



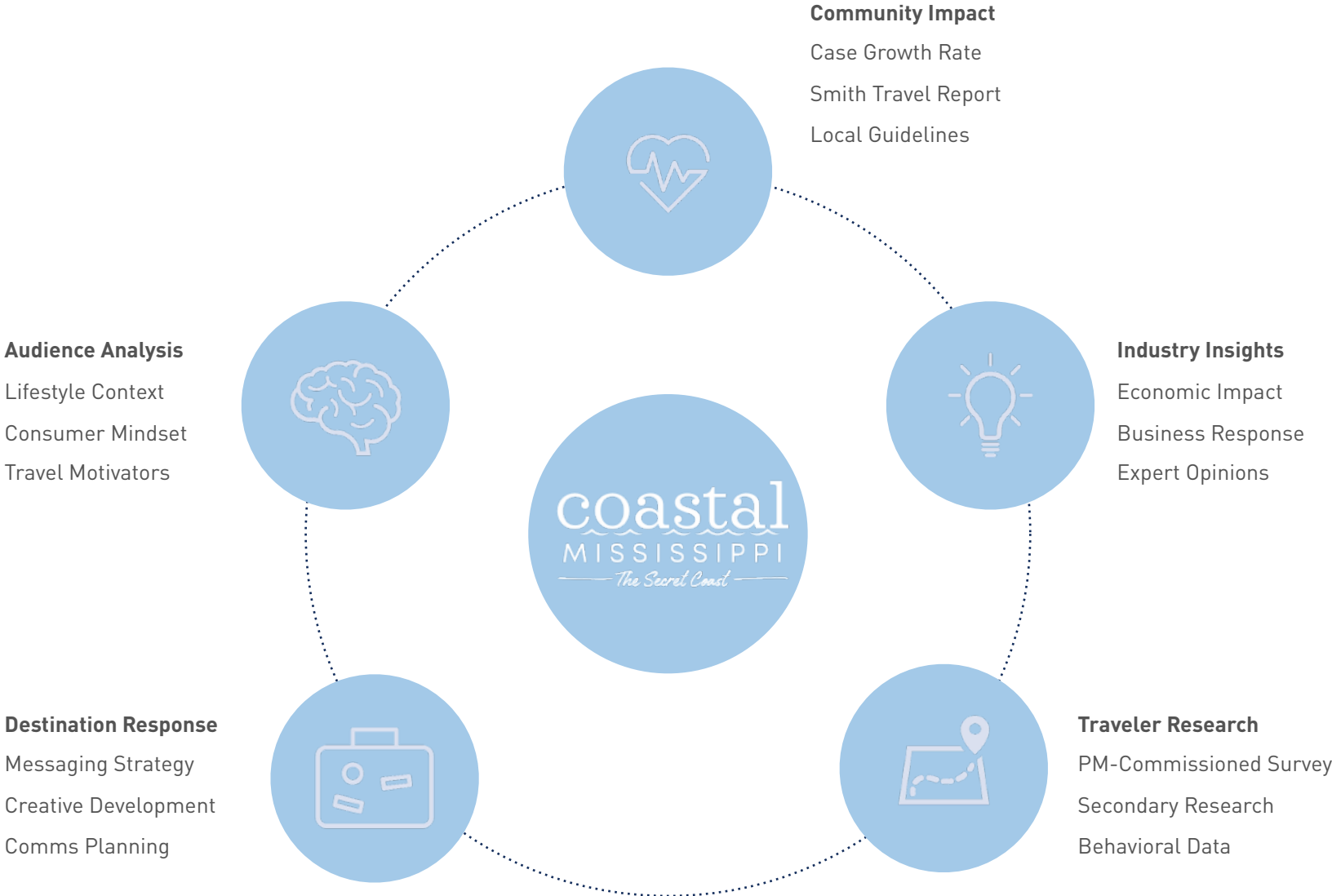
PETERMAYER

# Coastal Mississippi

## Reentry to Market Plan

May 15, 2020

# These last few weeks we dove into the impact of COVID-19 on travel and Coastal Mississippi



## Several factors from our research will influence our final recommendation for returning to market

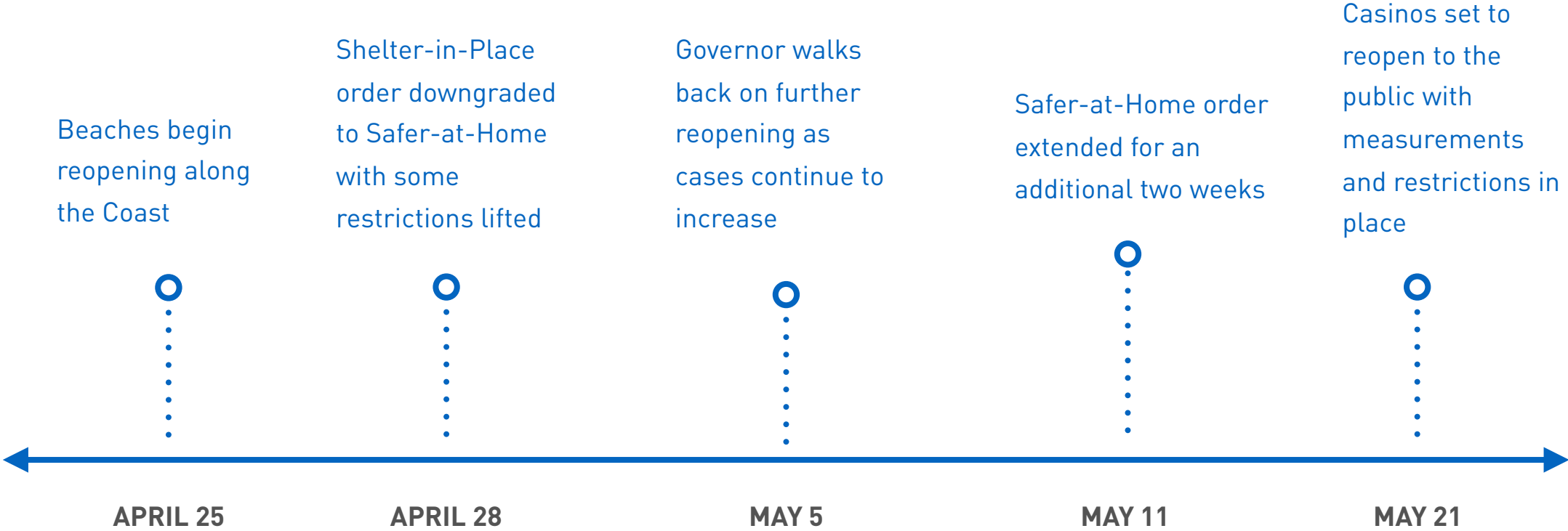
- Guidance from local leaders and public health officials
- Readiness of the destination for tourism
- Input from partners and stakeholders
- Consumer sentiment and travel intent
- Industry and competitive analysis



**But before we ask visitors to return to our shores, we need to determine when and how to do so**



# Mississippi is currently in the initial phases of reopening, practicing extreme caution as the state pushes forward



The current Safer-at-Home order is meant **to give locals the means to help stimulate the economy and support small businesses**



# SAFER AT HOME

WHAT A STATEWIDE SAFER AT HOME ORDER MEANS FOR MISSISSIPPI

## YOU CAN

GO TO GROCERY STORE

GO TO MEDICAL APPOINTMENTS AND THE PHARMACY

CARE FOR A SICK LOVED ONE

WALK YOUR DOG, GO FISHING, BE IN NATURE

USE DELIVERY OR CURBSIDE SERVICES

TRAVEL FOR WORK IF NECESSARY

ATTEND PARKING LOT CHURCH SERVICES

## YOU SHOULD NOT

HOST GATHERINGS OF 10 OR MORE, SUCH AS WEDDINGS OR FUNERALS

GET CLOSER THAN 6 FEET TO OTHERS

LEAVE YOUR HOME FOR NON-ESSENTIAL ERRANDS

VISIT LOVED ONES IN THE HOSPITAL, NURSING HOME, OR LONG-TERM CARE

GO TO A SALON OR BARBERSHOP TO GET YOUR HAIR DONE

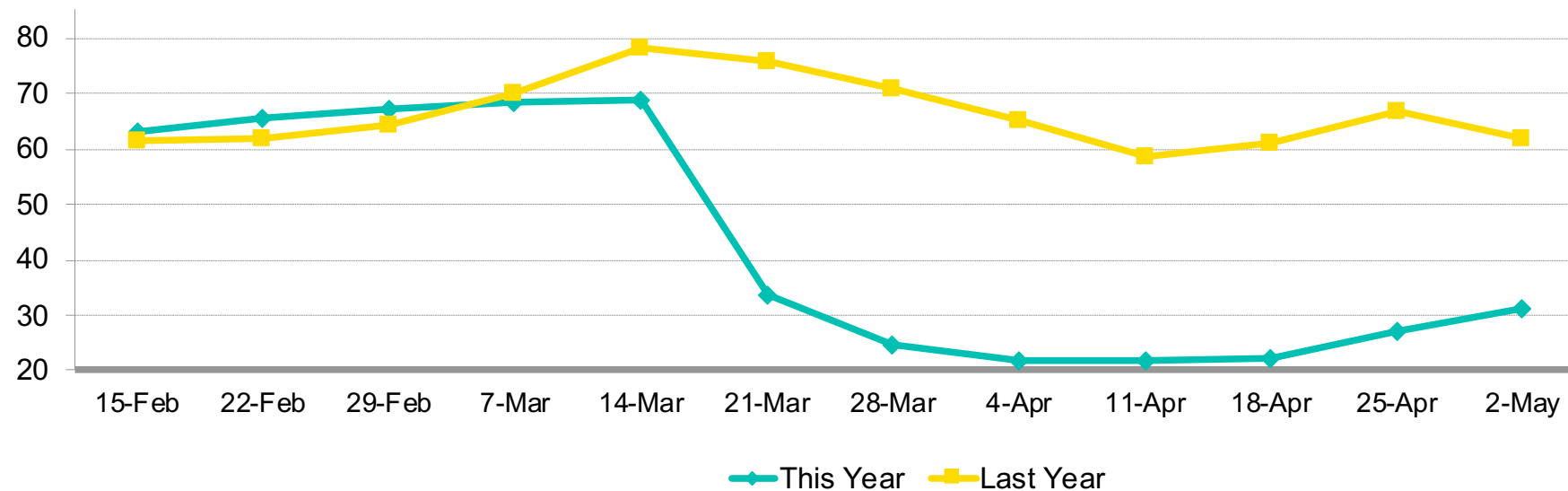


GO TO [GOVERNORREEVES.MS.GOV/COVID-19](https://www.governorreeves.ms.gov/covid-19) FOR OUR SAFER AT HOME FAQ



# While visitation is increasing as the state reopens, we have to walk a fine line encouraging visitors to return while keeping them safe

Weekly Occ (%) - Feb 15, 2020 to May 02, 2020



Occupancy rates have risen **+50%** since stay-at-home order expired



**This responsibility will have to be balanced against the reality of a need to drive business during the peak summer months**





While ensuring the health of our brand and community is **protected from lasting, long-term damage**


 Daily Mail

### Mask-less Florida residents flock to reopened restaurants and ignore social distancing orders

Florida residents have flocked to restaurants that were allowed to reopen this week, but have notably ignored guidance to wear masks in public ...

