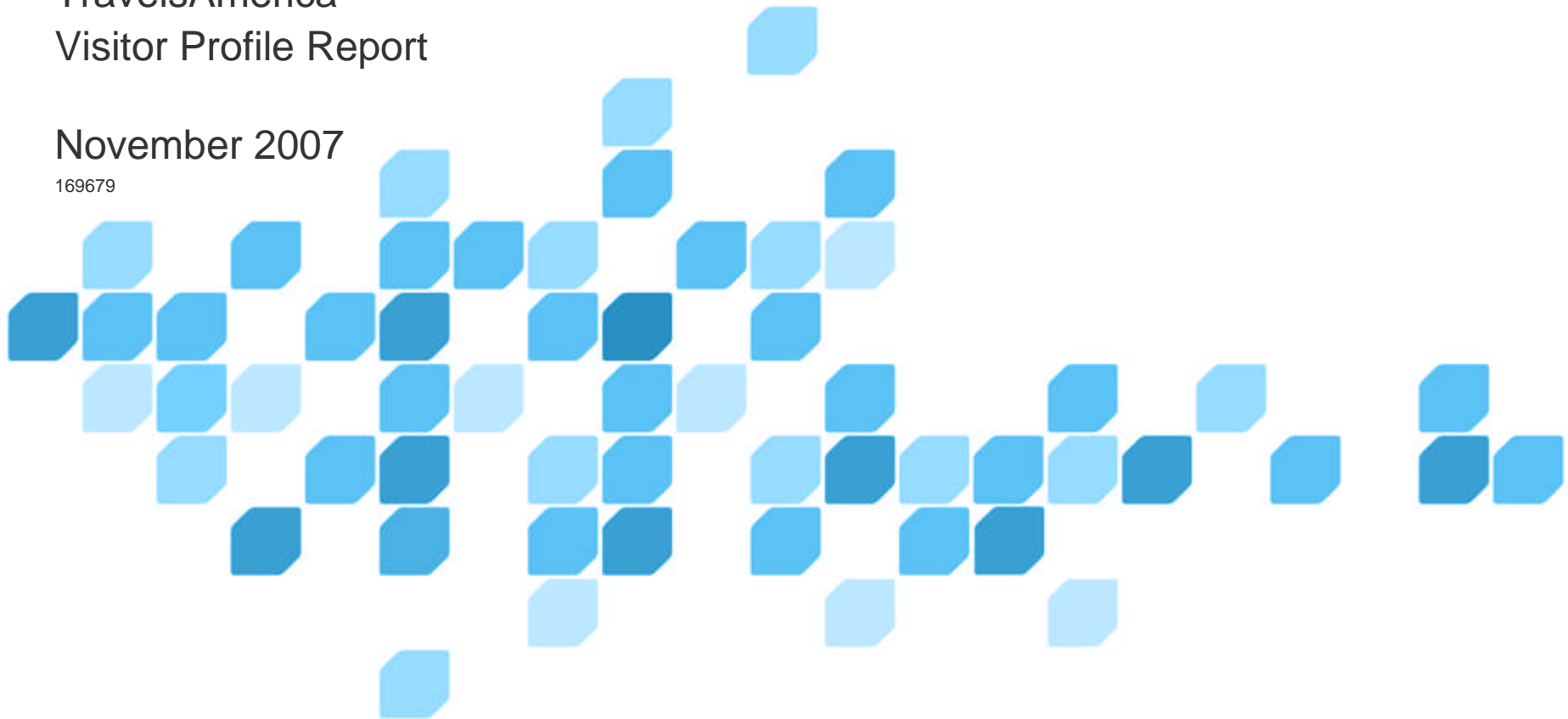


Biloxi/Gulfport, MS
TravelsAmerica
Visitor Profile Report

November 2007

169679



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Introduction and Purposes of the Research

TNS is pleased to present the TravelsAmerica report for the Mississippi Gulf Coast Convention and Visitor Bureau. This online (data collection) project is conducted continuously throughout the year by TNS as a nationwide syndication. The results provide Mississippi Gulf Coast CVB an assessment of visitor volumes and a profile of leisure visitors to the region.

This report assesses the regional (Branson, MO; Myrtle Beach, SC; Gulf Shores, AL; Pensacola, FL; and Destin/Ft. Walton, FL) volume of visitors and the volume for Biloxi/Gulfport, specifically. The profile of Biloxi/Gulfport visitors draws comparisons between:

- **Volume and source of visitors**
- **Basic demographics** of age, number of children in household, median household income
- **Trip characteristics** such as day vs. overnight, travel expenditures, length of stay, activities selected, mode of transportation
- **Visitor residence** by state
- **Potential niche marketing targets** derived from activities selected while in Biloxi/Gulfport

The report continues with a description of the research methods, then an Executive Summary. The following Results of the Research section includes detailed tables and graphics of findings. The questionnaire will be included in the bound report in the appendix.

Glossary

Term	Definition
Fiscal Year	July 1, 2006 through June 30, 2007
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/Household Level	Respondent information – one count per respondent
Source of Visitors	Residence of visitors
Travel Party	Traveler plus all companions, including children
Trip	Travel 50 miles or more (one-way) away from home or stayed overnight. Excludes commuters or commercial travel (flight attendants, commercial vehicle operator).
Trip Level	Information about all trips – each trip counts
Trip Volume	All trips summed together
Visitor	Person who has visited Biloxi/Gulfport in the past month; all are US residents, thus, travel is domestic travel only (domestic consumer)
Volunteers/Hurricane Workers	Not explicitly counted; unlikely to be panel respondents during the survey

Research Methods

The syndicated TravelsAmerica uses an Internet-based research method. Sample is selected from the TNS 6th dimension USA Panel with e-mail invitations sent monthly to representative households. TNS constantly strives to keep Internet penetration high and panel fatigue low by carefully monitoring and limiting the number of contacts with each household.

