



Mississippi Gulf Coast 2017 Awareness and Image Research

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Background and Purpose

- Longwoods International was retained to undertake an evaluation of the Mississippi Gulf Coast's image.
- The research was designed to provide strategic image data:
 - ✓ What are the image factors and attributes that are important in destination selection?
 - ✓ What is the Mississippi Gulf Coast's image as a travel destination versus Gulf Shores/Orange Beach, AL, Pensacola/Florida Panhandle, Daytona Beach, FL, Tampa/St. Petersburg, FL, Virginia Beach, VA.
- This information would be used to provide guidance for future advertising messaging, positioning and branding efforts.

Research Objectives

- The objectives of the research were to :
 - ✓ Measure awareness of Mississippi Gulf Coast ads.
 - ✓ Measure the Mississippi Gulf Coast's image, overall and in detail, relative to its competition.
 - ✓ Identify the relative importance of image factors/attributes in getting on the destination wish list.
 - ✓ Measure awareness of Mississippi Gulf Coast ads.

Method

- An image study was conducted after the conclusion of the advertising period to measure awareness of specific ads and the impact of advertising awareness image.

- ✓ A national self-completion survey of 1,000 respondents in the advertising markets, distributed as follows:

Outer Markets	225
Inner Markets	225
Midwest	300
Fly Markets	250

- ✓ Respondents are members of a major online consumer research panel.
- ✓ Adults 18 years of age and older were randomly selected from the panel, so as to ensure a representative sample.

Method (Cont'd)

- ✓ The survey took an average of 25 minutes to complete.
- ✓ During the survey respondents were shown copies of the advertising materials, including video files of media-rich ads. This was done at the end of the survey so as not to bias earlier questions on attitudes towards Visit Mississippi Gulf Coast and other behavioral measures.
- ✓ The fieldwork was conducted in October 2017.
- Data were weighted on key demographic variables (region, age, sex, household income) prior to analysis to ensure that results are representative of and projectable to the traveler population in specific DMAs.
- For a sample of this size, the confidence level is + / – 3.1%, 19 times out of 20.



Conclusions and Recommendations

Conclusions and Recommendations

- A quadrant analysis is a useful tool to assess Mississippi Gulf Coast's image. In combination with other analyses, it helps us identify a brand's/destination's optimal positioning and most motivating messaging. A quadrant analysis plots the image attributes evaluated in this study in terms of your strengths and weaknesses versus how important those attributes are to travelers as they decide which destinations make it onto their "wish list."
- The normal interpretation of a quadrant analysis like this is as follows:
 - ✓ Important strengths should form the core of positioning/messaging.
 - ✓ Important weaknesses – communications are needed to correct misperceptions.
 - ✓ Less important strengths – can add depth to the story, as "features."
 - ✓ Less important weaknesses – low priority from a communications standpoint.

Conclusions and Recommendations

- The results of this research reveal some significant competitive challenges for the positioning of the Mississippi Gulf Coast in the travel marketplace:
 - ✓ Unlike its main competition, the Mississippi Gulf Coast is not thought to have any unique strengths that would differentiate it from its tourism rivals.
 - ✓ Although Mississippi Gulf Coast does share some strengths with other destinations, most of those strengths are relatively unimportant at the wish list stage of destination selection.
 - ✓ And Mississippi Gulf Coast is believed to fall short of other potential destinations in key hot button areas.

Conclusions and Recommendations

- Specifically, relative to competitors evaluated in this research and on the broad range of attributes included, Mississippi Gulf Coast does not come out ahead of the competition on any single image aspect.
- Nonetheless, Mississippi Gulf Coast does have a few important strengths on which it shares the lead with others:
 - ✓ Being considered an exciting place.
 - ✓ Offering a comfortable atmosphere with warm, friendly people.
 - ✓ Unspoiled and beautiful natural scenery.
- Mississippi Gulf Coast has several less important shared strengths:
 - ✓ Excellent fishing.
 - ✓ Viewing wildlife/birds.
 - ✓ Affordability both in terms of getting there/proximity as well as once there(dining, accommodations).
 - ✓ Safety.

Conclusions and Recommendations

- Versus the competitive set, Mississippi Gulf Coast has several important weaknesses:
 - ✓ Provides a unique vacation experience.
 - ✓ Sense of adventure.
 - ✓ The sightseeing experience, including lots of things to see and do, truly beautiful scenery, beautiful gardens and parks, interesting cities and towns.
 - ✓ A place I would feel welcome.
 - ✓ Good place for families to visit, children would especially enjoy.
 - ✓ First class hotels/resorts.

Conclusions and Recommendations

- Less important weaknesses of the Mississippi Gulf Coast are:
 - ✓ Great for golfers.
 - ✓ Great shopping.
 - ✓ Well known destination.
 - ✓ Great spectator sports venues.

- After completing the quadrant analysis, we examined “product delivery”, i.e., the effect of visitation on image. We did this by comparing the ratings of people who had never visited Mississippi Gulf Coast, i.e., pure image, versus the ratings of those who had visited recently. The objective here was to determine whether actual experience improves on or falls short of perceptions, and therefore whether you can safely talk about something without fear of overpromise.

Conclusions and Recommendations

- The good news is that Mississippi Gulf Coast image's is greatly affected by visitation. Once a traveler has visited Mississippi Gulf Coast, their opinion of the state soars.
 - In comparison to most destinations that we have measured over the years, visitation to Mississippi Gulf Coast has a far greater effect on perceptions.
 - For the typical destination we generally see improvements in ratings in the order of 10-15% for a few dimensions, but mainly lower shifts created by visitation.
 - In contrast, for Mississippi Gulf Coast, the shifts reach between 20 and 43% for many attributes including major drivers of destination interest.
- These shifts tell us that people are genuinely surprised when they come to the region, and suggest that the main issue is lack of awareness, not product absence or shortcomings.

Conclusions and Recommendations

- Another beneficial outcome of visitation by tourists is positive impacts on your image with respect to economic development. On every individual aspect tested in this research (ranging from being thought of as great place to live to starting a career or business in the state), visitation significantly improved people's image of Mississippi Gulf Coast.
- When we look across all of these measures, we conclude that:
 - ✓ The core positioning for Mississippi Gulf Coast should be excitement.
 - ✓ It is one of the most important drivers of destination interest in your competitive set.
 - ✓ Even though you are not leading yet in this area, you are considered the equal of others in top spot, and your visitors are saying that you can talk about excitement without fear of overpromise, because you are delivering on it.

Conclusions and Recommendations

- Although your imagery identifies some high points like unspoiled natural scenery, fishing, safe/friendly/comfortable atmosphere, etc., the excitement message needs to be developed around and supported by more than singular features:
 - ✓ to reinforce the important notion of “lots to see and do”
 - ✓ and to counter areas of image weakness, particularly regarding family suitability and uniqueness
- Resist the temptation to focus singularly on the outdoor experience, since it is far lower in importance than excitement and more urban aspects of travel.
- Incorporating images of your natural scenic beauty plus urban pursuits, and other unique/interesting aspects of your tourism product would help you convey the excitement and variety themes, while choice of actors and situations/scripting can help reinforce your friendly, safe atmosphere and family orientation.



Main Findings: Advertising Impacts

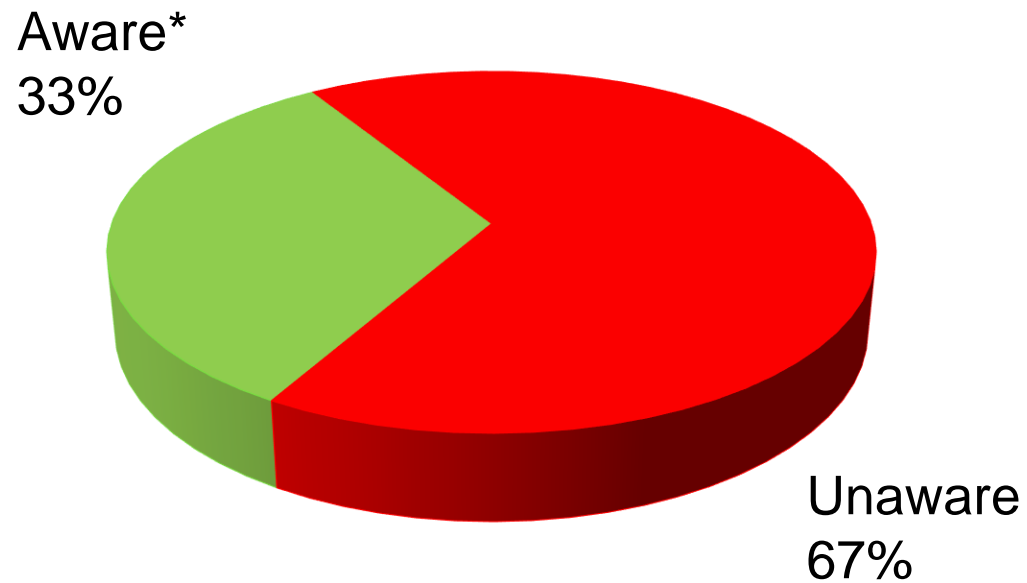


Advertising Awareness

Advertising Awareness

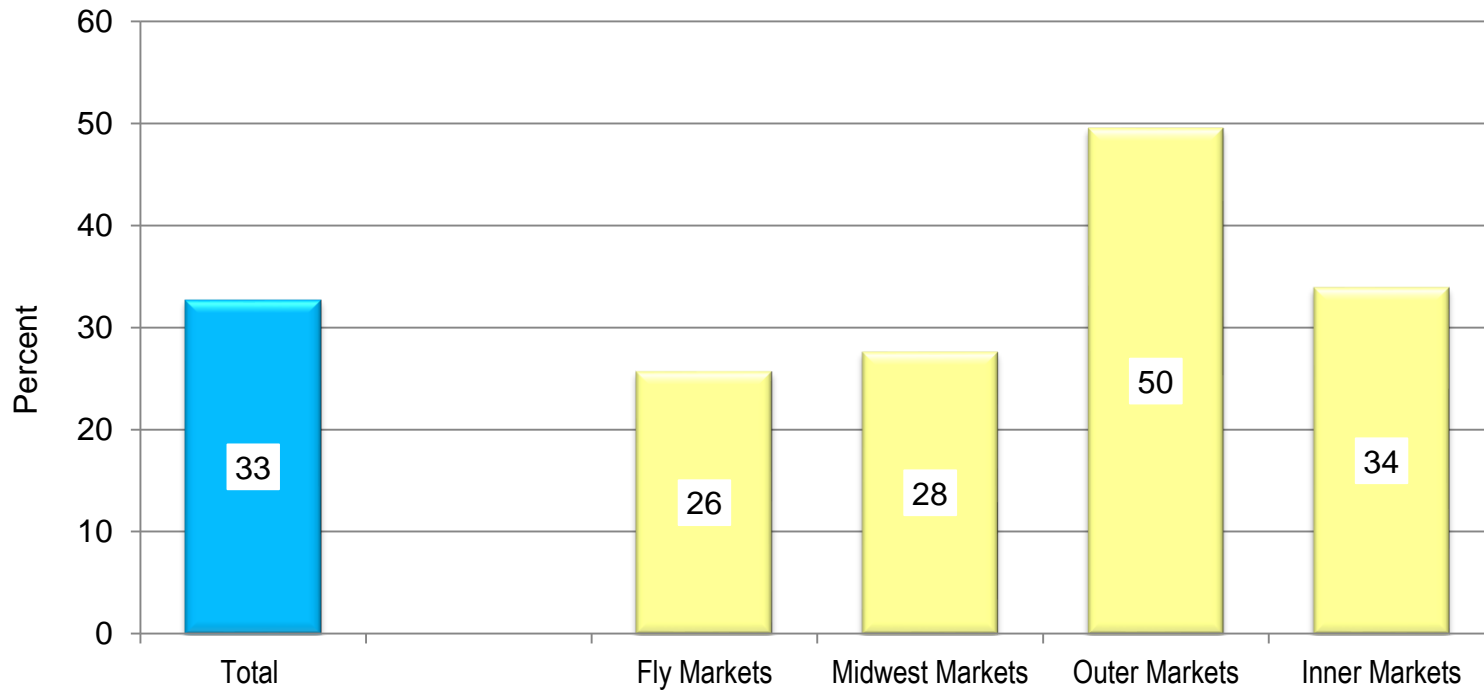
- Approximately one third (33%) of travelers in Visit Mississippi Gulf Coast's core markets recalled seeing at least one Visit Mississippi Gulf Coast tourism ad among the ads they were exposed to in the survey.
- Ad awareness was higher among older markets than newer markets, especially the "Outer" markets. Markets that received television had much higher awareness than non-television markets. Those markets that received digital advertising had higher awareness than non-digital market, but the differences were not as large as television.
- In the markets where television was shown, television had the highest awareness among the various mediums (49%). For the markets where digital ads were shown, the awareness was 27%. All markets received print and social media, the awareness was 24% and 18% respectfully.
- The ads with the highest level of recall were the television ads of "Oyster" and "Bonfire."

Awareness of the Ad Campaign



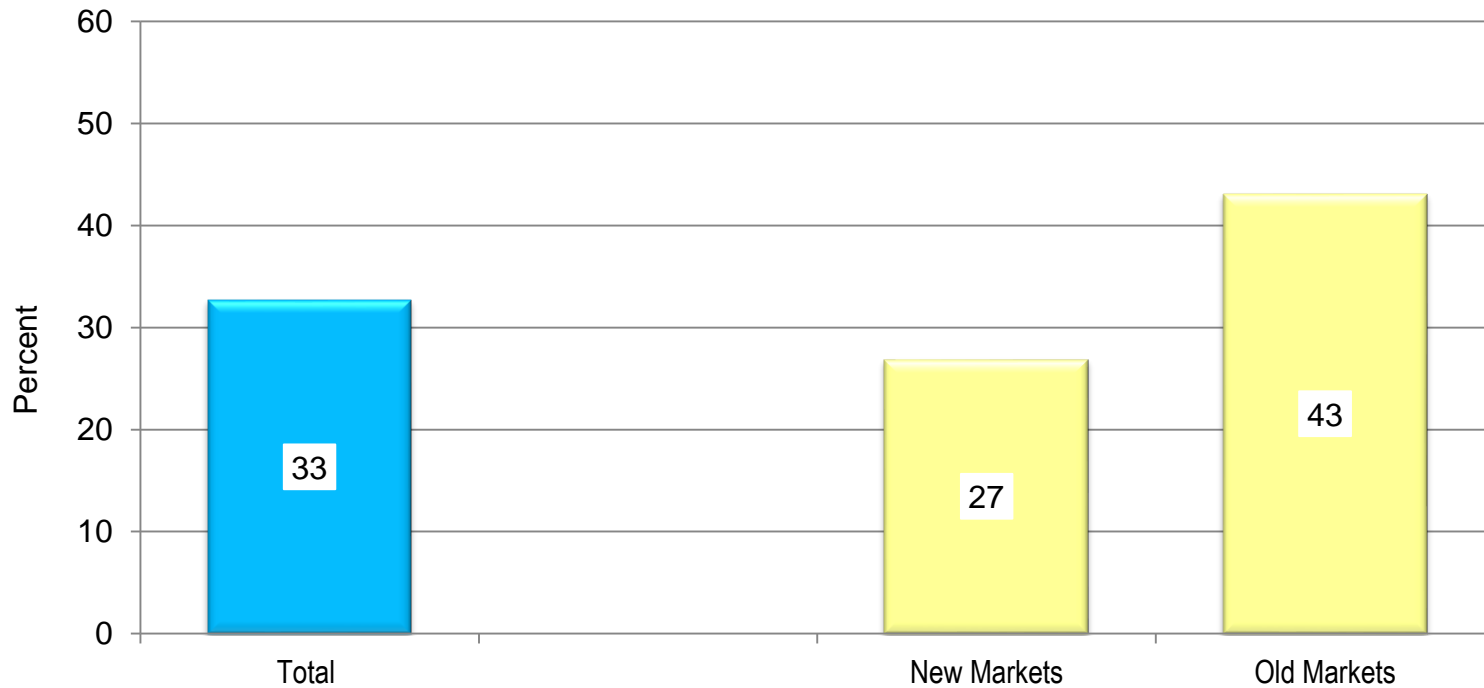
*Saw at least one ad

Awareness* by Market



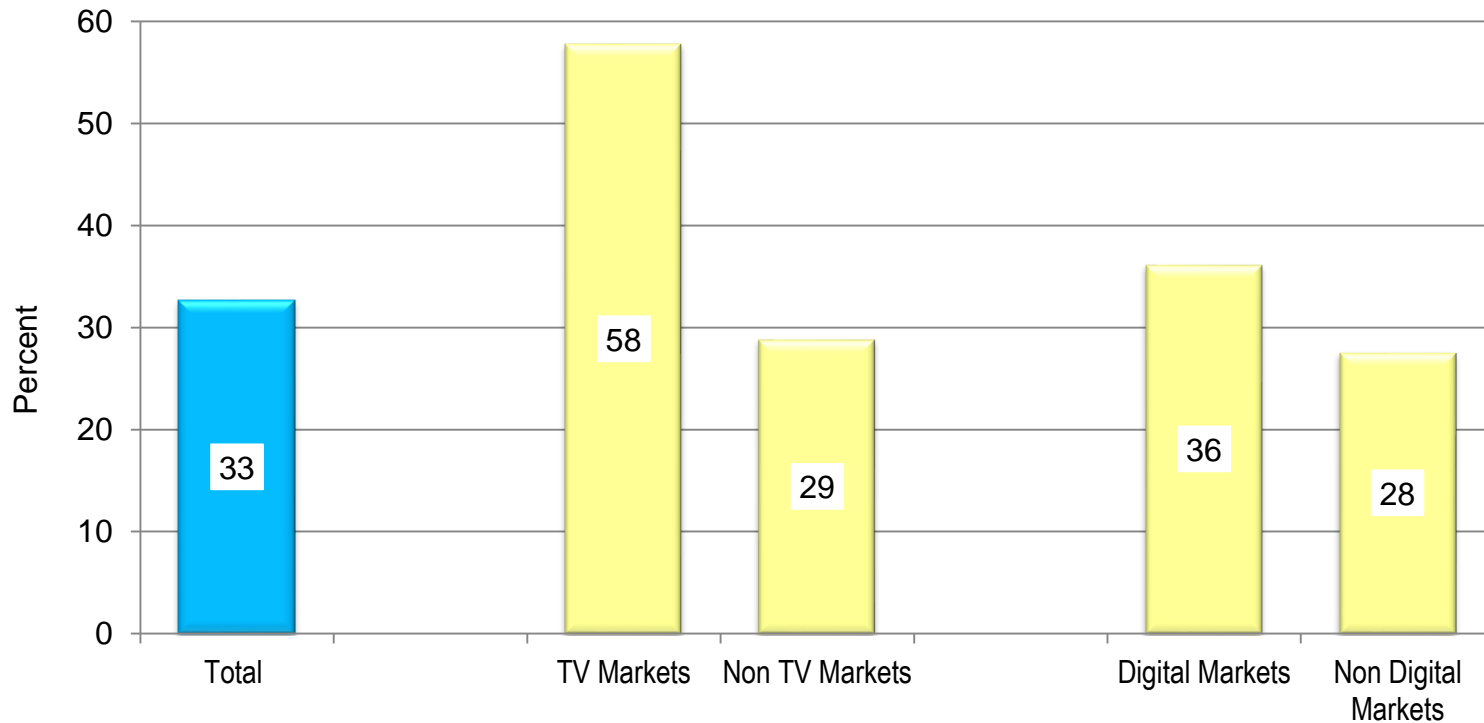
*Saw at least one ad

Awareness* by Market – by Age of Advertising



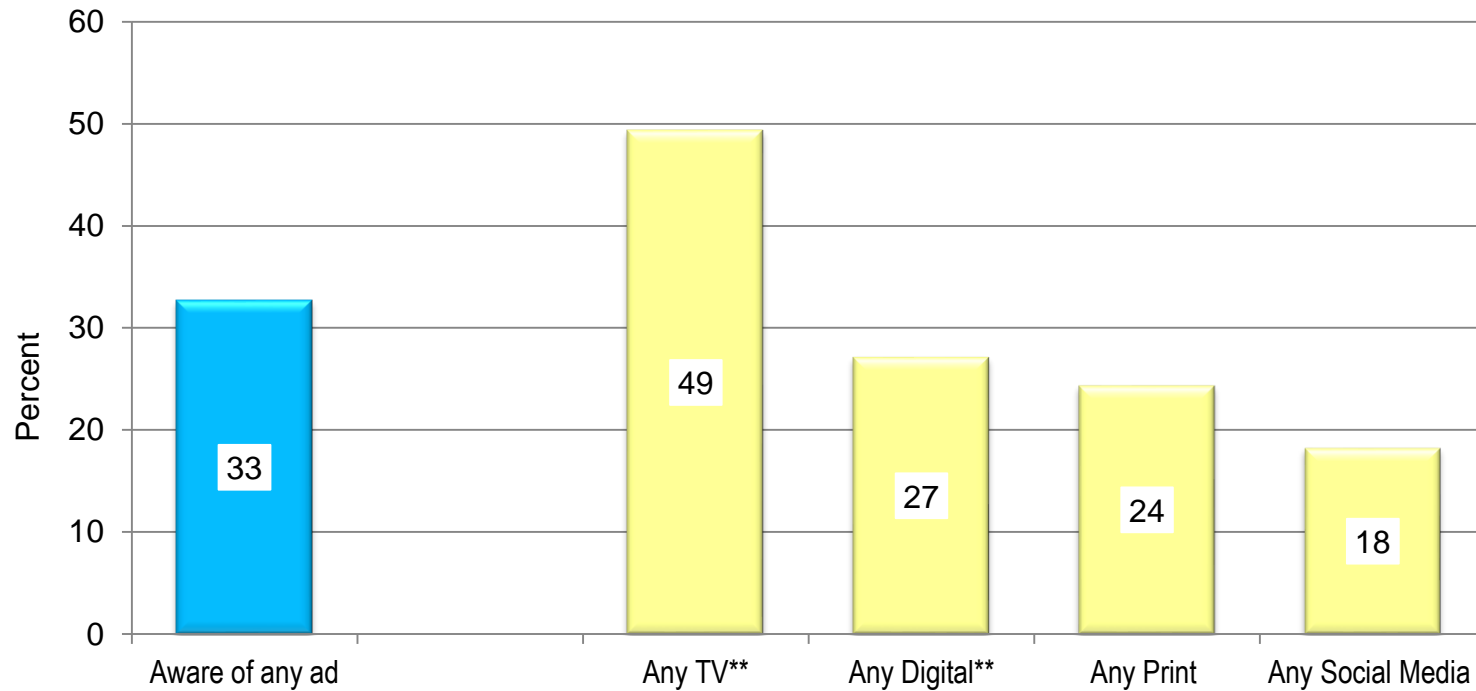
*Saw at least one ad

Awareness* by Market – by TV or Digital



*Saw at least one ad

Advertising Awareness* by Medium



*Saw at least one ad

** In markets seen

Print Creative

Print Compilation #1



Print Compilation #2

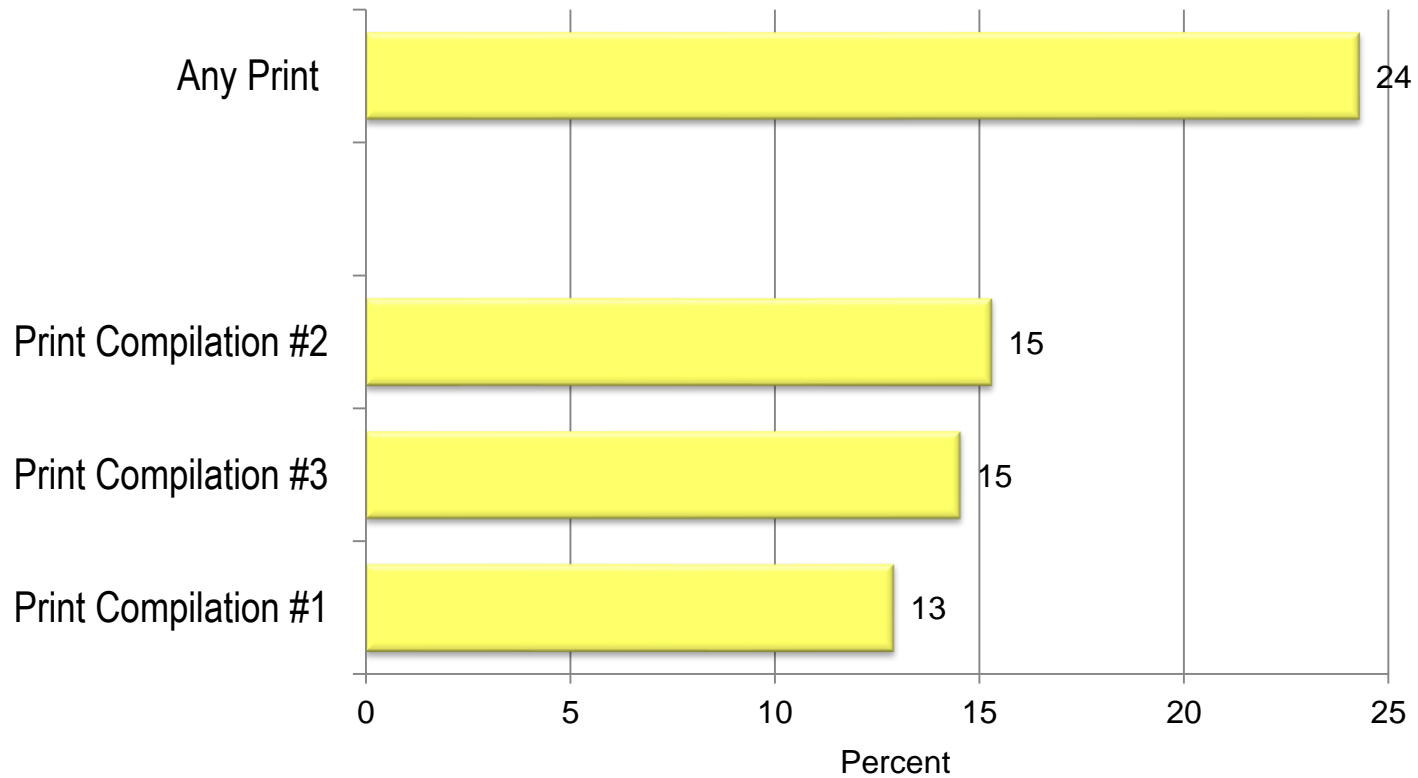


Print Compilation #3



Awareness of Individual Ads*

— Print




*Based on markets where shown

Social Media Creative

Beach Itinerary Compilation

Visit Mississippi Gulf Coast
Sponsored (demo)

Gulf-to-plate-to-belly. A trip to our Coast is a trip your tastebuds will thank you for.




SEAFOODIE ITINERARY

Seafood at its freshest!
Let us be your guide and take you through a seafood-studded adventure full of oysters, shrimp, and catches of the day. Discover your full Seafoodie Itinerary and plan your next trip now.

[Learn More](#)

Visit Mississippi Gulf Coast
Sponsored (demo)

Make our history part of yours. Step back in time for 3 days and explore our Coast!




HISTORY BUFF ITINERARY

History lives on here.
Here, you'll discover that our memory lane sure is crowded with historic gems. Travel up and down our 62 miles of coast to uncover our past. See the full itinerary and plan your next adventure.

[Learn More](#)

Visit Mississippi Gulf Coast
Sponsored (demo)

Pack your bags and your clubs for some all-year golfing at some all-time great courses.



PACKAGES START AT \$89 per person, per day.


MUST-DO ITINERARY

4 nights. 4 rounds.
Plan your epic golf getaway to the Mississippi Gulf Coast. There are world-class golf courses to play and 62 miles of coast full of casinos, dining, fishing, clubs, and craft beers! Yes, craft beers!

[Book Now](#)

Visit Mississippi Gulf Coast
Sponsored (demo)

When you're visiting the Coast, there are some things you just can't miss. Seriously.



MUST-DO ITINERARY


Choose your adventure.
Get the adrenaline going or just chill. Our Coast has plenty for you to explore. Epic adventures. Unbelievable meals. Hashtag-worthy views. Check out the full itinerary and get planning.

[Learn More](#)

Culture Itinerary Compilation

Visit Mississippi Gulf Coast
Sponsored (demo)

You can have priceless memories on the Gulf Coast – for a pretty great price.




High tides. Low price.
Great food. Adventurous activities. Charming accommodations. The Gulf Coast has tons to offer, and that includes some pretty great deals, too. See you soon.

[WWW.GULFCOAST.ORG](#)

Visit Mississippi Gulf Coast
Sponsored (demo)

Plan a trip to discover things you've heard about and things you never knew existed.




100 Amazing Memories
So much to do and see. The more you explore our Coast, the more you realize there's so much more to discover. Check out our 100 Things to Do on the Mississippi Gulf Coast Itinerary and get planning.

[Learn More](#)

Visit Mississippi Gulf Coast
Sponsored (demo)

Adventures by land, water, and plate. Make the most of your weekend on the Gulf.



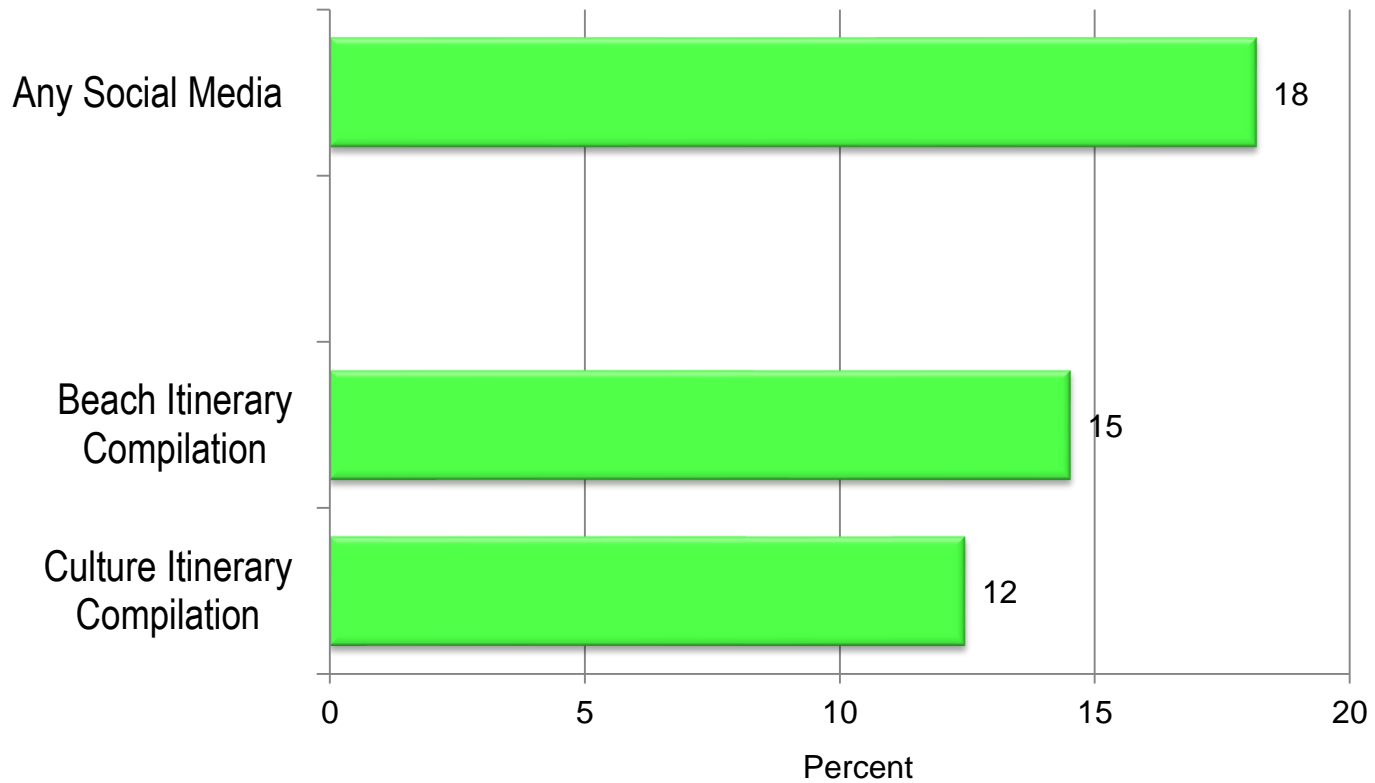
WEEKEND IT UP ITINERARY

Weekend better!
We got plans for your weekend – swim, dance, shop, discover, and eat. We have a big supply of great memories and amazing adventures with our Weekend It Up Itinerary. Plan your next trip and live it up.

