



**GULF SHORES &  
ORANGE BEACH  
TOURISM**

Alabama's White-Sand Beaches

# Visitor Profile Research

Fall 2018

Strategic Marketing & Research Insights LLC

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# Introduction

Visitor Profile Research – Fall 2018

# Background

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- 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 is now partnering with Strategic Marketing & Research Insights (SMARInsights) to gather information from visitors to better understand the visitor experience, existing image of the area, demography and geographic origins of visitors by season. The research objectives include understanding what visitors think of the area, what drives them to visit, what their experience is in the area, trip satisfaction and characteristics, and travel planning. The methodology is largely online and is outlined in detail in the following section.
- In addition, to overcome a data deficit from 2017, SMARInsights gathered data on trips taken in 2017. The analysis reported here incorporates those trips as well.

# 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 other visitors (day trippers and those who stay longer than 30 days in paid or unpaid accommodations)



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



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

# Methodology

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- This report presents information collected through online surveys of visitors to Gulf Shores, Orange Beach, or Fort Morgan during fall 2017 and fall 2018 (September through November). There is discussion whether November trips should be included with fall or winter, and after winter data collection we will conduct an analysis to see which season is the best fit. For now, however, these trips are included with fall.
- 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 trips taken in 2017 and 2018.
- Data is weighted to match the destination’s actual occupancy rates over the relevant time period.
- Included in the data are interviews with travelers who crossed the GS/OB geofence during fall 2018. Geofencing is a technology that tracks when consumers’ cell phones cross a digital “fence” around a geographic area. Geofencing is being used to help identify shifting geographic origins of visitors by season, as it allows us to identify fenced travelers’ origin markets.

Number of trips represented in the data	Fall 2017	Fall 2018
Target trips (stayed 1-30 nights in paid accommodations)	383	397
Non-target trips (visited but did not stay overnight, did not use paid accommodations, or stayed more than 30 nights)	190	193



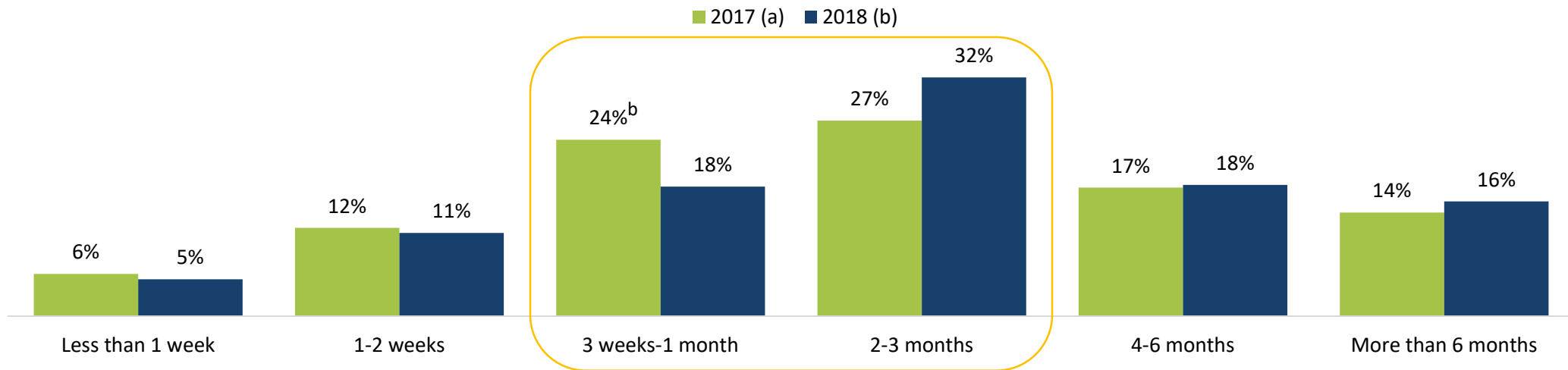
# Detailed Findings

Visitor Profile Research – Fall 2018

# Travel Planning

- Half of fall trips are planned 3 weeks to 3 months ahead of time. There is a difference in planning horizon by lodging type, as we will see next.

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



2017 n= 383 (a); 2018 n=397 (b); a / b indicate statistically significant differences at the 95% level.

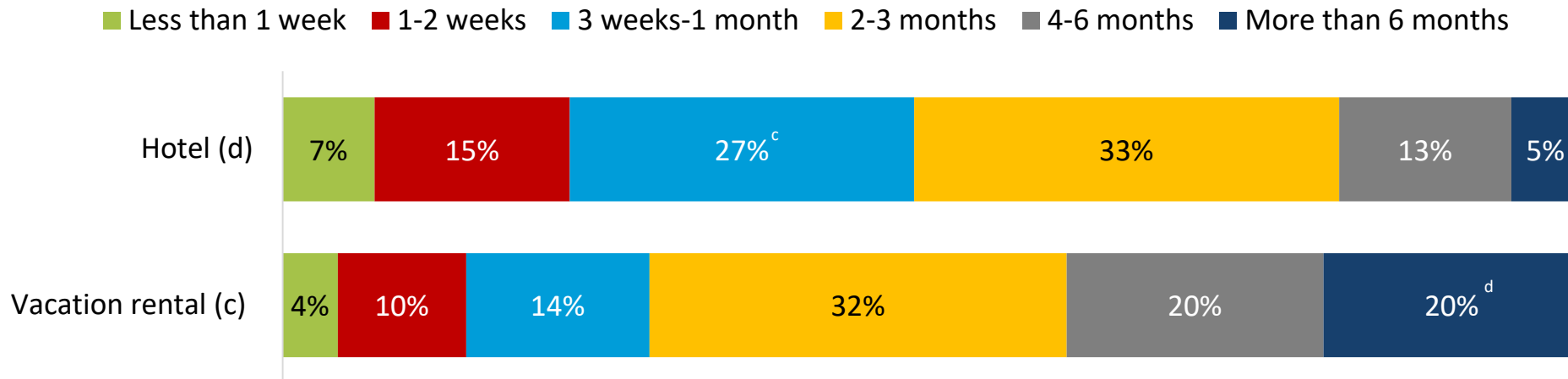
Question text: How far in advance did you begin planning your trip to Gulf Shores/Orange Beach? Response options as shown in graph above.



# Travel Planning – Hotel vs. Condo Rental

- As we have seen in other seasons, visitors who stay in hotels are more likely to plan and book in the short term.

**Fall Trip Planning Horizon by Lodging Type (2018 data)**



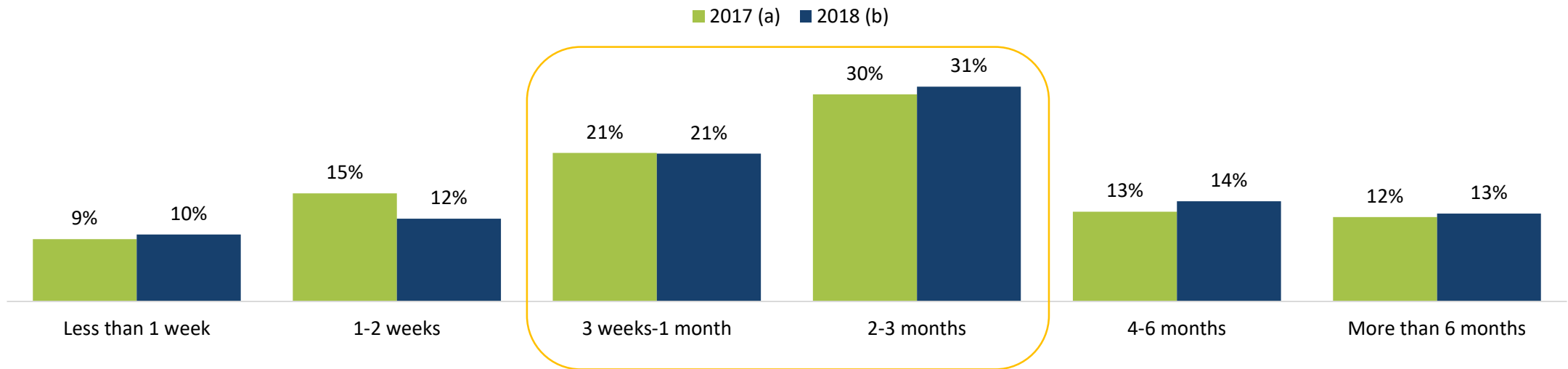
Vacation rental/condo n= 162 (c); Hotel/motel n=235 (d); c / d indicate statistically significant differences at the 95% level.

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

- As with trip planning overall, half of fall lodging bookings take place 3 weeks to 3 months ahead of travel.
- These parallel time frames suggest that planning and booking happen simultaneously for many travelers.

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

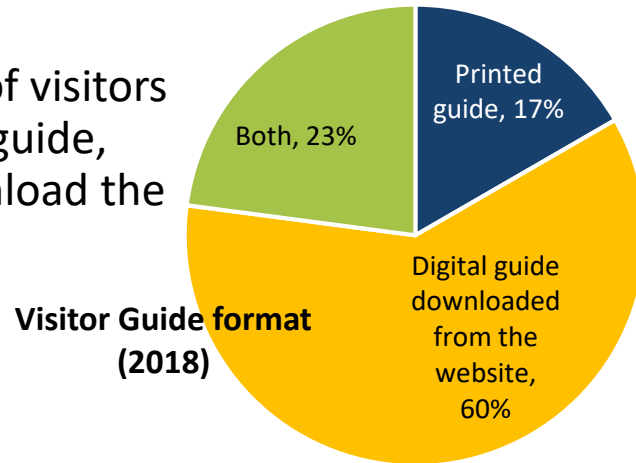


2017 n= 383 (a); 2018 n=397 (b); a / b indicate statistically significant differences at the 95% level.

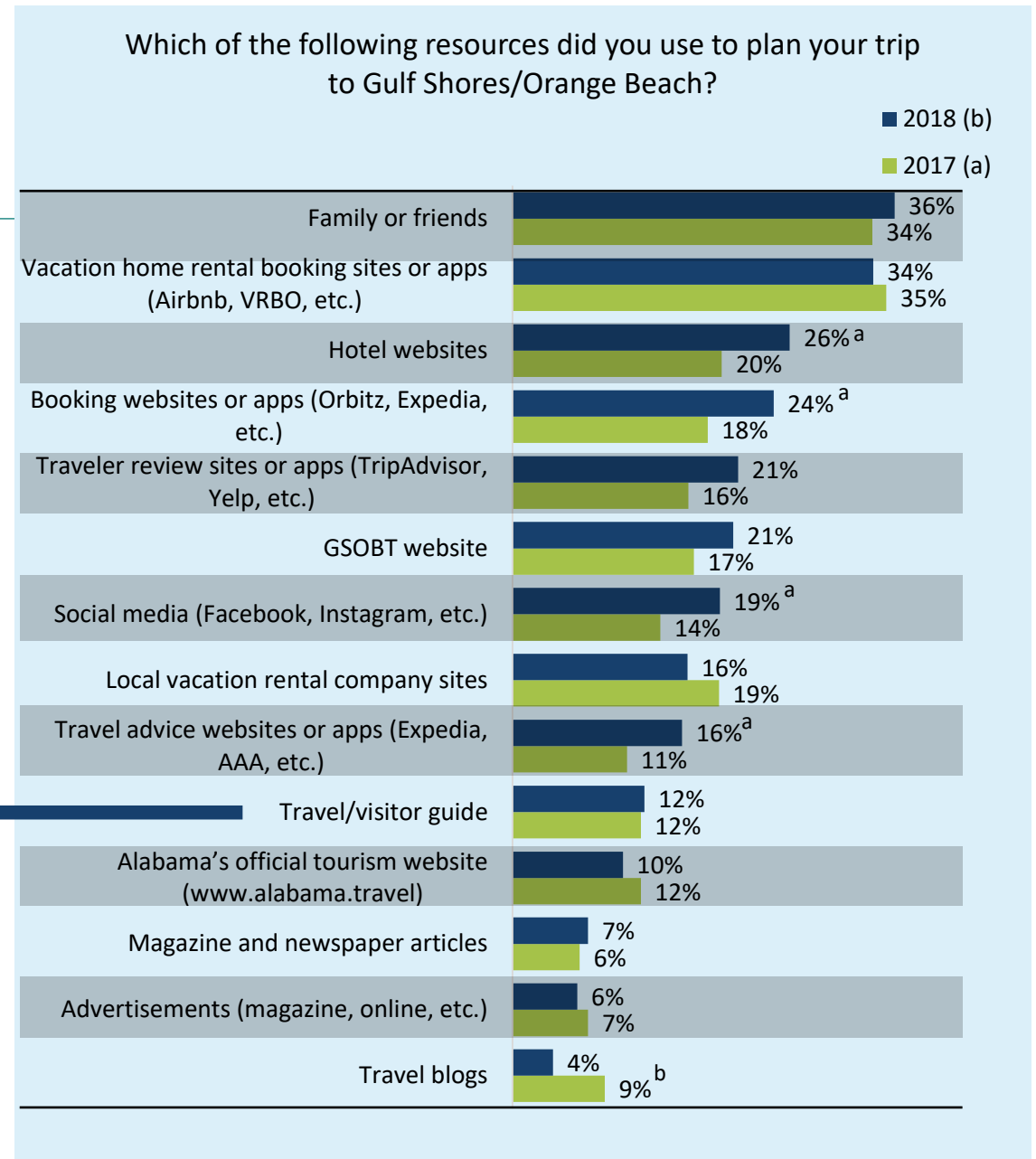
Question text: How far in advance did you book your lodging in Gulf Shores/Orange Beach? Response options as shown in graph above.

