VISIT HATTIESBURG

Comprehensive Travel Market Research & Strategic Planning

Prepared for:

Hattiesburg Tourism Commission

Study Conducted: April – October, 2019

Research Report Submitted – October, 2019

Research Conducted by:

Young Strategies, Inc.

Charlotte, NC

"If you build a place people want to visit,
you build a place where people want to live.

"If you build a place where people want to live,
you'll build a place where people want to work.

"If you build a place where people want to work,
you'll build a place where business has to be.

"And if you build a place where business has to be,
you'll build a place where people have to visit."

—Maura Gast, Irving, TX, CVB and DMAI Chair, July 2009.

Client Destinations

The Young Strategies project team, both individually and collectively have conducted destination research and planning in thirty-three states:

Alabama
Arizona
California
Florida
Georgia
Iowa
Illinois
Kansas
Kentucky
Louisiana
Maine
Massachusetts
Michigan
Minnesota
Mississippi
Missouri
Montana
Nebraska
New Jersey
New Mexico
New York
North Carolina
North Dakota
Ohio
Oklahoma
Pennsylvania
South Carolina
South Dakota
Tennessee
Texas
Virginia
Washington
West Virginia
Wyoming

Hattiesburg, MS
Travel Market Research

RESEARCH OBJECTIVE:

Young Strategies will provide a research-based travel market study for the Hattiesburg Tourism Commission that:

- Identifies the current segmented markets, visitor geo/socio-demographic profile and spending levels
- Identifies the attractors/motivators that drive visitation to the Hattiesburg area
- Identifies target/growth markets, visitor segments and strategies with the optimal ROI
- Provides and digital media assessment including Uber Media
- Analyzes the effectiveness of current brand and related advertising campaigns
- Develops an overall comprehensive strategic action plan
- Develops a solid, reliable annual economic impact model

SURVEY RESPONSES:

- 307 were visitors to the Hattiesburg, MS area in the last 3 years
- 808 were Forrest/Lamar/Perry Counties / City of Hattiesburg area residents
- 249 were residents of the Southeastern/Gulf Coast region of Mississippi
- 13 had not visited the Hattiesburg, MS area in the last 3 years

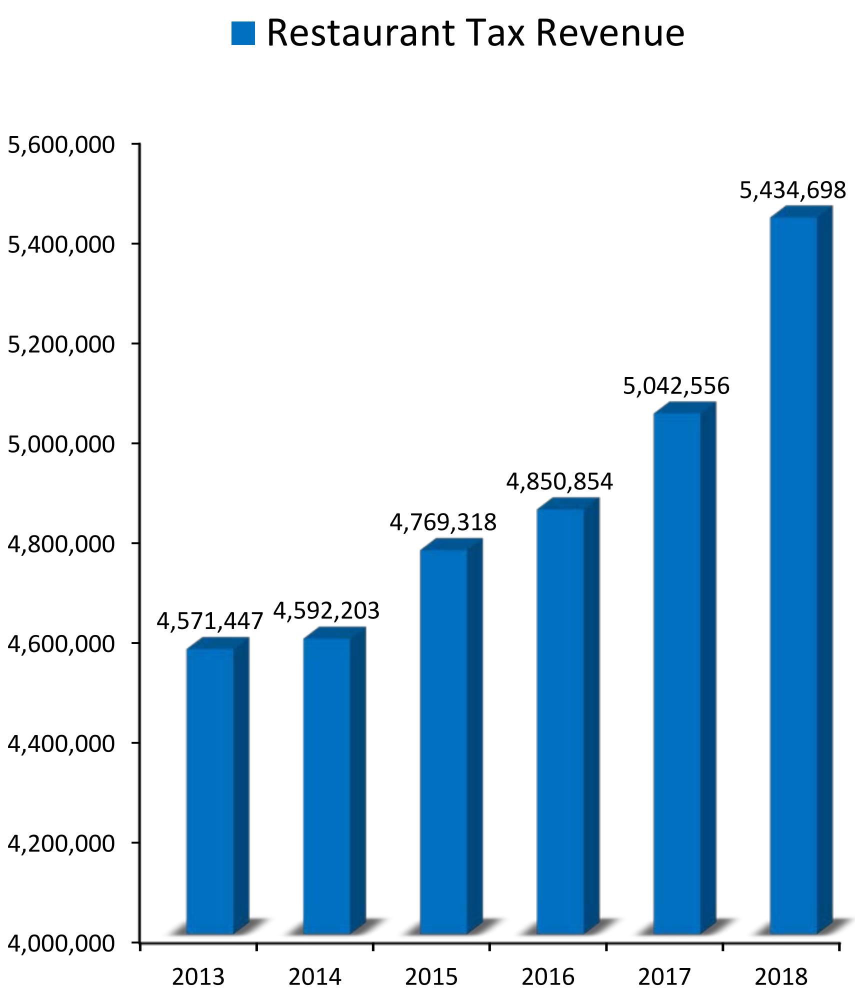
2018 Travel Related Spending & Metrics for Mississippi Travel Regions

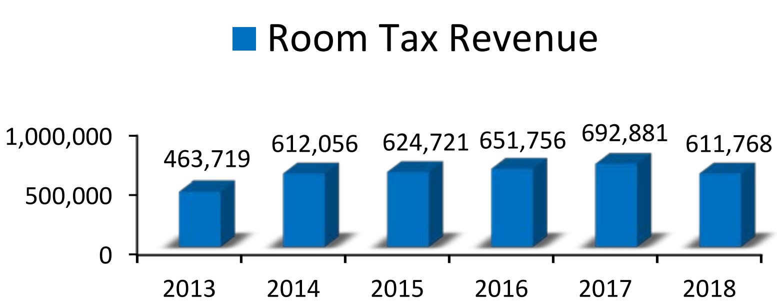
5 Regions of Mississippi45	Regional Ranking in State	% of Sales in State	% of Labor in State	2018 Direct Visitor Spending '000	% of Growth 2017/18
Coastal Region	**1**	**40.5%**	**38.8%**	**$2,567,930,267**	**4.0%**
Capital Region	2	20.7%	24.0%	$1,312,244,816	1.4%
Hills Region	3	17.3%	16.5%	$1,095,663,019	3.6%
Delta Region	4	12.7%	10.8%	$804,602,155	-0.7%
Pines Region	5	8.8%	9.9%	$556,676,631	0.9%
TOTAL		**100.0%**	**100.0%**	**$6,337,116,888**	

Source: FY2017 and FY2018 Mississippi Tourism – Economic Contribution Reports (Regional Focus Tables).

Coastal Region 2018 Regional Tourism Impact	Rank	% of Sales in Region	Travel and Tourism Expenditures by Visitors "000	Direct Travel & Tourism Employment	Travel and Tourism Employment %	State and Local Taxes Attributed to Travel & Tourism
Gulf Coast	1	82.6%	$2,122,267,112	28,200	18.2	237,573,894
Hattiesburg Area	**2**	**11.4%**	**$292,423,282**	**4,470**	**6.9**	**26,409,879**
Jones	3	2.5%	$63,004,583	890	3.3	5,692,362
Pearl River	4	1.2%	$31,075,731	415	3.9	2,586,685
Stone	5	0.6%	$14,140,165	190	4.6	1,208,253
Marion	6	0.5%	$12,599,653	160	2.0	925,338
George	7	0.4%	$10,131,980	145	2.9	756,426
Covington	8	0.4%	$10,128,210	138	2.6	$815,468
Wayne	9	0.3%	$7,896,019	112	2.3	608,620
Jefferson Davis	10	0.1%	$2,323,898	32	1.9	208,439
Greene	11	0.1%	$1,939,634	27	1.5	181,252
TOTAL		**100.0%**	**$2,567,930,267**	**34,779**	**12.1**	**$276,966,616**

Hattiesburg Restaurant and Meals Tax Revenue Six-Year Trend





HATTIESBURG, MS AREA REPORT CARD

Hattiesburg	2013	2018	Change %
STR Annual Hotel/Motel Lodging Supply	568,305	743,639	+30.9%
STR Occupancy Rate	62.7%	57.6%	-0.8%
STR ADR (Average Daily Rate)	$81.78	$86.64	+5.9%
STR Room Annual Nights Sold/Room Demand	356,494	428,566	+20.2%
TOTAL Room Revenue – calendar year (STR-participating properties ONLY)*	$29,154,400	$37,131,881	+27.4%

Source: STR 6-Year Trend Report – STR participating properties only

US Hotels – Key Performance Indicators						
Year	Occupancy	% of Change	ADR	% of Change	RevPAR	Change
2014	64.4%	3.4%	$115.32	4.6%	$74.28	8.3%
2015	65.4%	1.6%	$120.29	4.3%	$78.67	5.9%
2016	65.5%	0.1%	$123.97	3.1%	$81.19	3.2%
2017	65.9%	0.9%	$126.72	2.1%	$83.57	3.0%
2018	66.2%	0.5%	$129.83	2.4%	$85.96	2.9%

Source: STR annual US Hotel - KPI's, reported annually in STR Hotel News Now

VISIT HATTIESBURG

Lodging Market Analysis

HBURG

YOUNG strategies, inc. fresh. travel. research.

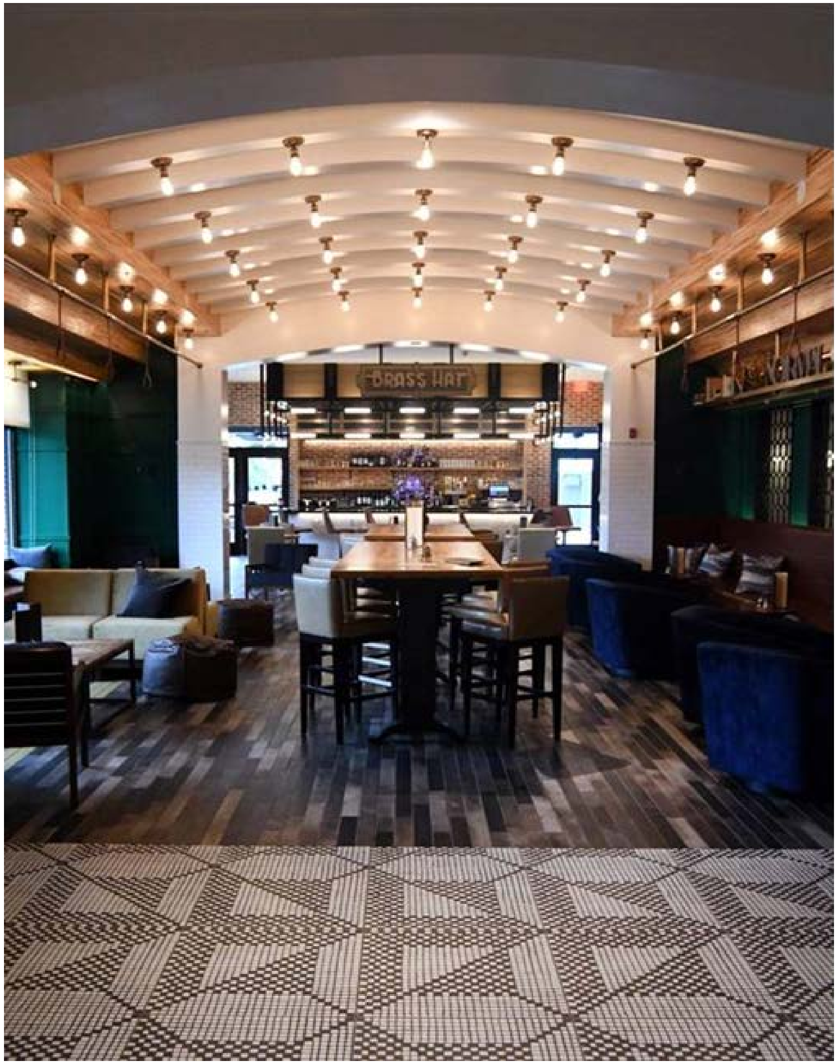
Hattiesburg, MS Lodging Study Methodology

Young Strategies, Inc. (YSI) conducted a survey of the hotel/motel properties located in Hattiesburg, MS as part of a lodging market analysis commissioned by VisitHATTIESBURG. In addition, Young Strategies purchased lodging data from STR for the hotel/motel properties located in Hattiesburg, MS in the form of a 6-year trend report and a 365-daily data report for all STR-participating hotel/motel properties.

A short questionnaire was sent to the database of hotel/motel lodging properties in Hattiesburg to estimate the following key metrics for the full calendar year 2018: percentage of occupancy driven by 12 market segments and annual occupancy. The survey also contained four open-ended questions allowing hoteliers to share the following information: 1) any notable changes in overall room night demand in 2018 as compared to previous year, 2) do you anticipate annual occupancy in 2019 to be up or down 3) their perception of the biggest challenge in marketing their lodging property and 4) provide any suggestions for future sales/marketing efforts for VisitHATTIESBURG. Lodging surveys were collected for the 3-month time period, July through September 2019.

The VisitHATTIESBURG hotel/motel database had 37 properties with approximately 2,991 rooms actively collecting lodging tax at the time of the YSI lodging study. Of the 37 properties in the Hattiesburg market, 26 properties with 2,259 rooms or 75.5% of the total inventory, participate with STR. Of these 26 STR-participating properties, **a total of 14 participated in the YSI survey which provided an overall response rate of 56.9%.** This response is considered to be very reliable as well as a highly predictive sample of the overall market based on the size and geographic distribution of the Hattiesburg hotel/motel lodging inventory.

Note: The 11 independent properties with a total of 732 rooms in the Hattiesburg lodging inventory do not participate with STR and did not participate in the YSI study.



The charts and tables on the following pages outline the overall findings from the lodging properties that responded to the YSI survey. YSI estimates a margin of error (+/- 3-5%).

Hattiesburg, MS Hotel/Motel Lodging Inventory

Hattiesburg STR Participating Hotel/Motel Inventory Inventory – Age / Room Count	Open Date	Rooms
1989 – Prior = 2 Properties	**12.0%**	**270**
Red Roof Inn	Feb-75	117
Red Lion Inn & Suites	Jul-83	153
1990 - 1999 = 7 Properties	**23.4%**	**529**
Super 8 Hattiesburg North	Dec-95	42
Comfort Suites Hattiesburg	Sep-95	68
Fairfield Inn & Suites Hattiesburg	Jan-97	79
Econo Lodge Hattiesburg	Jan-99	69
Super 8 Hattiesburg South	Jan-99	62
Baymont Inn & Suites Hattiesburg	Mar-99	92
Sun Suites	Dec-99	117
2000 - 2009 = 9 Properties	**33.6%**	**760**
Double Tree by Hilton	Mar-00	138
Quality Inn & Suites	Mar-05	59
Days Inn Hattiesburg	May-05	57
Courtyard Hattiesburg	Oct-06	84
Microtel Inn & Suites	Apr-07	77
Candlewood Suites Hattiesburg	Jun-07	109
Hilton Garden Inn	Aug-07	90
Sleep Inn & Suites	Jul-08	62
Residence Inn Hattiesburg	Dec-08	84
2010 - Present = 8 Properties	**31.0%**	**700**
LaQuinta Inn & Suites	Jan-15	84
Best Western Premier University Inn	Oct-15	75
TownePlace Suites	Feb-16	94
Hampton Inn Hattiesburg	Sep-16	78
Home2 Suites	Sep-16	66
Howard Johnson Hattiesburg	Mar-17	75
Hotel Indigo	Jul-18	100
Holiday Inn Hattiesburg North	Oct-18	128
26 TOTAL Hotel/Motel Properties	**Rooms=**	**2,259**

Source: STR 6-YR Trend – Hattiesburg, MS lodging database

The 37 hotel/motel properties located in Hattiesburg, MS are listed in chronological order by open date in the tables below. A total of 26 properties are currently participating with STR (2, 259 rooms) while another 11 properties are considered independent (732 rooms). Total lodging inventory is 37 properties with 2,991 rooms.

Hattiesburg Independent Hotel/Motel Inventory Inventory – Age / Room Count	Open Date	Rooms
1989 – Prior = 12 Properties	**100.0%**	**732**
Carriage Inn	N/A	34
Dru's Inn	N/A	31
Executive Inn	Sep-67	60
Star Motel	Jun-69	94
Luxury Inn	Jun-78	98
Broadway Inn Motel	Jan-80	34
Western Motel	Mar-80	45
Northgate Inn	Jun-83	82
University Inn	Jun-86	80
Magnuson Hotel	Mar-88	128
Sunset Inn	Jun-88	46
11 TOTAL Hotel/Motel Properties	**Rooms=**	**732**

Hattiesburg, MS Hotel/Motel Lodging Classification

STR classification for the 26 Hattiesburg STR-participating hotel/motel properties is shown in the table below. Of the 11 independent properties, all are classified as economy, with the exception of one midscale level property.

STR-participating Hotel/Motel Classification	# of Properties	# of rooms	% of Market
Upper Upscale	1	100	4.4%
Upscale	5	471	20.8%
Upper Midscale	7	597	26.4%
Midscale	5	475	21.0%
Economy	8	616	27.3%

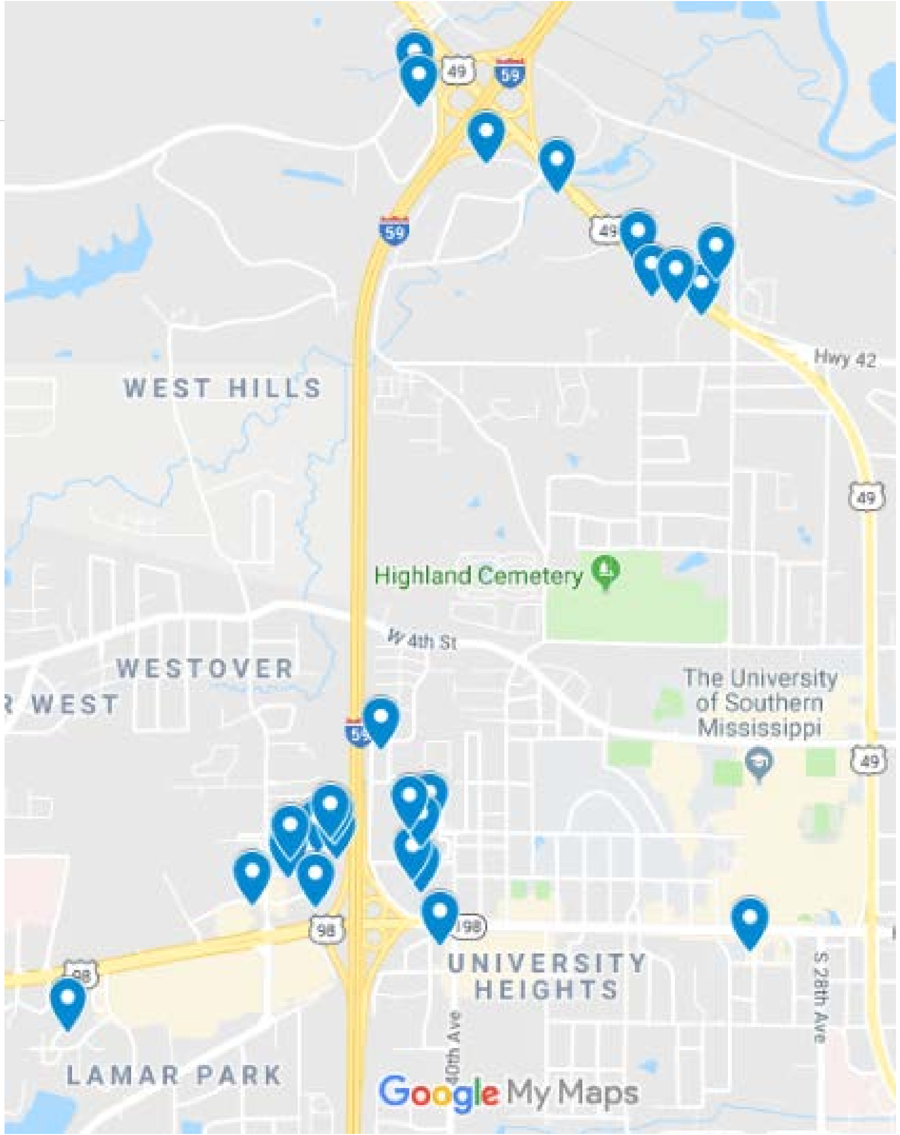
Hattiesburg Hotel/Motel Properties – Geographical mapping

Hattiesburg, MS Lodging NORTH

- Candlewood Suites Hattiesburg
- Doubletree by Hilton Hattiesburg
- Econo Lodge
- Holiday Inn Hattiesburg - North
- Howard Johnson by Wyndham Hattiesburg
- Quality Inn & Suites
- Red Roof Inn Hattiesburg
- Sleep Inn & Suites
- Super 8 by Wyndham Hattiesburg North

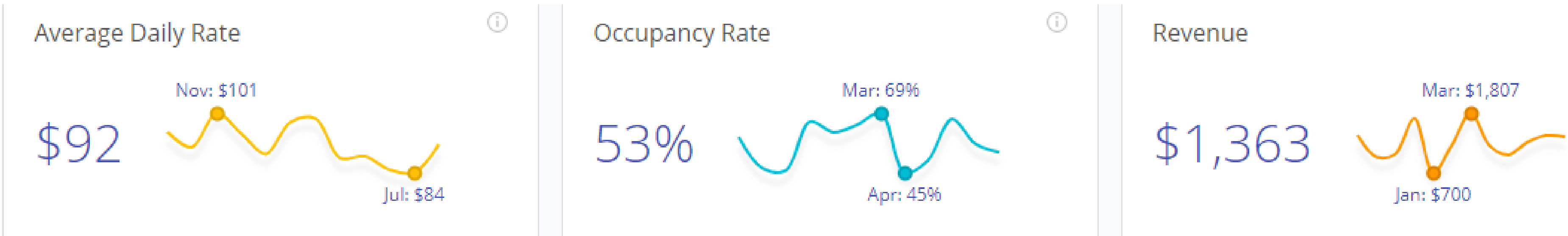
Hattiesburg, MS Lodging- SOUTH

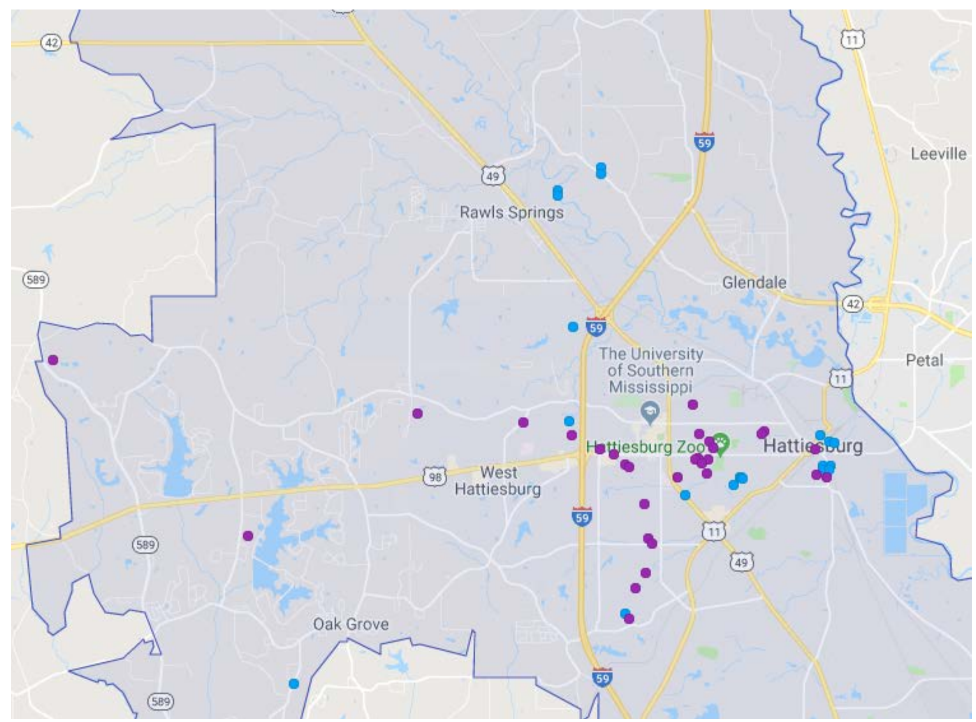
- Baymont by Wyndham Hattiesburg
- Best Western Premier University Inn
- Comfort Suites
- Courtyard by Marriott Hattiesburg
- Days Inn by Wyndham Hattiesburg MS
- Fairfield Inn & Suites by Marriott Hattiesburg
- Hampton Inn by Hilton Hattiesburg
- Hilton Garden Inn Hattiesburg
- Hotel Indigo Hattiesburg
- Home2 Suites by Hilton Hattiesburg
- La Quinta Inn & Suites by Wyndham Hatties...
- Microtel Inn & Suites by Wyndham Hattiesb...
- Red Lion Inn & Suites Hattiesburg
- Residence Inn by Marriott Hattiesburg
- Sun Suites
- Super 8 by Wyndham Hattiesburg South
- TownePlace Suites by Marriott Hattiesburg



Hattiesburg, MS Vacation Rentals by Owners

AirDNA shows 51 rental properties in Hattiesburg with a variety of price ranges; 63% (32) of these rentals were for an entire home and 37% (19) for a private room. Majority (84%) of these properties are listed on AirBnB, 12% are listed on HomeAway, and 4% are listed on both.





Hattiesburg, MS STR Data Analysis - Young Strategies purchased lodging data from STR for the hotel/motel properties located in Hattiesburg, MS in the form of a 6-year trend report and a 365-daily data report for all STR-participating hotel/motel properties. All tables and charts following reflect the STR data provided in these two reports.

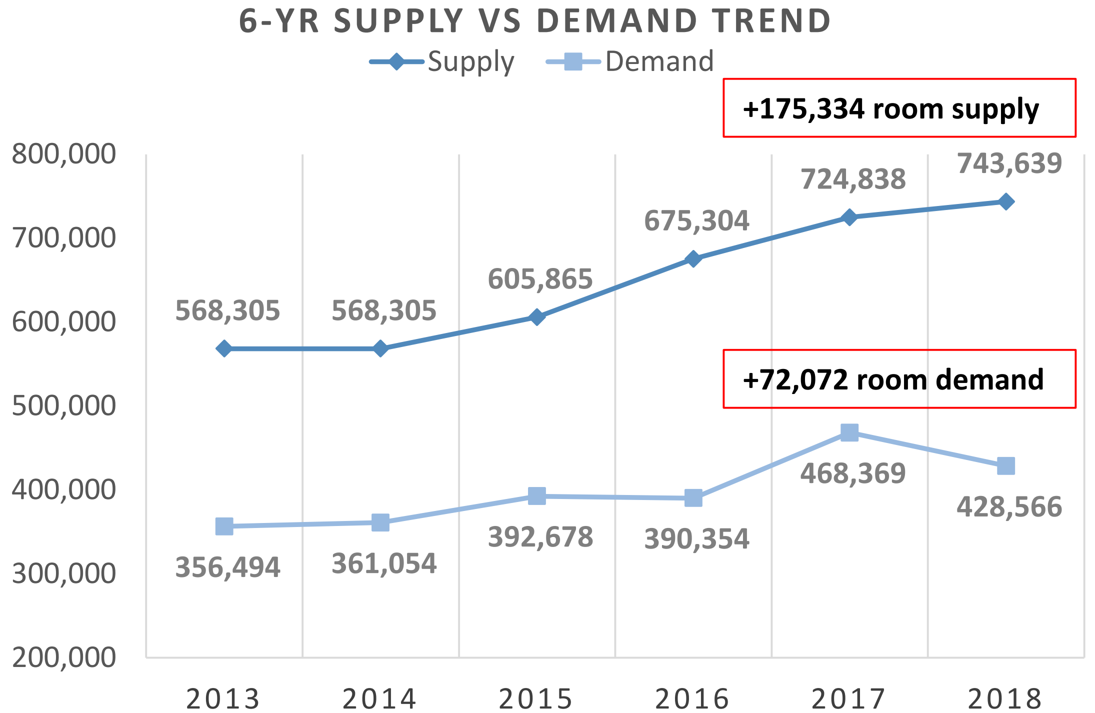
Supply vs. Demand 2013 - 2018				
	Supply	% Chg	Demand	% Chg
2013	568,305	~	356,494	~
2014	568,305	0.0%	361,054	1.3%
2015	605,865	6.6%	392,678	8.8%
2016	675,304	11.5%	390,354	-0.6%
2017	724,838	7.3%	468,369	20.0%
2018	743,639	2.6%	428,566	-8.5%

Source: STR

With all the new hotel development 2015 through 2018, Hattiesburg's room supply had increased by 175,334 rooms in 2018 as compared to 2013. Room demand however was fluctuating over the same time-period, some years outpacing the new growth in supply, while other years struggling to keep up as in 2016 and 2018.

Observations:

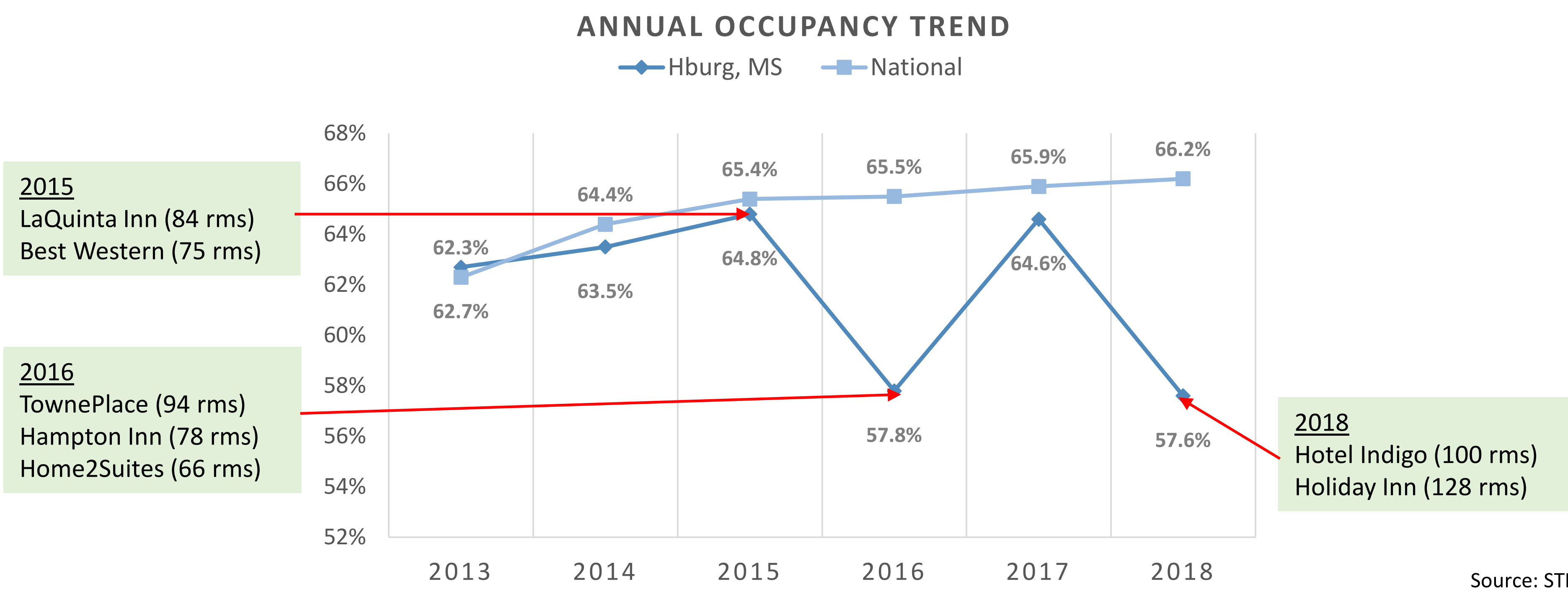
- Room supply had an overall increase of 30.9% in 2018 as compared to 2013.
- Hattiesburg experienced explosive growth in their lodging room supply over the last four years with the opening of eight chain-affiliated hotels accounting for 23.4% of room inventory with 700 rooms.
- Room demand had an overall increase of 20.2% in 2018 as compared to 2013. Hattiesburg's room demand has fluctuated over the last 6 years with demand up in 2014 and 2015, slightly down in 2016, followed by a 20% increase in 2017 and then down again by 8.5% in 2018.



Annual Occupancy Trend 2013 - 2018				
	Hattiesburg	**% of Chg**	**National**	**% of Chg**
2013	62.7%	~	62.3%	~
2014	63.5%	1.3%	64.4%	3.4%
2015	64.8%	2.0%	65.4%	1.6%
2016	57.8%	-10.8%	65.5%	0.1%
2017	64.6%	11.8%	65.9%	0.9%
2018	57.6%	-10.8%	66.2%	0.5%

Observations:

- As previously seen in the 6-YR table for room supply vs. room demand, Hattiesburg had consistent increases in their lodging room supply during the 4-year time period of 2015 – 2018 while room demand was fluctuating during the same time period. Demand was slightly down in 2016 and 2018, thus occupancy showed a declining trend during the same time period. 2017's occupancy influx could be attributed to new marketing campaigns initiated in 2016, severe weather occurrences (Hurricane Nate, storms, tornado, etc.) driving displaced homeowners as well as crews and construction workers into all available lodging. While 2018 shows another decline in occupancy, it must be noted that more rooms were sold in 2018 than 2013, 2014, 2015 and 2016.

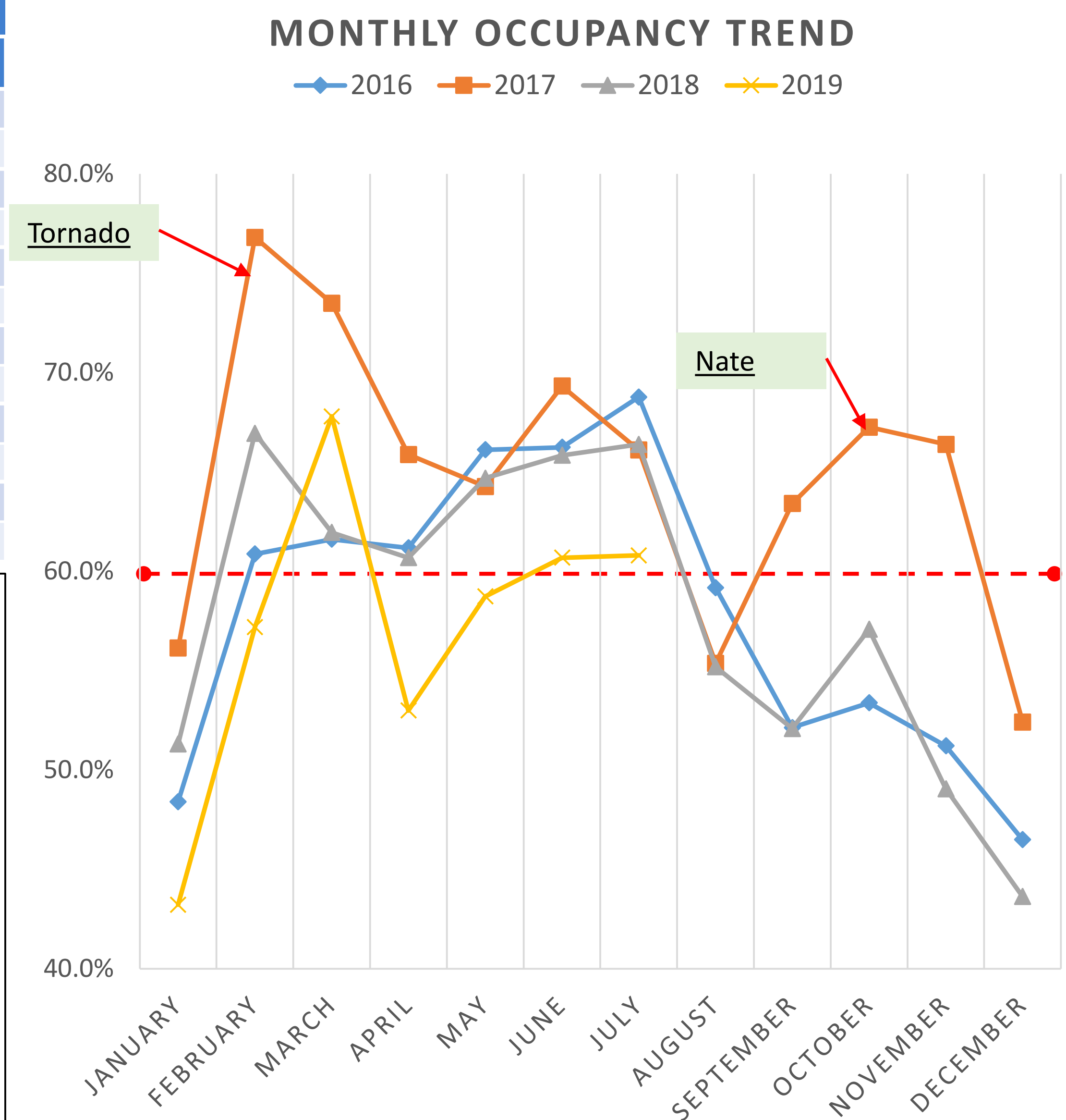


Source: STR

Hattiesburg Monthly Occupancy Trend				
	2016	2017	2018	2019
January	48.4%	56.1%	51.3%	43.2%
February	60.9%	**76.8%**	**66.9%**	57.2%
March	61.6%	73.5%	62.0%	67.8%
April	61.2%	65.9%	60.7%	53.0%
May	66.1%	64.3%	64.7%	58.7%
June	66.2%	69.3%	65.8%	60.7%
July	**68.8%**	66.1%	66.4%	60.8%
August	59.2%	55.4%	55.2%	
September	52.1%	63.4%	52.1%	
October	53.4%	67.3%	57.1%	
November	51.2%	66.4%	49.1%	
December	**46.5%**	**52.4%**	**43.6%**	

Monthly Occupancy Trends

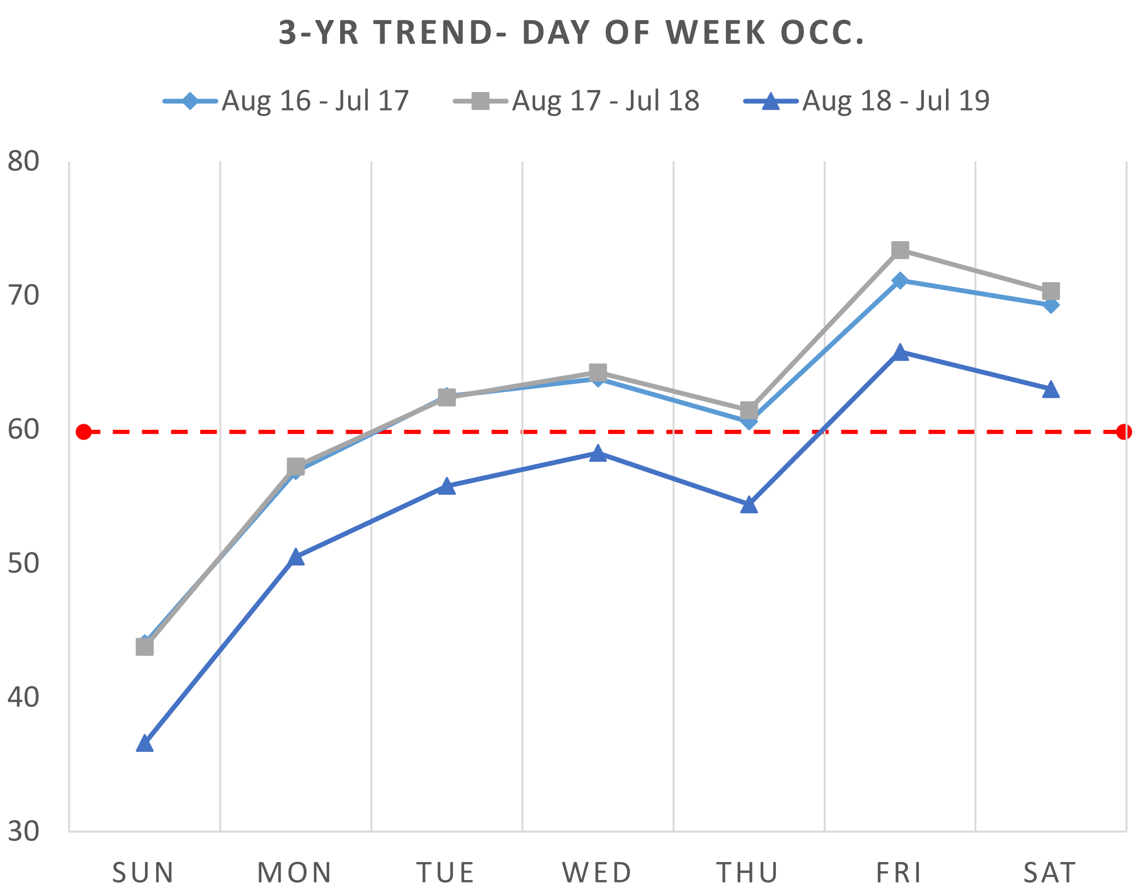
- Highest occupancy has fluctuated over the last several years between February and July (2016-2018), while March was recorded as the highest month of occupancy thus far in 2019.
- Significant development in room supply during this 4-year time period, coupled with some fluctuating room demand has caused a declining trend in occupancy in both 2018 and 2019 over 2017. It is crucial to note however, more room nights were sold in both 2018 and 2019-YTD over room demand in 2013, 2014, 2015 and 2016.
- Need periods are consistently the month of January as well as August through December, as these months are all typically below the critical mark of 60% occupancy.



Source: STR

Three Year Occupancy (%)

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Aug 16 - Jul 17	44.0	56.9	62.5	63.8	60.6	71.1	69.3
Aug 17 - Jul 18	43.8	57.2	62.4	64.3	61.4	73.4	70.3
Aug 18 - Jul 19	36.6	50.5	55.8	58.3	54.4	65.8	63.0
Total 3 Yr	**41.3**	**54.7**	**60.1**	**61.9**	**58.7**	**69.9**	**67.4**



Source: STR

Observations:

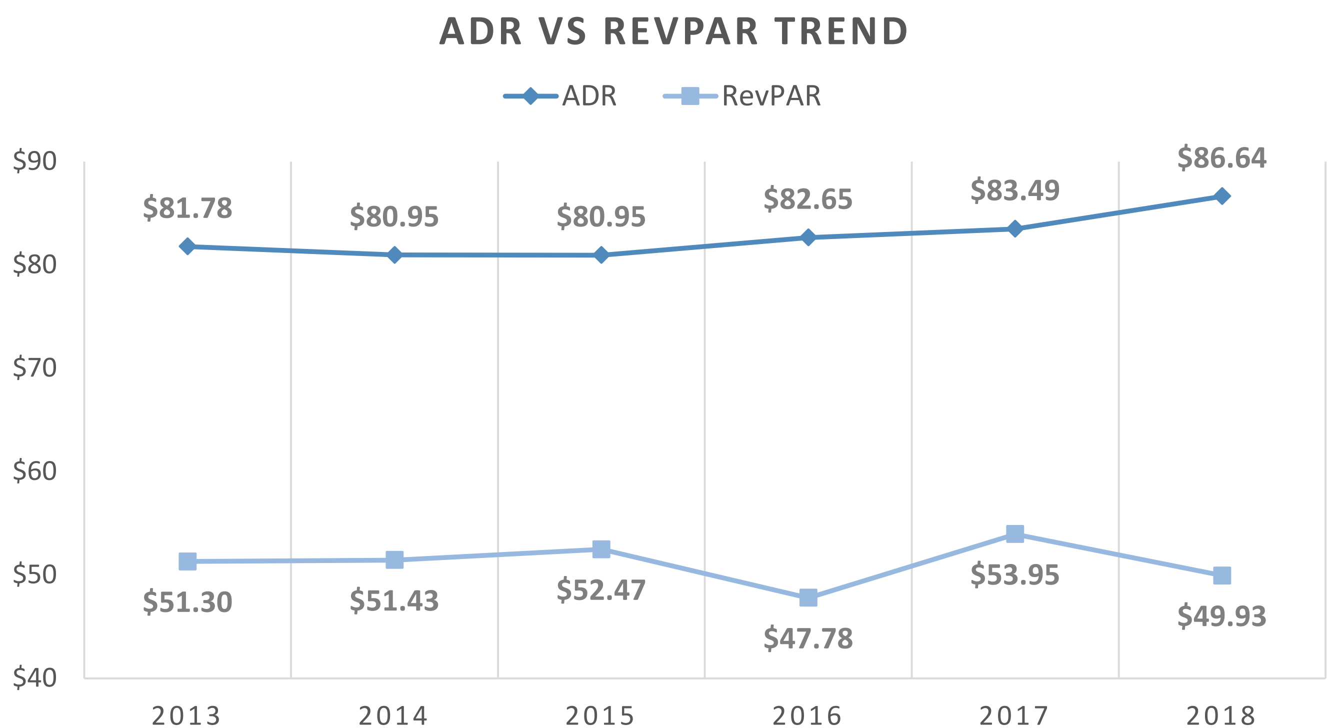
- Data shows Friday and Saturday nights run highest occupancy in the 63.0% - 65.8% range over the previous 12-months, followed by the weekdays, Tuesday and Wednesday nights at 55.8% - 58.3%.
- This data is very reflective of the market segmentation data collected in the YSI survey, whereas weekend room demand was reported by Hattiesburg hoteliers as follows: the combined leisure transient segments (29.8%) along with the combined group market at 23.1%. Midweek demand is being driven by the individual business travelers, government /military, skilled workers and medical-related travel.

More rooms must be sold for a healthy lodging industry to thrive and a long-term marketing strategy must be developed to sell more rooms every night of the week throughout the year. This will take a cooperative effort by VisitHATTIESBURG, the Convention Commission and their lodging partners working together to sell the need periods in Hattiesburg's lodging.

