

FY 2019 Mississippi TravelTrakAmerica Visitor Profile and Insights Report January 28,2020



Contents

1	Key Takeaways	3
2	Report Overview	5
3	Executive Summary	9
4	Appendix: Detailed Results	17
5	Share of Visitors	18
6	Source Markets and Trip Types	23

7	Planning and Booking	26
8	Trip Characteristics	31
9	Activities by Age	39
10	Niche Vacation Motivations	41
11	Demographics	44
12	Competitive Environment	46

KEY TAKEAWAYS



Key Takeaways

1. Proximity influences travel to Mississippi. The state benefited from a boost from both in-state and out-of-state visitor volume, with touch-states and their respective cities continuing to dominate out-of-state visitor source markets. Further support for proximity's importance is found in Mississippi visit intention, with future intent to visit strongest in touch-state markets and nearby Texas. This relative proximity provides Visit Mississippi with greater flexibility in its timing of marketing efforts and developing quick promotions to drive visitation.
2. Travelers from different origin markets visit Mississippi for different purposes. Travelers visiting the state for entrainment/sightseeing mostly come from Jackson, while those visiting for outdoor recreation travel from Memphis. Mississippi will benefit from targeted marketing efforts with creative that speaks to the purposes driving travel from different origin markets.
3. Niche activities motivate travel and generate revenue. Casino Gaming/Sports Betting is a particularly lucrative niche segment, accounting for the highest portion of leisure travelers (24%) and boasting the highest average spend (\$847). To continue capitalizing on this niche segment, marketing efforts should focus on the older population in touch-states (48%), while recognizing that households with younger bettors are important. Soft Adventure is the second most lucrative niche travel group in terms of potential value and who historically live either within Mississippi (36%) or a touch-state (36%), making them a solid potential target given the proximity.

REPORT OVERVIEW



Report Overview

Brand/History

Mississippi Development Authority (MDA)



- 13th Report for MDA
- Continuous online data collection via TravelTrak America

Visitor Type

Visitors to the State of Mississippi – type and purpose of trips:

- Overnight
- Day
- Business
- Leisure

Profile

Visitor Characteristics:

- Source markets: State, DMA
- Demographics: age, children, employment, income, etc.

Trip Characteristics:

- Trip type: overnight, day, leisure, business
- Length of stay
- Activities – including visitor profiling by niche activity
- Transportation
- Spending within state

Benefits

Competitive Analysis:

- Comparison of Mississippi visitors to neighboring states (Arkansas, Alabama, Louisiana and Tennessee) on market share, intent to visit, length of stay, satisfaction, spending, visitor demographics, etc.

Balance of Trade:

- Export/Import spending (non-MS residents spending in MS vs. MS residents traveling elsewhere)
- “Domestic spending” (MS residents vacationing within the state)

Research Methods

Target Audience

- US Households:
 - Weighted demographically (region, age, income, household size, marital status) to reflect the characteristics of US households
 - Calculations count trips taken in each state by respondents; detailed information is collected for up to three trips in the past month and projected to the number of households in the total US
 - Some data represent person-trips – these take into account the immediate travel party size for each household as well
 - Panels historically underrepresent business travelers especially the “road warrior” business traveler, as survey cooperation rates tend to be low due to the very nature of them traveling

Methodology/Timeframe

- TravelTrak America is a web-based study with monthly e-mail invitations sent to representative households from the Kantar TNS panel and its partners
- Data collection focuses on travel taken during the past month
- The field period runs for two weeks, usually starting in the middle of the first week

Sample – Mississippi and Total Travelers: FY July - June

2018 Unweighted	2018 Demographic Weighted	2019 Unweighted	2019 Demographic Weighted	
333	393	375	430	Mississippi Residents
580	628	572	636	Mississippi Visitor Households
45,357	45,114	43,647	46,923	Total for TravelsAmerica

Glossary

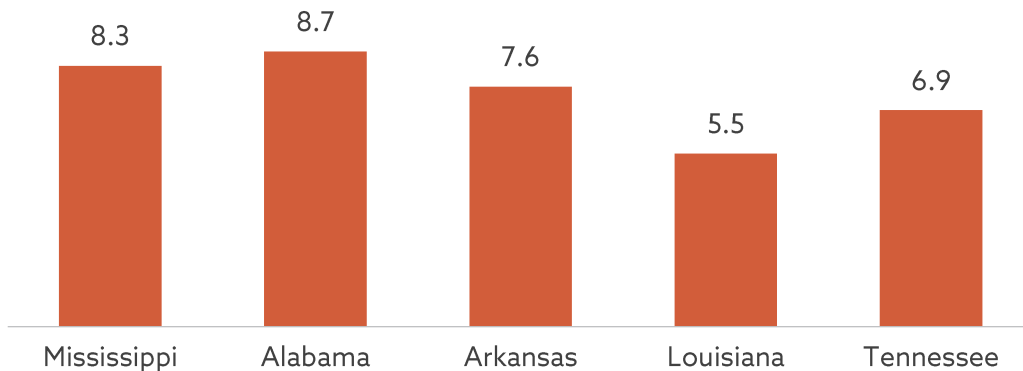
Term	Definition
DMA	Designated Market Area: Counties that share the same primary TV broadcast signals (210 DMAs in US).
Fiscal Year (FY)	July 1 through June 30, all other years except Report Year 2014.
In-State	Travel by Mississippi residents in the state of Mississippi.
Person-Trip	Total person-trips are all trips taken by all people; i.e. a couple taking three trips counts as six (two people, each taking three trips).
Respondent Level	Respondent information – one count per respondent.
Source of Visitors	Residence of visitors.
State Level	Information about all trips taken to a particular state/region (each trip to area counts).
Travel Party	Traveler plus all companions, including children.
Trip	Travel 50+ miles (one-way) away from home or overnight. Excludes commuters or commercial travel (i.e. flight attendants, commercial vehicle operator).
Trip Level	Information about all trips – each trip counts.
U.S. Domestic Travel	U.S. residents who visited at least one U.S. destination.
Mississippi Visitor	A U.S. traveler who visited Mississippi during the specified time period.
Niche Vacation Motivation	An activity or group of activities a Mississippi visitor participated in during their visit, where the niche activity or at least one activity within the niche activity group was a primary or secondary reason for their visit. Niche vacation motivations listed below with activities defining each.
Casino Gaming/Sports Betting	Primary/secondary trip motivation was casino/gaming.
Soft Adventure	Primary/secondary trip motivation was at least one of the following: fishing, horseback riding, motorboat/jet ski, bird watching, camping, caverns, nature travel/ecotouring, viewing wildlife, farms/ranches/agri-tours, other nature, state/national parks/monuments/rec areas, rural sightseeing.
Historical Interest	Primary/secondary trip motivation was at least one of the following: historic sites/churches, museums, Native American ruins/rock art, old homes/mansions.
Cultural Interest	Primary/secondary trip motivation was at least one of the following: art galleries, musical theater, theater/drama, symphony/opera/concert, musical performance/show, local/folk arts/crafts.
Hard Adventure	Primary/secondary trip motivation was at least one of the following: hang gliding/sky diving/base jumping, hiking/backpacking/canyoneering, mountain biking, rock climbing, scuba diving/snorkeling, water skiing, rafting/kayaking/canoeing/paddle board, ATV/four-wheeling, biking/cycling, hunting, sailing.



Tourism generates revenue for Mississippi

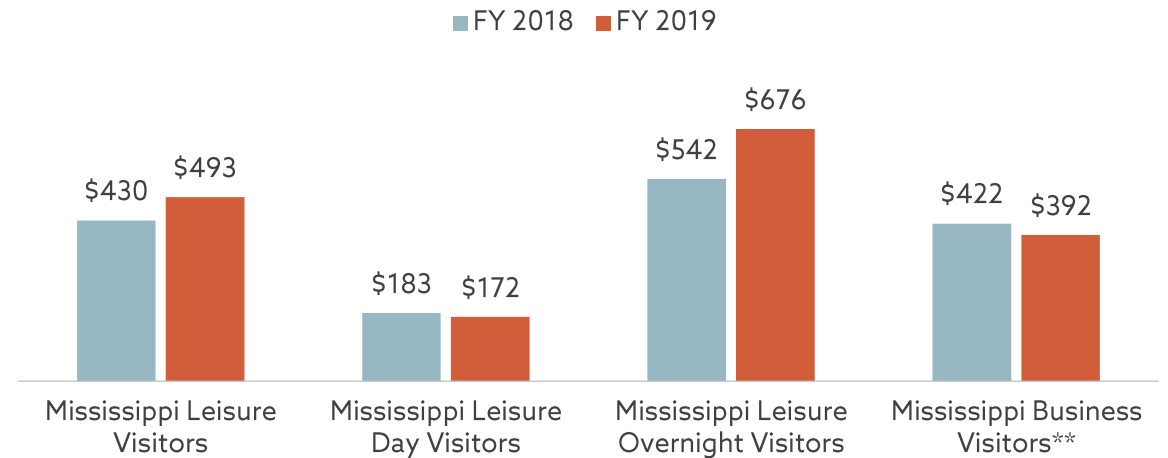
- States benefit financially from tourism. Tourism generates revenue, not only for industry businesses directly, but also in taxes (i.e. sales/lodging/etc.). The ratio of visitors per population helps show the relevance of tourism to the state of Mississippi. Receiving many tourists per population shifts some of the tax burden away from residents.
- Mississippi's ratio of visitors per population is relatively high among its touch-states.

Ratio of Visitors per Population



- Leisure spending in Mississippi experienced a boost in the most recent fiscal year, while spending by business travelers dipped.
- Overnight leisure visitors spent considerably more during FY 2019 than the previous fiscal year and continue to be the most desirable visitor type—spending nearly four times the amount as leisure day travelers.

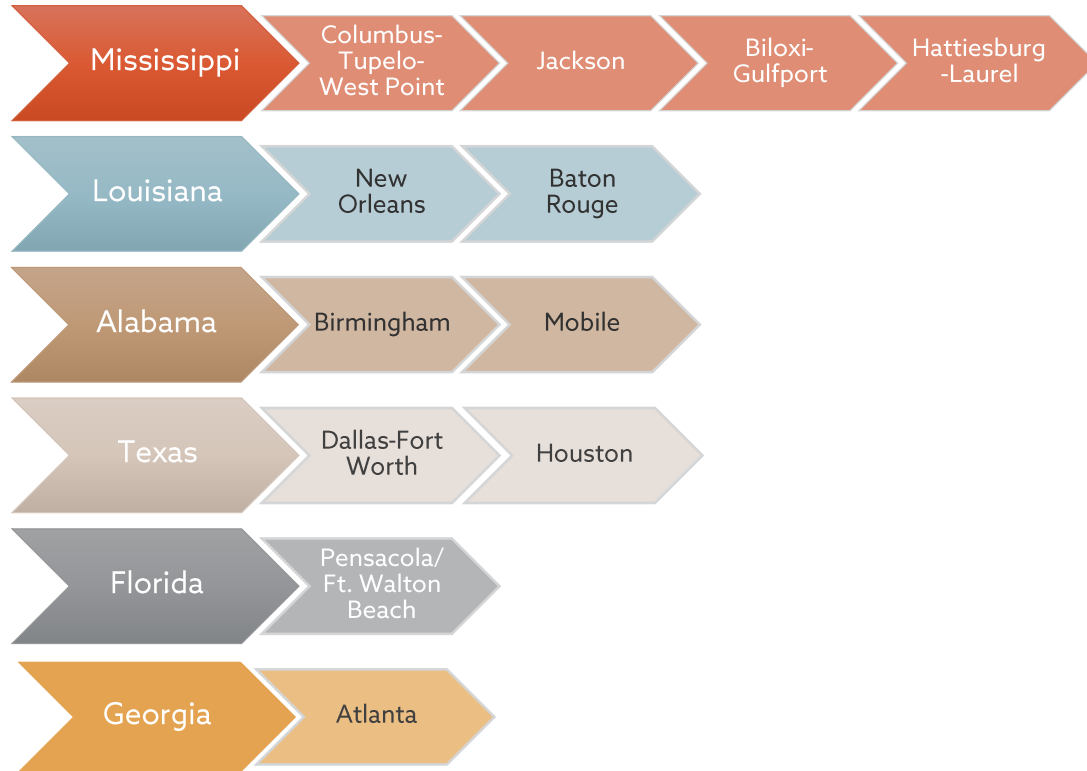
Average Spend by Type of Trip



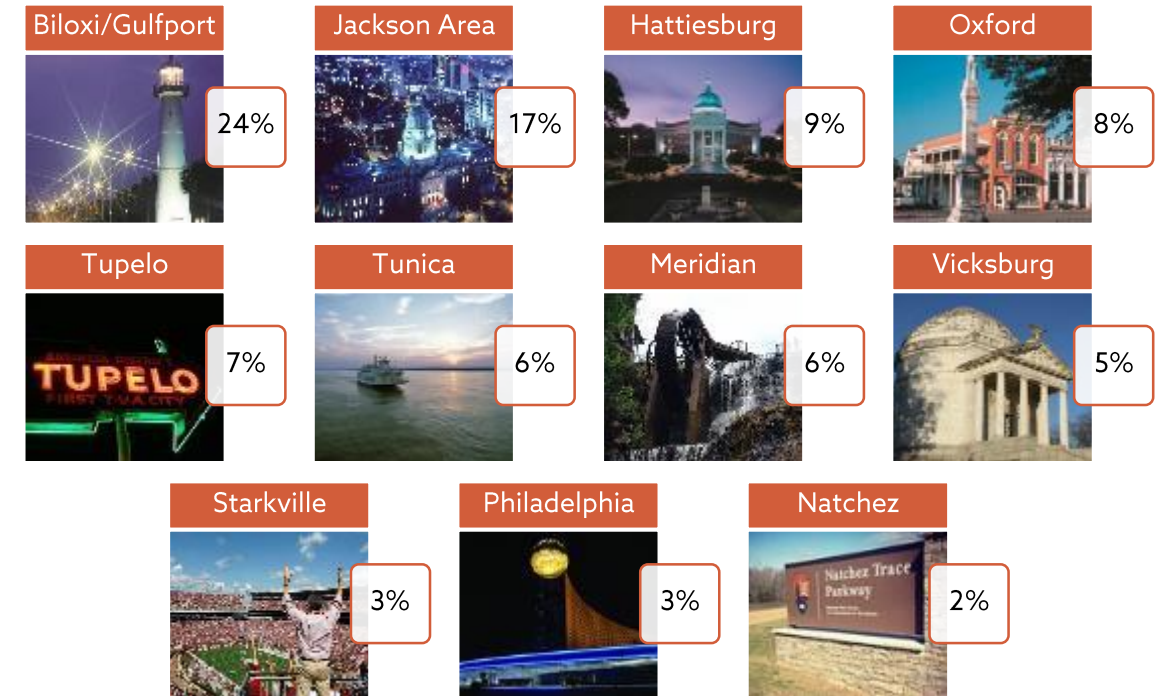
Where visitors come and where they go

- Mississippi primarily draws visitors from in-state and touch-states, although Texas, Florida and Georgia add to volume as well.
- Visitor destinations differ between residents and non-residents, with out-of-state visitors more likely choosing gaming centers (Biloxi/Gulfport and Tunica). Meanwhile, in-state visitors are more likely to visit the capital (Jackson), Hattiesburg, and Tupelo.