Each potential respondent receives an e-mail request to participate in the study each month. A response rate of 45% is targeted. The field period runs for two weeks each month, usually starting in the middle of the first week.

To enhance relevance, the data are weighted two ways:

- **Demographic weights** adjust respondents by demographic factors such as region, age, income, household size, and marital status to more closely represent the characteristics of the US population
- **Trip projection calculations** counts every trip taken by respondents for total trips taken. Detailed information collected for up to three trips in the past month is projected to the actual number of trips taken. In the case of state level calculations, each trip taken in that state counts. A few tables represent person-trips – these take into account the immediate travel party size for each trip as well. For projections, the counts are weighted to reflect the actual US population and total trips.

TNS conducts all fieldwork, editing, coding, and tabulation of the results.

This special report focuses on results for Biloxi/Gulfport. Base sizes are shown below.

FY 2007 Number of Travelers (Unweighted Respondents)	FY 2007 Number of Travelers (Weighted Respondents)	Region
283	238	Biloxi/Gulfport
433	354	New Orleans
483	386	Myrtle Beach
111	90	Gulf Shore
155	123	Pensacola
185	150	Destin/Ft. Walton
64,044	50,389	Total for TravelsAmerica
	(weighted by demographics)	

Executive Summary

- **Volume of Visitors** In comparison to the six competitor destinations, Biloxi/Gulfport ranks squarely in the middle of competitive destinations in attracting visitors to the area (3.6 million visitor annually):
- **Overnight Volume** Compared to the “average” American trip taken, Biloxi/Gulfport visitors are much more likely to stay overnight (85% vs. 77%)
- **Length of Stay** U.S. travelers average between three and four days for a leisure trip (3.4 nights). For Biloxi/Gulfport:
 - Most (60%) trips are between one and three nights away from home
 - Thus, visits to Biloxi/Gulfport tend to be shorter than average (2.8 nights vs. 3.4 nights)
 - Visitors to Florida tend to stay longer (5.2 nights in Destin/Ft. Walton and 4.7 nights in Pensacola).
- **Planning Process** Visitors to Biloxi/Gulfport are more likely than others to make the decision spontaneously: Half (49%) of all decisions to visit are made within two weeks of the visit, similar to the average US traveler (46%)
 - Biloxi/Gulfport visitors use similar information sources as average travelers, with some minor exceptions:
 - Biloxi/Gulfport visitors are more likely than others to make their decisions due to their own experiences (probably previous visits). Consistent with their greater spontaneity, they are less likely to make formal plans (23% made no plans vs. 31% average travelers)
 - They choose offline sources more often than average travelers (58% vs. 50%) and check the Internet less often (22% vs. 27%).
 - Biloxi/Gulfport visitors use similar information sources as average travelers, with some minor exceptions:
 - Biloxi/Gulfport visitors are more likely than others to make their decisions due to their own experiences (probably previous visits). Consistent with their greater spontaneity, they are less likely to make formal plans (23% made no plans vs. 31% average travelers)
 - They choose offline sources more often than average travelers (58% vs. 50%) and check the Internet less often (22% vs. 27%).

Executive Summary

- **Lodging** Three out of five visitor-nights (1.7 / 2.8 = 61%) in Biloxi/Gulfport are spent in hotels/motels
- **Demographics**
 - **Age:** Biloxi/Gulfport visitors are older (50) than visitors to competitive destinations, except Branson (51)
 - **Income:** Biloxi/Gulfport visitors report lower incomes (\$61,800) than the national average (\$69,300), but exceeds Branson (\$58,200) and Pensacola (\$59,500)
 - **Gender:** Biloxi/Gulfport attracts a greater proportion of females (57%) than most other destinations
 - **Family composition:** Higher than the national average but similar to competitive destinations, more than four out of five visitors come to Biloxi/Gulfport in groups of two or more
 - **Ethnicity:** Ethnic composition of Biloxi/Gulfport visitors is comparable to American travelers overall.
- **Travel Party Composition**
 - About one in three (36%) travels with one other person nationally while couples account for nearly half (46%) of Biloxi/Gulfport visitors
 - Biloxi/Gulfport visitors are less likely to travel with children under 18 than those traveling elsewhere, except New Orleans
 - Among those who bring children, the average number is 2.2, exactly the same as the national average.
- **Activities** Half (50%) of Biloxi/Gulfport visitors come to gamble; Biloxi/Gulfport shop relatively infrequently during their stays.

Executive Summary

- **Spending** Biloxi/Gulfport visitors spend 42 percent of their trip budget on gambling (\$256 on average). Although they tend to stay in hotels longer than visitors to other destinations, they spend less for lodging (\$86 versus \$146 national average). While slightly higher than the national average (\$610 vs. \$527), barring Pensacola, a Biloxi/Gulfport vacation is more economical than trips to competitor destinations.
- **Satisfaction** More than four out of five (83%) visitors to Biloxi/Gulfport leave feeling very or extremely satisfied.
- **Where Visitors Reside** Consistent with visitation to most destinations, people tend to visit near where they live, including Biloxi/Gulfport. For Biloxi/Gulfport, most visitors come from surrounding area, specifically, in-state Mississippi, Alabama, Florida, Louisiana, and Georgia.

