Visitor Profile Research

Summer 2018

Strategic Marketing & Research Insights LLC

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Introduction

Visitor Profile Research – Summer 2018

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 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.

- This report is the second of four seasonal reports, leading up to a final report and insights.

Research Objectives

Gather information on summer 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

- This report presents information collected through online surveys of visitors to Gulf Shores, Orange Beach, or Fort Morgan during summer 2017 and summer 2018 (June through August).

- 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. Because we asked travelers about multiple trips, as quarterly data collection progresses we will continue to gather data from travelers who visited in summer 2018, so this volume will grow.

Number of trips represented in the data	Summer 2017	Summer 2018
Target trips (stayed 1-30 nights in paid accommodations)	891	407
Non-target trips (visited but did not stay overnight, did not use paid accommodations, or stayed more than 30 nights)	392	192

- 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 summer 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.
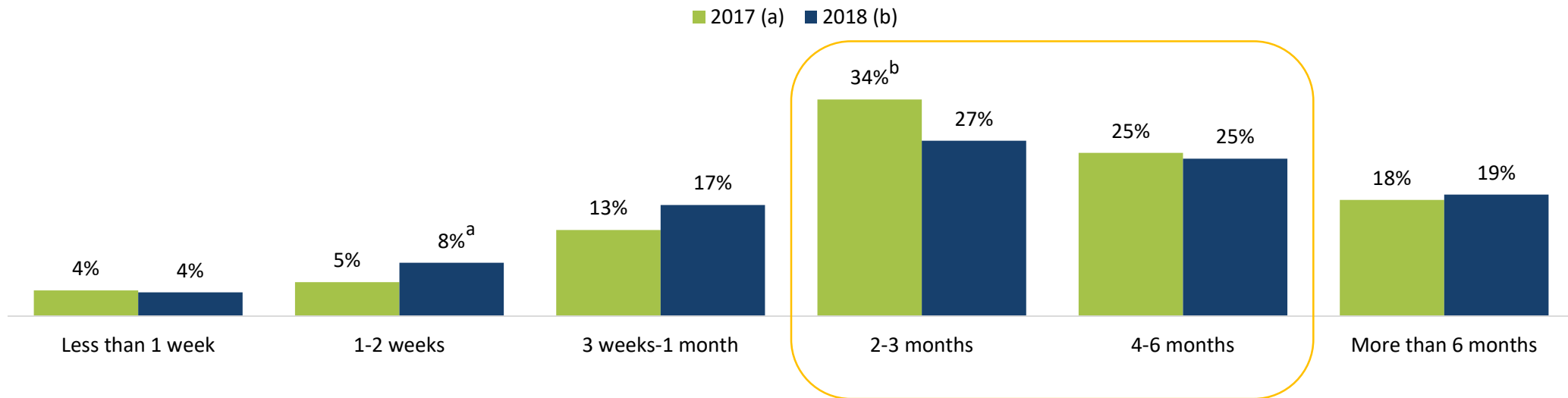
Detailed Findings

Visitor Profile Research – Summer 2018

Travel Planning

- About half of trips are planned 2 to 6 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 trip to Gulf Shores/Orange Beach?

■ 2017 (a)   ■ 2018 (b)

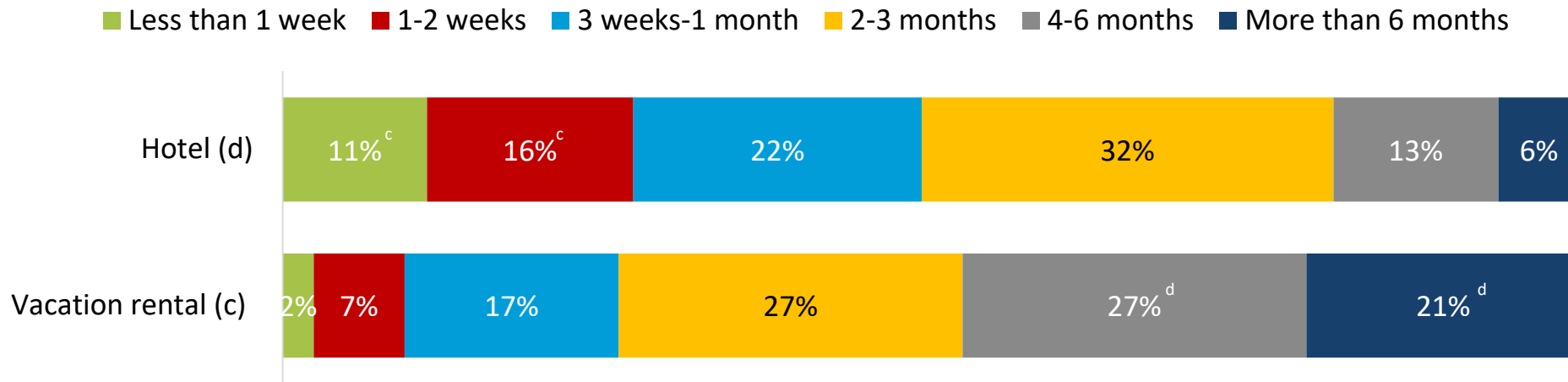|	Less than 1 week	1-2 weeks	3 weeks-1 month	2-3 months	4-6 months	More than 6 months
2017 (a)	4%	5%	13%	34%[b]	25%	18%
2018 (b)	4%	8%[a]	17%	27%	25%	19%

2017 n= 891 (a); 2018 n=407 (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

- Those who stay in hotels are more likely to plan and book in the short term. More than a quarter of summer hotel trips are planned in two weeks or less.

Summer Trip Planning Horizon by Lodging Type (2018 data)

Legend: ■ Less than 1 week ■ 1-2 weeks ■ 3 weeks-1 month ■ 2-3 months ■ 4-6 months ■ More than 6 months

Lodging Type	Less than 1 week	1-2 weeks	3 weeks-1 month	2-3 months	4-6 months	More than 6 months
Hotel (d)	11%[c]	16%[c]	22%	32%	13%	6%
Vacation rental (c)	2%	7%	17%	27%	27%[d]	21%[d]

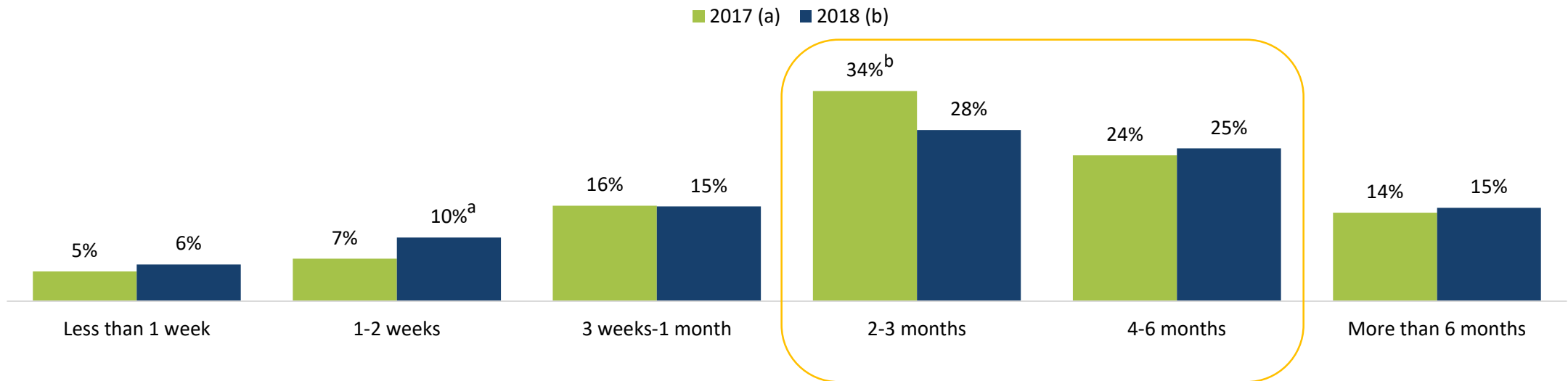Vacation rental/condo n= 369 (c); Hotel/motel n=63 (d); c / d indicate statistically significant differences at the 95% level.
Due to the small sample size of 2018 hotel/motel stayers as of the date of this reporting, these figures are presented as directional indicators.

