



Mississippi Gulf Coast 2017 Visitor Research



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Introduction

- ✓ Longwoods International began tracking American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- ✓ In 2007, our proprietary Longwoods **Travel USA®** program was migrated from mail to online, with the benefits of rapid turnaround, enhanced flexibility and interactivity, as well as greater respondent involvement.
- ✓ It is currently the largest ongoing study conducted of American travelers, providing our clients with more reliable data and greater ability to home in on key market segments of interest.
- ✓ This report provides an overview for Mississippi Gulf Coast's **domestic** tourism business in 2017.

Research Objectives

- ✓ The visitor research program is designed to provide:
 - ✓ Estimates of domestic overnight and day visitor volumes to Mississippi Gulf Coast.
 - ✓ A profile of Mississippi Gulf Coast's performance within its overnight travel market.
 - ✓ Domestic visitor expenditures in Mississippi Gulf Coast.
 - ✓ Profiles of Mississippi Gulf Coast's day travel market.
 - ✓ Relevant trends in each of these areas.

Methodology

- Each quarter, a random, projectable sample of adult members (18 years of age and over) of a major U.S. consumer panel is invited to participate in the Travel **USA**® survey:
 - Selected to be representative of the U.S. adult population
- For the 2017 travel year, this yielded :
 - 329,470 trips for analysis nationally:
 - 232,317 overnight trips
 - 97,153 day trips
- For Mississippi Gulf Coast, the following sample was achieved in 2017:
 - 890 trips:
 - 564 overnight trips
 - 326 day trips
- For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.



Key Findings



Key Findings

- In 2017, Mississippi Gulf Coast had 13.5 million person trips, increasing 6.3% from 2015. The Mississippi Gulf Coast grew about twice the national growth thus increasing its market share. Of the trips to the Mississippi Gulf Coast, 57% were day trips and 43% were overnight trips.
- The overnight trips generated \$1.17 billion in spending, increasing 9.2% from 2015.
- When asked about the main purpose of their overnight trip, 28% responded that they were visiting friends and relatives, while 62% said they were on marketable trips. Marketable trips are defined as those trip types that can be influenced by marketing efforts. The most prevalent marketable trip type was casino at 38%.
- The top three states of origin for visitors on overnight trips to Mississippi Gulf Coast were Louisiana, Mississippi, and Florida. Among DMAs, the top three overnight visitor sources were New Orleans, Mobile, and Jackson.

Key Findings (Cont'd)

- Over three-quarters (79%) of visitors on an overnight trip to Mississippi Gulf Coast were very satisfied with the overall trip experience. The next highest-ranking categories for satisfaction were friendliness of the local people (75%) and quality of the food (74%).
- Among those on overnight trips to Mississippi Gulf Coast, 86% have visited Mississippi Gulf Coast at least once before and 71% have visited in the past year.
- Greater than the national average, over half (56%) of the overnight trips were planned 2 months or less before the trip. Greater than the national average, 22% did not plan anything in advance.
- Hotel or resorts, online travel agencies, and advice from friends/family were the most common planning sources for a Mississippi Gulf Coast overnight trip. Hotels or resorts were the most common booking source.

Key Findings (Cont'd)

- The average number of nights spent in Mississippi Gulf Coast on an overnight trip was 2.5 nights, down from 3.3 nights in 2016. The average travel party size was 2.7 persons.
- Over two-thirds (68%) of Mississippi Gulf Coast overnight visitors made the trip with a partner or spouse. Thirty percent reported that they traveled with children.
- Over three-quarters (79%) of overnight Mississippi Gulf Coast travelers arrived by personal car or truck.
- The top five activities and experiences during an overnight trip to Mississippi Gulf Coast were casino, shopping, going to the beach or waterfront, swimming, and fine dining

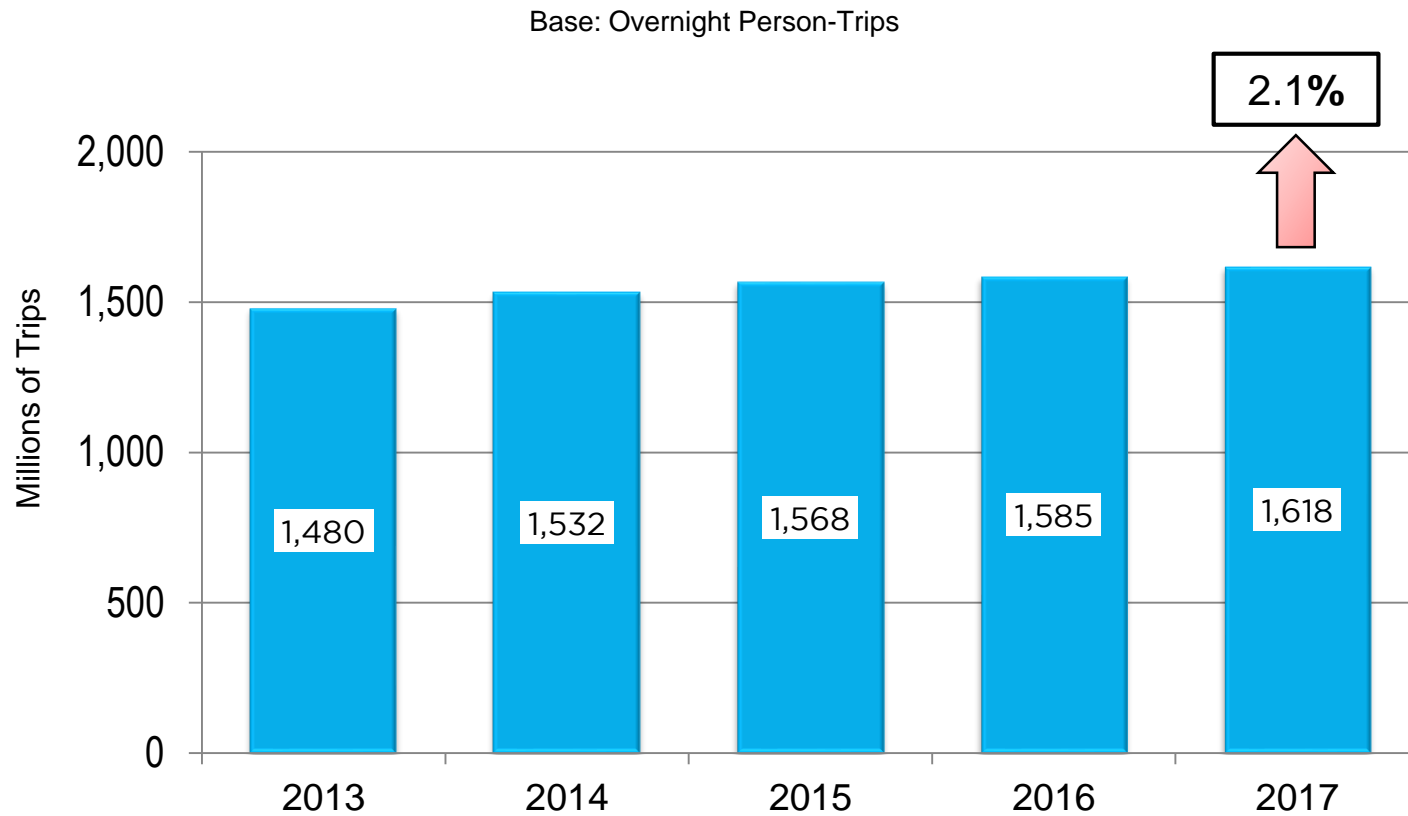


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Size & Structure of the U.S. Travel Market

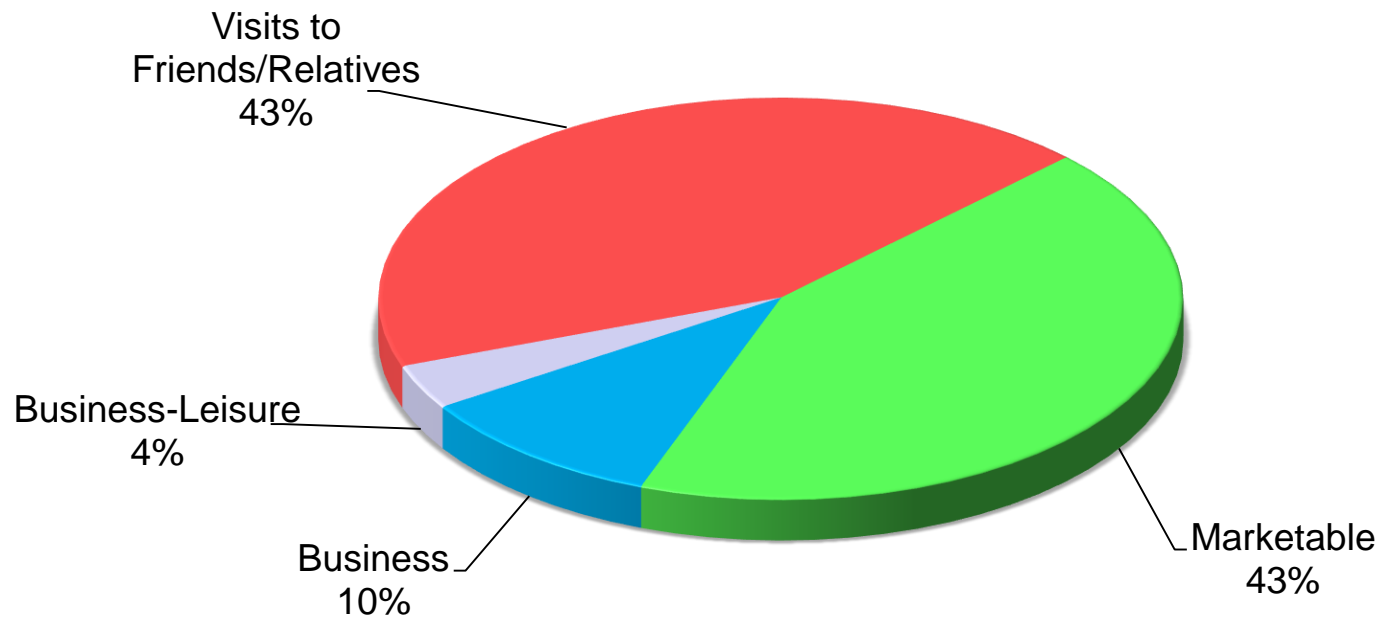


Total Size of the U.S. Travel Market — 2013-2017



Structure of the U.S. Travel Market — 2017 Overnight Trips

Base: Overnight Person-Trips



U.S. Market Trends for Overnight Trips — 2017 vs. 2016





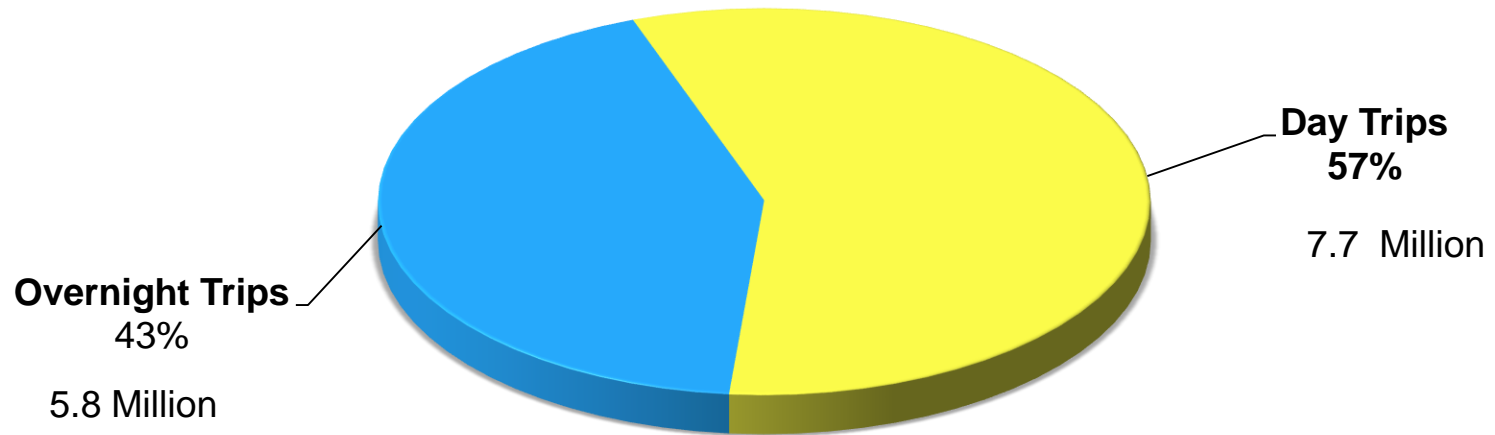
Size & Structure of Mississippi Gulf Coast Domestic Travel Market



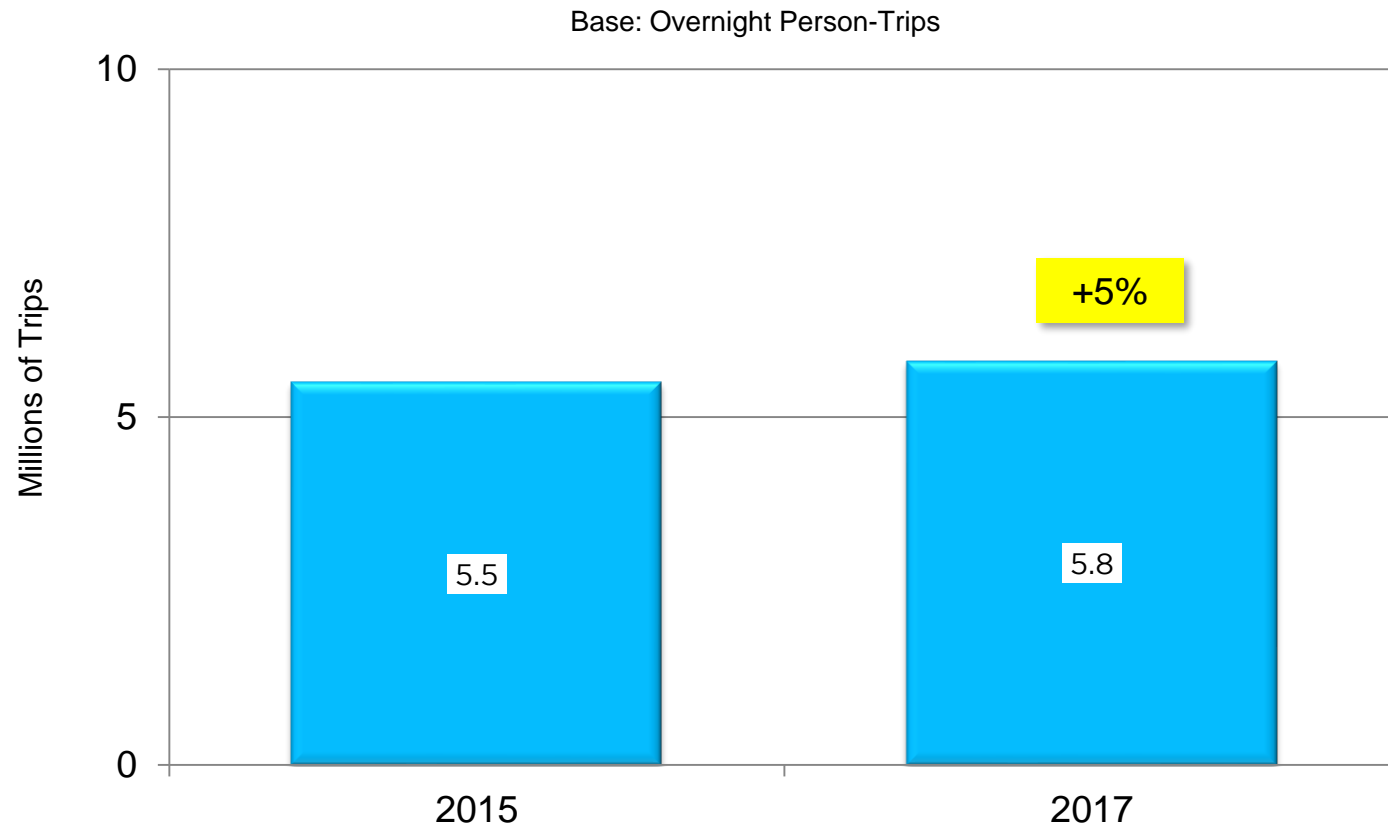
Total Size of Mississippi Gulf Coast 2017 Domestic Travel Market

Total Person-Trips = 13.5 Million

+6.3% vs. 2015

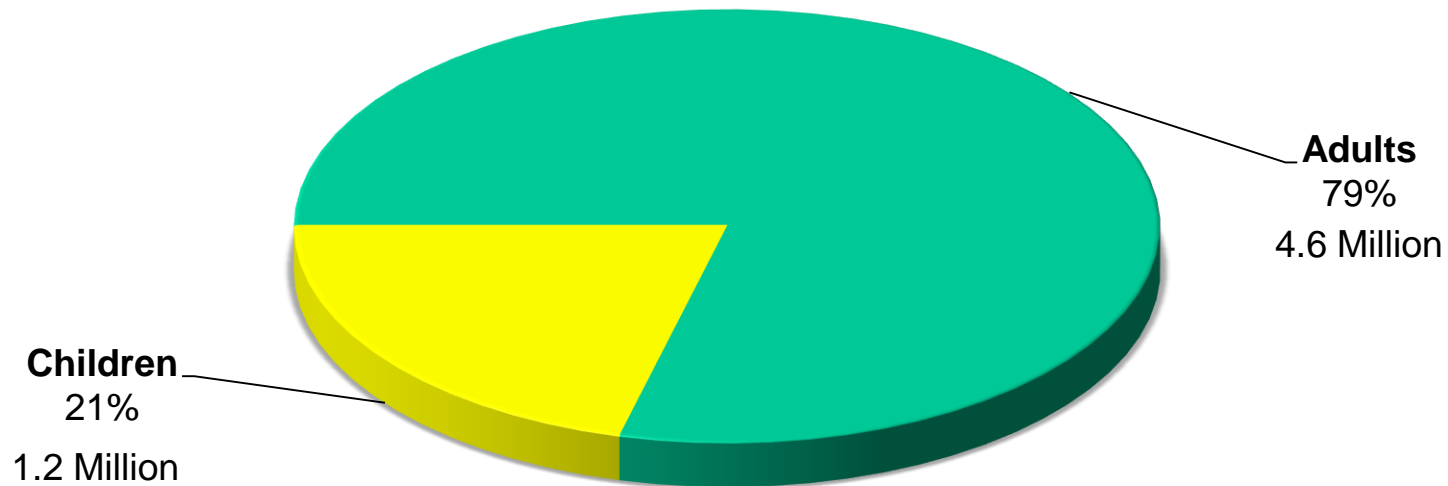


Overnight Trips to Mississippi Gulf Coast



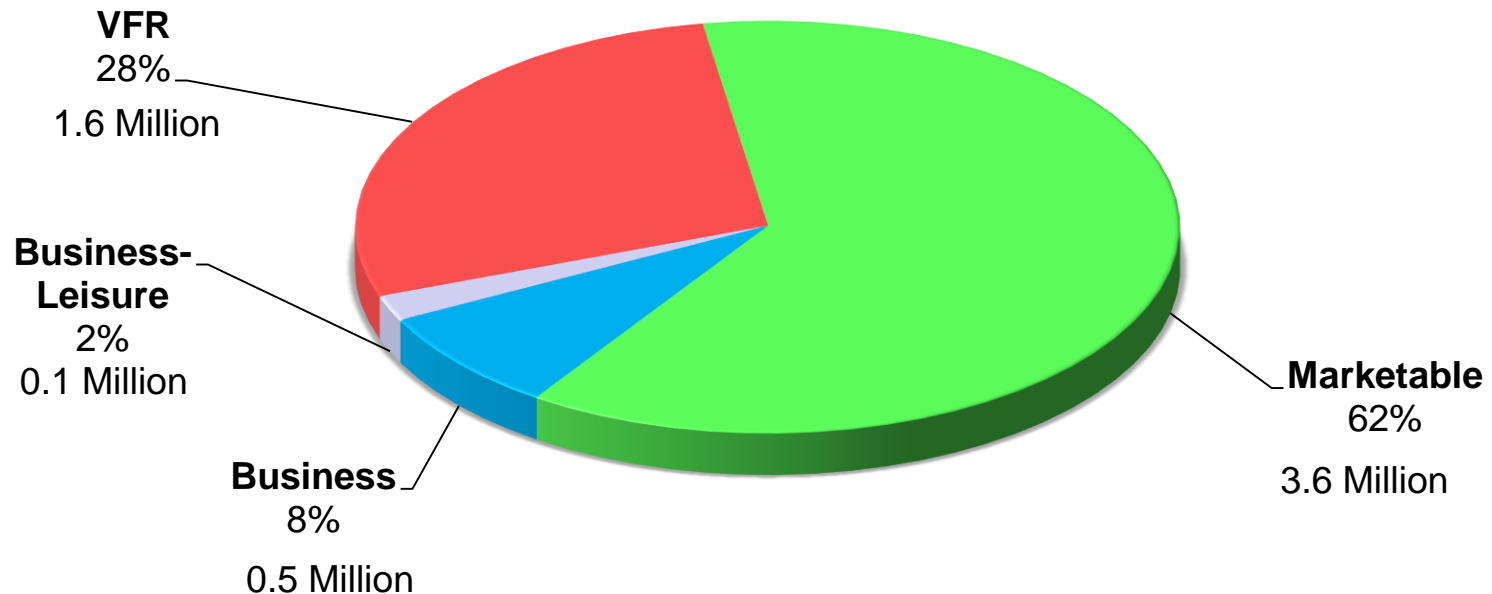
Size of Mississippi Gulf Coast Overnight Travel Market — Adults vs. Children

Total Overnight Person-Trips = 5.8 Million



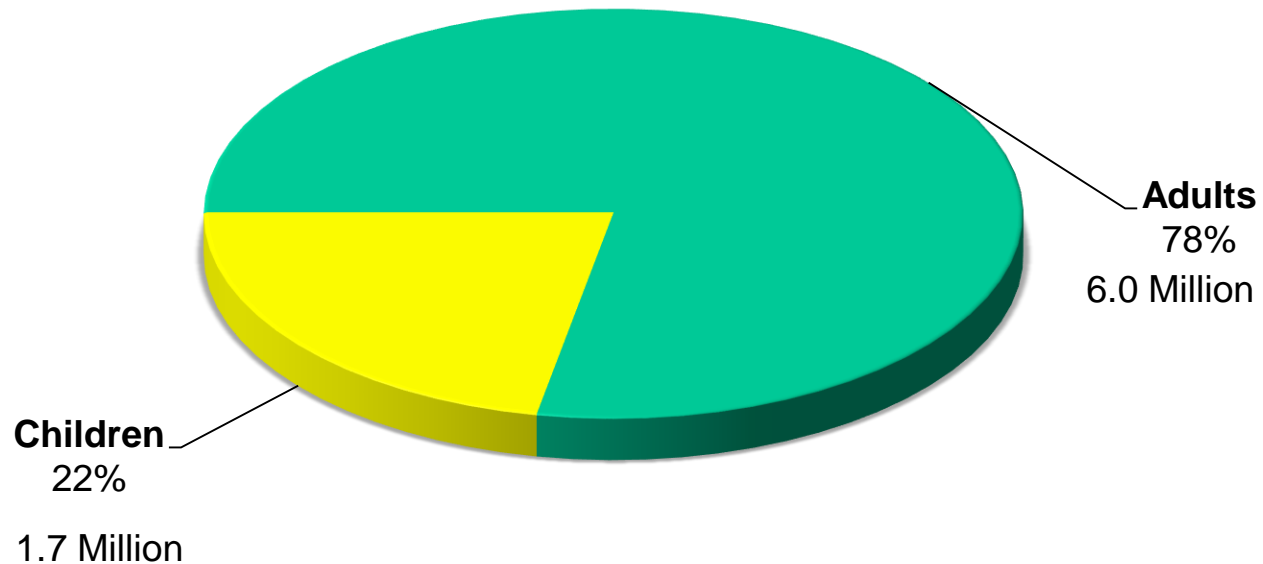
Mississippi Gulf Coast Overnight Travel Market — by Main Trip Purpose

Total Overnight Person-Trips = 5.8 Million



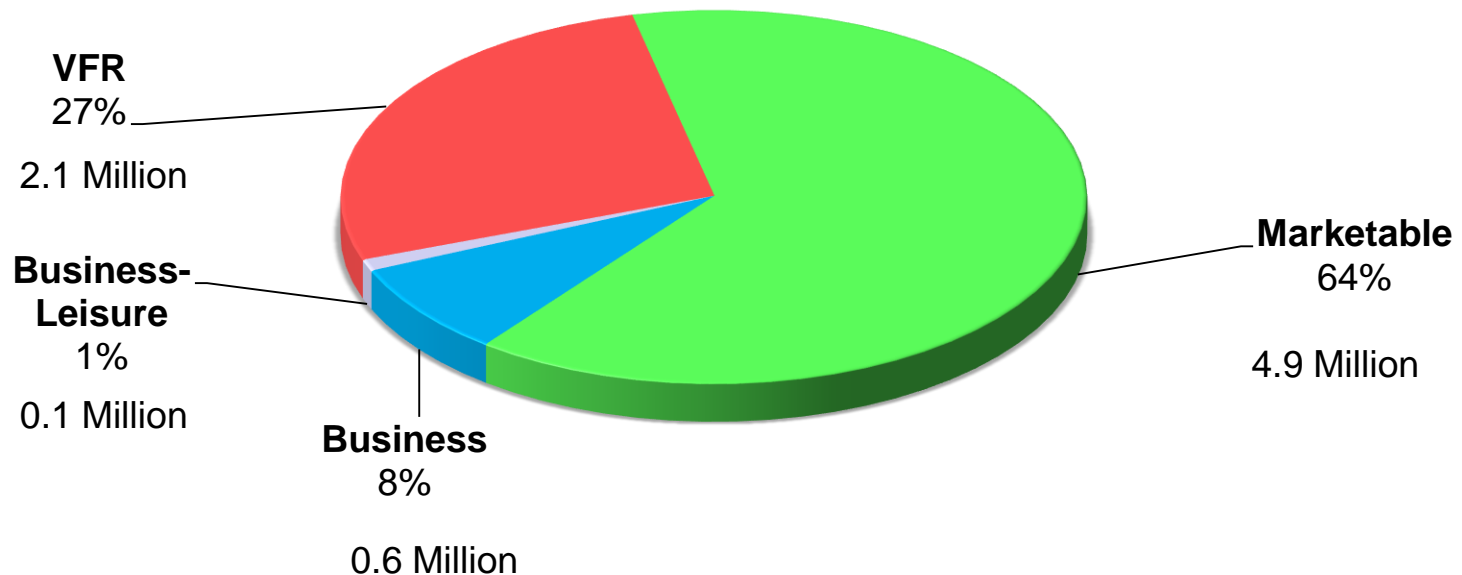
Size of Mississippi Gulf Coast Day Travel Market — Adults vs. Children

Total Day Person-Trips = 7.7 Million



Mississippi Gulf Coast Day Travel Market — by Trip Purpose

Total Day Person-Trips = 7.7 Million





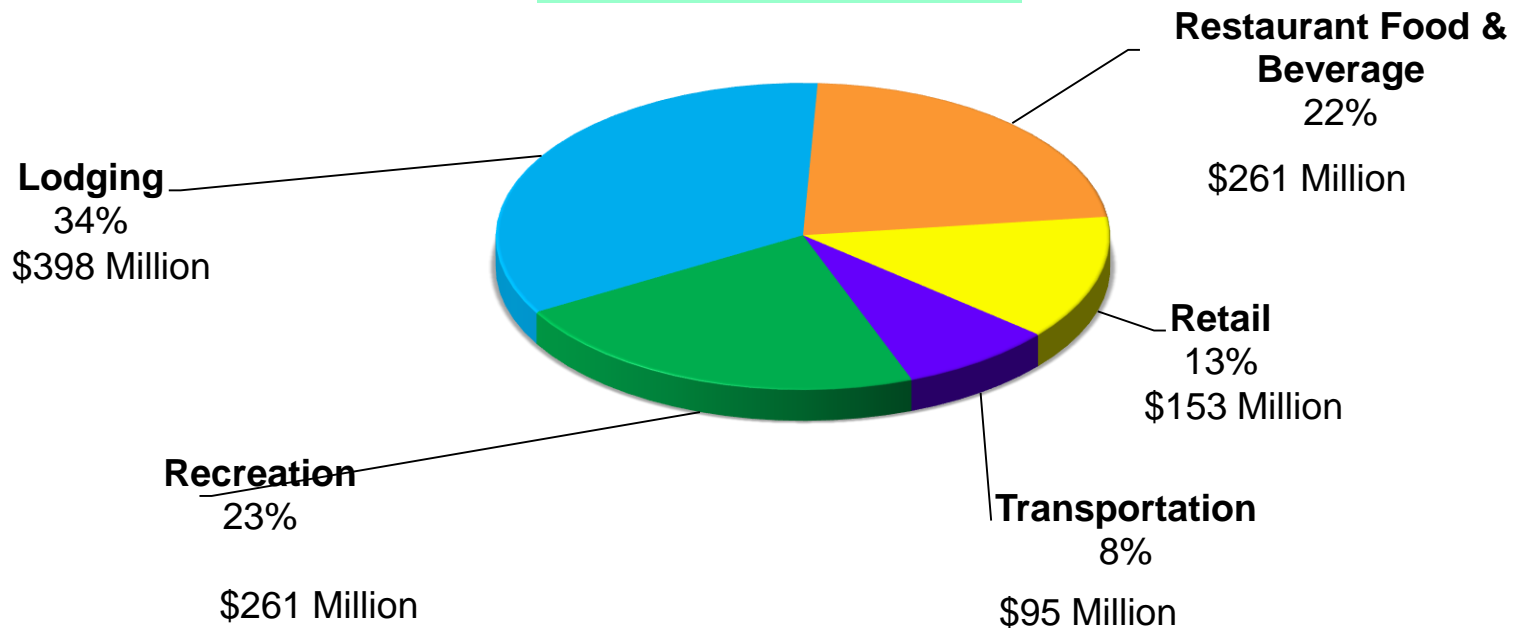
Overnight Trip Expenditures



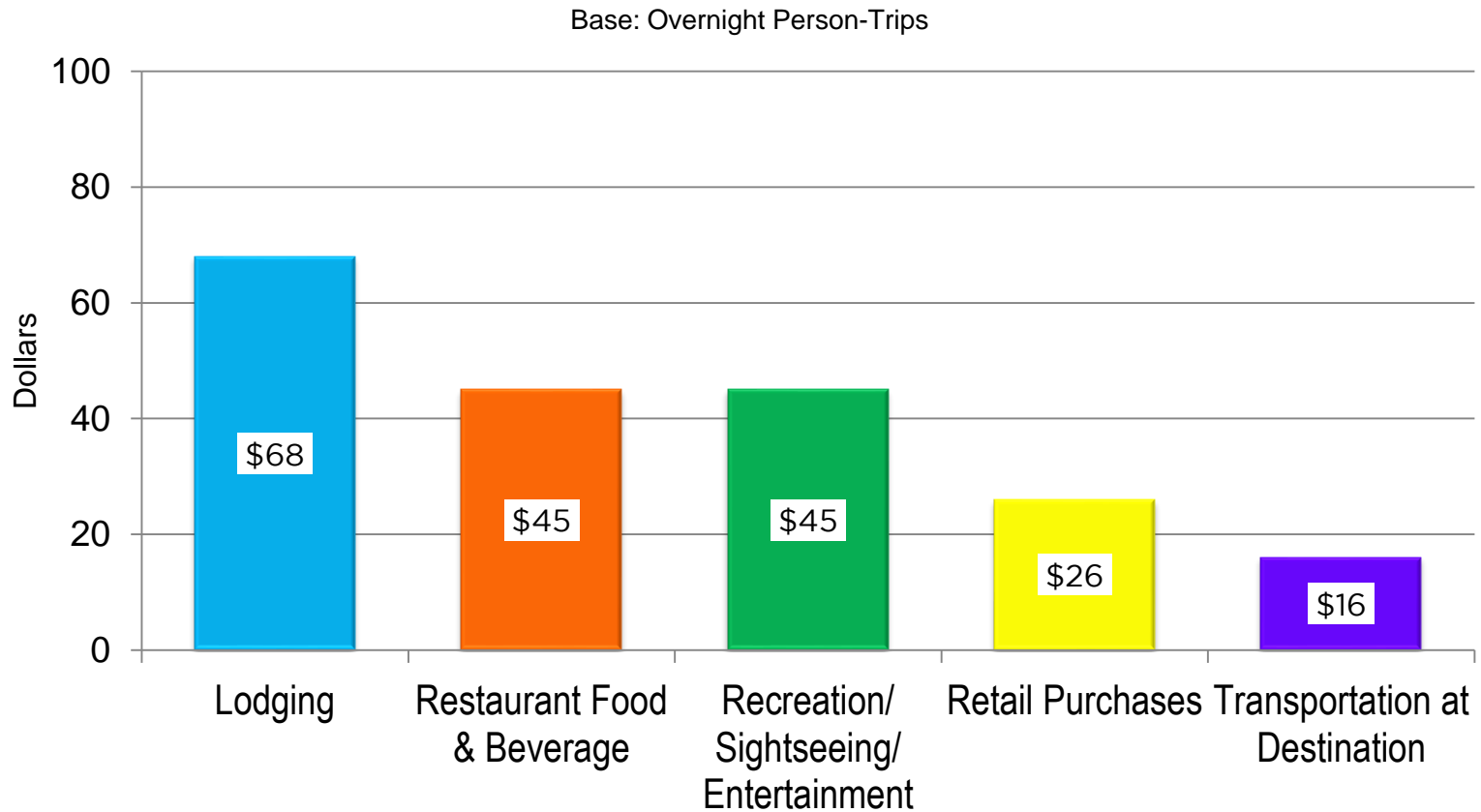
Domestic Overnight Expenditures — by Sector

Total Spending = \$1.167 Billion

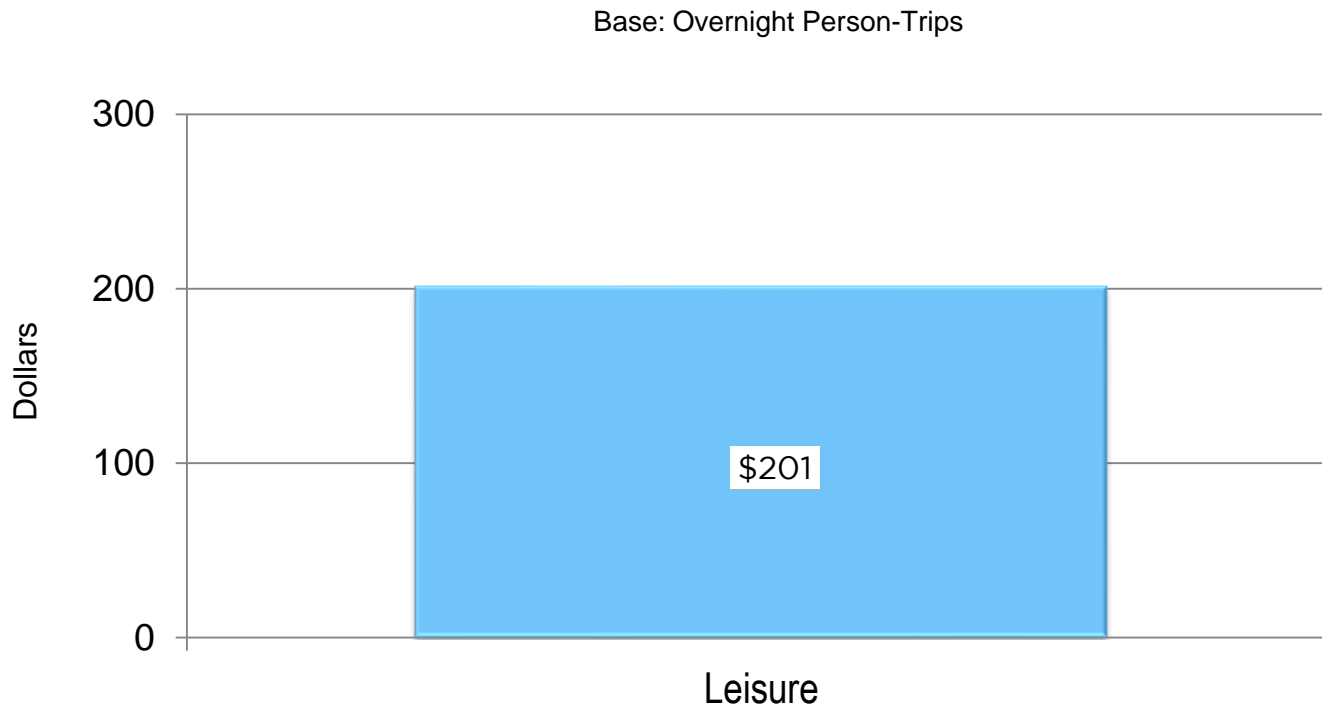
+9.2% vs. 2015



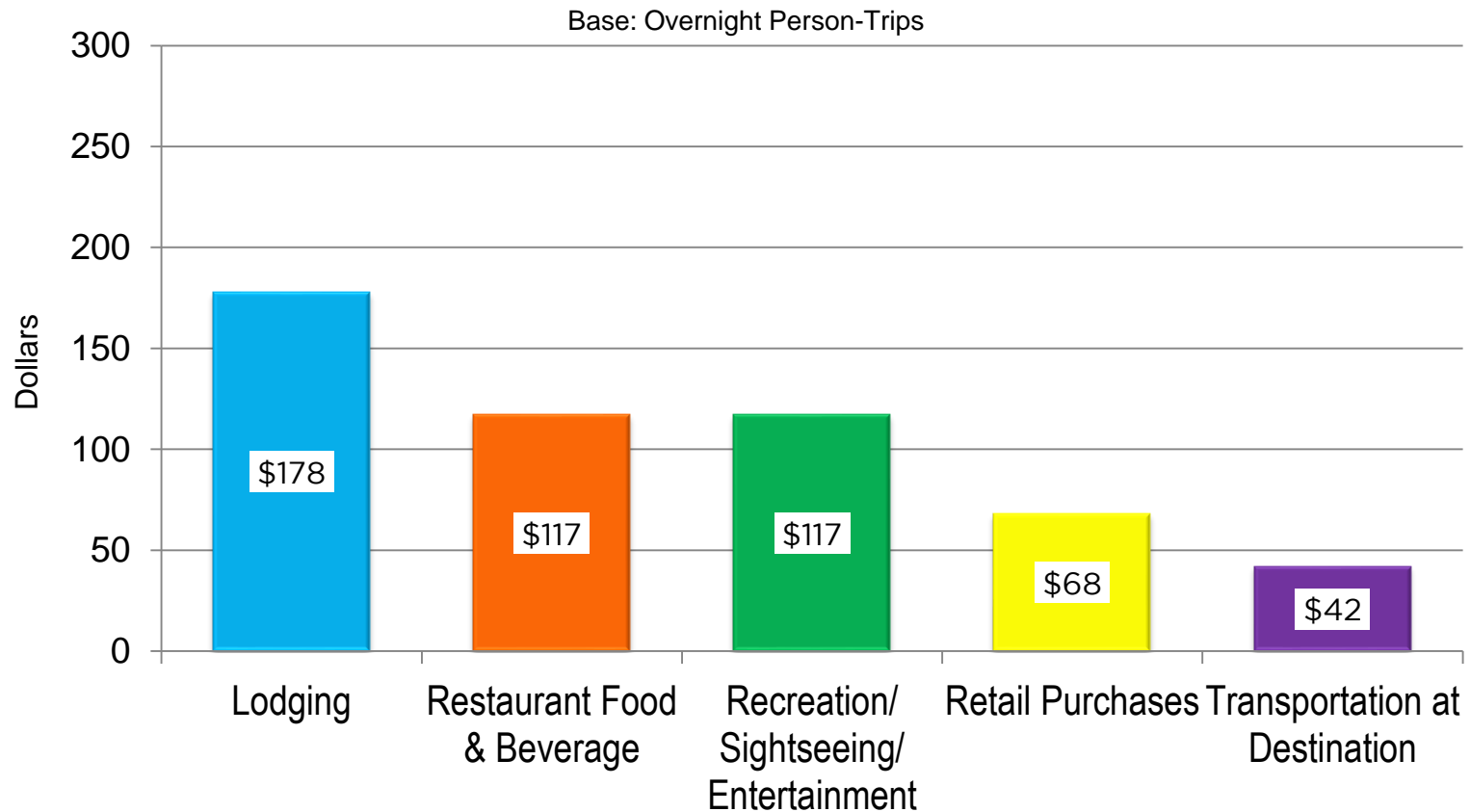
Average Per Person Expenditures on Domestic Overnight Trips — By Sector