Results of the Research



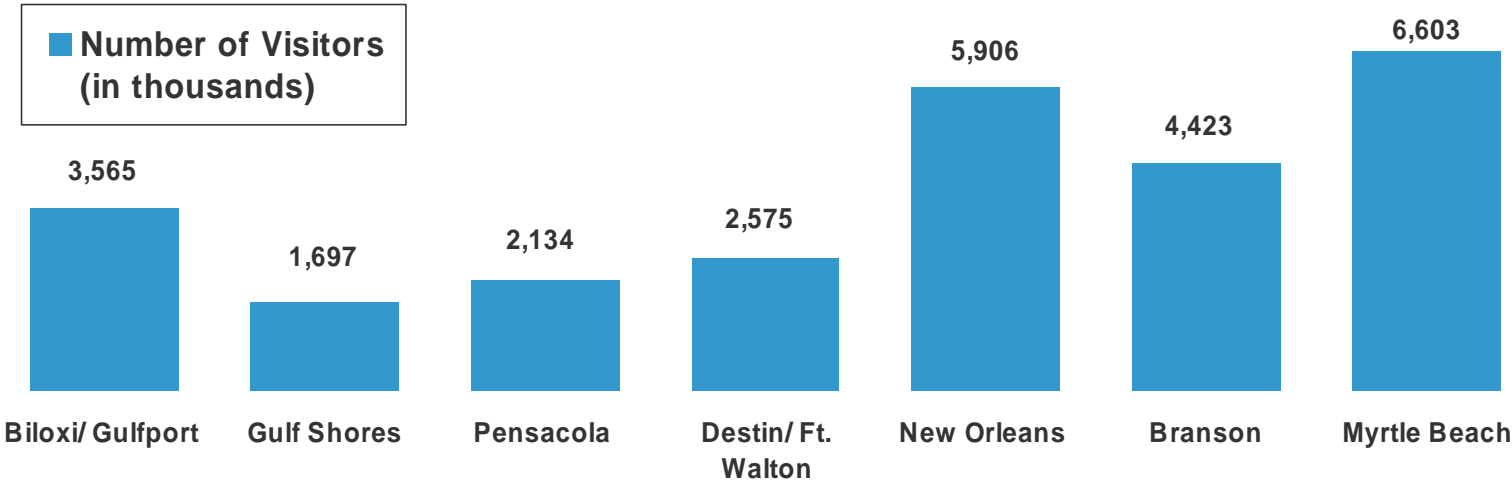
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Visitor Volume

In comparison to the six competitor destinations, Biloxi/Gulfport ranks squarely in the middle in attracting visitors to the area (3.6 million visitor annually):

- Behind Myrtle Beach (6.6 million), New Orleans (5.9 million), and Branson (4.4 million)
- Ahead of Destin/Ft. Walton ((2.6 million), Pensacola (2.1 million), and Gulf Shores (1.7 million).

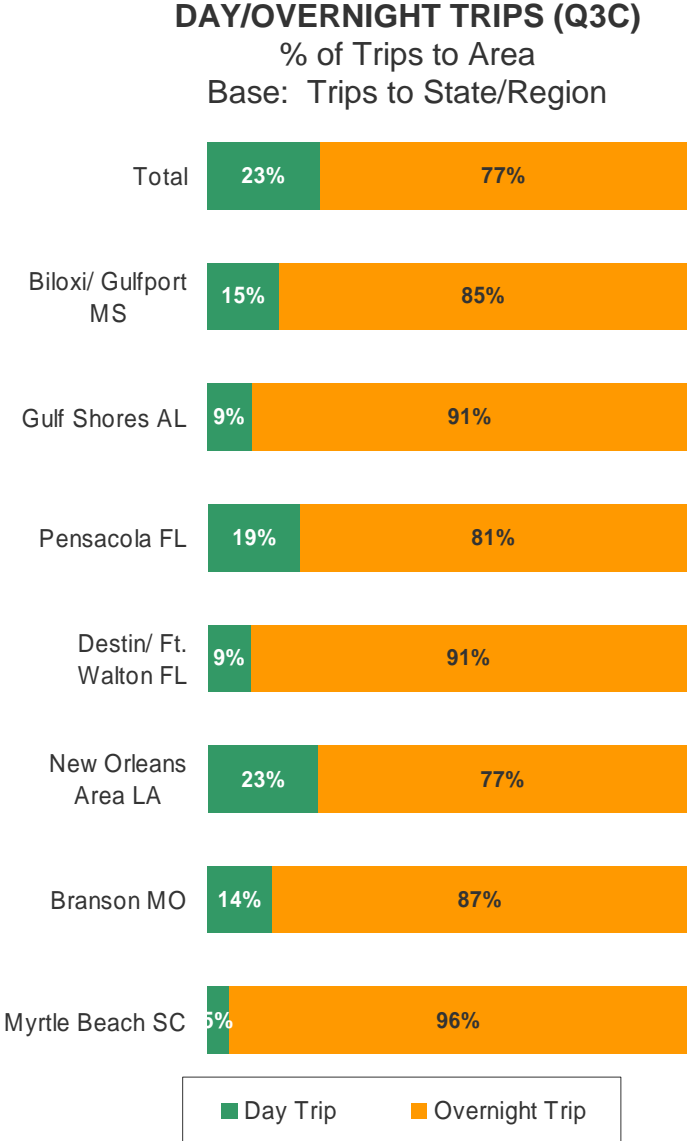
Projected Number of Annual Person-Trips



Trip Characteristics: Day/Overnight

Most Trips Include an Overnight Stay:

- Compared to the “average” American trip taken, Biloxi/Gulfport visitors are much more likely to stay overnight (85% vs. 77%)
- With the exception of New Orleans (its 23% of day trips matches the “average” trip), Biloxi/Gulfport competitors all attract visitors with prolonged stays.