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, more than half of lodging bookings take place 2 to 6 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 (a) ■ 2018 (b)

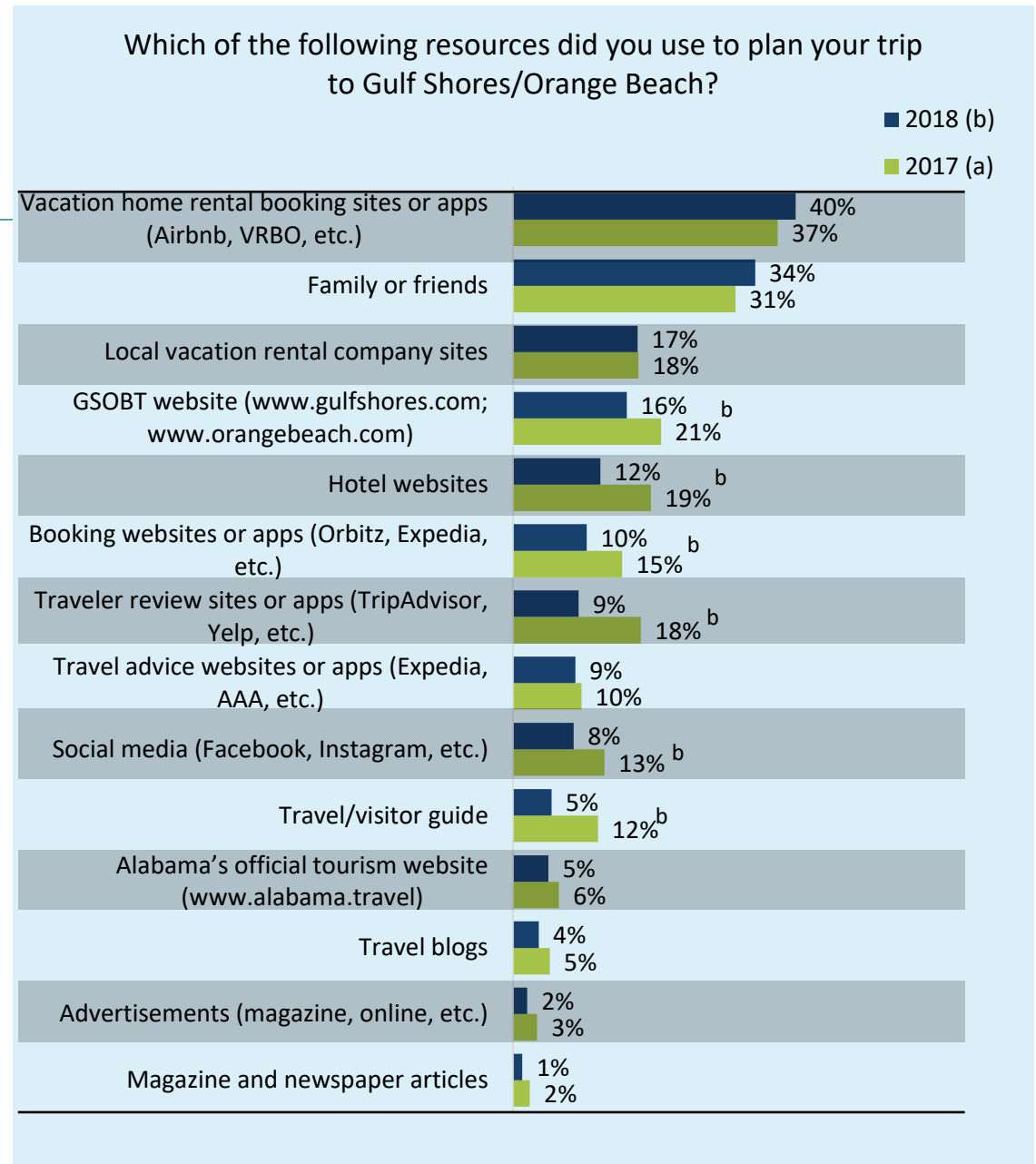|	Less than 1 week	1-2 weeks	3 weeks-1 month	2-3 months	4-6 months	More than 6 months
2017 (a)	5%	7%	16%	34%[b]	24%	14%
2018 (b)	6%	10%[a]	15%	28%	25%	15%

2017 n= 891 (a); 2018 n=407 (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 summer visit planning resources remain homesharing sites and family and friends.

- Travel planning takes place largely online, and even family and friends have an online presence through social media.

- Recent trips made less use than 2017 trips of GSOBT's and hotel websites, as well as peer-to-peer sites like travel review and social media.

Which of the following resources did you use to plan your trip to Gulf Shores/Orange Beach?

■ 2018 (b)
■ 2017 (a)

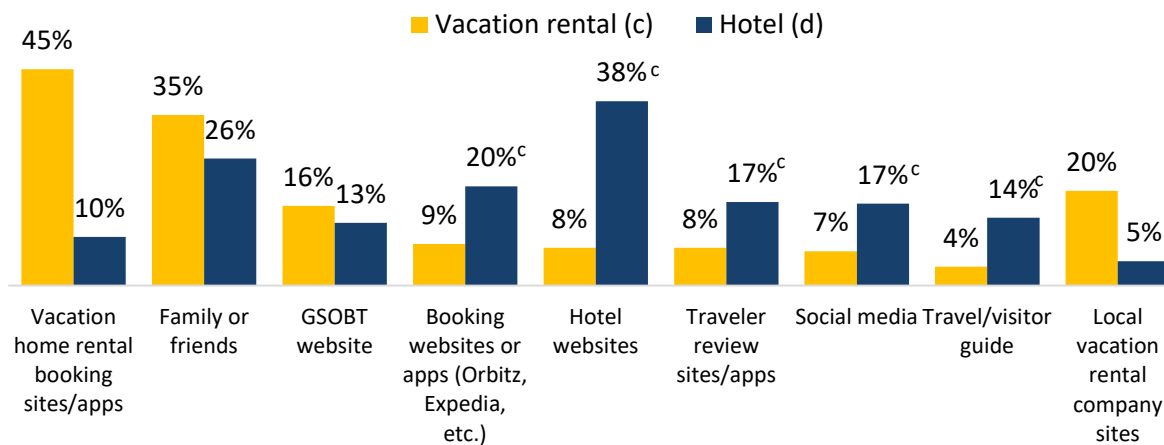| Resource	2018 (b)	2017 (a)
Vacation home rental booking sites or apps (Airbnb, VRBO, etc.)	40%	37%
Family or friends	34%	31%
Local vacation rental company sites	17%	18%
GSOBT website (www.gulfshores.com; www.orangebeach.com)	16% b	21%
Hotel websites	12% b	19%
Booking websites or apps (Orbitz, Expedia, etc.)	10% b	15% b
Traveler review sites or apps (TripAdvisor, Yelp, etc.)	9%	18% b
Travel advice websites or apps (Expedia, AAA, etc.)	9%	10%
Social media (Facebook, Instagram, etc.)	8%	13% b
Travel/visitor guide	5%	12% b
Alabama's official tourism website (www.alabama.travel)	5%	6%
Travel blogs	4%	5%
Advertisements (magazine, online, etc.)	2%	3%
Magazine and newspaper articles	1%	2%