Where Mississippi Visitors Come From



Where Visitors Go in Mississippi

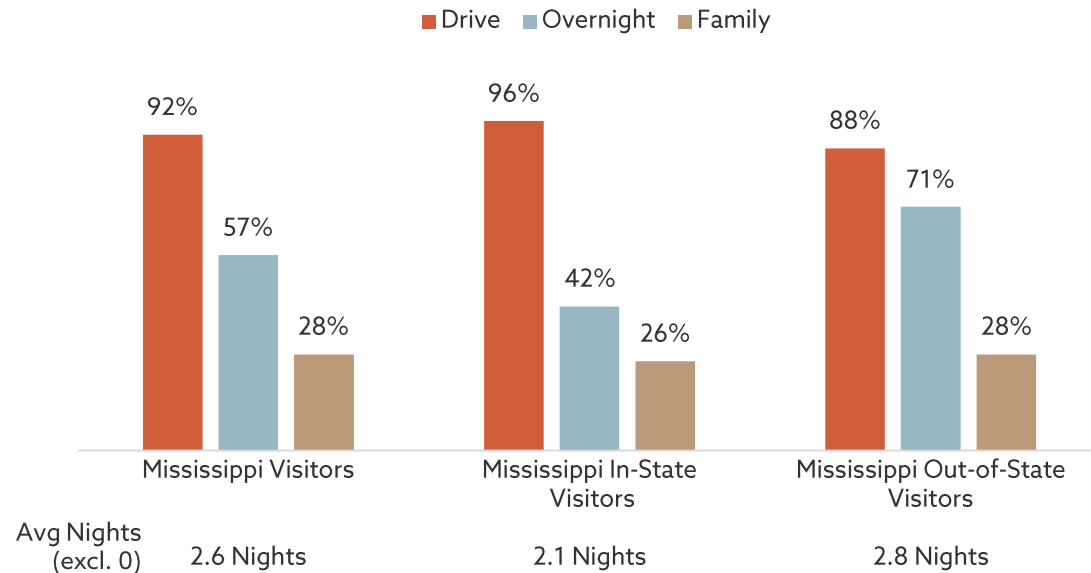


How they get to Mississippi and what they do

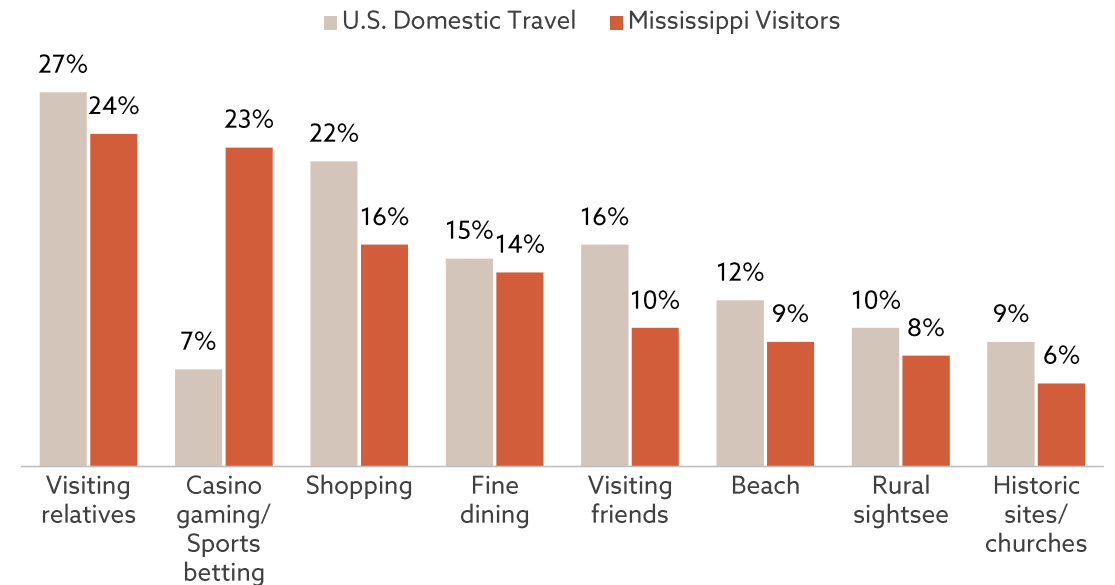
- Mississippi primarily receives out-of-state visitors (61%). Most out-of-state visitors drive (88%) and choose to stay overnight (71%), staying an average of 2.8 nights. Among in-state visitors, nearly all drive (96%) and although a smaller portion stay overnight (42%), more travel with children (36%).

- Although visiting friends is the top activity of Mississippi visitors, casino gaming and sports betting continues to be important and an activity enjoyed by many Mississippi visitors, regardless of whether it was the reason motivating their trip. At the same time, other activities (i.e. shopping, dining, friends, and the beach) remain important as well.

Trip Purpose, Transportation, Children, Overnights



Top Activities of Mississippi Visitors



Niche activities can be reasons motivating travel and characteristics of visitors motivated by different activity niches vary

Casino Gaming/Sports Betting

- 24% of leisure visitors
- Older – average age 56
- Spend per party/trip: \$847 (highest)
- Nearly half from a touch-state (48%)
- 83% stay overnight
- Length of stay: 2.2 nights

Soft Adventure

- 11% of leisure visitors
- Spend per party/trip: \$445
- Even split between MS residents (36%) and touch-state (36%)
- 71% stay overnight
- Length of stay: 2.3 nights (longest)

Historical Interest

- 6% of leisure visitors
- Spend per party/trip: \$587
- 32% from MS and 26% are from touch-state
- 71% stay overnight
- Length of stay: 1.9 nights

Cultural Interest

- 4% of leisure visitors
- Highest % of African-Americans (19%)
- Spend per party/trip: \$594
- 42% from MS; 31% from touch-state
- 67% stay overnight (smallest)
- Length of stay: 1.9 nights

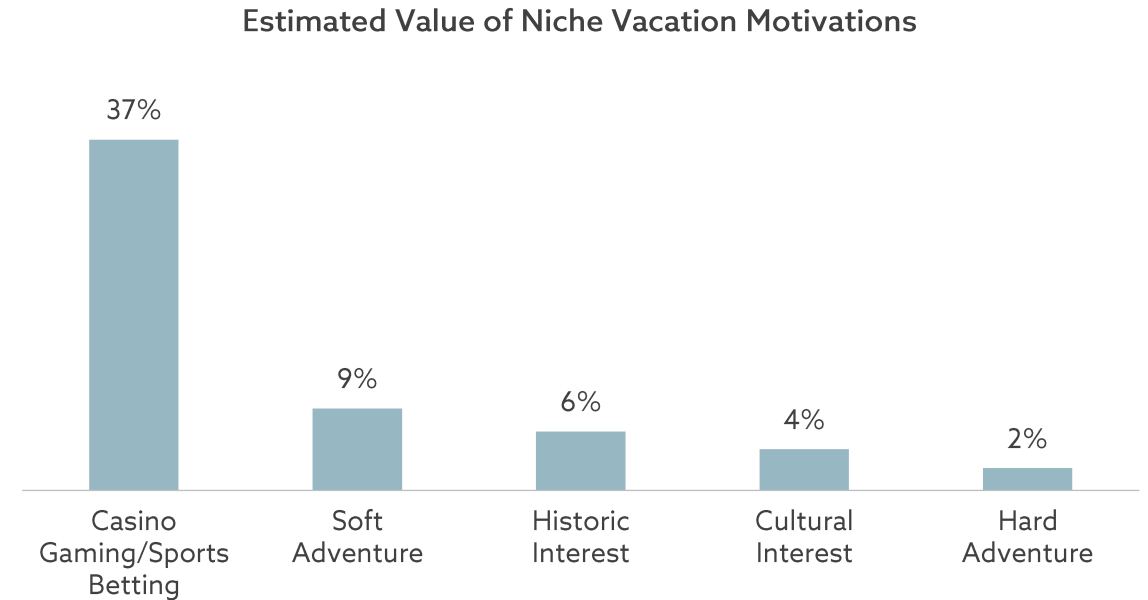
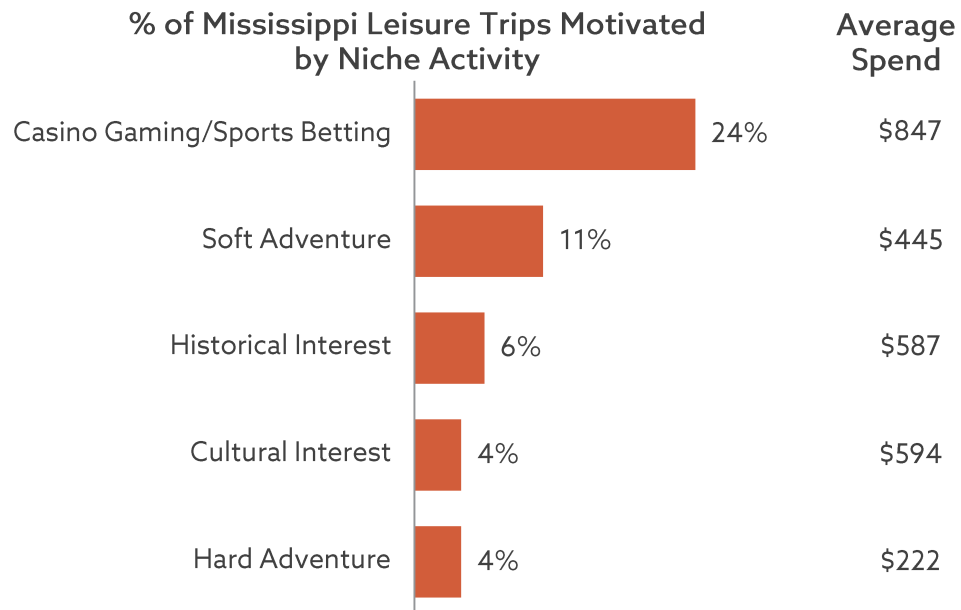
Hard Adventure

- 4% of leisure visitors
- Younger – average age 38
- Spend per party/trip: \$222 (lowest)
- Half from MS (52%); 28% touch-state
- 82% stay overnight
- Length of stay: 1.8 nights (shortest)

Note: figures reflect combined FY 2018-FY 2019 data to increase sample size; figures for niche activity categories reflect Mississippi visitors who said an activity within the niche category was a primary/secondary reason for their visit (see glossary for niche category definitions) ; since it is possible for an activity as a primary reason and secondary reason for visiting to fall within different niche categories, some overlap will exist

Niche activities motivate travel and generate spend

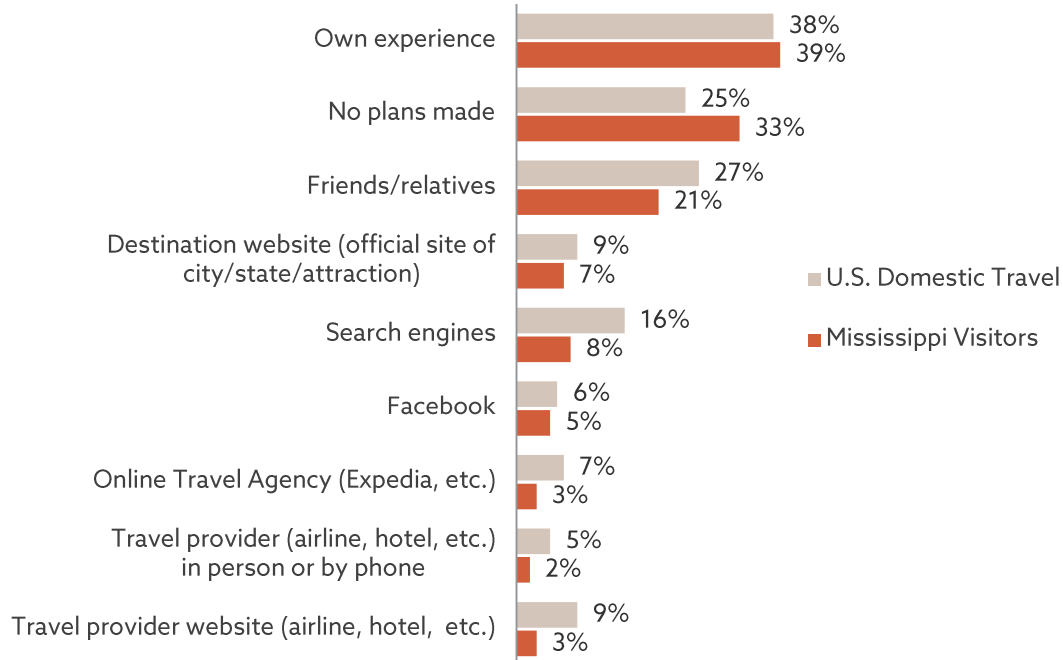
- Casino Gaming and Sports Betting is the niche activity motivating the largest portion of leisure travelers to visit Mississippi. These niche visitors also boast the highest average spend per trip.
- Cultural Interest niche visitors have the second highest average trip spend, followed closely by Historical Interest visitors.
- Combining trip volume with spending provides a guide to help determine the most lucrative niche segment. This model indicates the Casino Gaming/Sports Betting niche is the most lucrative visitor segment for Mississippi, followed by the Soft Adventure and Historic Interest niche groups.



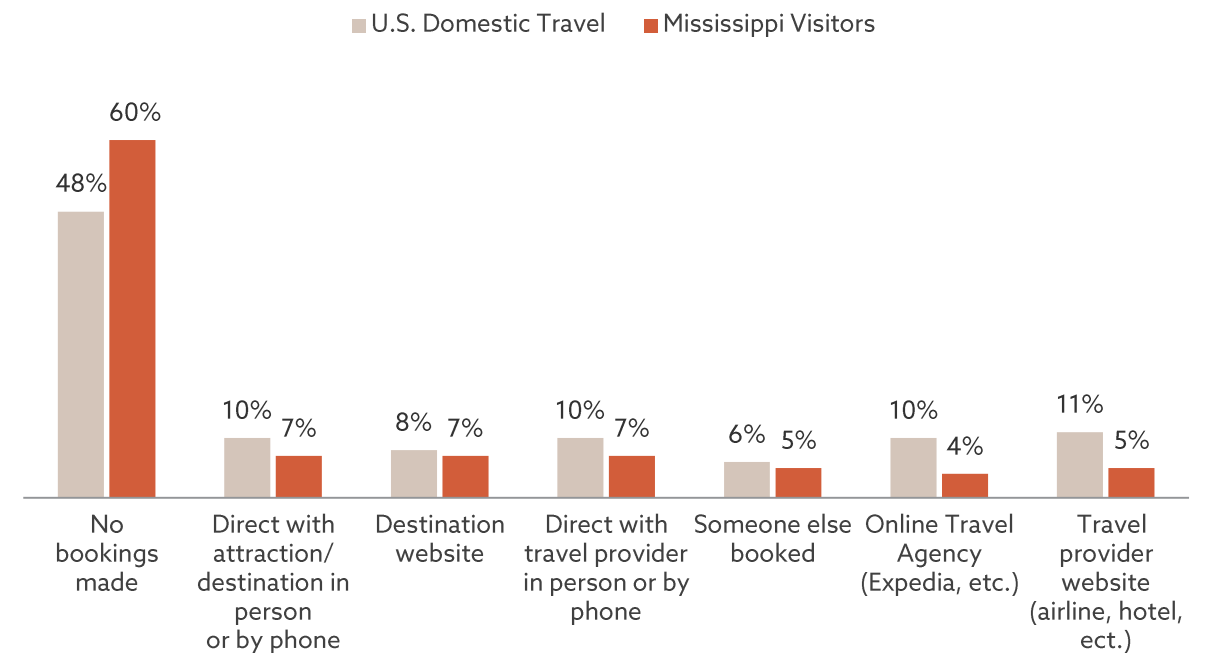
How they plan and book their Mississippi trip

- Mississippi visitors still rely heavily on their own experience to plan their trip, although advice from people they know is also important.
- Most Mississippi visitors made no bookings for their trip (60%), but those that did mostly did so directly with the attraction/destination (7%), via a destination website (7%) or directly with a travel provider (7%).

Top Trip Planning Sources



Top Trip Booking Methods



Mississippi's competitive position and assessment

Southerners Stay in the South:

- Proximity plays a substantial role. Of competitive destinations chosen by Mississippi visitors, the top six states are in the South.
- Mississippi visitors most often choose adjoining and nearby states as competitors, specifically: Alabama (51%), Florida (44%), Tennessee (41%), and Louisiana (37%). For future Mississippi trips, markets in touch-states and Texas top the list, including New Orleans, Memphis, Birmingham, Houston, Dallas/Ft. Worth, and Mobile-Pensacola-Ft. Walton Beach.