# Travel Planning

- The top fall visit planning resources remain homesharing sites and family and friends, as we saw in summer. Recent trips made more use than 2017 trips of hotel websites, online booking websites, and social media.
- These changes are reflective of a higher share of hotel stays.
- Just over 10% of visitors use the visitor guide, and most download the digital version.



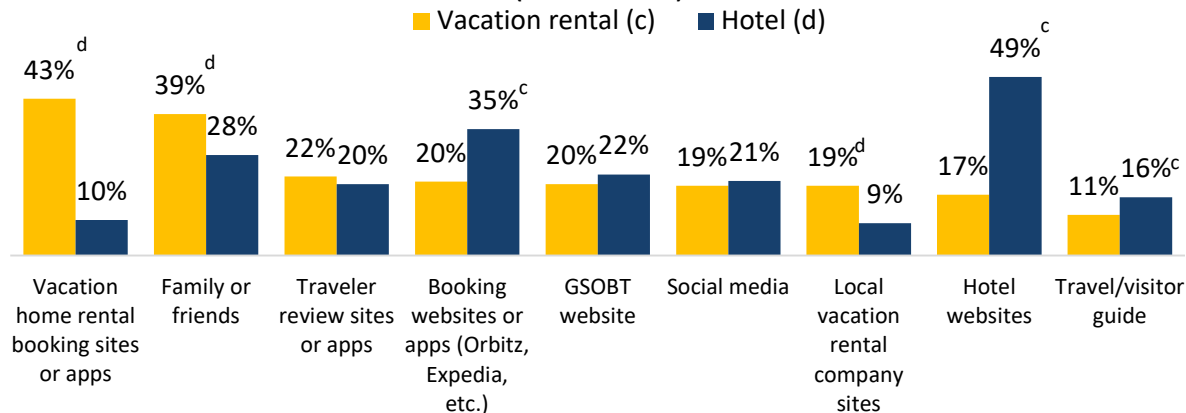
Question text: Which of the following resources did you use to plan your trip to Gulf Shores/Orange Beach? Response options as shown in graph.  
 You mentioned you used a travel/visitor guide to plan your Gulf Shores/Orange Beach trip. In what format did you access the guide?



# Travel Planning – Hotel vs. Condo Rental

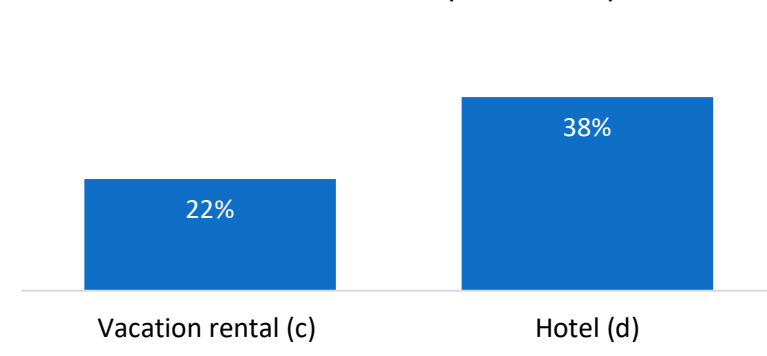
- Notably, GSOBT ran an Expedia co-op campaign in September and October of 2018, which helps explain the lift in use of booking websites/apps in fall.
- Some differences in trip planning resources by lodging type are intuitive – those who stay in vacation rentals use vacation rental sites and apps more, and those who stay in hotels use hotel sites more.
- Hotel users also rely more booking websites or apps, as well as the visitor guide. Hotel users are twice as likely as vacation rental stayers to visit a GS/OB Welcome Center.

**Trip planning resources with biggest difference by lodging type (2018 data)**



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 (2018 data)**



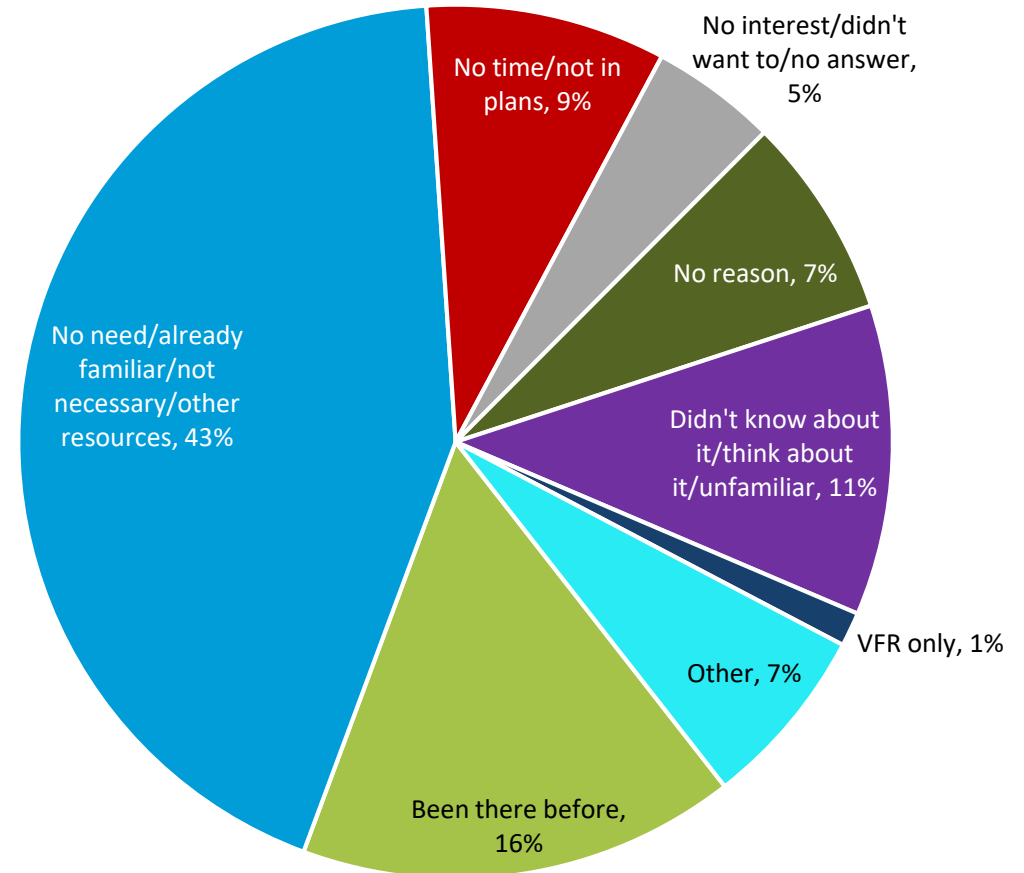
Vacation rental/condo n= 162 (c); Hotel/motel n=235 (d); c / d indicate statistically significant differences at the 95% level.

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.

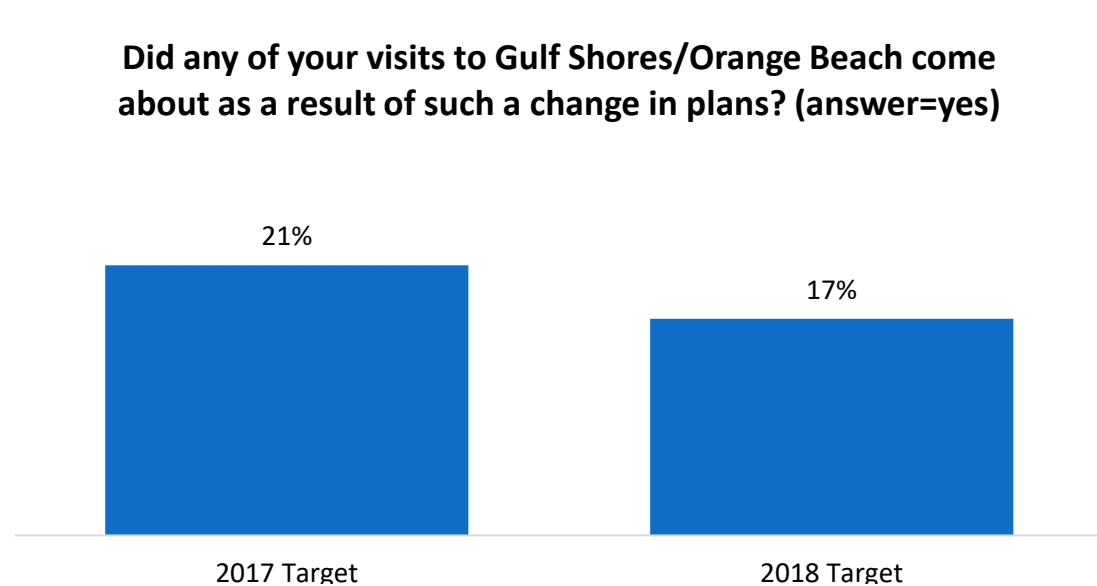
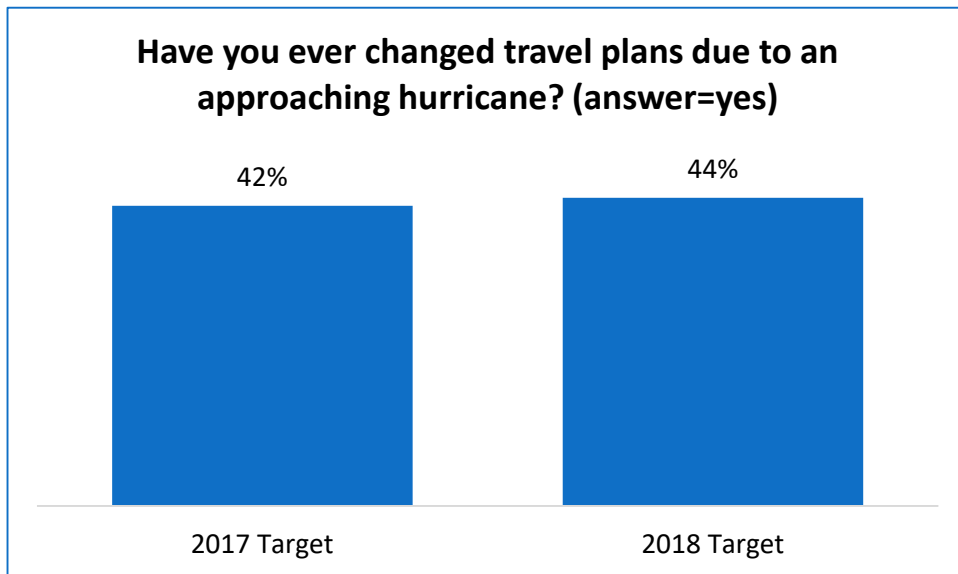
Why didn't you visit the welcome center? (2018)