[Learn More](#)

Awareness of Individual Ads*

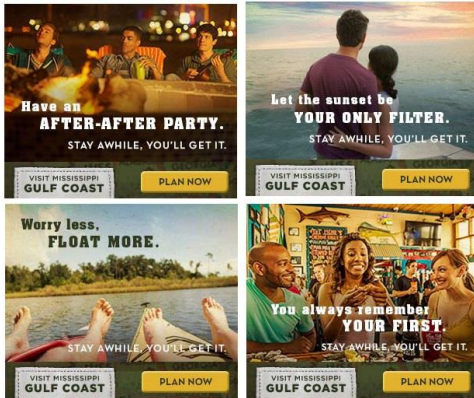
— Social Media



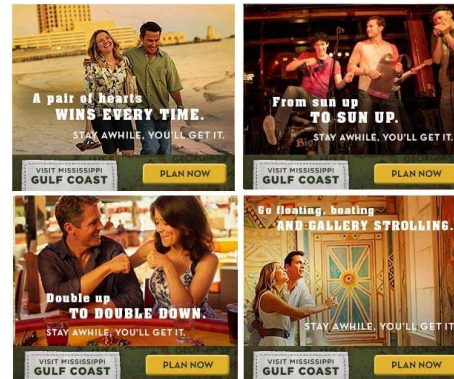
*Based on markets where shown

Digital Creative

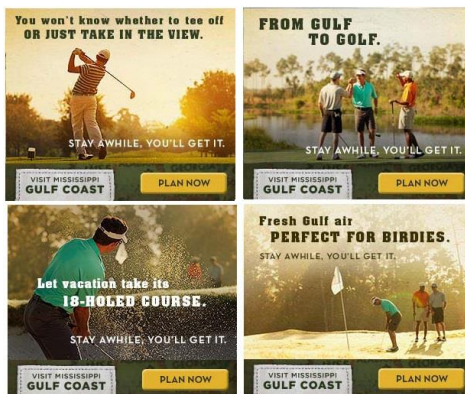
Beach Compilation



Culture Compilation



Golf Compilation

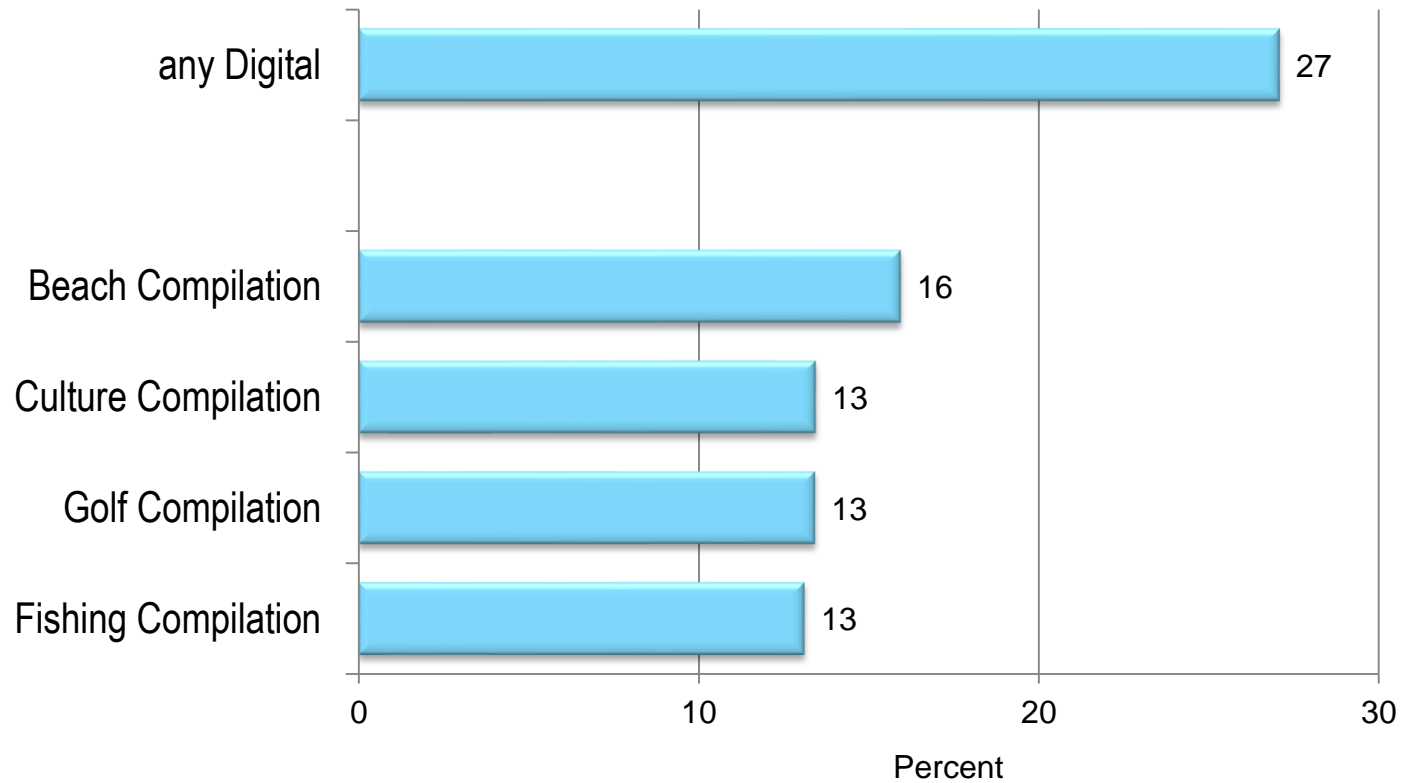


Fishing Compilation



Awareness of Individual Ads*

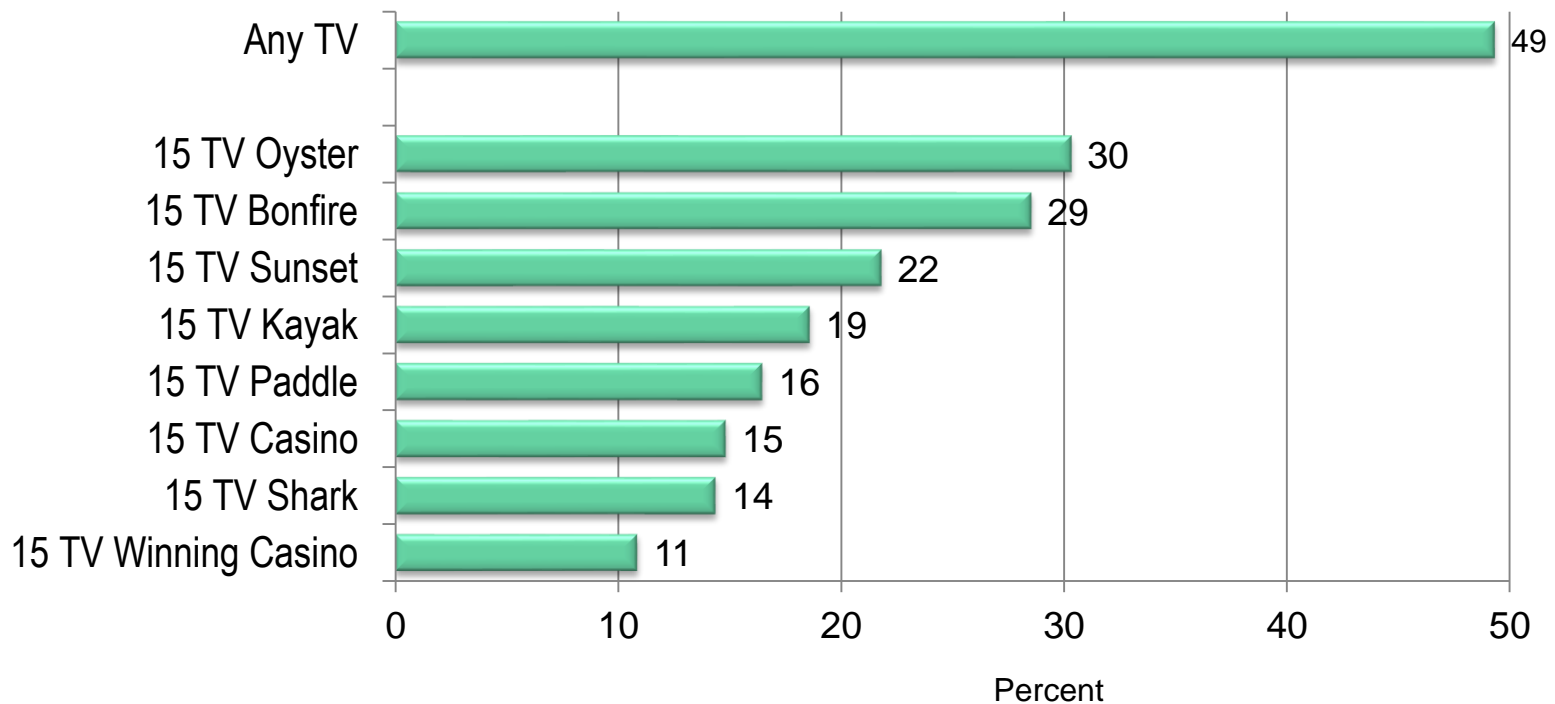
— Digital



*Based on markets where shown

Awareness of Individual Ads*

— TV



*Based on markets where shown



Advertising Impact on Short-of-Sales Measures

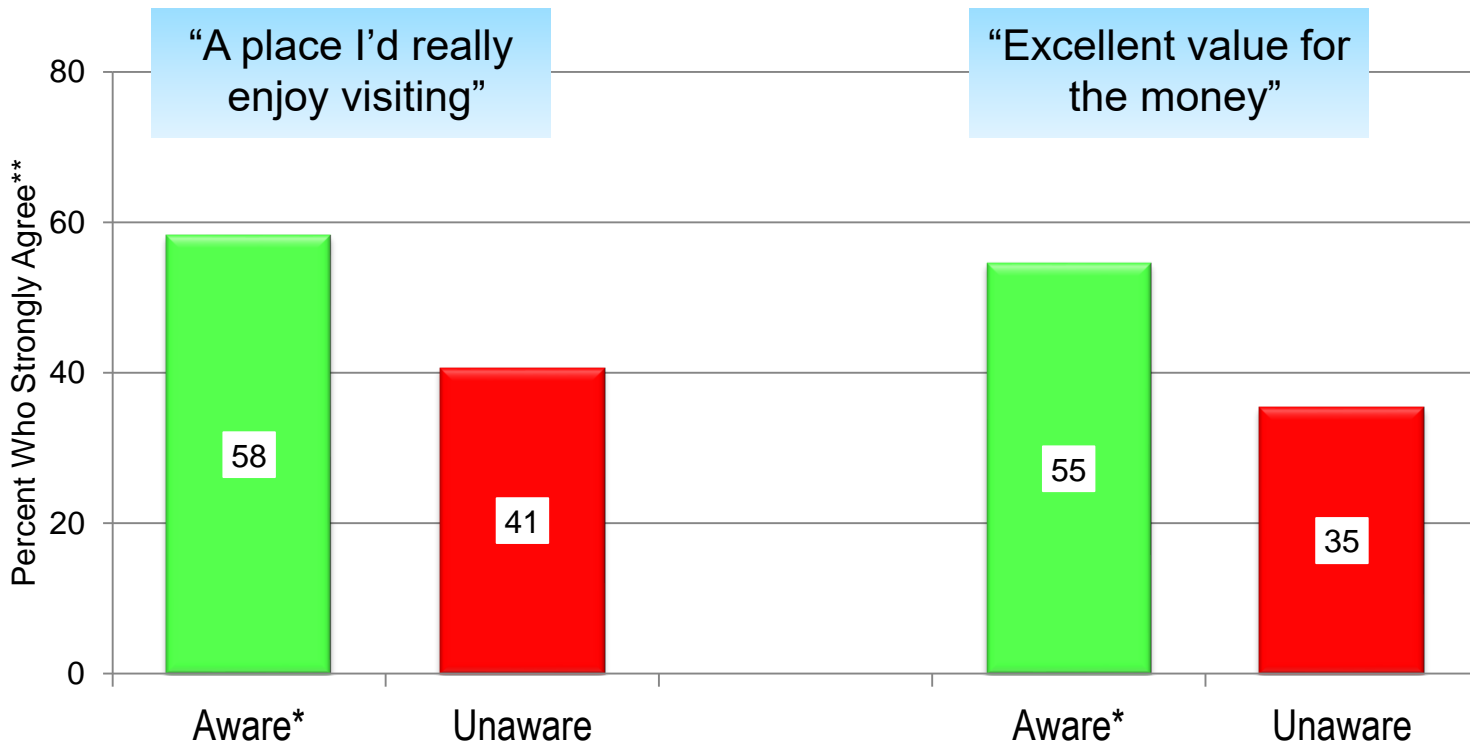
Advertising Impacts

- The campaign had a positive impact on travelers' perceptions of Visit Mississippi Gulf Coast:
 - ✓ People exposed to the campaign gave Visit Mississippi Gulf Coast substantially higher rating scores than those unfamiliar with the campaign for the general overall statement "Visit Mississippi Gulf Coast is a place I would really enjoy visiting" and the notion that a vacation in Visit Mississippi Gulf Coast provides "excellent value for the money."
 - ✓ For the more detailed attributes, we find that the campaign did a very good job of improving people's perceptions of Visit Mississippi Gulf Coast for every image dimension evaluated.

Advertising Impacts

- The advertising had greatest impact on perceptions related to:
 - Climate especially, a good contrast of seasons.
 - Entertainment, such as shopping, theater/arts, events such as festivals, etc.
 - Having warm, friendly people
 - Having great spectator sports venues and being good for golfers
 - Unique, especially a unique vacation experience, beautiful scenery.
- In addition to changing perceptions of Visit Mississippi Gulf Coast, the advertising created greater interest in traveling to the Mississippi Gulf Coast in the next 12 months. Those aware of the advertising are 2 ½ times more likely to visit.

Advertising Impact on Visit Mississippi Gulf Coast's Overall Image



*Saw at least one ad.

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

Advertising Impact on Visit Mississippi Gulf Coast's Image

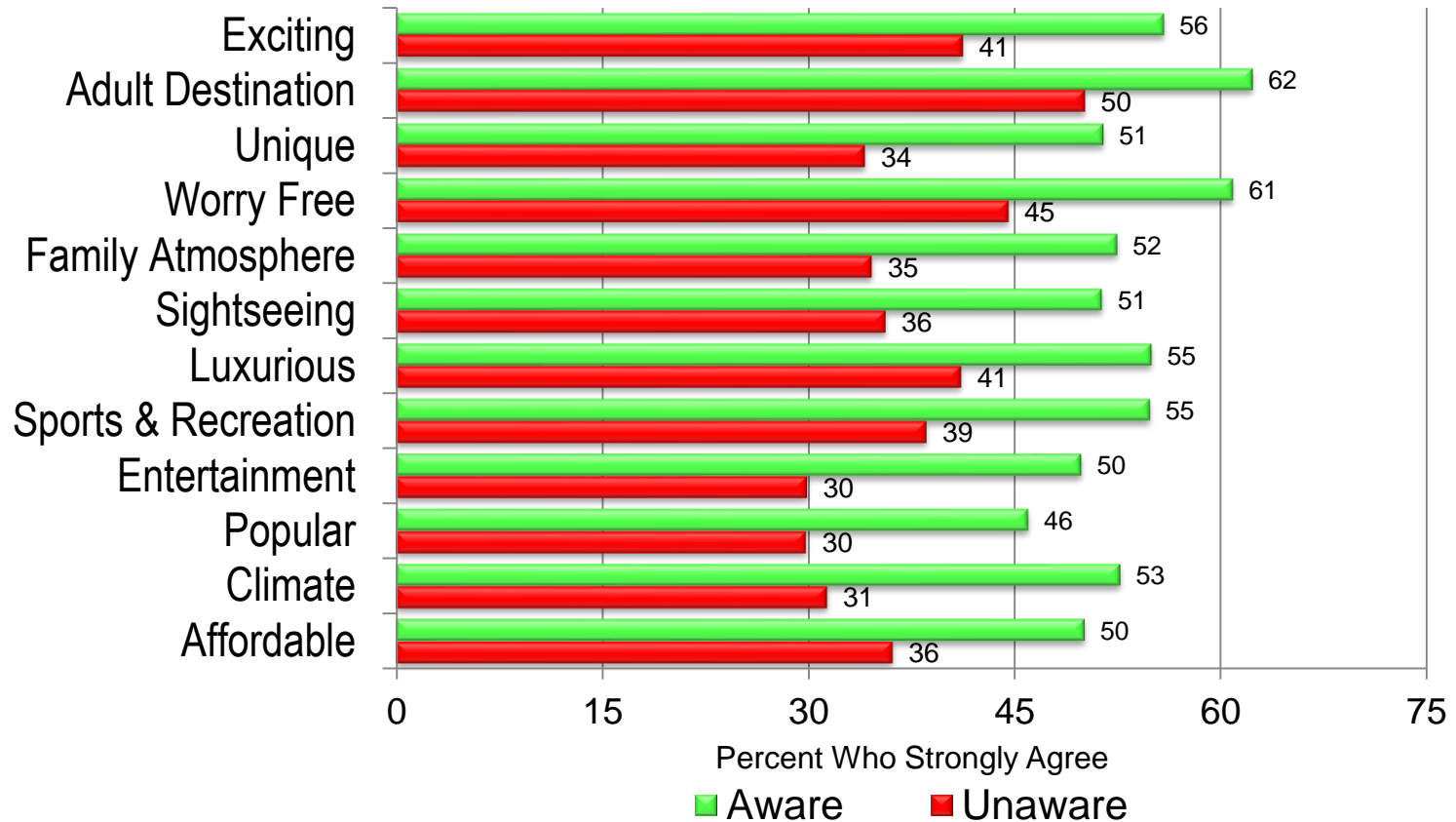
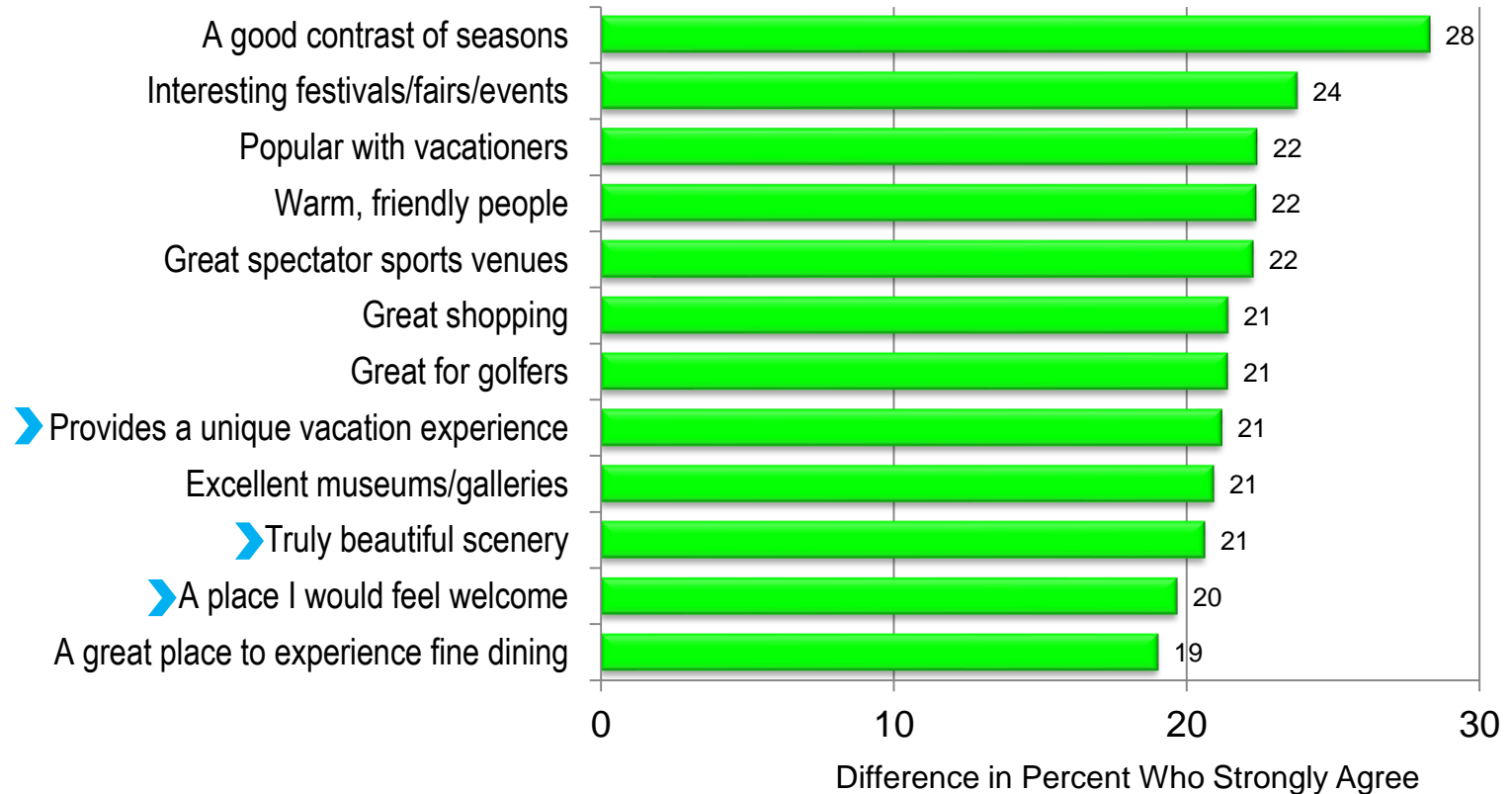
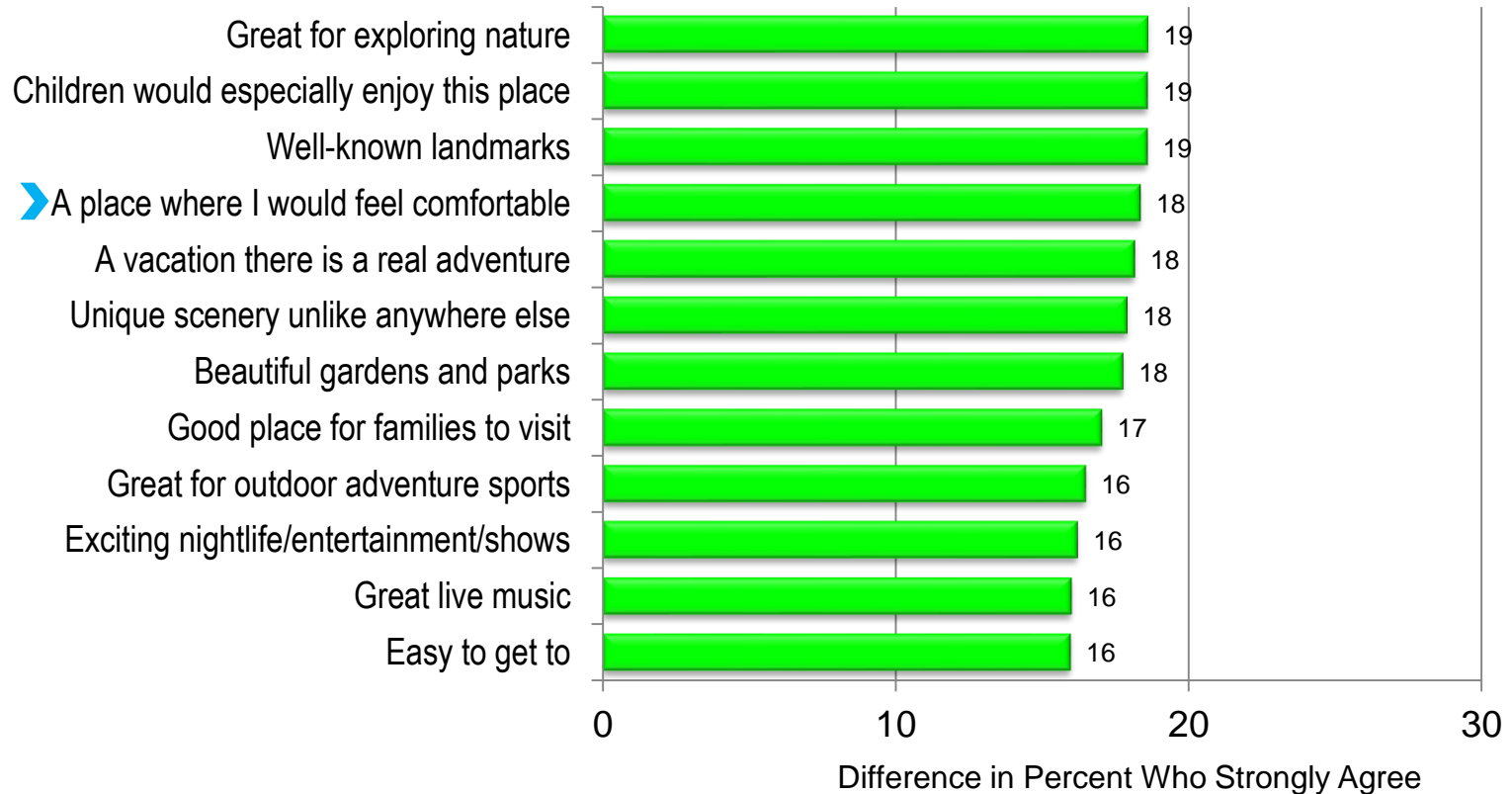


Image Attributes Most Impacted by Advertising



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Image Attributes Most Impacted by Advertising (Cont'd)



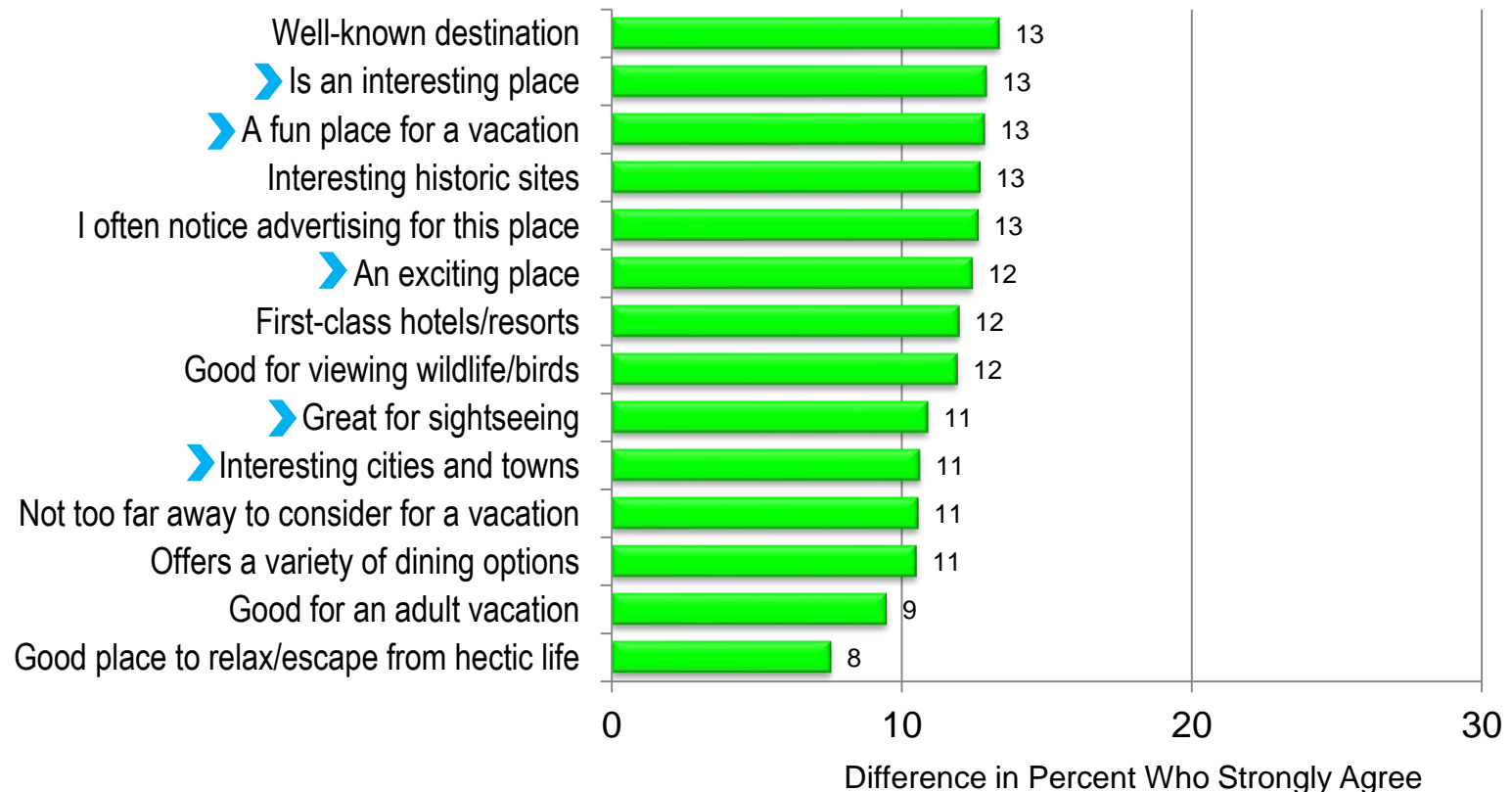
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Image Attributes Most Impacted by Advertising (Cont'd)



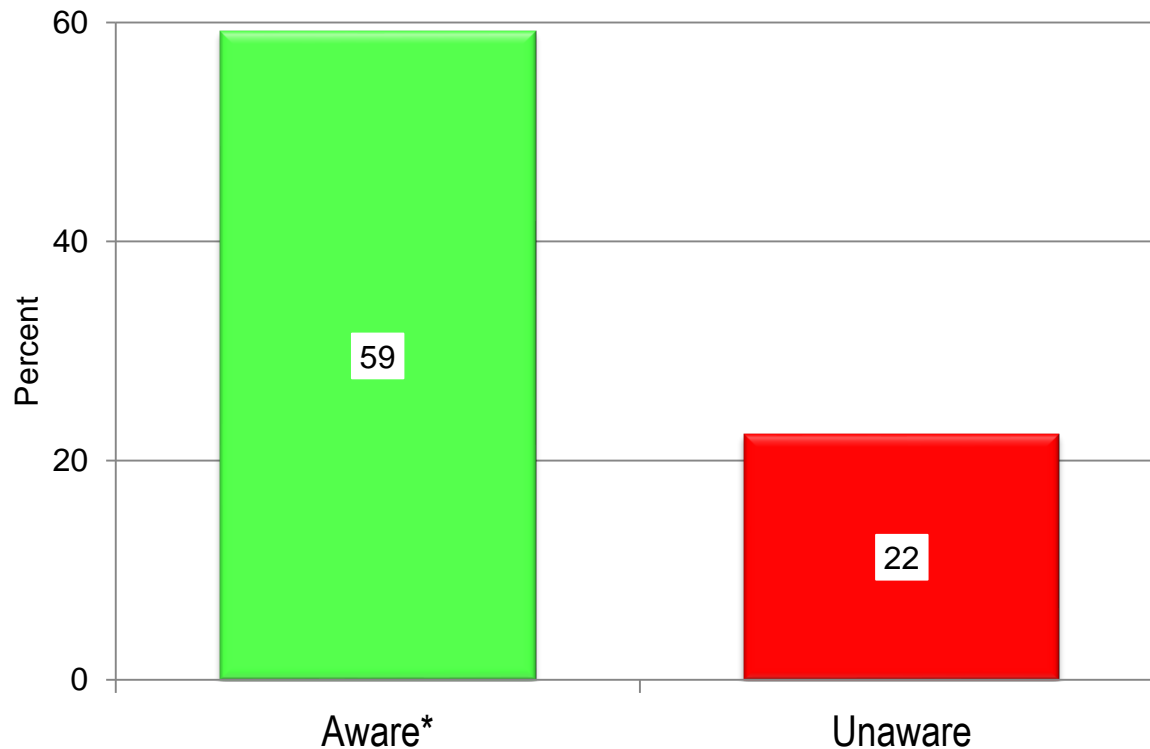
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Image Attributes Most Impacted by Advertising (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Impact of Advertising on Intent to Visit Mississippi Gulf Coast in the Next 12 Months



*Saw at least one ad.



Main Findings: Visit Mississippi Gulf Coast's Overall Position in the Target Market



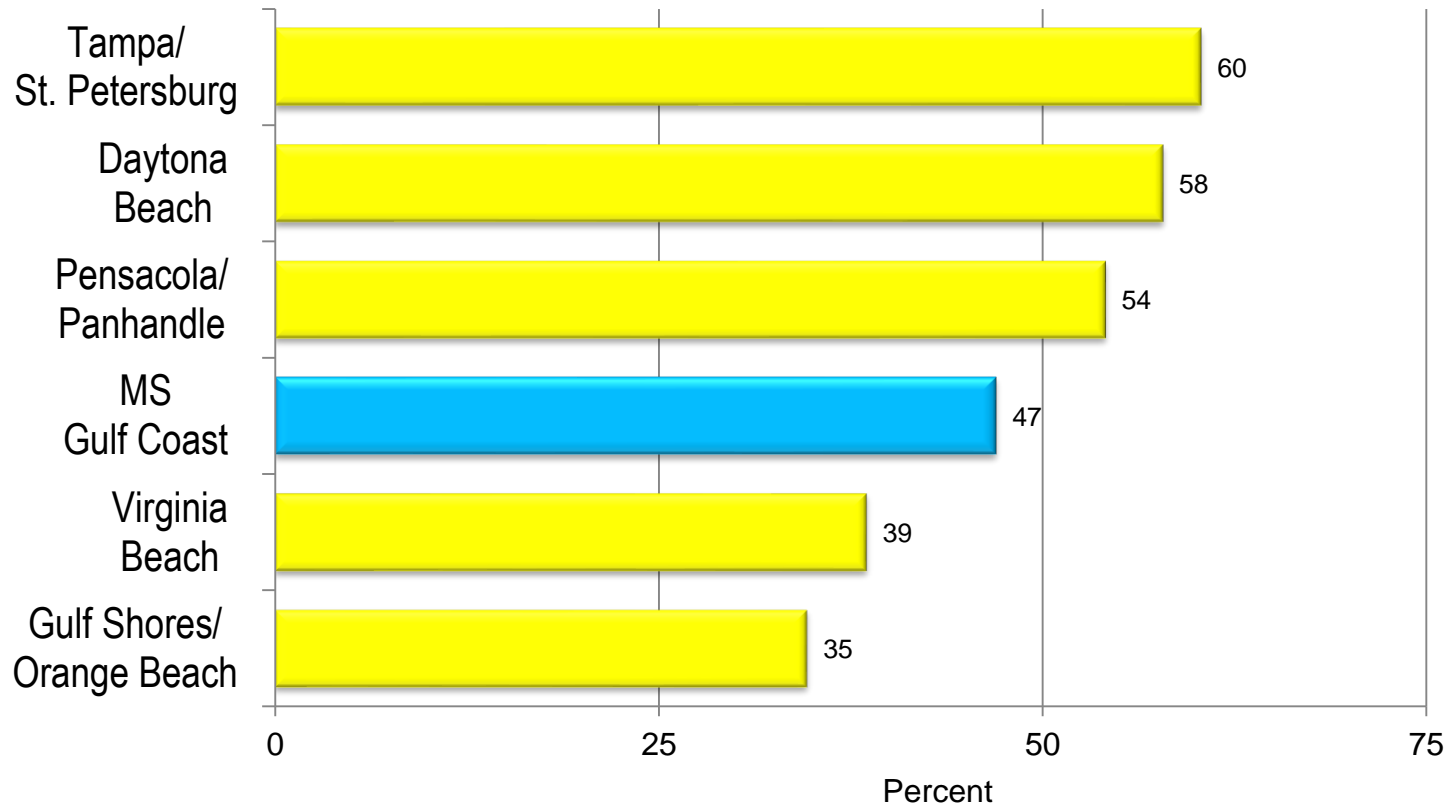
Longwoods
INTERNATIONAL

Destination
Visitation
& Interest

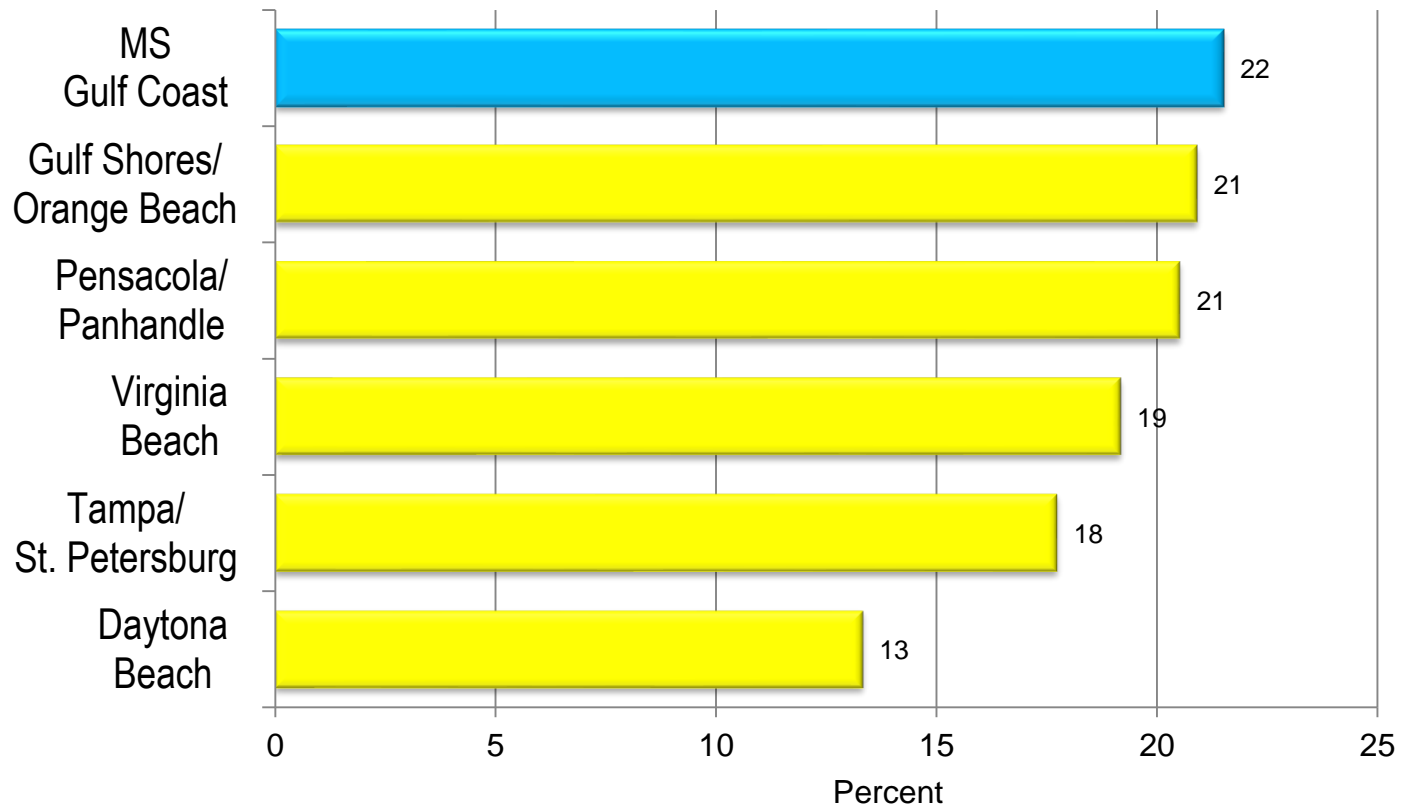
The Competitive Set

- Mississippi Gulf Coast is slightly above the other studied destination as a place they visited in the past two years. About one-third of the travelers plan to visit the Mississippi Gulf Coast in the next year.
- Slightly less than half (47%) of the travelers have ever visited the Mississippi Gulf Coast. This level is only exceeded by Tampa/St. Petersburg, Daytona Beach, and Pensacola/Panhandle.
- Although the past two year visitation is similar for old and new advertised markets, the likelihood of future visitation is much greater among the new markets.