2017 n= 891 (a); 2018 n=407 (b); a / b indicate statistically significant differences at the 95% level.
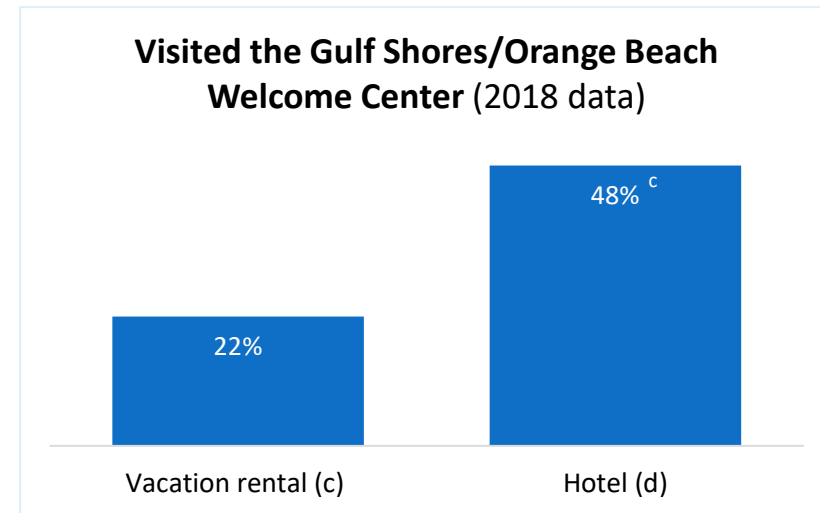
Travel Planning – Hotel vs. Condo Rental

- 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 rely more on social media and traveler review sites and travel guides. These are behaviors consistent with new visitors who are less familiar with the destination. 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)

■ Vacation rental (c) ■ Hotel (d)

Resource	Vacation rental (c)	Hotel (d)
Vacation home rental booking sites/apps	45%	10%
Family or friends	35%	26%
GSOBT website	16%	13%
Booking websites or apps (Orbitz, Expedia, etc.)	9%	20%c
Hotel websites	8%	38%c
Traveler review sites/apps	8%	17%c
Social media	7%	17%c
Travel/visitor guide	4%	14%c
Local vacation rental company sites	20%	5%

Visited the Gulf Shores/Orange Beach Welcome Center (2018 data)

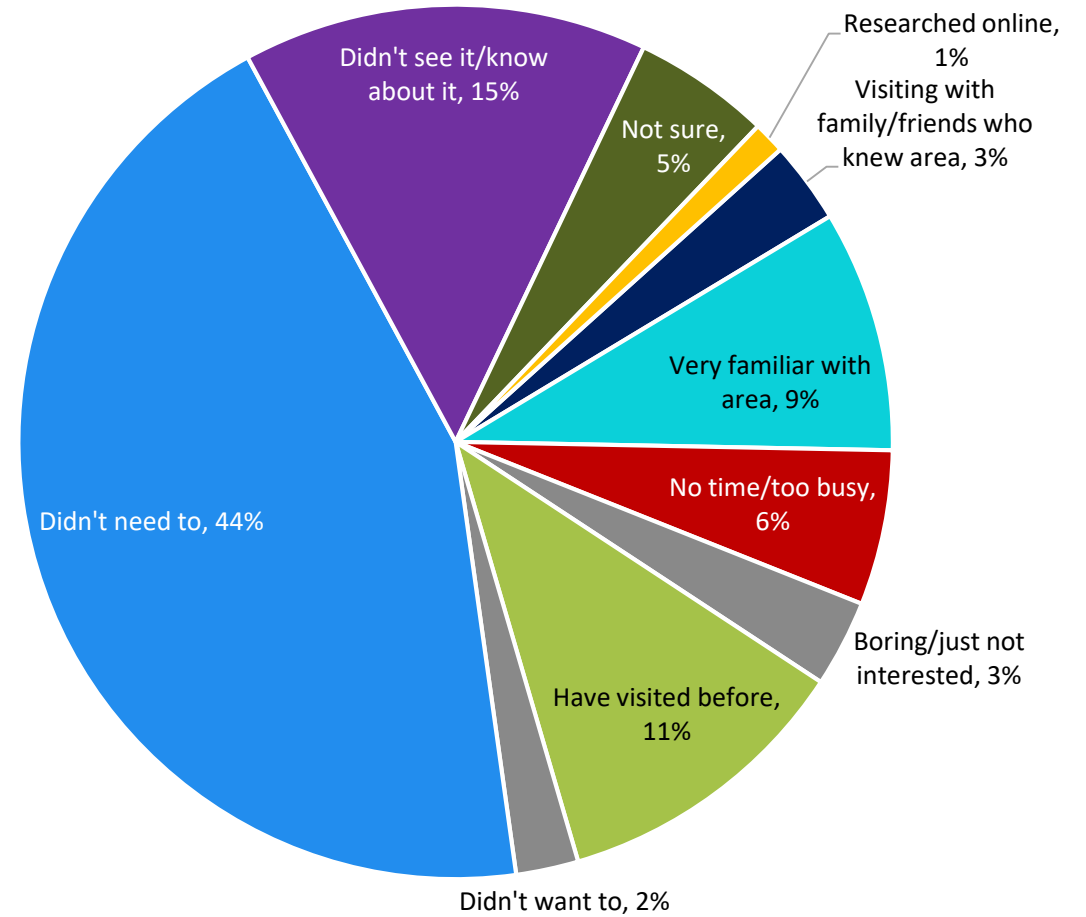|	Vacation rental (c)	Hotel (d)
	22%	48%c

Vacation rental/condo n= 369 (c); Hotel/motel n=63 (d); c / d indicate statistically significant differences at the 95% level. Due to the small sample size of 2018 hotel/motel stayers as of the date of this reporting, these figures are presented as directional indicators.

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

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.

Travel Planning

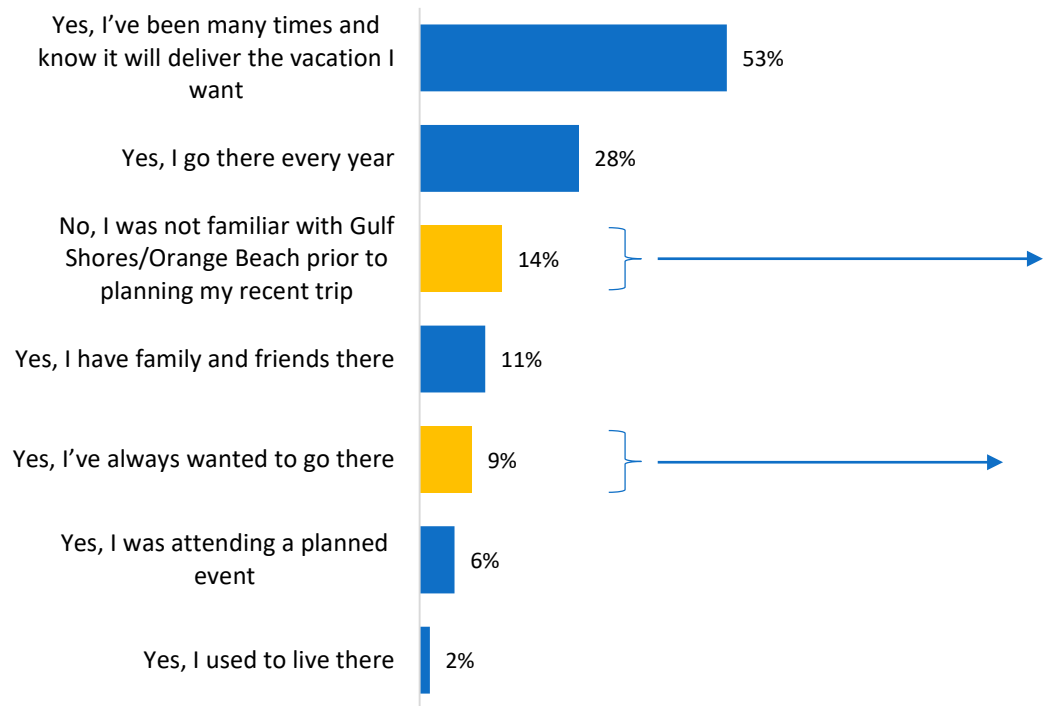- Of those who did not visit a welcome center, the most common reason is already being familiar with the destination.