Assessment:

- Mississippi appeals to travelers within its borders, in touch-states, and states farther away. Nearly three-fourths (73%) of visitors live within Mississippi or a touch-state (39% and 34%, respectively). Visitors have easy access (92% drive), can decide on a trip quickly, and can visit frequently. In fact, nearly three-fourths (73%) of Mississippi's visitors have visited three or more times over the past 5 years and 17% have visited 1-2 times in the past five years. The relative proximity that visitors to Mississippi travel from allows for flexibility in marketing efforts and development of quick promotions to entice travel to the state.
- Niche activities motivate vacation travel and generate revenue. Niche segments provide a guide for growth opportunities and realities. Adding visitors in the most lucrative niche, Casino Gaming/Sports Betting, can provide a boost to Mississippi's average leisure trip spend, but will require focusing on older visitors—as well as younger visitors—and targeting markets in touch-states. Mississippi can also benefit from targeting Soft Adventure niche travelers, the second most lucrative segment in terms of potential value.



SHARE OF VISITORS

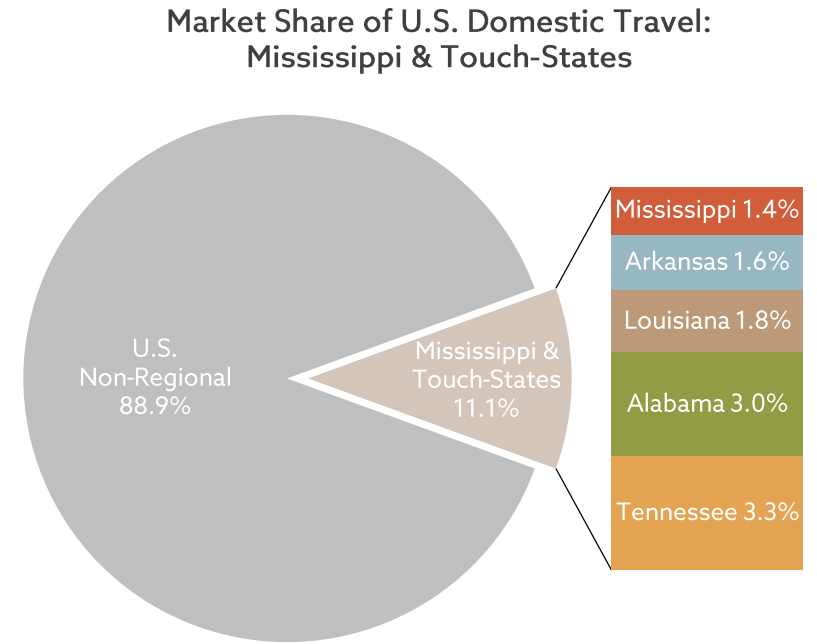
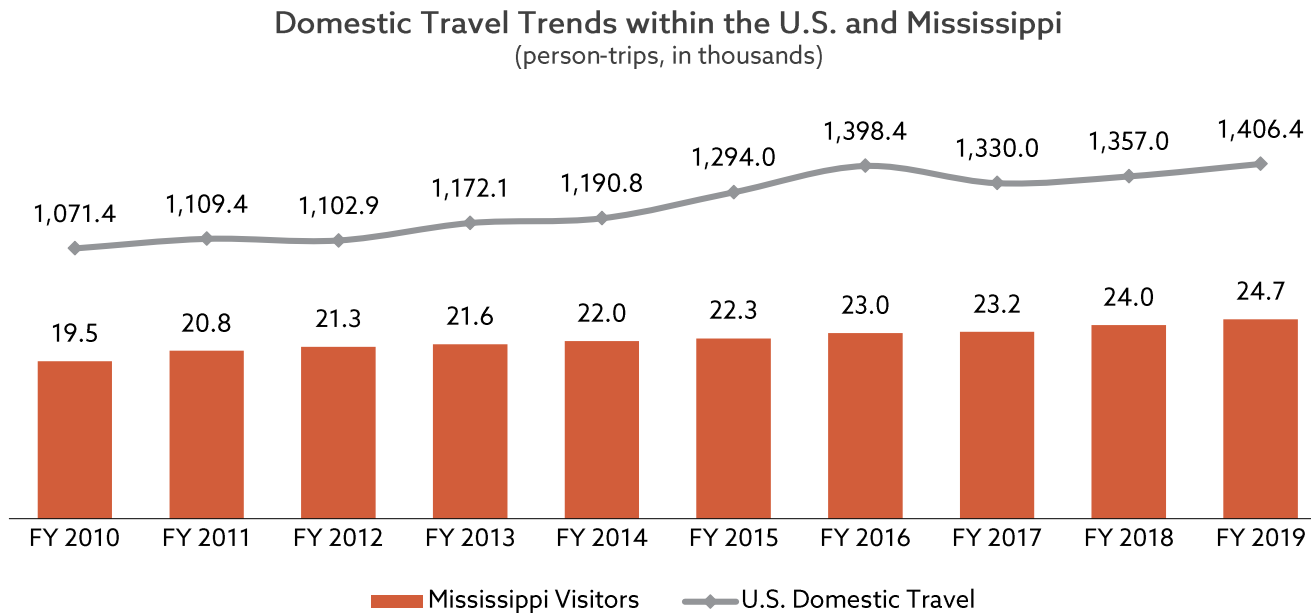


Mississippi welcomed approximately 24.7 million visitors in FY 2019

Market Overview:

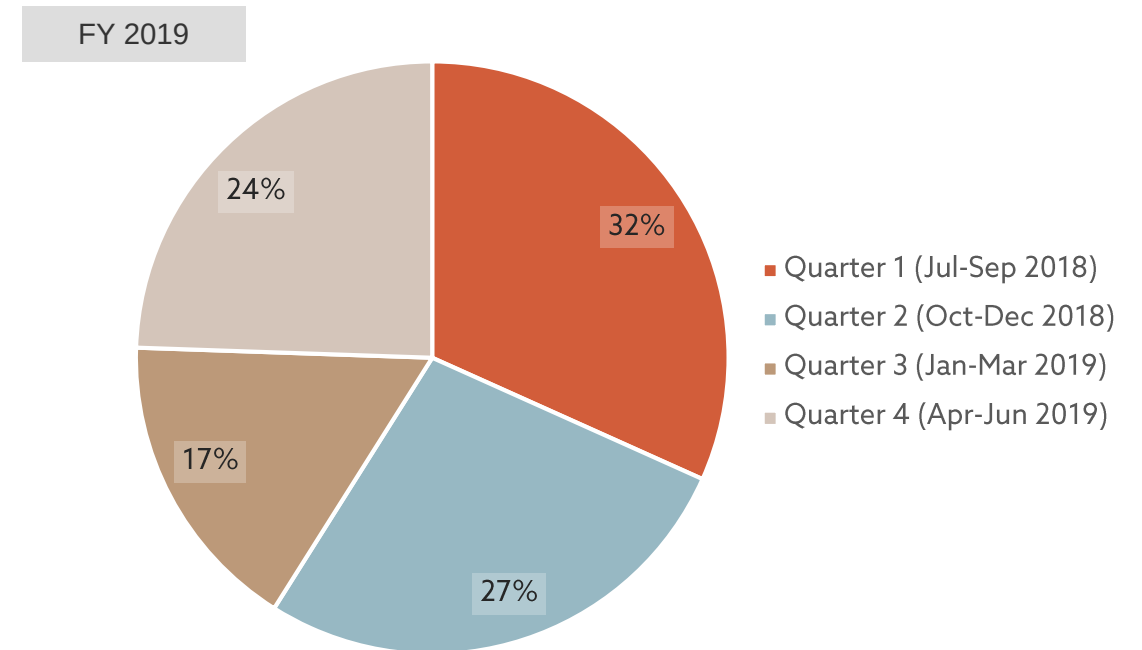
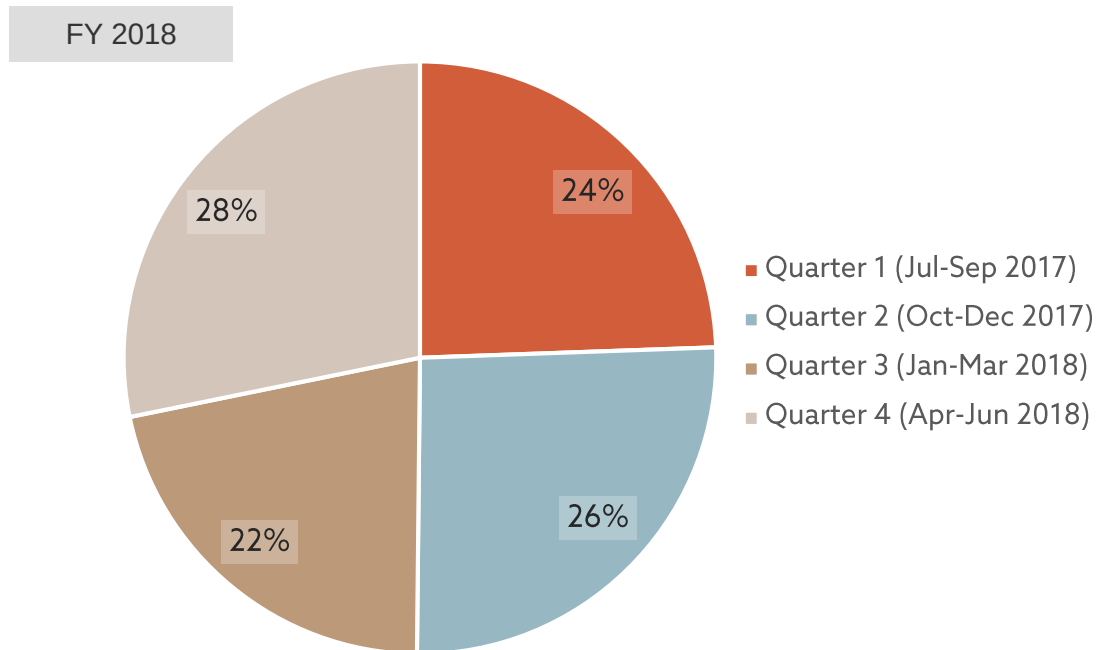
- Mississippi visitation reached 24.7 million in FY 2019, an increase of 2.9% from the previous fiscal year.
- Travel to Mississippi accounted for 1.4% of total U.S. domestic travel in FY 2019.
- In FY 2019, the ratio of Mississippi visitors to the state population was 8.3.

Mississippi Population Census Estimate	Mississippi Households Census Estimate	Mississippi Visitors FY 2019
2,976,149	1,105,576	24.7 million



First quarter visitation increases, providing the largest portion of visitor volume in FY 2019, while the third quarter remains the smallest contributor

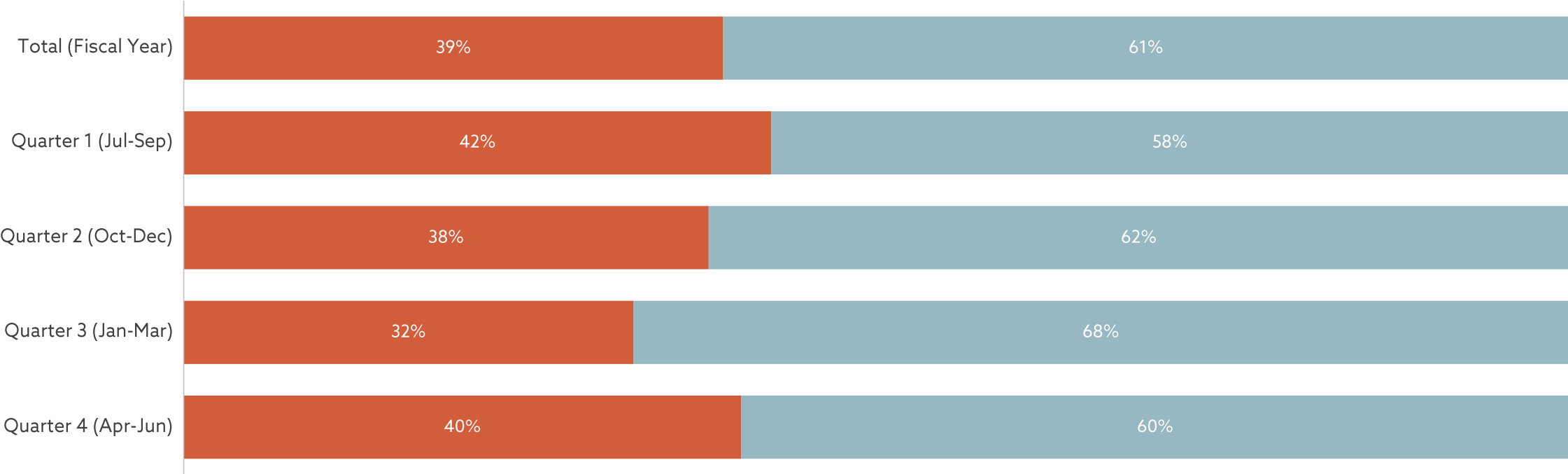
Mississippi Visitors by Quarter
(in person-trips)



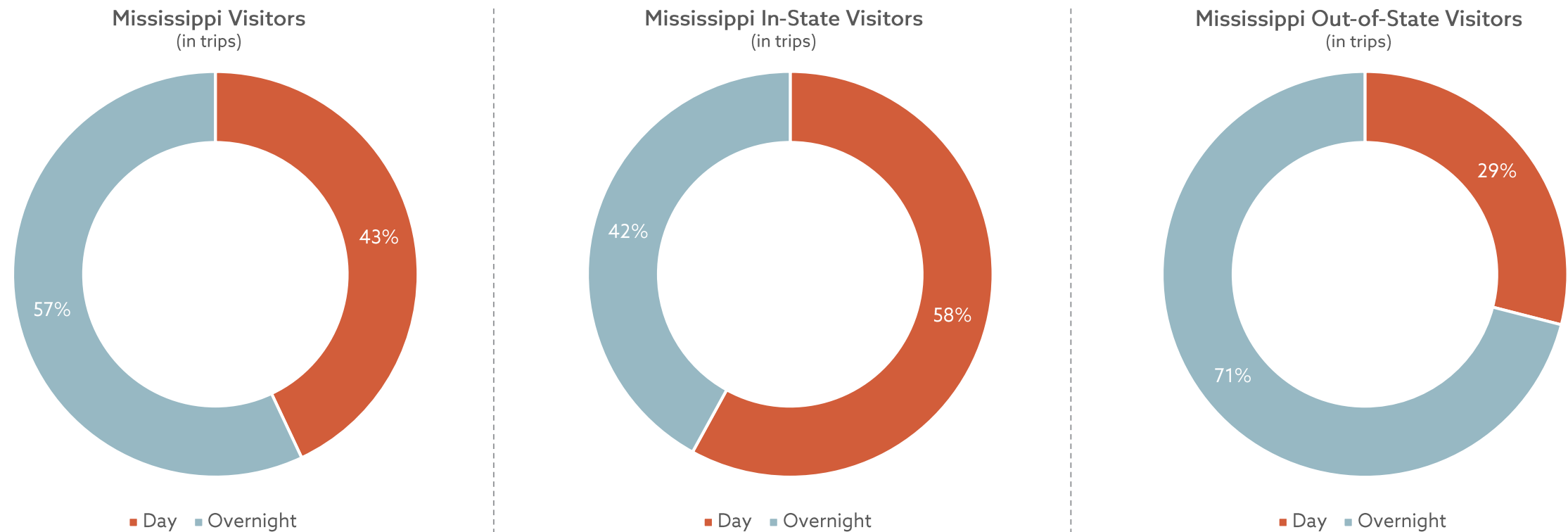
Out-of-State visitors continue to outnumber in-state visitors during each quarter of the fiscal year

Source of Mississippi Visitors by Quarter
(reflects person-trips)

In-State Visitor Out-of-State Visitor



Overnight trips remain the most common trip type, especially among Mississippi out-of-state visitors