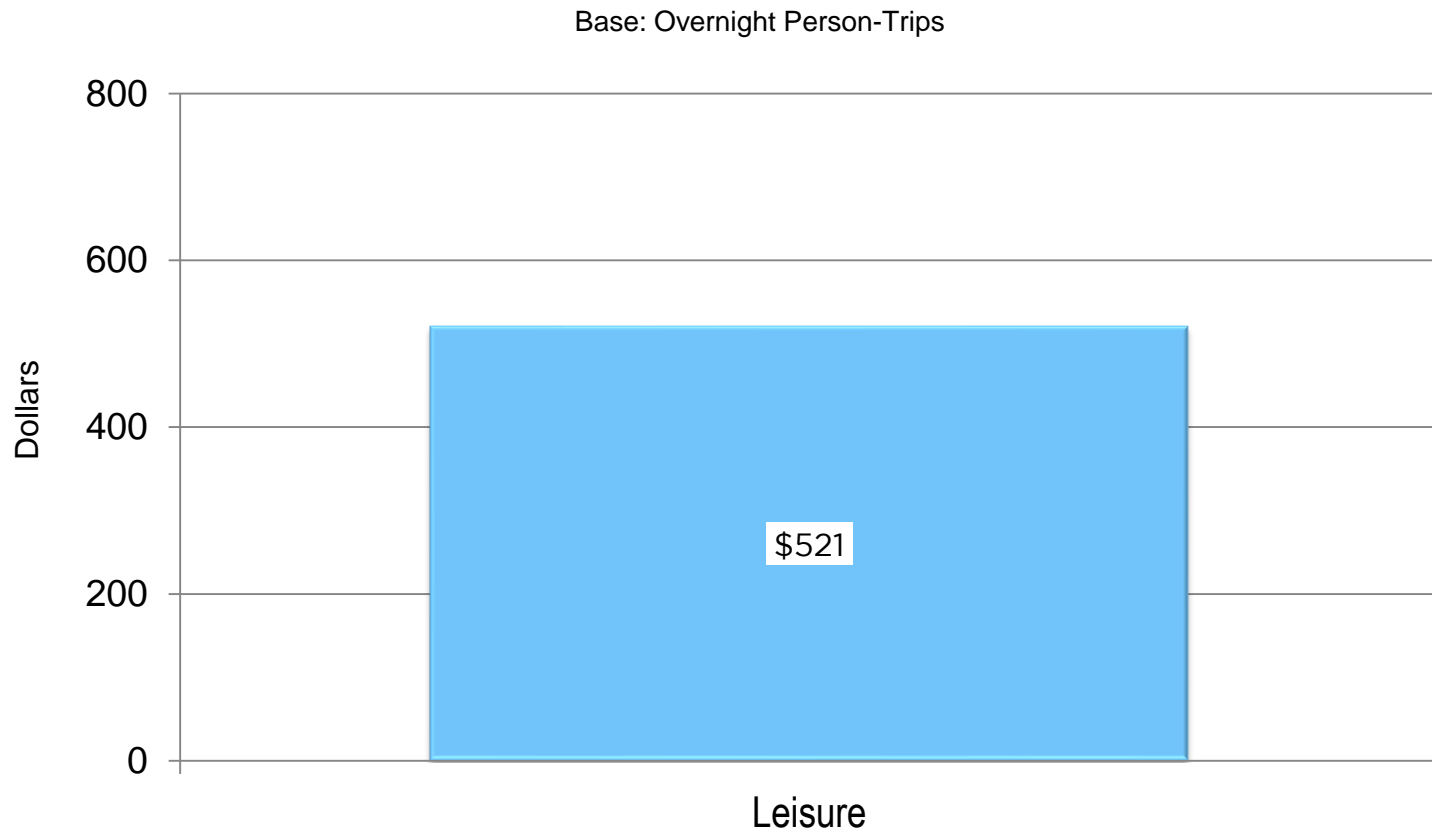
Average Per Person Expenditures on Domestic Overnight Trips — Total



Average Per Party Expenditures on Domestic Overnight Trips — By Sector



Average Per Party Expenditures on Domestic Overnight Trips — Total



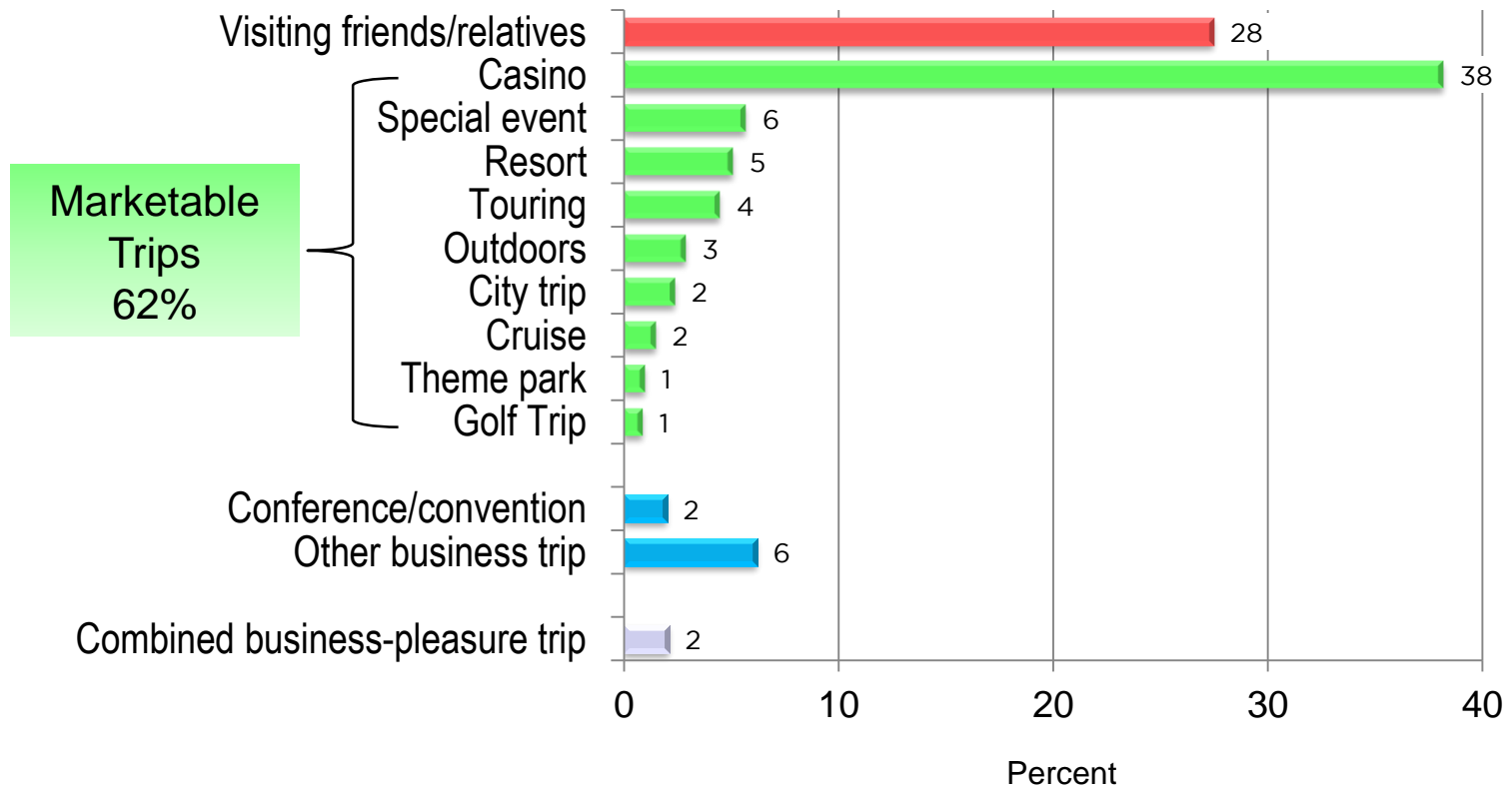


Overnight Trip Characteristics

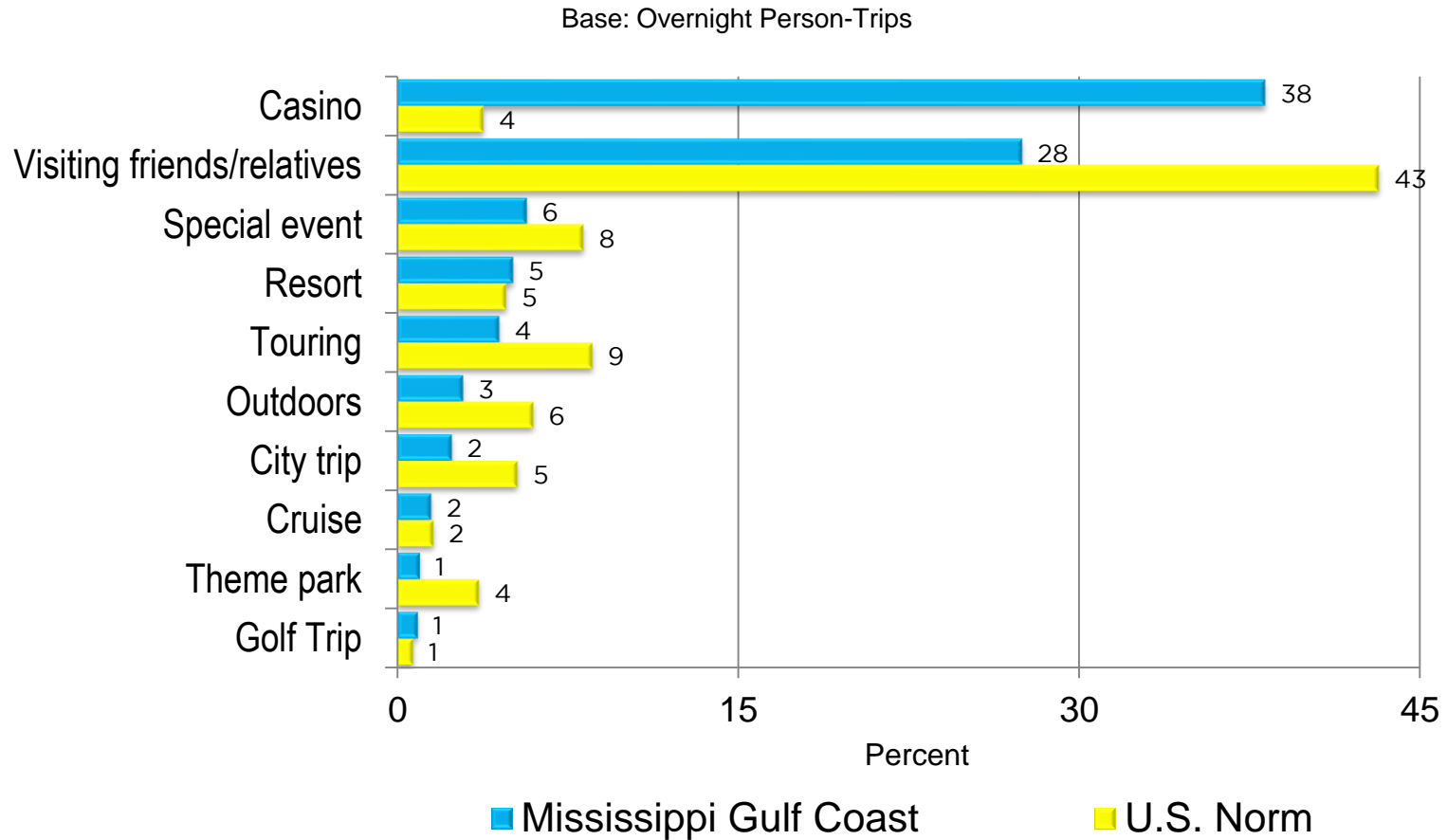


Main Purpose of Trip

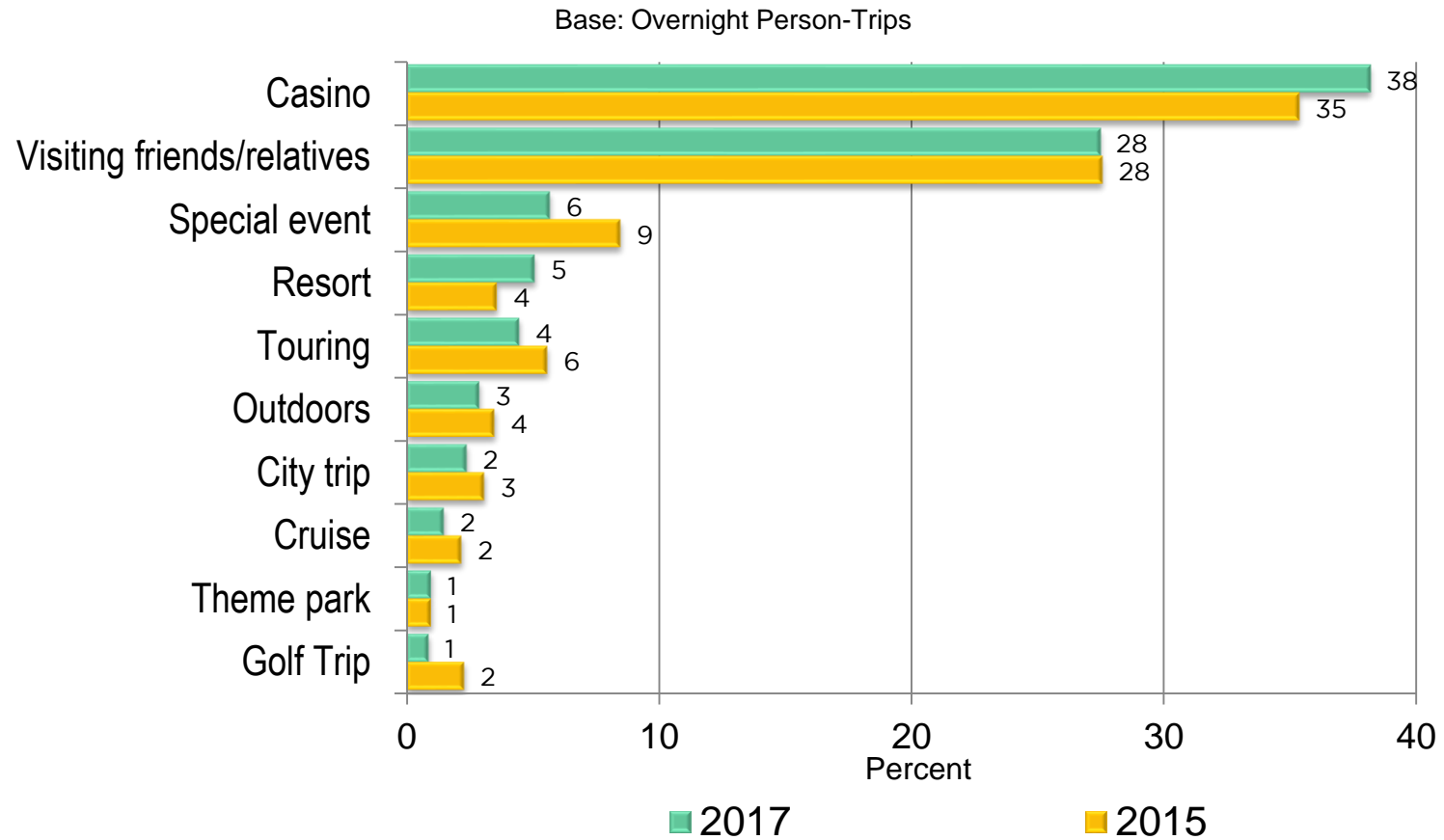
Base: Overnight Person-Trips



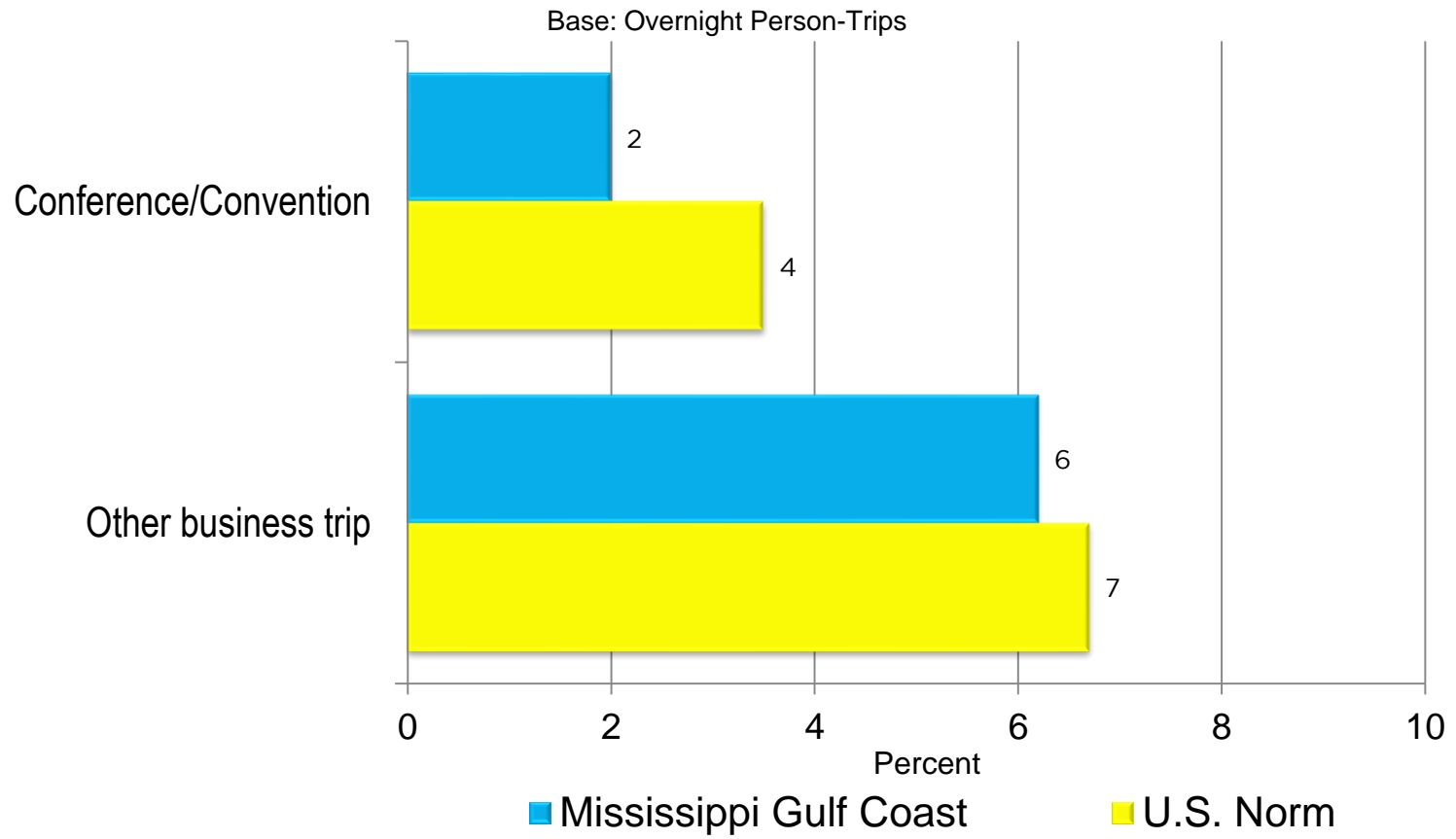
Main Purpose of Leisure Trip



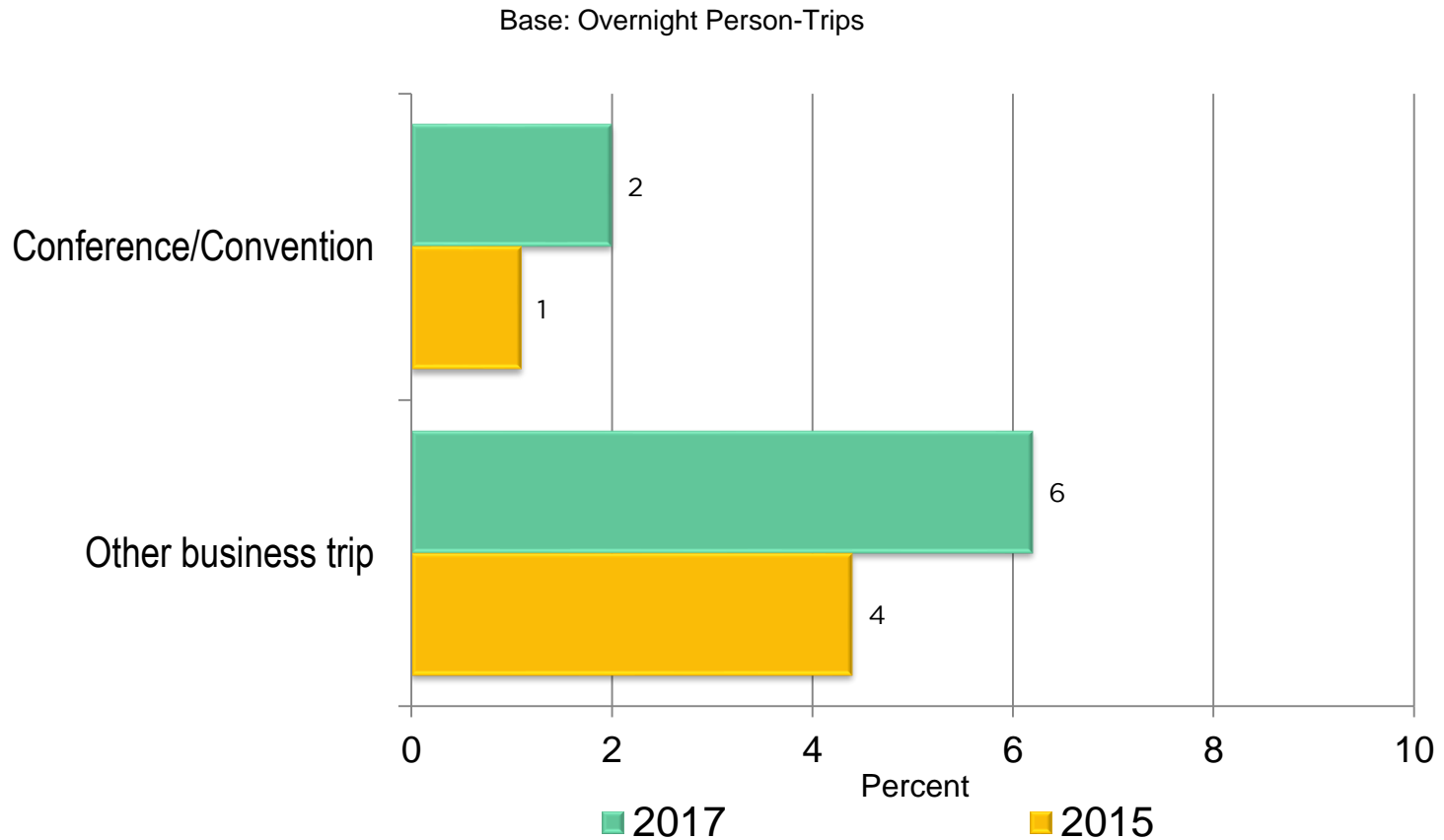
Main Purpose of Overnight Leisure Trip — 2017 vs. 2015