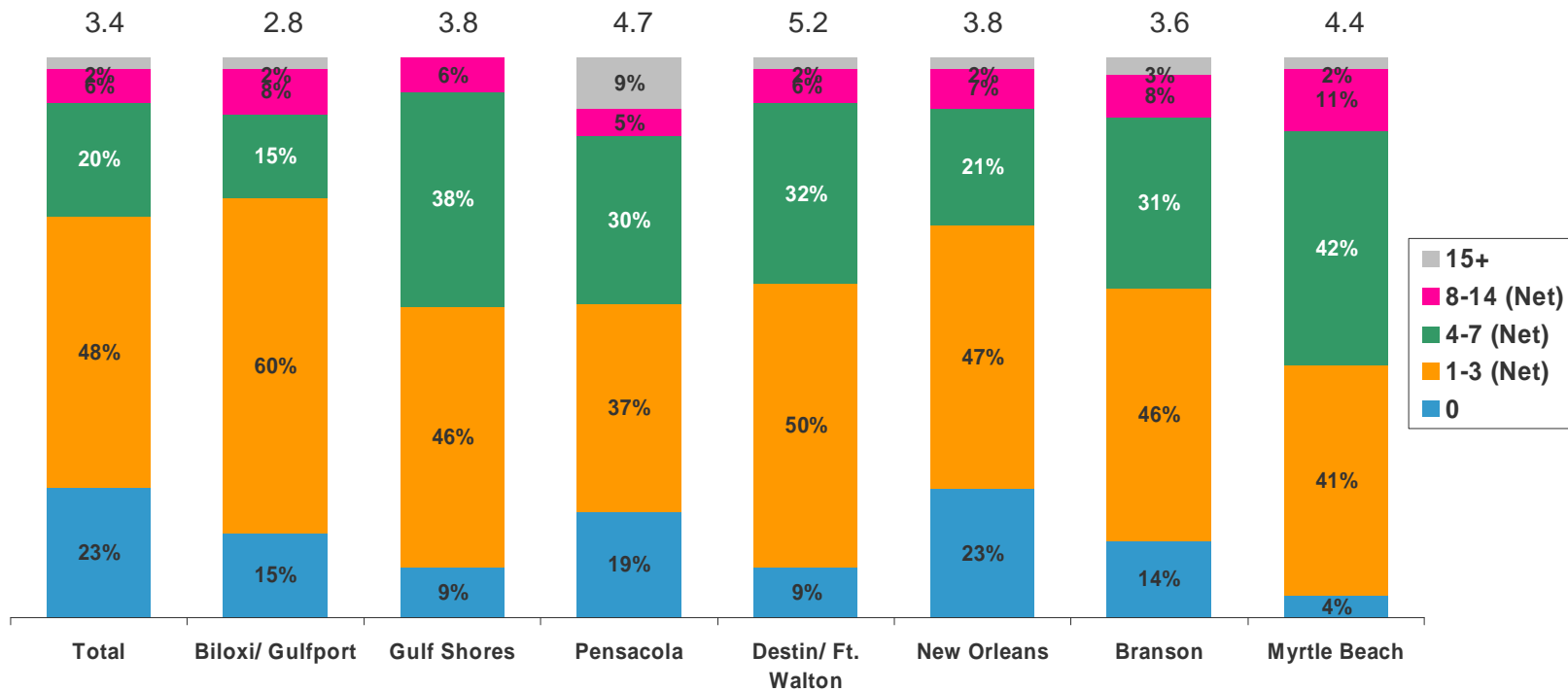


Average Length of Stay

U.S. travelers average between three and four days for a leisure trip (3.4 nights). For Biloxi/Gulfport:

- Most (60%) trips are between one and three nights away from home
- Thus, visits to Biloxi/Gulfport tend to be shorter than average (2.8 nights vs. 3.4 nights)
- Visitors to Florida tend to stay longer (5.2 nights in Destin/Ft. Walton and 4.7 nights in Pensacola).

Average Number of Nights at Destination:



Trip Planning

Visitors to Biloxi/Gulfport are more likely than others to make the decision spontaneously:

- Half (49%) of all decisions to visit are made within two weeks of the visit, similar to the average US traveler (46%)
- Visitors to every competitive destination take more time to decide to take the trip. Those traveling to Myrtle Beach spent the longest consideration period, where two in five (41%) decide to take the trip at least three months in advance, and more than half (54%) would begin considering a visit at least three months before actually embarking.

