



**GULF SHORES &
ORANGE BEACH
TOURISM**

Alabama's White-Sand Beaches

Visitor Profile Research

Spring 2019

Strategic Marketing & Research Insights, LLC

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Introduction

Visitor Profile Research – Spring 2019

Background

- The Gulf Shores & Orange Beach area is a year-round leisure travel destination featuring 32 miles of white-sand beaches along Alabama's southern border to the Gulf of Mexico. The destination has offered largely condo/vacation rental in terms of paid lodging inventory. But with new hotel properties rapidly coming online, there is a need to understand different audiences and behaviors for hotel users versus the more traditional visitors who stay in vacation rentals.
- Gulf Shores & Orange Beach Tourism (GSOBT) is responsible for marketing the Alabama Gulf Coast as a year-round destination, while stewarding a thoughtful, sustainable level of growth. In support of this mission, GSOBT has conducted quarterly visitor profile research for nearly 20 years. To attract and manage additional visitation to the area, it is critical to have a thorough understanding of the current situation, and visitor profiling is a vital way to gain that understanding.
- GSOBT began partnering with Strategic Marketing & Research Insights (SMARInsights) to gather information from 2017 and 2018 visitors to better understand the visitor experience, existing image of the area, demography and geographic origins of visitors by season.
- The objectives of the current research on 2019 visitors include understanding what visitors think of the area, what drives them to visit, what their experience is in the area (tracking customer service ratings in particular), trip satisfaction and characteristics, and travel planning. The methodology is largely online and is outlined in detail in the following section.
- This report is the first of four seasonal reports for 2019.

Research Objectives



Gather information on spring visitors, determining visitor origins and demographics



Explore the motivations that drive visitation to the area, satisfaction with the experience, and additional opportunities that may exist



Profile target visitors: those who stay between one and 30 nights in paid accommodations in the Gulf Shores, Orange Beach, or Fort Morgan area



Gather data on day trippers and compare those metrics to target visitors



Compare data gathered from recent travelers to those who came to the area in 2017 and 2018



Forward conclusions and recommendations to assist GSOBT in staying current with marketing and strategies

Methodology

- This report presents information collected through online surveys of visitors to Gulf Shores, Orange Beach, or Fort Morgan during spring 2019 (March through May).
- Potential respondents were screened to ensure they were travelers to the Gulf Shores/Orange Beach area and were at least 25 years of age.
- Travelers were asked about multiple trips.
- Target data is weighted to match the destination’s actual occupancy rates (hotel and vacation rental) over the relevant time period, which remains at 80% condo/vacation rentals and 20% hotel stays.
- Surveys were conducted in the markets where UberMedia’s mobile data indicated were home markets for devices that spent time in the Gulf Shores/Orange Beach area during the spring months. More detail is included on the following slide.

Number of trips represented in the data	Spring 2019
Target trips (stayed 1-30 nights in paid accommodations)	428
Non-target trips (visited but did not stay overnight)	130

Identifying Visitor Origins: Methodology

1. Find visitors



- The first step in visitor profile research is finding visitors. Intercept methodology (interviewing visitors while they're on site in the destination) is the most direct way of finding visitors, but it presents a number of problems* that make the data untrustworthy. So we need another solution.
- SMARInsights partners with UberMedia (more detail on the following page) to identify visitors' origin markets. UberMedia's technology tracks consumers' mobile devices to tell us where GS/OB visitors came from.

2. Survey visitors



- Now that we know where visitors came from, we can survey in those markets. We have a greater chance of finding visitors to survey in the identified markets, and this keeps data costs low.
- The trip information reported here comes from surveying visitors in the markets identified from mobile device tracking.

*Problems with intercept methodology:

- Not representative of the traveler population; heavy users are overrepresented
- Expensive
- Need to be implemented over a long period of time in order to include data on all seasons
- Interrupts visitors during their trip, which can be an annoyance to visitors
- Gathers data before a trip is complete, so produces incomplete data

Identifying Visitor Origins: UberMedia

- UberMedia is a mobile data analytics company providing location-based behavioral information and analytical insights. The company's capabilities are in the collection, preparation and dissemination of mobile consumer data focused on location and behavioral information. UberMedia develops solutions for mobile advertising, location measurement, and business intelligence.
- While the numbers fluctuate on a monthly basis, and UberMedia is always adding mobile devices to its database, on average, the company accesses location-based data from approximately 300 million devices in America and 1 billion outside of America, for a total of approximately 1.3 billion total unique devices every month. UberMedia pulls location-based data from more than 150,000 different apps every month. These apps consist of a very broad spectrum of apps in order to engage a wide array of nationalities, demographics, and audience profiles, including The Weather Channel, TextNow, DraftKings, MeetMe, CBS Sports, TuneIn Radio, Paint by Numbers, Skout, theCHIVE, Jigsaw Collection HD, Tagged, TheScore, TV Guide, Twitter, Trebel Music, UNICORN – Color by Number Game, Solitaire One, and Spades. UberMedia has stored location-based data on its servers since 2015, allowing a look back to that period.
- In the subject study, UberMedia saw 454,746 unique non-resident devices that entered the defined GS/OB area during spring 2019. (Unique meaning that if the same device was in GS/OB on multiple occasions, it was only counted once). These devices identified the markets in which SMARInsights surveyed to find spring visitors.

Accuracy and Limitations of Mobile Location Data

- UberMedia strives to pull between 2% and 10% of all devices entering a geofenced area. Statistically speaking, UberMedia's data aims to be at 99% confidence with a 1% margin of error.
- Mobile data is not tracking someone 100% of the time. Locations are only given off when someone is connected to data, whether it be cellular or Wi-Fi. Some tourists, especially international visitors, often leave their phones on airplane mode, which make them impossible to track during those times.
- UberMedia believes in full transparency and always provides a mobile device count along with reporting, should any partner wish to see how many devices we have access to in a geofenced area.



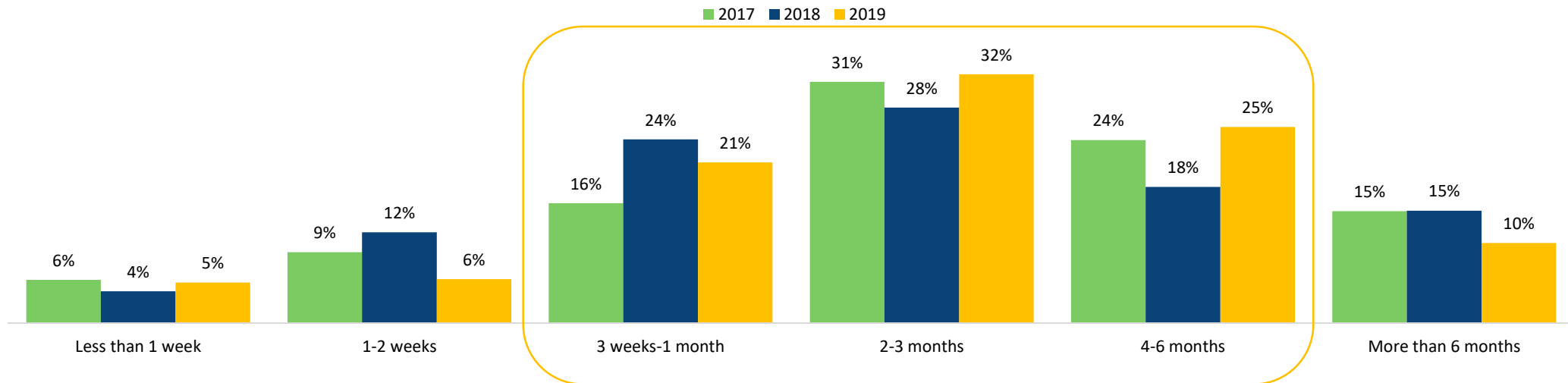
Detailed Findings

Visitor Profile Research – Spring 2019

Travel Planning

- Most (78%) of spring trips are planned between 3 weeks and 6 months ahead of time. There is a difference in planning horizon by lodging type, as we will see next.
- Compared to last year, the travel planning horizon is longer, which is consistent with a higher share of new visitors. New visitors, unfamiliar with a destination, tend to begin planning farther in advance of a visit.

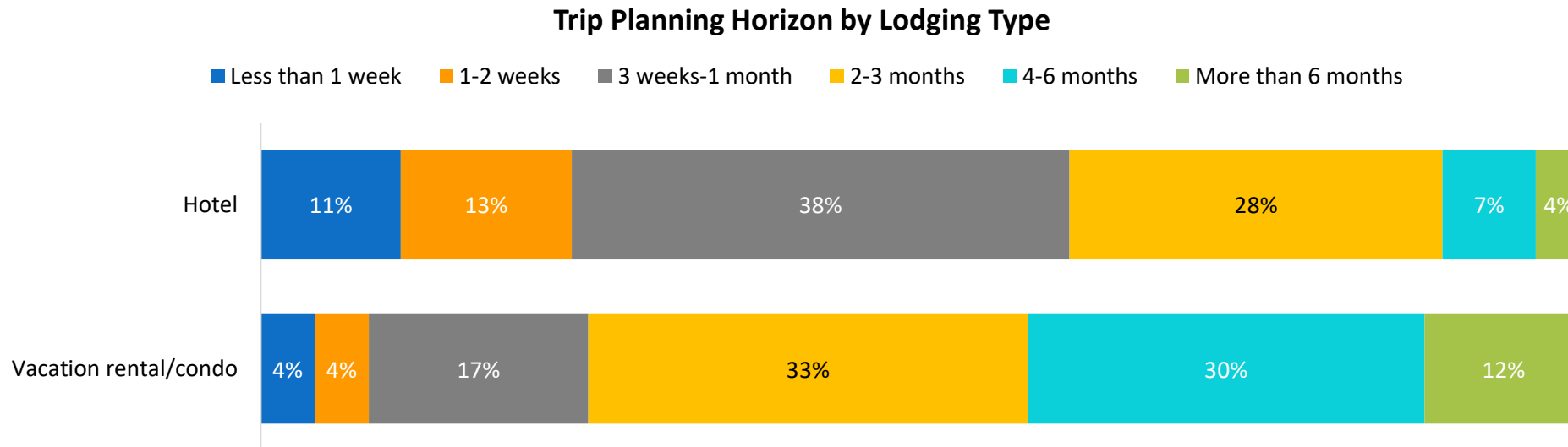
How far in advance did you begin planning your trip to Gulf Shores/Orange Beach?



Question text: How far in advance did you begin planning your trip to Gulf Shores/Orange Beach? Response options as shown in graph above.

Travel Planning – Hotel vs. Condo Rental

- Those who stay in hotels are more likely to plan and book in the short term. More than half of spring hotel trips are planned in a month or less, while more than half of vacation rentals are planned more than 2 months ahead of time. This is consistent year over year for spring trips.



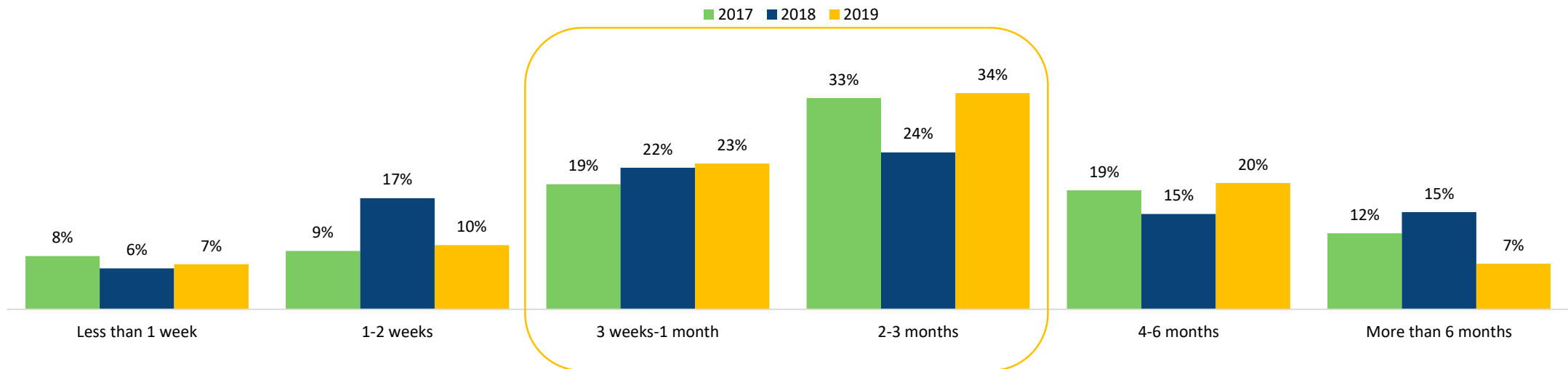
Vacation rental/condo n=150 (a); Hotel/motel n=278 (b); a / b indicate statistically significant differences at the 95% level.

Question text: How far in advance did you begin planning your trip to Gulf Shores/Orange Beach? Response options as shown in graph above.

Travel Planning

- More than half (57%) of lodging bookings take place between 3 weeks and 3 months ahead of travel. As with planning, there is some lengthening of the time between booking and visitation, consistent with more new visitors.
- Some travelers indicate booking lodging farther ahead than beginning to plan their trip, indicating that these travelers do not consider lodging part of the trip planning process. Visitors who respond this way are more likely to be repeat visitors.