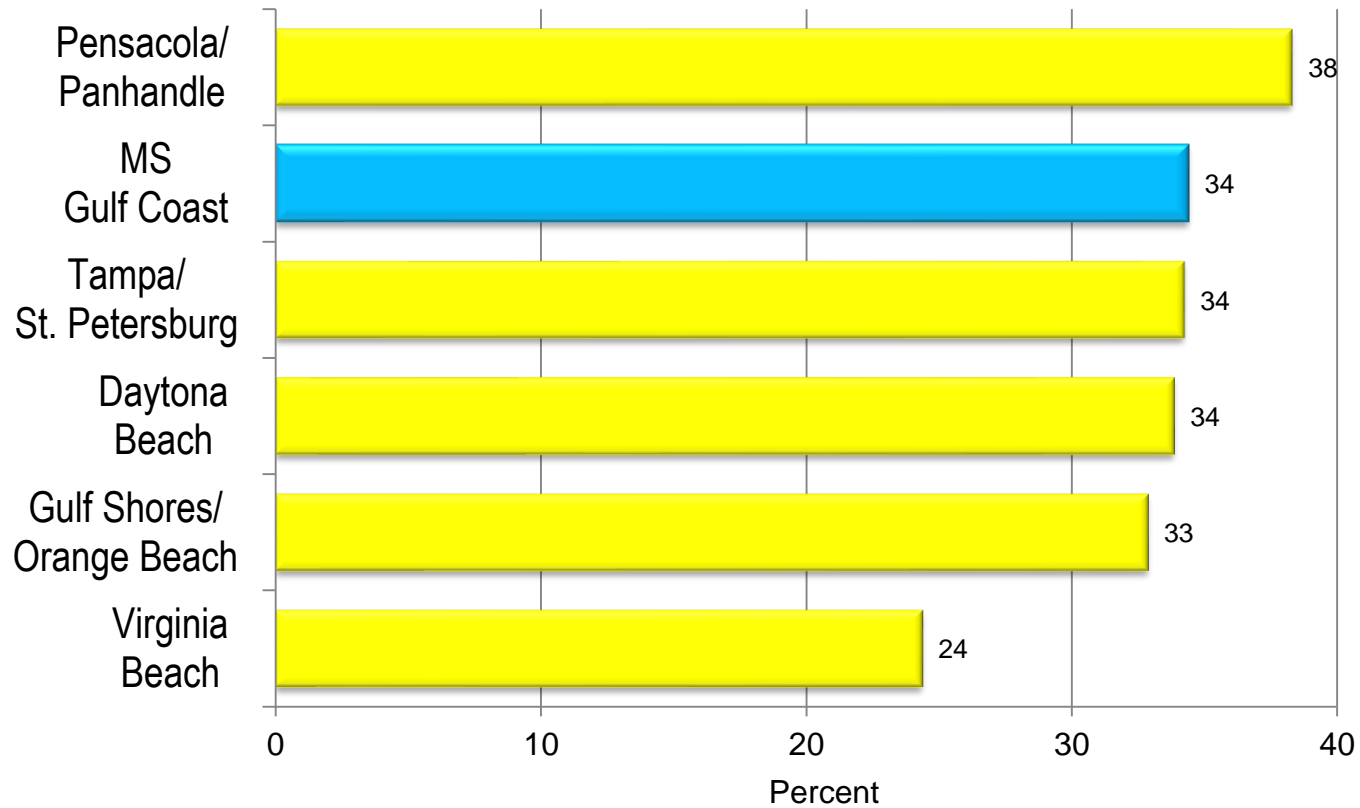
Destinations Ever Visited



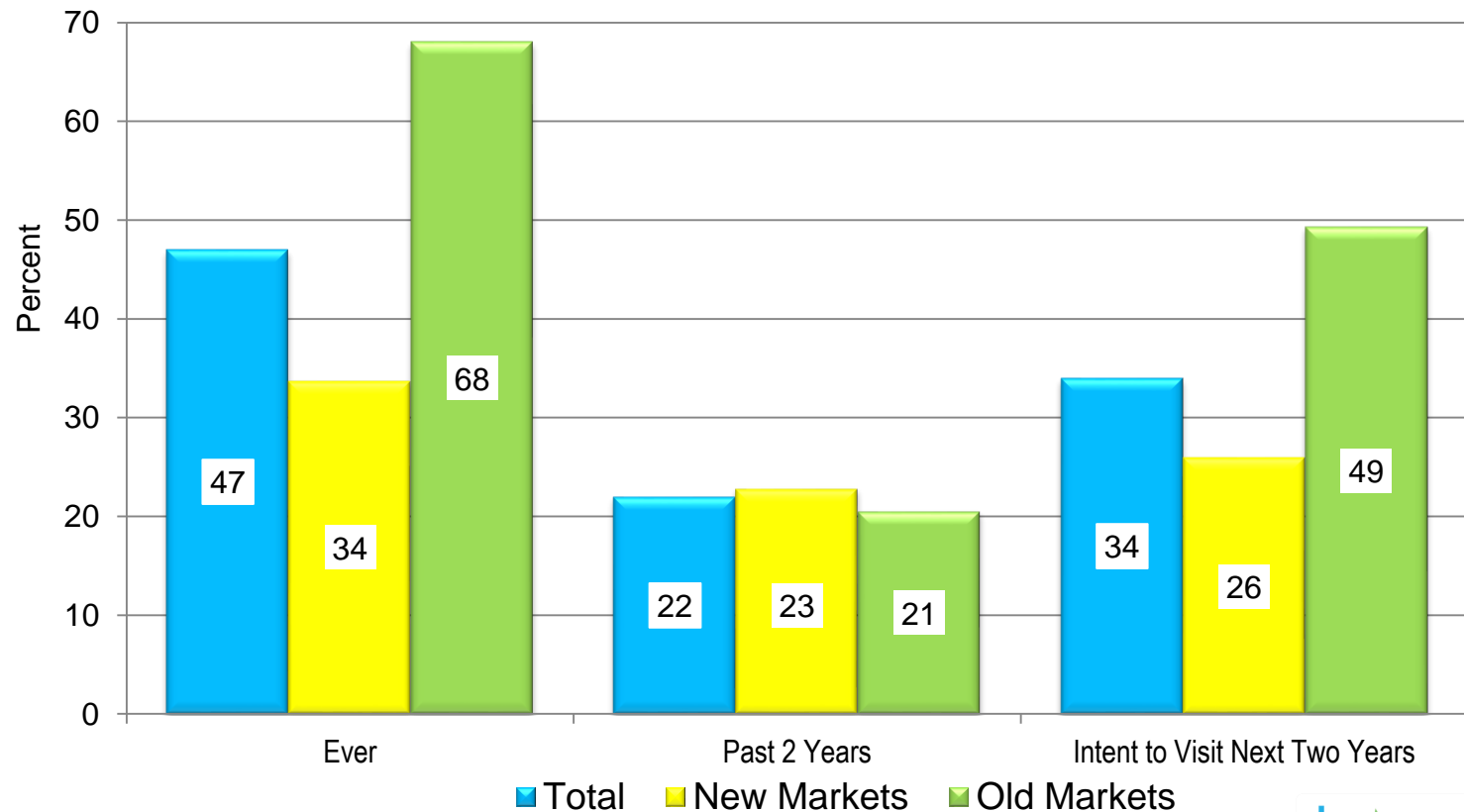
Destinations Visited in Past 2 Years



Destinations Intend to Visit in Next Two Years



Mississippi Gulf Coast Visitation by Market – by Age of Advertising





Longwoods
INTERNATIONAL

Destination Hot Buttons

Travel Motivators

- Respondents evaluated the image of Visit Mississippi Gulf Coast and five other destinations on an overall basis and on a series of 52 additional detailed image attributes.
- To determine hot buttons for getting on the “wish list”, we measured the degree of association between the destinations’ overall image and their ratings on individual attributes:
 - ✓ For this purpose, we used the main overall measure included in the image battery – “A place I would really enjoy visiting” – as the predictor variable.
- Then, in order to better communicate the results, the data were grouped into broader categories or factors.
- For a destination in this competitive set to get on travelers’ consideration list, it must, first and foremost, be perceived to:
 - ✓ Be **exciting** – being seen as exciting means being a must-see place to visit, offering many once-in-a-lifetime experiences and a real sense of fun and adventure.
 - ✓ Be suitable for **adults** and couples – which is logical, since they are paying for the vacation.
 - ✓ **Uniqueness**, including the scenery, local food, people and culture.

Travel Motivators

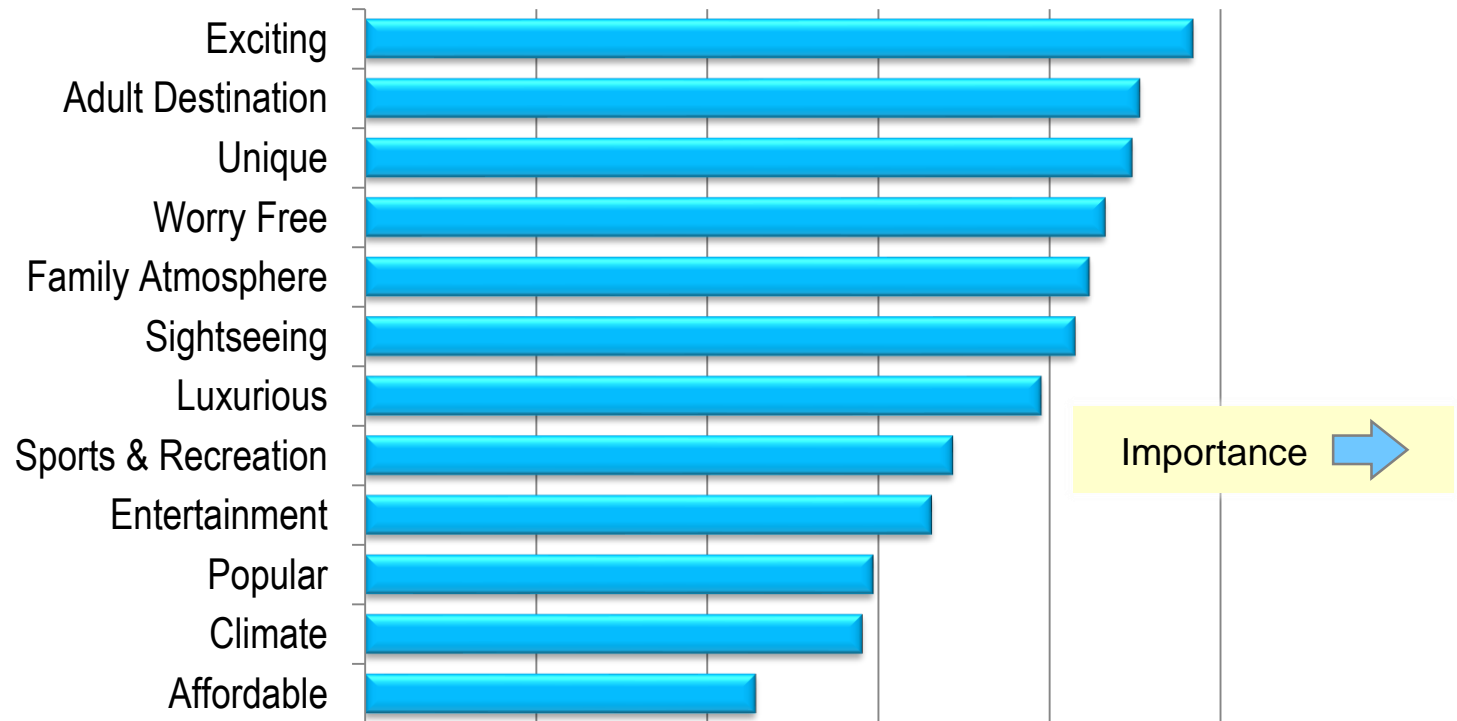
- There are several factors that individually are of moderate importance, but that in combination define the excitement and suitability for adults that attracts vacationers to a destination:
 - ✓ A great **family atmosphere** – with things to see and do that kids would especially enjoy.
 - ✓ Great **sightseeing**, including lots to see and do, beautiful scenery, landmarks, walkability, parks, museums, etc.
 - ✓ The availability of **luxurious** accommodations and dining.
 - ✓ A safe, welcoming and **worry-free** environment

Travel Motivators

- Lower priorities are:
 - ✓ **Sports and recreation**, including organized activities (e.g., golf, fishing), great spectator venues, motorcycle touring, and other outdoor recreation.
 - ✓ The opportunities for **entertainment**, e.g., shopping, theater, nightclubs, live music, professional sports events.
 - ✓ **Popularity**, i.e., is the place popular among vacationers? Is it well-known? Do you often see advertising or favorable reviews?
 - ✓ **Climate.**

- **Affordability** is also relatively unimportant at the wish list stage:
 - ✓ But it tends to rise to the top of the list the closer one gets to closing the sale, as travel distance and pocketbook issues come into play.
 - ✓ Affordability includes both the cost of getting there/distance to market and costs once you have arrived, such as food and lodging.

Travel Motivators



*A measure of the degree of association between each factor and whether destination is a place “I would really enjoy visiting.”

Top 10 Hot Buttons

Hot Buttons
A place where I would feel comfortable
A fun place for a vacation
An exciting place
Provides a unique vacation experience
Truly beautiful scenery
A place everyone should visit at least once
Is an interesting place
A place I would feel welcome
Great for sightseeing
Interesting cities and towns



Mississippi Gulf Coast's Image vs. Competition

Mississippi Gulf Coast's Image

- Mississippi Gulf Coast has a positive overall image among travelers:
 - ✓ Across the markets survey, almost half (47%) rated Mississippi Gulf Coast very favorably as a destination they “would really enjoy visiting.”
 - ✓ virtually the same as indicated for the other destinations studied.
- On the other overall image measure, perceptions for “value for money”, the rank ordering is quite different:
 - ✓ Mississippi Gulf Coast, Pensacola/Florida Panhandle and Gulf Shores/Orange Beach are tied at the top of the list and are thought to offer somewhat more value than Daytona Beach, Tampa/St. Petersburg, and Virginia Beach.

Mississippi Gulf Coast's Image – Cont'd

- When comparing Mississippi Gulf Coast's image versus the image of the combined competition, Mississippi Gulf Coast's top image strengths are related to:
 - ✓ Excellent fishing.
 - ✓ Just the right distance for a weekend getaway.
 - ✓ Affordable to eat there.
 - ✓ An exciting place.
 - ✓ Great for exploring nature.
- Among travelers, only being “an exciting place” is a top predictor of destination interest.

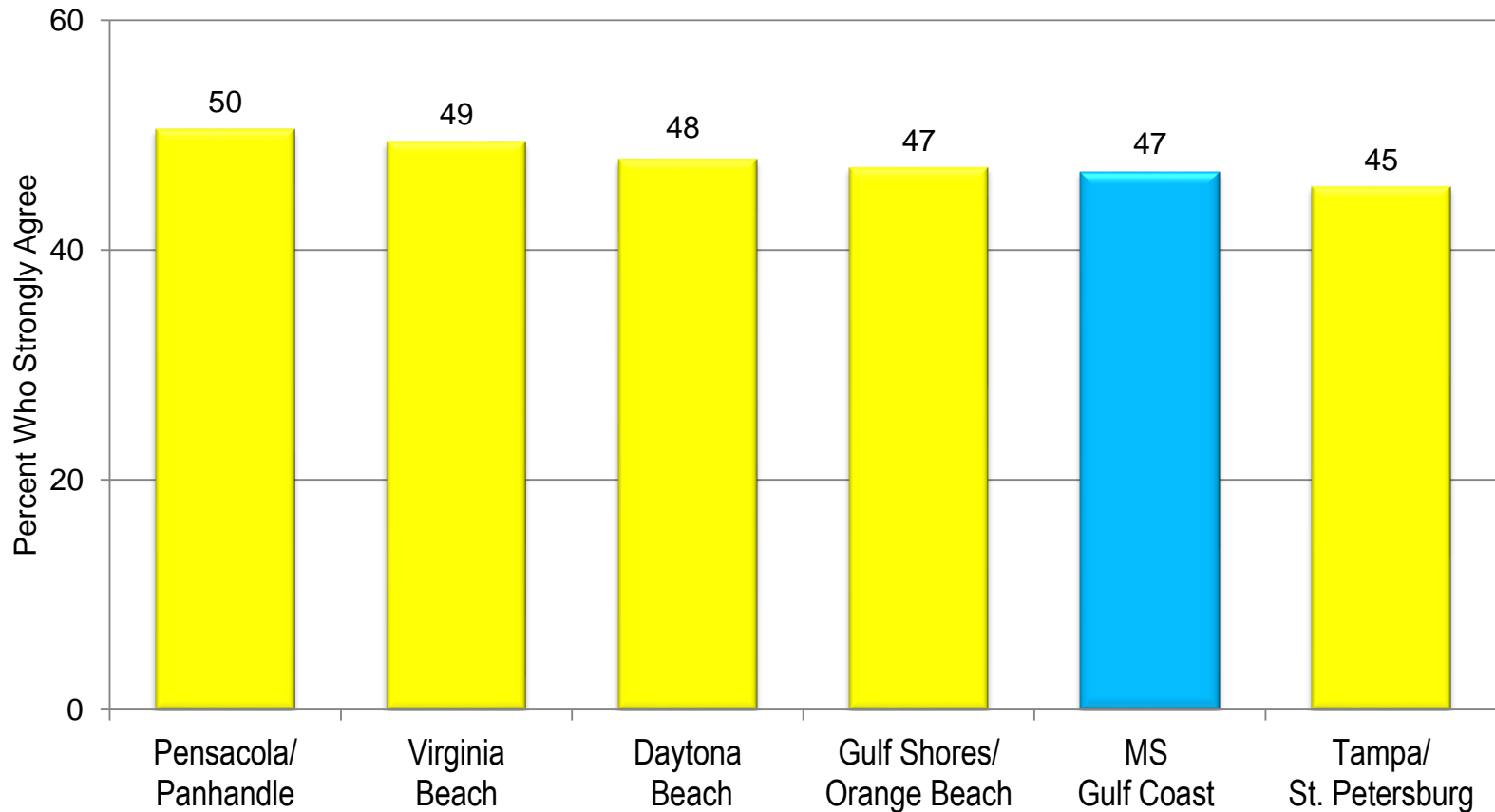
Mississippi Gulf Coast's Image – Cont'd

- Mississippi Gulf Coast's main perceived weaknesses relate to:
 - ✓ Good for families.
 - ✓ Being well known.
 - ✓ Great shopping.
 - ✓ Being a real adventure.
 - ✓ Lots of things to see and do.
- None of these weaknesses are one of the most important drivers of destination choice.

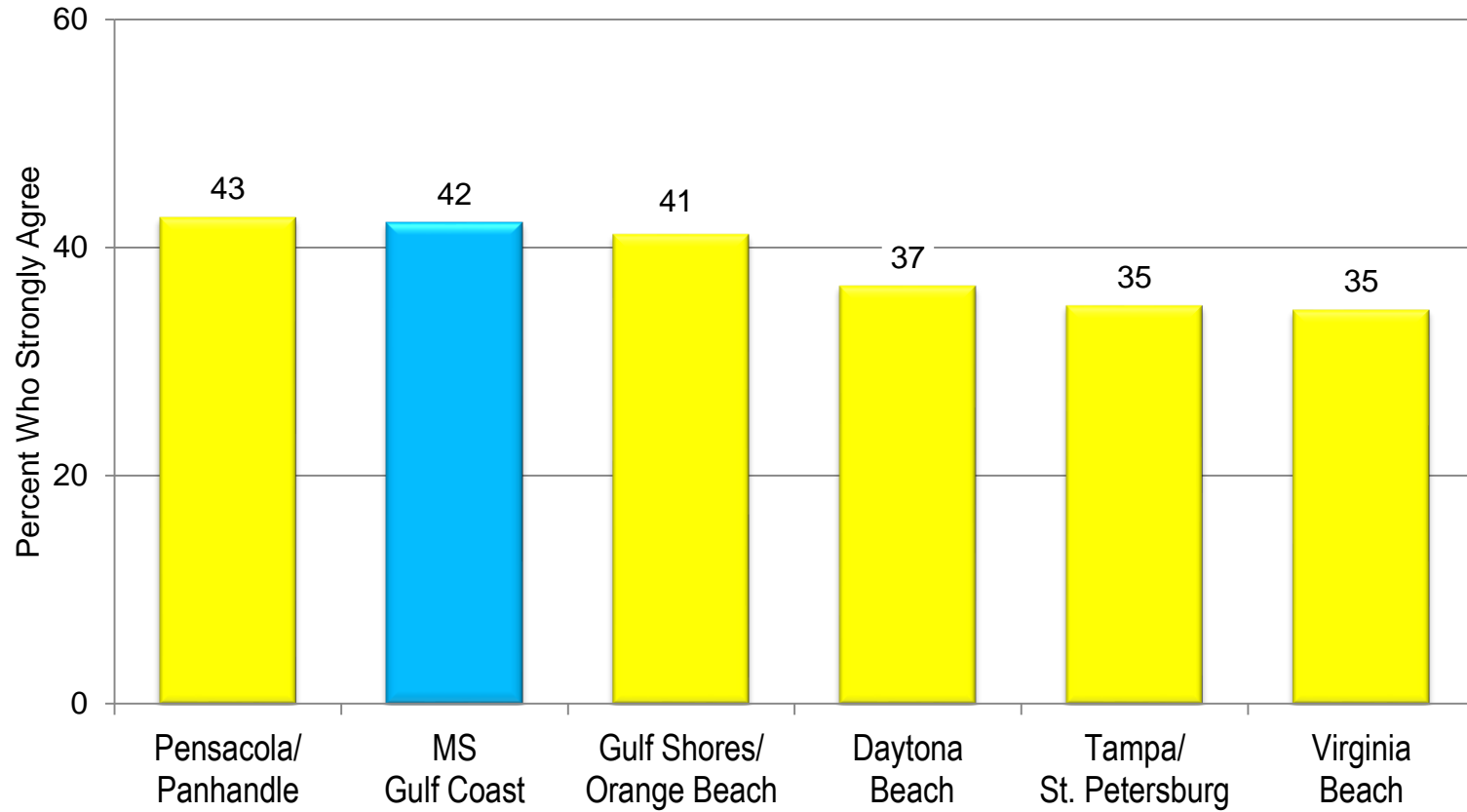
Mississippi Gulf Coast's Image – Cont'd

- When we compare ratings of Mississippi Gulf Coast versus the individual competitors, there are several dimensions on which Mississippi Gulf Coast appears to have a unique advantage over most of the competitors evaluated:
 - ✓ Excellent fishing (except Gulf Shores/Orange Beach).
 - ✓ Being exciting place (except for Gulf Shores and Pensacola/Florida Panhandle).
 - ✓ Being affordable (except for Gulf Shores and Pensacola/Florida Panhandle).
- The Mississippi Gulf Coast is thought to be lower than all the competitors for:
 - ✓ Suitability for children.
 - ✓ Great for golfers.
 - ✓ Being a well-known destination.

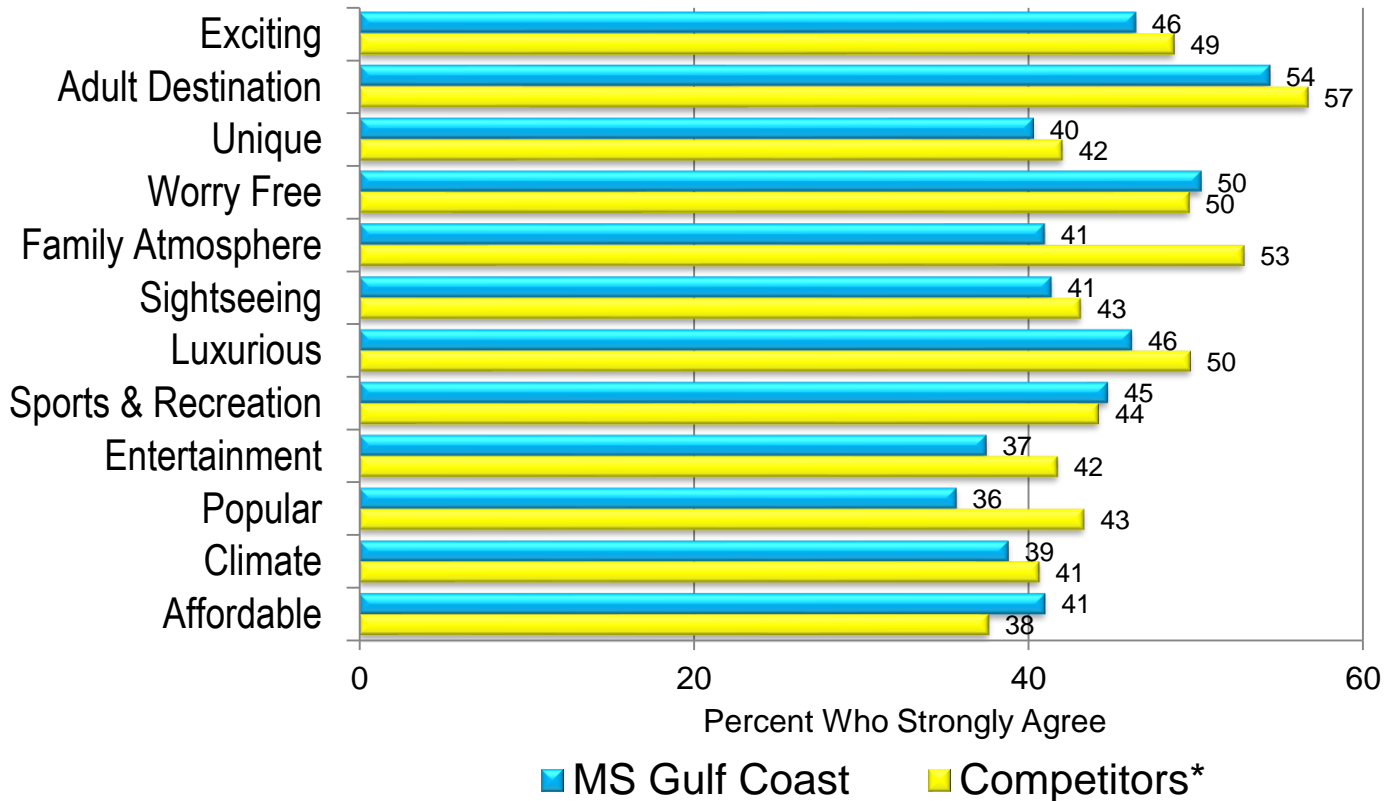
Mississippi Gulf Coast's Overall Image vs. Competition — “A Place I Would Really Enjoy Visiting”



“Excellent Value For the Money”

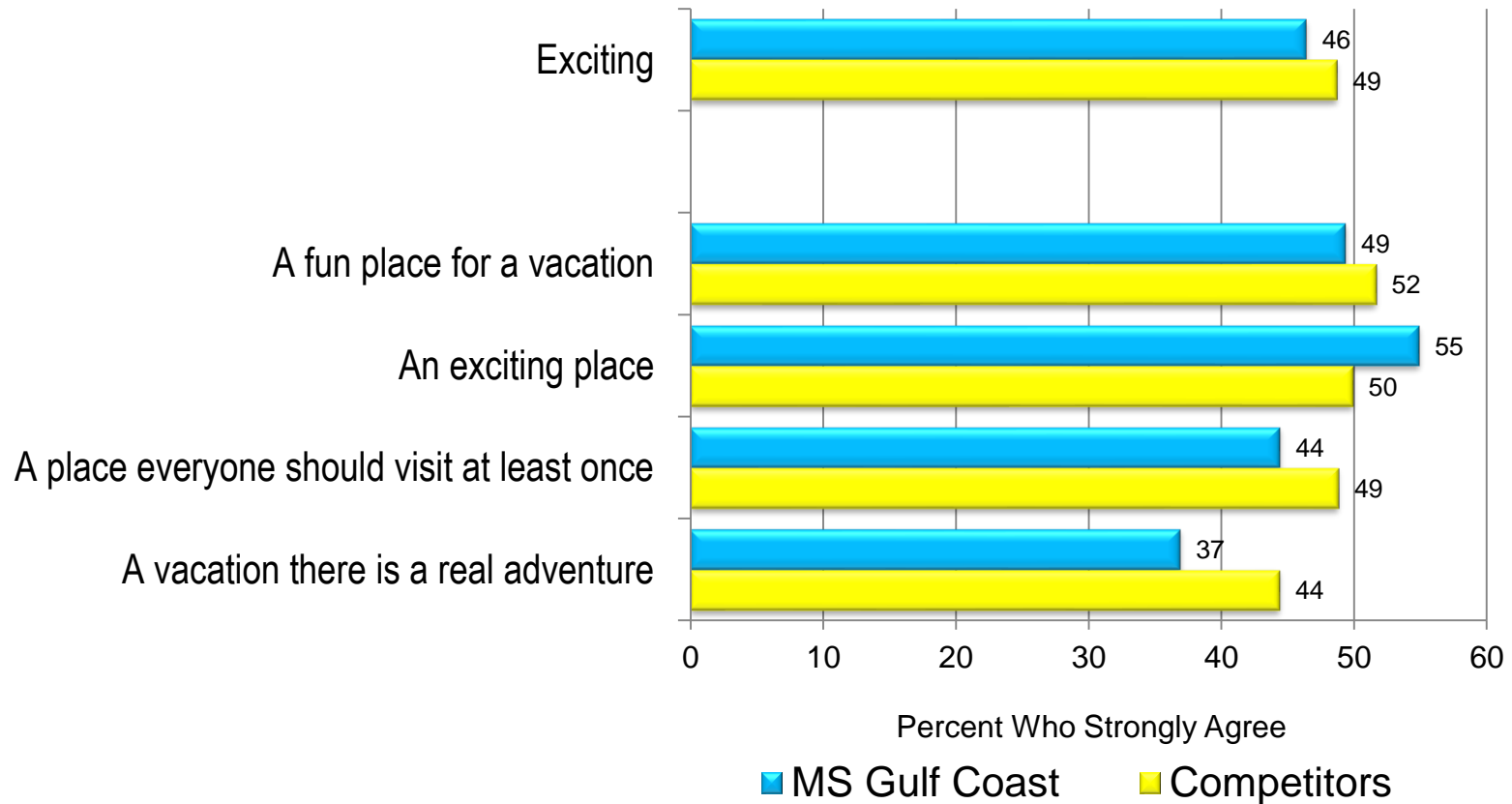


Mississippi Gulf Coast's Overall Image vs. Competition

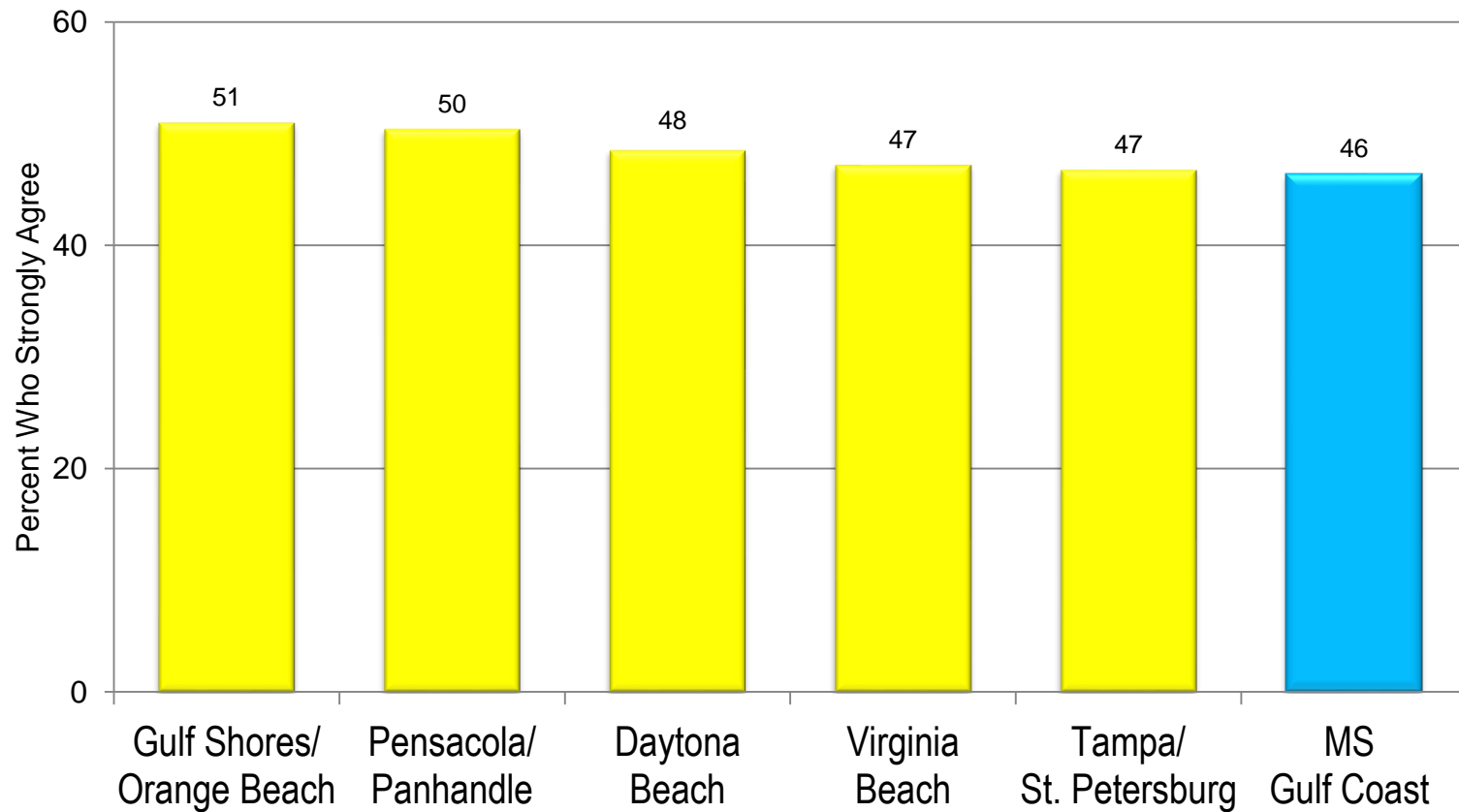


* Includes Gulf Shores/Orange Beach, Pensacola/Panhandle, Daytona Beach, Tampa/St. Petersburg, and Virginia Beach