Main Purpose of Business Trip

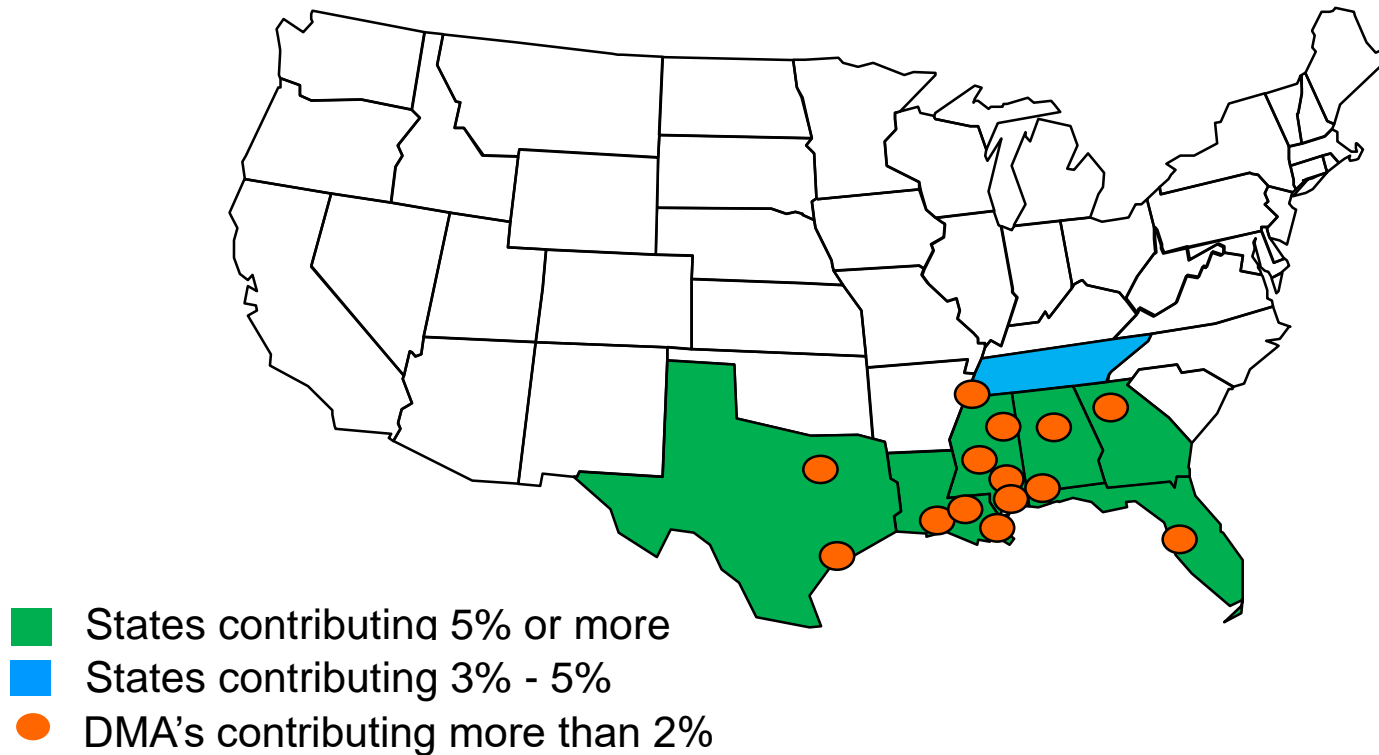


Main Purpose of Overnight Business Trip — 2017 vs. 2015

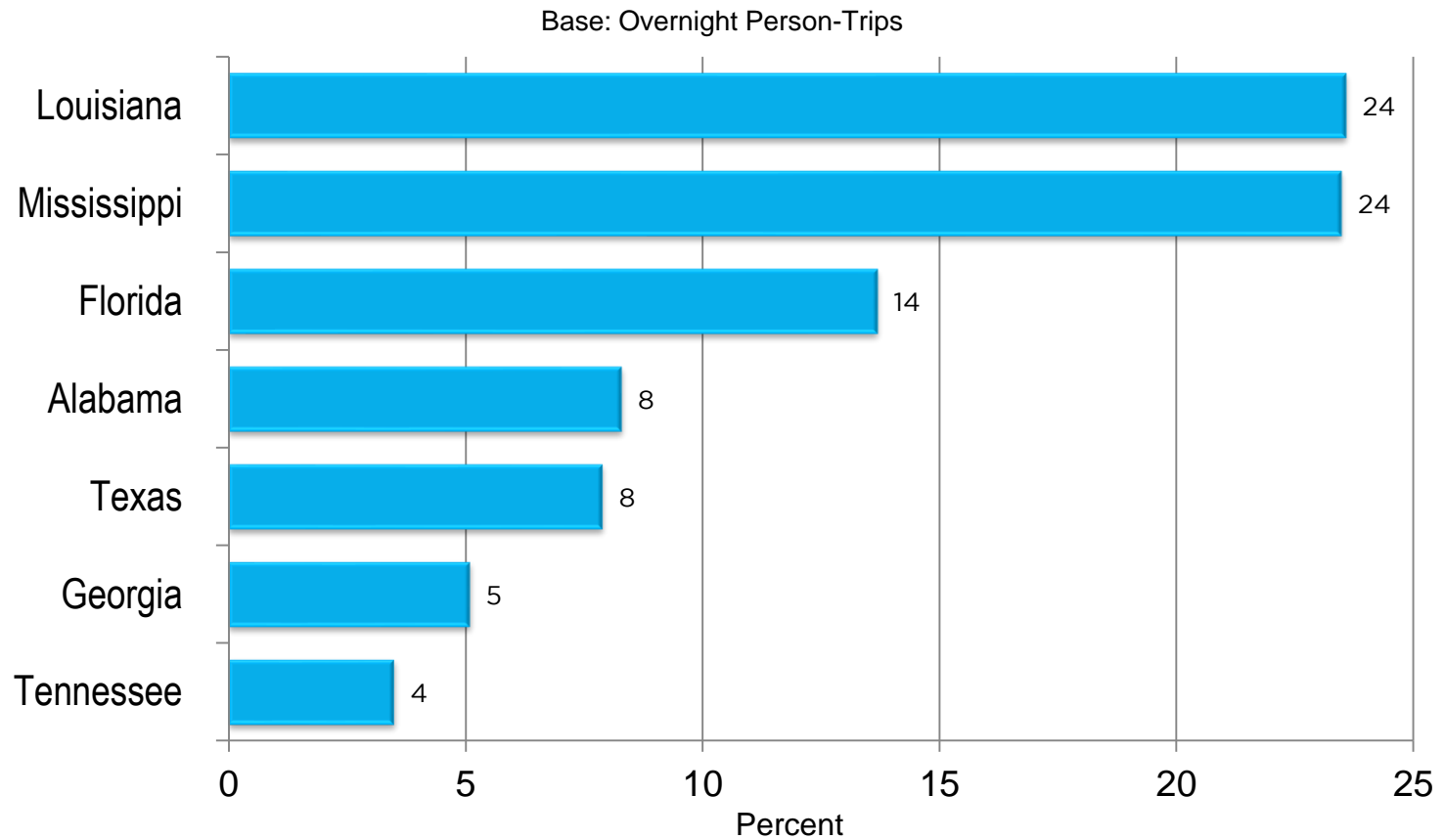


Sources of Business

Base: Overnight Person-Trips

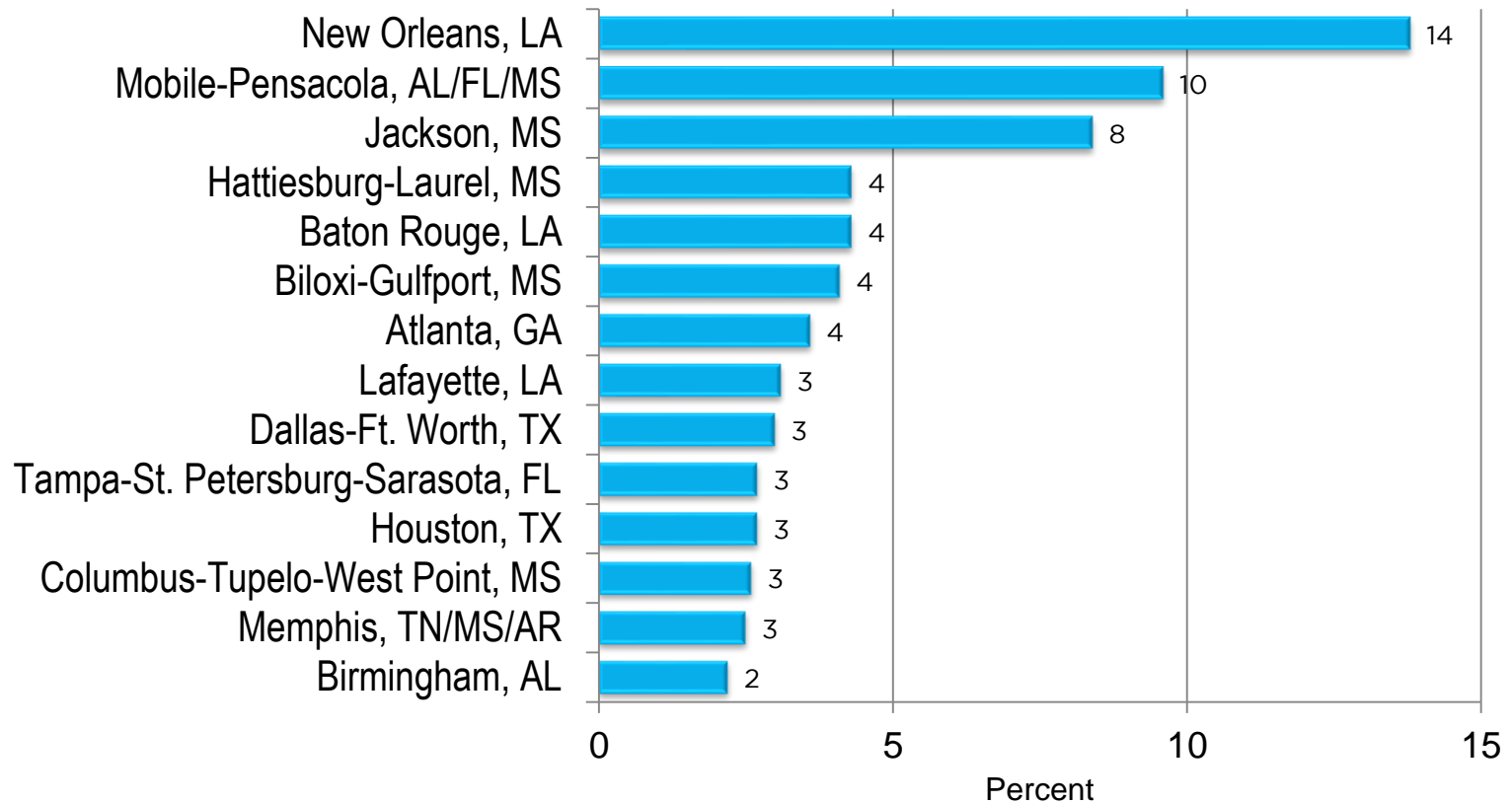


State Origin Of Trip

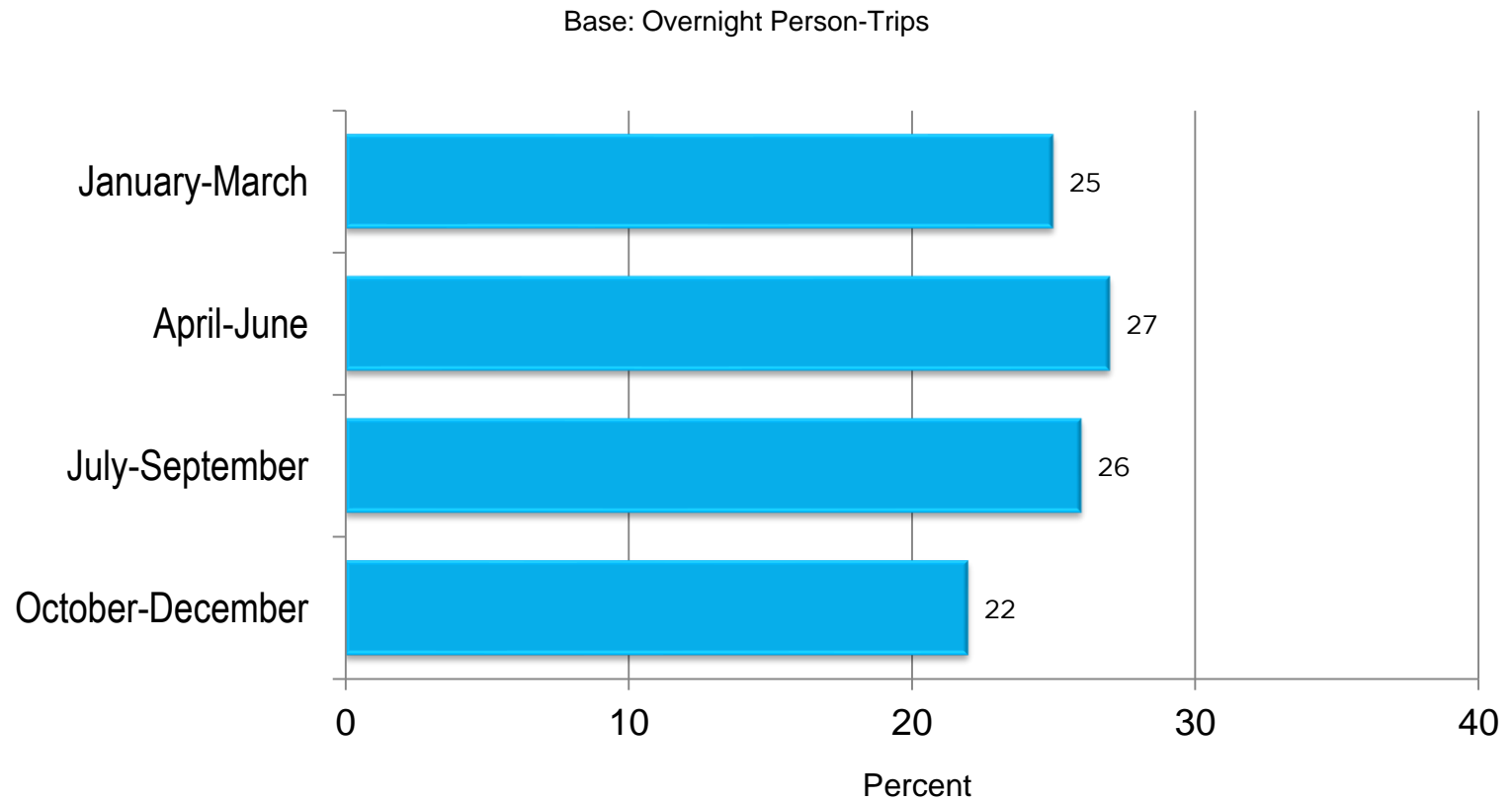


DMA Origin Of Trip

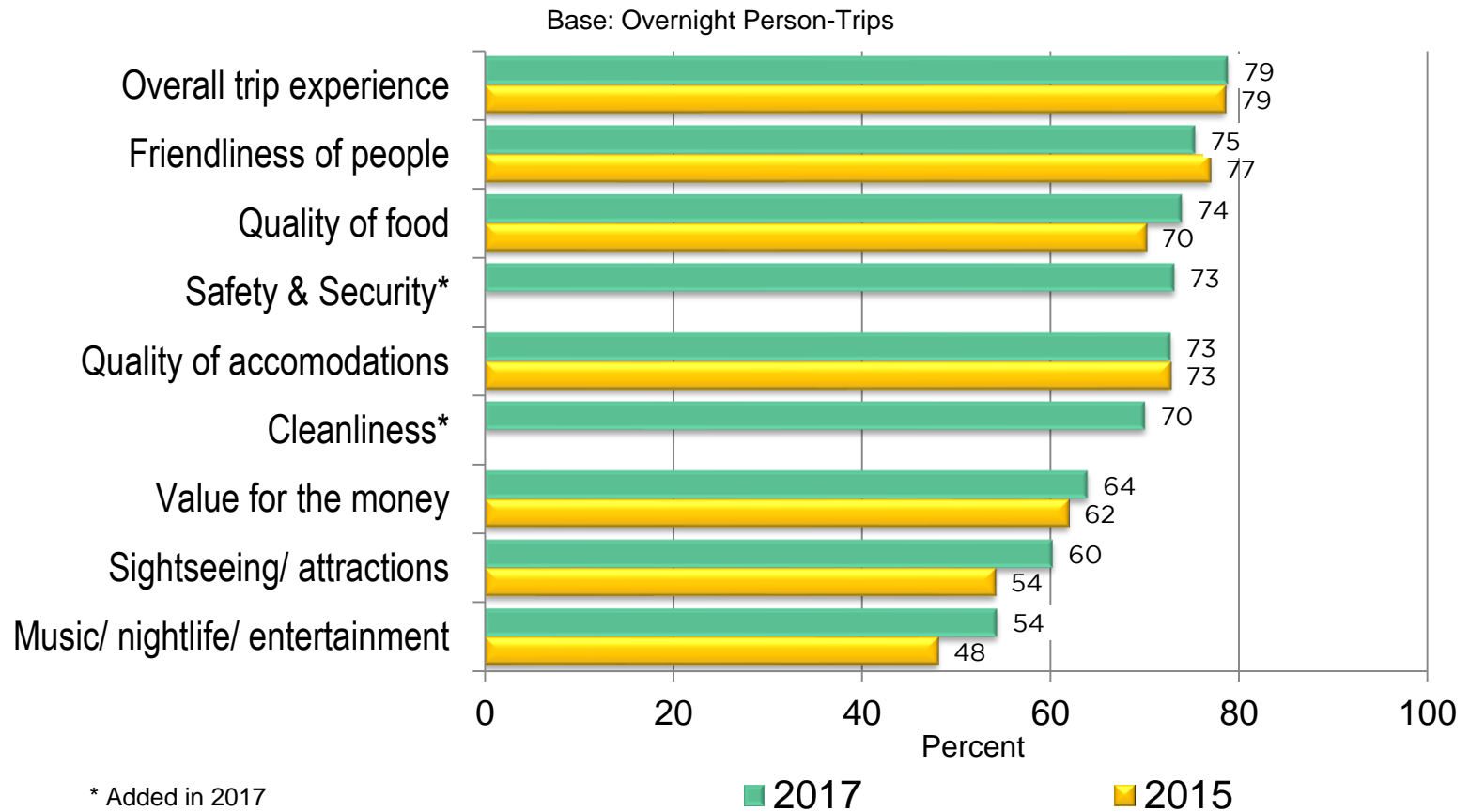
Base: Overnight Person-Trips



Season of Trip

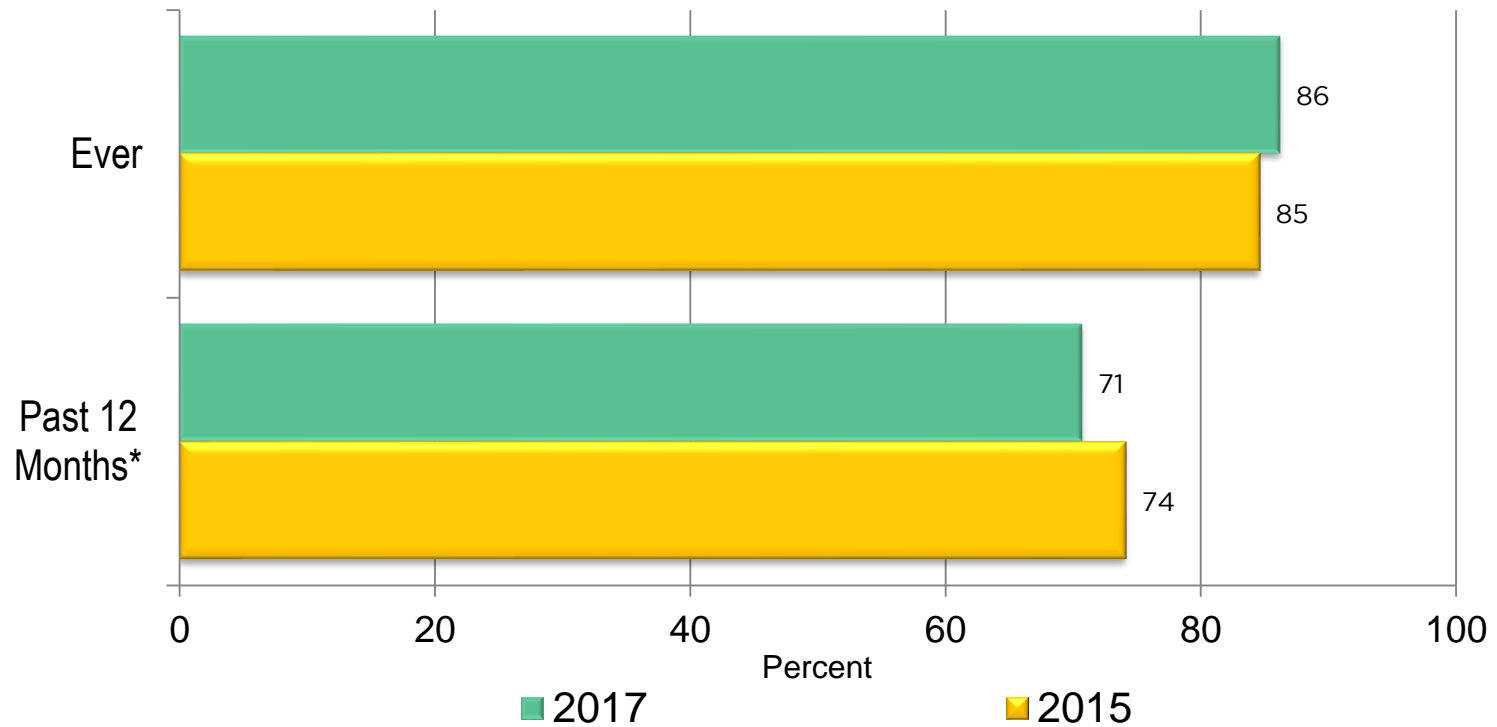


% Very Satisfied with Trip



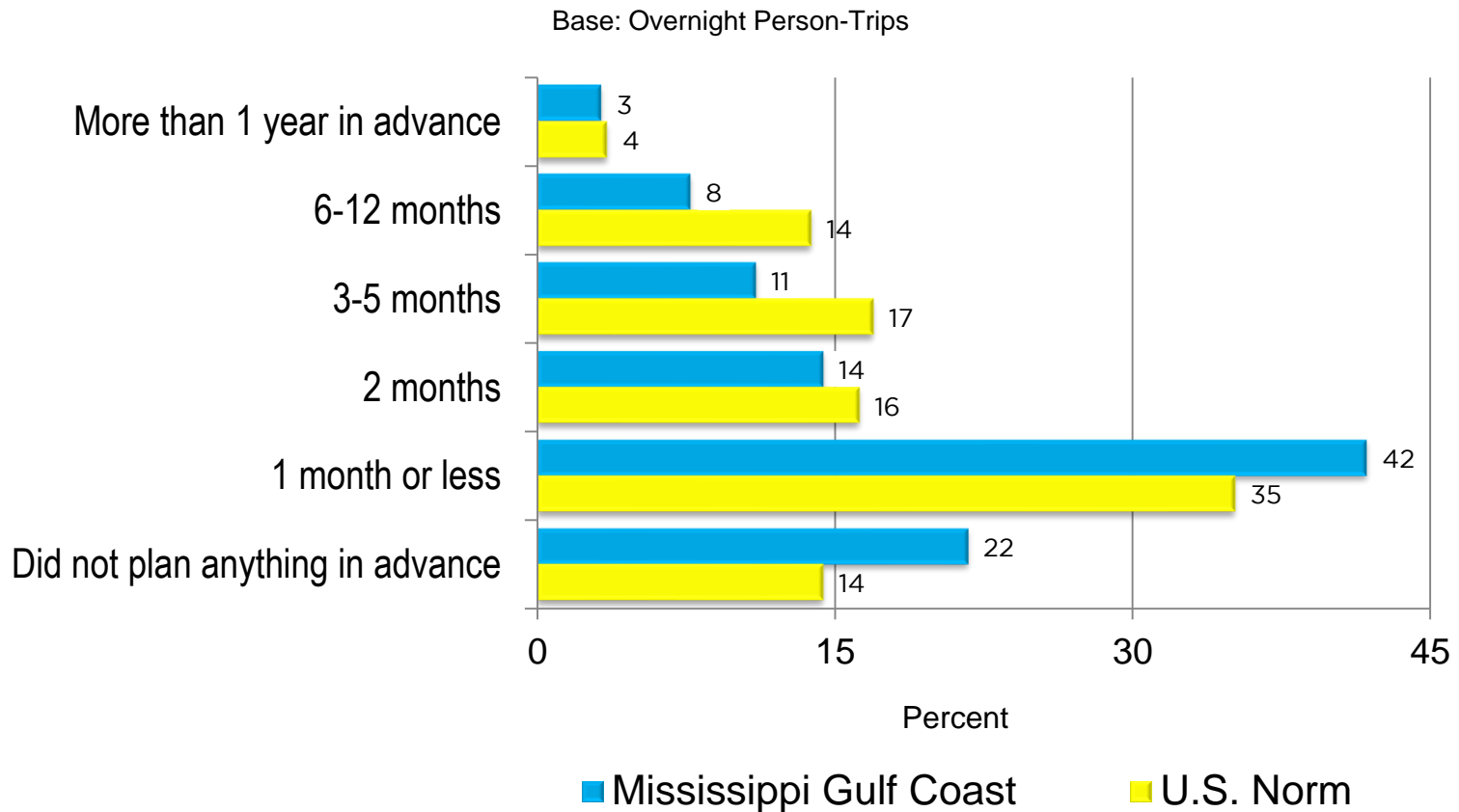
Past Visitation to Mississippi Gulf Coast

Base: Overnight Person-Trips



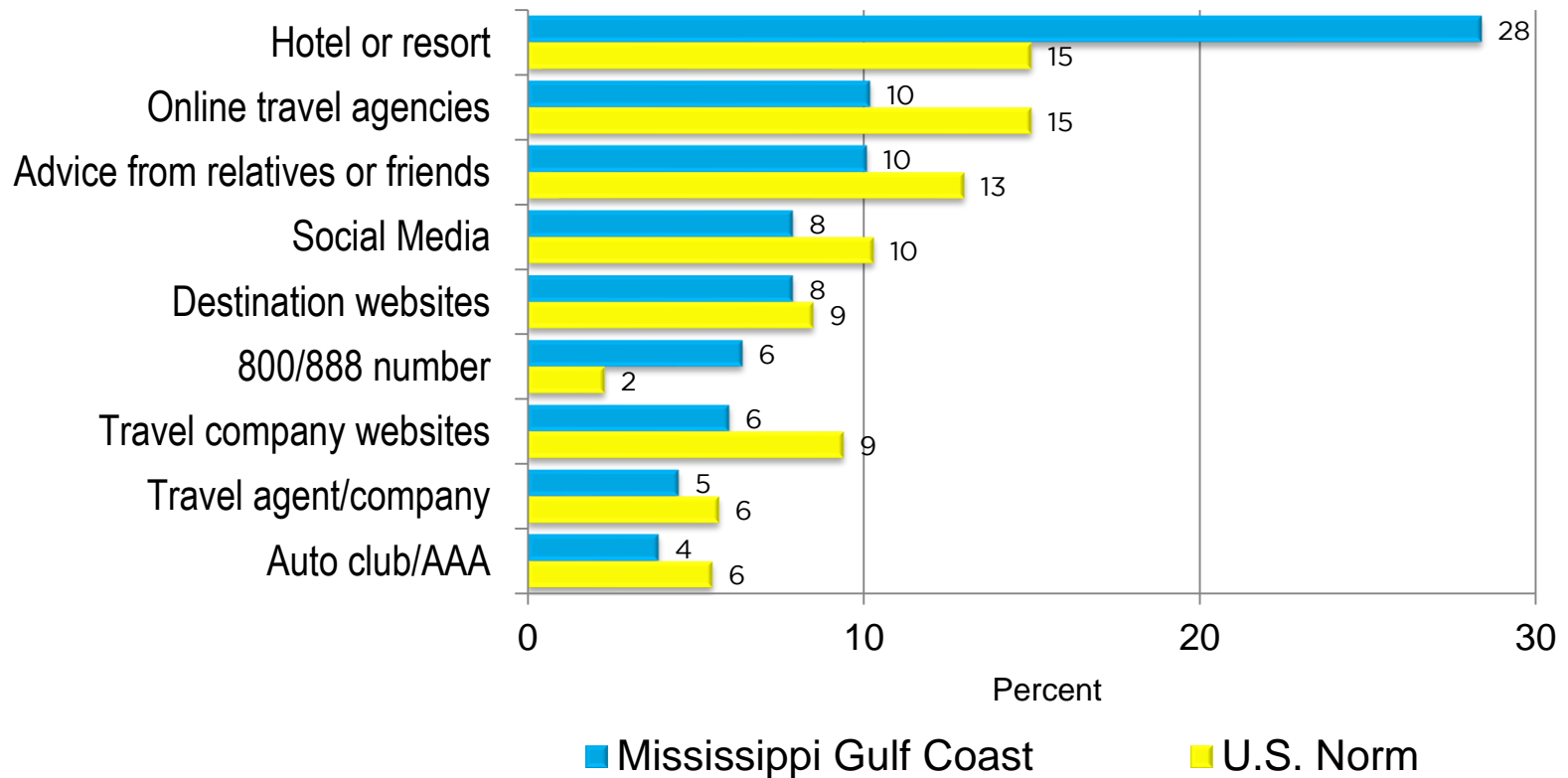
* Question wording changed in 2017

Length of Trip Planning

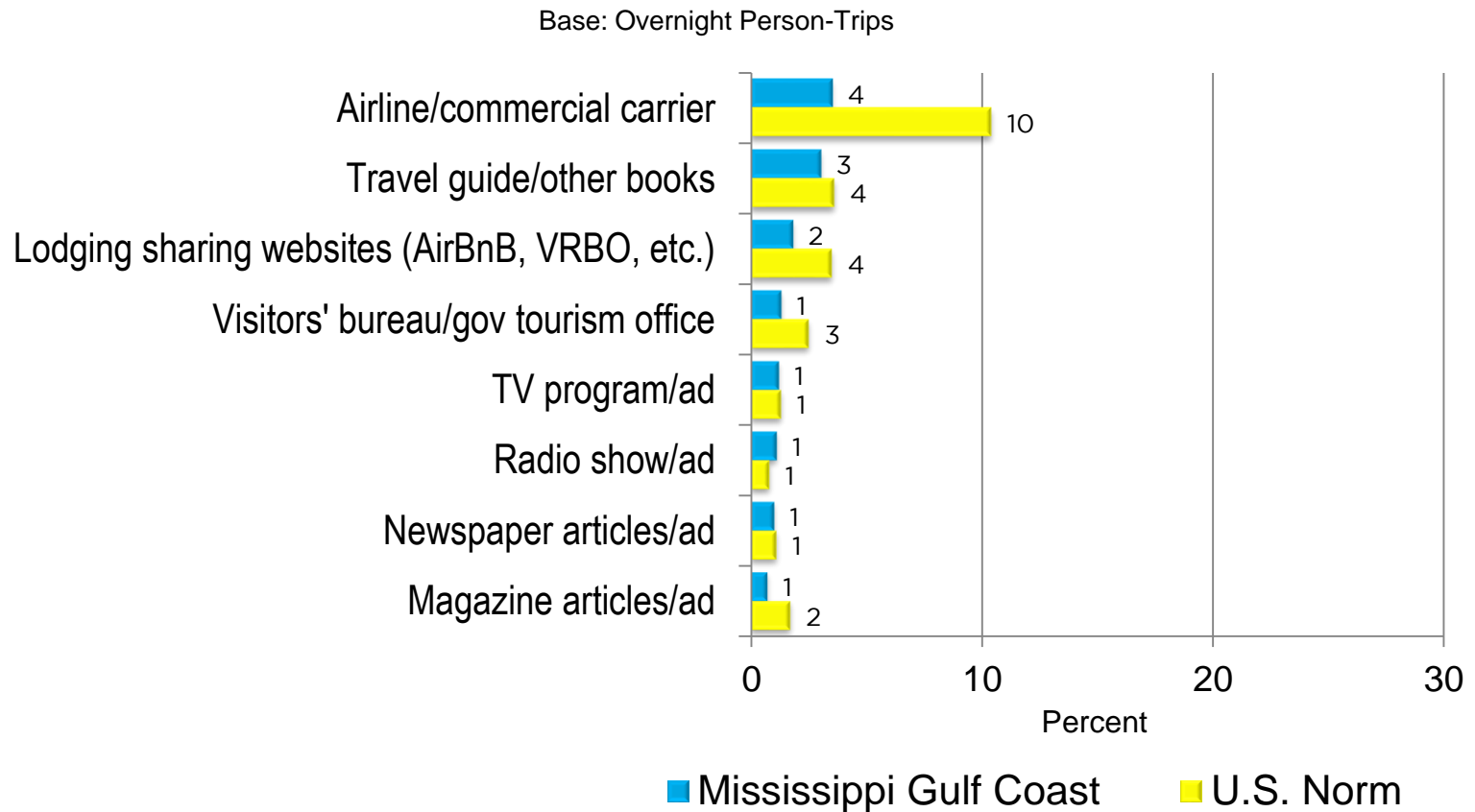


Trip Planning Information Sources

Base: Overnight Person-Trips

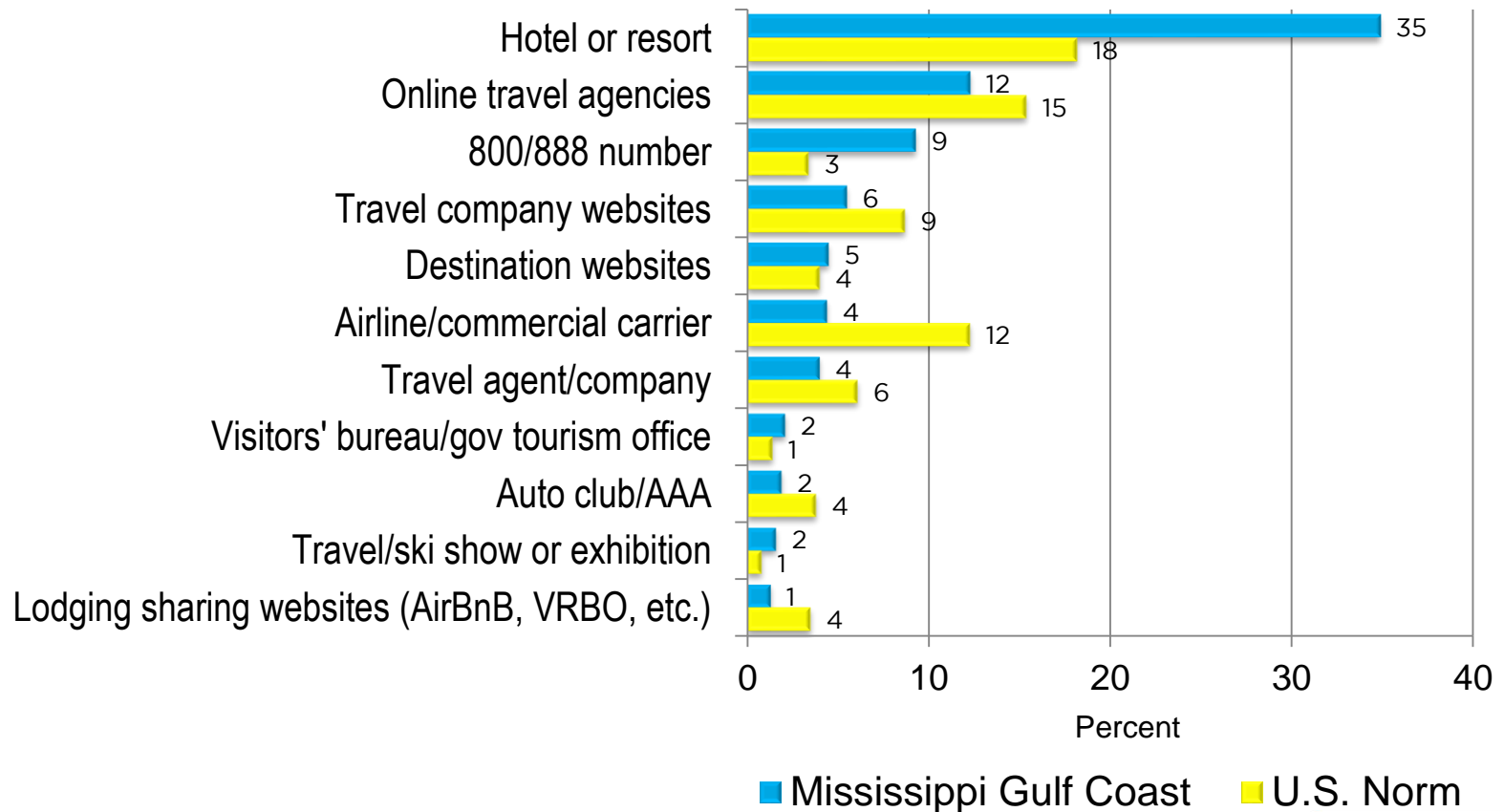


Trip Planning Information Sources (Cont'd)

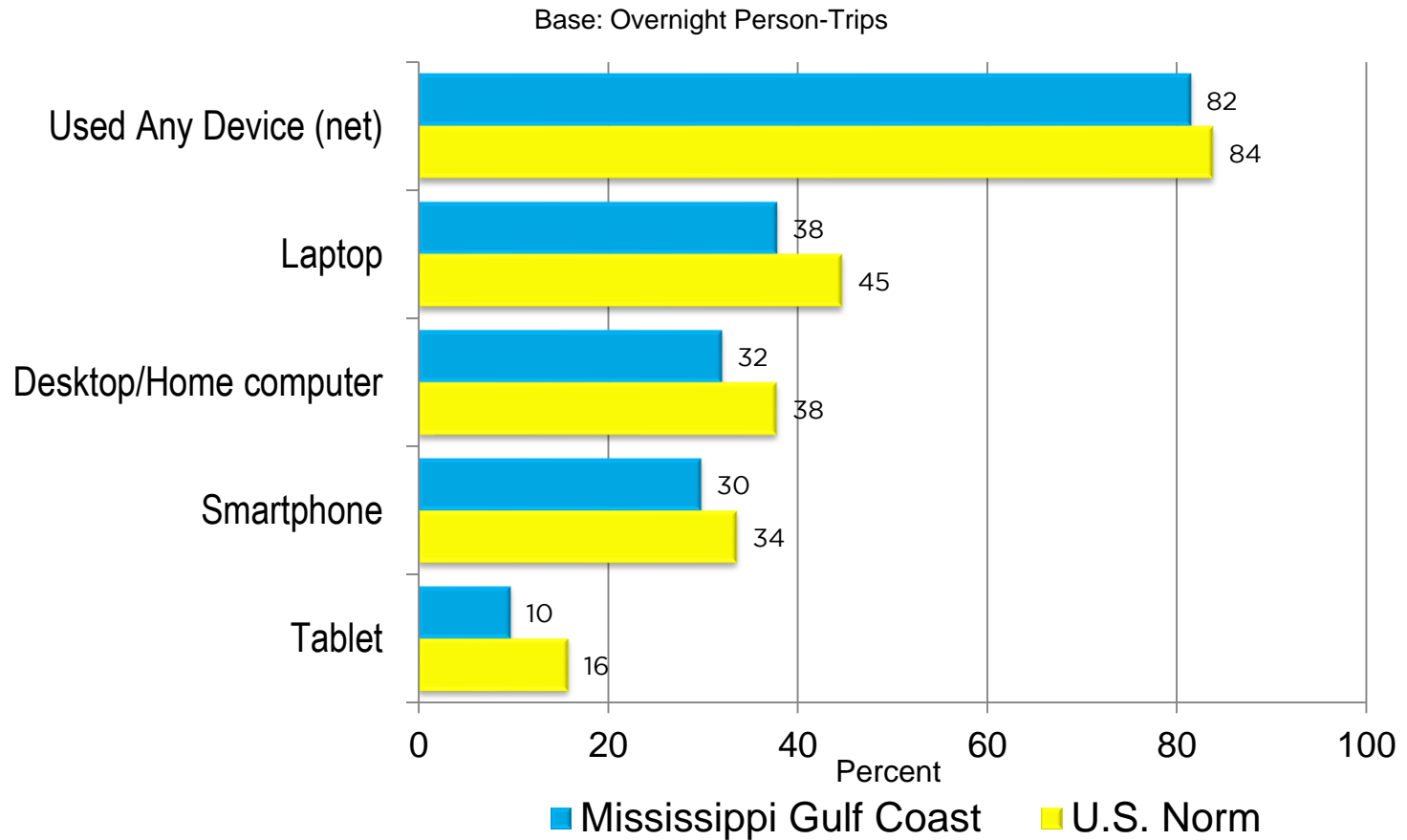


Method of Booking

Base: Overnight Person-Trips

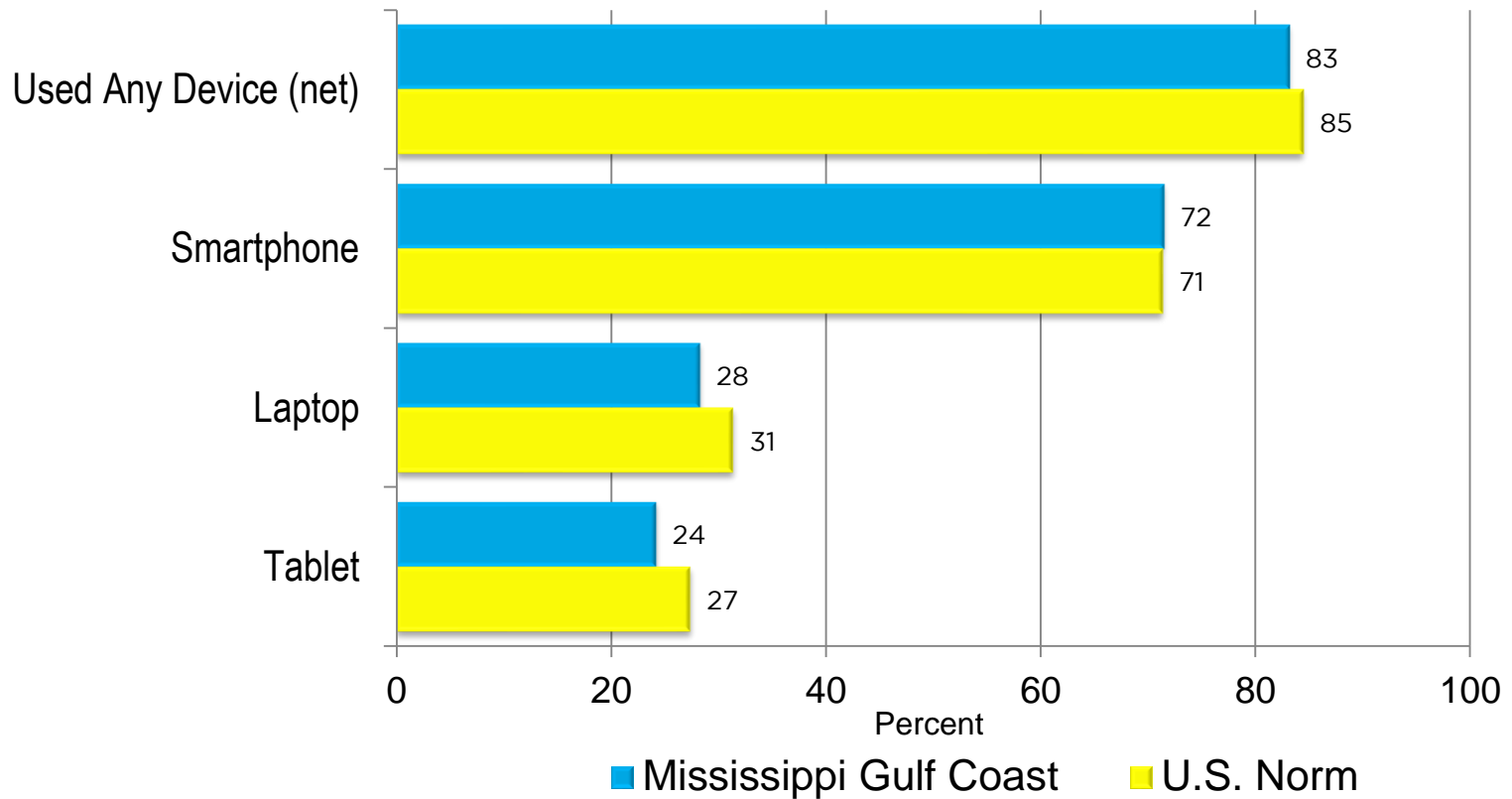


Devices Used for Trip Planning



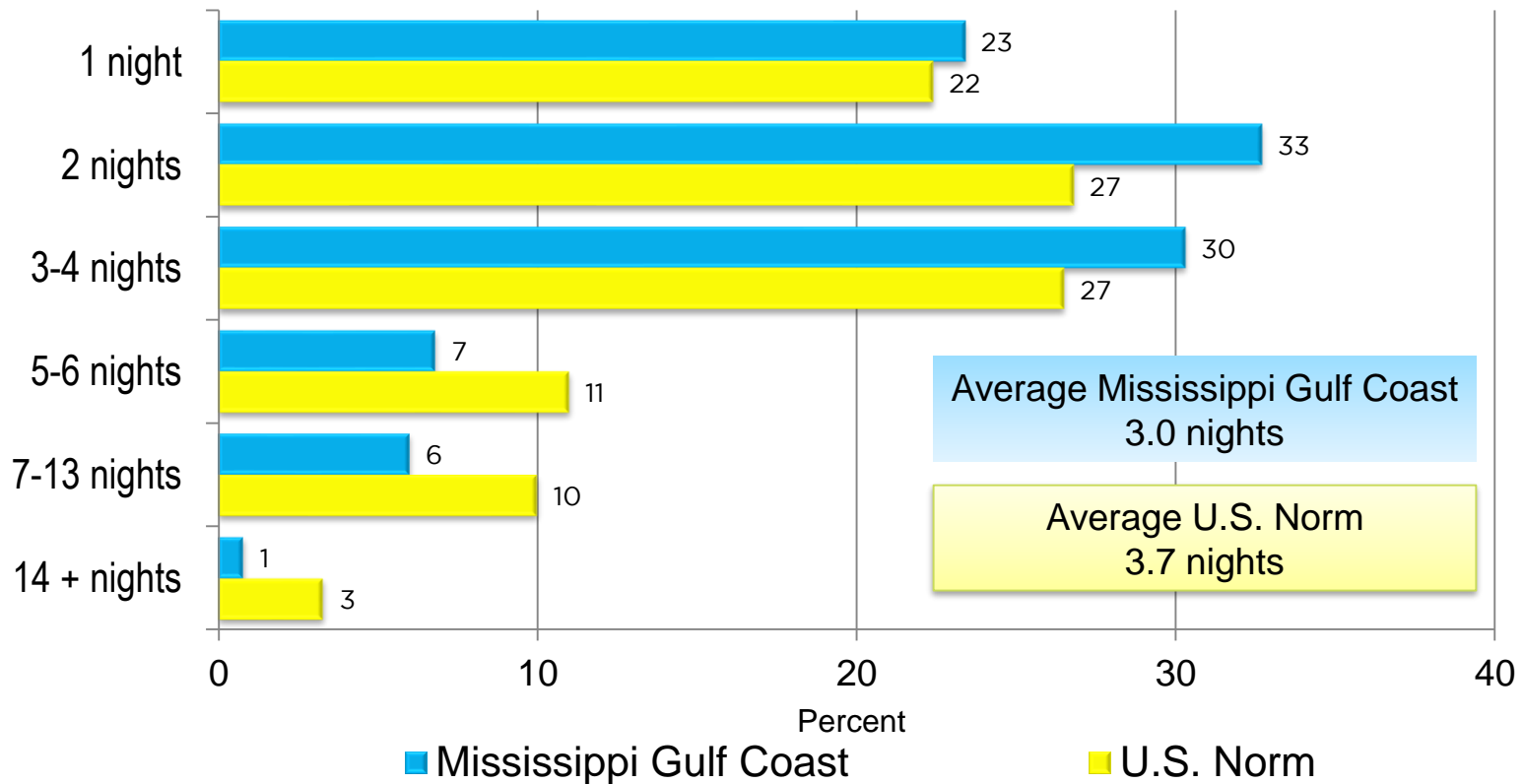
Devices Used During Trip

Base: Overnight Person-Trips



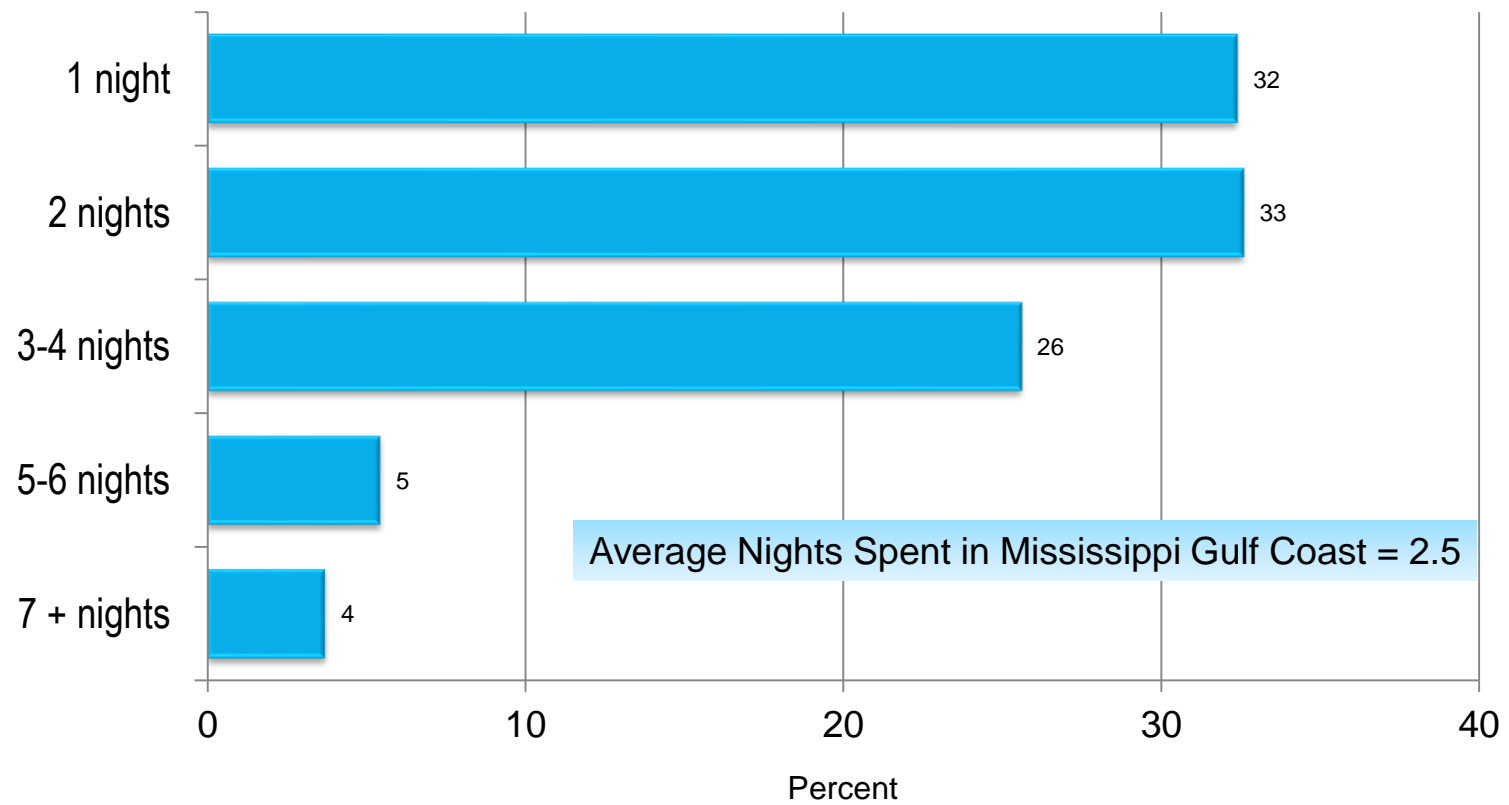
Total Nights Away on Trip

Base: Overnight Person-Trips

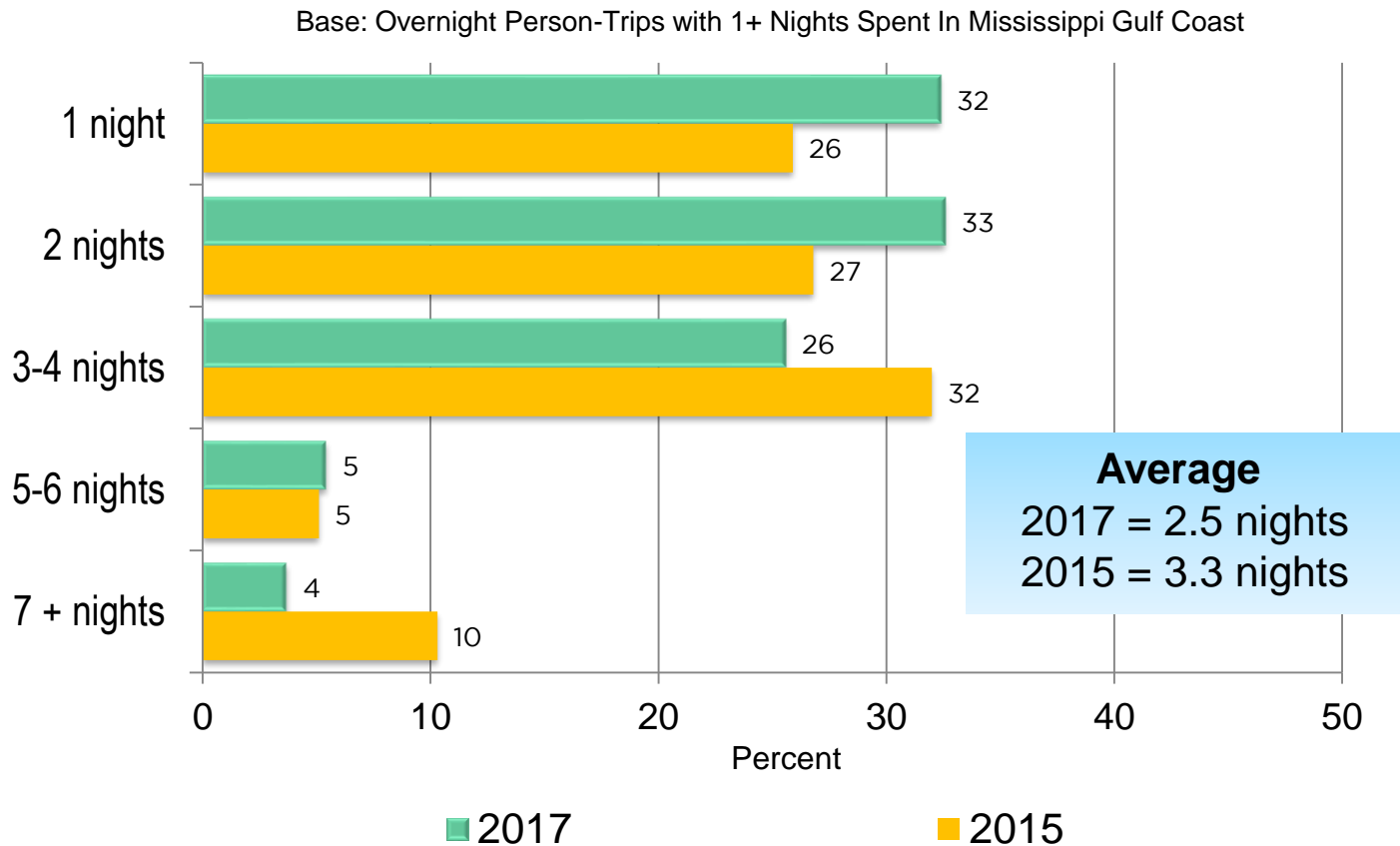


Number of Nights Spent in Mississippi Gulf Coast

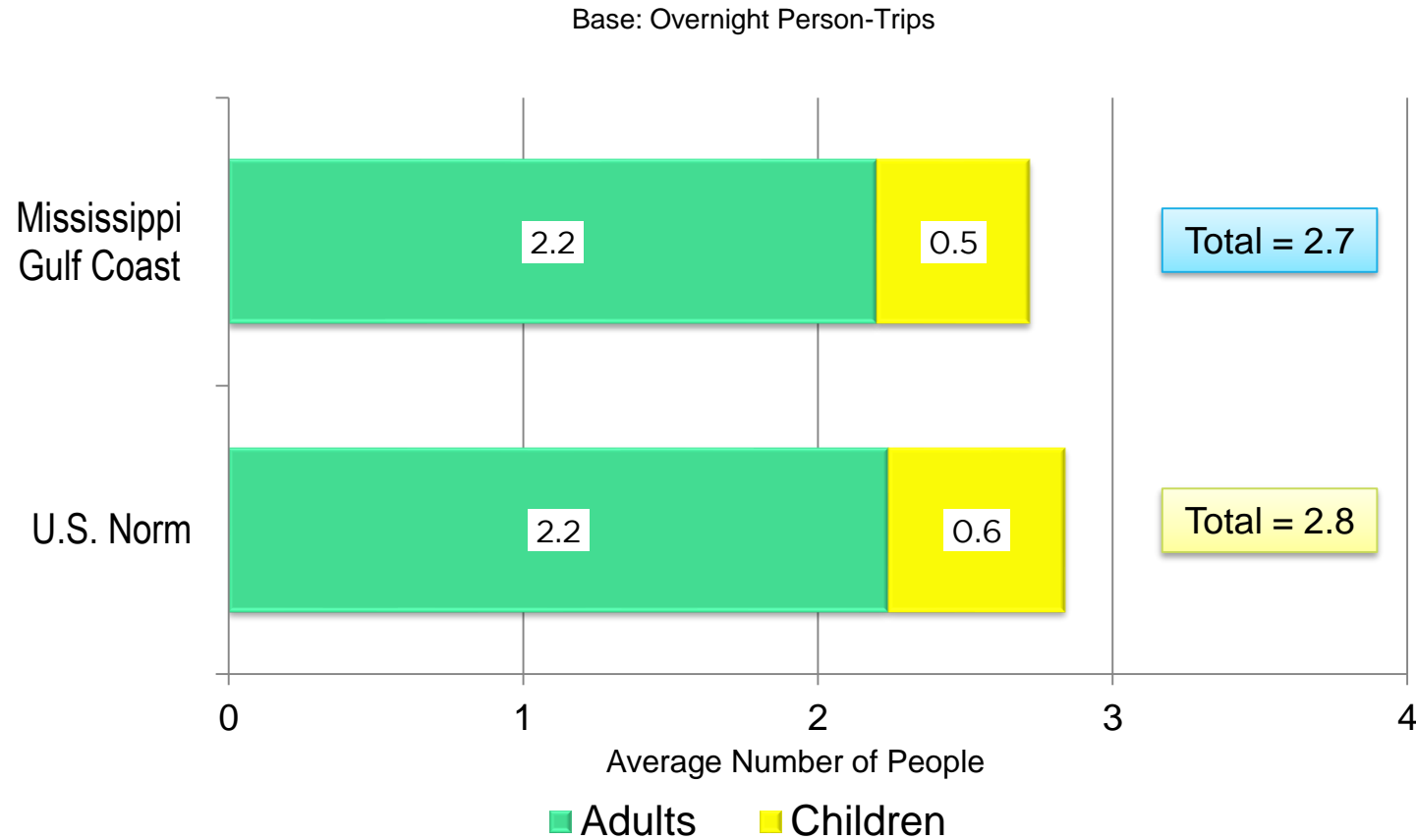
Base: Overnight Person-Trips with 1+ Nights Spent In Mississippi Gulf Coast