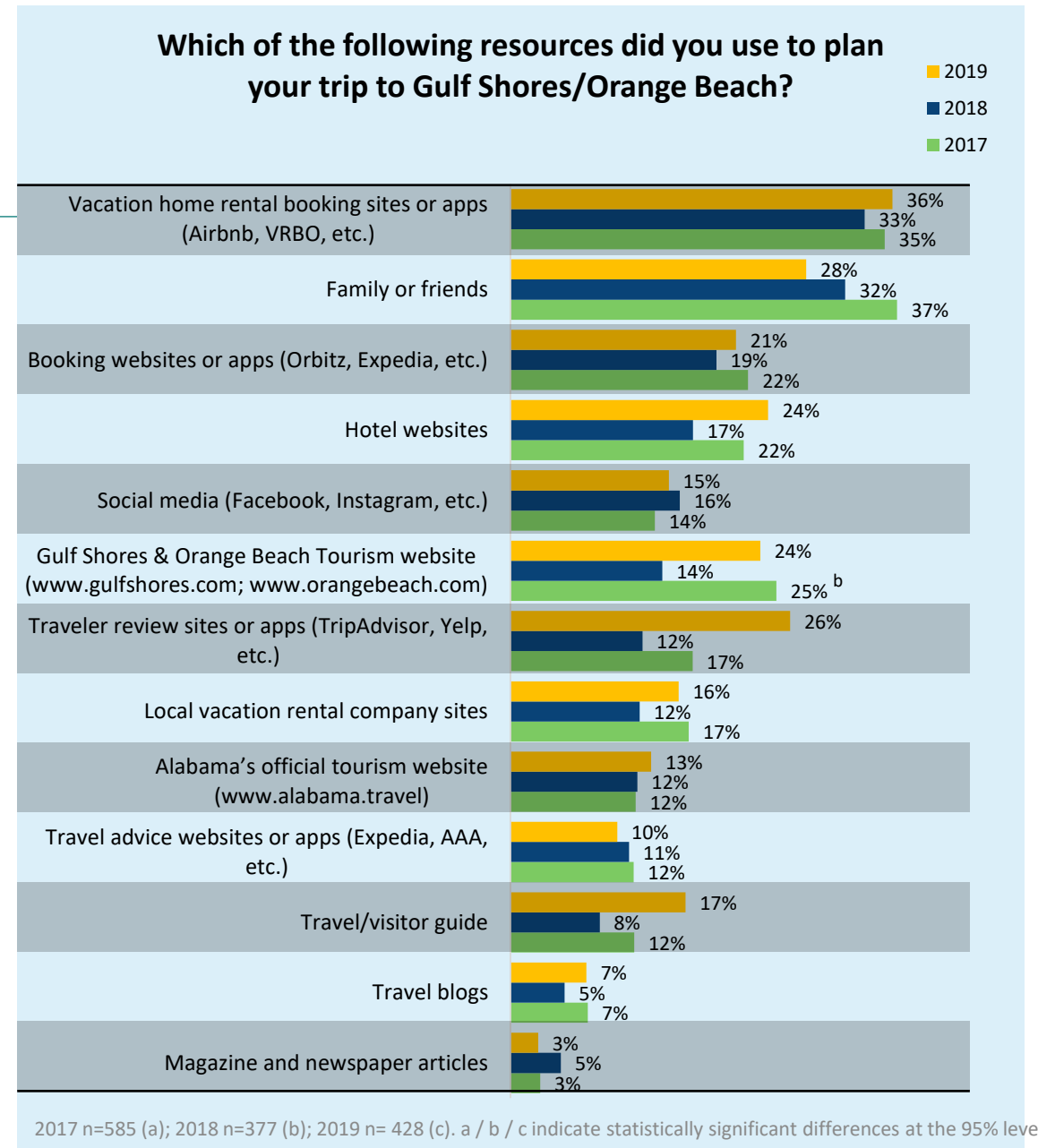
How far in advance did you book your lodging in Gulf Shores/Orange Beach?



Question text: How far in advance did you book your lodging in Gulf Shores/Orange Beach? Response options as shown in graph above.

Travel Planning

- We see a directional decline year to year in reliance on family and friends in favor of online resources, which are becoming more plentiful and more sophisticated.
- Many online resources also offer last-minute incentives, which corresponds to a shorter planning horizon.

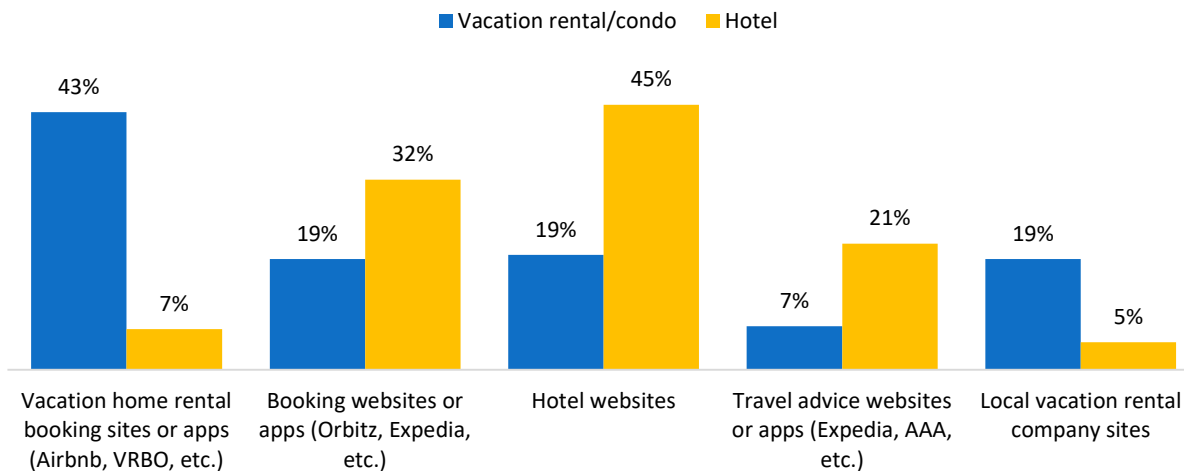


Question text: Which of the following resources did you use to plan your trip to Gulf Shores/Orange Beach? Response options as shown in graph.

Travel Planning – Hotel vs. Condo Rental

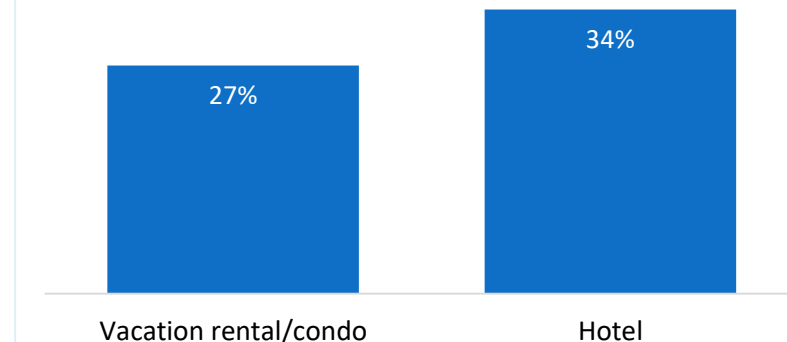
- Many differences in trip planning resources by lodging type are intuitive – those who stay in vacation rentals use vacation rental sites and apps more, and those who stay in hotels use hotel sites more.
- As we’ve seen in prior spring measures, hotel users are more likely to visit a GS/OB Welcome Center and more likely to use travel advice and booking websites – resources consistent with new visitors.

Trip planning resources with biggest difference by lodging type



Question text: Which of the following resources did you use to plan your trip to Gulf Shores/Orange Beach?
Response options as shown in graph above.

Visited the Gulf Shores/Orange Beach Welcome Center



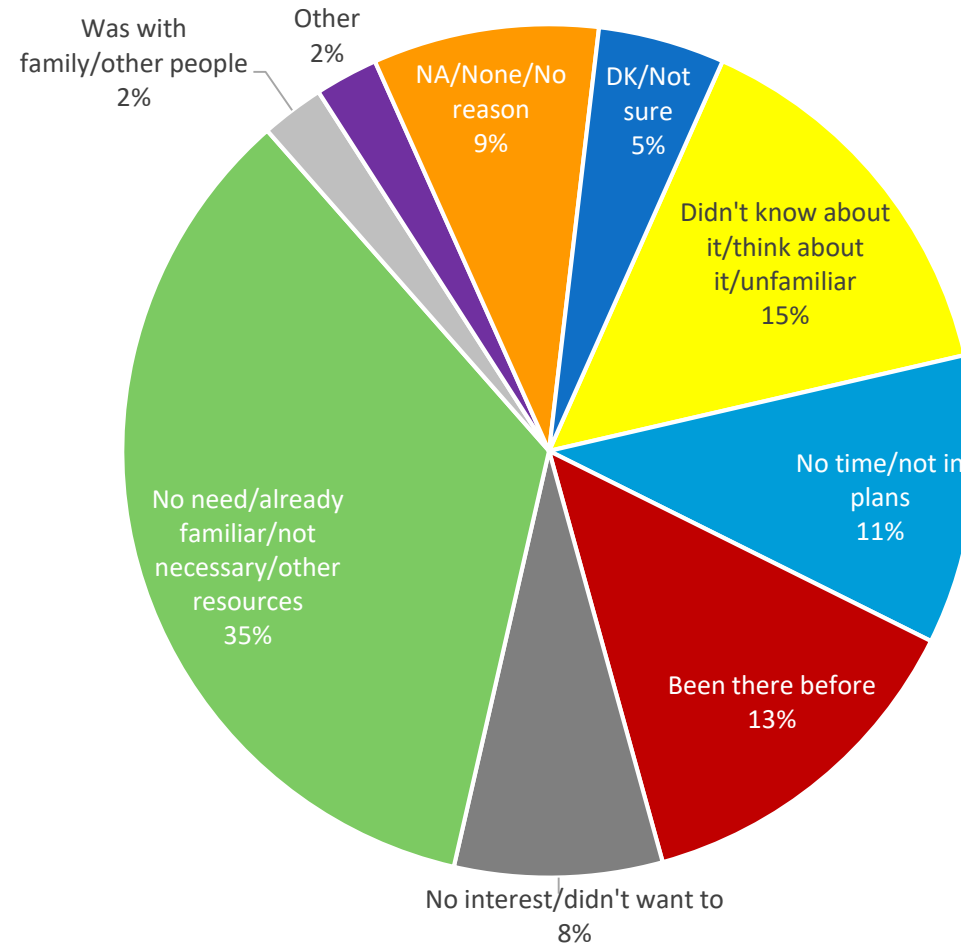
Vacation rental/condo n=150 (a); Hotel/motel n=278 (b); a / b indicate statistically significant differences at the 95% level.

Question text: Did you visit the Gulf Shores/Orange Beach Welcome Center?
Yes/No

Travel Planning

- Of those who did not visit a welcome center, the most common reason is already being familiar with the destination. We have seen this result across seasons.
- This underscores opportunities to:
 1. Promote the welcome centers to first-time visitors and
 2. Make the centers relevant to repeat visitors by featuring what's new in the destination

Why didn't you visit the welcome center?

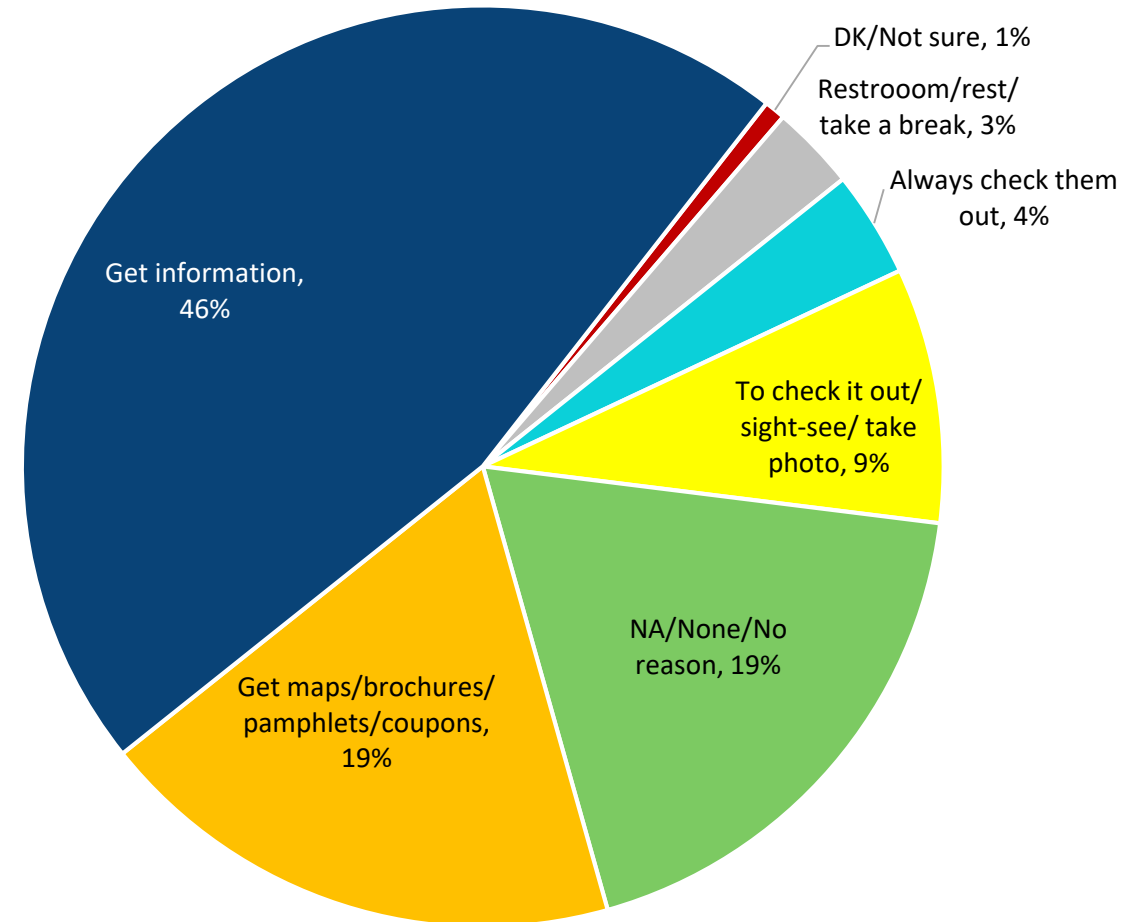


Question text: Why didn't you visit the welcome center? [open ended response]

