



Coastal Mississippi Tourism Updates

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The Secret Coast

Mary Cracchiolo Spain, APR
Board of Commissioners
President

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Welcome

Impact of COVID-19 on Travel Industry:

- Travel spending is **down nearly \$500 billion**, costing the U.S. economy **\$1.1 trillion**.
- **The total number of travel-supported jobs fell by 34%**, from 17 million in 2019 to **just 11 million in 2020**.
- Prior to the pandemic, total travel-supported jobs accounted for 11% of the U.S. workforce, but in 2020, **total travel-supported jobs accounted for a staggering 65% of unemployment**.
- At our current pace, the industry is **not expected to fully recover until 2025**.
- Here in **Mississippi**, travel spending was down **26%**. Federal, state and local tax revenues declined by **20%**, which helps fund public programs.

Key Performance Indicators – February 2021 (12 MMA)

Coastal Mississippi Outperforms Total US

Indicator	*US	Mississippi	Coastal Mississippi
Room Supply	-3.6%	-0.6%	-6.2%
Room Demand	-35%	-17%	-15.5%
Occupancy	44% / -33.3%	48.8% / -16.5%	55.2% / -9.9%
ADR	\$103 / -21.3%	\$78 / -9.5%	\$84 / -8.2%
RevPAR	\$45 / -47.5%	\$38 / -24.4%	\$46 / -17.3%
Room Revenue	-49.9%	-24.9%	-22.4%

***As of December 2020**

Gulf Coast Girl



<https://vimeo.com/522936821> Click to view video

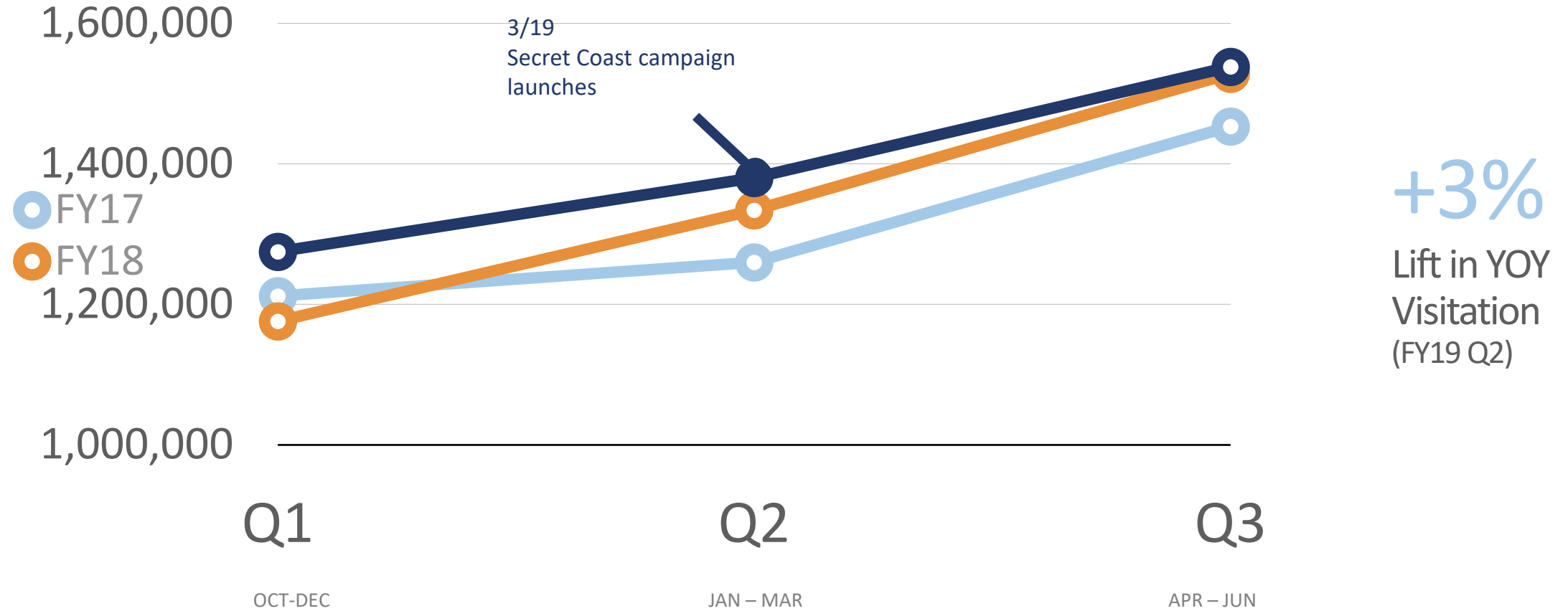
Milton Segarra, CDME CEO

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A Look Back

With the launch of our new brand, The Secret Coast, in 2019 - we saw demand rise year over year



But we had a few
challenges.



An aerial photograph showing a vast expanse of bright green algal bloom covering the coastal waters of the Gulf of Mexico. The bloom is dense and textured, with some areas appearing lighter green and others darker, possibly due to varying concentrations or the presence of other marine life. The coastline is visible as a dark, irregular line separating the green water from the land.

**Algae took over
the Gulf.**



**Four hurricanes bore
down on the Coast.**

And COVID-19 arrived.



**Despite that,
we never
skipped a
beat.**



Tourism Recovery Fund

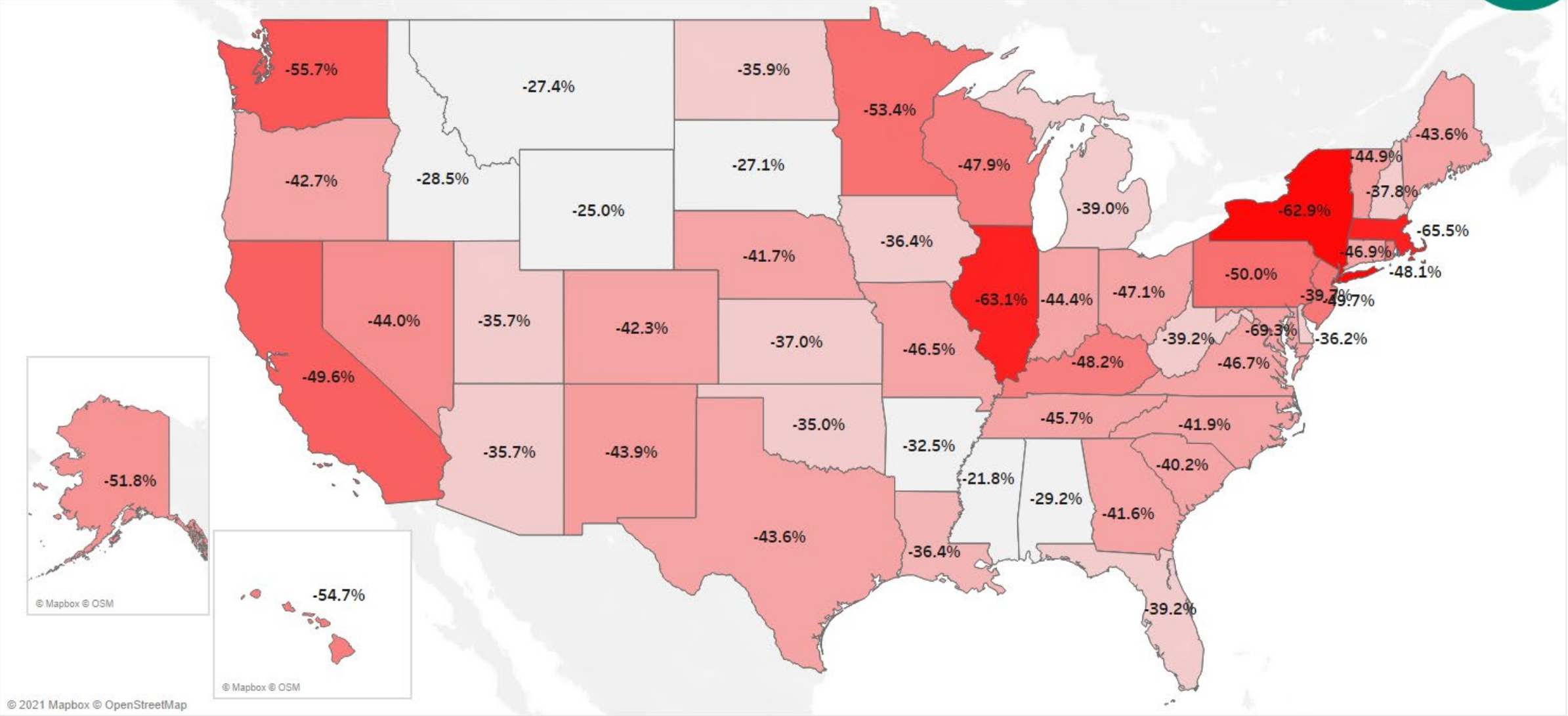
Thanks in part to the leadership and unwavering dedication displayed by our Coastal Delegation in passing the Tourism Recovery Fund, our destination received the tools and resources we needed to drive visitor demand and fuel recovery for our local communities and industry.