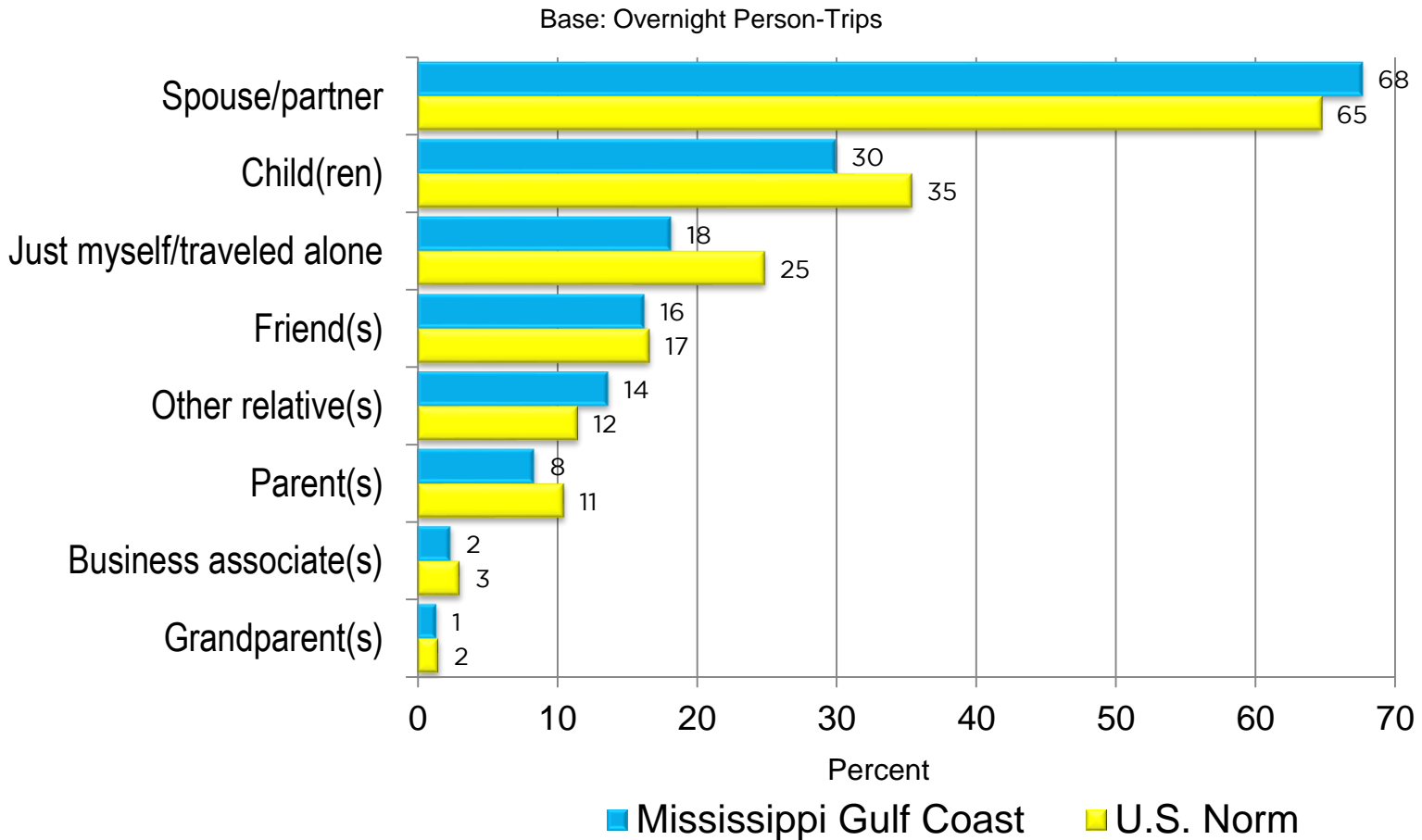
Number of Nights Spent in Mississippi Gulf Coast - 2017 vs. 2015



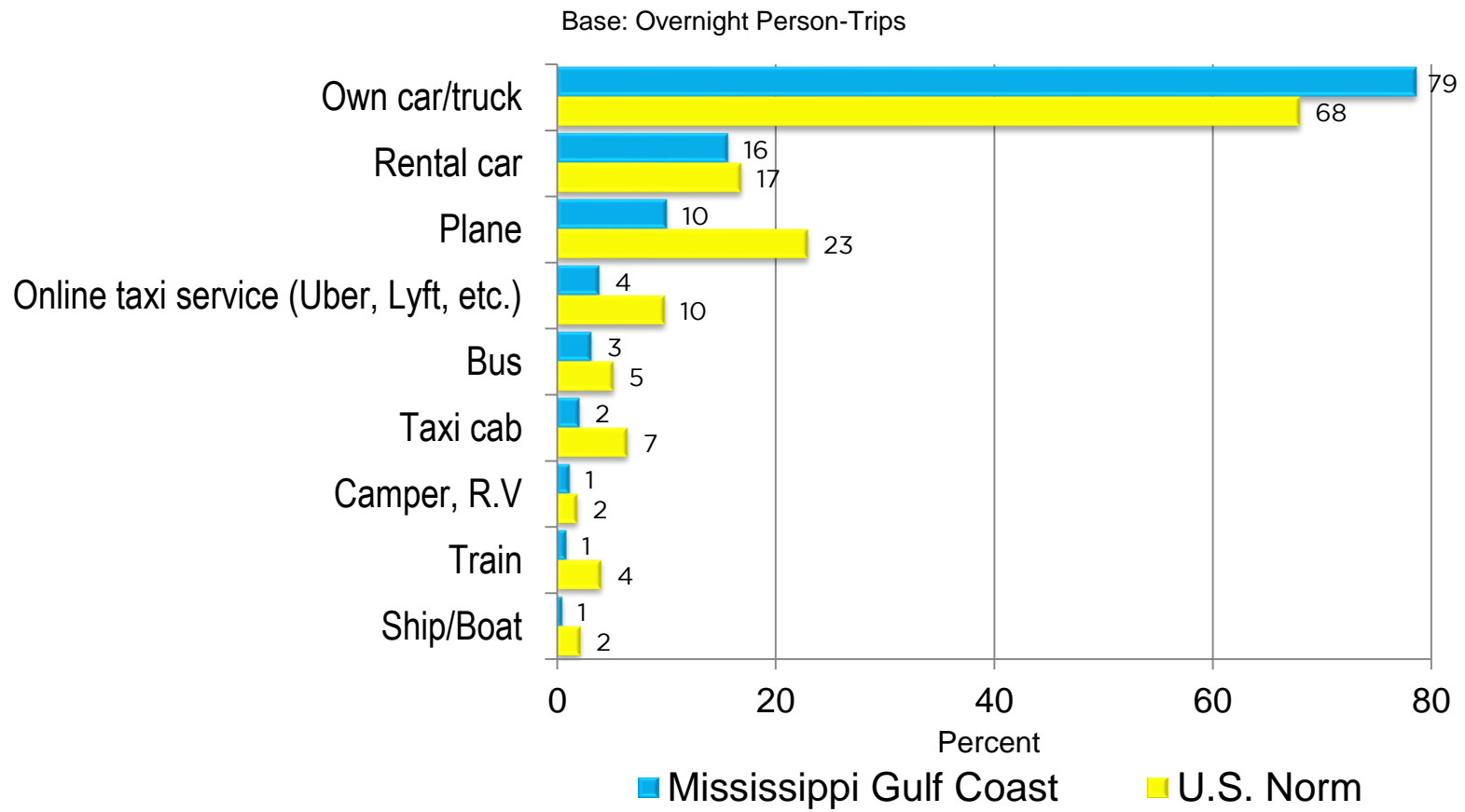
Size of Travel Party



Composition of Immediate Travel Party

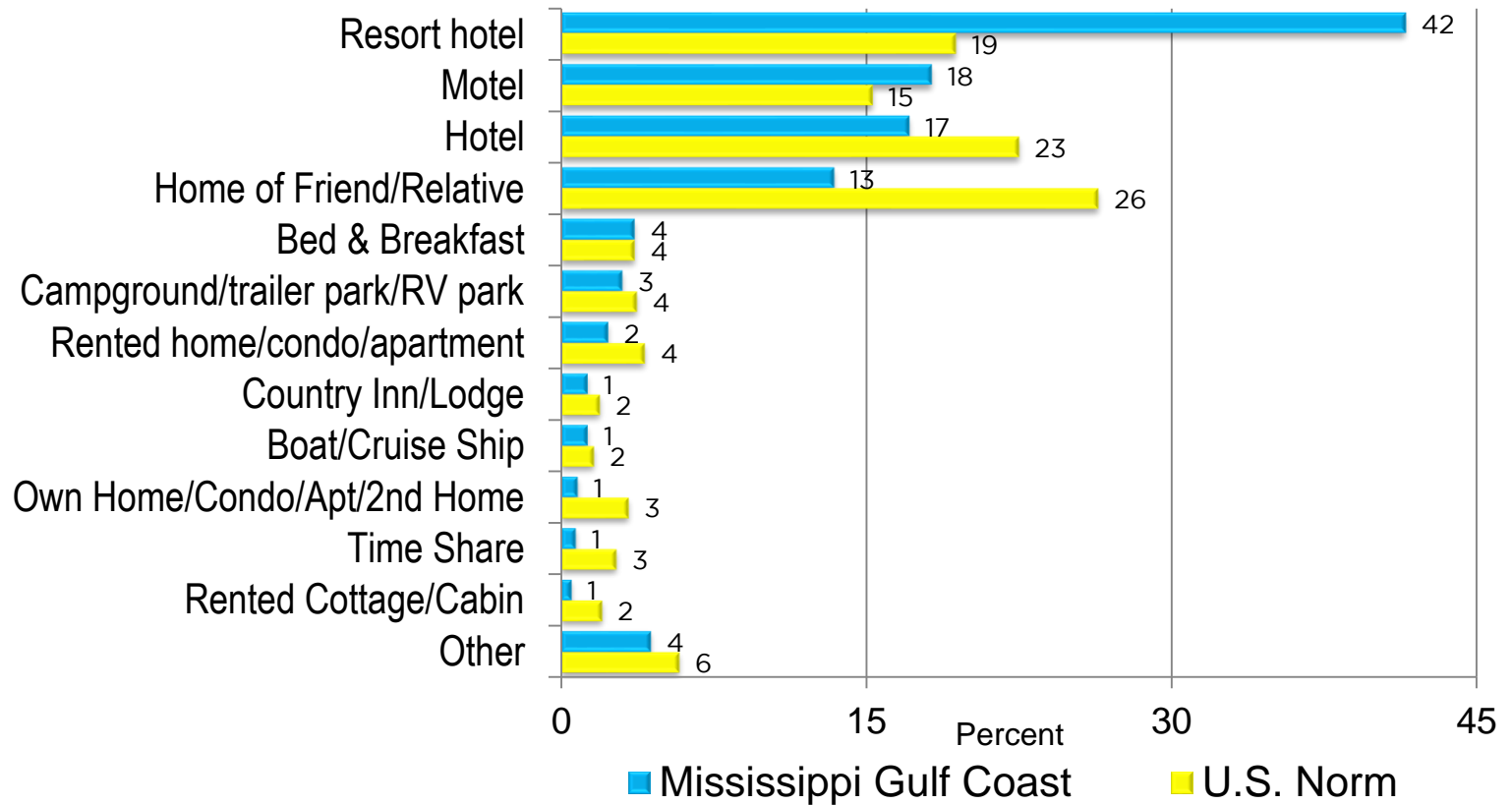


Transportation



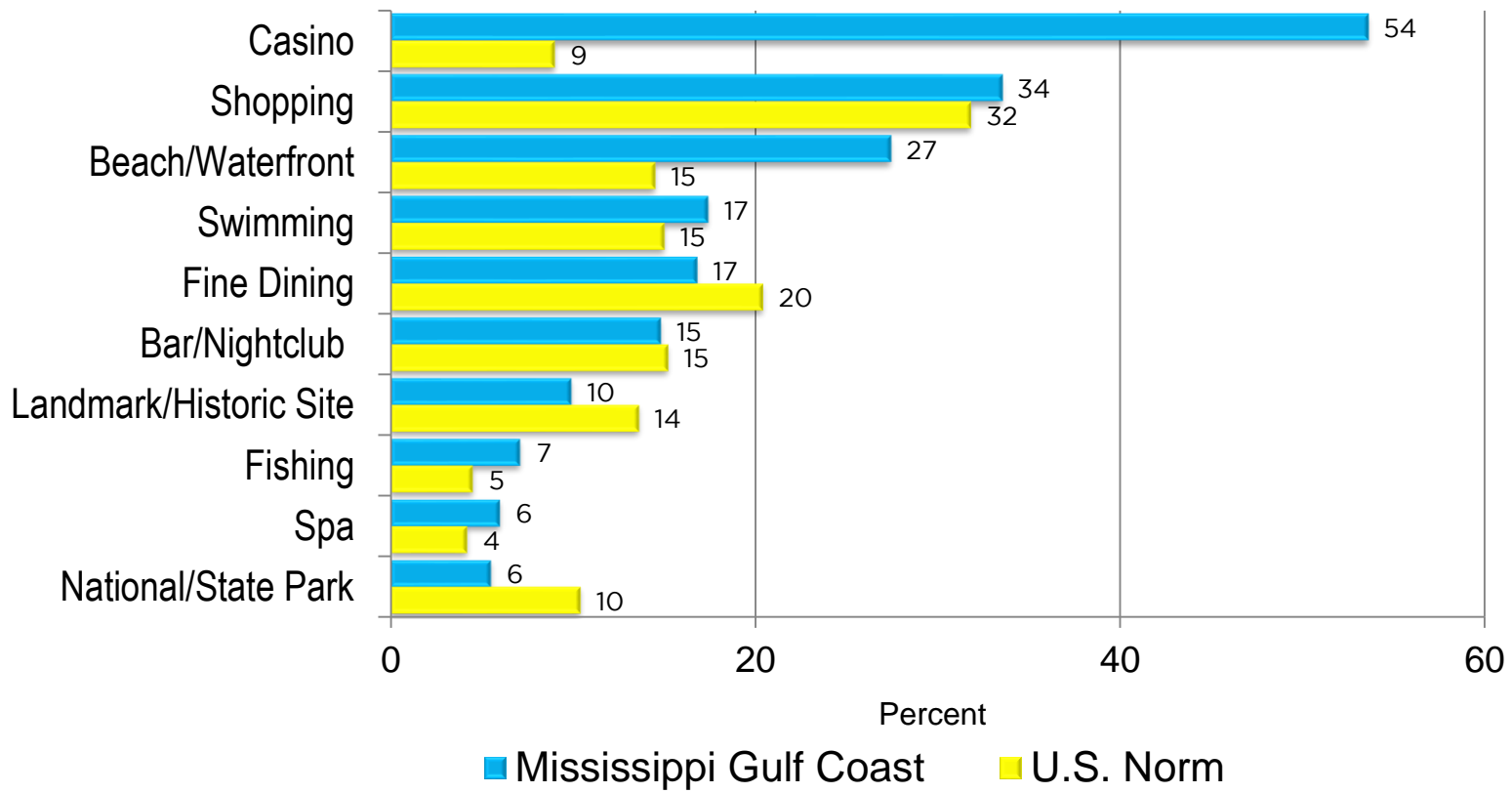
Accommodations

Base: Overnight Person-Trips

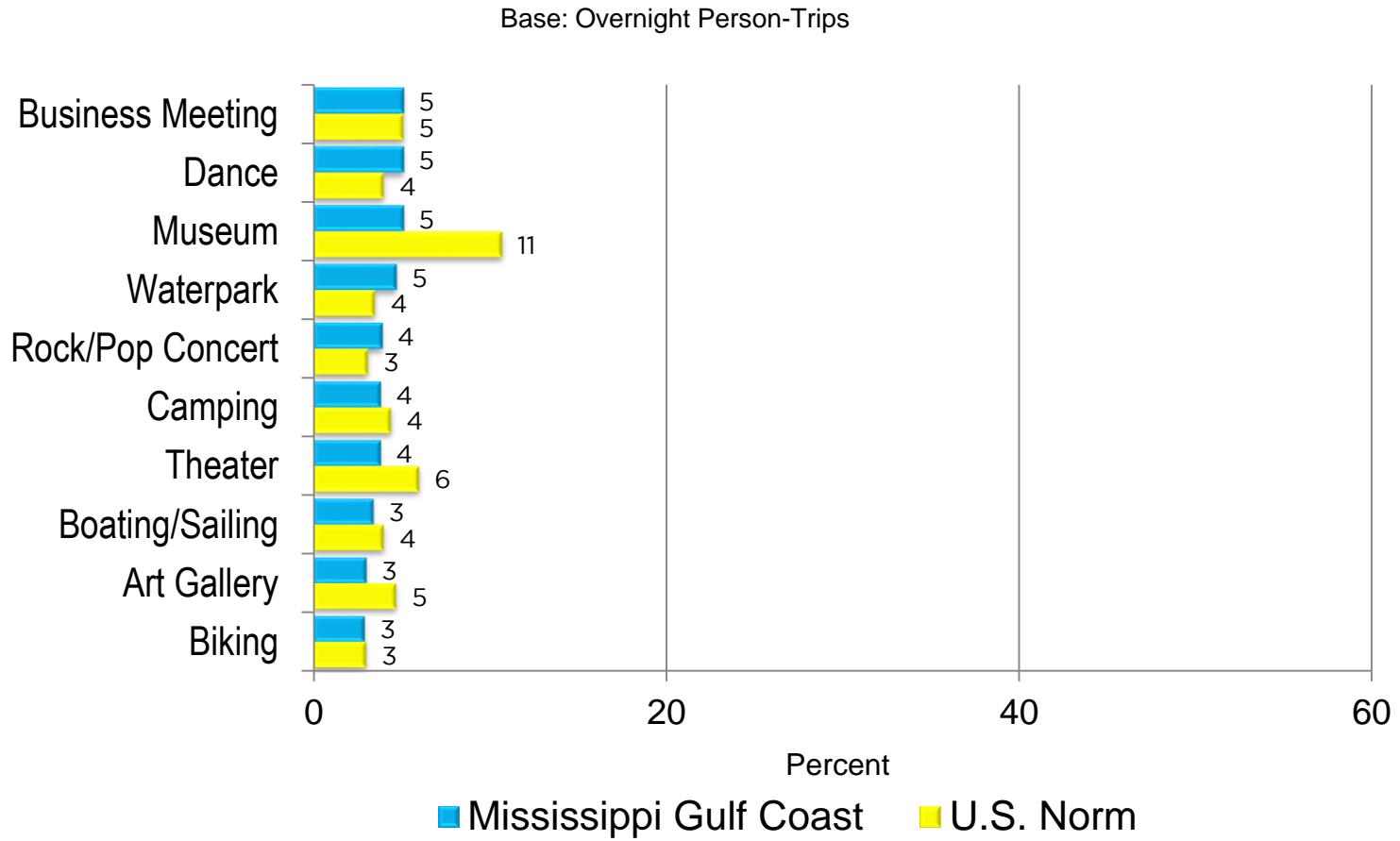


Activities and Experiences

Base: Overnight Person-Trips

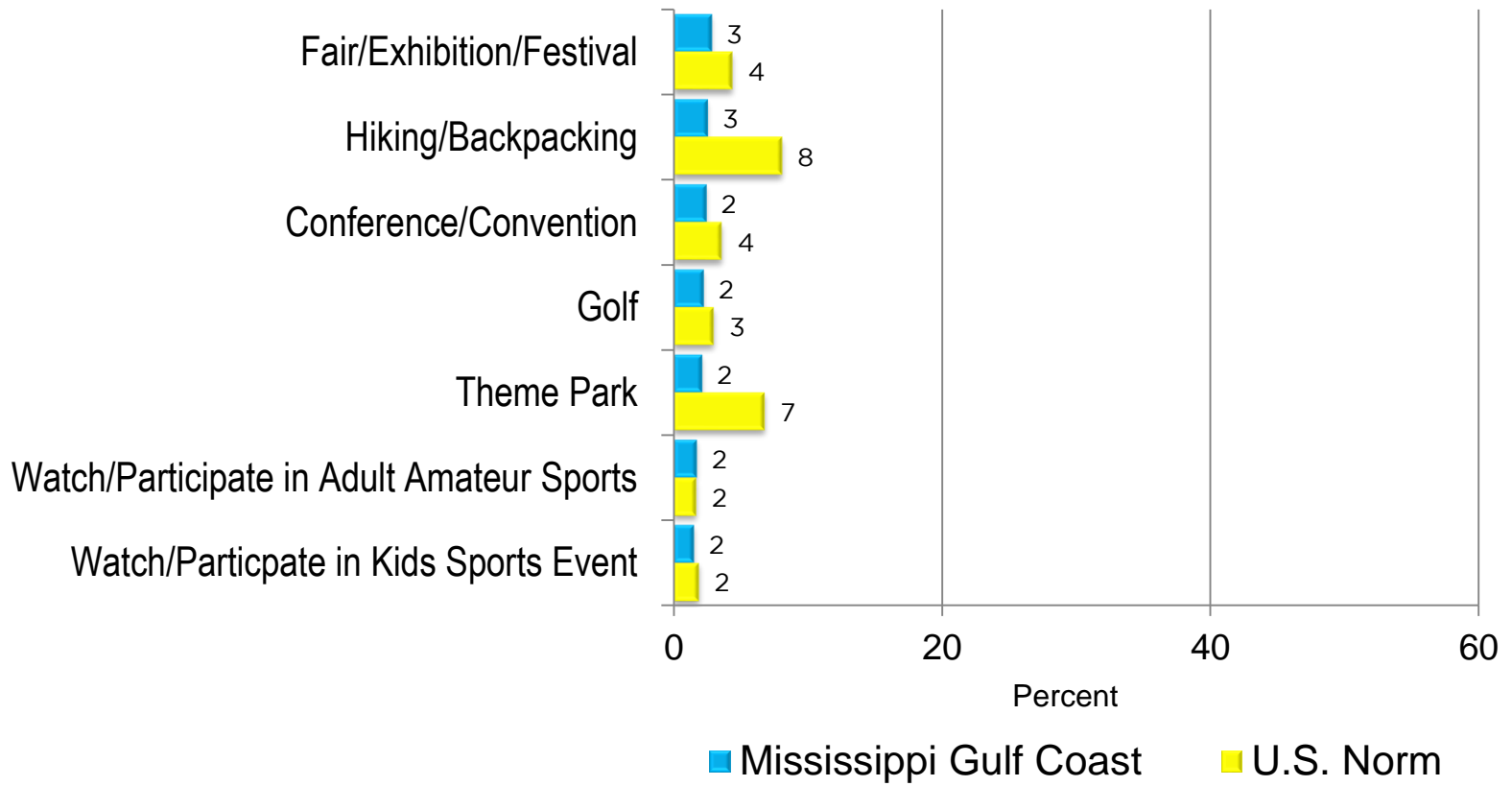


Activities and Experiences (Cont'd)

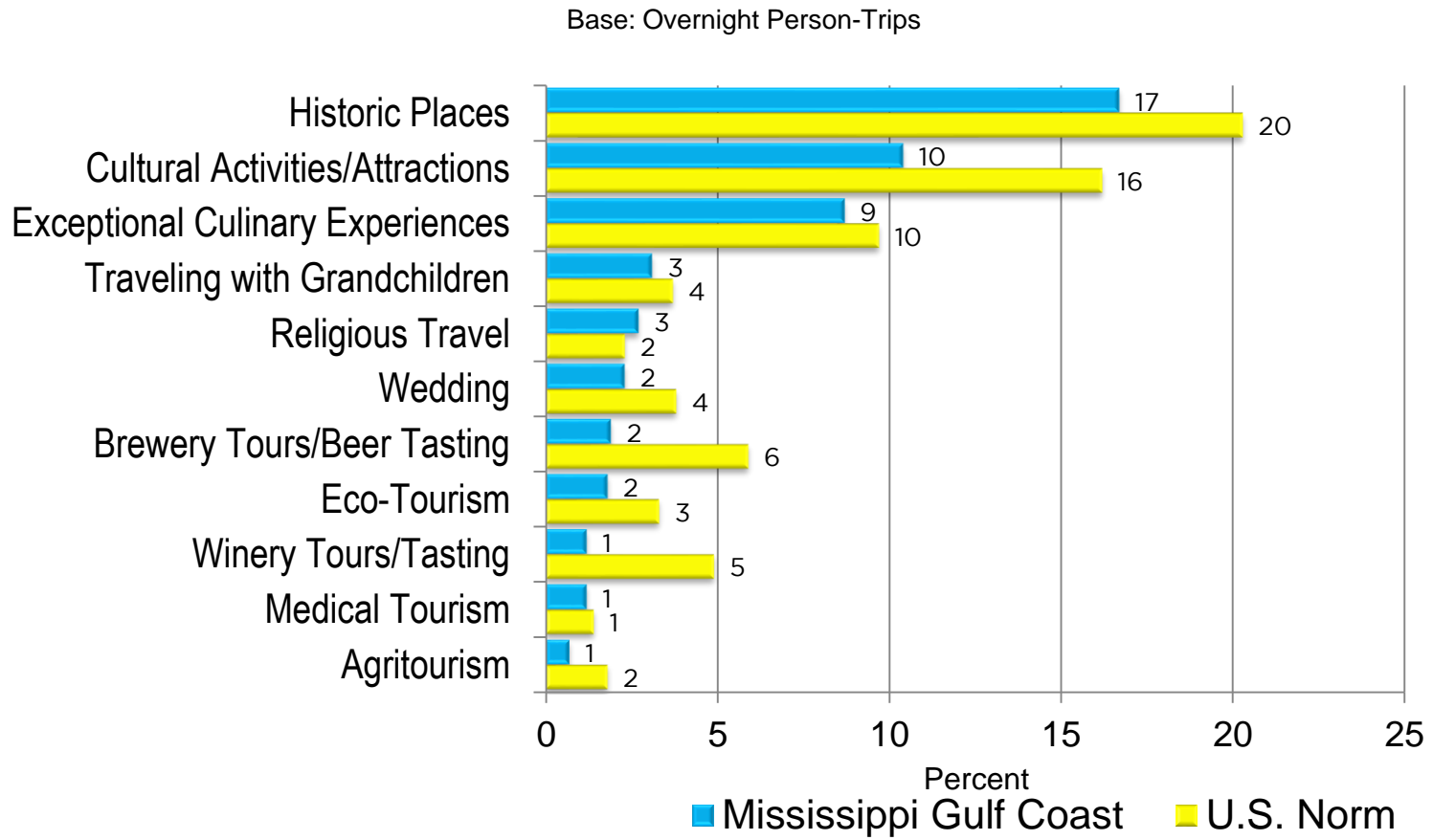


Activities and Experiences (Cont'd)

Base: Overnight Person-Trips

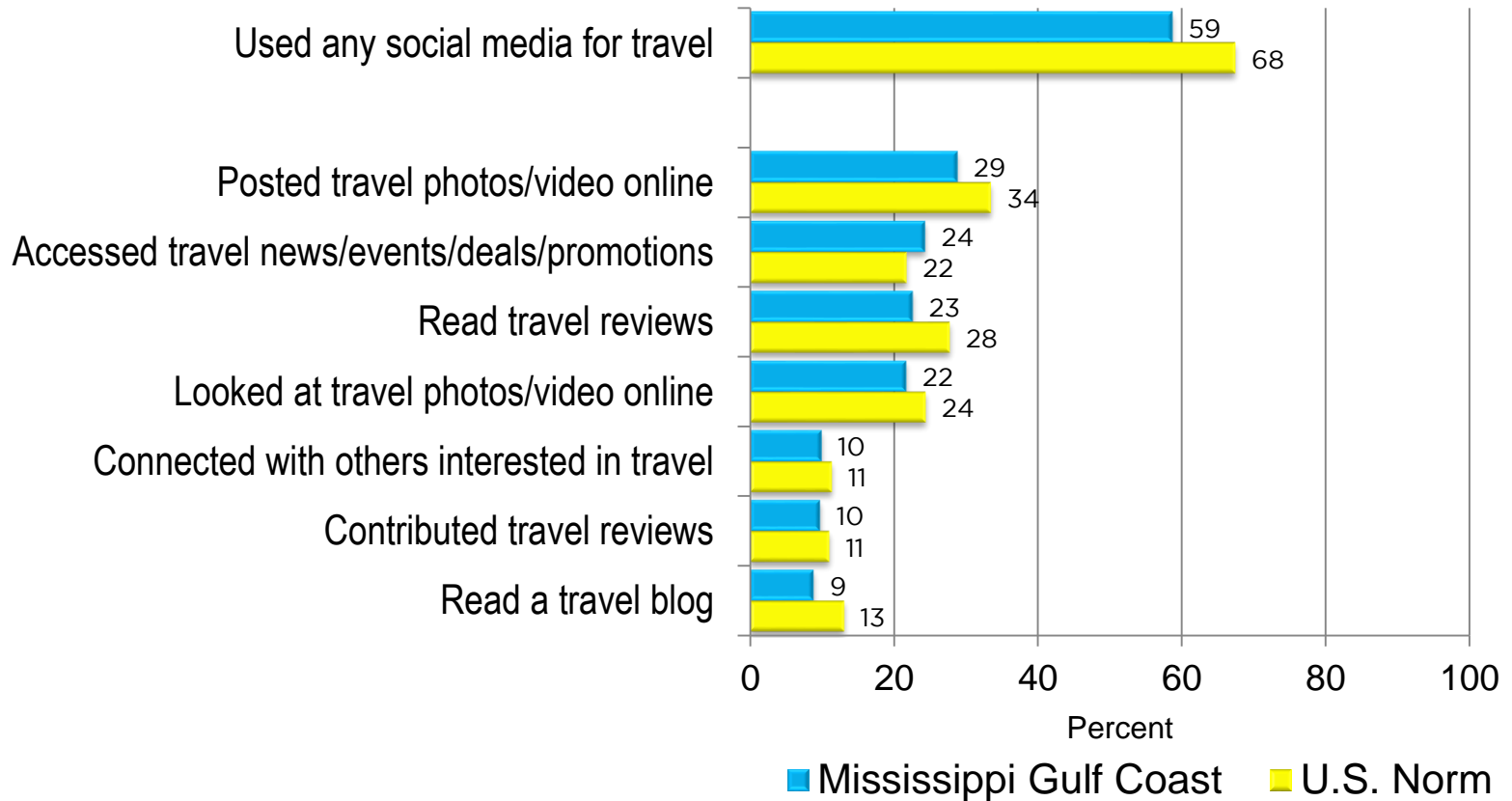


Activities of Special Interest



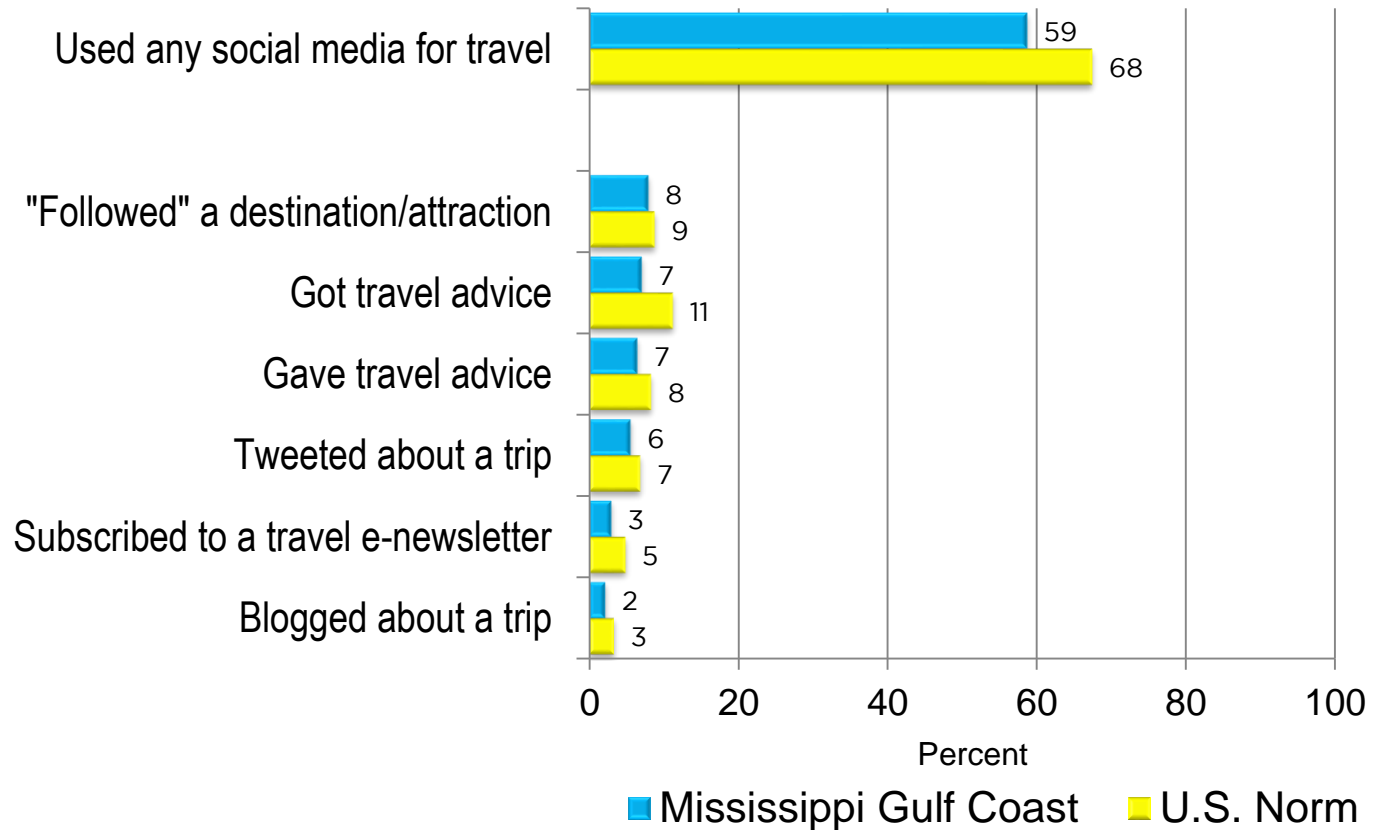
Online Social Media Use by Travelers

Base: Overnight Person-Trips



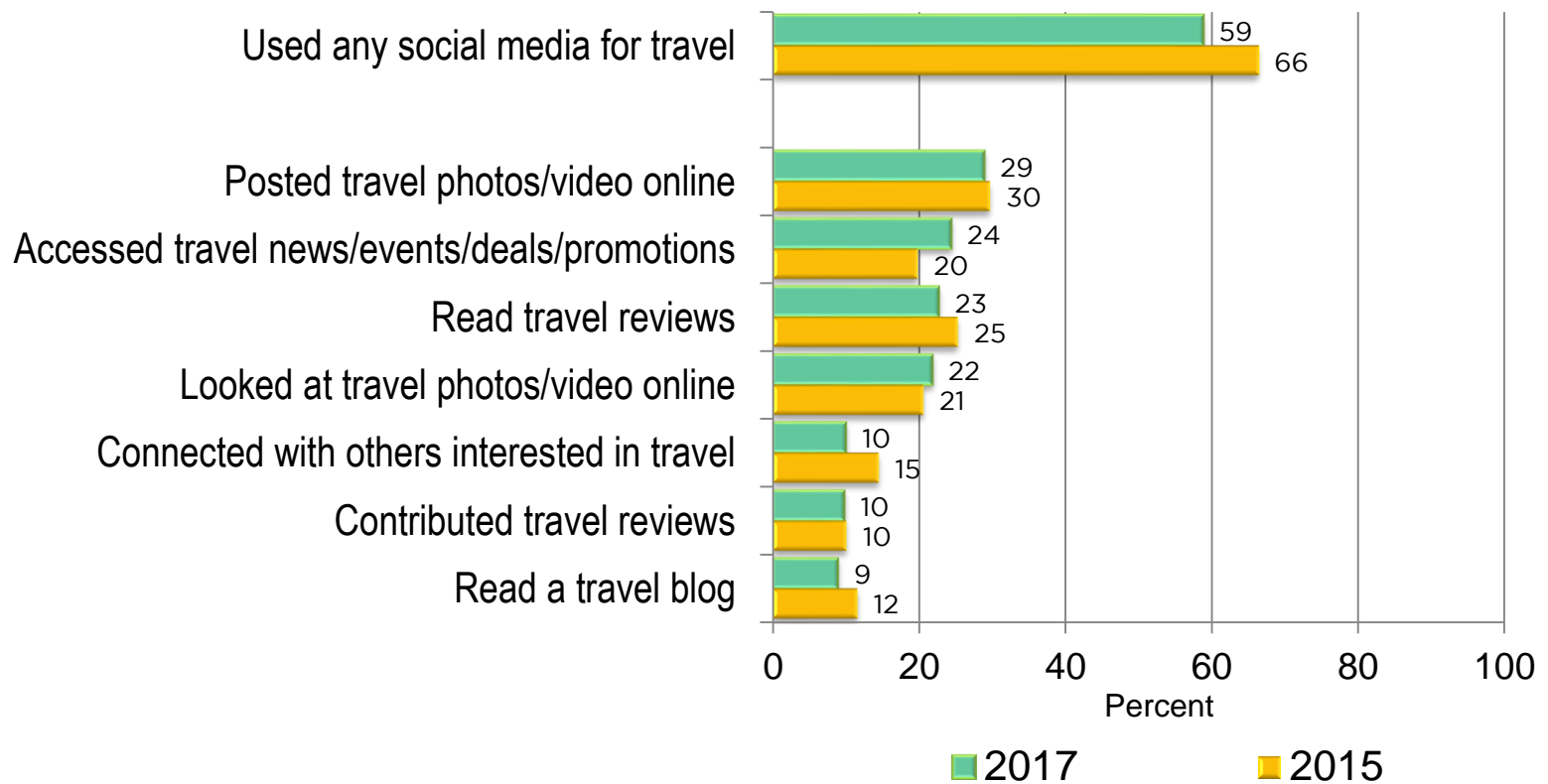
Online Social Media Use by Travelers (Cont'd)