Travel Planning – Welcome Center Visitors

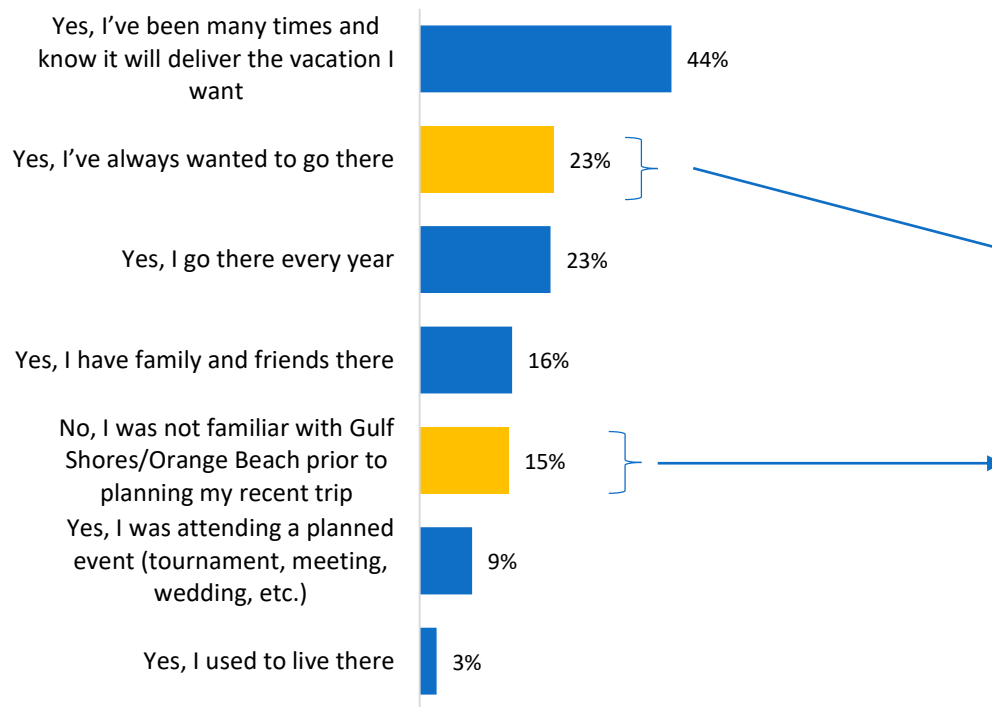
- Nearly half of visitors who stopped at the visitor center did so to get information.
- The next most common reason is for specific sources of information – maps, coupons, etc.

Why did you visit the welcome center?

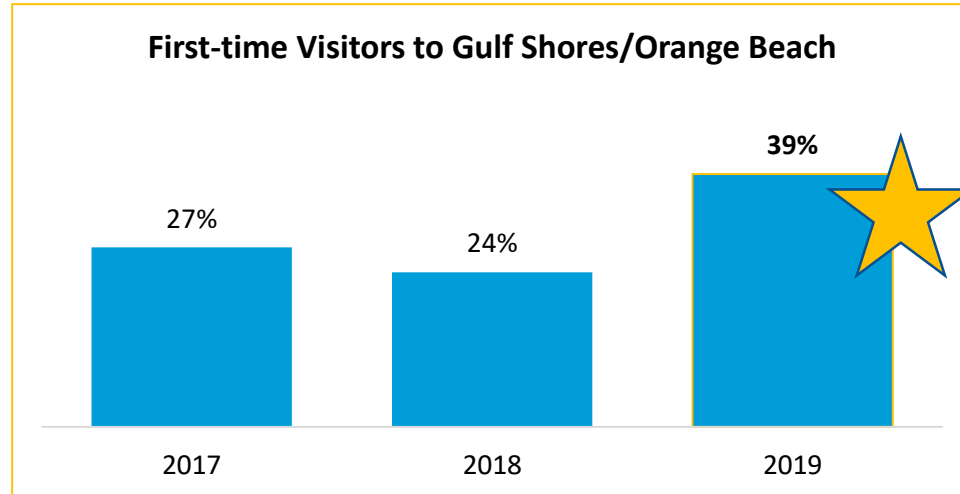


Trip Characteristics

Prior to this visit, was Gulf Shores/Orange Beach familiar to you?



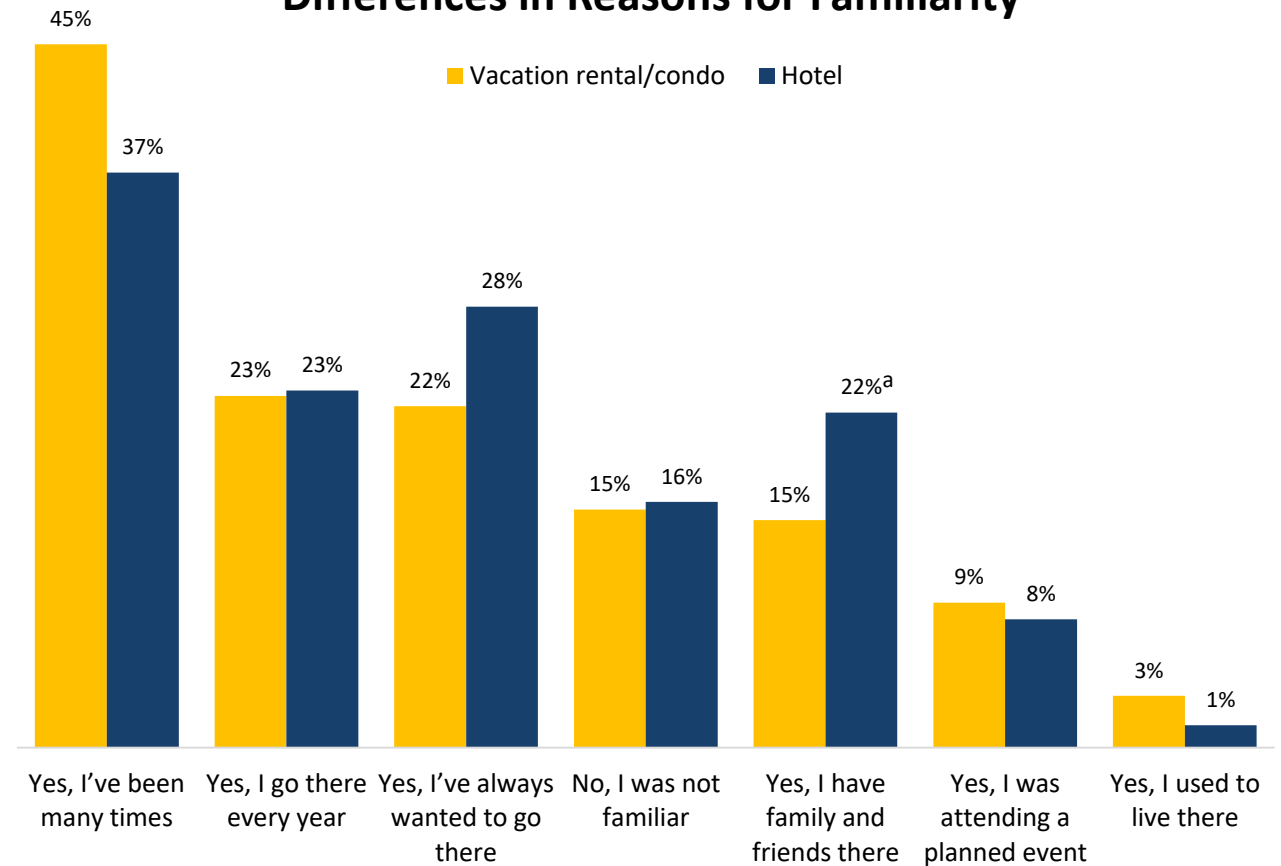
- The bulk of GS/OB trips continue to be repeat visits from those who are familiar with the destination.
- However, this spring there was a considerably higher share of first-time visitors. This points to effective marketing drawing new people to the destination.



Question text: Prior to your visit, was Gulf Shores/Orange Beach familiar to you? Response options as shown in graph above.

Hotel visitors are more likely to be aspirational (always wanted to go) or visiting family and friends.

Differences in Reasons for Familiarity

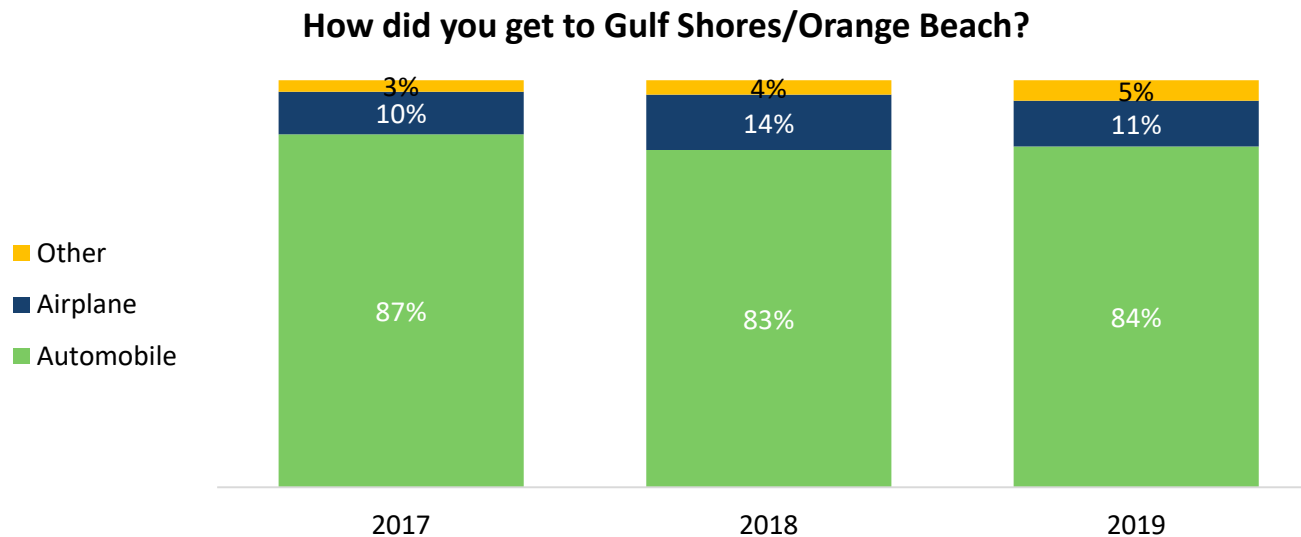


Condo/vacation rental n=150 (a); Hotel/motel n=278 (b)
 a / b indicate statistically significant differences at the 95% level.

Question text: Prior to your visit, was Gulf Shores/Orange Beach familiar to you? Response options as shown in graph above.

Trip Characteristics

- The majority of GS/OB visitors drive to the destination, although air travel is growing as air service expands. The source markets of those who fly are Chicago, Dallas, and Detroit.
- Of those who flew, most flew into Pensacola, with 16% flying into Mobile. “Other” airports include St. Petersburg and New Orleans.



Question text: How did you get to Gulf Shores/Orange Beach for your trip? Select the one mode of transportation that you used to travel the most miles for this trip. Response options as shown in graph above.



Question text: Into which airport did you fly? Response options as shown in graph above.

Trip Characteristics

- As we would expect, most trips include the basic beach vacation activities of dining out, going to the beach, shopping, relaxing, and swimming.
- Sightseeing and Tanger Outlets are part of about a third of trips.
- More niche appeal activities tend to have lower participation based on travel party make-up and trip purpose.

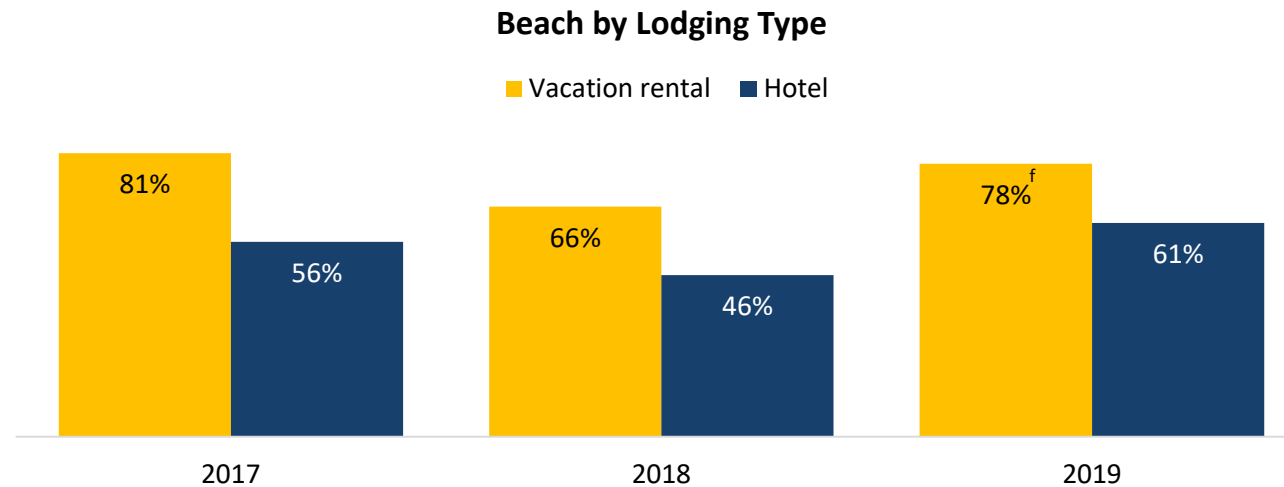
Spring trip participation	2017	2018	2019
Beaches	76%	62%	75%
Dining out	61%	51%	68%
Relaxing	65%	59%	60%
Shopping	44%	37%	53%
Swimming	56%	37%	47%
Sightseeing	40%	23%	39%
Tanger Outlets	21%	17%	35%
The Wharf	20%	10%	21%
Gulf State Park	18%	10%	19%
Fishing	18%	11%	17%
Shelling	23%	20%	17%
Hiking on trails	11%	7%	15%
Alabama Gulf Coast Zoo	6%	7%	13%
Photography	17%	15%	13%
Fort Morgan Historic Site	10%	4%	12%
Exercise/Working out	10%	10%	12%
Dauphin Island	13%	9%	12%
Historical sites	17%	11%	12%
Dolphin tour	13%	6%	11%
Concerts and nightlife	20%	19%	11%
Battleship USS Alabama	11%	6%	11%
Watching wildlife	15%	18%	11%
Boating or sailing	7%	8%	10%
Visiting friends/relatives who live in the area	13%	7%	9%
Alabama's Coastal Connection Scenic Byway	12%	10%	9%

Cont'd.	2017	2018	2019
Bicycle riding	5%	9%	8%
Kayaking/Canoeing/Paddle boarding	5%	4%	7%
Adventure Island	8%	3%	7%
Family/friends reunion	11%	12%	7%
National Naval Aviation Museum	7%	1%	6%
Parasailing/Jet skiing	6%	4%	6%
Visiting a spa	3%	4%	6%
Festivals or special events (non-sports events)	6%	7%	6%
Scuba diving/Snorkeling	5%	3%	6%
Golfing	3%	4%	5%
Bon Secour National Wildlife Refuge	3%	2%	5%
Birdwatching	4%	9%	4%
Waterville	7%	1%	4%
Sporting events	1%	1%	4%
The Track	10%	3%	3%
Bellingrath Gardens	2%	2%	3%
OWA Park	2%	3%	3%
Tennis	2%	5%	2%
Hugh S. Branyon Backcountry Trail	0%	3%	0%

Question text: What attractions and activities did you visit or participate in while in Gulf Shores/Orange Beach on your trip? Response options as shown in tables.