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

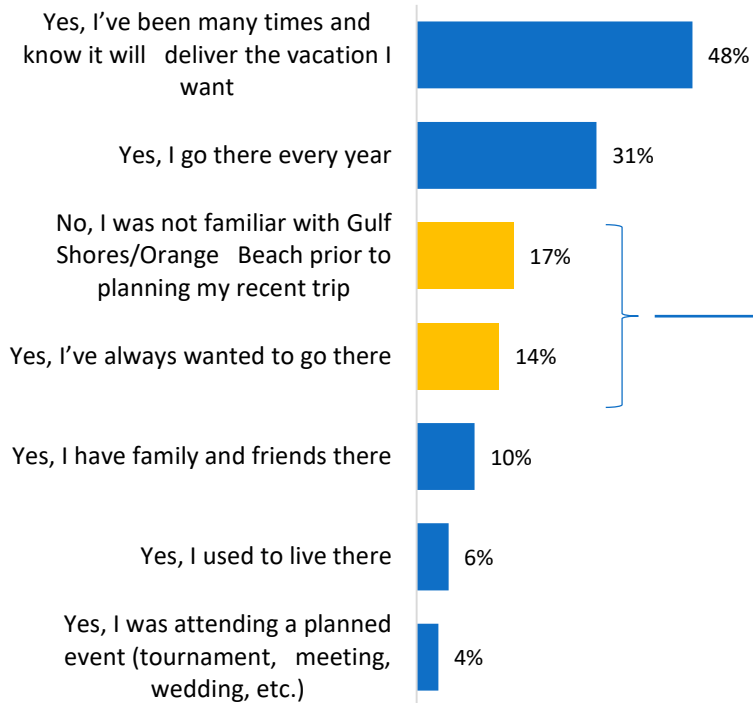
# Travel Planning – Hurricanes

- A new question was added in this wave of research to explore the impact of extreme weather on leisure travel in general, and specifically on travel to GS/OB.
- Roughly four in ten fall visitors say they have changed plans due to a hurricane.
- 17% of fall 2018 visitors say their travel to GS/OB resulted from plans changed due to hurricane activity elsewhere.

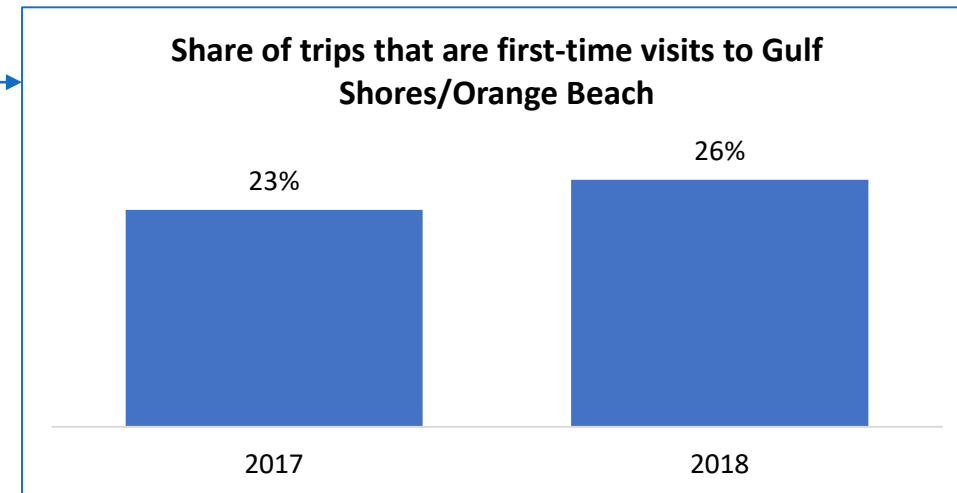


# Trip Characteristics

## Prior to this visit, was Gulf Shores/ Orange Beach familiar to you? (2018 data)



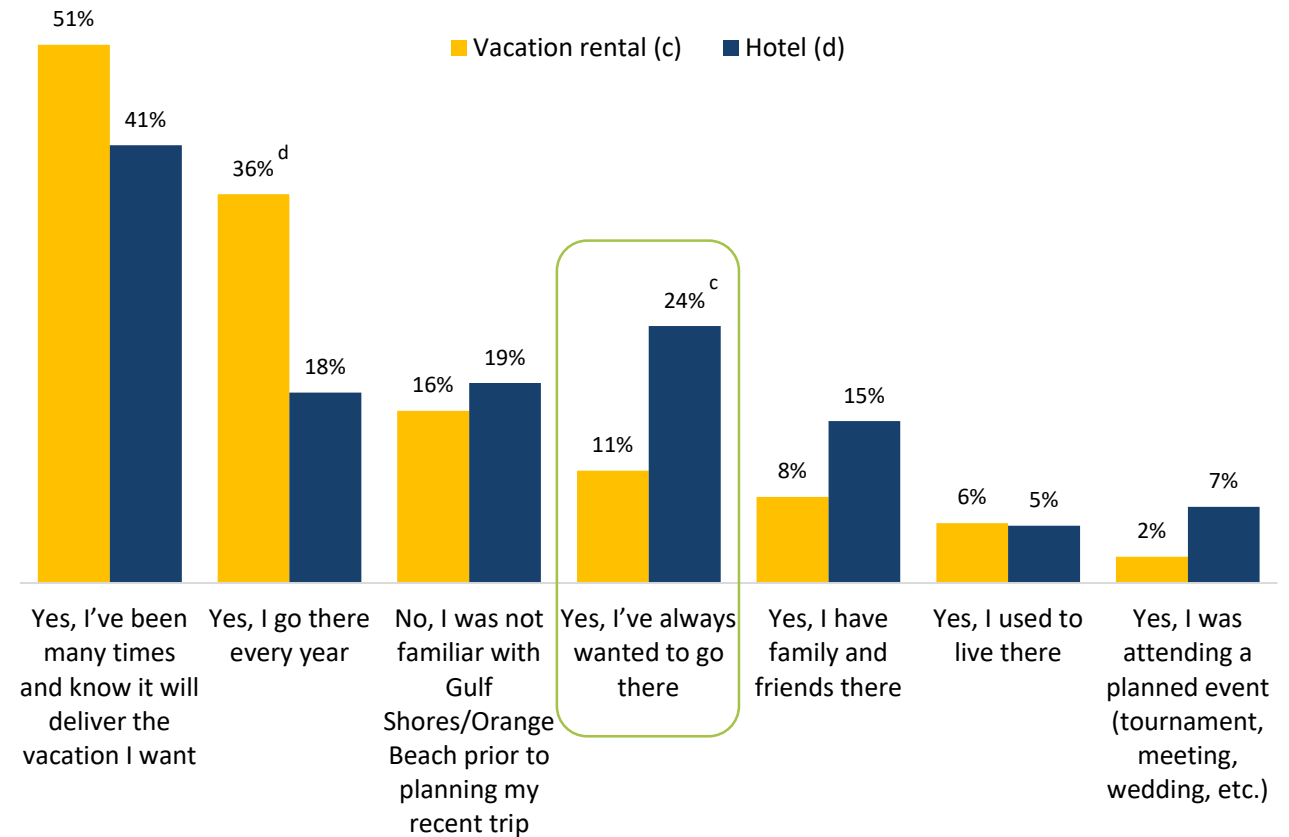
- Most GS/OB trips are repeat visits from those who are familiar with the destination.
- However, compared to summer, a higher share of fall trips are first-time visits to the area. This less busy season may be a trial visit, and an opportunity for GSOBT to introduce new travelers to the community, to generate future repeat visits. This is consistent with the higher share of hotel stays, which has increased as more hotel rooms have come online in 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 than vacation rental users to be: aspirational (always wanted to go there).

### Differences in Reasons for Familiarity (2018 data)



Vacation rental/condo n= 162 (c); Hotel/motel n=235 (d); c / d indicate statistically significant differences at the 95% level.

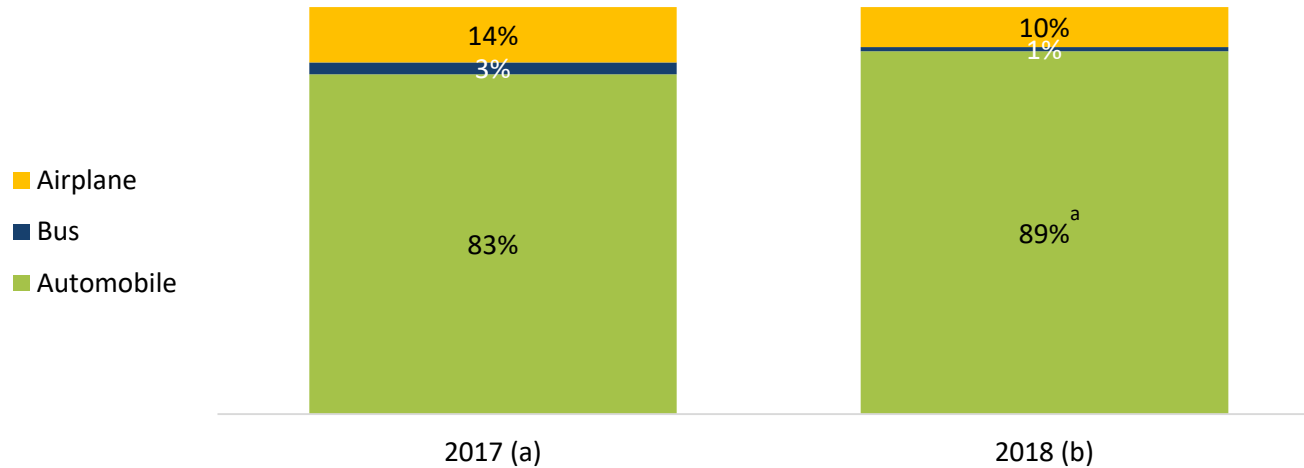
Question text: Prior to your visit, was Gulf Shores/Orange Beach familiar to you? Response options as shown in graph above.



# Trip Characteristics

- The majority of fall visitors drive to GS/OB. The main source markets of those who flew in fall 2018 are Houston, Dallas, and Atlanta.
- Of those who flew, two thirds flew into Pensacola.

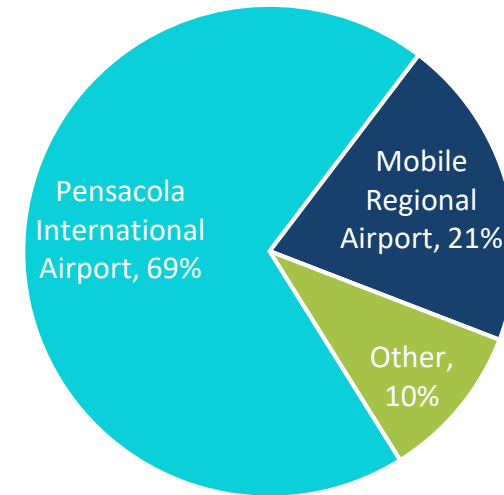
How did you get to Gulf Shores/Orange Beach?



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.

a indicates statistically significant difference at the 95% level.

