



**GULF SHORES &
ORANGE BEACH
TOURISM**

Alabama's White-Sand Beaches

Visitor Profile Research

Fall 2021

Strategic Marketing & Research Insights LLC

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Introduction

Visitor Profile Research – Fall 2021

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 remains 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 first 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. This report is the third of four seasonal reports for 2021.
- The COVID-19 pandemic brought with it global disruptions to travel. While there has generally been a recovery, leisure travel has remained low globally since spring 2020. Even in areas where travel volume has picked up, there have been changes in the travel landscape in terms of who is traveling, how people plan, and what leisure activities they choose. On the heels of the Delta variant in late Summer 2021, the highly contagious Omicron variant brought about another surge in cases and renewed concerns about leisure travel in Fall 2021.
- Weather also impacts visitation and satisfaction. After two hurricanes made landfall in Fall 2020, Fall 2021 had a better weather outlook.

Research Objectives



Gather information on Fall 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 prior Falls



Explore new visitors to the area, to identify demographic and motivational differences compared to repeat visitors



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 Fall 2021 (September through November).
- 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 in Fall 2021 was 80% condo/vacation rentals and 20% hotel stays.
- Surveys were conducted in the markets that Arrivalist's mobile data indicated were home markets for devices that spent time in the Gulf Shores/Orange Beach area during the Fall months.

Number of trips represented in the data	Fall 2021
Target trips (stayed 1-30 nights in paid accommodations)	408
Non-target trips (visited but did not stay overnight)	104



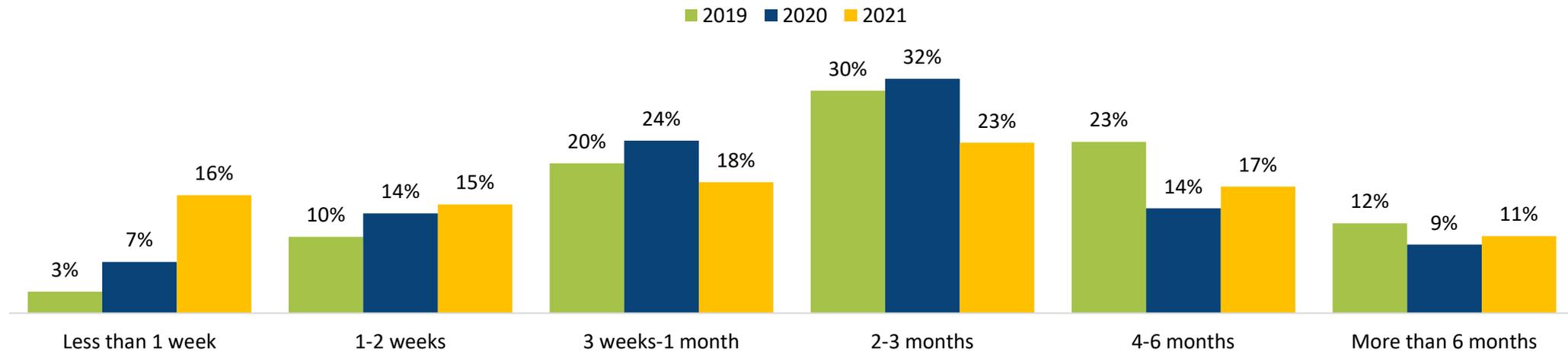
Detailed Findings

Visitor Profile Research – Fall 2021

Travel Planning

- In Fall 2020, trip planning localized at between 3 weeks and 3 months ahead of GS/OB visits. And this was not very different from pre-pandemic trip planning.
- This Fall, however, trip planning was much more spread out. While the largest group – just under a quarter – planned 2-3 months ahead of their visit, there were nearly as many planning a week ahead as one month ahead.
- Long-term planning of more than 6 months ahead of travel is in line with pre-pandemic behavior.

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

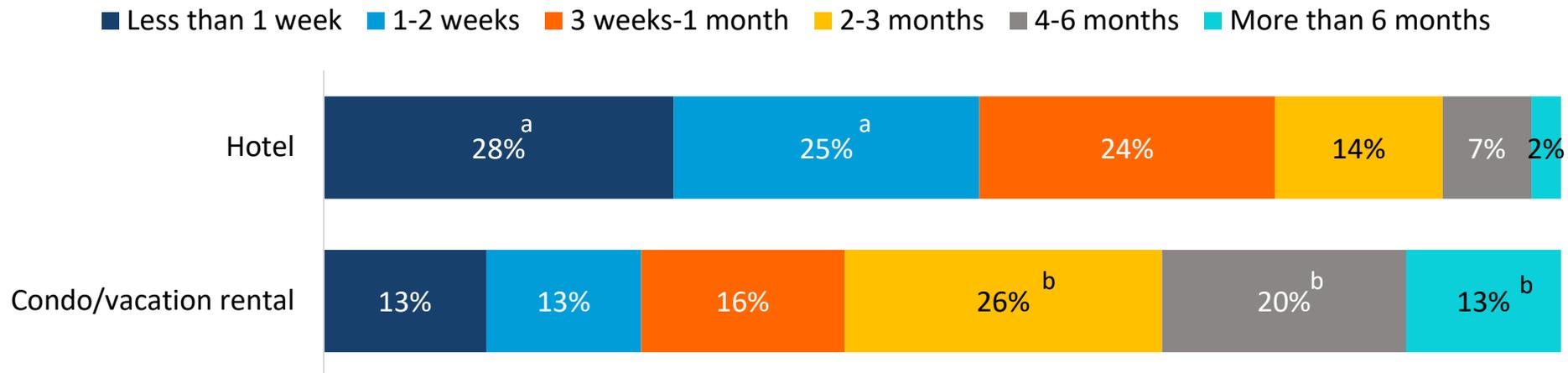


Question text: How far in advance did you begin planning your trip to Gulf Shores/Orange Beach? Response options as shown in graph above.

Travel Planning – Hotel vs. Condo Rental

- As we continue to see, condo stayers plan their GS/OB trips farther in advance than hotel stayers. Condo stayers tend to be repeat visitors.

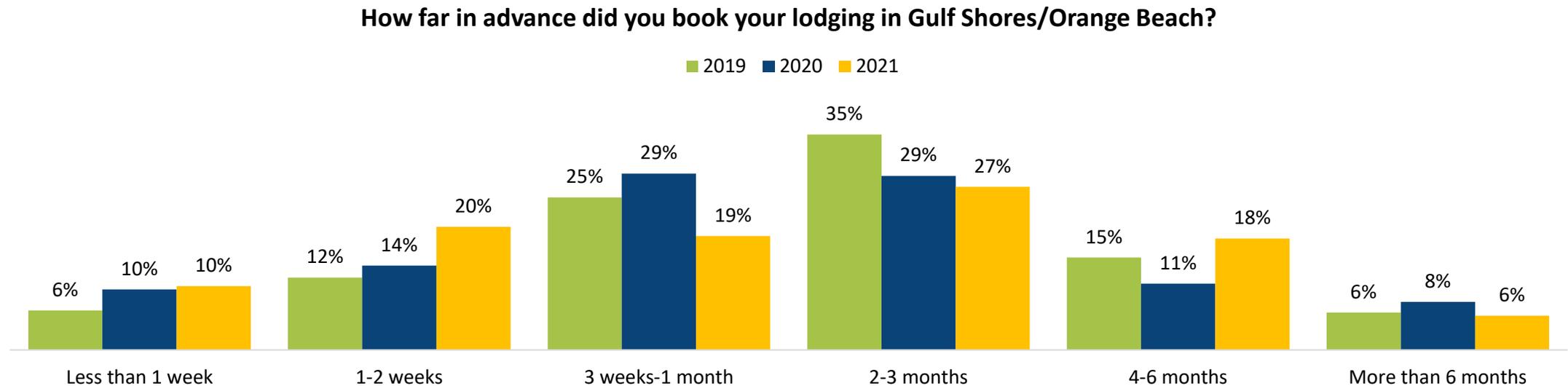
Fall Trip Planning Horizon by Lodging Type



Vacation rental/condo n=152 (a); Hotel/motel n=256 (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 – Lodging

- As with trip planning, lodging booking is more spread out than in past Falls. A quarter of Fall visitors booked accommodations 2-3 months before visiting GS/OB.
- There are nearly as many who booked 4-6 months in advance as 1-2 weeks out.

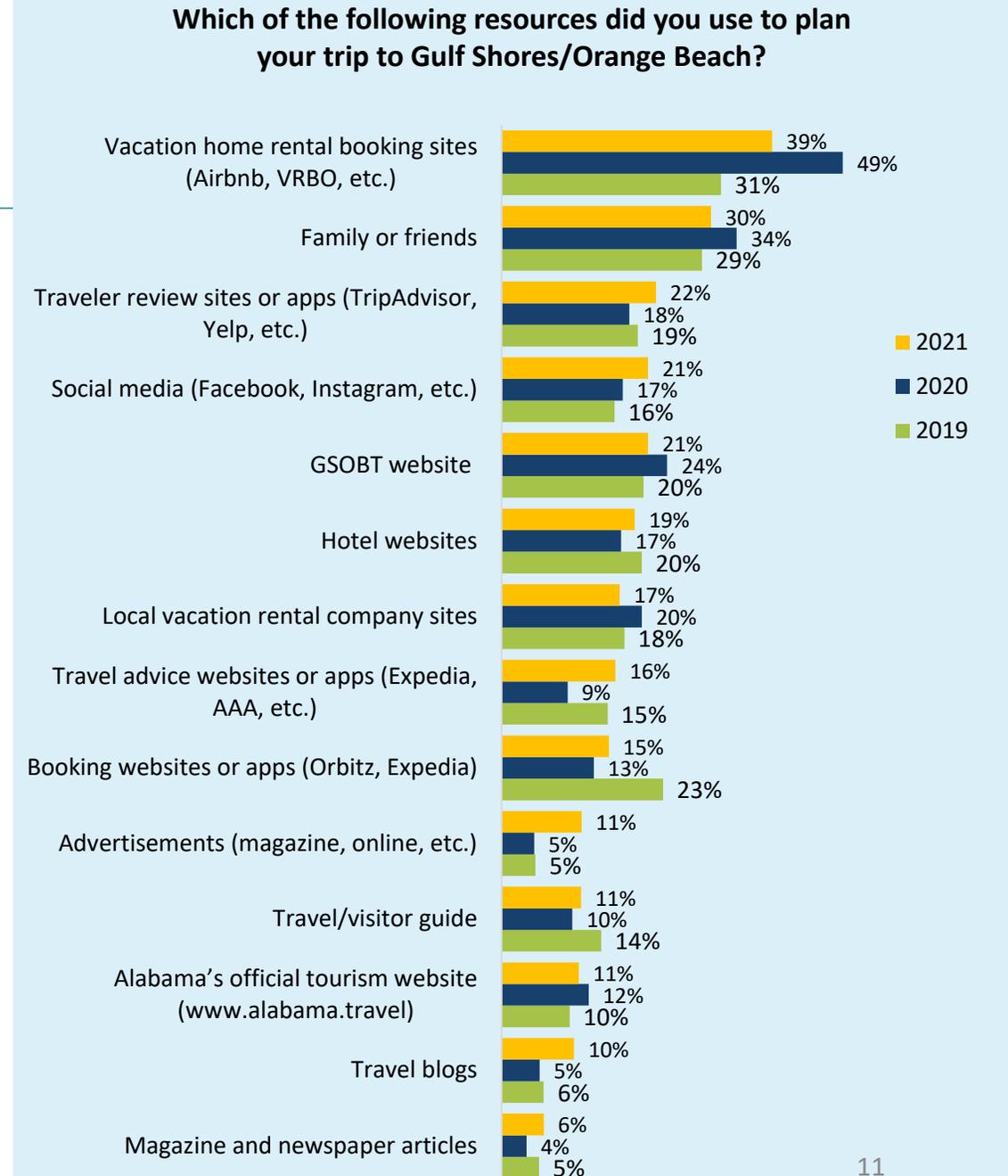


Question text: How far in advance did you book your lodging in Gulf Shores/Orange Beach? Response options as shown in graph.