Coastal Mississippi was awarded **\$3.4 million** from the **CARES Act** for recovery initiatives. Through collaboration with talented agencies, staff, board of commissioners, community leaders, industry partners and research, we created the Coastal Mississippi Recovery Plan that would ignite visitation again.

Tourism Recovery Fund



2020 RevPAR Change - 50 States Heat Map



RevPAR % Change by State, YTD December 2020

Source: STR. 2021 © CoStar Realty Information, Inc.

A man and a woman are walking through a casino floor, smiling and holding hands. The woman is wearing a light blue blouse and dark jeans, and the man is wearing a light pink short-sleeved shirt and light-colored trousers. They are surrounded by numerous slot machines with bright, colorful displays. In the background, a sign for a "CASHIER" is visible. The floor has a patterned carpet.

2019 Travel USA Visitor Research

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Travel USA Visitor Profile

Day Visitors vs. Overnight Visitors

Total Size of Coastal Mississippi Day Domestic Travel Market

Total Person-Trips
14.2 Million
+5.1% v. 2017



Day
57% | 8.1 Million

Overnight
43% | 6.1 Million

Total Size of Coastal Mississippi 2019 Domestic Travel Market

Total Person-Trips
14.2 Million
+5.1% v 2017



Day
57% | 8.1 Million

Overnight
43% | 6.1 Million

Size of Coastal Mississippi Day Travel Market - Adults vs. Children

Total Day Person-Trips
8.1 Million



Adults
78% | 6.3 Million

Children
22% | 1.8 Million

Size of Coastal Mississippi Overnight Travel Market - Adults vs. Children

Total Overnight Person-Trips
6.1 Million



Adults
80% | 4.9 Million

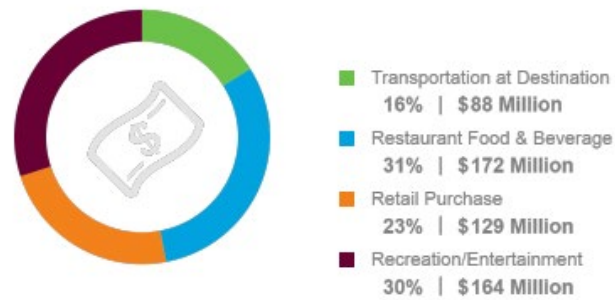
Children
20% | 1.2 Million

Travel USA Visitor Profile

Day Visitors vs. Overnight Visitors

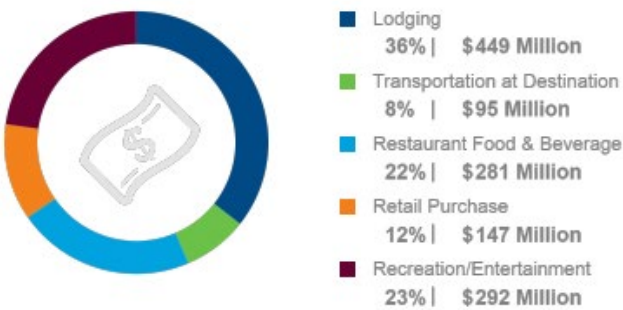
Domestic Day Expenditures - by Sector

Total Spending
\$553 Million
+9.9% v. 2017



Domestic Overnight Expenditures - by Sector

Total Spending
\$ 1.263 Billion
+8.2% v. 2017



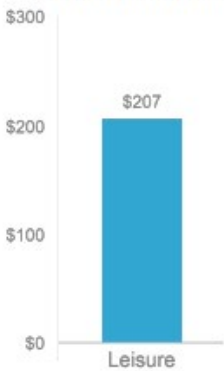
Average Per Person Expenditures
on Domestic Day Trips
- by Trip Purpose



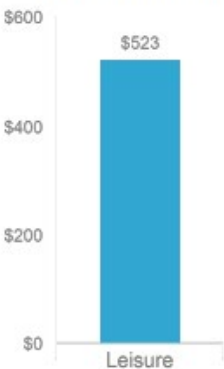
Average Per Party Expenditures
on Domestic Day Trips
- by Trip Purpose



Average Per Person Expenditures
on Domestic Overnight Trips
- by Trip Purpose



Average Per Party Expenditures
on Domestic Overnight Trips
- by Trip Purpose



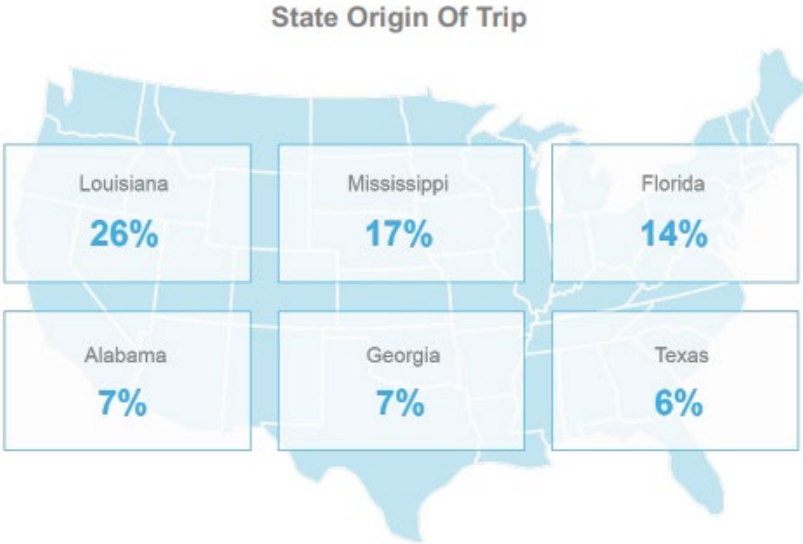
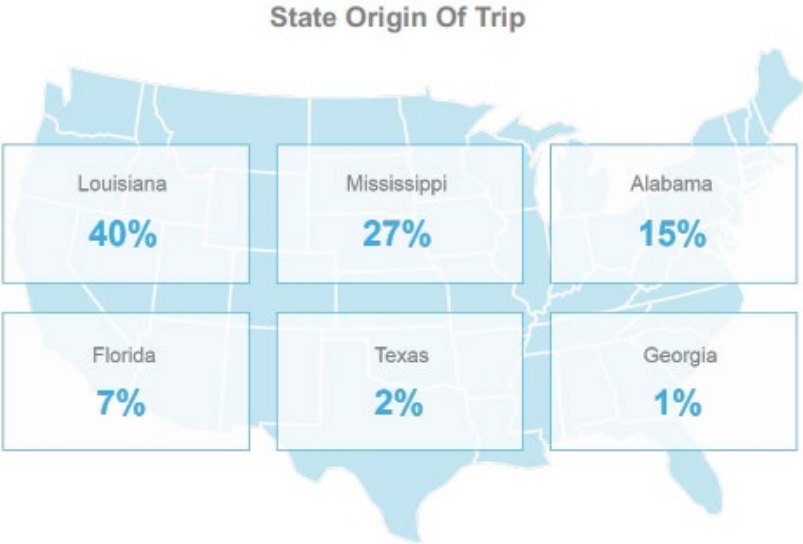
Travel USA Visitor Profile