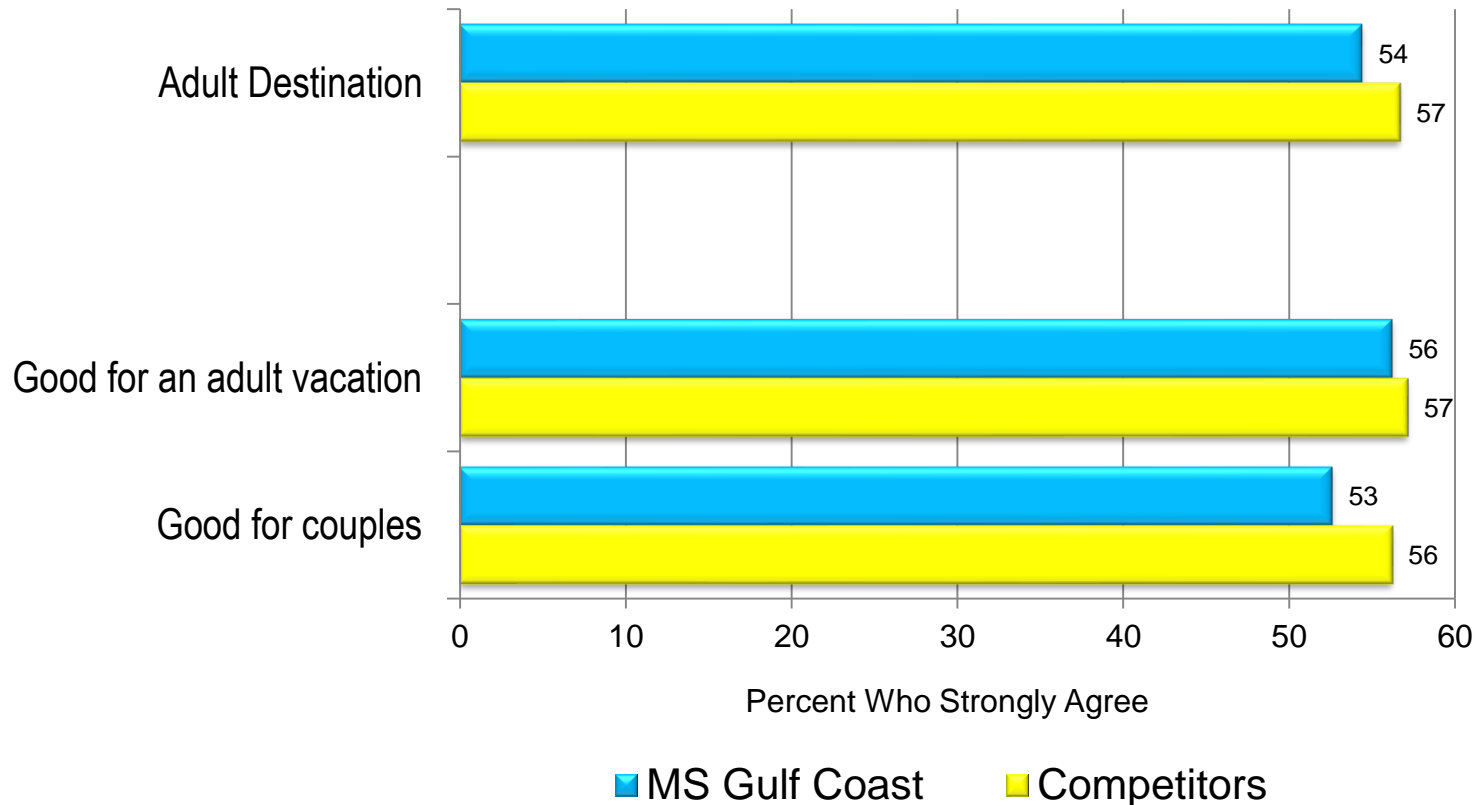
Mississippi Gulf Coast's Image vs. Competition — Exciting



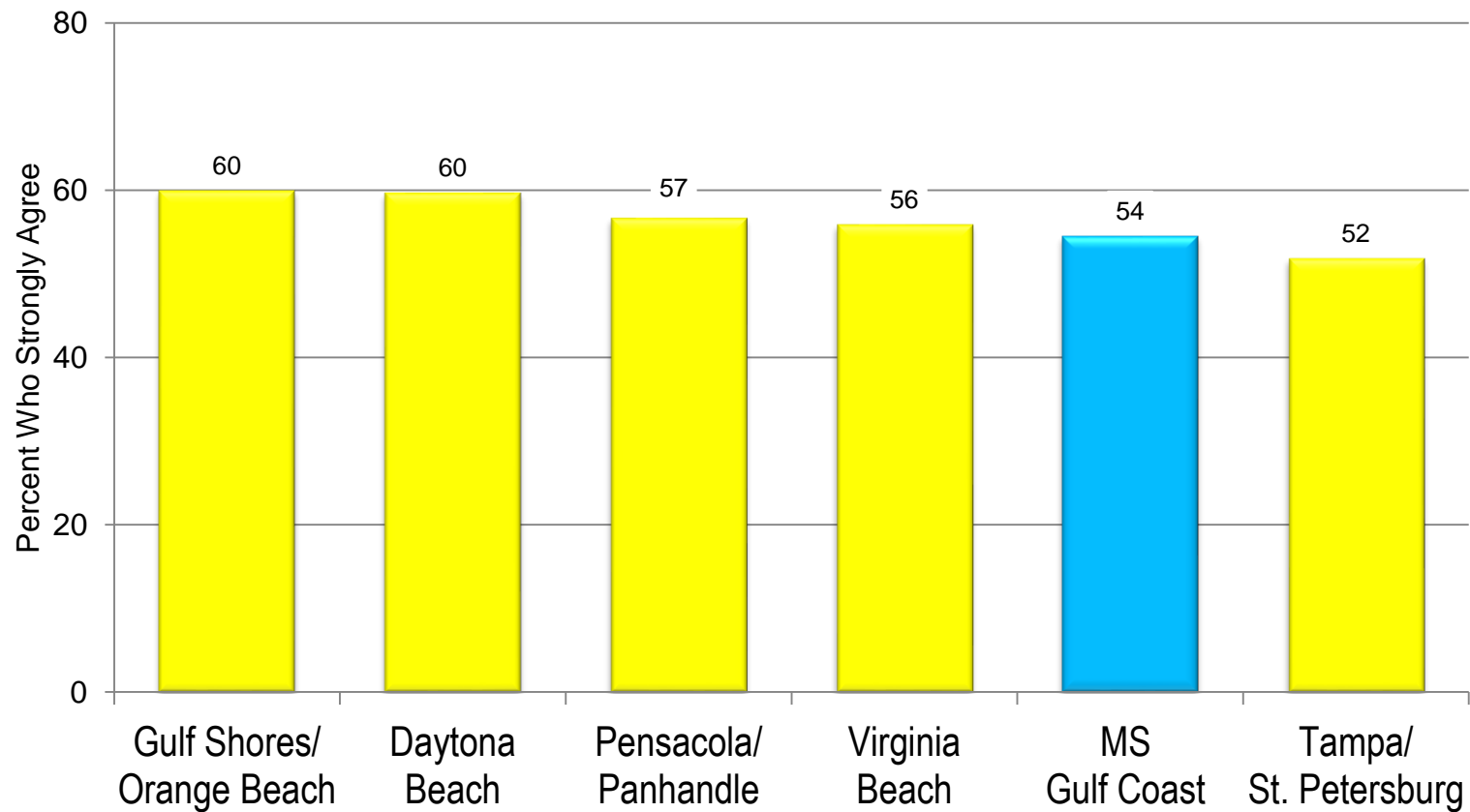
Mississippi Gulf Coast's Image vs. Competition — Exciting



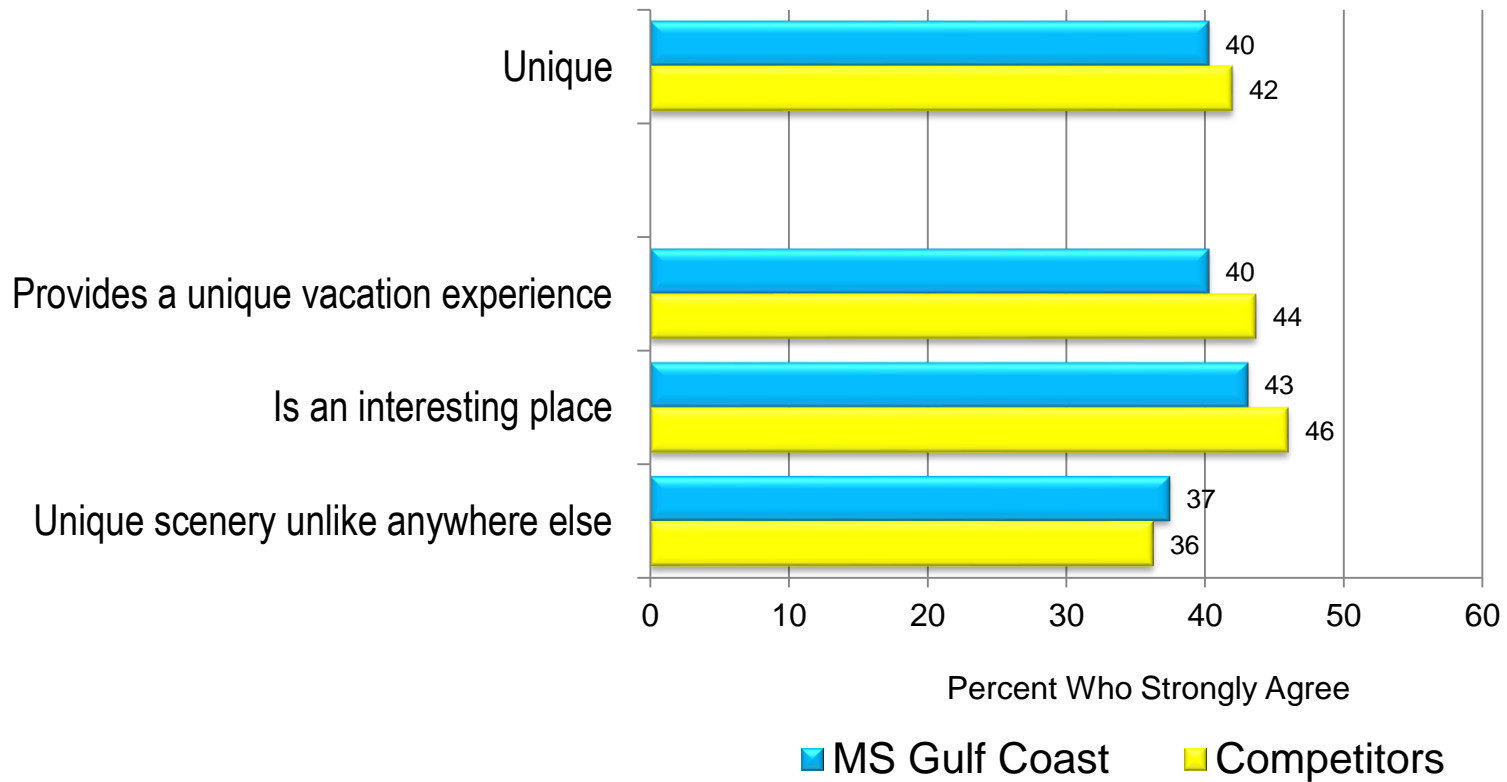
Mississippi Gulf Coast's Image vs. Competition — Adult Destination



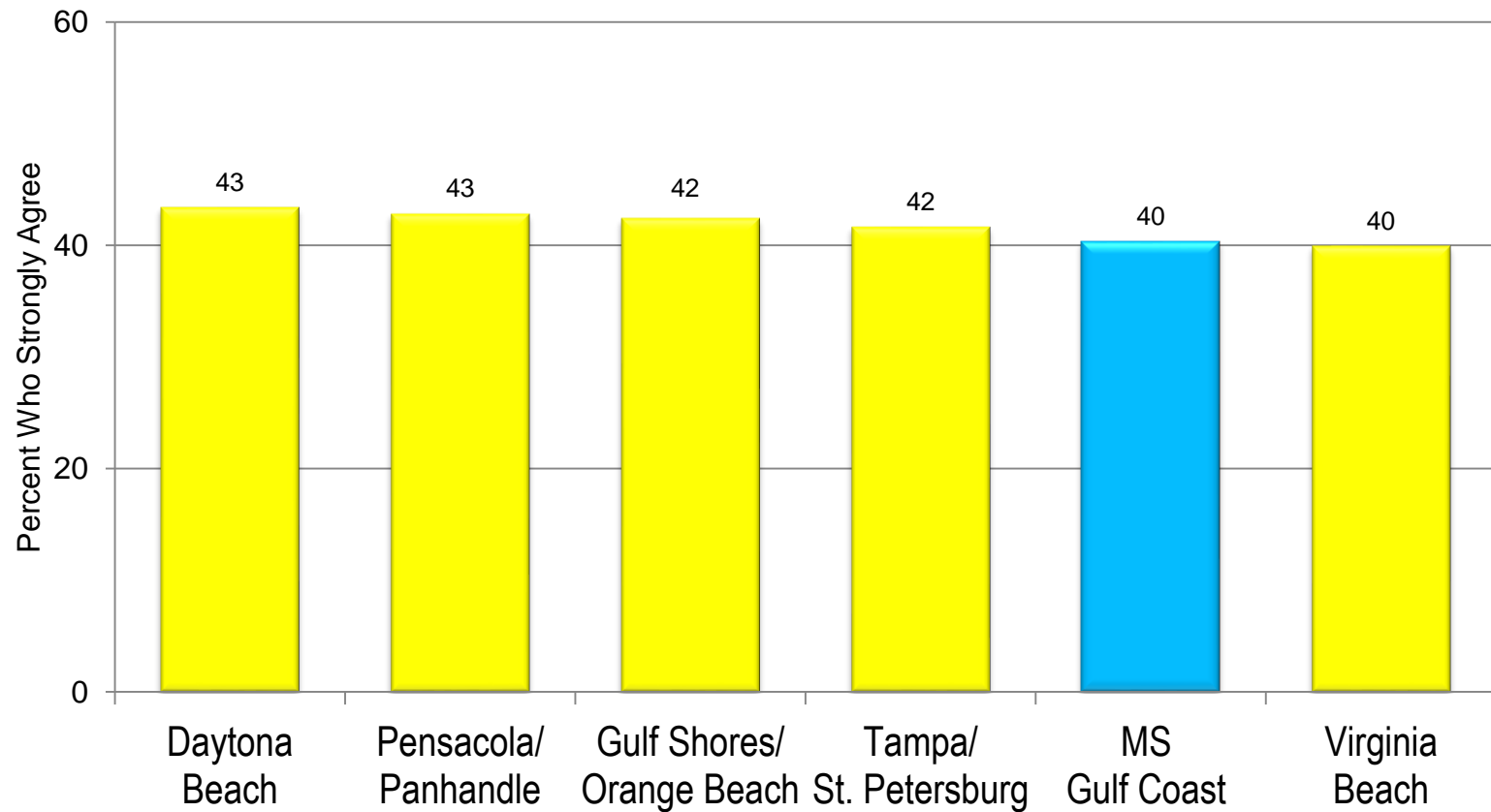
Mississippi Gulf Coast's Image vs. Competition — Adult Destination



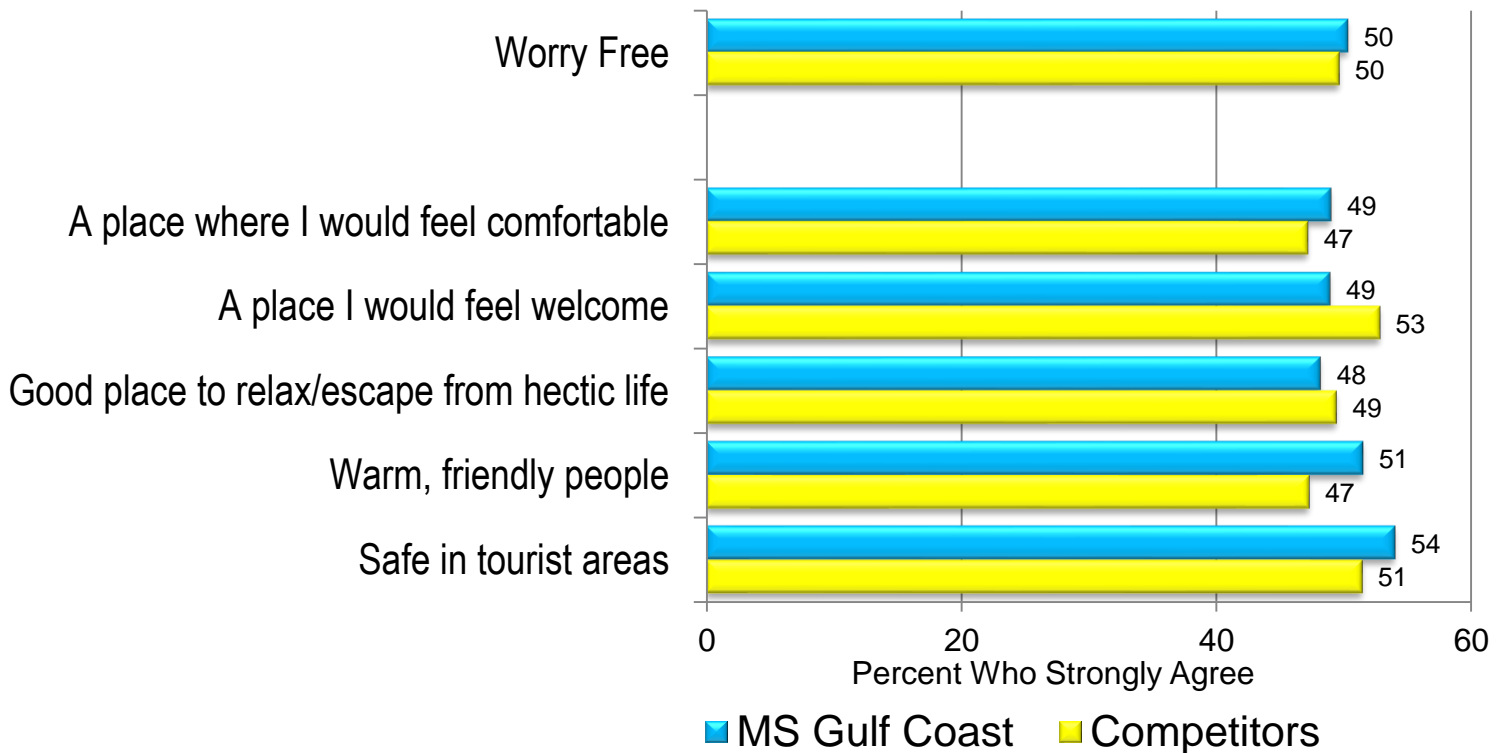
Mississippi Gulf Coast's Image vs. Competition — Unique



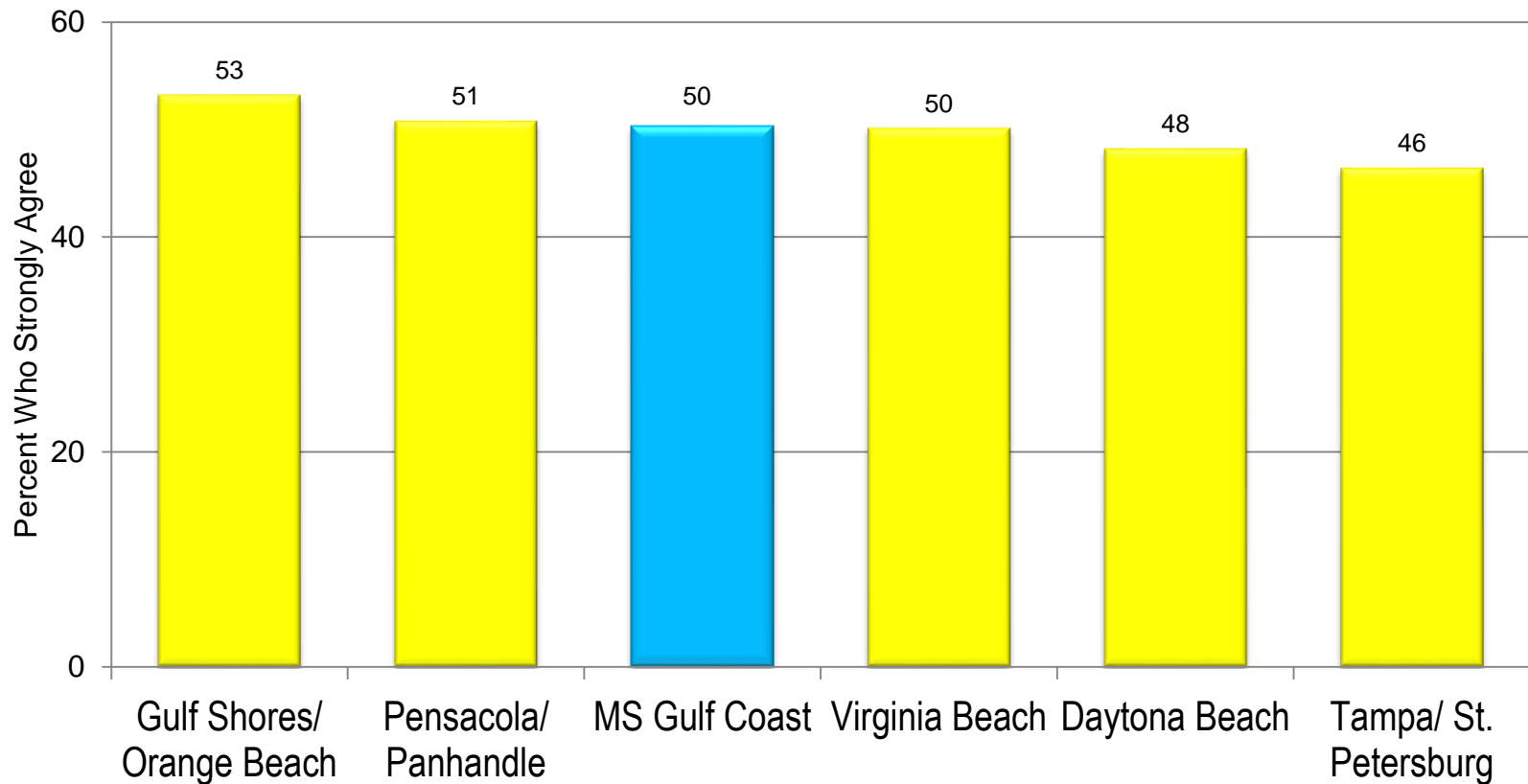
Visit Mississippi Gulf Coast's Image vs. Competition — Unique



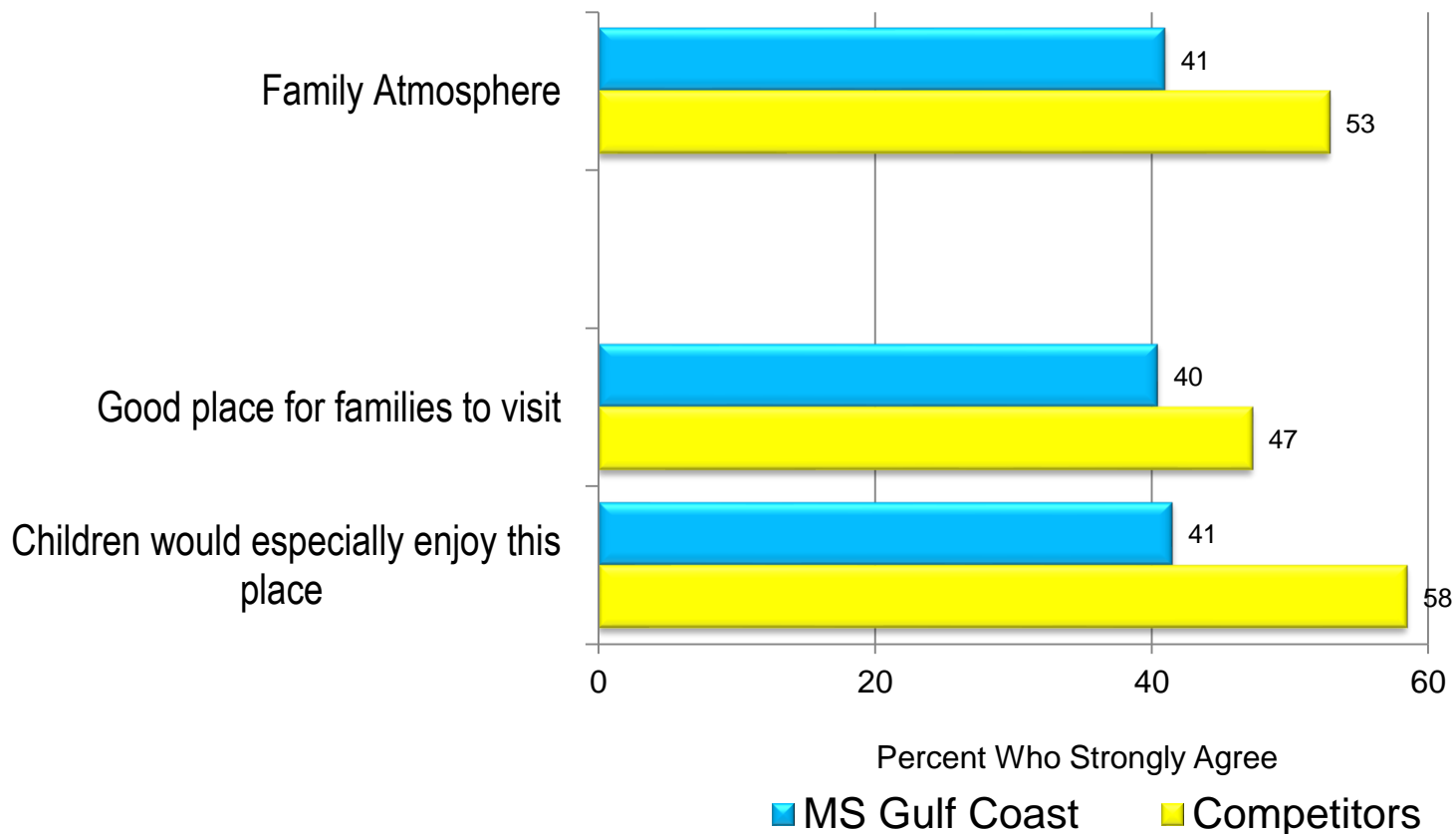
Mississippi Gulf Coast's Image vs. Competition — Worry-free



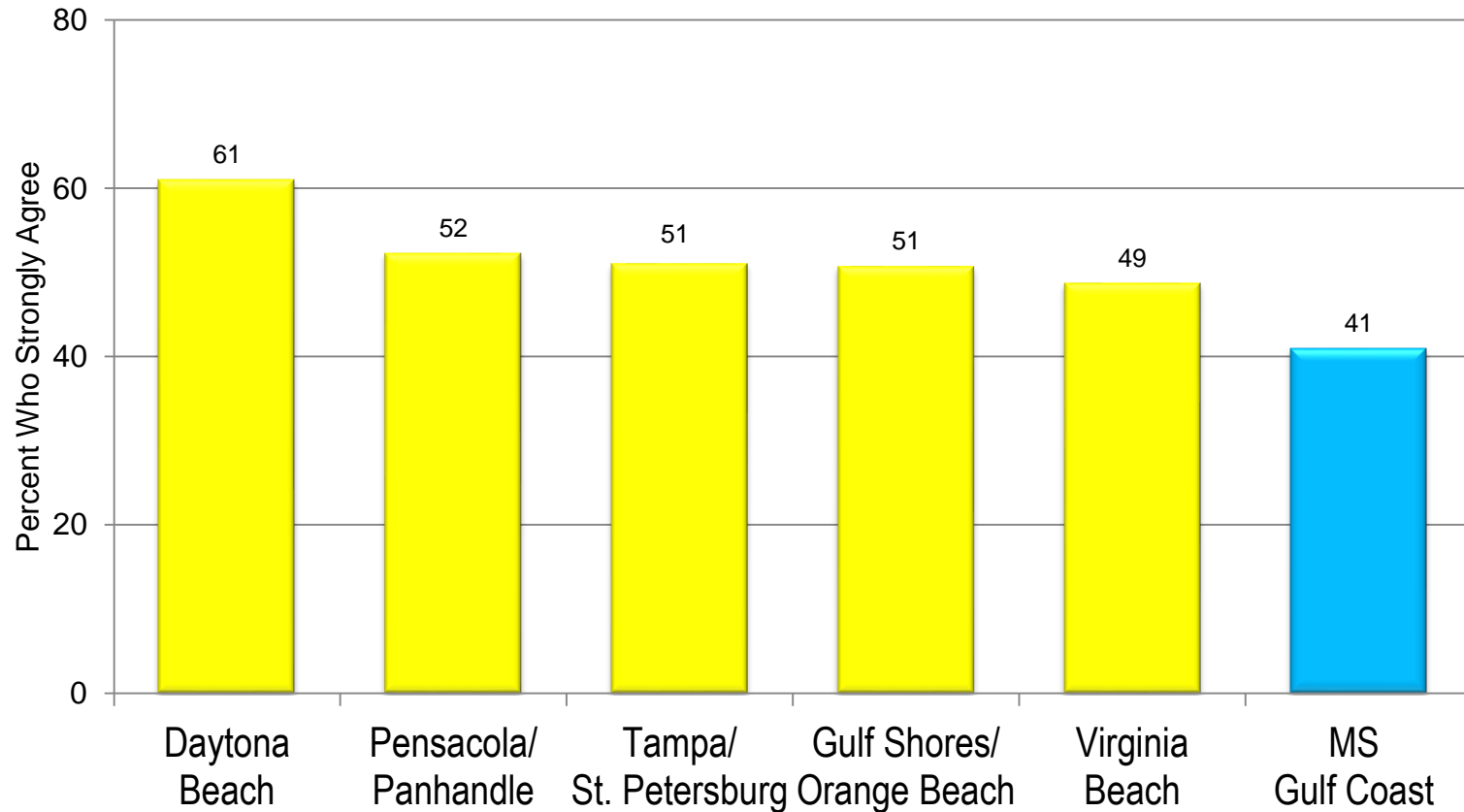
Mississippi Gulf Coast's Image vs. Competition — Worry-free



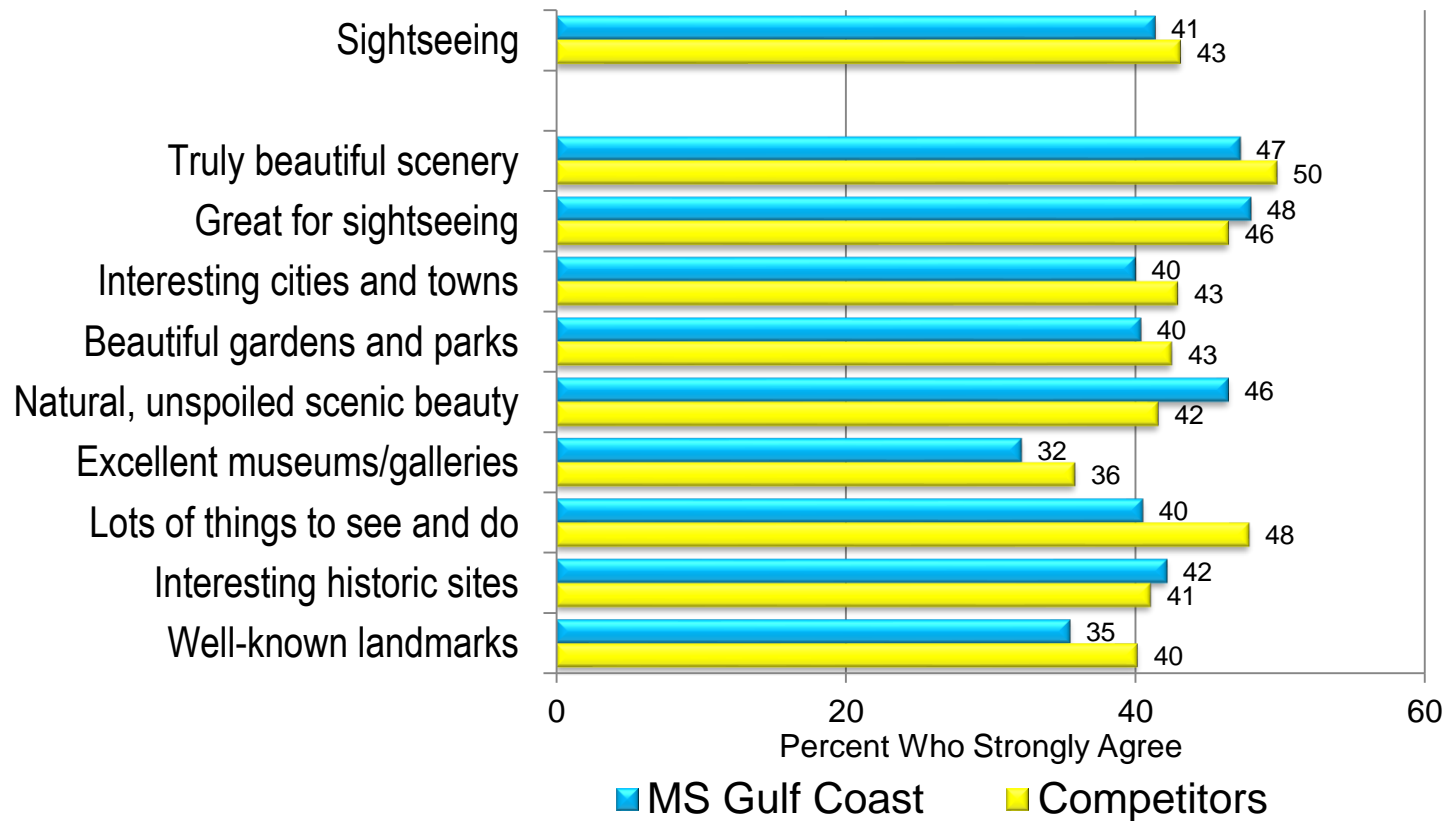
Mississippi Gulf Coast's Image vs. Competition — Family Atmosphere