Travel Planning – Resources

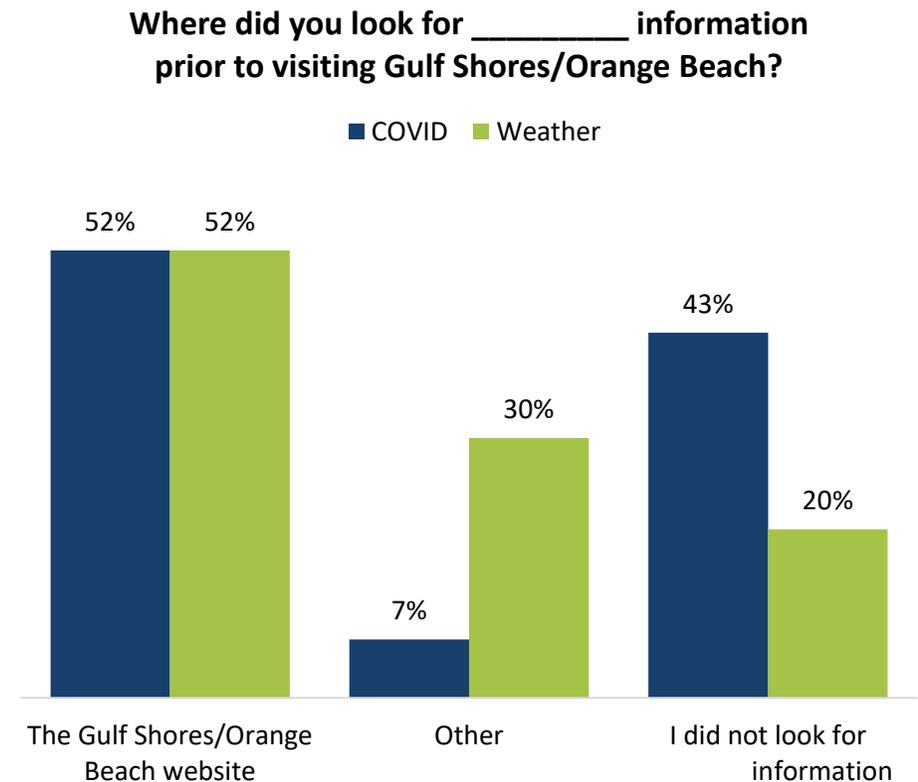
- Travel planning resources used in Fall 2021 look more like pre-pandemic research.
- Vacation home rental sites lead, followed by family and friends, traveler review sites, social media and the GSOBT website.
- This year – as pre-pandemic – there were more resources used.

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.



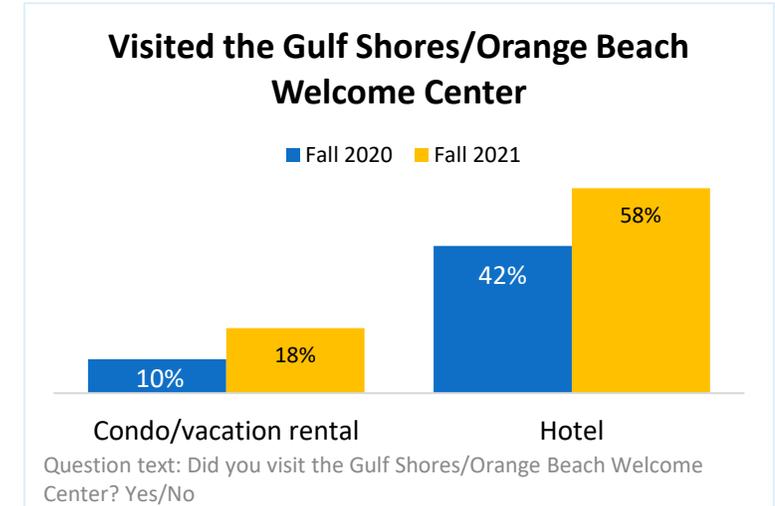
Travel Planning – GSOBT Website

- Nearly 60% of Fall visitors looked specifically for COVID information prior to visiting. Most of them consulted the GSOBT website. Others looked to CDC or other public health sources, accommodations websites or asked friends and family.
- A higher share of visitors looked for weather information than COVID information before visiting. Again, the GSOBT website was the main information source. Others also looked at weather.com and other weather-specific websites and apps.



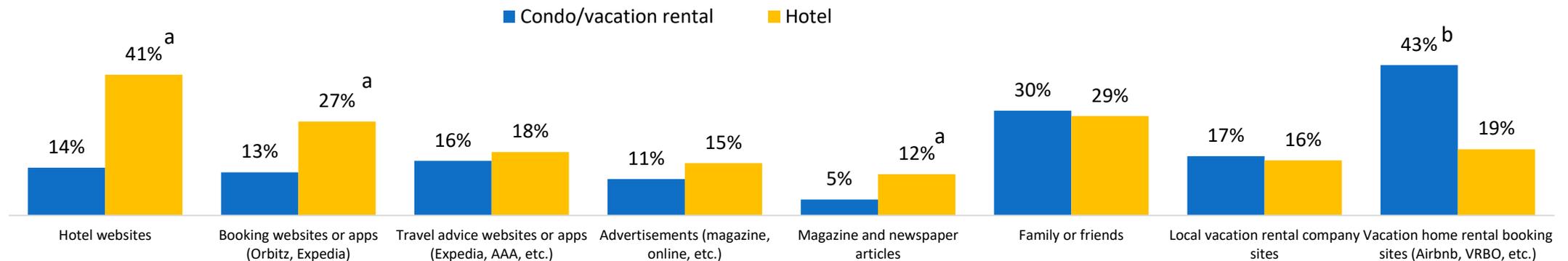
Travel Planning – Hotel vs. Condo Rental

- Condo stayers are more likely to use vacation home rental booking sites. While these visitors remain less likely than hotel stayers to visit a welcome center, they were more likely this year than in Fall 2020 to visit the welcome center.
- Hotel stayers also visited the welcome center more this year than last. This represents three consecutive Fall seasons with increased welcome center usage among these visitors.



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Trip planning resources with biggest difference by lodging type



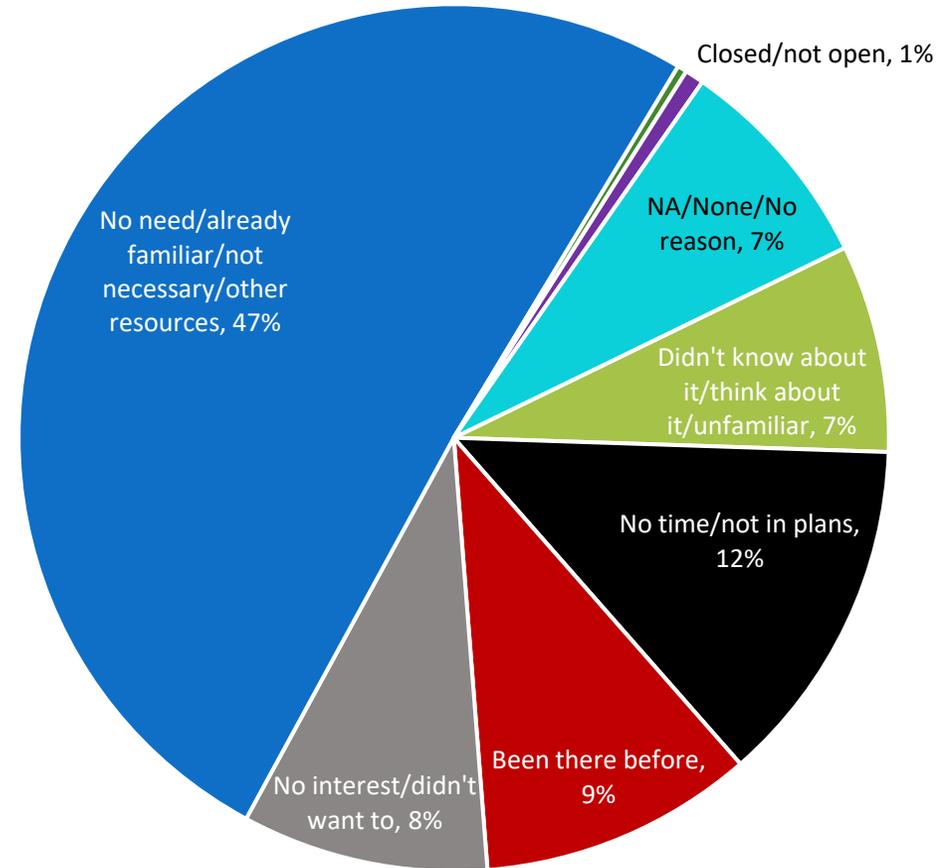
Vacation rental/condo n=152 (a); Hotel/motel n=256 (b); a / b indicate statistically significant differences at the 95% level.

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

- Of those who did not visit a Welcome Center, the most common reason remains already being familiar with the destination.

Why didn't you visit the Welcome Center?

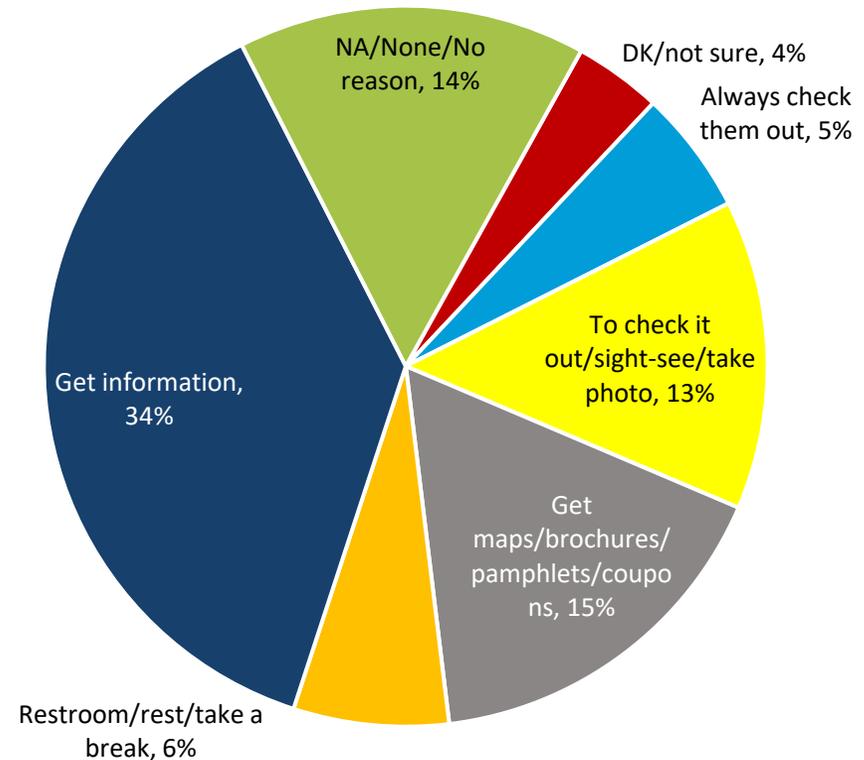


Question text: Why didn't you visit the welcome center? [Open ended response]

Travel Planning – Welcome Center Visitors

- The main reason for stopping at a GSOBT Welcome Center was to get information.
- This is consistent with less-familiar visitors using the Welcome Centers.
- Hotel stayers, more of whom are newer, less familiar visitors, use the welcome centers at a higher rate. But this Fall there were more visitors who used the centers regardless of lodging type. There may be interest in finding out what experiences are available in the wake of COVID-related closures and limitations.

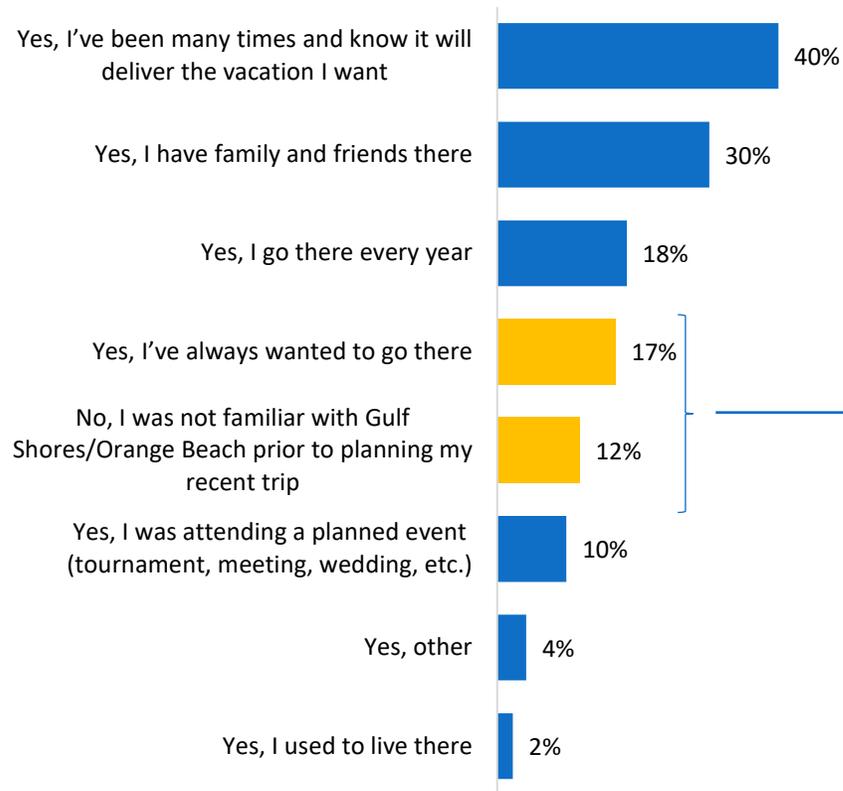
Why did you visit the Welcome Center?