Day Visitors vs. Overnight Visitors



Travel USA Visitor Profile

Day Visitors vs. Overnight Visitors



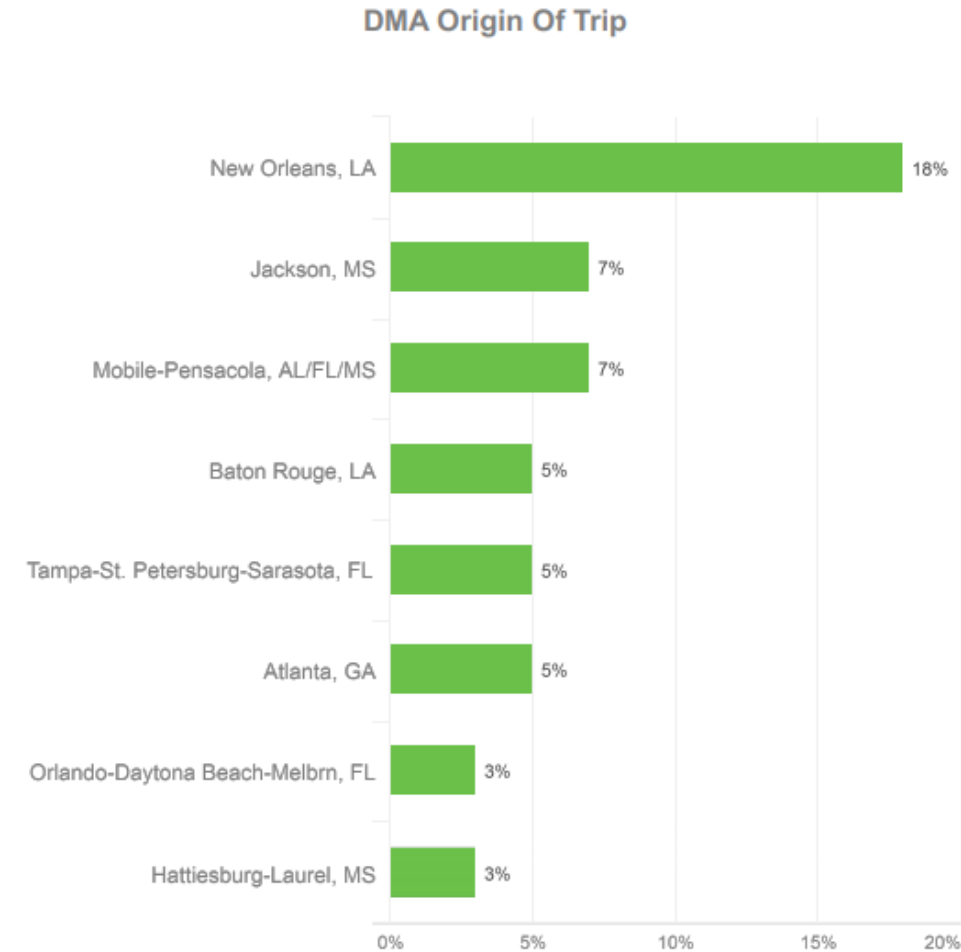
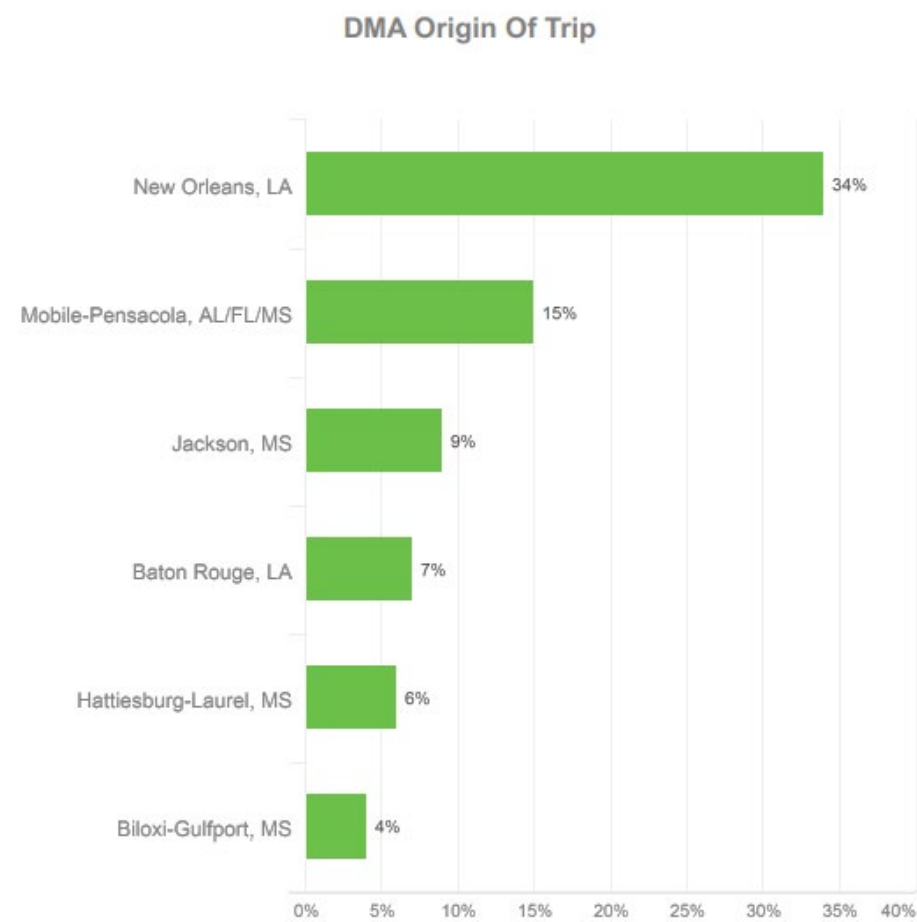
Season of Trip
Total Day Person-Trips
Data is for 2019 only