In-Depth · 11 hours ago



 Washington Post

### #FloridaMorons trends after people flock to reopened Florida beaches

On the same day as Florida's highest daily coronavirus death toll, DeSantis told reporters that it's essential Floridians get exercise outdoors.

3 weeks ago



 al.com

### Alabama's virus numbers rise as beaches, stores, other venues open

Alabama's virus numbers rise as beaches, stores, other venues open.

Posted May 02, 2020 ...

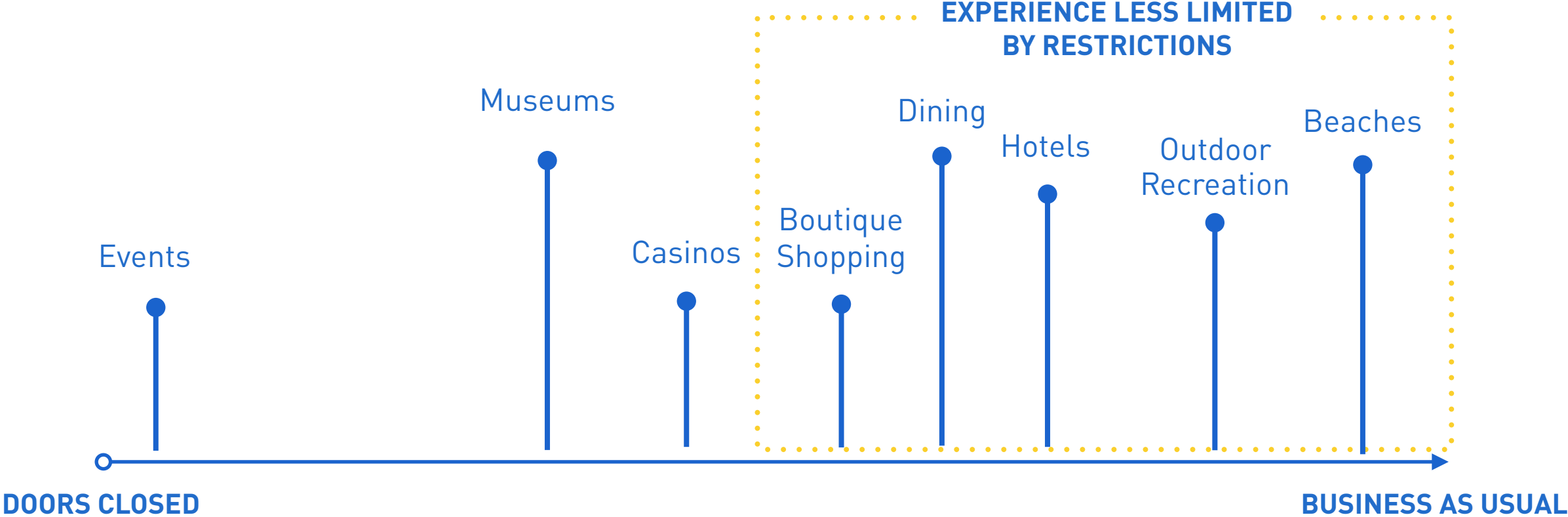
5 days ago



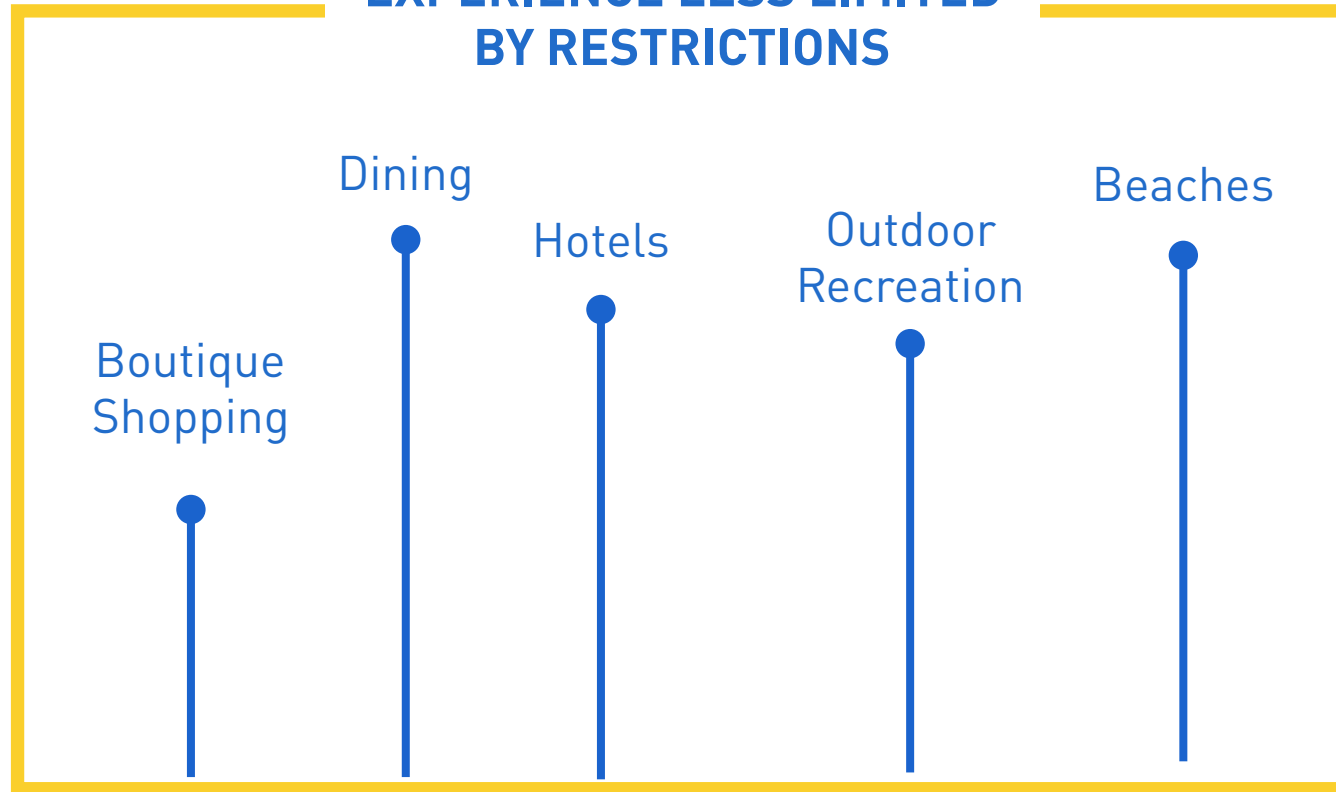


As we monitor the guidance of public officials, we can gauge the readiness of our destination for visitors by **assessing the state of assets across the destination**

# The reality of reopening measures will dictate the **readiness and appeal of assets for visitors to our destination**



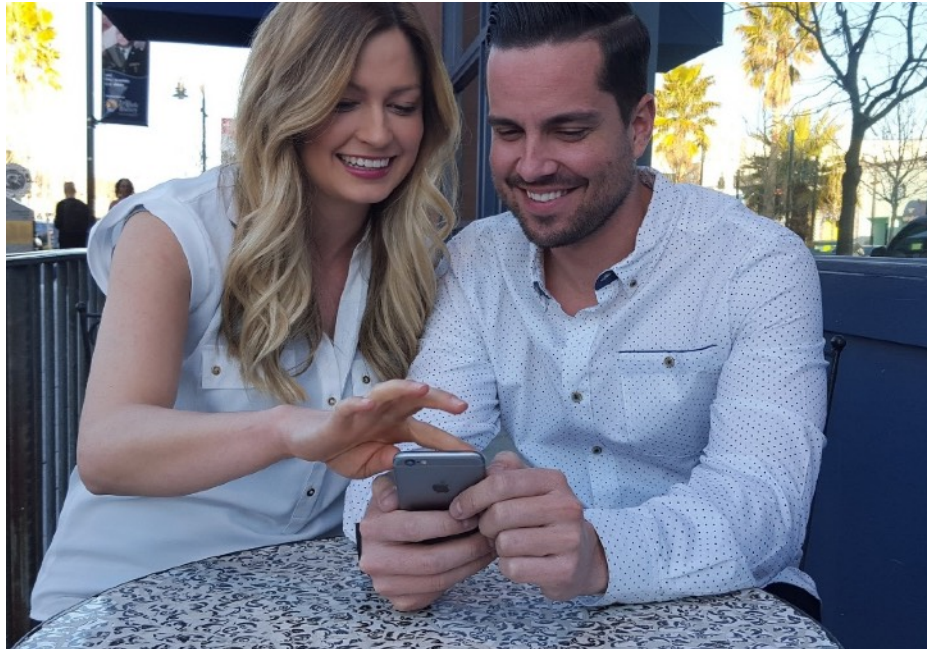
**EXPERIENCE LESS LIMITED  
BY RESTRICTIONS**











**The Key Question:**  
How do we communicate the visitation experience when speaking to our audience in a thoughtful and responsible manner?



# Just three months ago, it was business as usual for our audience...



## EXPERIENTIAL TRAVELERS ADAM & CHRISTINA | THE CLARKS

AGE	OCCUPATION	FINANCES (\$)
<b>32</b>	HEALTHCARE MANAGEMENT + SALES	<b>80K</b> HOUSEHOLD INCOME
CORE VALUES		
<b>ACTIVE ENTHUSIASTS</b>  Driven by excitement, always on the lookout for stimulating and unique experiences to share together	<b>CURIOSITY</b> <b>ADVENTURE + EXCITEMENT</b> <b>AUTHENTICITY + FREEDOM</b> <b>ENJOYING LIFE</b>	
ACTIVITIES/HOBBIES	SHOPPING BRANDS	
Going to the beach Baking & BBQing Entertaining friends & family Indulging their foodie side Reading books	  	
MOST TRUSTED MEDIA	TV CHANNELS	
	  	