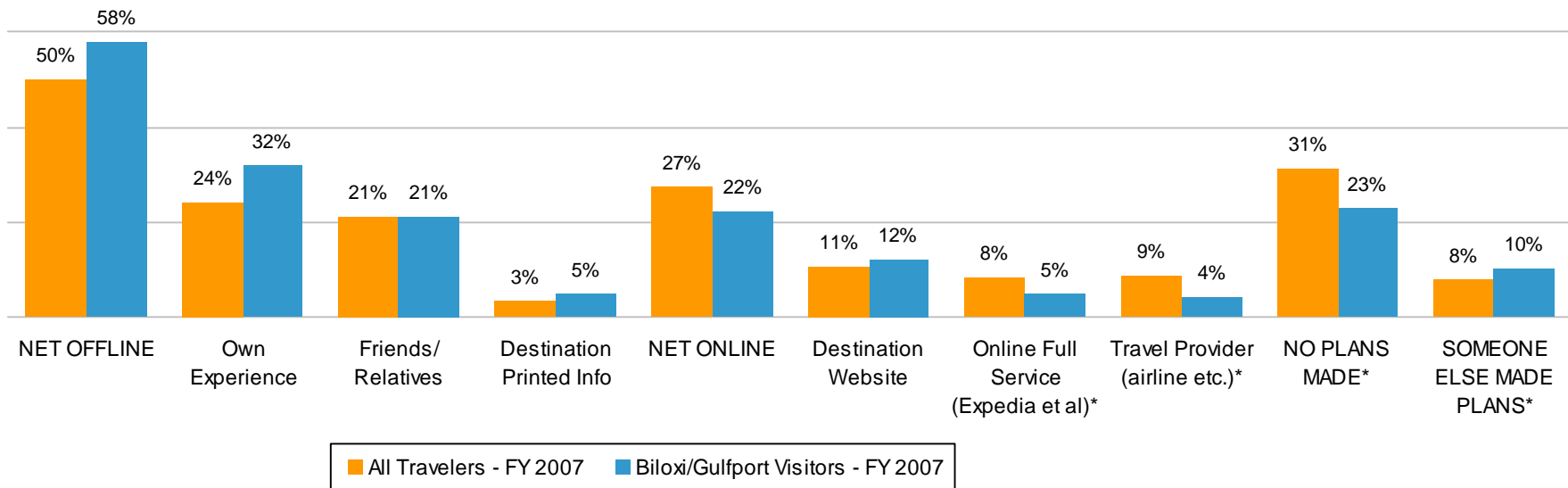
Trip Planning (Time Before Visit)	Total US Travelers	Biloxi/ Gulfport	Gulf Shores	Pensa- cola	Destin/ Ft. Walton	New Orleans	Branson	Myrtle Beach
Considered								
Within Two Weeks	36%	40%	23%	32%	22%	36%	20%	19%
2 – 4 Weeks	14	21	14	14	12	13	12	9
1 – 3 Months	19	17	25	17	20	17	20	18
3+ Months	31	22	38	37	46	34	48	54
Decided								
Within Two Weeks	46%	49%	34%	38%	30%	43%	27%	29%
2 – 4 Weeks	15	17	16	18	14	14	19	11
1 – 3 Months	17	17	25	13	22	18	20	19
3+ Months	22	16	26	31	35	26	34	41

Trip Planning

Biloxi/Gulfport visitors use similar information sources as average travelers, with some minor exceptions:

- Biloxi/Gulfport visitors are more likely than others to make their decisions due to their own experiences (probably previous visits). Consistent with their greater spontaneity, they are less likely to make formal plans (23% made no plans vs. 31% average travelers)
- They choose offline sources more often than average travelers (58% vs. 50%) and check the Internet less often (22% vs. 27%).

Information Sources to Plan a Trip (Q4j)
Ranked by All Sources (5%+)

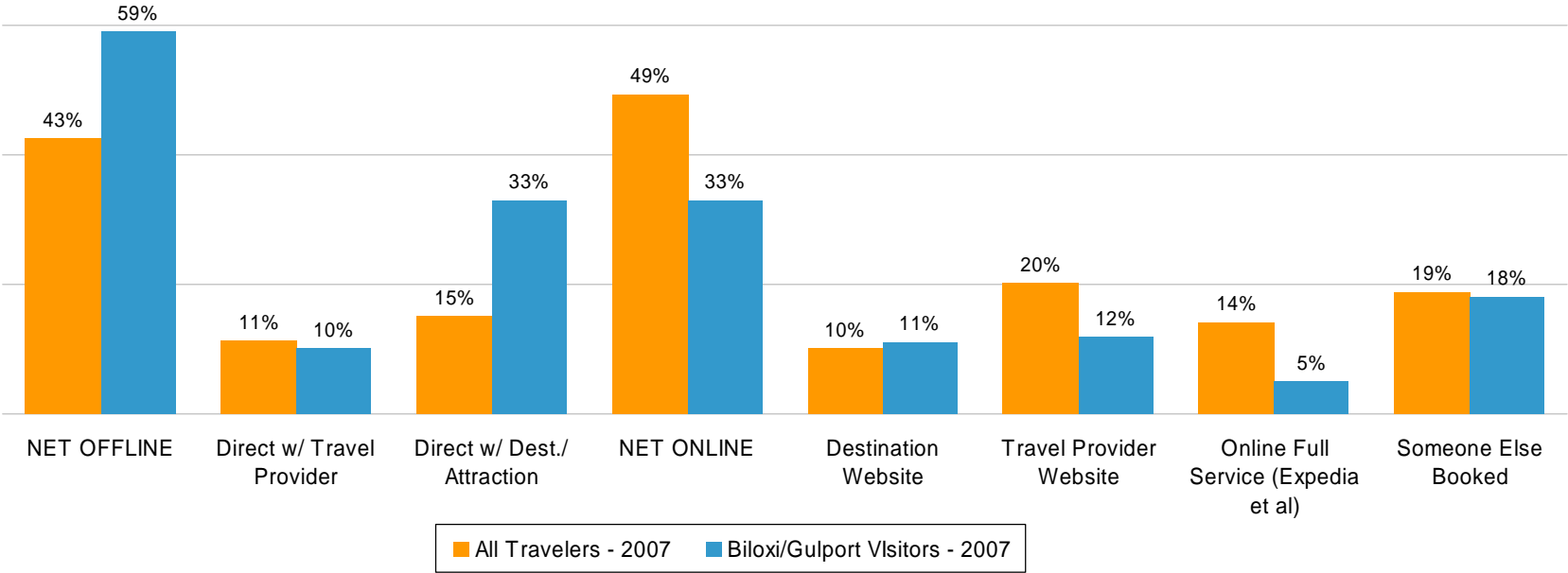


Trip Booking

Despite gathering information from similar sources, Biloxi/Gulfport visitors book their trip components differently than other travelers:

- Biloxi/Gulfport visitors are a third more likely to book “offline” than travelers to all other destinations (59% vs. 43%)
- More than twice as many Biloxi/Gulfport visitors book their travel components directly with the destination/attraction (33% vs. 15%)
- Biloxi/Gulfport visitors use online sources, such as travel provider websites and online full service travel agencies (Travelocity, Expedia, et. al.), much less frequently than travelers elsewhere.