Season of Trip
Total Overnight Person-Trips

Travel USA Visitor Profile

Day Visitors vs. Overnight Visitors



Travel USA Visitor Profile

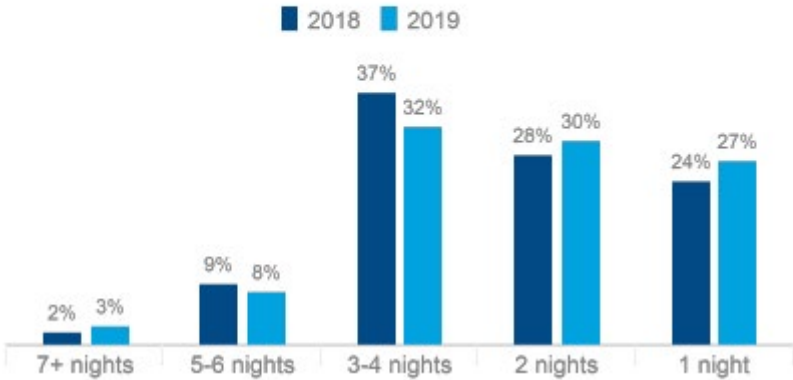
Overnight Visitors



Nights Spent in Coastal Mississippi

Average number of nights
2.6

Number of Nights Spent in Coastal Mississippi - Trended



Average in 2019
2.6
Nights

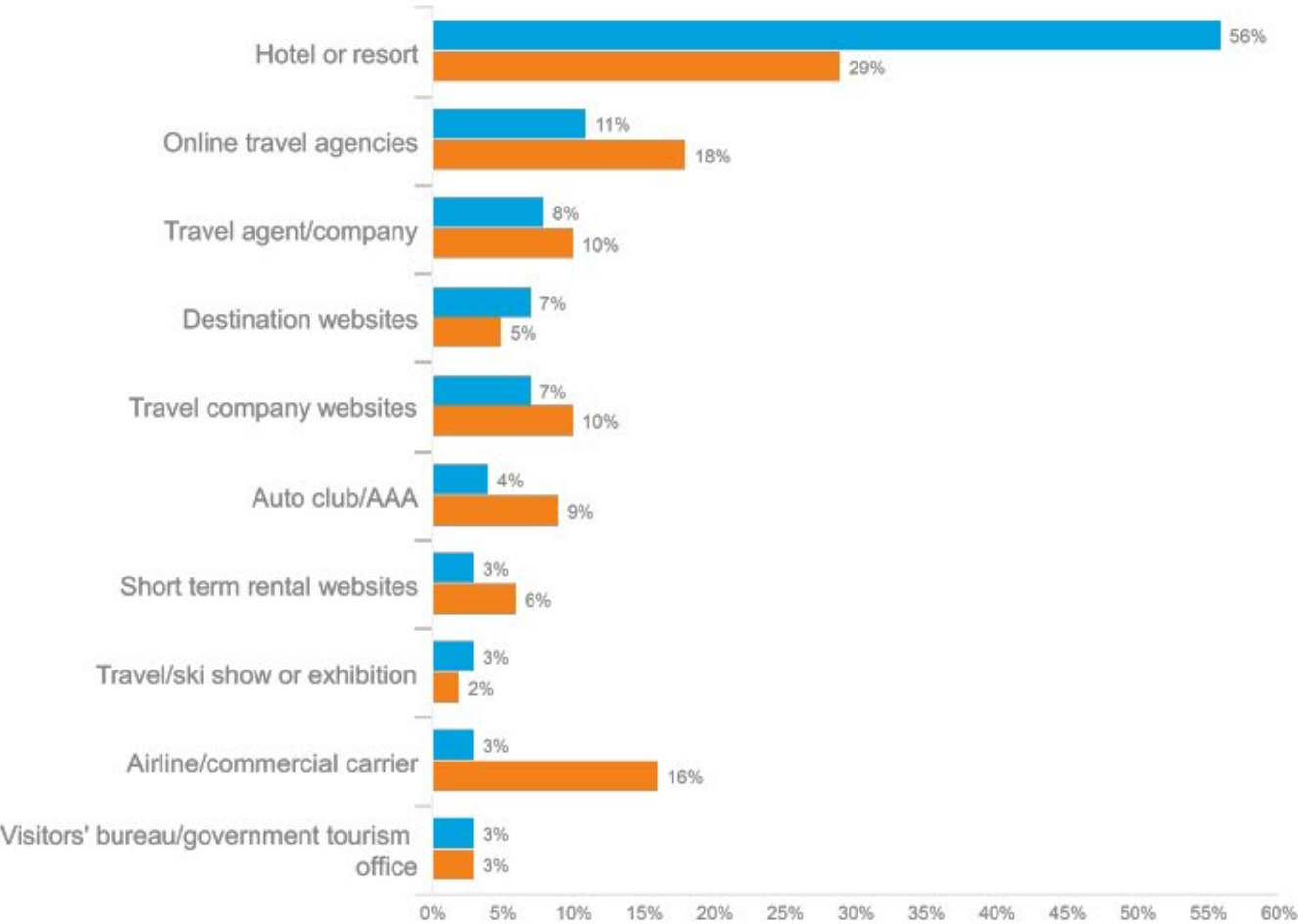
Average last year
2.7
Nights

Travel USA Visitor Profile

Overnight Visitors








Method of Booking

Coastal Mississippi U.S. Norm



Accommodations

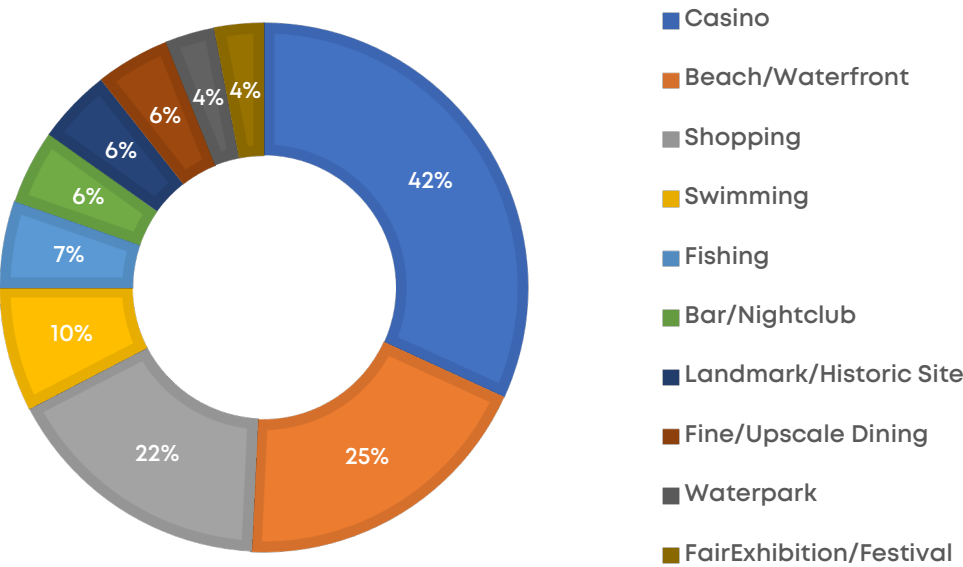
Coastal Mississippi U.S. Norm

	Resort hotel	58%	23%
	Motel	14%	16%
	Other hotel	13%	22%
	Home of friends or relatives	9%	22%
	Bed & breakfast	4%	5%
	Rented home / condo / apartment	4%	5%
	Campground / trailer park / RV park	3%	4%

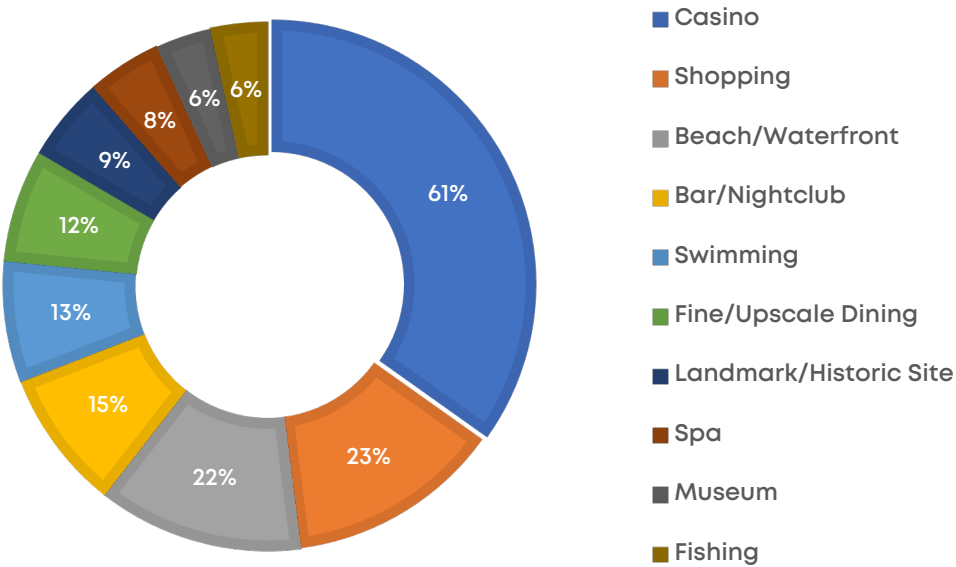
Travel USA Visitor Profile

Activities & Experiences

DAY VISITORS





















OVERNIGHT VISITORS



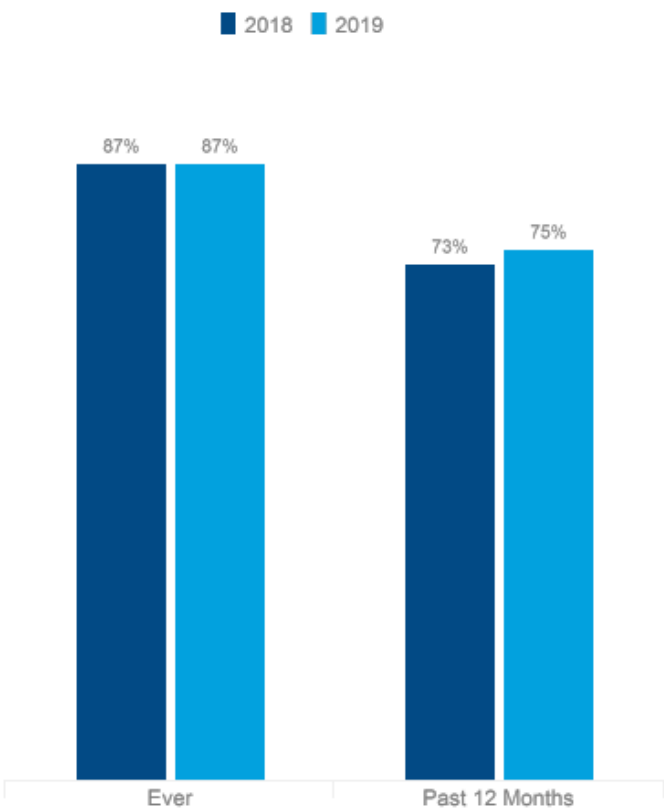
Travel USA Visitor Profile

Visitor Satisfaction

% Very Satisfied with Trip

	Overall trip experience		75%
	Friendliness of people		73%
	Safety and Security		72%
	Quality of accommodations		69%
	Quality of food		68%
	Value for money		65%
	Cleanliness		65%
	Sightseeing and attractions		54%
	Music/nightlife/entertainment		49%