ADR vs. RevPAR 2013 - 2018				
	ADR	% of Chg	RevPAR	% of Chg
2013	$81.78	~	$51.30	~
2014	$80.95	-1.0%	$51.43	0.3%
2015	$80.95	0.0%	$52.47	2.0%
2016	$82.65	2.1%	$47.78	-8.9%
2017	$83.49	1.0%	$53.95	12.9%
2018	$86.64	3.8%	$49.93	-7.4%

Observations:

- As shown in the table, the ADR (Average Daily Rates) for the STR-participating Hattiesburg properties stayed relatively stable over the 5-year period of 2013 to 2017, with only slight variances of 1% - 2%.
- Increased room supply, combined with decreasing room demand, lead Hattiesburg's hoteliers to respond to tense market conditions by increasing ADR in 2016, 2017 and 2018. While this helped to keep revenues stable, the decrease in demand negatively affected RevPAR (Revenue Per Available Room) in both 2016 and 2018, while also causing a decrease in revenue in 2018. This is not a sustainable long-term strategy.



Source: STR

STR Hotel/Motel 6-YR Revenue Trend

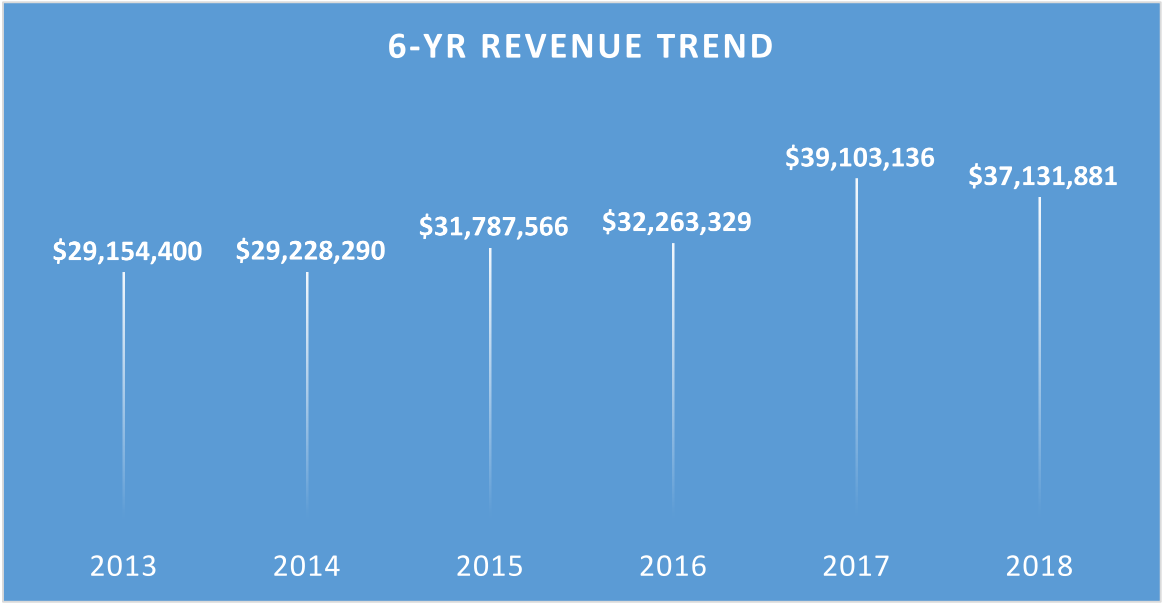
STR reports the total annual lodging revenue generated by the Hattiesburg STR-participating properties over the 6-year period 2013-2018 as follows in the table and graph below.

Annual Revenue Trend 2013 - 2018			
	Revenue		% Chg
2013	$	29,154,400	~
2014	$	29,228,290	0.3%
2015	$	31,787,566	8.8%
2016	$	32,263,329	1.5%
2017	$	39,103,136	21.2%
2018	$	37,131,881	-5.0%

Observations:

- The Hattiesburg STR-participating properties experienced a positive trend in revenue collection over the 5-year time period of 2013 – 2017; there was a 5% decline in 2018's revenue. As the table and graph illustrate, raising ADR as a response to a very slight decrease in demand in 2016 resulted in stabilizing revenue that year. This was followed by a year with a significant spike in demand which resulted in a double-digit increase (21.2%) in room revenue in 2017. While room revenue fell in 2018, it must be noted that more rooms were sold in 2018 than in 2013, 2014, 2015 and 2016.

VisitHATTIESBURG, the Convention Commission and their lodging partners must continue working together to market the destination and ensure more rooms are being sold to drive revenue growth.



Source: STR

Hattiesburg's Market Segmentation – YSI Hotel Survey

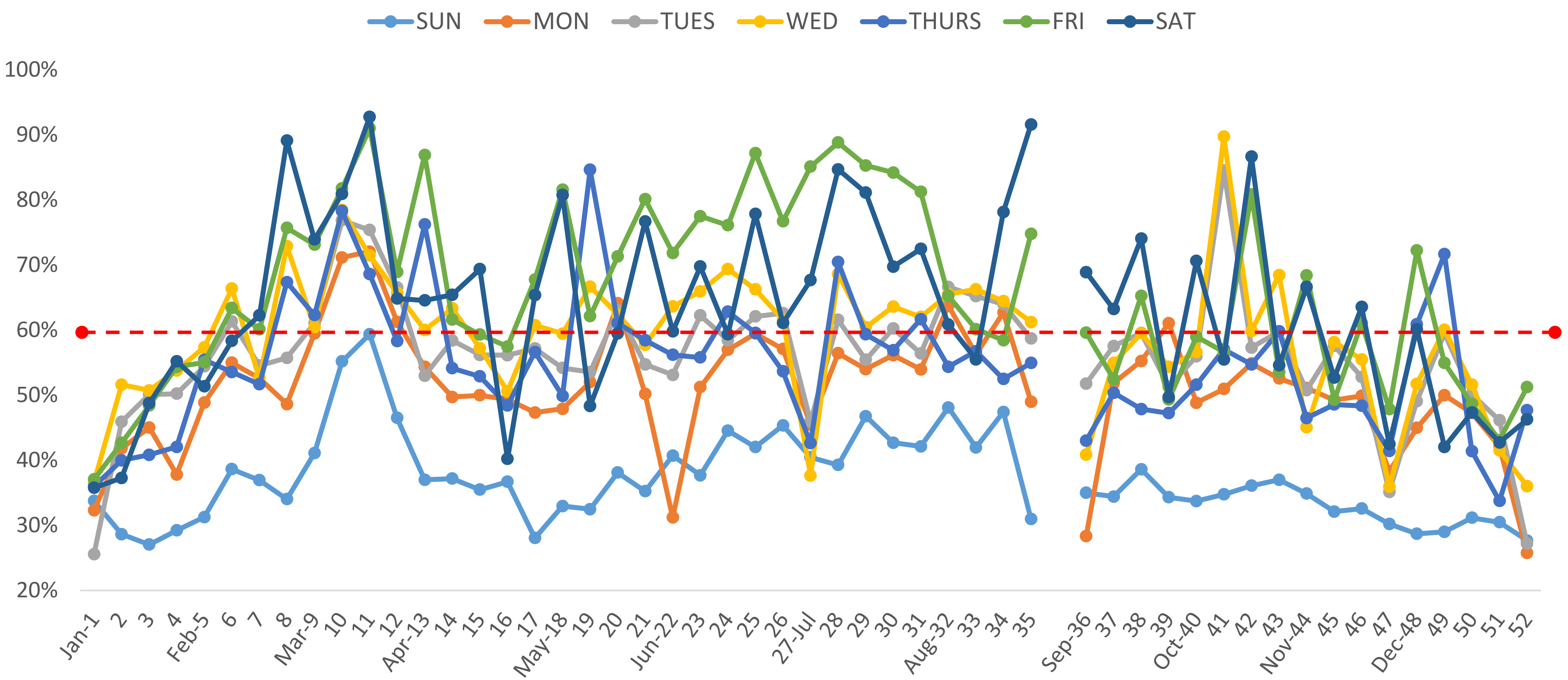
The YSI survey of Hattiesburg hoteliers revealed the market segments that are driving overnight visitation within the destination. Corporate and group business are tracked closely by rate codes, while leisure segment data is often collected by the management team at the individual properties. Rank order is shown in table below. **A total of fourteen properties participated in the YSI survey, thus providing an overall response rate of 56.9%.**

2018	Hattiesburg, MS Market Segmentation
54.8%	**Business / Gov't / Medical - Transient**
22.6%	Business travelers (individuals)
13.4%	Government / Military
7.3%	Skilled workers (long term labor – construction)
3.8%	Medical-related
29.8%	**Leisure - Transient**
12.8%	Tourists visiting the area (local attractions, shopping, events, visiting friends/relatives, etc.)
9.3%	Pass-through / Other
7.7%	University-related
23.1%	**Groups / Conferences / Meetings**
7.4%	SERF -- social, educational, religious, fraternal
6.9%	Team Sports / Tournaments
4.0%	Conferences / Meetings / Associations
3.9%	Government / Military
0.9%	Group Tour / Motorcoach

Observations:

- More than half (54.8%) of Hattiesburg's lodging demand is being driven by the combined business transient segments of individuals traveling for: business, government/military, long-term labor/construction and medical-related reasons.
- The combined leisure transient segments of tourists, which includes VFR (visiting friends & relatives), people passing through the area and university-related travelers accounted for just under one-third of the room nights in Hattiesburg (29.8%) of the overall lodging market room demand.
- The combined group/conference/meeting segments account for the remaining 23.1% of room nights sold.
- STR data supported these findings with Friday and Saturday nights running highest occupancy, followed closely by Tuesday and Wednesday nights. Leisure transient and the combined group markets primarily filling both the weekend and weekday nights, while the combined business transient market segments most likely accounting for a majority of the mid-week room demand.

52 Week Occupancy Trend
January - August, 2019 & September - December, 2018

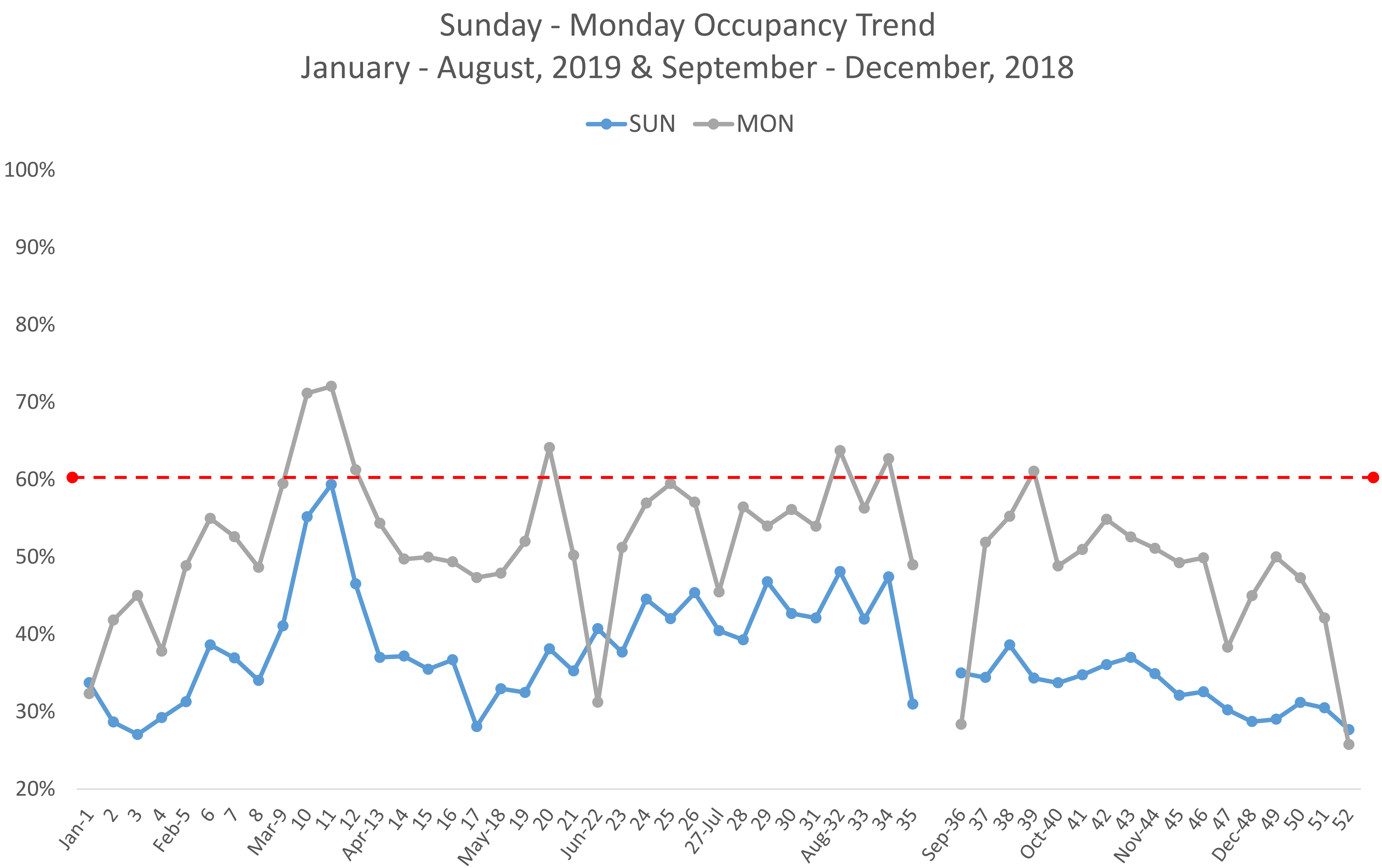


Source: STR

Daily Occupancy %'s	# of days	% of YR
Days reported at 60% - 69%	84	23.0%
Days reported at 70% - 79%	29	8.0%
Days reported at 80% - 89%	19	5.2%
Days reported at 90% - 100%	4	1.1%

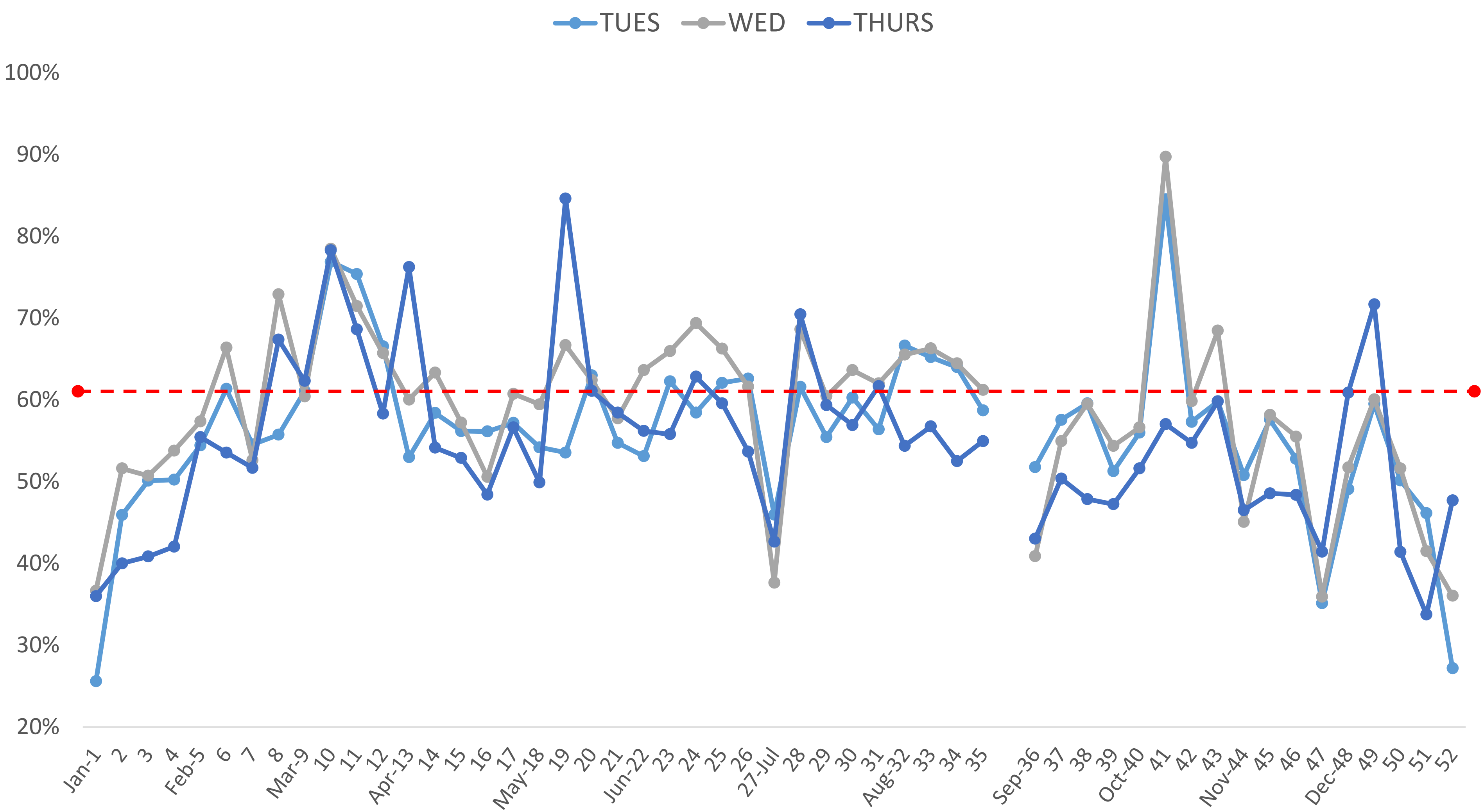
Total # of Days 60% or higher occupancy

136 nights = 37.3% of the year


Sunday - Monday Occupancy Trend
January - August, 2019 & September - December, 2018
SUN
MON
100%
90%
80%
70%
60%
50%
40%
30%
20%
Jan-1
Feb-5
Mar-9
Apr-13
May-18
Jun-22
27-Jul
Aug-32
Sep-36
Oct-40
Nov-44
Dec-48
52

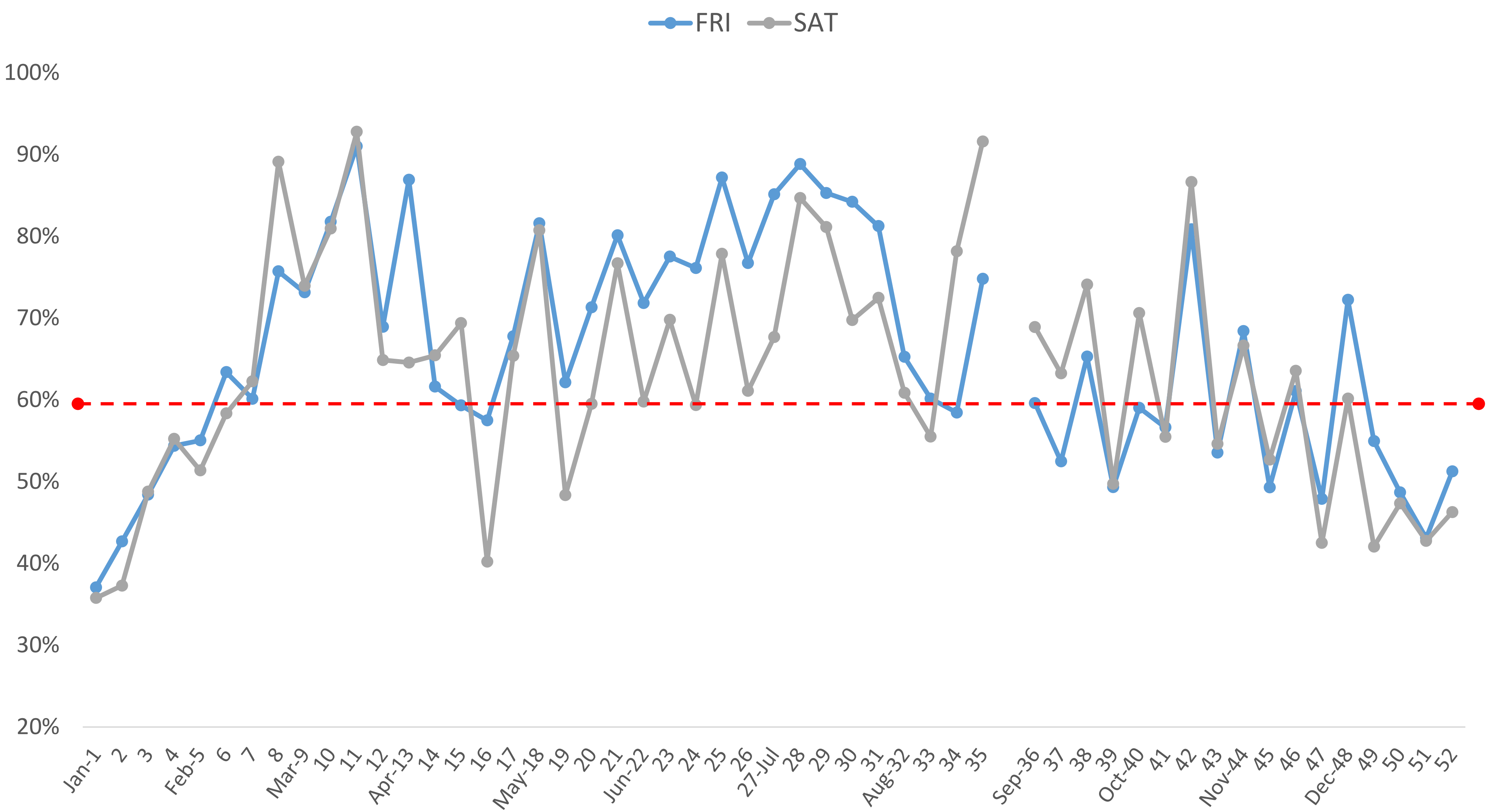
Source: STR

Midweek (Tuesday - Thursday) Occupancy Trend
January - August, 2019 & September - December, 2018



Source: STR

Weekend (Friday - Saturday) Occupancy Trend
January - August, 2019 & September - December, 2018



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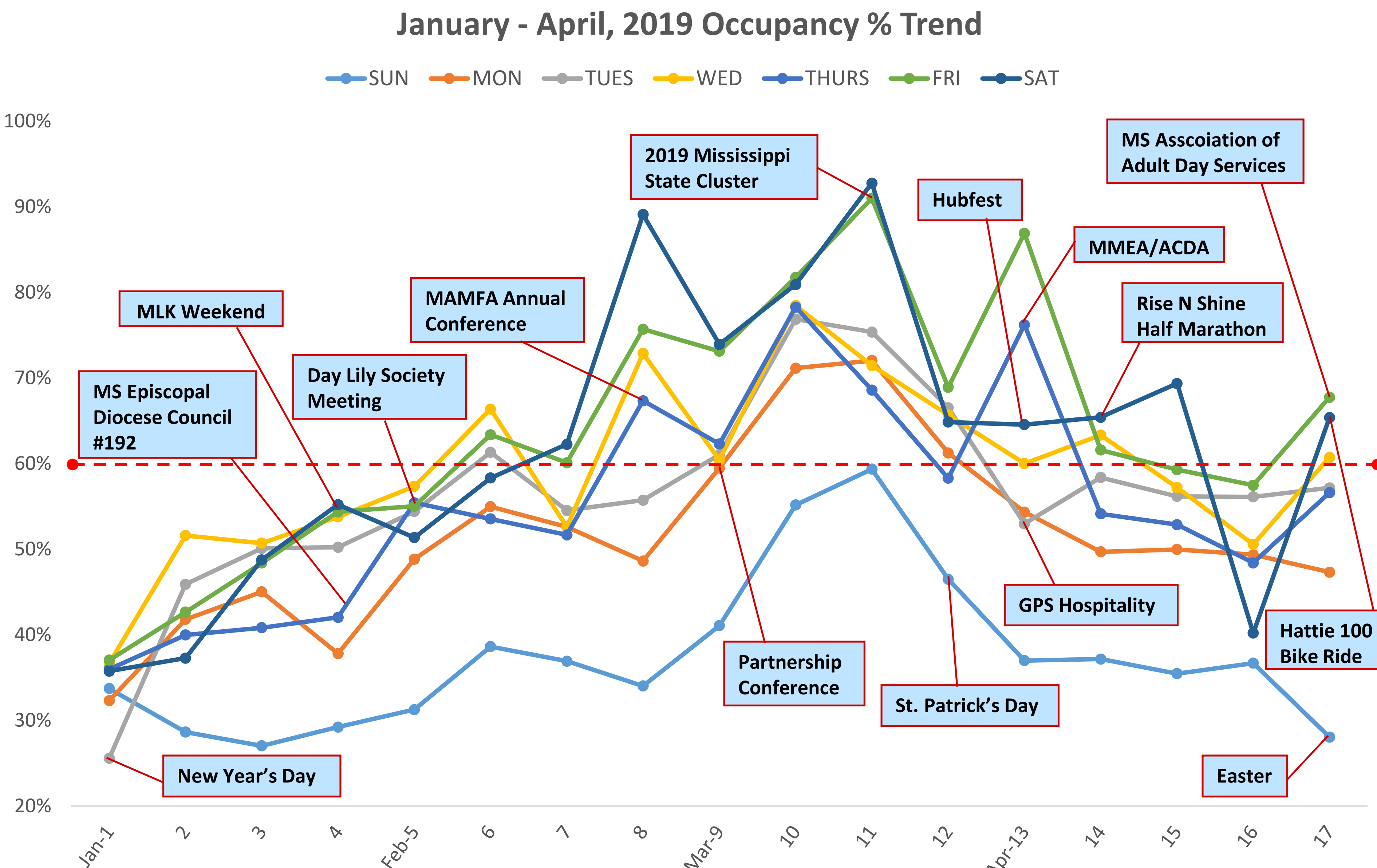
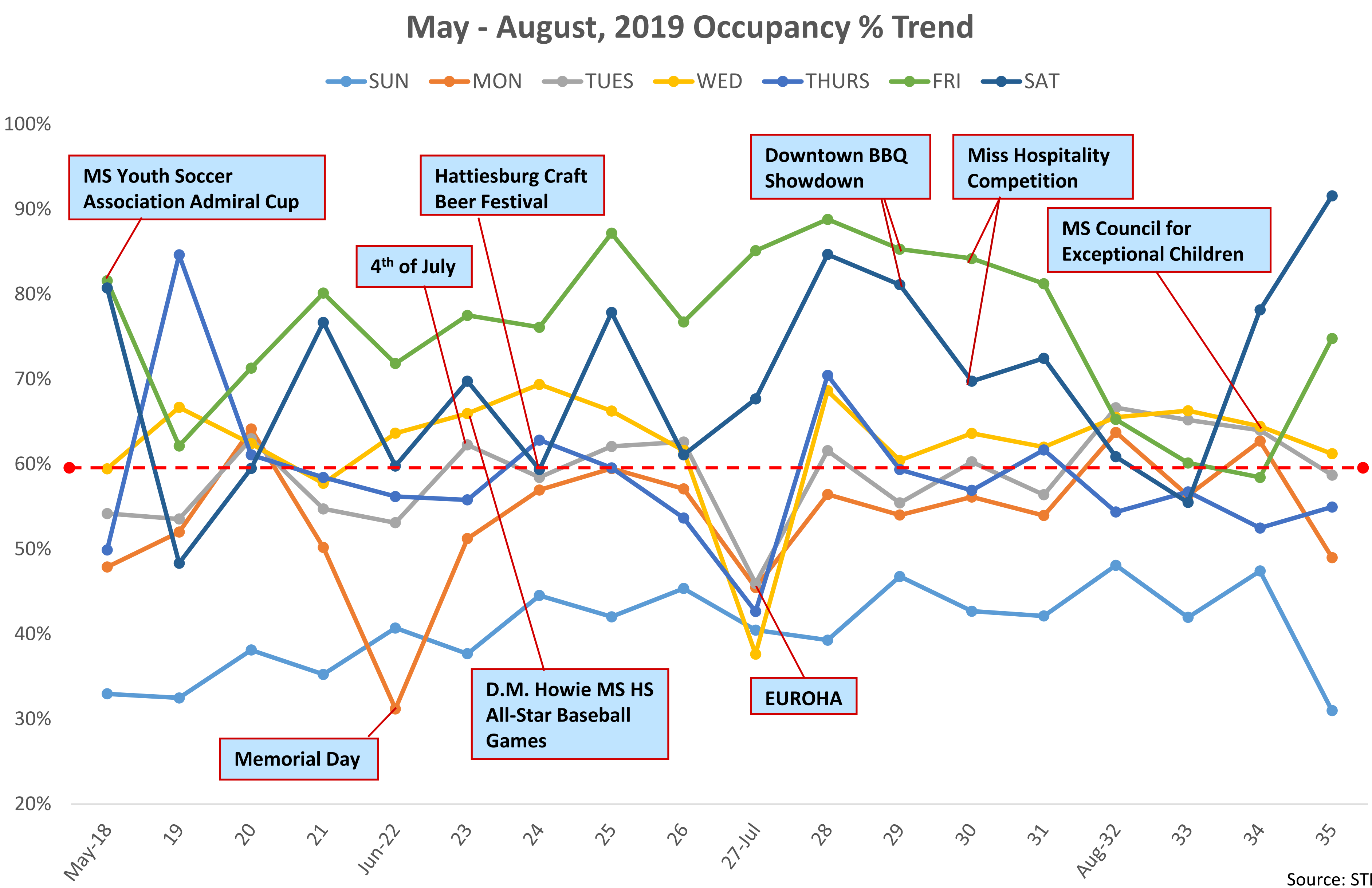
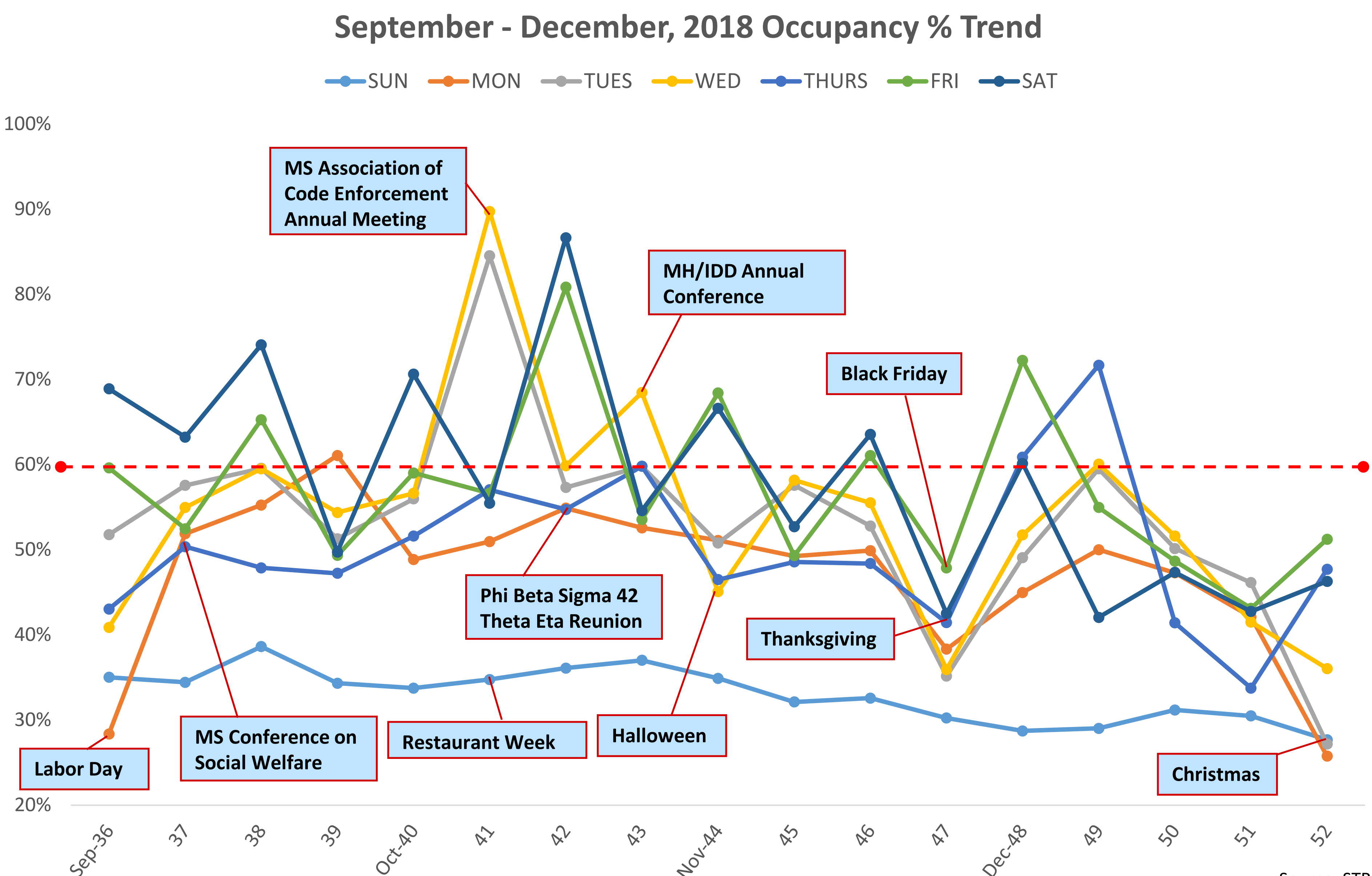

January - April, 2019 Occupancy % Trend
SUN
MON
TUES
WED
THURS
FRI
SAT
100%
90%
80%
70%
60%
50%
40%
30%
20%
2019 Mississippi State Cluster
MS Asscoiation of Adult Day Services
Hubfest
MMEA/ACDA
MAMFA Annual Conference
MLK Weekend
Rise N Shine Half Marathon
Day Lily Society Meeting
MS Episcopal Diocese Council #192
GPS Hospitality
Hattie 100 Bike Ride
Partnership Conference
St. Patrick's Day
New Year's Day
Easter
Jan-1
2
3
4
Feb-5
6
7
8
Mar-9
10
11
12
Apr-13
14
15
16
17

Source: STR


May - August, 2019 Occupancy % Trend
SUN
MON
TUES
WED
THURS
FRI
SAT
100%
90%
80%
70%
60%
50%
40%
30%
20%
MS Youth Soccer Association Admiral Cup
Hattiesburg Craft Beer Festival
4th of July
Downtown BBQ Showdown
Miss Hospitality Competition
MS Council for Exceptional Children
Memorial Day
D.M. Howie MS HS All-Star Baseball Games
EUROHA
May-18
19
20
21
Jun-22
23
24
25
26
27-Jul
28
29
30
31
Aug-32
33
34
35

Source: STR


September - December, 2018 Occupancy % Trend
SUN
MON
TUES
WED
THURS
FRI
SAT
100%
90%
80%
70%
60%
50%
40%
30%
20%
MS Association of Code Enforcement Annual Meeting
MH/IDD Annual Conference
Black Friday
Phi Beta Sigma 42 Theta Eta Reunion
Thanksgiving
MS Conference on Social Welfare
Restaurant Week
Halloween
Labor Day
Christmas
Sep-36
37
38
39
Oct-40
41
42
43
Nov-44
45
46
47
Dec-48
49
50
51
52

Source: STR

Leisure Feeder Markets

Hoteliers were asked to list the top four cities that ranked as top leisure feeder markets in the prior twelve months. The markets are ranked by the total number of responses by hoteliers and their top responses are provided in the table below.

Top Leisure Feeder Markets	# of Responses
1. Jackson, MS (80 miles)	6
1. New Orleans, LA (113 miles)	6
3. Mobile, AL (94 miles)	5
4. Biloxi, MS (74 miles)	4
4. Birmingham, AL (233 miles)	4

Source: YSI survey of Hattiesburg lodging properties

Challenges in Marketing

Lodging property managers/owners were asked what their biggest challenge is in marketing their lodging property.

14 properties responded; verbatim comments are below:

- Being competitive in the rate. Our budget is much higher than what our competition is, so they have a lower rate on their hotel rooms.
- Budget and manpower
- Decreased demand and increase of inventory.
- Finding extended stay needs in the market.
- The guests are not real familiar with our brand.
- No free breakfast at our property or pool. We are extend stay so we are not meant for as much leisure
- None
- Not having a meeting room is a big challenge for this location.
- Number of competition rooms and state of disrepair of existing properties.
- We have a different product than the rest of the other properties.
- The abundance of similar branded hotels in the area.
- There is a surplus of hotels in the area that offer complimentary breakfast, as we do not.
- This year our challenge has to do property renovations. Also the decrease in demand with increase in rooms.
- Too much of competition.

Major Shifts / Changing Trends

Lodging property managers/owners were asked about their anticipation of 2019 occupancy and room demand.

14 properties responded

Do you anticipate 2019 annual occupancy to be UP or DOWN?	
Down	71.4%
Up	28.6%

Do you anticipate any changes in room demand? Please be specific.
11 properties responded; verbatim comments are below:

- As per trend, we have seen a decrease in government and corporate but no additional pick up in other market segments to make up for that loss.
- Demand seems to already be down for 2019. USM adjusted their schedule which has impacted hotels in the area as well.
- N/A
- New hotels coming to the market
- No (3)
- We anticipate demand during the summer for tournaments and Camp Shelby trainings, as well as when the new Kohler Engines plant is finished with their transition.
- This year we have seen a significant drop in occupancy. Additional rooms added to the local market is approx. 220 but the demand is less also which results in the ADR to start dropping also. This trend has been going on all year. Historically this market peaks in June and July.
- We are expecting business to pick up in the fall due to the universities in the area starting again.

Hotel/Motel Future Sales and Marketing Suggestions for VisitHATTIESBURG

Lodging property managers/owners were also asked to provide any suggestions on how VisitHATTIESBURG could assist their property in terms of sales and marketing in the coming year.

10 properties responded; verbatim comments are below:

- Any construction companies or companies who work in the area for extend time send them our way.
- Focus on marketing to corporate businesses and government entities.
- Marketing, bringing more groups, conventions, events, promoting etc.
- Need to better showcase tourist attractions. Need to have convention commission actually proactively sell the convention center. Need to be better coordinated with sporting/social events to not have them all occur on the same weekend.
- Need to focus on sports marketing which is a growing segment for our area. Also, more focus on corporate business since we see more of that than leisure or group travel.
- None
- Paige and Marlo are absolutely fantastic at what they do, we participate in all sales blitzes, we should keep doing them. I can't wait to hear about new opportunities for our sales efforts.
- Promote a professional environment to our business travelers
- Providing leads for sleeping rooms associated with meeting space needs.
- You do a great job. I get some good leads.

VISIT HATTIESBURG

Visitor Profile Research

HBURG

YOUNG strategies, inc.

fresh. travel. research.

Purpose

The Hattiesburg Tourism Commission retained Young Strategies Inc. to conduct research to develop a visitor profile for tourism growth in Hattiesburg, MS.

Methodology

An online survey instrument was prepared by the Young Strategies research team and approved by the Visit Hattiesburg staff. Recipients were invited to take a visitor survey and be entered into a chance to win one of two $250 VISA gift cards.

The survey was deployed through web-links, email invitations and Facebook invitations provided to Visit Hattiesburg and their industry partners. The following unique weblinks to the survey were deployed and generated the number of survey responses as indicated following their names: Arts Groups – 471; Visit Hattiesburg Database – 304; Pinebelt Foundation – 159; Sports/Outdoors Groups – 139; Merit Wesley – 120; Downtown Hattiesburg Association – 86; Hattiesburg Hotels – 68; University of Southern Mississippi – 51; City of Hattiesburg – 36; Hattiesburg Restaurants – 35; Forrest General – 17; Area Development Partnership – 7; Midtown Merchants Association – 5; Venues and Attractions – 1.

SURVEY RESPONSES:

- 307 were visitors to the Hattiesburg, MS area in the last 3 years
- 808 were Forrest/Lamar/Perry Counties / City of Hattiesburg area residents
- 249 were residents of the Southeastern/Gulf Coast region of Mississippi
- 13 had not visited the Hattiesburg, MS area in the last 3 years



Visitor Profile

Daytrip N= 216
Overnight N = 166

Overall Survey Respondent Demographics

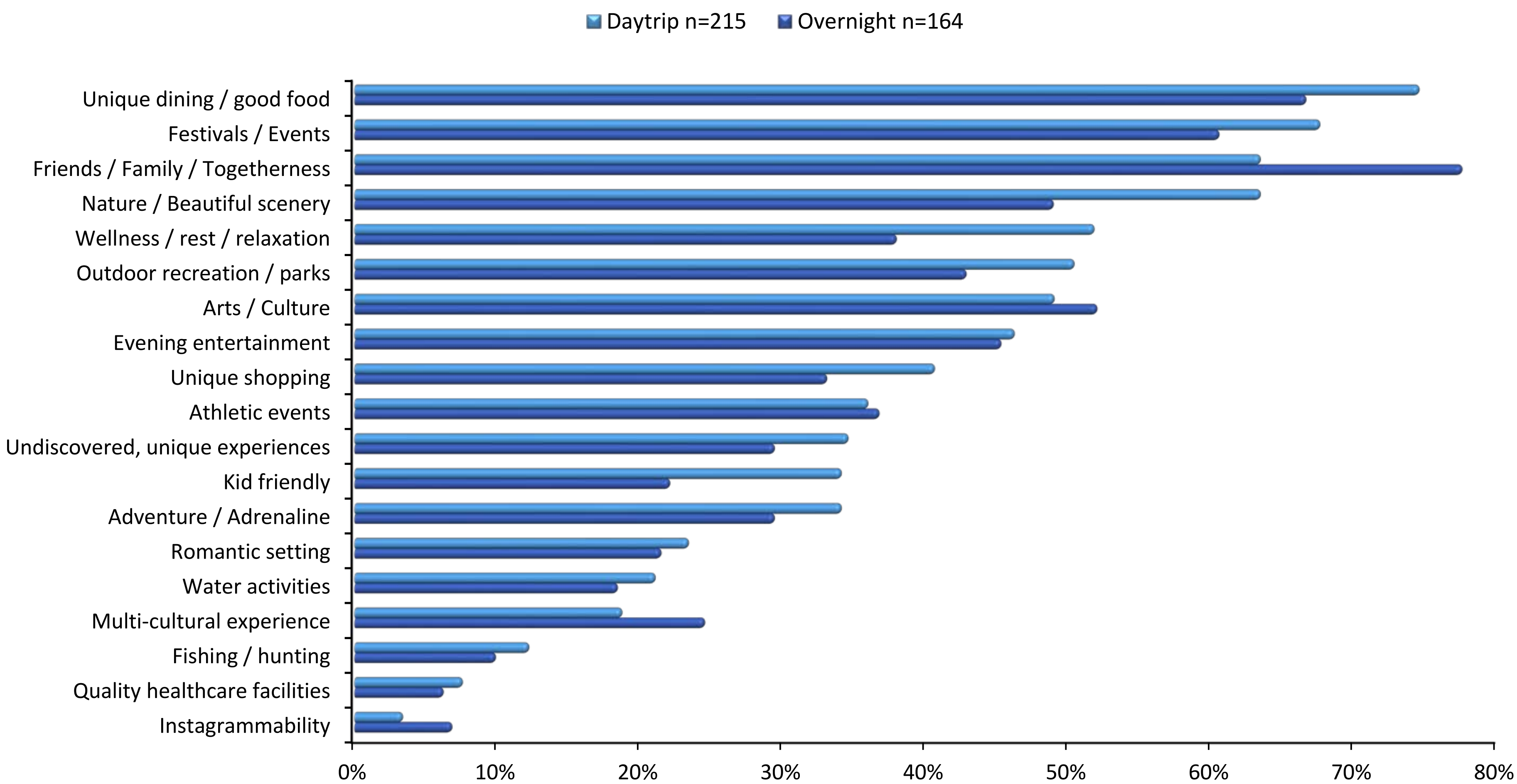
Respondent Demographics	Daytrip n=192	Overnight n=149
Generational Group **Average Age:** **Daytrip– 47.7 years old** **Overnight – 50.1 years old**	Teens - 0.0% Twenties – 13.5% **Thirties – 21.9%** Forties – 16.1% **Fifties – 22.9%** Sixties – 18.2% Seventies – 6.8% Eighties - 0.5%	Teens – 1.3% Twenties – 12.1% Thirties – 15.4% Forties – 16.8% **Fifties – 22.1%** **Sixties – 21.5%** Seventies – 8.7% Eighties – 2.0%
Gender		
Female	**69.8%**	**63.8%**
Male	**28.7%**	**35.6%**
Prefer not to answer	1.0%	0.7%
Other	0.5%	0.8%
Occupation	**Education-professor/teacher – 14.8%** **Healthcare industry – 13.7%** **Retired – 7.1%** **Banking/Financial – 5.5%**	**Retired – 13.9%** **Education-professor/teacher – 12.5%** **Healthcare industry – 11.8%** **Executive/manager – 7.6%**
Level of Education		
College Degree	**40.1%**	**47.6%**
Graduate School	30.7%	37.4%
Some College	19.3%	8.8%
Ethnicity		
White/Caucasian	**89.6%**	**86.5%**
Black or African American	7.3%	6.1%
Prefer not to answer	4.2%	6.1%
American Indian or Alaskan Native	1.6%	0.0%
Asian or Pacific Islander	0.5%	0.7%
Hispanic or Latino	0.5%	2.0%

Important Attributes of a Destination

Please tell us which of the following are important when selecting a getaway / vacation destination.

Observations:

- Daytrip visitors reported unique dining/good food and festivals/events as the most important attributes when selecting a getaway/vacation destination. Overnight visitors reported friends/family/togetherness followed by unique dining/good food as most important.