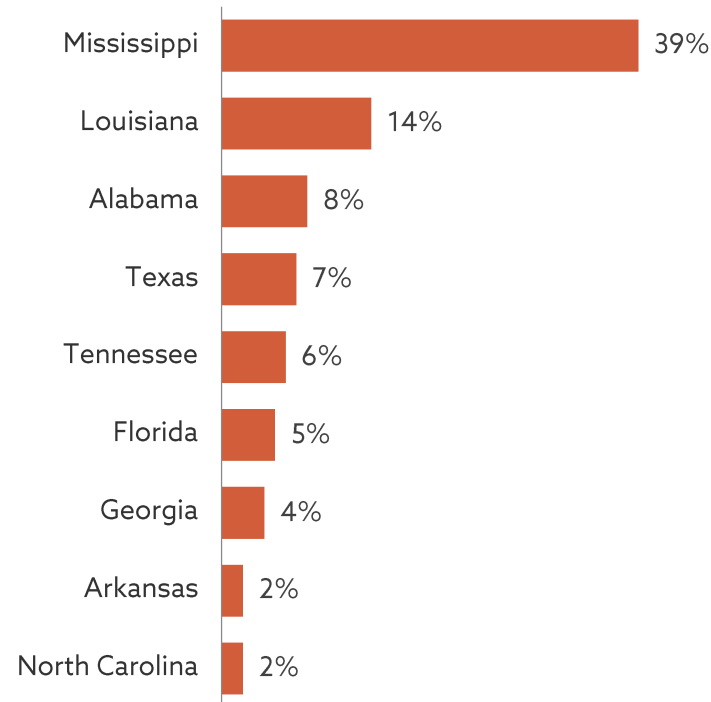
SOURCE MARKETS AND TRIP TYPES



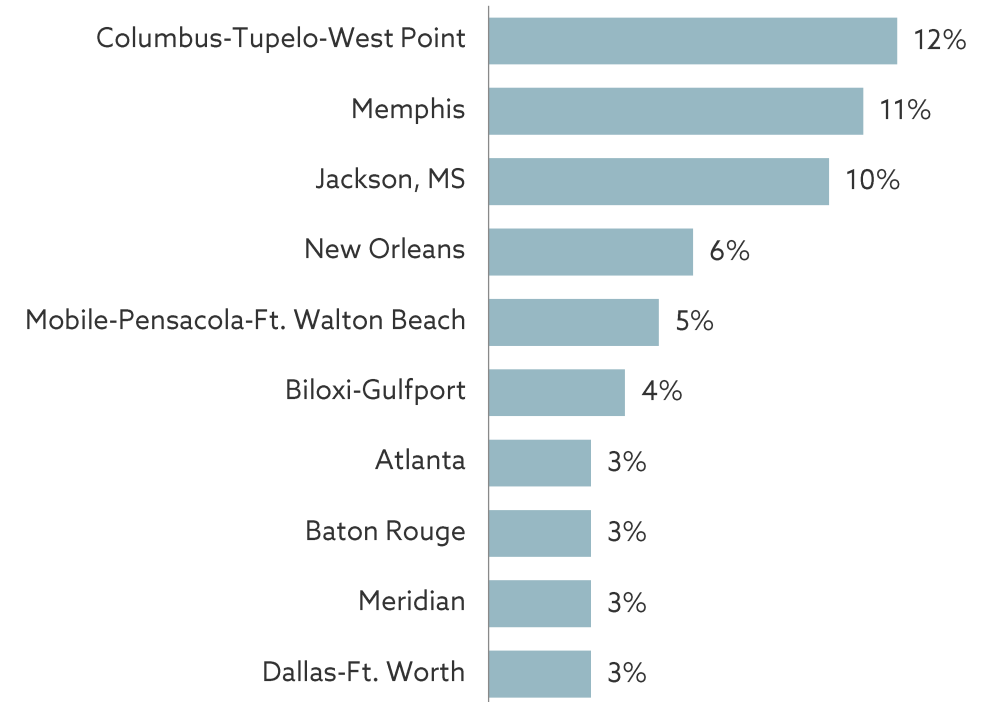
Proximity influences travel, as touch-states and their respective cities continue to dominate out-of-state visitor source markets

- Mississippi benefited from a larger portion of its residents traveling in the state than in past years, with nearly three-fourths of visitors residing within the state of Mississippi or a touch-state.

Top Origin States of Mississippi Visitors
(in person-trips)



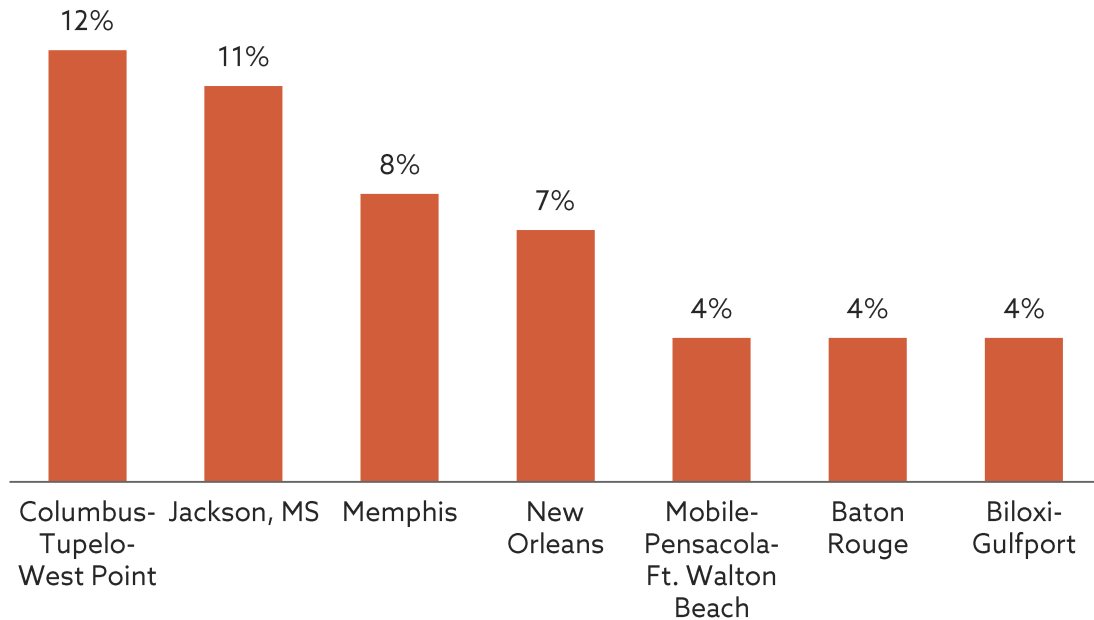
Top Origin DMAs of Mississippi Visitors
(in person-trips)



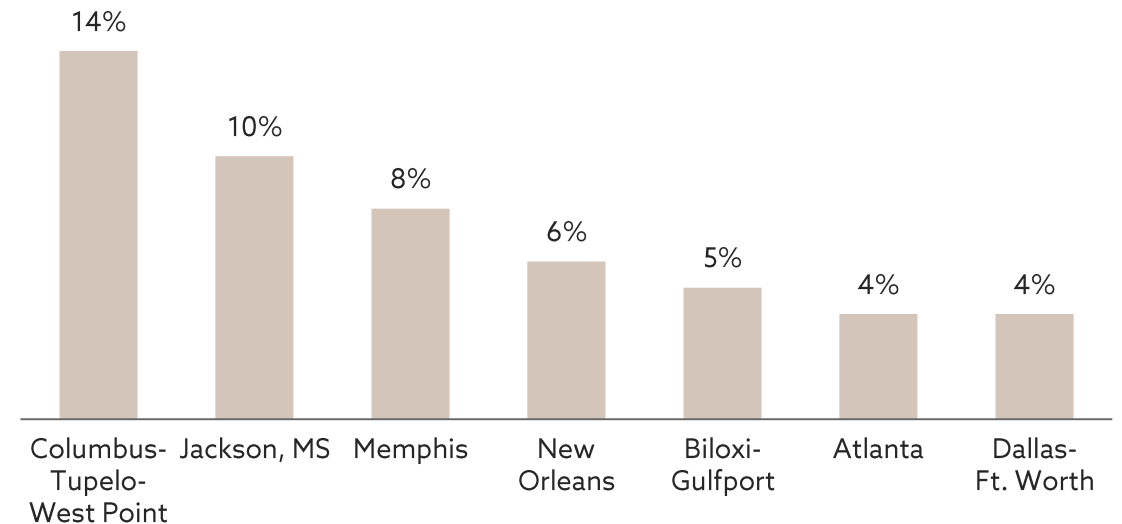
Distance matters, again, among leisure travelers, as well as having friends/family in nearby proximity

- DMAs in-state and within touch-states provide the most leisure visitors, especially the Mississippi DMAs of Jackson and Columbus-Tupelo-West Point and the touch-state markets of Memphis, New Orleans and Mobile-Pensacola-Ft. Walton Beach.

Top Origin Markets of Mississippi Visitors whose Primary Purpose for Traveling was Leisure
(reflects primary purpose; person-trips)



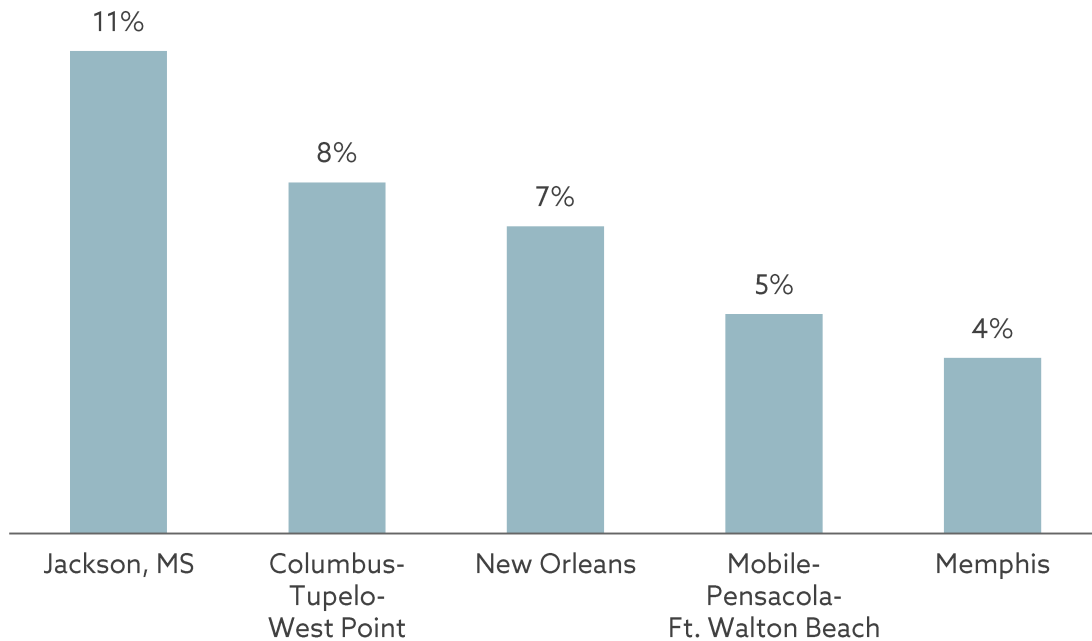
Top Origin Markets of Mississippi Visitors whose Purpose Included Visiting Friends/Relatives
(reflects all purposes; person-trips)



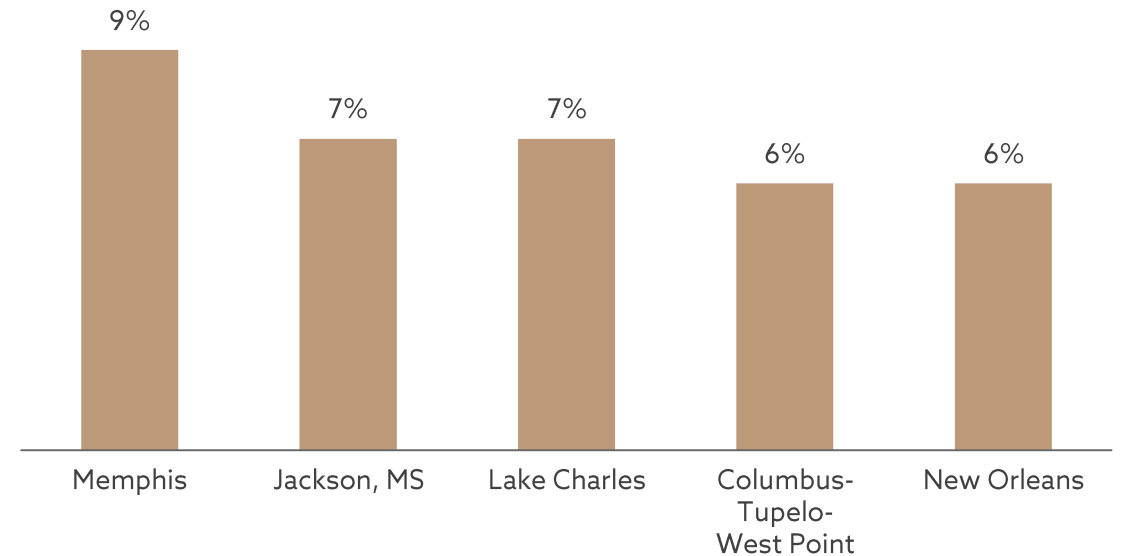
Travelers from different origin markets seek different leisure experiences

- Most Mississippi visitors traveling for entertainment/sightseeing originate from Jackson, Columbus-Tupelo-West Point, New Orleans, Mobile-Pensacola-Ft. Walton Beach and Memphis, while those traveling for outdoor recreation mostly originate from New Orleans, Memphis, Meridian and Columbus-Tupelo-West Point

Top Origin Markets of Mississippi Visitors whose Purpose Included Entertainment/Sightseeing
(reflects all purposes; person-trips)



Top Origin Markets of Mississippi Visitors whose Purpose Included Outdoor Recreation
(reflects all purposes; person-trips)



PLANNING AND BOOKING



Distance also impacts timing

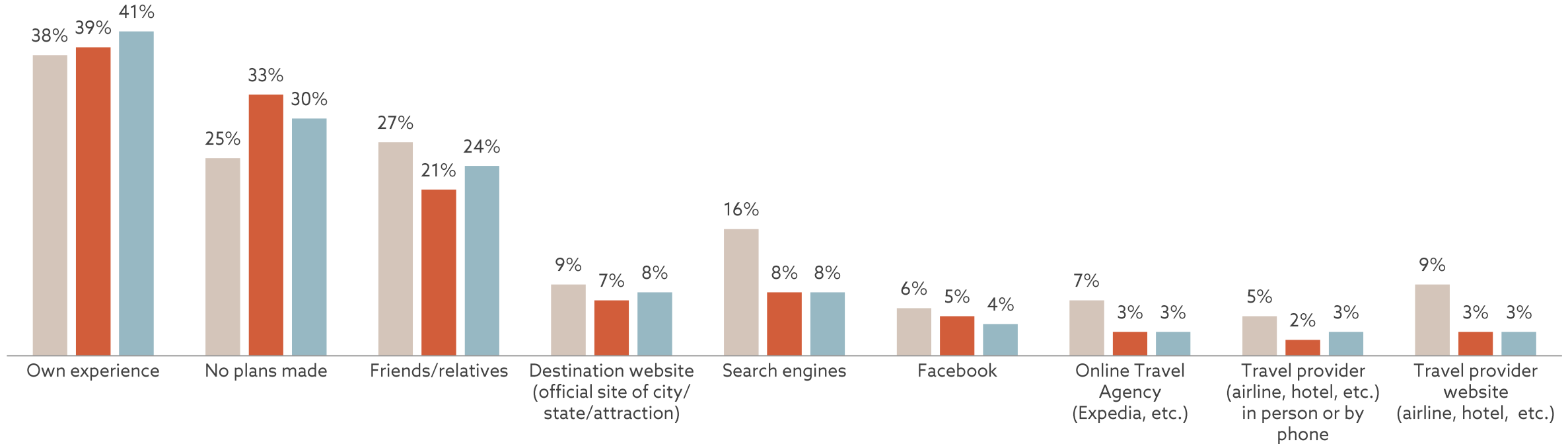
- Mississippi visitor's consideration and decision windows narrowed in FY 2019, likely due to the state's share of in-state visitors experiencing a boost and in-state visitors (often day trips) having shorter timing windows than average travelers.
- More than half of Mississippi visitors decided on their trip within a few weeks of their travel, a shorter time frame than in the past and compared with overall U.S. domestic travel.