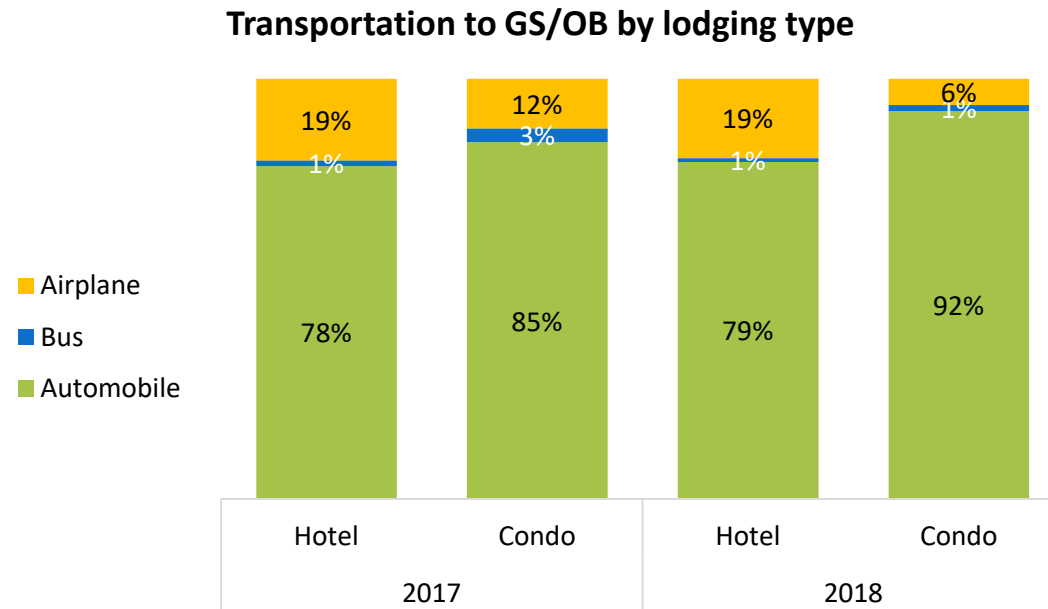
Into which airport did you fly? (2018 data)



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

# Trip Characteristics

- Hotel stayers are more likely to fly than those who use condo/vacation rentals. Hotel stayers are more likely than condo stayers to fly into Pensacola.



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.

# Trip Characteristics

- Seven in 10 fall visits included a beach visit, followed by dining, swimming, and relaxing.
- About half of trips included shopping.

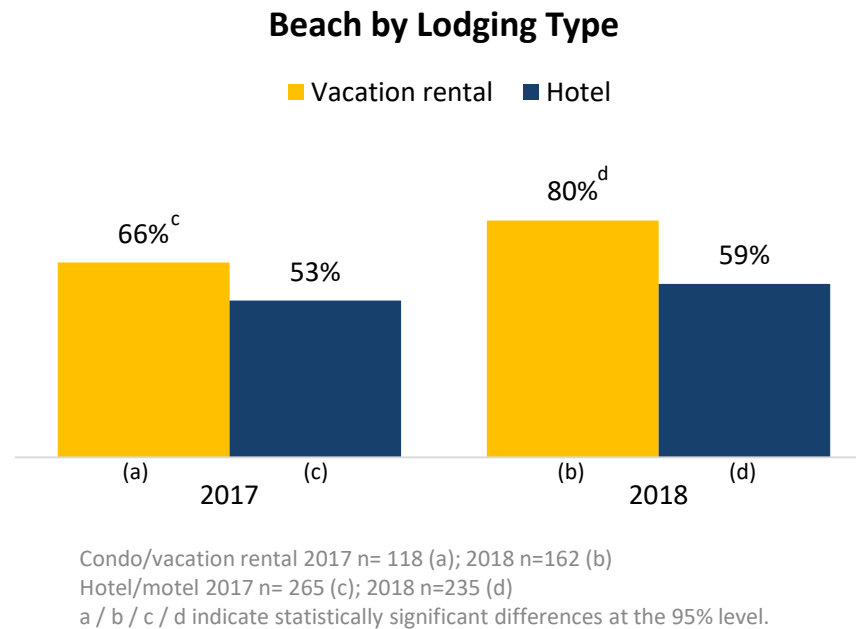
Fall trip participation	2017 (a)	2018 (b)
Beaches	63%	74% <sup>a</sup>
Dining out	59%	66% <sup>a</sup>
Relaxing	56%	63% <sup>a</sup>
Shopping	49%	57% <sup>a</sup>
Swimming	48%	45%
Sightseeing	29%	34%
Tanger Outlets	26%	30%
Bars/Nightlife	18%	19%
Gulf State Park	16%	17%
The Wharf	14%	17%
Watching wildlife	14%	16%
Fishing	19%	15%
Photography	11%	15%
Shelling	16%	15%
Historical sites	12%	12%
Dauphin Island	13%	11%
Family/friends reunion	13%	11%
Dolphin tour	10%	10%
Concerts and nightlife	13%	10%
Alabama's Coastal Connection Scenic Byway	9%	10%
Exercise/working out	14%	10%
Visiting friends/relatives in the area	8%	10%
Alabama Gulf Coast Zoo	10%	9%
Boating or sailing	8%	9%
Festivals or special events	7%	9%
Adventure Island	8%	9%

Cont'd.	2017 (a)	2018 (b)
Hiking on trails	9%	9%
The Track	10%	8%
Battleship USS Alabama	7%	8%
Birdwatching	6%	8%
Bicycle riding	5%	7%
Fort Morgan Historic Site	9%	7%
Kayaking/canoeing/paddle boarding	10%	6%
Scuba diving/snorkeling	3%	6% <sup>a</sup>
Golfing	8%	6%
Sporting events	4%	6%
Visiting a spa	9%	6%
National Naval Aviation Museum	4%	6%
Bon Secour National Wildlife Refuge	5%	5%
Parasailing/jet skiing	6%	5%
OWA Park	2%	4% <sup>a</sup>
Bellingrath Gardens	5%	3%
Hugh S. Branyon Backcountry Trail	6%	3%
Waterville	3%	3%
Tennis	5% <sup>b</sup>	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.

# Trip Characteristics

- As we have seen in other seasons, vacation renters are more likely to feature beach visits in their trip.



Question text: What attractions and activities did you visit or participate in while in Gulf Shores/Orange Beach on your trip? Response chosen: beach

# Trip Characteristics

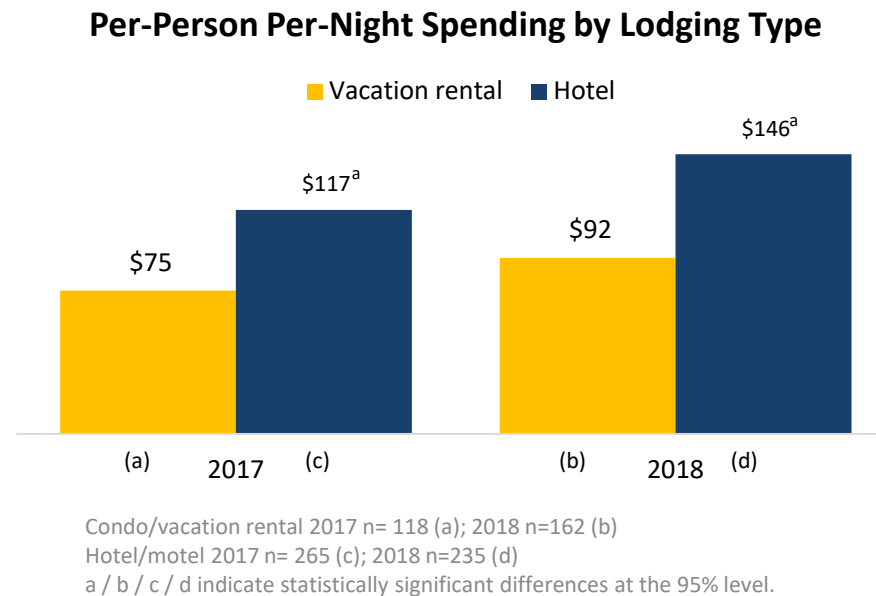
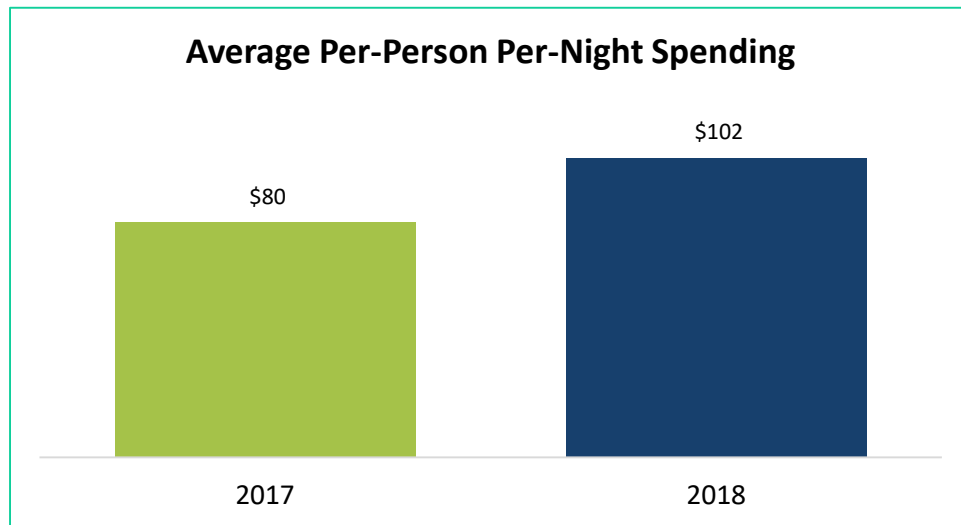
- Just over half of GS/OB fall visits are motivated by the beach, meaning that visitors chose the destination because of this asset.
- Four in 10 visitors said the area was their choice due to the opportunity it provides for relaxation. This is a similar share we saw in summer.

Top fall trip motivators	2017	2018
Beaches	53%	58%
Relaxing	38%	43%
Dining out	20%	23%
Swimming	18%	15%
Shopping	13%	13%
Tanger Outlets	9%	12%
Sightseeing	9%	10%
Bars/Nightlife	5%	8%
Family/friends reunion	10%	8%
Fishing	8%	7%

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

- Fall 2018 saw higher visitor spending than Fall 2017. Hotel spending brings the per-person per-night figure up. And a higher share of hotel stays (and more hotel rooms coming online) helps drive the increase in overall unit spending. This could also have been impacted by the fall Expedia co-op, which promoted hotel stays.
- The per-person efficiency of vacation rentals is one of the appeals for larger groups.



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

- Visitor spending is up this year, although each spending category represents nearly the same share of spending as in 2017.

Average Travel Party Expenditures per Trip – FALL	2017 (a)		2018 (b)	
	Spending	% of total	Spending	% of total
Lodging	\$802	46%	\$892	46%
Meals/food/groceries	\$381	22%	\$397	21%
Shopping	\$259	15%	\$347	18%
Recreation or entertainment	\$175	10%	\$184	10%
Transportation within Gulf Shores	\$70	4%	\$74	4%
Other	\$43	2%	\$36	2%
<b>TOTAL</b>	<b>\$1,729</b>		<b>\$1,930</b>	

2017 n= 383 (a); 2018 n=397 (b).