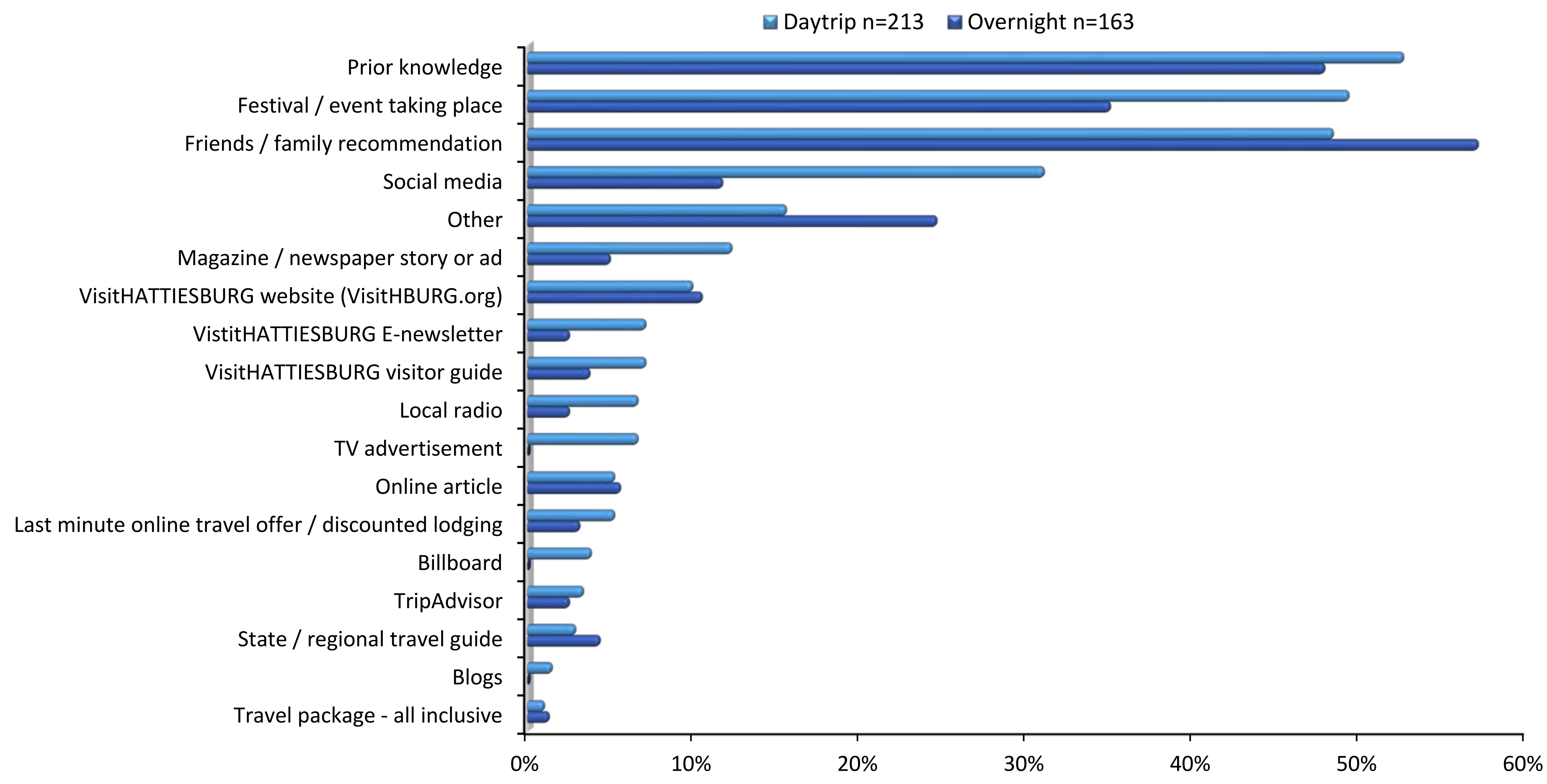


Planning Influencers

Please select any of the following that influenced or inspired your selection of the Hattiesburg, MS area for a travel purpose.

Observations:

- Both daytrip and overnight respondents reported prior knowledge, festival/event taking place, and friend/family recommendation as the top sources of influence on their selection of Hattiesburg as their travel destination. This data indicates there is an opportunity to improve the awareness and use of the VisitHATTIESBURG website and travel guide as a source of inspiration for travelers to Hattiesburg.



Local Information

Once you've arrived at your destination, where do you go for local information on dining, shopping, activities? Rate on a scale of 1 to 4, where 4 is frequently, 3 is sometimes, 2 is rarely and 1 is never.

Observations:

- Both daytrip and overnight segments reported the highest reliance on online internet searches on smartphones, tablets, laptops and computers to find information on dining, shopping and activities.

Daytrip n=214	Frequently	Sometimes	Rarely	Never	Weighted Average
Online internet search (computer / tablet)	**70.8%**	20.3%	3.8%	5.2%	**3.57**
Recommendation from local	**45.3%**	**41.0%**	9.4%	4.3%	**3.27**
Mobile phone app for local information	**48.3%**	26.3%	11.0%	14.4%	**3.09**
Pick up a travel guide	11.4%	34.8%	26.9%	26.9%	**2.31**
Hotel or rental front desk / concierge	15.7%	30.9%	21.6%	31.9%	**2.3**
Look for a visitor center	10.0%	24.9%	28.4%	36.8%	**2.08**

Overnight n=164	Frequently	Sometimes	Rarely	Never	Weighted Average
Online internet search (computer / tablet)	**76.9%**	14.4%	3.1%	5.6%	**3.63**
Recommendation from local	**60.7%**	**30.7%**	5.5%	3.1%	**3.49**
Mobile phone app for local information	**44.2%**	**32.5%**	9.1%	14.3%	**3.06**
Hotel or rental front desk / concierge	18.3%	**40.5%**	18.3%	22.9%	**2.54**
Pick up a travel guide	14.6%	30.5%	31.8%	23.2%	**2.36**
Look for a visitor center	13.1%	27.5%	31.4%	28.1%	**2.25**

Local Information

Once you've arrived at your destination, where do you go for local information on dining, shopping, activities? Rate on a scale of 1 to 4, where 4 is frequently, 3 is sometimes, 2 is rarely and 1 is never.

If you use mobile apps, please tell us specifically which apps you use while traveling:

DAYTRIP

- AirBnB, Yelp, google
- Booking and vrbo
- Eventbrite, local
- Facebook (2)
- Furkot
- Gas buddy
- **Google (6)**
- **Google maps (12)**
- Google or bing
- IG, google reviews
- Instagram
- Kayak and Travel Advisor
- Local Eats
- Local Websites if available
- Maps (5)
- Navigation
- OpenTable
- Ticketmaster
- **Trip Advisor (20)**
- Waze (3)
- **Yelp (18)**

OVERNIGHT

- Air bnb (2)
- Around me
- Booking.com
- Dine, Zomato, and Open Table
- Google (7)
- Google Maps (2)
- HomeAway
- Open Table (7)
- Past visit experience
- Priceline
- Reddit
- **TripAdvisor (12)**
- VRBO
- **Yelp (20)**
- Zomato (food), Waze (directions), Facebook, Instagram

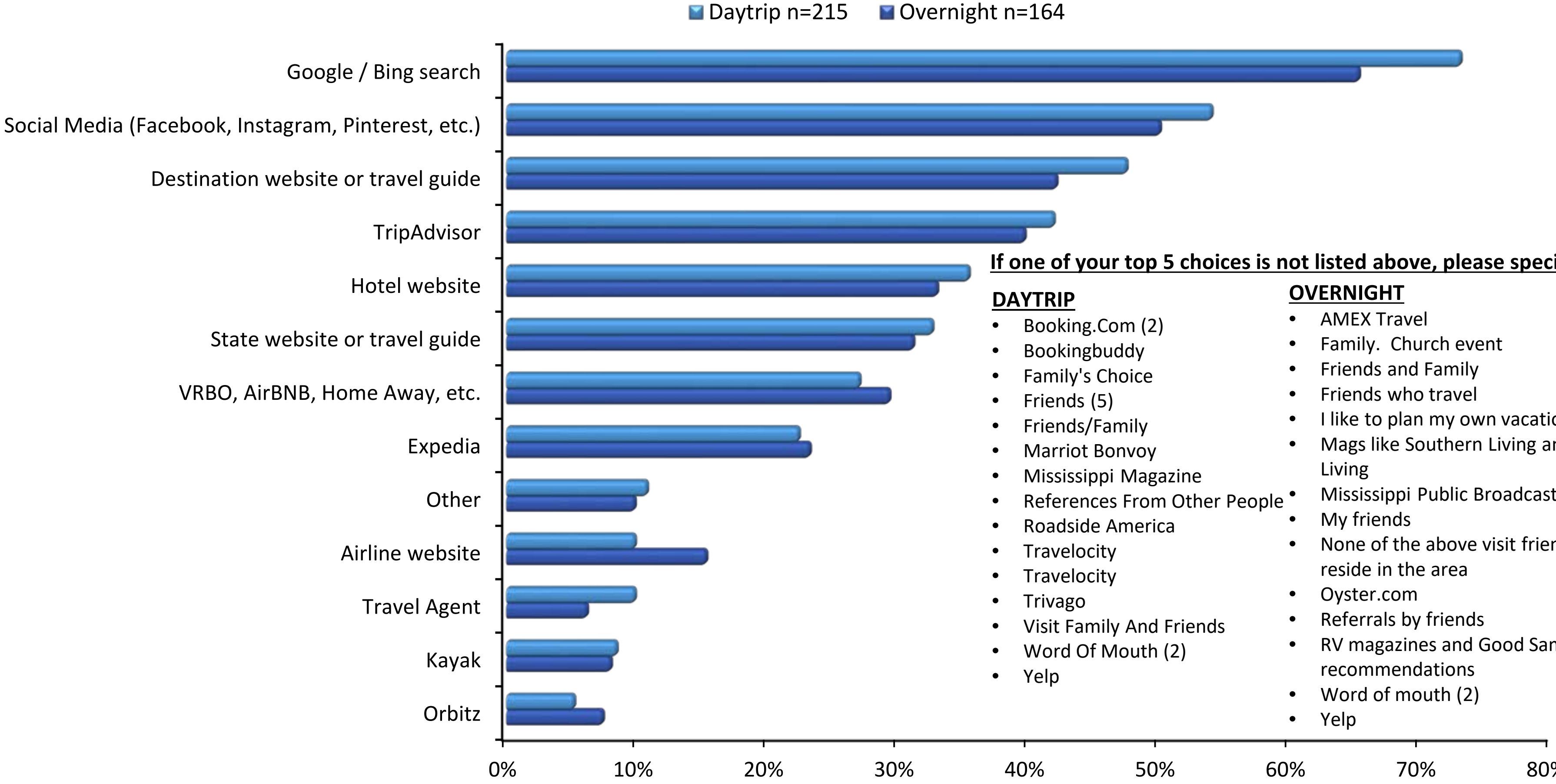
Preferred Planning Sources

Tell us your preferred sources when planning a vacation / getaway.

Choose 1st choice for most desirable, 2nd choice for second most desirable, etc. until all you have rated your top 5 choices.

Observations:

- Both daytrip and overnight respondents reported a Google/Bing search, social media, and a destination website or travel guide as preferred sources for vacation/getaway planning. It is positive to see the destination website or travel guide in the top 3 planning sources for both daytrip and overnight visitors.



If one of your top 5 choices is not listed above, please specify here:

DAYTRIP

- Booking.Com (2)
- Bookingbuddy
- Family's Choice
- Friends (5)
- Friends/Family
- Marriot Bonvoy
- Mississippi Magazine
- References From Other People
- Roadside America
- Travelocity
- Travelocity
- Trivago
- Visit Family And Friends
- Word Of Mouth (2)
- Yelp

OVERNIGHT

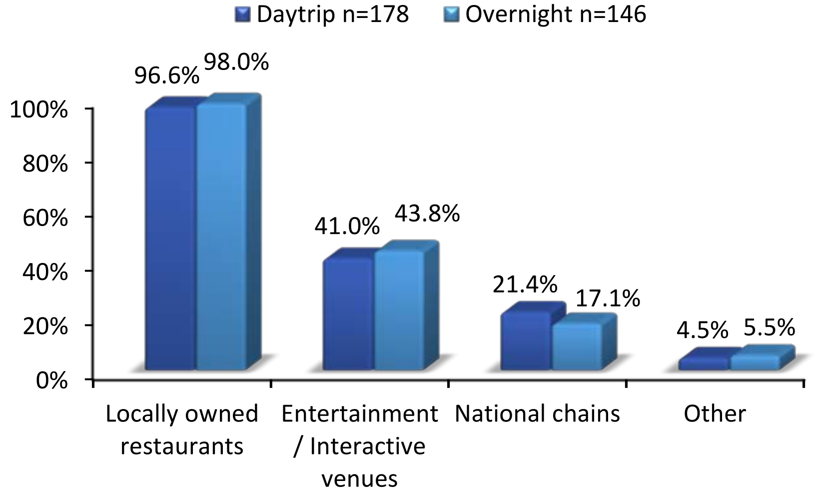
- AMEX Travel
- Family. Church event
- Friends and Family
- Friends who travel
- I like to plan my own vacations.
- Mags like Southern Living and Coastal Living
- Mississippi Public Broadcasting
- My friends
- None of the above visit friends who reside in the area
- Oyster.com
- Referrals by friends
- RV magazines and Good Sam recommendations
- Word of mouth (2)
- Yelp

Dining Preferences

Observations:

- Both daytrip and overnight visitors reported the highest interested in locally owned restaurants as their choice in dining experiences when traveling to a new community. Seafood and American were reported as the top 2 desirable cuisines while vacationing by both daytrip and overnight respondents.

What type of dining experiences are you interested in when vacationing to a new community?



Other:

Daytrip

- 5k events
- Water
- N/A
- Favorite foods: seafood, steak, etc.
- All
- Fine dining
- Leatha's barbeque
- Wherever the locals go

Overnight

- I default to chains (usually limited to Starbucks and Chik Fil A) only when I am not aware of a superior local alternative.
- I just like GOOD food.
- Non processed
- Outdoor recreation
- Price
- Recommendation of friends
- Region-specific dining choices not offered in my own area such as Ward's and Krystal
- Steak Houses

Choose the top 5 types of food/cuisine you prefer to eat while vacationing?

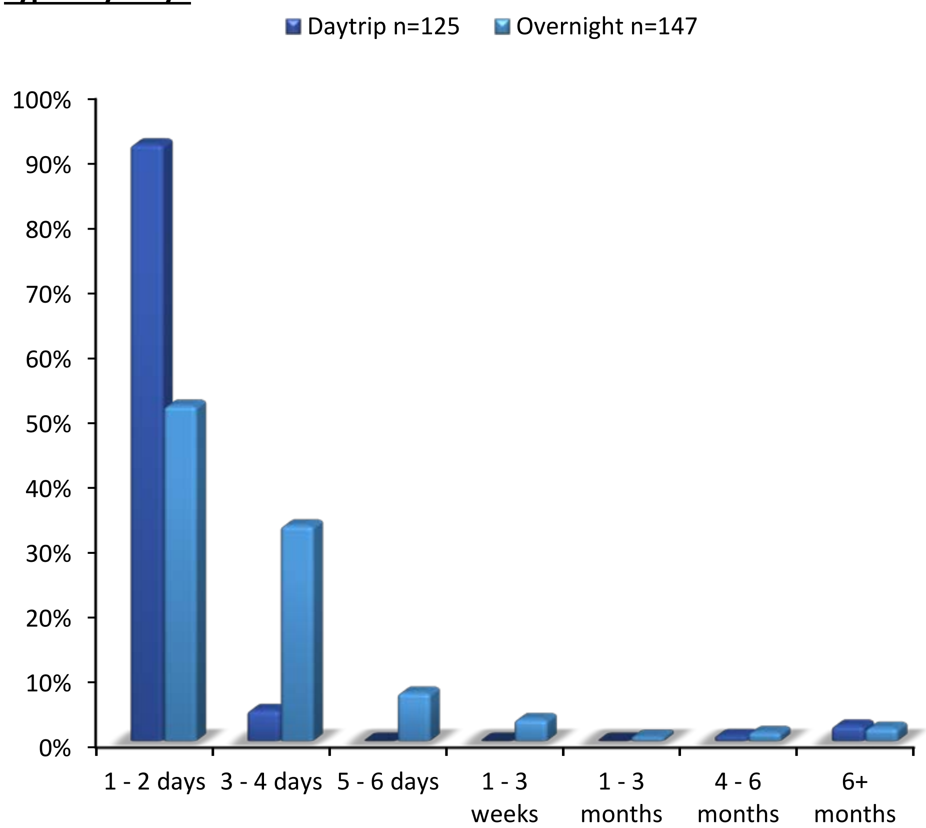
	Daytrip n=216	Overnight n=164
Seafood	68.1%	58.5%
American	66.2%	58.5%
Mexican	52.8%	47.0%
Cajun	47.2%	49.4%
Italian	44.4%	41.5%
NO PREFERENCE - JUST LOOK FOR LOCAL CUISINE	35.7%	40.9%
Soul food	27.8%	27.4%
Japanese	24.1%	17.1%
Chinese	23.6%	21.3%
Mediterranean	16.7%	22.6%
Thai	11.6%	17.7%
Greek	11.1%	14.6%
French	10.2%	7.9%
Caribbean	8.3%	11.6%
Indian	5.1%	9.2%
German	5.1%	3.7%
Other (please specify)	4.6%	3.1%
Spanish	4.2%	4.3%
African	3.7%	3.1%
Vietnamese	2.3%	4.3%
Korean	2.3%	3.7%
Peruvian	0.5%	3.1%
Turkish	0.0%	1.8%

Visitation Characteristics

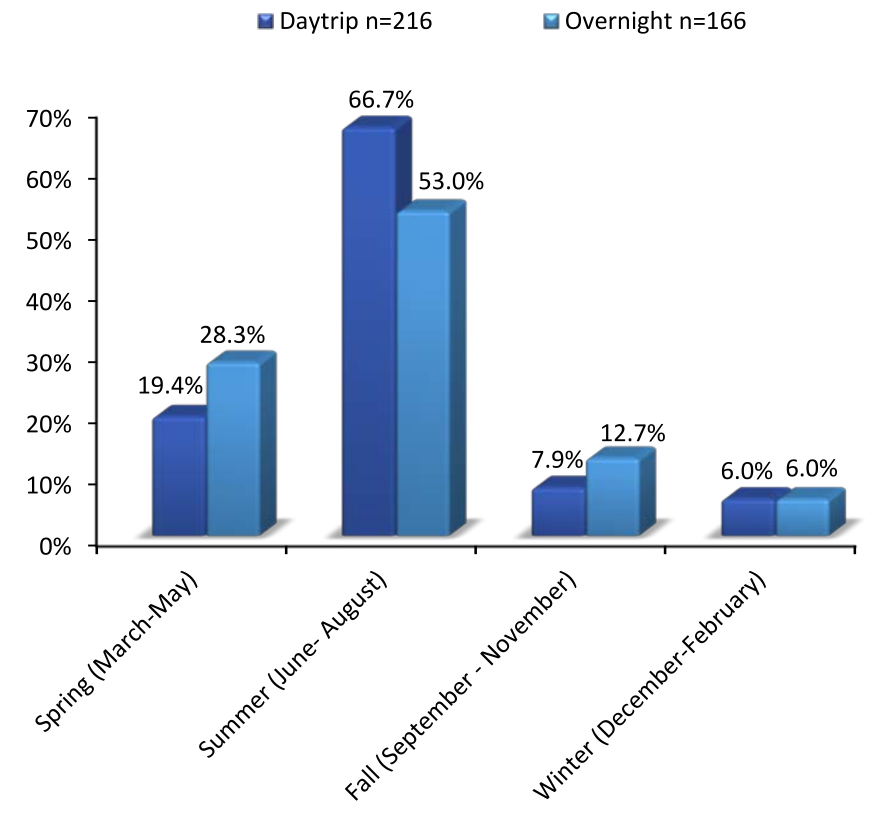
Observations:

- Daytrip and overnight visitors reported that when overnighting in Hattiesburg, they usually stay between 1-2 days. Two thirds 67% of daytrip respondents as well as 53% of overnight respondents indicated their most recent visit was in the summer season. Winter was the least popular season to visit in both segments.
- The majority of both daytrip (95.8%) and overnight (90.4%) visitors to Hattiesburg report being repeat visitors. Although repeat visitation is good, it is also advantageous to have more first-time visitors since they tend to stay longer and spend more. Increasing outreach and advertising is required to drive increased first-time visitation.

If you overnight in the Hattiesburg, MS area, how long do you typically stay?



In which season was your MOST RECENT visit to the Hattiesburg area?

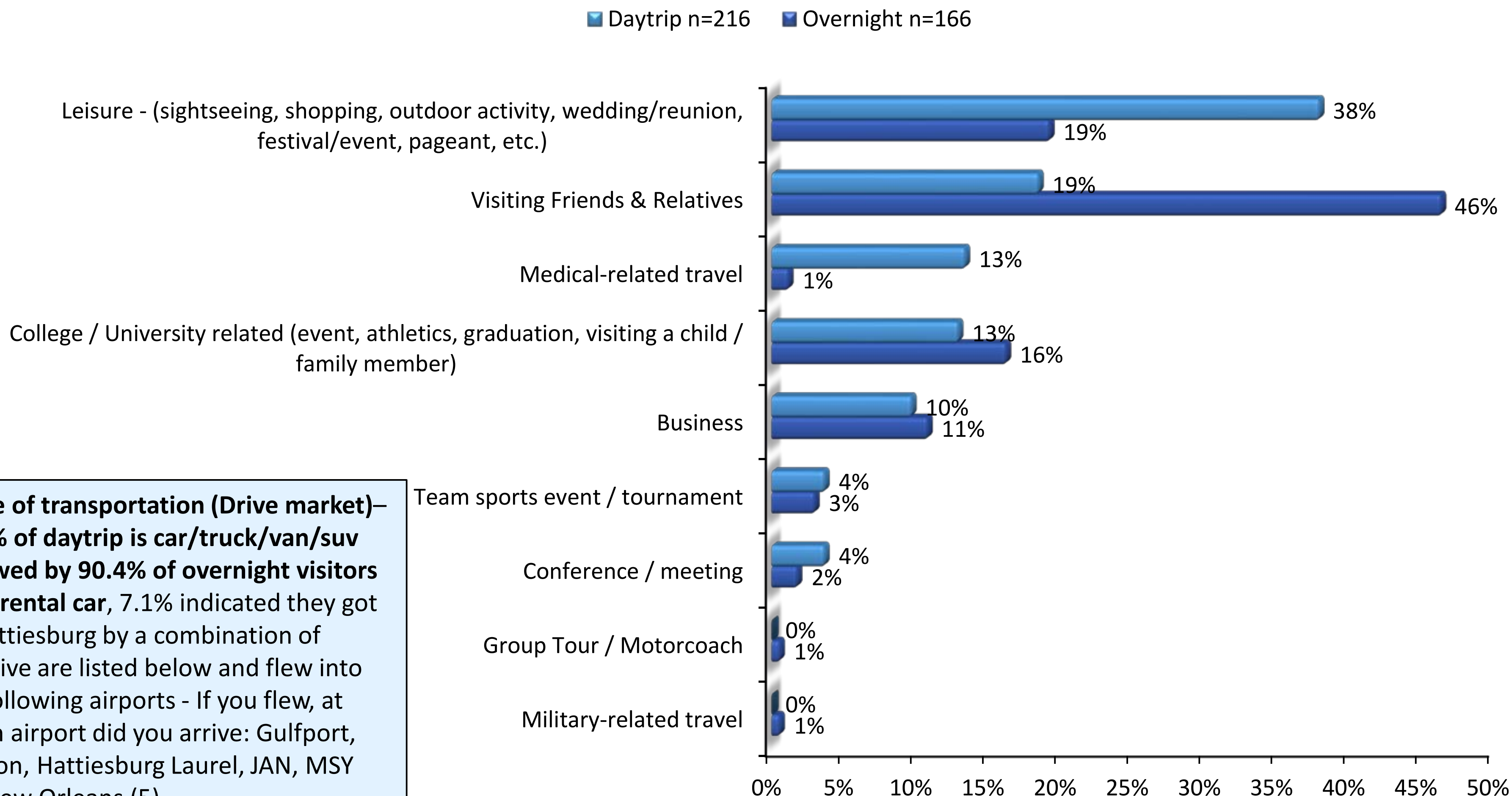


Primary Travel Purpose

What was the MAIN purpose for your most recent trip to the Hattiesburg, MS area?

Observations:

- Daytrip visitors reported traveling for leisure reasons such as sightseeing, shopping, outdoor activities, festivals/events, pageants etc. as their primary reason for traveling to Hattiesburg whereas overnight visitors reported visiting friends and relatives as their primary trip purpose.



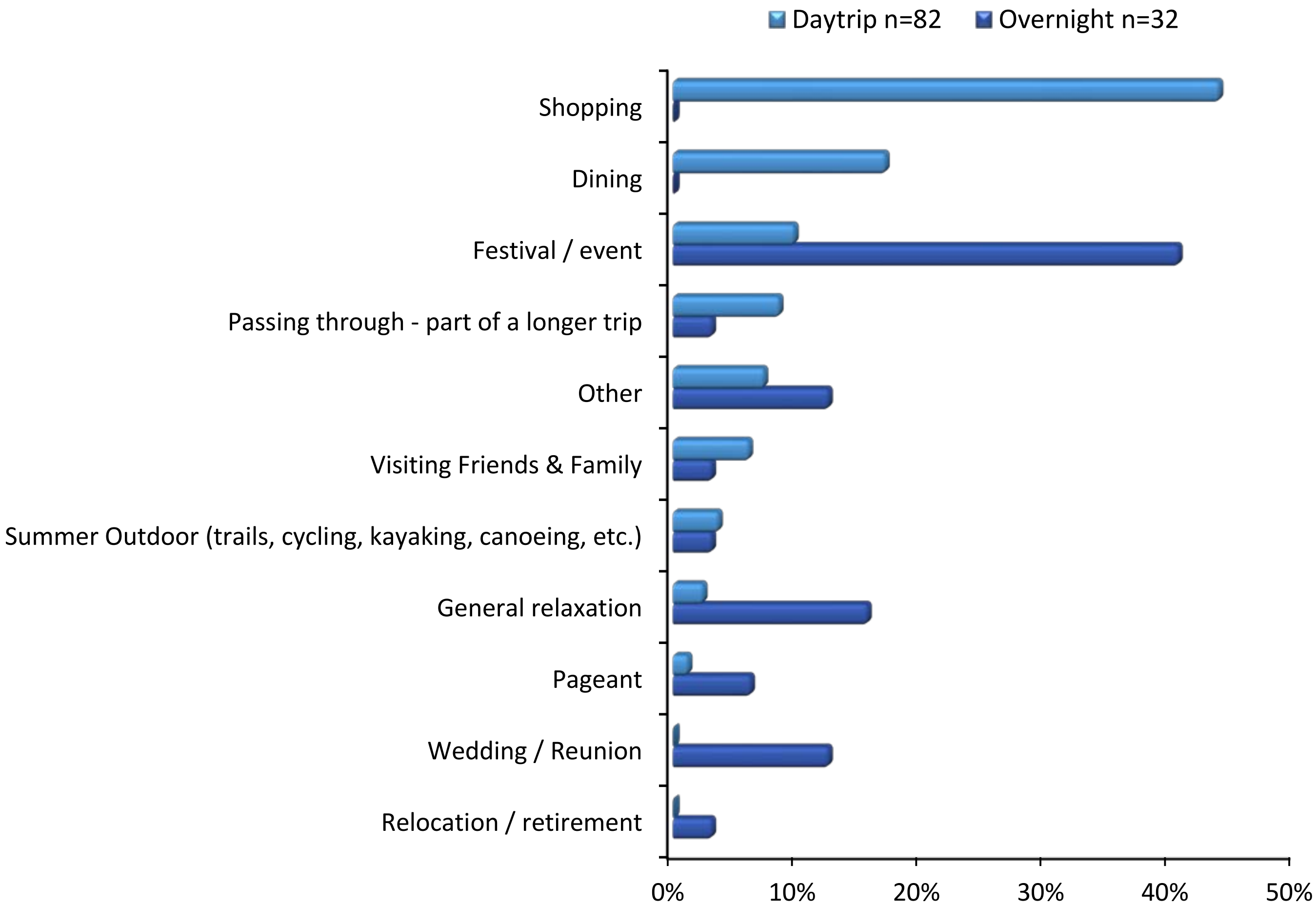
Mode of transportation (Drive market)– 99.5% of daytrip is car/truck/van/suv followed by 90.4% of overnight visitors 9.6% rental car, 7.1% indicated they got to Hattiesburg by a combination of fly/drive are listed below and flew into the following airports - If you flew, at which airport did you arrive: Gulfport, Jackson, Hattiesburg Laurel, JAN, MSY (4), New Orleans (5).

Leisure Travel Purpose

How would you best categorize the PRIMARY purpose for your most recent LEISURE trip to the Hattiesburg, MS area?

Observations:

- Daytrip visitors to Hattiesburg reported shopping, dining, and festival/event as their primary leisure trip purpose. As expected, overnight respondents reported festivals/events, general relation, and wedding/reunion as their primary leisure purpose.



Leisure Daytrip Top 3

1. Shopping
2. Dining
3. Festival / Event

Leisure Overnight Top 3

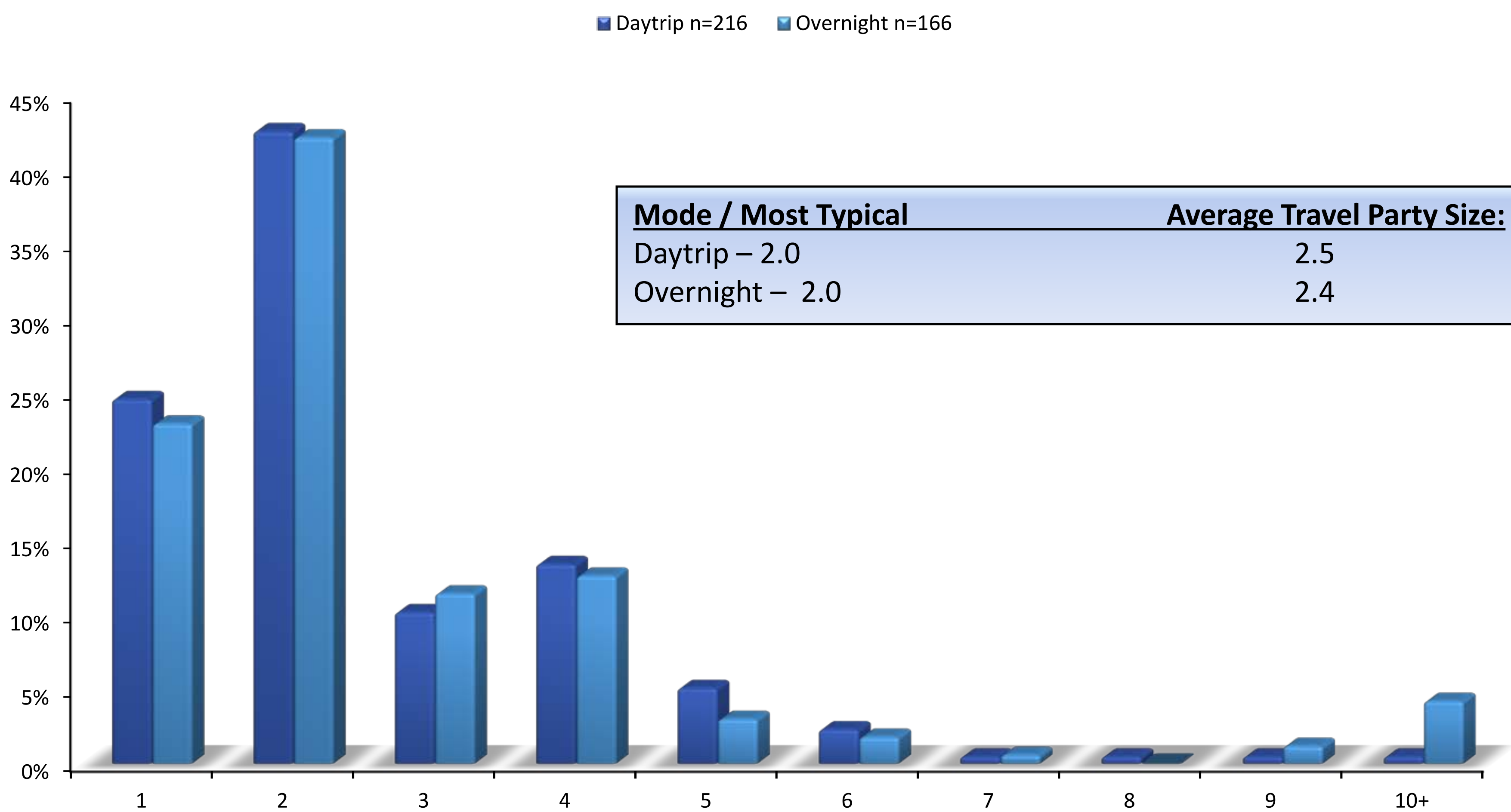
1. Festival / Event
2. General Relaxation
3. Wedding / Reunion

Travel Party Size

What was the total number of people in your immediate travel party who were included in your travel expenses?

Observations:

- **The typical travel party size for both visitor segments was 2.0.** Average travel party size varied depending on the type of visitor. Daytrip visitors = 2.5 and overnighters = 2.4.



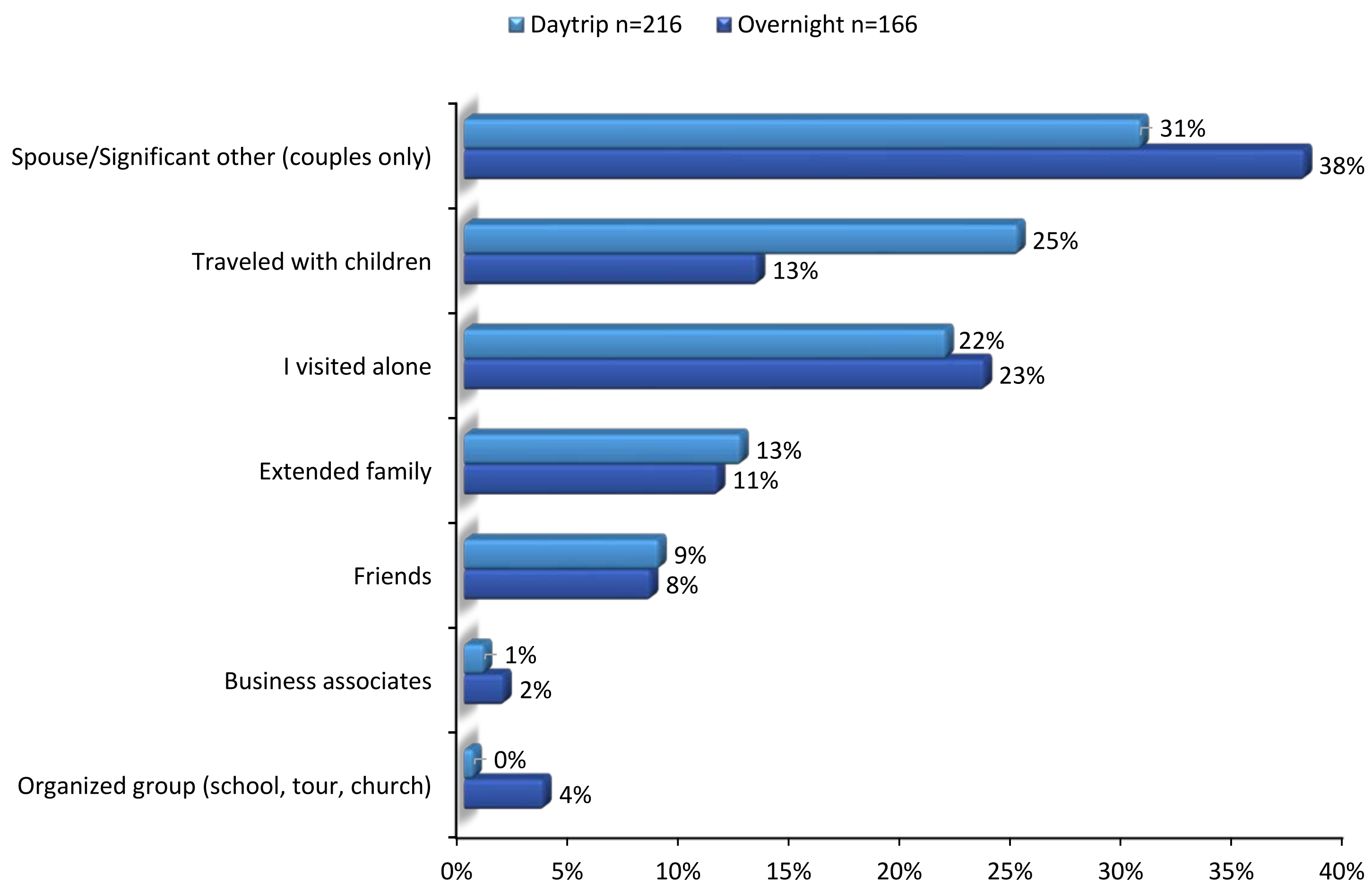
Mode / Most Typical	Average Travel Party Size:
Daytrip – 2.0	2.5
Overnight – 2.0	2.4

Travel Party Makeup

<u>Which of the following best describes the people who came with you on this visit to the Hattiesburg, MS area?</u>

Observations:

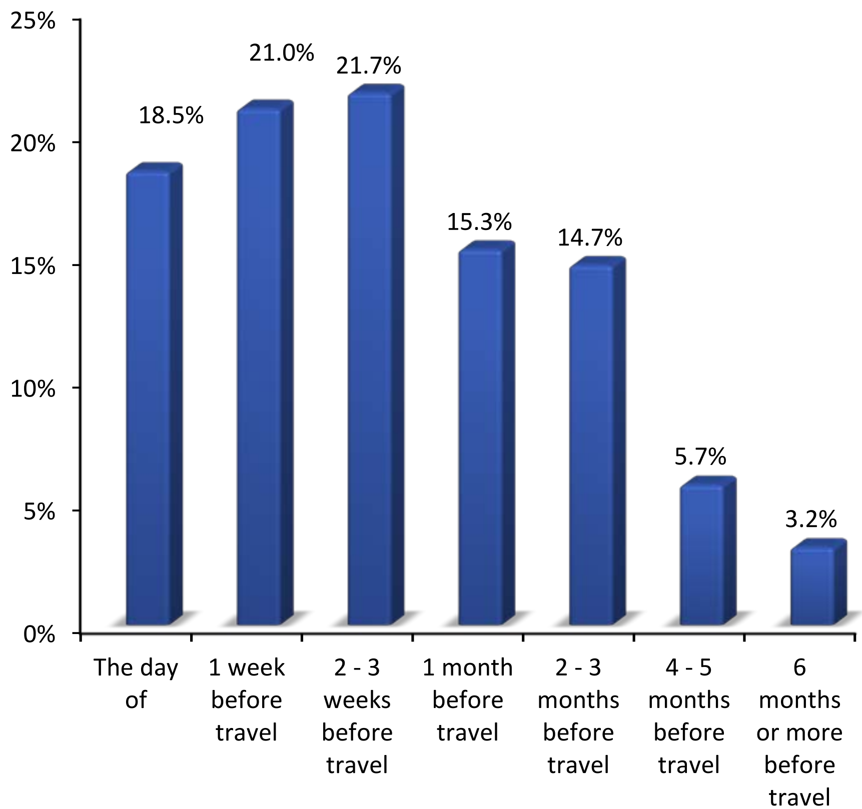
- Both daytrip and overnight segments reported visiting most often as a couple without children.



Overnight - Travel Planning Characteristics

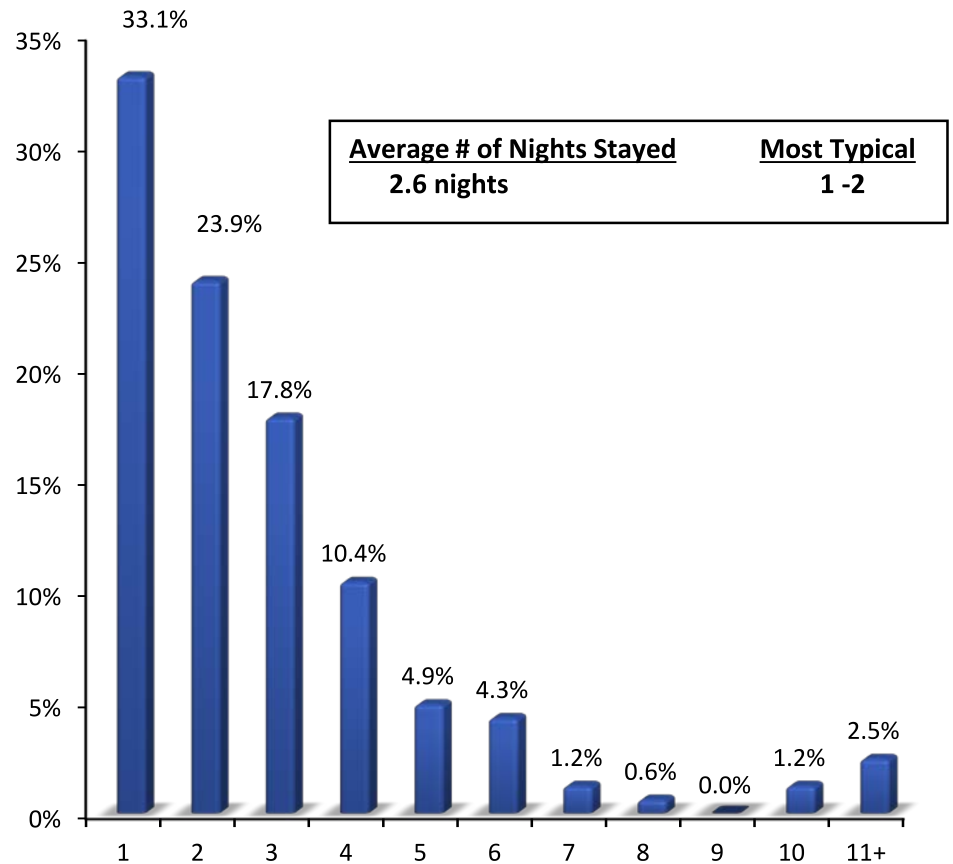
How far in advance did you book your accommodations for your most recent visit to the Hattiesburg, MS area? n=157

Observations:
- The vast majority (61.2%) of overnight travelers to Hattiesburg are booking their trip within 2-3 weeks of travel. This indicates a need for a quick turnaround when potential visitors request information about the Hattiesburg area.



How many nights did you stay in the Hattiesburg, MS area on your most recent visit? n=163

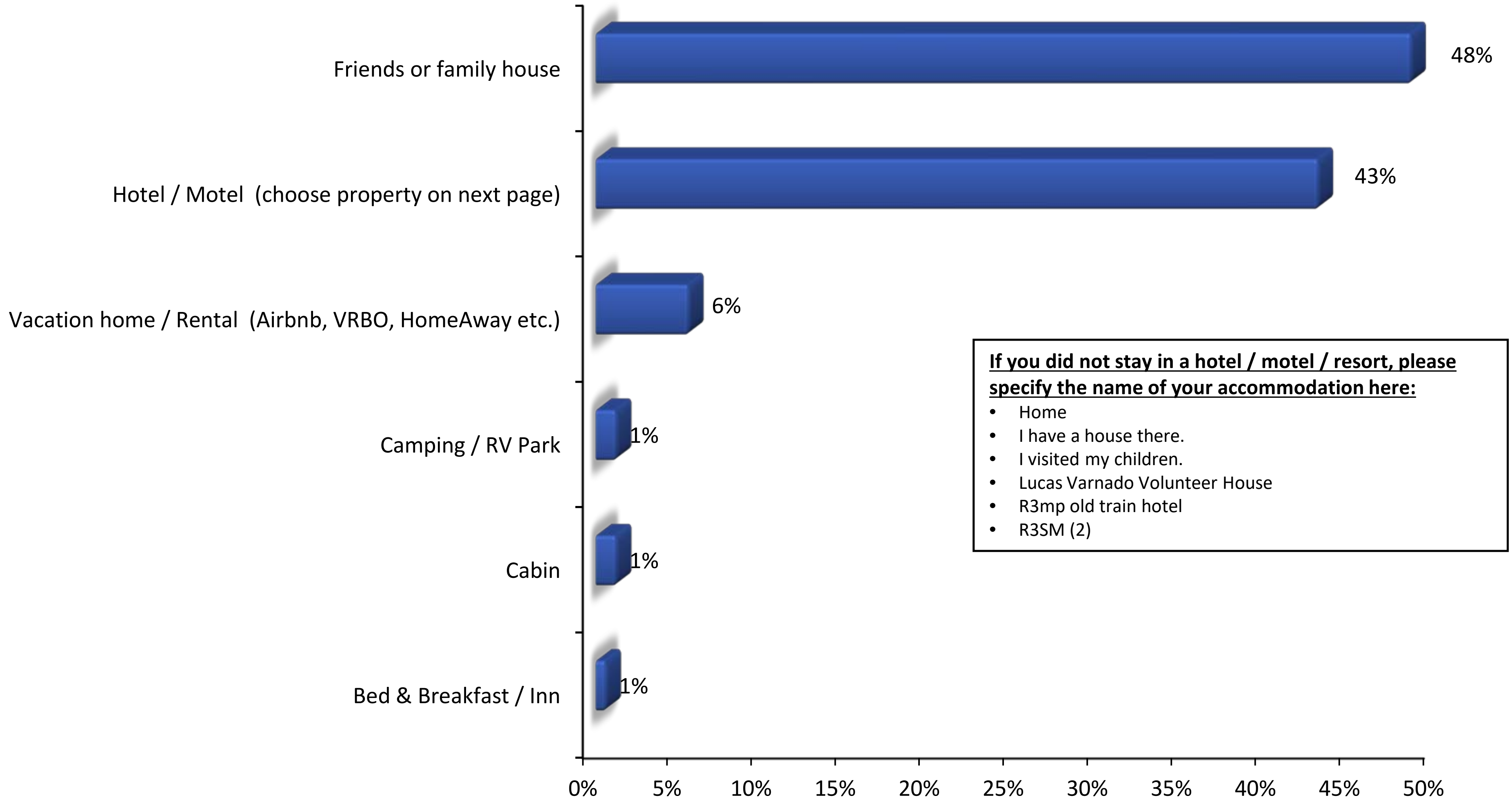
Observations:
- Over half (57%) of travelers to Hattiesburg reported staying 1 or 2 nights. This indicates a need for more activities to encourage a longer length of stay in Hattiesburg.