# And then COVID-19 arrived



Everything in our consumers' lives has now  
**changed.**





# How They Work





# How They Spend





# How They Celebrate



# How They Value Time

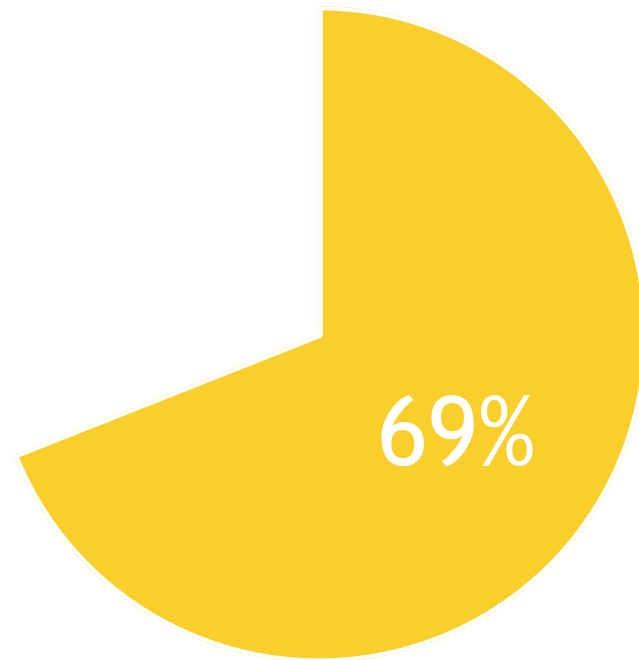


# How They Consume

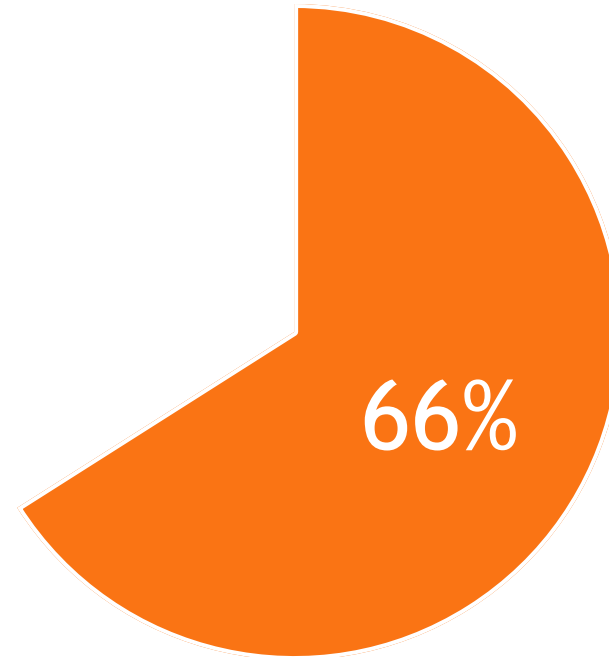


# How They Escape

# Two-thirds of travelers have postponed or cancelled their trips since the crisis began



Have postponed at least 1 trip

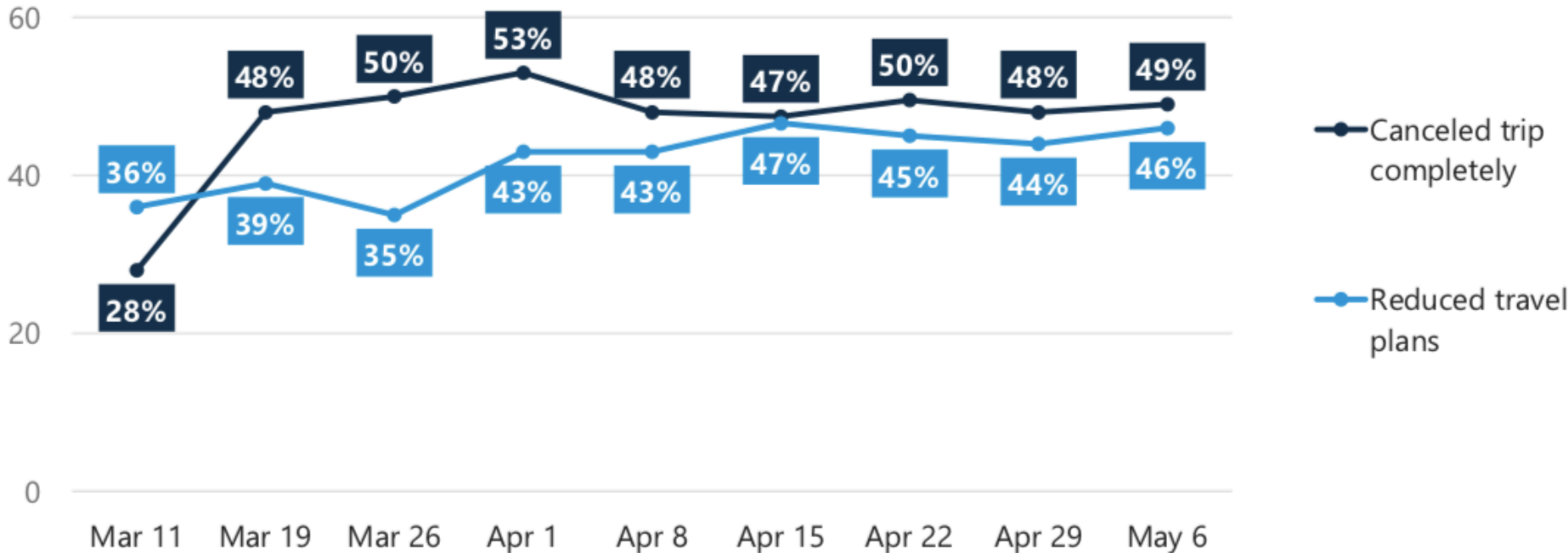


Have cancelled at least 1 trip



# Would-be travelers are now in “wait and see” mode — trying to anticipate how to adjust their plans for the year

### Impact of COVID-19 on Upcoming Travel Plans Comparison

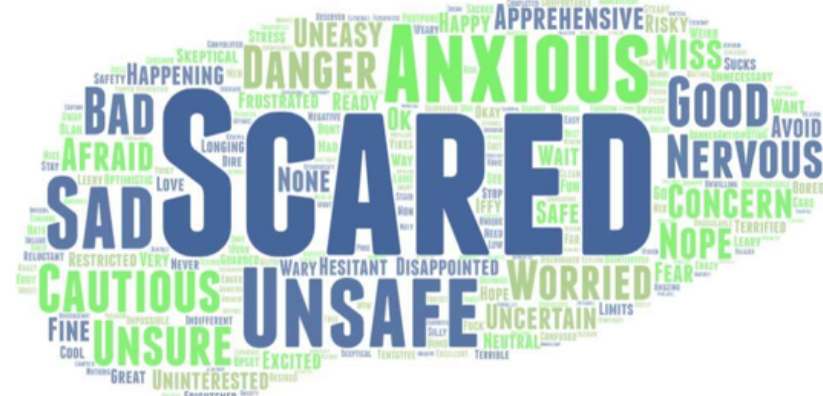


Base: Coronavirus Changed Travel Plans



# Their decisions will ultimately be driven by sentiment on how safe and comfortable they feel traveling again

**What One Word Best Describes How You Feel About Travel Right Now?**



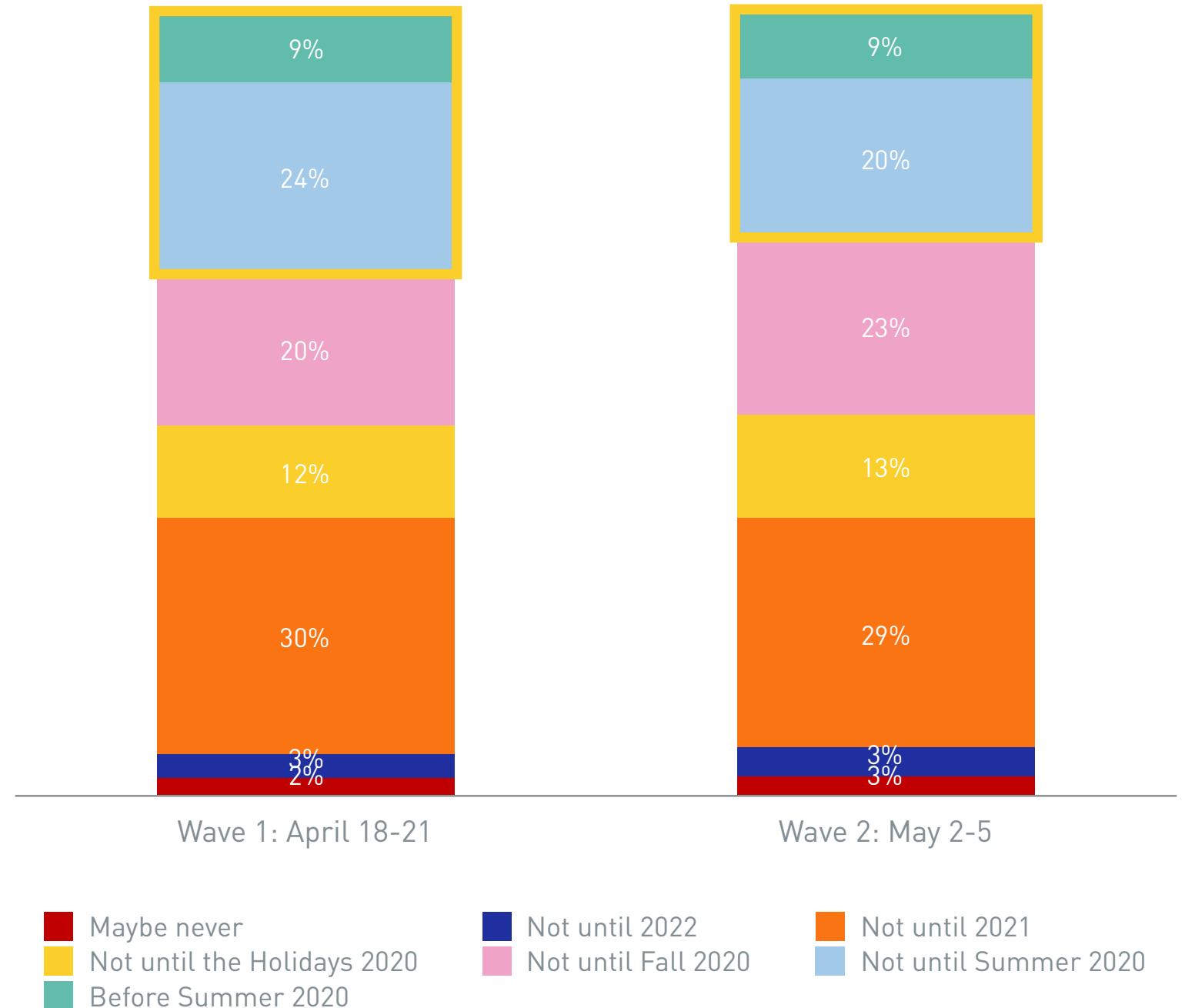
March 30th —————> April 27th



Source: Destination Analyst

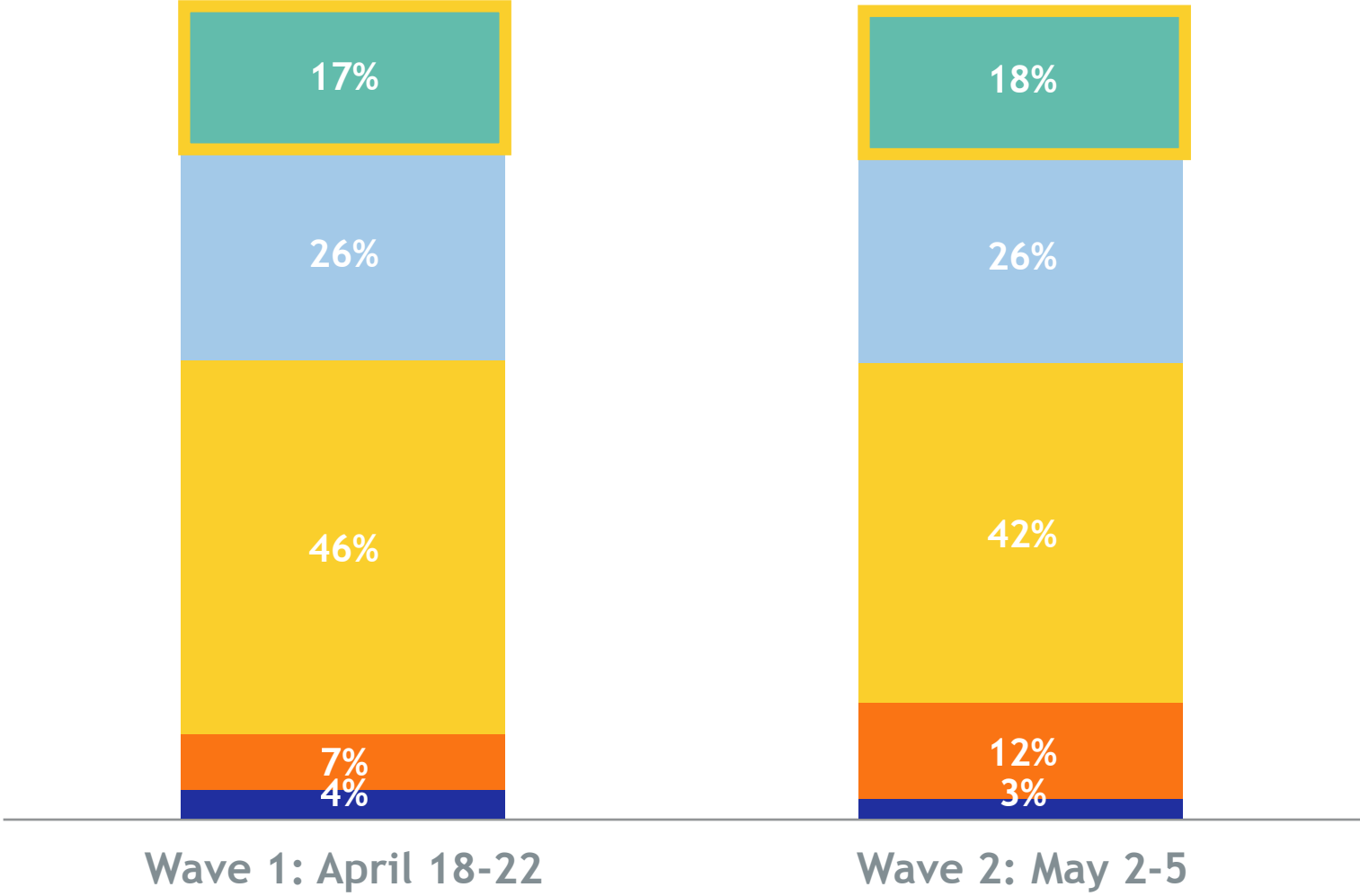


Most expect that time to come later, **but some are more optimistic — anticipating traveling by at least the summer**



Source: PM Traveler Survey Wave 1 // Wave 2