Trip Characteristics

- Vacation renters continue to be more likely to feature beach visits in their trip.
- There is year-to-year growth in beach usage among spring hotel visitors.



Question text: What attractions and activities did you visit or participate in while in Gulf Shores/Orange Beach on your trip? Response chosen: beach
Condo/vacation rental 2017 n=461 (a); 2018 n=298 (c); 2019 n=150 (e)
Hotel/motel 2017 n=124 (b); 2018 n=80 (d); 2019 n=278 (f)
a / b / c / d / e / f indicate statistically significant differences at the 95% level.

Trip Characteristics

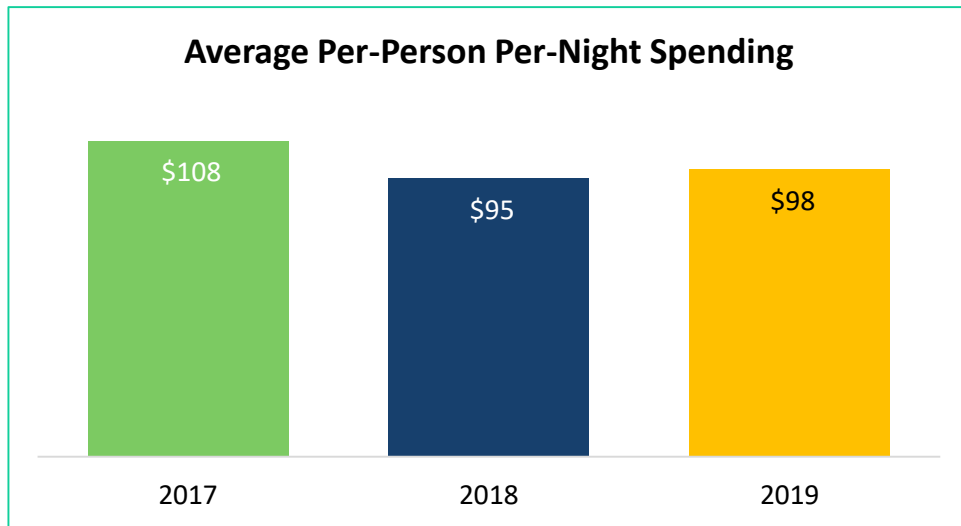
- As a follow-up to the activity-participation question, visitors were asked which of the activities and attractions they'd done had motivated them to choose GS/OB as their destination.
- These results show that the beach and related activities remain the key draw for spring visitors.

Top Spring trip motivators	2017	2018	2019
Beaches	64%	54%	66%
Relaxing	43%	39%	38%
Dining out	20%	16%	32%
Swimming	24%	16%	19%
Sightseeing	15%	9%	11%
Shopping	10%	8%	16%
Fishing	9%	6%	8%
Tanger Outlets	6%	5%	10%
Gulf State Park	4%	2%	7%
Dolphin tour	5%	3%	6%

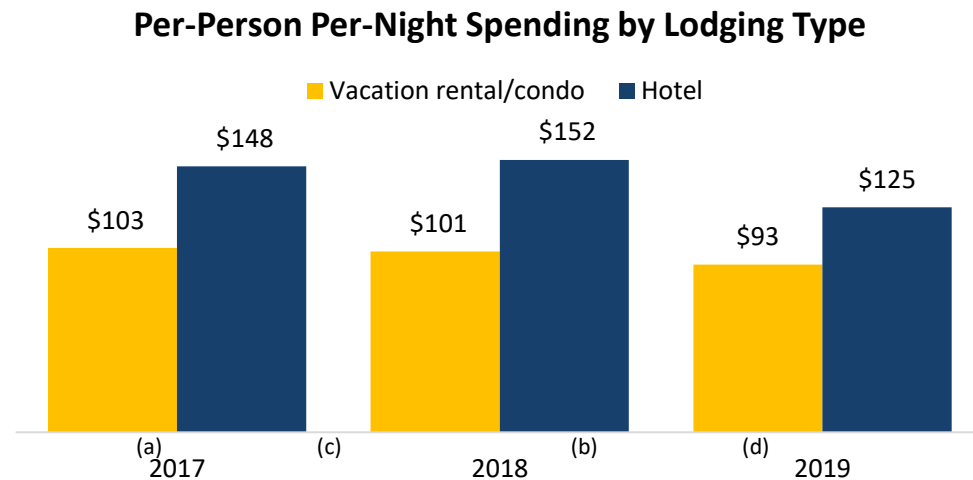
Question text: Which of these attractions and activities motivated you to choose Gulf Shores/Orange Beach as the destination for your trip? Select up to 5. Response options are those selected as activities/attractions participated in.

Trip Characteristics

- Average spring trip spending remains right around \$100 per person per night. Hotel spending brings the per-person per-night figure up. The per-person efficiency of vacation rentals is one of the appeals for larger groups and repeat visitors.



2017 n=585 (a); 2018 n=377 (b); 2019 n=428 (c)
a / b / c indicate statistically significant differences at the 95% level.



Condo/vacation rental 2017 n=461 (a); 2018 n=298 (c); 2019 n=150 (e)
Hotel/motel 2017 n=124 (b); 2018 n=80 (d); 2019 n=278 (f)
a / b / c / d / e / f indicate statistically significant differences at the 95% level.

Question text: To help us better understand the economic impact of tourism, what was the approximate amount of money your travel party spent while in Gulf Shores/Orange Beach on your trip? [Category prompts] Including yourself, how many people were in your travel party? How many nights did you stay in Gulf Shores/Orange Beach during this trip? If you did not stay overnight, please enter '0'. Open-ended numeric responses.

Trip Characteristics

- Spending is up over 2018, particularly for food and shopping.
- Condo-stay spending is higher than hotel due to longer stays and larger travel parties.

Average Travel Party Expenditures per Trip - SPRING	2017 (a)		2018 (b)		2019 (c)	
	Spending	% of total	Spending	% of total	Spending	% of total
Lodging	\$903	54%	\$809	52%	\$842	52%
Meals/food/groceries	\$325 ^b	19%	\$284	18%	\$340	21%
Shopping	\$206 ^b	12%	\$186	12%	\$214	13%
Recreation or entertainment	\$169 ^b	10%	\$164	10%	\$144	9%
Transportation within Gulf Shores	\$55 ^b	3%	\$90	6%	\$45	3%
Other	\$27	2%	\$26	2%	\$41	2%
Total	\$1,685		\$1,558		\$1,626	

2017 n=585 (a); 2018 n=377 (b); 2019 n=428 (c)

a / b / c indicate statistically significant differences at the 95% level.

Average Travel Party Expenditures per Trip - SPRING	2017		2018		2019	
	Condo(a)	Hotel(b)	Condo(c)	Hotel(d)	Condo(e)	Hotel(f)
Lodging	\$981	\$583	\$881	\$504	\$948	\$420
Meals/food/groceries	\$343 ^c	\$252	\$289	\$265	\$368	\$230
Shopping	\$198 ^c	\$241	\$166	\$272	\$216	\$208
Recreation or entertainment	\$161 ^c	\$199	\$152	\$213	\$141	\$154
Transportation within Gulf Shores	\$47 ^c	\$89 ^{ac}	\$83	\$118	\$42	\$58
Other	\$23	\$43 ^{ac}	\$21	\$47 ^{bc}	\$33	\$69
Total	\$1,753	\$1,407	\$1,591	\$1,419	\$1,748	\$1,140

Condo/vacation rental 2017 n=461 (a); 2018 n=298 (c); 2019 n=150 (e)

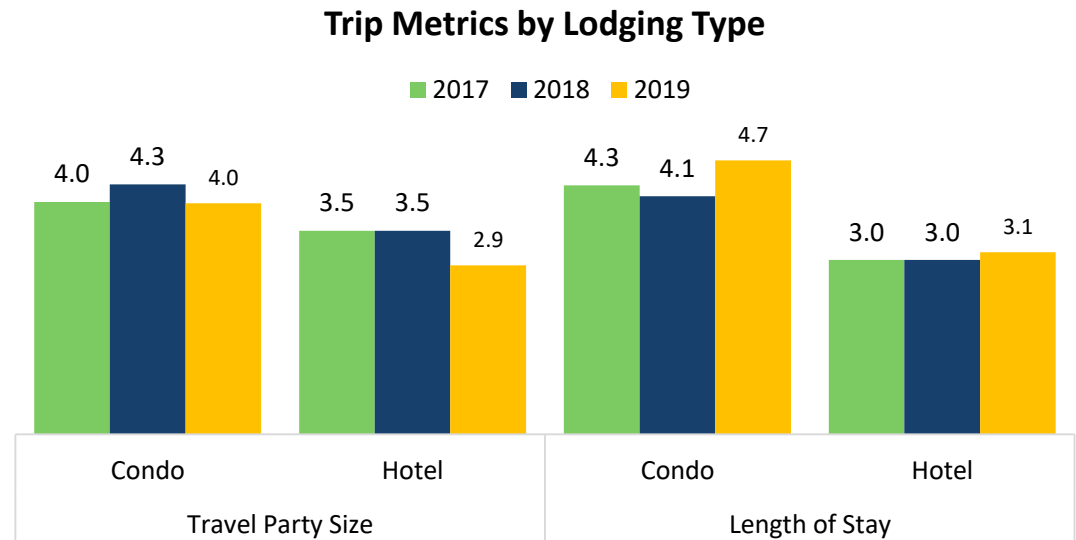
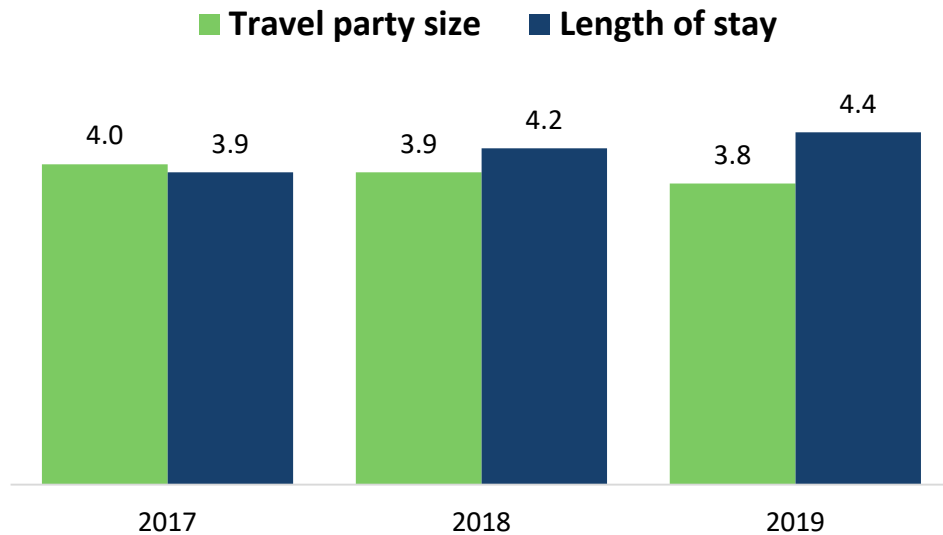
Hotel/motel 2017 n=124 (b); 2018 n=80 (d); 2019 n=278 (f)

a / b / c / d / e / f indicate statistically significant differences at the 95% level.

Question text: To help us better understand the economic impact of tourism, what was the approximate amount of money your travel party spent while in Gulf Shores/Orange Beach on your trip? [Category prompts] Open-ended numeric responses.

Travel Party Characteristics

- Overall, travel parties remain about the same size year over year.
- Visits are longer this spring compared to last; condo stays are driving this shift.

