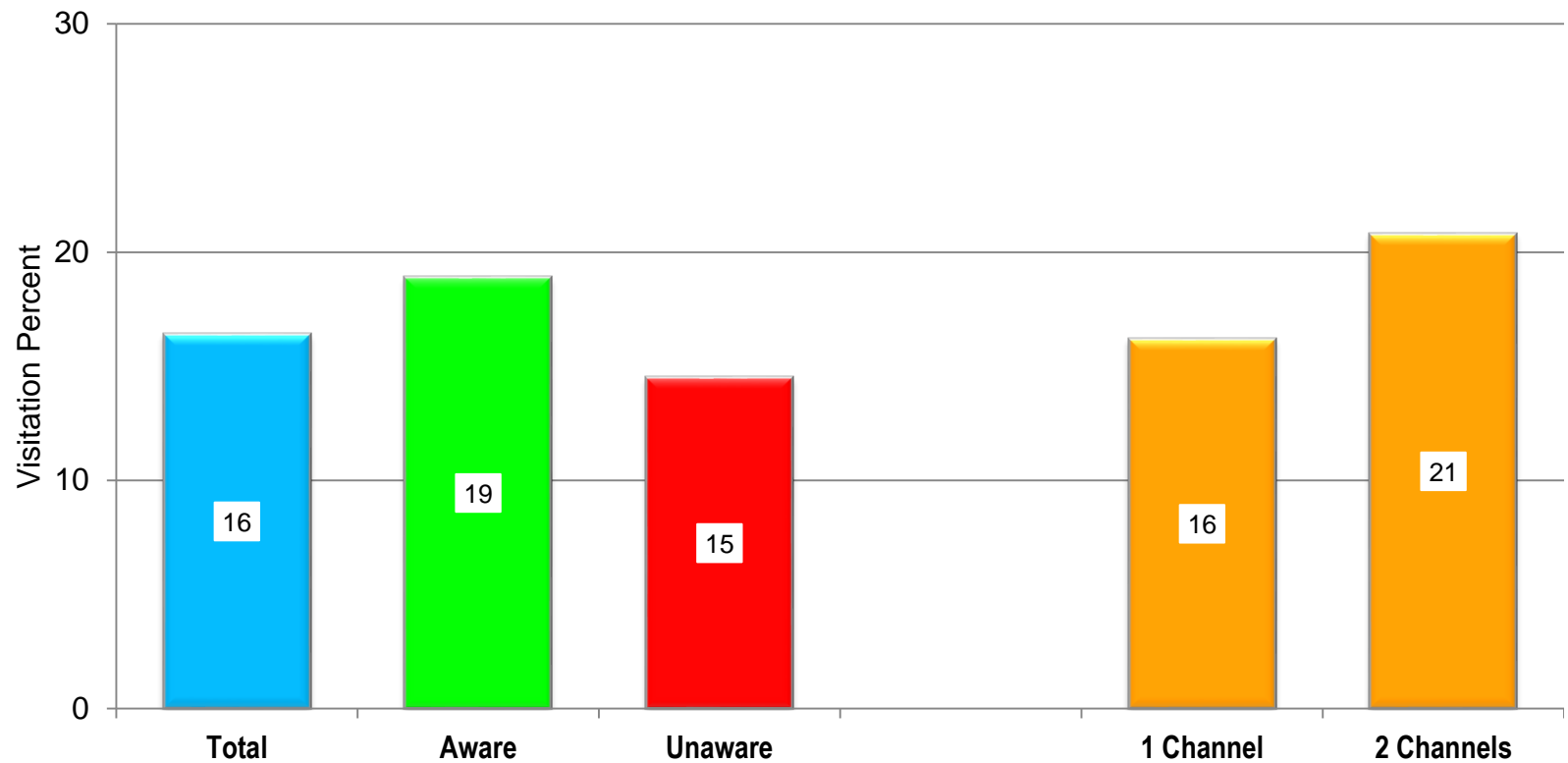
# Appendix:
# Impact of Ads on Trip Planning