**These travelers are eager to hit the road as soon as restrictions lift in contrast to others approaching the idea of travel with more caution**



- Other
- As soon as a vaccine is available
- As soon as travel restrictions are lifted
- Maybe never
- As soon as non-essential travel is widely approved



# Two distinct groups of travelers are emerging out of the crisis:

## Ready to Go

**33%**

ready to travel by summer or earlier

**Less likely to feel stressed** under normal circumstances

**43%**

ready to travel when restrictions are lifted

**More likely to value and prioritize travel** in their lives

## Travel Averse

**66%**

not traveling until at least fall

**Less likely to have travel** top-of-mind at the moment

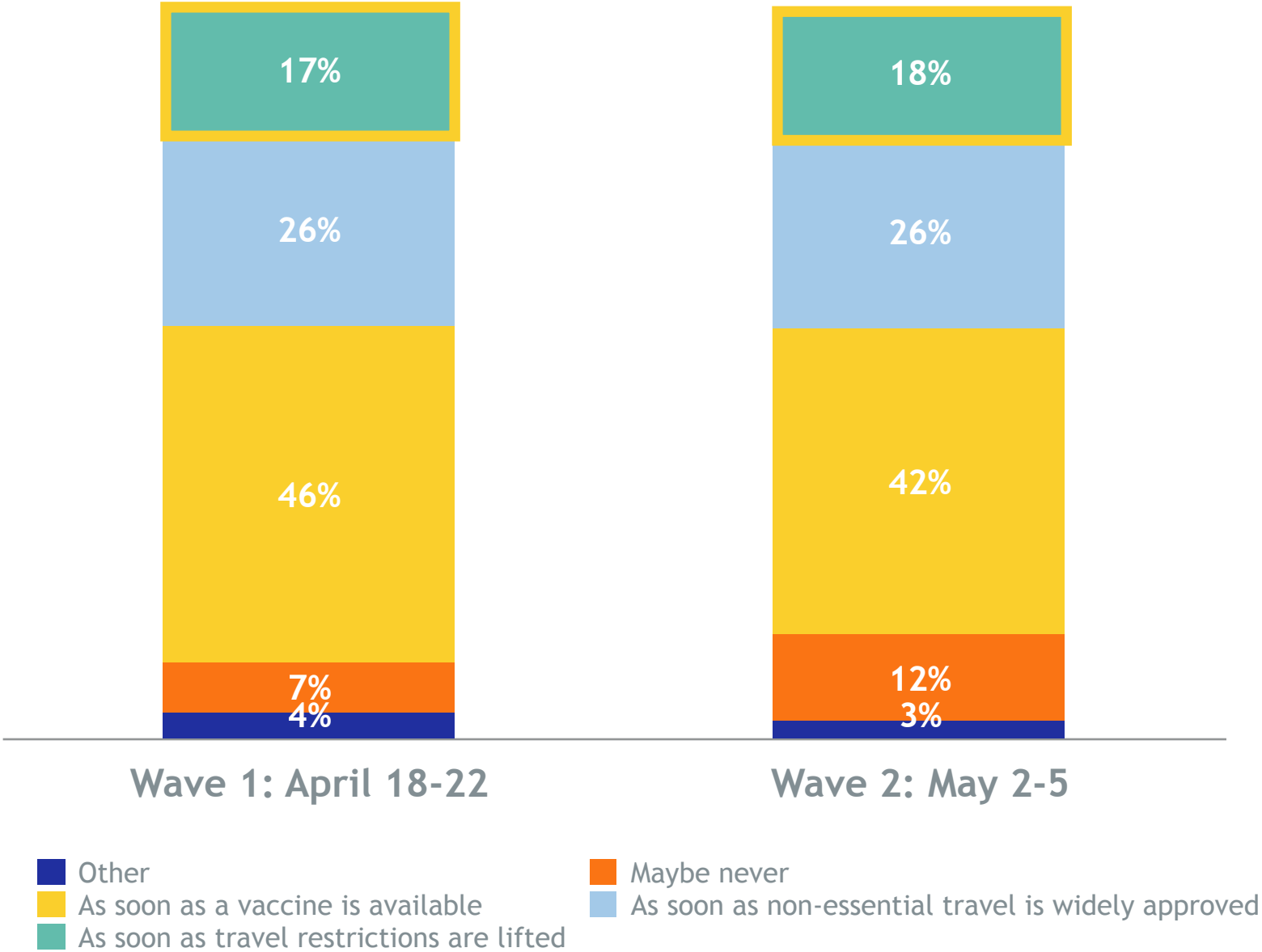
**More likely to be concerned** by various travel options

**46%**

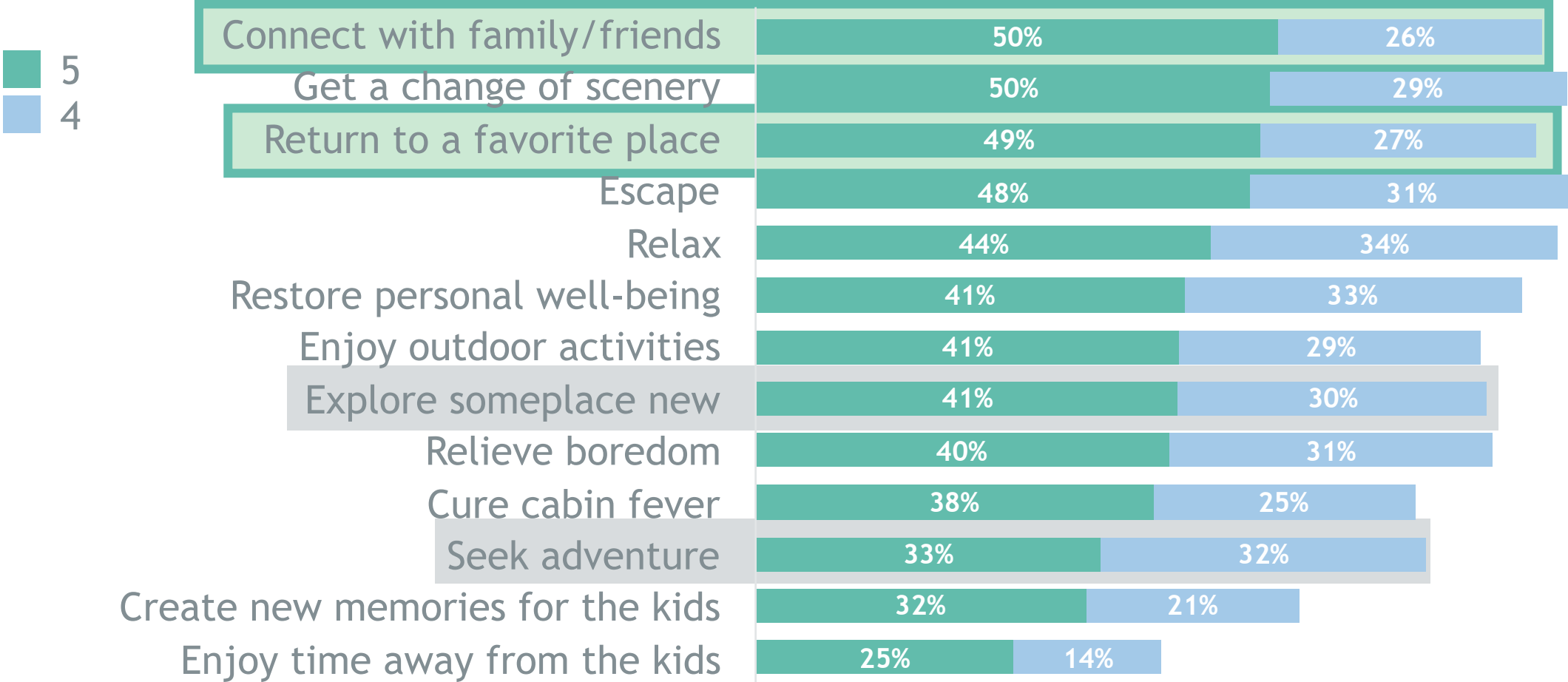
won't be comfortable until there's a vaccine



The 'Ready-To-Go' travelers are eager to hit the road as soon as restrictions lift in contrast to the 'Travel Averse' who are approaching the idea of travel with more caution



# Our Ready-To-Go travelers will opt for familiarity and comfort over discovery and adventure



“On a scale of 1 to 5, 5 being a very strong motivator, what are the reasons you will be eager to travel once restrictions lift?”