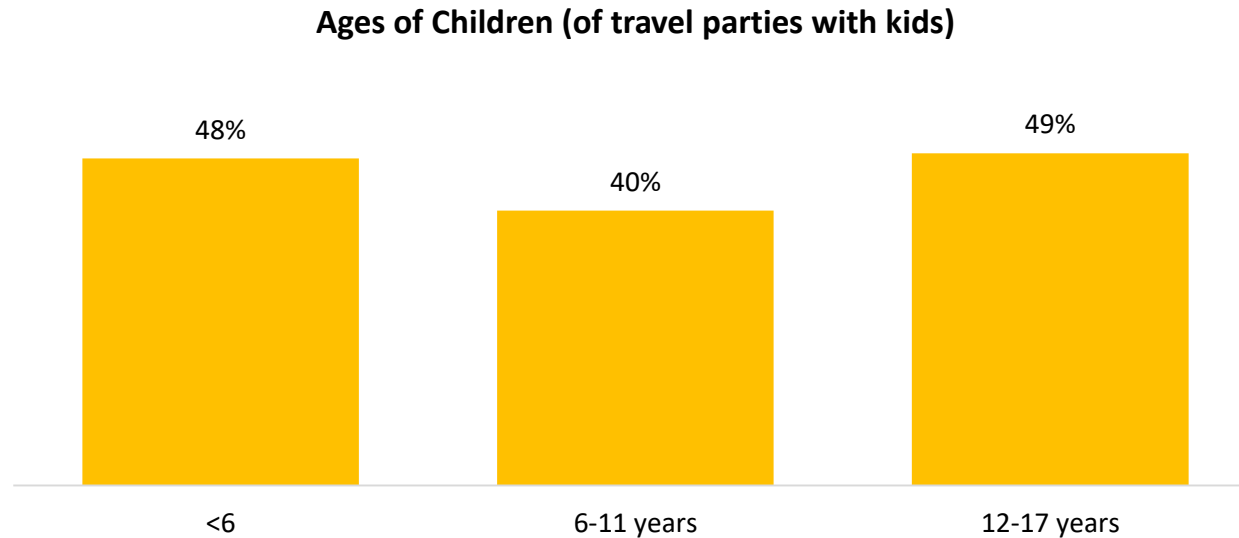


Condo/vacation rental 2017 n=461 (a); 2018 n=298 (c); 2019 n=150 (e)
 Hotel/motel 2017 n=124 (b); 2018 n=80 (d); 2019 n=278 (f)
 a / b / c / d / e / f indicate statistically significant differences at the 95% level.

Question text: Including yourself, how many people were in your travel party? How many nights did you stay in Gulf Shores/Orange Beach during this trip? If you did not stay overnight, please enter '0'. Open-ended numeric responses.

Travel Party Characteristics

- 42% of spring travel parties include children.
- Roughly half of these travel parties include young children (under 6), which coincides with recent marketing efforts aimed at families with pre-school aged children, a key target for spring visits. About half of travel parties with kids include teens.



Question text: What ages were the children in your travel party? Response options as shown in graph above.

Travel Party Characteristics

- Visitors look similar year-over-year in terms of:
 - The majority of travel decision makers are female
 - Most are married
- Average household income is higher this spring than last.
- Recent visitors are older than in prior years.
- Next we will look at demographics by lodging type.

Year-over-Year Demographic Profile		2017	2018	2019
Gender	Male	25%	27%	34%
	Female	75%	73%	65%
Age	Average	43	46	49
Marital status	Married	70%	73%	70%
	Divorced/ Separated	11%	12%	7%
	Single/ Never married	17%	13%	19%
	Widowed	2%	2%	4%
HH income	Average	\$101,010	\$98,576	\$115,594

Question text: Are you...? (Male, Female) What is your age? Are you currently...? (Married, Divorced/Separated, Widowed, Single/Never married) Which of the following categories best represents the total annual income for your household before taxes? (Less than \$35,000, \$35,000 but less than \$50,000, \$50,000 but less than \$75,000, \$75,000 but less than \$100,000, \$100,000 or more)

Travel Party Characteristics

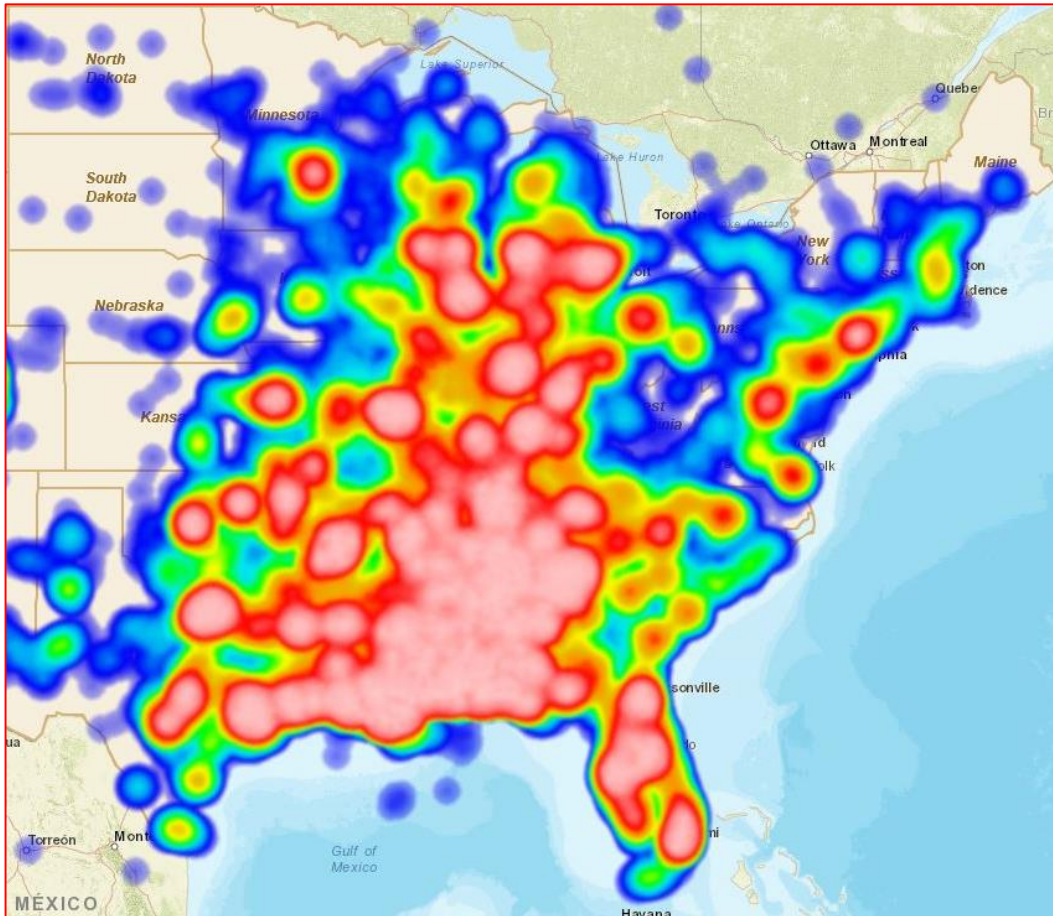
- Decision-makers for hotel stays are more likely to be male and single.
- Hotel visitors are a more ethnically diverse group; more than 10% are African-American.
- Condo renters are older and have higher incomes.
- Education is fairly similar across lodging types, and this spring saw a higher share of college grads.
- Condo renters are more likely to be retired (potentially due to larger multigenerational parties).

Spring demographic profile by lodging type		2017		2018		2019	
		Vacation rental/condo	Hotel	Vacation rental/condo	Hotel	Vacation rental/condo	Hotel
Gender	Male	21%	38%	23%	42%	26%	38%
	Female	79%	62%	77%	58%	74%	62%
Age	Average	43	41	47	40	49	47
Marital status	Married	73%	56%	76%	64%	75%	67%
	Divorced/Separated	11%	12%	12%	11%	10%	4%
	Single/Never married	15%	28%	10%	22%	11%	26%
	Widowed	1%	4%	2%	3%	4%	3%
HH income	Average	\$103,847	\$89,566	\$101,184	\$91,354	\$118,387	\$104,274
Education	College grad+	59%	57%	59%	55%	64%	61%
Occupation	Executive/upper mgmt.	8%	12%	12%	18%	15%	15%
	IT professional	3%	10%	5%	12%	5%	10%
	Educator	6%	8%	5%	5%	13%	11%
	Homemaker	14%	9%	12%	8%	14%	10%
	Student	4%	2%	3%	3%	1%	1%
	Small business owner	5%	8%	9%	9%	4%	4%
	Skilled trade/service	14%	13%	10%	11%	7%	10%
	Other	27%	18%	14%	15%	17%	14%
	Retired	16%	11%	27%	11%	24%	17%
	Not currently employed	4%	7%	3%	9%	1%	6%
Ethnicity	Caucasian/White	90%	79%	85%	80%	92%	77%
	African-American/Black	5%	13%	6%	11%	5%	15%
	Latino/Hispanic	2%	6%	5%	5%	2%	4%
	Asian	1%	4%	2%	6%	2%	6%
	American Indian	2%	2%	0%	3%	0%	0%
	Other	1%	1%	3%	1%	1%	0%

Question text: Are you...? (Male, Female) What is your age? Are you currently...? (Married, Divorced/Separated, Widowed, Single/Never married) Which of the following categories best represents the total annual income for your household before taxes? (Less than \$35,000, \$35,000 but less than \$50,000, \$50,000 but less than \$75,000, \$75,000 but less than \$100,000, \$100,000 or more) Which of the following categories represents the last grade of school you completed? (High school or less, Some college/technical school, College graduate, Post-graduate degree) What is your occupation? (Response options shown in table) What of the following best describes your ethnic heritage? Are you...? Select all that apply. (Response options shown in table)

Travel Party Characteristics

- Heat map showing source markets of spring 2019 visitors

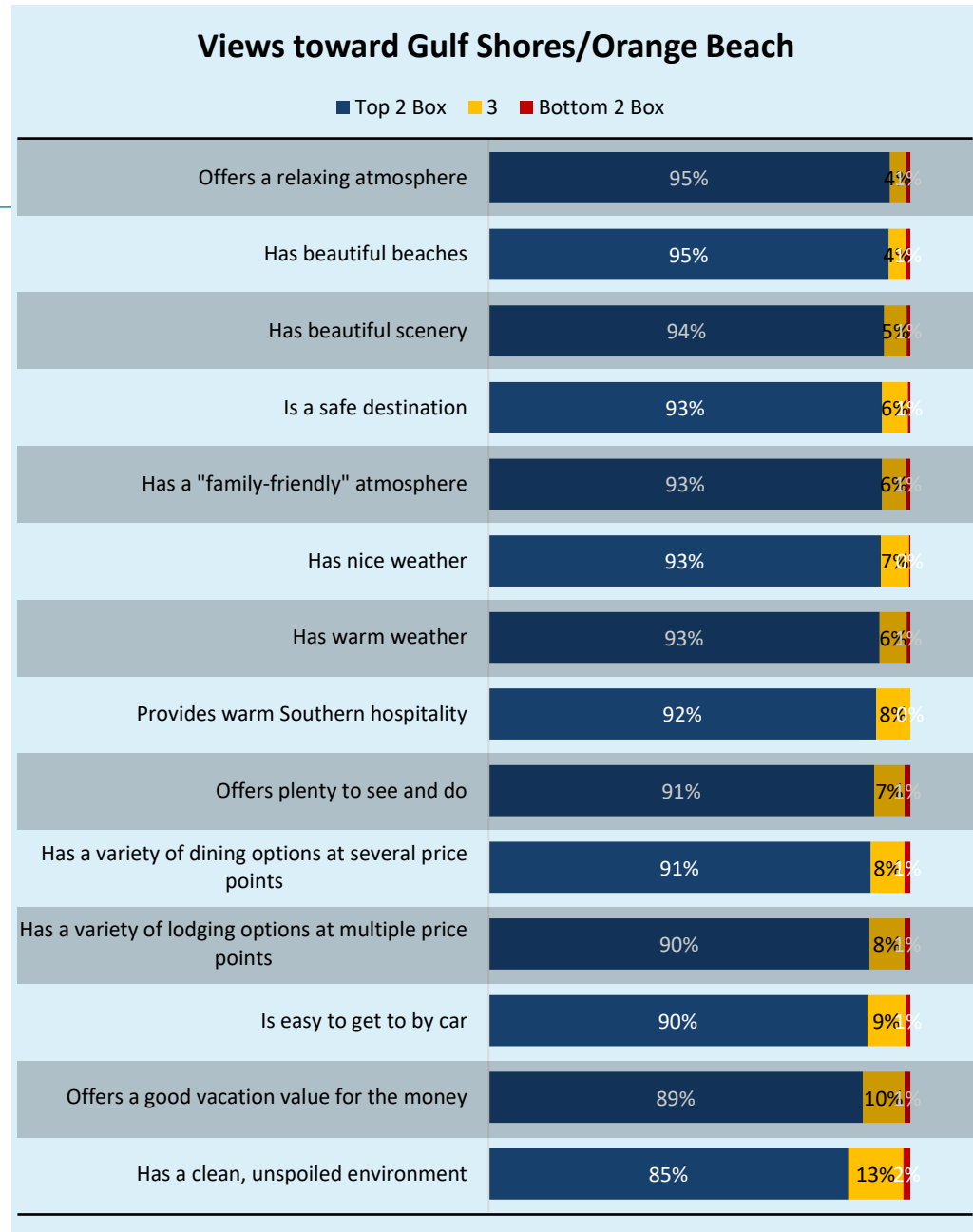


Top States of Origin	2017	2018	2019
Alabama	15%	17%	25%
Florida	12%	14%	13%
Louisiana	9%	9%	12%
Mississippi	9%	5%	9%
Texas	9%	12%	6%
Georgia	7%	7%	5%
Tennessee	7%	4%	5%
Arkansas	4%	6%	3%
Illinois	6%	3%	2%
Missouri	4%	2%	2%
Michigan	1%	3%	2%
Indiana	3%	3%	2%
Kentucky	2%	1%	2%
Wisconsin	4%	6%	1%
Ohio	4%	5%	1%
Iowa	1%	0%	0%

Views Toward GS/OB & Trip Satisfaction

- Ratings of the GS/OB destination are very positive. The highest ratings are for the relaxing atmosphere and natural beauty.
- More than 8 in 10 spring visitors agree that the statements at right describe the area (4 and 5 on a 5-point scale where 5 = describes very well).