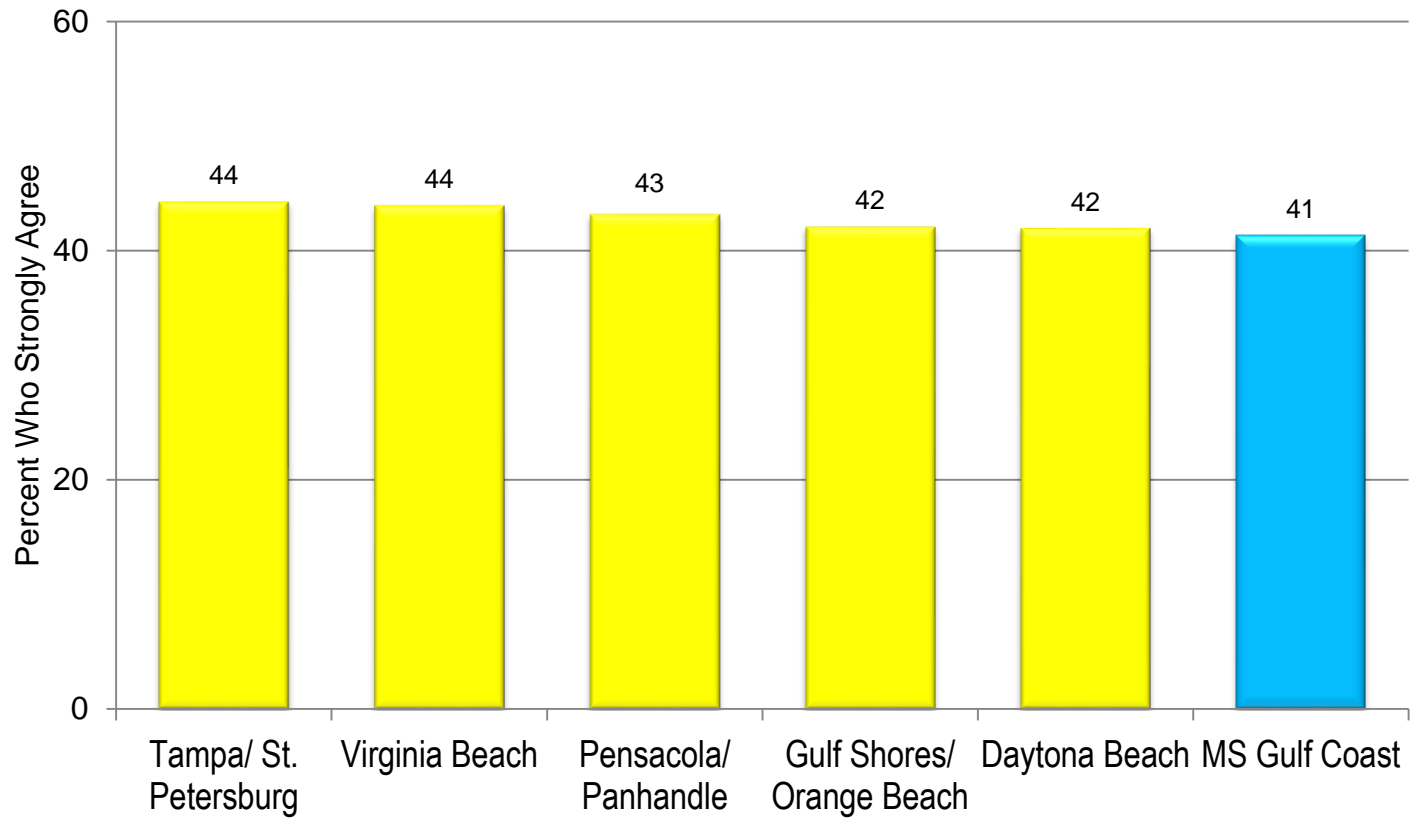
Mississippi Gulf Coast's Image vs. Competition — Family Atmosphere



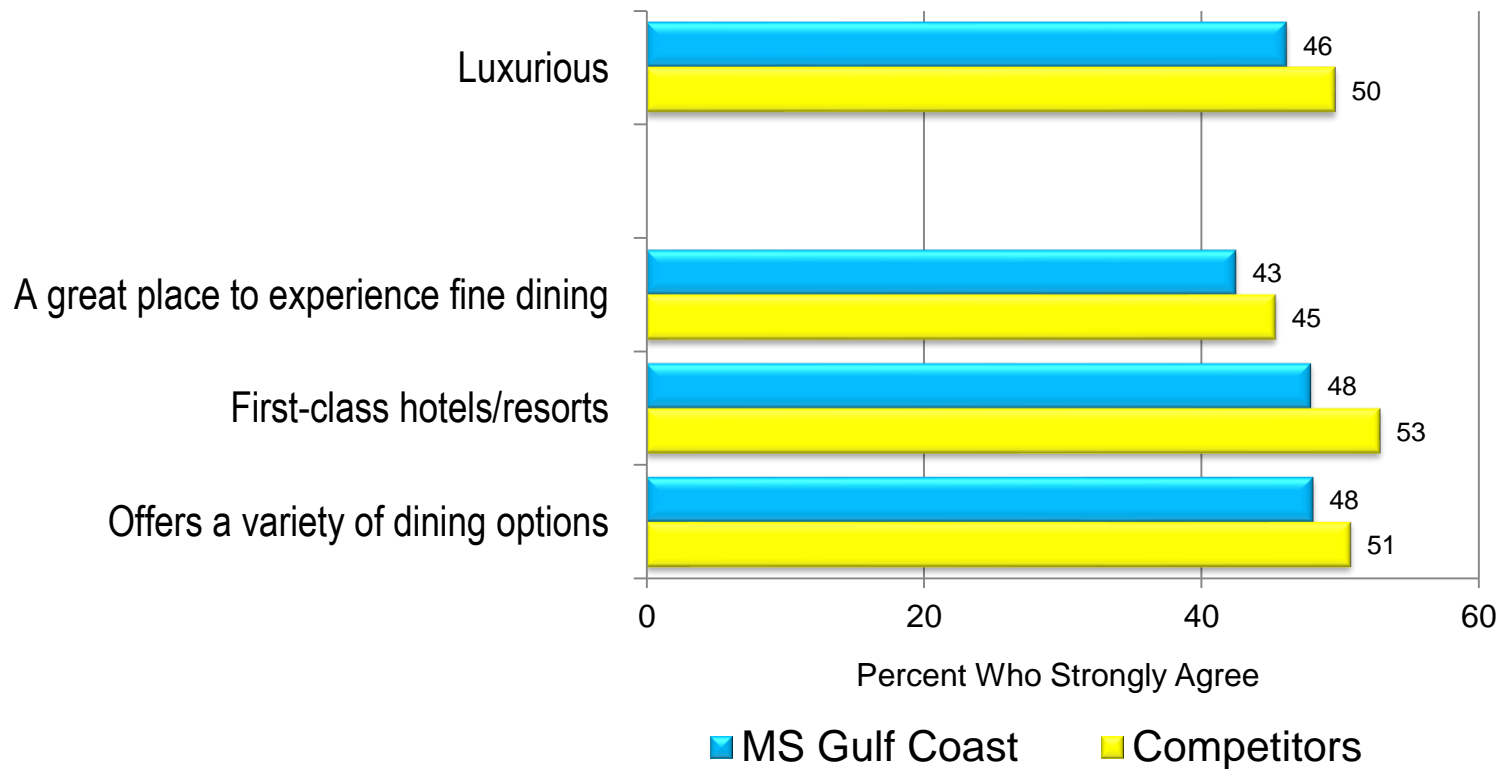
Mississippi Gulf Coast's Image vs. Competition — Sightseeing



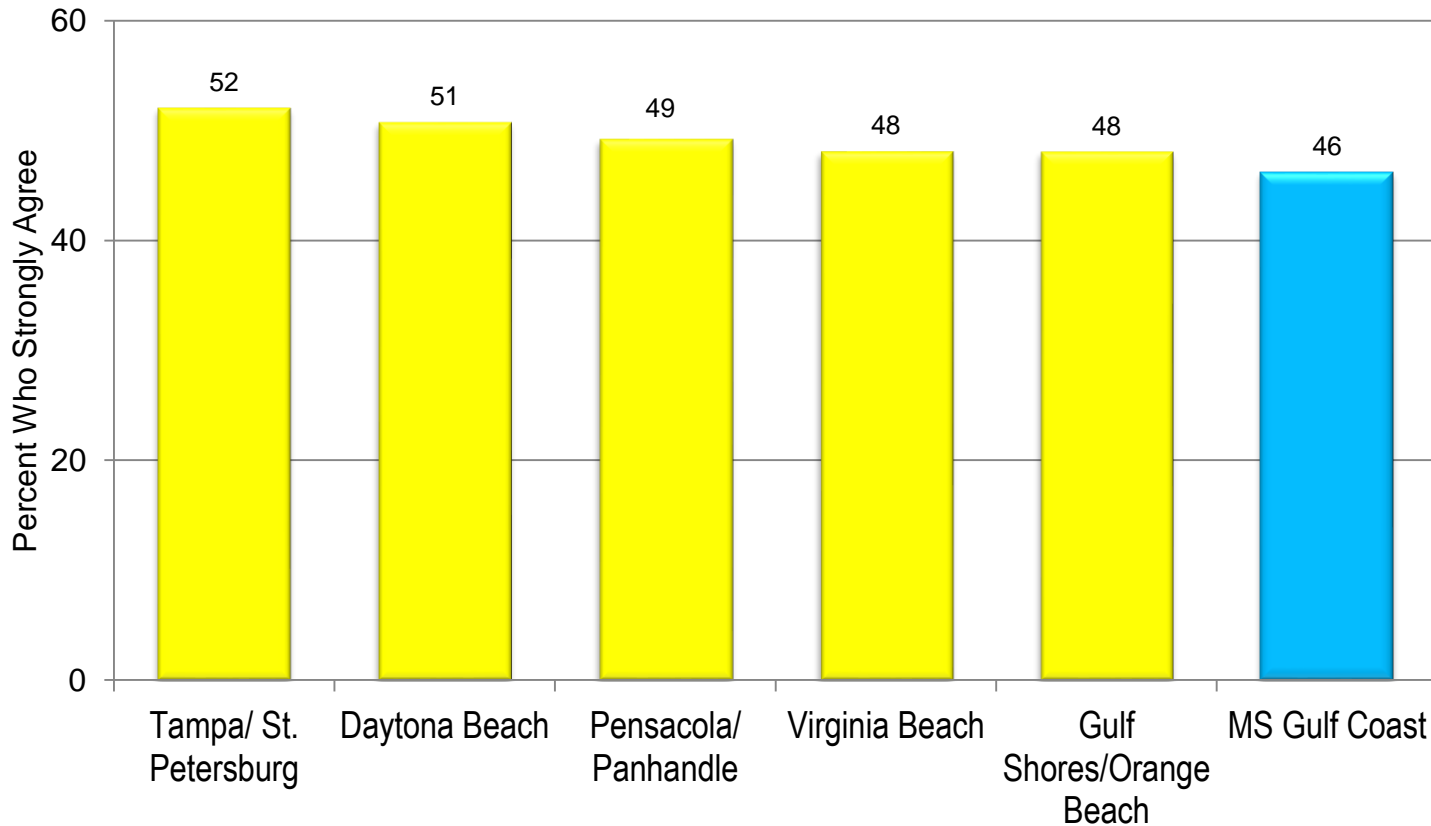
Mississippi Gulf Coast's Image vs. Competition — Sightseeing



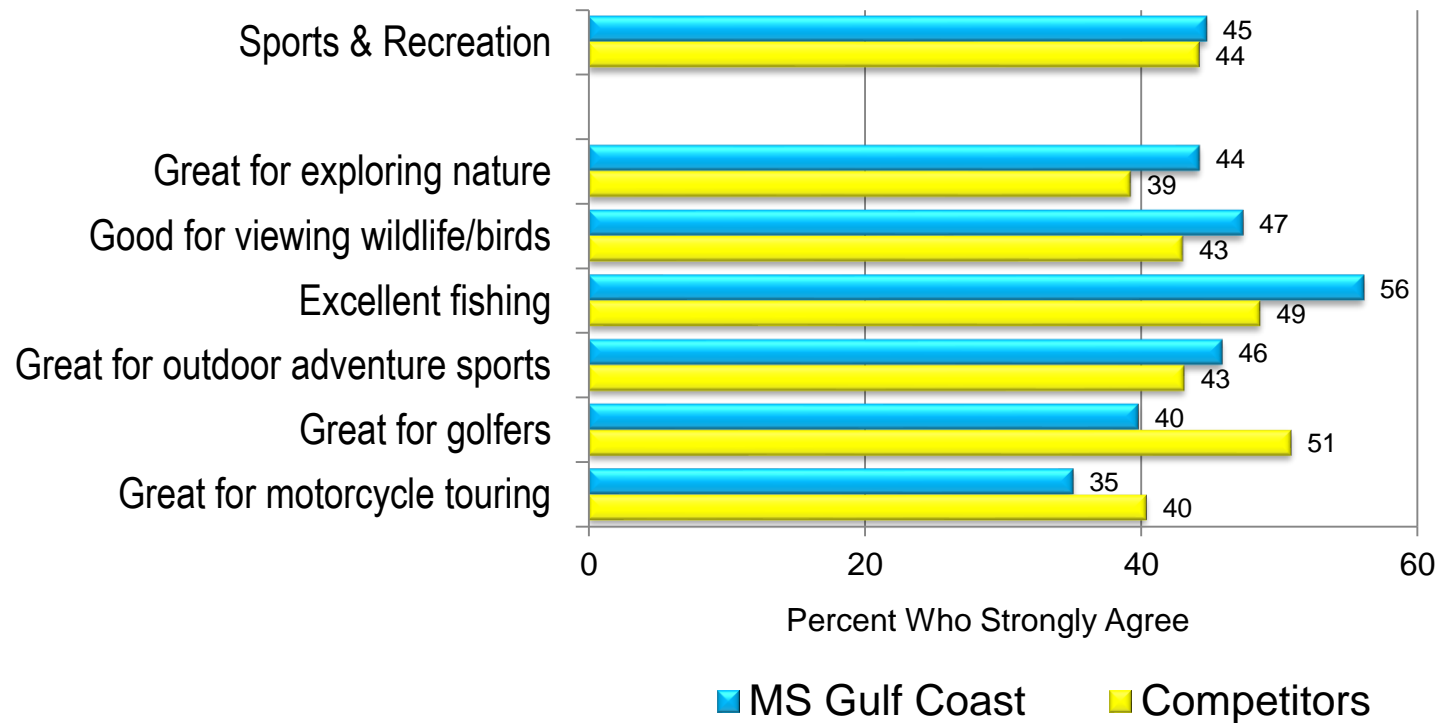
Mississippi Gulf Coast's Image vs. Competition — Luxurious



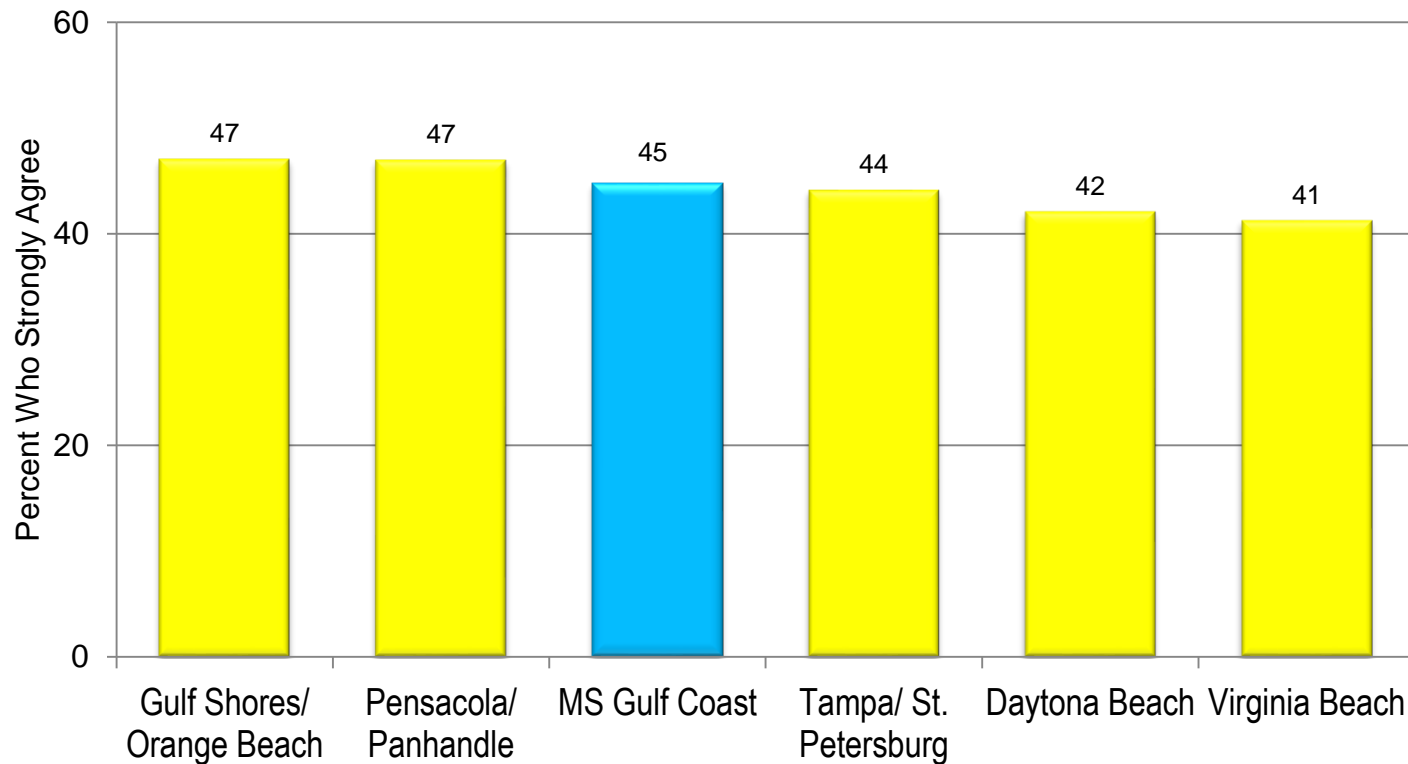
Mississippi Gulf Coast's Image vs. Competition — Luxurious



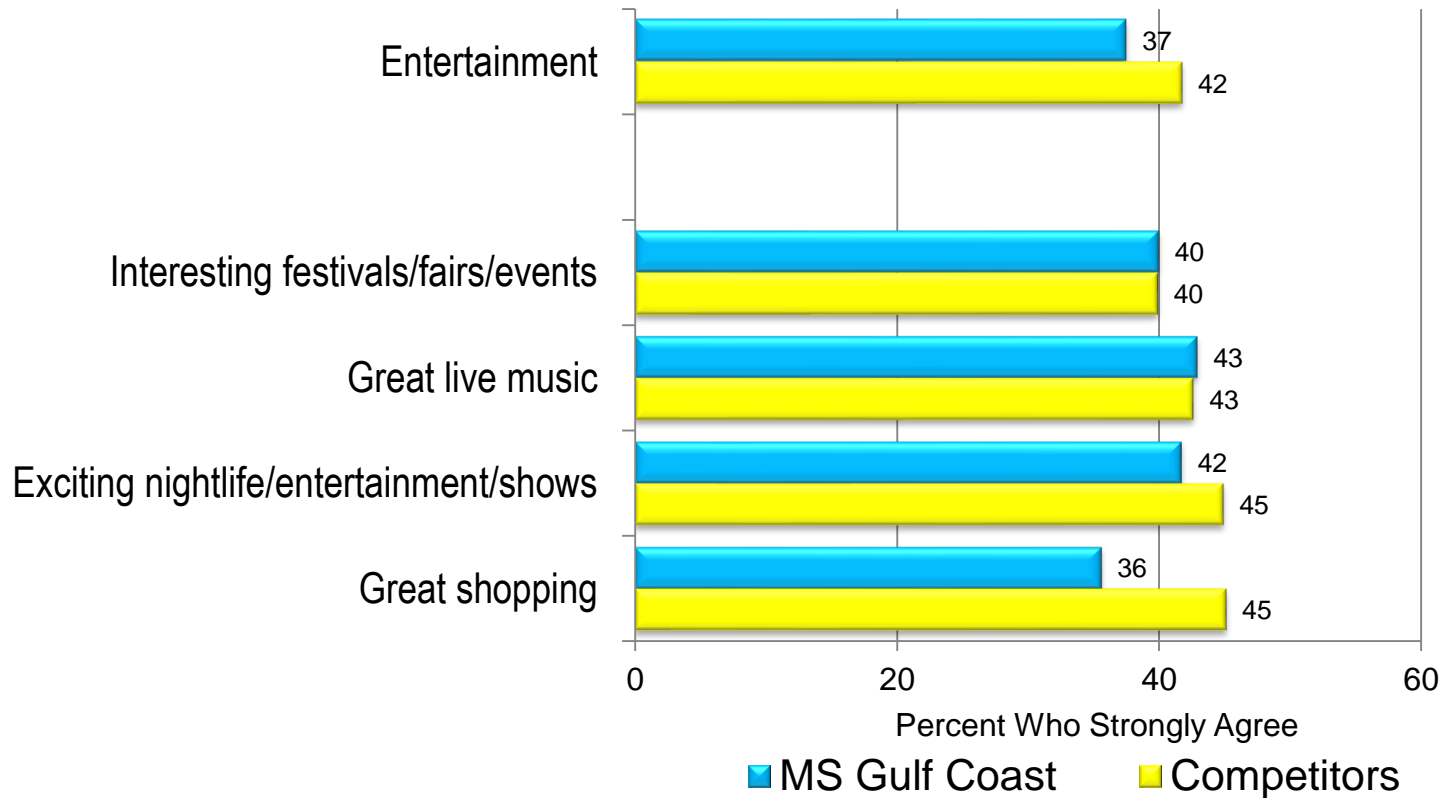
Mississippi Gulf Coast's Image vs. Competition — Sports & Recreation



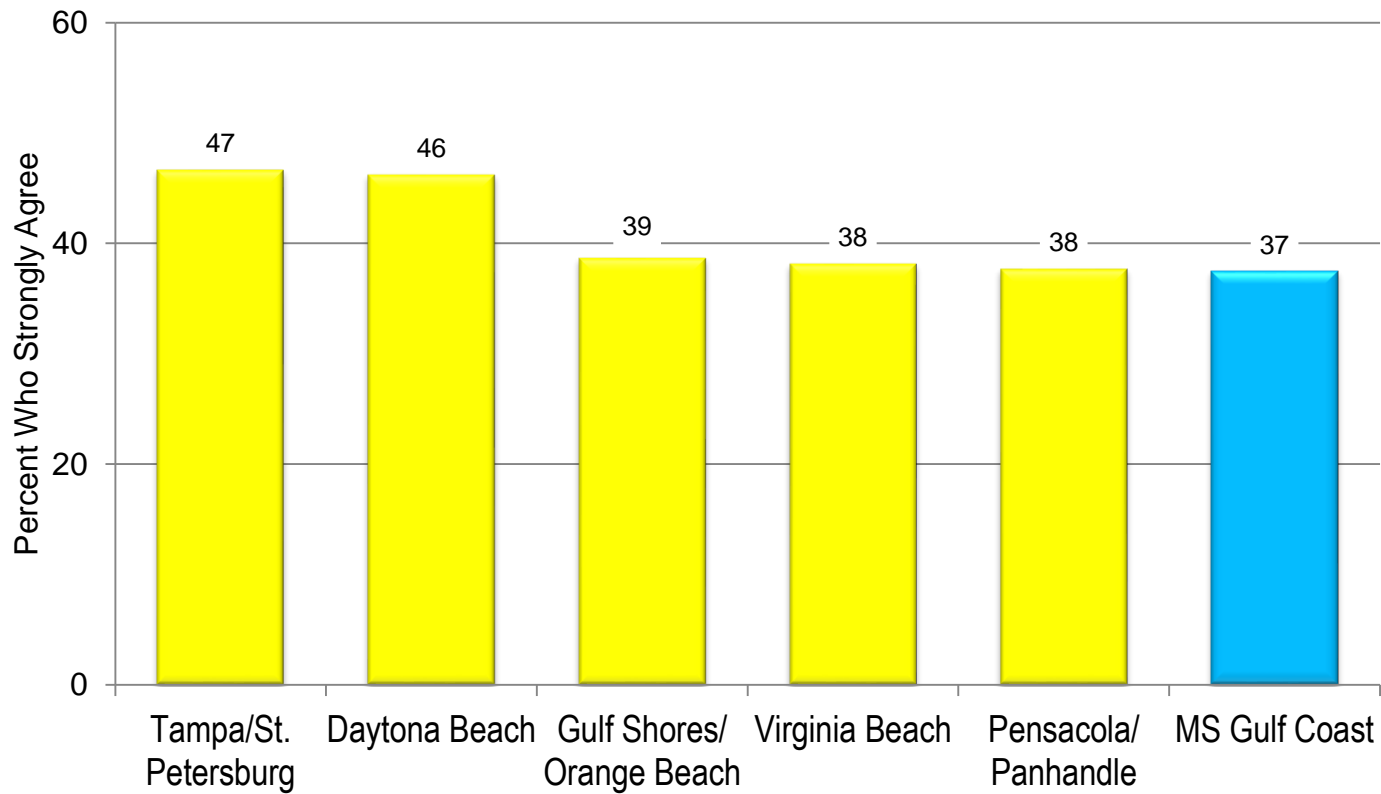
Visit Mississippi Gulf Coast's Image vs. Competition — Sports & Recreation



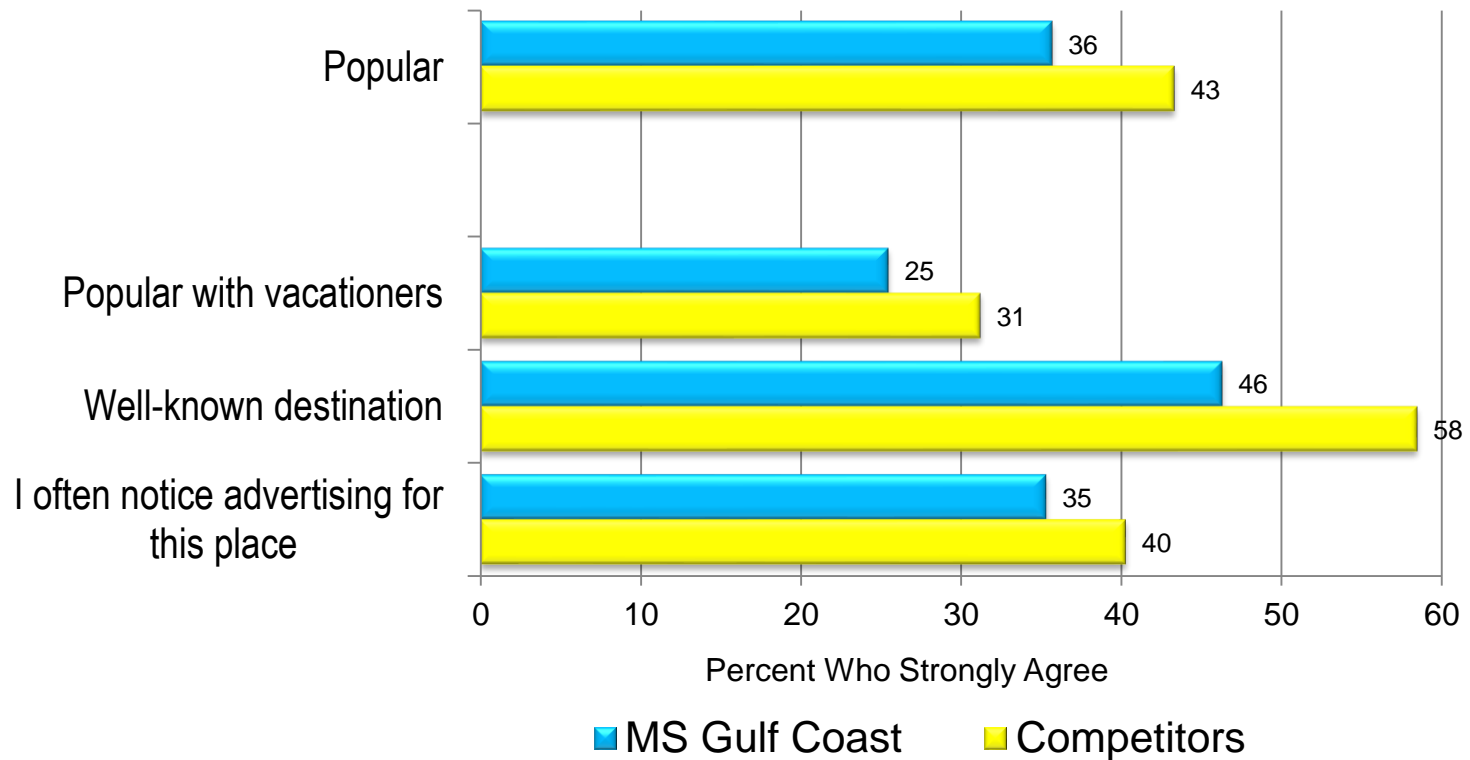
Mississippi Gulf Coast's Image vs. Competition — Entertainment



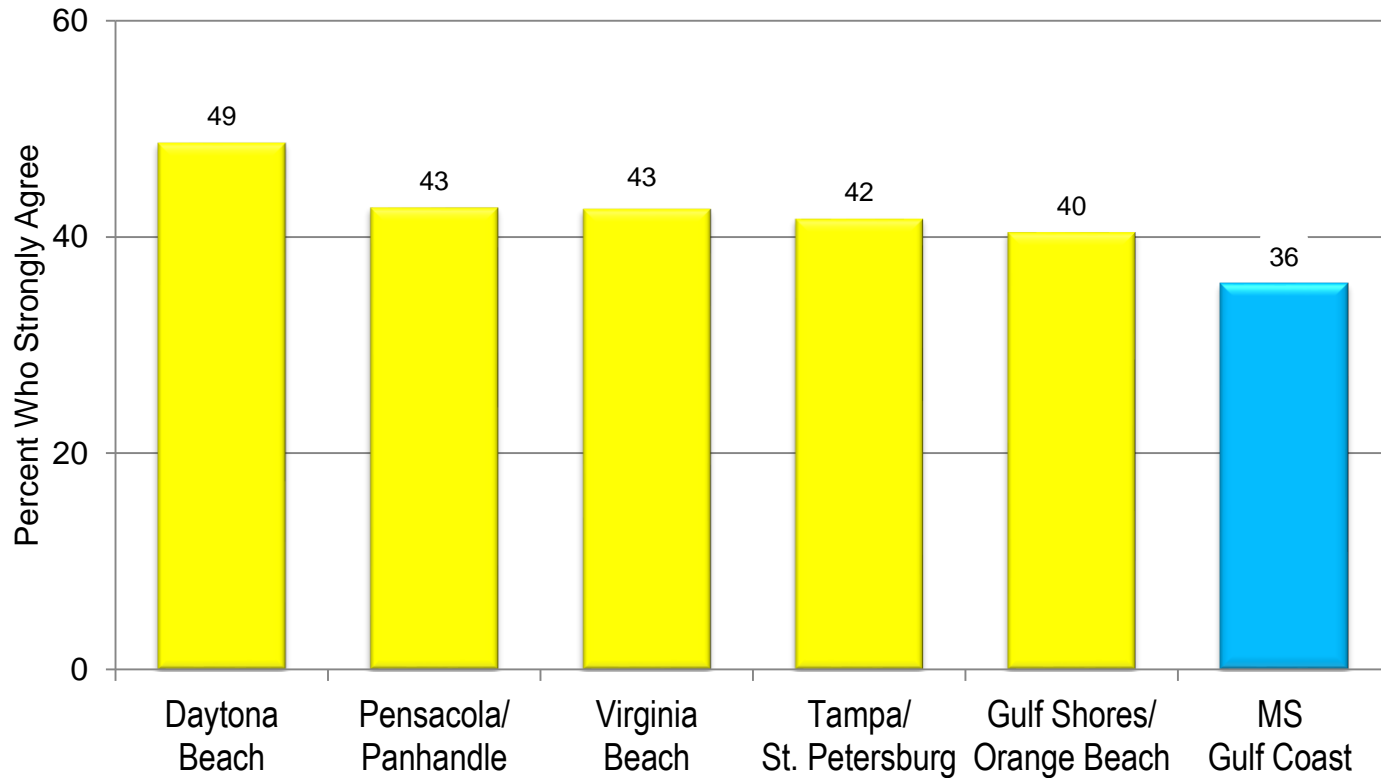
Mississippi Gulf Coast's Image vs. Competition — Entertainment



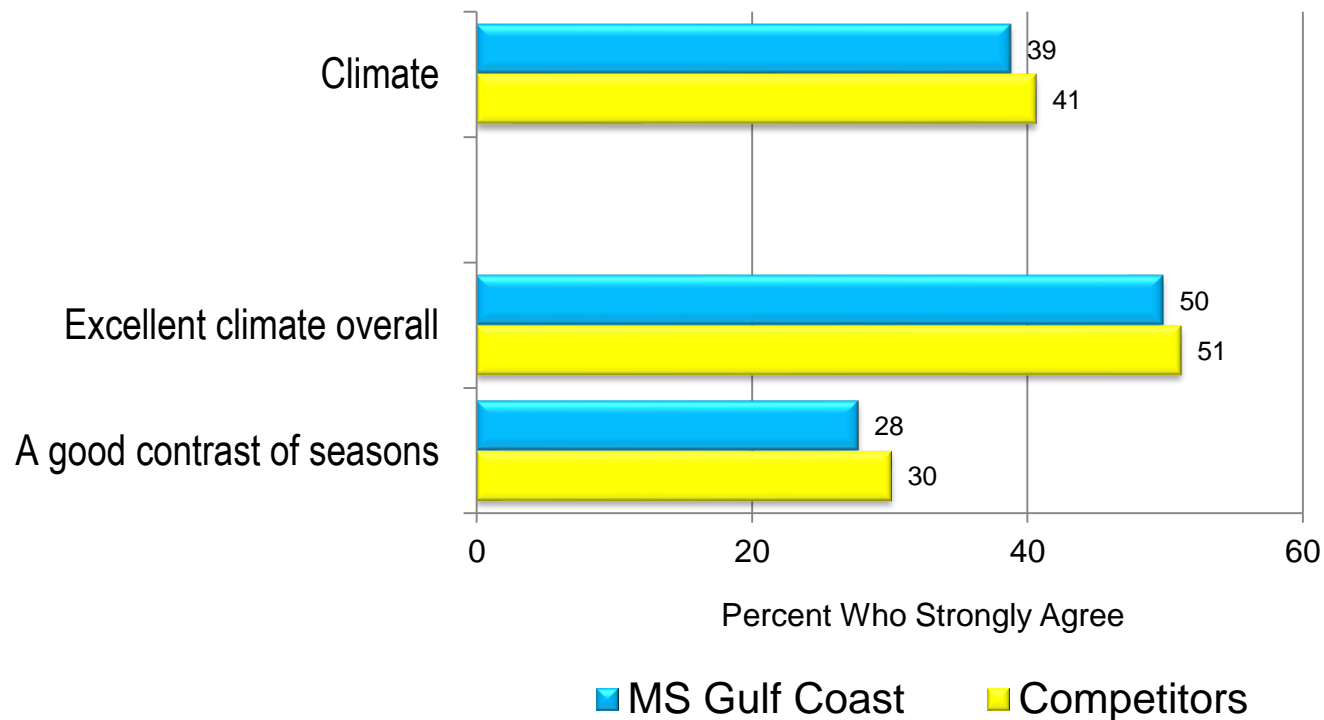
Mississippi Gulf Coast's Image vs. Competition — Popular