Accommodations

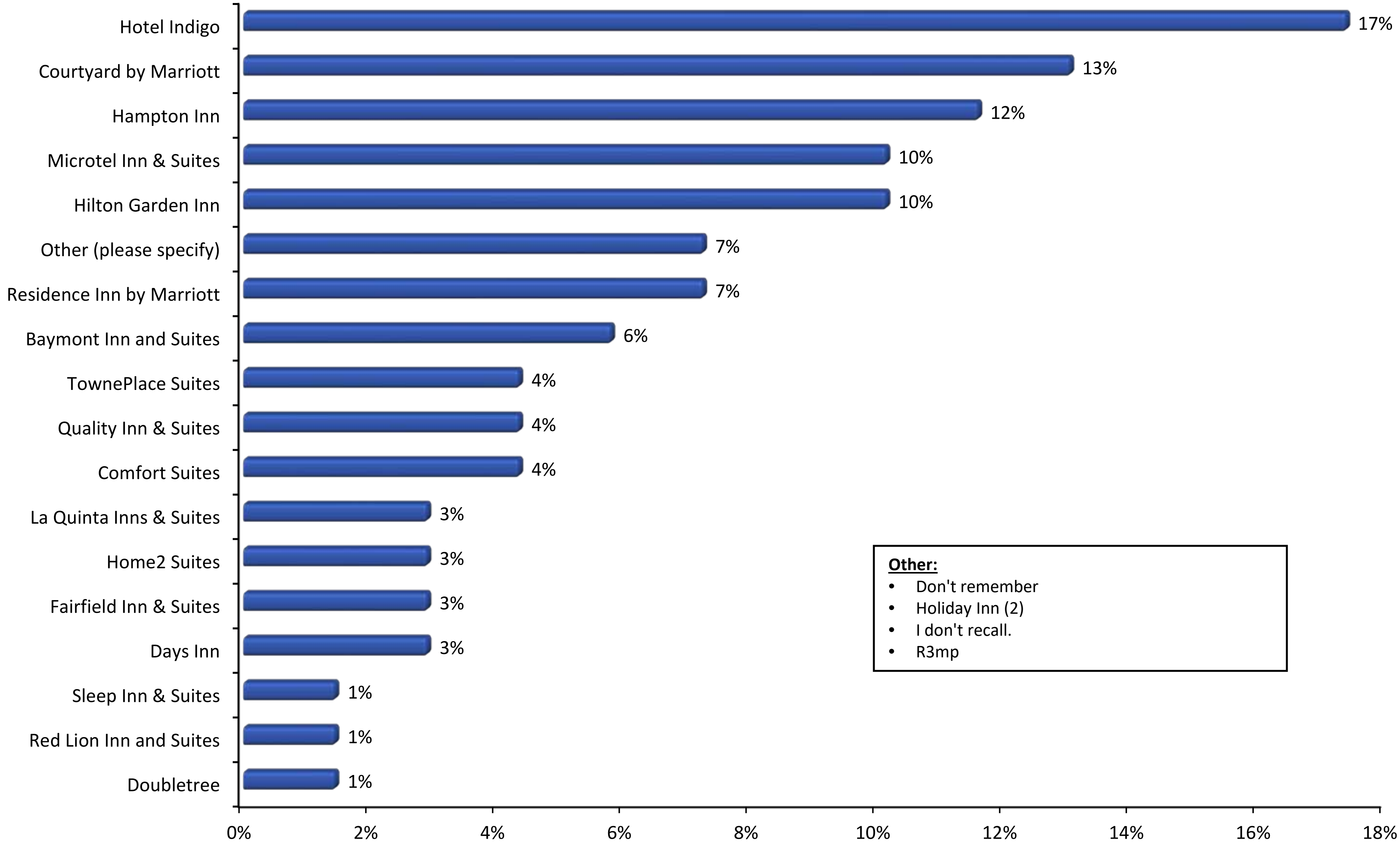
Where did you stay during your most recent visit to the Hattiesburg, MS area? n=163

Observations:
- The majority of overnight visitors reported staying with friends or family while visiting Hattiesburg followed closely by staying in a hotel/motel.



Accommodations

Please tell us the hotel/motel you chose for your most recent overnight stay in the Hattiesburg, MS area. n=69



Other:
- Don't remember
- Holiday Inn (2)
- I don't recall.
- R3mp

Daytrip Visitor Activities

Check all activities you or a member of your travel party participated in WHILE VISITING the Hattiesburg, MS area. n=206

Top 5 Activities by DAYTRIP Visitors

1. **Dining - unique, local (non-chain) - 57.8%**
2. **Shopping - 55.3%**
3. **Visit other friends & relatives - 23.3%**
4. **Antique shopping - 15.5%**
5. **Festival/event - 15.1%**

Other activities participated in by daytrip visitors:

Activities	%	Activities	%
Concert/live performance	14.6%	Wedding/reunion	2.9%
Driving/sightseeing	14.6%	Sleep late/take a nap	2.4%
Sports event/race/tournament	13.6%	Cycling	1.9%
Children's activities	11.7%	Birding	1.5%
Business/meeting/conference /training	11.2%	Camping	1.5%
Other	9.7%	Hiking	1.5%
Theater/Performing Arts	9.2%	Fishing	1.0%
DID NOTHING	6.3%	Hunting	1.0%
Craft Breweries	5.8%	Water recreation (kayaking, canoeing, etc.)	1.0%
Spa/Wellness	4.4%	Golfing	0.5%
Museum/Gallery/Art	2.9%		

Overnight Visitor Activities

Check all activities you or a member of your travel party participated in WHILE VISITING the Hattiesburg, MS area. n=157

Top 5 Activities by OVERNIGHT Visitors

1. **Dining - unique, local (non-chain) - 76.4%**
2. **Shopping - 49.7%**
3. **Visit other friends & relatives - 48.4%**
4. **Sleep late/take a nap - 26.8%**
5. **Festival/event - 24.8%**

Other activities participated in by overnight visitors:

Activities	%	Activities	%
Driving/sightseeing	22.9%	Hiking	7.6%
Concert/live performance	21.7%	Wedding/reunion	5.7%
Craft Breweries	21.7%	Spa/Wellness	5.1%
Sports event/race/tournament	19.1%	Water recreation (kayaking, canoeing, etc.)	5.1%
Antique shopping	17.8%	DID NOTHING	4.5%
Other	15.3%	Camping	3.2%
Children's activities	12.1%	Fishing	3.2%
Theater/Performing Arts	12.1%	Birding	2.6%
Museum/Gallery/Art	9.6%	Golfing	2.6%
Business/meeting/conference/training	8.9%	Hunting	0.0%
Cycling	7.6%		

Attractions Visited

Please check ALL attractions that you visited while in the Hattiesburg area. (TOP FIVE IN BOLD).

	Daytrip n=195	Overnight n=152
Hattiesburg Zoo	**47.2%**	**44.7%**
University of Southern Mississippi	**44.6%**	**58.6%**
Hattiesburg Saenger Theater	**30.8%**	**25.0%**
Lucky Rabbit Flea Market	**27.7%**	**23.0%**
Longleaf Trace	**24.6%**	**24.3%**
Paul B Johnson State Park	21.0%	18.4%
DID NOT VISIT ANY ATTRACTIONS	19.0%	13.8%
William Carey University	15.9%	14.5%
Okatoma Creek	13.9%	11.2%
Updown Trampoline Park	12.3%	7.9%
Black Creek	11.3%	11.2%
All American Rose Garden	8.7%	10.5%
Desoto National Forest	8.7%	9.9%
Historic Downtown Walking Tour	8.2%	4.6%
Lake Thoreau Environmental Center	8.2%	1.3%
Mississippi Armed Forces Museum	8.2%	6.6%
Southern Prohibition Brewing	6.2%	19.7%
African American Military History Museum	5.1%	9.2%
USM Art Museum	5.1%	4.6%
Hattiesburg Arts Council Gallery	3.1%	4.0%
Hattiesburg Country Club Golf	2.1%	5.9%
Freedom Summer Trail	1.5%	2.0%
Shadowridge Golf	1.5%	2.0%
Timberton Golf	1.5%	3.3%
Escape Room Games	1.5%	2.0%
WCU - Sarah Gillespie Museum of Art	0.0%	2.6%

EVENTS

Please check ALL events that you or anyone in your party attended while in the Hattiesburg area. (TOP FIVE IN BOLD).

	Daytrip n=193	Overnight n=148
DID NOT ATTEND AN EVENT	**50.3%**	**50.0%**
Hubfest	25.4%	18.2%
Festival South 2018	13.0%	12.8%
Rise N Shine Half Marathon	12.4%	12.8%
Live @5 / SummerTunes	11.4%	13.5%
Downtown Crawfish Jam	7.8%	6.1%
Hattiesburg Craft Beer Festival	6.7%	8.8%
Old Time Christmas / Victorian Candlelight Tour	6.2%	2.0%
Downtown BBQ Showdown	5.2%	4.7%
Star Spangled Celebration on the River	3.6%	2.7%
Hattiesburg Restaurant Week	3.1%	3.4%
MHSAA State Championship Football Games	2.6%	2.7%
Hattie 100 Bike Ride	2.1%	0.7%
Miss Hospitality Competition	1.0%	5.4%
New Year’s Eve Ball Drop	1.0%	2.0%

Following is a list of amenities offered in Hattiesburg. Considering this visit, please rate each amenity using the satisfaction scale provided where 5 is excellent, 3 is fair, and 1 is very poor.

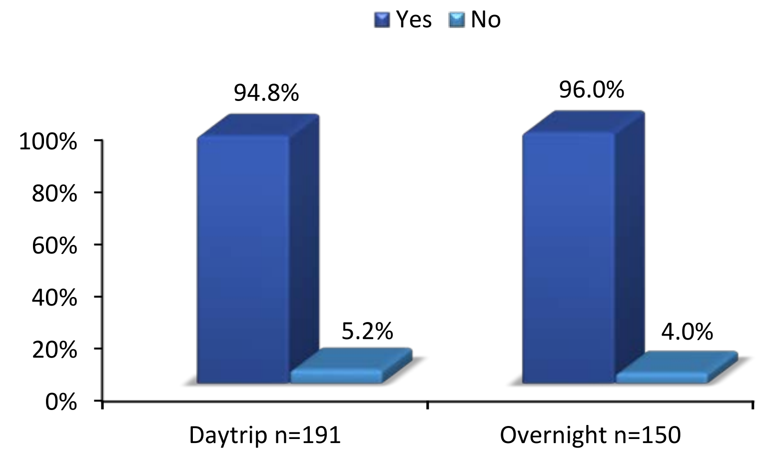
Observations:

- The amenities with the highest satisfaction ratings for overnight and daytrip visitors were unique local dining, quality of healthcare facilities, and lodging value received for price paid. It is important, to note, all amenities rated highly which is an affirmation of the overall appeal of the destination with your current visitors. Kudos to VisitHATTIESBURG and all their travel partners who work hard to make a positive impact on the travel experience in Hattiesburg. It is paying off. Evening/nightlife received a score below 4.00 by both daytrip and overnight visitors. Overnight visitors also scored appeal of shopping & merchandise, variety of children's activities, signage and wayfinding, and ease of fining visitor information below a 4.00. Typically categories that reported below 4.0 provide an opportunity for the community leaders to work together to determine areas where improvements can be implemented.
- **OVERALL TRIP SATISFACTION: Daytrip visitors rated their experience to the Hattiesburg area as a 4.49 on a 5-point scale. Overnight visitors rated Hattiesburg a bit higher at a 4.51**

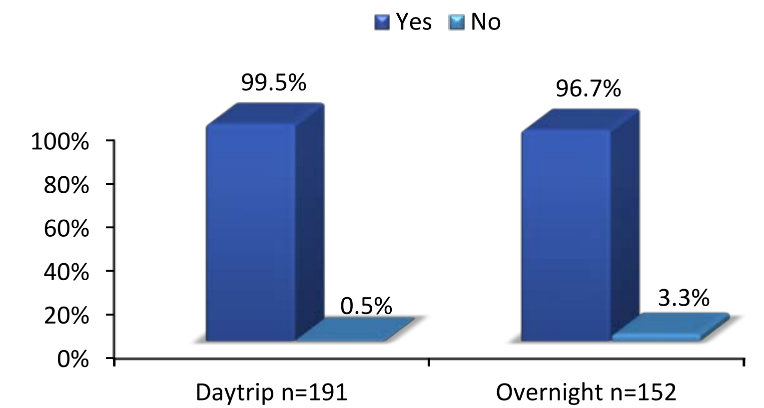
	Daytrip n=195	Overnight n=153
Unique local dining	4.35	4.32
Quality of healthcare facilities	4.35	4.29
Lodging value you received for the price paid	4.32	4.43
Appeal of shopping & merchandise	4.11	3.96
Level of service / employee training	4.09	4.01
Variety of children's activities	4.08	3.98
Signage and wayfinding	4.06	3.98
Variety of outdoor experiences	4.03	4.08
Ease of finding visitor information	4.03	3.96
Evening / nightlife activities	3.87	3.92

Observations:
Overnight and daytrip visitors both indicate a desire to return and recommend the area to others which confirms the high level of satisfaction reported earlier.

Would you recommend the Hattiesburg, MS area to others?



Would you consider a future visit to Hattiesburg?



Appealing Activities/Experience

Please tell us if any of the following activities/experiences would appeal if offered in the Hattiesburg, MS area. Please use a 4-point scale where 4 is extremely appealing, 3 is very, 2 is somewhat and 1 is not appealing at all.

Daytrip n=191	Extremely	Very	Somewhat	Not at all	Weighted Average
Expanded zoo exhibits with new animals	**48.1%**	**22.7%**	22.7%	6.5%	**3.12**
Food Truck Park / Festivals	**34.8%**	**38.6%**	20.7%	6.0%	**3.02**
Rooftop dining / bar	**36.9%**	**29.4%**	19.3%	14.4%	**2.89**
Children's Museum	**26.1%**	**27.8%**	27.8%	18.3%	**2.62**
Unique downtown boutique shopping	24.7%	22.0%	36.6%	16.7%	**2.55**
Expanded walking / hiking / biking trails	22.4%	28.4%	28.4%	20.8%	**2.52**
Public Art Mural Series	19.5%	23.8%	34.1%	22.7%	**2.4**
Unique downtown lodging	19.7%	18.6%	33.9%	27.9%	**2.3**
Public bike share program	7.7%	14.8%	28.4%	49.2%	**1.81**
Outdoor ATV Park	10.6%	11.7%	20.0%	57.8%	**1.75**

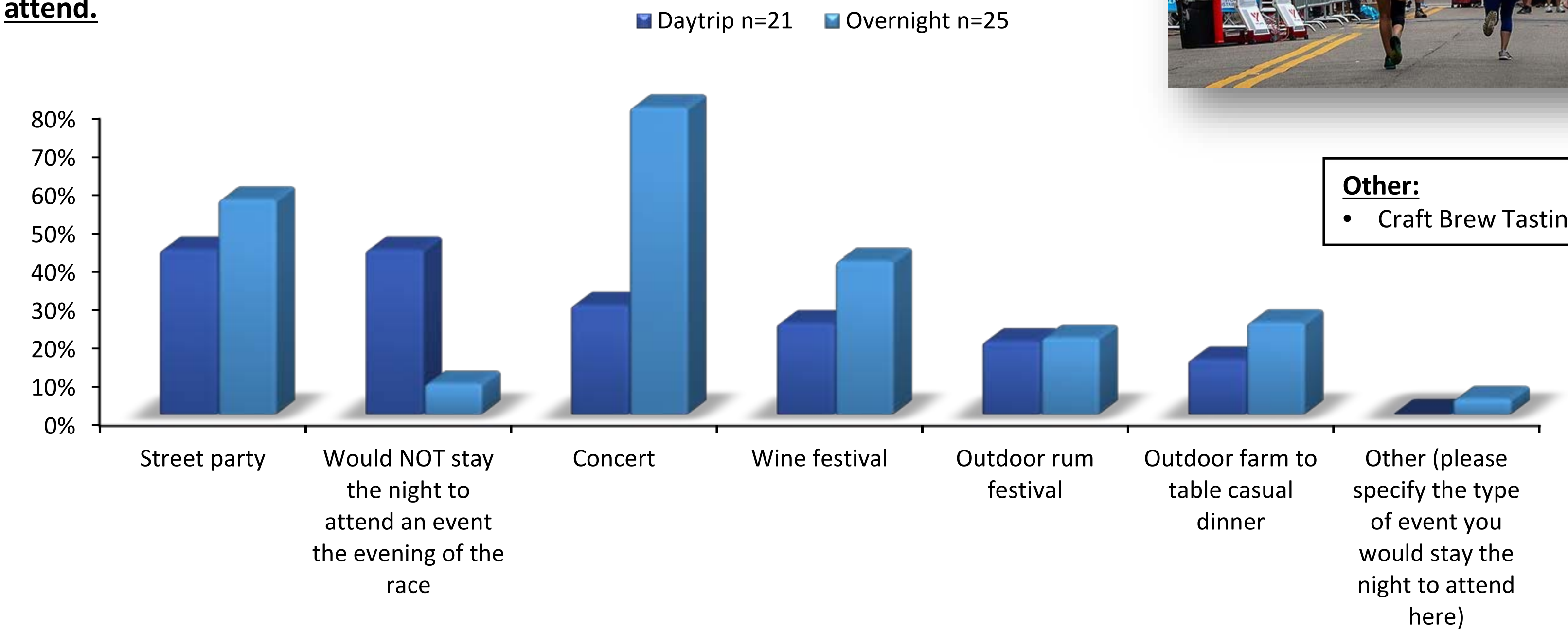
Overnight n=147	Extremely	Very	Somewhat	Not at all	Weighted Average
Rooftop dining / bar	**44.4%**	**29.9%**	14.6%	11.1%	3.08
Food Truck Park / Festivals	**38.5%**	**34.3%**	18.9%	8.4%	3.03
Expanded walking / hiking / biking trails	**35.7%**	**33.6%**	18.6%	12.1%	2.93
Expanded zoo exhibits with new animals	**38.6%**	**21.4%**	25.0%	15.0%	2.84
Unique downtown boutique shopping	**30.3%**	**30.3%**	27.6%	11.7%	2.79
Unique downtown lodging	**27.7%**	**29.1%**	24.8%	18.4%	2.66
Public Art Mural Series	17.6%	28.9%	36.6%	16.9%	2.47
Children's Museum	25.7%	17.1%	21.4%	35.7%	2.33
Public bike share program	10.1%	18.8%	36.2%	34.8%	2.04
Outdoor ATV Park	7.3%	8.8%	17.5%	66.4%	1.57

Rise N Shine Half Marathon

If you stayed the night in Hattiesburg, MS for the Rise N Shine Half Marathon, please tell us which night(s) you stayed.

Daytrip n=191	Daytrip n=16	Overnight n=23
Did not spend the night	87.5%	30.4%
Friday night only	6.3%	56.5%
I stayed longer than just Friday and Saturday nights	6.3%	8.7%
Saturday night only	0.0%	0.0%
Other (please specify)	0.0%	4.4%

Consideration is being given to planning an event the evening of the race. Please tell us from the options below which type of event you would stay the night in Hattiesburg to attend.



Other:

- Craft Brew Tasting

Travel PARTY Spending (Total Trip)

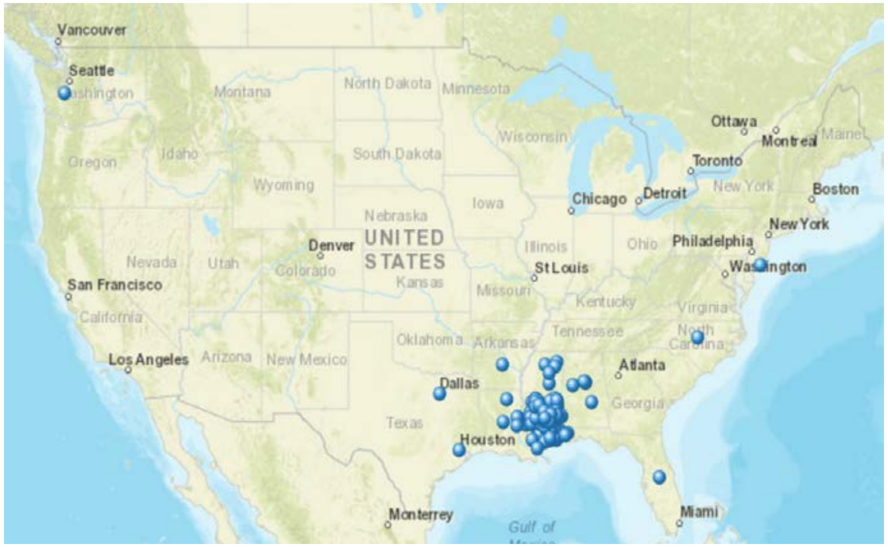
Observations:
- Overall spending per travel party: Daytrip = $191.72; Overnight = $498.42
- Hattiesburg makes more than twice as much money per party on overnight visitors compared to daytrip visitors. Therefore, the prime focus of marketing efforts for VisitHATTIESBURG should be their overnight segment.

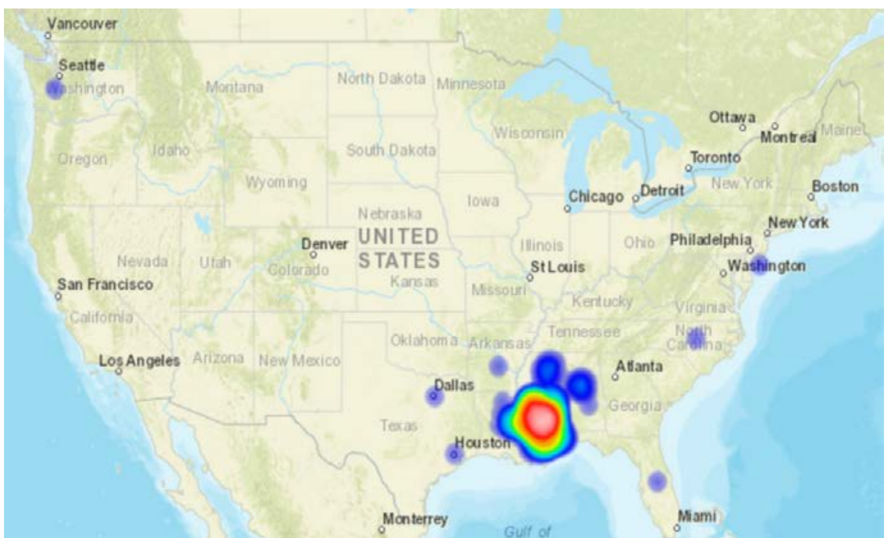
Spending Category	Daytrip n=216	Overnight n=166
Typical total # in Travel Party (mode)	***2.5***	***2.4***
Average Length of Stay	***0 nights***	***2.6 nights***
Lodging (% of reporting)	**$0.00** (0.0%)	**$258.93** (36.7%)
Dining / Food (% of reporting)	**$61.25** (78.7%)	**$173.46** (83.1%)
Shopping (% of reporting)	**$152.94** (55.6%)	**$169.27** (53.6%)
Attractions and Events (% of reporting)	**$63.16** (29.2%)	**$92.60** (47.0%)
Local Transportation (% of reporting)	**$37.25** (31.5%)	**$76.75** (45.2%)
Average Total Spending Per Travel Party (% of reporting)	**$191.72*** **(85.2%)**	**$498.42*** **(84.9%)**

***Note: The spending categories will not add up** to the average spending reported in the table on this page. The categories in the table are averaged individually. Whereas the overall total is a weighted average that takes into account the fact many travel parties did not report spending in all of the categories.

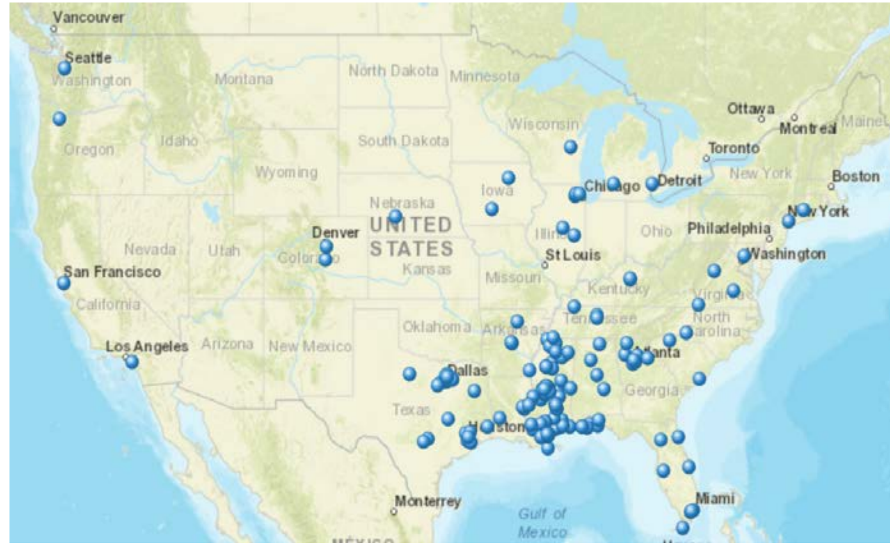
Point of Origin

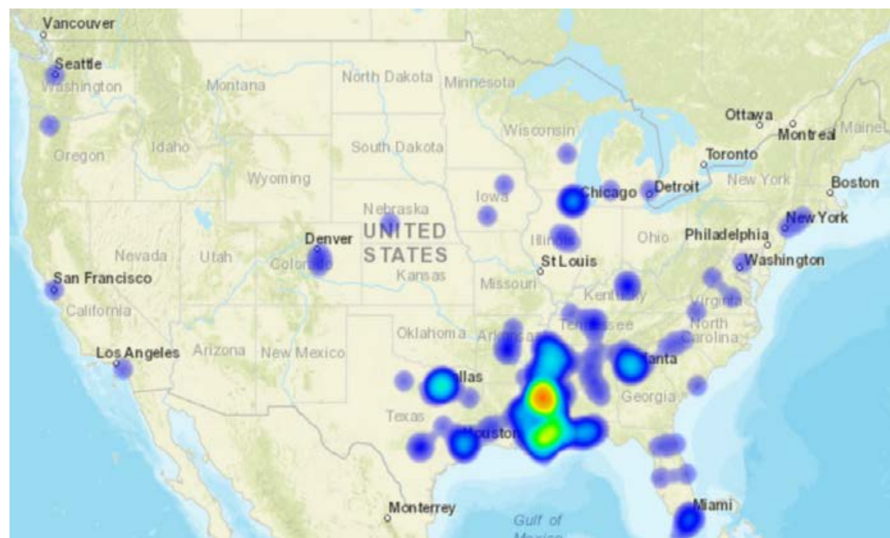
Visitors Point of Origin – DAYTRIP





Visitors Point of Origin – OVERNIGHT





Medical Related – Hattiesburg Hospitals – Southeastern/Gulf Coast Region Residents

Observations:

- Daytrip visitors rated both Forrest General Hospital and Wesley Medical Center at a 4.37 on a 5-pt scale while overnight visitors rated Wesley General at a 4.33 and Forrest General at a 3.6. Both daytrip and overnight respondents reported an appointment/consult with a physician as their top circumstance for a medical-related visit to the Hattiesburg area followed by accompanying a friend/relative.

With which of these Mississippi hospitals are you familiar?

	Daytrip n=109	Overnight n=20
Forrest General Hospital - Hattiesburg	98.2%	80.0%
Wesley Medical Center - Hattiesburg	81.7%	60.0%
University of Mississippi Medical Center - Jackson	67.9%	50.0%
St. Dominic Hospital - Jackson	45.9%	30.0%
Memorial Hospital - Gulfport	26.6%	40.0%
Other	22.0%	30.0%
Anderson Regional Medical Center- Meridian	21.1%	15.0%

With which of these Mississippi hospitals do you most often choose for your healthcare needs?

	Daytrip n=106	Overnight n=20
Forrest General Hospital - Hattiesburg	61.3%	35.0%
Wesley Medical Center - Hattiesburg	24.5%	30.0%
Other	21.7%	25.0%
University of Mississippi Medical Center - Jackson	8.5%	10.0%
Memorial Hospital - Gulfport	7.6%	20.0%
St. Dominic Hospital - Jackson	3.8%	5.0%
Anderson Regional Medical Center- Meridian	2.8%	5.0%

Please choose from the list below all of the circumstances in which you have made a medical-related visit to the Hattiesburg area.

	Daytrip n=108	Overnight n=20
Appointment/consult with physician	74.1%	60.0%
Accompanied a friend / relative	53.7%	45.0%
Diagnostic procedure or lab test	46.3%	45.0%
Emergency visit	38.0%	35.0%
Visiting a convalescing friend / relative	32.4%	35.0%
Surgery-outpatient	30.6%	25.0%
Surgery-impatient	21.3%	25.0%
I have NOT had a medical-related visit to Hattiesburg	13.0%	25.0%
Therapy / treatment	12.0%	15.0%
Medical related business / not healthcare	8.3%	5.0%
Other	3.7%	5.0%

Medical Related – Hattiesburg Hospitals – Visitor Respondents

Regarding your medical trip to Hattiesburg, what was the SPECIFIC reason for your trip?

	Daytrip n=29	Overnight n=2
Appointment/consult with physician	65.5%	100.0%
Emergency visit	6.9%	0.0%
Therapy / treatment	6.9%	0.0%
Accompanied a friend / relative	6.9%	0.0%
Other	6.9%	0.0%
Surgery-outpatient	3.5%	0.0%
Visiting a convalescing friend / relative	3.5%	0.0%
Diagnostic procedure or lab test	0.0%	0.0%
Surgery-impatient	0.0%	0.0%
Medical related business / not healthcare	0.0%	0.0%

With which of these hospitals are you familiar?

	Daytrip n=29	Overnight n=2
Forrest General Hospital - Hattiesburg	**89.7%**	**100.0%**
Wesley Medical Center - Hattiesburg	**82.8%**	**100.0%**
Memorial Hospital - Gulfport	6.9%	50.0%
St. Dominic Hospital - Jackson	20.7%	50.0%
University of Mississippi Medical Center - Jackson	44.8%	50.0%
Anderson Regional Medical Center- Meridian	13.8%	50.0%
Other	6.9%	0.0%

With which of these Mississippi hospitals do you most often choose for your healthcare needs?

	Daytrip n=29	Overnight n=2
Forrest General Hospital - Hattiesburg	**89.7%**	**100.0%**
Wesley Medical Center - Hattiesburg	**82.8%**	**100.0%**
Memorial Hospital - Gulfport	6.9%	50.0%
St. Dominic Hospital - Jackson	20.7%	50.0%
University of Mississippi Medical Center - Jackson	44.8%	50.0%
Anderson Regional Medical Center- Meridian	13.8%	50.0%
Other	6.9%	0.0%

Observations:

- The majority of daytrip and overnight visitors to Hattiesburg for medical related reasons were due to an appointment / consult with a physician. Respondents reported Forrest General and Wesley Medical Center as being both the most familiar. and first choice for healthcare needs for the region.

Please tell us about your perception of the overall reputation/image of the Hattiesburg hospitals listed below.

Forrest General Hospital –

Daytrip

- Amazing birth center
- Excellent care.
- Excellent care. Excellent doctors and staff when I had serious health needs
- Excellent healthcare system, physicians, services and professional staff
- Good (4)
- Great (2)
- It was good
- Knowledge, caring staff
- Mostly ok. Worried about resistant bacterial infection
- Ok
- Very good (3)
- We had a bad experience there-no pain med order after surgery
- Worst one ever

Overnight

- Good

Wesley Medical Center –

Daytrip

- Good
- Wesley gave excellent care to a close friend.

Overnight

- Clean.
- Excellent
- Friendly staff but long wait times.
- Good (4)
- Great
- Have never been there
- High Quality healthcare system and services
- Its decent
- Not what it once was.
- Ok
- Poor
- Quick Er visits
- Very good

VISIT HATTIESBURG

Bus/Conf/Mtg Survey Respondents

Summary & Observations:

- A total of 40 respondents identified their primary purpose for visiting Hattiesburg as a business trip. A total of 59% were visitors while 41% were from a neighboring county. Trip type: 54% daytrip, 46% overnight.
- Medical / Healthcare business was the top business type that brought daytrip visitors to Hattiesburg while overnight respondents said creative arts.
- 23.8% of daytrip visitors and 42.1% of overnight visitors said that family members accompanied them on their business trip.
- Respondents rated Hattiesburg as a business/military destination as a 4.0 on a 5-point scale for both daytrip and overnight segments.
- Only 17% of respondents were first-time visitors – 83% had been to Hattiesburg before.
- 53% stayed at a hotel/motel, and 29% stayed at a friend/family house.
- Average length of stay was typically two nights.
- Top Activities - dining, shopping, business/meeting/conference/training.
- Top Attractions – University of Southern Mississippi, Hattiesburg Zoo, Longleaf Trace and Lucky Rabbit Flea Market.
- Business/Conference/Meeting respondents rated rooftop dining/bar, food truck park/festivals, and expanded zoo exhibits with new animals as the top activities/experiences that would appeal if offered in Hattiesburg.
- 11 people reported coming to Hattiesburg for a conference/meeting/event. When asked to rate Hattiesburg as a conf/mtg/event destination, service and staff were rated highest followed by food and then meeting space. The venues of the conf/mtg/events are as follows: A local church, employment, Forrest General Hospital, Hattiesburg, Heritage UMC, Lake Terrace Convention Center, Panera, Petal Red Room, Railroad Station downtown, USM School of Music

VISIT HATTIESBURG

Resident Survey Respondents

Methodology

Resident questions were prepared as part of the visitor survey prepared by the Young Strategies research team and approved by VisitHATTIESBURG. Many travel partners of VisitHATTIESBURG deployed the survey invitation to their databases that included residents and visitors. Those that identified themselves as residents of Forrest/Lamar/Perry Counties and/or the City of Hattiesburg answered questions related to hosting visitors in their Hattiesburg area homes.

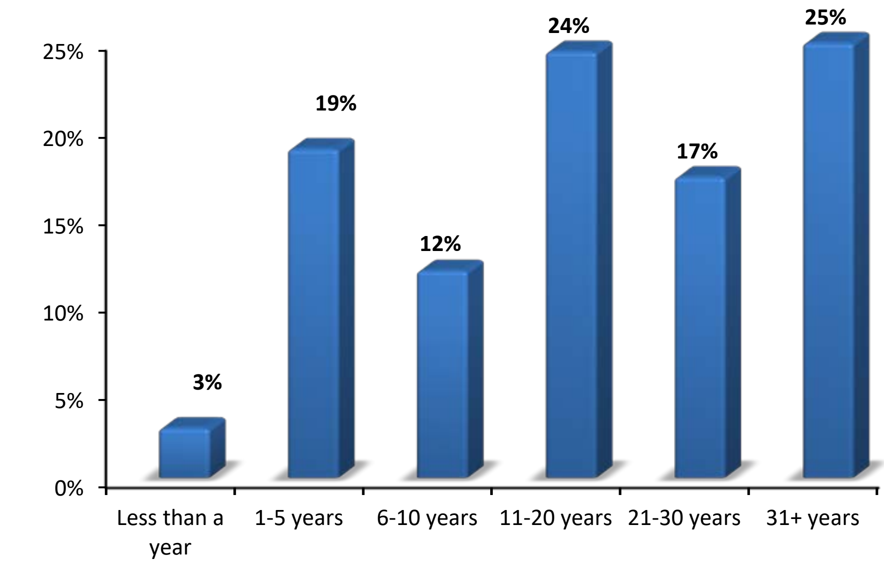
Residents were defined as living in Perry, Lamar or Forrest Counties.

All recipients completing the online survey were offered the opportunity to be entered into a chance to win one of two $250 VISA gift cards.

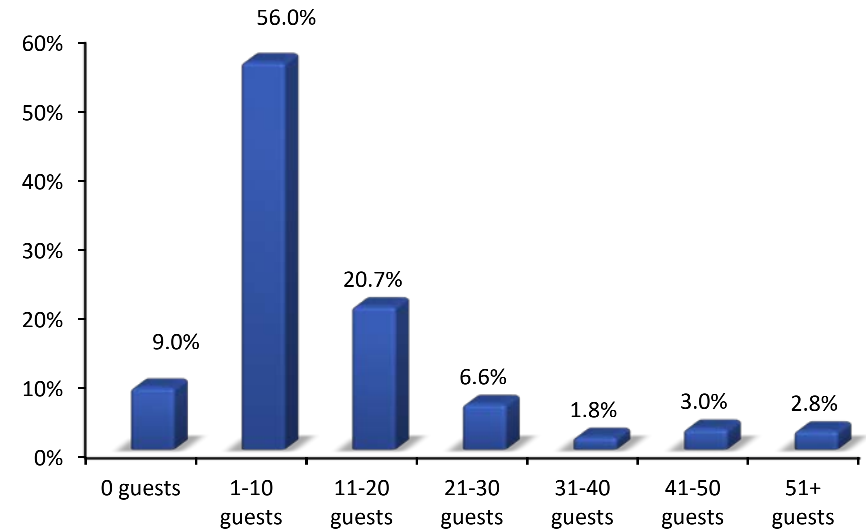
A total of 808 residents responded to the YSI visitor survey. N=808


Respondent Demographics		Residents of Hattiesburg Area
Average Age		**44.9 years old**
Gender		
n=739	**Female**	**66.9%**
	Male	31.1%
	Prefer not to answer	1.6%
	Other	0.4%
Occupation		
n=696	**Healthcare industry**	**16.7%**
	Education-professor/teacher	**14.2%**
	Retired	**8.2%**
	Professional/technical	**5.8%**
	Executive/manager	**5.0%**
	Self-employed	**5.0%**
	Banking/Financial	4.7%
	Homemaker/stay at home parent	4.5%
	Student	4.2%
	Sales/buyer	3.9%
Level of Education		
n=726	**College degree**	**43.8%**
	Graduate school	**40.4%**
	Some college	10.2%
	High school graduate	3.4%
	Technical school	0.8%
	Grade school	0.6%
	Some high school	0.4%
Ethnicity		
n=737	**White / Caucasian**	**85.6%**
	Prefer not to answer	7.1%
	Black or African American	5.4%
	American Indian or Alaskan Native	1.5%
	Hispanic or Latino	1.2%
	Asian or Pacific Islander	0.8%

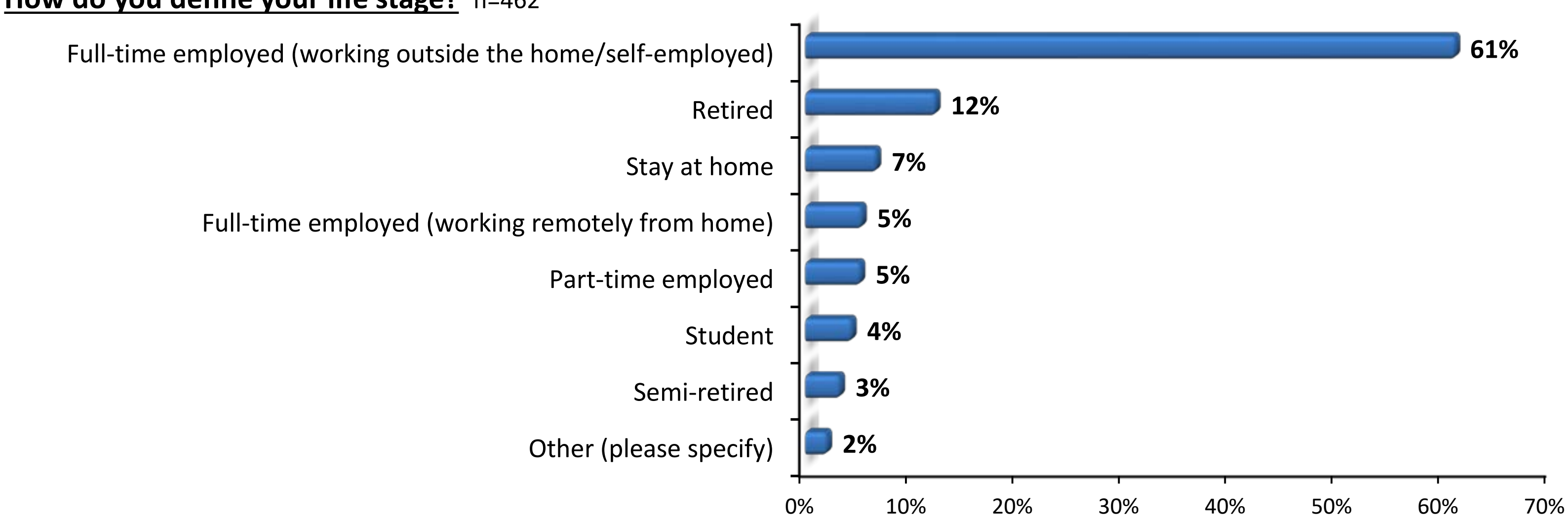
Please tell us how many years you have lived in Forrest/Lamar/Perry Counties / Hattiesburg, MS area.. n=808



Please estimate the TOTAL number of overnight guests you hosted in your home last year? n=757

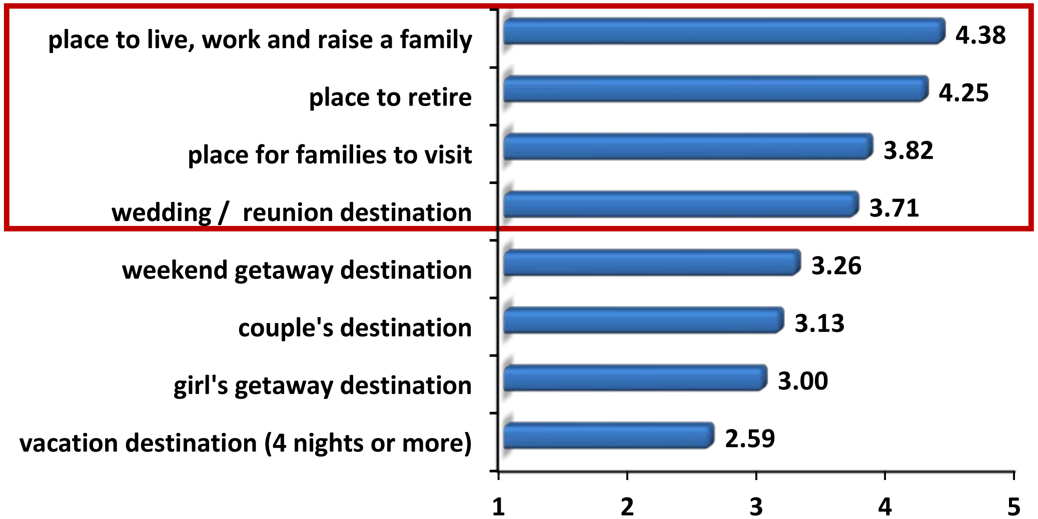


How do you define your life stage? n=462



As a resident, what words would you use to describe the Hattiesburg, MS area to others who have never been? n=755

Rate the Hattiesburg, MS area on each of the following statements using the scale provided below. The Hattiesburg, MS area is a great... n=502

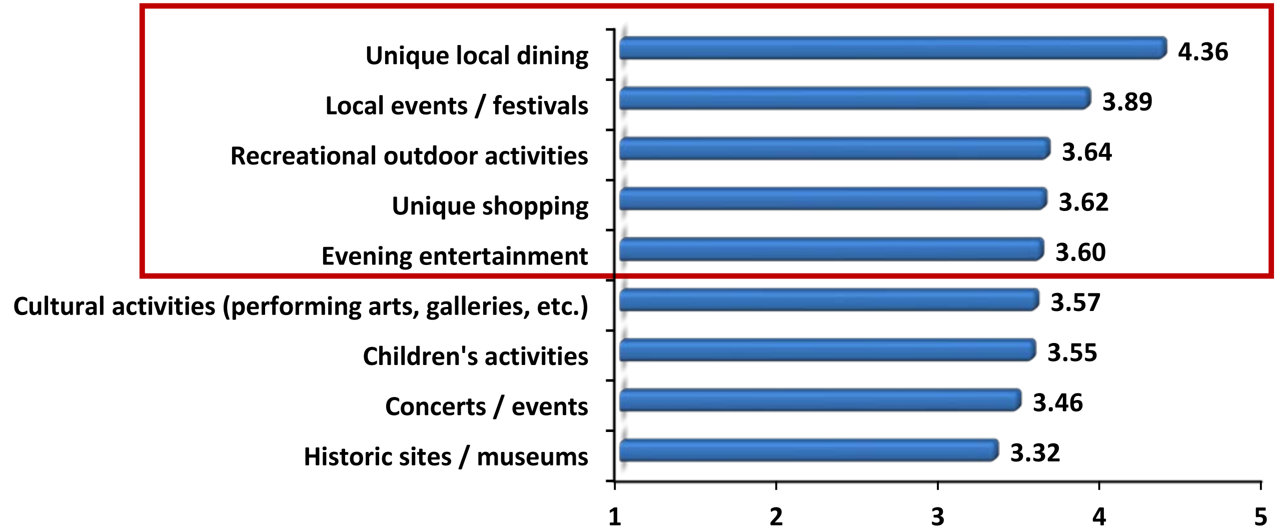


Observations:

- When asked to choose what makes the Hattiesburg area great, residents rated the area highest as a great place to live, work and raise a family, a great place to retire, a great place for families and a great wedding/reunion destination.
- A great weekend getaway, couple's destination, girl's getaway destination rated much lower at 3.26 – 3.00, while vacation destination for 4 nights or more came in last at 2.59. These ratings indicate a low perception with residents that Hattiesburg is a getaway destination.