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

Pie chart:
- Didn't need to, 44%
- Didn't see it/know about it, 15%
- Not sure, 5%
- Researched online, 1%
- Visiting with family/friends who knew area, 3%
- Very familiar with area, 9%
- No time/too busy, 6%
- Boring/just not interested, 3%
- Have visited before, 11%
- Didn't want to, 2%

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

Trip Characteristics

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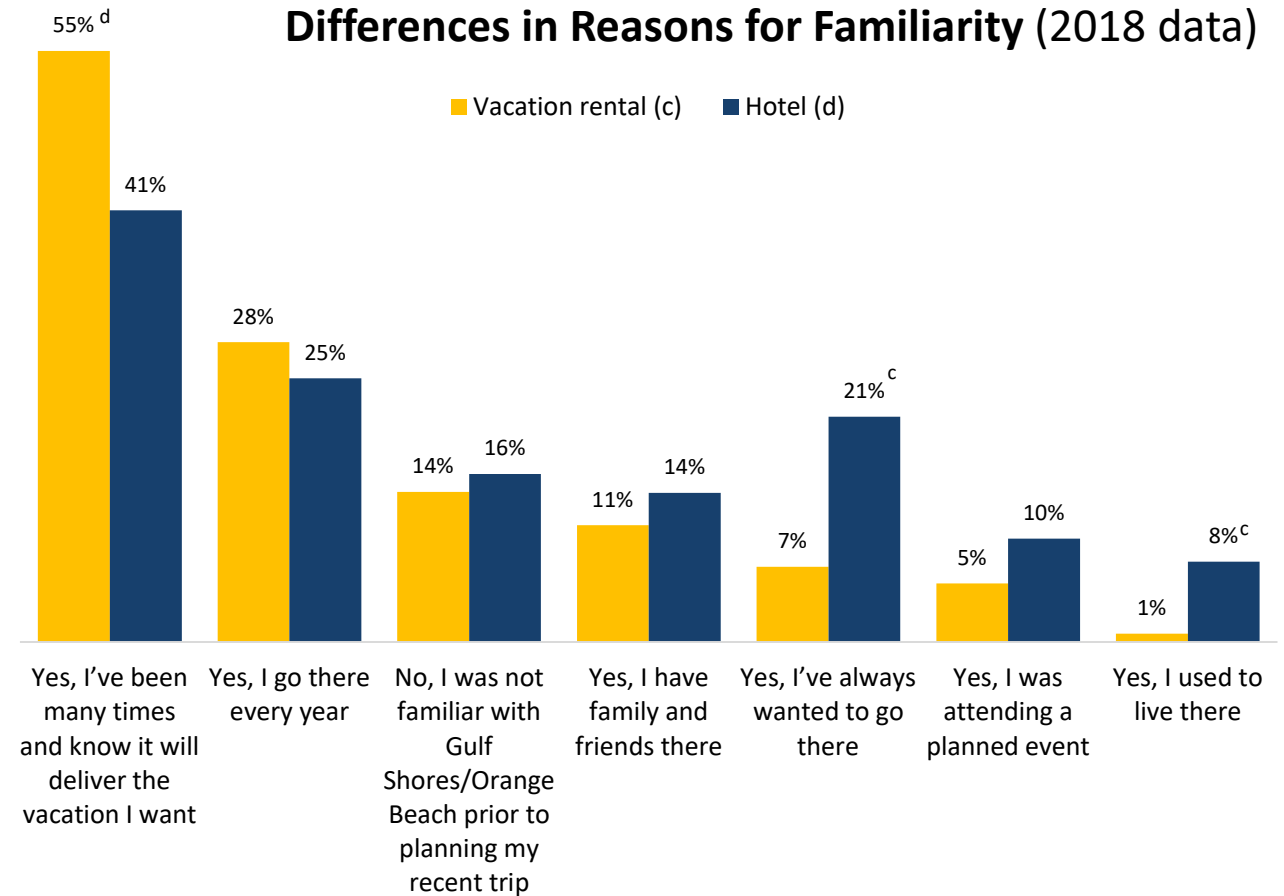Orange Beach familiar to you?**
(2018 data)

Response	%
Yes, I've been many times and know it will deliver the vacation I want	53%
Yes, I go there every year	28%
No, I was not familiar with Gulf Shores/Orange Beach prior to planning my recent trip	14%
Yes, I have family and friends there	11%
Yes, I've always wanted to go there	9%
Yes, I was attending a planned event	6%
Yes, I used to live there	2%

- The lion's share of GS/OB trips are repeat visits from those who are familiar with the destination.
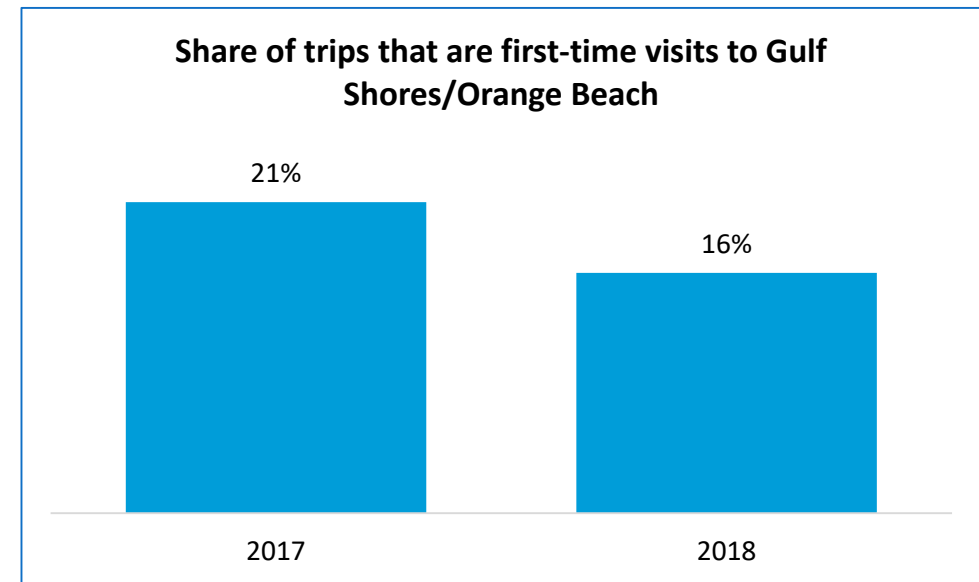
Share of trips that are first-time visits to Gulf Shores/Orange Beach

2017	2018
21%	16%

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) and former residents.