# After Seeing the Ads - Information Sources Used for Planning - Summary



48% used none of these

Percent
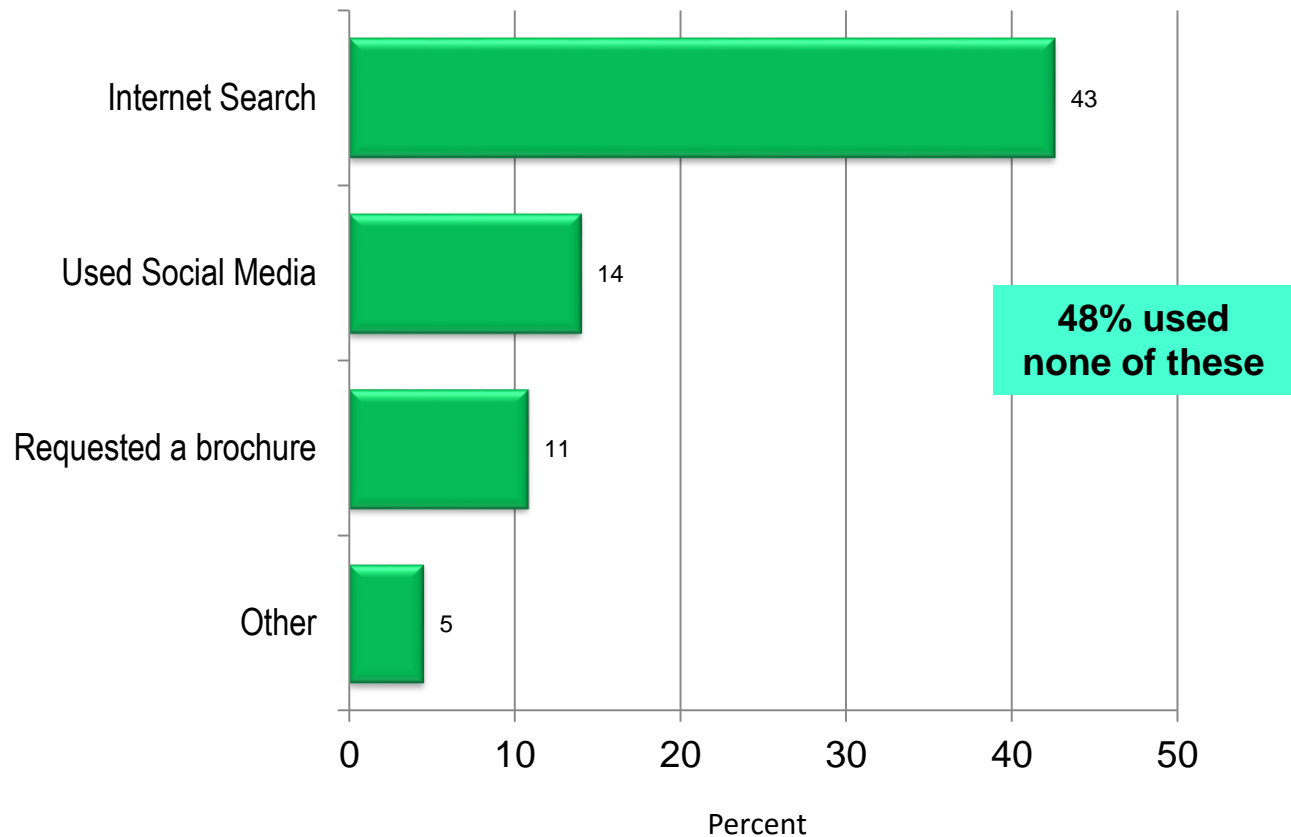
# Appendix:
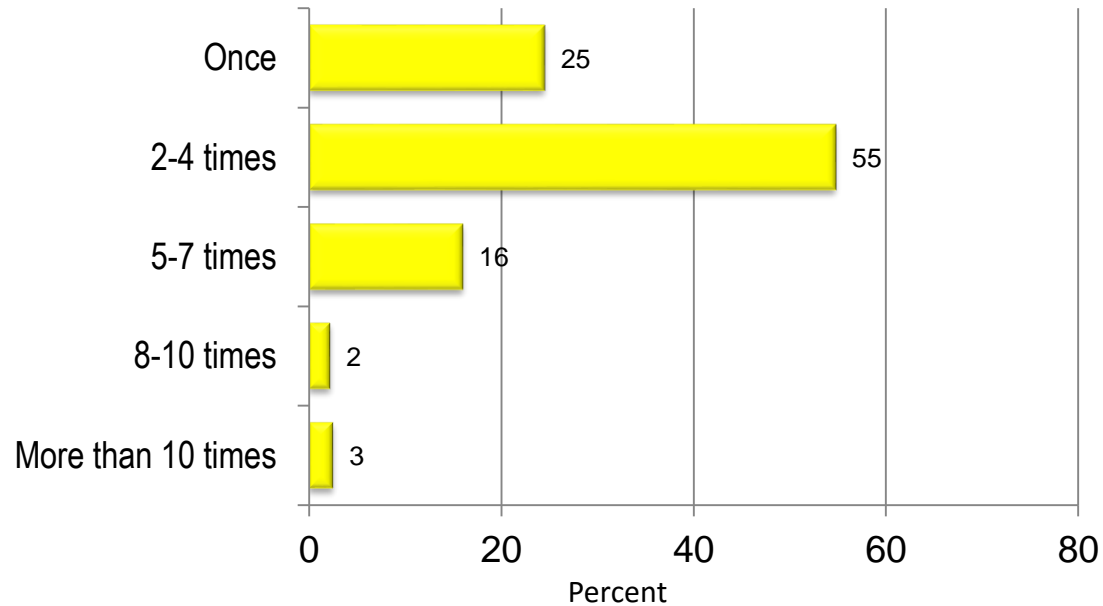## Website Review

