Mary Cracchiolo Spain, APR
Board of Commissioners
President
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

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

*As of December 2020*
Gulf Coast Girl

https://vimeo.com/522936821 Click to view video
With the launch of our new brand, The Secret Coast, in 2019 - we saw demand rise year over year.

A Look Back

Source: Smith Travel (Hotel), MS Gaming Commission Hotel Data (Casino), AirDNA (Short-Term Rentals)
But we had a few challenges.
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
Travel USA Visitor Profile

**Day Visitors vs. Overnight Visitors**

Total Size of Coastal Mississippi Day Domestic Travel Market

- Total Person-Trips: 14.2 Million
  - 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
  - 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

- Transportation at Destination: 10% | $88 Million
- Restaurant Food & Beverage: 31% | $172 Million
- Retail Purchase: 23% | $129 Million
- Recreation/Entertainment: 30% | $164 Million

Domestic Overnight Expenditures - by Sector

Total Spending
$1.263 Billion
+8.2% v. 2017

- Lodging: 38% | $449 Million
- Transportation at Destination: 8% | $95 Million
- Restaurant Food & Beverage: 22% | $281 Million
- Retail Purchase: 12% | $147 Million
- Recreation/Entertainment: 23% | $292 Million

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

- Leisure: $68

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

- Leisure: $184

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

- Leisure: $207

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

- Leisure: $523
### Travel USA Visitor Profile

#### Day Visitors vs. Overnight Visitors

<table>
<thead>
<tr>
<th>Main Purpose of Trip</th>
<th>25%</th>
<th>Main Purpose of Trip</th>
<th>20%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting friends/relatives</td>
<td>25%</td>
<td>Visiting friends/relatives</td>
<td>20%</td>
</tr>
<tr>
<td>Casino</td>
<td>30%</td>
<td>Casino</td>
<td>49%</td>
</tr>
<tr>
<td>City trip</td>
<td>7%</td>
<td>Special event</td>
<td>7%</td>
</tr>
<tr>
<td>Shopping</td>
<td>7%</td>
<td>Touring</td>
<td>5%</td>
</tr>
<tr>
<td>Touring</td>
<td>7%</td>
<td>Other business trip</td>
<td>3%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>6%</td>
<td>Other business trip</td>
<td>2%</td>
</tr>
<tr>
<td>Resort</td>
<td>5%</td>
<td>Business-Leisure</td>
<td>2%</td>
</tr>
<tr>
<td>Special event</td>
<td>5%</td>
<td>Business-Leisure</td>
<td>2%</td>
</tr>
</tbody>
</table>
Travel USA Visitor Profile

Day Visitors vs. Overnight Visitors

State Origin Of Trip

- Louisiana: 40%
- Mississippi: 27%
- Alabama: 15%
- Florida: 7%
- Texas: 2%
- Georgia: 1%

State Origin Of Trip

- Louisiana: 26%
- Mississippi: 17%
- Florida: 14%
- Alabama: 7%
- Georgia: 7%
- Texas: 6%

Season of Trip
Total Day Person-Trips

- Jan - Mar: 24%
- Apr - Jun: 23%
- Jul - Sep: 29%
- Oct - Dec: 23%

Season of Trip
Total Overnight Person-Trips

- Jan - Mar: 22%
- Apr - Jun: 25%
- Jul - Sep: 29%
- Oct - Dec: 25%
Travel USA Visitor Profile

Day Visitors vs. Overnight Visitors

DMA Origin Of Trip

New Orleans, LA: 34%
Mobile-Pensacola, AL/FL/MS: 15%
Jackson, MS: 9%
Baton Rouge, LA: 7%
Hattiesburg-Laurel, MS: 6%
Biloxi-Gulfport, MS: 4%

DMA Origin Of Trip

New Orleans, LA: 18%
Jackson, MS: 7%
Mobile-Pensacola, AL/FL/MS: 7%
Baton Rouge, LA: 5%
Tampa-St. Petersburg-Sarasota, FL: 5%
Atlanta, GA: 5%
Orlando-Daytona Beach-Melbo, FL: 3%
Hattiesburg-Laurel, MS: 3%
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

<table>
<thead>
<tr>
<th>Method of Booking</th>
<th>Coastal Mississippi</th>
<th>U.S. Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel or resort</td>
<td>20%</td>
<td>56%</td>
</tr>
<tr>
<td>Online travel agencies</td>
<td>11%</td>
<td>18%</td>
</tr>
<tr>
<td>Travel agent/company</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>Destination websites</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>Travel company websites</td>
<td>7%</td>
<td>10%</td>
</tr>
<tr>
<td>Auto club/AAA</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Short term rental websites</td>
<td>3%</td>
<td>6%</td>
</tr>
<tr>
<td>Travel/ski show or exhibition</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Airline/commercial carrier</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Visitors' bureau/government tourism office</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Accommodations