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	N/A / Don't know	Weighted Average
place to live, work and raise a family	52.02%	37.84%	7.02%	2.21%	0.78%	0.13%	4.38
place to retire	43.77%	33.94%	12.84%	2.36%	1.05%	6.03%	4.25
place for families to visit	22.29%	50.98%	15.25%	7.69%	3.13%	0.65%	3.82
wedding / reunion destination	21.90%	44.33%	18.12%	8.60%	4.82%	2.22%	3.71
weekend getaway destination	12.37%	34.51%	26.82%	17.06%	8.07%	1.17%	3.26
couple's destination	10.56%	30.90%	27.38%	20.60%	9.26%	1.30%	3.13
girl's getaway destination	9.36%	25.10%	26.14%	23.80%	10.01%	5.59%	3.00
vacation destination (4 nights or more)	5.34%	15.36%	28.78%	31.38%	17.19%	1.95%	2.59

When hosting friends, family or business guests in your home, please rate the level of satisfaction with the following experiences in the Hattiesburg, MS area. Please rate on a scale where 1 is poor, 3 is average and 5 is excellent. n=769



	Excellent	Good	Average	Poor	Very poor	N/A	Weighted Average
Unique local dining	**50.07%**	**33.68%**	**10.53%**	**1.30%**	**0.65%**	**3.77%**	**4.36**
Local events / festivals	**25.55%**	**42.63%**	**20.34%**	**5.61%**	**1.56%**	**4.30%**	**3.89**
Recreational outdoor activities	**18.64%**	**40.03%**	**23.21%**	**10.04%**	**3.13%**	**4.95%**	**3.64**
Unique shopping	**15.76%**	**38.41%**	**31.38%**	**7.16%**	**2.08%**	**5.21%**	**3.62**
Evening entertainment	**18.10%**	**37.50%**	**23.05%**	**10.42%**	**3.78%**	**7.16%**	**3.60**
Cultural activities (performing arts, galleries, etc.)	16.73%	35.56%	25.49%	11.24%	2.75%	8.24%	3.57
Children's activities	12.40%	35.64%	23.11%	9.14%	2.87%	16.84%	3.55
Concerts / events	17.19%	32.68%	23.31%	15.49%	4.30%	7.03%	3.46
Historic sites / museums	9.42%	31.68%	30.37%	15.97%	2.88%	9.69%	3.32

When hosting friends, family or business guests in your home, please rate the level of satisfaction with the following experiences in the Hattiesburg, MS area. Please rate using the satisfaction scale below.

Other comments: n=30

- Base for visiting adjacent attractions = good
- Better high-end grocery stores, (whole foods, trader joe's, sports, fresh market)
- Camping
- Close proximity to the coast and New Orleans
- Convenient to coast, Jackson New Orleans
- Festival south
- Festival south, musical concerts, recitals, drama @ USM, carey
- Festival south bring my whole family here every year!
- Friends do love live at 5
- I am usually stumped when non-locals ask where the hotspots are each night. Especially if they not drinkers.
- I don't host guests.
- It is a retirement city with very little to do.
- Lake Thoreau (2)
- Live at 5 music
- Local breweries
- Love ollie at U.S.M.
- Need more parks and places for families and children; teens need things to do as well
- Need more weekend events for retirees. It is a certified retirement city!
- R3sm volunteer house hosts visitors from all across the United States and Canada. We try to make sure the guests have a wonderful experience.
- Sports (2)
- The trains at train depot need restoration and better ways to view them, as per one of my visitors.
- There isn't much to do with out-of-town guests.
- They enjoy Hattiesburg for Pokemon Go too
- They only stayed two days
- This are all very subjective opinions
- UBER Driver and love the people of Hattiesburg
- We have too many confederate flags
- We've had a few good bands come to town, but I'd love to have an amphitheater or other event space that could accommodate bigger names. Not only would it be great for us locals, but it would draw crowds that currently have to go to Brandon or NOLA (or further) for concerts. Would have a very positive impact on our economy. Not sure why we aren't currently scheduling larger concerts at the Multi-Purpose center.

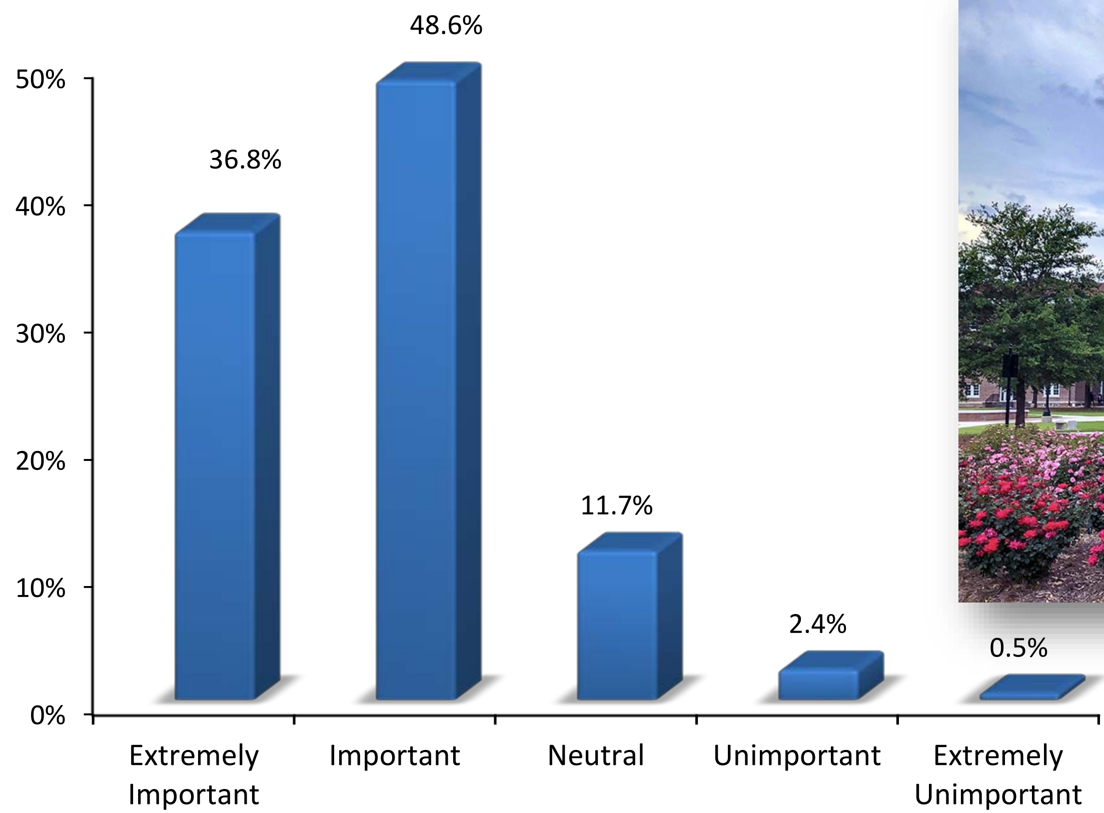
Travel/Tourism Industry Importance

Please tell us the level of importance of the travel / tourism industry in the Hattiesburg, MS area?

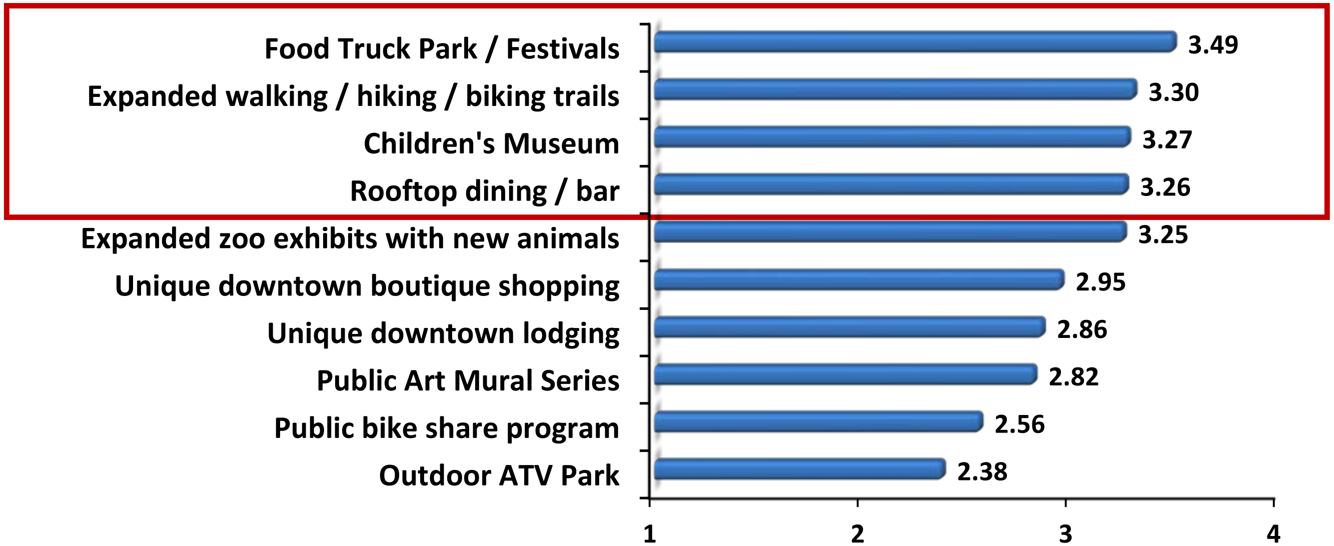
n=751

Observations:

- An overwhelming majority of residents (85%) reported the travel/tourism industry as having an extremely high or high level of importance in the Hattiesburg, MS area. The remaining 12% of the residents responded neutral and only 3% indicated the travel industry is unimportant in the Hattiesburg, MS area.



Please tell us if any of the following activities/experiences would appeal if offered in the Hattiesburg, MS area. n=744



Observations:

- Residents chose food trucks/festivals, expanded walking/hiking/biking trails, a children's museum and roof top dining/bar as the most appealing activities to be developed in the Hattiesburg, MS area.

	Extremely	Very	Somewhat	Not at all	Weighted Average
Food Truck Park / Festivals	**61.19%**	**28.44%**	**8.63%**	**1.75%**	**3.49**
Expanded walking / hiking / biking trails	**51.08%**	**30.41%**	**16.22%**	**2.30%**	**3.30**
Children's Museum	**50.74%**	**30.69%**	**13.46%**	**5.11%**	**3.27**
Rooftop dining / bar	**51.35%**	**27.57%**	**16.76%**	**4.32%**	**3.26**
Expanded zoo exhibits with new animals	**49.53%**	**30.01%**	**16.55%**	**3.90%**	**3.25**
Unique downtown boutique shopping	34.74%	32.16%	26.19%	6.92%	2.95
Unique downtown lodging	33.74%	29.01%	27.13%	10.12%	2.86
Public Art Mural Series	28.38%	32.16%	32.16%	7.30%	2.82
Public bike share program	22.15%	27.17%	34.78%	15.90%	2.56
Outdoor ATV Park	20.54%	22.30%	31.35%	25.81%	2.38

<u>Please tell us if any of the following activities/experiences would appeal if offered in the Hattiesburg, MS area. List any other specific activities of interest to you</u>. *Page 1 of 4* n=171

Respondent's verbatim comments below:

- A large event arena/venue for touring bands, theatre tours, etc.
- A place to go trail riding.
- A Stadium Field at Tatum Park. It could host major soccer events (teams/matches) as soccer continues to grow in popularity.
- A walking tour of the civil rights and historical music scene would be enticing.
- Additional festivals like Downtown Crawfish Jam, Hubfest, music festivals, food competitions like Downtown BBQ Showdown, K&B Chili Cookoff.
- Adult Arcade/games
- Alcohol events seem to attract large crowds
- All of the above
- All of the above! I've had MUCH exposure to bike share programs in other countries that are extremely successful!
- All of these are good ideas; however, if it takes forever to get to them, not worth it. We need a road that circles our town with easy off and on access. Hwy, 11 needs more turn lanes onto Hwy. 98 so traffic doesn't back up there. Also a right turn lane at Dr. Thames office onto Hardy St./Hwy.98. And Sam's and Wal-mart are the worse.
- Amphitheatre for better music acts (Like Riley Center/Brandon Amphitheater)
- Amusement park ; public parks
- Amusement parks
- Art throughout the city (beyond downtown) art in midtown would be spectacular
- Arts center
- Baseball Complex to compete with the new one in Gulfport, Pickleball courts to keep up with Biloxi/Gulfport/Brandon and Jackson
- Beer and wine festivals!
- Better infrastructure for biking would be huge
- Big name artist and shows
- Bike paths
- Bike share is a great idea, but only if Hattiesburg becomes more pedestrian friendly... Bike lanes and sidewalks.
- Biking clubs, guide led walk, emphasis and promotion of natural resources like our rivers, lakes, creeks, public land's, monuments ts,and University-sponsored events like the ones at Lake Thoreau
- Biking friendly roads
- Capitalize on nature. There's so much beautiful land here. Advertise the current live music events more and bring in Oak Grove residents, who have money to spend.
- Car museum
- Cigar Bar, Lounges with unique food & drinks, Museums, Comedy, Music, Holiday events
- Classical music concert
- Concert arena
- Concert Venues - indoor and outdoor
- Concerts (4)
- Concerts, festivalsCurrent "modern art" installations around the city are horrible. Swan thing is silly and has no relationship to the area. Should have been a train (hub city) or something to do with music since we are the birthplace of rock and roll. Need to highlight that we are the birthplace of rock and roll with an awareness campaign and some sort of tourism/museum tie in to that.
- Current "modern art" installations around the city are horrible. Swan thing is silly and has no relationship to the area. Should have been a train (hub city) or something to do with music since we are the birthplace of rock and roll. Need to highlight that we are the birthplace of rock and roll with an awareness campaign and some sort of tourism/museum tie in to that.
- Destination places for family fun, such as a water park, other places and events that I can send visitors to.
- Do we have the $,and population base? More public display/acknowledgement of public school activities.
- Dog park
- Drawing, painting, photography, festivals, restaurants
- Drive in movie
- Environmental initiatives that reflect the residents' concern for our city/area. Environmentally conscious event planning with less waste.
- Extended use of the building that houses the rodeos
- Family Activity centers (Dave &Buster's/The Main Event) and more Upscale Dining Options

Please tell us if any of the following activities/experiences would appeal if offered in the Hattiesburg, MS area. List any other specific activities of interest to you. ***Page 2 of 4*** n=171

Respondent's verbatim comments below:

•Family fun
•Family-oriented locations for games, mini-golf, water/splash pad would be nice for people who already visit.
•First Fridays downtown with music/food/local businesses
•Fishing and camping
•Fishing, Shooting range, Camping- RV parks with thongs to do there.
•Football home game at USM
•Free events
•Gardens; art museums; clubs
•Go cart track, have large scale comedy and music acts play at Reed Green, and The Rock.
•Golf Cart friendly
•Golf, Par 3 or Top Golf
•Goofy golf
•Goofy golf course, better bowling alley
•Green spaces/forest
•Hattiesburg needs a large indoor concert venue or a medium outdoor concert venue
•HCLO's performances at a larger venue.
•Historical museum
•Hosting sporting events.
•Hot air balloon rides at chain park, haunted house listing in historic neighborhoods
•I would love to see more outdoor activities.
•If you want me on a bike, I need access to sidewalks. 40th Ave & Westover not having sidwalks is a major hinderance to that culture. Especially with the unsafe road-side walking conditions on both roads.
•Improve marketing to business travelers to Hattiesburg
•Improved public tennis facilities
•Improvements to sports complexes to attract more tournaments and events
•In other parts of the US bike share programs have delivered sub par cycling experiences while killing exisitng bicycle shops that has served those areas for decades. I would strongly - STRONGLY oppose any bike share venture here for that reason. Once the bike shops are gone then the activity of cycling is no longer supported by those able to properly families with appropriate bike choices and also maintain those investments. PLEASE involve me in any discussions regarding bike share.
•Increased arts activities
•Indoor farmers market, markers marker combo
•Indoor recreational swim facility or expanded water activities at the zoo or ice skating rink or ifly. Something unique that can't be found in a wide radius.
•Indoor rock climbing walls; Comedy Club/festival; IMAX Theater
•Indoor soccer field
•Infill mixed development east of 40th. 40th
•Info on civil rights movement
•Invest in our future by improving the public schools. The rest of these ideas are useless and will never increase the status, size, or desirability of Hattiesburg if the public school system remains as a pit of corruption, violence, and poor education. 2) Improved opportunities for recreational sports programming at all ages. Adult rec sports are terribly unorganized and youth sports are filled with politics that taint the fun. 3) A premier venue for concerts and other events.
•It is hard competing with the casinos but we need more musical concerts here
•Just a comment on a children's museum - there are children's museums in Jackson and in the MS Gulf Coast, as well as Mobile. It would need to be unique to all of those places in order to draw visitors from outside Hattiesburg to help support it.
•Kayaking, music
•Keep entertainment cost down, keep family friendly.

Please tell us if any of the following activities/experiences would appeal if offered in the Hattiesburg, MS area. List any other specific activities of interest to you. ***Page 3 of 4*** n=171

Respondent's verbatim comments below:

•Lake Thoreau (5)
•Larger music festivals (if we could bring in big name bands a la Hangoutfest, it would be a huge draw), outdoor movies in the park (check out the Enzian framework in Orlando), larger farmer's market ON THE WEEKEND - a lot of people can't get off work by the time the downtown Farmer's Market is closed, more diverse restaurant choices - our three main choices are Southern style cuisine, Chinese, and Mexican...and so so many more.
•LGBT events
•Like Austin, TX have a yearly arts festival with music in every bar downtown and a graffiti wall with an open stage year around where everyone can paint and play music. You have a start with the Juke
•Little theatre
•Maker faires, art walks
•Malls, museums, historical places, parks, better food, top golf etc
•Mini golf
•More bars and restuarants
•More bike lanes necessary
•More bike paths. Less confederate statues.
•More comedy events
•More diverse festivals or charity events
•More free musical events to allow local musician's to showcase their talents. A free skateboard park for kids of all ages. A free roller skate park as well, could be part of the skateboard park. May help keep kids out of trouble and off of drugs and other activities. More music concerts, like famous musicians. Hattiesburg has to travel to the Coast, Brandon or NO to see concerts now. WE used to have them at Reed Green Coliseum
•More live music
•More music concerts
•More outdoor community based events like live at 5 and farmers market
•More public events at "cultural arts center"
•More running events
•More sidewalks. Bus routes in the evenings and weekends.
•More sports activities.
•More swimming facilities, roller skating ring, movie theater downtown,,, amphitheater, frequent mass transit...and covered waiting areas, and more loft apartments
•More theater and concerts
•More triathlons and races!
•More vegan/veggie restaurant options
•Mostly, things to do outside.
•Murals need to be very professional.
•Music festivals, outdoor festivals, more trails
•Music. Bring the artists! Remember the local response when the lumineers played the saenger earlier this year? Exactly.
•National music acts and plays.
•Need a venue to house 2-3k people that isn't just seated. The Saenger is amazing for what it is, but it's not a great venue for a rock concert.
•Need more sidewalks for bike share
•NFL football team
•Nightclub and concert venues .
•On above, we have LLT. Nothing can beat that.
•Outdoor art walks
•Outdoor community activists Example: outdoor shuffleboard
•Outdoor concerts
•Outdoor movie at the park where live at 5 is!!
•Outdoor shuffleboard courts, racquetball courts, man made ponds or fountains with a walking track around them. More outdoor venues to enjoy.
•Outlet shopping
•Pickleball courts!
•Playgrounds and parks- done right!
•Pools, water parks
•Pub crawls!
•Public pool like a natatorium that could be used all year for staying cool and joint friendly exercise
•Public Pool with slides and water park area!
•Putt putt golf

Please tell us if any of the following activities/experiences would appeal if offered in the Hattiesburg, MS area. List any other specific activities of interest to you. ***Page 4 of 4*** n=171

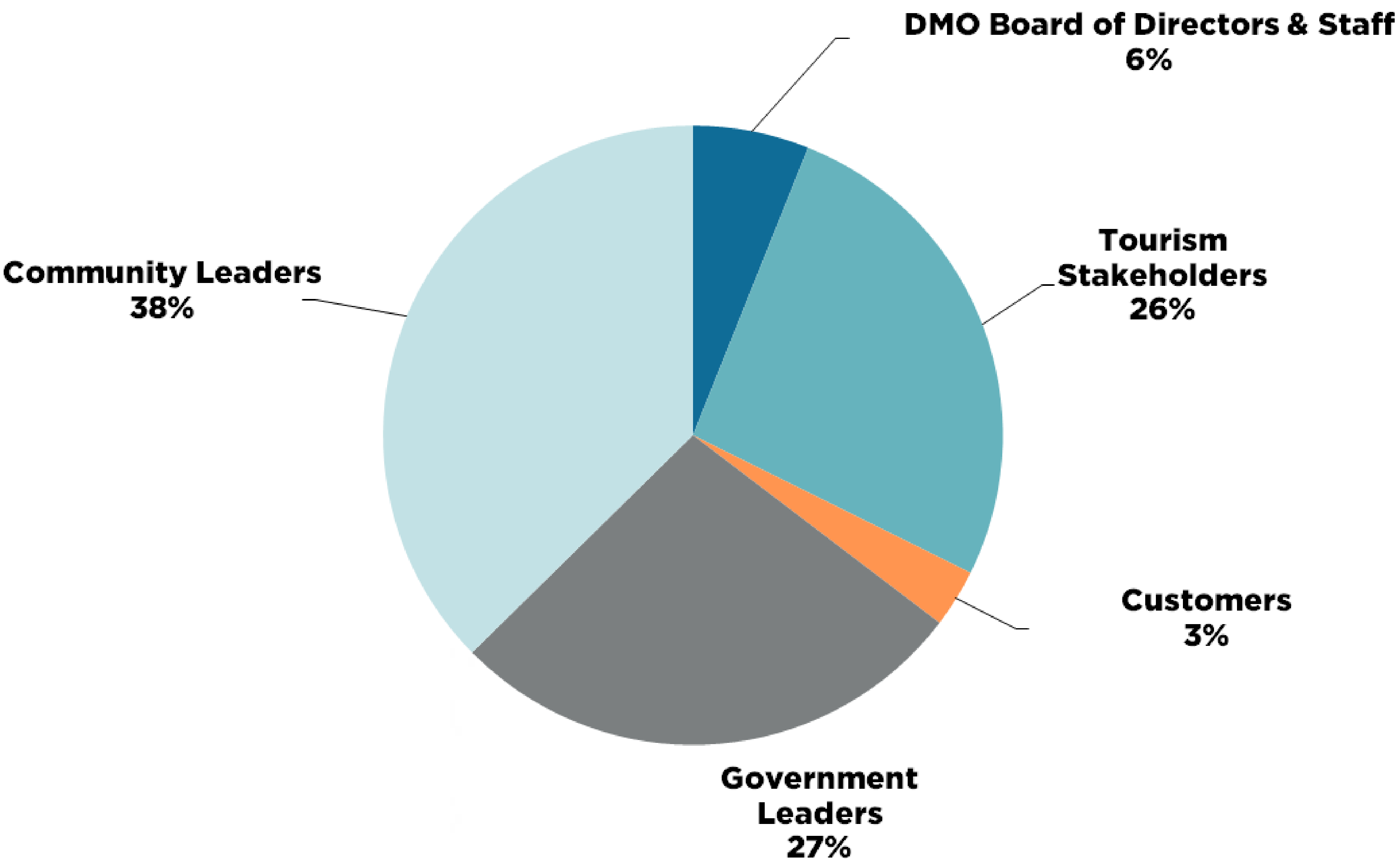
Respondent's verbatim comments below:

- Restaurants need to be unique and vary menus. Out west supports our chain restaurants busy, but don't support local. West must support downtown and it doesn't.
- River fun, kayaking. Canoes, tubes...
- Rock and Bowl, Wedding Chapel, Art and Music Classes, Writing and Photography Workshops, Cooking Classes, Concerts, Dog Shows, Classic Theatre, High School Show Choir performances, Boating
- Rock climbing
- RV facilities near town.
- RV parks
- Safer walking/ bike conditions on Trace
- Science fiction/fantasy conventions
- Science museum, multi - cultural museums/activities
- Sculpture Park, craft beer, live music
- See answers to previous questions.
- Shooting sports facilites open to the public
- Small scale aquarium, free community splash pads, drive in theatre, popcorn store/ candy shop, downtown family-friendly outdoor movie night, organized family activities
- Soccer
- Soccer complex
- Splash pads for children, unique dining experiences, and a drive-in movie theatre.
- Sporting events
- Sports
- Swap meets, car shows, gun shows,
- The Lake Thoreau Environmental Center brings visitors to town and would be a good location for a Children's Science Museum.
- Top Golf, boutique bowling alley, dueling piano bar
- Uber/Lift scooter rentals could be a cool touch.
- Unique outdoor spaces and adult entertainment venues
- Water front amenities along the creek
- Water park
- Water park / outdoor concert venue
- We love crushed gravel trails for running with friends who visit us. More trail running options closer to downtown would be great because getting to West Hburg can take a long time just to use the off-road trails.
- We love Lake Thoreau
- We LOVE the zoo! Outdoor activities and emphasis on things that can be done by all- outdoor concert series is wonderful. Safe places where people can ride a bike and not get shoved off the road by a vehicle- important. More than two parks for children to play.
- We need sidewalks and other such pedestrian access.
- When I check 'Extremely' on expanded trails I mean speicifcally expanded trails that give access within the city. The lack of that infrastructure on Hardy/South Side of Hardy is what makes a Public Bike share program only 'somewhat' appealing to me.
- Where are the alligator tours?
- With its unique incorporation of local residents, enhance Hattiesburlesque
- Women's homeless shelter program and facility
- Would LOVE to see a children's museum here.
- Year-round music events which don't fall on school nights that would be child friendly and not too late. Perhaps afternoons in the park, or Friday late afternoon concerts. The infrastructure is in place for Hattiesburg to do that, its simply a matter of coordination between a number of groups to make it happen.
- Youth athletics
- Youth sport events
- Zoo, food, shopping (new and consignment)

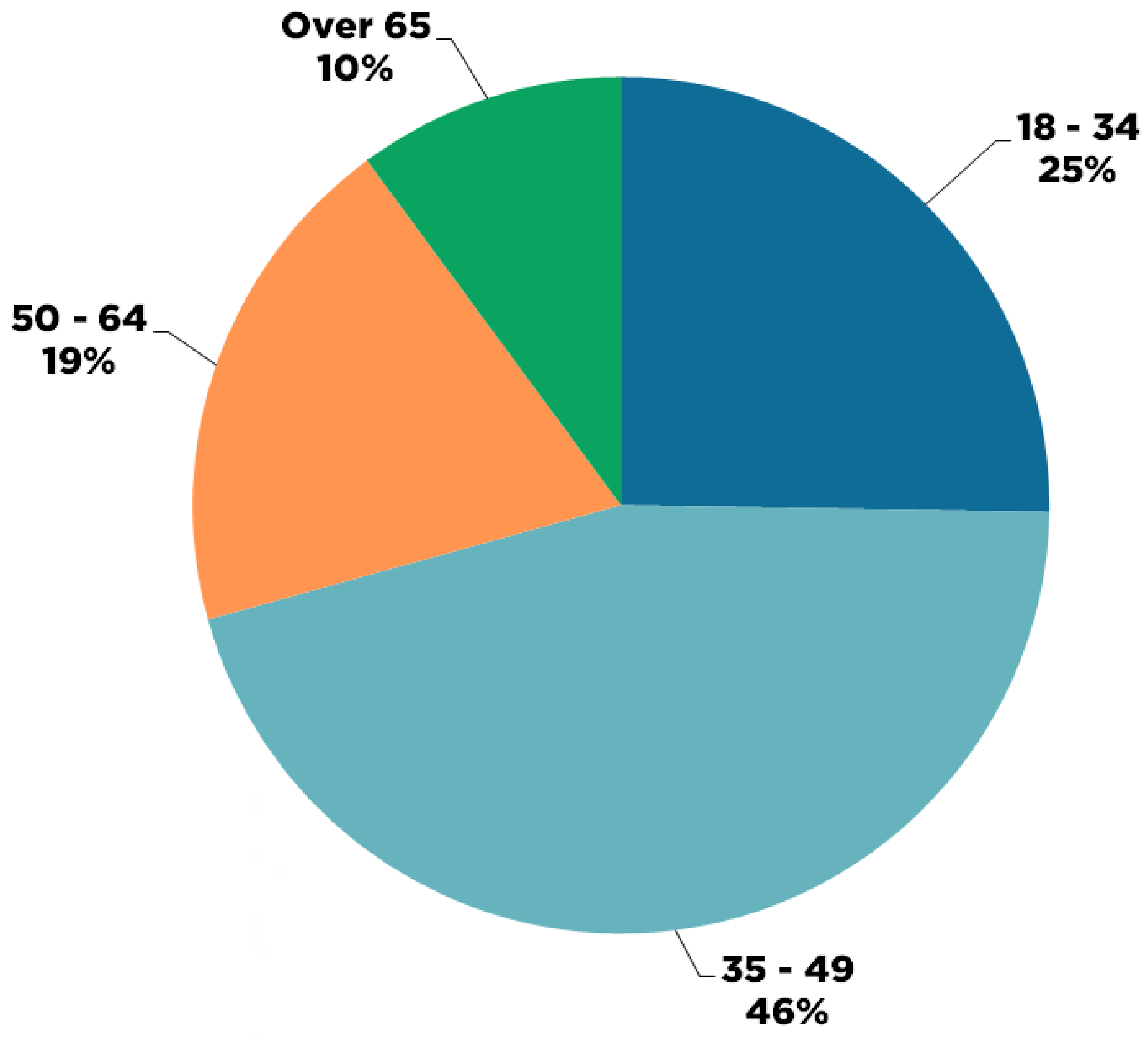
Multi-User Diagnostic Assessment: Hattiesburg, MS

September 26, 2019

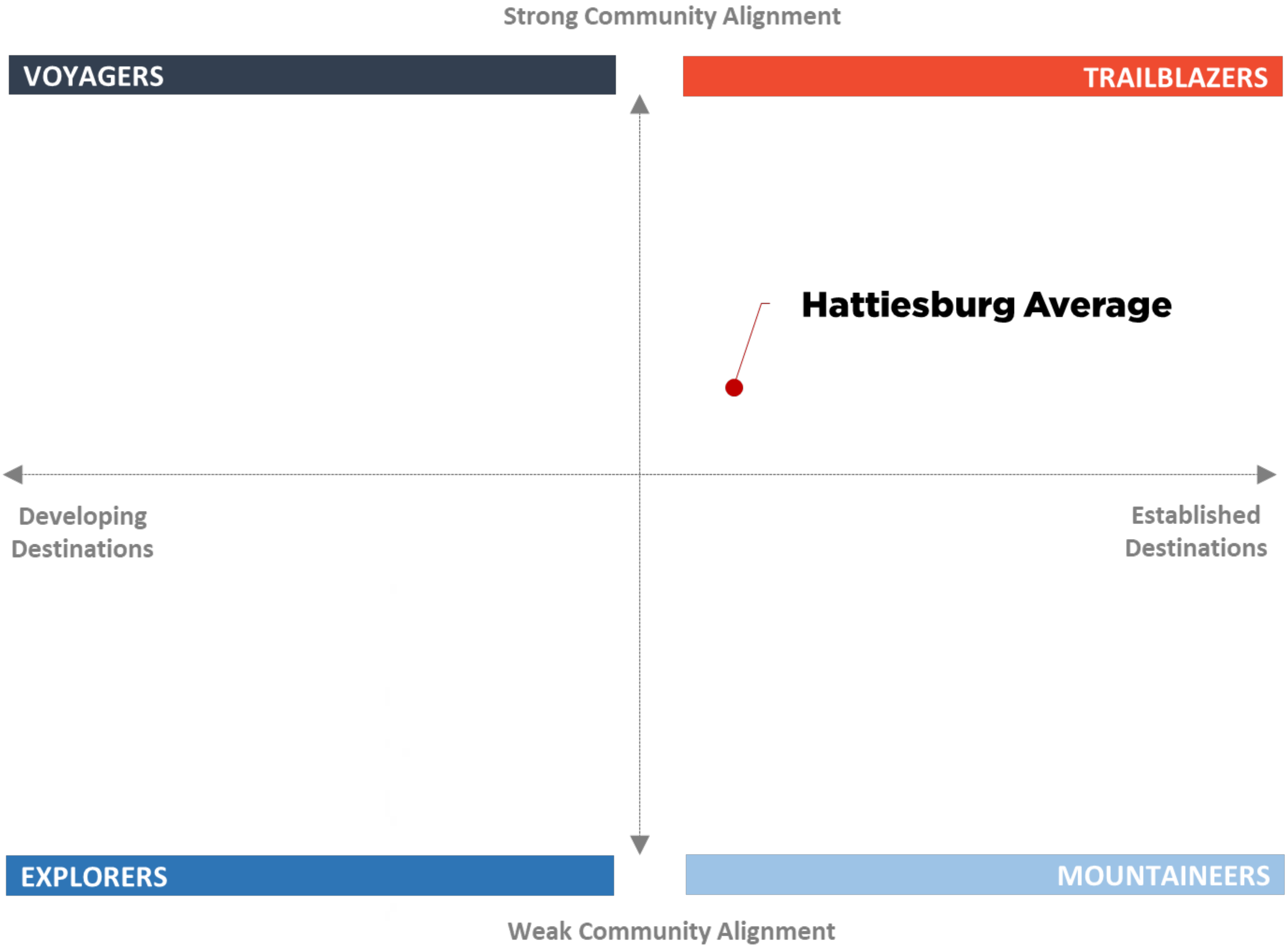
99 Participants



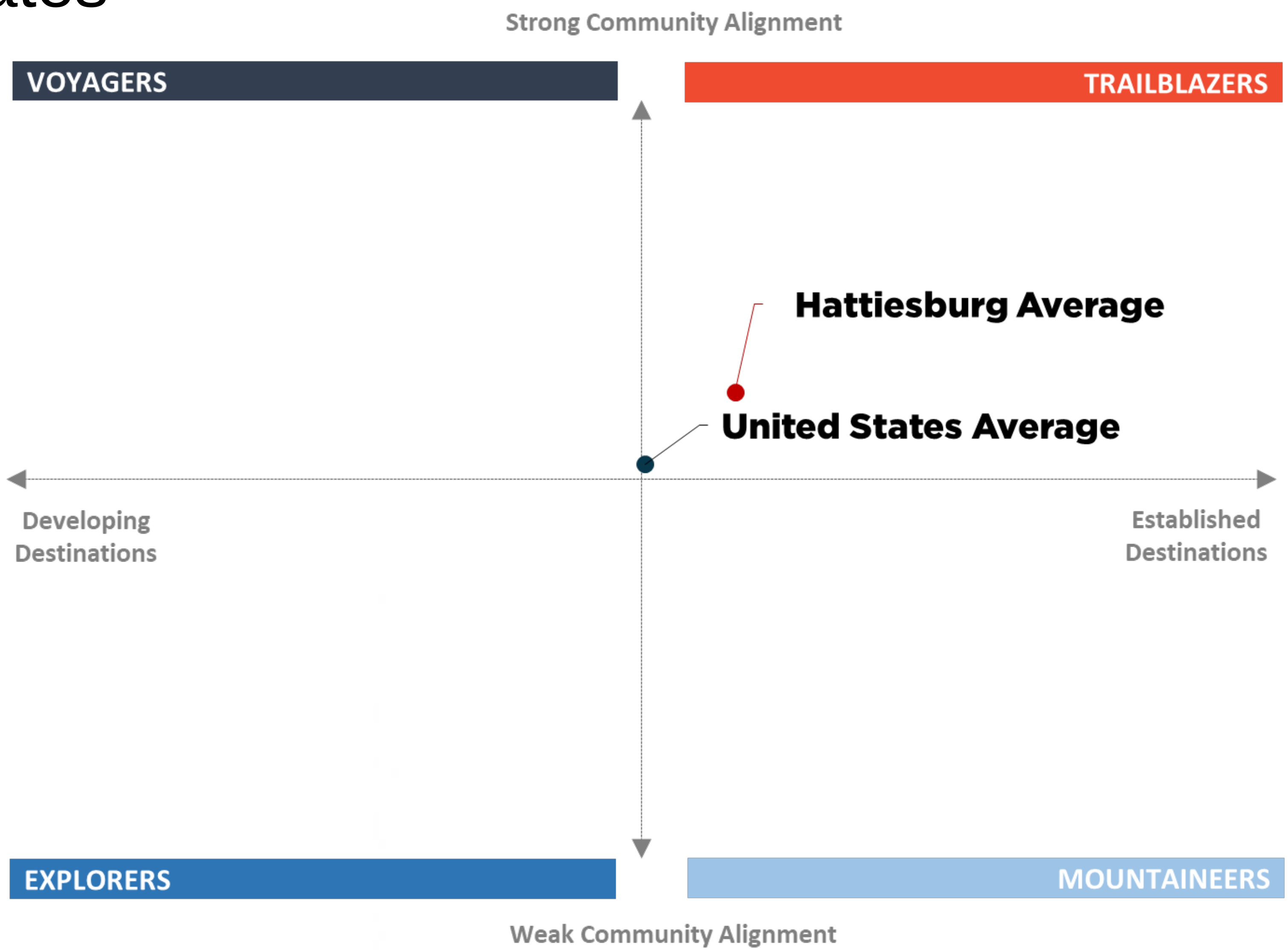
Age Demographic



Hattiesburg, MS Overall Assessment – Industry



Hattiesburg, MS Overall Assessment – United States



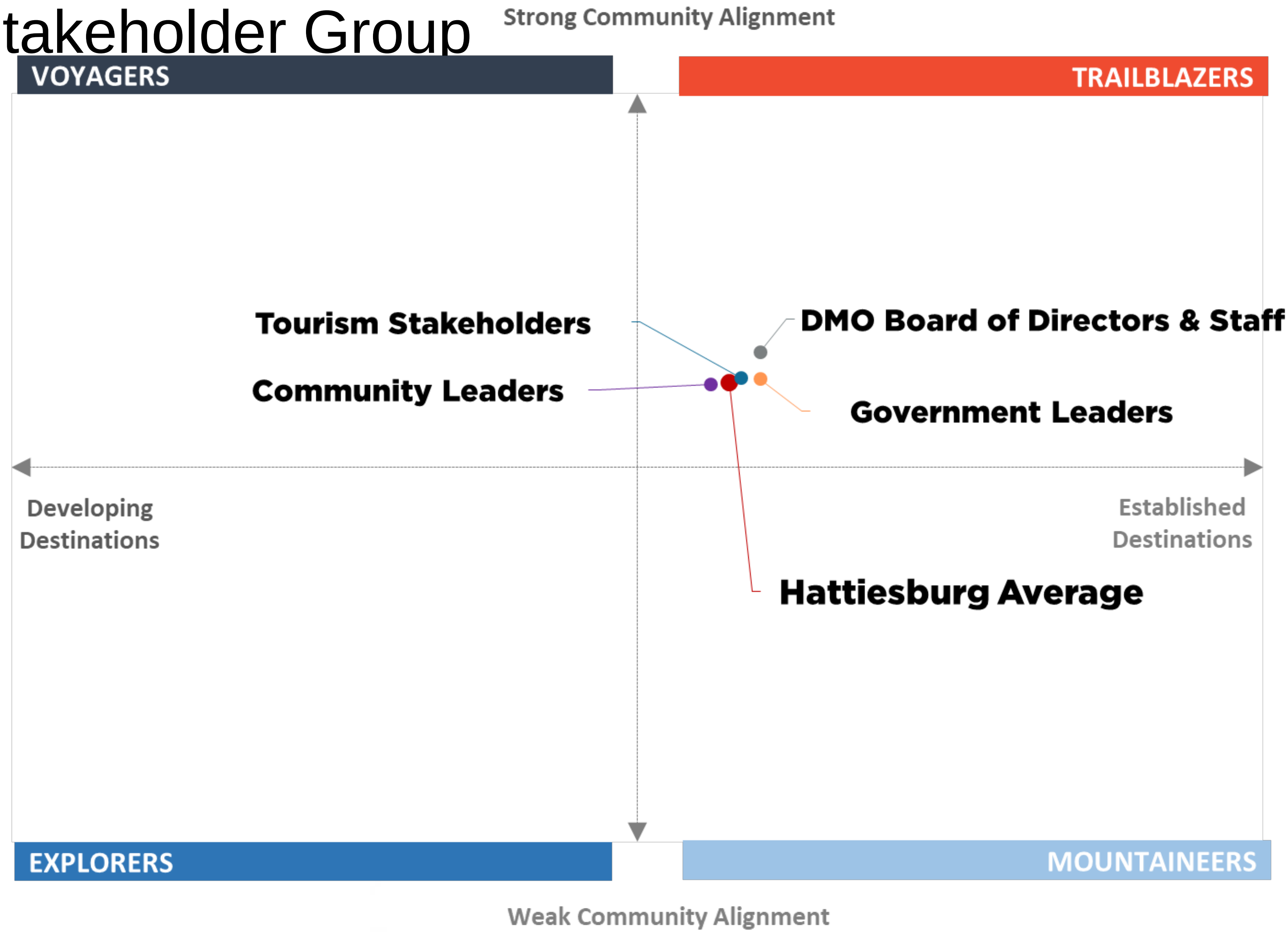
Trailblazers

These DMO's and destinations realize the benefits of their tourism vision and work to keep the community and marketplace engagement fresh and relevant.

Key Strategic Challenges

- Avoiding complacency
- Continuing to evolve the destination that delivers a compelling and authentic marketplace ex
- Keeping your eye on the ball

Hattiesburg, MS Overall Assessment – Stakeholder Group



Destination Strength Variables

Destination Strength Rankings – Hattiesburg, MS

	Relative Importance	Perceived Performance
Attractions & Entertainment	1st	5th
Brand	2nd	4th
Destination Performance	3rd	2nd
Accommodation	4th	1st

Destination Strength – Report Card

Variable	Relative Importance (0-100%) Industry Average	Relative Importance (0-100%) Hattiesburg Average	Relative Importance (0-100%) Standard Deviation	Perceived Performance (1-5 scale) Industry Average	Perceived Performance (1-5 scale) Hattiesburg Average	Perceived Performance (1-5 scale) Standard Deviation
Attractions & Entertainment	10.8%	11.0%	0.2%	3.6	3.8	0.6
Brand	10.4%	11.0%	0.2%	3.5	3.9	0.6
Destination Performance	10.0%	10.5%	0.1%	3.7	4.0	0.5
Accommodation	10.5%	10.5%	0.1%	3.5	4.2	0.6
Events	9.8%	10.1%	0.2%	3.6	4.0	0.6
Mobility & Access	10.1%	10.0%	0.2%	3.0	3.1	0.8
Outdoor Recreation & Sports Facilities	9.5%	9.9%	0.2%	3.2	3.4	0.8
Convention & Meeting Facilities	9.8%	9.6%	0.3%	3.1	3.7	0.8
Communication & Internet Infrastructure	10.0%	9.5%	0.4%	3.2	3.6	0.6
Air Access	9.1%	7.9%	0.4%	3.1	2.6	0.9

DESTINATION STRENGTH - Hattiesburg	**3.65**
INDUSTRY AVERAGE DESTINATION STRENGTH	**3.36**

RESULTING SCENARIO	**TRAILBLAZERS**

Note
Green shading signifies that the destination **outperformed** the industry average by greater than 0.2.
Yellow shading signifies that the destination **underperformed** the industry average by greater than 0.2 but less than 0.4.
Red shading signifies that the destination **underperformed** the industry average by greater than 0.4.

Destination Strength – Stakeholder Report Card

Variable	Perceived Performance (1-5 scale) Hattiesburg Average	DMO Board of Directors & Staff	Tourism Stakeholders	Customers	Government Leaders	Community Leaders
Attractions & Entertainment	3.8	3.9	3.7	2.8	3.8	3.9
Brand	3.9	4.1	3.7	3.2	4.0	3.8
Destination Performance	4.0	4.1	3.9	3.8	4.0	4.1
Accommodation	4.2	4.5	4.5	3.5	4.1	4.0
Events	4.0	4.1	3.9	3.1	4.2	3.9
Mobility & Access	3.1	3.2	3.2	1.9	3.4	2.9
Outdoor Recreation & Sports Facilities	3.4	3.5	3.6	3.3	3.6	3.2
Convention & Meeting Facilities	3.7	3.4	3.7	2.8	3.6	3.8
Communication & Internet Infrastructure	3.6	3.5	3.9	3.3	3.6	3.6
Air Access	2.6	2.7	2.6	1.2	2.8	2.5

DESTINATION STRENGTH - Hattiesburg	**3.65**
INDUSTRY AVERAGE DESTINATION STRENGTH	**3.36**
RESULTING SCENARIO	**TRAILBLAZERS**

Note
Green shading signifies that the stakeholder group **outperformed** the destination average by greater than 0.2.
Yellow shading signifies that the stakeholder group **underperformed** the destination average by greater than 0.2 but less than 0.4.
Red shading signifies that the stakeholder group **underperformed** the destination average by greater than 0.4.

Attractions & Entertainment

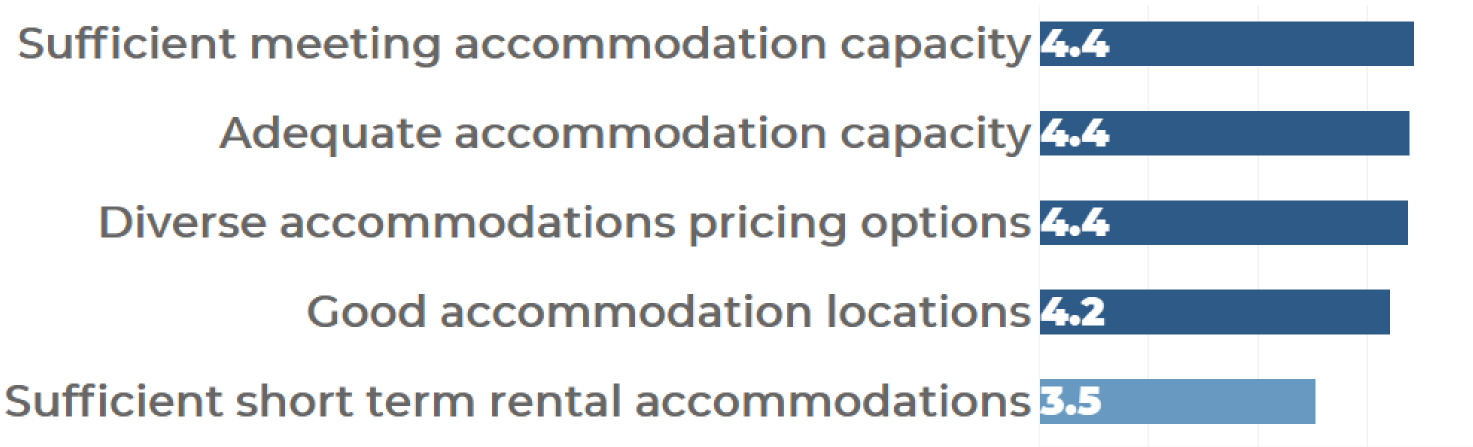
Brand

Leverages social media 4.4
Wide visitor appeal 4.2
Healthy, outdoor and active 4.0
Safe, clean and secure 3.9
Established brand 3.9
Lot to see and do 3.7
Environmentally conscious and sustainable 3.4
High-tech and innovative 3.2

When you think of Hattiesburg, what iconic image comes to mind?