# Visited www.gulfcoast.org



19%

81%

■ Yes  ■ No
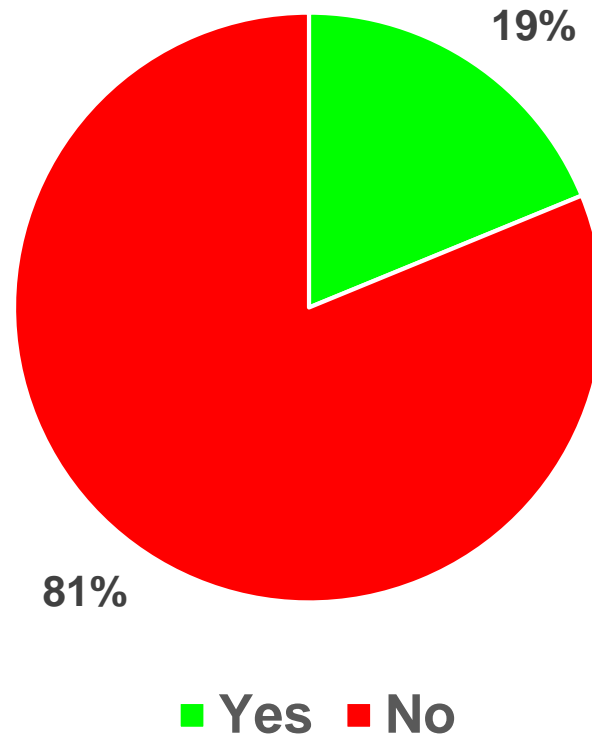
# How many times did you visit www.gulfcoast.org in 2015?

**Base: Those who visited www.gulfcoast.org**

# Appendix:
# Economic Development
# Image Ratings

# Economic Development Image Ratings

- And while it has been suspected that tourism advertising and visitation has a role in every aspect of economic development, what has been missing is data quantifying that impact.   Longwoods International undertook new research to unlock the relationship between tourism advertising and visitation on a destination's image for all other economic development objectives.  The results of that research are in and groundbreaking.