Average Travel Party Expenditures per Trip – FALL	2017		2018	
	Vacation rental (a)	Hotel (b)	Vacation rental (c)	Hotel (d)
Lodging	\$886 <sup>bd</sup>	\$475	\$1,023 <sup>bd</sup>	\$558
Meals/food/groceries	\$405 <sup>b</sup>	\$288	\$426 <sup>d</sup>	\$322
Shopping	\$261	\$251	\$305	\$455
Recreation or entertainment	\$174	\$179	\$181	\$193
Transportation within Gulf Shores	\$63	\$96	\$71	\$82
Other	\$38	\$64	\$36	\$37
<b>TOTAL</b>	<b>\$1,826</b>	<b>\$1,354</b>	<b>\$2,041<sup>b</sup></b>	<b>\$1,647</b>

Condo/vacation rental 2017 n= 118 (a); 2018 n=162 (b)

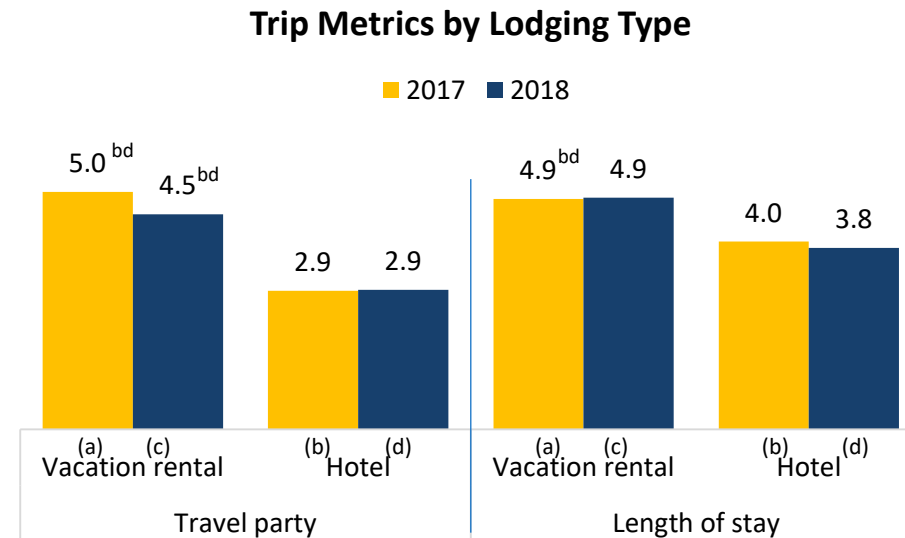
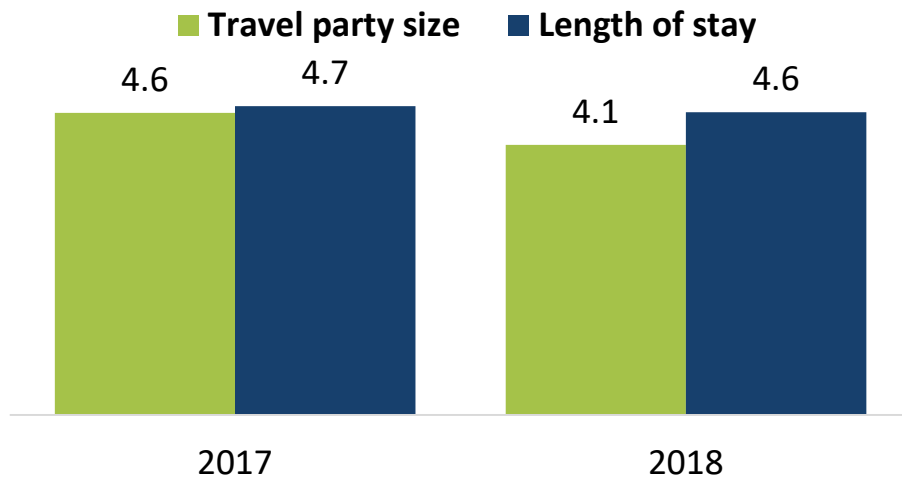
Hotel/motel 2017 n= 265 (c); 2018 n=235 (d)

a / b / c / d 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

- Travel party size and length of stay are consistent year over year.
- Condo/vacation rental visitors stay longer and visit with larger travel parties than those who stay in hotels.



Condo/vacation rental 2017 n= 118 (a); 2018 n=162 (b)  
 Hotel/motel 2017 n= 265 (c); 2018 n=235 (d)  
 a / b / c / d indicate statistically significant differences at the 95% level.

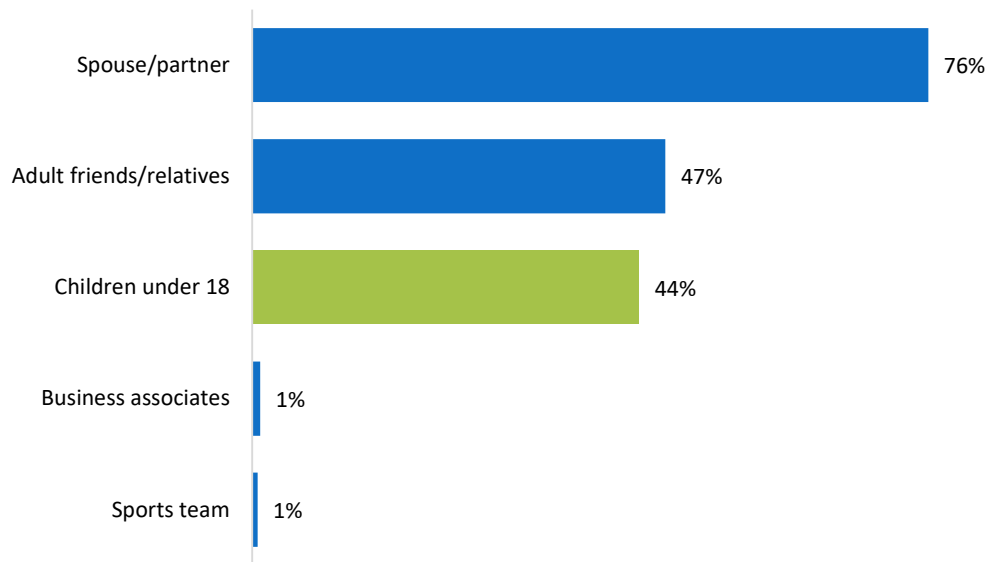
Question text: Including yourself, how many people were in your travel party? How many nights did you stay in Gulf Shores/Orange Beach during this trip? If you did not stay overnight, please enter '0'. Open-ended numeric responses.



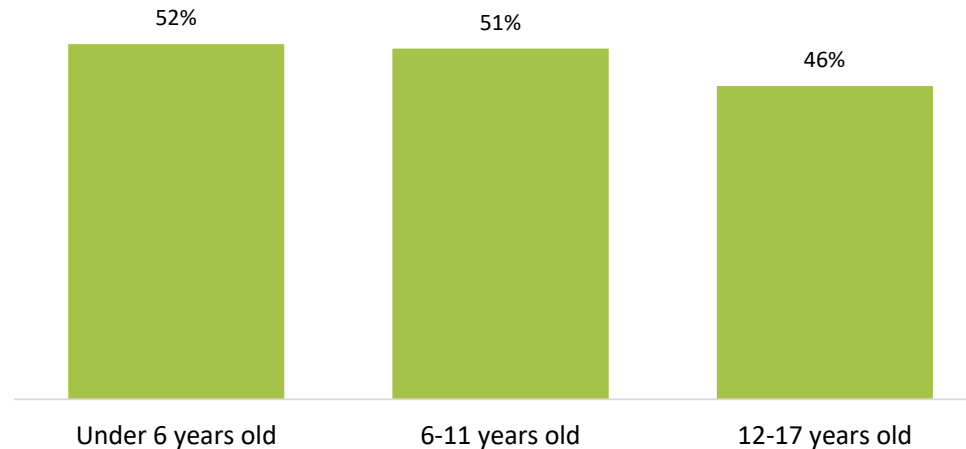
# Travel Party Characteristics

- More than 4 in 10 fall travel parties included children. The ages of the visiting children varied.

Who traveled with you on this trip? (2018 data)



Ages of Children (of travel parties with kids)



Question text: What ages were the children in your travel party? Response options as shown in graph above. 2017 travel parties with kids is a small sample size (n=13), so that year is omitted.

# Travel Party Characteristics

- Overall, in terms of demographics, visitors look similar year-over-year:
  - The majority of travel decision makers are female
  - Seven in 10 are married
  - Average household income is over \$110K

Year-over-Year Demographic Profile FALL VISITORS		2017 (a)	2018 (b)
Gender	Male	40% <sup>b</sup>	34%
	Female	60%	66%
Age	Average	46	48 <sup>a</sup>
Marital status	Married	72%	72%
	Divorced/Separated	8%	9%
	Single/Never married	16%	16%
	Widowed	4%	3%
HH income	Average	\$110,200	\$119,571

2017 n= 383 (a); 2018 n=397 (b); 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)

# Travel Party Characteristics

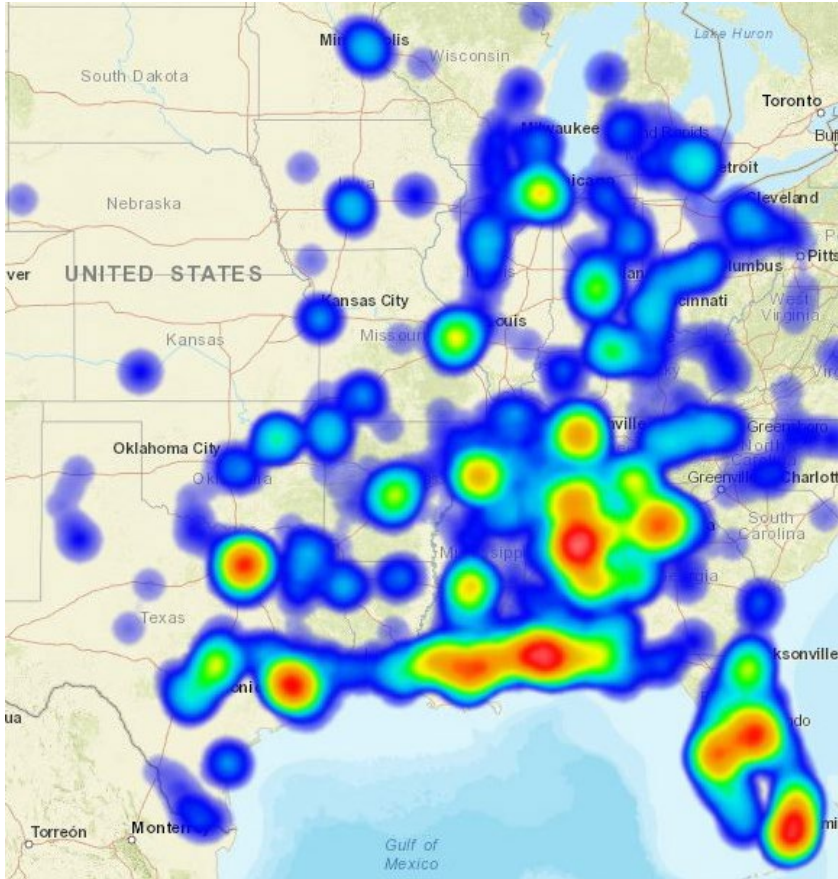
- There is less demographic difference between hotel and vacation rental stayers in fall than in prior seasons.
- More recent hotel visitors have higher incomes, pointing to higher quality visitors coming to GSOBT, and staying in hotels.

Fall demographic profile by lodging type		2017		2018	
		Vacation rental/condo (a)	Hotel (b)	Vacation rental/condo (c)	Hotel (d)
Gender	Male	40%	40%	31%	37%
	Female	60%	60%	69%	63%
Age	Average	46	44	48	48 <sup>bc</sup>
Marital status	Married	77%	70%	71%	72%
	Divorced/Separated	9%	8%	11%	7%
	Single/Never married	12%	18%	16%	17%
	Widowed	3%	5%	2%	4%
HH income	Average	\$115,231 <sup>bc</sup>	\$107,979	\$114,957 <sup>b</sup>	\$122,732 <sup>bc</sup>
Education	College grad+	57%	56%	67%	64%
Occupation	Executive/upper management	14%	24% <sup>ad</sup>	12%	20%
	IT professional	11% <sup>b</sup>	8%	5%	8%
	Educator	3%	3%	7%	8% <sup>a</sup>
	Homemaker	7%	9%	9%	9%
	Student	1%	1%	1%	2%
	Small business owner	7%	5%	9%	4%
	Skilled trade/service	8%	9%	7%	9%
	Other	21%	17%	21%	16%
	Retired	25%	17%	28% <sup>b</sup>	20%
	Not currently employed	3%	6%	1%	5%
Ethnicity	Caucasian/White	93%	86%	93%	84%
	African-American/Black	3%	5%	6%	10%
	Latino/Hispanic	3%	7%	2%	5%
	Asian	1%	4%	0%	4%
	American Indian	0%	1%	0%	3%
	Other	1%	1%	0%	1%

Condo/vacation rental 2017 n= 118 (a); 2018 n=162 (b)  
 Hotel/motel 2017 n= 265 (c); 2018 n=235 (d)  
 a / b / c / d indicate statistically significant differences at the 95% level.