Method Used to Book Trip Components (Q4k)
Ranked by All Sources (5%+)



Trip Characteristics: Visitor Choices

Most visitors come to Biloxi/Gulfport to play; most visits (84%) are for personal reasons:

- Equal numbers of people come to Biloxi/Gulfport to visit relatives and for entertainment/sightseeing
- Barring Branson, entertainment attracts visitors to Biloxi/Gulfport more than to other competitive destinations
- The lion's share of visitors (76%) arrive by automobile/truck. About one traveler in 11 (9%) flies to Biloxi/Gulfport.

Trip Choices (Trip Level)	Total US Travelers	Biloxi/ Gulfport	Gulf Shores	Pensacola	Destin/Ft. Walton	New Orleans	Branson	Myrtle Beach
PRIMARY TRIP PURPOSE								
NET Leisure/Personal	82%	84%	71%	82%	82%	74%	92%	93%
Visit Friends/Relatives	44	28	21	47	28	36	26	27
Entertainment/Sightsee	13	27	13	9	16	18	40	18
Business; Combined Bs/Ls	2	2	10	0	3	2	2	1
Personal Bs/Other	9	9	4	14	12	9	5	3
PRIMARY MODE								
% Own Auto/Truck	69	76	88	76	80	59	92	77
% Air Travel	19	9	11	13	10	27	3	10

*Excludes party sizes 8+ and anyone traveling by motorcoach or with a group tour

Where Visitors Stay

Three out of five visitor-nights ($1.7 / 2.8 = 61\%$) in Biloxi/Gulfport are spent in hotels/motels:

- The average number of nights in a hotel exceeds than the national average and, with the exception of New Orleans, higher than the other destinations considered in this report
- Hotel usage rates are higher than the national average (38%) and all competitive destinations, even New Orleans (50%)
- Biloxi/Gulfport stays tend to be shorter than others, averaging under three days.

Lodging (State Level)	Total US Travelers	Biloxi/ Gulfport	Gulf Shores	Pensacola	Destin/ Ft. Walton	New Orleans	Branson	Myrtle Beach
AVG # NIGHTS at destination	3.4	2.8	3.8	4.7	5.2	3.8	3.6	4.4
Private Home	1.5	0.6	0.9	2.2	1.3	1.6	0.6	0.9
Condo	0.1	0	1.1	0.7	2.0	0	0.4	1.1
Hotel/Motel	1.3	1.7	1.5	1.3	1.2	1.9	1.5	1.6
All Other	0.5	0.5	0.3	0.5	0.7	0.3	1.1	0.8

Visitor Demographics

- **Age:** Biloxi/Gulfport visitors are older (50) than visitors to competitive destinations, except Branson (51)
- **Income:** Biloxi/Gulfport visitors report lower incomes (\$61,800) than the national average (\$69,300), but exceeds Branson (\$58,200) and Pensacola (\$59,500)
- **Gender:** Biloxi/Gulfport attracts a greater proportion of females (57%) than most other destinations
- **Family composition:** Higher than the national average but similar to competitive destinations, more than four out of five visitors come to Biloxi/Gulfport in groups of two or more
- **Ethnicity:** Ethnic composition of Biloxi/Gulfport visitors is comparable to American travelers overall.

Demographics	Total US Travelers	Biloxi/Gulfport	Gulf Shores	Pensacola	Destin/Ft. Walton	New Orleans	Branson	Myrtle Beach
Average Age	46	50	47	47	42	43	51	46
Average Hhld Income	\$69,300	\$61,800	\$68,600	\$59,500	\$67,400	\$67,800	\$58,300	\$72,100
% Male	46%	43%	44%	40%	46%	43%	50%	51%
% Married	60%	60%	68%	58%	70%	59%	67%	69%
Household Composition								
% One Person	22%	16%	11%	17%	16%	18%	18%	14%
% Two People	35	43	38	35	31	33	39	34
% Three or More	43	41	51	48	53	49	43	52
Ethnicity								
% Caucasian	87	86	89	85	87	76	97	88
% African-American	8	12	11	11	11	19	1	10

Trip Characteristics: Travel Party

Biloxi/Gulfport visitors' travel companions sometimes differ from those to other destinations:

- About one in three (36%) travels with one other person nationally while couples account for nearly half (46%) of Biloxi/Gulfport visitors
- Biloxi/Gulfport visitors are less likely to travel with children under 18 than those traveling elsewhere, except New Orleans
- Among those who bring children, the average number is 2.2, exactly the same as the national average.

TYPE OF TRIP
Base: All Trips

Trip Characteristics (Trip Level)	Total US Travelers	Biloxi/Gulfport	Gulf Shores	Pensacola	Destin/Ft. Walton	New Orleans	Branson	Myrtle Beach
AVERAGE # IN TRAVEL PARTY (Q3a)	2.9	2.9	3.2	2.4	3.1	2.6	3.7	3.4
% Travel in Pairs	36	45	34	33	33	40	43	36
% Traveling with Children	27	23	39	30	37	21	38	39
Avg. # of Children on Trip (if any)	2.2	2.2	2.1	1.8	1.9	1.7	2.2	2.0

Trip Characteristics: Vacation Activities/Attractions

Top vacation activities and attractions for Biloxi/Gulfport include:

- Half (50%) of Biloxi/Gulfport visitors come to gamble; New Orleans ranks a distant second (21%)
- Visitors to Biloxi/Gulfport shop relatively infrequently during their stays.