- Longwoods research showed in every case, tourism advertising by a destination and subsequent visitation to that destination significantly improved the image of the destination not just as a place to visit, but also for a wide range of other economic development objectives.
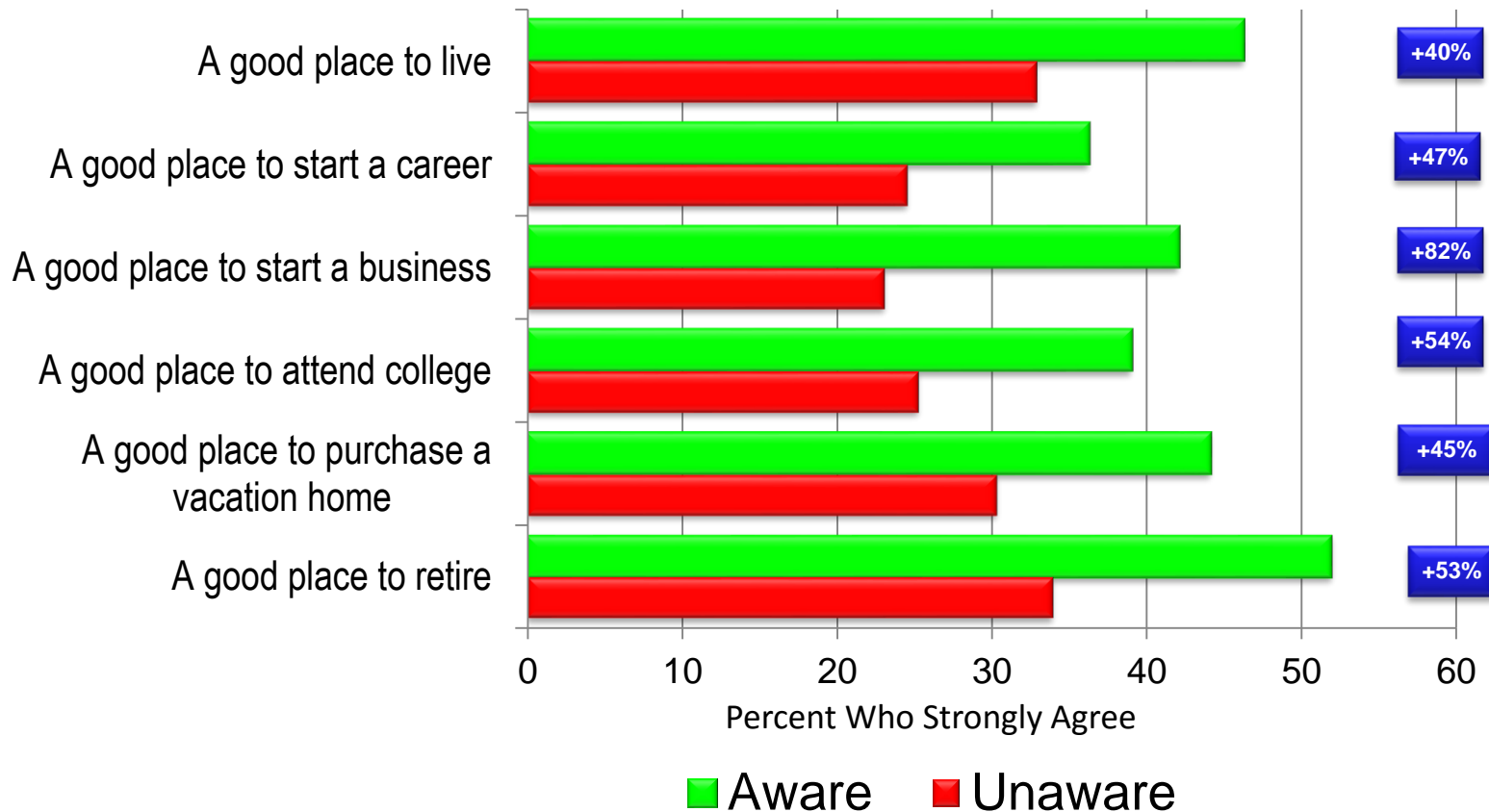
# Economic Development Image Ratings – Cont'd

⊙ It is not different for the Mississippi Gulf Coast. For each of the six image ratings, the Mississippi Gulf Coast's score increases with advertising awareness and visitation. The combination of the two also provides a sizeable lift, especially for the image attribute of "a good place to start a business."