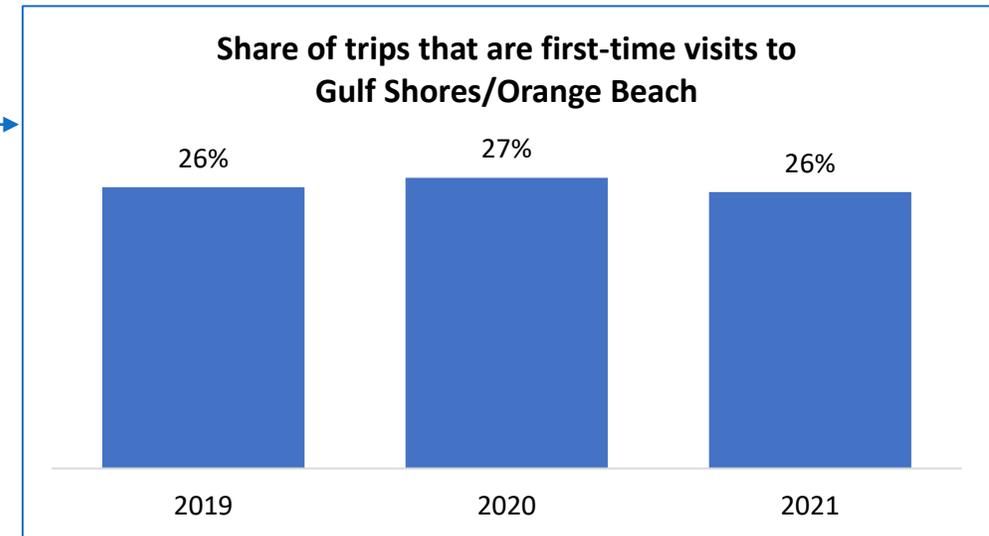
Question text: Why did you visit the welcome center? [Open ended response]

Trip Characteristics

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



- A quarter of Fall 2021 visitors were first-timers, which is in line with prior Fall measures.
- Most Fall visitors have been many times and/or have family and friends in the area; 18% are annual visitors.

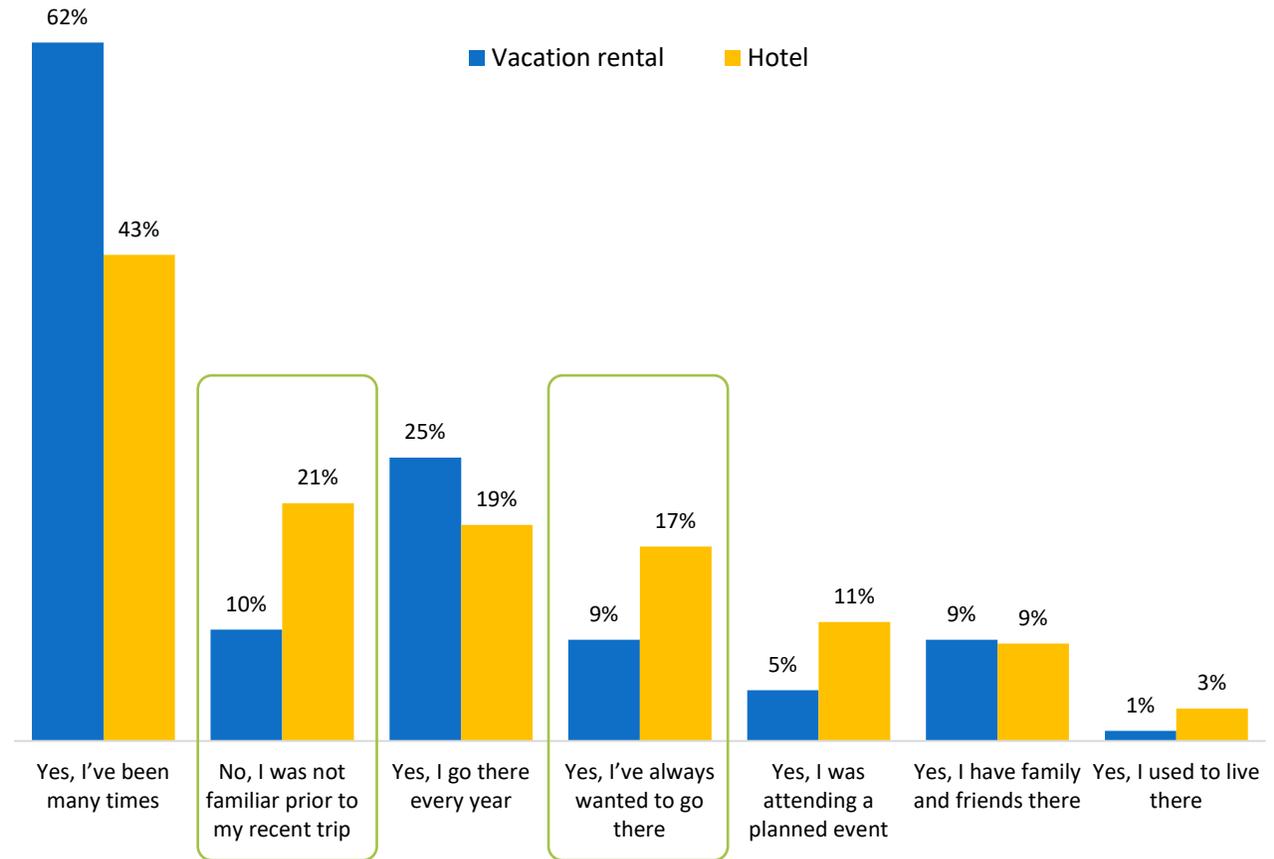


Question text: Prior to your visit, was Gulf Shores/Orange Beach familiar to you? Response options as shown in graph above.

Fall 2021 data shows us a similar pattern to prior measures: condo stayers are more likely to be repeat/annual visitors.

Hotel stayers are more likely to be aspirational visitors, unfamiliar with the destination prior to visiting.

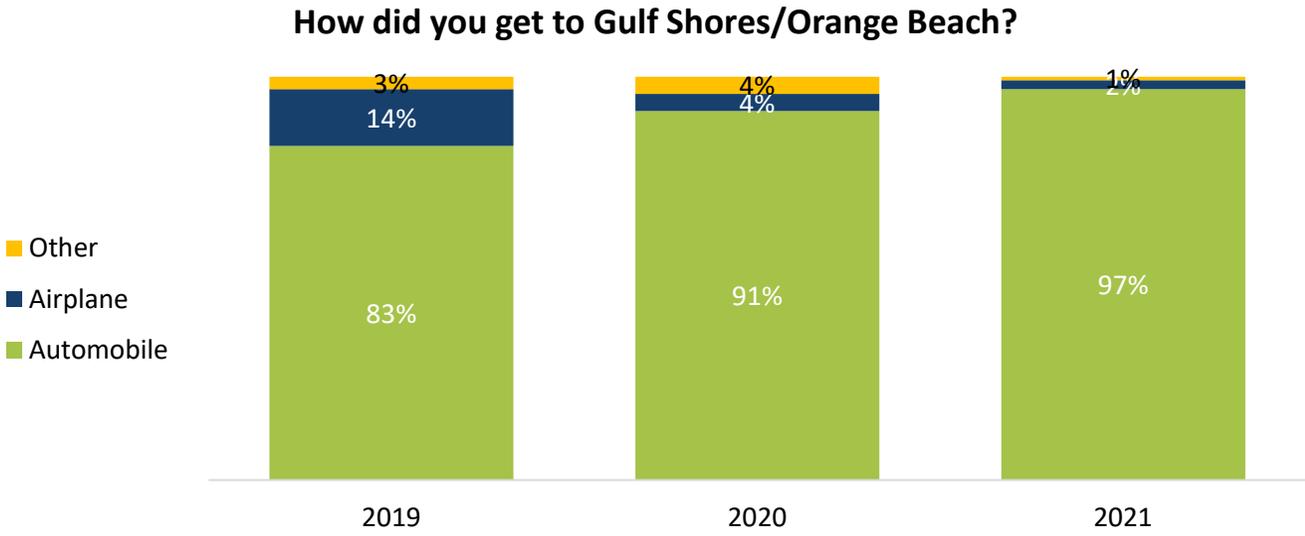
Differences in Reasons for Familiarity



Vacation rental/condo n=152 (a); Hotel/motel n=256 (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.

Trip Characteristics

- All but 3% of Fall 2021 visitors drove to GS/OB. Automobile travel is consistently the main way of accessing the destination.



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.

Trip Characteristics

- GS/OB beaches remain the most common attraction for Fall trips, following by dining out and relaxing.
- Fall 2021 saw a lift in Tanger Outlet visits.
- Many of the outdoor activities to which people migrated during the peak of the pandemic when social distancing was encouraged – shelling, fishing, trail hiking, watching wildlife – had less participation this Fall as leisure activities moved toward pre-pandemic patterns.

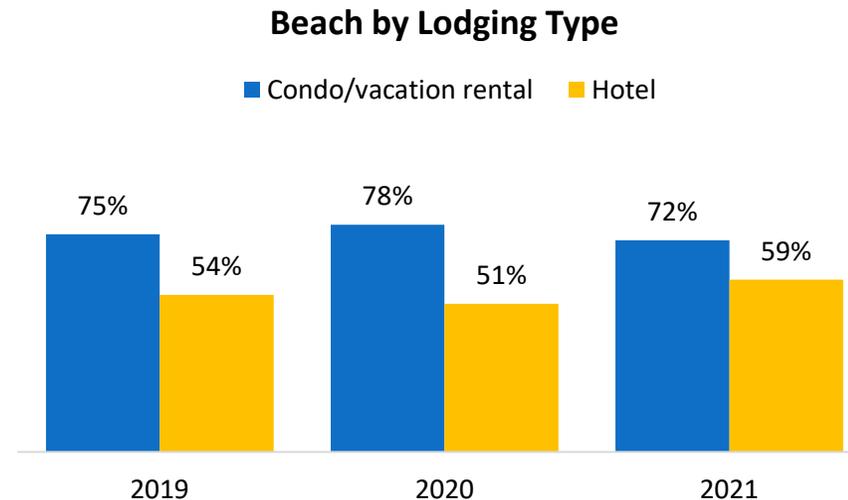
Fall trip participation	2019	2020	2021
Beaches	69%	73%	71%
Dining out	67%	60%	62%
Relaxing	66%	62%	54%
Shopping	47%	42%	48%
Swimming	37%	43%	41%
Tanger Outlets	29%	26%	34%
Sightseeing	29%	28%	25%
Gulf State Park	20%	12%	18%
The Wharf	18%	15%	17%
Photography	11%	15%	15%
Exercise/Working out	11%	18%	14%
Dolphin tour	11%	6%	12%
Shelling	16%	24%	12%
Dauphin Island	11%	15%	12%
Fort Morgan Historic Site	13%	10%	12%
Boating or sailing	6%	8%	11%
Fishing	8%	17%	10%
The Track	5%	7%	10%
Hiking on trails	8%	14%	9%
Family/friends reunion	7%	5%	9%
Battleship USS Alabama	10%	3%	9%
Alabama's Coastal Connection Scenic Byway	8%	7%	9%
Golfing	9%	7%	9%
Watching wildlife	15%	19%	9%
Historical sites	13%	10%	9%
OWA Park	3%	4%	8%

Cont'd.	2019	2020	2021
Visiting friends/relatives in the area	13%	10%	8%
Concerts and nightlife	11%	5%	8%
Parasailing/Jet skiing	4%	4%	8%
Bicycle riding	5%	9%	7%
Birdwatching	5%	9%	6%
Visiting a spa	6%	4%	6%
Adventure Island	9%	4%	6%
Alabama Gulf Coast Zoo	8%	6%	6%
National Naval Aviation Museum	8%	3%	6%
Sporting events	6%	2%	5%
Bellingrath Gardens	4%	3%	5%
Kayaking/Canoeing/Paddle boarding	7%	4%	4%
Bon Secour National Wildlife Refuge	6%	3%	4%
Festivals or special events	10%	2%	4%
Hugh S. Branyon Backcountry Trail	2%	3%	4%
Coastal Birding Trail			4%
Tennis	2%	4%	4%
Waterville	5%	2%	3%
Civil War History Trail			2%
Scuba diving/Snorkeling	4%	6%	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.

Trip Characteristics

- Looking at beach visits by type of accommodations, condo stayers continue to use the beaches at a higher rate than hotel stayers. However, there was growth this season in beach usage among hotel visitors. This could be weather related.