Trip Decision Timing	U.S. Domestic Travel		Mississippi Visitors		Mississippi In-State Visitors		Mississippi Out-of-State Visitors		Mississippi Leisure Overnight Visitors		Mississippi Leisure Day Visitors	
	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019
Considered												
Less than 2 weeks before visit	32%	34%	35%	47%	42%	69%	31%	28%	26%	34%	48%	66%
2 – 4 weeks before visit	17%	18%	19%	13%	14%	10%	23%	16%	21%	15%	21%	11%
1 – 3 months before visit	20%	21%	22%	21%	26%	10%	19%	30%	28%	27%	12%	12%
3 – 6 months before visit	15%	14%	12%	10%	10%	5%	14%	15%	12%	13%	12%	6%
6+ months before visit	20%	15%	12%	9%	8%	6%	14%	11%	14%	11%	7%	6%
Decided												
Less than 2 weeks before visit	40%	38%	43%	52%	52%	74%	38%	32%	34%	37%	56%	75%
2 – 4 weeks before visit	18%	19%	22%	14%	17%	9%	25%	18%	27%	19%	19%	6%
1 – 3 months before visit	19%	21%	18%	18%	18%	7%	18%	28%	23%	25%	8%	12%
3 – 6 months before visit	12%	13%	9%	10%	8%	6%	9%	14%	7%	13%	12%	3%
6+ months before visit	13%	12%	8%	5%	5%	3%	10%	7%	9%	7%	5%	3%

Travelers rely on experience to plan travel, but advice from people they know and trust remain important

Top Information Sources Used to Plan by Segment

■ U.S. Domestic Travel ■ Mississippi Visitors ■ Mississippi Leisure Visitors

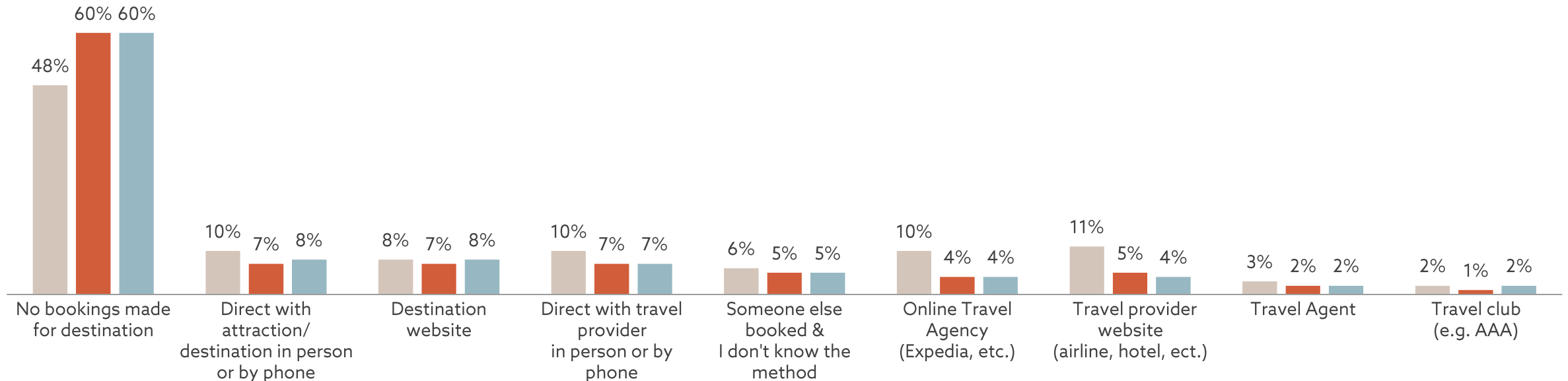


More than half of Mississippi visitors made no travel bookings

- Compared to U.S. domestic travel, Mississippi visitors are less likely to book travel components and those that do, are also less likely to book through an online travel agency (10% vs 4%) or travel provider website (11% vs 5%)

Top Booking Method for Trip Components by Segment

■ U.S. Domestic Travel ■ Mississippi Visitors ■ Mississippi Leisure Visitors

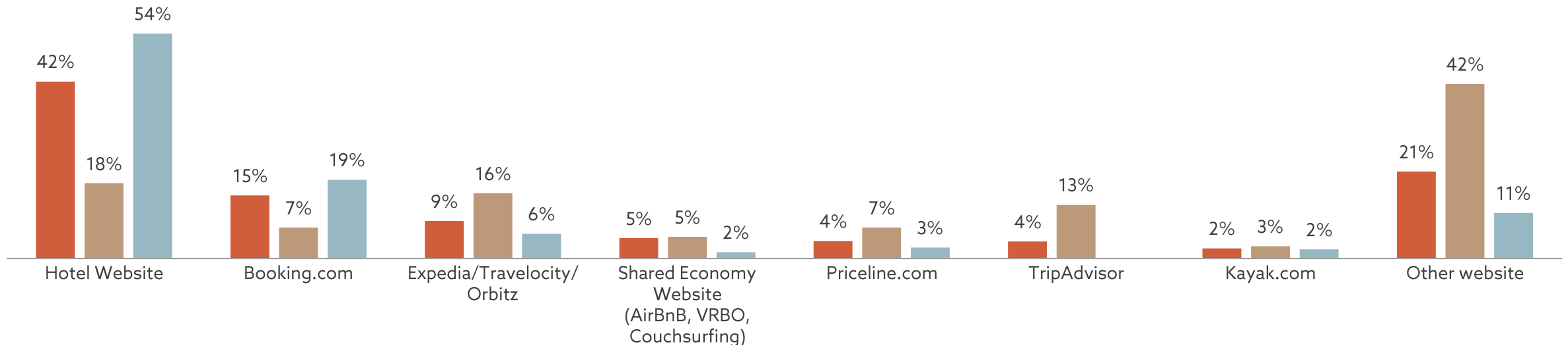


Mississippi visitors most often book accommodations through a hotel website

- Mississippi's out-of-state visitors are much more likely to book their accommodations through a hotel website than in-state visitors.
- In terms of third-party websites, Booking.com is the top website used by Mississippi's out-of-state visitors, while in-state visitors most often turned to Expedia/Travelocity/Orbitz and TripAdvisor.

Top Websites for Booking Mississippi Accommodations**

■ Mississippi Visitors ■ Mississippi In-State Visitors ■ Mississippi Out-of-State Visitors



TRIP CHARACTERISTICS



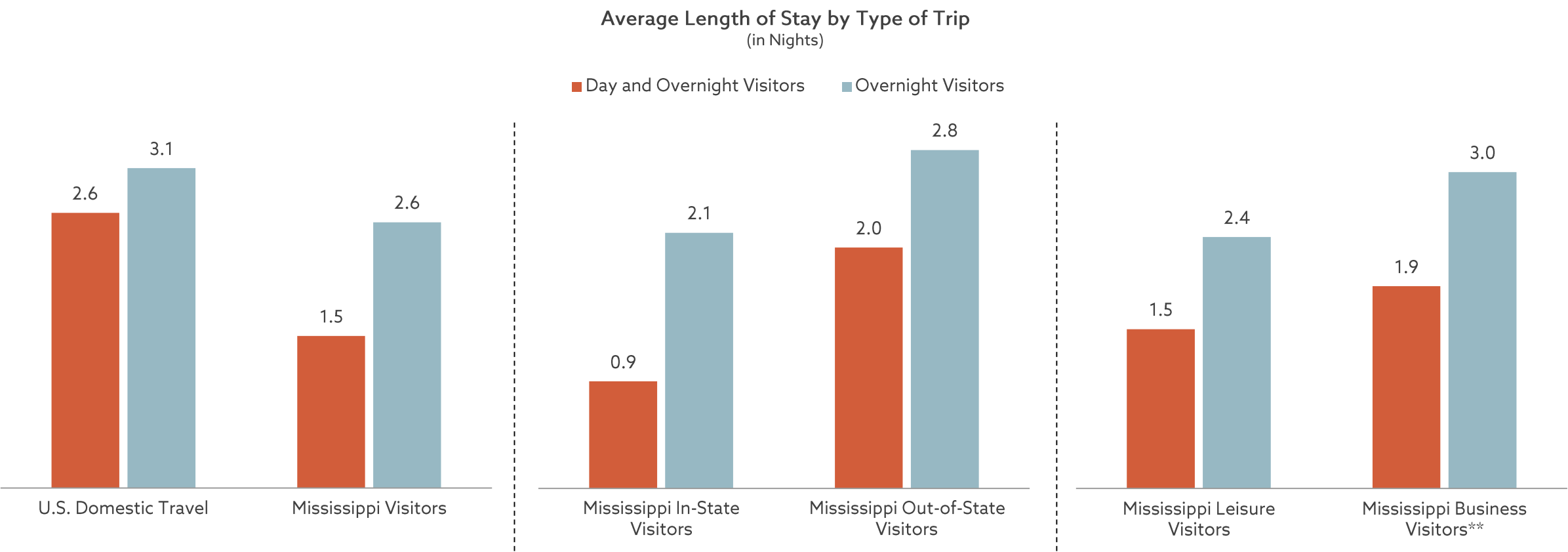
Mississippi visitors mostly travel for fun and nine in ten drive to their destination

- Personal relationships (40%) among Mississippi visitors' top other reasons for leisure travel.
- With most Mississippi visitors living in-state or in a neighbor state, most (88%) drive to their destination(s).

	U.S. Domestic Travel		Mississippi Visitors		Mississippi In-State Visitors		Mississippi Out-of-State Visitors		Mississippi Overnight Visitors		Mississippi Day Visitors	
	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019
Primary Trip Purpose												
Leisure (net)	81%	81%	79%	82%	70%	75%	84%	88%	80%	91%	76%	70%
Visit Friends/Relatives	43%	43%	39%	40%	34%	41%	41%	39%	41%	50%	33%	26%
Outdoor Recreation	9%	9%	5%	6%	5%	4%	5%	7%	6%	6%	4%	6%
Entertainment/Sightseeing	14%	14%	16%	13%	18%	8%	15%	18%	13%	15%	22%	11%
Other Personal	15%	15%	19%	23%	13%	21%	22%	25%	20%	19%	17%	27%
Personal Business	7%	8%	9%	10%	14%	15%	6%	5%	8%	3%	11%	20%
Business	10%	9%	9%	5%	13%	5%	7%	5%	9%	5%	10%	4%
Other	3%	3%	3%	4%	3%	6%	3%	2%	3%	1%	3%	7%
Primary Transportation Mode												
Own Car/Truck	75%	74%	86%	88%	92%	96%	83%	80%	86%	85%	86%	91%
Rental Vehicle	13%	13%	4%	4%	1%	0%	5%	8%	5%	5%	2%	4%
Air Travel	5%	6%	5%	3%	5%	1%	5%	6%	5%	5%	5%	1%
Other	7%	7%	5%	5%	2%	3%	7%	7%	4%	5%	7%	4%

Out-of-state visitors stay longer in Mississippi on average, than in-state visitors

- Although business visitor's stay somewhat longer than leisure visitors, they only represent five percent of Mississippi's total visitors.



Mississippi visitors often travel with children and in travel parties with two adults, helping to boost average travel party size

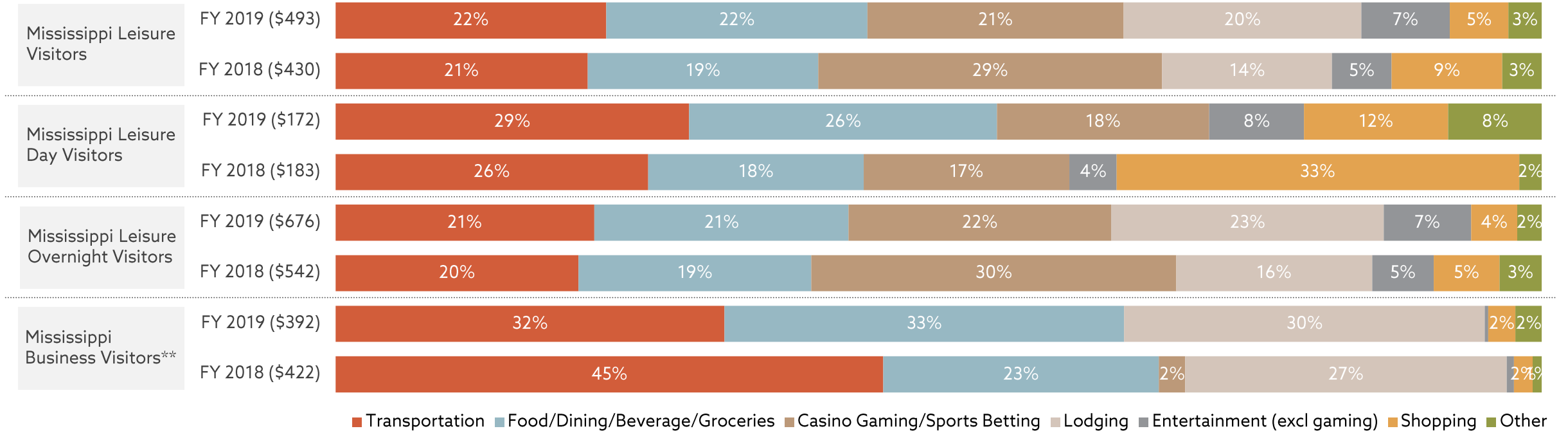
- Mississippi also experienced a boost in the average travel party size of both day trippers and overnight visitors.