Base: Overnight Person-Trips



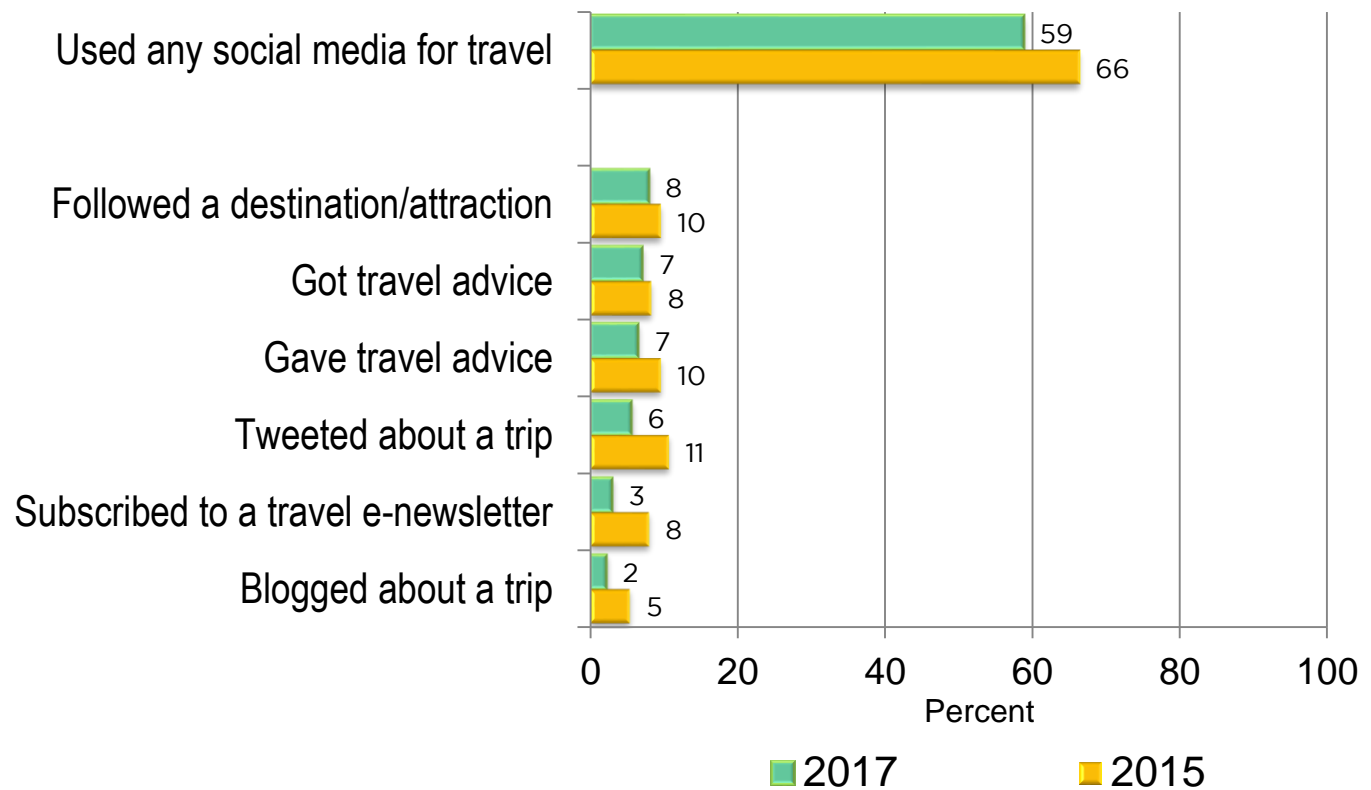
Online Social Media Use by Travelers – 2017 vs. 2015

Base: Overnight Person-Trips



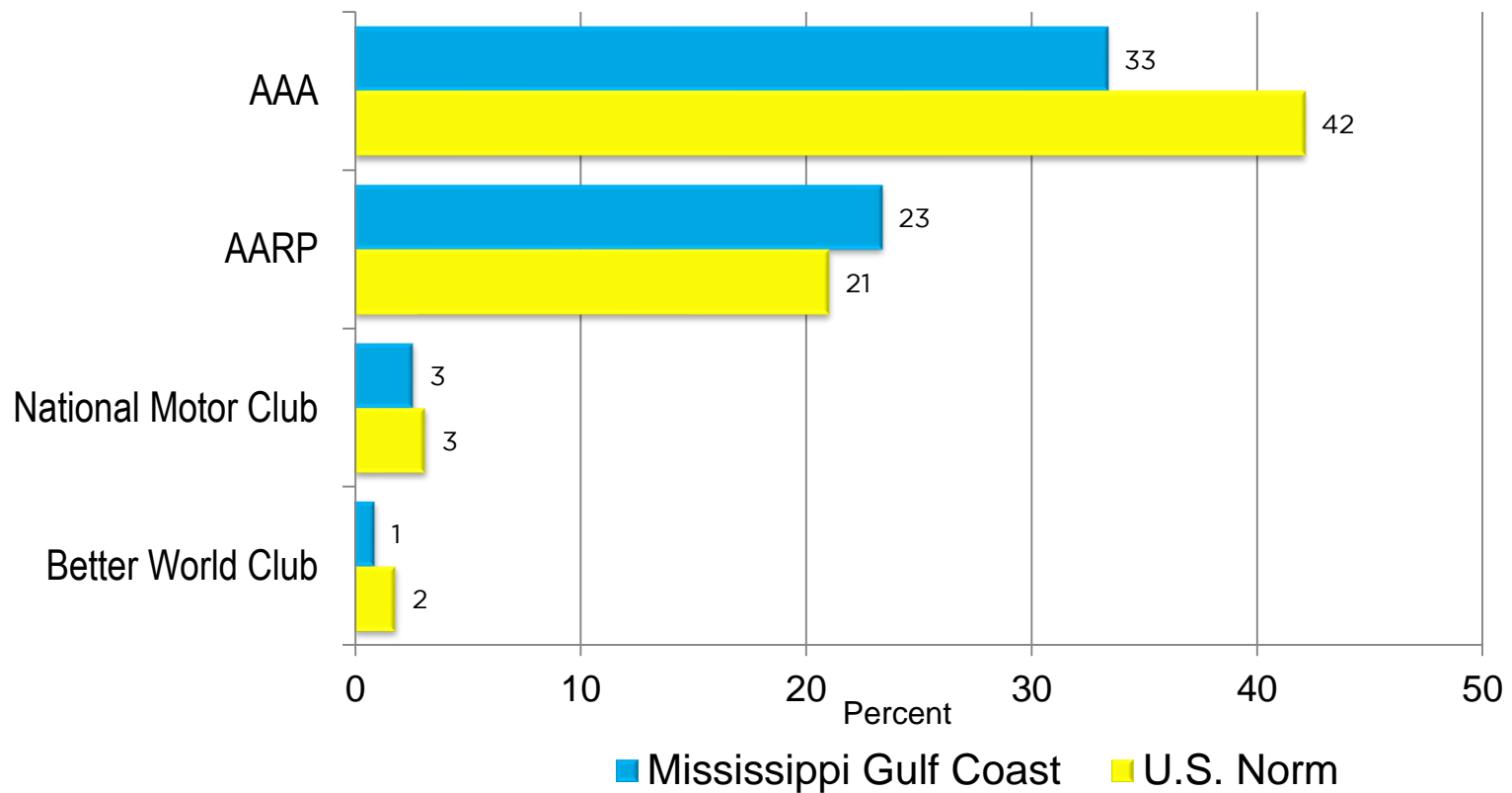
Online Social Media Use by Travelers – 2017 vs. 2015 (Cont'd)