Source: PM Traveler Survey Wave 2

**Coastal Mississippi  
may already be on  
their radar to visit  
as a destination  
they know and love  
with all the  
comforts of home**

**85%**

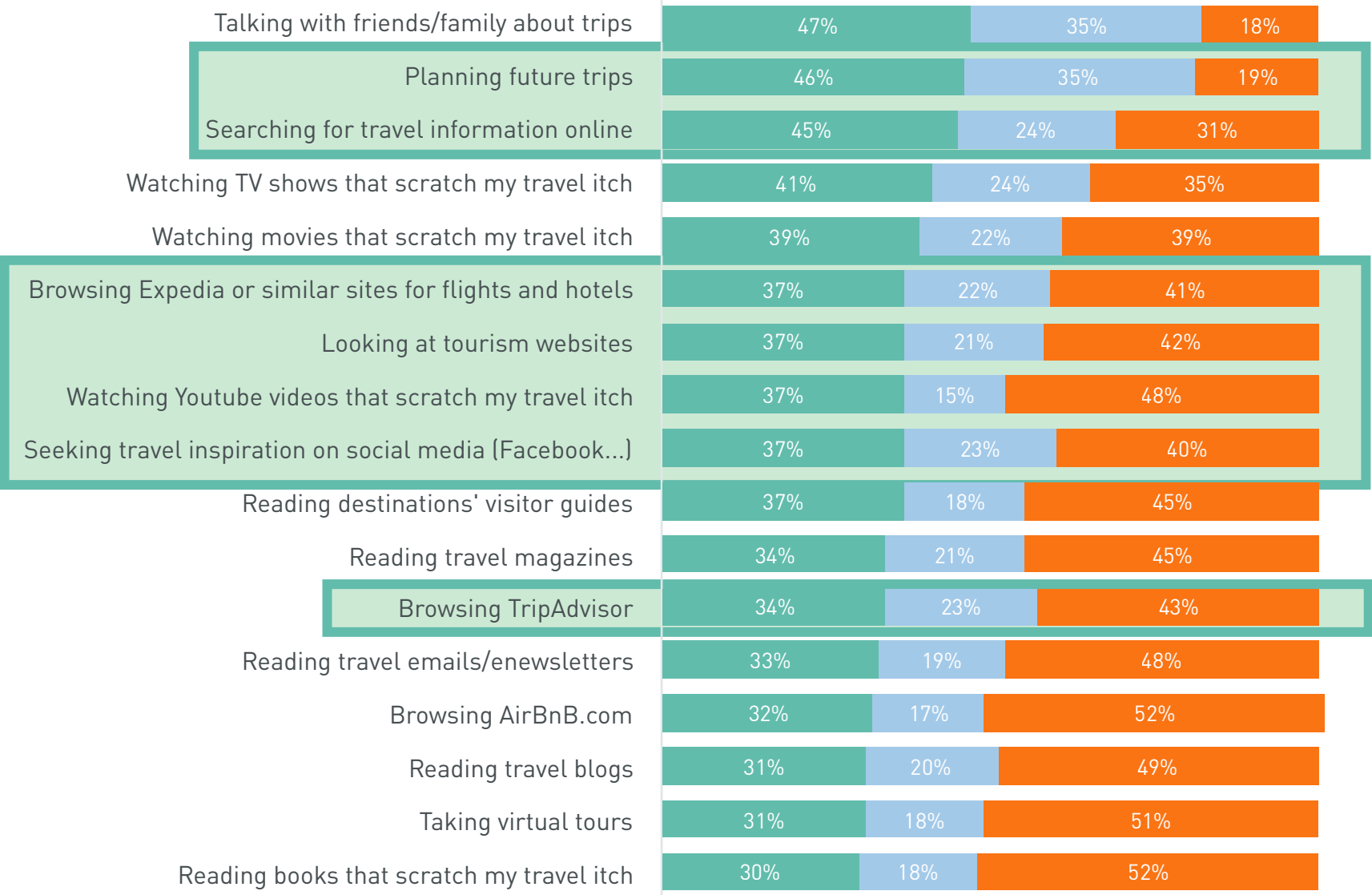
of visitors to Coastal Mississippi  
have been in the past

**28%**

of visitors travel to visit  
friends and family



Still actively engaged across trip planning sources, we have **opportunities to reach them as digital hand-raisers**