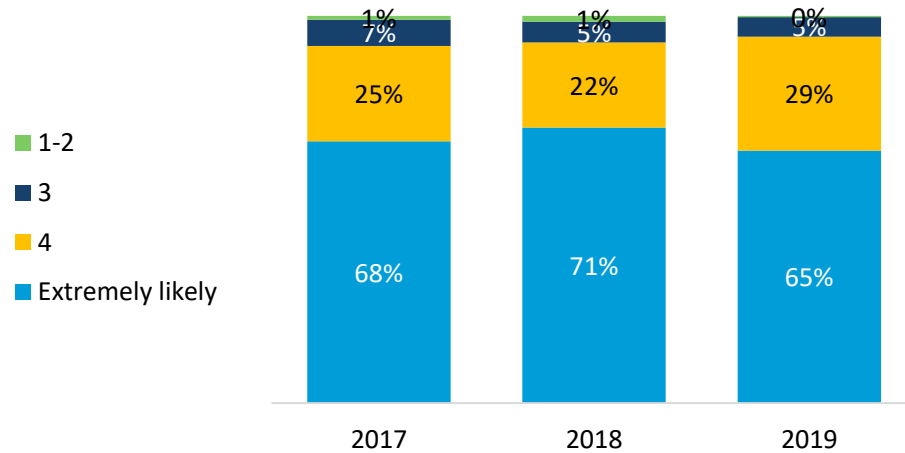
Question text: Thinking now about Gulf Shores/Orange Beach, how much do you agree that each of these statements describes the area? Response options: Does not describe at all – 1, 2, 3, 4, Describes extremely well – 5



Views Toward GS/OB & Trip Satisfaction

- Likelihood to recommend GS/OB remains very high – not surprising given the high levels of agreement with the positive image attributes.
- However, there is some slippage in the most positive response, “extremely likely to recommend.” As responses of “extremely likely” to recommend have grown among spring hotel visitors, they have declined among spring condo stayers.

Likelihood to Recommend GS/OB



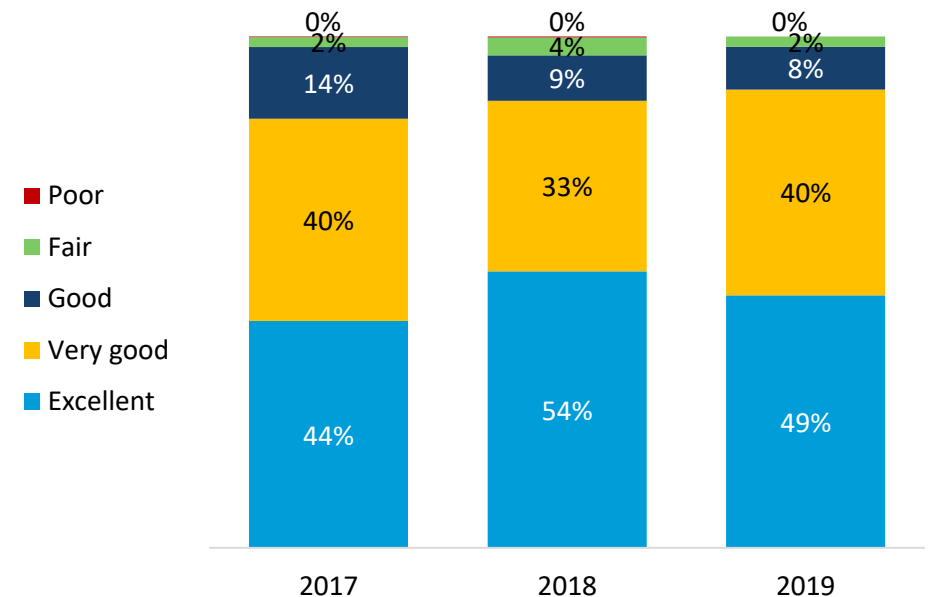
How likely are you to recommend Gulf Shores/Orange Beach to your friends or family as a destination to visit for a leisure trip?		2017	2018	2019
Vacation rental/condo	Top 2 Box	94%	94%	94%
	5 – extremely likely	71%	73%	68%
	4	23%	21%	26%
Hotel	Top 2 Box	86%	90%	96%
	5 – extremely likely	56%	64%	66%
	4	30%	26%	31%

Question text: How likely are you to recommend Gulf Shores/Orange Beach to your friends or family as a destination to visit for a leisure trip? Response options: Not at all likely – 1, 2, 3, 4, Extremely likely – 5

Views Toward GS/OB & Trip Satisfaction

- GSOBT tracks service ratings to gauge whether seasonal staffing challenges are reflected in the satisfaction metric. While nearly half of visitors rate their service as excellent, there is slippage in the measure.
- Of those who rated their service good, comments include:
 - “No complaint, but nothing special”
 - “Good but not exceptional”
 - “Could have been better but wasn’t bad”
 - “Not much service to speak of. Mostly self-service trip”
 - “Food and service were adequate.”
 - “We did not experience much service. We went to the supermarket once. We were treated normally.”
 - “I didn’t encounter excellent or above and beyond customer service. It was standard.”
 - “There is always room for improvement but overall service was good.”
- Of those who rated it fair, comments include:
 - “Not as nice as some of the beaches I have been to, but still a good community.”
 - “I’m from Florida and live by the beach. We seem to have a bit faster service even when things are busy.”
 - “The service in the restaurants used to be excellent but has fallen off in recent years.”

Overall, how would you rate the quality of the service you received at stores, restaurants, attractions, and lodging establishments in Gulf Shores/Orange Beach?



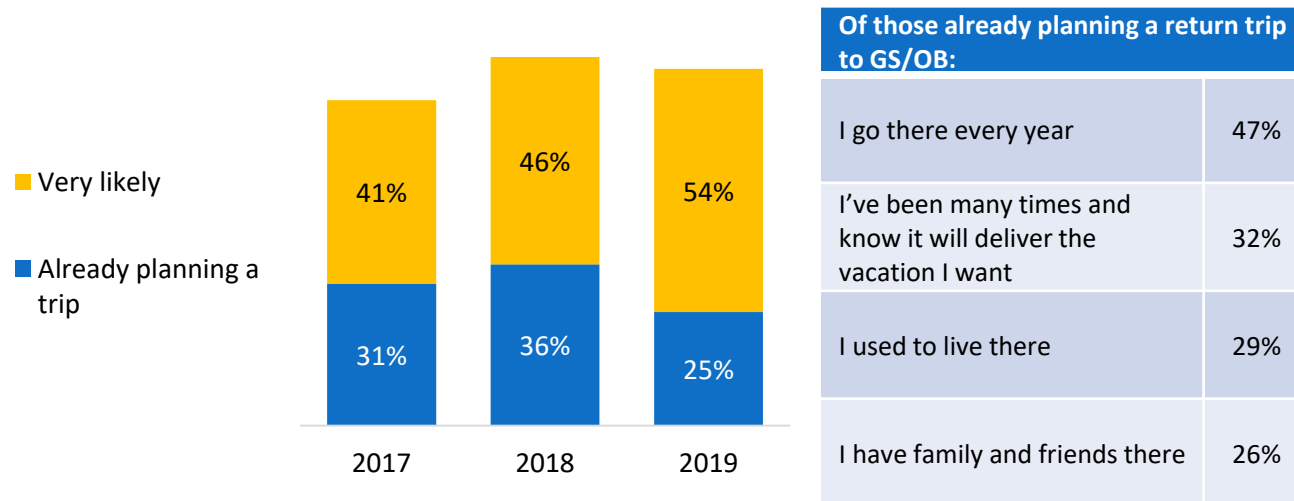
2017 n=585 (a); 2018 n=377 (b); 2019 n=428 (c)
 a / b / c indicate statistically significant differences at the 95% level.

Question text: Overall, how would you rate the quality of the service you received at stores, restaurants, attractions, and lodging establishments in Gulf Shores/Orange Beach? Response options: Poor, Fair, Good, Very good, Excellent

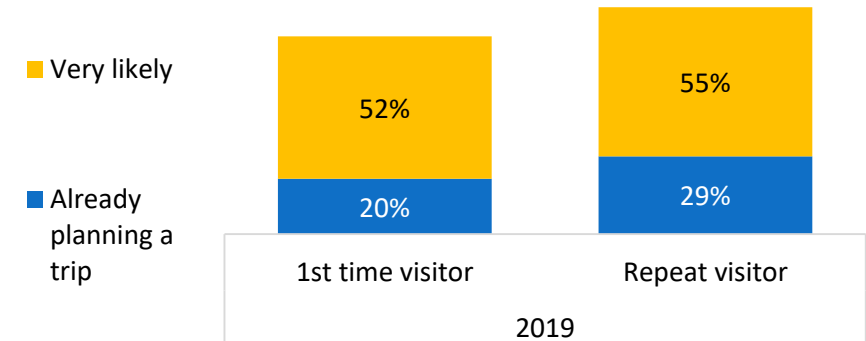
Views Toward GS/OB & Trip Satisfaction

- As with other measures of satisfaction, likelihood to return to the area remains high. More than a quarter of annual visitors and one in five repeat visitors are already planning next year's trip.
- The lower rate of planned repeat visits among first-time visitors represents an opportunity for the CVB to target new visitors with incentives designed to spur a return.

Likely to Return to GS/OB in the Next Year



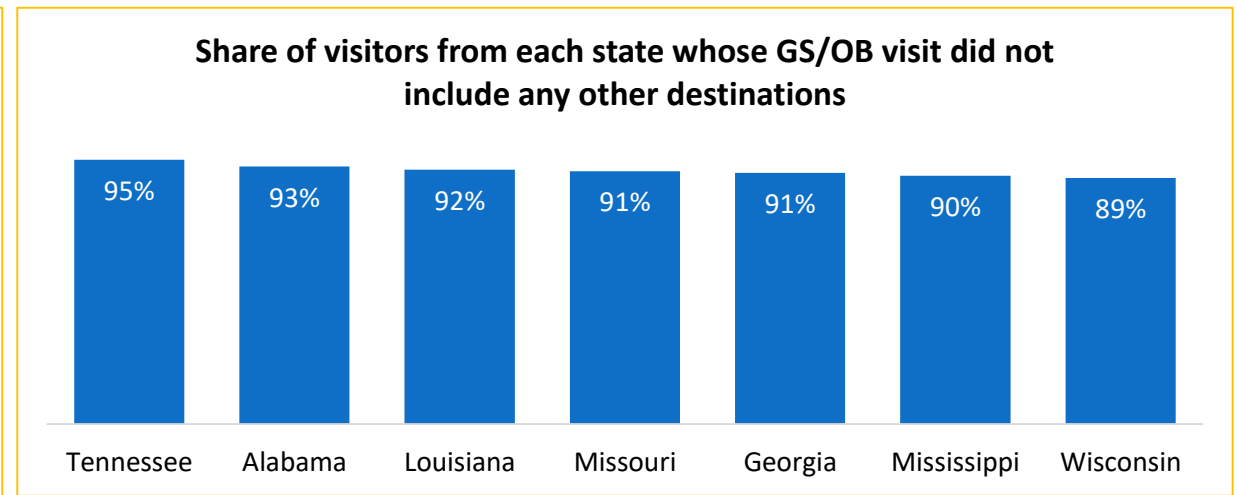
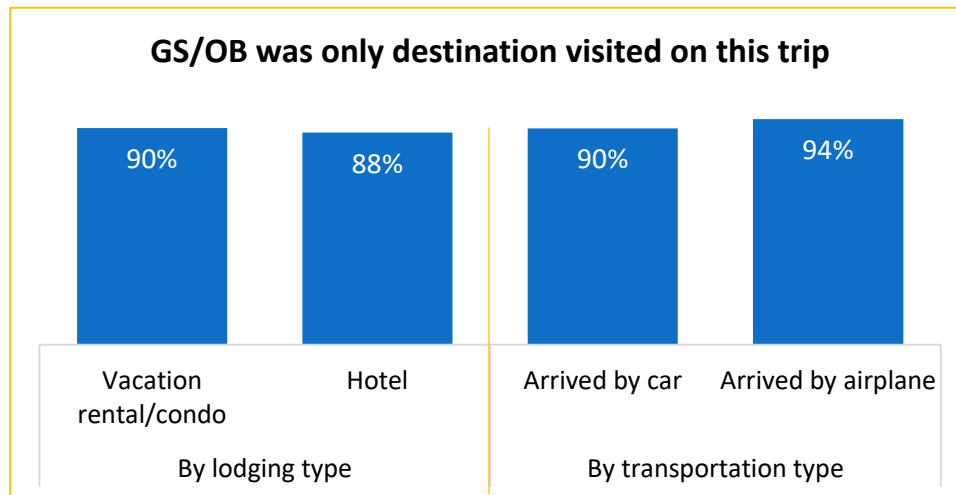
Likelihood to Visit GS/OB in the Next Year



Question text: How likely are you to visit Gulf Shores/Orange Beach in the next year? Response options: Not at all likely, Not very likely, Somewhat likely, Very likely, Already planning a trip

Destinations Visited

- Most visitors do not include other destinations during their GS/OB trip, regardless of lodging type.
- Those who arrive by car are somewhat more likely to visit other places, as are those from more distant markets. This is likely because these drives permit stops along the way.
- Other destinations visited by 3% or more of those who took side trips include New Orleans, Panama City, Biloxi, Florida, and Chattanooga.



Question text: Was Gulf Shores/Orange Beach the only destination you visited on this trip? Yes/No [IF NO] Where else did you go on this trip? Open-ended response.



Welcome Center Supplemental Analysis

Visitor Profile Research – Spring 2019

Welcome Center Impact

- When looking at data to find differences between respondent groups, it's important that we keep in mind the context of what we are looking for and apply a common-sense test – what is it reasonable to believe the Welcome Center can impact?
- For example, the Welcome Center has less opportunity to impact length of stay than it does to impact what people do and where they go during their trip. Length of leisure travel is often decided ahead of time and no matter how much visitors might like to, extending a stay is not always feasible. So when we see in the data that visitors who went to a GSOBT Welcome Center on their trip stayed about the same amount of time in the destination, this is not a surprise.
- However, Welcome Center visitors participated in more activities. This makes sense, given that activities and attractions are promoted at the centers.