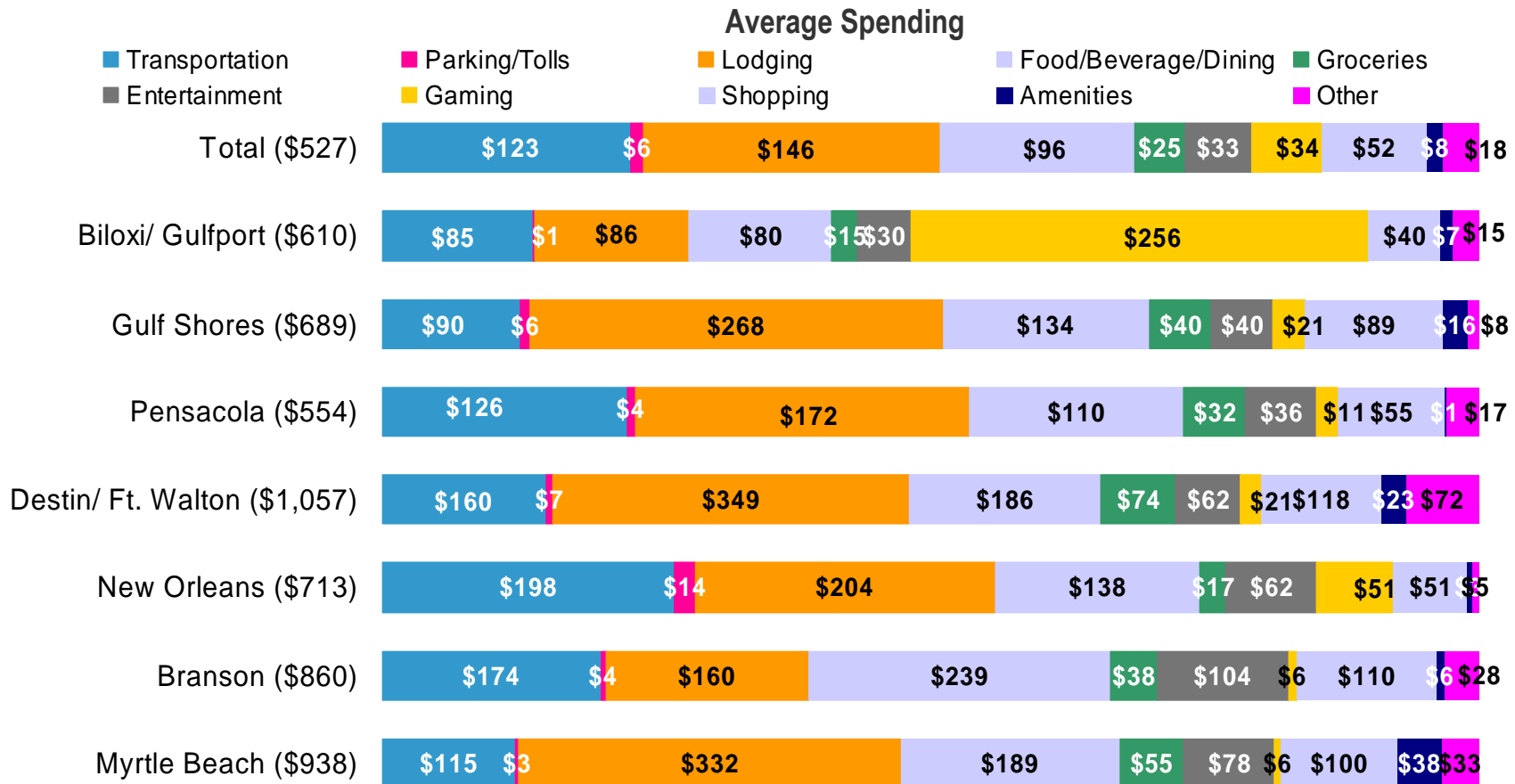
Activities Participated/Attractions Visited (Q4h)

	Total US Travelers	Biloxi/Gulfport	Gulf Shores	Pensacola	Destin/Ft. Walton	New Orleans	Branson	Myrtle Beach
Shopping	22%	20%	42%	30%	47%	29%	49%	52%
Visiting relatives	20%	12%	11%	25%	15%	14%	13%	11%
Fine dining	15%	20%	26%	18%	33%	27%	26%	37%
Family reunion	12%	8%	7%	13%	10%	10%	8%	12%
Visiting friends	12%	12%	4%	14%	14%	16%	8%	10%
Rural sightseeing	10%	11%	16%	12%	14%	7%	25%	13%
Beach	9%	17%	60%	47%	71%	0%	2%	71%
Casino/gaming	7%	50%	7%	3%	3%	21%	3%	2%
Urban sightseeing	7%	8%	10%	11%	15%	22%	12%	9%
State/National Park	6%	3%	14%	8%	7%	1%	9%	6%
Historic sites/churches	6%	5%	6%	9%	5%	16%	6%	7%
Museums	5%	2%	6%	15%	5%	6%	14%	8%
Nightclub/dancing	5%	5%	9%	7%	11%	18%	2%	9%
Theme park	4%	1%	8%	8%	8%	1%	32%	11%
Wildlife viewing	4%	2%	5%	3%	7%	2%	7%	6%

Trip Characteristics: Expenditures by Type of Travel

Spending patterns differ from competitors:

- Biloxi/Gulfport visitors spend 42 percent of their trip budget on gambling (\$256 on average)
- Although they tend to stay in hotels longer than visitors to other destinations, they spend less for lodging (\$86 versus \$146 national average)
- While slightly higher than the national average (\$610 vs. \$527), barring Pensacola, a Biloxi/Gulfport vacation is more economical than trips to competitor destinations.