Past Visitation to Coastal Mississippi





**2020
Destination
Analysts**

**Meetings Image &
Awareness Study**

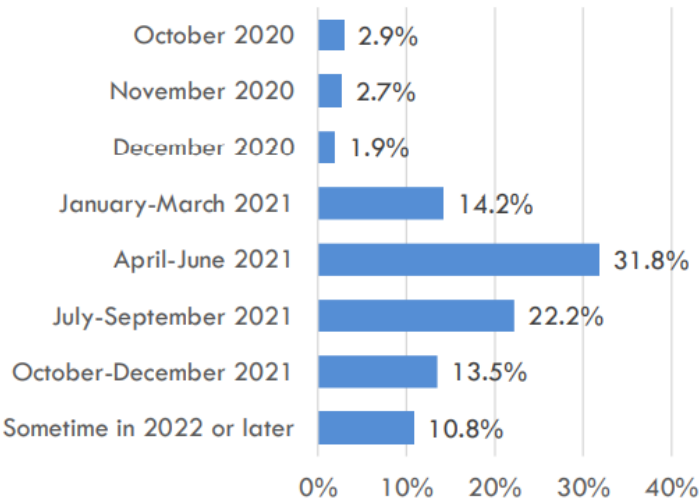
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Meetings Image & Awareness Study

Key Findings

EXPECTED RETURN OF LIVE EVENTS



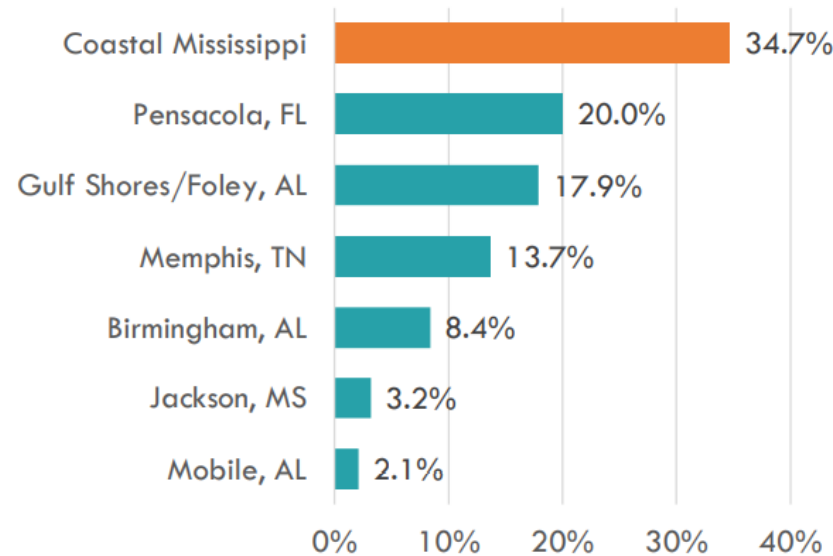
	Corporate	Association	Third party	Sports	Familiar	Not familiar	High frequency	Medium frequency	Low frequency
October 2020	2.0%	3.9%	1.9%	6.8%	2.1%	3.1%	5.1%	1.7%	1.4%
November 2020	2.0%	0.0%	5.6%	5.7%	6.3%	1.6%	5.7%	0.0%	1.4%
December 2020	1.0%	1.6%	1.9%	3.4%	3.2%	1.6%	1.3%	3.4%	1.4%
January – March 2021	10.9%	12.4%	20.4%	20.5%	17.9%	13.1%	15.2%	15.5%	12.1%
April – June 2021	33.7%	32.6%	33.3%	23.9%	31.6%	31.9%	31.0%	38.8%	27.0%
July – September 2021	27.7%	27.1%	14.8%	21.6%	16.8%	23.8%	21.5%	23.3%	22.0%
October - December 2021	12.9%	12.4%	12.0%	13.6%	13.7%	13.4%	12.7%	12.1%	15.6%
Sometime in 2022 or later	9.9%	10.1%	10.2%	4.5%	8.4%	11.6%	7.6%	5.2%	19.1%
Base	101	129	108	88	95	320	158	116	141

Question: Which month would you say is the soonest you will consider holding live events again? (Select one) Base: All respondents. 415 responses.

Meetings Image & Awareness Study

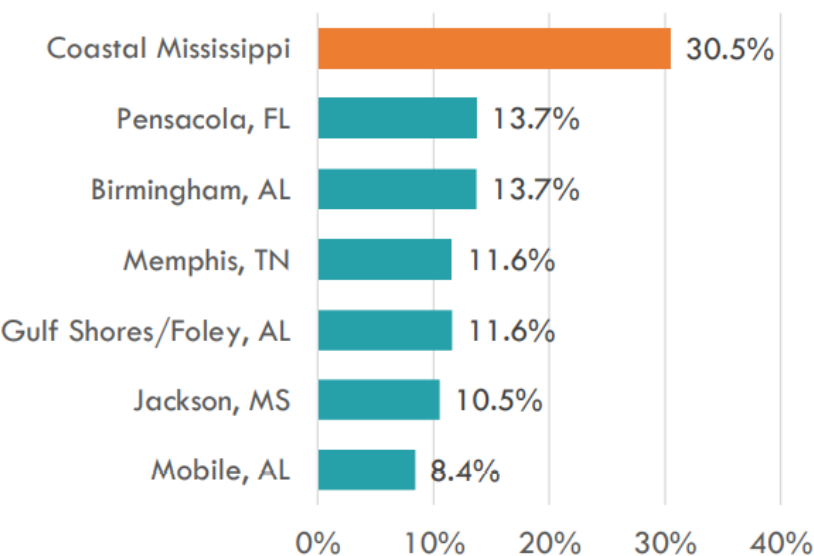
COASTAL MS VS. COMPETITIVE SET (FAMILIAR PLANNERS)

Best Destination for Incentive Meetings



Question: Of the destinations you just evaluated, which is best for each of the following? Incentive Meetings. Base: Planners familiar with Coastal MS. 95 responses.

Best Destination for SMERF Meetings

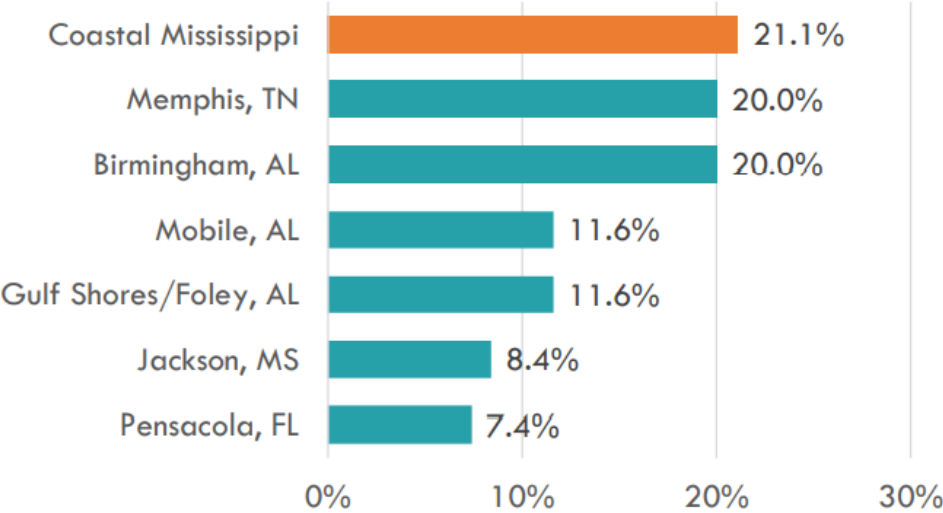


Question: Of the destinations you just evaluated, which is best for each of the following? SMERF Meetings. Base: Planners familiar with Coastal MS. 95 responses.