	U.S. Domestic Travel		Mississippi Visitors		Mississippi Leisure Visitors		Mississippi Business Visitors**		Mississippi In-State Visitors		Mississippi Out-of-State Visitors		Mississippi Overnight Visitors		Mississippi Day Visitors	
	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019
Average Travel Party Size	2.6	2.6	2.5	2.8	2.6	2.8	1.6	2.0	2.4	2.6	2.6	2.6	2.5	2.8	2.6	2.8
Adults in Travel Party																
One Adult	29%	30%	28%	24%	25%	22%	64%	56%	24%	28%	30%	20%	29%	22%	25%	27%
Two Adults	54%	54%	56%	58%	58%	61%	32%	25%	60%	53%	55%	62%	57%	57%	55%	58%
Three Adults	9%	8%	10%	10%	11%	10%	1%	2%	14%	11%	8%	8%	9%	13%	12%	5%
Four or More Adults	8%	7%	6%	9%	7%	7%	4%	17%	3%	7%	8%	10%	5%	8%	8%	10%
Family Travel																
Travel with Children	28%	32%	25%	34%	27%	36%	7%	12%	20%	31%	28%	37%	25%	33%	24%	36%
Average Children	1.9	1.9	1.8	2.0	1.8	1.9	1.9	1.4	2.0	1.7	1.9	1.9	1.8	2.0	1.8	1.9
Travel with Children from Household	25%	28%	22%	28%	24%	30%	7%	7%	16%	26%	25%	29%	21%	27%	24%	29%
Average Children from Household	1.7	1.7	1.7	1.9	1.7	1.9	1.9	1.7	1.8	1.7	1.7	1.7	1.7	1.9	1.7	1.9

Mississippi benefited from an increase in leisure visitor spending

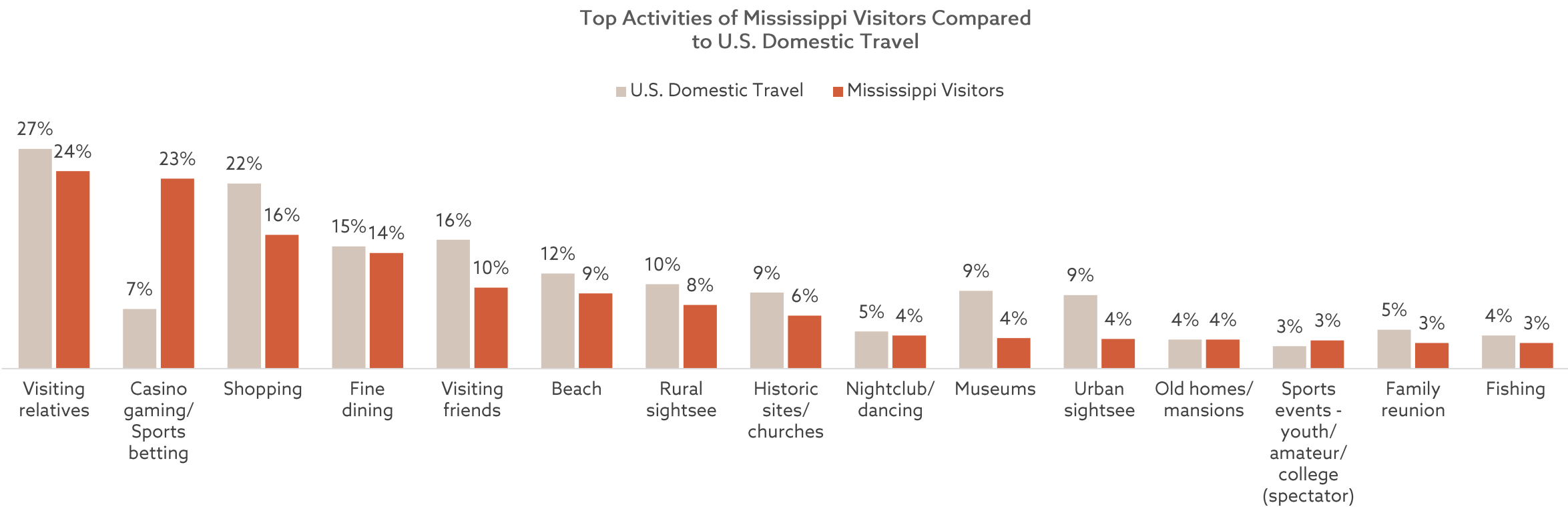
- Compared to a year ago, Mississippi leisure visitors spent 15 percent more on average, at the same time business travel spending slipped.
- Among those traveling to Mississippi for leisure, overnight visitors spent on their trip to the state than the previous year and were responsible for the overall increase in leisure spend.

Average Spend for Mississippi Trip by Type of Trip
Total Spending by Travel Party (including 0)



Casino gaming and sports betting is enjoyed by Mississippi visitors, regardless of whether it was the reason motivating their trip

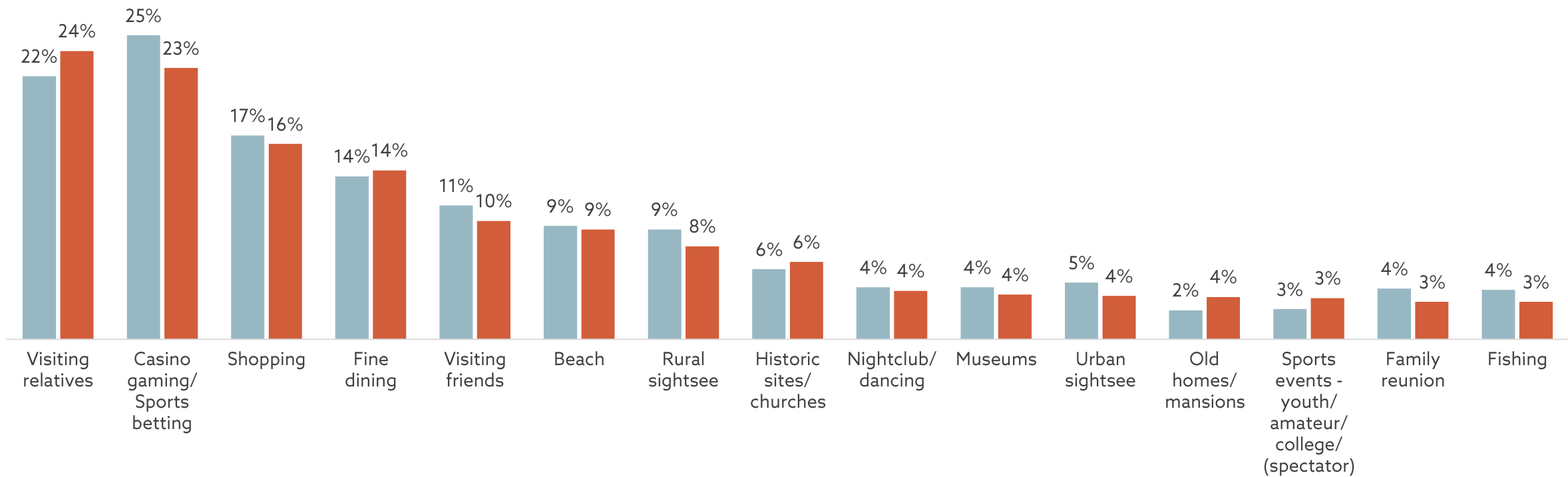
- Significantly more Mississippi visitors enjoy casino gaming/sports betting than U.S. domestic travelers, while fewer spend time on activities popular with all U.S. domestic travelers including, going to the beach, visiting historic sites/churches, rural sightseeing and museums.



Casino gaming and sports betting remains important, despite a slight dip in the proportion of Mississippi visitors choosing to participate

Top Activity Participation by Mississippi Visitors

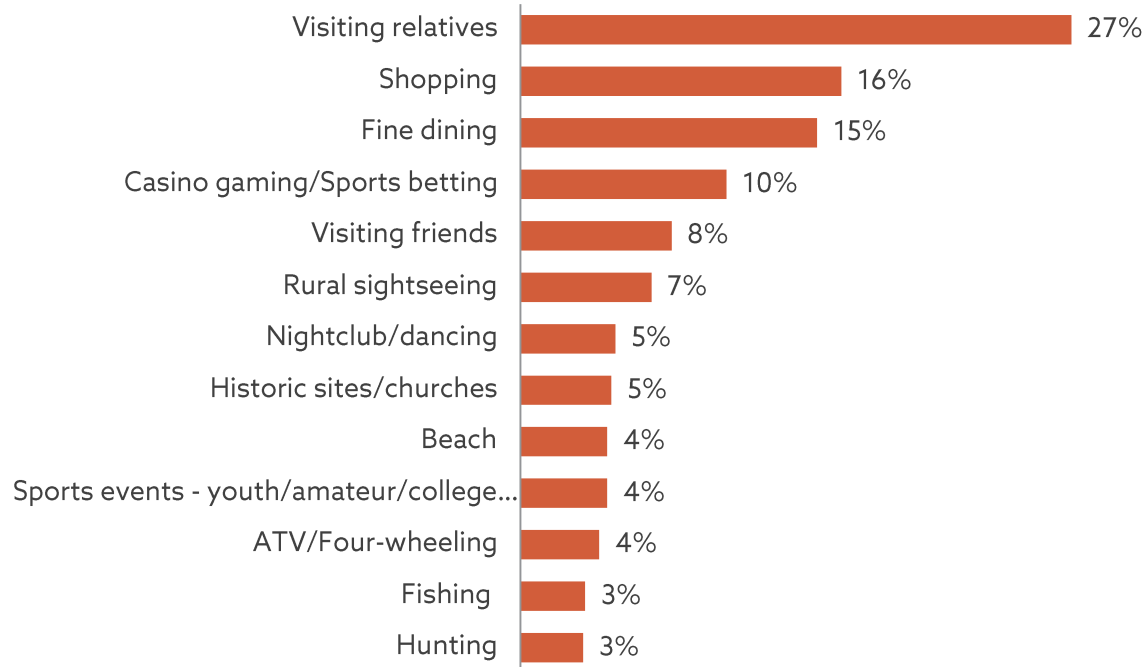
FY 2018 FY 2019



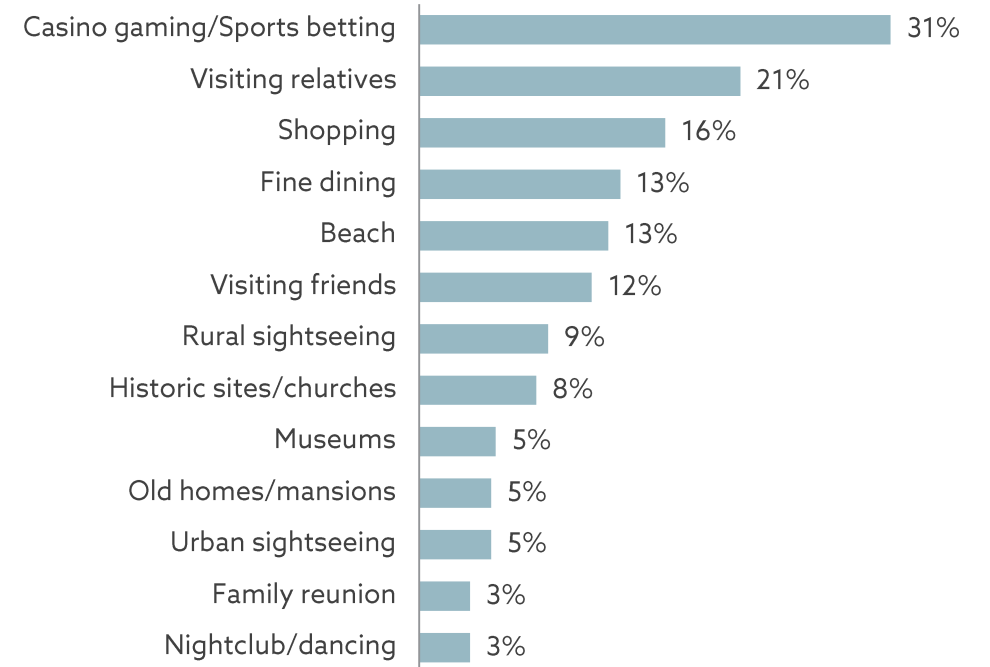
In-state and out-of-state visitors enjoy different activities

- Far more of Mississippi's out-of-state visitors participate in casino gaming/sports betting than in-state visitors.
- Out-of-state visitors are also more likely to visit with friends/family, enjoy the beach, go to historic sites/churches, sightsee and shop, while in-state visitors are more likely to enjoy fine dining, ATV/four-wheeling and farms/ranches/agri-tours.

Top Activity Participation of Mississippi In-State Visitors



Top Activity Participation of Mississippi Out-of-State Visitors



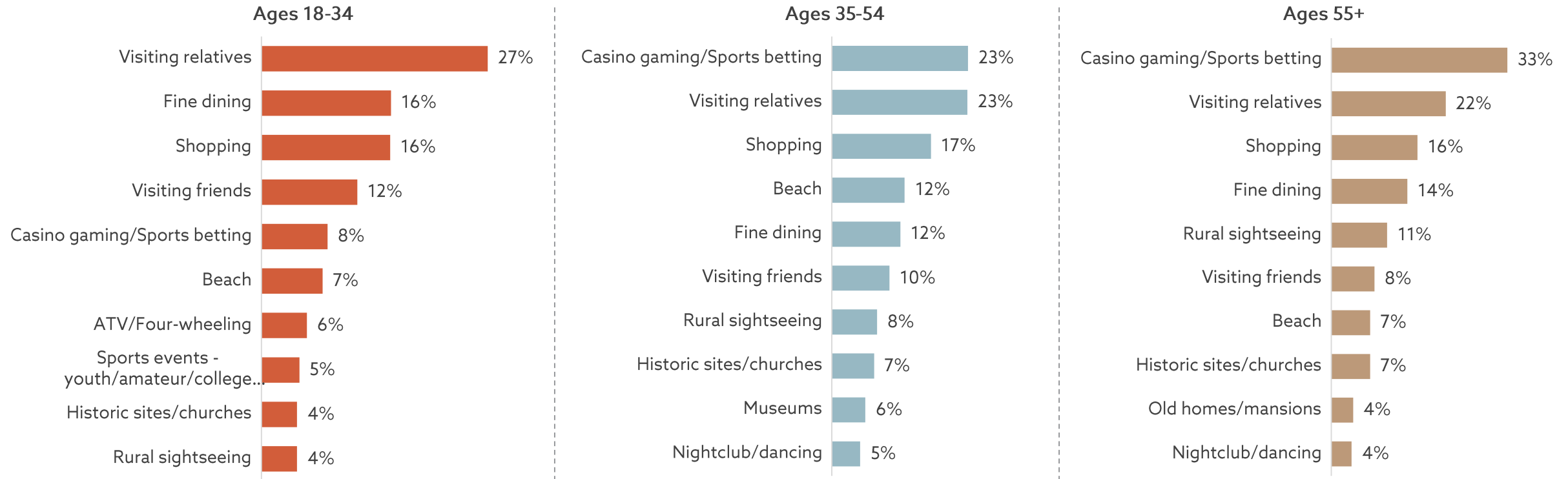
ACTIVITIES BY AGE



Casino gaming and sports betting most popular among Boomers

- Mississippi's visitors of the Baby Boomer generation are most likely to participate in casino gaming/sports betting, but participation erodes with each subsequent generation.
- Gen Xers and the younger generations focus more on shopping, family and, more recently, fine dining. Gen X visitors also enjoy visiting Mississippi beaches.

Top Activity Participation Among Mississippi Visitors by Age Group





NICHE VACATION
MOTIVATIONS

Niche activities can be the reason motivating travel to Mississippi, particularly the Casino Gaming and Sports Betting niche

Visitor characteristics vary between the niche activities motivating travel:

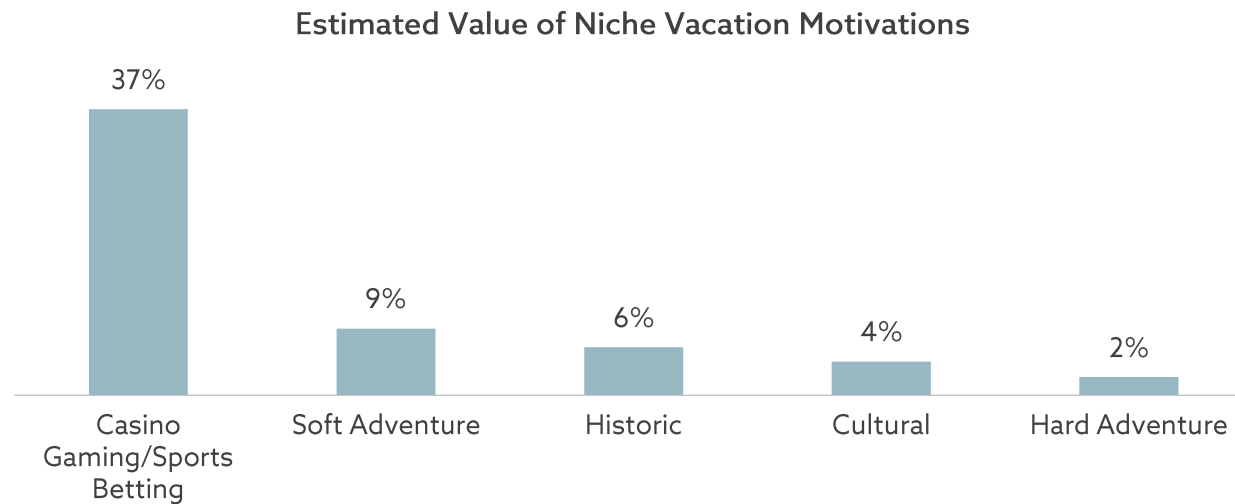
- Soft Adventurer: longest average stay
- Cultural Interest: highest proportion of African-Americans
- Hard Adventurer: youngest, primarily residents, shortest stay
- Historic Interest: highest African-American, somewhat younger
- Casino Gaming/Sports Betting: older, highest spending, relatively long stays, highest proportion of overnight trips, primarily non-residents

	Mississippi Leisure Visitors	Mississippi Leisure Visitors with Niche Activity as Primary/Secondary Trip Motivation:				
		Casino Gaming/ Sports Betting	Soft Adventure	Historic Interest	Cultural Interest	Hard Adventure
% of Leisure Trips:	100%	24%	11%	6%	4%	4%
Demographics:						
Average Age	47	56	48	47	47	38
Average Household Income	\$70,700	\$76,000	\$72,200	\$77,200	\$77,200	68,800
Caucasian	82%	85%	86%	82%	74%	85%
Black/African-American	16%	11%	11%	12%	19%	11%
Mississippi Resident	44%	16%	36%	32%	42%	52%
Touch-State Resident (excl. Mississippi)	33%	48%	36%	26%	31%	28%
Trip Characteristics:						
Stayed Overnight in Mississippi	64%	83%	71%	71%	67%	82%
Average Nights (if any)	1.5	2.2	2.3	1.9	1.9	1.8
Average Spend Per Trip (incl 0)	\$493	\$847	\$445	\$587	\$594	\$222

Vacation activity niche value

The most lucrative segments:

- Casino Gaming and Sports Betting continues to hold a substantial lead in terms of potential value – the large percentage of visitors (prior slide) is enhanced further by above average spending from this older demographic
- Historic Interest and Cultural Interest travelers also receive a boost from high spending levels, while Soft Adventure traveler's potential is a result of the number of potential trips, since average spend per trip among this segment is lower than average leisure trips spend.