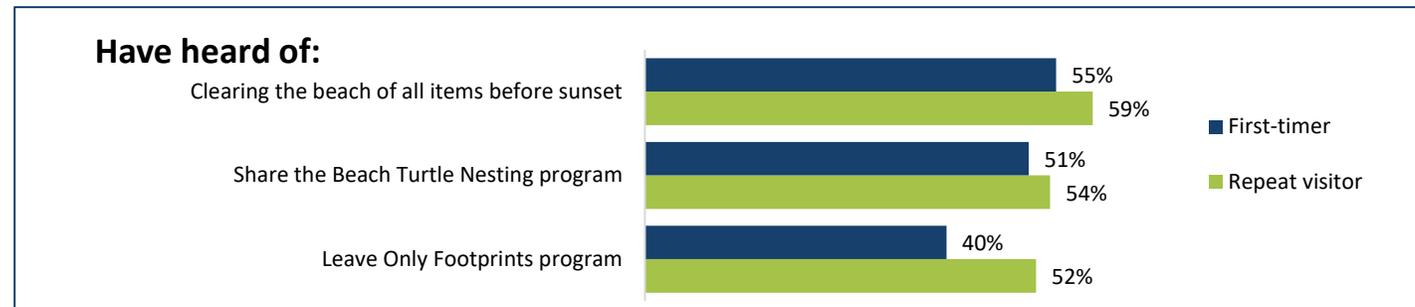


Question text: What attractions and activities did you visit or participate in while in Gulf Shores/Orange Beach on your trip? Response chosen: beach Condo/vacation rental 2021 n=141 (a); Hotel/motel n=209 (b)

Trip Characteristics

- Beaches remain the leading motivator for Fall 2021 visitors to choose GS/OB as their trip destination.
- Half of all visitors are aware of GSOBT's Share the Beach Turtle Nesting program and clearing the beach of all items before sunset, regardless if they were first-time or repeat visitors.
- First-time visitors were less likely to have heard of Leave Only Footprints.

Fall trip motivators	2019	2020	2021
Beaches	61%	64%	58%
Relaxing	42%	38%	29%
Dining out	31%	26%	24%
Swimming	13%	16%	14%
Tanger Outlets	10%	9%	11%
Shopping	16%	14%	10%
Fishing	4%	7%	6%
Sightseeing	8%	8%	5%
Gulf State Park	7%	3%	5%
Visiting friends/relatives in the area	8%	6%	4%



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

- Trip spending was similar to prior Fall measures, with lodging representing about half of Fall expenditures. The breakdown by lodging type shows an increase in lodging spending by both hotel and condo stayers. Recreation expenditures have reached the pre-pandemic level.

ALL TARGET VISITORS

Average Travel Party Expenditures per Trip – FALL	2019		2020		2021	
	Spending	% of total	Spending	% of total	Spending	% of total
Lodging	\$812	50%	\$928	53%	\$945	52%
Meals/food/ groceries	\$333	20%	\$347	20%	\$401	22%
Shopping	\$260	16%	\$242	14%	\$211	12%
Recreation or entertainment	\$143	9%	\$101	6%	\$154	9%
Transportation within Gulf Shores	\$53	3%	\$75	4%	\$49	3%
Other	\$37	2%	\$42	2%	\$52	3%
TOTAL	\$1,638		\$1,734		\$1,811	

2019 n=437; 2020 n=336; 2021 n=408

TARGET VISITORS BY LODGING TYPE

Average Travel Party Expenditures per Trip – SUMMER	2019		2020		2021	
	Vacation rental	Hotel	Vacation rental	Hotel	Vacation rental	Hotel
Lodging	\$924	\$493	\$1,058	\$374	\$1,012 ^b	\$463
Meals/food/groceries	\$350	\$282	\$364	\$274	\$416	\$291
Shopping	\$262	\$252	\$240	\$252	\$204	\$256
Recreation or entertainment	\$131	\$177	\$86	\$164	\$157	\$133
Transportation within Gulf Shores	\$40	\$91	\$66	\$110	\$48	\$57
Other	\$33	\$51	\$32	\$81	\$53	\$44
TOTAL	\$1,740	\$1,345	\$1,847	\$1,256	\$1,891	\$1,243

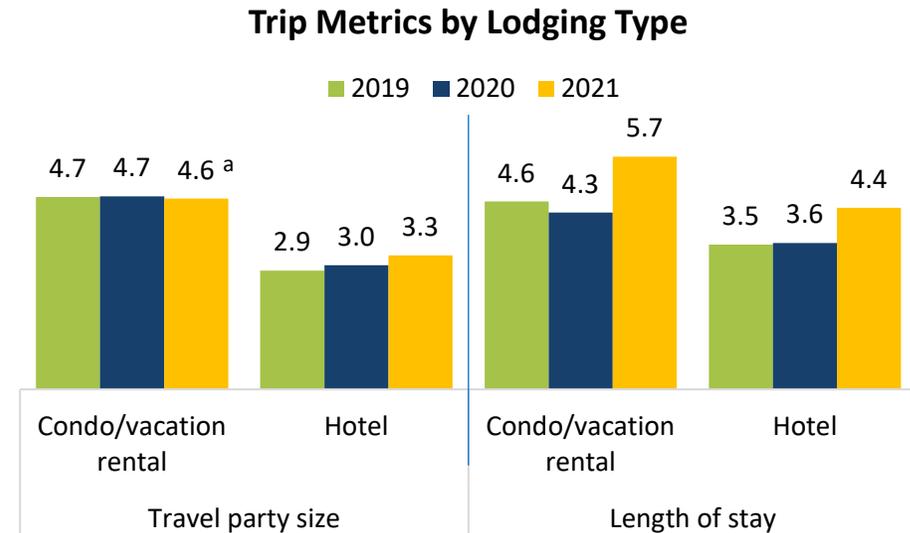
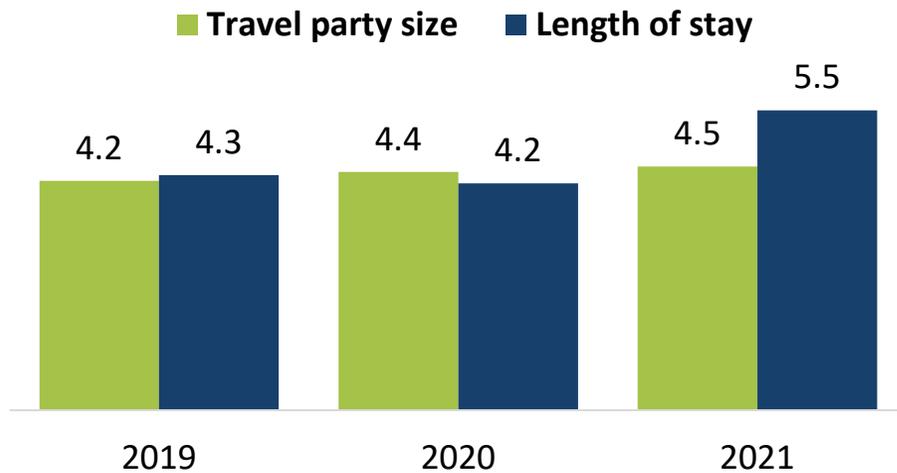
Condo/vacation rental 2019 n=206; 2020 n=122; 2021 n=152

Hotel/motel 2019 n=231; 2020 n=214; 2021 n=256

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

Travel Party Characteristics

- Fall visitors arrived with similar travel party sizes as last year.
- Fall 2021 stays were longer than in prior years, however, which helps explain higher lodging and entertainment spending. We see longer stays in both lodging types.



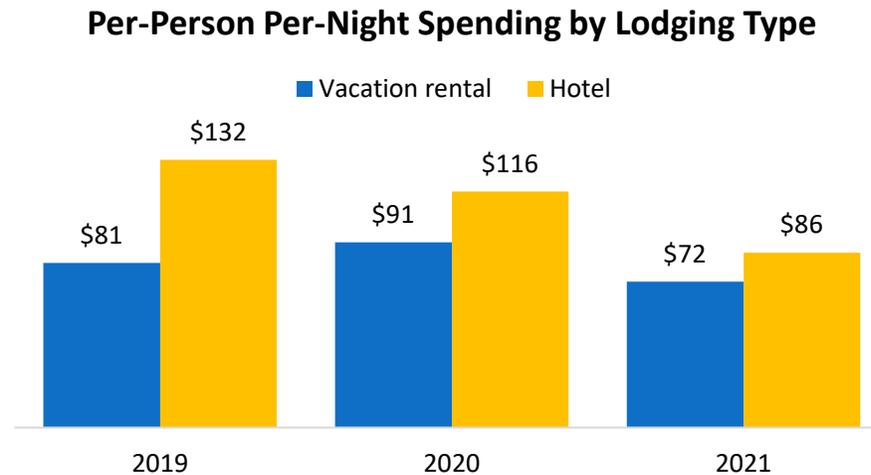
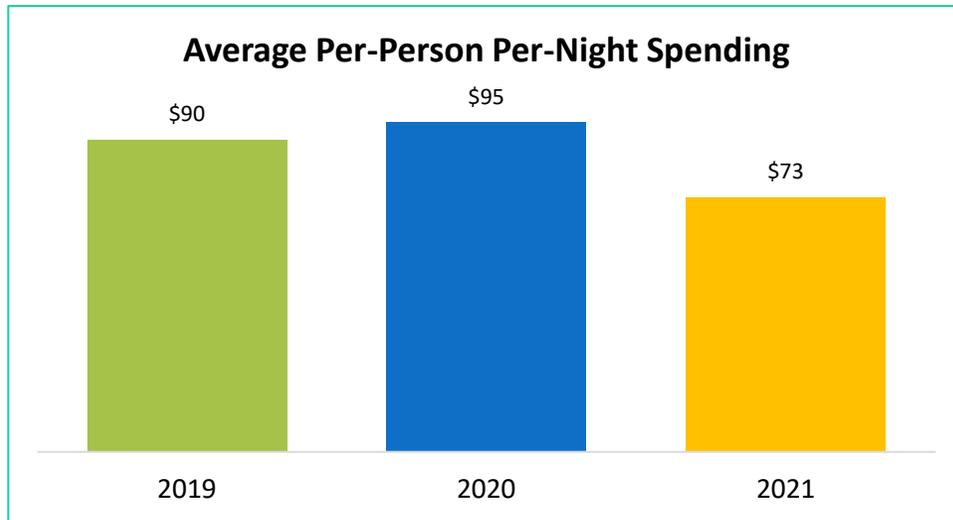
Question text: Including yourself, how many people were in your travel party? How many nights did you stay in Gulf Shores/Orange Beach during this trip? If you did not stay overnight, please enter '0'. Open-ended numeric responses.

Condo/vacation rental 2019 n=206; 2020 n=122; 2021 n=152
 Hotel/motel 2019 n=231; 2020 n=214; 2021 n=256

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

Trip Characteristics

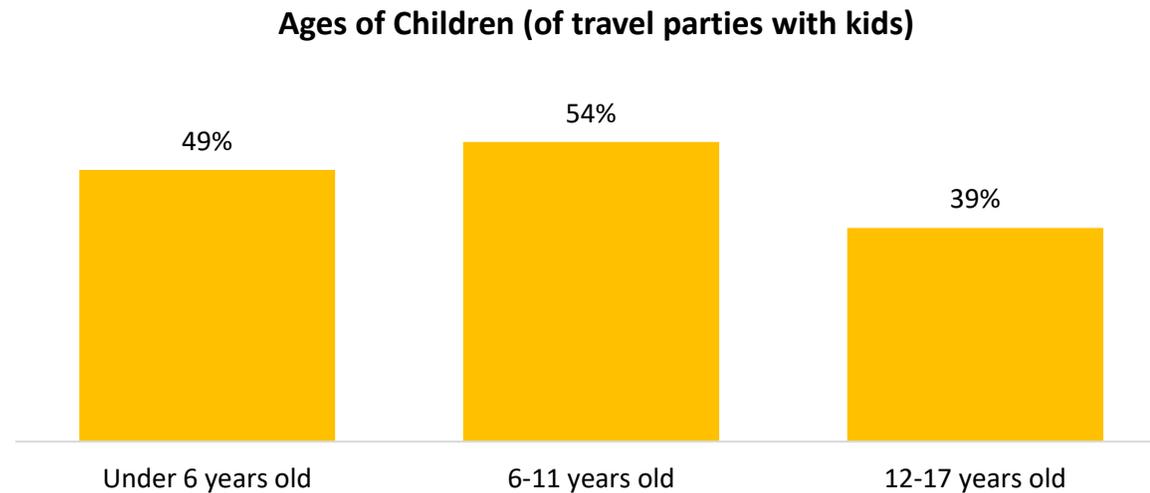
- Factoring in the longer stays, comparable travel party size, and marginally higher total trip spending for Fall visits, the average per-night per-person spending is lower than in recent years. This is true across both lodging types.