# Impact of Mississippi Gulf Coast 2015 Tourism Campaign on Region's Economic Development Image
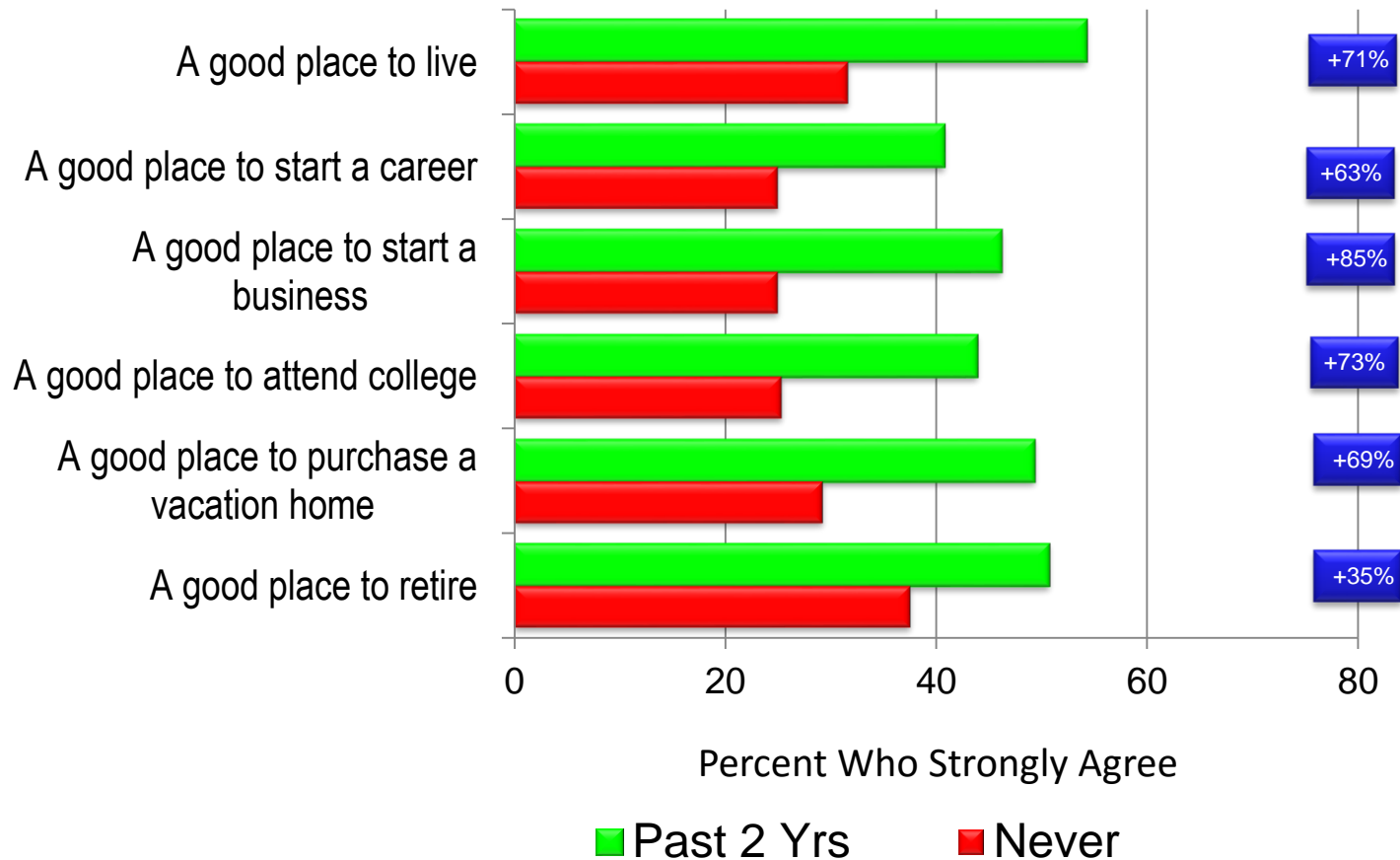
**Base: Out-of-State Residents**



Percent Who Strongly Agree

- A good place to live — +40%
- A good place to start a career — +47%
- A good place to start a business — +82%
- A good place to attend college — +54%
- A good place to purchase a vacation home — +45%
- A good place to retire — +53%

■ Aware   ■ Unaware

# Impact of *Visitation* on Mississippi Gulf Coast Economic Development Image

Base: Out-of-State Residents

Percent Who Strongly Agree

- A good place to live — +71%
- A good place to start a career — +63%
- A good place to start a business — +85%
- A good place to attend college — +73%
- A good place to purchase a vacation home — +69%
- A good place to retire — +35%