Estimated value reflects the proportion of potential spend developed by using the proportion that each segment comprises of leisure travelers, multiplied by the average spending per segment. Figures in the chart represent the potential amount each niche contributes to total leisure travel spending in Mississippi

DEMOGRAPHICS



Demographics of Mississippi visitors vary from overall U.S. domestic travelers

- Mississippi visitors report lower average incomes, are more likely African-Americans, and are more likely to be retired than U.S. domestic travelers.
- Out-of-state visitors, compared to in-state visitors, are younger and more affluent on average, as well as more likely to have children in their household and be employed.

	U.S. Domestic Travel		Mississippi Visitors		Mississippi In-State Visitors		Mississippi Out-of-State Visitors		Mississippi Overnight Visitors		Mississippi Day Visitors	
	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019
Average Age	46	45	47	47	45	45	48	49	48	48	45	45
Average Household Income	\$88,300	\$87,400	\$77,000	\$69,200	\$65,800	\$58,200	\$83,400	\$79,200	\$81,300	\$76,000	\$68,100	\$60,100
Male	44%	36%	41%	35%	42%	41%	40%	30%	38%	34%	46%	36%
Married	61%	62%	65%	64%	64%	64%	65%	65%	66%	68%	63%	60%
Household Composition												
One Person	15%	14%	13%	17%	10%	17%	14%	17%	13%	15%	12%	20%
Two People	40%	39%	37%	36%	34%	38%	39%	35%	40%	36%	32%	38%
Three or More	45%	48%	50%	47%	55%	46%	47%	48%	47%	50%	56%	43%
Children in Household	36%	38%	38%	35%	36%	33%	40%	37%	38%	35%	38%	35%
Ethnicity/Hispanic												
Caucasian	86%	86%	82%	83%	73%	83%	88%	83%	85%	86%	78%	79%
African-American	6%	6%	14%	14%	22%	16%	10%	13%	12%	11%	18%	20%
Hispanic	8%	8%	2%	3%	0%	1%	3%	5%	2%	3%	1%	3%
Employment												
Employed (full-time or part-time)	65%	65%	61%	62%	58%	67%	63%	58%	62%	63%	60%	62%
Retired	20%	19%	23%	25%	18%	22%	26%	28%	24%	25%	22%	25%

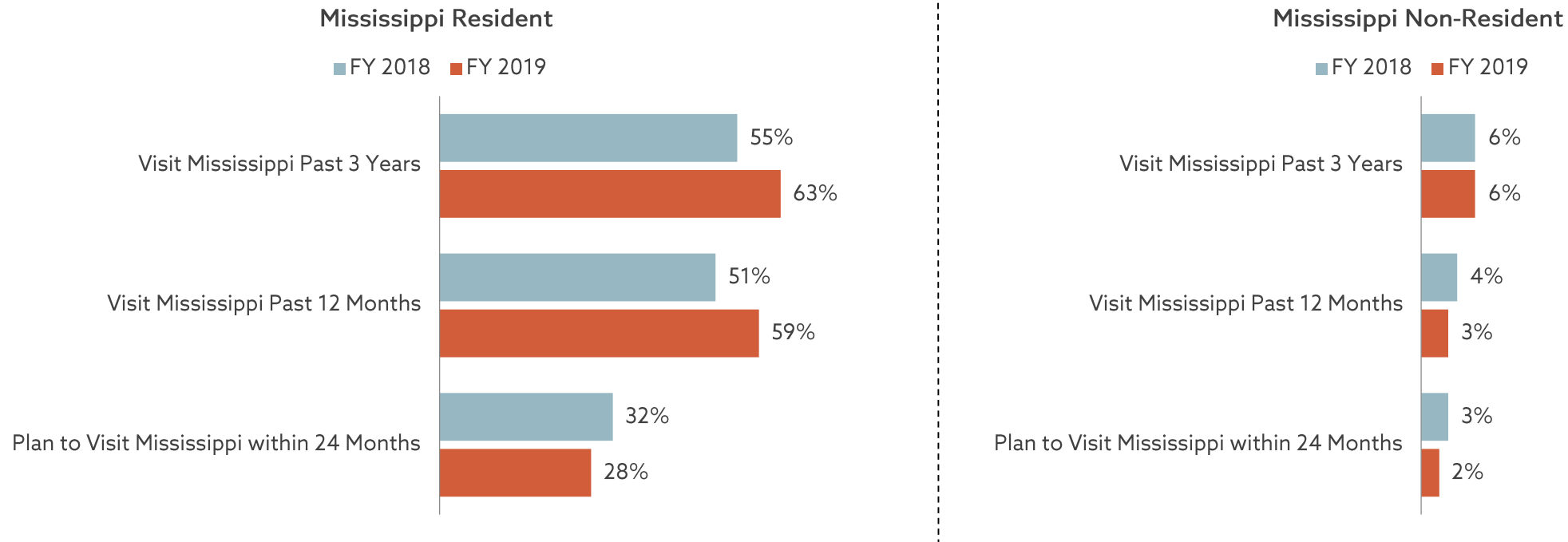
COMPETITIVE ENVIRONMENT



Similar to the past, Mississippi draws a large share of visitors from within

- More than half (59%) of in-state travelers vacationed in Mississippi within the past year and 28 percent of travelers residing in Mississippi indicate plans to travel within the state over the next 24 months.
- Slightly fewer non-residents report traveling to Mississippi within the past year, as well as intentions to do so in the near future.

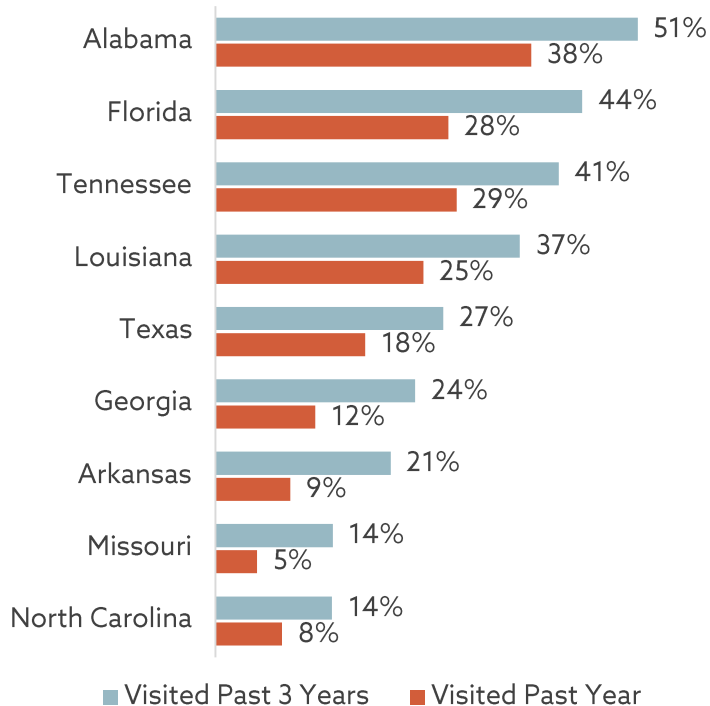
Mississippi Visitation Patterns
(Household Level, All Travelers)



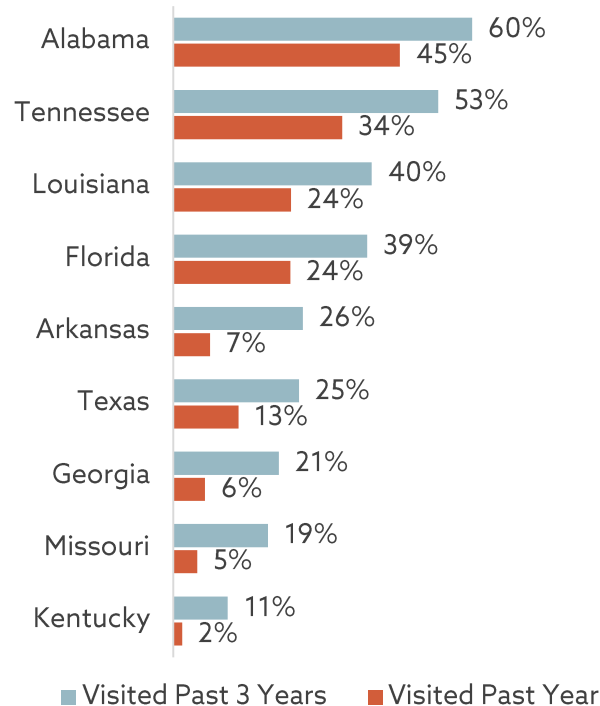
Southern states are Mississippi's strongest competitors for visitors

- The top three other states Mississippi's in-state visitors are drawn to are touch-states, which further highlights proximity matters.
- Among its out-of-state visitors, Mississippi's strongest competitor is Florida, followed by three of its touch-states.

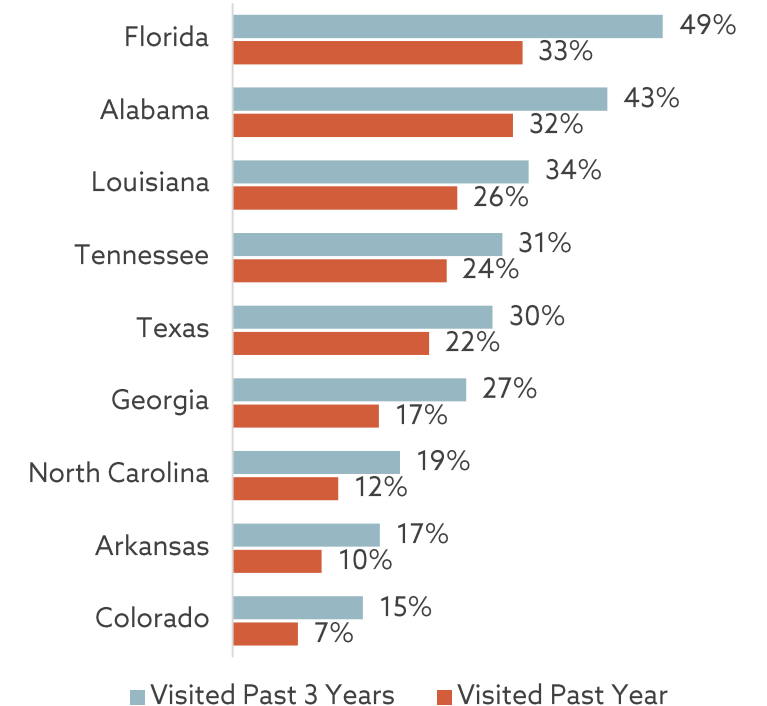
Other States Visited by Mississippi Visitors
(key competitors ranked by visited past 3 years)



Other States Visited by Mississippi In-State Visitors
(key competitors ranked by visited past 3 years)



Other States Visited by Mississippi Out-of-State Visitors
(key competitors ranked by visited past 3 years)

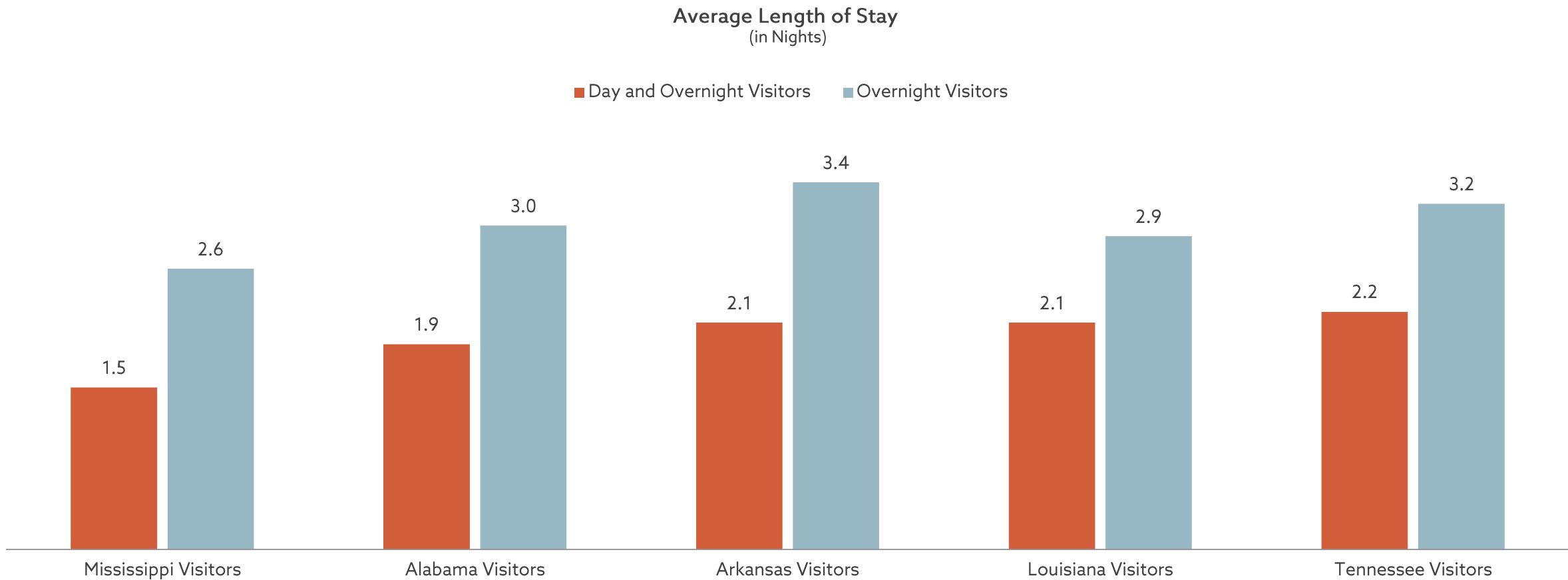


Mississippi benefited from a boost in leisure travelers, bringing its proportion of leisure trips on par with or above touch-states

- Visitors to the state also drive more often than visitors of touch-states, except for Alabama.