Destination Performance

Accommodation

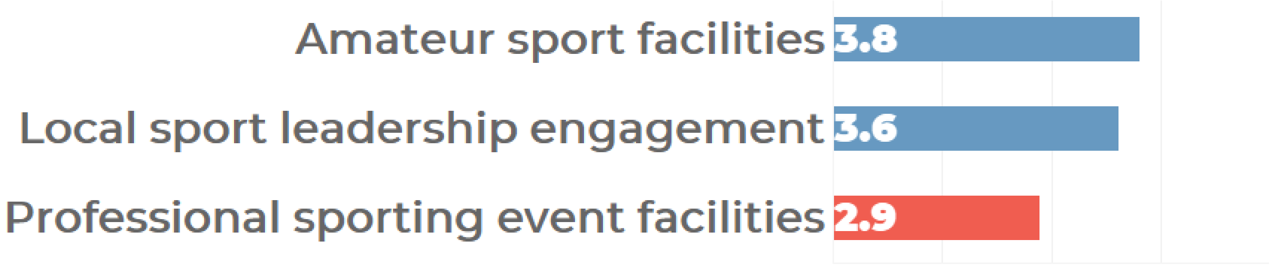


Events

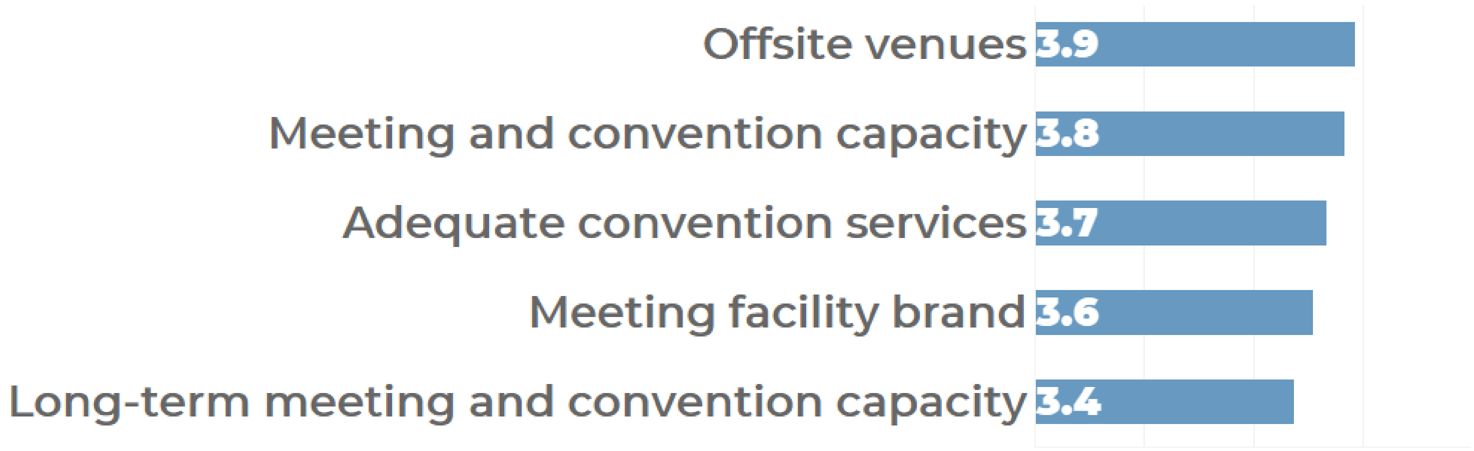

Local government support for events 4.4
Citizen support for events 4.1
Outdoor event capacity 4.1
Public event capacity 4.0
Year-long series of events 3.9
Convention center events 3.3

Mobility & Access

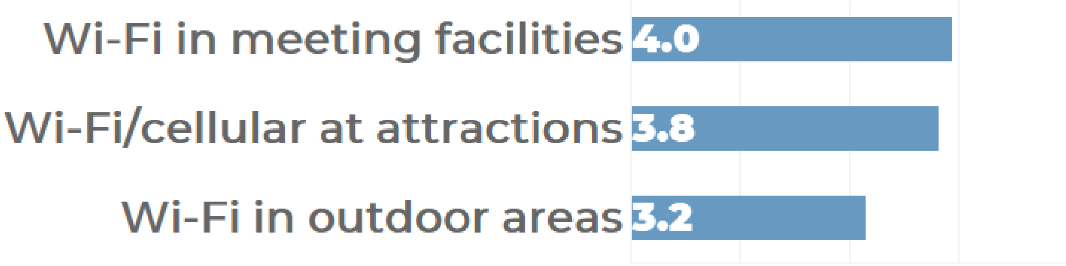
Outdoor Recreation & Sports Facilities



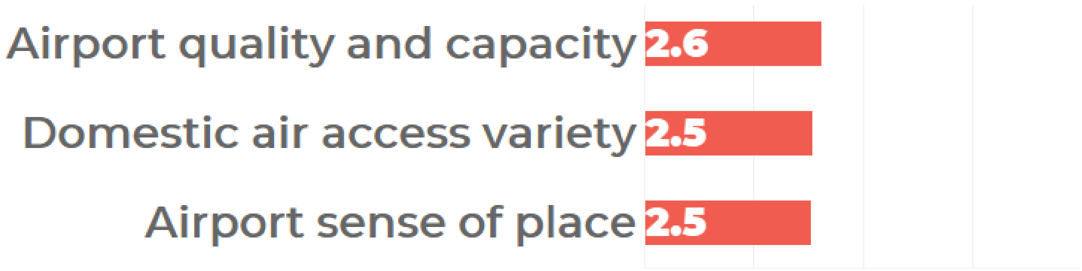
Convention & Meeting Facilities



Communication & Internet Infrastructure



Air Access


Airport quality and capacity
2.6
Domestic air access variety
2.5
Airport sense of place
2.5

Community Support & Engagement Variables

Community Alignment Rankings – Hattiesburg, MS

	Relative Importance	Perceived Performance
Funding Support & Certainty	1st	10th
Policy & Regulatory Environment	2nd	2nd
Industry Support	3rd	4th
Partnership Strength	4th	1st

Community Alignment – Report Card

Variable	Relative Importance (0-100%) Industry Average	Relative Importance (0-100%) Hattiesburg Average	Relative Importance (0-100%) Standard Deviation	Perceived Performance (1-5 scale) Industry Average	Perceived Performance (1-5 scale) Hattiesburg Average	Perceived Performance (1-5 scale) Standard Deviation
Funding Support & Certainty	10.1%	10.2%	0.1%	3.2	3.6	0.8
Policy & Regulatory Environment	10.1%	10.2%	1.0%	3.5	4.2	0.7
Industry Support	10.0%	10.2%	0.1%	3.7	4.1	0.5
Partnership Strength	9.1%	10.2%	0.1%	3.5	4.3	0.5
Economic Development	10.3%	10.1%	0.1%	3.9	4.1	0.5
Hospitality Culture	10.3%	9.9%	0.1%	3.6	4.1	0.8
Workforce	10.2%	9.9%	0.1%	3.2	3.7	0.8
Organization Governance Model	9.5%	9.9%	0.1%	3.7	4.1	0.6
Regional Collaboration	10.1%	9.8%	0.1%	3.6	4.0	0.7
Local Community Support	10.3%	9.8%	0.1%	3.5	3.8	0.5

COMMUNITY ALIGNMENT - Hattiesburg	**4.01**
INDUSTRY AVERAGE COMMUNITY ALIGNMENT	**3.55**

RESULTING SCENARIO	**TRAILBLAZERS**

Note
Green shading signifies that the destination **outperformed** the industry average by greater than 0.2.
Yellow shading signifies that the destination **underperformed** the industry average by greater than 0.2 but less than 0.4.
Red shading signifies that the destination **underperformed** the industry average by greater than 0.4.

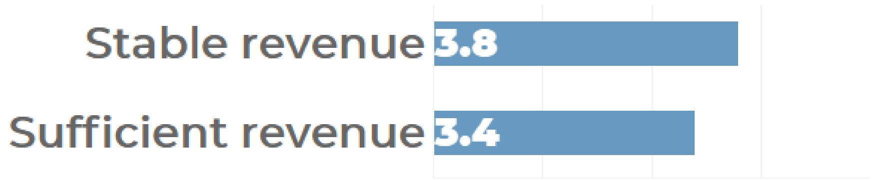
Community Alignment – Stakeholder Report Card

Variable	Perceived Performance (1-5 scale) Hattiesburg Average	DMO Board of Directors & Staff	Tourism Stakeholders	Customers	Government Leaders	Community Leaders
Funding Support & Certainty	3.6	3.1	3.6	3.2	3.9	3.6
Policy & Regulatory Environment	4.2	4.7	4.3	3.9	4.2	4.2
Industry Support	4.1	4.4	4.2	4.1	4.0	4.1
Partnership Strength	4.3	4.5	4.4	3.8	4.3	4.3
Economic Development	4.1	4.1	4.2	3.9	4.1	4.1
Hospitality Culture	4.1	4.4	4.1	2.7	4.1	4.1
Workforce	3.7	3.8	3.5	2.9	3.8	3.7
Organization Governance Model	4.1	4.8	4.1	3.7	4.1	4.1
Regional Collaboration	4.0	4.1	4.0	3.8	4.0	4.1
Local Community Support	3.8	3.9	3.9	3.0	3.8	3.8
COMMUNITY ALIGNMENT - Hattiesburg						**4.01**
INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT						**3.55**

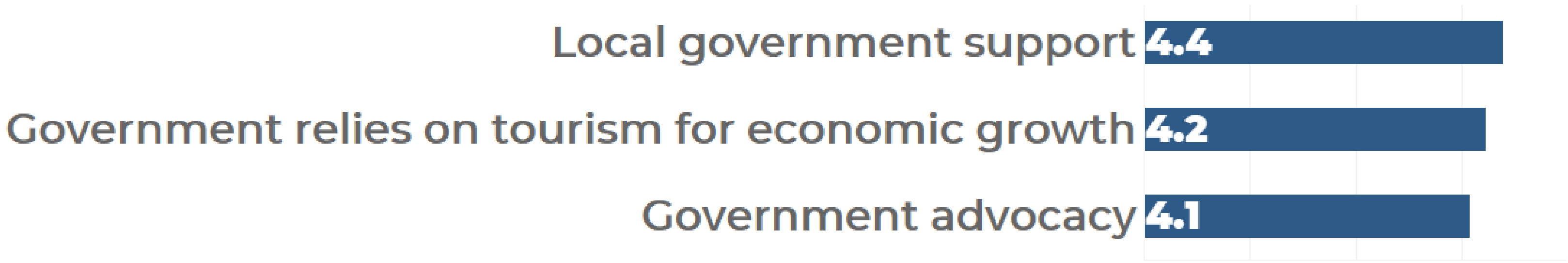
RESULTING SCENARIO **TRAILBLAZERS**

Note
Green shading signifies that the stakeholder group **outperformed** the destination average by greater than 0.2.
Yellow shading signifies that the stakeholder group **underperformed** the destination average by greater than 0.2 but less than 0.4.
Red shading signifies that the stakeholder group **underperformed** the destination average by greater than 0.4.

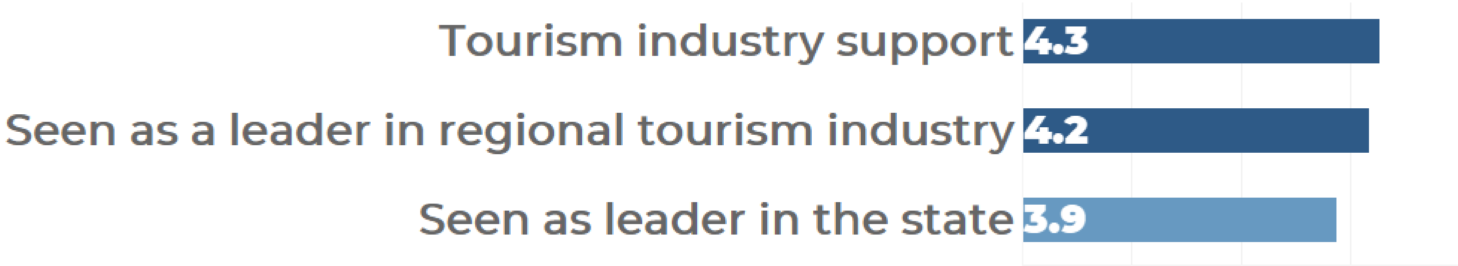
Funding Support & Certainty



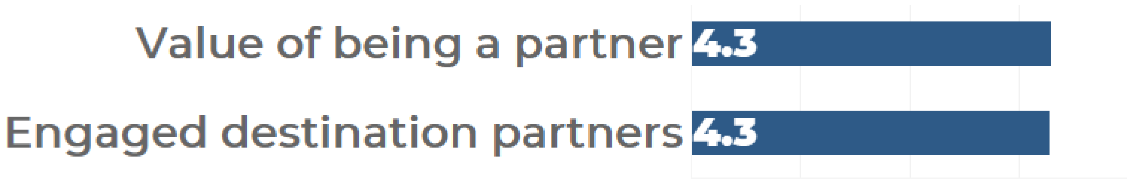
Policy & Regulatory Environment



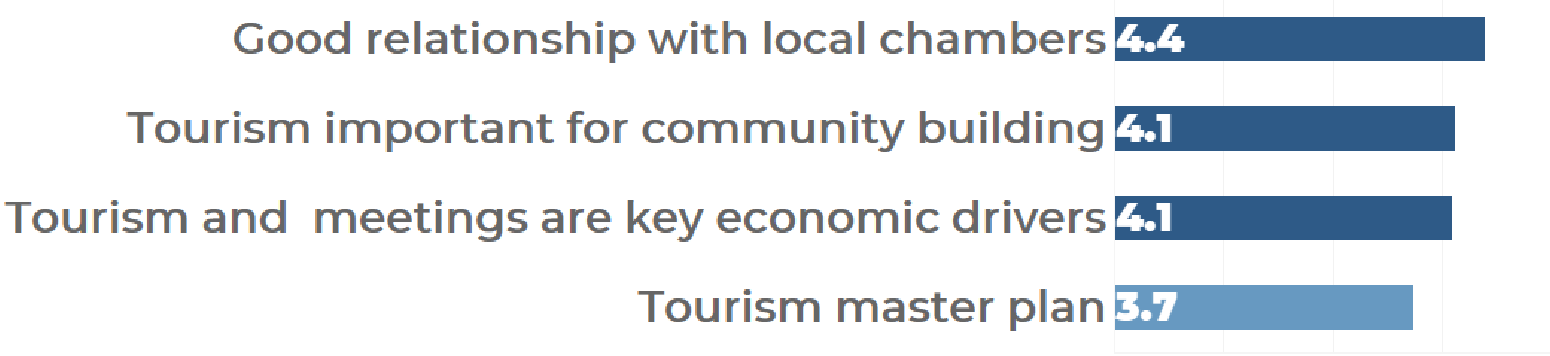
Industry Support



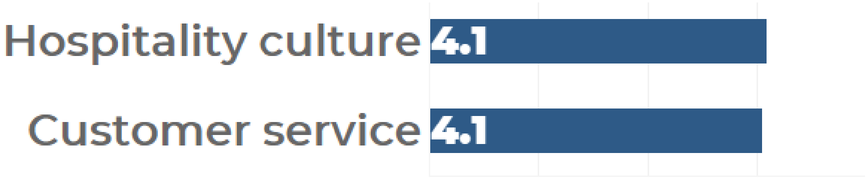
Partnership Strength



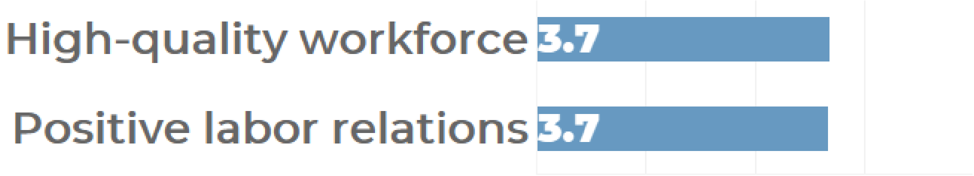
Economic Development



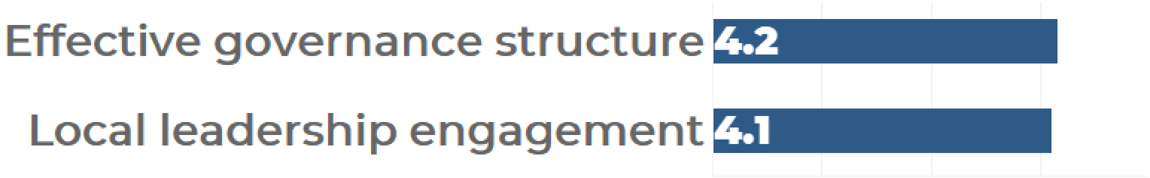
Hospitality Culture



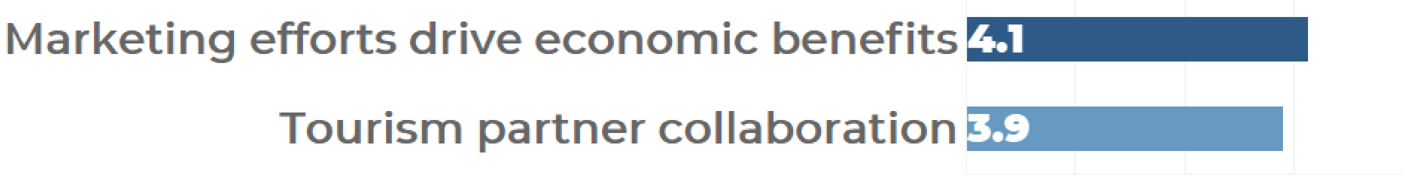
Workforce



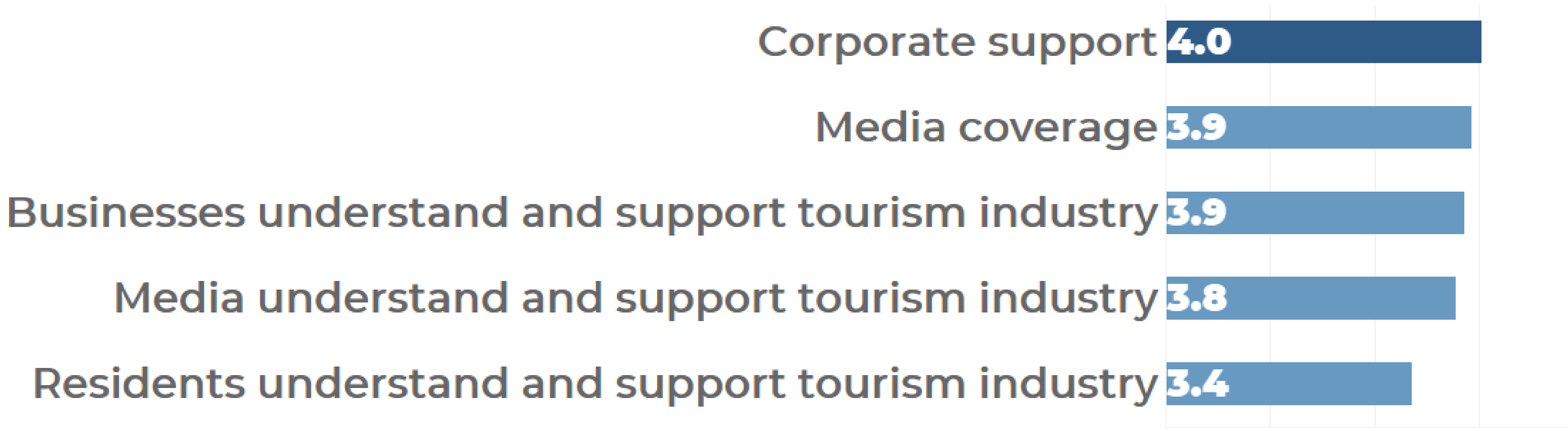
Organization Governance Model



Regional Collaboration



Local Community Support



What one thing could Hattiesburg do to become a more attractive visitor destination?

Attraction & Entertainment (45%)

- Continue to add value to its existing assets in Downtown, the Zoo, the museums, the rivers
- Continue to strengthen and revitalize downtown Hattiesburg so it is better positioned to attract destination tourists and heritage tourists
- Featured attraction that is different than the rest of the state: amusement parks, theatre/music/club district
- Have a shopping mall outlet, stadium to support outside events
- Have more businesses opened in abandon buildings in downtown area. Maybe think of having more attractions in empty areas
- If there more attractions for families and the younger generation to do for fun
- Increase attractions and meeting opportunities

Access & Mobility (10%)

- Better connection between the universities and the city
- Better parking downtown and more big concerts
- Improve the connecting streets curb appeal for Hardy and 4th Street from USM to downtown
- Improving the ease of transportation, including cycling and walkability
- Relocate train traffic downtown
- To make Hattiesburg a walk-able city or biking lanes, better transportation for visitors and more attractions concerts or larger events
- Walkability, improvements in traffic

Convention & Meeting Facility (8%)

- An arena venue that attracts concerts to Hattiesburg
- Larger music/performing arts venue
- More event space for local artists and events
- Outdoor music venue (amphitheater)
- Work with the Convention Commission on common goals for meetings and conventions to create a competitive advantage for large groups

Are there any markets we are currently not capitalizing on?

- We are a medical and military center for the state, and we need to attract more of the technological industries that support these two industries. And those we bring in need to be top notch, not halfway, but excellent world leading innovators - I know this may be ambitious and impractical, but we have a "no" in our hand, what does it hurt to ask
- I think Laurel is beating us in the downtown revitalization. They are getting a huge boost from the HGTV show, I think we could get our downtown to a place where we might be another stop for those tours buses/tourists
- I would say in the downtown area
- Large meetings/conventions 500+ Large outdoor concert / music events 5,000+ Shuttle system for hotels to meeting facilities
- Local Access Television/Social Media Advertising that would serve as a community bulletin board listing events, destinations (African-Amer Military History Museum) and restaurants
- Mississippi Gulf Coast/Picayune
- More vegetarian restaurants options
- Out west
- Outdoors area; the Hub City is within driving distance of tons of hunting & fishing locations. Could be a unique draw for the Convention Center
- Pairing food trucks or other mobile eating options with public spaces
- Recreation/Entertainment. Hattiesburg would do well with a Go-cart, bumper boat, putt-putt golf type of establishment. We have not had anything like that in years, and it would go a long way in providing more entertainment opportunities for citizens. Also, an outdoor concert venue (amphitheater).
- Senior visitors
- Sports
- Talent and University students and University activities.
- The military museum at Camp Shelby is incredible and I personally feel that most people don't even know about it, therefore I think this could be capitalized on more heavily

Are there certain issues that Visit Hattiesburg (CVB) should specifically address?

Marketing (18%)

- Cross-publicity among organizations
- Growing its advertising and marketing budget to better serve the size of the market
- Better marketing/community engagement and branding would be helpful
- Lack of marketing about the town and a better hook then the town being a certified retirement city
- Not enough people know exactly who Visit Hattiesburg is. Who works for them? What do they do for the community? What events do they put on? Who do they partner with?
- There are some great things here-like Live at Five- but even a lot of the locals don't know about it. Getting word out about f the events we already have would be a good start

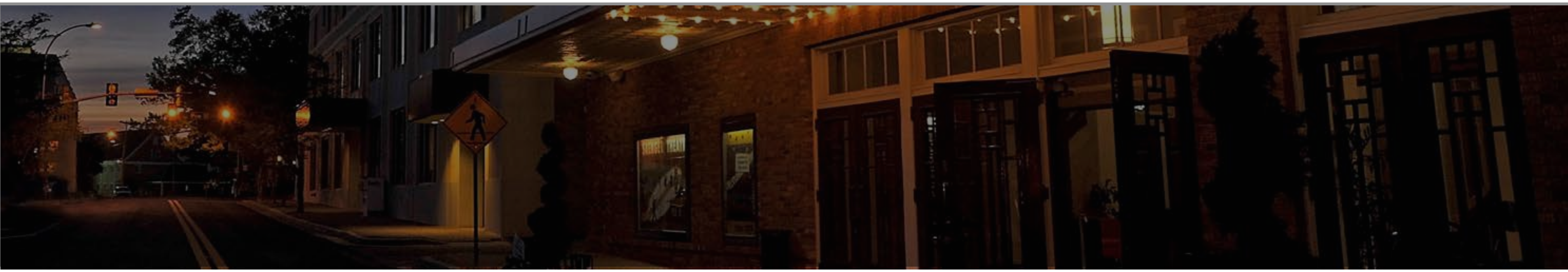
Partnership Strength & Support (18%)

- Doing a fantastic job now, and in the future can help develop partnerships to bring about more parks and recreation opportunities that are attractive to tourists, leveraging connection to the Longleaf Trace
- Encourage the city and the universities to work together on creating a year-round arts destination brand
- Engaging all groups in decision making
- There is a disconnect between Visit Hattiesburg and Lake Terrace Convention Center. The CVB has tried to bridge that gap with no cooperation from the convention center
- We need to be more unified as a community in our efforts to develop and attract business to our community. There have been too many "kingdoms" with too much self interest and too little cooperation

Attraction & Entertainment (15%)

- Artistic opportunities and live entertainment
- Attracting activities for the young/teen urban market
- Beautification at entry ways
- Festival downtown
- Support of the arts

Key Takeaways



Destination Strength – Opportunities for Improvement

- Shopping downtown
- Iconic attractions
- High-tech and innovative
- Convention center events
- Mobility & Access
- Professional sporting facilities
- Public Wi-Fi
- Air Access

Community Support & Engagement - Opportunities for Improvement

- Revenue sources
- Local resident support
- Workforce

VISIT HATTIESBURG

Research Findings & Recommendations

Summary & Observations:

- The Hattiesburg hotel inventory has experienced dramatic growth in the last five years (1/3 of the 2019 inventory).
- Demand for rooms has not increased significantly with the market average occupancy hovering in the 57% range. Nightly hotel occupancy remains below 60% two-thirds of the year with the summer months typically exceeding the 60% mark.
- Weekend hotel occupancy significantly outpaces weekdays. Many of the weekend stays are one-nights driven by those passing through the area.
- The best opportunity for growth in visitation is on weekdays throughout the year. Weekday growth will come from group sales and leisure promotion to those who can travel on weekdays.
- Travelers to Hattiesburg enjoy unique dining, shopping and driving/site-seeing while in the area.
- The visitor research data reveals high visit satisfaction with adequate spending with those who are visiting the Hattiesburg area. However, there is an opportunity to drive increased engagement with unique activities in the area.
- The DestinationNEXT survey of leaders revealed a very high level of satisfaction with Hattiesburg while acknowledging that Hattiesburg has work to do at becoming a competitive weekend getaway destination. Many components are in place and a few more pieces will complete the puzzle. Connecting visitors to the downtown area that is animated and active as a destination will make the biggest impact. Unique shopping in a vibrant, walkable/bikeable town is a worthy vision.

Action Items

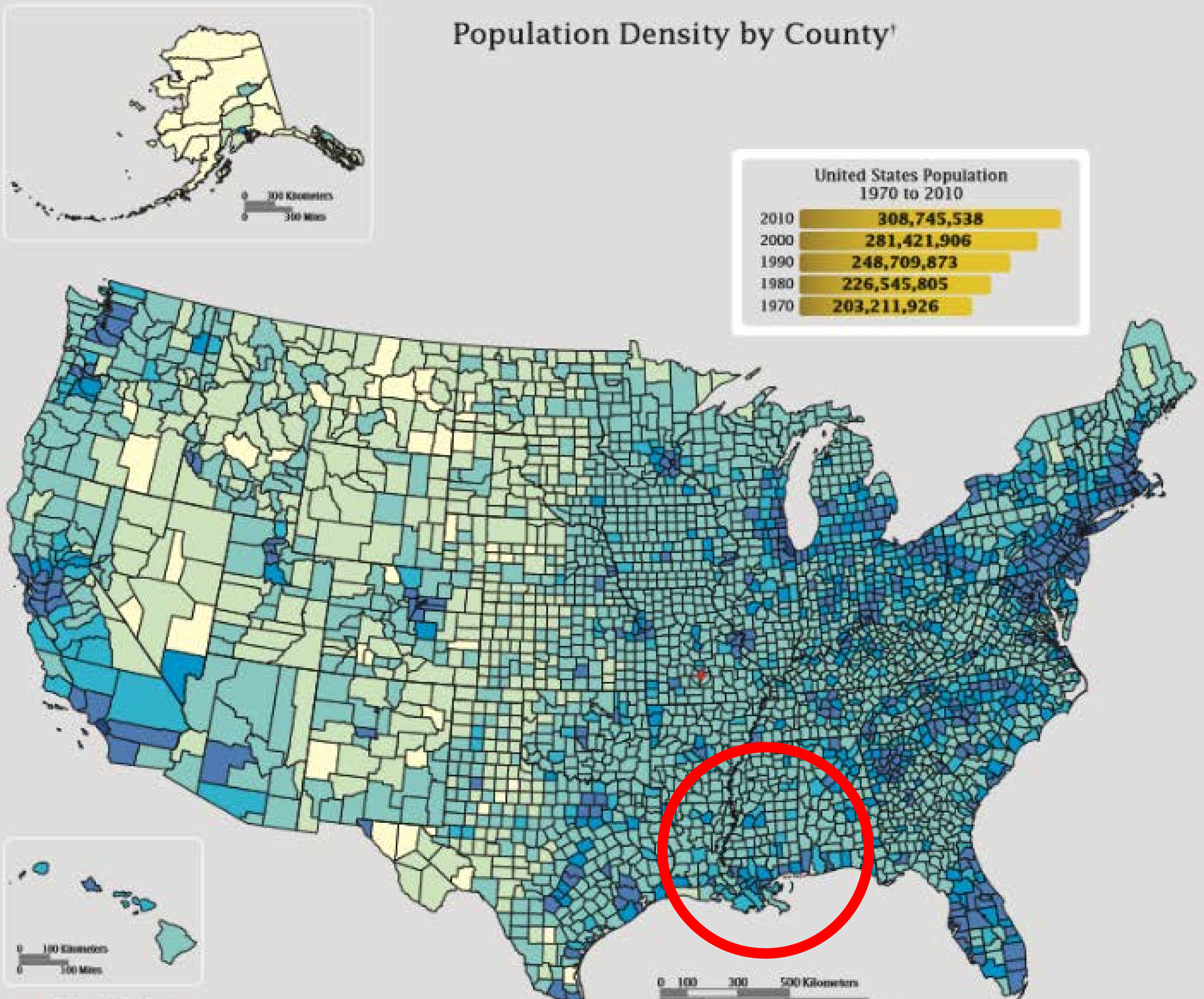
The following opportunities were identified in preliminary reviews of the research data.

- Weekday strategy, increased group sales, advertising, medical and PR to drive visitation.
- Weekend team sports strategy.
- Partnership and cooperation between Visit Hattiesburg and Convention Center is critical to success.
- Demand generation = create events and reasons to visit, partner with hotels and attractions to drive longer stays
- Conference/meetings market
- SMERF markets
- Active outdoors engagement – trails and creeks year round activities
- Active evenings drive overnight stays, something to do from 5-9 PM (the magic hours)
- Build awareness of Hattiesburg as a food destination

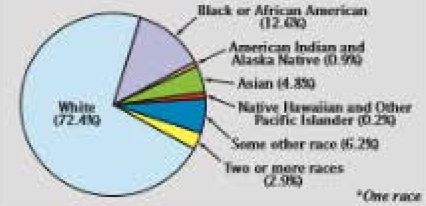

HILLS
DELTA
PINES
CAPITAL/
RIVER
COASTAL
COVINGTON COUNTY
Jones County
MISSISSIPPI
The New State of JONES
HBURG
JEFFERSON DAVIS COUNTY
ECONOMIC DEVELOPMENT DISTRICT
GATEWAY TO THE LONGLEAF TRACE
Marion County
MISSISSIPPI
BUILT FROM THE PAST
READY FOR THE FUTURE
GEORGE COUNTY
MISSISSIPPI
Intermodal & Tourist Center
City of Picayune
STONE COUNTY
DIVISION OF TOURISM
Coastal Mississippi
Come Play on the Bay
Hancock Tourism
BAY ST. LOUIS • DIAMONDHEAD • WAVELAND
Harrison county
MISSISSIPPI
JACKSON
COUNTY
MISSISSIPPI

2010 Census: United States Profile

Population Density by County†



U.S. Race* Breakdown

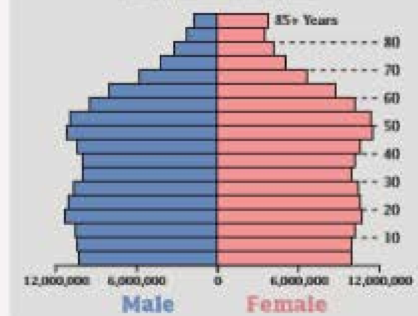


*One race

Hispanic or Latino (of any race) makes up **16.3%** of the U.S. population.

Population by Sex and Age

Total Population: 308,745,538



Housing Tenure

Total Occupied Housing Units:
116,716,292

65.1% Owner Occupied	34.9% Renter Occupied

Average Household Size of Owner-Occupied Units: 2.65 people

Average Household Size of Renter-Occupied Units: 2.44 people

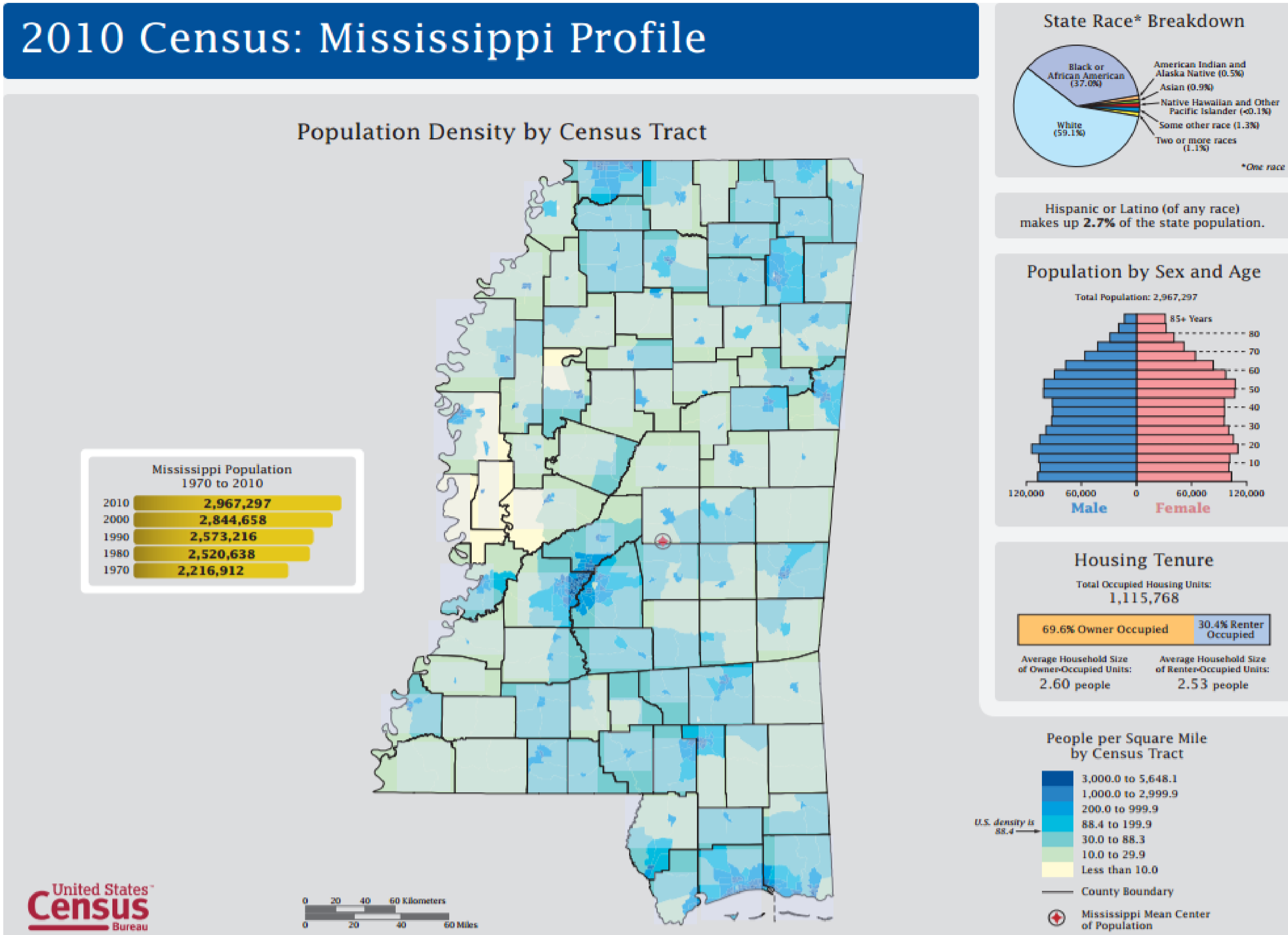
People per Square Mile by County†

- 3,000.0 to 69,468.4
- 300.0 to 2,999.9
- 160.0 to 299.9
- 88.4 to 159.9
- 7.0 to 88.3
- 1.0 to 6.9
- Less than 1.0
- State Boundary
- County† Boundary
- United States Mean Center of Population

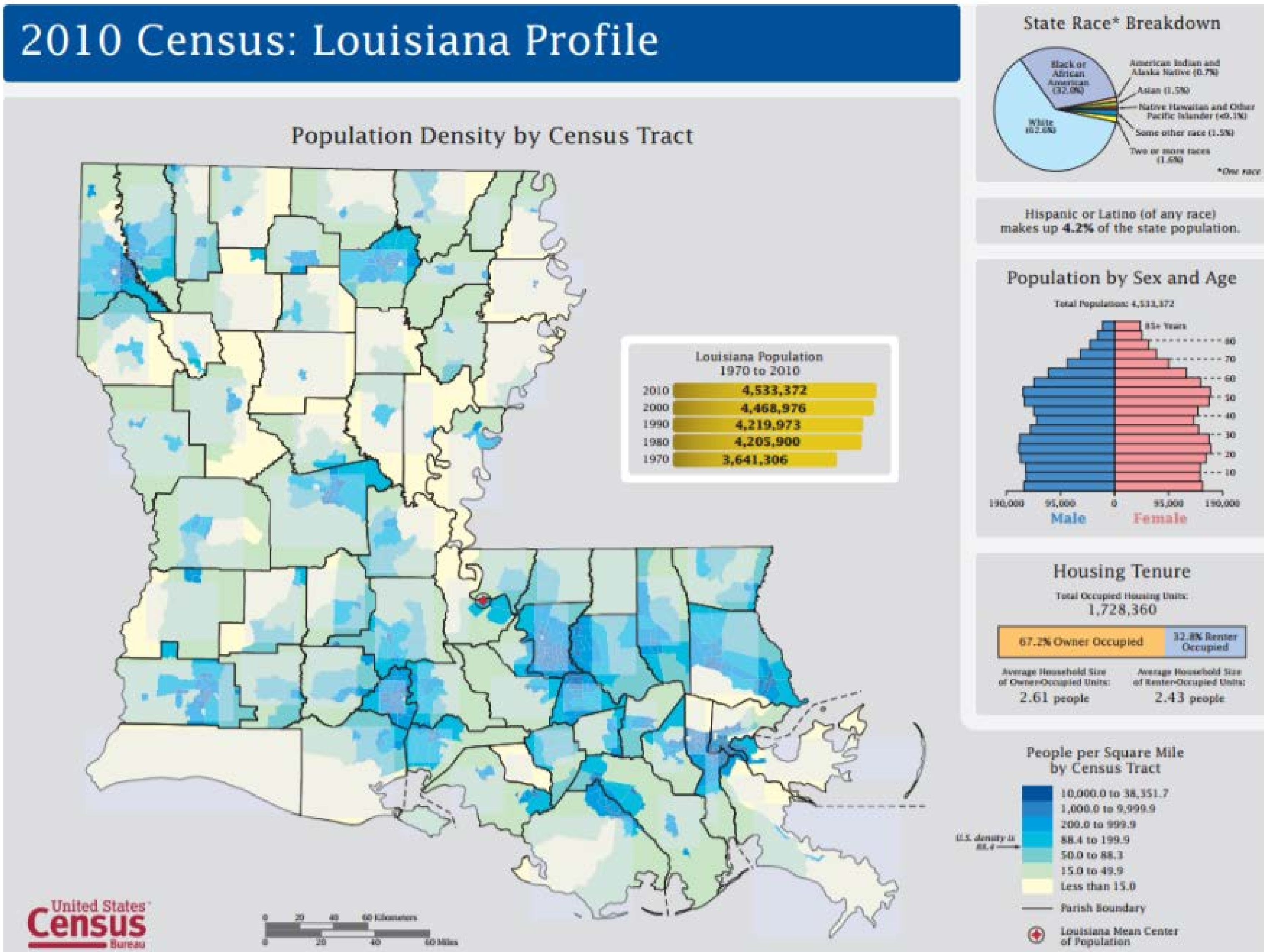
U.S. density is 88.4

†*County and statistically equivalent entity*

United States Census Bureau



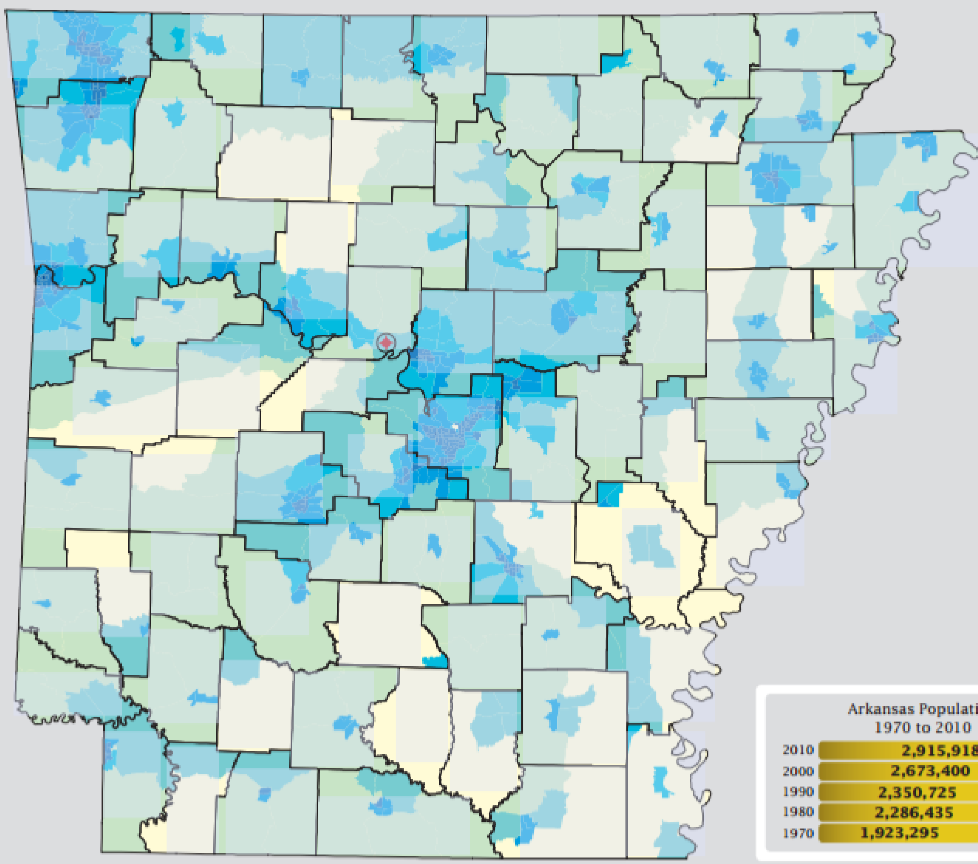
U.S. Department of Commerce Economics and Statistics Administration U.S. CENSUS BUREAU



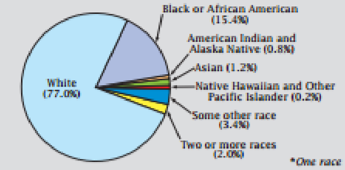
U.S. Department of Commerce Economics and Statistics Administration U.S. CENSUS BUREAU

2010 Census: Arkansas Profile

Population Density by Census Tract



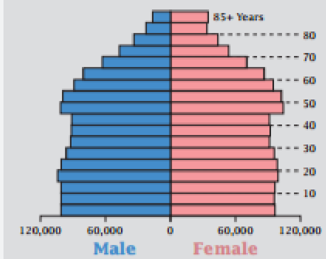
State Race* Breakdown



Hispanic or Latino (of any race) makes up **6.4%** of the state population.