Base: Overnight Person-Trips



Organization Membership

Base: Overnight Person-Trips

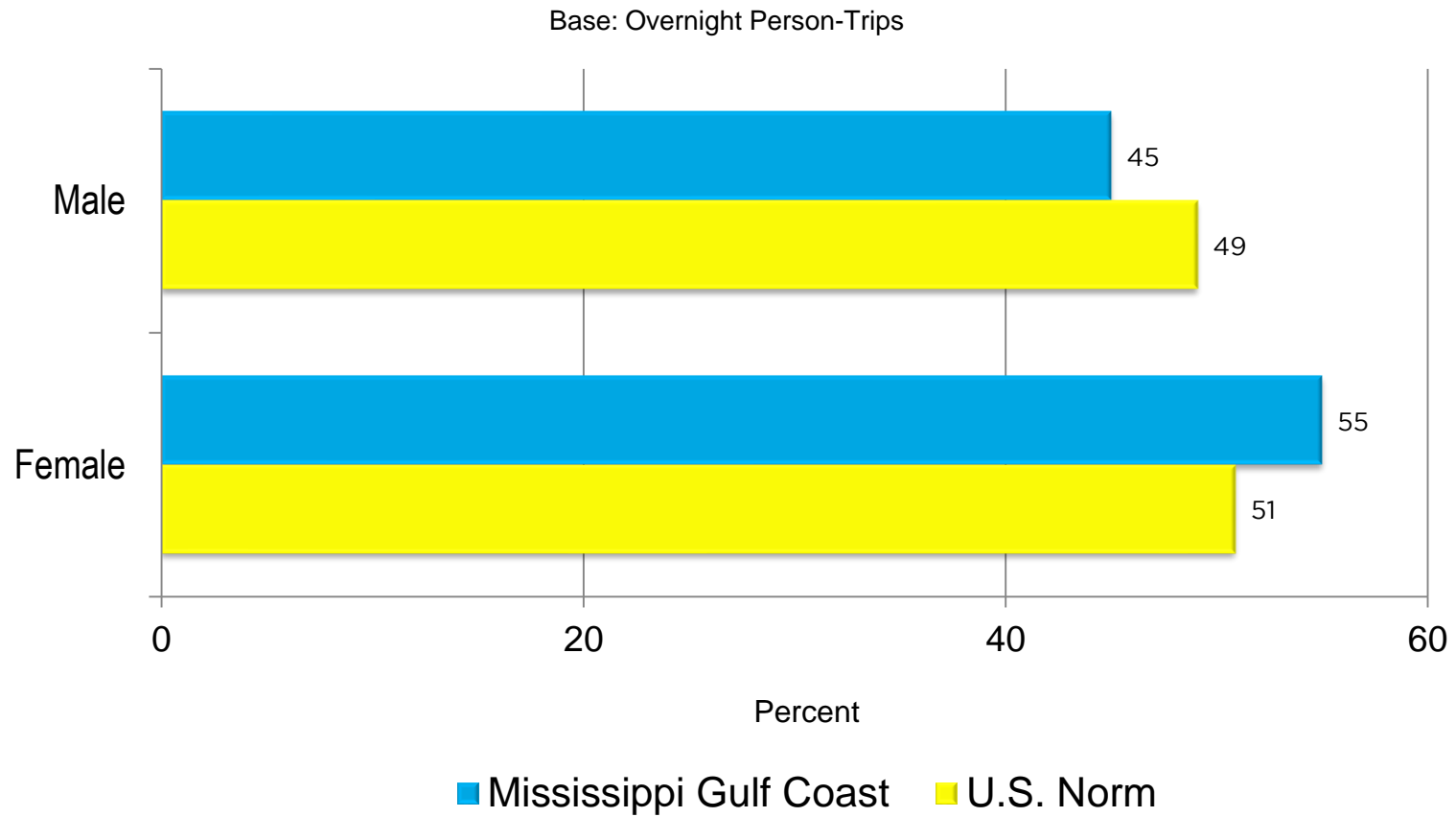




Demographic Profile of Overnight Visitors

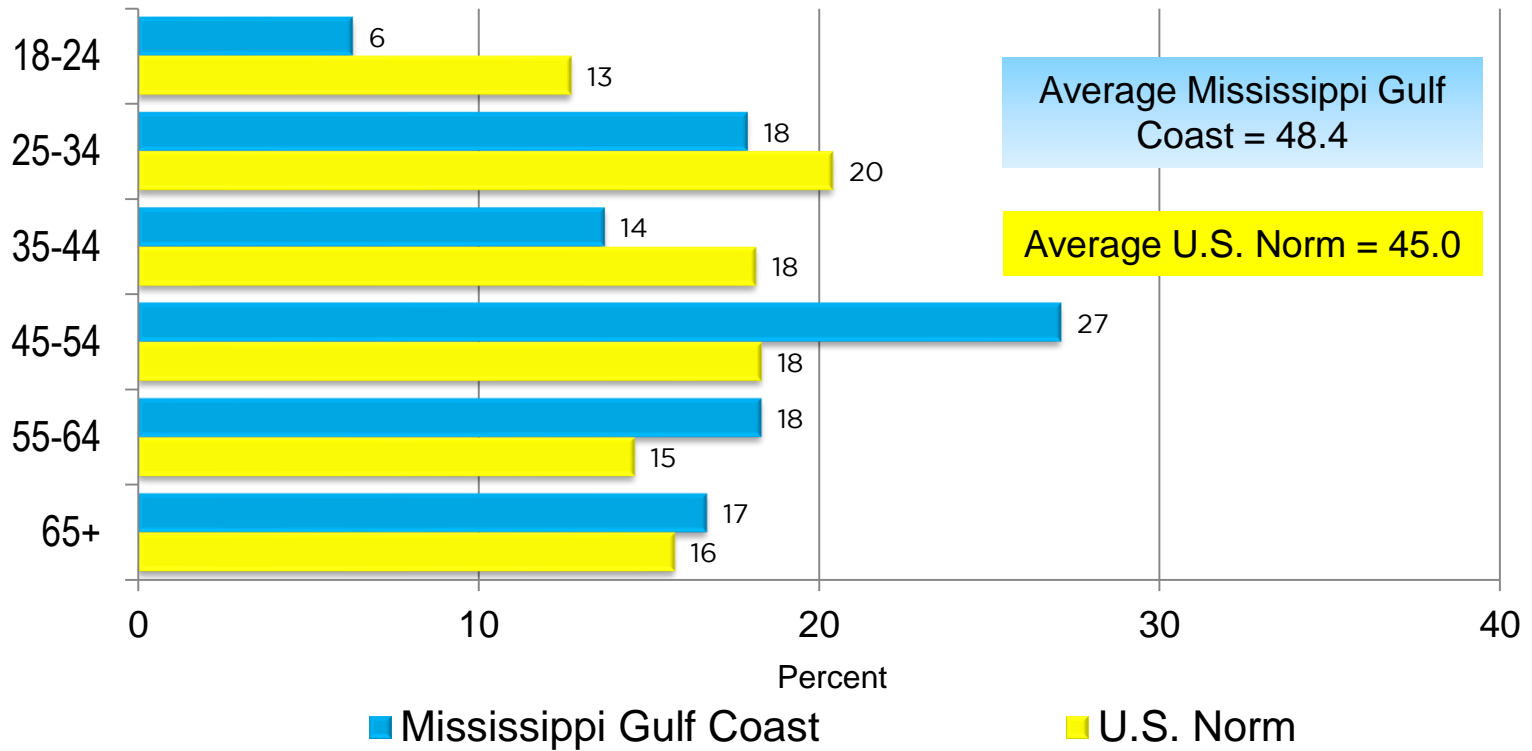


Gender

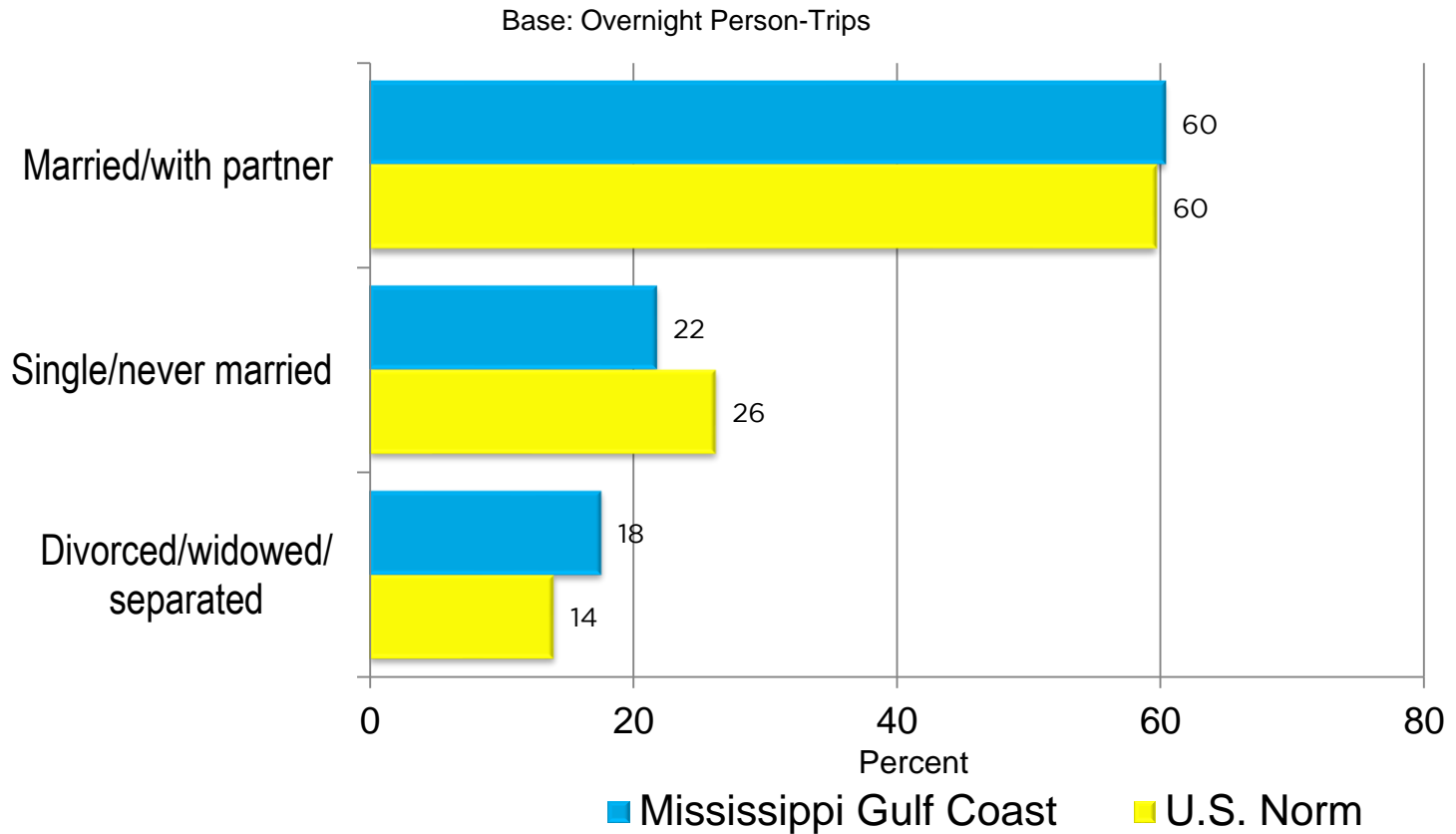


Age

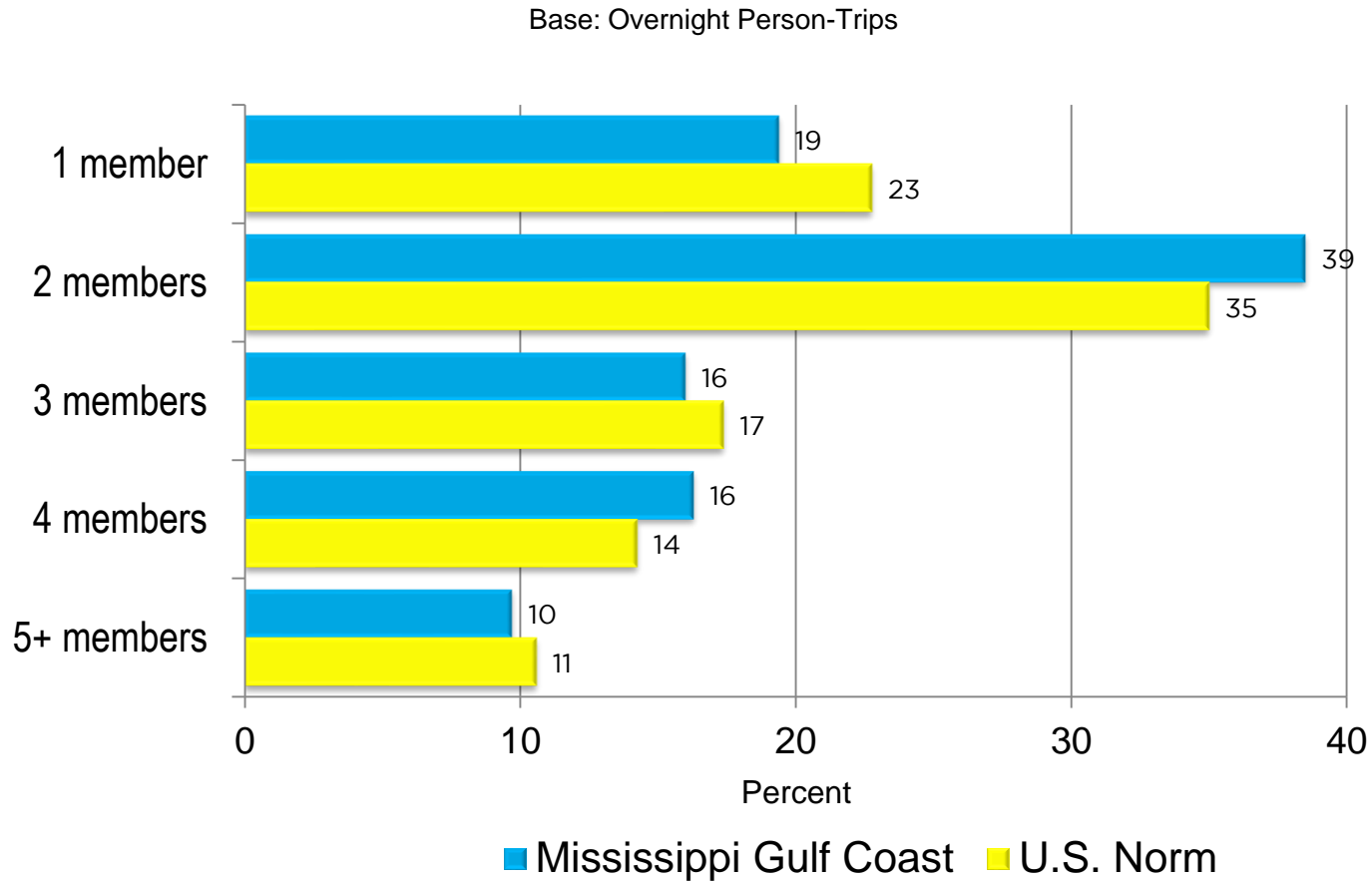
Base: Overnight Person-Trips



Marital Status

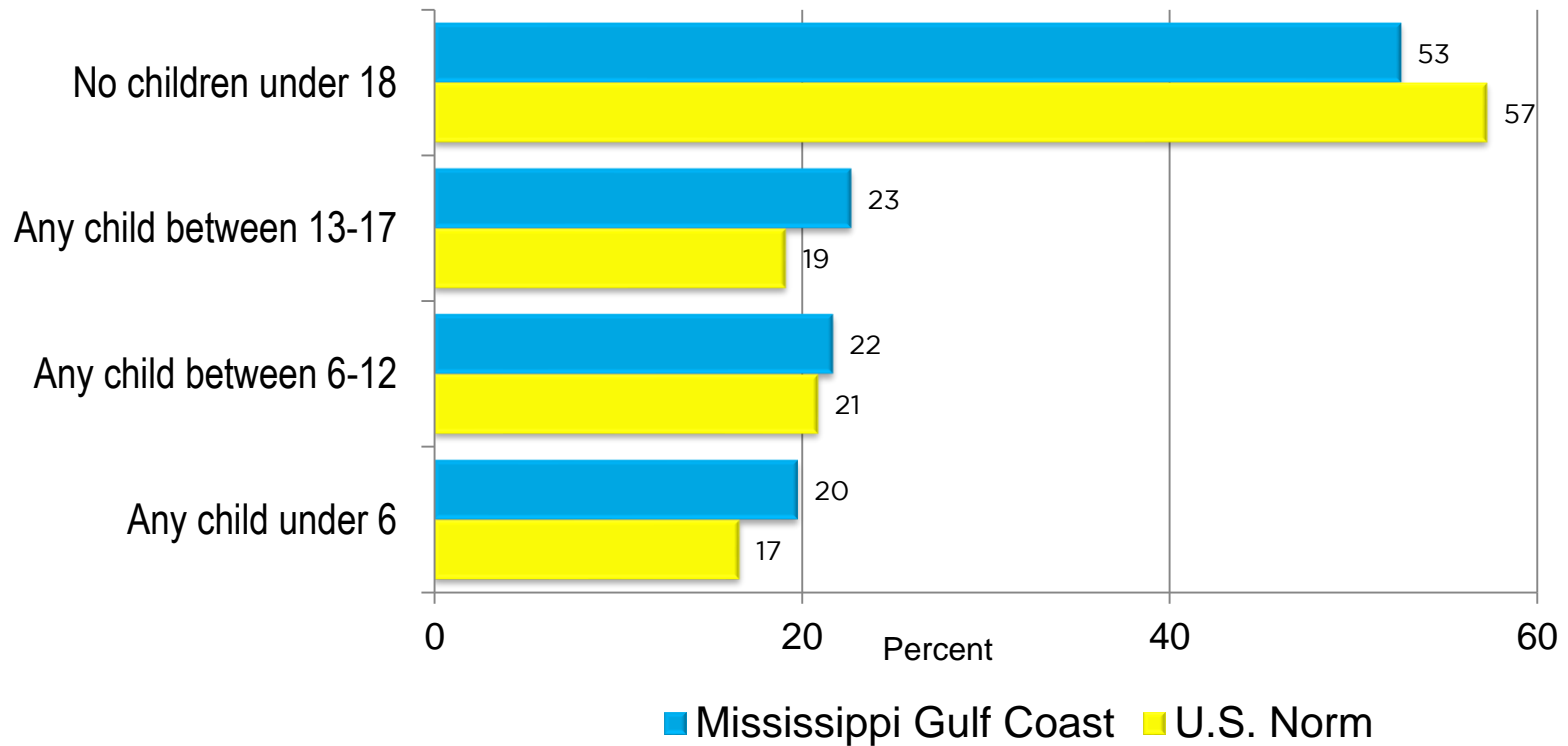


Household Size



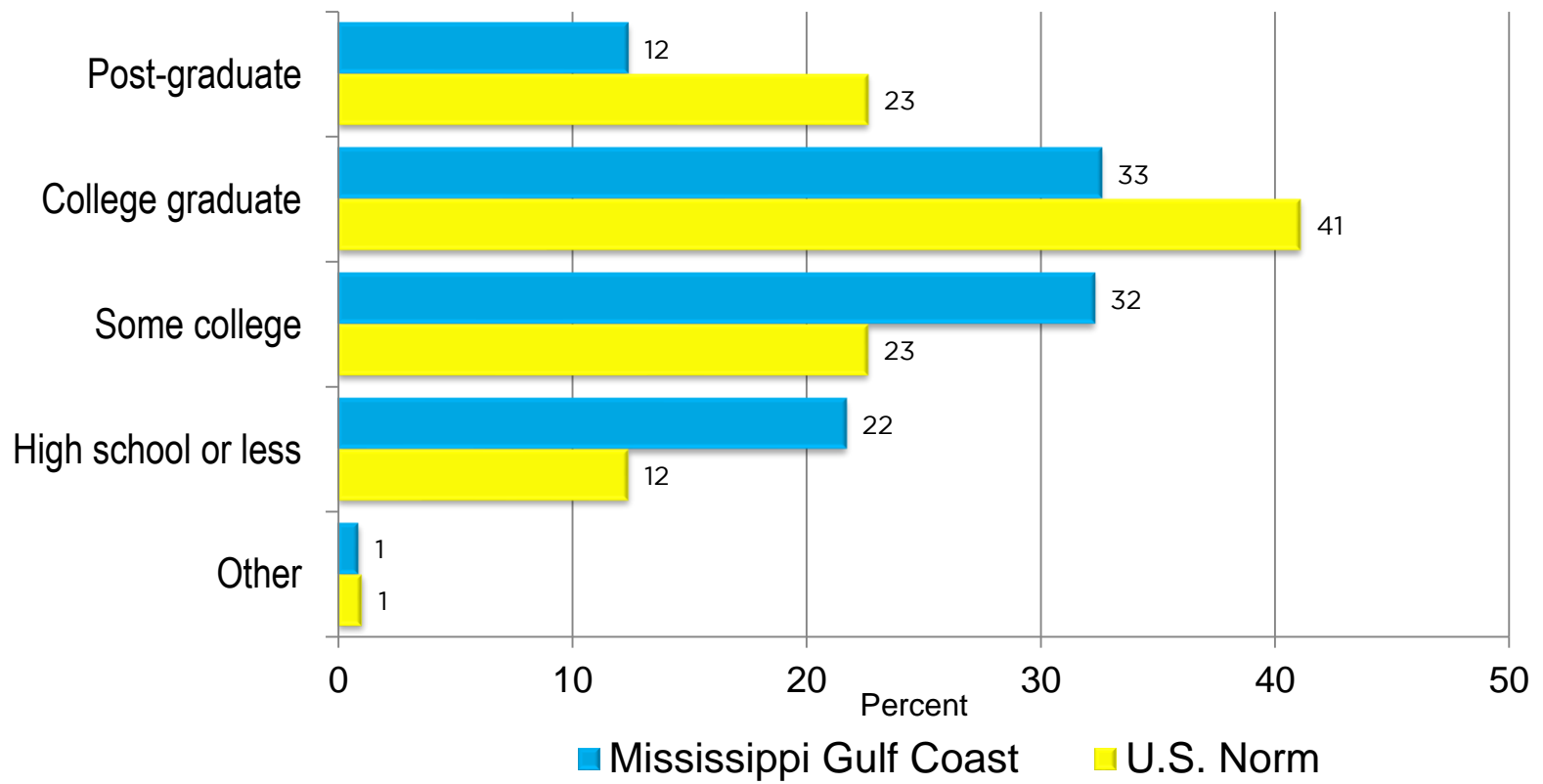
Children in Household

Base: Overnight Person-Trips



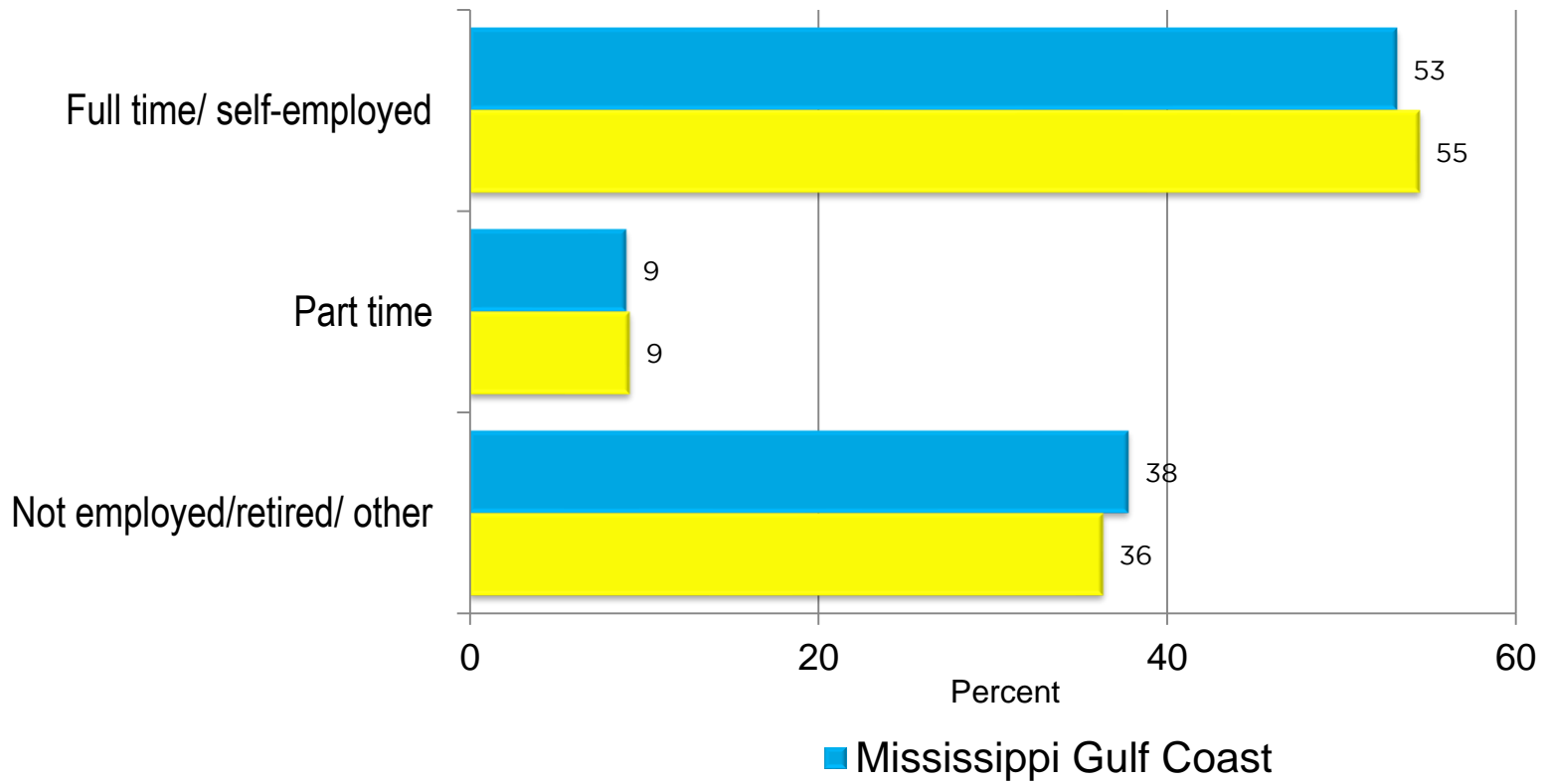
Education

Base: Overnight Person-Trips



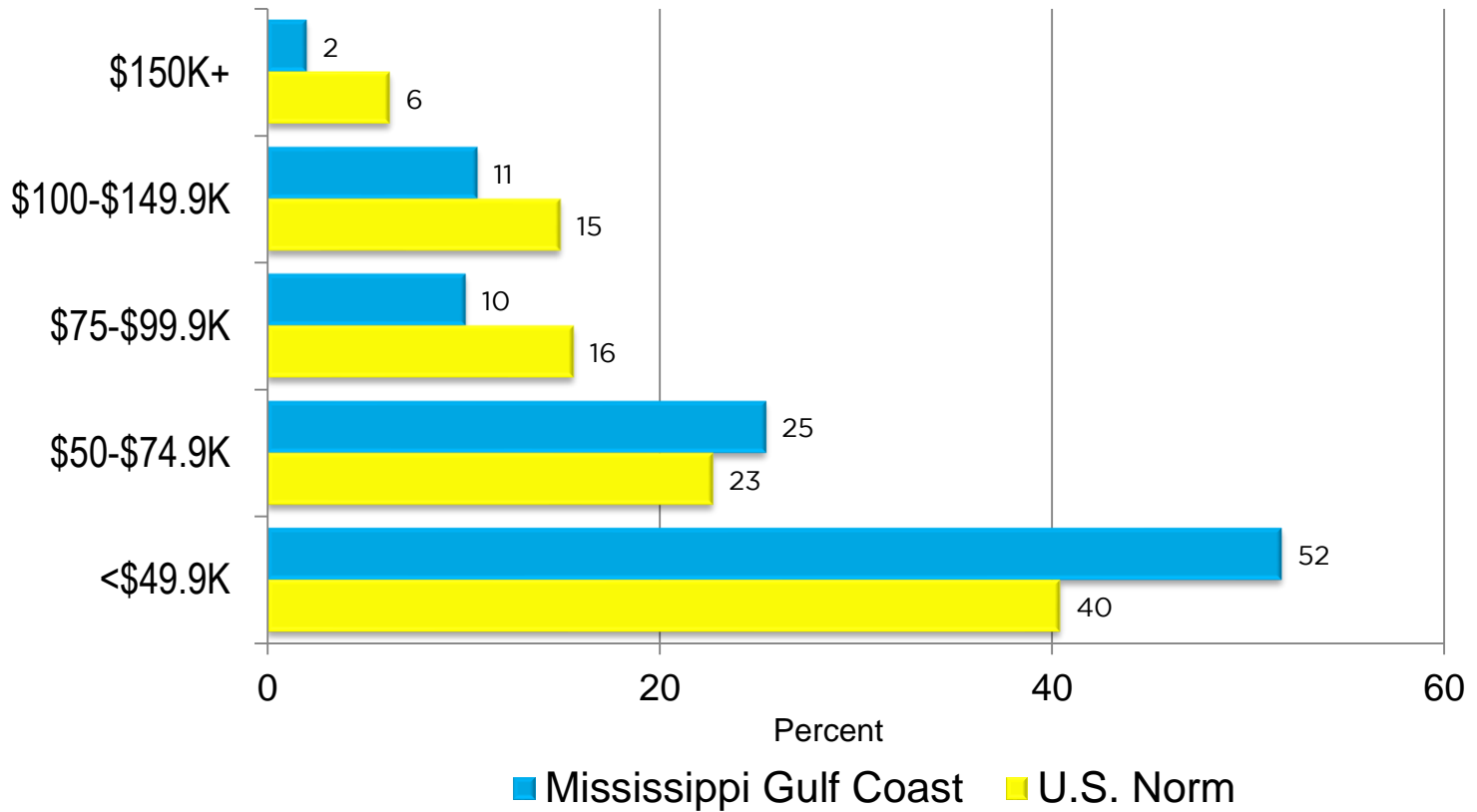
Employment

Base: Overnight Person-Trips

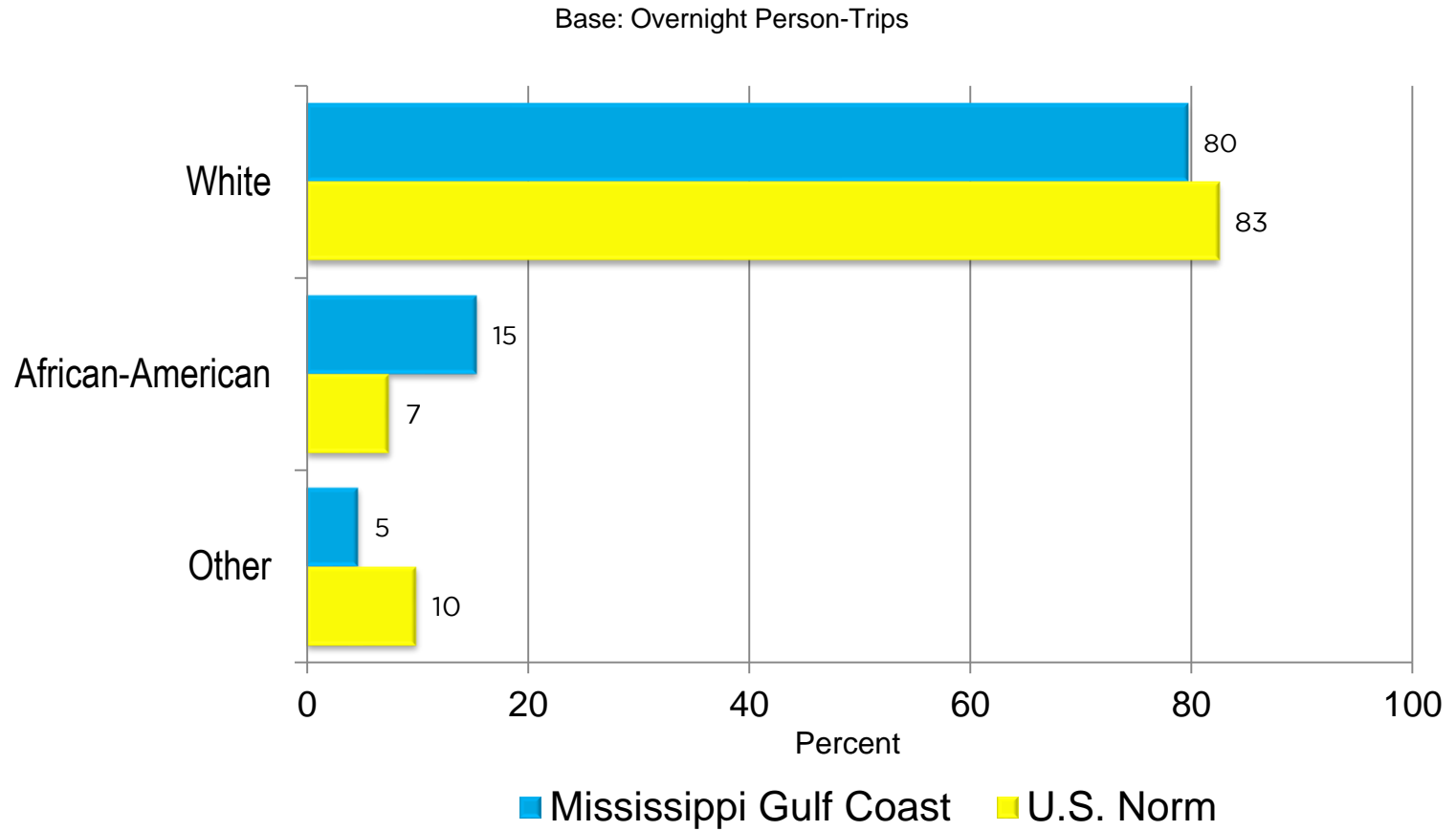


Household Income

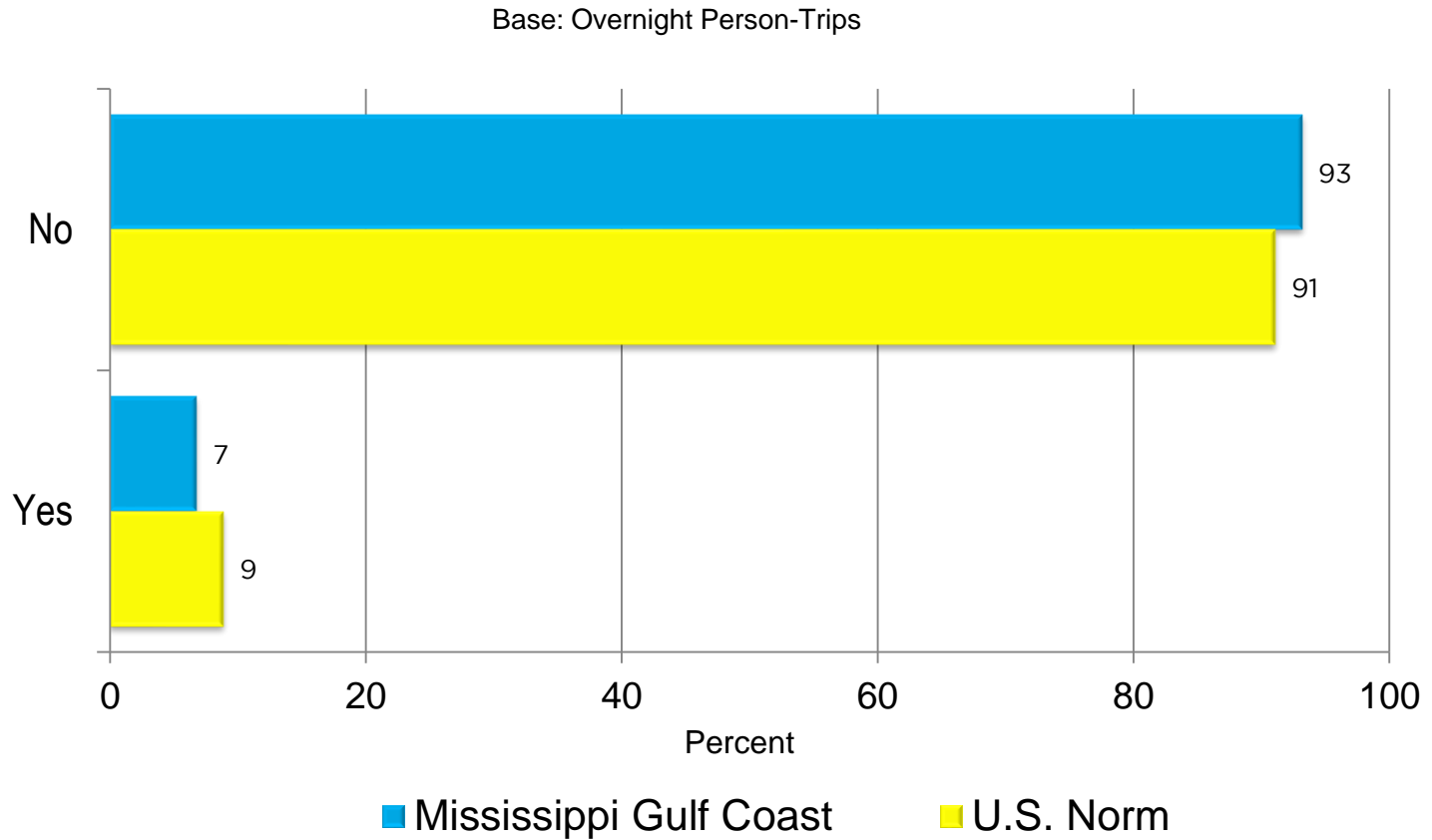
Base: Overnight Person-Trips



Race



Hispanic Background





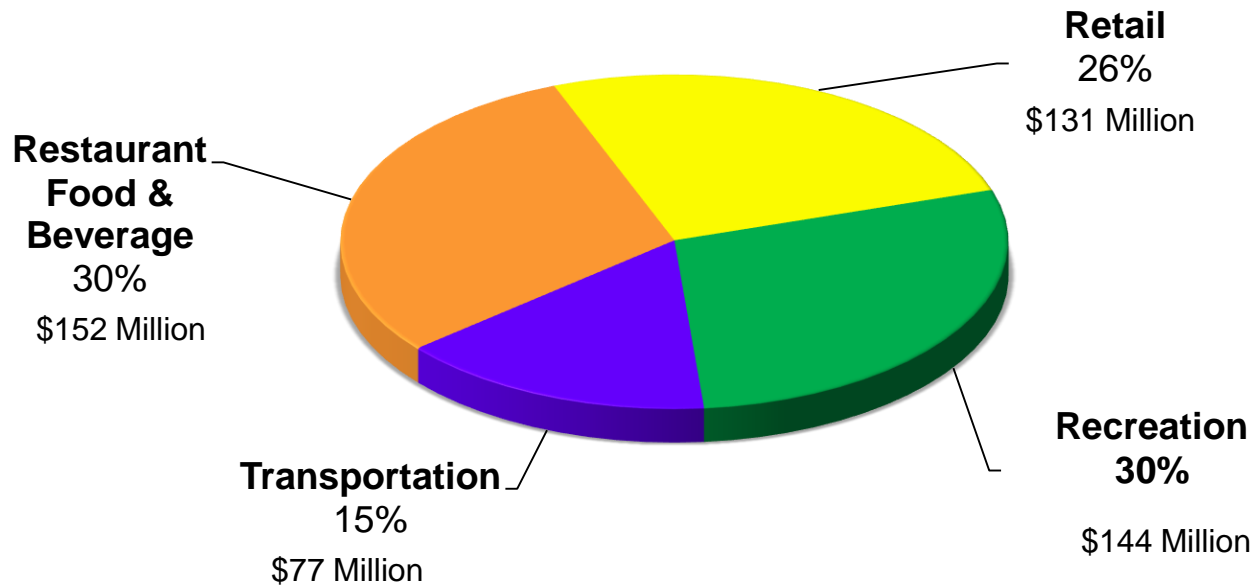
Day Trip Expenditures



Total Mississippi Gulf Coast Domestic Day Trip Spending — by Sector

Total Spending = \$504 Million

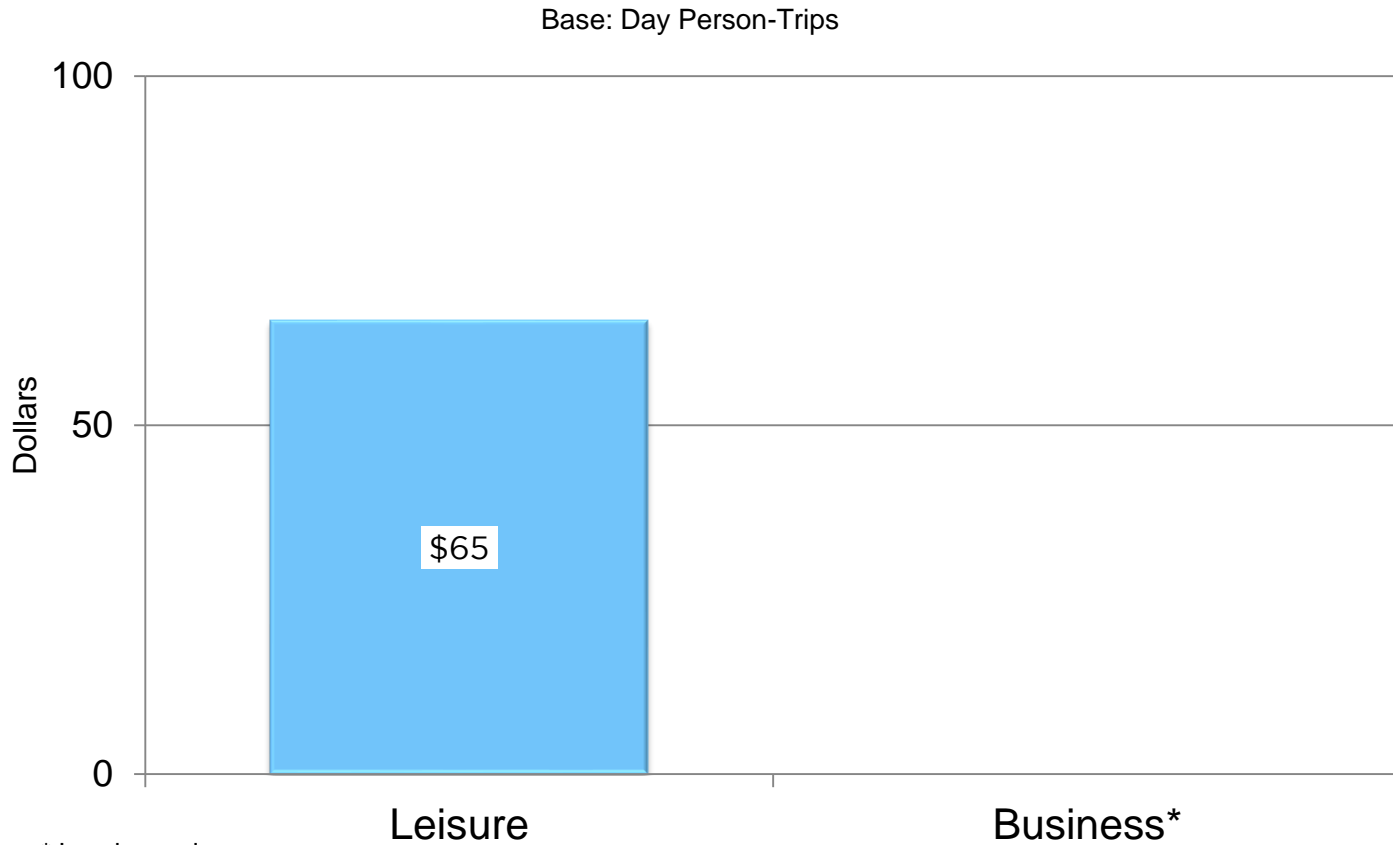
+10.4% vs. 2015



Average Per Person Expenditures on Day Trips — By Sector



Average Per Person Expenditures on Day Trips — by Trip Purpose



* Low base sizes

Average Per Party Expenditures on Day Trips — By Sector



Average Per Party Expenditures on Day Trip — by Trip Purpose



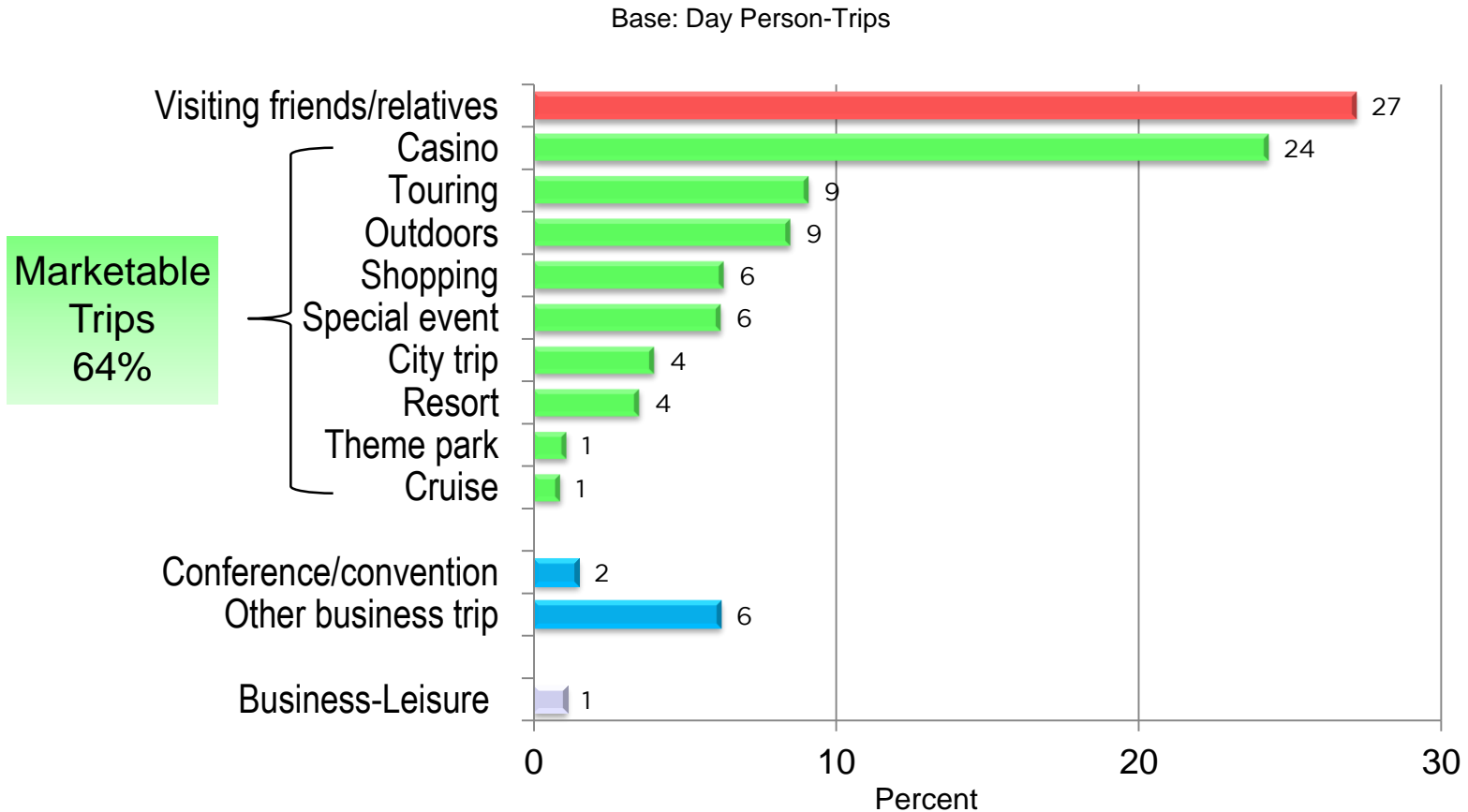
* Low base sizes



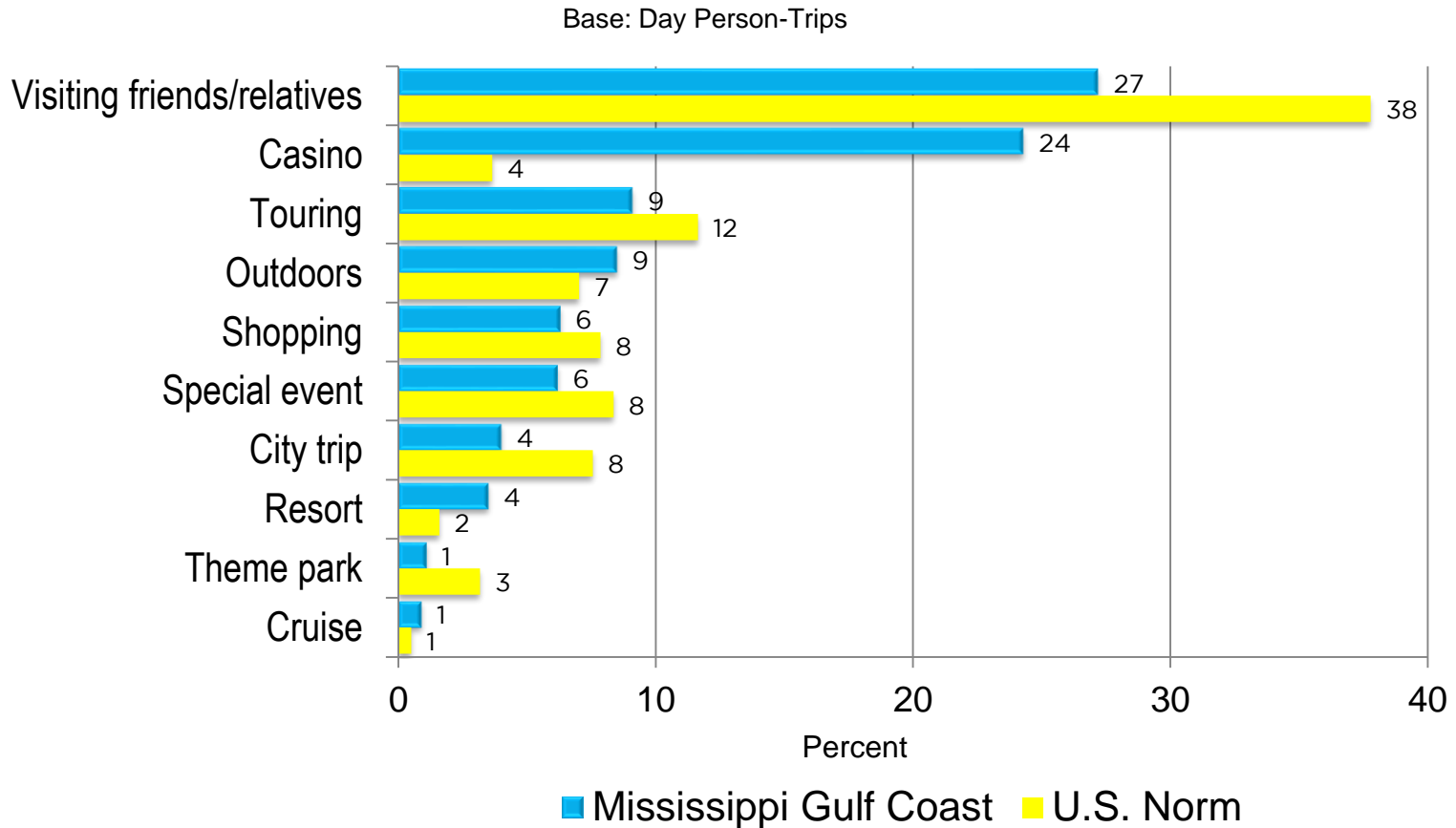
Day Trip Characteristics



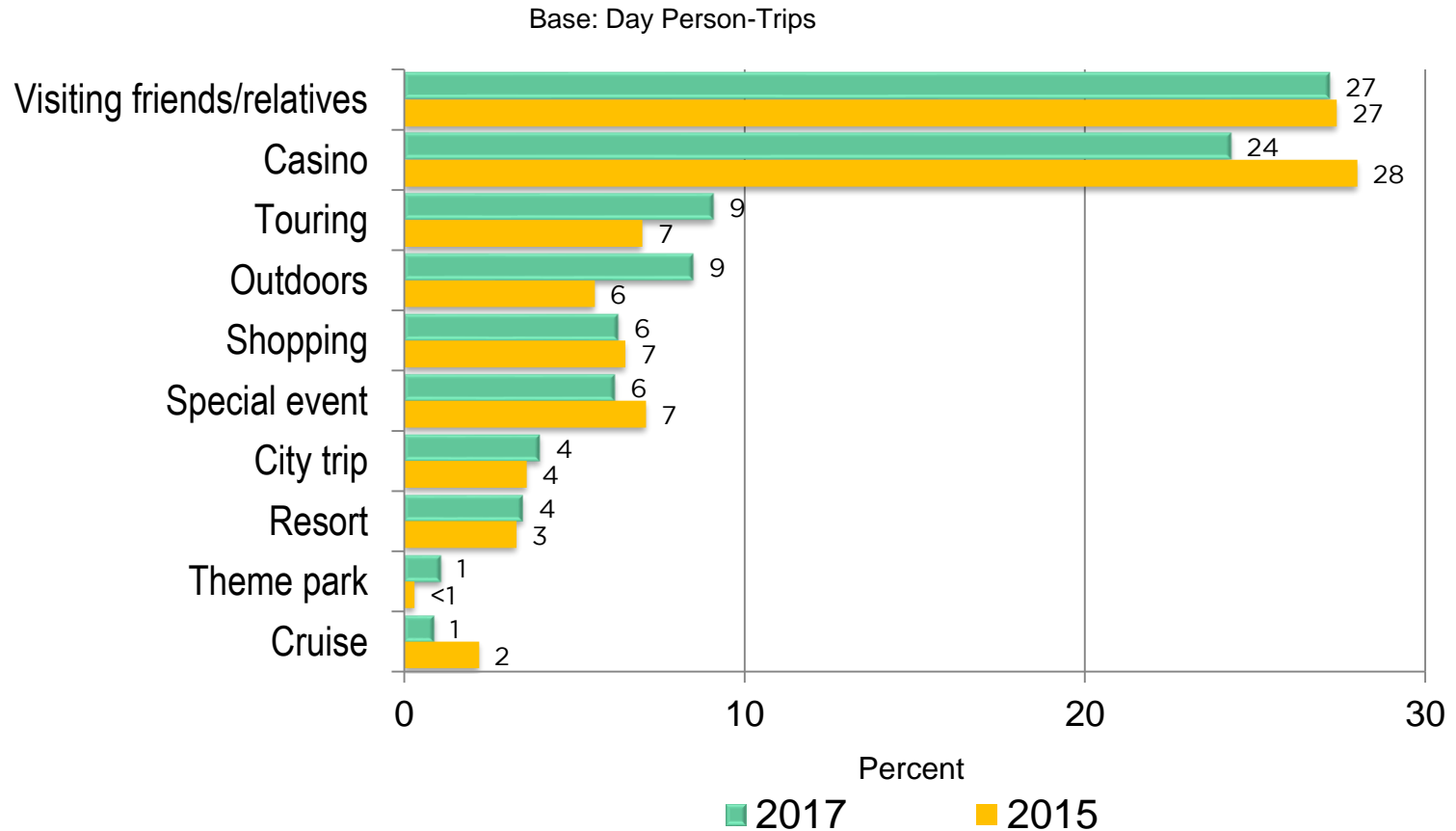
Main Purpose of Trip



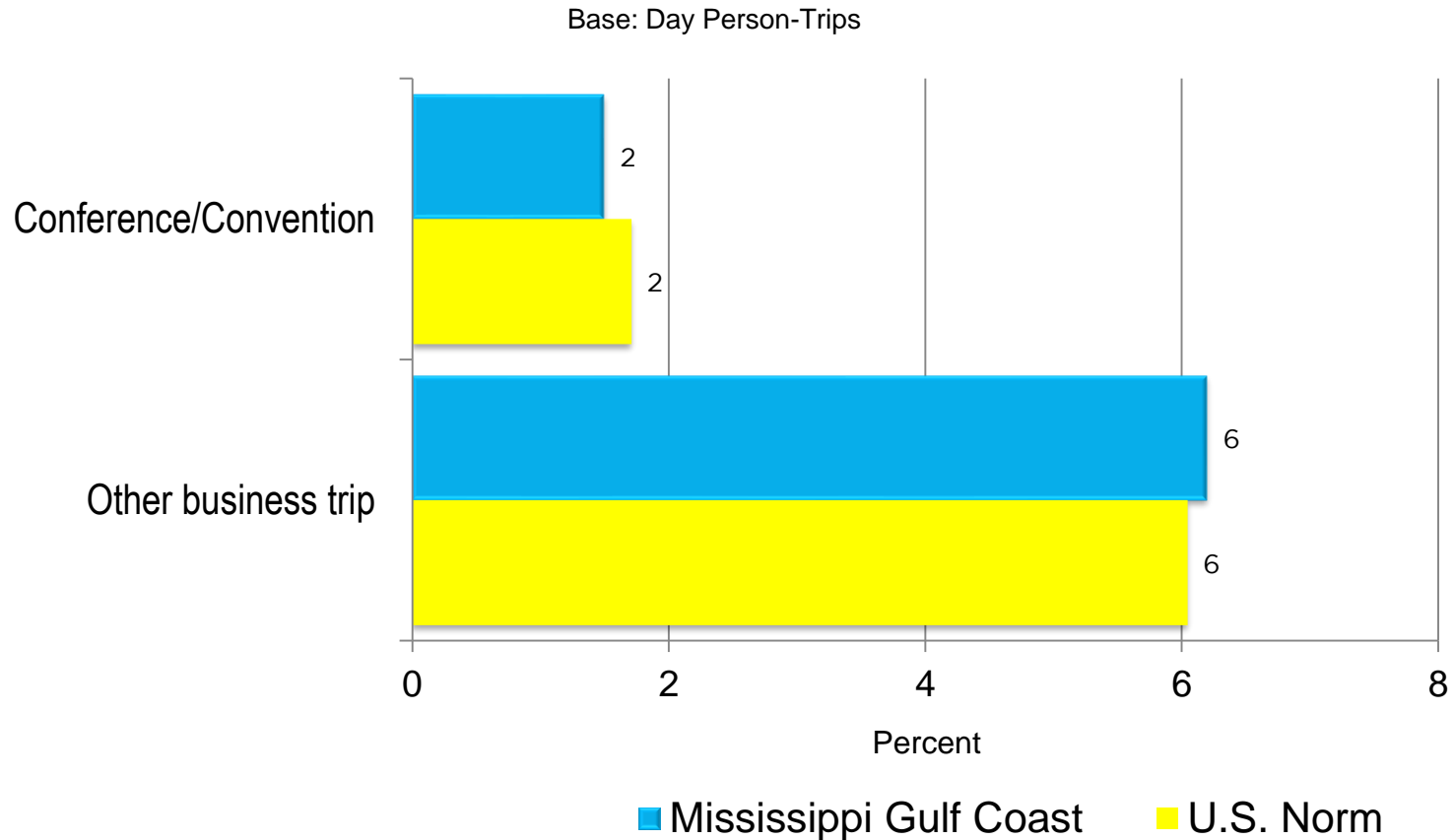
Main Purpose of Leisure Trip — Mississippi Gulf Coast vs. National Norm



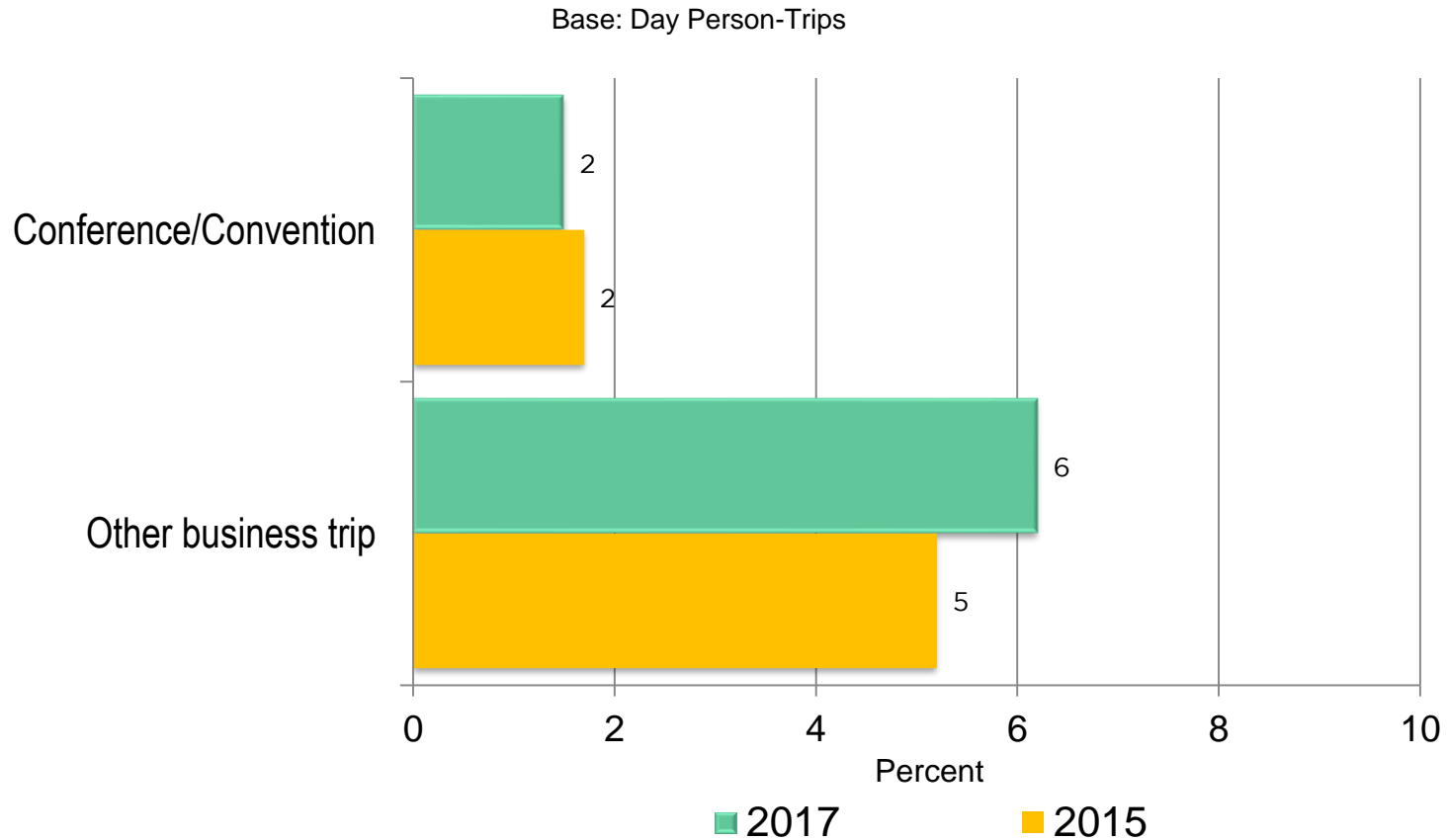
Main Purpose of Day Leisure Trip — 2017 vs. 2015