Differences in Reasons for Familiarity (2018 data)

■ Vacation rental (c)　　■ Hotel (d)

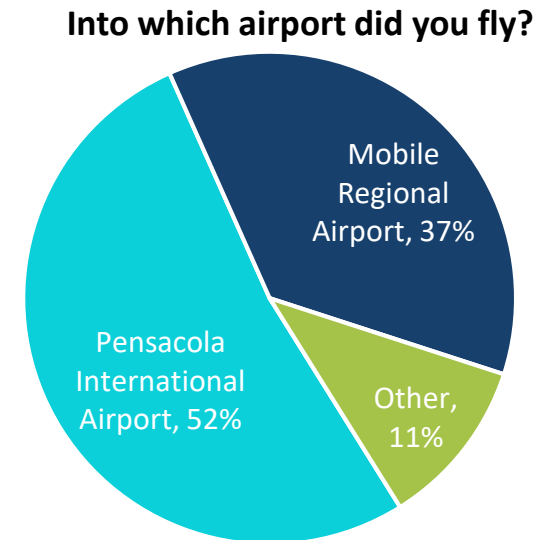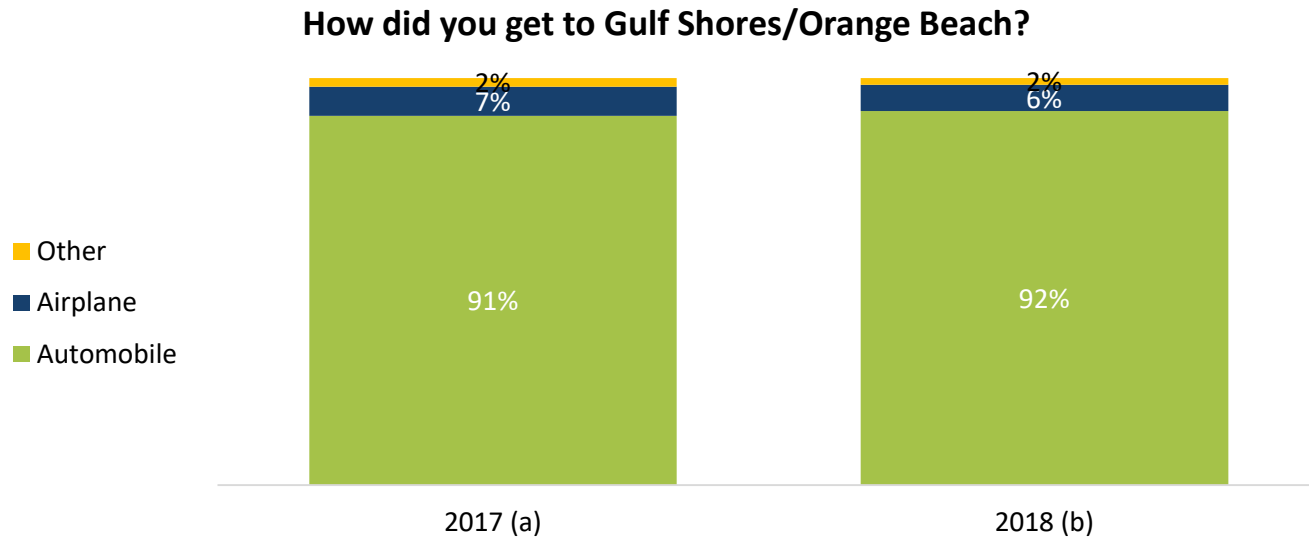|	Yes, I've been many times and know it will deliver the vacation I want	Yes, I go there every year	No, I was not familiar with Gulf Shores/Orange Beach prior to planning my recent trip	Yes, I have family and friends there	Yes, I've always wanted to go there	Yes, I was attending a planned event	Yes, I used to live there
Vacation rental (c)	55% [d]	28%	14%	11%	7%	5%	1%
Hotel (d)	41%	25%	16%	14%	21% [c]	10%	8% [c]

Vacation rental/condo n= 369 (c); Hotel/motel n=63 (d); c / d indicate statistically significant differences at the 95% level. Due to the small sample size of 2018 hotel/motel stayers as of the date of this reporting, these figures are presented as directional indicators.

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 summer visitors drive to GS/OB. The source markets of those who flew in summer 2018 are Dallas, Miami, Montgomery, Oklahoma City, Indianapolis, Lexington, Houston, and Atlanta.

- Of those who flew, half flew into Pensacola; a third flew into Mobile.

How did you get to Gulf Shores/Orange Beach?

Legend:
- Other
- Airplane
- Automobile

2017 (a): Other 2%, Airplane 7%, Automobile 91%
2018 (b): Other 2%, Airplane 6%, Automobile 92%

Into which airport did you fly?

- Mobile Regional Airport, 37%
- Other, 11%
- Pensacola International Airport, 52%

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

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

Trip Characteristics

- Eight in 10 summer visits included a beach visit, followed by dining, swimming, and relaxing.

- About half of trips included shopping.

Summer trip participation	2017	2018
Beaches	82%	80%
Dining out	64%	62%
Swimming	64%	59%
Relaxing	63%	58%
Shopping	55%	46%
Tanger Outlets	30%	30%
Sightseeing	28%	30%
Shelling	17%	19%
The Wharf	23%	18%
Exercise/Working out	14%	15%
Fishing	13%	14%
Bars/Nightlife	16%	13%
Photography	12%	13%
Adventure Island	11%	12%
Boating or sailing	11%	12%
Watching wildlife	8%	11%
Visiting friends/family in the area	7%	11%
Gulf State Park	11%	11%
Family/friends reunion	7%	10%
Dolphin tour	11%	10%
The Track	10%	9%
Waterville	8%	7%
Bicycle riding	5%	6%
Parasailing/Jet skiing	9%	6%
Dauphin Island	10%	6%
Historical sites	8%	6%

Cont'd.	2017	2018
Battleship USS Alabama	10%	5%
Visiting a spa	5%	5%
Scuba diving/Snorkeling	5%	5%
Sporting events	4%	5%
Alabama's Coastal Connection Scenic Byway	8%	5%
Golfing	6%	5%
Alabama Gulf Coast Zoo	9%	5%
Kayaking/Canoeing/Paddle boarding	7%	5%
Tennis	3%	3%
Hiking on trails	6%	3%
Birdwatching	4%	3%
Fort Morgan Historic Site	9%	3%
OWA Park	1%	2%
Concerts and nightlife	7%	2%
Bellingrath Gardens	2%	2%
Festivals or special events	4%	1%
Bon Secour National Wildlife Refuge	3%	1%
National Naval Aviation Museum	6%	1%
Hugh S. Branyon Backcountry Trail	2%	0%

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

Trip Characteristics

- Looking at beach visits by lodging type shows that vacation renters are more likely to feature beach visits in their trip.

- Directionally, beaches are also the leading motivator of visits from hotel stayers. Their top activities, like vacation renters, are beaches, relaxing, dining out, swimming, shopping, and sightseeing. However, hotel stayers simply do fewer things. This makes sense given the shorter stays, and it could also be related to lower familiarity – knowing less about the options for what there is to do – which reinforces the importance of the welcome centers for these visitors.
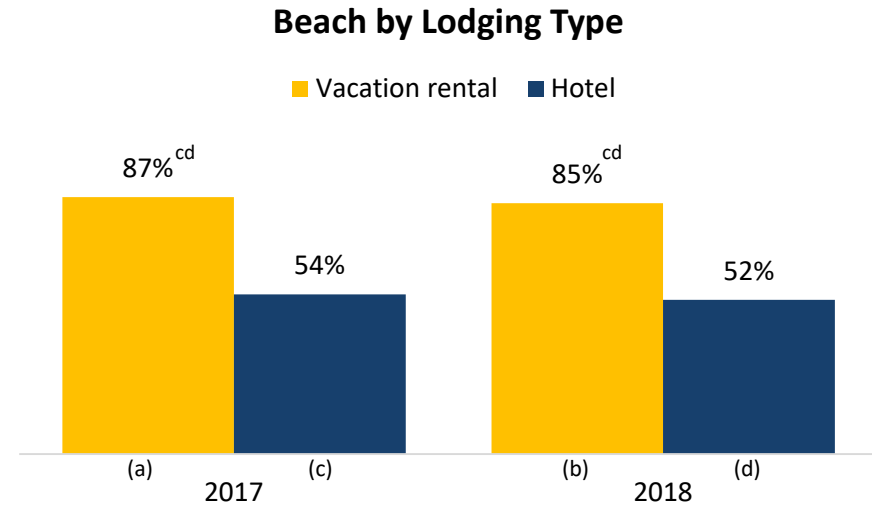
Beach by Lodging Type

■ Vacation rental ■ Hotel

87%cd   54%   85%cd   52%

(a)   (c)   (b)   (d)
2017   2018

Condo/vacation rental 2017 n= 721 (a); 2018 n=369 (b)
Hotel/motel 2017 n= 145 (c); 2018 n=63 (d)
a / b / c / d indicate statistically significant differences at the 95% level.
Due to the small sample size of 2018 hotel/motel stayers as of the date of this reporting, these figures are presented as directional indicators.