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.
Condo/vacation rental 2019 n=206; 2020 n=122; 2021 n=152
Hotel/motel 2019 n=231; 2020 n=214; 2021 n=256

Travel Party Characteristics

- Nearly half (47%) of Fall travel parties include children, up slightly from 2020's 40%.



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

Travel Party Characteristics

- Fall 2021 visitors are a little younger, continuing a trend we have seen for a couple of years.
- Consistent with younger travelers, fewer are married and incomes are lower.
- Most (72%) Fall visitors have been vaccinated against COVID-19.

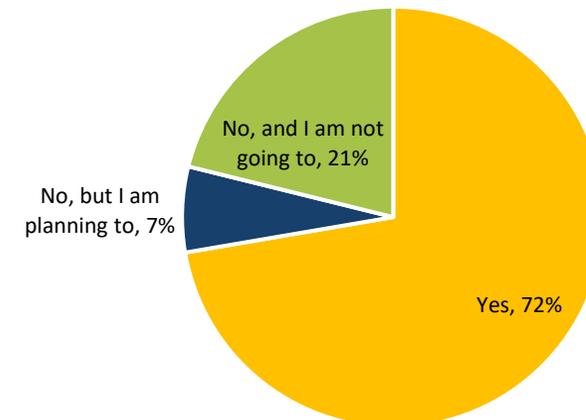
Year-over-Year Demographic Profile Summer visitors		2019	2020	2021
Age	Average	49	47	45
Marital status	Married	72%	74%	69%
	Divorced/Separated	9%	9%	10%
	Widowed	5%	2%	3%
	Single/Never married	15%	14%	18%
HH income	Average	\$129,417	\$127,224	\$119,879

2019 n=437; 2020 n=336; 2021 n=408

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)

Have you received the COVID-19 vaccine?



Travel Party Characteristics

- The age decrease among visitors is reflected in both lodging types.
- While incomes have decreased, the share of college educated Fall visitors remains in line with prior measures.
- There is an increase in educators among Fall visitors this year, and healthcare was added as an occupation.
- The share of retirees among condo staters is lower than we saw in 2020.

Summer demographic profile by lodging type		2019		2020		2021	
		Vacation rental/condo	Hotel	Vacation rental/condo	Hotel	Vacation rental/condo	Hotel
Age	Average	49	47	48	46	47	45
Marital status	Married	76%	68%	75%	74%	73%	65%
	Divorced/Separated	10%	7%	8%	10%	6%	14%
	Widowed	5%	5%	2%	2%	4%	2%
	Single/Never married	10%	20%	15%	14%	17%	19%
HH income	Average	\$128,758	\$133,518	\$124,447	\$129,265	\$116,509	\$126,157
Education	College grad+	64%	66%	67%	69%	68%	67%
Occupation	Executive/upper management	16%	25%	16%	19%	5%	24%
	IT professional	3%	12%	11%	20%	11%	8%
	Educator	11%	4%	4%	3%	14%	8%
	Healthcare					6%	10%
	Homemaker	13%	7%	6%	5%	14%	5%
	Student	0%	2%	1%	0%	1%	0%
	Small business owner	7%	5%	3%	6%	9%	3%
	Skilled trade/service	8%	13%	8%	10%	6%	8%
	Other	20%	16%	11%	18%	11%	10%
	Retired	20%	16%	33%	17%	19%	20%
Not currently employed	1%	2%	7%	2%	4%	4%	
Ethnicity	Caucasian/White	88%	75%	87%	88%	86%	85%
	African-American/Black	5%	13%	6%	4%	7%	13%
	Latino/Hispanic	4%	9%	6%	5%	3%	3%
	Asian	3%	8%	2%	2%	4%	2%
	American Indian	2%	3%	1%	4%	2%	1%
	Other	1%	1%	1%	1%	2%	0%

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

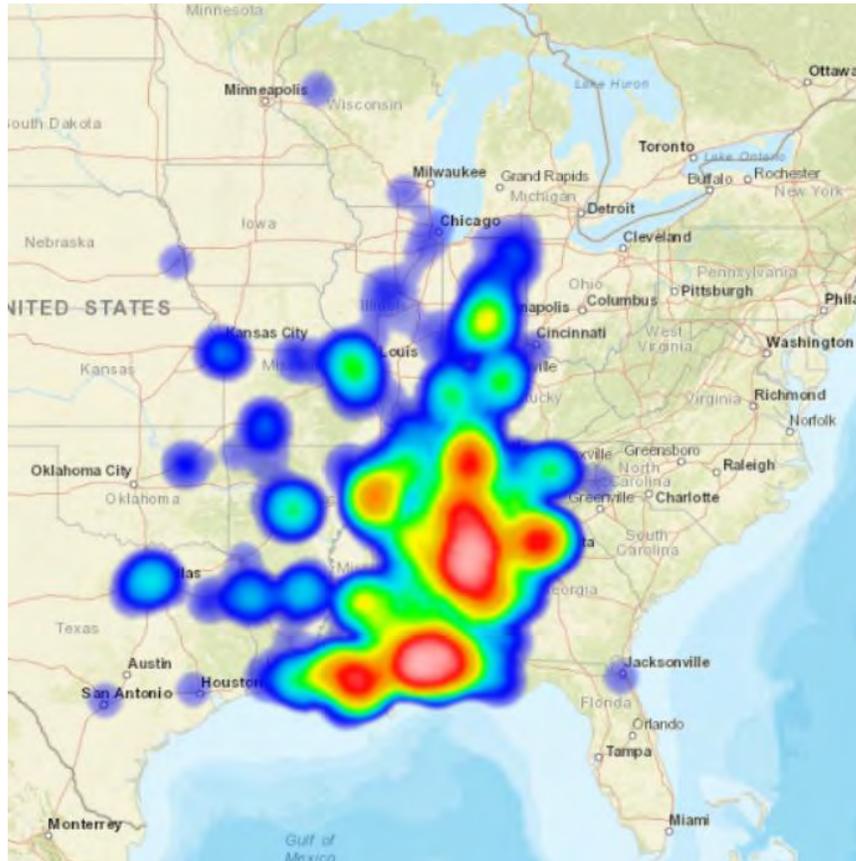
Travel Party Characteristics – New Visitors

- Looking at Fall visitors by whether or not they've visited GS/OB before sheds light on the demographic shifts: repeat visitors are more similar to repeat visitors in prior Fall seasons. New visitors are younger, less affluent, and more likely to be single, but just as likely to be college grads than new visitors in prior years.
- There is more ethnic diversity among new visitors than among repeat visitors.

Summer demographic profile of new visitors		Repeat visitors			New visitors		
		2019	2020	2021	2019	2020	2021
Age	Average	50	48	47	46	46	42
Marital status	Married	73%	68%	71%	63%	77%	62%
	Divorced/Separated	9%	11%	11%	9%	9%	7%
	Single/Never married	13%	18%	3%	24%	13%	29%
	Widowed	4%	3%	14%	5%	1%	2%
HH income	Average	\$128,981	\$120,278	\$123,063	\$121,495	\$124,804	\$110,673
Education	College grad+	66%	65%	69%	61%	76%	64%
Occupation	Executive/upper management	18%	16%	12%	23%	17%	22%
	IT professional	8%	10%	8%	6%	20%	15%
	Educator	6%	4%	11%	8%	3%	9%
	Healthcare			8%			9%
	Homemaker	8%	6%	13%	10%	5%	2%
	Student	1%	0%	0%	2%	1%	2%
	Small business owner	7%	5%	6%	4%	5%	4%
	Skilled trade/service	9%	9%	7%	17%	8%	9%
	Other	20%	17%	23%	10%	18%	11%
	Retired	22%	25%	8%	21%	17%	15%
	Not currently employed	2%	7%	9%	0%	4%	4%
Ethnicity	Caucasian/White	86%	88%	88%	68%	84%	78%
	African-American/Black	6%	6%	8%	15%	4%	16%
	Latino/Hispanic	5%	3%	3%	13%	11%	4%
	Asian	4%	3%	3%	9%	3%	2%
	American Indian	3%	3%	2%	0%	2%	0%

Travel Party Characteristics

- Heat map showing source markets of Fall visitors.



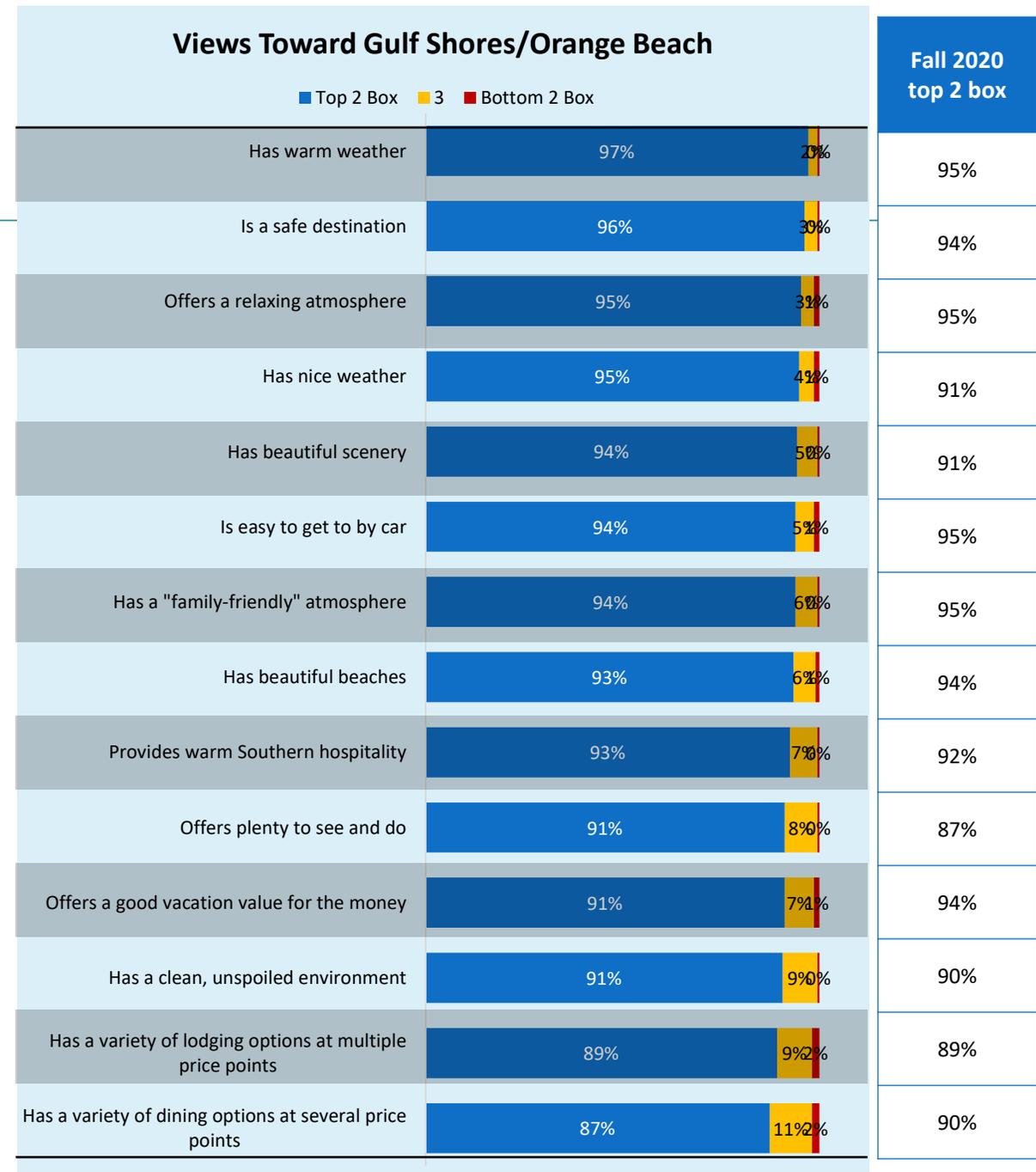
	Fall 2020	Fall 2021
Alabama	45%	36%
Tennessee	7%	13%
Louisiana	15%	10%
Mississippi	11%	10%
Georgia	5%	8%
Indiana	2%	3%
Kentucky	2%	3%
Florida	5%	3%
Texas	2%	3%
Arkansas	2%	3%

Data shown here is from mobile location data and includes both target and day visitors; visitors are represented in this data one time regardless of how many times they visited.