Past 2 Yrs   Never

# "A Good Place to Live"

## % Image Lift For Mississippi Gulf Coast



Bar chart showing % Image Lift values: Advertising = 40, Visitation = 71, Advertising Plus Visitation = 110. X-axis labeled "Percent" ranging from 0 to 200.
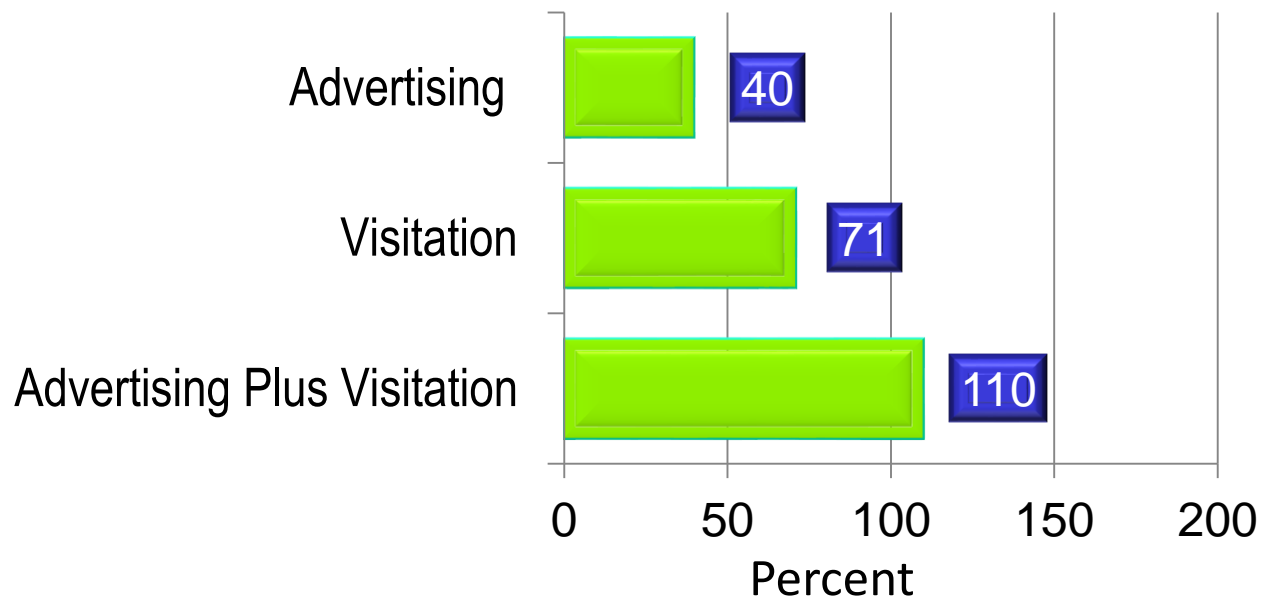
# "A Good Place to Start a Career"



% Image Lift For Mississippi Gulf Coast

Advertising — 47

Visitation — 63

Advertising Plus Visitation — 97

Percent
(0, 50, 100, 150, 200, 250)
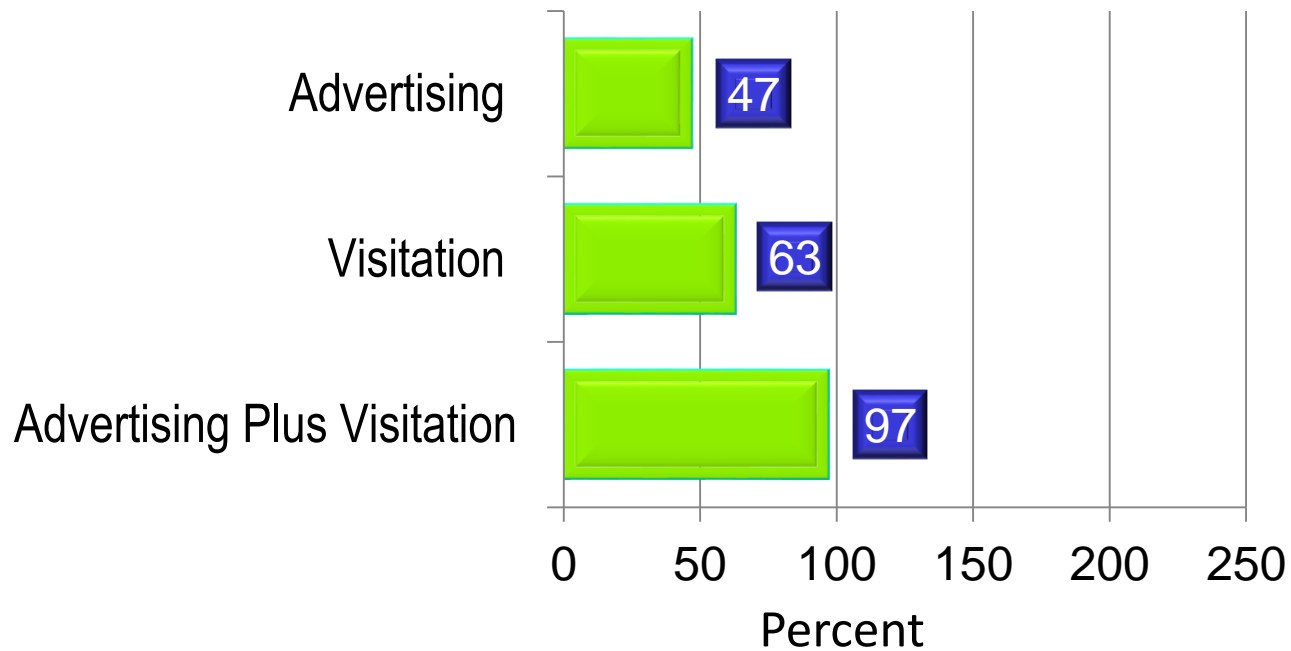
# "A Good Place to Start a Business"