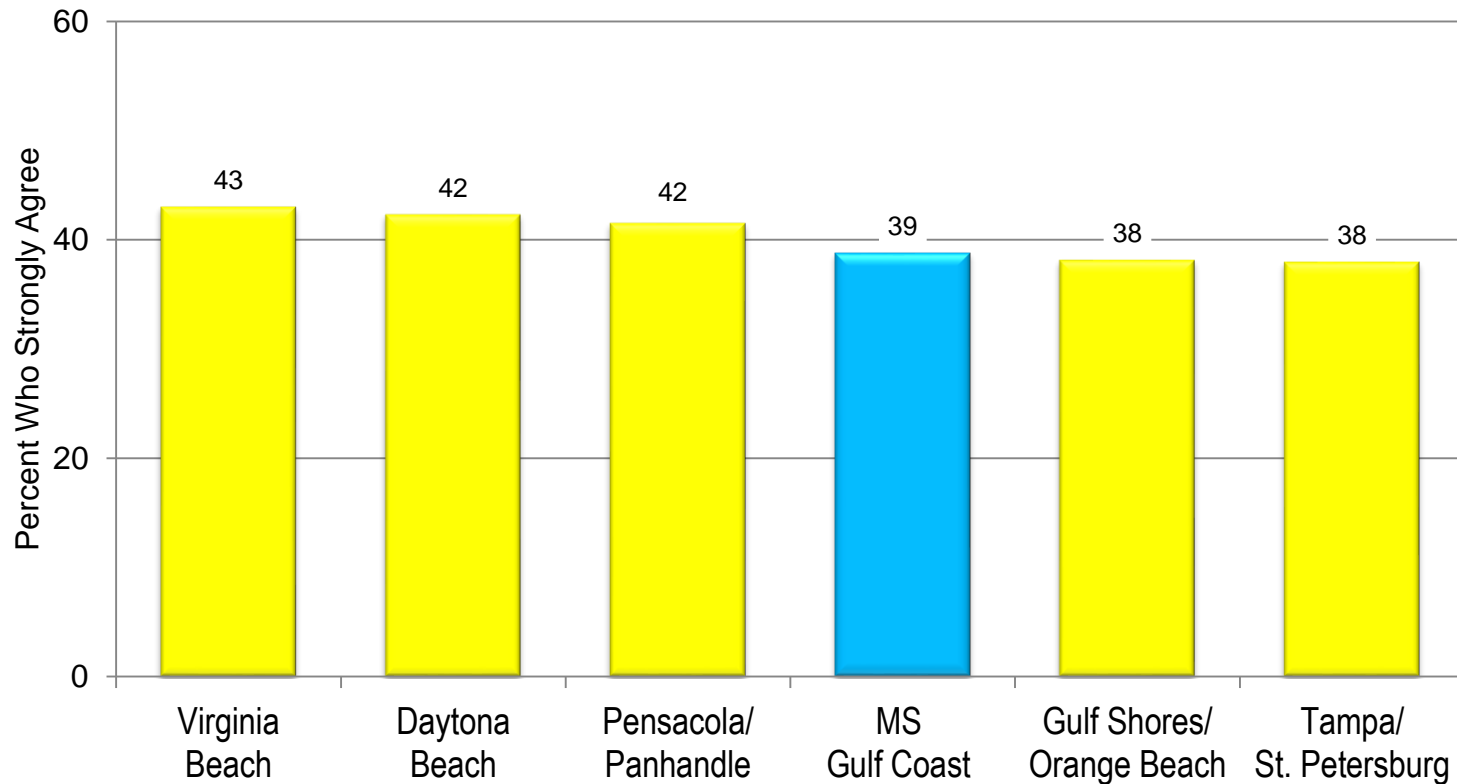
Mississippi Gulf Coast's Image vs. Competition — Popular



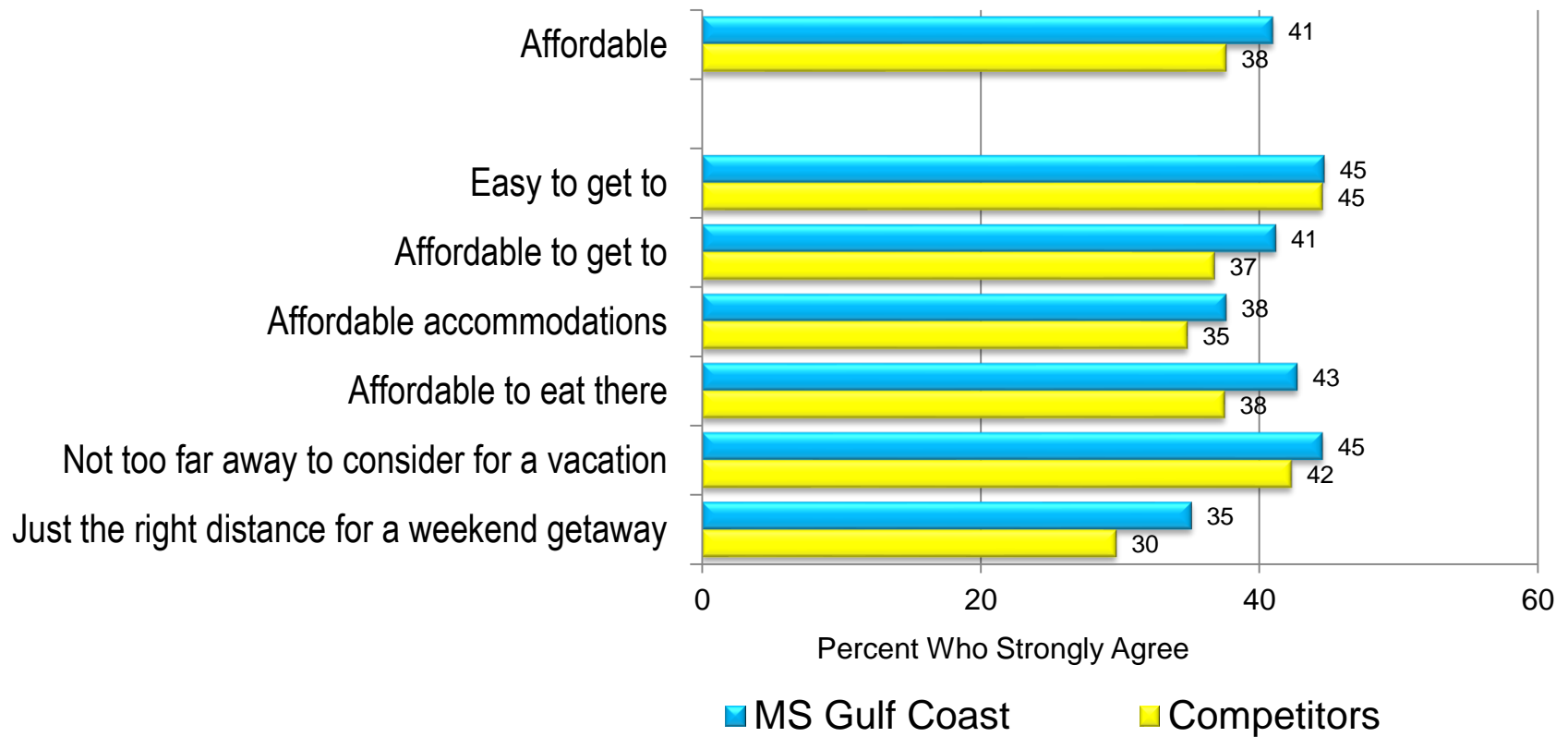
Mississippi Gulf Coast's Image vs. Competition — Climate



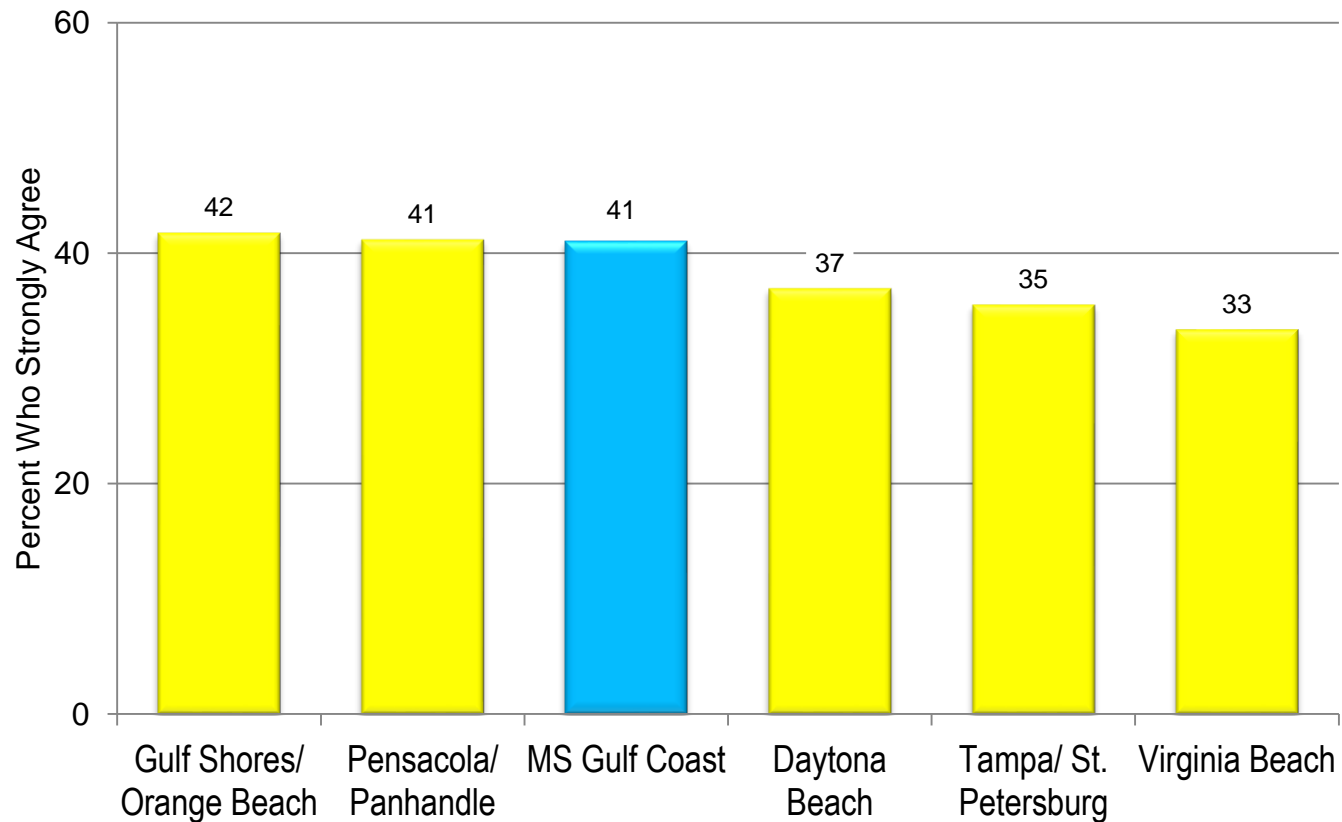
Mississippi Gulf Coast's Image vs. Competition — Climate



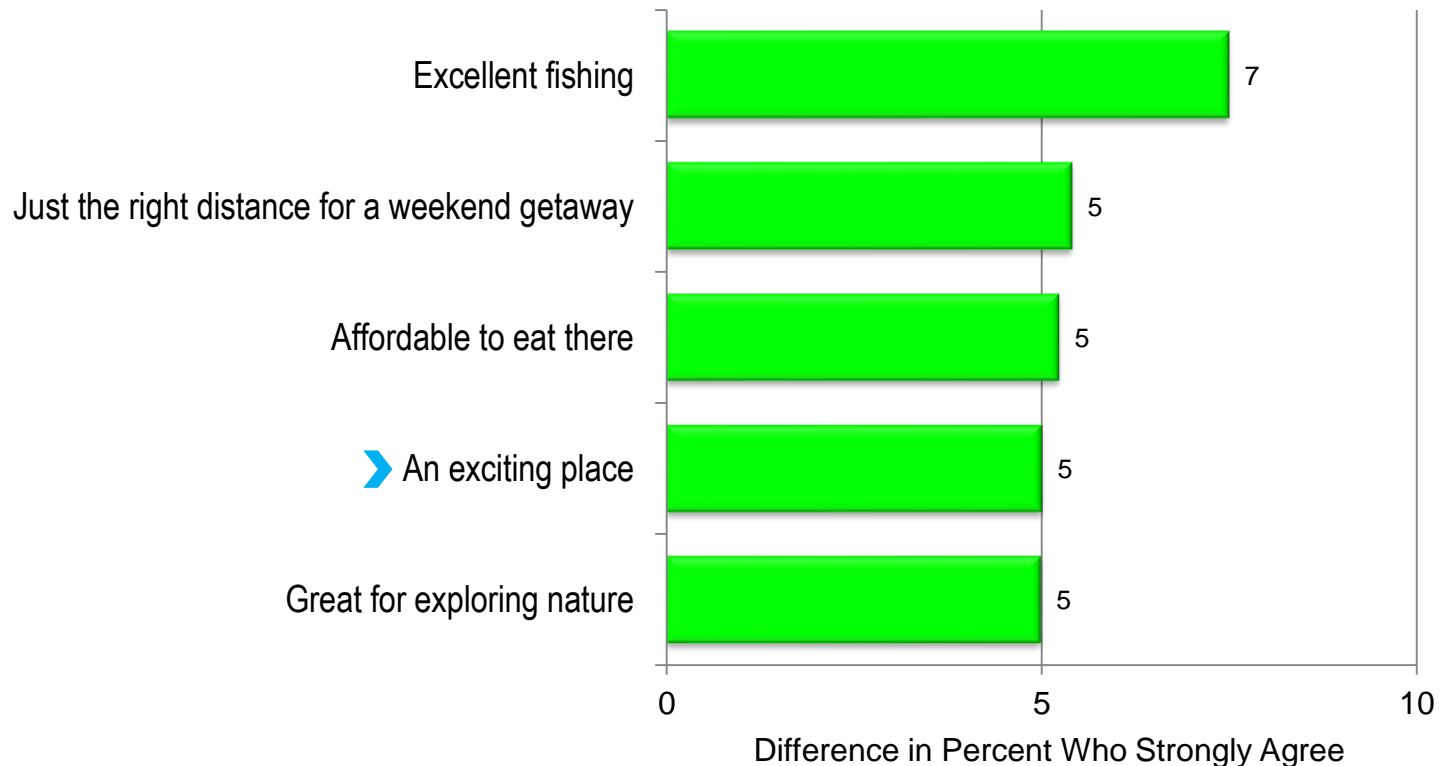
Mississippi Gulf Coast's Image vs. Competition — Affordable



Mississippi Gulf Coast's Image vs. Competition — Affordable

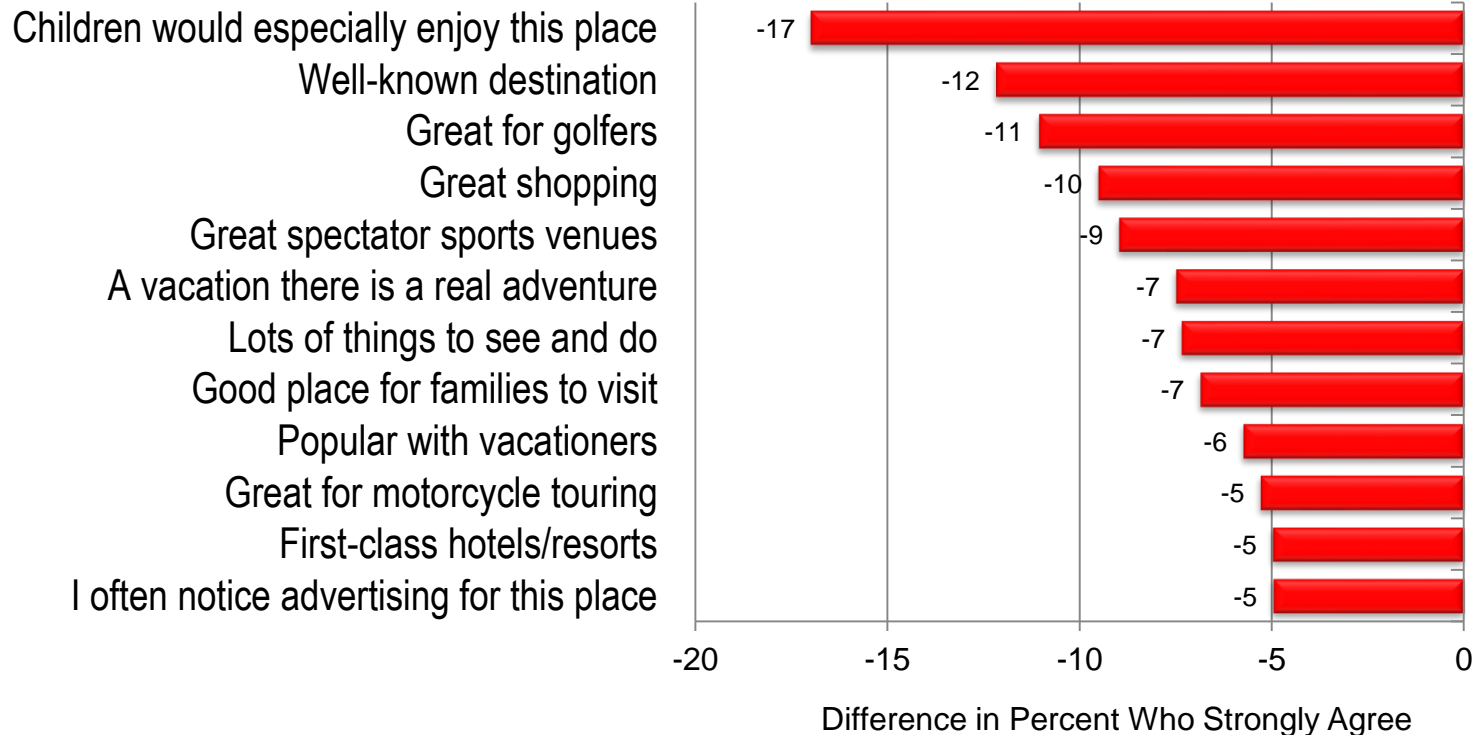


Mississippi Gulf Coast's Image Strengths vs. Competition



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Mississippi Gulf Coast's Image Weaknesses vs. Competition





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Visit Mississippi
Gulf Coast's
Product Delivery

Product Delivery

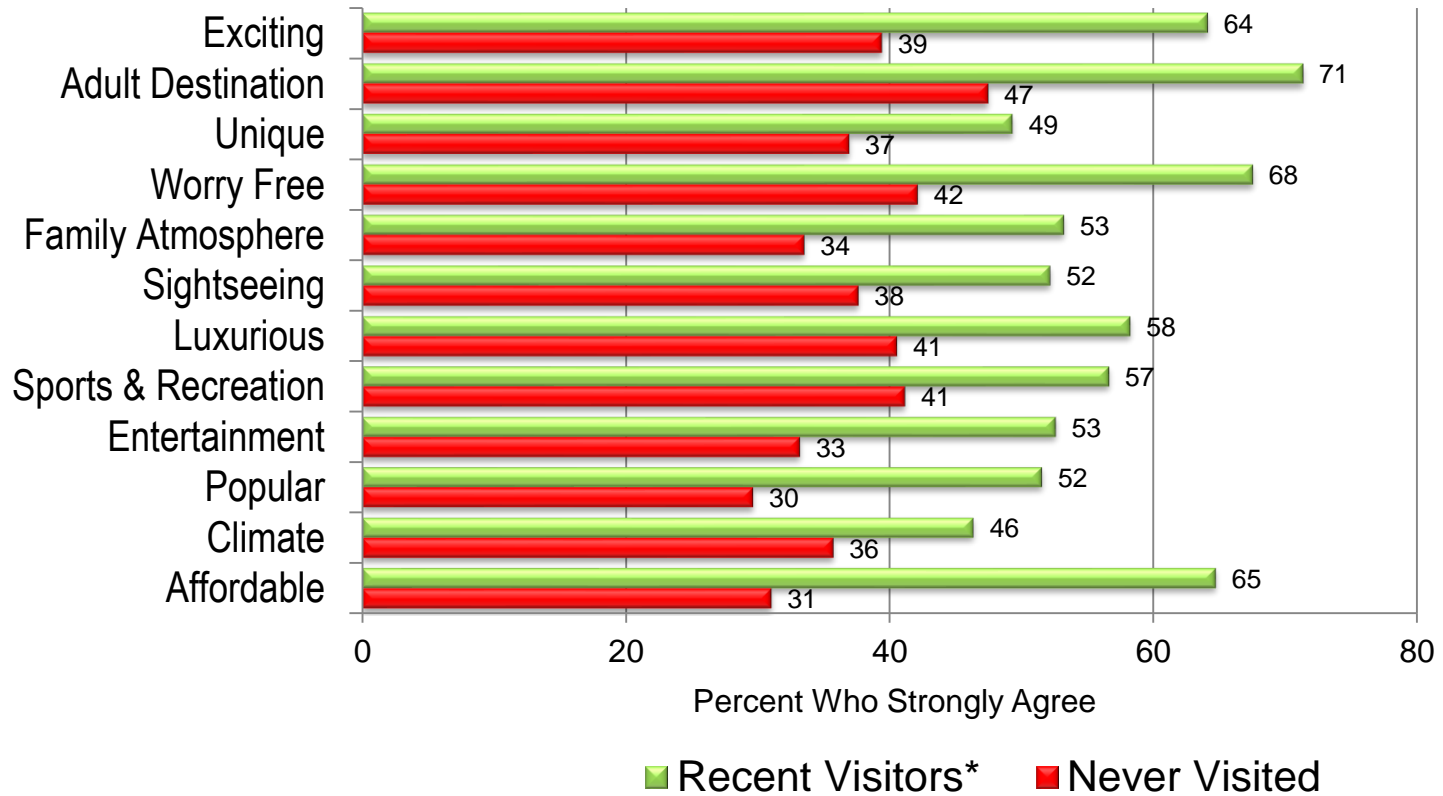
- When we compare the image ratings of people who have not visited the Mississippi Gulf Coast recently versus the ratings of those who have visited in the past two years, we have a measure of “product delivery”, i.e., the relative satisfaction of the visitor group in comparison to the “pure image” of the non-visitors.
- What is particularly noteworthy about the two sets of ratings is the sheer size of the differences between them:
 - ✓ On almost all variables, there is at least a 10% “lift” created by experience visiting the Mississippi Gulf Coast, and for about half of the attributes, the differences were between 20% and 30%.
 - ✓ This means that visitors were genuinely surprised by what they found and experienced in the Mississippi Gulf Coast, in a very positive way.

Product Delivery

- From this analysis we find that people who have experienced the Mississippi Gulf Coast recently were especially impressed with:
 - ✓ Affordability – easy to get there, affordable accommodations and dining.
 - ✓ Worry-free – easy to get around, safe, friendly and good place to relax.
 - ✓ Excitement – being a place that is exciting and everyone should visit at least once.
 - ✓ Suitability for adults.
 - ✓ Popular with vacationers.

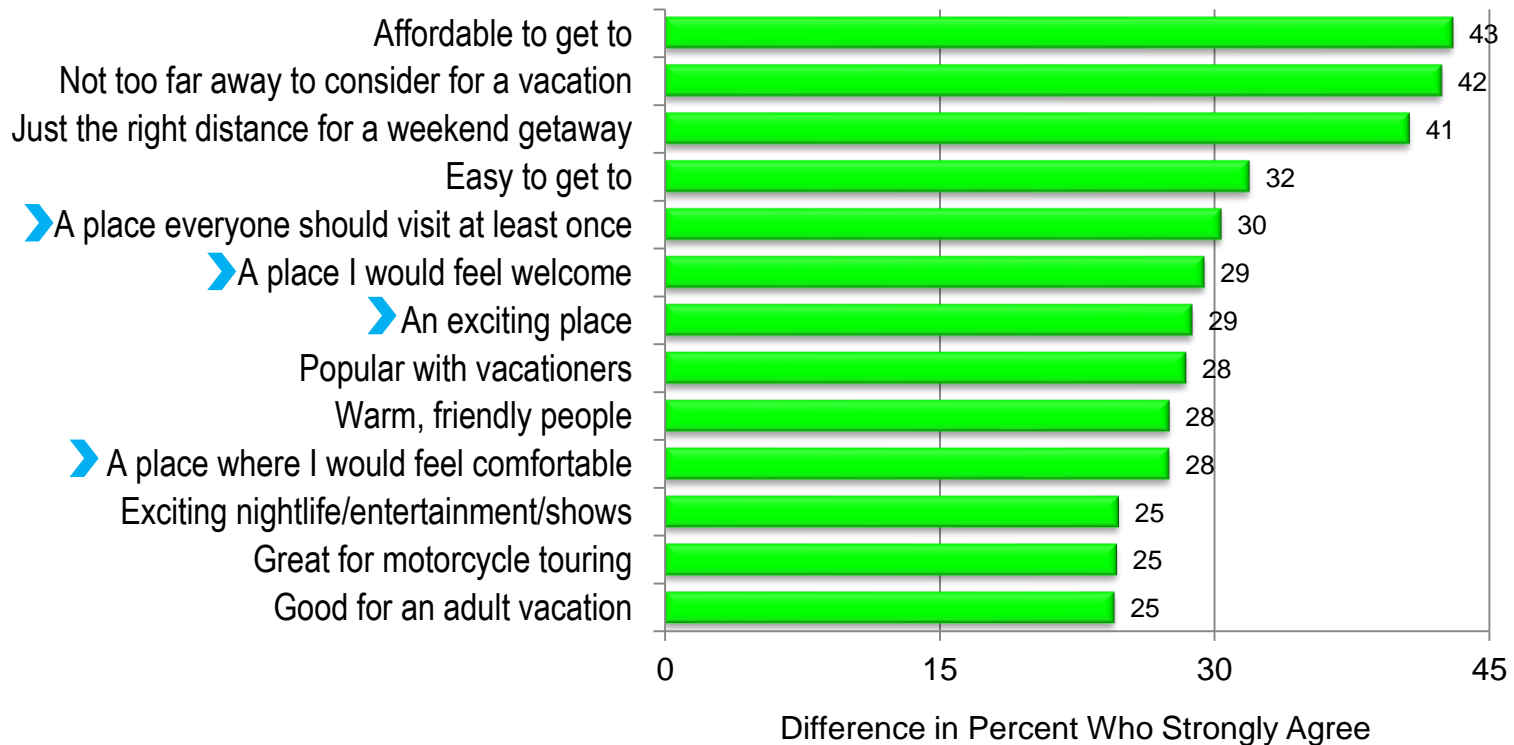
- Among the dimensions evaluated, there no areas where visitors felt the Mississippi Gulf Coast failed to live up to expectations.

Mississippi Gulf Coast's Product vs. Image



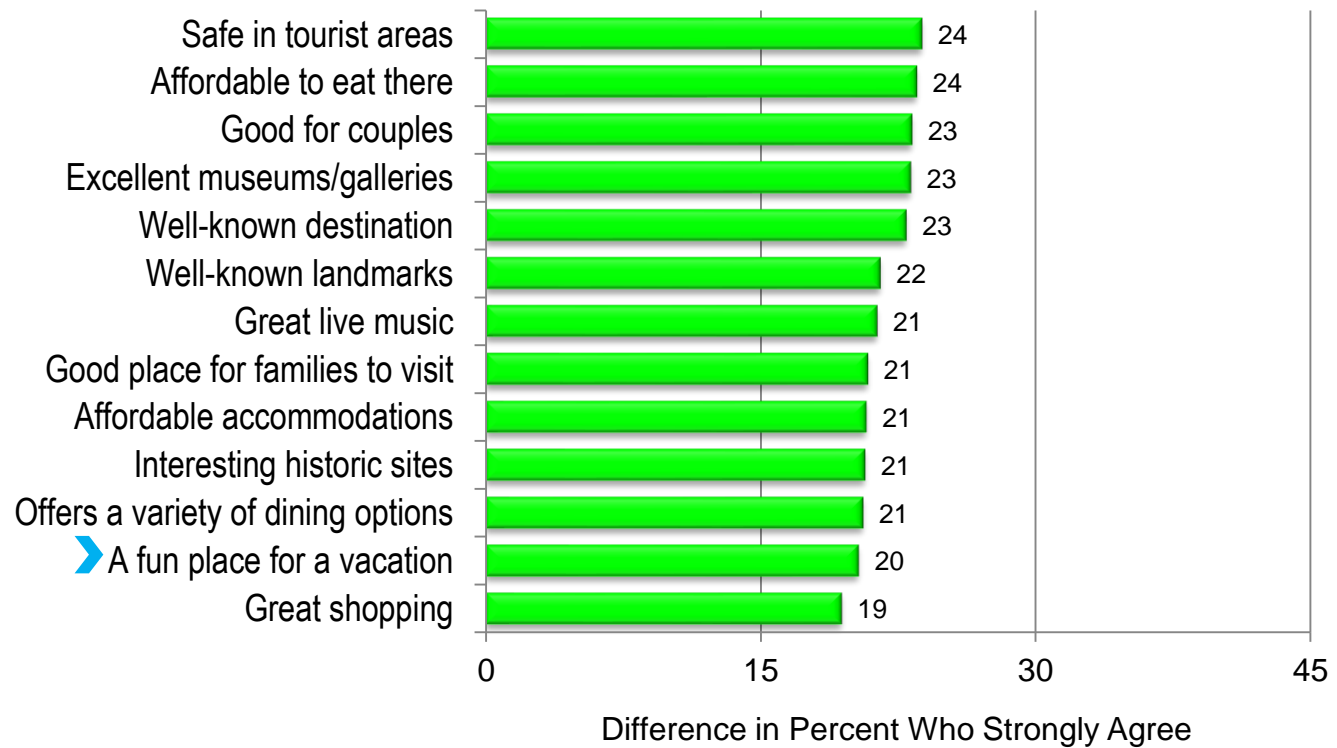
* Visited in the past 2 years

Top Product Strengths vs. Image



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Top Product Strengths vs. Image (Cont'd)



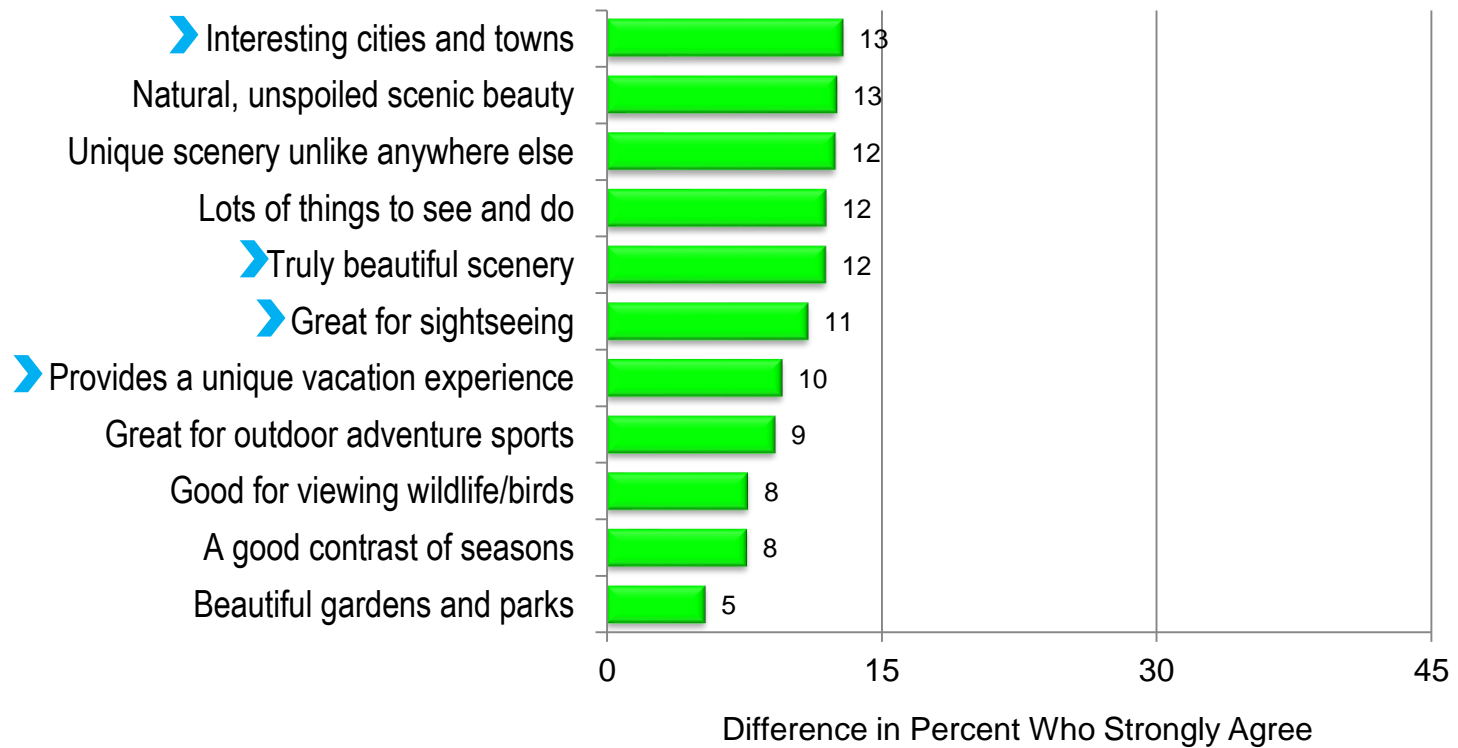
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Top Product Strengths vs. Image (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Top Product Strengths vs. Image (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Top Product Weaknesses vs. Image

**THERE WERE NO SIGNIFICANT
PERCEIVED PRODUCT
WEAKNESSES VS. IMAGE**



Halo Effect on Economic Development Image

Halo Effect Analysis

- Research has long demonstrated that tourism advertising and the visitation it inspires have a positive impact on consumers' image of destinations as a place for leisure travel and recreation.
- Applying the psychological concept of the “halo effect” to tourism promotion advertising, Longwoods set out to determine if gains in image for Mississippi Gulf Coast from its tourism advertising would extend beyond the appeal as a place to visit. Could it be that economic objectives could also be achieved, such as viewing Mississippi Gulf Coast more favorably as a place to live, work, start a business, attend college, purchase a vacation home and retire?
- Longwoods International has conducted this research for multiple state and city destinations across the U.S since 2014.

Halo Effect Analysis

- The research compared consumers' ratings of Mississippi Gulf Coast on economic development image attributes by those who had not seen the spring/summer campaign or visited Mississippi Gulf Coast with those who did see the tourism ads and/or visited.
- In almost every case, Visit Mississippi Gulf Coast's tourism advertising and subsequent visitation significantly improved the image of Mississippi Gulf Coast for a wide range of economic development objectives.