Views Toward GS/OB & Trip Satisfaction

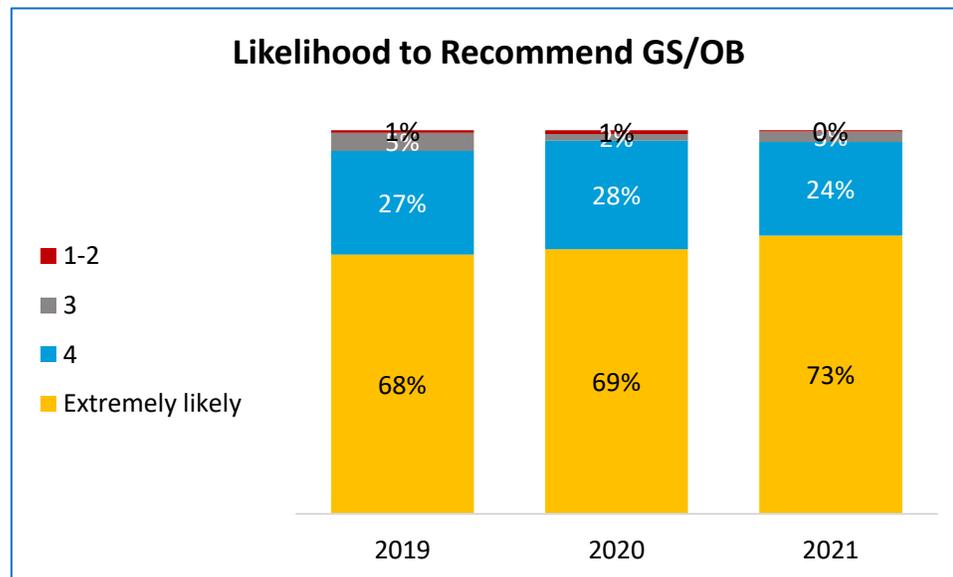
- Agreement is higher this Fall than last that GS/OB has warm weather and nice weather.
- While GSOBT has no control over the weather, it does help communicate what is open and available to see and do. Agreement with that measure – GS/OB offers plenty to see and do – is also up this year over last, as is beautiful scenery.

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 the destination is up this year, driven mainly by hotel stayers. This is a very positive result and illustrates the value of introducing new visitors to the destination.



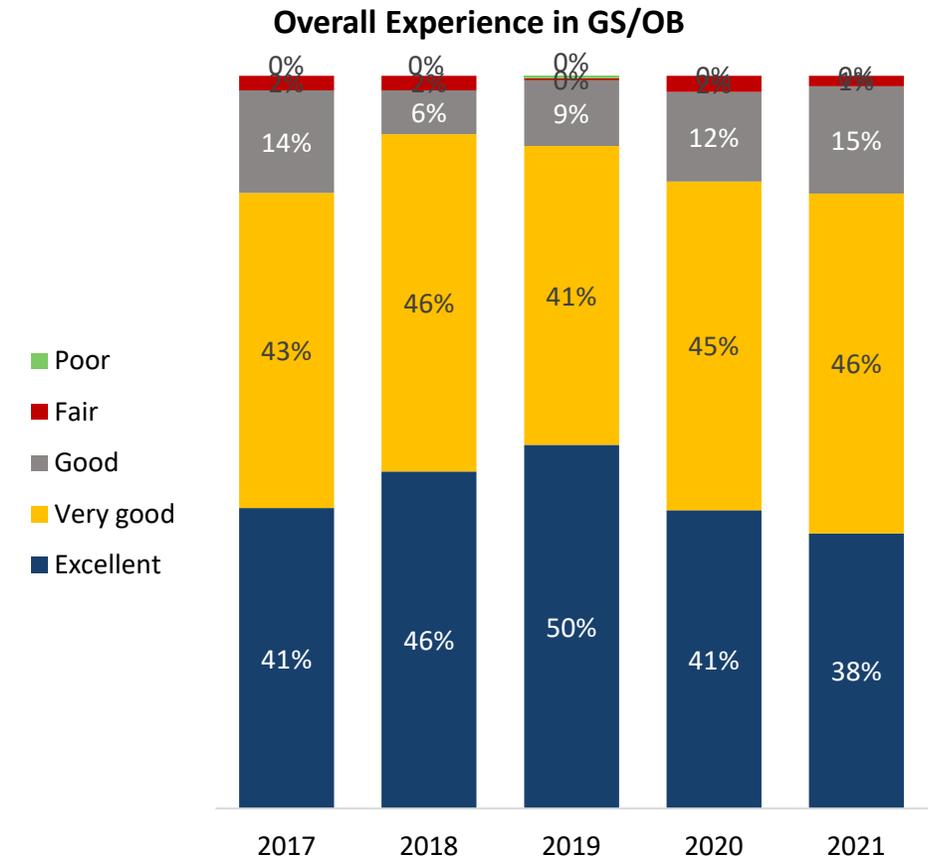
How likely are you to recommend Gulf Shores/Orange Beach to your friends or family as a destination to visit for a leisure trip? Summer visitors	2019 Top 2 Box %	2020 Top 2 Box %	2021 Top 2 Box %
Vacation rental/condo	96%	98%	95%
Hotel	94%	96%	99%

Condo/vacation rental 2019 n=206; 2020 n=122; 2021 n=152
 Hotel/motel 2019 n=231; 2020 n=214; 2021 n=256

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

- While likelihood to recommend is up, ratings of the overall trip experience continue a year-to-year decline. Visitors recognize the appeal of the leisure product as a whole and seem to understand that the elements that make for a less satisfying experience are temporary.
- While no Fall visitors rated their experience “poor” and only 1% gave it a score of “fair,” we do see a shift from “excellent” to “very good” and “good.”
- As we will see next, this is due both to the pandemic (and differing levels of comfort with recommended health and safety measures) and to staffing challenges creating long waits.

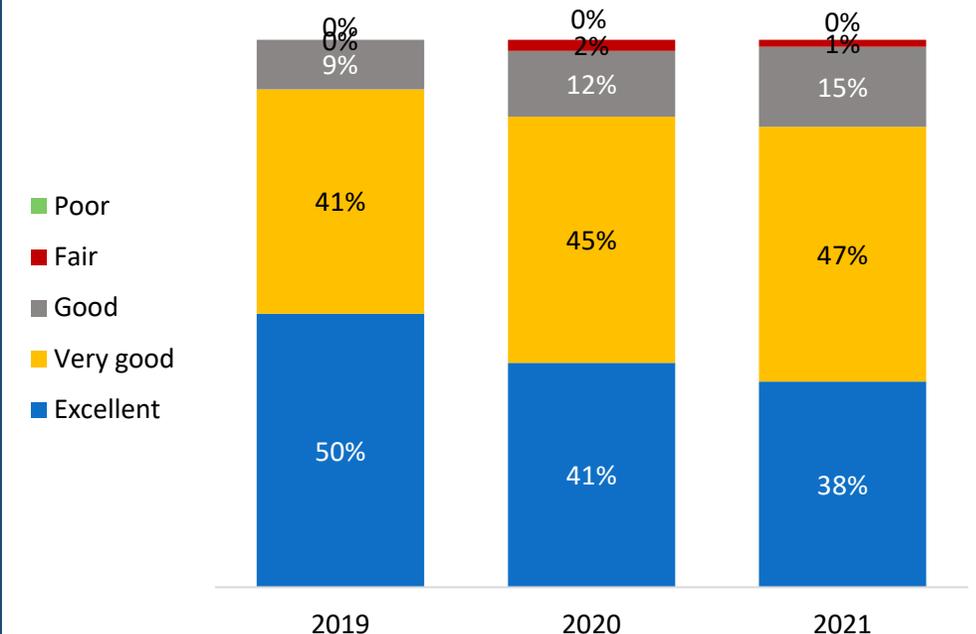


Question text: Thinking about your overall experience in Gulf Shores/Orange Beach during your trip, would you say it was...?

Views Toward GS/OB & Trip Satisfaction

- Ratings of customer service as “excellent” also continued to decline.
- Staffing shortages and the ongoing pressure of the pandemic were likely the cause:
 - “They have great shopping and restaurants but staffing was low so the service wasn’t as good as it had been in the past.”
 - “it was good, some places had less staff than others. a lot of places closed early”
 - “It would have been excellent but there were very little concerns about covid and we had unvaccinated little kids with us. Also, lots of things were not available due to shortages and prices as far as food.”
 - “The places were good but I would have preferred better COVID precautions in place”
 - “Things were good and people were nice, but some places i did not feel that safety was a priority”
 - “Some of the restaurants seemed to be short staffed and waiting times were very long.”
 - “Wait times are long and it seems very crowded during a global pandemic. I felt unsafe, I was worried about my children.”

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

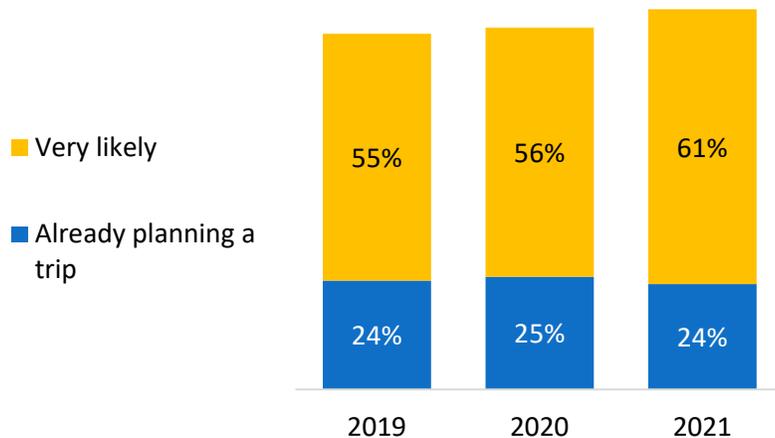


Question text: Overall, how would you rate the quality of the service you received at stores, restaurants, attractions, and lodging establishments in Gulf Shores/Orange Beach?
Response options: Poor, Fair, Good, Very good, Excellent

Views Toward GS/OB & Trip Satisfaction

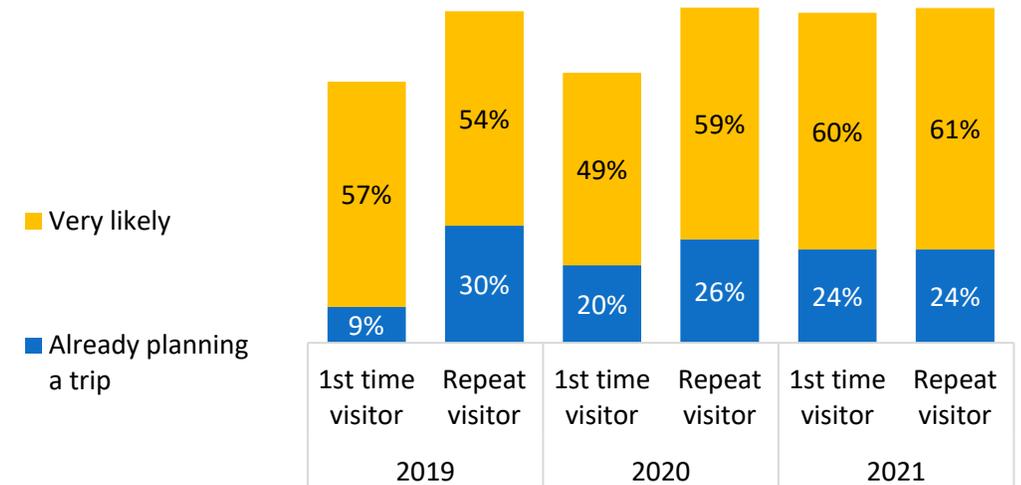
- Likelihood to return to GS/OB next year is a positive measure for Fall 2021 visitors. While about a quarter are already planning a trip – and this is consistent year-to-year – there is growth in those very likely to come back next year. Even more positive is that this is the same result among both first-time and repeat visitors.