% Image Lift For Mississippi Gulf Coast

Advertising — 82

Visitation — 85

Advertising Plus Visitation — 170

Percent
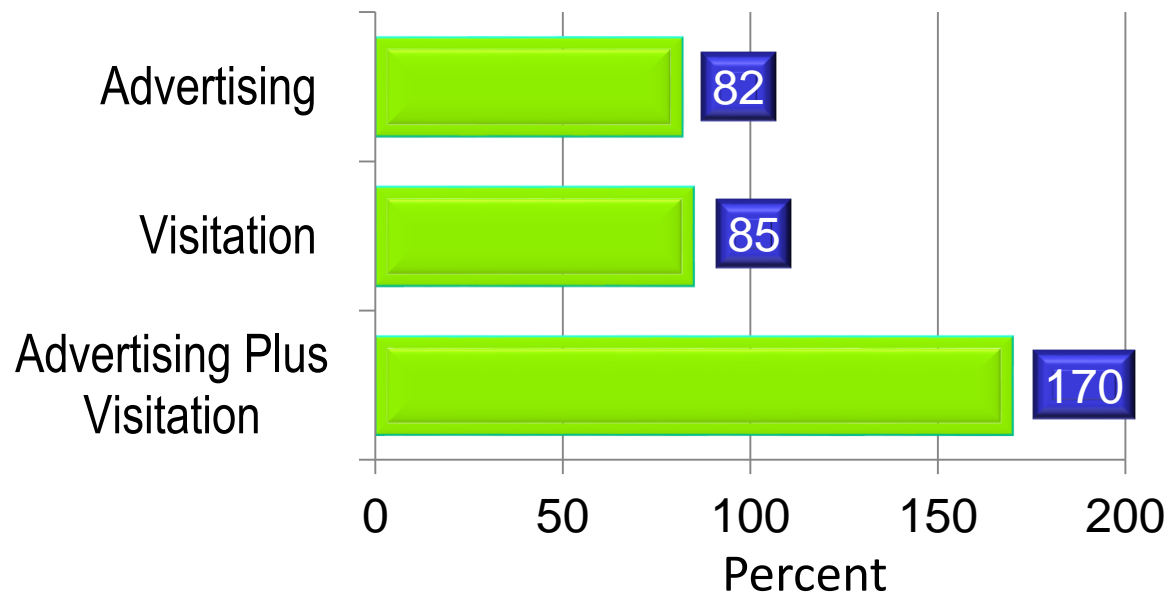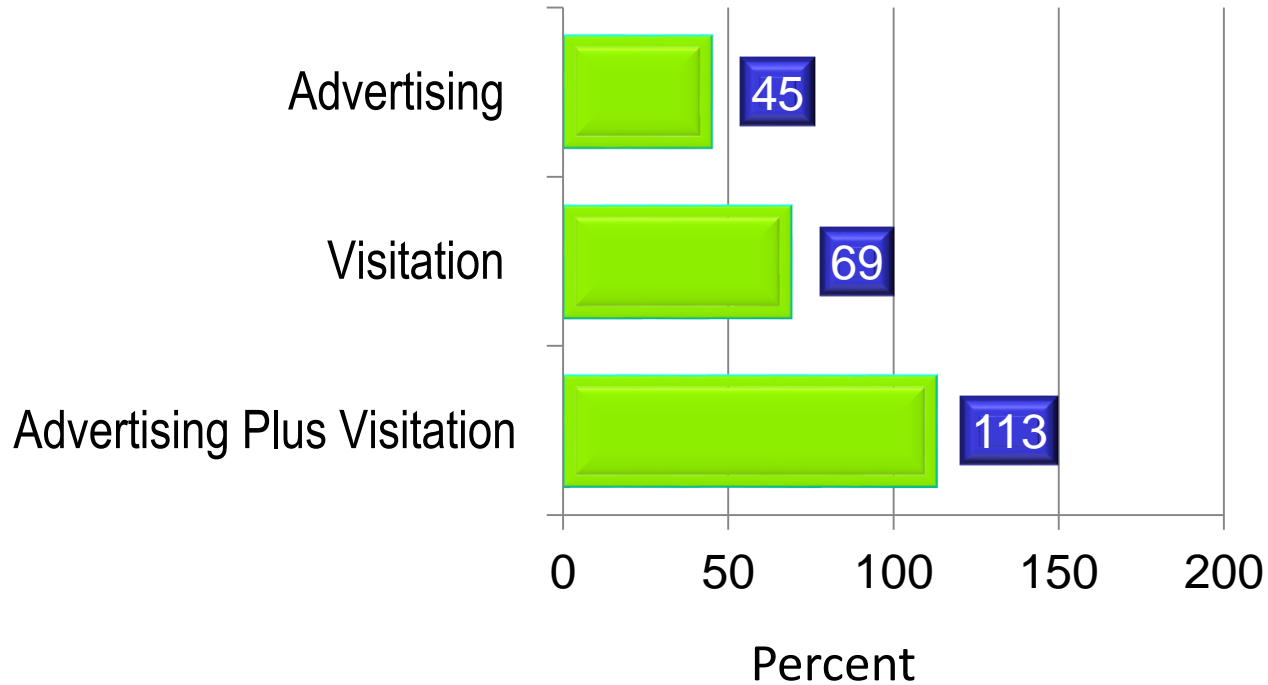
# "A Good Place to Attend College"