Main Purpose of Day Business Trip — Mississippi Gulf Coast vs. National Norm

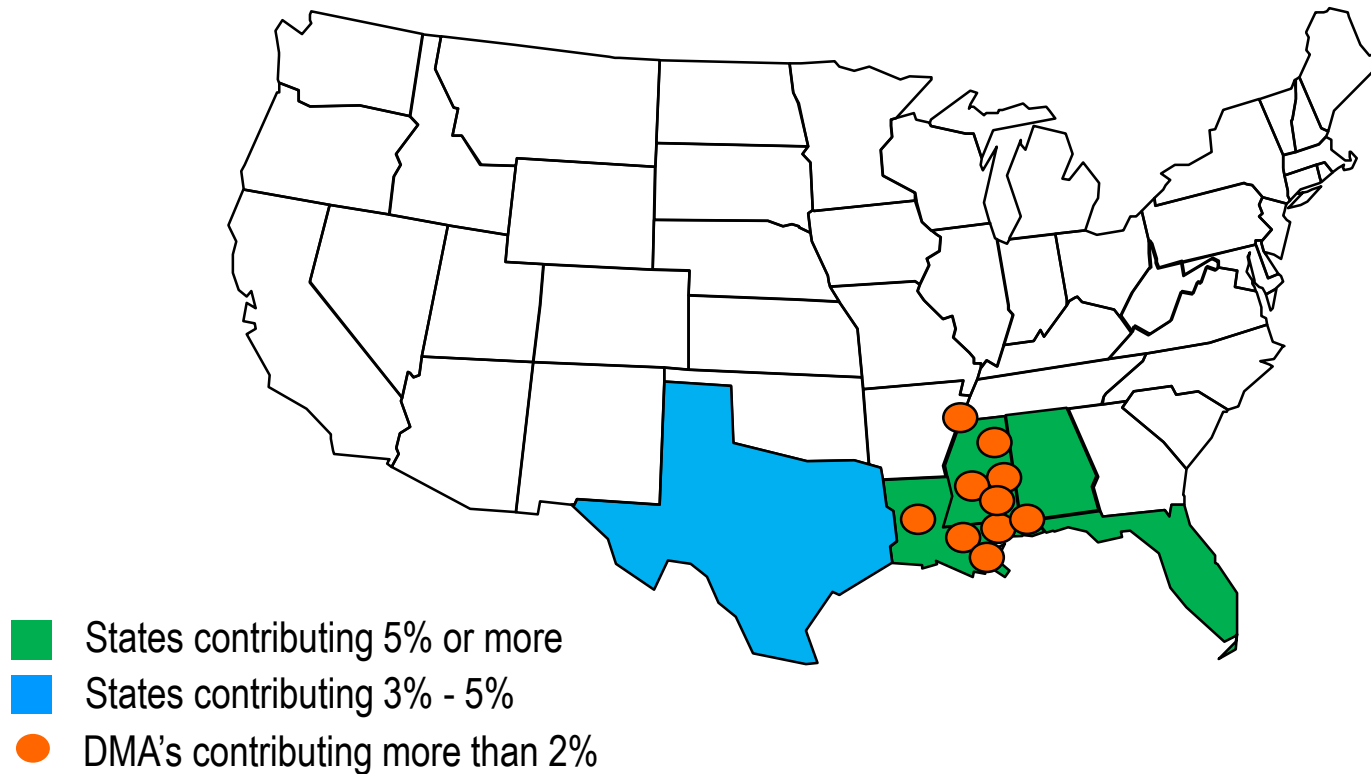


Main Purpose of Day Business Trip — 2017 vs. 2015

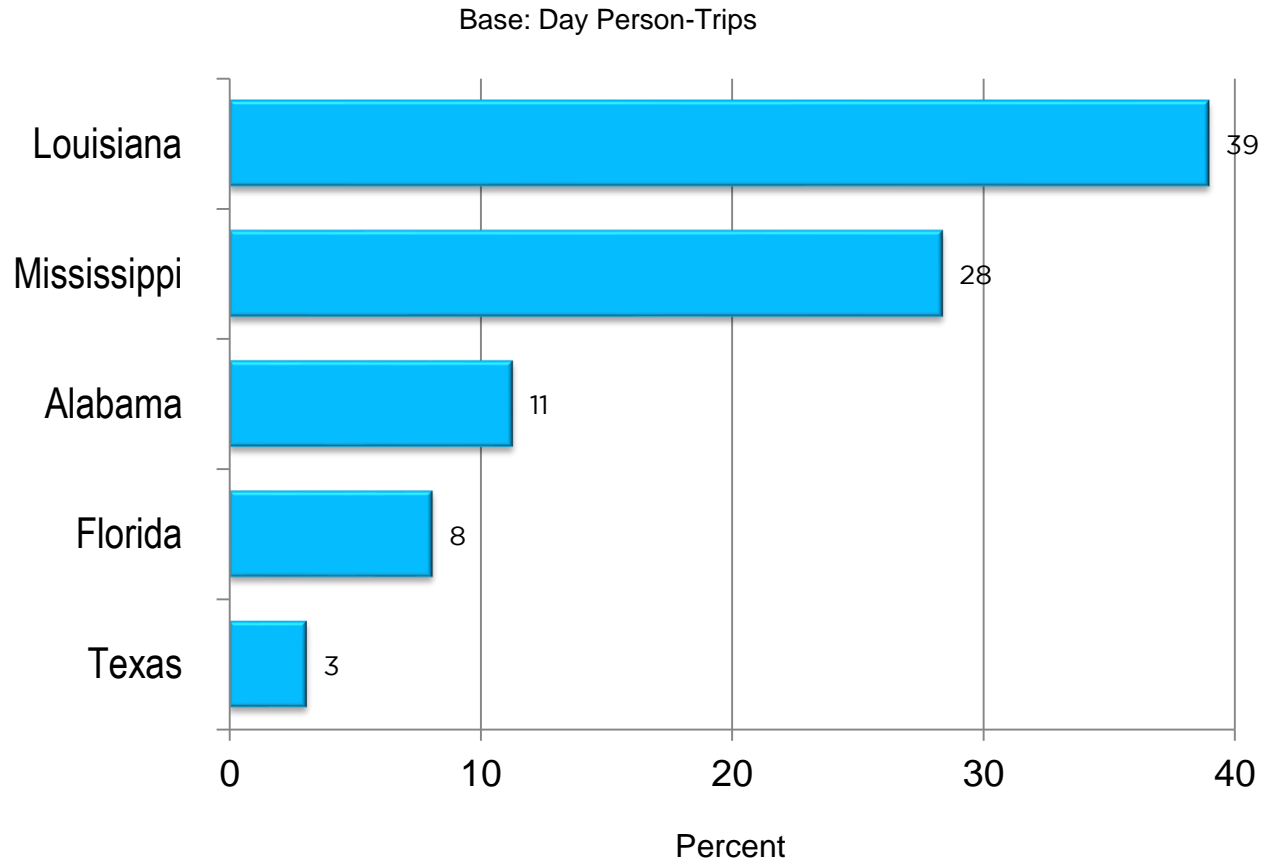


Sources of Business

Base: Day Person-Trips

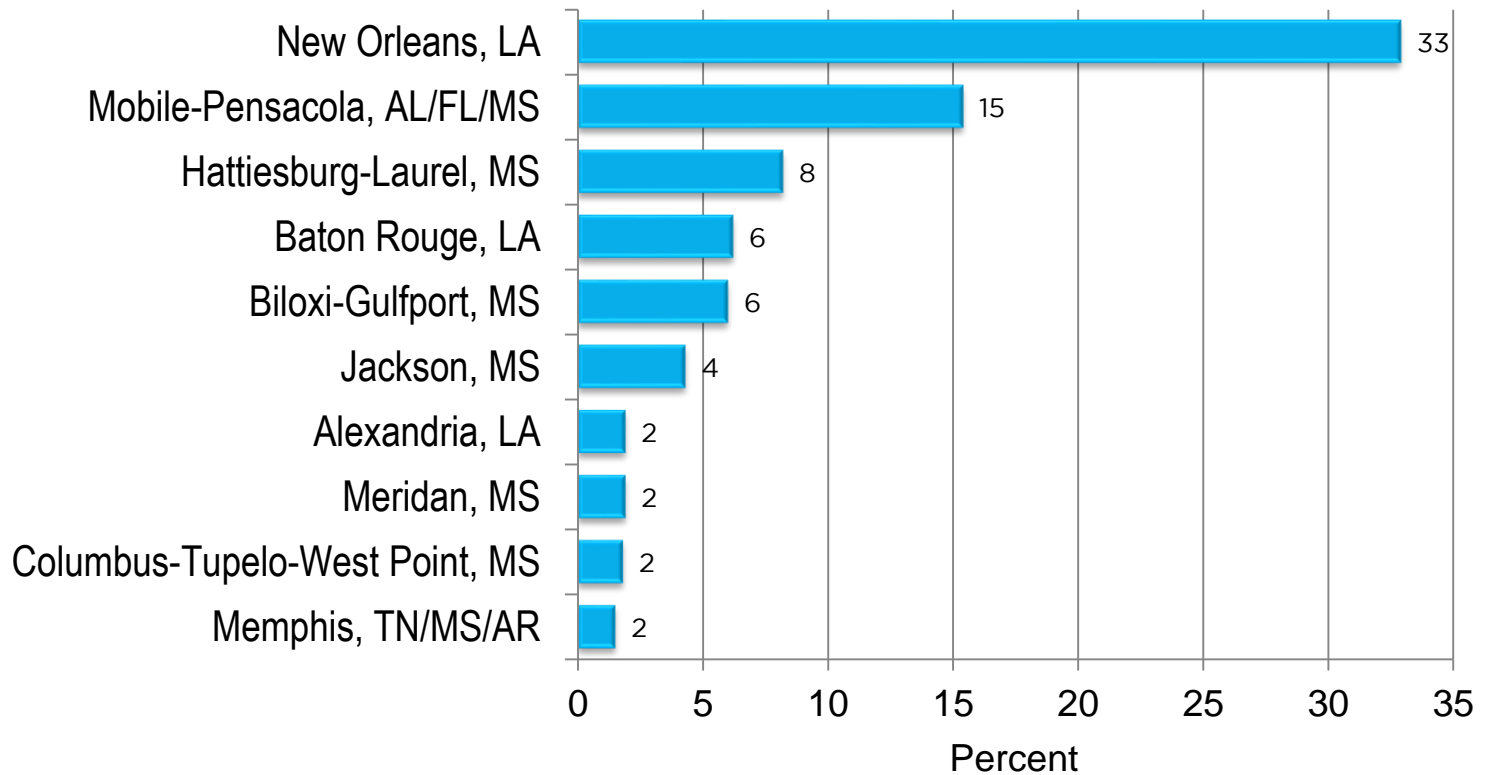


State Origin Of Trip

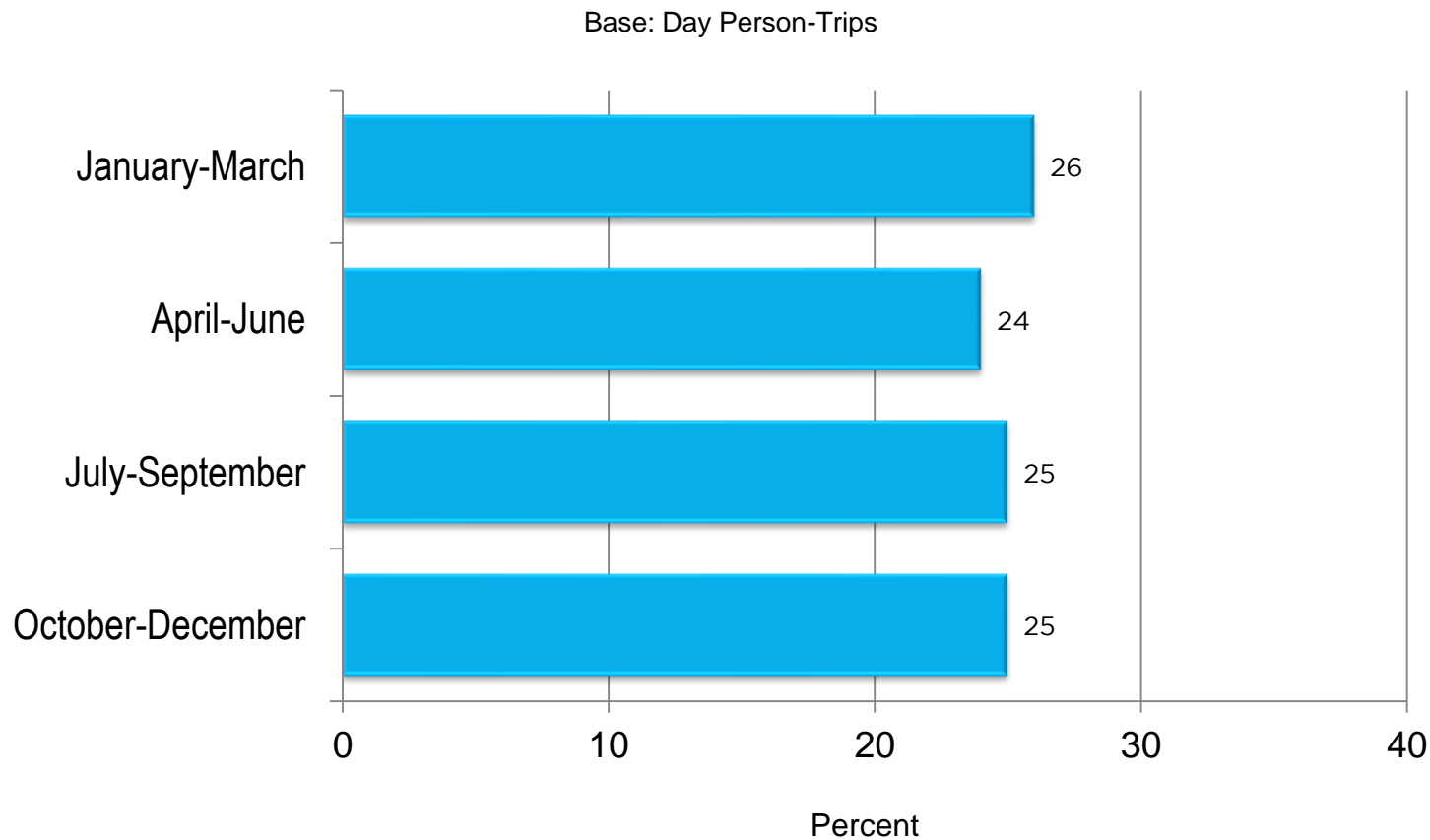


DMA Origin Of Trip

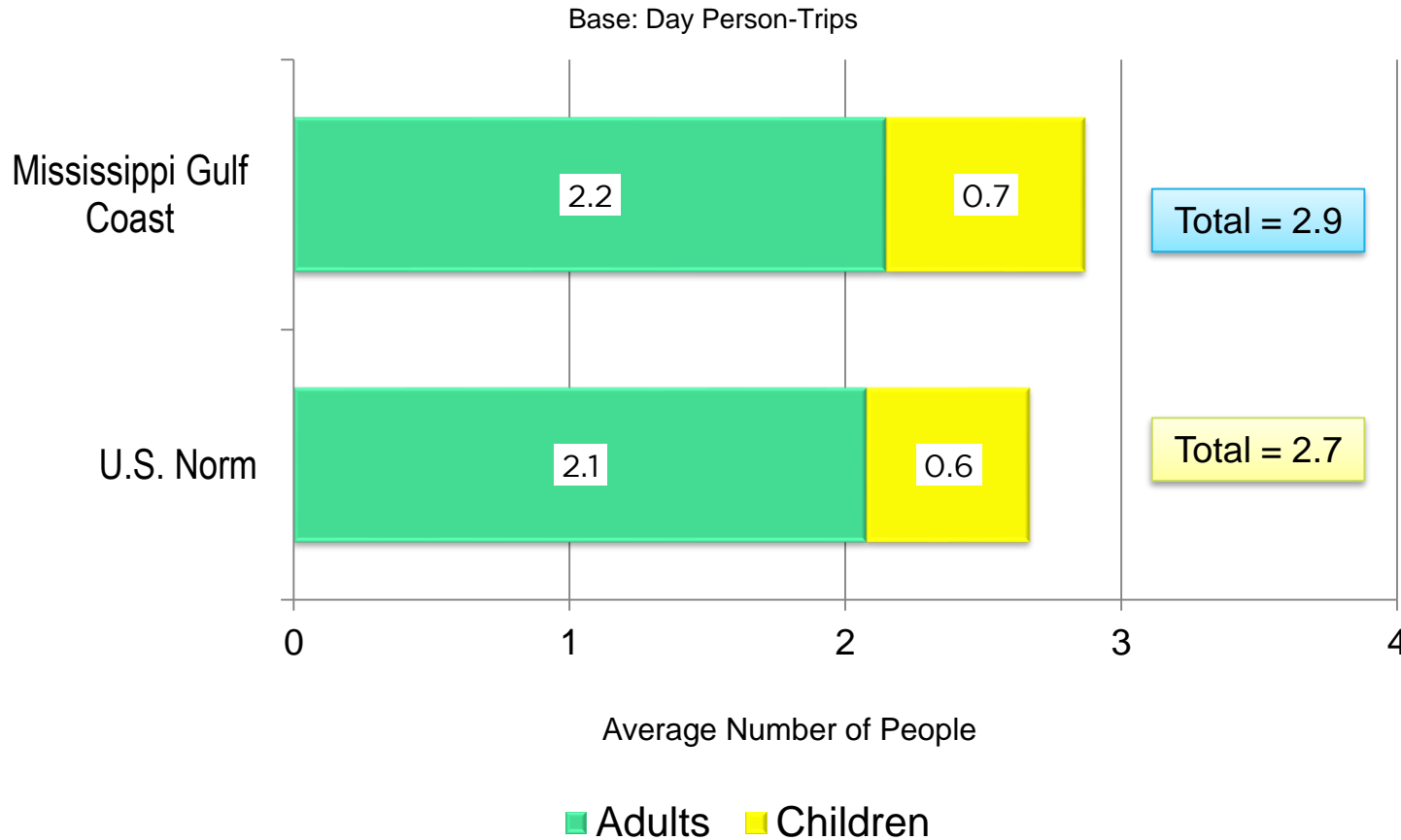
Base: Day Person-Trips



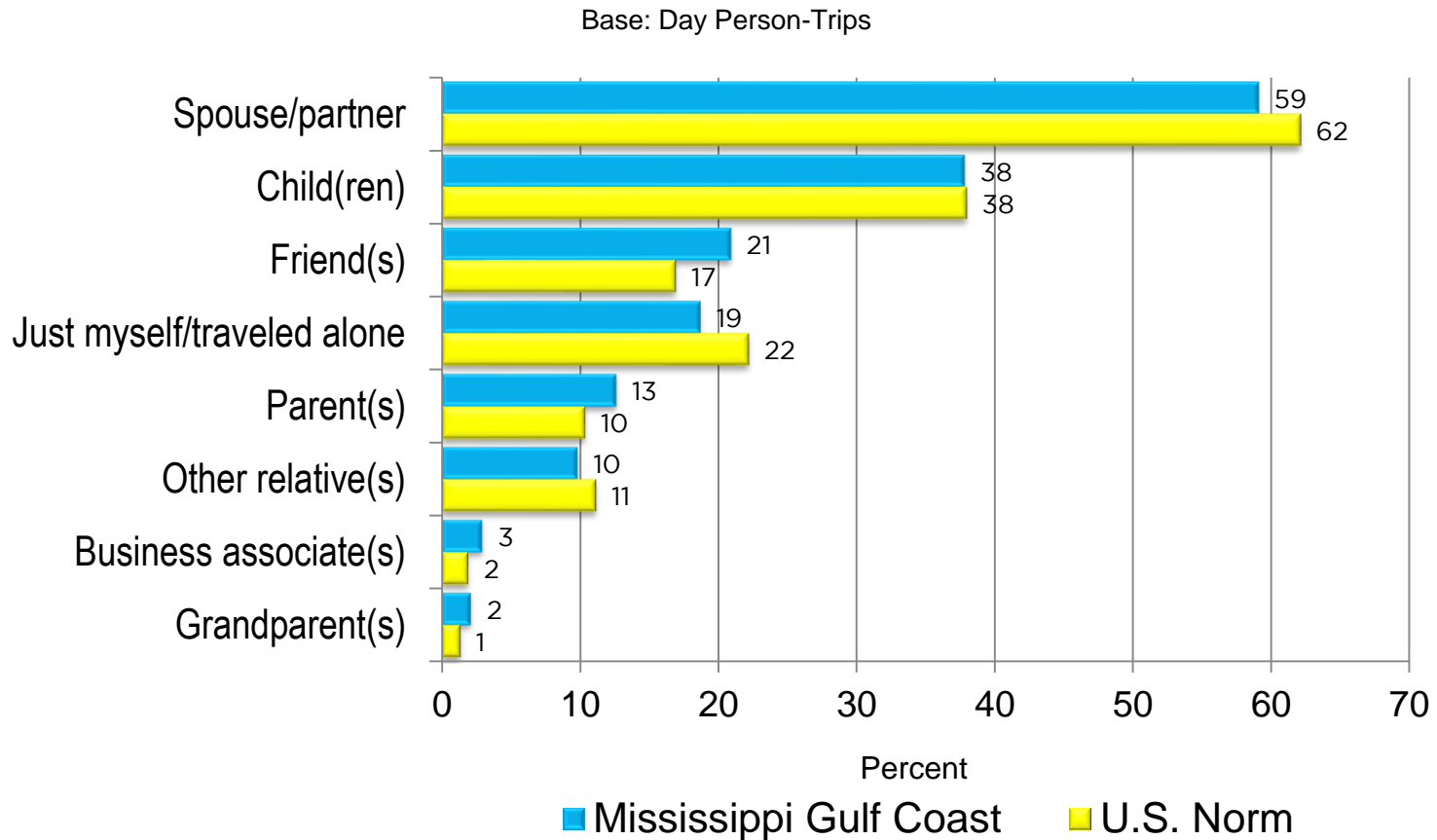
Season of Trip



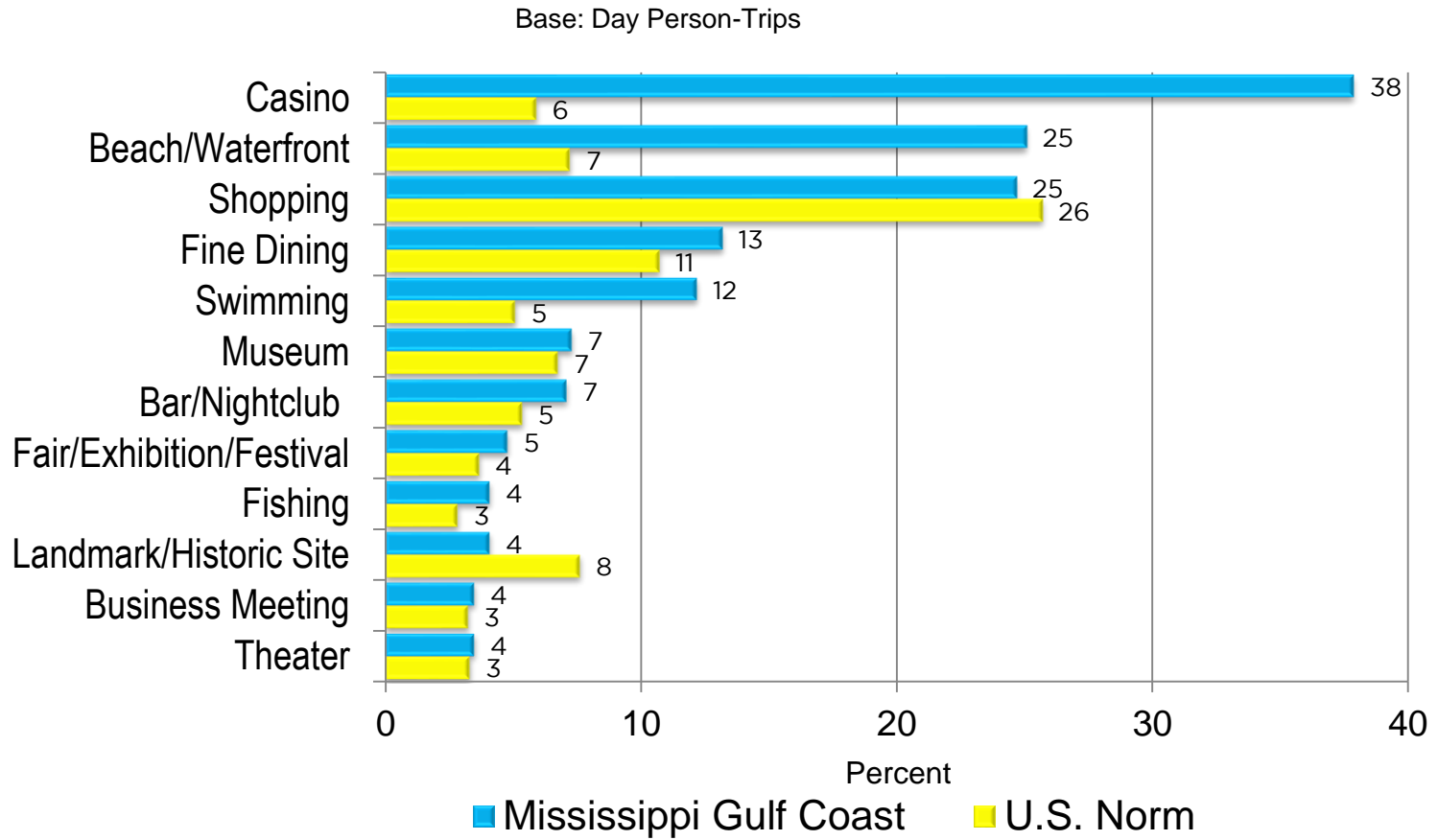
Size of Travel Party



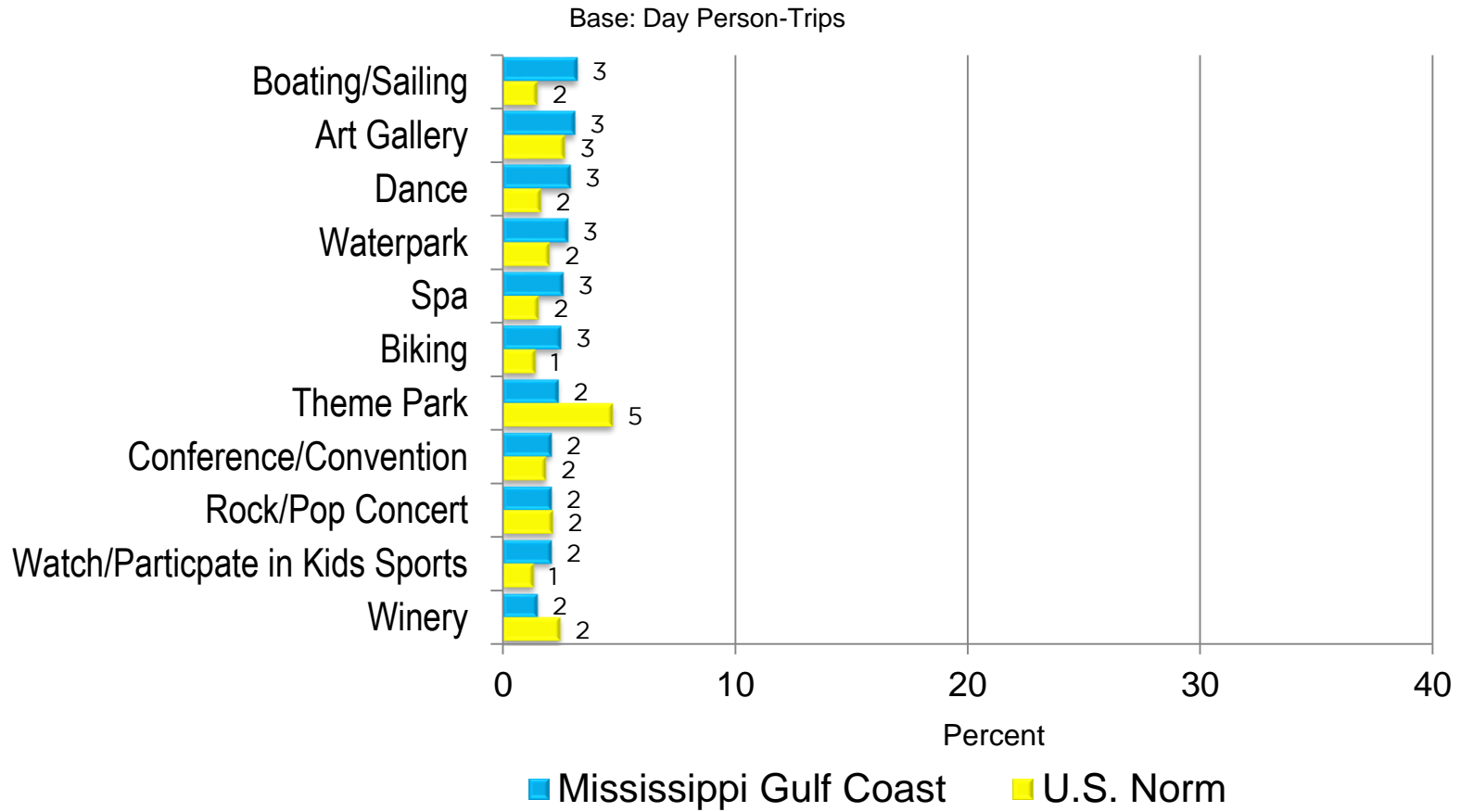
Composition of Immediate Travel Party



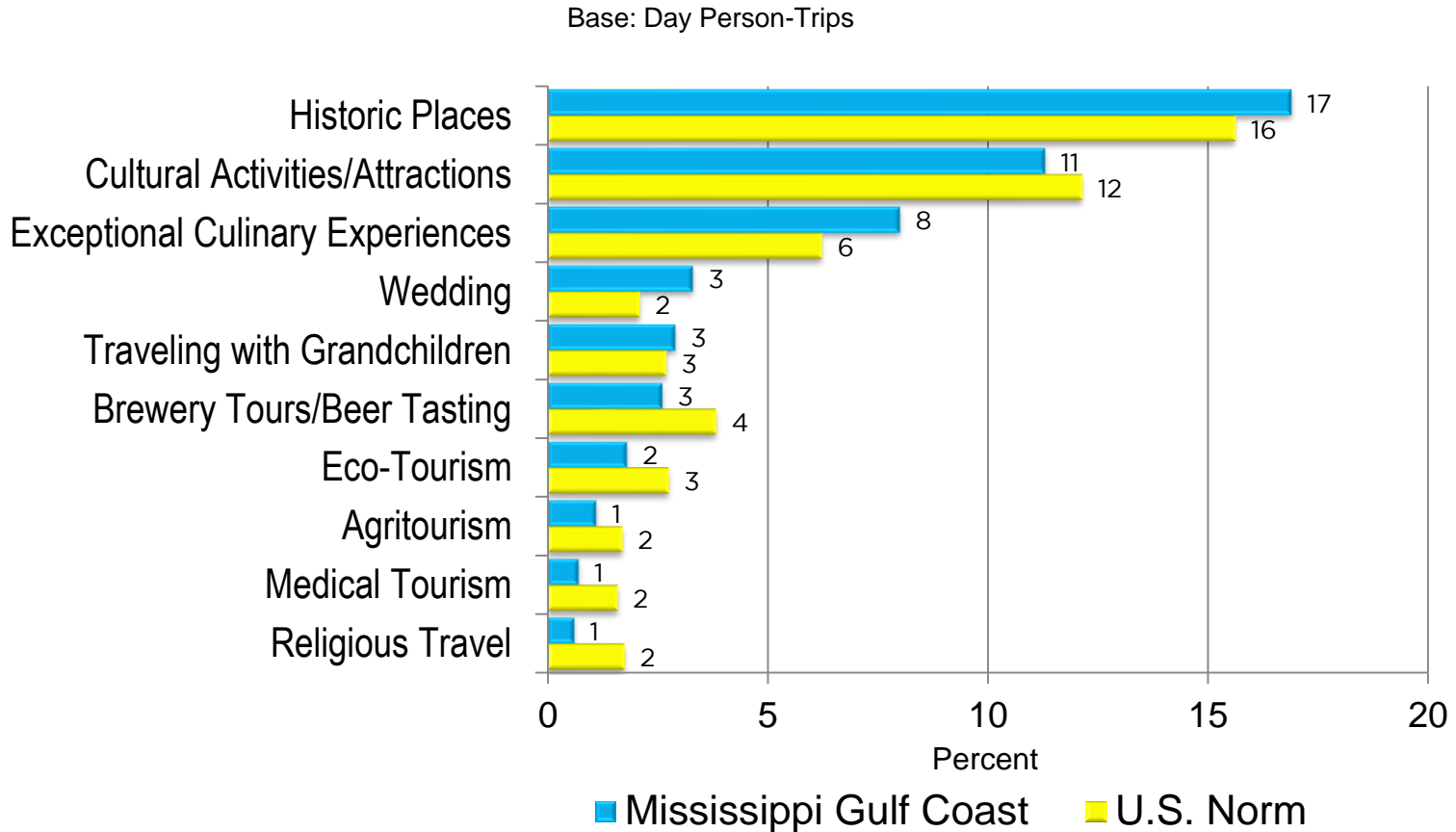
Activities and Experiences



Activities and Experiences (Cont'd)

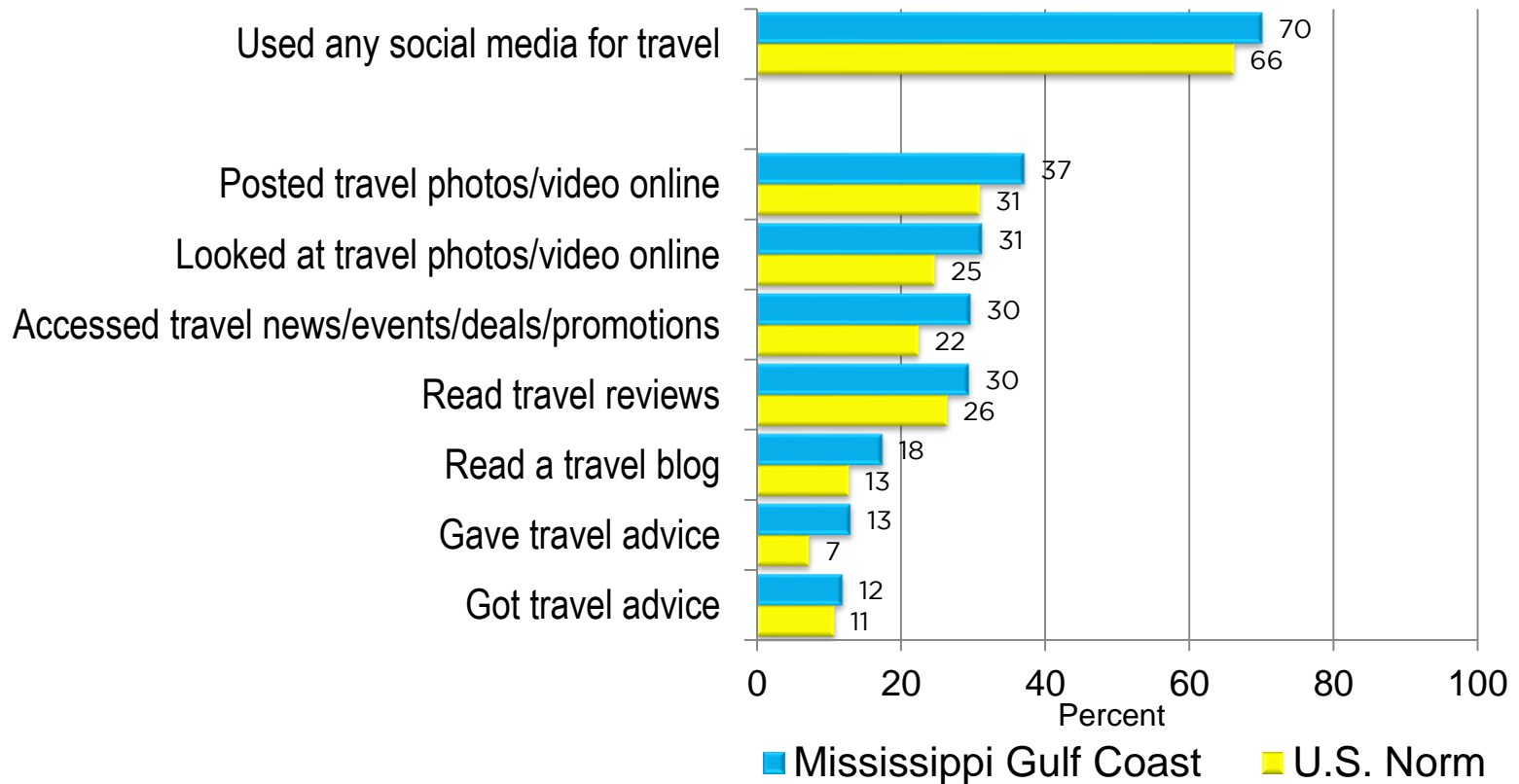


Activities of Special Interest

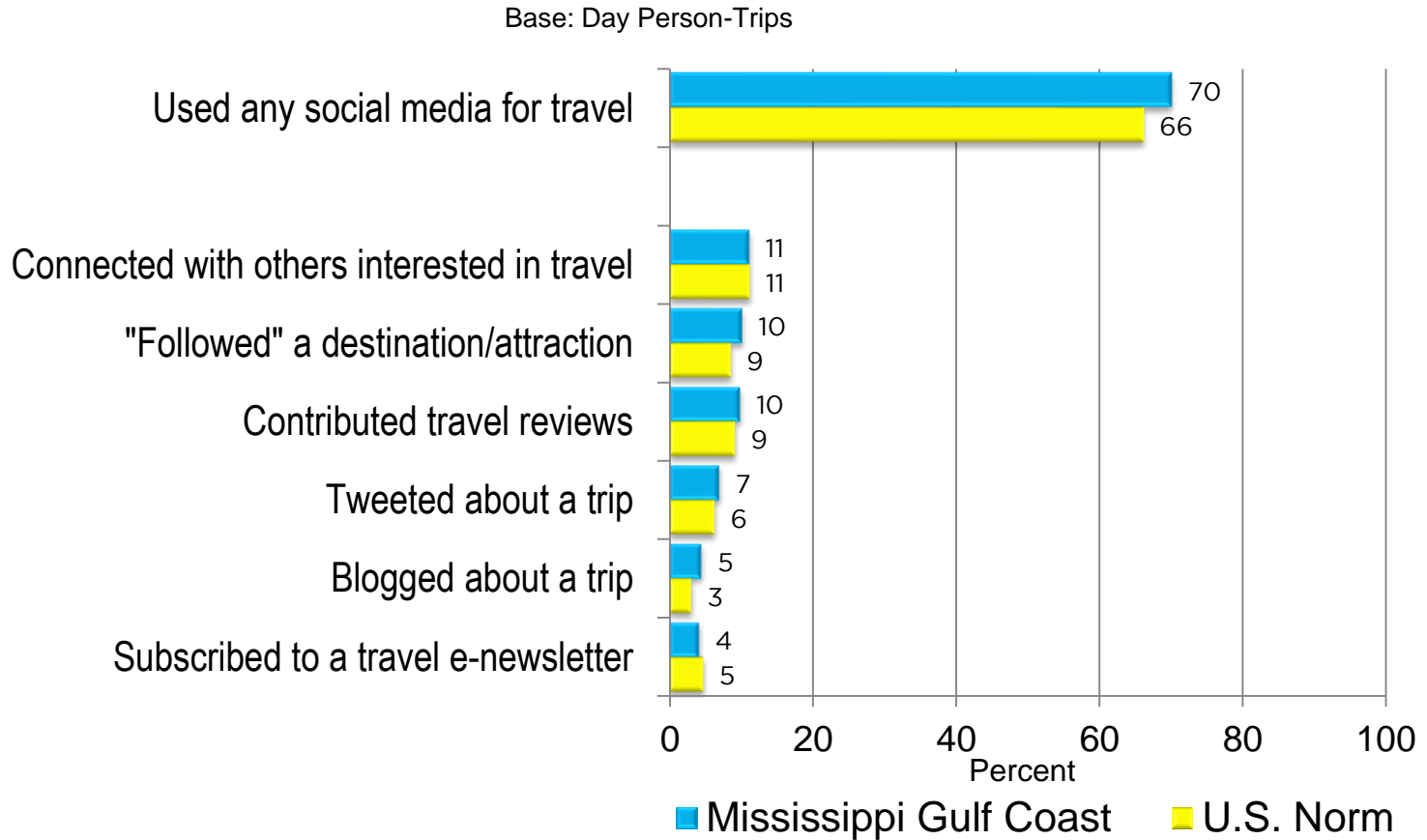


Online Social Media Use by Travelers

Base: Day Person-Trips

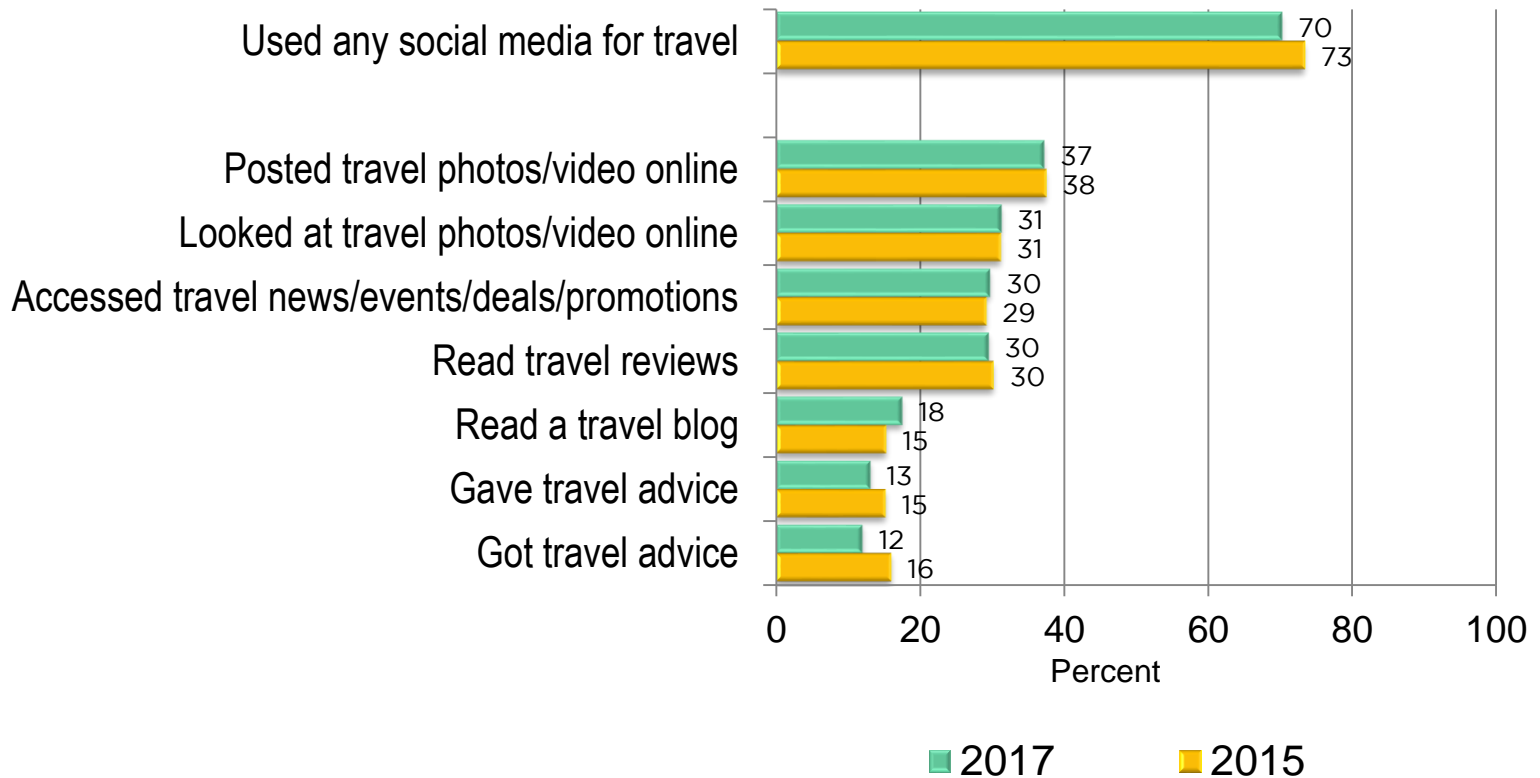


Online Social Media Use by Travelers (Cont'd)



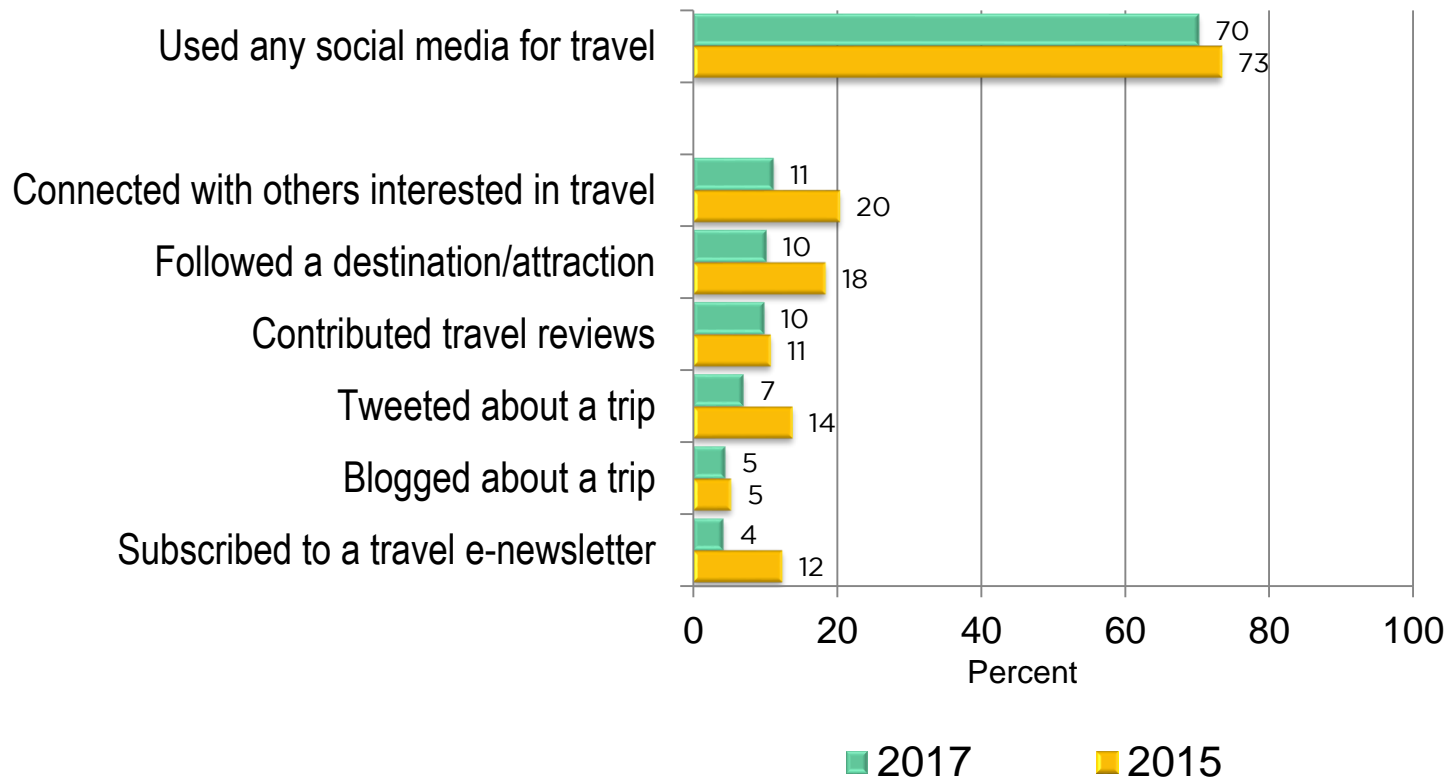
Online Social Media Use by Travelers – 2017 vs. 2015