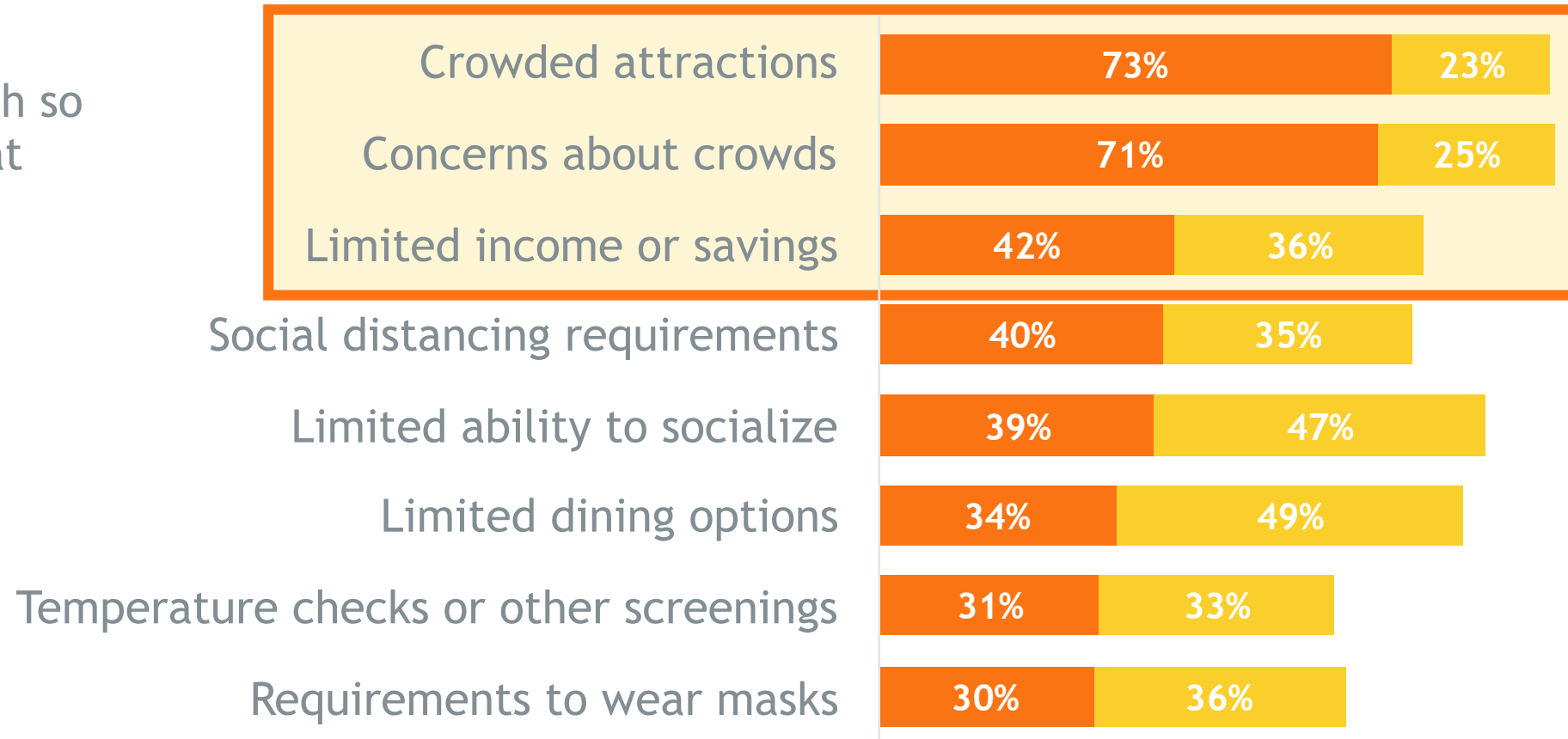
Often Occasionally Not at all



Source: PM Traveler Survey Wave 2

# For the Travel Averse, health and financial concerns will keep them from traveling in the near term

■ Very much so  
■ Somewhat

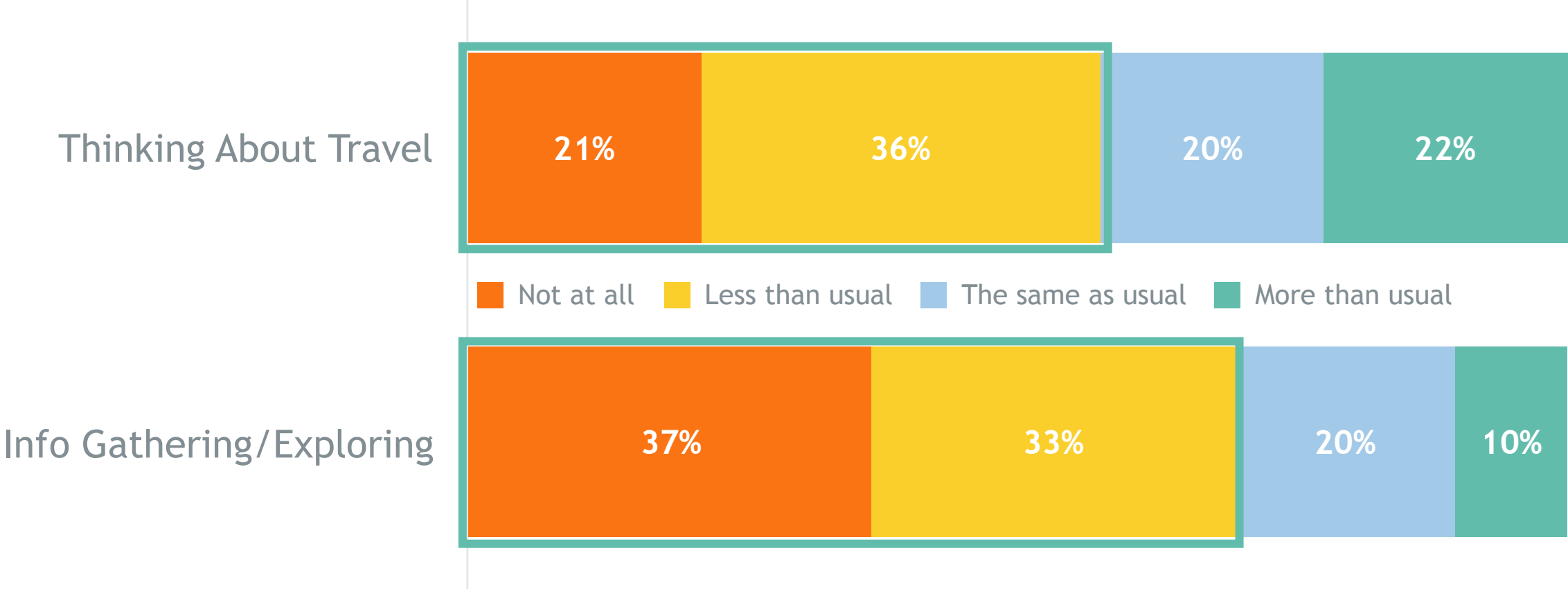


*“What would continue to keep you from traveling even once restrictions lift?”*

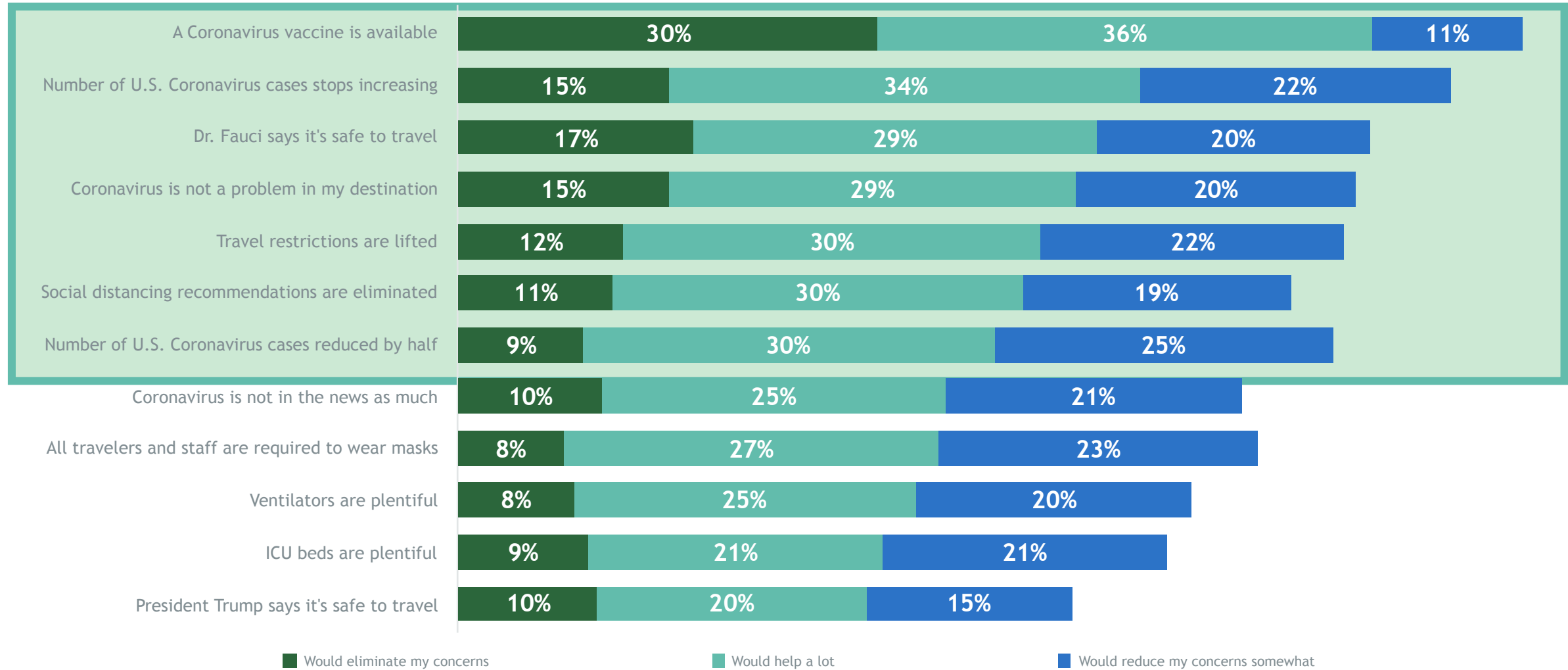




# Many are even dreaming of travel less than usual as **planning their next trip takes a backseat in their minds**



# The Travel Averse's intent to travel will return once the spread of the virus is further contained and health officials deem it safe

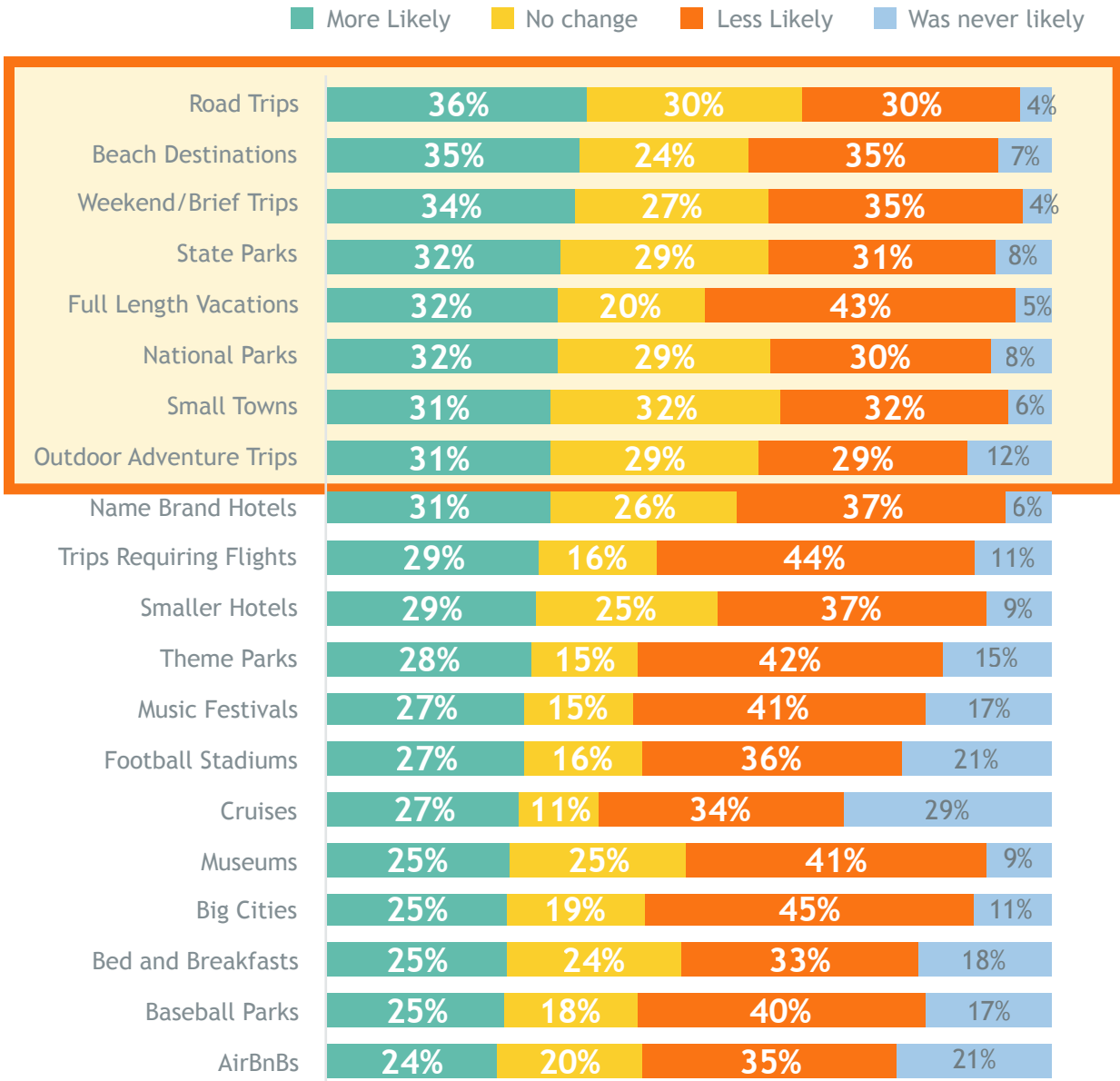


"To what degree would each of the following make you less concerned about travel?"



Source: PM Traveler Survey Wave 1 // Wave 2

When they do feel comfortable traveling once again, we can rest easy knowing that **Coastal Mississippi is the type of destination they'll be looking for**



What does this mean for how we inspire **Ready-To-Go** travelers to begin dreaming of a trip to **Coastal Mississippi**?



As we track shifts in the mindset of consumers, we'll look for four phases of traveler behavior to be dictated:

- 1 Wait** — Bracing for what the future holds
- 2 Acclimate** — Adjusting to a partially opened America
- 3 Consider** — Experimenting with travel planning
- 4 Escape** — Travel industry & America fully open