# Travel Party Characteristics

- Heat map showing source markets of fall visitors (2018 data)

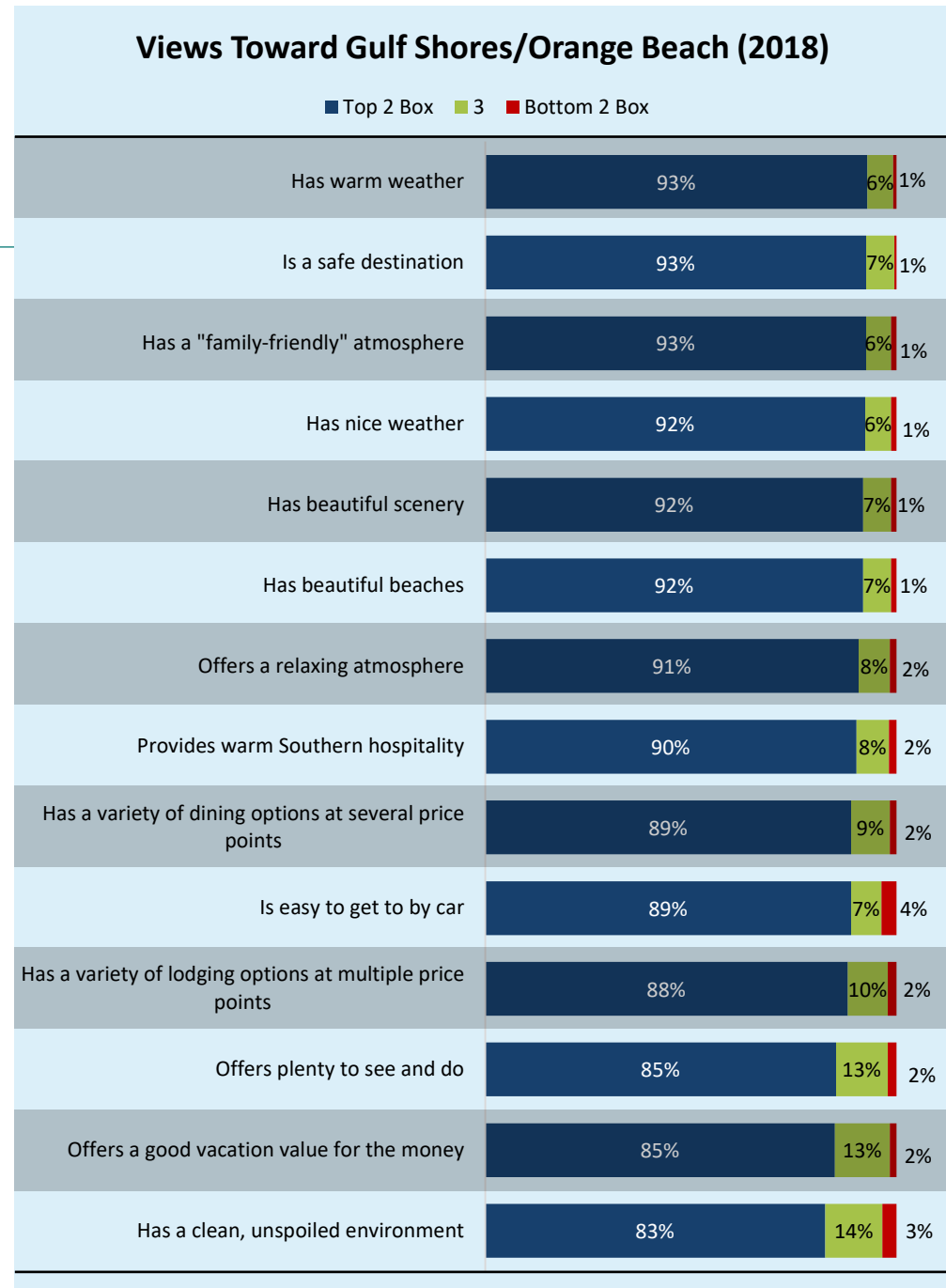


	2017	2018
Alabama	13%	17%
Florida	20%	15%
Tennessee	9%	9%
Texas	13%	9%
Louisiana	6%	8%
Georgia	7%	7%
Mississippi	4%	7%
Arkansas	3%	4%
Kentucky	3%	4%
Illinois	3%	2%
Missouri	5%	2%
Ohio	3%	2%
Michigan	2%	2%
Oklahoma	1%	2%
Virginia	0%	2%
Indiana	4%	2%

# Views Toward GS/OB & Trip Satisfaction

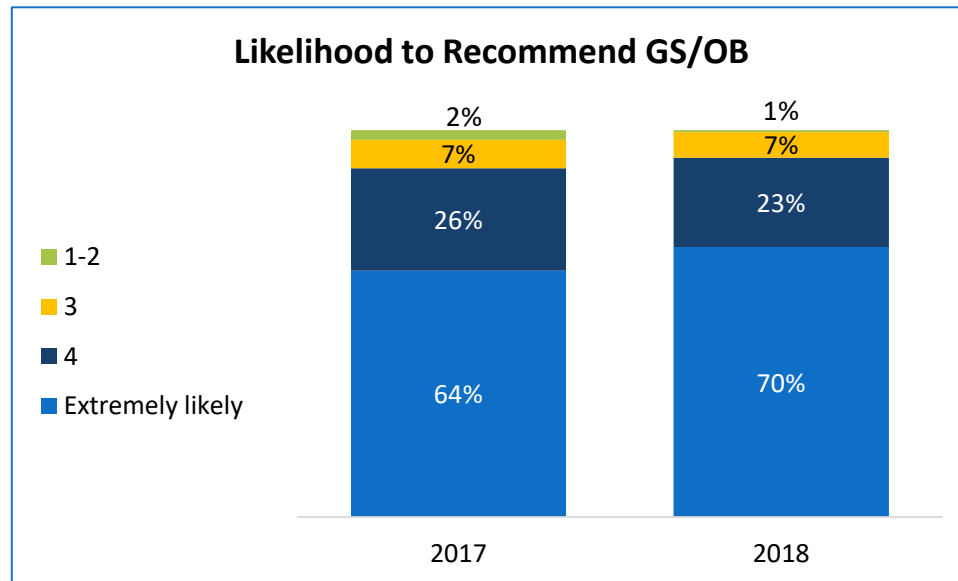
- Ratings of GS/OB by fall visitors are very positive, with the warm weather receiving the highest rating.

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. In fact, fall recommendation intent is higher than summer.
- Likelihood to recommend is high across lodging types.



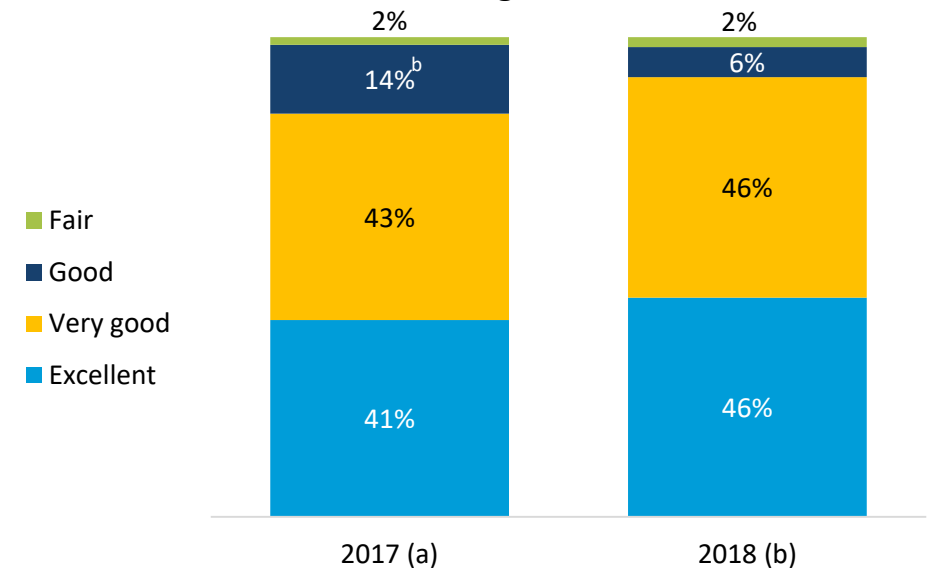
How likely are you to recommend Gulf Shores/Orange Beach to your friends or family as a destination to visit for a leisure trip? fall visitors	2017 Top 2 Box %	2018 Top 2 Box %
Vacation rental/condo	91%	94%
Hotel	90%	93%

Condo/vacation rental 2017 n= 118 (a); 2018 n=162 (b)  
 Hotel/motel 2017 n= 265 (c); 2018 n=235 (d)  
 a / b / c / d indicate statistically significant differences at the 95% level.

# Views Toward GS/OB & Trip Satisfaction

- The destination receives positive ratings for its quality of service.
- No fall visitors rated the area “poor.”
- This will be tracked to gauge whether seasonal staffing challenges are reflected in the satisfaction metric.

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

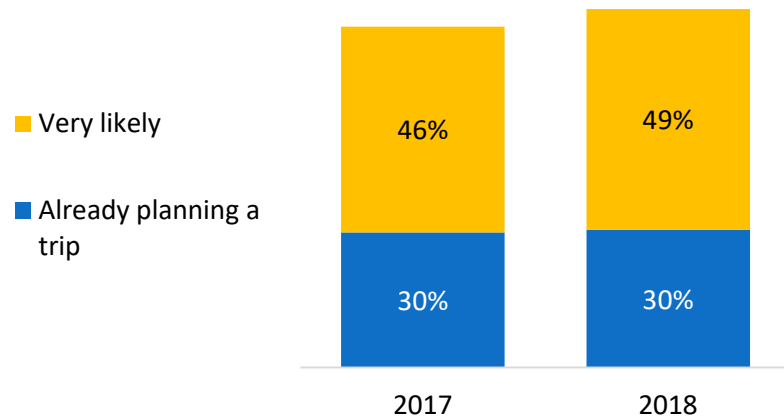


Question text: Overall, how would you rate the quality of the service you received at stores, restaurants, attractions, and lodging establishments in Gulf Shores/Orange Beach? Response options: Poor, Fair, Good, Very good, Excellent

# Views Toward GS/OB & Trip Satisfaction

- As with other measures of satisfaction, likelihood to return to the area remains high.
- Repeat visitors plan to continue visiting. And those new to the area are becoming repeat visitors.
- Among fall visitors, visit intent is as high among first-time visitors as it is among repeat visitors.

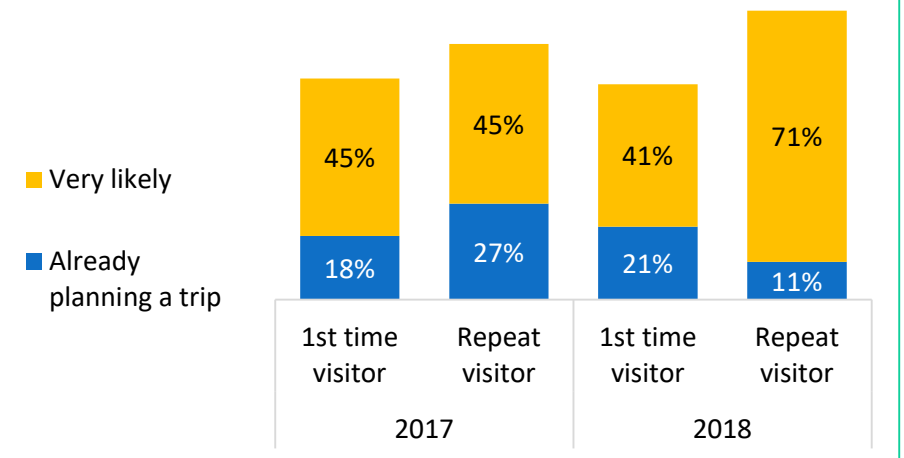
Likely to Return to GS/OB in the Next Year



Already planning a trip (2018)

I've been many times and know it will deliver the vacation I want	53%
I go there every year	44%
I've always wanted to go there	15%
I was not familiar with Gulf Shores/Orange Beach prior to planning my recent trip	8%

Likelihood to visit GS/OB in the next year



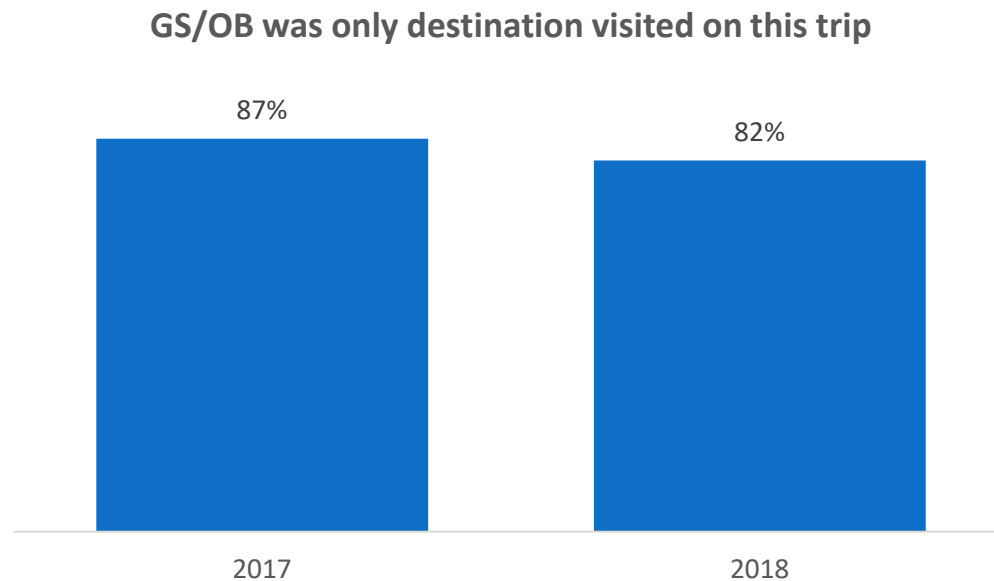
Question text: How likely are you to visit Gulf Shores/Orange Beach in the next year? Response options: Not at all likely, Not very likely, Somewhat likely, Very likely, Already planning a trip



# Destinations Visited

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- Most visitors do not include other destinations during their GS/OB trip. Eight in 10 fall travelers visit only GS/OB.