Likely to Return to GS/OB in the Next Year



Of those already planning a return trip to GS/OB:	
I've been many times and know it will deliver the vacation I want	58%
I go there every year	46%
I have family and friends there	12%
I've always wanted to go there	11%
I was attending a planned event (tournament, meeting, wedding, etc.)	7%

Likelihood to Visit GS/OB in the Next Year

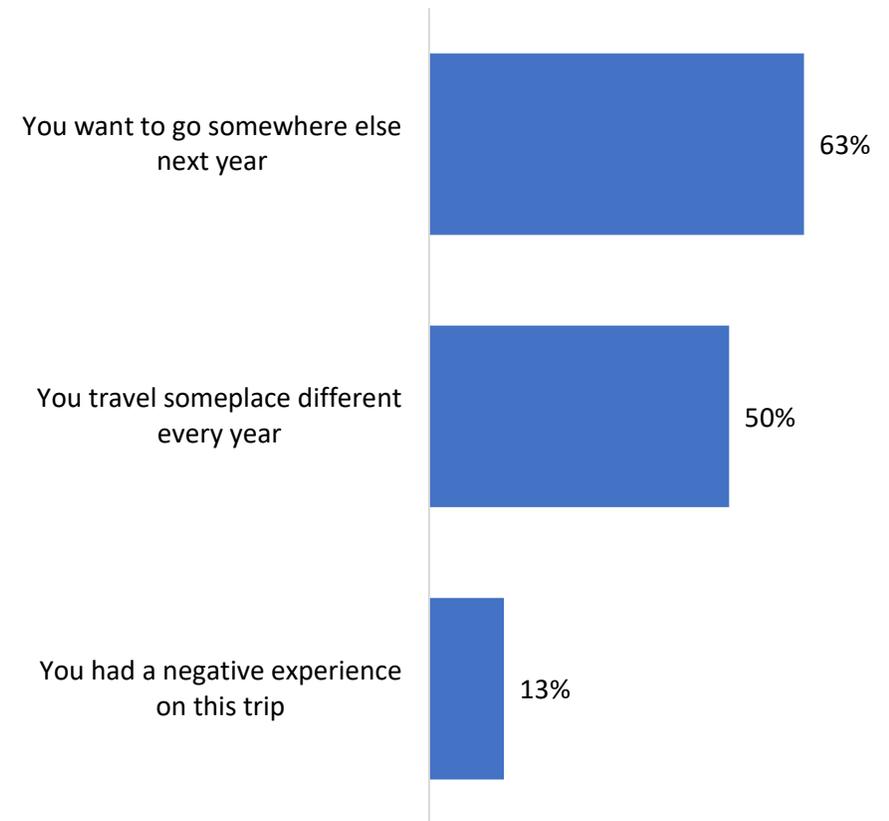


Question text: How likely are you to visit Gulf Shores/Orange Beach in the next year? Response options: Not at all likely, Not very likely, Somewhat likely, Very likely, Already planning a trip

Views Toward GS/OB & Trip Satisfaction

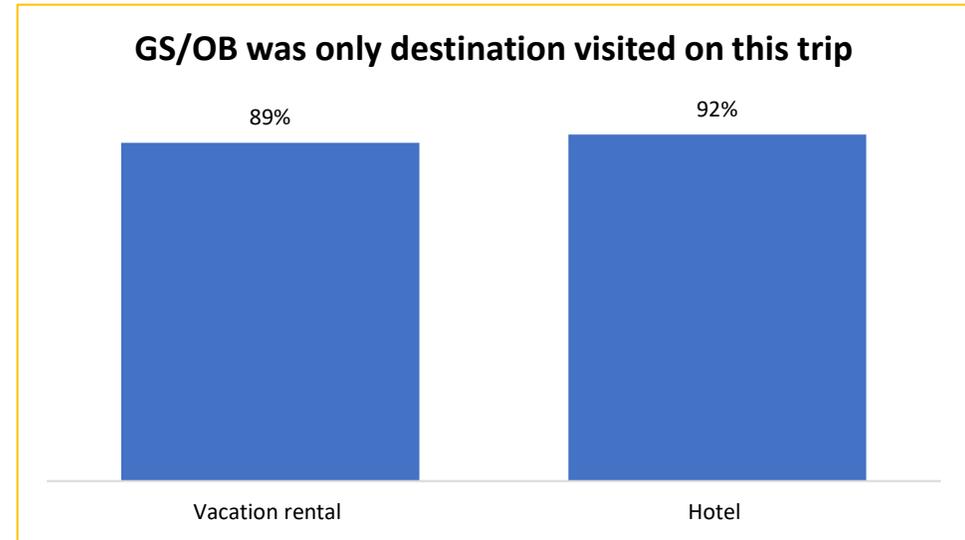
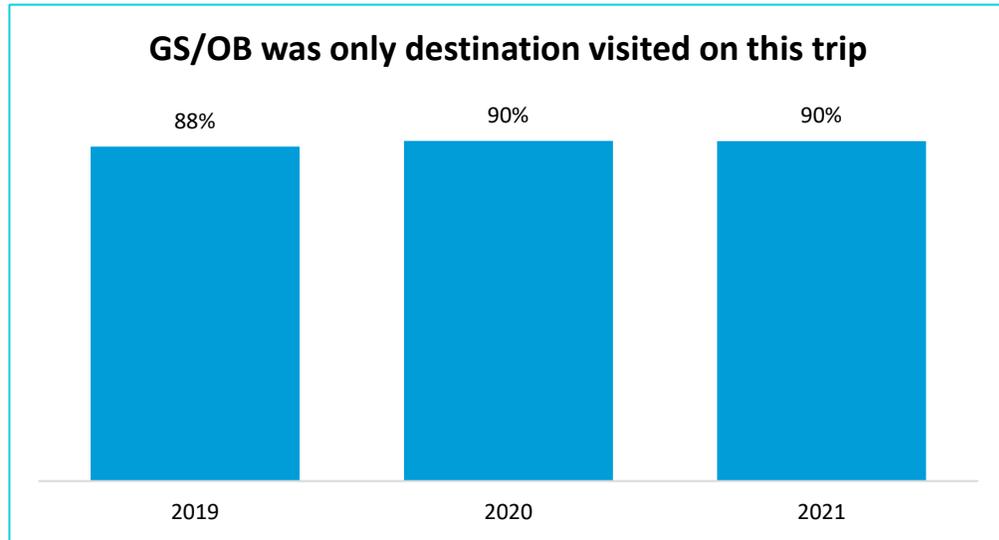
- Among Fall 2021 unlikely to return next year, nearly two-thirds want to go somewhere else. Half are in the habit of visiting a different location each year.
- Of the small share (13% of the 3% who were not very or not at all likely to return) who reported a negative experience on their Fall 2021 trip, comments included:
 - “Too many people and buildings”
 - “It is very difficult to travel with very young children. I will wait until they are a little older before going on vacation again.”
 - “I just felt like there were not enough compliance with COVID safety regulations. As an immunocompromised individual I felt uneasy for myself and my unvaccinated children.”

Would you say that the reason you are not likely to return next year is... ?



Destinations Visited

- Most Fall 2021 visitors were focused on GS/OB as their only destination for this trip.



Question text: Was Gulf Shores/Orange Beach the only destination you visited on this trip? Yes/No



Welcome Center Supplemental Analysis

Visitor Profile Research – Fall 2021

Welcome Center Impact

- A quarter of Fall 2021 visitors (up from 16% in Fall 2020) visited the welcome center.
- We don't typically see length of stay impacted by Welcome Center visitation, since trip length is typically determined before a trip begins.
- However, welcome center visitors do engage in more activities and attractions on their trips, which benefits the destination and its partners.

Fall 2021 visits	No Welcome Center	Visited Welcome Center
Length of stay	4.0	3.9
# of activities on trip	4.7	8.9

Impact on Spending

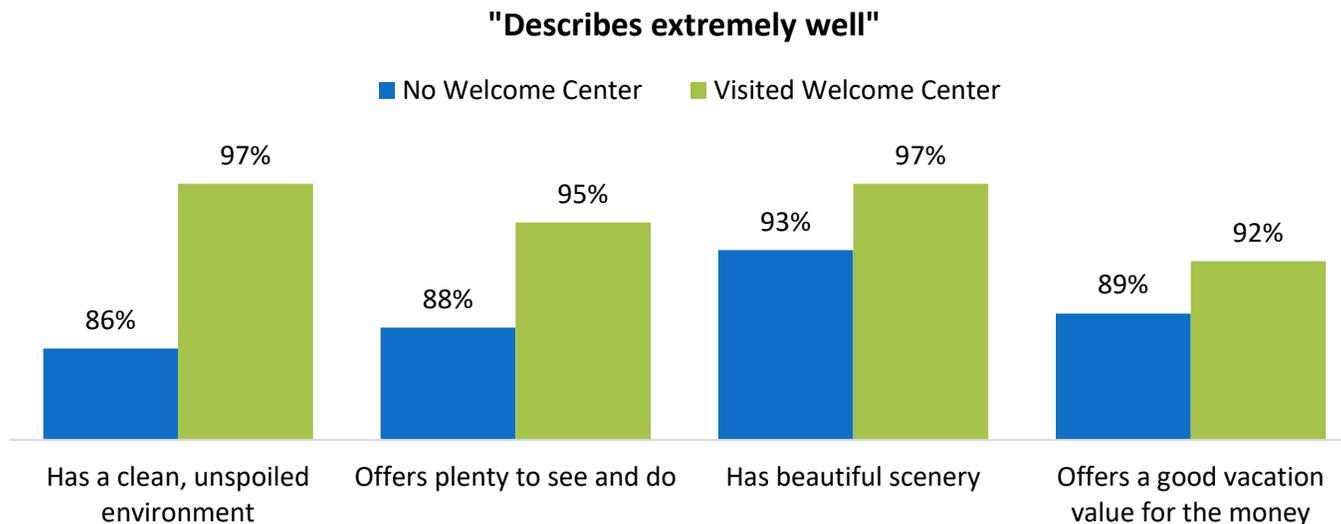
- Consistent with more activities, welcome center visitors outspend non-visitors in shopping, transportation, and other expenditures.
- Welcome center visitors tend to be hotel stayers, and lodging costs associated with hotel stays are lower, impacting overall visit spending.
- Likewise, larger travel party sizes and longer stays – hallmarks of condo stayers – have higher food spending, so we would not see as much impact on this spending category.

Trip spending	No Welcome Center	Visited Welcome Center
Lodging	\$1,029	\$449
Meals/food/groceries	\$424	\$264
Shopping	\$209	\$222
Recreation or entertainment	\$156	\$149
Transportation within Gulf Shores	\$44	\$85
Other	\$48	\$77
Total	\$1,910	\$1,246

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.

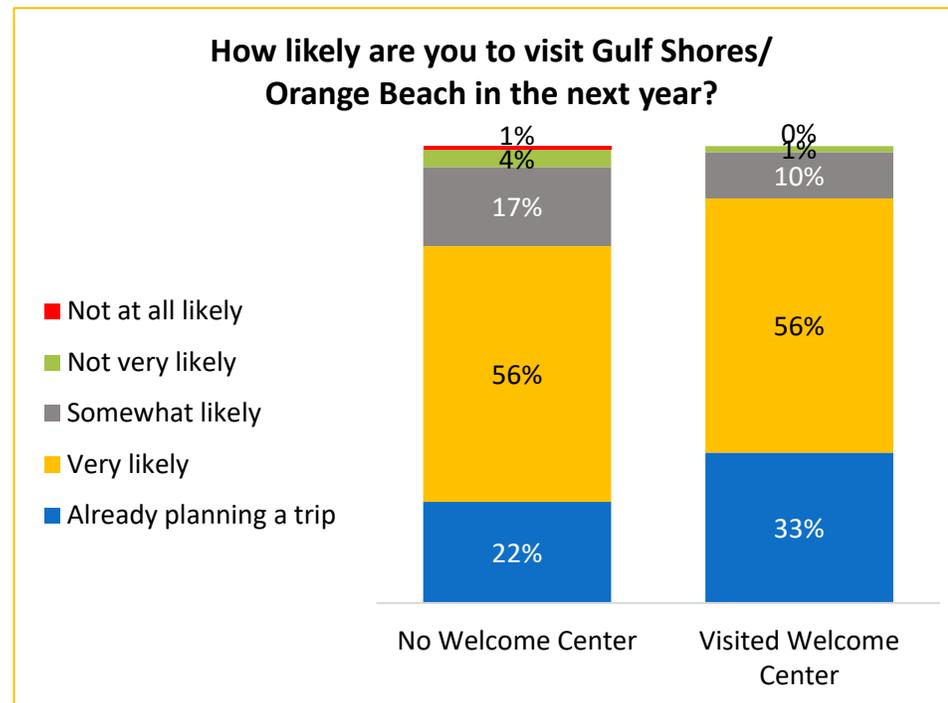
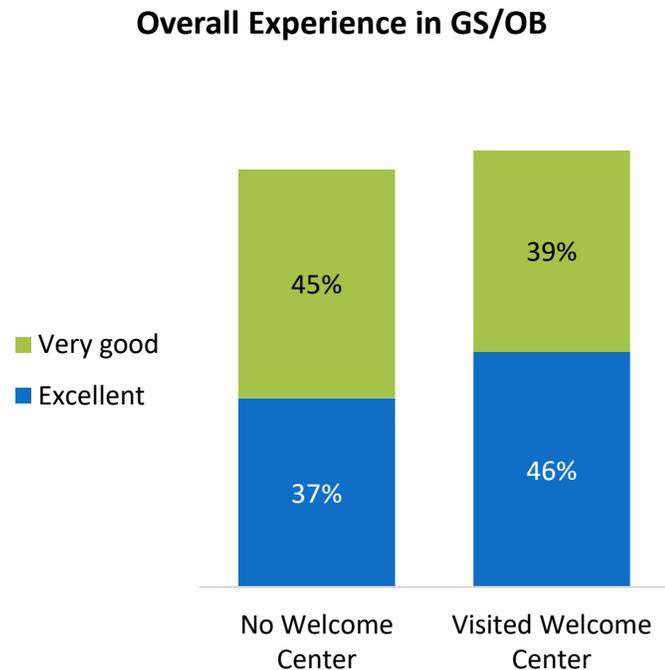
Impact on Image

- Welcome center visitors have more positive views of the destination's environment, scenery and experiences available. And this combination helps boost perceptions of GS/OB as being a good value.