Spring 2019 visits	No Welcome Center	Visited Welcome Center
Length of stay	3.5	3.6
# of activities on trip	5.3	9.1

Impact on Spending

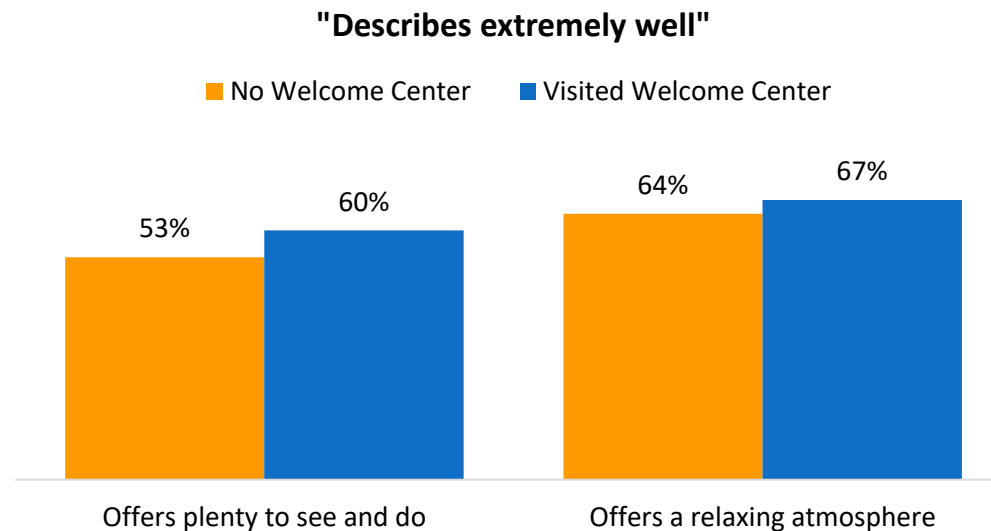
- Welcome Center visitors spent a third more money in the destination, particularly on shopping.
- Again, this makes sense. While lodging decisions and length of stay are typically decided ahead of time, shopping and entertainment are often not pre-planned when visiting a place for leisure. So Welcome Centers have more opportunity to impact these metrics.

Trip spending	No Welcome Center	Visited Welcome Center
Lodging	\$690	\$672
Meals/food/groceries	\$282	\$334
Shopping	\$135	\$345
Recreation or entertainment	\$113	\$174
Transportation within Gulf Shores	\$35	\$100
Other	\$27	\$81
Total	\$1,282	\$1,706

In terms of trip spending, “Other” is a broad category that doesn’t tend to include the same specific items from one trip to another. Examples of spending that visitors tend to include would be medical expenses, beverages if they were purchased independent of a meal, books or magazines, auto repair, etc.

Impact on Image

- Welcome Center visitors have stronger agreement with image statements related to the GS/OB leisure product.
- Spring visitor views of the area having plenty to see and do and offering a relaxing atmosphere saw the largest lift from welcome center usage.



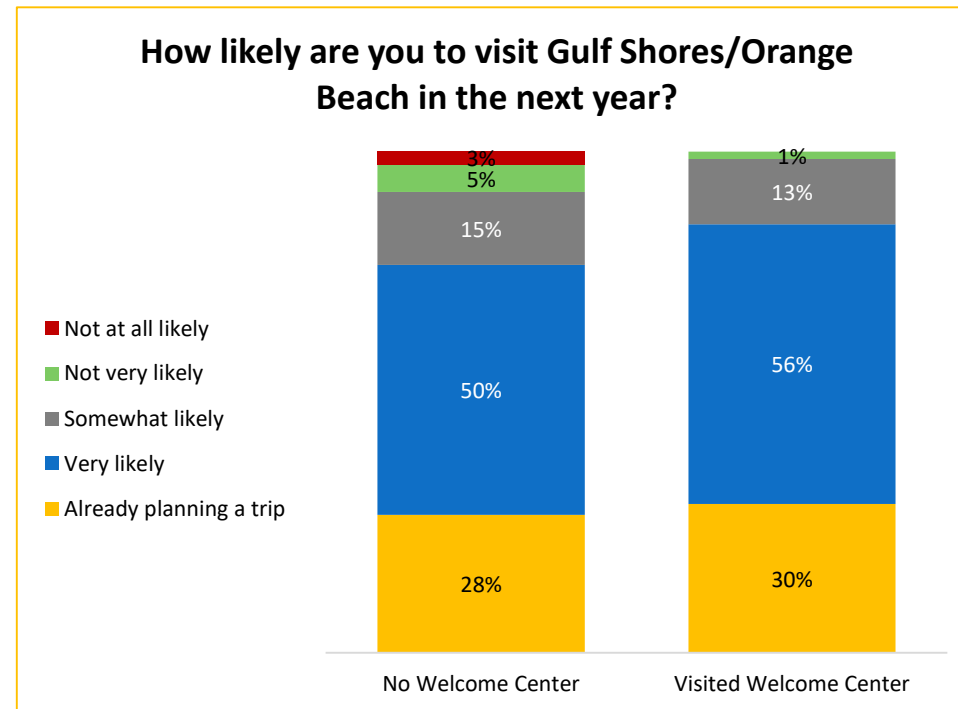
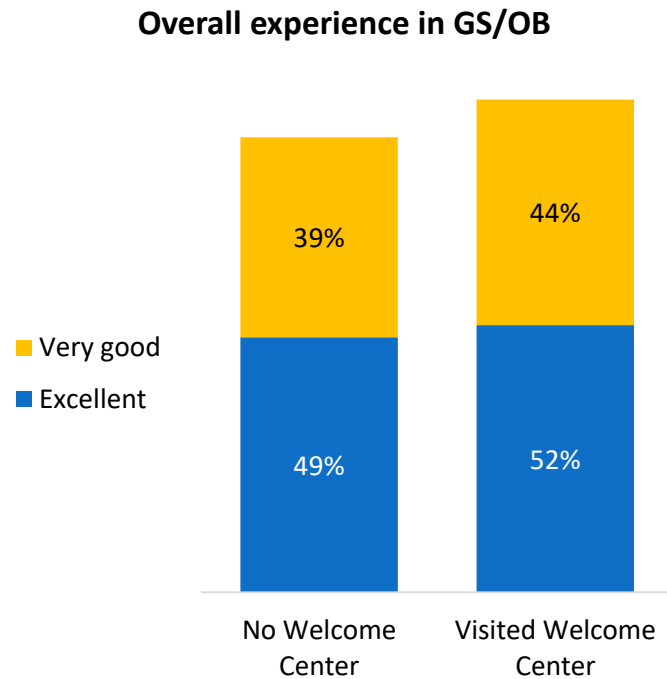
Demographic Differences

- Some of the image differences between Welcome Center visitors and non-visitors can be explained to an extent by demographic differences.
- Those who visit the centers tend to be younger, and they are slightly more likely to have kids in their travel parties.
- This is also consistent with Welcome Center visitors being newer to GS/OB and having generally more active trips in terms of activity volume.

Demographic differences		No Welcome Center	Visited Welcome Center
Age	25-35	20%	42%
	36-50	27%	33%
	51-65	33%	19%
	66+	20%	7%
Kids on trip		38%	53%

Impact on Experience and Intent to Return

- Spring visitors who used a Welcome Center are more likely to report an excellent overall experience in the destination. Welcome Center usage is associated with a higher likelihood to return.





Appendices

Visitor Profile Research – Spring 2019

Comparing Target to Other Travelers

- In prior data collection the non-target quota was divided into three cells: day trips, trips where visitors stayed overnight in non-paid lodging, and trips where visitors stayed over 30 days. Not only were there sampling challenges finding 30+ day stayers, but also dividing a sample of just 100 into three groups meant fairly low accuracy in any of the three non-target groups. Therefore, this wave of research focused the non-target quota on day trips.
- These non-target day trips exclude local residents. Visitors from Pensacola are included.
- We also employed screening questions to ensure that day visitors are coming to Gulf Shores/Orange Beach for leisure, rather than for work.

Non-target SPRING Day trips	2017 (a)	2018 (b)	2019 (c)
Average # visits/year	1.4 ^b	1.7	1.8
First time trips	36%	34%	37%

2017 day trip n=188 (a); 2018 day trip n=153 (b); 2019 day trip=160 (c)
a / b / c indicate statistically significant differences at the 95% level.

Comparing Target to Other Travelers

Began planning trip	2017		2018		2019	
	Target travelers (a)	Non-target Day trip (b)	Target travelers (c)	Non-target Day trip (d)	Target travelers (e)	Non-target Day trip (f)
< 1 week before trip	6%	25% ^{ac}	4%	31% ^{ac}	5%	49% ^e
1-2 weeks	9%	11%	12%	12%	6%	20% ^e
3 weeks - 1 month	16%	21%	24%	18%	21% ^f	11%
2 - 3 months	31% ^{bd}	21%	28% ^d	16%	32% ^f	5%
4-6 months	24% ^{bd}	9%	18% ^{bd}	10%	25% ^f	5%
6+ months	15% ^f	14% ^f	15%	12%	11%	9%

GS/OB is only destination visited on this trip	2017		2018		2019	
	Target travelers (a)	Non-target Day trip (b)	Target travelers (c)	Non-target Day trip (d)	Target travelers (e)	Non-target Day trip (f)
	88% ^b	77%	84%	80%	90%	75%

2017 target n=585 (a), day trip n=188 (b); 2018 target n=377 (c), day trip n=153 (d); 2019 target n=428 (e), day trip=160 (f)
a / b / c / d / e / f indicate statistically significant differences at the 95% level.

Question text: How far in advance did you begin planning your trip to Gulf Shores/Orange Beach? Response options as shown in graph above.
Question text: Was Gulf Shores/Orange Beach the only destination you visited on this trip? YES/NO

Comparing Target to Other Travelers

Resources used to plan GS/OB trip	2017		2018		2019	
	Target travelers (a)	Non-target Day trip (b)	Target travelers (c)	Non-target Day trip (d)	Target travelers (e)	Non-target Day trip (f)
Family or friends	37% ^d	31%	32%	48%	28%	31%
Hotel websites	22%	25% ^d	17%	20%	24% ^f	11%
Booking websites or apps	22% ^d	16% ^d	19% ^d	16%	21% ^f	11%
Travel blogs	7%	6%	5%	10%	7%	11%
Travel advice websites or apps	12%	15%	11%	12%	10%	10%
Gulf Shores & Orange Beach Tourism website	25% ^{cbd}	9%	14%	17%	24% ^f	8%
Social media	14% ^d	18% ^d	16% ^d	16%	15% ^f	8%
Magazine and newspaper articles	3%	6%	5%	3%	3%	7% ^e
Traveler review sites or apps	17% ^b	10%	12%	11%	26% ^f	6%
Vacation home rental booking sites/apps	35% ^{bd}	9%	33% ^{bd}	14%	36% ^f	5%
Travel/visitor guide	12%	12%	8%	14%	17% ^f	5%
Alabama's official tourism website	12% ^{bd}	5%	12% ^{bd}	9%	13% ^f	4%
Local vacation rental company sites	17% ^{bd}	7%	12%	11%	16% ^f	4%

Question text: Which of the following resources did you use to plan your trip to Gulf Shores/Orange Beach? Response options as shown in table.

2017 target n=585 (a), day trip n=188 (b); 2018 target n=377 (c), day trip n=153 (d); 2019 target n=428 (e), day trip=160 (f)
a / b / c / d / e / f indicate statistically significant differences at the 95% level.

Comparing Target to Other Travelers

Children on trip	2017		2018		2019	
	Target travelers (a)	Non-target Day trip (b)	Target travelers (c)	Non-target Day trip (d)	Target travelers (e)	Non-target Day trip (f)
% of trips with children	34% ^{bd}	24% ^{ac}	33% ^{bd}	37% ^{ac}	42%	34%
Of trips with children:	<i>2017 target n=70, day trip n=3; 2018 target n=56, day trip n=10; 2019 target n=177, day trip n=33</i>					
< 6 years old	23% ^c	19% ^c	38% ^{ab}	29%	48%	33%
6-11 years old	44%	54%	40%	53%	40%	64% ^e
12-17 years old	52% ^d	54% ^d	59% ^d	29% ^{ac}	49%	36%

Question text: Who traveled with you on this trip? Select all that apply. Response options: Spouse/Partner, Adult friends/relatives, Children under 18 [shown], Sports team, Business associates, Other, specify.
 Question text: [IF CHILDREN UNDER 18 SELECTED] What ages were the children in your travel party? Response options as shown in table.

Mode of travel to GS/OB	2017		2018		2019	
	Target travelers (a)	Non-target Day trip (e)	Target travelers (c)	Non-target Day trip (g)	Target travelers (e)	Non-target Day trip (f)
Automobile	87% ^{eg}	71%	83%	71%	84%	85%
Airplane	10%	22% ^a	14%	19%	11%	14%
Other	3%	7% ^f	4%	10% ^{af}	5%	1%

How did you get to Gulf Shores/Orange Beach for your trip? Select the one mode of transportation that you used to travel the most miles for this trip.

2017 target n=585 (a), day trip n=188 (b); 2018 target n=377 (c), day trip n=153 (d); 2019 target n=428 (e), day trip n=160 (f)
 a / b / c / d / e / f indicate statistically significant differences at the 95% level.

Comparing Target to Other Travelers

	2017		2018		2019	
	Target travelers (a)	Non-target Day trip (e)	Target travelers (c)	Non-target Day trip (g)	Target travelers (e)	Non-target Day trip (f)
Travel Party Size	4.0	2.7	3.4	2.9	3.8 ^f	2.7

Trip spending	2017		2018		2019	
	Target travelers (a)	Non-target Day trip (b)	Target travelers (c)	Non-target Day trip (d)	Target travelers (e)	Non-target Day trip (f)
Lodging	\$903 ^{bd}	\$0	\$809 ^{bd}	\$0	\$842	\$0
Meals/food/groceries	\$325 ^{cb}	\$175	\$284 ^{bd}	\$127	\$340 ^f	\$134
Shopping	\$206 ^c	\$142	\$186	\$136	\$214 ^f	\$105
Recreation or entertainment	\$169 ^{cd}	\$174	\$164	\$86	\$144 ^f	\$76
Transportation within Gulf Shores	\$55 ^c	\$52	\$90	\$60	\$45	\$78 ^e
Other	\$27	\$30	\$26 ^d	\$24	\$41	\$44
TOTAL	\$1,685	\$573	\$1,558	\$434	\$1,626	\$436
Per person spending	\$421	\$210^{fh}	\$459	\$151	\$432	\$160

2017 target n=585 (a), day trip n=188 (b); 2018 target n=377 (c), day trip n=153 (d); 2019 target n=428 (e), day trip=160 (f)
a / b / c / d / e / f indicate statistically significant differences at the 95% level.