# Appendix

Visitor Profile Research – Fall 2018

# Comparing Target to Other Travelers

- Non-target trips are divided into three groups: those who visit for the day only, those who stay overnight but do not use paid lodging, and those who stay long-term (more than 30 nights).
- Sample sizes for each of these individual groups are small, since the overall non-target sample is 100. Identifying long-term visitors has been challenging, in part because those who come to the area for a month or more at a time often do not consider the stay a “leisure trip” and do not think of themselves as travelers; rather, this is their lifestyle and they live in the area part of the year.
- In this wave of research 93 long-term fall visitors were surveyed. Because these people visit annually, and due to the small sample size when they are divided across years, their data is presented as a single unit in this report.

Non-target trip type	Day trip	No paid lodging
2017	107	82
2018	59	41
30+ night stay	93	

Non-target fall trips	Day trip		No paid lodging		30+ night stay (e)
	2017 (a)	2018 (b)	2017 (c)	2018 (d)	
Length of stay	0	0	4.5	4.4	40
Average # visits/year	4.6	5.3	5.4	5.2	4.0
First time trips	34%	27%	16%	22%	24%

2017 day trip n=107 (a); 2018 day trip n=59 (c); 2017 no paid lodging n=82 (b); 2018 no paid lodging n=41 (d); 30+ night stay n=93 (e)

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

# Comparing Target to Other Travelers

Began planning fall trip	2017			2018			Non-target 30+ night stay (g)
	Target travelers (a)	Non-target Day trip (b)	Non-target No paid lodging (c)	Target travelers (d)	Non-target Day trip (e)	Non-target No paid lodging (f)	
< 1 week before trip	6%	32% <sup>ad</sup>	20% <sup>ad</sup>	5%	46% <sup>acdfg</sup>	10%	15% <sup>ad</sup>
1-2 weeks	12%	10%	13%	11%	14%	7%	26% <sup>ad</sup>
3 weeks - 1 month	24%	20%	26%	18%	14%	34%	23%
2 - 3 months	27%	21%	22%	32%	20%	24%	25%
4-6 months	17% <sup>bg</sup>	5%	13%	18% <sup>bg</sup>	0%	15%	5%
6+ months	14%	12%	6%	16%	7%	10%	6%

GS/OB is only destination visited on this trip	2017			2018			Non-target 30+ night stay (g)
	Target travelers (a)	Non-target Day trip (b)	Non-target No paid lodging (c)	Target travelers (d)	Non-target Day trip (e)	Non-target No paid lodging (f)	
	87% <sup>b</sup>	75%	82%	82%	76%	76%	80%

2017 target n= 383 (a); 2017 day trip n=107 (b); 2017 no paid lodging n=82 (c); 2018 target n=397 (d); 2018 day trip n=59 (e); 2018 no paid lodging n=41 (f); 30+ night stay n=93 (g)  
a / b / c / d / e / f / g 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			Non-target 30+ night stay (g)
	Target travelers (a)	Non-target Day trip (b)	Non-target No paid lodging (c)	Target travelers (d)	Non-target Day trip (e)	Non-target No paid lodging (f)	
Family or friends	34%	39%	38%	36%	32%	37%	51%
Social media	14%	11%	12%	19%	12%	17%	15%
Booking websites or apps	18%	14%	11%	24% <sup>e</sup>	7%	10%	28% <sup>e</sup>
Hotel websites	20%	16%	12%	26%	20%	10%	32% <sup>c</sup>
Gulf Shores & Orange Beach Tourism website	17%	11%	5%	21% <sup>c</sup>	12%	15%	20%
Local vacation rental company sites	19% <sup>bc</sup>	7%	4%	16%	5%	5%	13%
Travel advice websites or apps	11%	5%	12%	16% <sup>b</sup>	8%	7%	22% <sup>b</sup>
Vacation home rental booking sites/apps	35% <sup>bcefg</sup>	8%	6%	34% <sup>bcefg</sup>	3%	2%	16%
Travel/visitor guide	12%	11%	9%	12%	14%	5%	20%
Traveler review sites or apps	16%	12%	5%	21% <sup>c</sup>	8%	10%	15%
Travel blogs	9%	5%	4%	4%	3%	2%	14% <sup>d</sup>
Alabama's official tourism website	12%	7%	5%	10%	3%	0%	18% <sup>f</sup>
Magazine and newspaper articles	6%	4%	2%	7%	2%	0%	9%
Advertisements	7%	8%	4%	6%	7%	0%	13%

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= 383 (a); 2017 day trip n=107 (b); 2017 no paid lodging n=82 (c); 2018 target n=397 (d); 2018 day trip n=59 (e); 2018 no paid lodging n=41 (f); 30+ night stay n=93 (g)  
a / b / c / d / e / f / g indicate statistically significant differences at the 95% level.

# Comparing Target to Other Travelers

Children on trip	2017			2018			Non-target 30+ night stay (g)
	Target travelers (a)	Non-target Day trip (b)	Non-target No paid lodging (c)	Target travelers (d)	Non-target Day trip (e)	Non-target No paid lodging (f)	
% of trips with children	39%	50%	14%	41%	11%	37%	49%
Of trips with children: 2017 target n=13, day trip n=2; no paid lodging n=1; 2018 target n=143, day trip n=4, no paid lodging n=10; 30+ night stay n=46							
< 6 years old	35%	22%	50%	49%	67%	60%	47%
6-11 years old	44%	44%	50%	50%	33%	40%	48%
12-17 years old	52%	56%	50%	47%	33%	30%	39%

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			Non-target 30+ night stay (g)
	Target travelers (a)	Non-target Day trip (b)	Non-target No paid lodging (c)	Target travelers (d)	Non-target Day trip (e)	Non-target No paid lodging (f)	
Automobile	83% <sup>g</sup>	81%	79%	89% <sup>g</sup>	95% <sup>fg</sup>	73%	62%
Bus	3%	6%	2%	1%	2%	0%	2%
Airplane	14%	13%	17%	10%	3%	15%	34% <sup>abde</sup>
Other	0%	0%	1%	0%	0%	12% <sup>adg</sup>	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= 383 (a); 2017 day trip n=107 (b); 2017 no paid lodging n=82 (c); 2018 target n=397 (d); 2018 day trip n=59 (e); 2018 no paid lodging n=41 (f); 30+ night stay n=93 (g)  
a / b / c / d / e / f / g indicate statistically significant differences at the 95% level.

# Comparing Target to Other Travelers

	2017			2018			Non-target 30+ night stay (g)
	Target travelers (a)	Non-target Day trip (b)	Non-target No paid lodging (c)	Target travelers (d)	Non-target Day trip (e)	Non-target No paid lodging (f)	
Travel party size	4.6 <sup>bcdg</sup>	3.1	2.6	4.1	3.6	2.8	2.9

Trip spending	2017			2018			Non-target 30+ night stay (g)
	Target travelers (a)	Non-target Day trip (b)	Non-target No paid lodging (c)	Target travelers (d)	Non-target Day trip (e)	Non-target No paid lodging (f)	
Lodging	\$802 <sup>bcefg</sup>	\$ -	\$ -	\$892 <sup>bcefg</sup>	\$ -	\$ -	\$475
Meals/food/groceries	\$381 <sup>bceg</sup>	\$155	\$198	\$397 <sup>bceg</sup>	\$144	\$219	\$233
Shopping	\$259	\$130	\$157	\$347	\$89	\$170	\$286
Recreation or entertainment	\$175	\$116	\$123	\$184	\$59	\$93	\$186
Transportation within Gulf Shores	\$70	\$64	\$85	\$74	\$23	\$34	\$108
Other	\$43	\$28	\$86	\$36	\$30	\$19	\$89
TOTAL	\$1,729 <sup>bcef</sup>	\$493	\$648	\$1,930 <sup>bcef</sup>	\$345	\$536	\$1,378 <sup>be</sup>
<b>Per person spending</b>	<b>\$377</b>	<b>\$157</b>	<b>\$252</b>	<b>\$471</b>	<b>\$95</b>	<b>\$189</b>	<b>\$468</b>

2017 target n= 383 (a); 2017 day trip n=107 (b); 2017 no paid lodging n=82 (c); 2018 target n=397 (d); 2018 day trip n=59 (e); 2018 no paid lodging n=41 (f); 30+ night stay n=93 (g)  
a / b / c / d / e / f / g 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		2017			2018			Non-target 30+ night stay (g)
		Target travelers (a)	Non-target Day trip (b)	Non-target No paid lodging (c)	Target travelers (d)	Non-target Day trip (e)	Non-target No paid lodging (f)	
Gender	Male	40% <sup>f</sup>	40%	27%	34%	29%	15%	44% <sup>f</sup>
	Female	60%	60%	73%	66%	71%	85% <sup>ag</sup>	56%
Age	Average	46	46	48	48 <sup>g</sup>	53 <sup>ag</sup>	50	42
Marital status	Married	72%	58%	60%	72%	75%	66%	73%
	Divorced/Separated	8%	21% <sup>ad</sup>	17%	9%	8%	12%	6%
	Widowed	4%	1%	5%	3%	5%	5%	3%
	Single/Never married	16%	20%	18%	16%	12%	17%	17%
HH income	Average	\$110,200	\$88,627	\$104,500	\$119,571	\$109,102	\$111,390	\$109,614

2017 target n= 383 (a); 2017 day trip n=107 (b); 2017 no paid lodging n=82 (c); 2018 target n=397 (d); 2018 day trip n=59 (e); 2018 no paid lodging n=41 (f); 30+ night stay n=93 (g)  
a / b / c / d / e / f / g 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			Non-target 30+ night stay (g)
	Target travelers (a)	Non-target Day trip (b)	Non-target No paid lodging (c)	Target travelers (d)	Non-target Day trip (e)	Non-target No paid lodging (f)	
Offers a relaxing atmosphere	92%	84%	91%	93%	81%	93%	87%
Is easy to get to by car	92% <sup>bg</sup>	75%	85%	91% <sup>bg</sup>	86%	83%	76%
Has beautiful beaches	92% <sup>b</sup>	78%	93% <sup>b</sup>	94% <sup>be</sup>	80%	80%	88%
Has a "family-friendly" atmosphere	91% <sup>b</sup>	79%	93% <sup>b</sup>	95% <sup>bg</sup>	83%	93%	83%
Is a safe destination	90% <sup>b</sup>	76%	85%	95% <sup>bg</sup>	83%	90%	82%
Has a clean, unspoiled environment	82%	71%	90% <sup>b</sup>	85% <sup>b</sup>	75%	83%	80%
Offers plenty to see and do	86% <sup>b</sup>	71%	90% <sup>b</sup>	85% <sup>b</sup>	80%	88%	85%
Has nice weather	91% <sup>b</sup>	79%	93% <sup>b</sup>	94% <sup>be</sup>	80%	90%	88%
Provides warm Southern hospitality	90% <sup>be</sup>	72%	85%	91% <sup>be</sup>	76%	85%	88% <sup>b</sup>
Has a variety of dining options at several price points	88% <sup>b</sup>	69%	91% <sup>b</sup>	90% <sup>b</sup>	80%	90% <sup>b</sup>	83%
Has a variety of lodging options at multiple price points	87% <sup>be</sup>	72%	80%	89% <sup>be</sup>	71%	90%	84%
Has beautiful scenery	91% <sup>b</sup>	79%	89%	93% <sup>be</sup>	80%	85%	88%
Has warm weather	92% <sup>b</sup>	78%	91% <sup>b</sup>	95% <sup>bg</sup>	90%	88%	84%
Offers a good vacation value for the money	84% <sup>be</sup>	69%	88% <sup>be</sup>	87% <sup>be</sup>	68%	88%	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

2017 target n= 383 (a); 2017 day trip n=107 (b); 2017 no paid lodging n=82 (c); 2018 target n=397 (d); 2018 day trip n=59 (e); 2018 no paid lodging n=41 (f); 30+ night stay n=93 (g)  
a / b / c / d / e / f / g indicate statistically significant differences at the 95% level.