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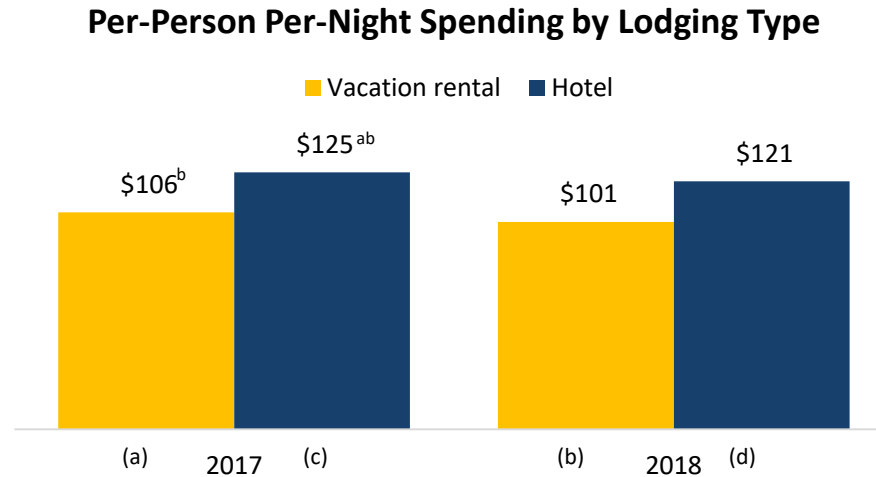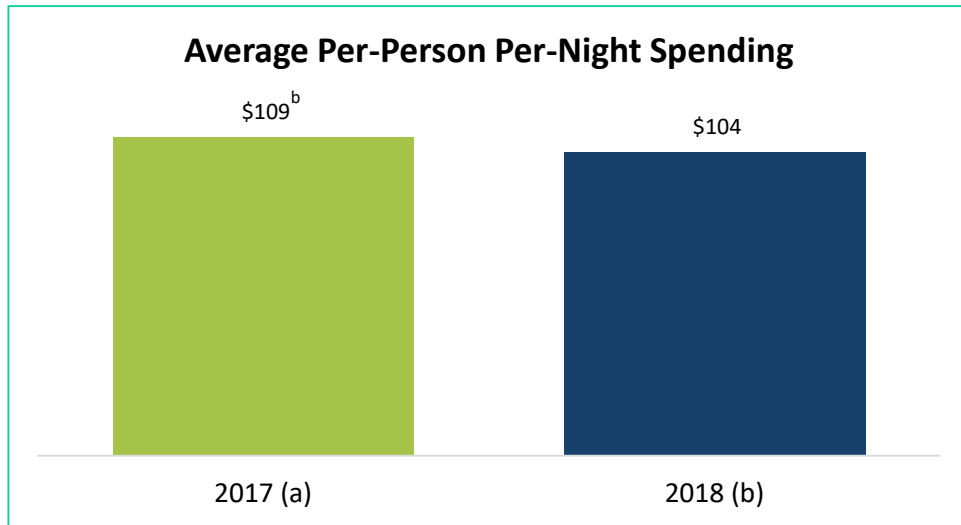
Trip Characteristics

- Roughly three-quarters of GS/OB summer 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.

- Friends and family – whether local residents or visitors meeting up there – are a draw for just under 10% of summer visitors.

Top Summer trip motivators	2017	2018
Beaches	75%	73%
Relaxing	41%	40%
Swimming	28%	28%
Dining out	24%	25%
Shopping	14%	17%
Sightseeing	9%	10%
Tanger Outlets	8%	10%
Family/friends reunion	5%	8%
Visiting friends/relatives who live in the area	6%	7%
Shelling	5%	6%

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

Trip Characteristics

- Hotel spending brings the per-person per-night figure up. The per-person efficiency of vacation rentals is one of the appeals for larger groups.

Average Per-Person Per-Night Spending

$109[b]

$104

2017 (a)

2018 (b)

Per-Person Per-Night Spending by Lodging Type

■ Vacation rental ■ Hotel

$106[b]

$125 [ab]

$101

$121

(a) 2017 (c)

(b) 2018 (d)

Condo/vacation rental 2017 n= 721 (a); 2018 n=369 (b)
Hotel/motel 2017 n= 145 (c); 2018 n=63 (d)
a / b / c / d indicate statistically significant differences at the 95% level.
Due to the small sample size of 2018 hotel/motel stayers as of the date of
this reporting, these figures are presented as directional indicators.

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

- Lodging is down in 2018 from the prior summer.

Average Travel Party Expenditures per Trip – SUMMER	2017 (a)		2018 (b)	
	Spending	% of total	Spending	% of total
Lodging	$1,606	59%	$1,408	59%
Meals/food/groceries	$471[b]	17%	$410	17%
Shopping	$294[b]	11%	$266	11%
Recreation or entertainment	$242	9%	$173	7%
Transportation within Gulf Shores	$64	2%	$64	3%
Other	$65	2%	$54	2%
TOTAL	**$2,741**		**$2,375**	

Average Travel Party Expenditures per Trip – SUMMER	2017		2018	
	Vacation rental (a)	Hotel (b)	Vacation rental (c)	Hotel (d)
Lodging	$1,809	$499	$1,548	$503
Meals/food/groceries	$508	$267	$434	$260
Shopping	$308[c]	$219	$268	$254
Recreation or entertainment	$255[c]	$173	$172	$178
Transportation within Gulf Shores	$59[c]	$90[ac]	$61	$81
Other	$48[d]	$157[d]	$57[ad]	$40
TOTAL	**$2,986**	**$1,405**	**$2,540**	**$1,315**

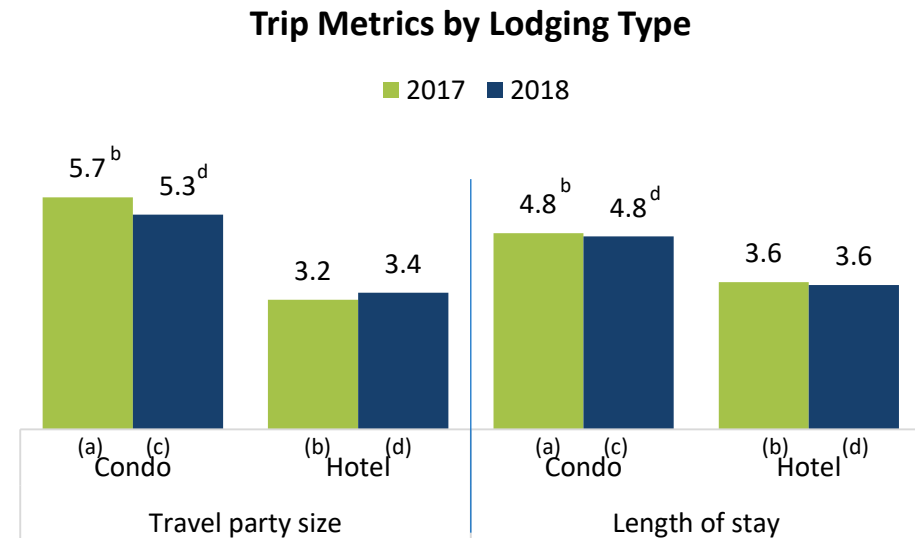2017 n= 585 (a); 2018 n=377 (b); a / b indicate statistically significant differences at the 95% level.