Question text: To help us better understand the economic impact of tourism, what was the approximate amount of money your travel party spent while in Gulf Shores/Orange Beach on your trip? [Category prompts]
Including yourself, how many people were in your travel party?

Comparing Target to Other Travelers

Demographics		2017		2018		2019	
		Target travelers (a)	Non-target Day trip (b)	Target travelers (c)	Non-target Day trip (d)	Target travelers (e)	Non-target Day trip (f)
Gender	Male	25%	26%	27%	27%	34%	34%
	Female	75%	74%	73%	73%	65%	65%
Age	Average	43	41	46	41	49	54
Marital status	Married	70% ^d	59%	73% ^d	54%	70%	75%
	Single	29%	26%	25%	25%	26%	18%
	Other	2%	15%	2%	20%	4%	7%
HH income	Average	\$101,010	\$74,364	\$98,576	\$74,118	\$115,594	\$96,292

2017 target n=585 (a), day trip n=188 (b); 2018 target n=377 (c), day trip n=153 (d); 2019 target n=428 (e), day trip=160 (f)
a / b / c / d / e / f indicate statistically significant differences at the 95% level.

Question text: Are you...? (Male, Female) What is your age? Are you currently...? (Married, Divorced/Separated, Widowed, Single/Never married) Which of the following categories best represents the total annual income for your household before taxes? (Less than \$35,000, \$35,000 but less than \$50,000, \$50,000 but less than \$75,000, \$75,000 but less than \$100,000, \$100,000 or more)

Comparing Target to Other Travelers

Top 2 Box	2017		2018		2019	
	Target travelers (a)	Non-target Day trip (b)	Target travelers (c)	Non-target Day trip (d)	Target travelers (e)	Non-target Day trip (f)
Offers a relaxing atmosphere	91% ^{bd}	79%	92% ^{bd}	79%	95%	89%
Is easy to get to by car	90% ^{bd}	77%	88% ^{bd}	77%	90%	87%
Has beautiful beaches	90% ^{bd}	79%	92% ^{bd}	79%	95%	94%
Has a "family-friendly" atmosphere	89% ^{bd}	79%	96% ^{abd}	77%	93%	90%
Is a safe destination	89% ^{bd}	81%	92% ^{bd}	78%	93%	92%
Has a clean, unspoiled environment	82% ^b	73%	83% ^{bd}	73%	85%	93%
Offers plenty to see and do	88% ^{bd}	74%	89% ^{bd}	74%	91%	83%
Has nice weather	90% ^{bd}	82%	93% ^{bd}	81%	93%	90%
Provides warm Southern hospitality	89% ^{bd}	78%	90% ^{bd}	78%	92%	88%
Has a variety of dining options at several price points	84% ^{bd}	70%	89% ^{bd}	75%	91%	88%
Has a variety of lodging options at multiple price points	81% ^{bd}	72%	89% ^{bd}	67%	90%	81%
Has beautiful scenery	89% ^{bd}	81%	93% ^{bd}	77%	94%	95%
Has warm weather	91% ^{bd}	84%	94% ^{bd}	78%	93%	93%
Offers a good vacation value for the money	91% ^{bd}	75%	90% ^{bd}	73%	89%	81%

Question text: Thinking now about Gulf Shores/Orange Beach, how much do you agree that each of these statements describes the area? Response options: Does not describe at all – 1, 2, 3, 4, Describes extremely well – 5

2017 target n=585 (a), day trip n=188 (b); 2018 target n=377 (c), day trip n=153 (d); 2019 target n=428 (e), day trip=160 (f)
a / b / c / d / e / f indicate statistically significant differences at the 95% level.

Comparing Target to Other Travelers

Overall Experience	2017		2018		2019	
	Target travelers (a)	Non-target Day trip (b)	Target travelers (c)	Non-target Day trip (d)	Target travelers (e)	Non-target Day trip (f)
Top 2 Box Rating	87%^{bd}	64%	87%^{bd}	63%	91%	83%
5 (Excellent)	46% ^b	25%	46% ^{abd}	39% ^b	51%	46%
4 (Very good)	41% ^{cd}	39% ^d	41%	24%	40%	37%
3 (Good)	12%	27% ^{ac}	12%	27% ^{ac}	7%	15% ^e
2 (Fair)	1%	7% ^{ac}	1%	8% ^{ac}	1%	1%
1 (Poor)	0%	2%	0%	2%	0%	1%

Likelihood to Recommend	2017		2018		2019	
	Target travelers (a)	Non-target Day trip (b)	Target travelers (c)	Non-target Day trip (d)	Target travelers (e)	Non-target Day trip (f)
Top 2 Box Rating	92%^{bd}	74%	93%^{bd}	73%	95%	87%
5 (Extremely likely)	68% ^{bd}	43%	71% ^{bd}	51%	65%	58%
4	25%	31% ^d	22%	22%	29%	29%
3	7%	20% ^{ac}	5%	18% ^{ac}	5%	12%
2	1%	4%	1%	5% ^a	0%	0%
1 (Not at all likely)	0%	3% ^{ac}	0%	4% ^{ac}	0%	1%

2017 target n=585 (a), day trip n=188 (b); 2018 target n=377 (c), day trip n=153 (d); 2019 target n=428 (e), day trip=160 (f)
a / b / c / d / e / f indicate statistically significant differences at the 95% level.

Question text: Thinking about your overall experience in Gulf Shores/Orange Beach during your trip, would you say it was...? Response options: Poor, Fair, Good, Very good, Excellent

Question text: How likely are you to recommend Gulf Shores/Orange Beach to your friends or family as a destination to visit for a leisure trip? Response options: Not at all likely – 1, 2, 3, 4, Extremely likely – 5

Comparing Target to Other Travelers

Likelihood to Visit Again in the Next Year	2017		2018		2019	
	Target travelers (a)	Non-target Day trip (b)	Target travelers (c)	Non-target Day trip (d)	Target travelers (e)	Non-target Day trip (f)
Likely to Return (top 2 box)	72%	72%	83%^{abd}	82%	79%	73%
5 (Already planning a trip)	31% ^{bd}	31%	28% ^{bd}	36%	25%	28%
4 (Very likely)	41%	41%	54%	46%	54%	46%
3 (Somewhat likely)	23% ^c	23% ^c	11%	13% ^c	16%	16%
2 (Not very likely)	3%	3%	3%	5%	4%	7%
1 (Not at all likely)	2%	2% ^c	3%	0% ^c	1%	4%

During which season(s) would you be most likely to visit (of those likely to visit)	2017		2018		2019	
	Target travelers (a)	Non-target Day trip (b)	Target travelers (c)	Non-target Day trip (d)	Target travelers (e)	Non-target Day trip (f)
Spring	53% ^{bd}	32%	48% ^{bd}	35%	59%	54%
Summer	51%	58%	53%	60%	52%	47%
Fall	33%	31%	31%	36%	29%	37%
Winter	11%	9%	15%	11%	9%	14%

2017 target n=585 (a), day trip n=188 (b); 2018 target n=377 (c), day trip n=153 (d); 2019 target n=428 (e), day trip=160 (f)

a / b / c / d / e / f indicate statistically significant differences at the 95% level.

Question text: How likely are you to visit Gulf Shores/Orange Beach in the next year? Response options: Not at all likely, Not very likely, Somewhat likely, Very likely, Already planning a trip

Question text: [IF SOMEWHAT LIKELY OR ABOVE] During which season(s) would you be most likely to visit? Select all that apply. Response options: Spring, Summer, Fall, Winter

Comparing Target to Other Travelers

Top States of Origin	2017		2018		2019	
	Target travelers (a)	Non-target Day trip (b)	Target travelers (c)	Non-target Day trip (d)	Target travelers (e)	Non-target Day trip (f)
Alabama	15%	12%	17%	10%	20%	28%
Florida	12%	29% ^{ac}	14%	31% ^{ac}	10%	19%
Illinois	6%	4%	3%	3%	7%	11%
Texas	9%	18% ^a	12%	16%	10%	10%
Mississippi	9%	5%	5%	5%	6%	8%
Georgia	7%	6%	7%	5%	12%	7%
Louisiana	9% ^{bd}	3%	9% ^e	4%	8%	4%
Michigan	1%	3%	3%	3%	5%	4%
Tennessee	7%	3%	4%	5%	7%	2%
Indiana	3%	2%	3%	3%	5%	2%
Wisconsin	4% ^b	1%	6% ^{bd}	2%	3%	2%
Missouri	4%	6%	2%	3%	6%	1%
Ohio	4%	2%	5%	3%	1%	0%
Arkansas	4% ^b	1%	6% ^{bd}	1%	0%	0%
Kentucky	2%	2%	1%	1%	0%	0%
Iowa	1%	1%	0%	1%	0%	0%

2017 target n=585 (a), day trip n=188 (b); 2018 target n=377 (c), day trip n=153 (d); 2019 target n=428 (e), day trip=160 (f)
a / b / c / d / e / f indicate statistically significant differences at the 95% level.

Comparing Non-Target Trips Year-Over-Year

General Activities SPRING	2017		2018		2019	
	Target travelers (a)	Non-target Day trip (b)	Target travelers (c)	Non-target Day trip (d)	Target travelers (e)	Non-target Day trip (f)
Dining out	60% ^{bd}	38% ^d	48% ^d	23%	68%	32%
Beaches	72% ^{bd}	49% ^d	61% ^{bd}	35%	75%	31%
Relaxing	63% ^{bd}	41% ^d	57% ^{bd}	23%	60%	30%
Sightseeing	37% ^{bd}	23% ^d	22%	14%	39%	19%
Shopping	44% ^{bd}	26%	36%	27%	53%	18%
Swimming	53% ^{bd}	25%	36% ^{bd}	20%	47%	15%
Shelling	24% ^{bd}	11% ^d	19% ^{bd}	5%	17%	11%
Exercise/Working out	10% ^d	6%	10%	5%	12%	8%
Visiting friends/relatives who live in the area	11%	10%	13%	8%	9%	13%
Fishing	17% ^b	9%	11%	10%	17%	6%
Historical sites	16% ^{bd}	6%	11%	8%	12%	6%
Hiking on trails	10% ^d	11% ^d	7%	3%	15%	6%
Visiting a spa	5%	6%	4%	4%	6%	6%
Photography	17% ^d	15% ^d	15% ^d	7%	13%	6%
Watching wildlife	14%	13%	17% ^d	8%	11%	5%
Parasailing/Jet skiing	5% ^b	1%	4%	3%	6%	4%
Dolphin tour	13% ^d	9%	6%	5%	11%	4%
Bicycle riding	6%	5%	9%	7%	8%	4%
Sporting events	2%	2%	2%	1%	4%	4%
Boating or sailing	6%	5%	8%	4%	10%	4%
Scuba diving/Snorkeling	5%	4%	3%	3%	6%	4%
Golfing	5%	1%	5%	3%	5%	4%
Festivals or special events (non-sports events)	5% ^d	4%	7% ^d	1%	6%	4%
Birdwatching	4%	5%	9%	10%	4%	4%
Tennis	2%	2%	5%	1%	2%	4%
Concerts and nightlife	19% ^{bd}	11%	17% ^d	8%	11%	3%
Kayaking/Canoeing/Paddle boarding	6%	3%	4%	3%	7%	2%

Question text: What attractions and activities did you visit or participate in while in Gulf Shores/Orange Beach on your trip? Response options as shown in tables above.

2017 target n=585 (a), day trip n=188 (b); 2018 target n=377 (c), day trip n=153 (d); 2019 target n=428 (e), day trip=160 (f) a / b / c / d / e / f indicate statistically significant differences at the 95% level.

Comparing Non-Target Trips Year-Over-Year

Specific Attractions SPRING	2017		2018		2019	
	Target travelers (a)	Non-target Day trip (b)	Target travelers (c)	Non-target Day trip (d)	Target travelers (e)	Non-target Day trip (f)
Adventure Island	9%	5%	4%	4%	7%	3%
Alabama Gulf Coast Zoo	6%	4%	7%	4%	13%	7%
Alabama's Coastal Connection Scenic Byway	11% ^b	6%	9%	5%	9%	6%
Battleship USS Alabama	11% ^b	5%	6%	5%	11%	10%
Bellingrath Gardens	2%	2%	2%	1%	3%	3%
Bon Secour National Wildlife Refuge	4%	2%	2%	2%	5%	0%
Dauphin Island	13%	7%	10%	7%	12%	10%
Fort Morgan Historic Site	9% ^b	3%	5%	5%	12%	5%
Gulf State Park	17% ^b	9%	9%	5%	19%	4%
Hugh S. Branyon Backcountry Trail	1%	2%	3%	1%	0%	1%
National Naval Aviation Museum	7%	4%	1%	4%	6%	6%
OWA Park	3%	3%	3%	0%	3%	9%
Tanger Outlets	21% ^b	8%	17% ^d	8%	35%	16%
The Track	9% ^b	4%	3%	2%	3%	3%
The Wharf	20% ^b	6%	9% ^d	1%	21%	6%
Waterville	6%	2%	1%	1%	4%	3%

2017 target n=585 (a), day trip n=188 (b); 2018 target n=377 (c), day trip n=153 (d); 2019 target n=428 (e), day trip=160 (f)
a / b / c / d / e / f indicate statistically significant differences at the 95% level.

Question text: What attractions and activities did you visit or participate in while in Gulf Shores/Orange Beach on your trip? Response options as shown in tables above.