Population by Sex and Age

Total Population: 2,915,918



Housing Tenure

Total Occupied Housing Units:
1,147,084

67.0% Owner Occupied	33.0% Renter Occupied
Average Household Size of Owner-Occupied Units: 2.51 people	Average Household Size of Renter-Occupied Units: 2.40 people

Arkansas Population 1970 to 2010

2010	2,915,918
2000	2,673,400
1990	2,350,725
1980	2,286,435
1970	1,923,295

People per Square Mile by Census Tract

- 5,000.0 to 7,426.8
- 1,000.0 to 4,999.9
- 200.0 to 999.9
- 88.4 to 199.9
- 30.0 to 88.3
- 10.0 to 29.9
- Less than 10.0

U.S. density is 88.4

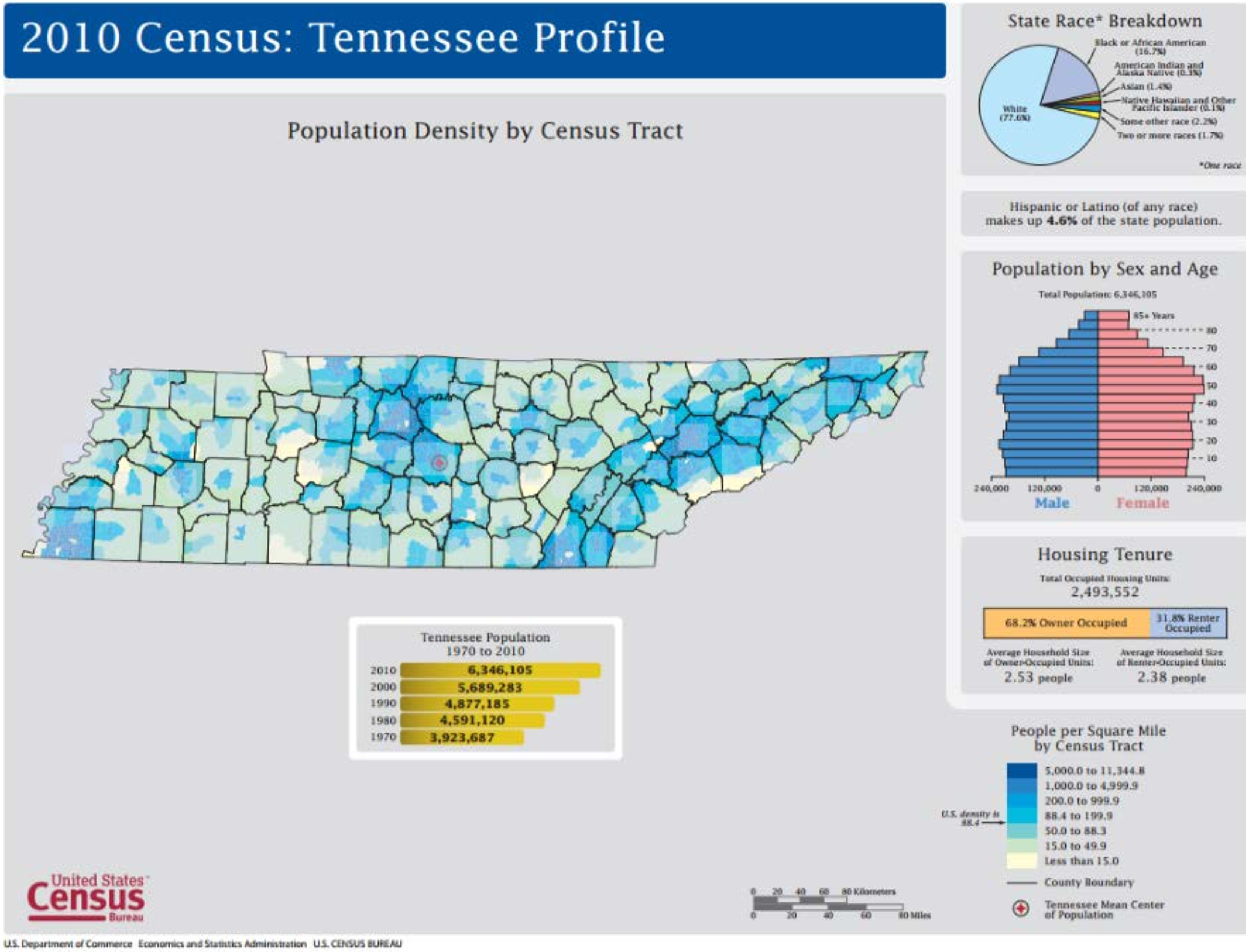
County Boundary

Arkansas Mean Center of Population

0 10 20 40 60 Kilometers
0 10 20 40 60 Miles

United States Census Bureau

U.S. Department of Commerce Economics and Statistics Administration U.S. CENSUS BUREAU

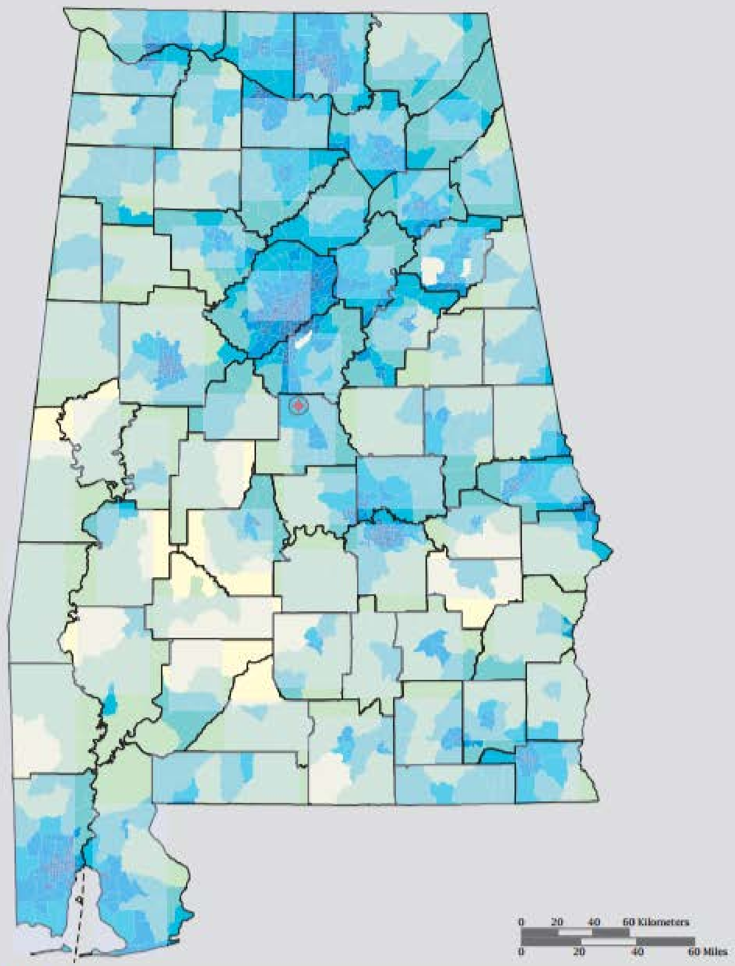

2010 Census: Tennessee Profile
Population Density by Census Tract
Tennessee Population 1970 to 2010
2010 6,346,105
2000 5,689,283
1990 4,877,185
1980 4,591,120
1970 3,923,687
State Race* Breakdown
Black or African American (16.7%)
American Indian and Alaska Native (0.3%)
Asian (1.4%)
Native Hawaiian and Other Pacific Islander (0.1%)
Some other race (2.2%)
Two or more races (1.7%)
White (77.6%)
*One race
Hispanic or Latino (of any race) makes up 4.6% of the state population.
Population by Sex and Age
Total Population: 6,346,105
85+ Years
240,000 120,000 0 120,000 240,000
Male Female
Housing Tenure
Total Occupied Housing Units:
2,493,552
68.2% Owner Occupied
31.8% Renter Occupied
Average Household Size of Owner-Occupied Units: 2.53 people
Average Household Size of Renter-Occupied Units: 2.38 people
People per Square Mile by Census Tract
5,000.0 to 11,344.8
1,000.0 to 4,999.9
200.0 to 999.9
88.4 to 199.9
50.0 to 88.3
15.0 to 49.9
Less than 15.0
U.S. density is 88.4
County Boundary
Tennessee Mean Center of Population
0 20 40 60 80 Kilometers
0 20 40 60 80 Miles
United States Census Bureau
U.S. Department of Commerce Economics and Statistics Administration U.S. CENSUS BUREAU

2010 Census: Alabama Profile

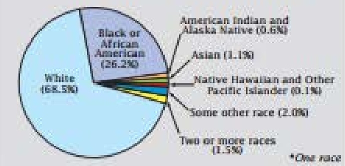
Population Density by Census Tract

Alabama Population
1970 to 2010

2010	4,779,736
2000	4,447,100
1990	4,040,587
1980	3,893,888
1970	3,444,165



State Race* Breakdown

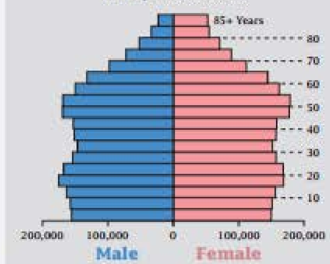


*One race

Hispanic or Latino (of any race) makes up **3.9%** of the state population.

Population by Sex and Age

Total Population: 4,779,736



Housing Tenure

Total Occupied Housing Units:
1,883,791

69.7% Owner Occupied | 30.3% Renter Occupied

Average Household Size of Owner-Occupied Units: 2.52 people

Average Household Size of Renter-Occupied Units: 2.37 people

People per Square Mile by Census Tract

- 5,000.0 to 12,107.6
- 1,000.0 to 4,999.9
- 200.0 to 999.9
- 88.4 to 199.9
- 30.0 to 88.3
- 10.0 to 29.9
- Less than 10.0

U.S. density is 88.4

County Boundary

Alabama Mean Center of Population

United States Census Bureau

- 123 -

Young Strategies, Inc.
Research Team Experience

Young Strategies, Inc. (YSI) is a research and planning firm focusing on destination marketing organizations and travel destinations. The principal members of this project team have conducted research and strategic planning with over 150 DMOs in thirty-two states. YSI's approach is to custom tailor each research study to the specific needs of the destination. The final report will be an easy to read document that presents the customer-focused data with recommendations for action. YSI is a small boutique firm that develops a close bond with our clients who are devoted to our process that delivers clear actionable strategies for future growth. The project team's hands-on experience includes CVB/DMO management, hotel/resort management and rural tourism development.

Berkeley W. Young, President - Project Team Leader

20 years of travel/tourism marketing and management experience including destination marketing and hotel management. Young's experience includes serving as the Executive Director of a start-up convention and visitors bureau and chamber of commerce in which he oversaw the creation and success of a research-based tourism marketing program for a rural county in the mountains of North Carolina. Then, Young was hired as Director of Sales and quickly promoted to General Manager of a large golf resort managed by Interstate Hotels Corporation. Young joined Randall Travel Marketing in 1998 as Vice President conducting research for DMOs throughout the United States. He opened Young Strategies in November 2004 focusing on strategic planning and research for destination marketing organizations.

Amy Stevens, Vice President - Lodging Market Analysis, Research Coordination

15 years of travel, tourism and marketing experience. As Vice President/Research Director, Stevens is responsible for writing surveys, conducting research, analyzing data and writing reports for Young Strategies. Stevens worked with Randall Travel Marketing prior to working for Young Strategies. Stevens also worked with Navigant International, the second largest travel management company in the United States, and was responsible for sales, business travel accounts, training and development and conflict resolution. She handled written and multi-media presentations and developed marketing materials and programs to increase both leisure and corporate business travel.

Larry Gustke, PhD - Destination Analytics - Oversight of Research Process and Validation

Over 30 years' experience in conducting research on outdoor recreation, tourist behavior and tourism marketing. Dr. Gustke has conducted research in over 30 U.S. states and internationally. Dr. Gustke has also conducted extensive research among outdoor dramas in North America. As professor emeritus, NC State University, Dr. Gustke has designed the research methodology proposed in this study based on his years of experience. He received his Ph.D. from Texas A&M, and is considered one of the most accomplished tourism researchers in the field today. Dr. Gustke is active in the Travel and Tourism Research Association (TTRA), and in many other academic and professional networks related to tourism research. Dr. Gustke is a founding partner of Destination Analytics.

McKenzie Graham, Office Manager & Research Coordinator- Data Tabulation and Analysis

A University of South Carolina graduate, McKenzie has been with Young Strategies for the last 5 years as Office Manager and Research Coordinator. McKenzie's role on the team is to work closely with constituents within the destination to collect data, monitor research return rates and data accuracy as well as assist in the compilation of final report data and report development.

Madelyn Matlock, Research Analyst

A University of North Carolina Wilmington graduate, Madelyn has been with Young Strategies for the last 4 years as a Research Coordinator and Analyst. Madelyn specializes in survey instrument development, data collection, lodging data analysis and report development.

VISIT HATTIESBURG Digital Marketing Assessment

Completed by Entrada Insights

HBURG

entrada insights

Hattiesburg, MS

Strategic Analysis

2018-19

Methodology:

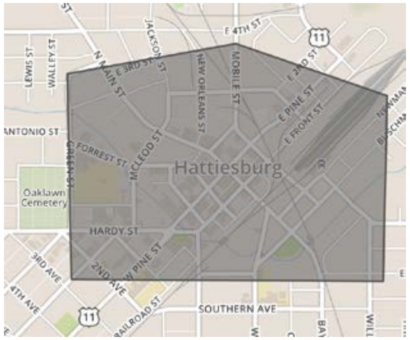
Datasets

- UberMedia - Anonymized cell phone location information
- Smith Travel Research (STR) - Benchmark hotel performance
- Google Analytics - Website visitation

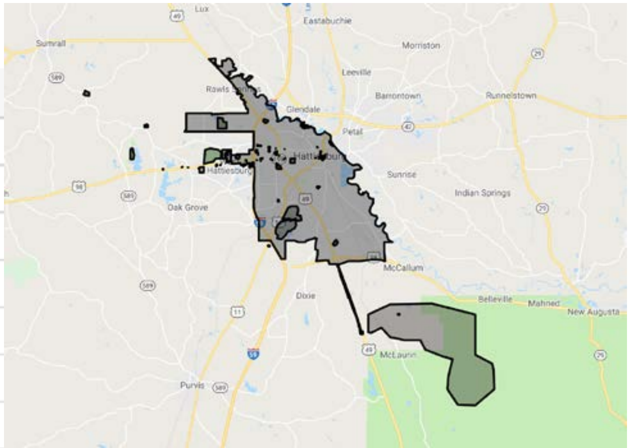
UberMedia

Study period - June 1, 2018 - June 1, 2019

- 172,134,232 location observations within Hattiesburg & designated Points of interest
- 456,627 devices observed in 1,441,189 ‘trips’ (excludes Hattiesburg residents)
- Trip type
  - Overnight - observed in market on two consecutive days
  - Daytrip - observed in market on a single, non-consecutive day
- Alignment with survey methodology
  - Visitors from zip codes within Forrest, Perry and Lamar were excluded to provide better alignment with hotel survey
- All market analysis is on “overnight” visitors from non-local origin markets unless otherwise noted

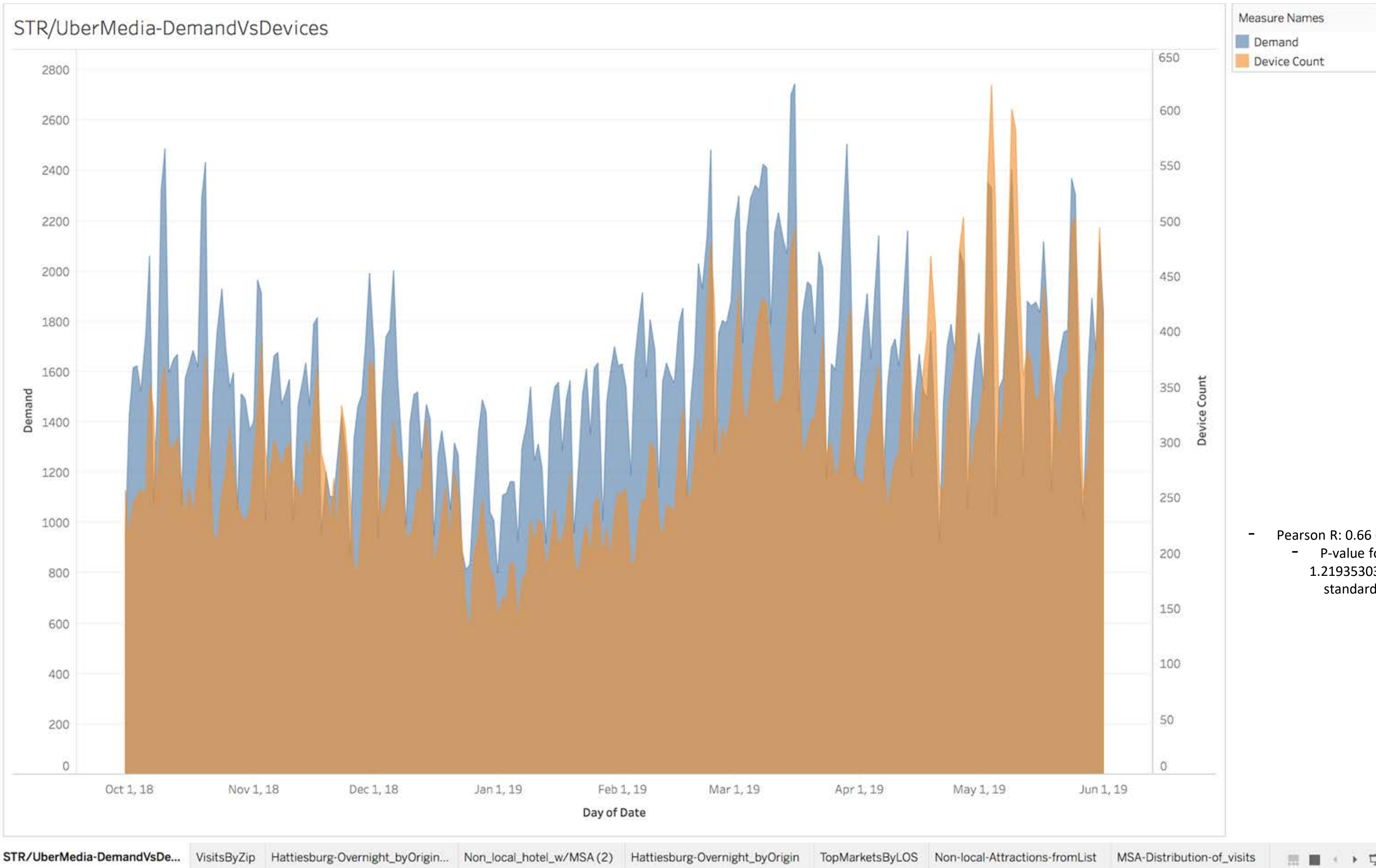


Lat_of_Visit	Lon_of_Visit	Unix_Timestamp_of_Visit	Date	Time_of_Day	Day_of_Week	Time_Zone	POI
31.275219	-89.323598	2018-11-30 08:32:11 UTC	2018-11-30	02:32:11	Fri	America/Chicago	Timberton_Golf_Club
31.27518	-89.32372	2018-11-30 12:37:33 UTC	2018-11-30	06:37:33	Fri	America/Chicago	Timberton_Golf_Club
31.275219	-89.3236	2018-11-30 13:08:47 UTC	2018-11-30	07:08:47	Fri	America/Chicago	Timberton_Golf_Club
31.27518	-89.323746	2018-11-30 14:07:57 UTC	2018-11-30	08:07:57	Fri	America/Chicago	Timberton_Golf_Club
31.275353	-89.323083	2018-11-30 19:52:09 UTC	2018-11-30	13:52:09	Fri	America/Chicago	Timberton_Golf_Club
31.275345	-89.32312	2018-11-30 19:52:16 UTC	2018-11-30	13:52:16	Fri	America/Chicago	Timberton_Golf_Club
31.27061	-89.32681	2018-11-30 11:45:12 UTC	2018-11-30	05:45:12	Fri	America/Chicago	Timberton_Golf_Club
31.27061	-89.32681	2018-11-30 11:45:28 UTC	2018-11-30	05:45:28	Fri	America/Chicago	Timberton_Golf_Club



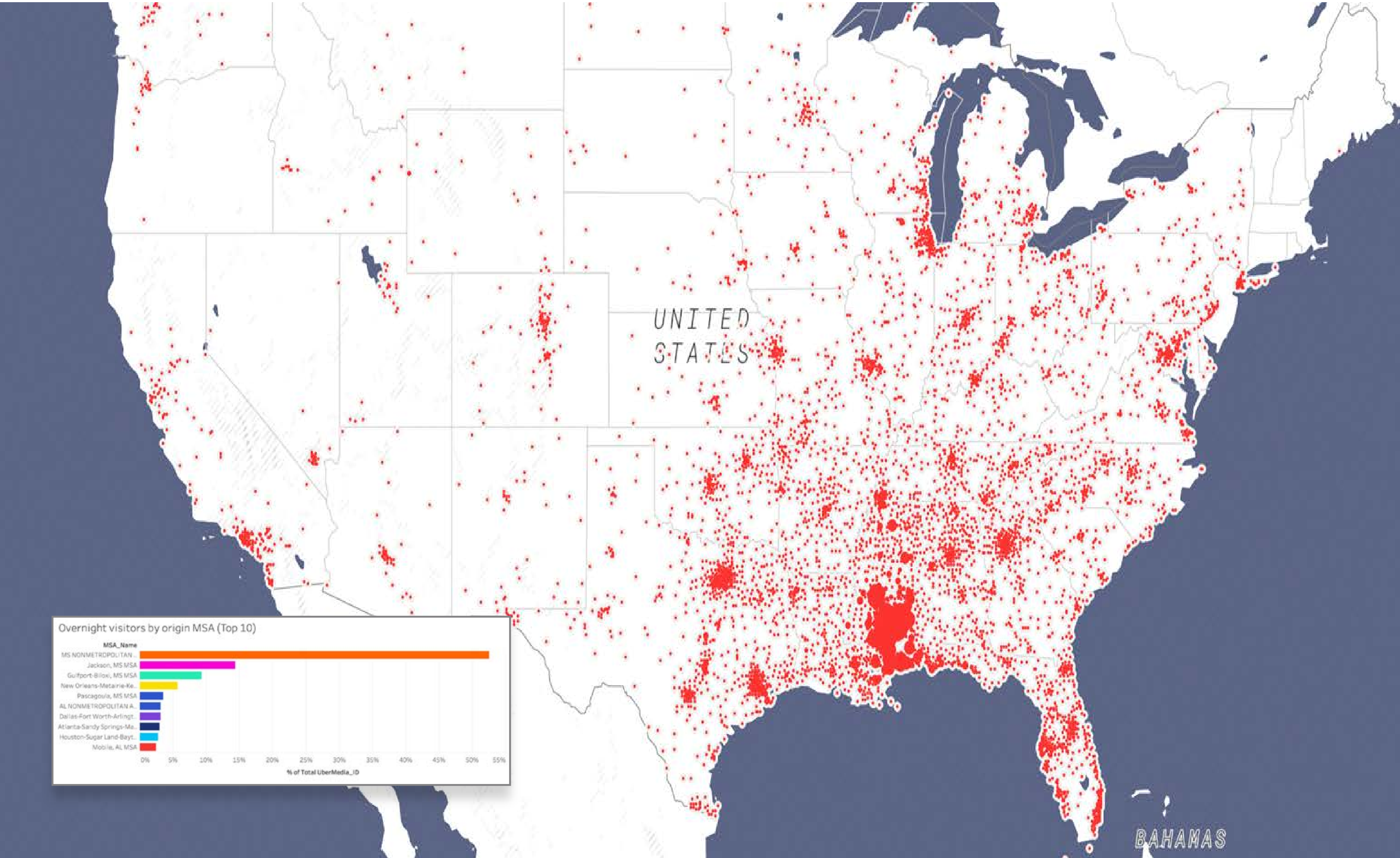
UberMedia

Benchmark against Smith Travel Report Demand (09-30-2018/06-01-19)

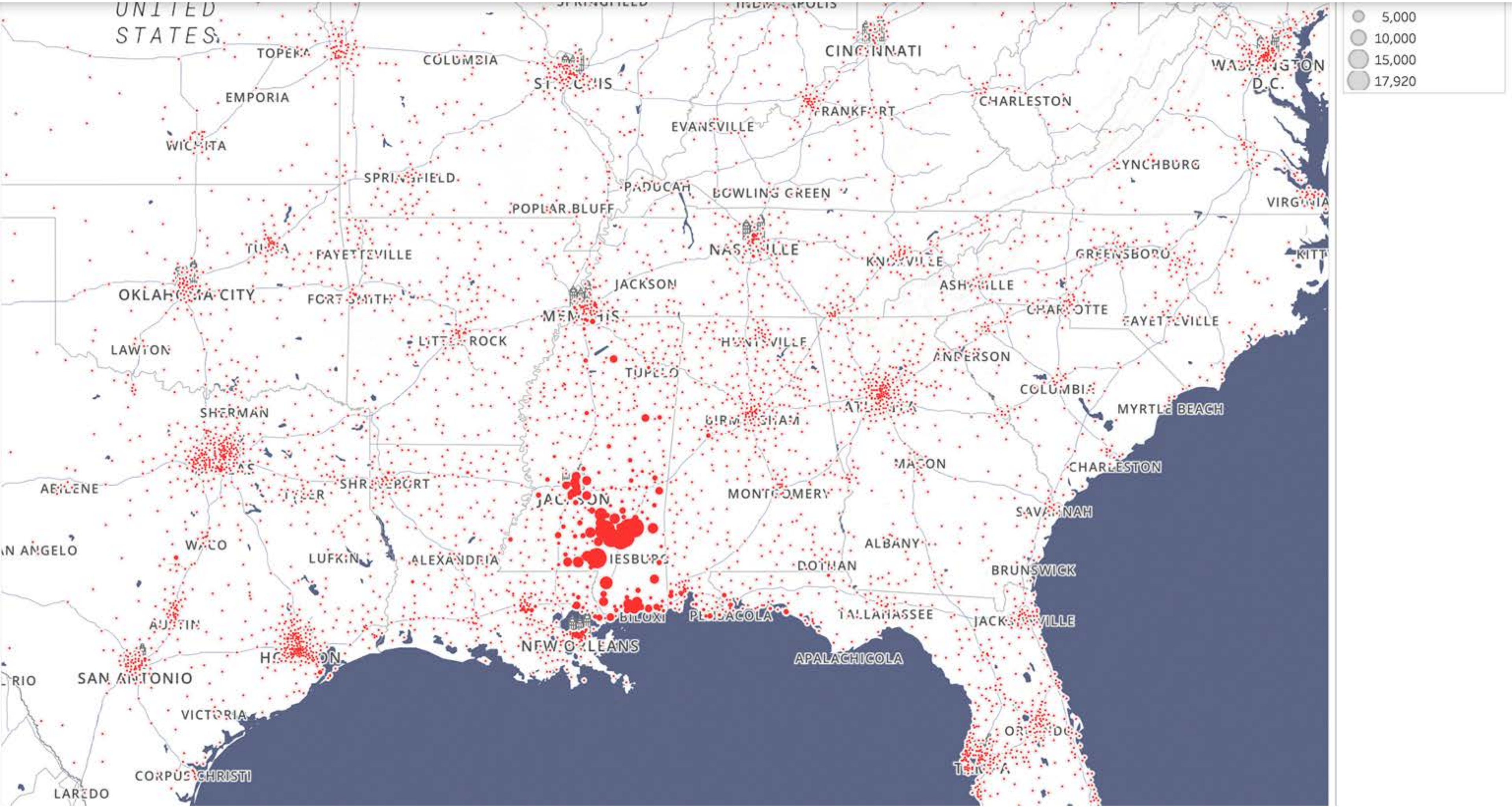


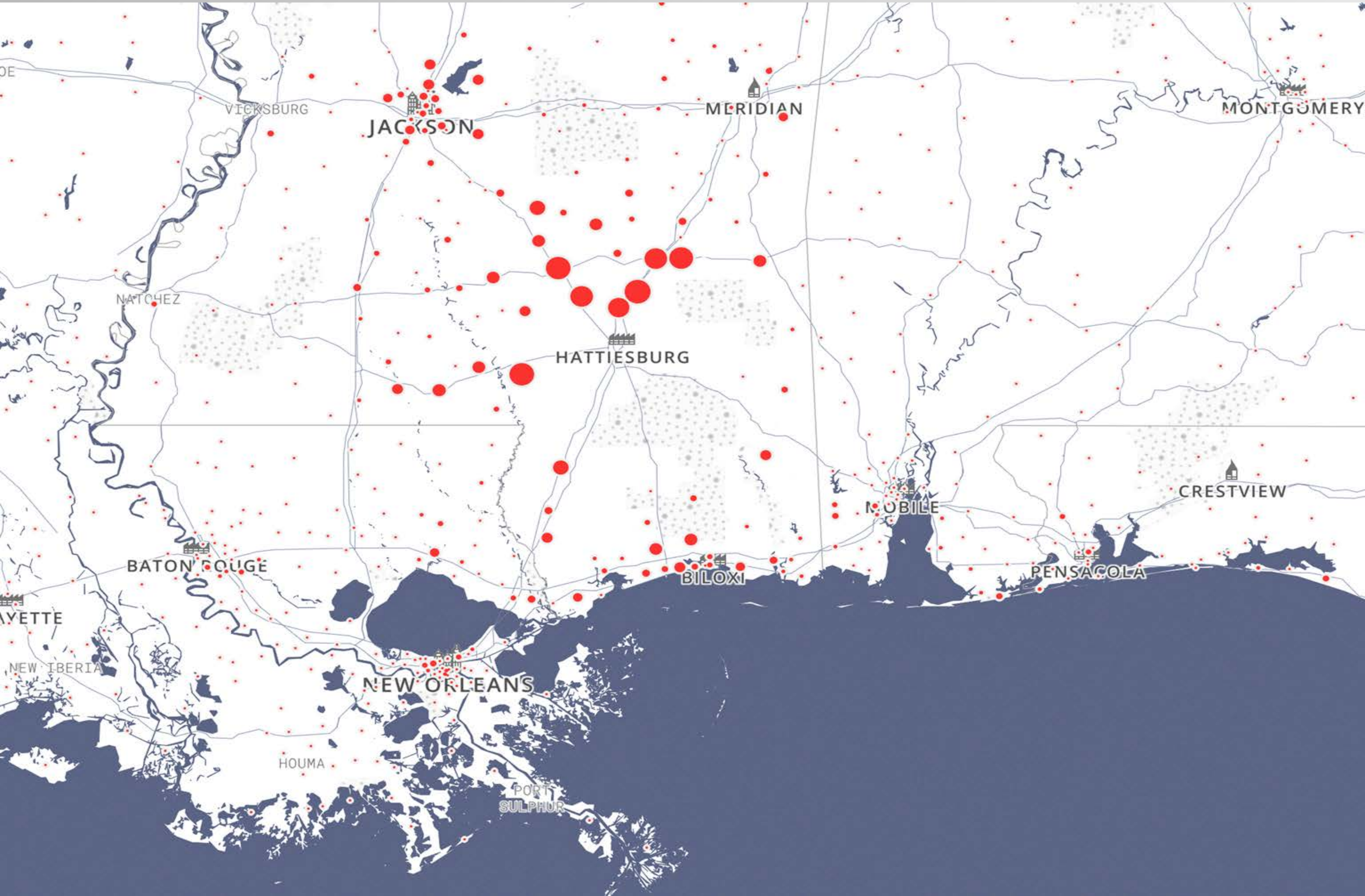
- Pearson R: 0.66 (1 is perfect correlation)
  - P-value for statistical significance 1.2193530394943344e-196 (0.05 is standard threshold for statistical significance)

Origin Locations

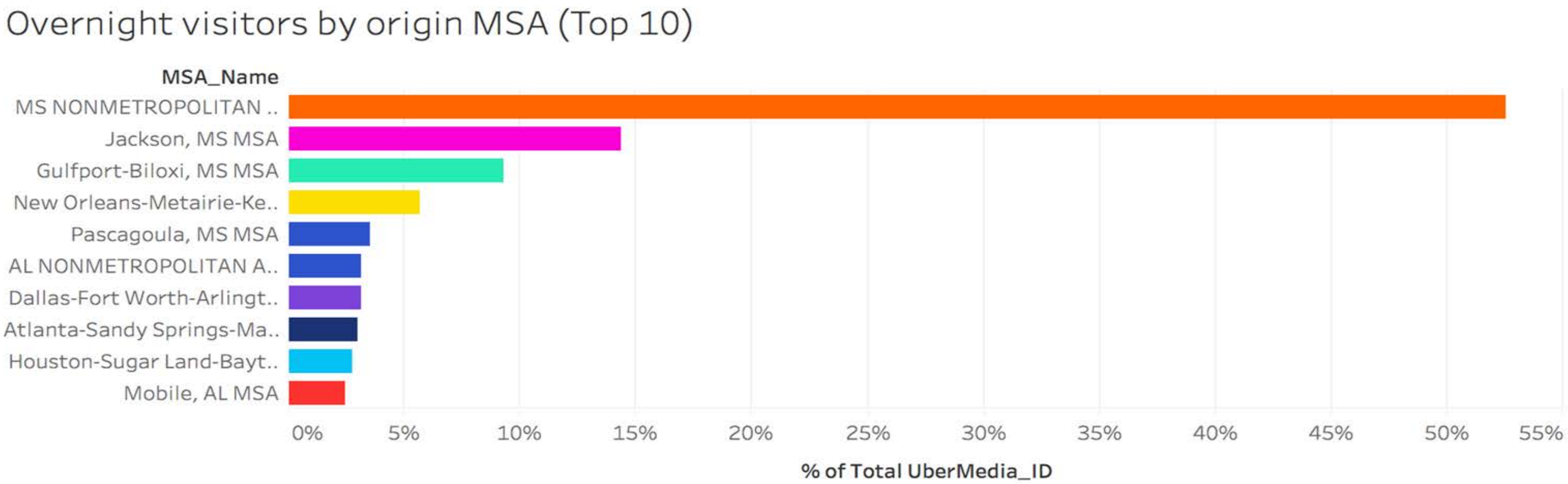


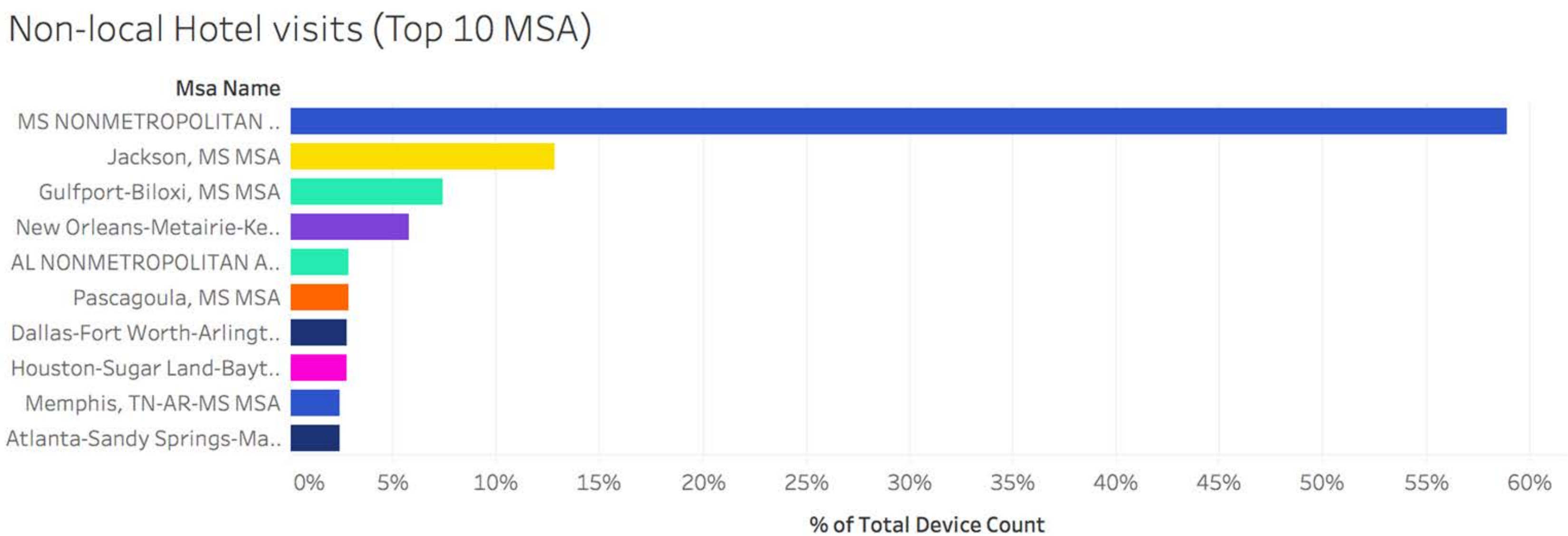
Origin Locations




VICKSBURG
JACKSON
MERIDIAN
MONTGOMERY
NATCHEZ
HATTIESBURG
CRESTVIEW
MOBILE
BATON ROUGE
BILOXI
PENSACOLA
NEW IBERIA
NEW ORLEANS
HOUMA
PORT SULPHUR

Origin Locations





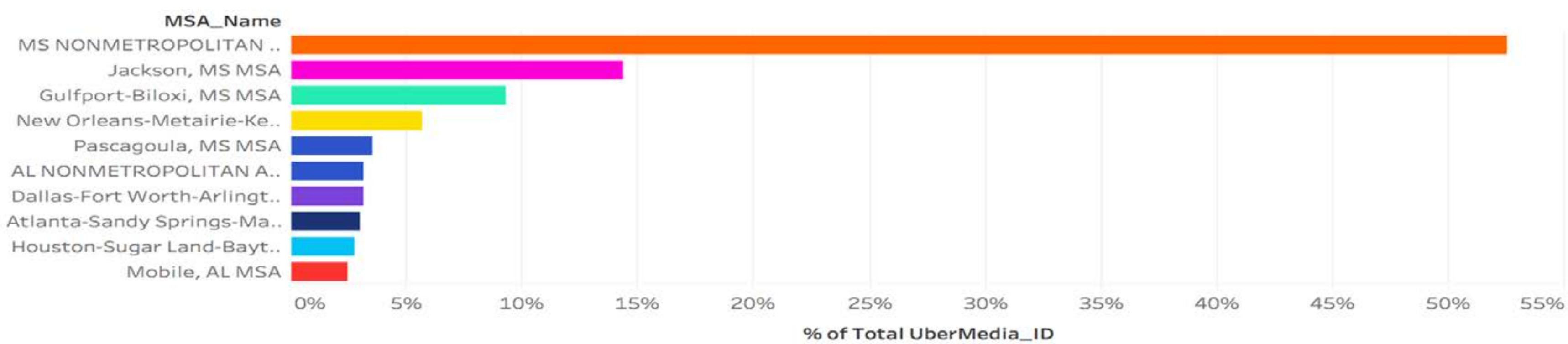
Observation #1

Regional visitation is the backbone of today’s visitor economy. Cultivating select markets will be key for future growth.

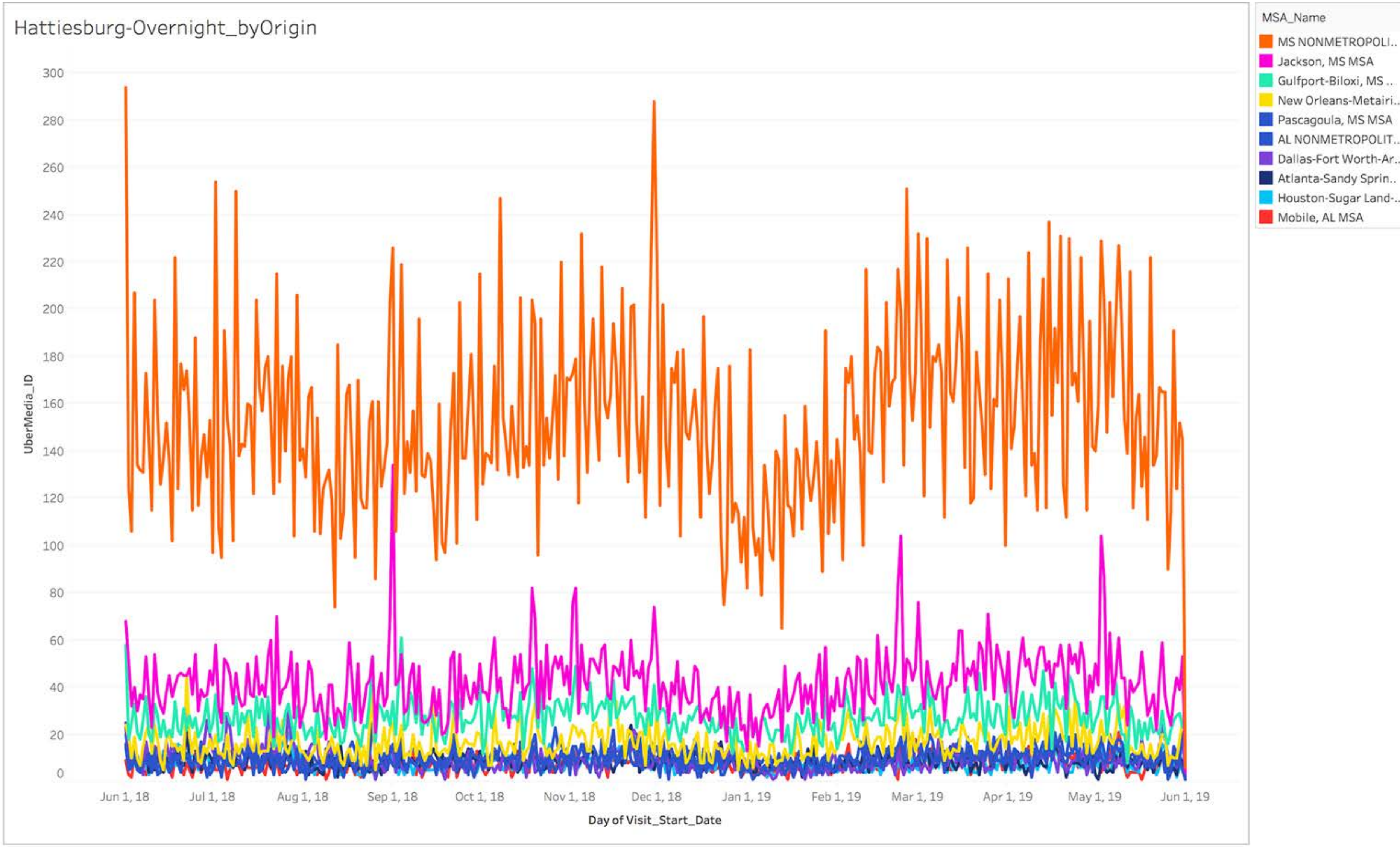
Origin Locations

	Metro	Acquisition: Users	Acquisition: New Users	Acquisition: Sessions	Behavior: Bounce Rate	Behavior: Pages / Session	Behavior: Avg. Session Duration
		24,588 % of Total: 40.27% (61,063)	24,055 % of Total: 39.68% (60,625)	47,718 % of Total: 44.08% (108,265)	63.48% Avg for View: 75.24% (-15.63%)	2.96 Avg for View: 2.16 (36.96%)	00:02:26 Avg for View: 00:01:33 (56.46%)
1.	Hattiesburg-Laurel MS	8,902 (34.38%)	8,324 (34.60%)	19,228 (40.30%)	65.31%	2.72	00:02:28
2.	New Orleans LA	2,516 (9.72%)	2,319 (9.64%)	3,464 (7.26%)	54.42%	3.50	00:02:42
3.	Jackson MS	2,352 (9.08%)	2,123 (8.83%)	4,618 (9.68%)	68.62%	2.66	00:01:49
4.	Atlanta GA	2,016 (7.78%)	1,844 (7.67%)	2,824 (5.92%)	57.37%	2.95	00:01:44
5.	(not set)	1,005 (3.88%)	957 (3.98%)	1,763 (3.69%)	67.67%	2.56	00:01:26
6.	Dallas-Ft. Worth TX	741 (2.86%)	700 (2.91%)	1,004 (2.10%)	52.09%	3.73	00:03:02
7.	Houston TX	632 (2.44%)	579 (2.41%)	826 (1.73%)	53.15%	3.43	00:02:24
8.	Biloxi-Gulfport MS	550 (2.12%)	526 (2.19%)	953 (2.00%)	62.33%	3.27	00:02:03
9.	Orlando-Daytona Beach-Melbourne FL	538 (2.08%)	489 (2.03%)	680 (1.43%)	58.97%	2.72	00:01:29
10.	Mobile AL-Pensacola (Ft. Walton Beach) FL	513 (1.98%)	476 (1.98%)	923 (1.93%)	62.51%	3.10	00:02:07

Overnight visitors by origin MSA (Top 10)



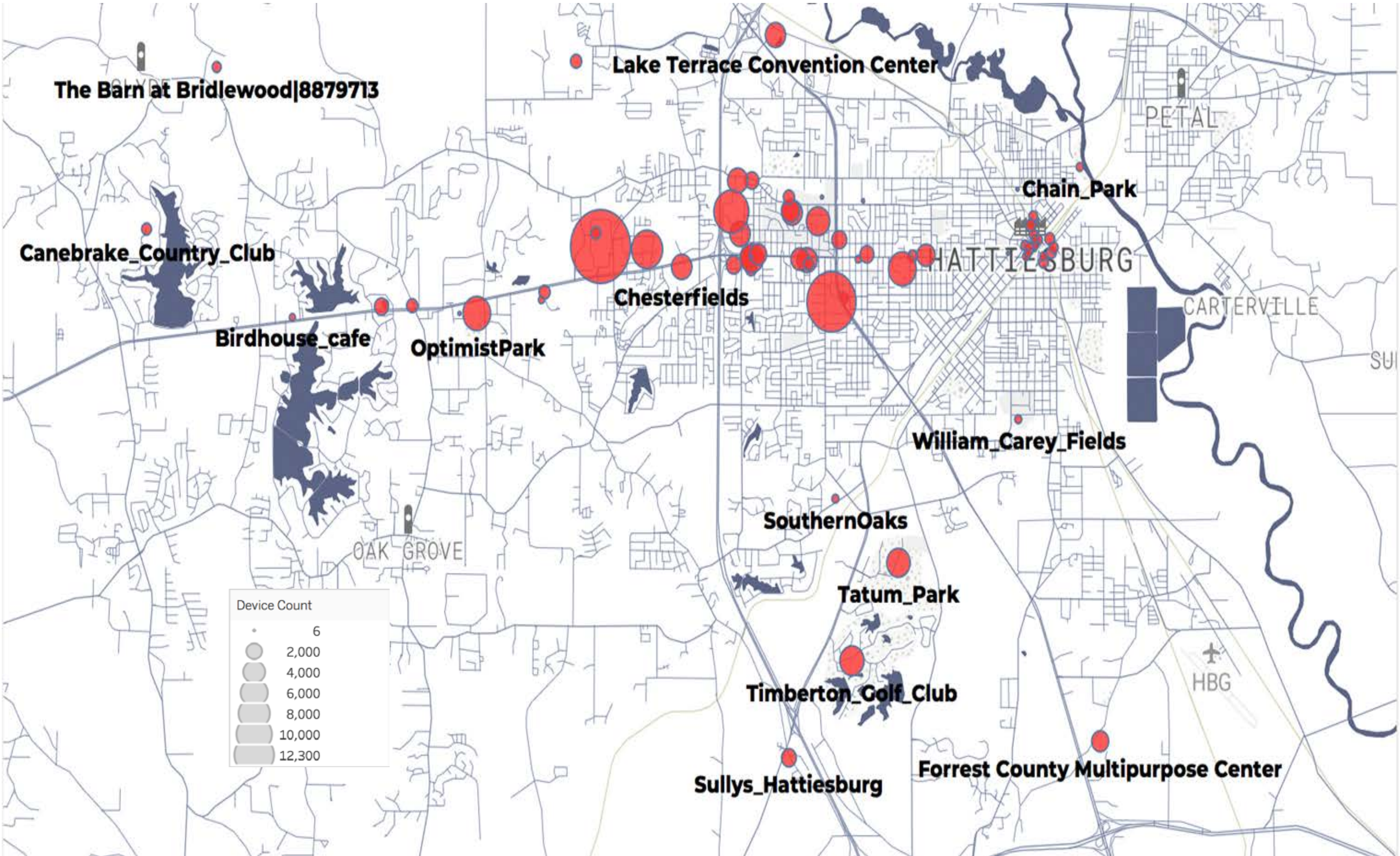
Arrivals By Date



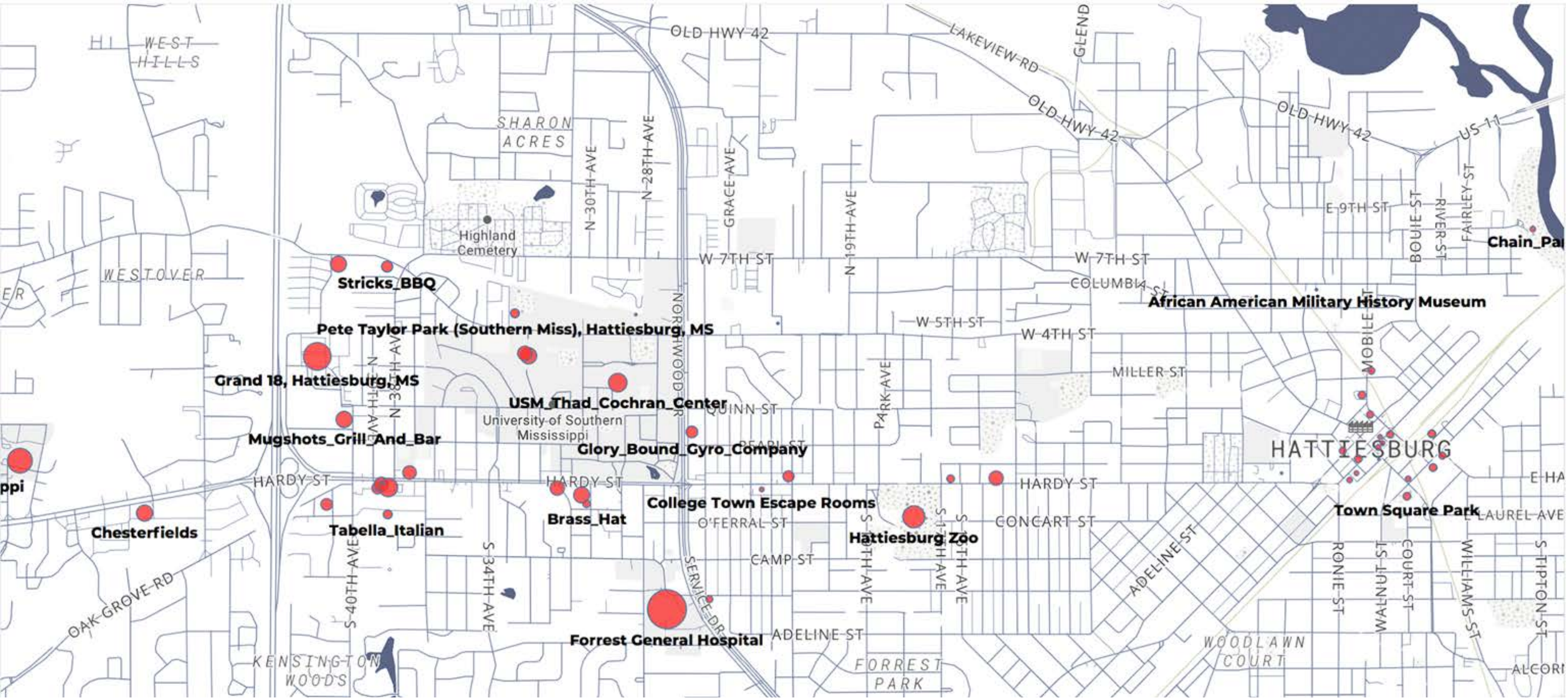
Observation #2

Are there opportunities to use sporting events and their built-in fan base to introduce Hattiesburg to new visitors?