<table>
<thead>
<tr>
<th>Accommodation</th>
<th>Coastal Mississippi</th>
<th>U.S. Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resort hotel</td>
<td>58%</td>
<td>23%</td>
</tr>
<tr>
<td>Motel</td>
<td>14%</td>
<td>16%</td>
</tr>
<tr>
<td>Other hotel</td>
<td>13%</td>
<td>22%</td>
</tr>
<tr>
<td>Home of friends or relatives</td>
<td>9%</td>
<td>22%</td>
</tr>
<tr>
<td>Bed &amp; breakfast</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Rented home / condo / apartment</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Campground / trailer park / RV park</td>
<td>3%</td>
<td>4%</td>
</tr>
</tbody>
</table>
Travel USA Visitor Profile

Activities & Experiences

**DAY VISITORS**
- Casino: 42%
- Beach/Waterfront: 25%
- Shopping: 22%
- Swimming: 6%
- Fishing: 6%
- Bar/Nightclub: 4%
- Landmark/Historic Site: 4%
- Fine/Upscale Dining: 6%
- Waterpark: 6%
- FairExhibition/Festival: 7%

**OVERNIGHT VISITORS**
- Casino: 61%
- Shopping: 13%
- Beach/Waterfront: 9%
- Bar/Nightclub: 6%
- Swimming: 6%
- Fine/Upscale Dining: 6%
- Landmark/Historic Site: 12%
- Waterpark: 15%
- FairExhibition/Festival: 22%
- Museum: 23%
- Spa: 6%
- Fishing: 4%

---

Coastal Mississippi
The Secret Coast
Longwoods International
## Travel USA Visitor Profile

### Visitor Satisfaction

<table>
<thead>
<tr>
<th>% Very Satisfied with Trip</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall trip experience</td>
</tr>
<tr>
<td>Friendliness of people</td>
</tr>
<tr>
<td>Safety and Security</td>
</tr>
<tr>
<td>Quality of accommodations</td>
</tr>
<tr>
<td>Quality of food</td>
</tr>
<tr>
<td>Value for money</td>
</tr>
<tr>
<td>Cleanliness</td>
</tr>
<tr>
<td>Sightseeing and attractions</td>
</tr>
<tr>
<td>Music/nighlife/entertainment</td>
</tr>
</tbody>
</table>

### Past Visitation to Coastal Mississippi

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ever</td>
<td>87%</td>
<td>87%</td>
</tr>
<tr>
<td>Past 12 Months</td>
<td>73%</td>
<td>75%</td>
</tr>
</tbody>
</table>
2020 Destination Analysts
Meetings Image & Awareness Study
# Meetings Image & Awareness Study

## Key Findings

### Expected Return of Live Events

<table>
<thead>
<tr>
<th></th>
<th>Corporate</th>
<th>Association</th>
<th>Third party</th>
<th>Sports</th>
<th>Familiar</th>
<th>Not familiar</th>
<th>High frequency</th>
<th>Medium frequency</th>
<th>Low frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>October 2020</td>
<td>2.0%</td>
<td>3.9%</td>
<td>1.9%</td>
<td>6.8%</td>
<td>2.1%</td>
<td>3.1%</td>
<td>5.1%</td>
<td>1.7%</td>
<td>1.4%</td>
</tr>
<tr>
<td>November 2020</td>
<td>2.0%</td>
<td>0.0%</td>
<td>5.6%</td>
<td>5.7%</td>
<td>6.3%</td>
<td>1.6%</td>
<td>5.7%</td>
<td>0.0%</td>
<td>1.4%</td>
</tr>
<tr>
<td>December 2020</td>
<td>1.0%</td>
<td>1.6%</td>
<td>1.9%</td>
<td>3.4%</td>
<td>3.2%</td>
<td>1.6%</td>
<td>1.3%</td>
<td>3.4%</td>
<td>1.4%</td>
</tr>
<tr>
<td>January – March 2021</td>
<td>10.9%</td>
<td>12.4%</td>
<td>20.4%</td>
<td>20.5%</td>
<td>17.9%</td>
<td>13.1%</td>
<td>15.2%</td>
<td>15.5%</td>
<td>12.1%</td>
</tr>
<tr>
<td>April – June 2021</td>
<td>33.7%</td>
<td>32.6%</td>
<td>33.3%</td>
<td>23.9%</td>
<td>31.6%</td>
<td>31.9%</td>
<td>31.0%</td>
<td>38.8%</td>
<td>27.0%</td>
</tr>
<tr>
<td>July – September 2021</td>
<td>27.7%</td>
<td>27.1%</td>
<td>14.8%</td>
<td>21.6%</td>
<td>16.8%</td>
<td>23.8%</td>
<td>21.5%</td>
<td>23.3%</td>
<td>22.0%</td>
</tr>
<tr>
<td>October – December 2021</td>
<td>12.9%</td>
<td>12.4%</td>
<td>12.0%</td>
<td>13.6%</td>
<td>13.7%</td>
<td>13.4%</td>
<td>12.7%</td>
<td>12.1%</td>
<td>15.6%</td>
</tr>
<tr>
<td>Sometime in 2022 or later</td>
<td>9.9%</td>
<td>10.1%</td>
<td>10.2%</td>
<td>4.3%</td>
<td>8.4%</td>
<td>11.6%</td>
<td>7.6%</td>
<td>5.2%</td>
<td>19.1%</td>
</tr>
<tr>
<td>Base</td>
<td>101</td>
<td>129</td>
<td>108</td>
<td>88</td>
<td>95</td>
<td>320</td>
<td>158</td>
<td>116</td>
<td>141</td>
</tr>
</tbody>
</table>