Base: Day Person-Trips

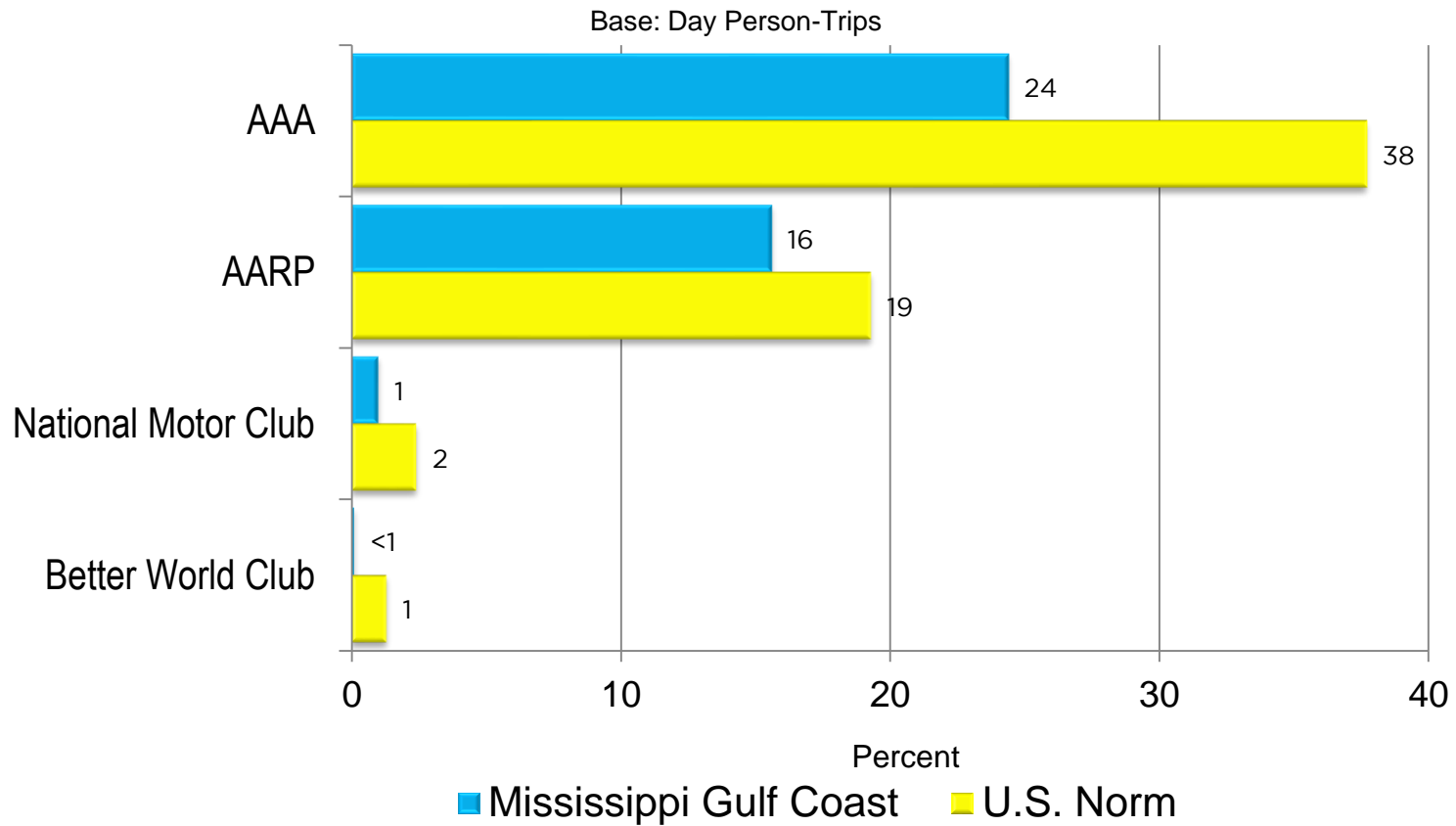


Online Social Media Use by Travelers – 2017 vs. 2015 (Cont'd)

Base: Day Person-Trips



Organization Membership

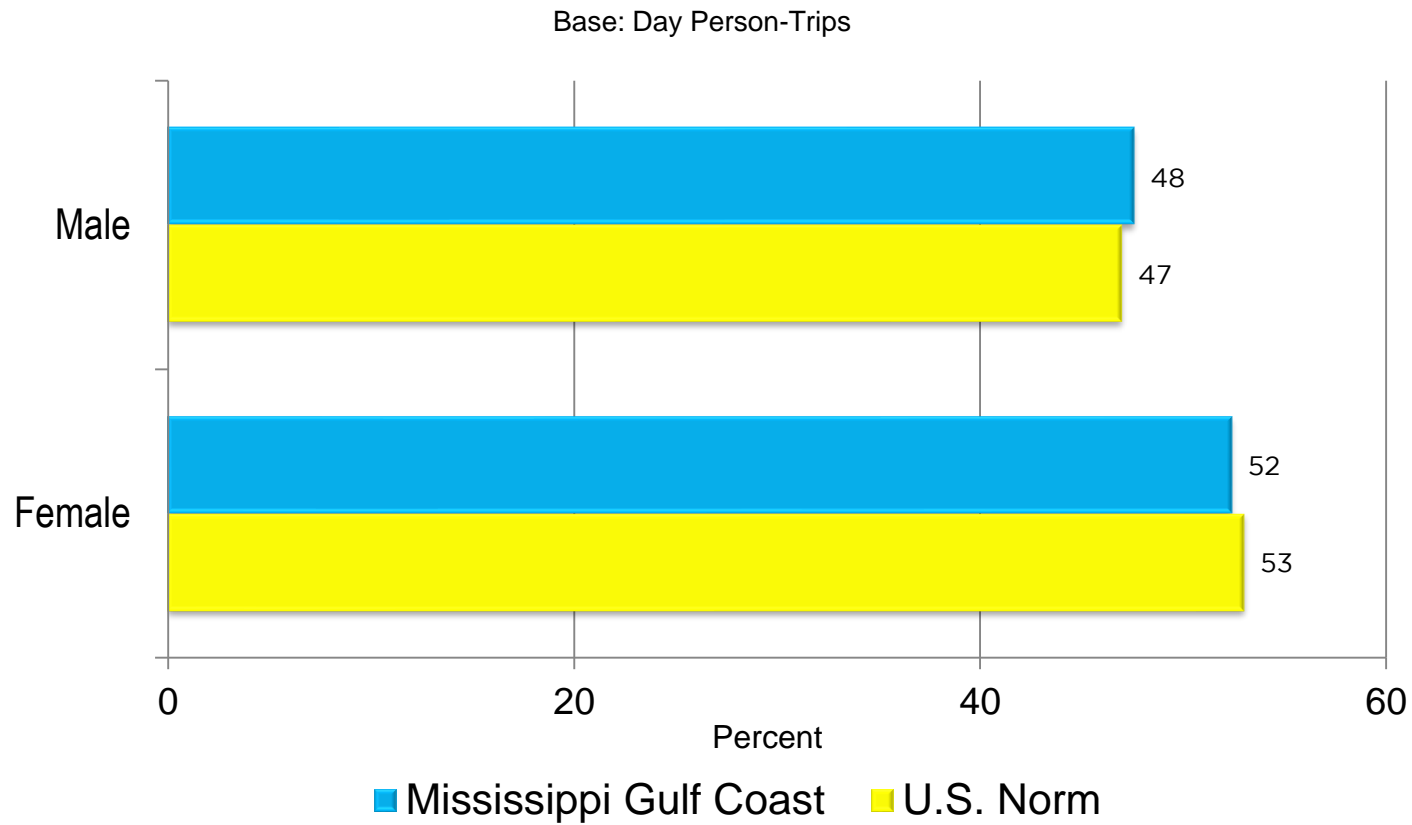




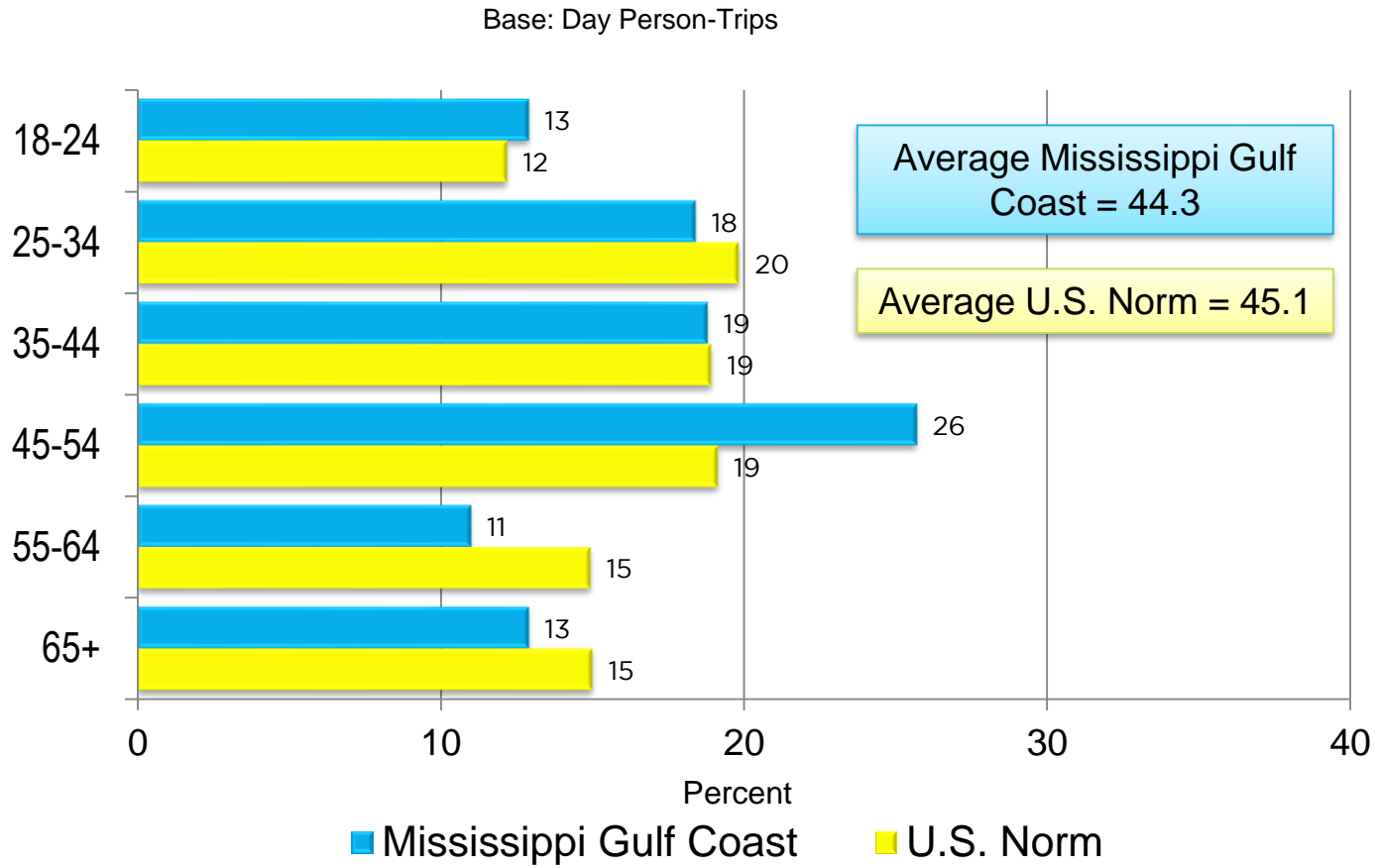
Demographic Profile of Day Visitors



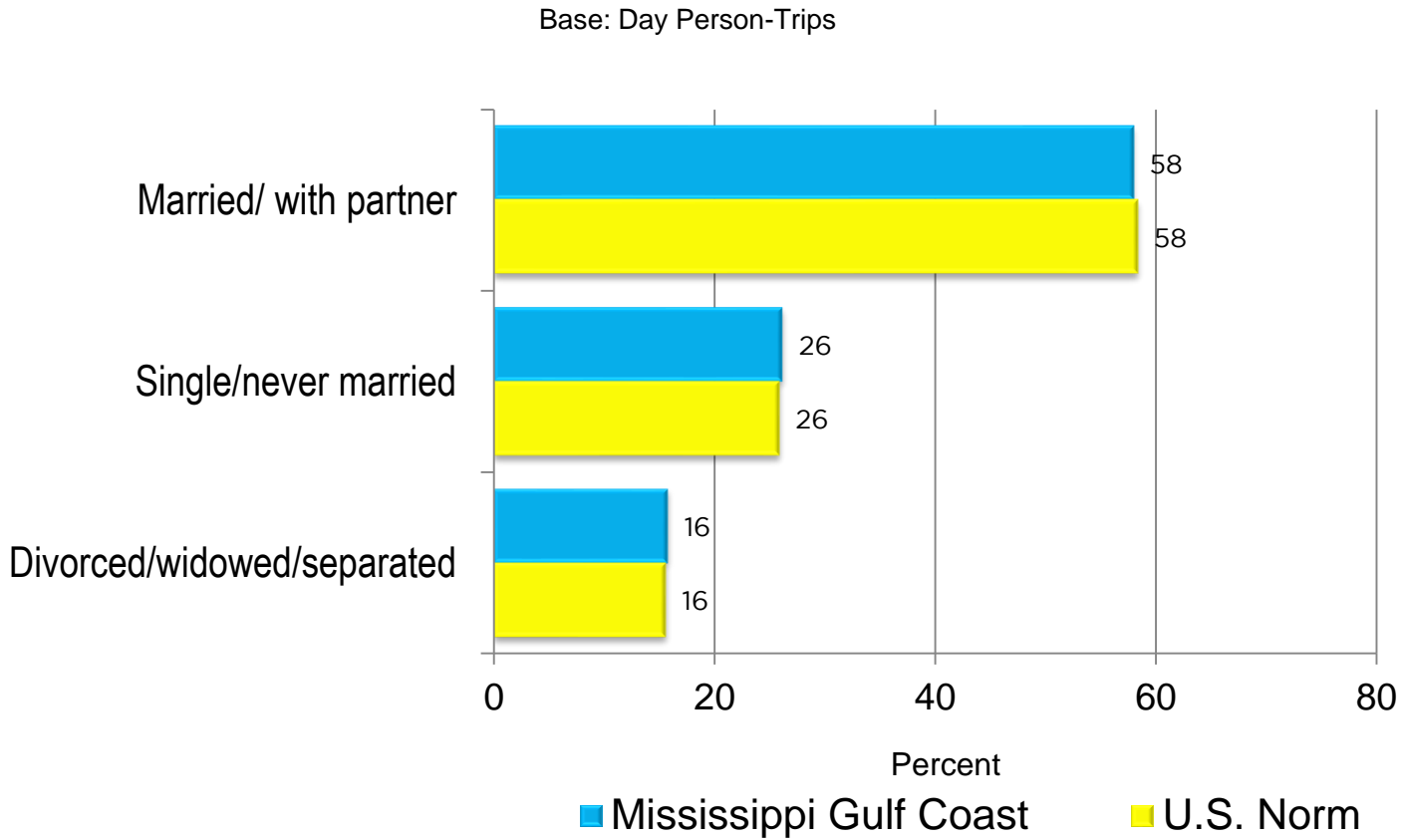
Gender



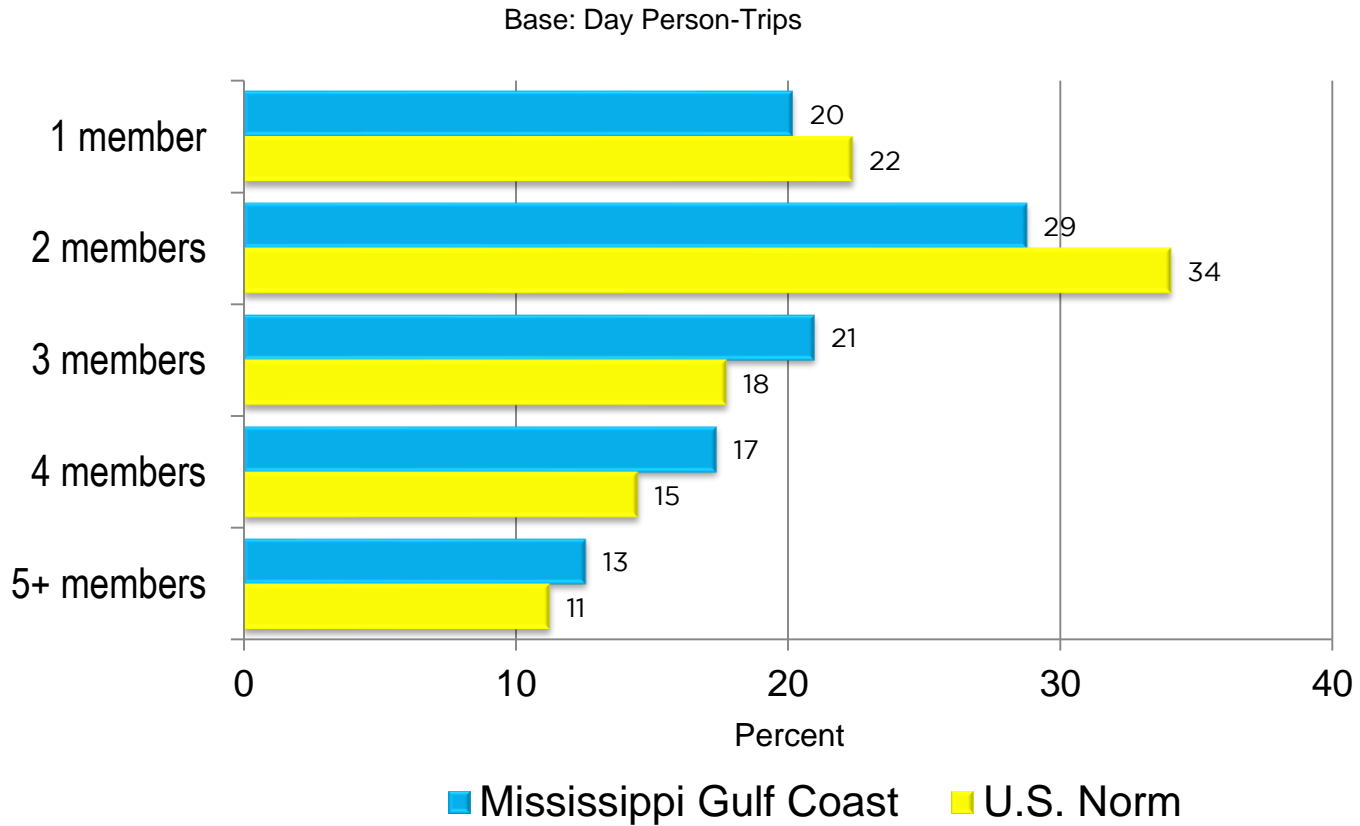
Age



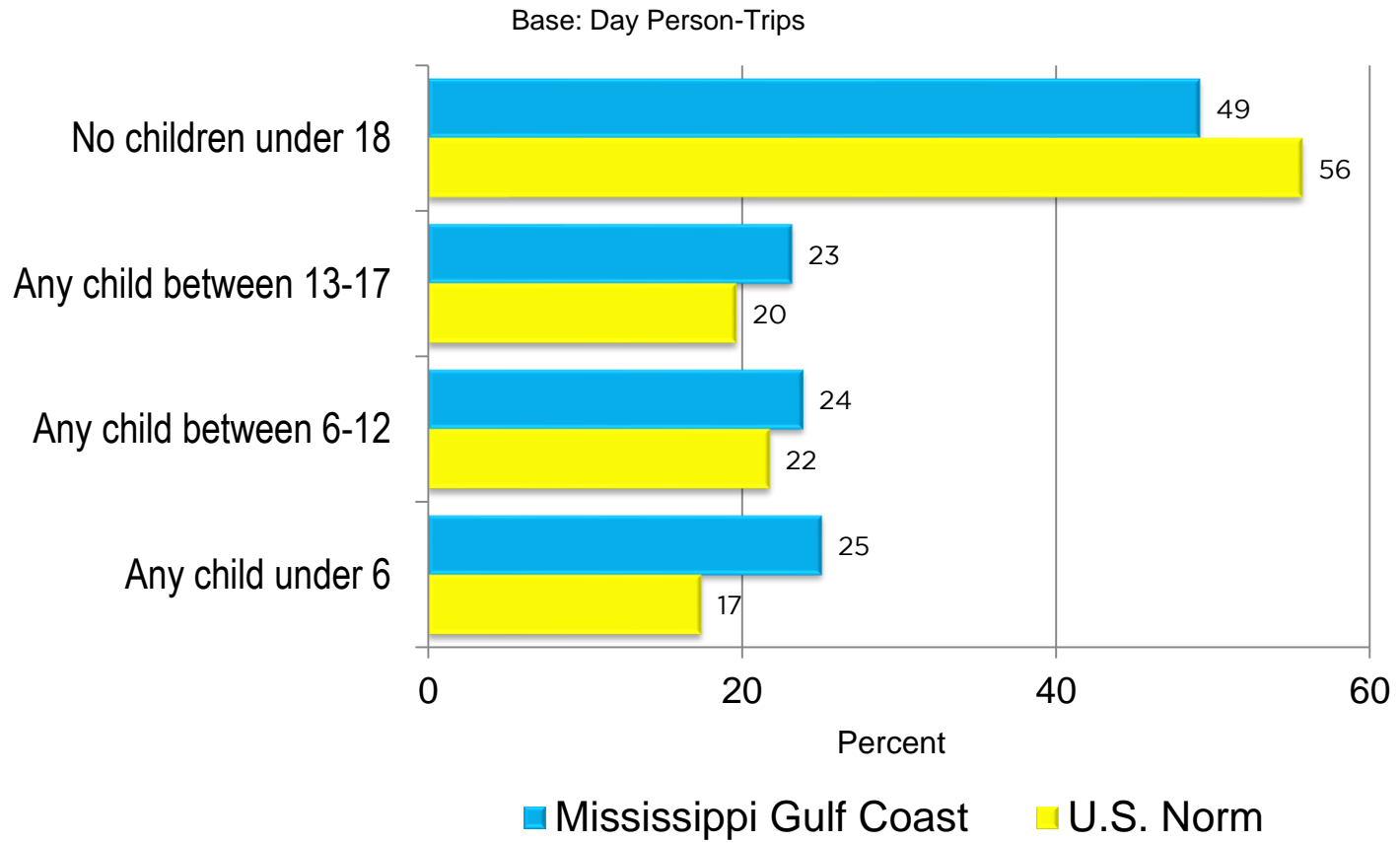
Marital Status



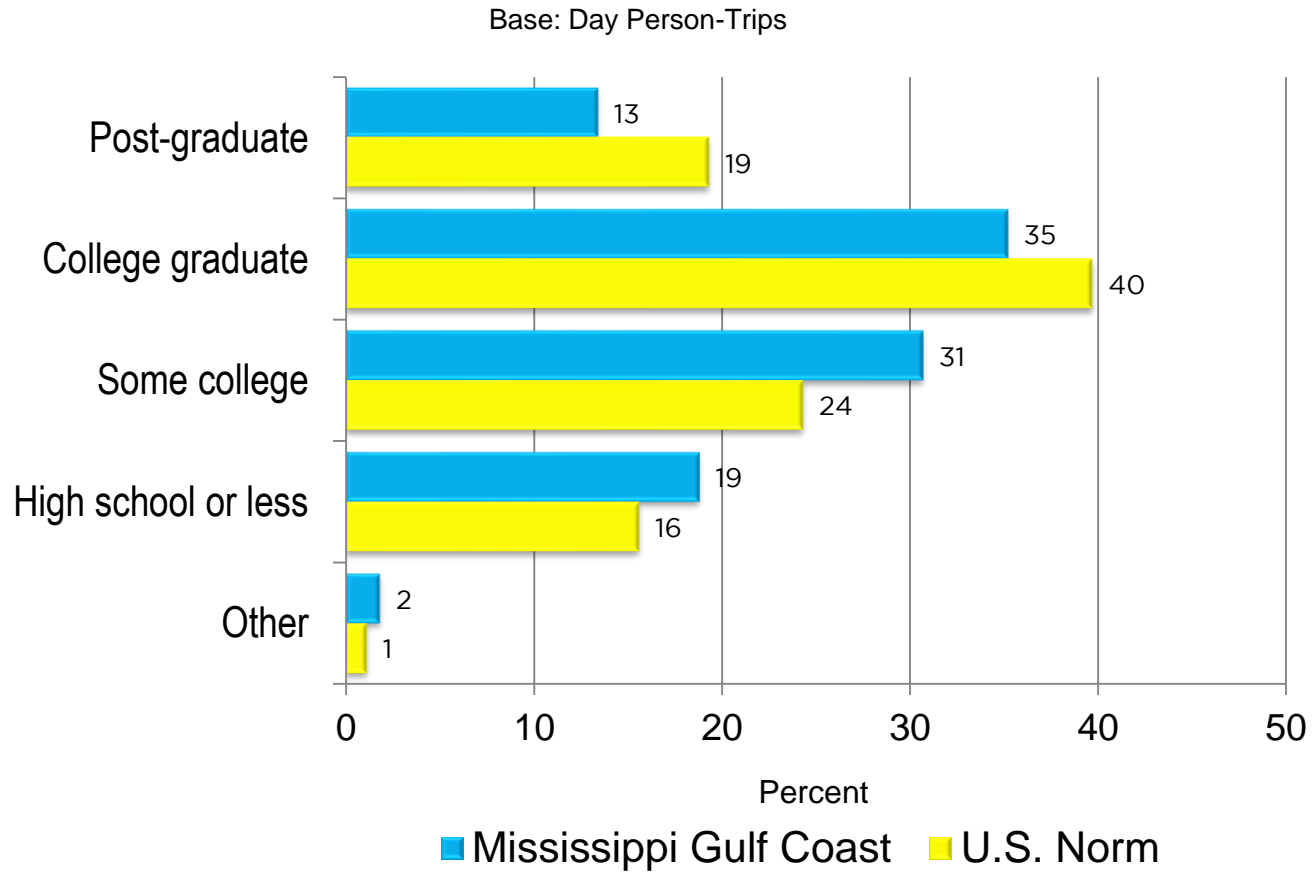
Household Size



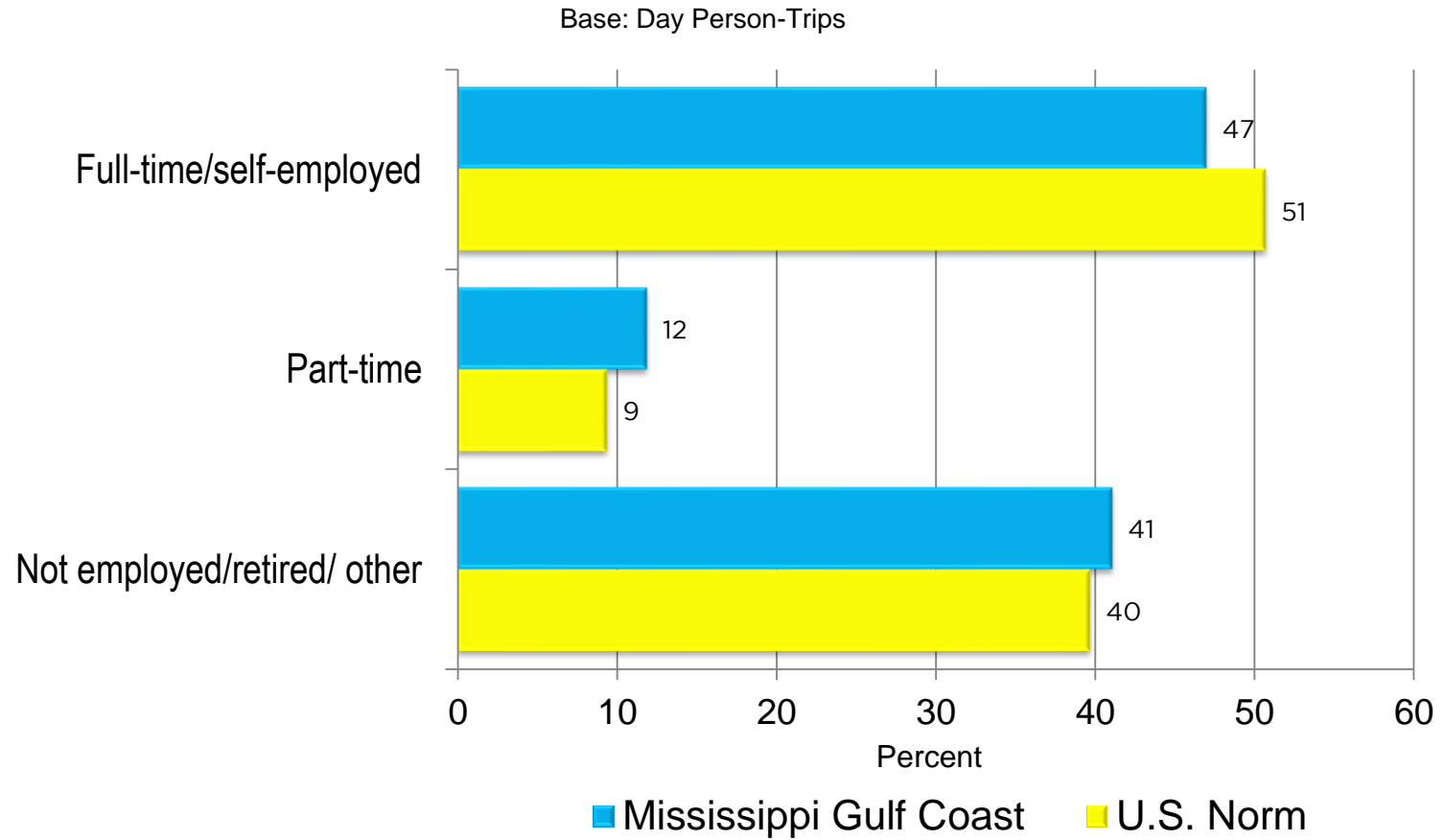
Children in Household



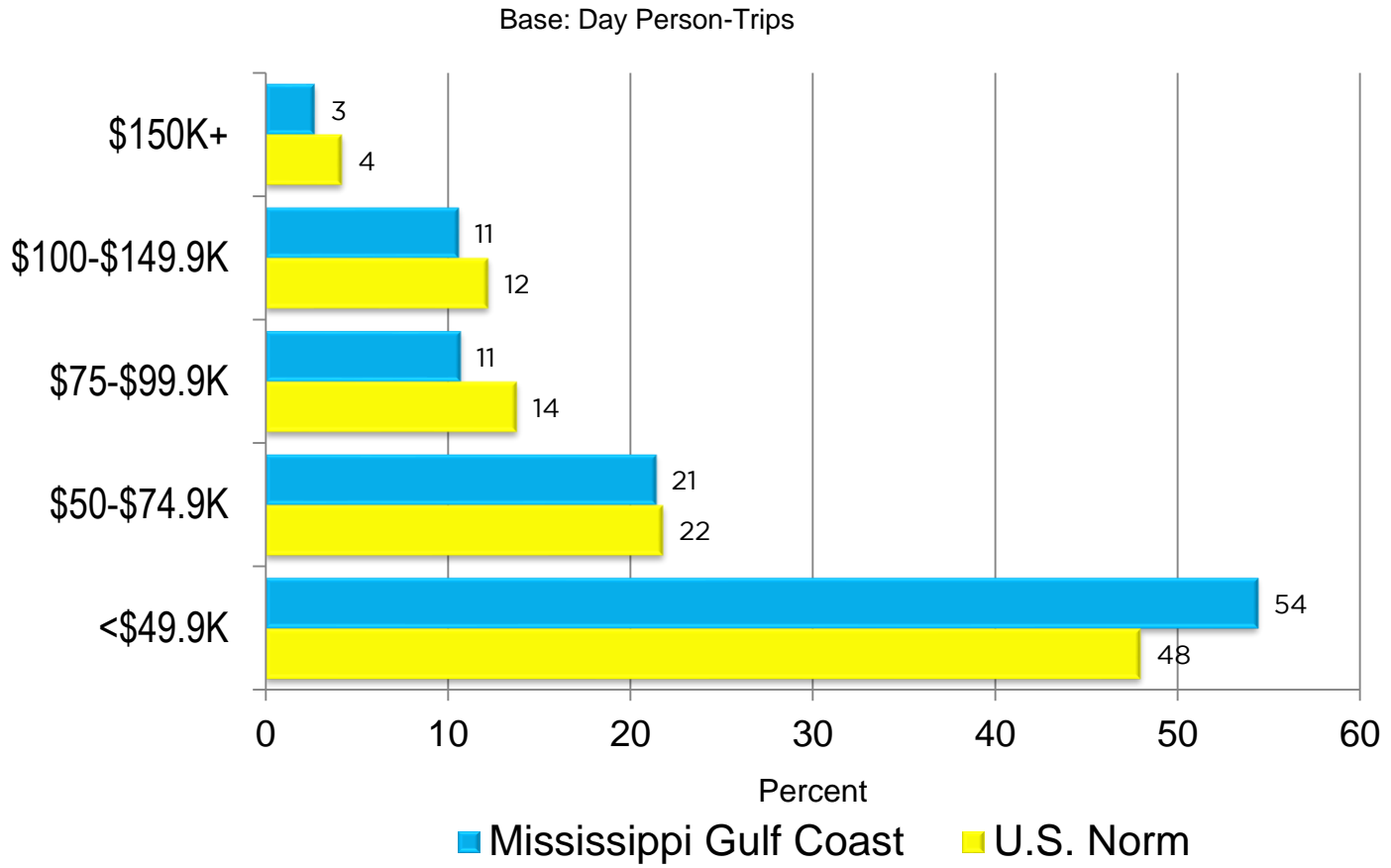
Education



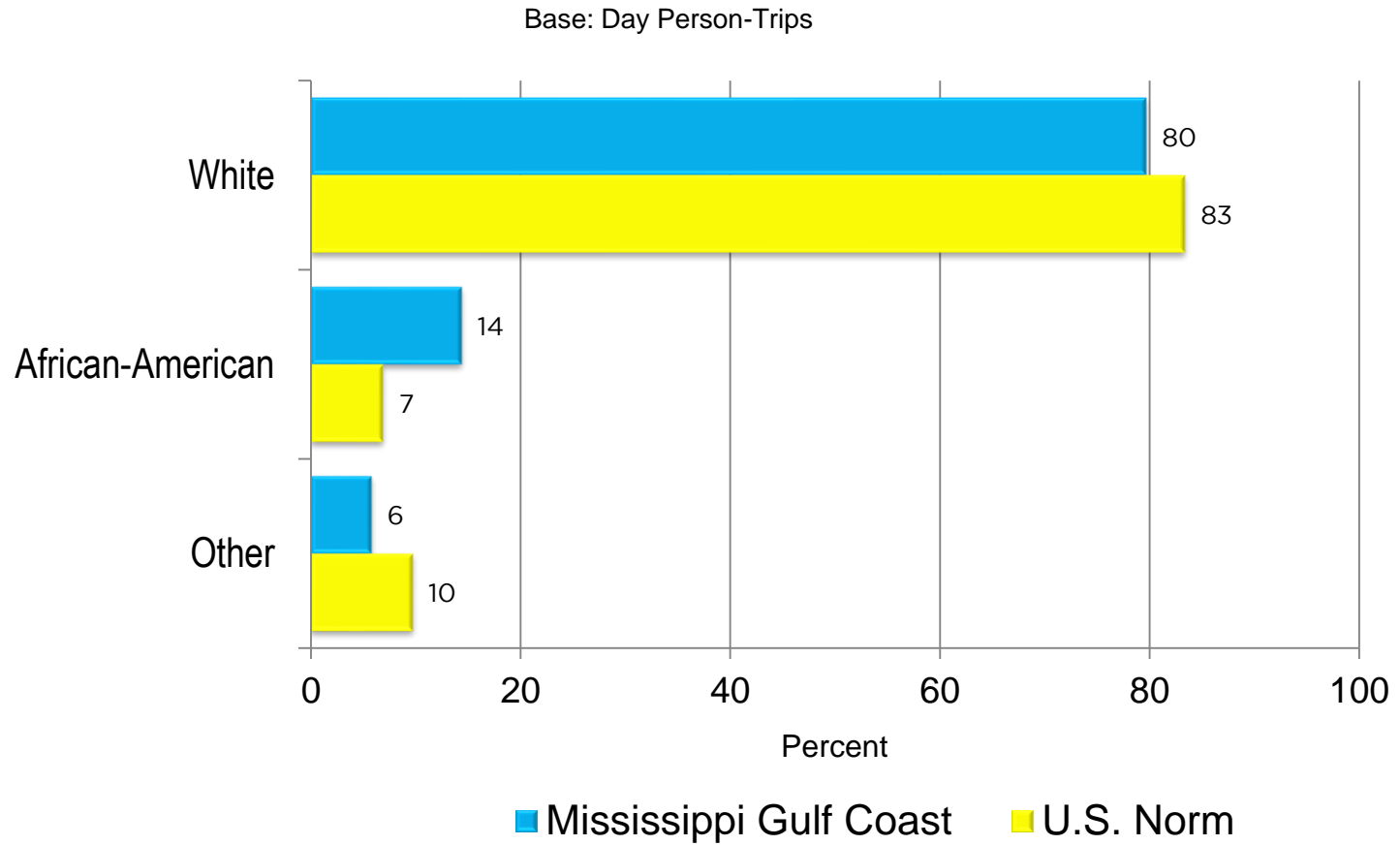
Employment



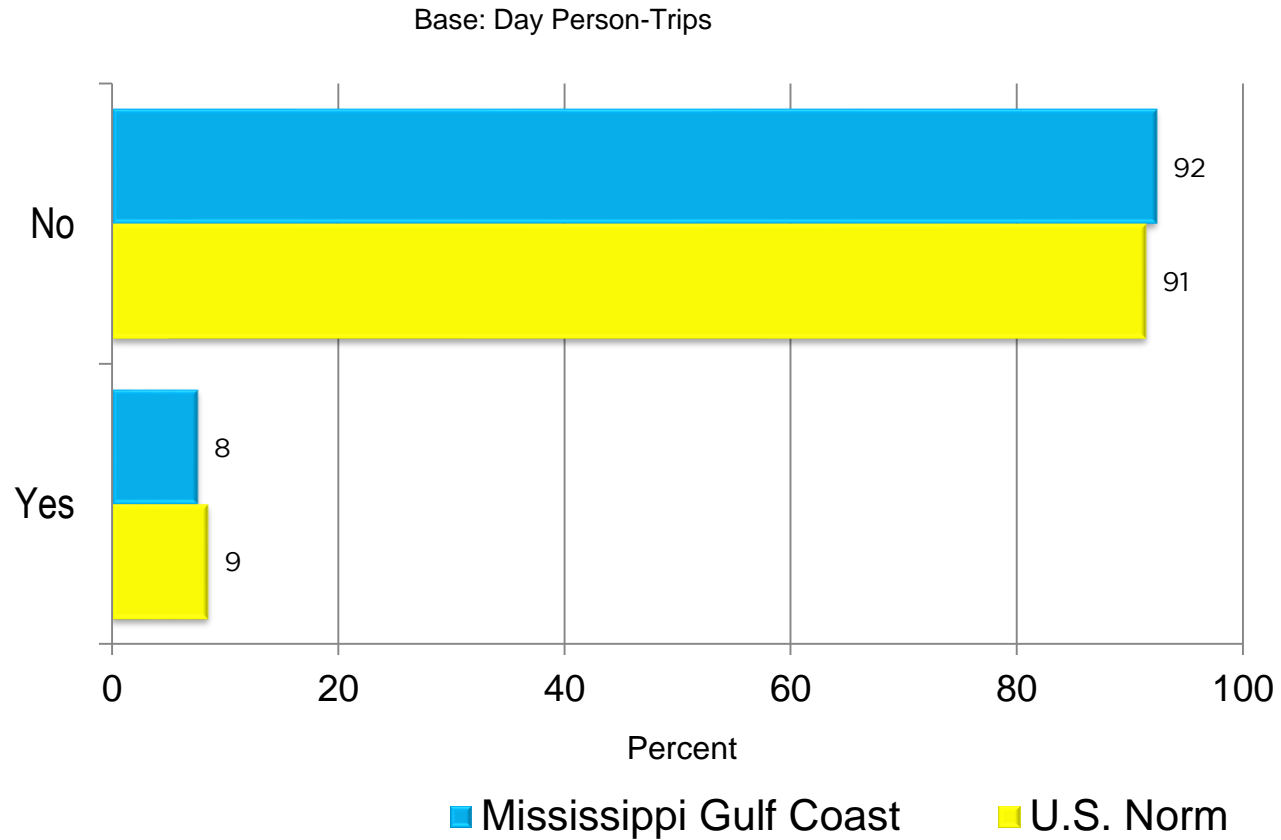
Household Income



Race



Hispanic Background



Appendix: Key Terms Defined



Key Terms Defined

- An **Overnight Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, where you spent one more nights away from home.
- A **Day Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, that did not include an overnight stay. Day trips involve travel of more than 50 miles from home.
- A **Person-Trip** is one trip taken by one visitor.
 - Person-trips are the key unit of measure for this report.

Trip-Type Segments

Total Trips = Leisure + Business + Business-Leisure

- **Leisure Trips:** Include all trips where the main purpose was one of the following:
 - Visiting friends/relatives
 - Touring through a region to experience its scenic beauty, history and culture
 - Outdoors trip to enjoy activities such as camping, hunting, fishing, hiking, and boating
 - Special event, such as a fair, festival, or sports event
 - City trip
 - Cruise
 - Casino
 - Theme park
 - Resort (ocean beach, inland or mountain resort)
 - Skiing/snowboarding
 - Golf
- **Business Trips:**
 - Conference/convention
 - Other business trip
- **Business-Leisure:** a trip for business where, on the same trip, the visitor stayed for at least one additional day to experience the same place or nearby area simply for leisure.

Marketable Trips:

Include all leisure trips, with the exception of visits to friends/relatives