Condo/vacation rental 2017 n= 721 (a); 2018 n=369 (b)
Hotel/motel 2017 n= 145 (c); 2018 n=63 (d)
a / b / c / d indicate statistically significant differences at the 95% level. Due to the small sample size of 2018 hotel/motel stayers as of the date of this reporting, these figures are presented as directional indicators.

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.

Chart legend: ■ Travel party size ■ Length of stay

2017: Travel party size 5.3, Length of stay 4.6
2018: Travel party size 5.0, Length of stay 4.6

Trip Metrics by Lodging Type

Legend: ■ 2017 ■ 2018

Travel party size:
- Condo: 5.7 [b] (a), 5.3 [d] (c)
- Hotel: 3.2 (b), 3.4 (d)

Length of stay:
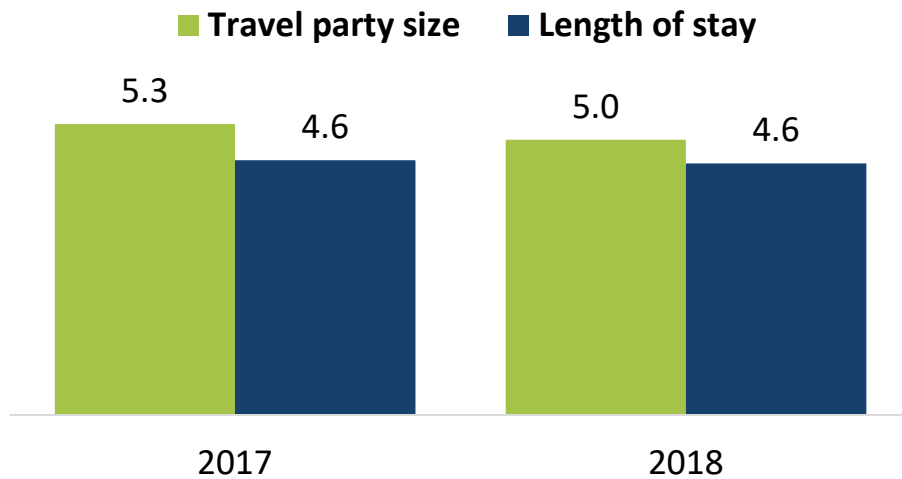- Condo: 4.8 [b] (a), 4.8 [d] (c)
- Hotel: 3.6 (b), 3.6 (d)

Condo/vacation rental 2017 n= 721 (a); 2018 n=369 (b)
Hotel/motel 2017 n= 145 (c); 2018 n=63 (d)
a / b / c / d indicate statistically significant differences at the 95% level. Due to the small sample size of 2018 hotel/motel stayers as of the date of this reporting, these figures are presented as directional indicators.

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

- Year over year, visitors included more younger children (under 6) and fewer teens.

Ages of Children (of travel parties with kids)
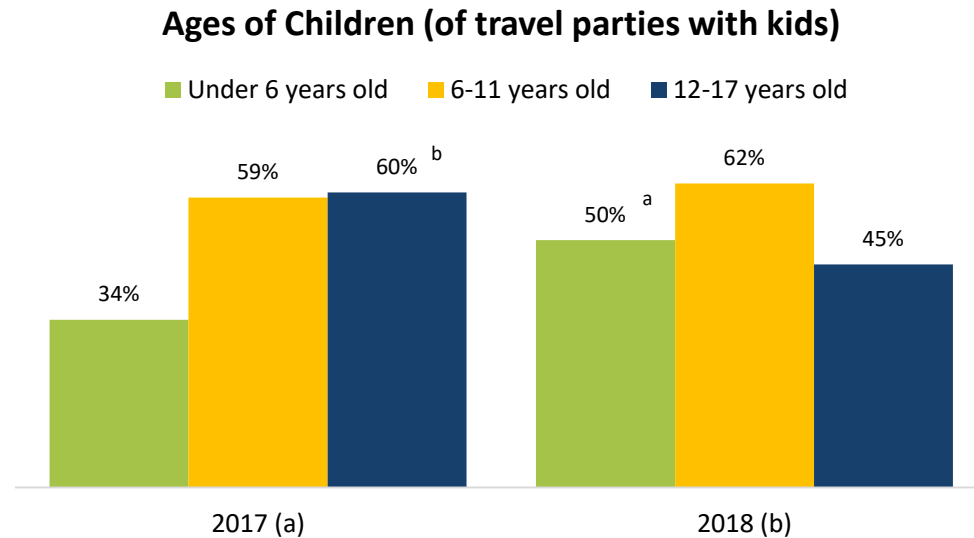
2017 n= 54 (a); 2018 n=61 (b); a / b indicate statistically significant differences at the 95% level.
Due to small sample sizes, these figures are presented as directional indicators.

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

Travel Party Characteristics

- Overall, in terms of demographics, visitors look similar year-over-year:
  - ➤ The majority of travel decision makers are female
  - ➤ Two thirds are married
  - ➤ Average household income is over $100K

Year-over-Year Demographic Profile Summer visitors		2017 (a)	2018 (b)
Gender	Male	35%	37%
	Female	65%	63%
Age	Average	42	45
Marital status	Married	67%	67%
	Divorced/Separated	11%	10%
	Single/Never married	19%	18%
	Widowed	3%	5%
HH income	Average	$106,086	$110,576

2017 n= 859 (a); 2018 n=426 (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

- As we saw in spring, hotel visitors tend to be younger, more male, are more likely to be single, and more ethnically diverse.

- Visitors who stay in vacation rentals have higher household incomes.

Summer demographic profile by lodging type		2017		2018	
		Vacation rental/condo	Hotel	Vacation rental/condo	Hotel
Gender	Male	21%	40%	27%	43%
	Female	79%	60%	73%	57%
Age	Average	45	41	47	45
Marital status	Married	72%	65%	74%	63%
	Divorced/Separated	12%	10%	8%	11%
	Single/Never married	13%	22%	12%	21%
	Widowed	3%	3%	5%	5%
HH income	Average	$124,276	$99,267	$129,215	$100,198
Education	College grad+	64%	58%	70%	57%
Occupation	Executive/upper management	14%	18%	10%	19%
	IT professional	5%	10%	2%	8%
	Educator	14%	9%	13%	8%
	Homemaker	12%	13%	12%	11%
	Student	2%	1%	1%	2%
	Small business owner	4%	8%	6%	6%
	Skilled trade/service	6%	9%	9%	9%
	Other	23%	17%	21%	17%
	Retired	17%	10%	21%	14%
	Not currently employed	2%	6%	4%	6%
Ethnicity	Caucasian/White	88%	75%	88%	78%
	African-American/Black	6%	14%	5%	14%
	Latino/Hispanic	2%	6%	2%	6%
	Asian	2%	6%	2%	2%
	American Indian	1%	1%	1%	2%
	Other	2%	1%	2%	2%