**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

- Coastal Mississippi: 34.7%
- Pensacola, FL: 20.0%
- Gulf Shores/Foley, AL: 17.9%
- Memphis, TN: 13.7%
- Birmingham, AL: 8.4%
- Jackson, MS: 3.2%
- Mobile, AL: 2.1%

Best Destination for SMERF Meetings

- Coastal Mississippi: 30.5%
- Pensacola, FL: 13.7%
- Birmingham, AL: 13.7%
- Memphis, TN: 11.6%
- Gulf Shores/Foley, AL: 11.6%
- Jackson, MS: 10.5%
- Mobile, AL: 8.4%

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.

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**

<table>
<thead>
<tr>
<th>Destination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coastal Mississippi</td>
<td>21.1%</td>
</tr>
<tr>
<td>Memphis, TN</td>
<td>20.0%</td>
</tr>
<tr>
<td>Birmingham, AL</td>
<td>20.0%</td>
</tr>
<tr>
<td>Mobile, AL</td>
<td>11.6%</td>
</tr>
<tr>
<td>Gulf Shores/Foley, AL</td>
<td>11.6%</td>
</tr>
<tr>
<td>Jackson, MS</td>
<td>8.4%</td>
</tr>
<tr>
<td>Pensacola, FL</td>
<td>7.4%</td>
</tr>
</tbody>
</table>

**Best Destination for Corporate Meetings**

<table>
<thead>
<tr>
<th>Destination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Memphis, TN</td>
<td>31.6%</td>
</tr>
<tr>
<td>Birmingham, AL</td>
<td>18.9%</td>
</tr>
<tr>
<td>Coastal Mississippi</td>
<td>15.8%</td>
</tr>
<tr>
<td>Gulf Shores/Foley, AL</td>
<td>9.5%</td>
</tr>
<tr>
<td>Mobile, AL</td>
<td>9.5%</td>
</tr>
<tr>
<td>Pensacola, FL</td>
<td>7.4%</td>
</tr>
<tr>
<td>Jackson, MS</td>
<td>7.4%</td>
</tr>
</tbody>
</table>

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.

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.

Coastal Mississippi | The Secret Coast

Destination Analysts
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

Familiar with Coastal Mississippi

Unfamiliar with Coastal Mississippi

Questions: 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.
2020 University of Southern Mississippi

Resident Sentiment Towards Tourism

coastal
MISSISSIPPI
The Secret Coast
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:

EXPAND

- Family Activities
- Coastal Activities
- Non-gaming Options
- Attractions
- Events
- Infrastructure
- Shopping Facilities

BENEFIT & ENHANCE Economy & Quality of Life

INCREASE

- Jobs and Wages
- Industries

IMPROVE

- Gulf Coast
- Beaches
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.
Brand Awareness Study

Base: Residents of Coastal Mississippi’s Regional Advertising Markets

Aware* 58%

Unaware 42%

*Saw at least one ad
Brand Awareness Study
Image by Visitation

- Exciting casinos
  - Recent Visitor: 49%
  - Never Visited: 82%
- Is a great place for fishing and boating
  - Recent Visitor: 53%
  - Never Visited: 78%
- A place I would feel welcome
  - Recent Visitor: 45%
  - Never Visited: 77%
- A place I’d really enjoy visiting
  - Recent Visitor: 44%
  - Never Visited: 73%
- Great for outdoor activities
  - Recent Visitor: 54%
  - Never Visited: 73%
- A good place for families to visit
  - Recent Visitor: 54%
  - Never Visited: 71%
- Great for beautiful scenic views
  - Recent Visitor: 51%
  - Never Visited: 71%
- A destination that feels safe
  - Recent Visitor: 45%
  - Never Visited: 70%

Percent Who Strongly Agree

- Recent Visitor
- Never Visited
Brand Awareness Study

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

![Bar chart showing percent who strongly agree]

- Gulf Shores/Orange Beach, AL: 72%
- Pensacola, FL: 71%
- Coastal Mississippi: 62%
- Baton Rouge, LA: 38%
- Lake Charles, LA: 35%
Brand Awareness Study

Intent to Visit Destination in the Next 18 Months

Base: Residents of Coastal Mississippi’s Regional Advertising Markets

- Coastal Mississippi: 58%
- Pensacola, FL: 51%
- Gulf Shores/Orange Beach, AL: 49%
- Baton Rouge, LA: 38%
- Lake Charles, LA: 24%

*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
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