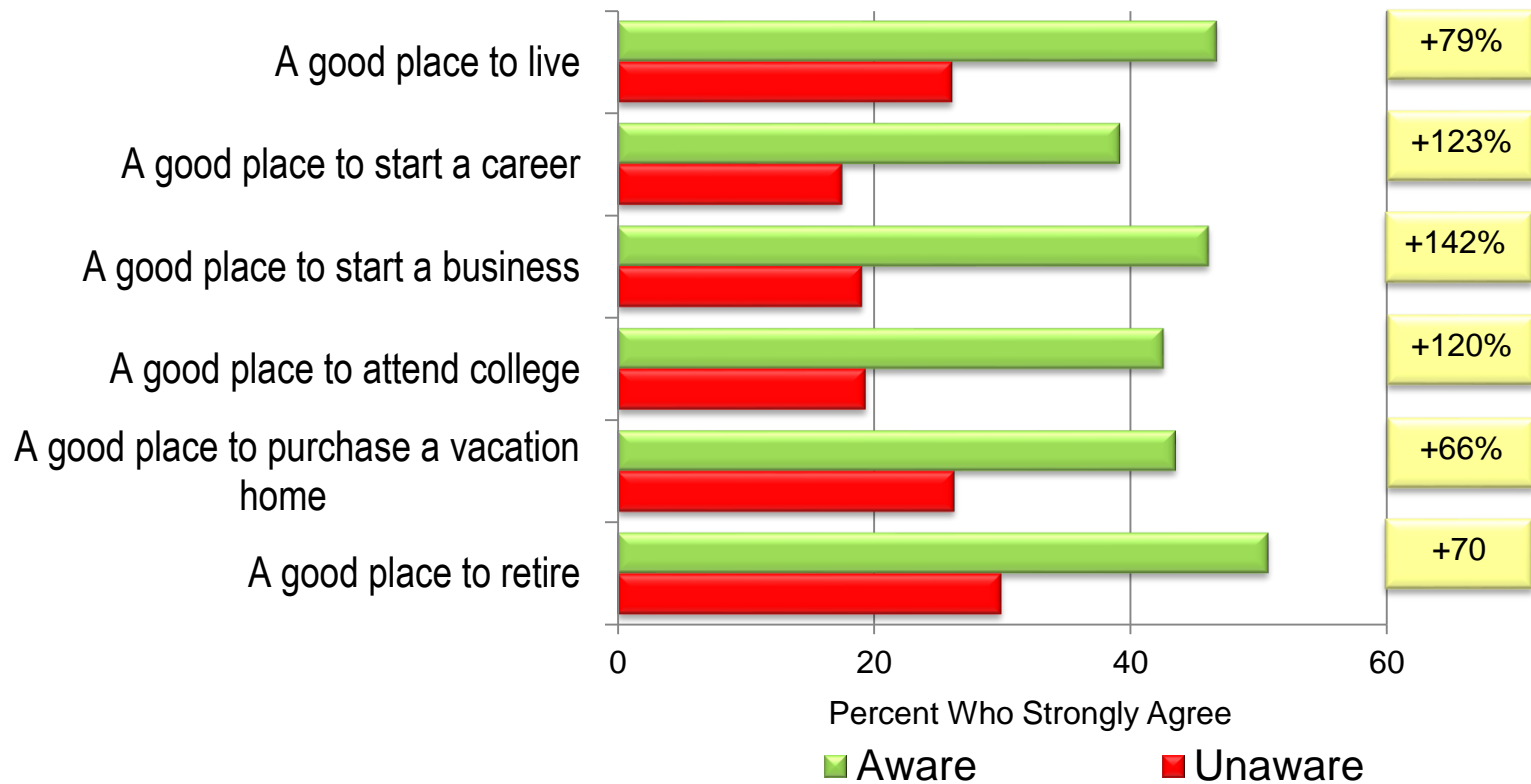
Halo Effect Analysis

- Specifically, the Visit Mississippi Gulf Coast tourism advertising campaign created especially strong image lift in three areas:
 - ✓ Those who saw the advertising were 142% more likely than those not exposed to regard Mississippi Gulf Coast as a good place to start a business, as a good place to start a career (123% lift), and as a good place to attend college (120% lift).
- To a somewhat lesser degree, the advertising also boosted people's impressions of Mississippi Gulf Coast as a good place to live (79% lift), as a good place to retire (79%), and as good place to buy a vacation home (66%).
- Actual visitation produced a positive, albeit it not as strong an effect on people's image of Mississippi Gulf Coast on the economic development "indicators":
 - ✓ Strongest lift on the "a good place to live" attribute.
 - ✓ Good lift as well on the remaining attributes except "attending college."

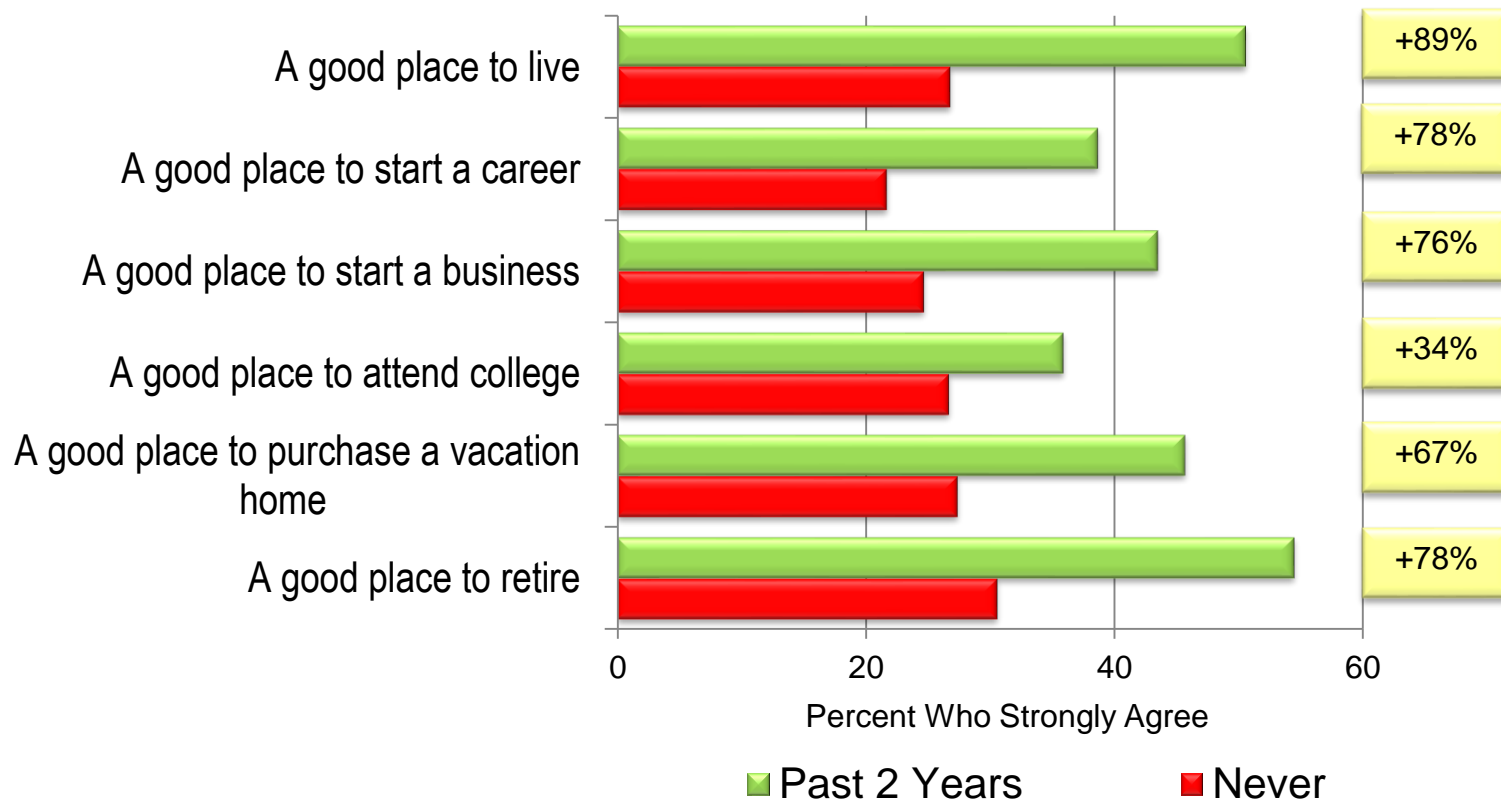
Halo Effect Analysis

- For each economic development objective, the most dramatic improvement in image was among those consumers who were both exposed to the advertising campaign message and who also visited Mississippi Gulf Coast.
- The effect of advertising plus visitation was generally more than additive, improving consumers' perceptions of Mississippi Gulf Coast by considerably more than the sum of their lifts in each area.
- For example, ad exposure plus visitation improved people's rating of Mississippi Gulf Coast as a place to start a business or a career by more than 200%, and their rating of Mississippi Gulf Coast on each of the other dimensions by more than 100%.

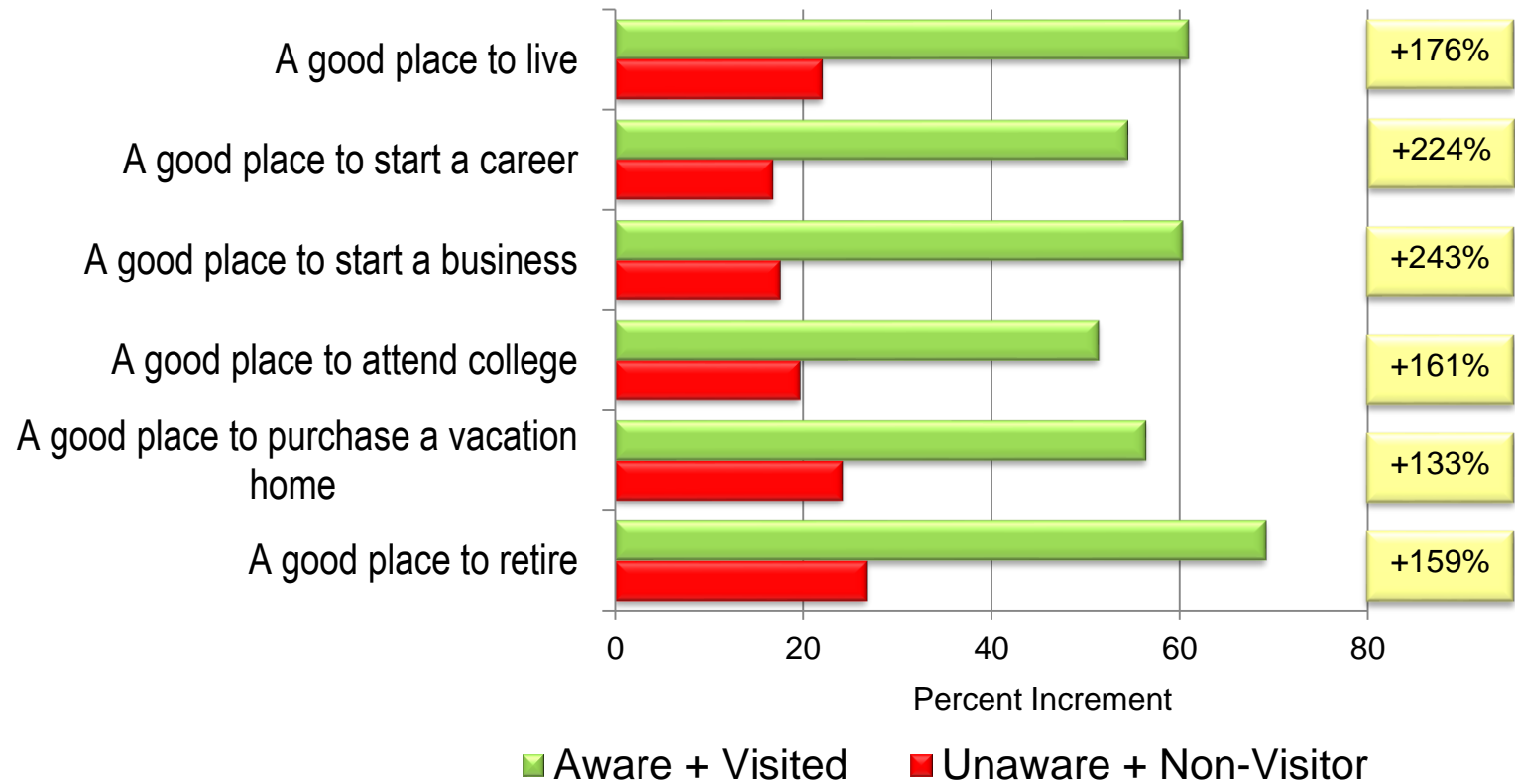
Impact of *Tourism Ad Awareness* on Mississippi Gulf Coast's Economic Development Image



Impact of *Visitation* on Mississippi Gulf Coast's Economic Development Image

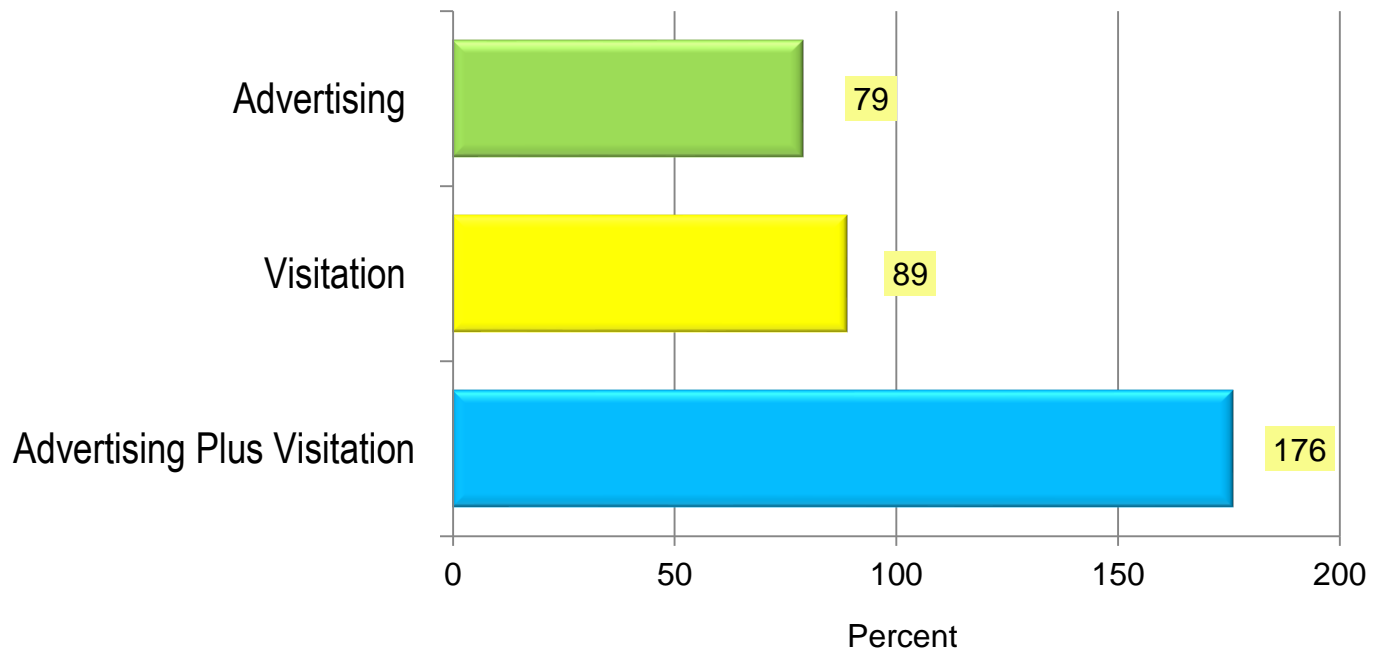


Impact of Ad Awareness *plus* Visitation on Mississippi Gulf Coast's Economic Development Image



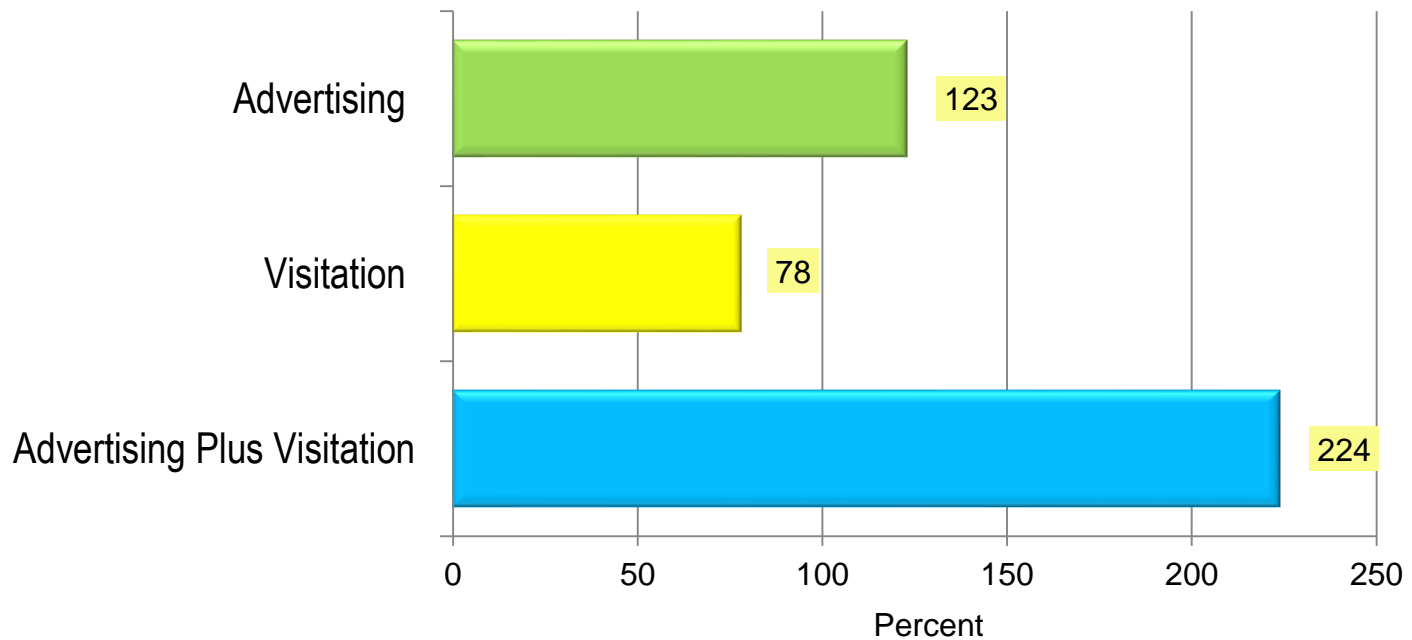
A Good Place to Live

% Image Lift for Mississippi Gulf Coast



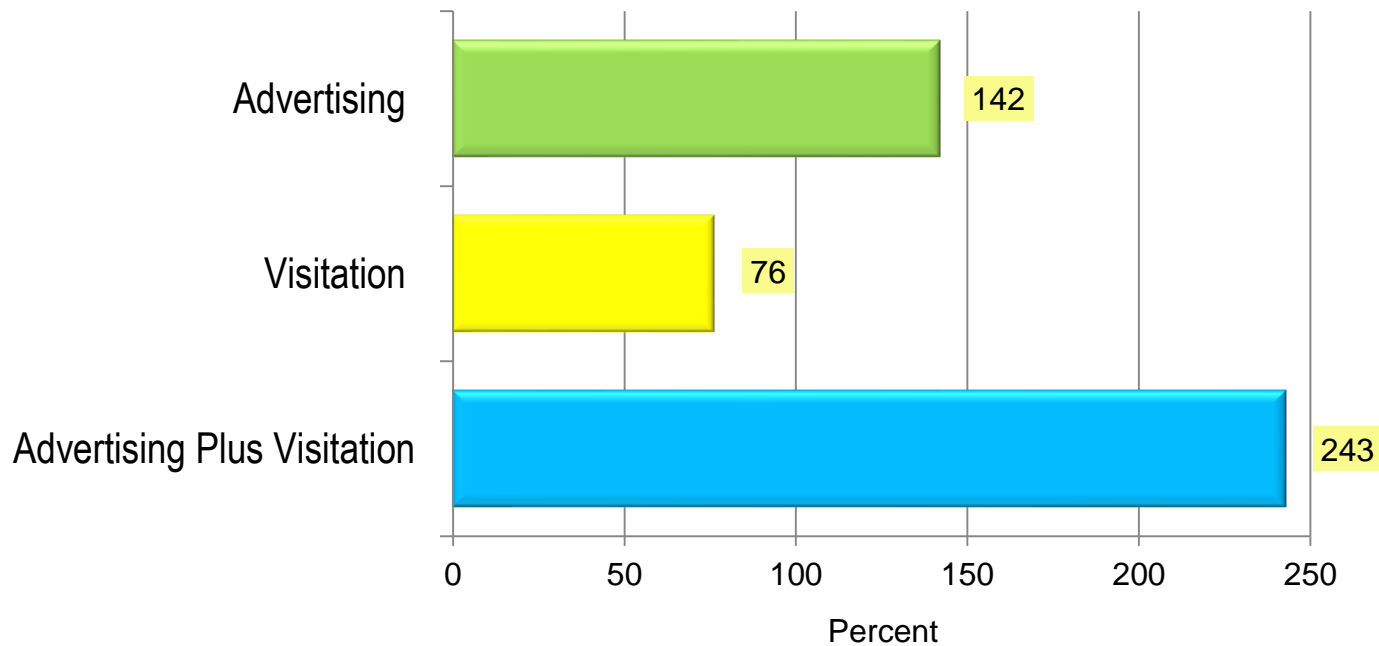
A Good Place To Start A Career

% Image Lift for Mississippi Gulf Coast



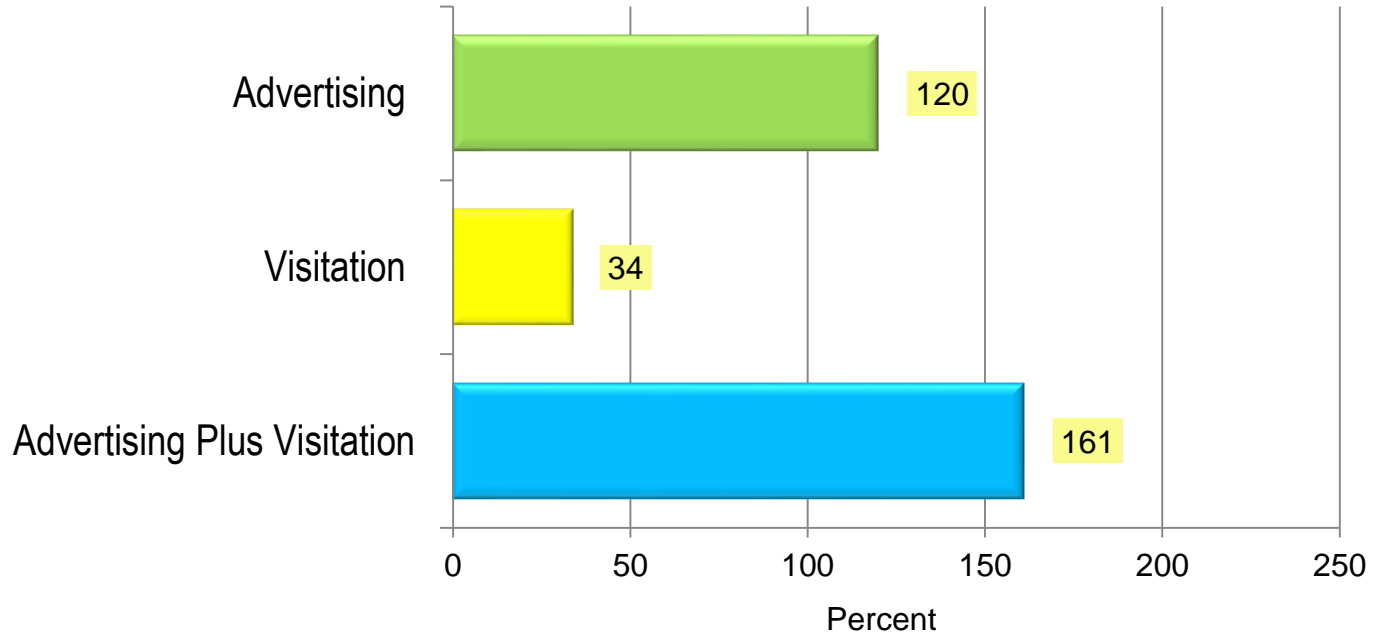
A Good Place to Start a Business

% Image Lift for Mississippi Gulf Coast



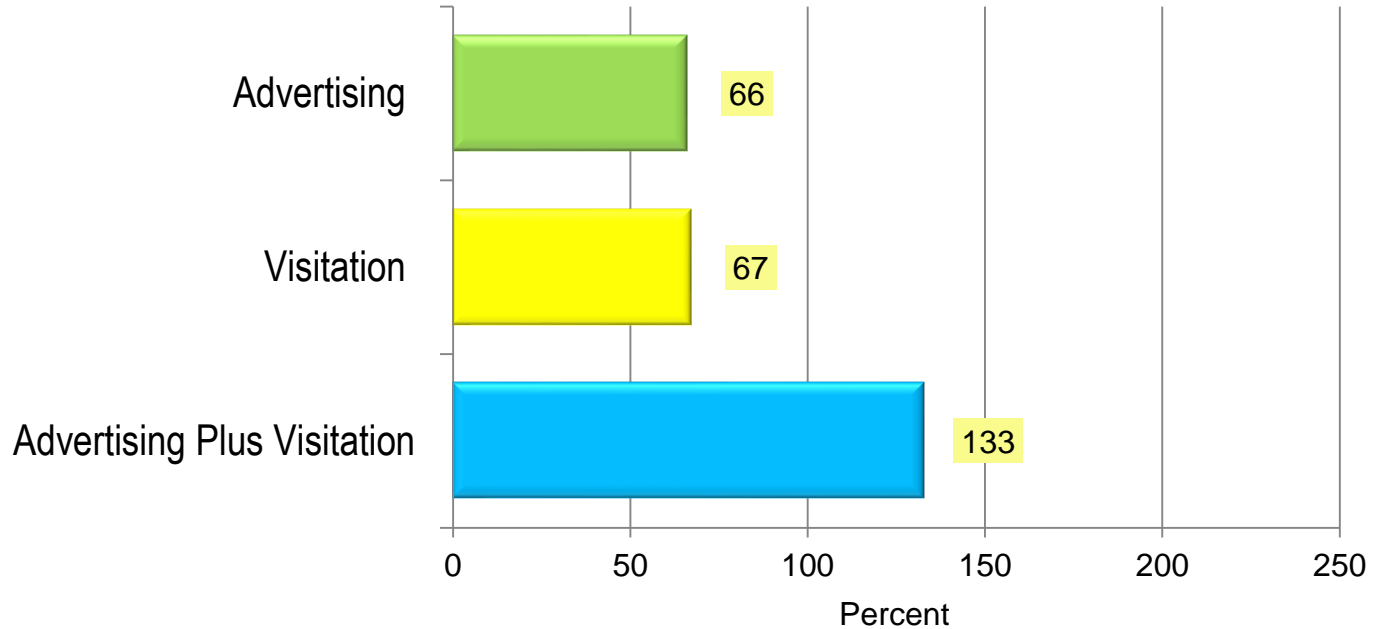
A Good Place to Attend College

% Image Lift for Mississippi Gulf Coast



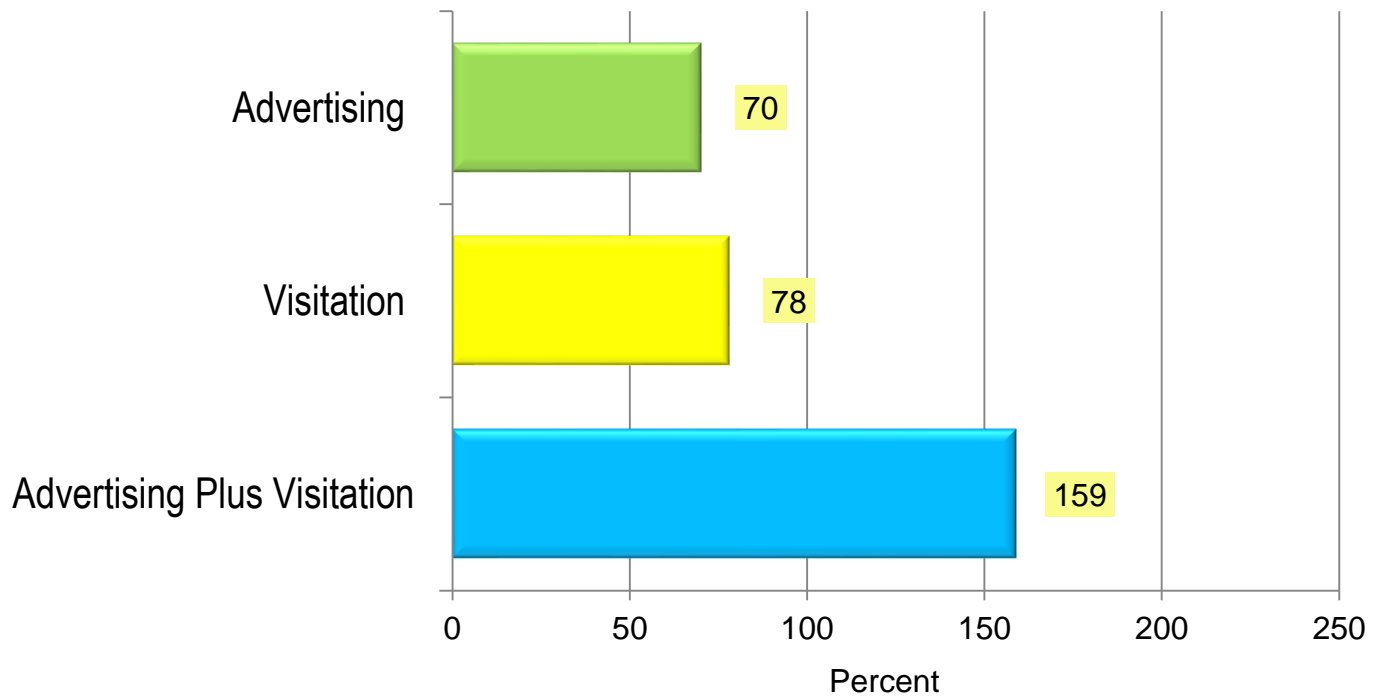
A Good Place to Purchase a Vacation Home

% Image Lift for Mississippi Gulf Coast



A Good Place to Retire

% Image Lift for Mississippi Gulf Coast





Longwoods
INTERNATIONAL

Appendix: Visit
Mississippi Gulf
Coast's Image
Strengths &
Weaknesses vs.
Individual Competitors

Image of the Competition

- Among the destinations evaluated in this study, no one destination emerges as the leader for every dimension. The following summarizes the strengths and weaknesses of the 5 competitors evaluated in this study:

Gulf Shores/Orange Beach

- Gulf Shores/Orange Beach leads the other destinations in the competitive set for being considered an exciting and interesting place, an adult destination, a good place to relax, great for exploring nature and outdoor adventure sports
- Travelers think Gulf Shores/Orange Beach would be better than the Mississippi Gulf Coast in each of these areas, plus:
 - ✓ Other aspects of excitement – fun, adventure, being a must see destination
 - ✓ Good for families/kids
 - ✓ Being a well known destination
 - ✓ Great for golfers
 - ✓ Having first class hotels/resorts
 - ✓ Great shopping
- The Mississippi Gulf Coast has no significant strengths versus Gulf Shores/Orange Beach.

Image of the Competition – Cont'd

Pensacola/Florida Panhandle

- Pensacola/Florida Panhandle's unique edge in this competitive sets is related to perceptions for being a fun place, offering a sense of welcome
- Pensacola/Florida Panhandle is given the advantage over Mississippi Gulf Coast for:
 - ✓ Being a must see destination, and offering a sense of adventure – aspects of the excitement factor
 - ✓ Suitability for families/kids
 - ✓ Great for golfers
 - ✓ Great for motorcycle touring
 - ✓ Popularity with vacationers
 - ✓ Lots of things to see and do including great shopping
 - ✓ A place to relax
- The Mississippi Gulf Coast is felt to be better than Pensacola/Florida Panhandle for fishing.

Image of the Competition – Cont'd

Daytona Beach

- Daytona Beach's unique perceptual edge in this competitive set lies in being thought of as a place everyone must visit at least once in their lifetime, offering a sense of adventure and a unique experience, with plenty of things that kids would enjoy, interesting events/festivals, suitability for motorcycle touring, great spectator sports venues, great climate, and overall popularity as a destination.
- Compared to Mississippi Gulf Coast, Daytona Beach is also given the advantage for:
 - ✓ Suitability for couples and families
 - ✓ First class hotels/resorts.
 - ✓ Lots of things to see and do, including well-known landmarks, great shopping, golf and exciting nightlife/entertainment/shows
 - ✓ A sense of welcome

Image of the Competition – Cont'd

- On the other hand, Mississippi Gulf Coast is considered better than Daytona Beach for :
 - ✓ Being an exciting place
 - ✓ The natural experience, including fishing; outdoor adventure sports; having natural, unspoiled beauty; being great for exploring nature; and wildlife viewing/bird-watching
 - ✓ Historic sites
 - ✓ Warm friendly people
 - ✓ Good place to relax
 - ✓ Affordability and proximity for travelers

Image of the Competition

Tampa/St. Petersburg

- Travelers give Tampa/St. Petersburg the lead over this entire competitive set for having beautiful gardens and parks, having lots to see and do, famous landmarks, great museums/galleries, great entertainment/nightlife/live music, good shopping, golf, and great dining
- Tampa/St. Petersburg is also felt to edge out the Mississippi Gulf Coast for a few additional elements:
 - ✓ Great spectator sports venues.
 - ✓ Suitability for families/kids
 - ✓ Being a well-known destination
 - ✓ Being a real adventure
- Visit Mississippi Gulf Coast tends to get better ratings than Tampa for having warm, friendly people, excitement, affordability, natural/unspoiled beauty, and excellent fishing.

Image of the Competition

Virginia Beach

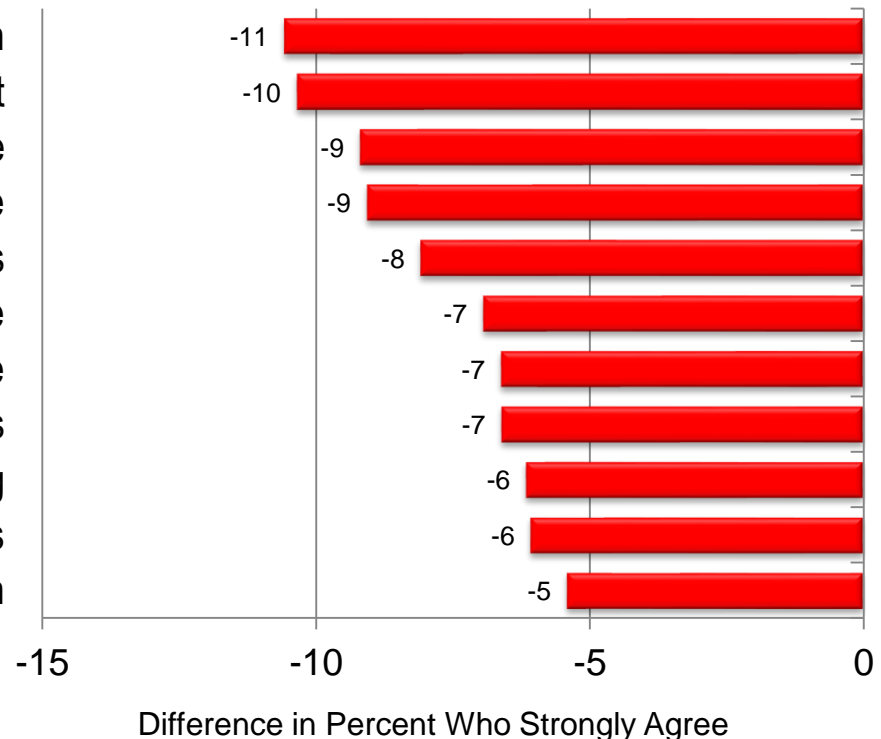
- Virginia Beach surpasses all of the competitive set for perceptions related to offering great sightseeing including interesting historic sites,
- Virginia Beach is rated as being better than Mississippi Gulf Coast for some additional aspects including children especially enjoying the place, being a well-known destination/more popular, well known landmarks, golf, shopping, museums/galleries, being a real adventure, and popular with vacationers. People also believe Virginia Beach has a better contrast among the seasons.
- Mississippi Gulf Coast shows image strength versus Virginia Beach for excitement, unspoiled scenic beauty, affordability, outdoor activities such as exploring nature, viewing wildlife/birds, adventure sports and fishing.