## % Image Lift For Mississippi Gulf Coast



139
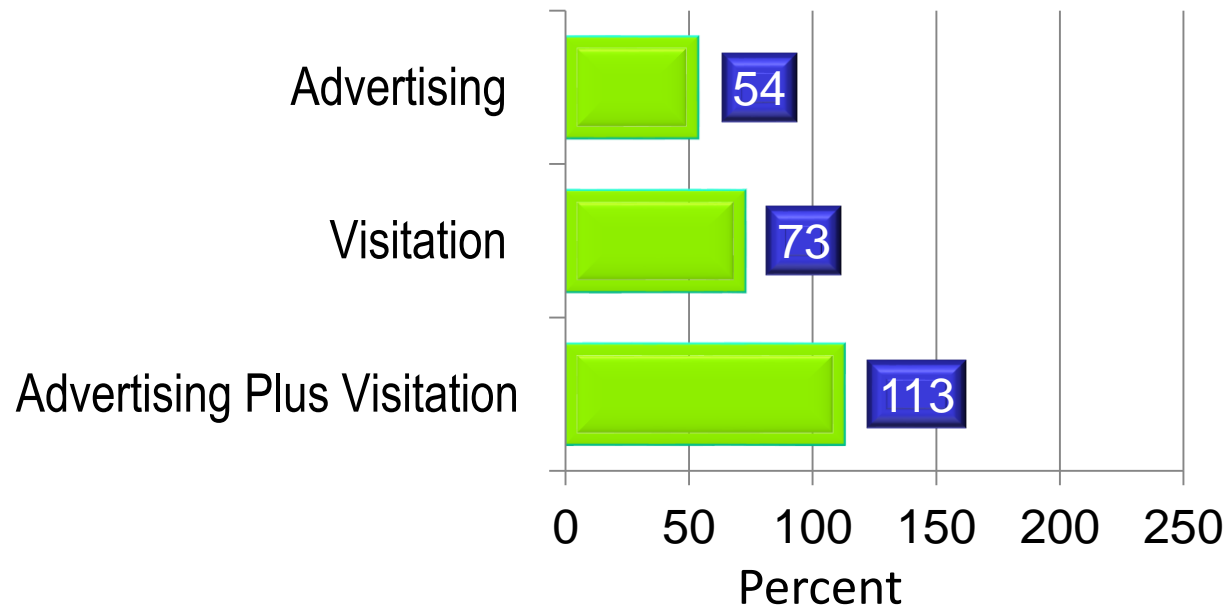
# "A Good Place to Purchase a Vacation Home"

## % Image Lift For Mississippi Gulf Coast

| Category | Percent |
|---|---|
| Advertising | 45 |
| Visitation | 69 |
| Advertising Plus Visitation | 113 |

Percent

# "A Good Place to Retire"

## % Image Lift For Mississippi Gulf Coast



Bar chart showing percent image lift:
- Advertising: 53
- Visitation: 35
- Advertising Plus Visitation: 76

X-axis: Percent (0, 50, 100, 150, 200)