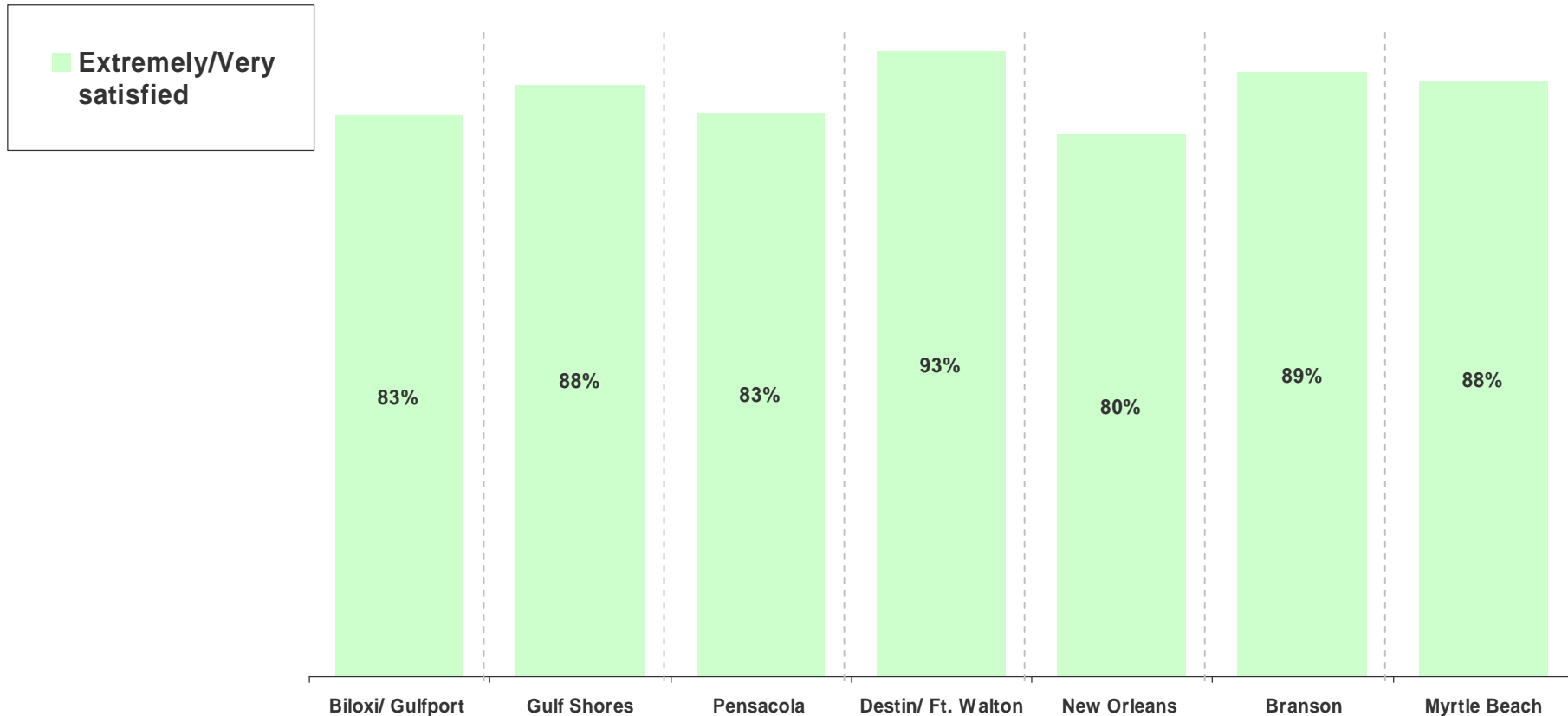


Satisfaction

While strong, several competitors receive a higher proportion of “satisfied” ratings:

- More than four out of five (83%) visitors to Biloxi/Gulfport leave feeling very or extremely satisfied
- Competitive destinations receive similar satisfaction marks.

Satisfaction with Biloxi/Gulfport (Q4I)



Where Visitors Live

Among All Travelers:

- Consistent with visitation to most destinations, people tend to visit near where they live, including Biloxi/Gulfport. For Biloxi/Gulfport, most visitors come from surrounding area, specifically, in-state Mississippi, Alabama, Florida, Louisiana, and Georgia.
- Top feeder markets are described in the chart below for each competitive destination. The top 10 feeder markets are listed for each.

Biloxi/ Gulfport		Gulf Shores		Pensacola		Destin/ Ft. Walton		New Orleans		Branson		Myrtle Beach	
	%		%		%		%		%		%		%
Mississippi	22	Alabama	58	Alabama	23	Alabama	28	Louisiana	30	Missouri	28	NC	25
Alabama	18	Louisiana	8	Florida	22	Georgia	17	Texas	21	Arkansas	17	SC	20
Florida	18	Mississippi	7	Texas	12	Florida	15	Mississippi	8	Oklahoma	12	Virginia	10
Louisiana	14	Georgia	4	Georgia	10	Tennessee	10	Georgia	6	Illinois	7	Ohio	5
Georgia	7	Indiana	4	Mississippi	9	Louisiana	6	California	5	Kansas	7	Tennessee	4
Texas	4	Maryland	2	Tennessee	6	Texas	5	Alabama	4	Texas	4	Penn	4
NC	3	Tennessee	2	Louisiana	3	Ohio	3	Florida	3	Iowa	3	Georgia	4
Tennessee	2	Kansas	2	California	3	Mississippi	3	Ohio	3	Indiana	3	New York	4
Arkansas	2	Missouri	2	Arkansas	2	Missouri	2	Illinois	2	Wisconsin	3	Florida	4
Penn	1	New York	2	Ohio	1	Kentucky	2	Indiana	2	Mississippi	3	Maryland	4

Appendix



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