Non-local Overnight Visits By Attraction



Non-local Overnight Visits By Attraction

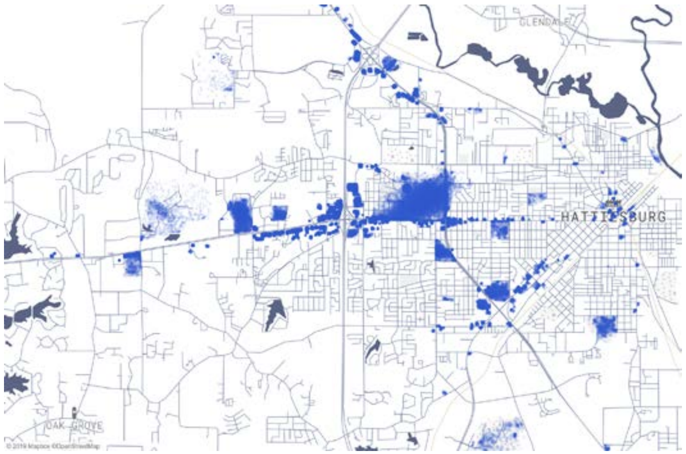


Device Count

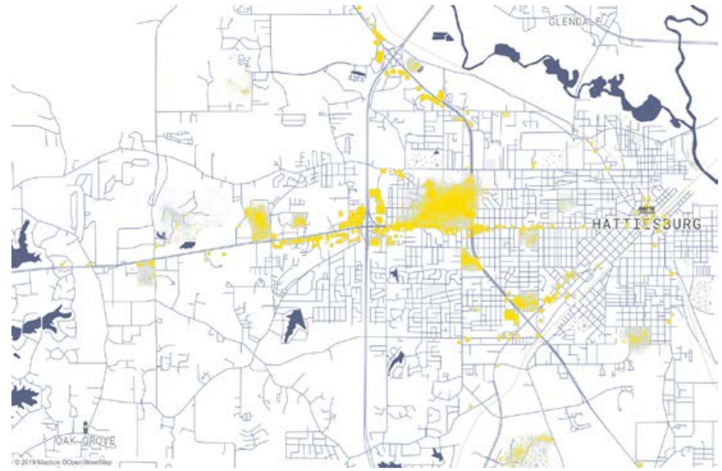
- 6
- 2,000
- 4,000
- 6,000
- 8,000
- 10,000
- 12,300

Distribution of Visits By Point By Metro Area

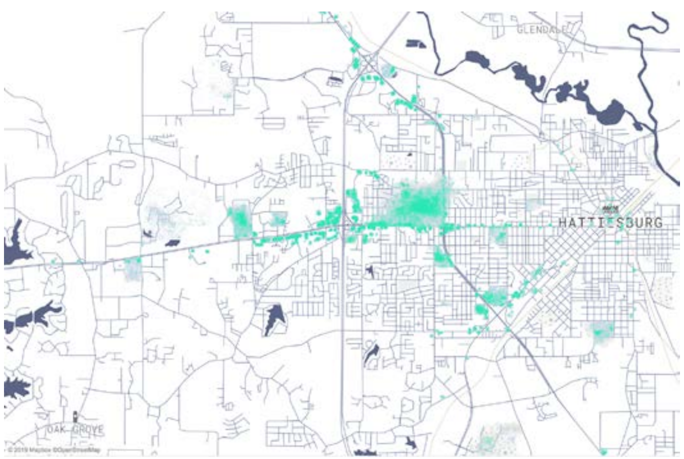
MS-Non-metropolitan Area



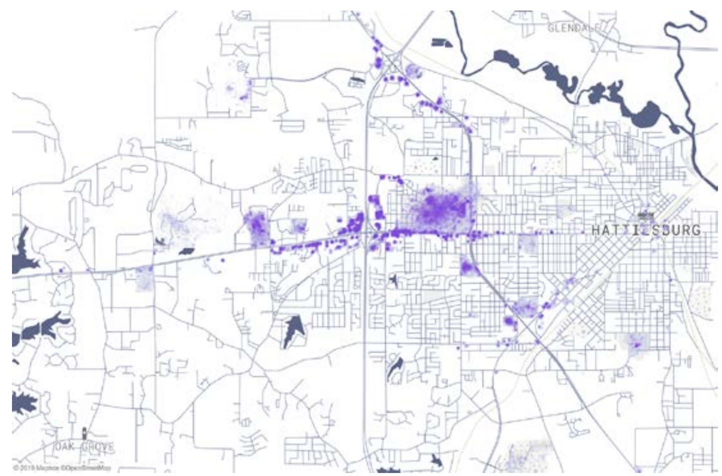
Jackson - MS



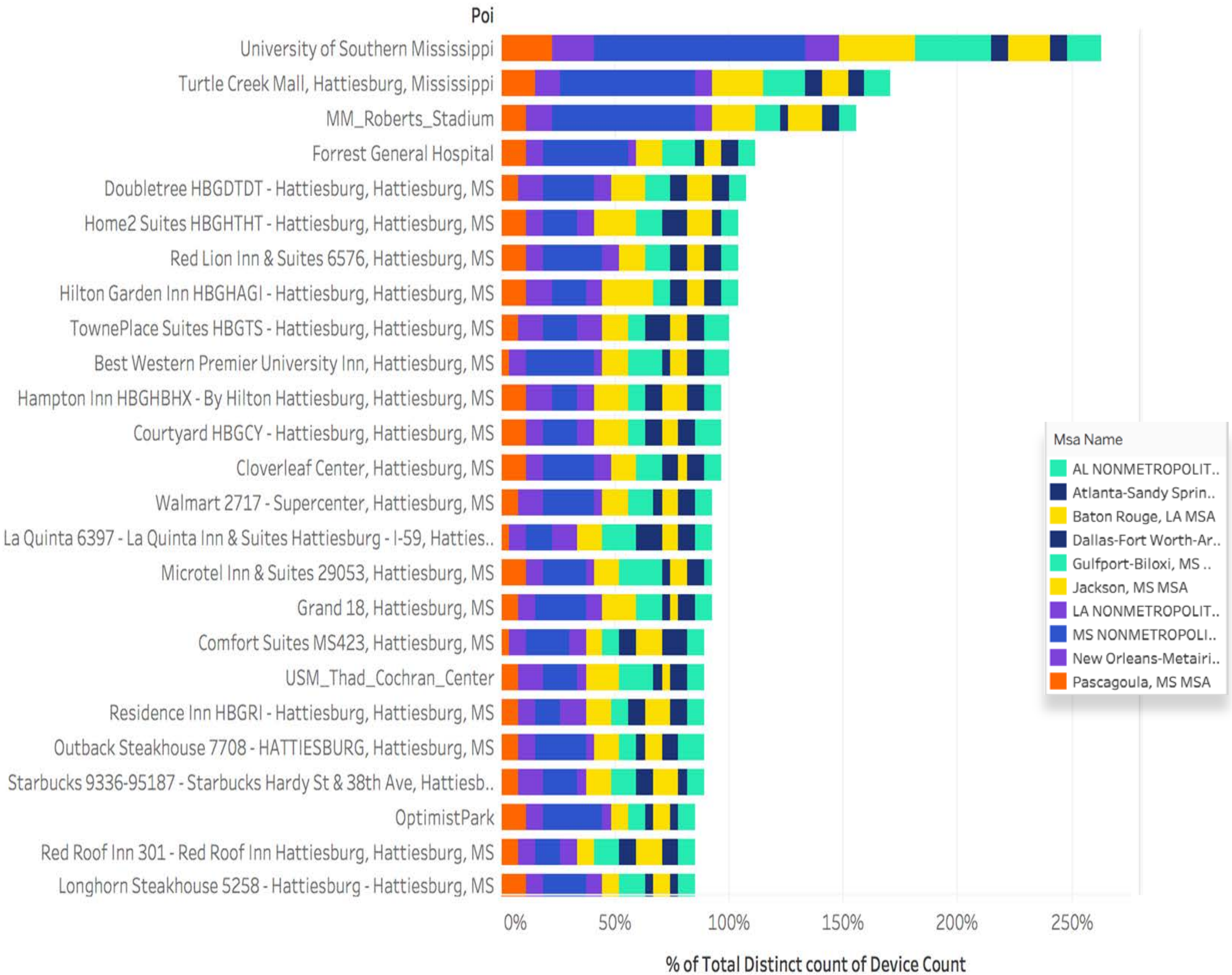
Gulfport - Biloxi



New Orleans

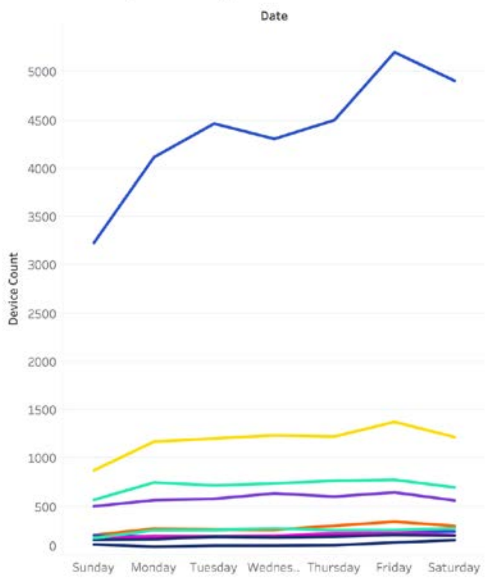


Distribution of Visits By Point By POI

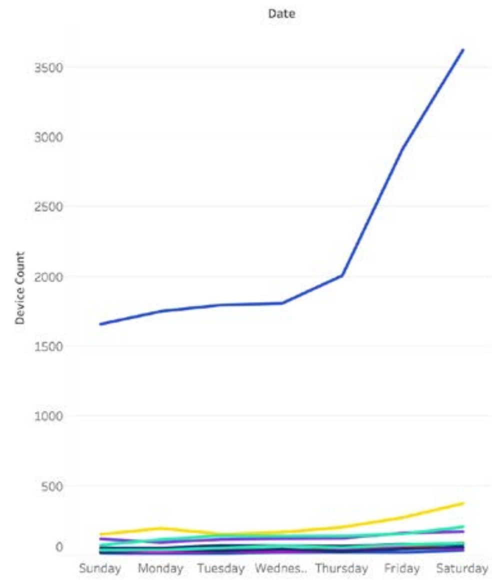


Distribution of Visits By Weekday By POI

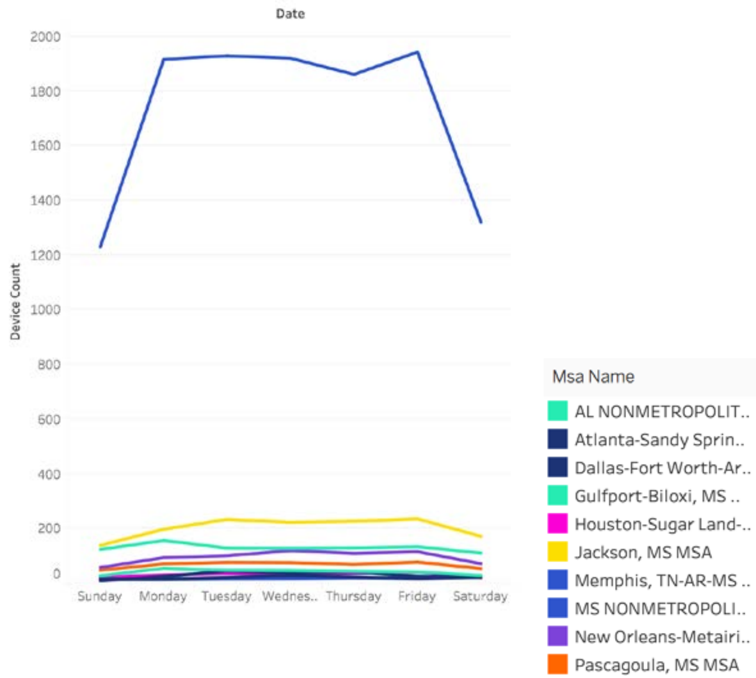
University of Southern Mississippi



Turtle Creek Mall



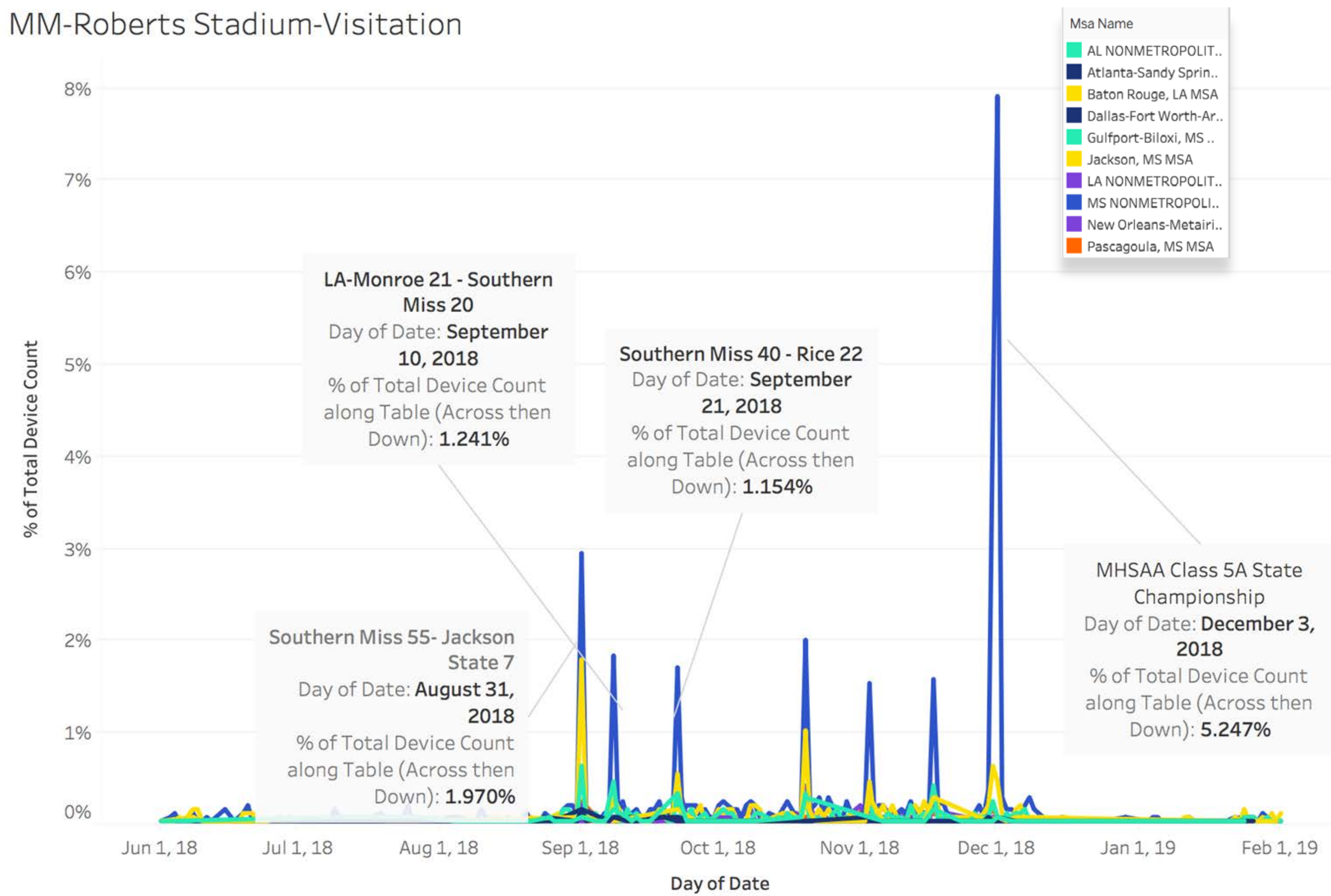
Forrest General + Merit Health



Observation #3

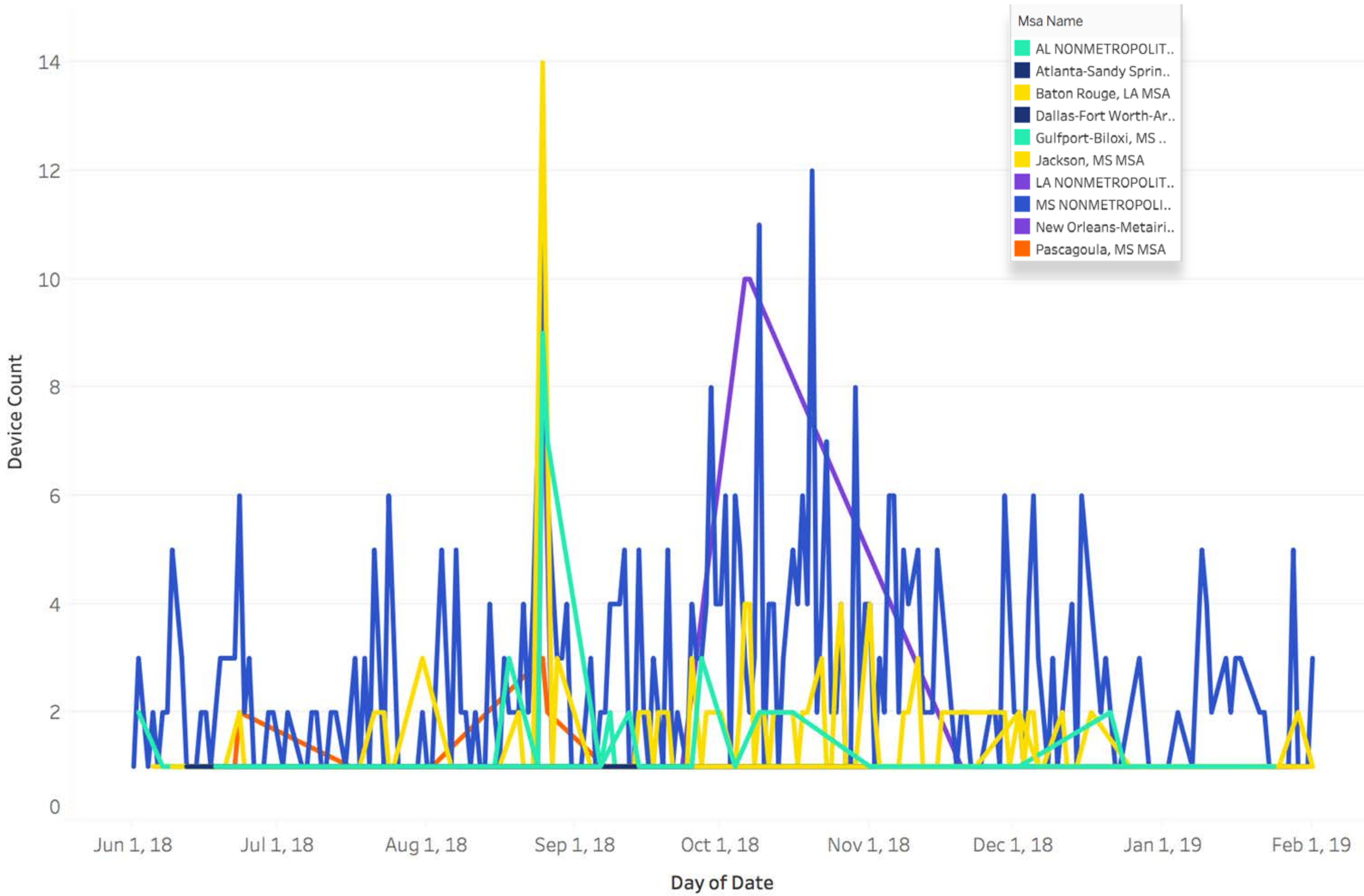
How much impact would come from introducing visitors to Hattiesburg's local restaurants, bars and attractions?

Distribution of Visits By Point By POI

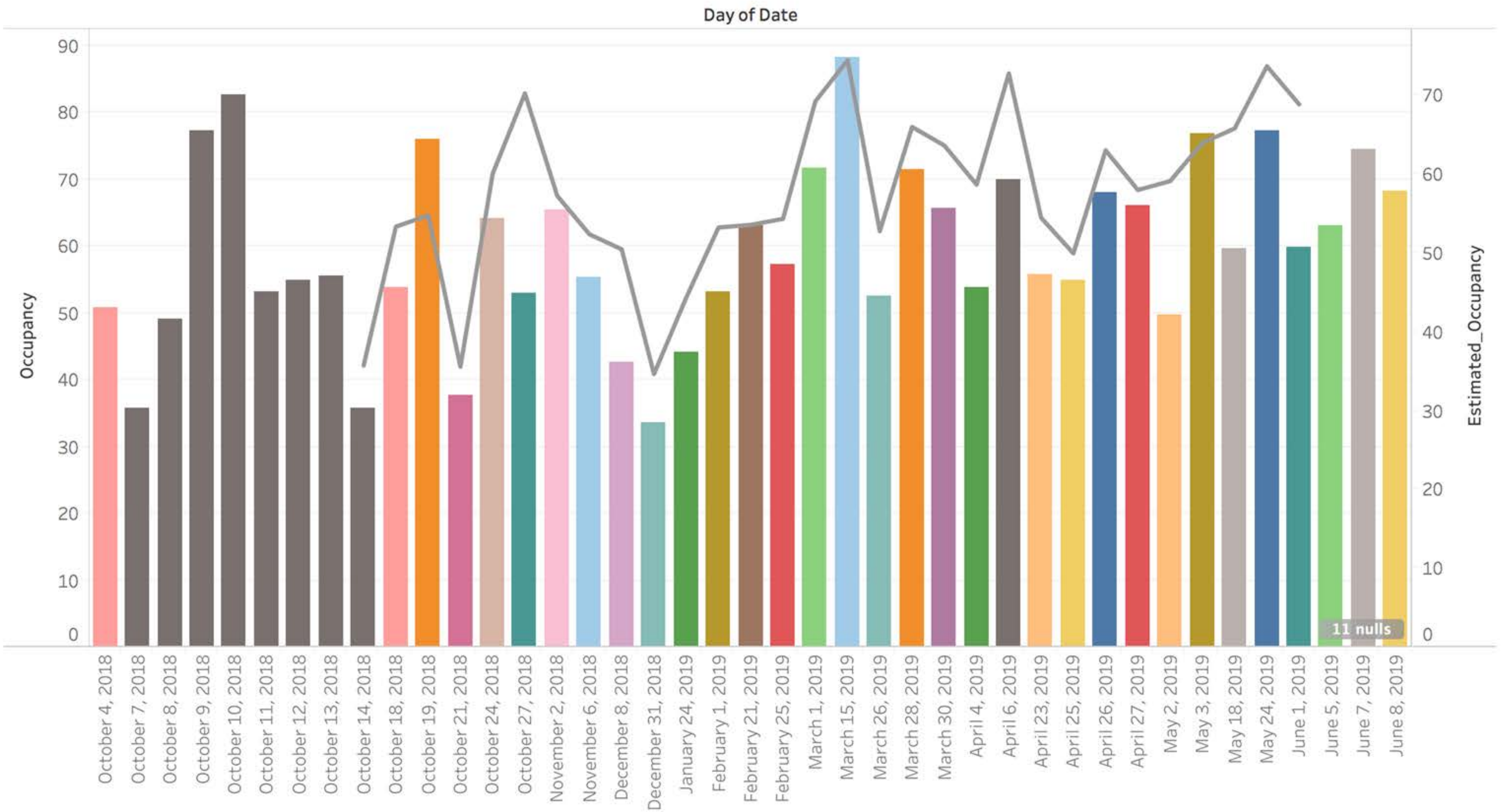


Distribution of Visits By Point By POI

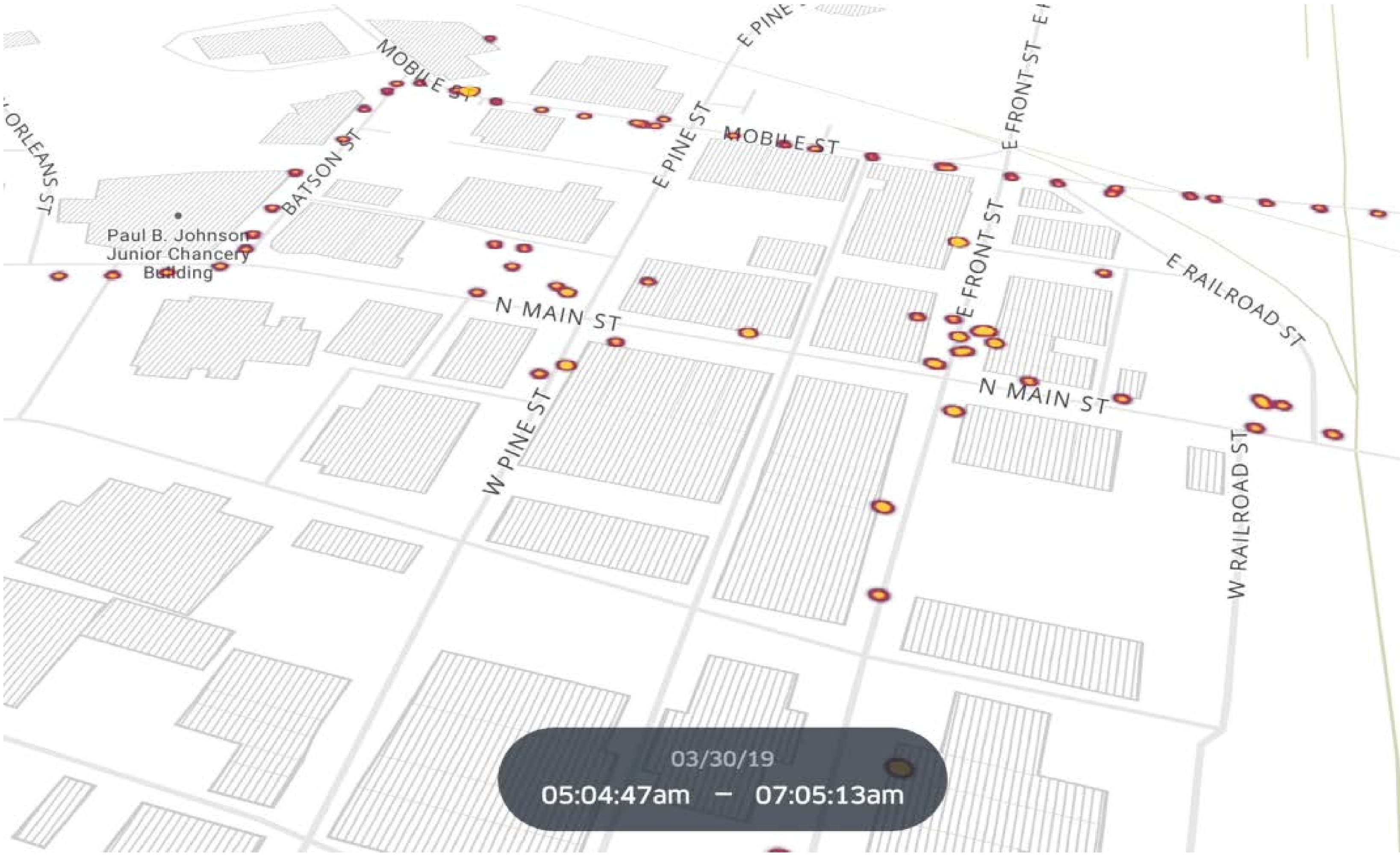
Distribution of Visits By Day By POI - Tatum Park



Event Visitation



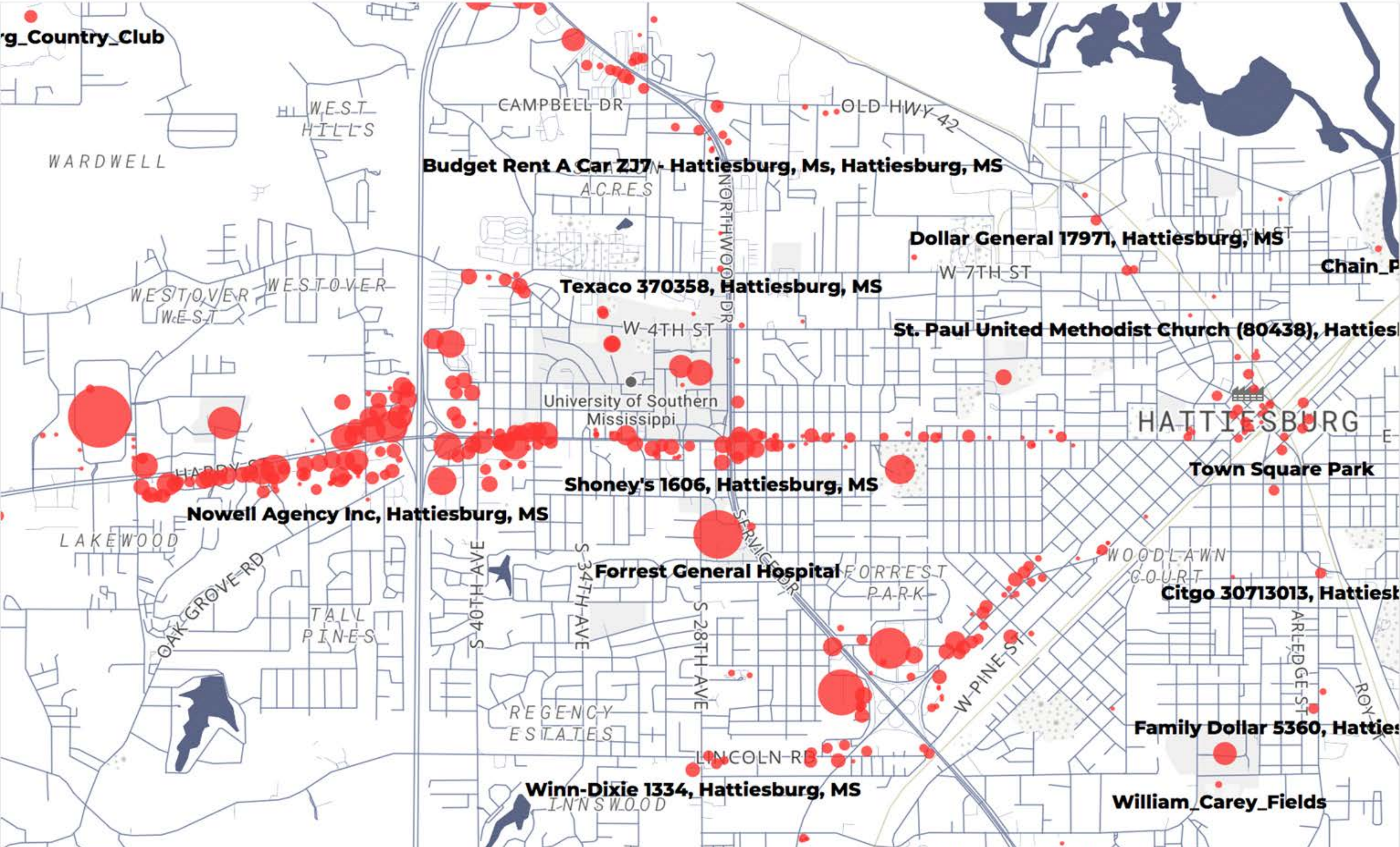
Downtown - HubFest 2019



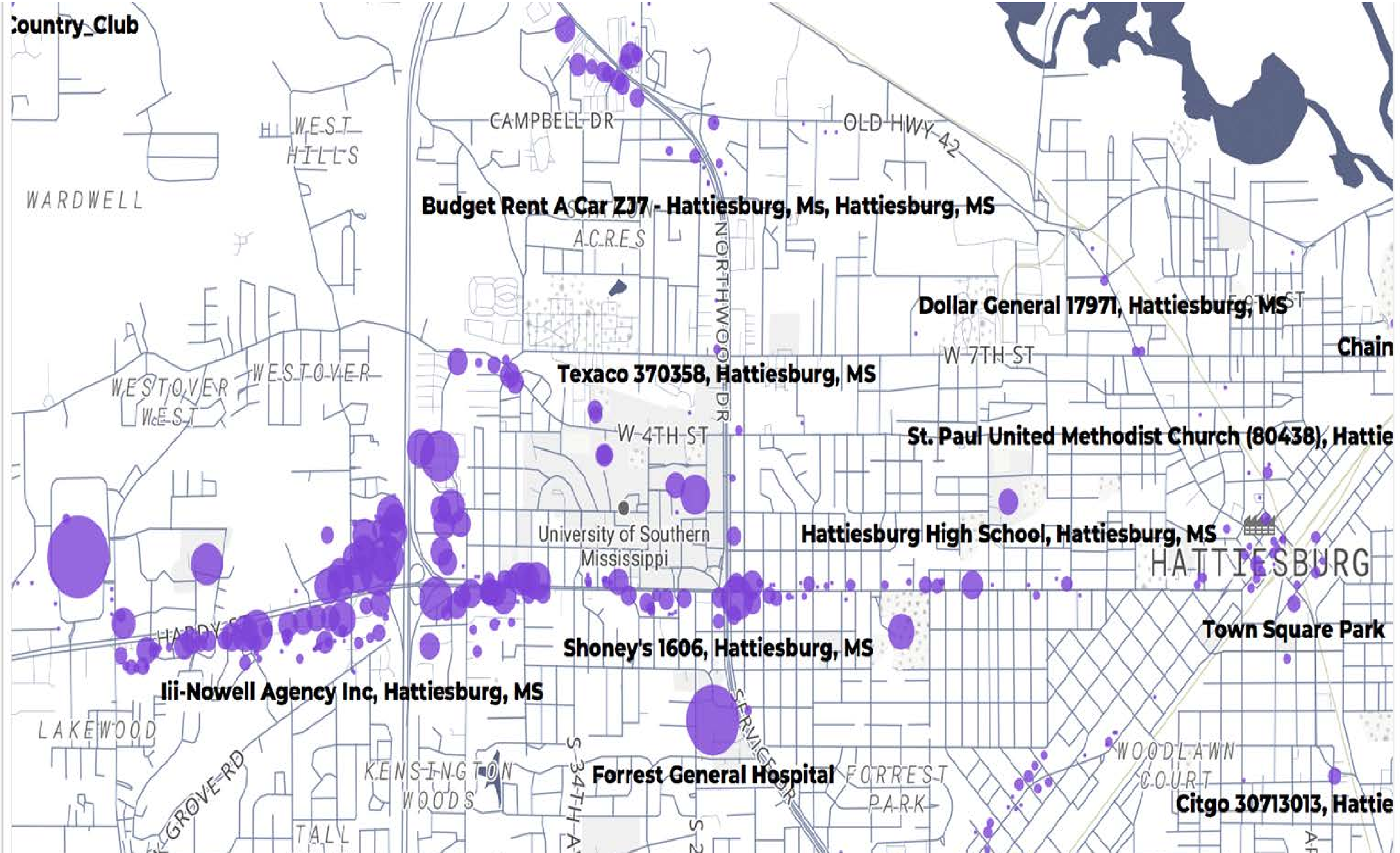
Observation #4

The impact from events is difficult to assess statistically. The greatest lift appears to come from sports tournaments.

Day-parting (All Devices) - Daytime



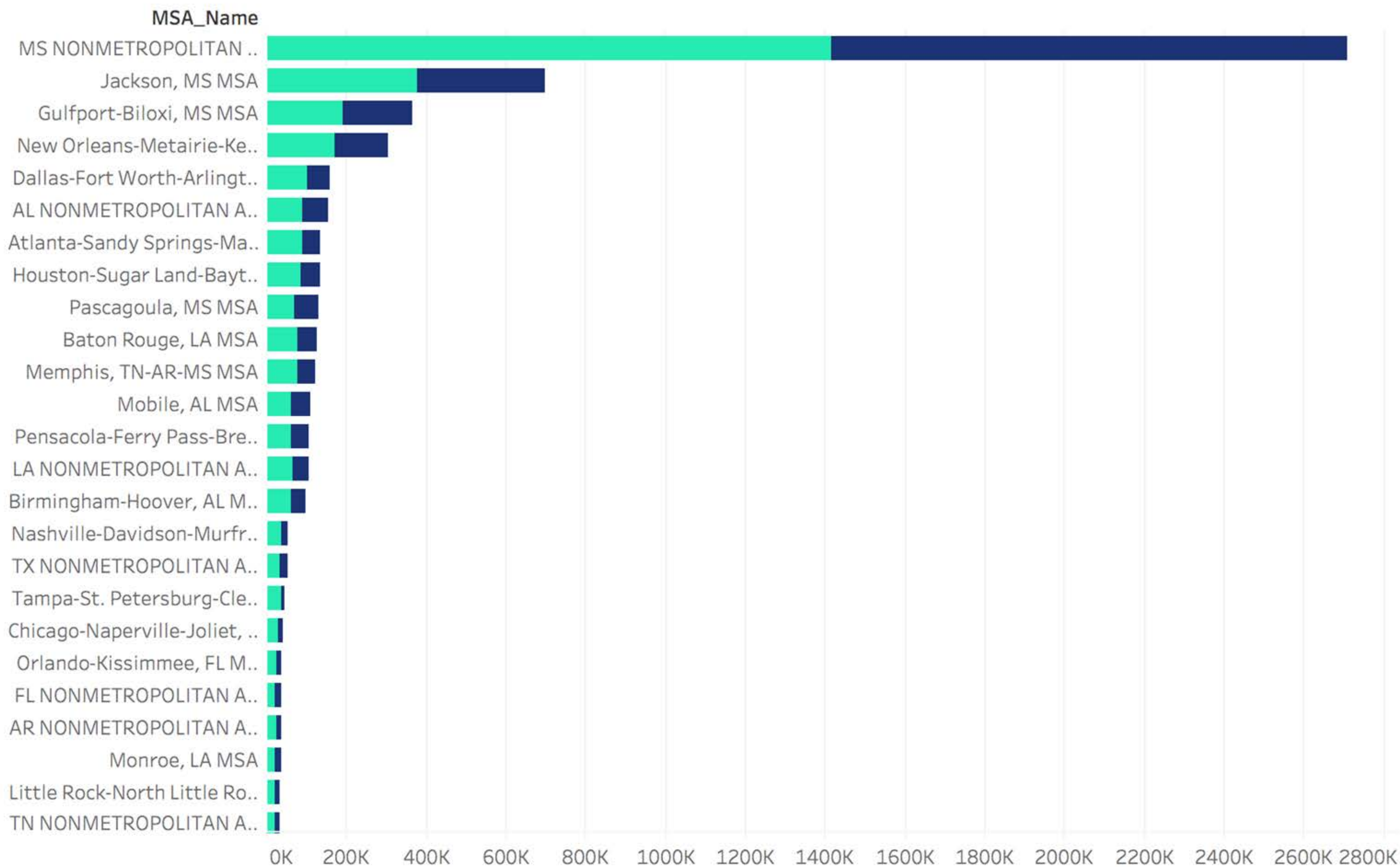
Day-parting (All Devices) - Evening



Observation #5

Many of the local, independent businesses are downtown, what can be done to drive visitation to this area?

Visitor Spend Index (Draft)



Observations & Conclusions From Entrada

- The data confirmed the large volume of pass-through visitors, stopping in Hattiesburg on their way to another location. Programs that can move these visitors "up the ladder" from stop-through to having a meal, stopping for a meal to 1/2 day, 1/2 day to full day will help to capture a larger share of visitor spending.
- The economic impact of events was inconclusive. The few events that stood out as drivers of an increased number of hotel nights were youth sports tournaments, which did seem to drive visitation higher than the seasonal average.
- In order to support downtown the location data clearly shows that better way finding and cosmetic improvements need to be put in place connecting downtown to your busy retail and hotel districts. The data shows this should start from the downtown and work it’s way out according to budget.
- Overall demand increased by roughly 30% during the year evaluated. The overall trend line seems to be strong. Demand is defined as the number of searches for Hattiesburg hotels during the given time period. You should continue to lean into these trends. As mentioned, there is plenty of traffic passing through the community and by the doors of businesses.
- Create a framework for how best to measure improvements for these areas year over year. Again to highlight what we believe your key goals should be:
  - Increasing time in market
  - Increasing demand for market (searches)
  - Increasing room nights by grabbing attention of short term booking opportunities
  - Help increase look to book ratios by working with OTA market managers.
  - Identify year over year weight to key areas of growth in the city such as downtown.