Meetings Image & Awareness Study

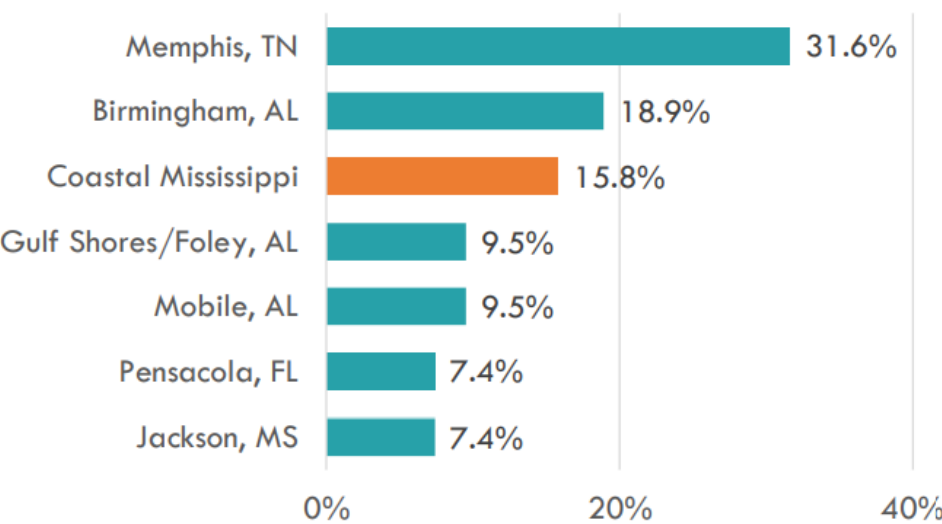
COASTAL MS VS. COMPETITIVE SET (FAMILIAR PLANNERS)

Best Destination for Association Meetings



Question: Of the destinations you just evaluated, which is best for each of the following?
Association Meetings. Base: Planners familiar with Coastal MS. 95 responses.

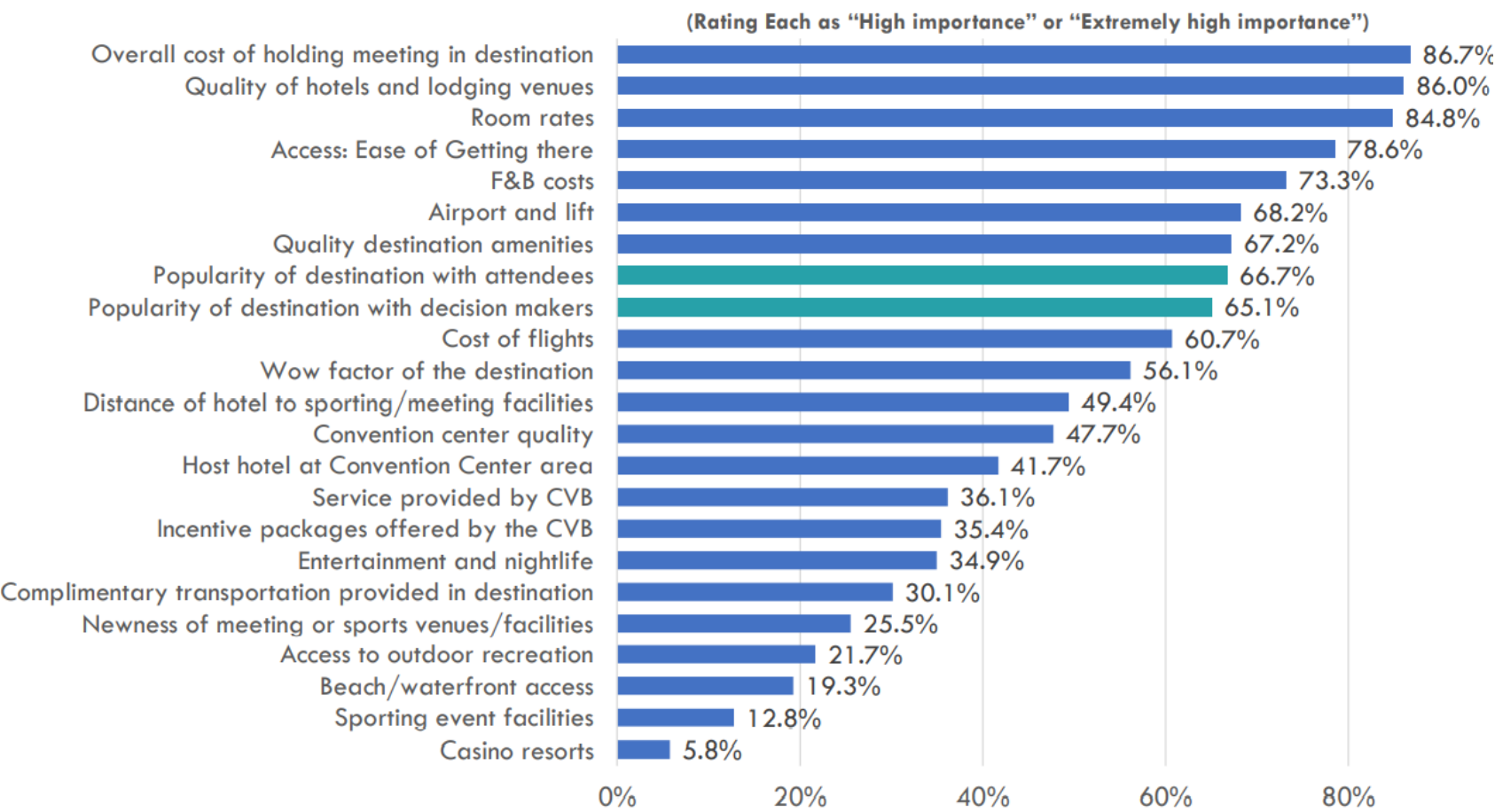
Best Destination for Corporate Meetings



Question: Of the destinations you just evaluated, which is best for each of the following?
SMERF Meetings. Base: Planners familiar with Coastal MS. 95 responses.

Meetings Image & Awareness Study

ATTRIBUTES IMPORTANT TO MEETINGS DESTINATION SELECT



Meetings Image & Awareness Study

TOP-OF-MIND DESCRIPTIONS OF COASTAL MISSISSIPPI

Coastal MS is typically described as a “desirable/enjoyable destination” that is “beautiful,” “accessible” and “budget friendly” amongst those familiar with the destination. Familiar planners also often cited experiential offerings in the destination such as outdoor recreational opportunities, casinos and relaxing atmosphere. In contrast, those unfamiliar with the destination were more likely to cite “weather concerns” and “not easily accessible,” however Coastal MS is also seen as an “attractive” destination with “outdoor recreational opportunities” which is particularly attractive during the pandemic era.

Figure 22: Top-of-Mind Descriptions of Coastal Mississippi



Question: How would you describe the Coastal Mississippi area and its key assets as a meetings and/or sports destination? Please feel welcome to be as descriptive as possible. Base: All non-sports meeting planner respondents. 235 responses.

A photograph of three people (two women and one man) sitting at a bar, enjoying food and drinks. The woman on the left is smiling and holding a piece of food. The man in the middle is laughing and holding a knife. The woman on the right is smiling and holding a piece of food. They are surrounded by trays of food, including ribs, corn, and bread, and a glass of beer. The background shows a bar with various items on shelves.