Impact on Experience and Intent to Return

- Consistent with more exploration of and engagement with the destination, welcome center visitors rate their trip experience better and are more likely to return. This underscores the importance of continuing to provide the welcome center experience.





Appendix

Visitor Profile Research – Fall 2021

Comparing Target to Other Travelers

- Fall 2021 day trip visitors have visited twice in the past year, down from 3.6 visits per year pre-pandemic.
- GSOBT focuses analysis of non-target trips on day visits to the destination. 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 FALL Day trips	2019	2020	2021
Average # visits/year	3.6	3.0	2.1
First time trips	31%	17%	11%

2019 day trip n=100; 2020 day trip n=143; 2021 day trip n=104

Comparing Target to Other Travelers

Began planning summer trip	2019		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
< 1 week before trip	5%	46%	3%	56%	16%	58% ^b
1-2 weeks	11%	14%	10%	16%	15%	20%
3 weeks - 1 month	18%	14%	20%	13%	18%	17%
2 - 3 months	32%	20%	30%	8%	23% ^a	2%
4-6 months	18%	0%	23%	6%	17% ^a	2%
6+ months	16%	7%	12%	1%	11% ^a	1%

GS/OB is only destination visited on this trip	2019		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
	89%	90%	90%	78%	90%	87%

2019 target n=437, day trip n=100; 2020 target n=336, day trip n=143; 2021 target n=408, day trip n=104

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 table.
 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	2019		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Family or friends	29%	24%	34%	24%	30%	27%
Gulf Shores & Orange Beach Tourism website	19%	12%	17%	14%	19%	12%
Alabama's official tourism website	20%	8%	24%	9%	9%	9%
Social media	16%	10%	13%	1%	15%	7%
Hotel websites	15%	5%	18%	6%	17% ^a	5%
Booking websites or apps	10%	6%	10%	3%	14%	5%
Traveler review sites or apps	31%	8%	20%	2%	21% ^a	5%
Local vacation rental company sites	5%	4%	12%	6%	16% ^a	4%
Magazine and newspaper articles	6%	3%	3%	3%	3%	3%
Vacation home rental booking sites/apps	18%	4%	5%	3%	45% ^a	3%
Travel blogs	20%	9%	17%	8%	5%	1%
Travel/visitor guide	14%	8%	9%	6%	8% ^a	1%
Travel advice websites or apps	23%	7%	49%	3%	14% ^a	1%

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.

2019 target n=437, day trip n=100;
2020 target n=336, day trip n=143;
2021 target n=408, day trip n=104

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

Comparing Target to Other Travelers

Children on trip	2019		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
% of trips with children	44%	26%	42%	25%	47% ^a	20%
Of trips with children:	<i>2019 target n=170, day trip n=19; 2021 target n=109, day trip n=12</i>					
< 6 years old	50%	42%	53%	38%	57%	33%
6-11 years old	50%	47%	56%	45%	54%	42%
12-17 years old	47%	26%	40%	62%	37%	58%

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	2019		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Automobile	83%	88%	92%	94%	97%	97%
Bus	14%	9%	2%	3%	1%	3%
Airplane	1%	2%	4%	1%	2%	0%
Other	1%	2%	2%	1%	0%	0%

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.

2019 target n=437, day trip n=100;
 2020 target n=336, day trip n=143;
 2021 target n=408, day trip n=104
 a / b indicate statistically significant differences at the 95% level.

Comparing Target to Other Travelers

	2019		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Travel party size	4.2	2.2	4.4	2.5	4.5	2.7

Trip spending	2019		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Lodging	\$812	\$ -	\$928	\$ -	\$943	\$-
Meals/food/groceries	\$333	\$109	\$347	\$90	\$401 ^a	\$84
Shopping	\$260	\$124	\$242	\$116	\$211 ^a	\$103
Recreation or entertainment	\$143	\$74	\$101	\$35	\$155 ^a	\$29
Transportation in Gulf Shores	\$53	\$56	\$75	\$376	\$50	\$30
Other	\$37	\$6	\$42	\$27	\$52	\$38
TOTAL	\$1,638	\$369	\$1,734	\$644	\$1,812	\$284
Per person spending	\$388	\$166	\$397	\$254	\$405	\$107

2019 target n=437, day trip n=100;
 2020 target n=336, day trip n=143;
 2021 target n=408, day trip n=104

a / b 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.

Comparing Target to Other Travelers

Demographics		2019		2020		2021	
		Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Age	Average	48	59	47	50	44	51
Marital status	Married	72%	62%	74%	54%	78%	83%
	Divorced/Separated	8%	13%	9%	16%	7%	9%
	Widowed	5%	4%	2%	5%	2%	4%
	Single/Never married	16%	20%	14%	25%	13%	4%
HH income	Average	\$129,417	\$93,011	\$127,224	\$100,722	\$119,879	\$114,541

2019 target n=437, day trip n=100; 2020 target n=336, day trip n=143; 2021 target n=408, day trip n=104
a / b 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	2019		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Is easy to get to by car	94%	93%	94%	91%	94%	94%
Offers plenty to see and do	95%	93%	95%	91%	91%	75%
Has beautiful scenery	95%	91%	95%	90%	93%	89%
Has a "family-friendly" atmosphere	91%	91%	91%	84%	94%	92%
Is a safe destination	95%	91%	95%	90%	96%	89%
Provides warm Southern hospitality	93%	89%	93%	91%	93%	89%
Has warm weather	95%	87%	95%	86%	97%	92%
Has a variety of lodging options at multiple price points	95%	87%	95%	85%	89%	94%
Has beautiful beaches	93%	87%	93%	91%	93%	89%
Has nice weather	94%	87%	94%	91%	87%	92%
Has a variety of dining options at several price points	90%	87%	90%	75%	87%	86%
Offers a relaxing atmosphere	92%	84%	92%	86%	95%	83%
Has a clean, unspoiled environment	89%	78%	89%	73%	91%	72%
Offers a good vacation value for the money	93%	78%	93%	75%	91%	78%

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

2019 target n=437, day trip n=100;
2020 target n=336, day trip n=143;
2021 target n=408, day trip n=104

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

Comparing Target to Other Travelers

Overall experience	2019		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Top 2 Box Rating	91%	84%	85%	76%	84%	78%
5 (Excellent)	50%	58%	43%	34%	38%	46%
4 (Very good)	41%	26%	42%	43%	46%	32%
3 (Good)	9%	13%	14%	19%	15%	18%
2 (Fair)	0%	2% ^a	1%	3%	1%	4%
1 (Poor)	0%	1%	0%	2%	0%	0%

Likelihood to recommend	2019		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Top 2 Box Rating	95%	84%	97%	86%	97%	75%
5 (Extremely likely)	70%	60%	69%	57%	73% ^a	47%
4	24%	24%	28%	30%	25%	28%
3	5%	9%	2%	12%	3%	17% ^b
2	0%	2%	1%	0%	0%	8%
1 (Not at all likely)	0%	4%	0%	1%	0%	0%

2019 target n=437, day trip n=100; 2020 target n=336, day trip n=143; 2021 target n=408, day trip n=104

a / b 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	2019		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Likely to return (top 2 box)	82%	78%	81%	81%	85%	69%
5 (Already planning a trip)	28%	18%	25%	22%	24%	17%
4 (Very likely)	54%	60%	56%	59%	61%	53%
3 (Somewhat likely)	14%	18%	16%	14%	12%	22%
2 (Not very likely)	3%	2%	3%	4%	3%	6%
1 (Not at all likely)	1%	1%	0%	1%	0%	3%

During which season(s) would you be most likely to visit (of those likely to visit)	2019		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Spring	44%	70%	37%	48%	39%	50%
Summer	41%	33%	56%	68%	55%	61%
Fall	65%	56%	52%	52%	44%	45%
Winter	16%	21%	10%	26%	14%	16%

2019 target n=437, day trip n=100; 2020 target n=336, day trip n=143; 2021 target n=408, day trip n=104

a / b 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	2019		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Alabama	44%	42%	26%	30%	30%	26%
Georgia	5%	2%	16%	6%	24%	13%
Tennessee	8%	0%	14%	1%	14%	9%
Florida	7%	36%	17%	41%	7%	34%
Louisiana	7%	2%	11%	6%	11%	15%
Texas	3%	7%	3%	0%	0%	0%
Mississippi	7%	7%	6%	14%	6%	4%
Indiana	3%	0%	2%	0%	0%	0%
Missouri	2%	0%	2%	0%	0%	0%
Illinois	1%	2%	1%	0%	0%	0%
Michigan	1%	0%	1%	1%	0%	0%
Wisconsin	0%	0%	1%	0%	0%	0%
Arkansas	2%	2%	1%	1%	1%	0%

2019 target n=437, day trip n=100; 2020 target n=336, day trip n=143; 2021 target n=408, day trip n=104

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

Comparing Non-Target Trips Year-Over-Year

General activities (non-target trips)	2019		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Dining out	67%	39%	52%	34%	62%	46%
Shopping	47%	29%	41%	31%	48%	28%
Beaches	69%	30%	61%	31%	71%	20%
Relaxing	66%	25%	53%	21%	54%	18%
Sightseeing	29%	14%	26%	13%	25%	12%
Visiting friends/relatives who live in the area	13%	8%	12%	9%	8%	12%
Fishing	8%	4%	19%	3%	10%	11%
Photography	11%	6%	16%	10%	15%	8%
Historical sites	13%	6%	13%	4%	9%	7%
Swimming	37%	4%	38%	8%	41%	7%
Boating or sailing	6%	5%	12%	2%	11%	4%
Family/friends reunion	7%	4%	8%	6%	9%	4%
Hiking on trails	8%	4%	16%	6%	9%	4%
Shelling	16%	8%	20%	6%	12%	4%
Watching wildlife	15%	8%	18%	8%	9%	4%
Exercise/working out	11%	7%	17%	4%	14%	3%
Bicycle riding	5%	4%	10%	3%	7%	3%
Birdwatching	5%	4%	11%	4%	6%	3%
Dolphin tour	11%	4%	7%	4%	12%	1%
Festivals or special events (non-sports events)	10%	6%	5%	5%	4%	1%
Sporting events	6%	4%	4%	2%	5%	1%
Tennis	2%	4%	5%	2%	4%	1%
Visiting a spa	6%	2%	7%	2%	6%	1%
Scuba diving/snorkeling	4%	3%	7%	1%	4%	1%
Concerts and nightlife	11%	7%	6%	4%	8%	0%
Golfing	9%	2%	9%	3%	9%	0%
Kayaking/canoeing/paddle boarding	7%	1%	7%	1%	4%	0%
Parasailing/jet skiing	4%	2%	5%	2%	8%	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 table.

2019 target n=437, day trip n=100; 2020 target n=336, day trip n=143; 2021 target n=408, day trip n=104

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

Comparing Non-Target Trips Year-Over-Year

Specific attractions (non-target trips)	2019		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Adventure Island	9%	4%	4%	2%	1%	6%
Alabama Gulf Coast Zoo	8%	5%	6%	4%	3%	6%
Alabama's Coastal Connection Scenic Byway	8%	3%	7%	5%	4%	9%
Battleship USS Alabama	10%	6%	3%	3%	1%	9%
Bellingrath Gardens	4%	2%	3%	1%	4%	5%
Bon Secour National Wildlife Refuge	6%	4%	3%	2%	4%	4%
Dauphin Island	11%	7%	15%	4%	3%	2%
Civil War History Trail					1%	4%
Coastal Birding Trail					8%	12%
Fort Morgan Historic Site	13%	3%	10%	5%	5%	12%
Gulf State Park	20%	6%	12%	3%	4%	18%
Hugh S. Branyon Backcountry Trail	2%	4%	3%	3%	3%	4%
National Naval Aviation Museum	8%	7%	3%	3%	4%	6%
OWA Park	3%	5%	4%	3%	9%	8%
Tanger Outlets	29%	22%	26%	15%	22%	34%
The Track	5%	2%	7%	1%	0%	10%
The Wharf	18%	4%	15%	3%	9%	17%
Waterville	5%	1%	2%	2%	0%	3%

2019 target n=437, day trip n=100; 2020 target n=336, day trip n=143; 2021 target n=408, day trip n=104

a / b 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 table.