1

**Wait** — Bracing for what the future holds

2

**Acclimate** — Adjusting to a partially opened America

3

**Consider** — Experimenting with travel planning

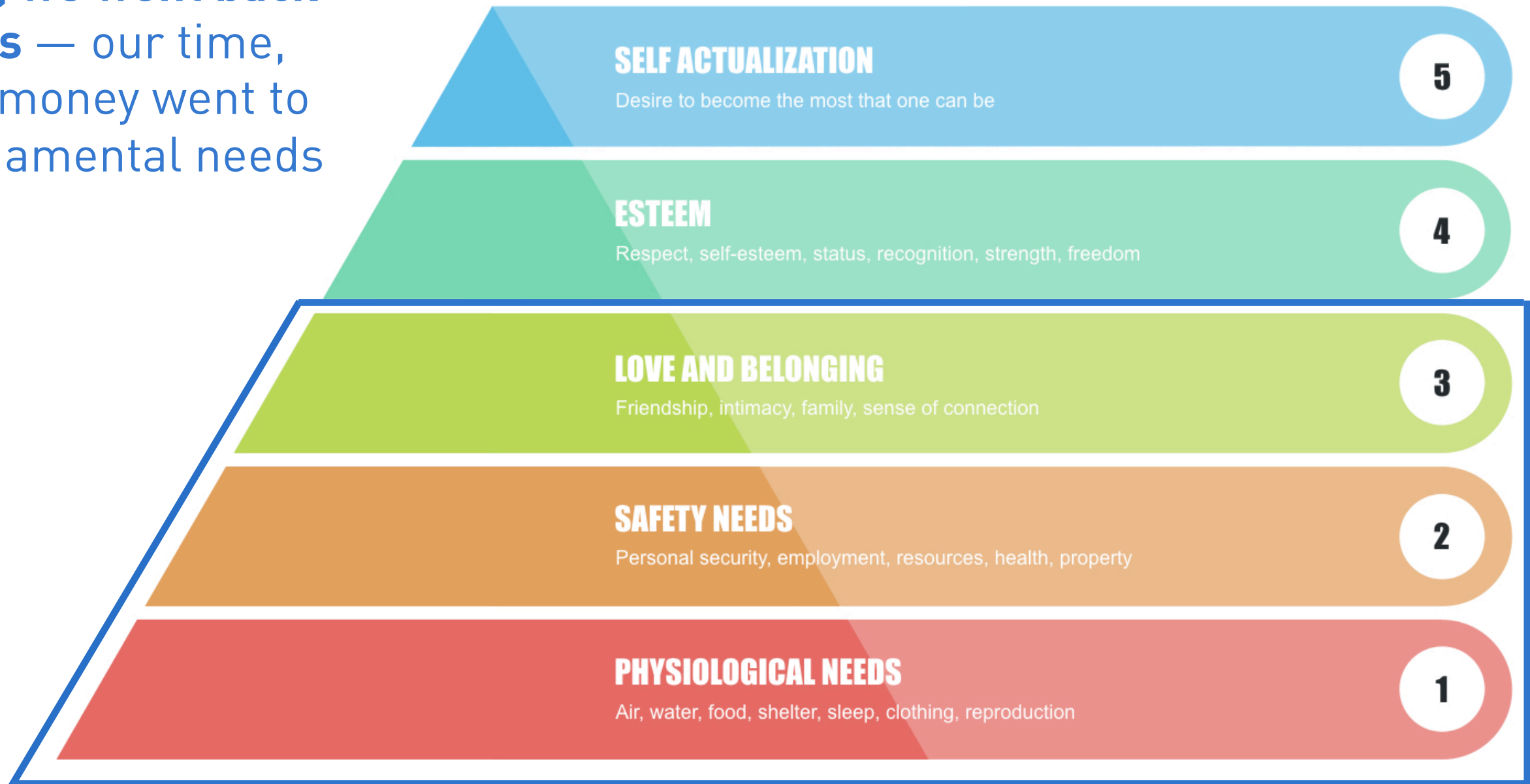
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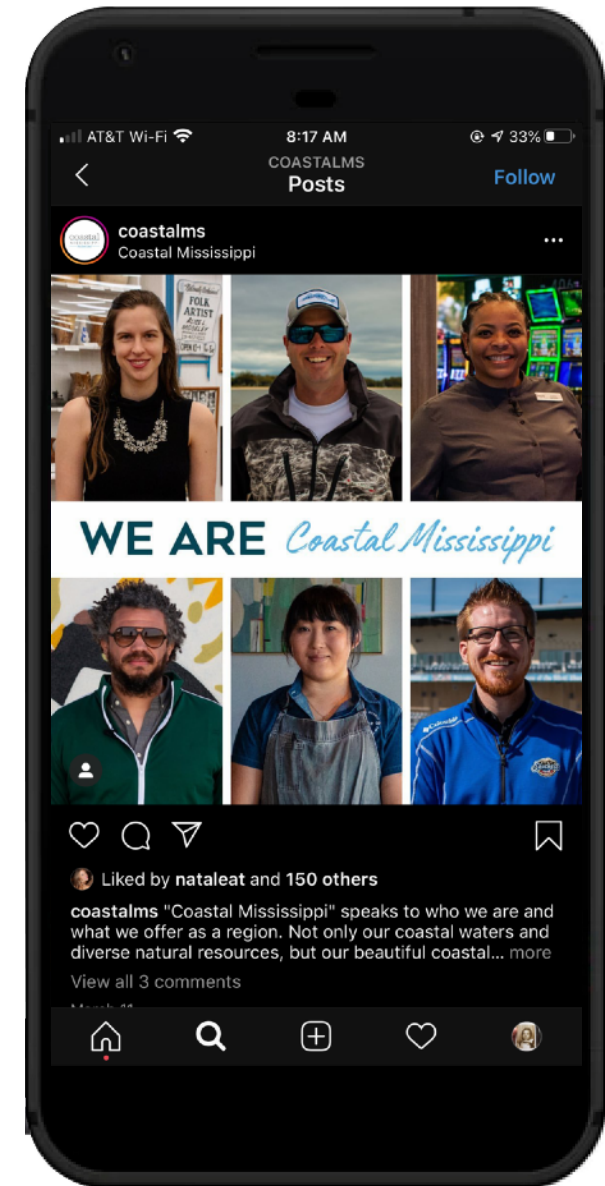
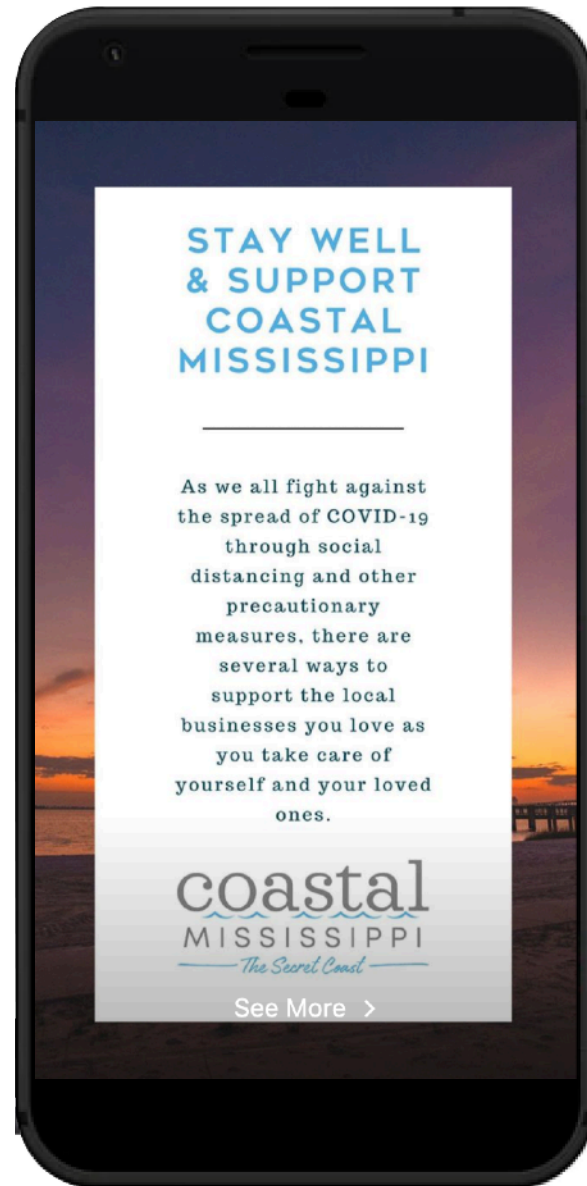
**Escape** — Travel industry & America fully open



# MASLOW'S HIERARCHY OF NEEDS

At the start, we went back to the basics — our time, energy and money went to ensure fundamental needs are met.







**1 Wait** — Bracing for what the future holds

**2 Acclimate** — Adjusting to a partially opened America

**3 Consider** — Experimenting with travel planning

**4 Escape** — Travel industry & America fully open



# Now, new needs are becoming evident as people look ahead and ask themselves what comes next

Survival	Autonomy	Anxiety	Tech as Savior	Cabin Fever	Direct-to-Door	Virtual Adventures
Enjoying Nature	Sustainability	Isolation	Loneliness	Small Mercies	Time Well Spent	Slow Living
Communities	Giving Back	Family Time	Local	Digital Activism	Burn Out	Boredom
Personal Growth	Work-Life Balance	Finance	Mental Health	Digital Activism	Fitness	Home Improvement



# There's a brand opportunity in how we message our destination

**83%** say that the way companies conduct themselves during the crisis will impact whether they do business with them in the future

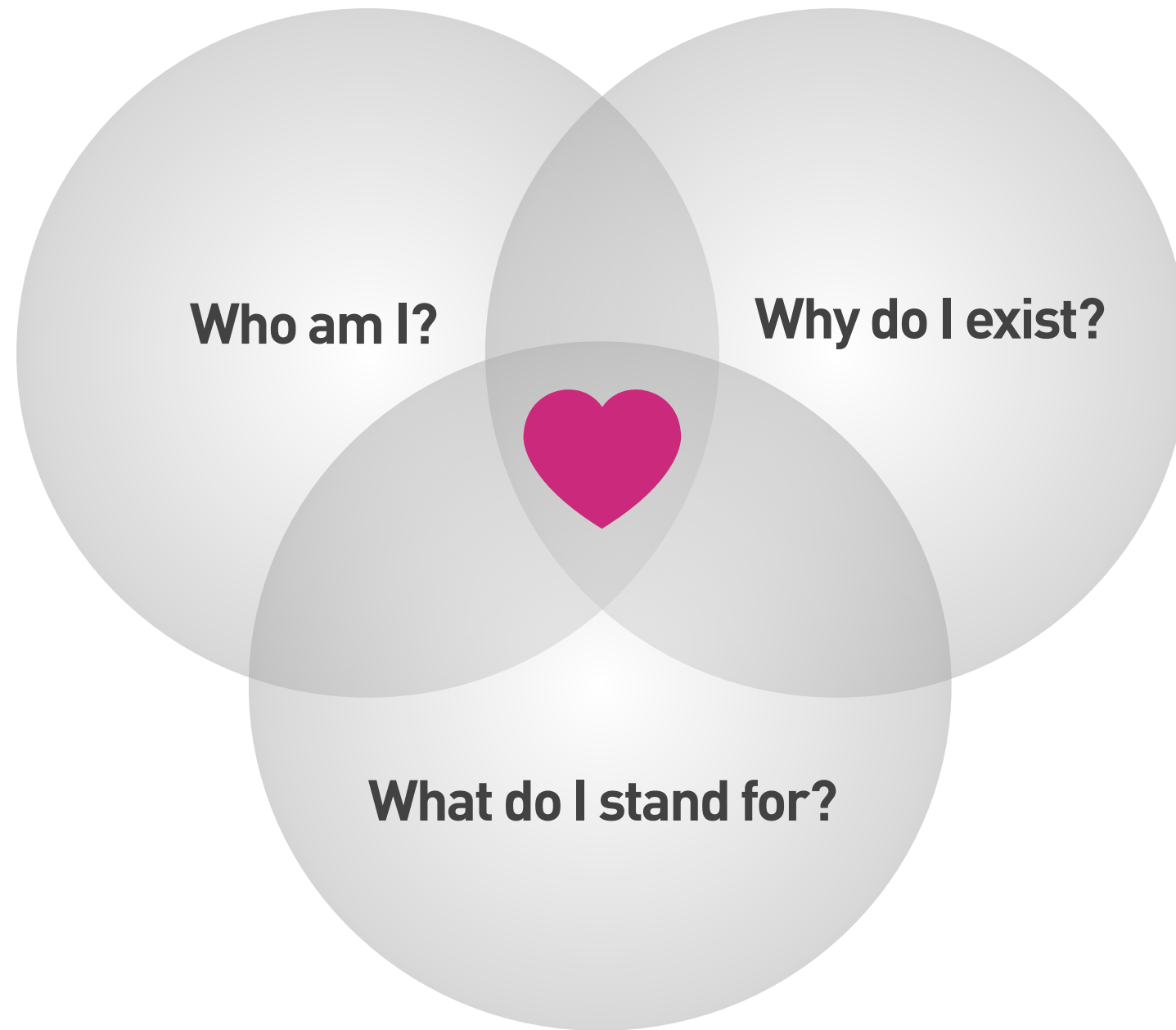
**77%** of respondents expect their brands to be helpful in what has become "the new everyday life"

**77%** of respondents believe companies must make decisions that are in the broader interest of the community right now

**75%** of respondents say companies should not exploit the health crisis to promote themselves

**70%** of respondents said brands should adopt a more "reassuring" tone





# How can we elevate our positioning into purpose?



Coastal Mississippi offers over 60 miles of attractions, towns and shorelines that are equal parts relaxing and invigorating.



# We start with what our visitation experience offers — **both in solutions and inspiration**

Survival	Autonomy	<b>Anxiety</b>	Tech as Savior	<b>Cabin Fever</b>	Direct-to-Door	Virtual Adventures
<b>Enjoying Nature</b>	Sustainability	<b>Isolation</b>	<b>Loneliness</b>	Small Mercies	<b>Time Well Spent</b>	<b>Slow Living</b>
<b>Communities</b>	Giving Back	<b>Family Time</b>	Local	Digital Activism	<b>Burn Out</b>	<b>Boredom</b>
Personal Growth	Work-Life Balance	Finance	<b>Mental Health</b>	Digital Activism	Fitness	Home Improvement



Source: BBH Brands & COVID

Taking note of the **parity** in the industry and among competitors will help us breakthrough the clutter



# Finally, we consider the **implications** for our brand elements

BRAND FEATURES

## Variety in:

- Gulf
- Communities
- Gaming
- Fests
- Food

Endless

BRAND PILLARS

## Observe:

- Celebration
- Adventure
- Entertaining

Delight

## Feel:

- Welcoming
- Imaginative
- Generosity

Family







**There's a unique  
experience to be had**  
here that suits the new  
needs of travelers and  
resonates in our  
changed world

What We Provide:

**The freedom to explore  
as much (or as little) as  
you'd like**

Needs Addressed:

Cabin  
Fever

Isolation

Time Well  
Spent

Boredom



What We Provide:

## The comfort of wide-open coastlines and natural spaces

Needs Addressed:

Anxiety

Enjoying Nature

Slow Living

Mental Health



What We Provide:

# The welcoming embrace you've needed

Needs Addressed:

Loneliness

Communities

Time Well Spent

Family Time



What We Provide:

**The chance to relax  
and reinvigorate**

Needs Addressed:

Anxiety

Cabin  
Fever

Burn Out

Boredom





## Our Brand Role

In Coastal Mississippi, you'll **experience the promise of unlimited possibility with the comforts of home.**



These learnings and opportunities come together **to inform marketing recommendations for Phase 2 and beyond**

# Refocus Messaging Objectives

- ✓ For those ready to travel **NOW**, lead them to the tools and information they need to plan the trip that's right for them
- ✓ For those looking to travel in the **FUTURE**, tell the story of how fulfilling a visit to Coastal Mississippi can be





# Adjust Comms Strategy

- ✓ Continue using owned and earned media to nurture lasting relationships with the community and ensure safety for Ready-to-Go travelers
- ✓ Create messaging for paid media that speaks to the new needs of consumers
- ✓ Prepare to inspire Travel Averse audiences as they look to reengage with travel planning activities
- ✓ Identify content opportunities to create flexible itineraries for any trip type  
(Road trip, day trip, weekend getaway, etc.)