**2020
University
of Southern
Mississippi**

**Resident Sentiment
Towards Tourism**

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Resident Sentiment Study

2,138 residents surveyed



Average age of 54 years old
Range: 18-87 years



Average years living
on the coast:
28 years
Range: 2 months - 83 years



82% white



59% women



58%
Bachelor's degree or higher



49% Employed Full-time
28% Retired



62% married



40% living in
2-person household



Average annual income of
\$75,000 to \$99,000



88% do not work
in tourism industry

Resident Sentiment Study

When asked to describe tourism in the region, respondents said:



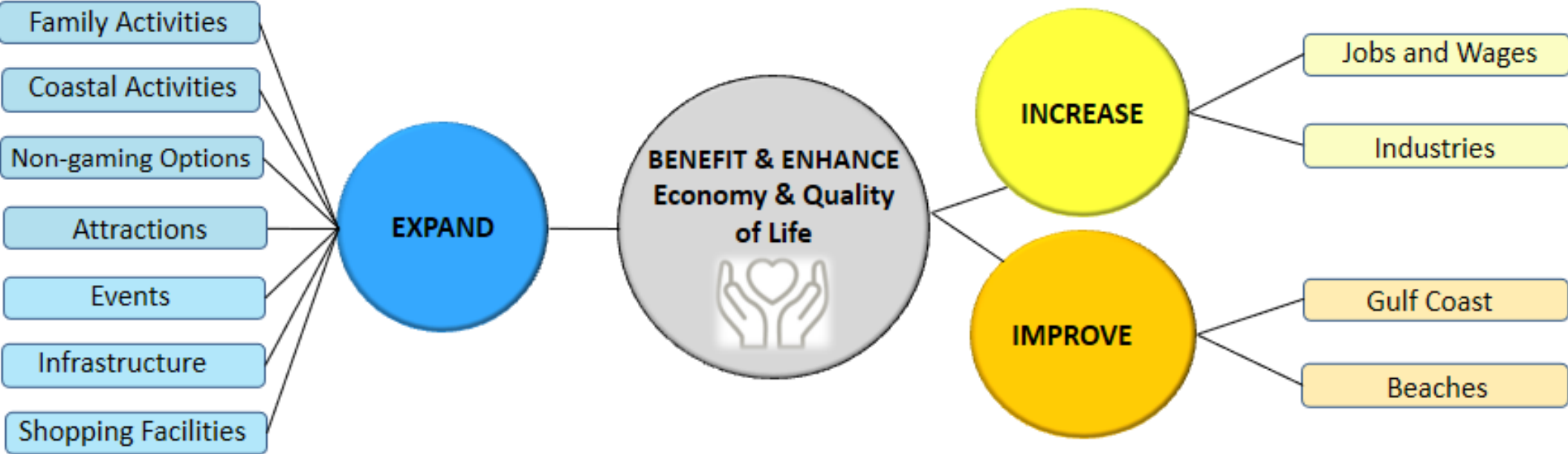
"I feel that it is growing but we have room for improvement. Would like to see more facilities (non casinos) built to attract a larger variety of tourists, i.e. more venues for conventions, tournaments, etc. We have a beautiful coastline. We need to take advantage of it."

"We have so many amazing attractions and dining options, but most people don't realize we're even here."

"A work in progress..."

Resident Sentiment Study

When asked how can tourism be improved to benefit the local economy and enhance your quality of life:



Resident Sentiment Study

When asked about the efficiency of tourism and the awareness of the destination overall:

93%
of respondents

are in favor of tourism on
the MS Gulf Coast

"...Tourism is
what keeps the
coast growing."



92%
of respondents

are aware of Coastal Mississippi

"We have so many
amazing attractions
and dining options, but
most people don't realize
we're even here."

Resident Sentiment Study

Key Takeaways:

- Residents are *enthusiastic about the impact of tourism and tourism growth*.
- Perceptions that *tourism enhances quality of life* is strong.
- Generally, residents report that the *benefits of tourism outweigh negative impacts*.
- The majority of residents report *awareness of Coastal Mississippi* and that they are *doing a good job*.
- Regarding COVID-19, residents report an *eagerness to welcome visitors to the MS Gulf Coast*.
- Overall, perceptions of tourism on the MS Gulf Coast are positive, but residents offer *opportunities for improvement*.

A man and a woman are walking a golden retriever on a sandy beach. The man is on the left, wearing a white t-shirt, a blue and white checkered shirt over his shoulders, and khaki shorts. He is holding a blue leash attached to the dog. The woman is on the right, wearing a grey zip-up hoodie over a green top and blue jeans. She is smiling and looking towards the man. The dog is a golden retriever, standing on the sand. In the background, there are gentle waves on the beach under a hazy sky. A dark teal diagonal banner is in the bottom left corner, containing white text.

**2020
Longwoods
International**

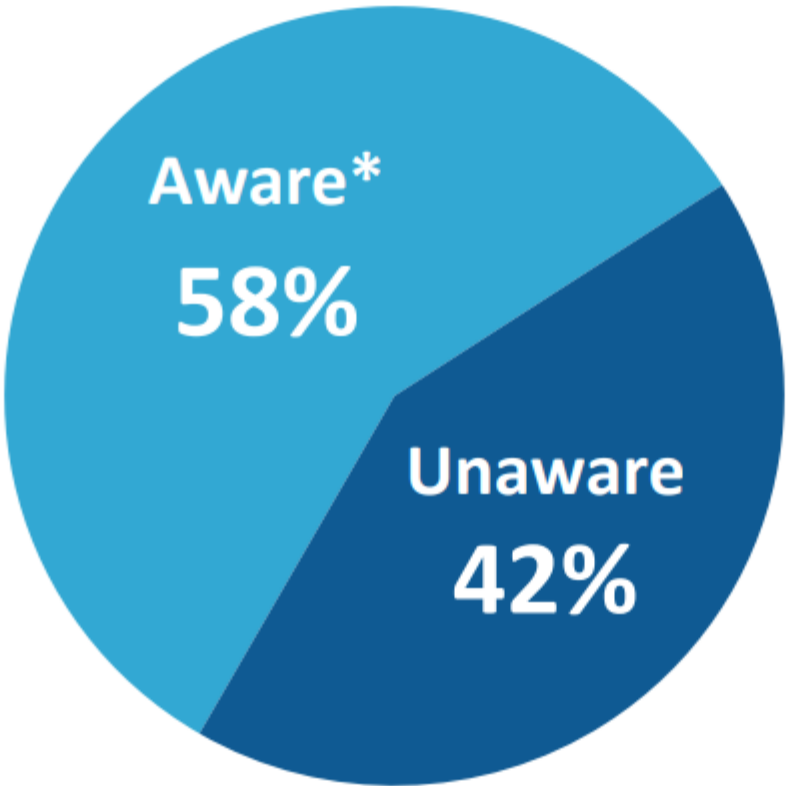
**Awareness & Visitation
COVID-19 Impact Study**

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Brand Awareness Study

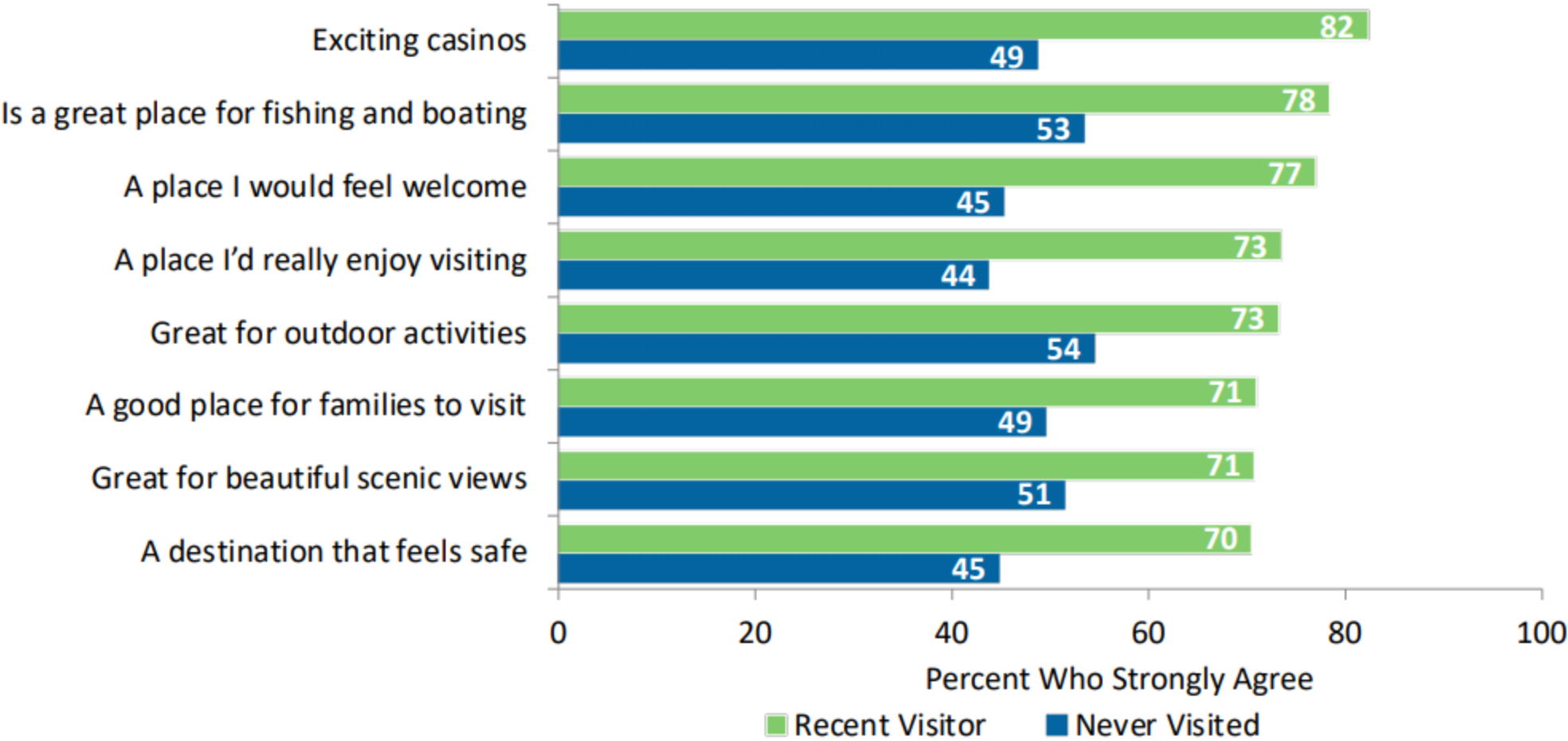
Base: Residents of Coastal Mississippi's Regional Advertising Markets