	Mississippi Visitors		Alabama Visitors		Arkansas Visitors		Louisiana Visitors		Tennessee Visitors	
	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019
Primary Trip Purpose										
Leisure (net)	79%	82%	77%	81%	79%	72%	80%	82%	80%	81%
Visit Friends/Relatives	39%	40%	44%	46%	45%	35%	35%	44%	37%	38%
Outdoor Recreation	5%	6%	10%	11%	10%	14%	7%	7%	7%	8%
Entertainment/Sightseeing	16%	13%	10%	10%	8%	11%	20%	15%	19%	19%
Other Personal	19%	23%	13%	14%	16%	12%	18%	16%	16%	17%
Personal Business	9%	10%	8%	7%	10%	11%	6%	5%	9%	9%
Business	9%	5%	11%	9%	8%	11%	11%	10%	9%	7%
Other	3%	4%	4%	3%	4%	6%	3%	2%	3%	2%
Primary Transportation Mode										
Own Car/Truck	86%	88%	86%	88%	81%	74%	84%	82%	76%	77%
Air Travel	4%	4%	4%	4%	6%	7%	4%	5%	11%	12%
Rental Car	5%	3%	5%	3%	5%	9%	6%	6%	6%	4%
Other	5%	5%	5%	5%	8%	11%	7%	8%	7%	8%

Mississippi visitors stay fewer nights, on average than visitors to touch-states



Mississippi's average travel party size resembles its touch-states

- Mississippi and nearly all touch-states (Alabama, Louisiana, Tennessee) hosted slightly larger travel parties in FY 2019.
- Mississippi's proportion of travel parties with two adults is nearly on par with Tennessee and greater than Alabama, Arkansas and Louisiana.

	Mississippi Visitors		Alabama Visitors		Arkansas Visitors		Louisiana Visitors		Tennessee Visitors	
	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019
Average Travel Party Size	2.5	2.8	2.6	2.8	2.6	2.5	2.5	2.8	2.7	2.8
Adults in Travel Party										
One Adult	28%	20%	21%	31%	21%	31%	20%	26%	18%	15%
Two Adults	59%	64%	62%	54%	67%	58%	69%	55%	66%	65%
Three Adults	11%	8%	10%	6%	8%	7%	6%	10%	11%	11%
Four or More Adults	2%	8%	7%	10%	5%	4%	5%	8%	5%	9%
Family Travel										
Travel with Children	25%	34%	35%	43%	31%	35%	24%	36%	30%	33%
Average Number of Children	1.8	2.0	1.8	2.0	1.8	1.8	1.9	2.2	1.8	2.0
Travel with Children from Household	22%	28%	30%	40%	27%	32%	22%	33%	25%	27%
Average Number of Children from Household	1.7	1.9	1.6	1.8	1.6	1.7	1.9	2.0	1.7	1.7

Mississippi visitors differ from visitors to touch-states

- Mississippi visitors report lower average incomes, are slightly older, and more likely to be African-American than visitors to its touch-states.

	Mississippi Visitors		Alabama Visitors		Arkansas Visitors		Louisiana Visitors		Tennessee Visitors	
	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019	FY 2018	FY 2019
Average Age	47	47	45	44	45	43	46	45	46	45
Average Household Income	\$77,000	\$69,200	\$82,600	\$84,800	\$73,000	\$82,200	\$81,000	\$83,700	\$79,600	\$79,100
Male	41%	35%	50%	43%	42%	33%	40%	36%	42%	31%
Married	65%	64%	61%	65%	65%	61%	59%	62%	65%	65%
Household Composition										
One Person	13%	17%	13%	15%	12%	16%	16%	11%	12%	13%
Two People	37%	36%	35%	32%	39%	32%	42%	35%	43%	36%
Three or More	50%	47%	52%	53%	49%	53%	42%	54%	45%	51%
Children in Household	38%	35%	40%	46%	39%	48%	33%	45%	36%	39%
Ethnicity/Hispanic Origin										
Caucasian	82%	83%	86%	88%	86%	91%	82%	86%	91%	91%
African-American	14%	14%	9%	8%	9%	5%	12%	11%	5%	5%
Hispanic	2%	3%	7%	8%	4%	6%	6%	4%	4%	3%
Employment										
Employed (full-time or part-time)	61%	62%	63%	66%	59%	66%	62%	66%	58%	58%
Retired	23%	25%	18%	17%	22%	15%	21%	18%	24%	21%

The popularity of Mississippi destinations continues to differ between in-state and out-of-state visitors

- Cities with a more pronounced casino gaming/sports betting scene appeal more strongly to those who live outside Mississippi, as highlighted by Biloxi/Gulfport (40% out-of-state vs. 8% in-state).
- Jackson continues to top the list for in-state visitors.

Top Mississippi Destinations
(ranked by FY 2019)

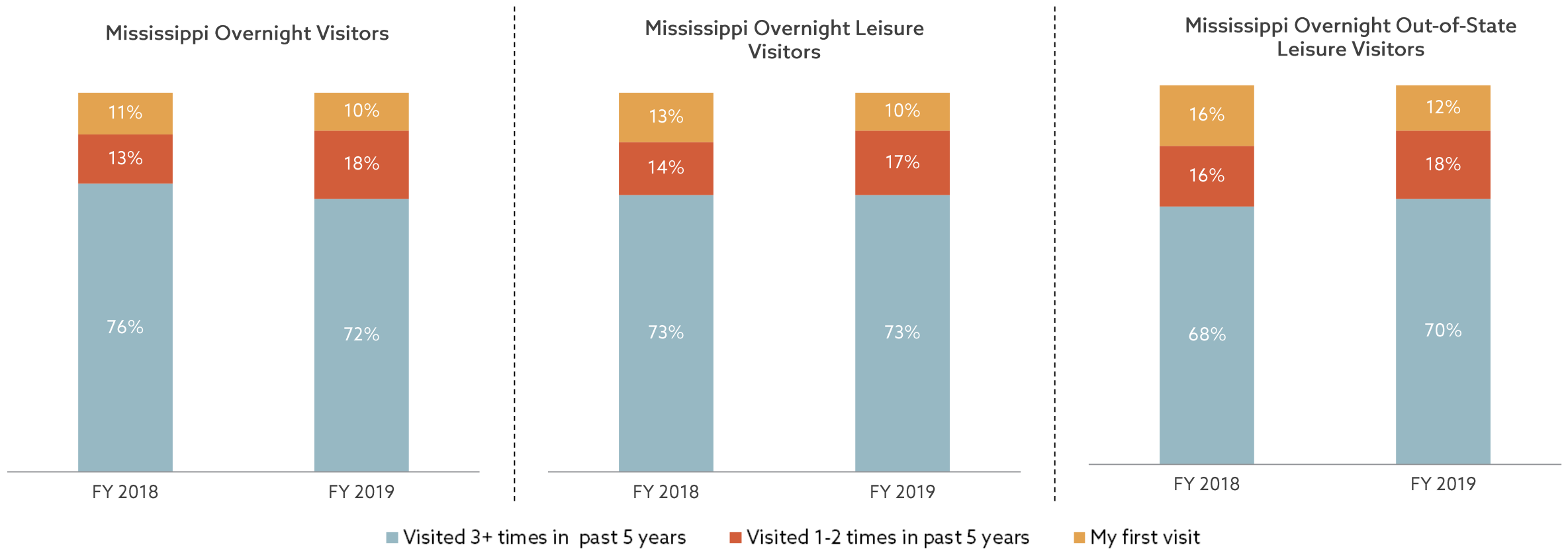
Mississippi Visitors	FY 2018	FY 2019
Biloxi/Gulfport	34%	24%
Jackson Area	17%	17%
Hattiesburg Area	9%	9%
Oxford	5%	8%
Tupelo	10%	7%
Tunica	6%	6%
Meridian	3%	6%
Vicksburg	5%	5%
Starkville	5%	3%
Philadelphia	3%	3%
Natchez	2%	2%

Mississippi In-State Visitors	FY 2018	FY 2019
Jackson Area	19%	17%
Oxford	6%	13%
Hattiesburg Area	14%	10%
Biloxi/Gulfport	17%	8%
Tupelo	16%	6%
Meridian	1%	5%
Tunica	4%	5%
Vicksburg	4%	3%
Starkville	7%	3%
Natchez	3%	1%
Philadelphia	4%	1%

Mississippi Out-of-State Visitors	FY 2018	FY 2019
Biloxi/Gulfport	44%	40%
Jackson Area	16%	17%
Tupelo	6%	8%
Hattiesburg Area	6%	7%
Tunica	6%	7%
Meridian	3%	6%
Vicksburg	5%	6%
Philadelphia	2%	4%
Oxford	4%	4%
Natchez	2%	3%
Starkville	3%	2%

Mississippi's visitors are familiar with the state

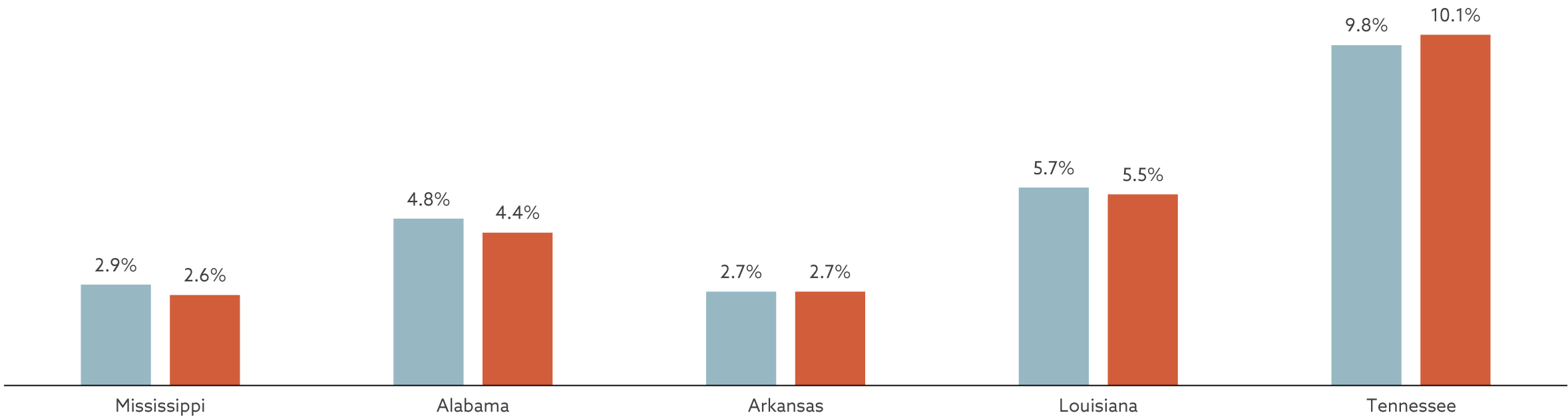
- Nearly three-fourths of Mississippi's overnight visitors have traveled to/within the state at least 3 times in the past five years.
- A greater portion of Mississippi's leisure overnight out-of-state visitors had traveled to the state before in FY 2019, compared to the previous fiscal year.



Mississippi experienced a dip in intent to visit in FY 2019, as did three of its four touch-states

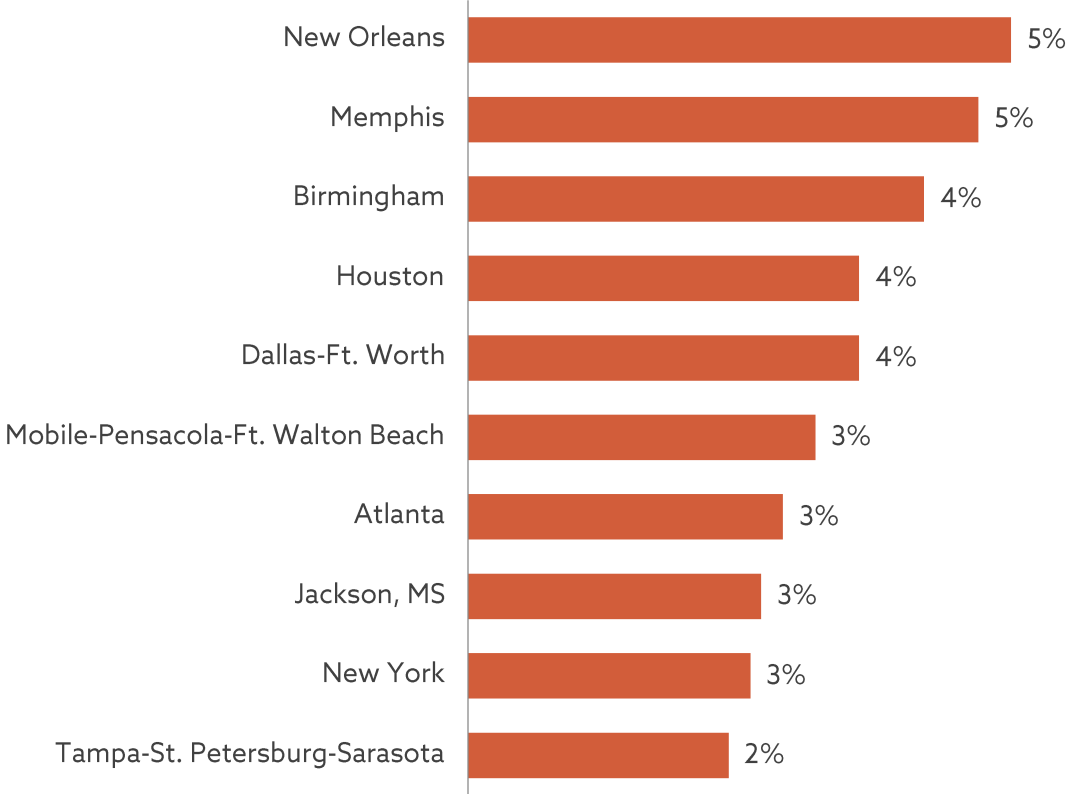
Intent to Visit within Next Two Years

FY 2018 FY 2019

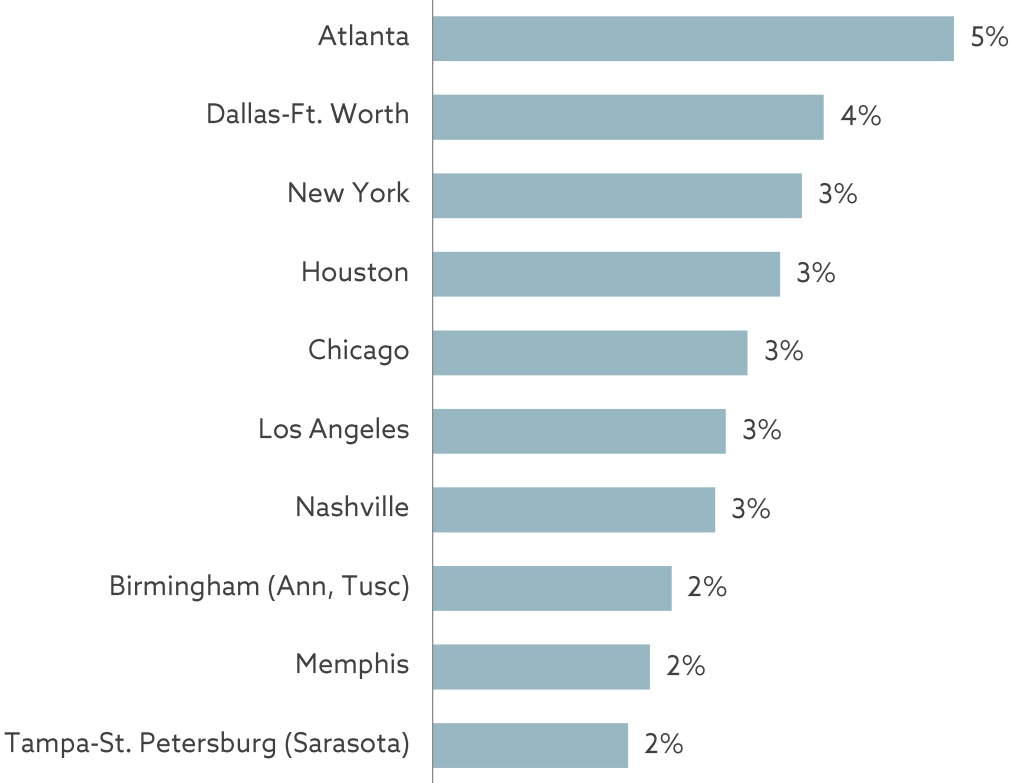


Intent to visit Mississippi is strongest in touch-state markets, as well as two markets in Texas—Houston and Dallas

Top Origin DMAs for Intent to Visit Mississippi



Top Origin DMAs for Intent to Visit Touch-States



THANK YOU