# Prioritize Key Brand Features

- ✓ Emphasize the open-ended nature of the destination
- ✓ Showcase opportunities for outdoor recreation and fun while distancing
- ✓ Focus on activities and things to do that mitigate risk of spread

(Beach, sightseeing, kayaking, camping, water-based activities, etc.)



# Avoid Triggers

- ✓ Photography showing large crowds, crowded spaces or close physical interaction
- ✓ Speaking in a manner that could be perceived as tone deaf to the realities of the situation
- ✓ Parity across messaging and photography
- ✓ Calls-to-action to book now



# Align With Media

- ✓ Shift investment into drive markets over fly markets
- ✓ Continue to leverage contextual and audience-targeted display and search, effectively reaching people as they are actively seeking regional travel information and ideas
- ✓ Leverage native to educate audience on relevant destination asset types
- ✓ Invest in OTT and OOH located near essential services
- ✓ Keeping audience targeting flexible across types and interests



**1 WAIT**      **2 ACCLIMATE**      **3 CONSIDER**      **4 ESCAPE**

**Travel Truths**

Mass shutdowns and local quarantines

Lifting of some restrictions and realities of financial impact

**Traveler Mindset**

Adjusting to new norms; seeking outlets for the now

Returning to daily life with renewed caution

**Comms Objective**

Build lasting relationships with audience

Maintain top-of-mind awareness

**Messaging Strategy**

Emphasize safety and support of community

Reconcile the destination experience with new needs

**Desired Action**

Stay connected and optimistic

Learn more about our commitment to visitors



**1 WAIT**      **2 ACCLIMATE**      **3 CONSIDER**      **4 ESCAPE**

**Travel Truths**

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Emphasize safety and support of community

**Desired Action**

Stay connected and optimistic

**2 ACCLIMATE**

Lifting of some restrictions and realities of financial impact

Returning to daily life with renewed caution

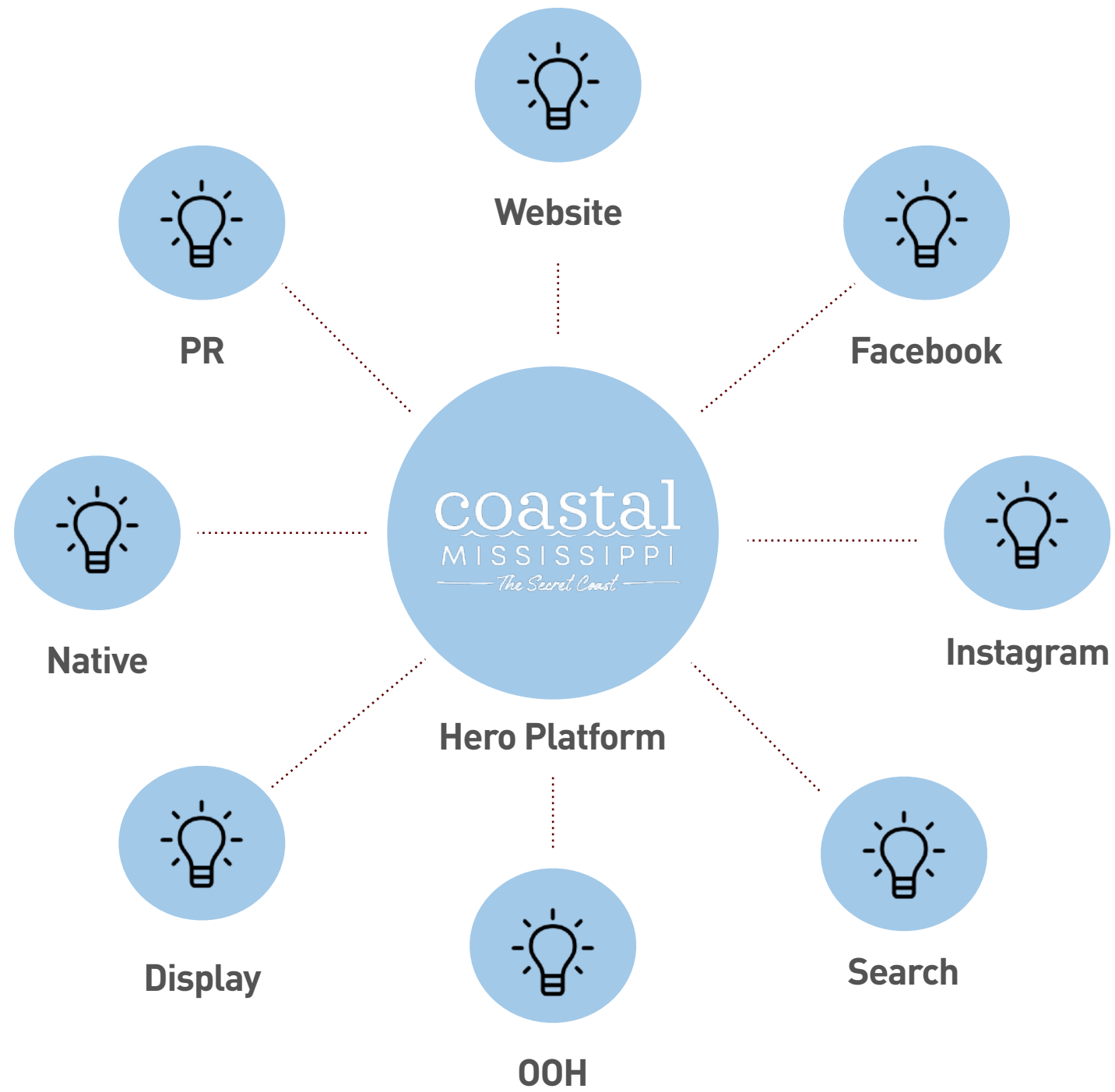
Maintain top-of-mind awareness

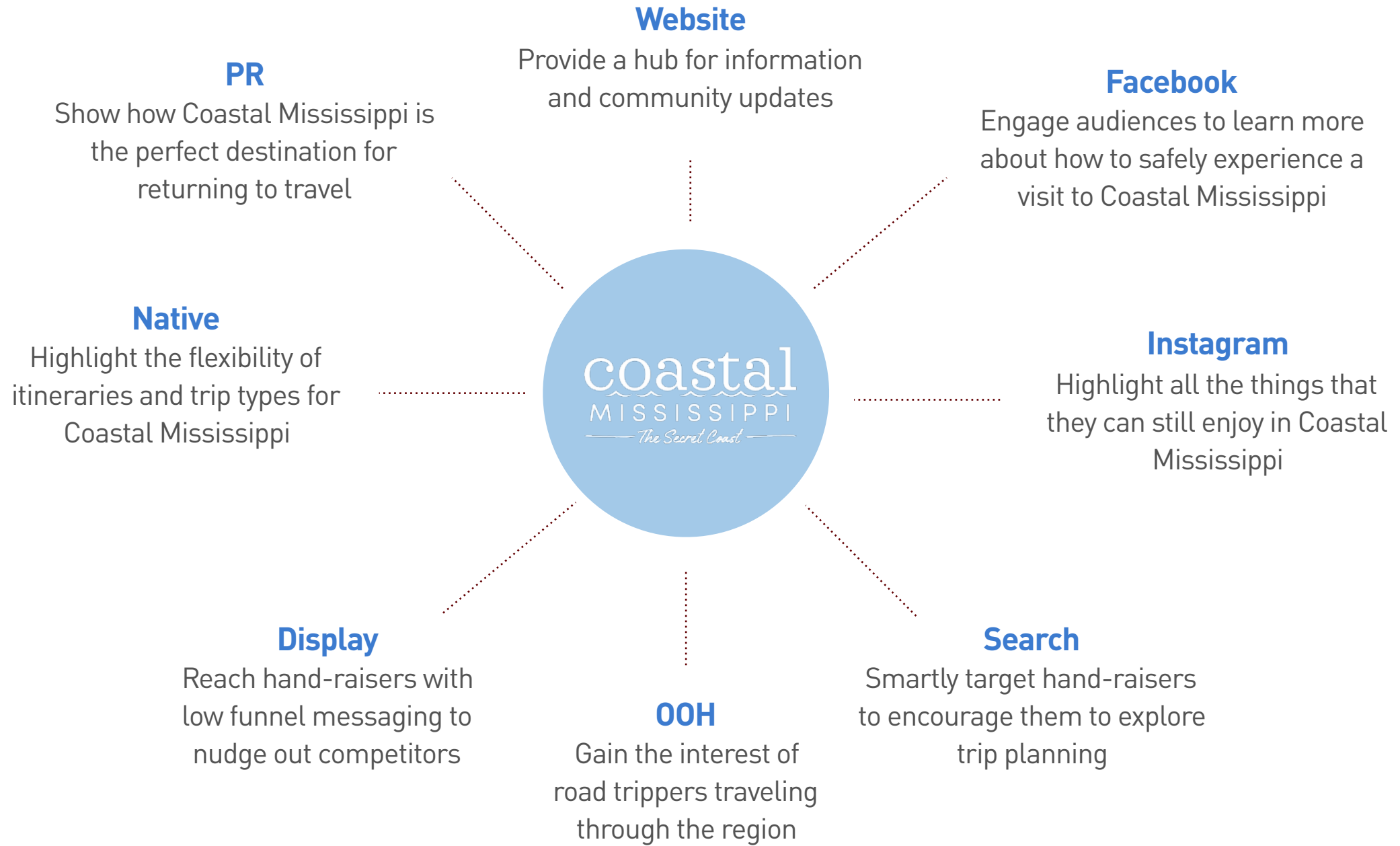
Reconcile the destination experience with new needs

Learn more about our commitment to visitors

**JUNE 15  
POTENTIAL LAUNCH**









# Recap for Approval:

- Brand role line
- Recommendation on messaging opportunities
- Refocused messaging objectives
- Adjustments to communications strategy
- Prioritization of brand features
- Triggers to be avoided in creative and communications development
- Alignment on considerations for media planning
- Alignment on Phase 1 and Phase 2



## Next Steps:

- Brief Creative team on development of Phase 2 assets
- Continue to monitor developments in destination readiness
- Track traveler sentiment and behavior through next wave of results
- Review strategic approach for summer media plan
- Discuss needs for Phase 3 and beyond





**Never Not Together**

**PETERMAYER**