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

**THERE WERE NO SIGNIFICANT
PERCEIVED IMAGE STRENGTHS VS.
GULF SHORES/ORANGE BEACH**

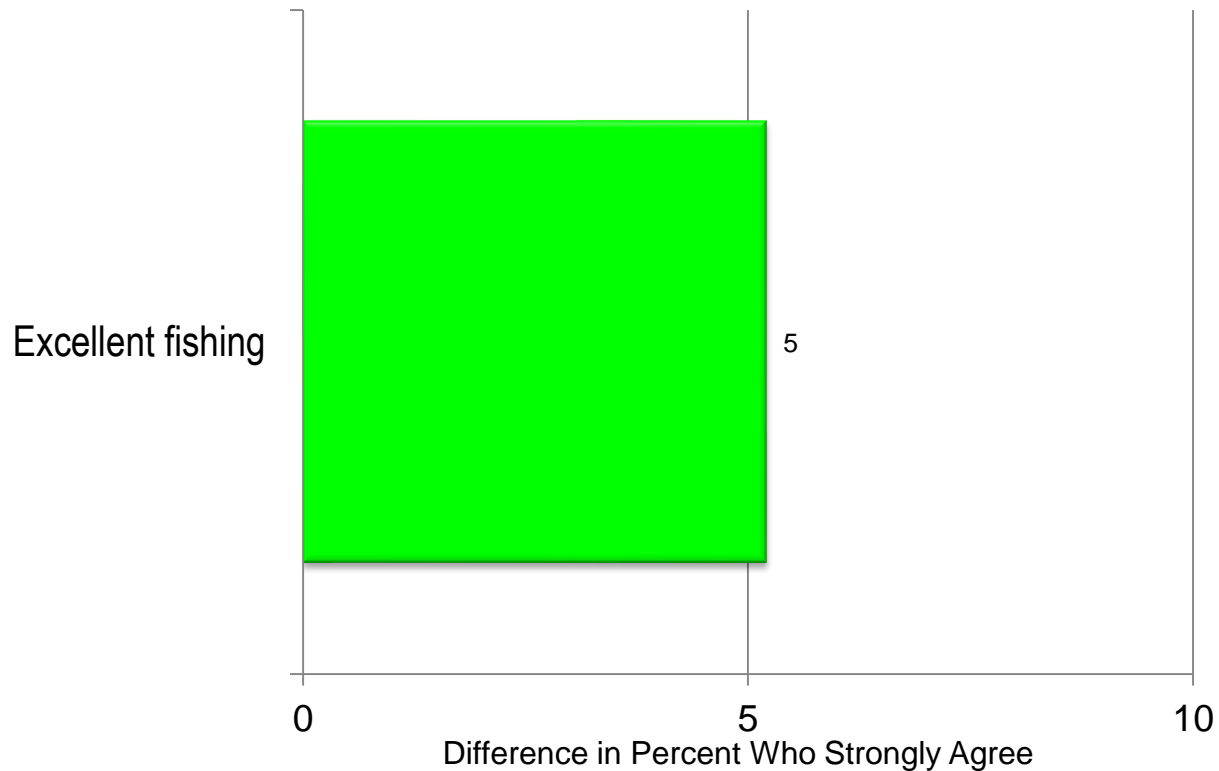
Visit Mississippi Gulf Coast's Image Weaknesses vs. Gulf Shores/Orange Beach

- Well-known destination
- Good place for families to visit
- ▶ Is an interesting place
- Children would especially enjoy this place
- Great for golfers
- Good place to relax/escape from hectic life
- ▶ A place everyone should visit at least once
- First-class hotels/resorts
- Great shopping
- Good for couples
- ▶ A fun place for a vacation



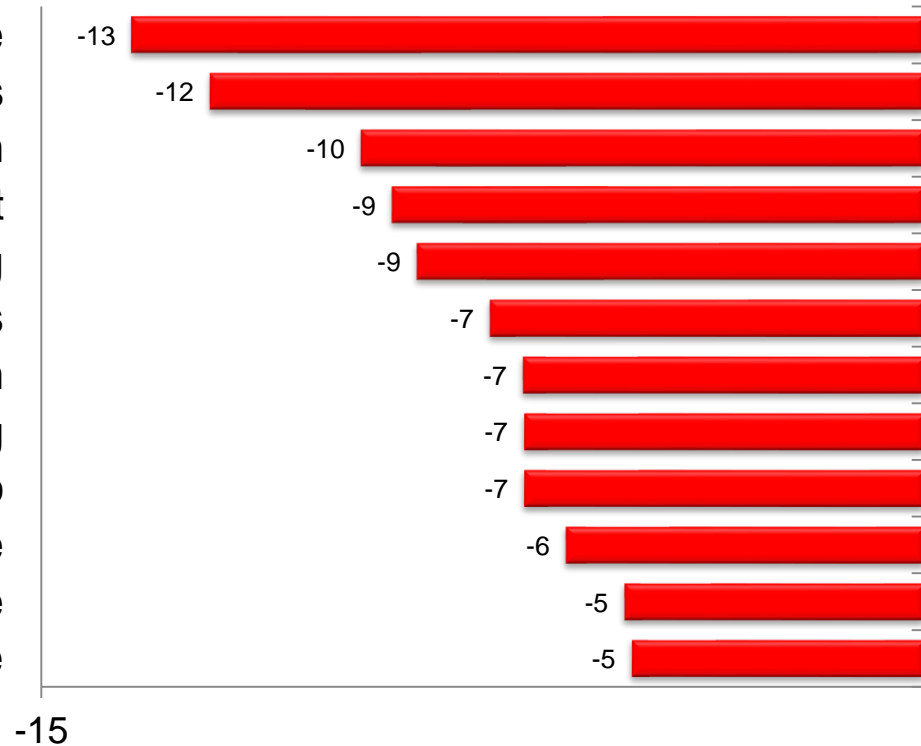
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

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



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

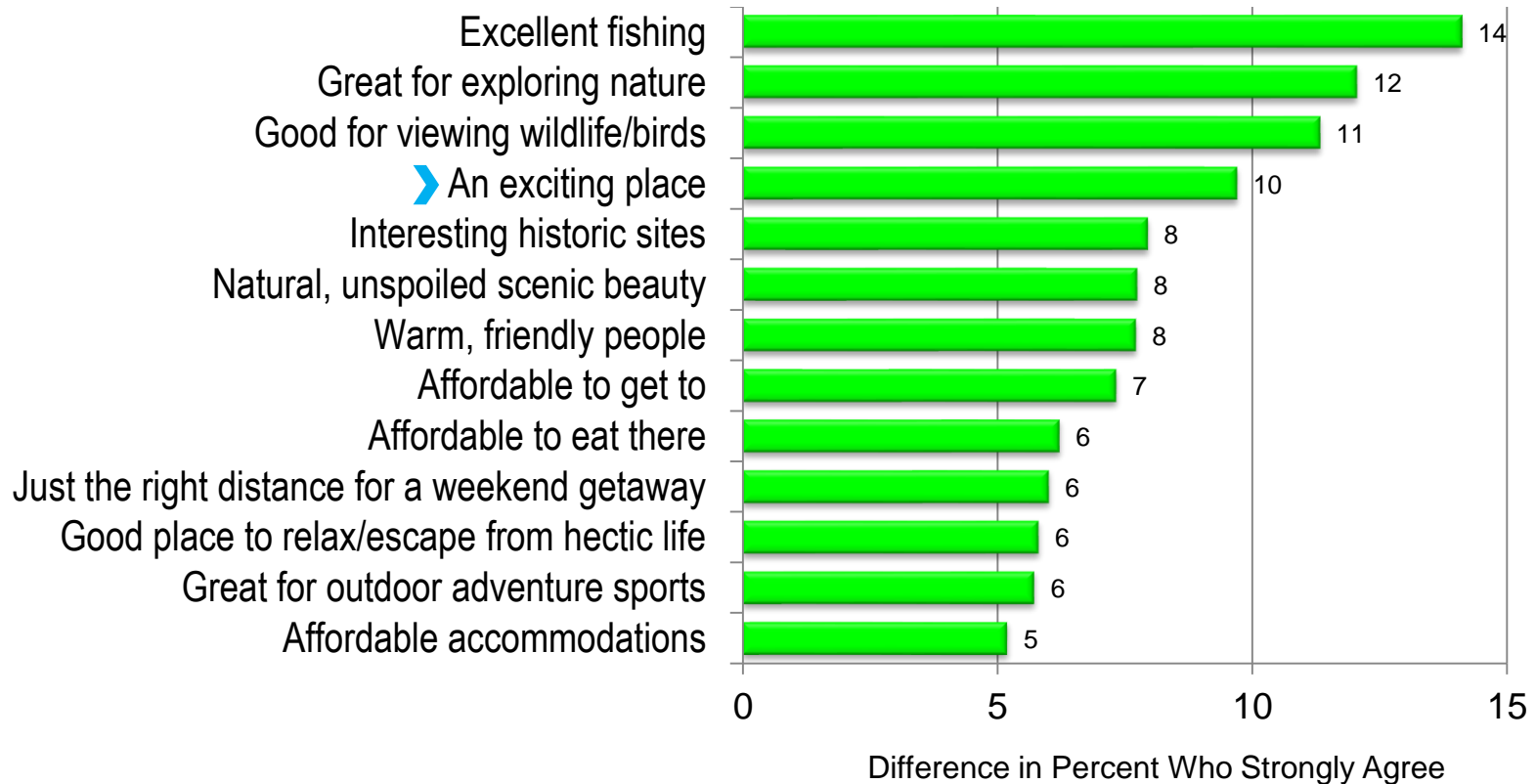
- Children would especially enjoy this place
- Great for golfers
- Well-known destination
- Good place for families to visit
- Great for motorcycle touring
- Popular with vacationers
- ▶ A fun place for a vacation
- Great shopping
- Lots of things to see and do
- ▶ A place I would feel welcome
- A vacation there is a real adventure
- ▶ A place everyone should visit at least once



Difference in Percent Who Strongly Agree

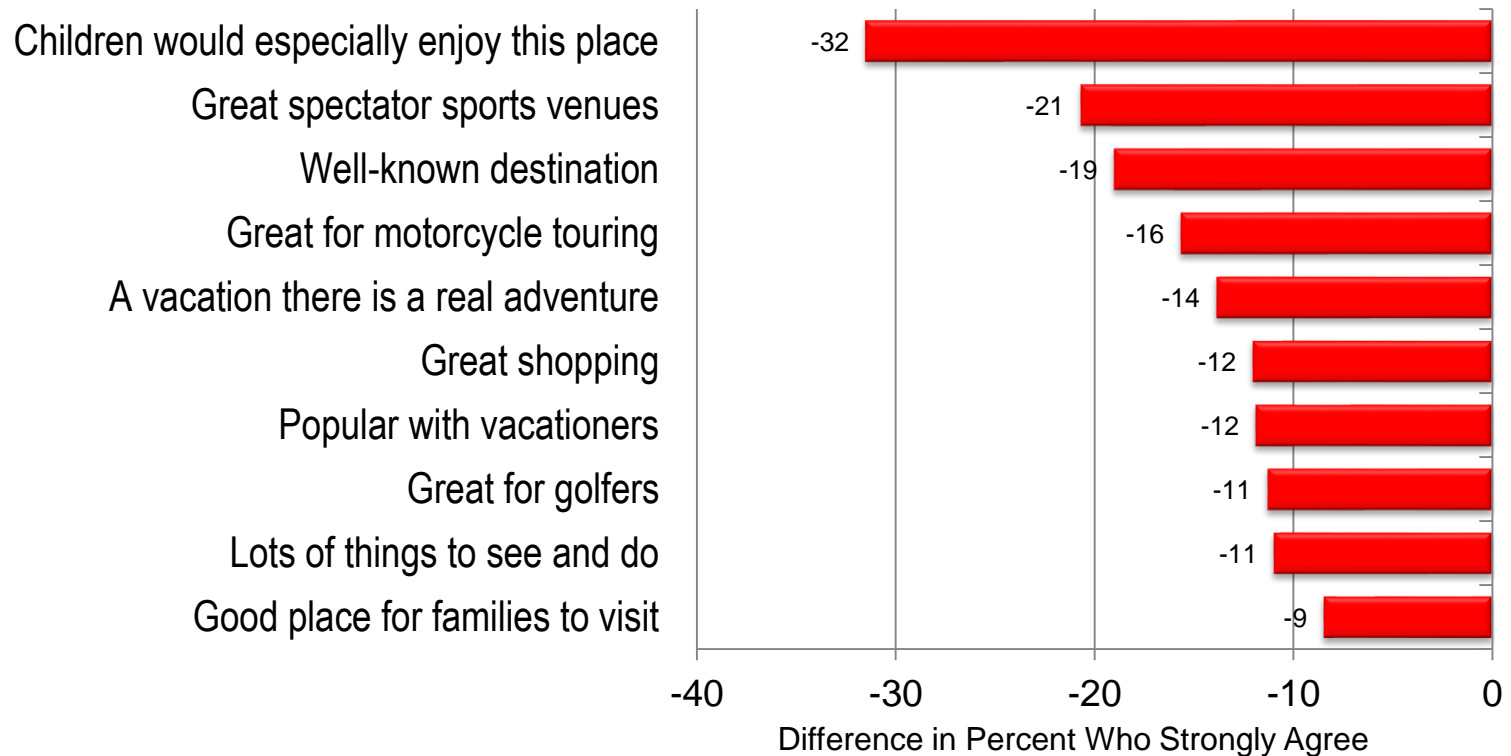
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Mississippi Gulf Coast's Image Strengths vs. Daytona Beach

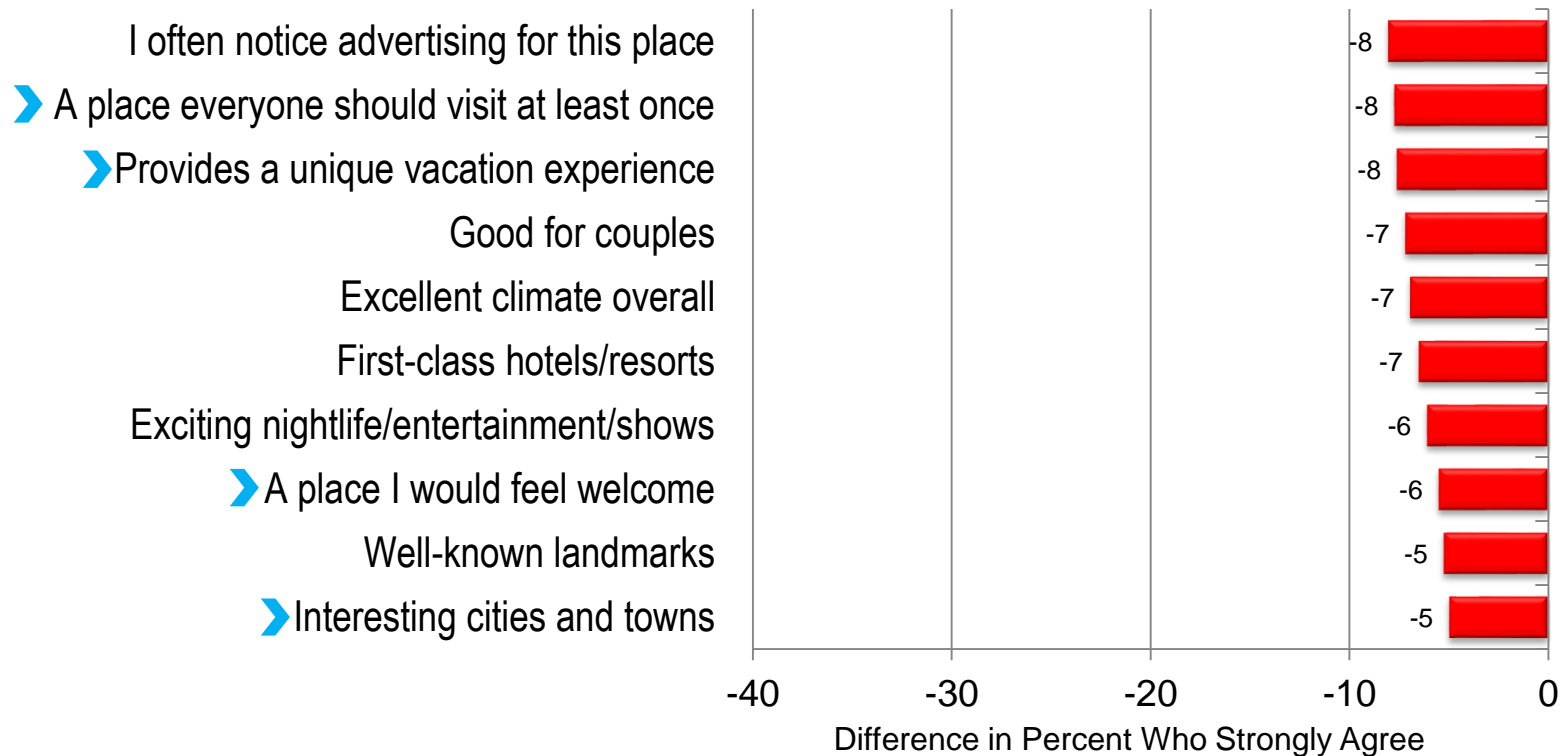


* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Mississippi Gulf Coast's Image Weaknesses vs. Daytona Beach

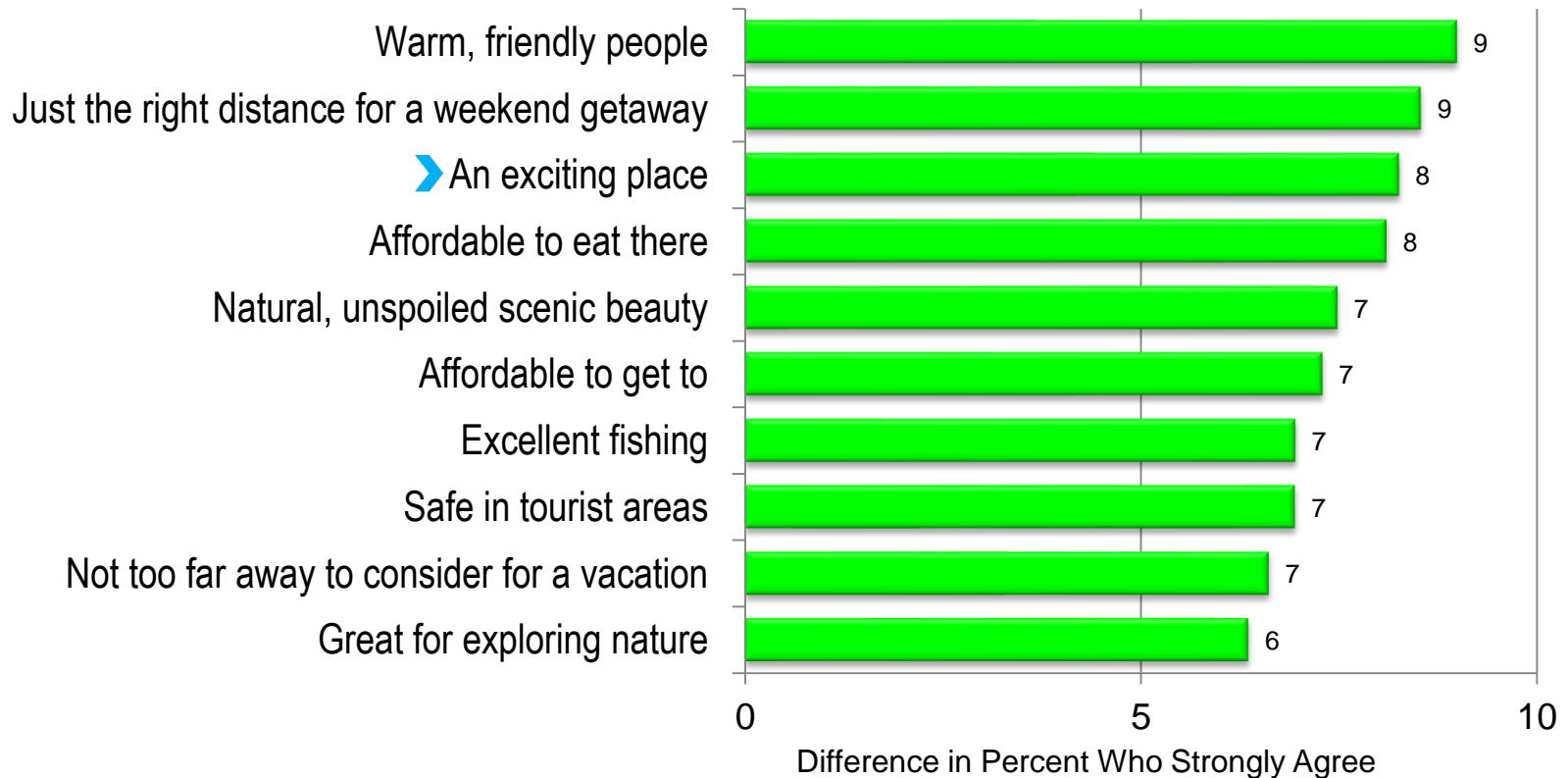


Mississippi Gulf Coast's Image Weaknesses vs. Daytona Beach



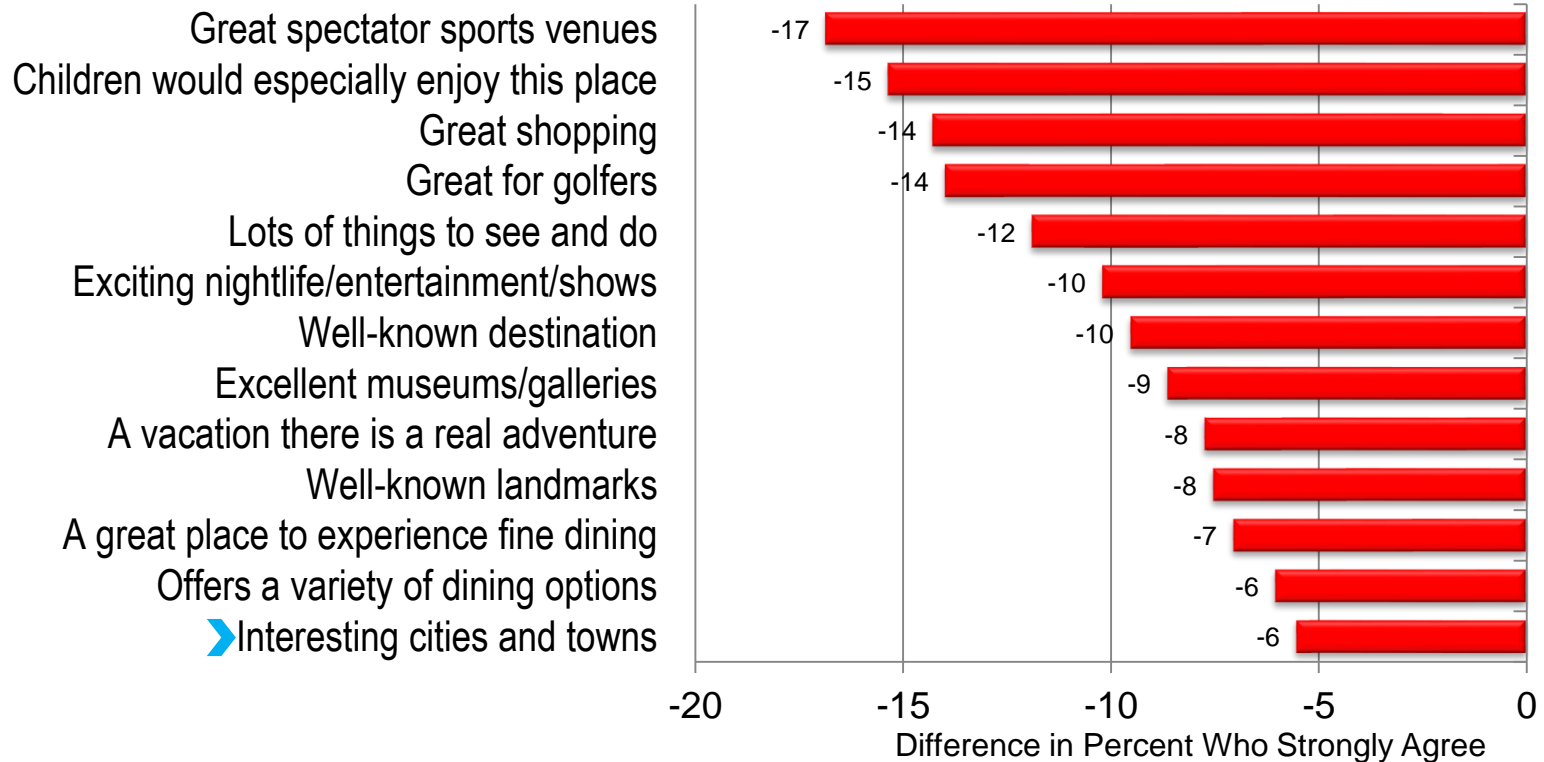
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Mississippi Gulf Coast's Image Strengths vs. Tampa/St. Petersburg



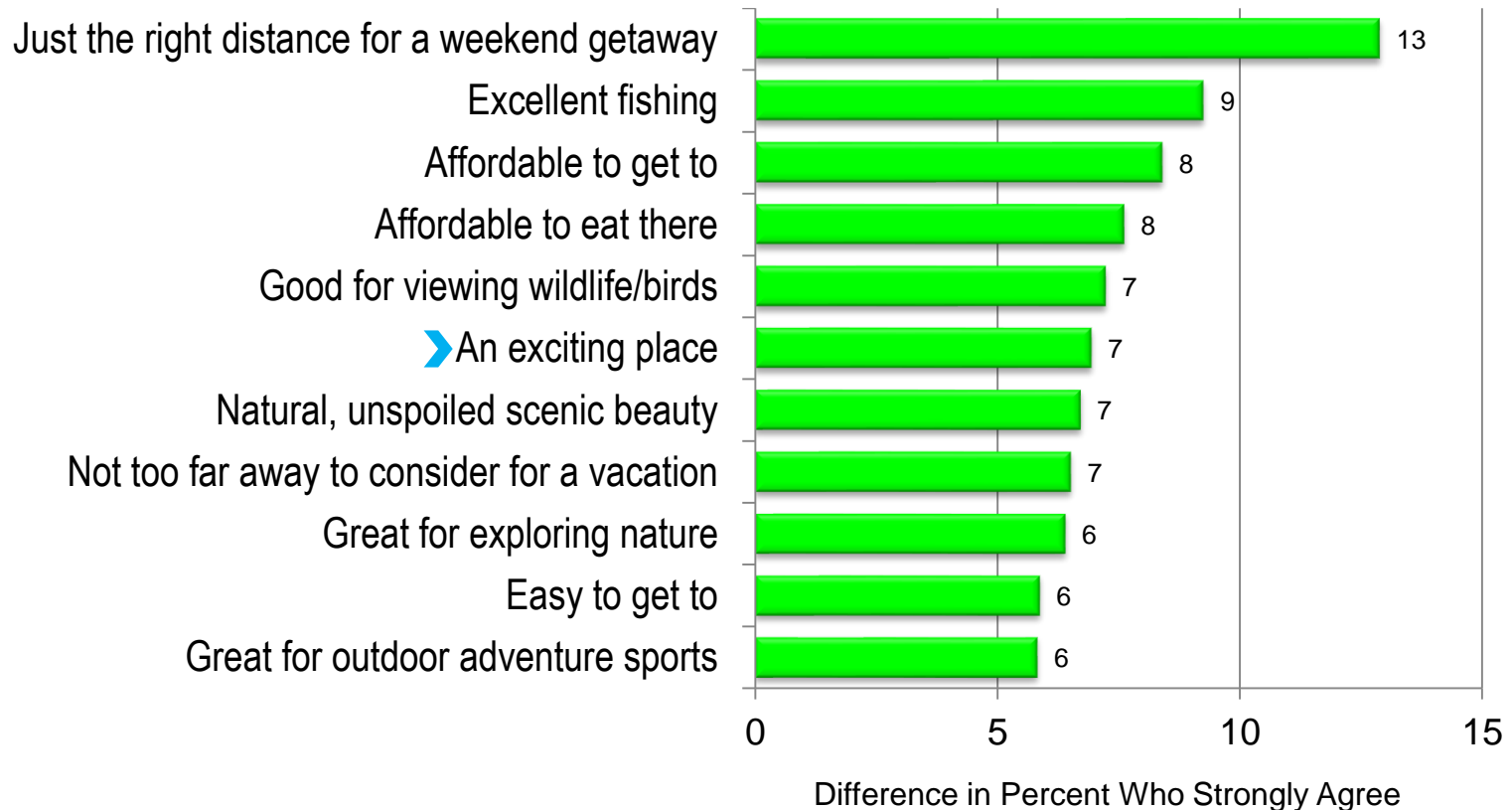
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Mississippi Gulf Coast's Image Weaknesses vs Tampa/St. Petersburg



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Mississippi Gulf Coast's Image Strengths vs. Virginia Beach



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

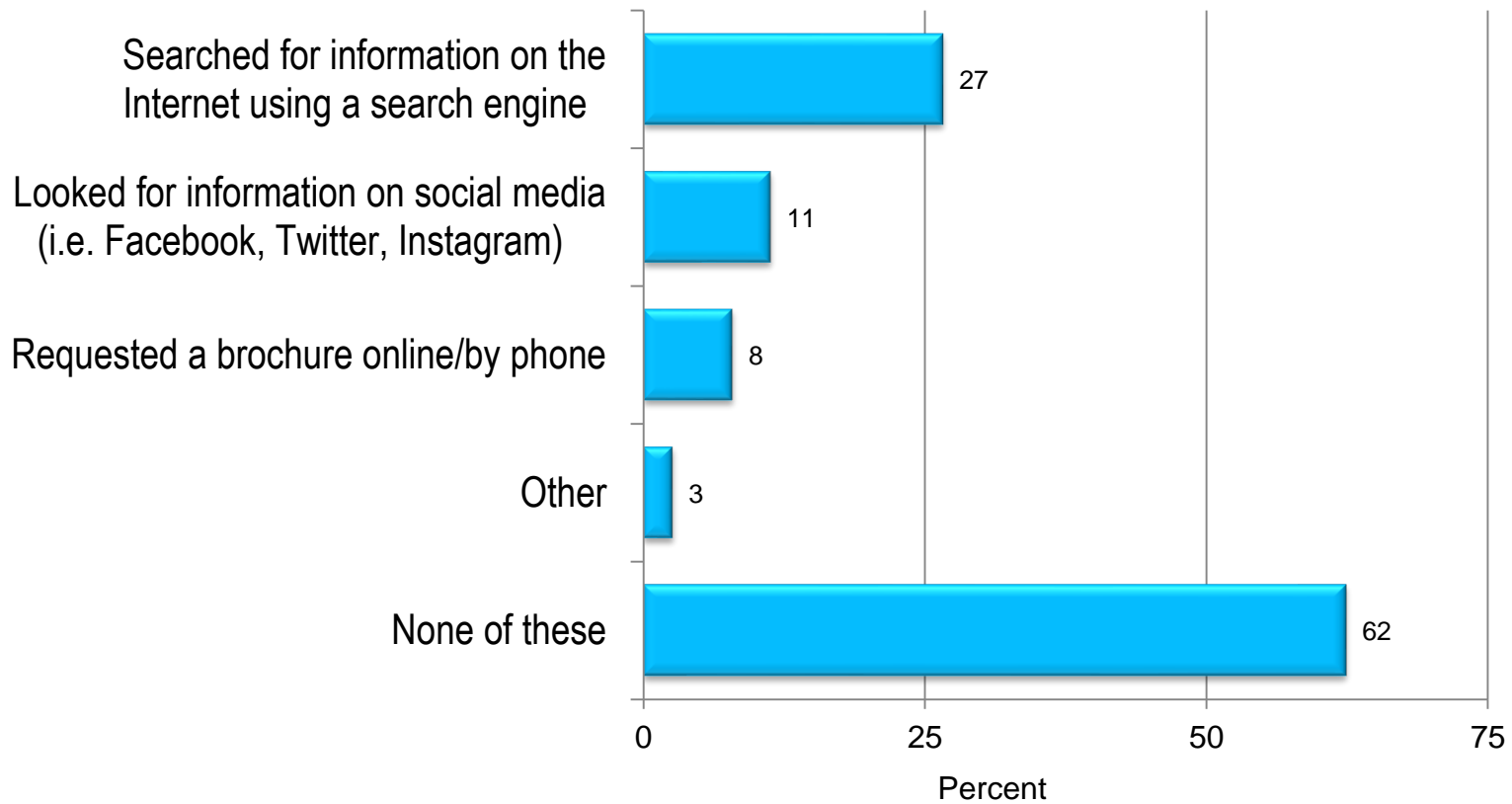
Mississippi Gulf Coast's Image Weaknesses vs. Virginia Beach



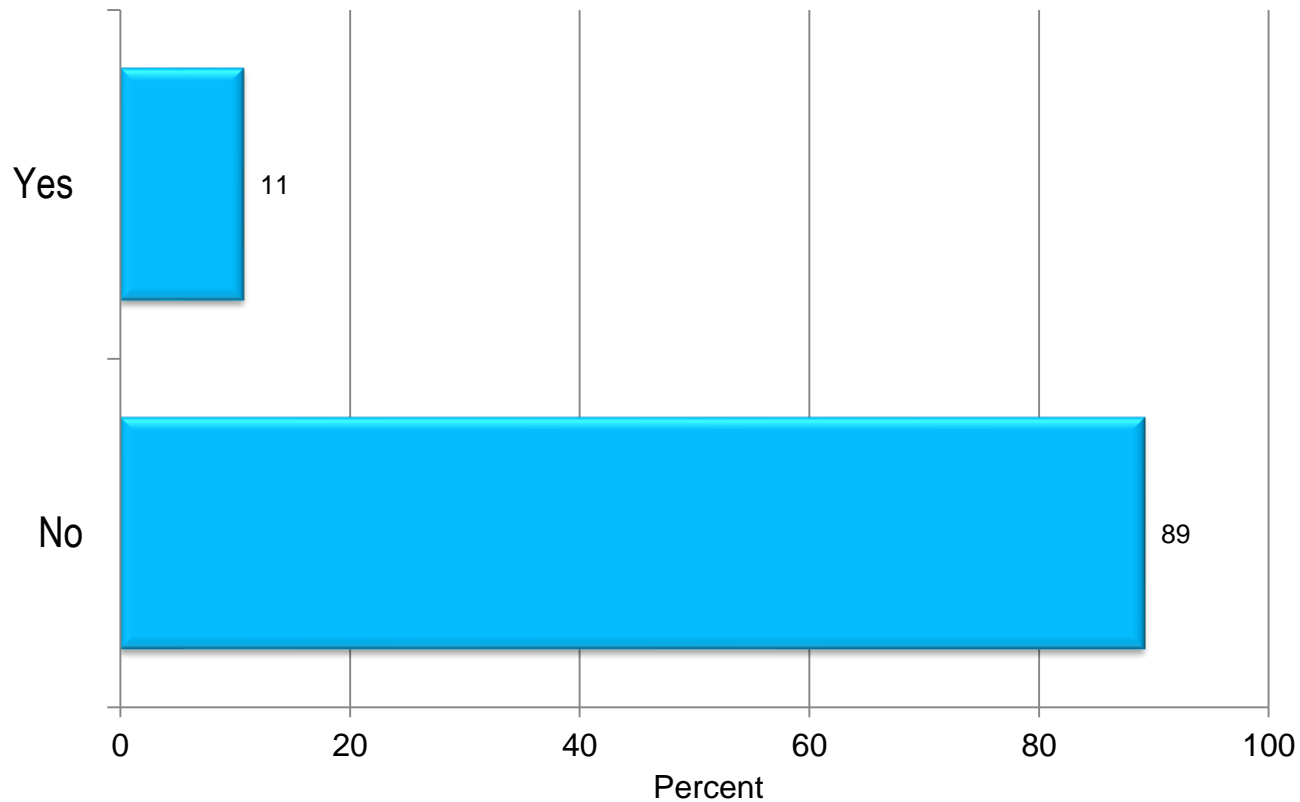


Appendix: Impact of Ads on Trip Planning

After a Mississippi Gulf Coast Ad – Action Taken to Obtain More Information



Do you recall visiting the travel website www.GulfCoast.org?



How many times did you visit www.GulfCoast.org?