*Saw at least one ad

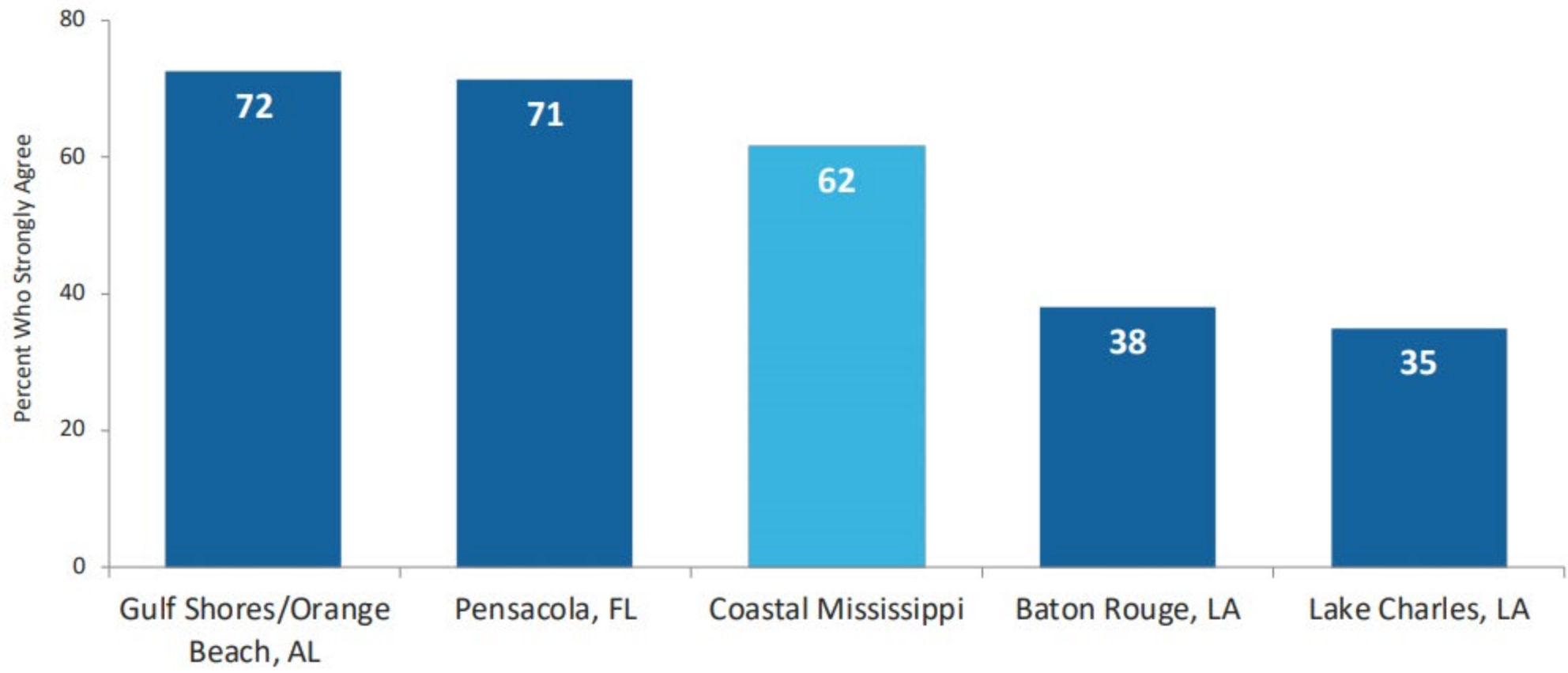
Brand Awareness Study

Image by Visitation



Brand Awareness Study

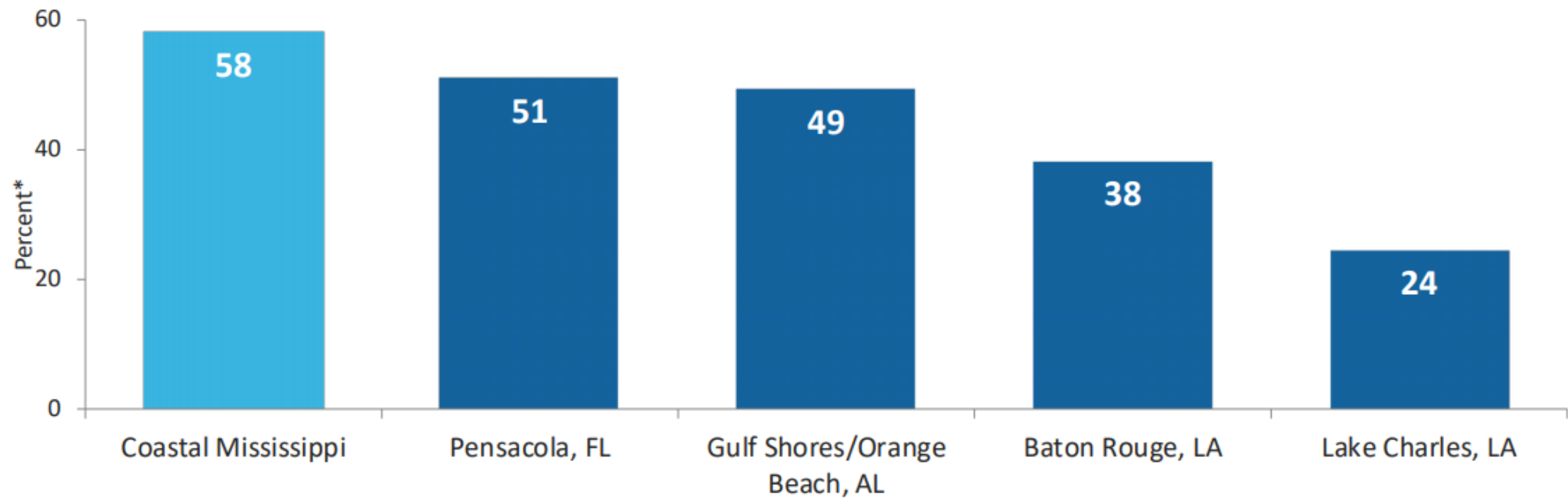
Coastal Mississippi Overall Image vs. Competition – “A Place I Would Really Enjoy Visiting”



Brand Awareness Study

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



Looking Ahead

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Coastal Mississippi's Approach to 2021

We have a strong foundation to build on thanks to the success of our marketing efforts over the last year

High Ad Recall & Awareness

Over half of travelers in our drive markets recalled seeing at least one ad from the Strikethrough or COVID-centric campaigns with over 50% awareness across all of our markets.

Positive Brand Perception

Both campaigns had a positive impact on travelers' perceptions of the destination, as travelers exposed to the campaign gave Coastal Mississippi substantially higher ratings than those unfamiliar across all image statements

Strong Intent to Visit

Over half of travelers in our drive markets intend to take an overnight or day leisure trip to Coastal Mississippi in the next 18 months, out performing all other destinations in our competitive set

Strong Repeat Visitation

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.

Tourism Recovery Fund 2.0



Thank You

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