# Comparing Target to Other Travelers

Overall experience	2017			2018			Non-target 30+ night stay (g)
	Target travelers (a)	Non-target Day trip (b)	Non-target No paid lodging (c)	Target travelers (d)	Non-target Day trip (e)	Non-target No paid lodging (f)	
<b>Top 2 Box Rating</b>	89%	69%	88%	93% <sup>b</sup>	68%	88%	85%
5 (Excellent)	51%	35%	43%	53%	36%	56%	52%
4 (Very good)	38%	35%	45%	40%	32%	32%	33%
3 (Good)	9%	26% <sup>ad</sup>	11%	6%	31% <sup>adg</sup>	12%	11%
2 (Fair)	2%	3%	1%	1%	2%	0%	4%
1 (Poor)	0%	2% <sup>a</sup>	0%	0%	0%	0%	0%

Likelihood to recommend	2017			2018			Non-target 30+ night stay (g)
	Target travelers (a)	Non-target Day trip (b)	Non-target No paid lodging (c)	Target travelers (d)	Non-target Day trip (e)	Non-target No paid lodging (f)	
<b>Top 2 Box Rating</b>	90% <sup>b</sup>	77%	94%	94% <sup>b</sup>	80%	98%	91%
5 (Extremely likely)	70%	50%	71%	74%	58%	71%	66%
4	21%	26%	23%	19%	22%	27%	26%
3	6%	16% <sup>ad</sup>	5%	6%	14%	2%	9%
2	3%	3%	1%	0%	5% <sup>d</sup>	0%	0%
1 (Not at all likely)	0%	5% <sup>d</sup>	0%	0%	2%	0%	0%

2017 target n= 383 (a); 2017 day trip n=107 (b); 2017 no paid lodging n=82 (c); 2018 target n=397 (d); 2018 day trip n=59 (e); 2018 no paid lodging n=41 (f); 30+ night stay n=93 (g)  
a / b / c / d / e / f / g 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			Non-target 30+ night stay (g)
	Target travelers (a)	Non-target Day trip (b)	Non-target No paid lodging (c)	Target travelers (d)	Non-target Day trip (e)	Non-target No paid lodging (f)	
Likely to return (top 2 box)	82%	66%	80%	80%	76%	83%	84%
5 (Already planning a trip)	41% <sup>be</sup>	21%	37%	37% <sup>b</sup>	19%	32%	30%
4 (Very likely)	42%	46%	44%	43%	58%	51%	54%
3 (Somewhat likely)	11%	19%	15%	13%	15%	17%	13%
2 (Not very likely)	4%	9%	4%	6%	7%	0%	3%
1 (Not at all likely)	3%	6% <sup>d</sup>	1%	1%	2%	0%	0%

During which season(s) would you be most likely to visit (of those likely to visit)	2017			2018			Non-target 30+ night stay (g)
	Target travelers (a)	Non-target Day trip (b)	Non-target No paid lodging (c)	Target travelers (d)	Non-target Day trip (e)	Non-target No paid lodging (f)	
Spring	33%	38%	41%	33%	43%	44%	28%
Summer	51%	52%	51%	43%	54%	46%	61%
Fall	59% <sup>g</sup>	42%	53% <sup>g</sup>	61% <sup>bg</sup>	44%	66% <sup>g</sup>	23%
Winter	15%	19%	22%	10%	20%	24%	21%

2017 target n= 383 (a); 2017 day trip n=107 (b); 2017 no paid lodging n=82 (c); 2018 target n=397 (d); 2018 day trip n=59 (e); 2018 no paid lodging n=41 (f); 30+ night stay n=93 (g)

a / b / c / d / e / f / g 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			Non-target 30+ night stay (g)
	Target travelers (a)	Non-target Day trip (b)	Non-target No paid lodging (c)	Target travelers (d)	Non-target Day trip (e)	Non-target No paid lodging (f)	
Alabama	21%	18%	22%	21%	32% <sup>a</sup>	20%	9%
Louisiana	9%	6%	6%	9%	7%	0%	2%
Georgia	8%	4%	7%	7%	5%	2%	2%
Texas	11%	13%	13%	9%	15%	22%	26% <sup>a</sup>
Arkansas	3%	1%	2%	4%	0%	0%	1%
Tennessee	11%	8%	6%	9%	5%	2%	2%
Florida	11%	25% <sup>a</sup>	20%	10%	22%	22%	28% <sup>ad</sup>
Mississippi	6%	3%	4%	7%	10%	15%	3%
Indiana	5%	6%	1%	2%	0%	2%	2%
Oklahoma	1%	1%	1%	2%	0%	2%	2%
Kentucky	1%	2%	0%	5% <sup>a</sup>	0%	0%	1%
Missouri	4%	1%	0%	2%	0%	0%	1%
Wisconsin	0%	3% <sup>a</sup>	1%	1%	0%	0%	2%
Illinois	2%	3%	5%	2%	0%	2%	3%
Michigan	2%	2%	4%	2%	0%	0%	4%
Ohio	1%	3%	1%	2%	0%	5%	1%

2017 target n= 383 (a); 2017 day trip n=107 (b); 2017 no paid lodging n=82 (c); 2018 target n=397 (d); 2018 day trip n=59 (e); 2018 no paid lodging n=41 (f); 30+ night stay n=93 (g)  
a / b / c / d / e / f / g indicate statistically significant differences at the 95% level.

# Comparing Non-Target Trips Year-Over-Year

General activities (non-target trips)	2017			2018			Non-target 30+ night stay (g)
	Target travelers (a)	Non-target Day trip (b)	Non-target No paid lodging (c)	Target travelers (d)	Non-target Day trip (e)	Non-target No paid lodging (f)	
Beaches	64% <sup>bce</sup>	33%	45%	74% <sup>abcdefg</sup>	42%	46%	55% <sup>b</sup>
Dining out	59% <sup>bc</sup>	34%	40%	66% <sup>bcefg</sup>	44%	63% <sup>b</sup>	43%
Swimming	48% <sup>bce</sup>	25%	33%	45% <sup>be</sup>	15%	27%	32%
Relaxing	56% <sup>b</sup>	35%	43%	64% <sup>bcefg</sup>	37%	61%	46%
Shopping	49% <sup>be</sup>	26%	34%	57% <sup>bcefg</sup>	20%	37%	38%
Sightseeing	29%	23%	22%	34%	20%	22%	31%
Shelling	16%	9%	5%	15%	10%	5%	17%
Exercise/working out	14%	7%	5%	10%	10%	7%	19%
Fishing	18% <sup>b</sup>	7%	9%	15%	5%	2%	13%
Bars/nightlife	18%	14%	23%	18%	8%	21%	0%
Photography	11%	9%	7%	15%	10%	7%	14%
Boating or sailing	8%	4%	10%	9%	7%	10%	16% <sup>b</sup>
Watching wildlife	13%	12%	11%	16%	8%	15%	18%
Visiting friends/relatives who live in the area	8%	12%	24% <sup>ad</sup>	10%	12%	24% <sup>a</sup>	23% <sup>ad</sup>
Family/friends reunion	13%	8%	13%	10%	14%	12%	18%
Dolphin tour	10%	7%	2%	10%	3%	12%	9%
Bicycle riding	5%	7%	9%	7%	2%	2%	20% <sup>abcdef</sup>
Parasailing/jet skiing	6%	4%	5%	4%	3%	5%	10%
Historical sites	12%	8%	6%	12%	5%	2%	16%
Visiting a spa	9%	6%	6%	6%	3%	7%	17% <sup>bde</sup>
Scuba diving/snorkeling	3%	3%	1%	6%	2%	5%	12% <sup>ac</sup>
Sporting events	4%	3%	5%	6%	0%	0%	6%
Golfing	8%	5%	10%	6%	3%	2%	10%
Kayaking/canoeing/paddle boarding	10%	5%	2%	6%	5%	0%	11%
Tennis	6% <sup>d</sup>	1%	1%	2%	0%	0%	8%
Hiking on trails	9%	7%	9%	9%	8%	10%	16%
Birdwatching	6%	2%	10%	8%	7%	10%	14%
Concerts and nightlife	13%	7%	12%	10%	5%	5%	11%
Festivals or special events (non-sports events)	7%	4%	12%	9%	3%	7%	10%

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= 383 (a);  
 2017 day trip n=107 (b);  
 2017 no paid lodging n=82 (c); 2018 target n=397 (d); 2018 day trip n=59 (e); 2018 no paid lodging n=41 (f); 30+ night stay n=93 (g)  
 a / b / c / d / e / f / g indicate statistically significant differences at the 95% level.

# Comparing Non-Target Trips Year-Over-Year

Specific attractions (non-target trips)	2017			2018			Non-target 30+ night stay (g)
	Target travelers (a)	Non-target Day trip (b)	Non-target No paid lodging (c)	Target travelers (d)	Non-target Day trip (e)	Non-target No paid lodging (f)	
Adventure Island	8%	5%	2%	9%	3%	0%	11%
Alabama Gulf Coast Zoo	10%	6%	2%	9%	2%	0%	13%
Alabama's Coastal Connection Scenic Byway	9%	2%	7%	10%	0%	5%	6%
Battleship USS Alabama	7%	4%	4%	8%	0%	5%	11%
Bellingrath Gardens	5%	1%	1%	3%	2%	0%	5%
Bon Secour National Wildlife Refuge	6%	1%	1%	5%	0%	0%	5%
Dauphin Island	13%	6%	5%	11%	7%	2%	9%
Fort Morgan Historic Site	10%	4%	7%	7%	5%	2%	5%
Gulf State Park	16% <sup>b</sup>	4%	5%	17% <sup>b</sup>	5%	15%	13%
Hugh S. Branyon Backcountry Trail	6%	1%	0%	3%	0%	0%	4%
National Naval Aviation Museum	4%	3%	1%	6%	2%	0%	9%
OWA Park	2%	5%	1%	4%	3%	0%	3%
Tanger Outlets	26% <sup>b</sup>	10%	15%	30% <sup>bg</sup>	15%	17%	15%
The Track	10% <sup>b</sup>	0%	5%	8%	2%	0%	6%
The Wharf	14%	9%	10%	17%	5%	17%	15%
Waterville	3%	3%	4%	3%	2%	0%	5%

2017 target n= 383 (a); 2017 day trip n=107 (b); 2017 no paid lodging n=82 (c); 2018 target n=397 (d); 2018 day trip n=59 (e); 2018 no paid lodging n=41 (f); 30+ night stay n=93 (g)  
a / b / c / d / e / f / g 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.