Travel Party Characteristics

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

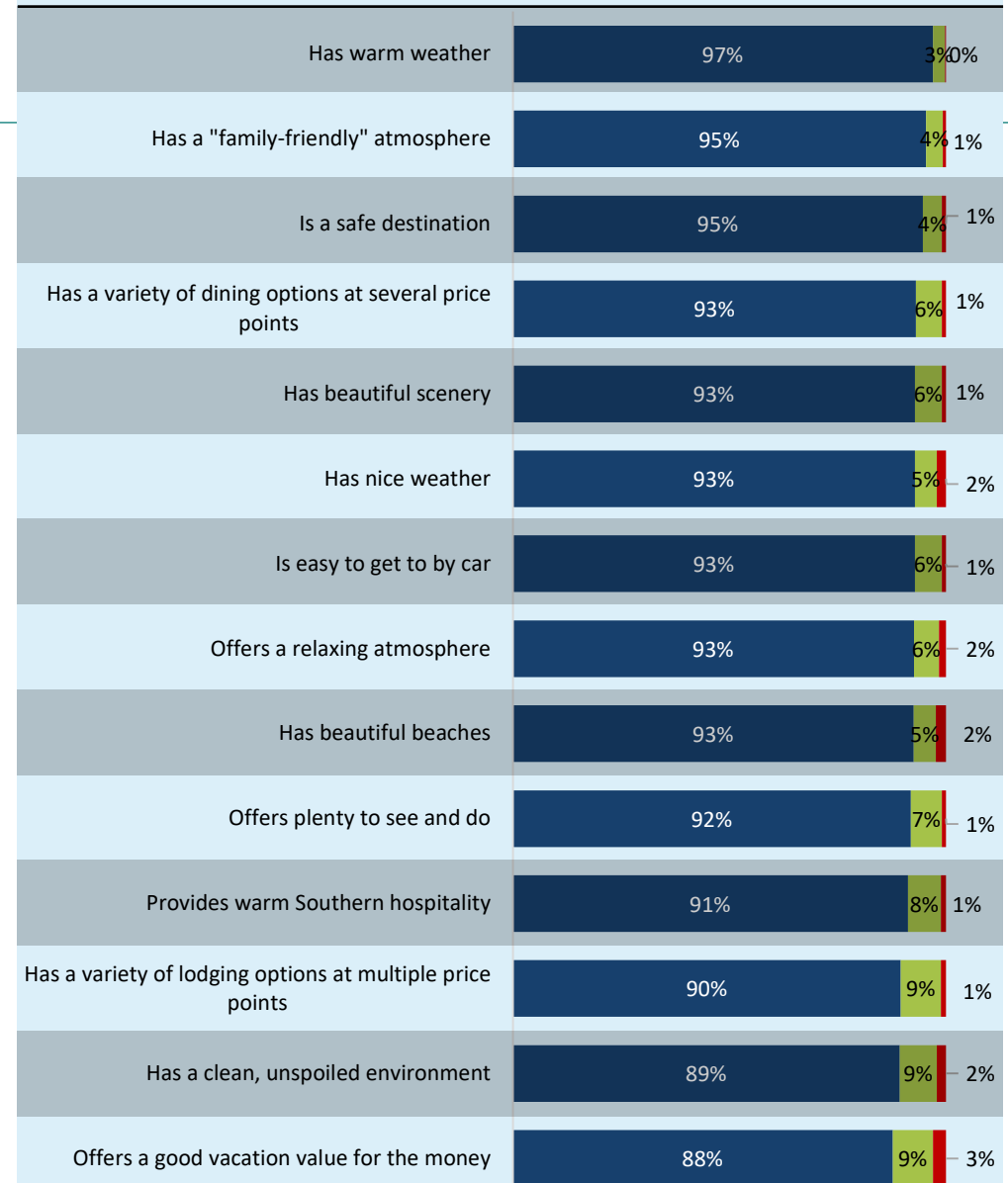|	2017	2018
Alabama	17%	21%
Louisiana	17%	20%
Georgia	9%	10%
Texas	12%	9%
Arkansas	6%	8%
Tennessee	6%	8%
Florida	7%	7%
Mississippi	6%	7%
Indiana	4%	4%
Oklahoma	2%	3%
Kentucky	2%	2%
Missouri	4%	1%
Wisconsin	1%	1%
Illinois	2%	0%
Michigan	1%	0%
Ohio	3%	0%

Views Toward GS/OB & Trip Satisfaction

- Ratings of GS/OB by summer visitors are very positive.

- There is year-over-year improvement of the already high ratings of the area for its clean environment, dining options, and having a lot for visitors to see and do.

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
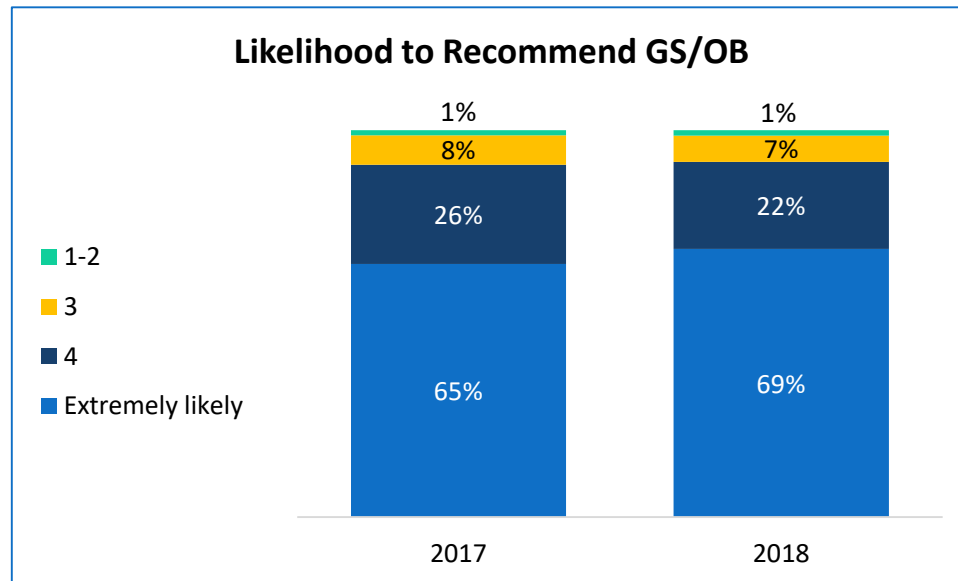
Views Toward Gulf Shores/Orange Beach (2018)

■ Top 2 Box   ■ 3   ■ Bottom 2 Box

Statement	Top 2 Box	3	Bottom 2 Box
Has warm weather	97%	3%	0%
Has a "family-friendly" atmosphere	95%	4%	1%
Is a safe destination	95%	4%	1%
Has a variety of dining options at several price points	93%	6%	1%
Has beautiful scenery	93%	6%	1%
Has nice weather	93%	5%	2%
Is easy to get to by car	93%	6%	1%
Offers a relaxing atmosphere	93%	6%	2%
Has beautiful beaches	93%	5%	2%
Offers plenty to see and do	92%	7%	1%
Provides warm Southern hospitality	91%	8%	1%
Has a variety of lodging options at multiple price points	90%	9%	1%
Has a clean, unspoiled environment	89%	9%	2%
Offers a good vacation value for the money	88%	9%	3%

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.

- Likelihood to recommend is high across lodging types.

Likelihood to Recommend GS/OB

	1%		1%
2017	8%	2018	7%
	26%		22%
	65%		69%

Legend:
- 1-2
- 3
- 4
- Extremely likely

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	2017 Top 2 Box %	2018 Top 2 Box %
Vacation rental/condo	90%	94%
Hotel	91%	90%

Condo/vacation rental 2017 n= 721 (a); 2018 n=369 (b)
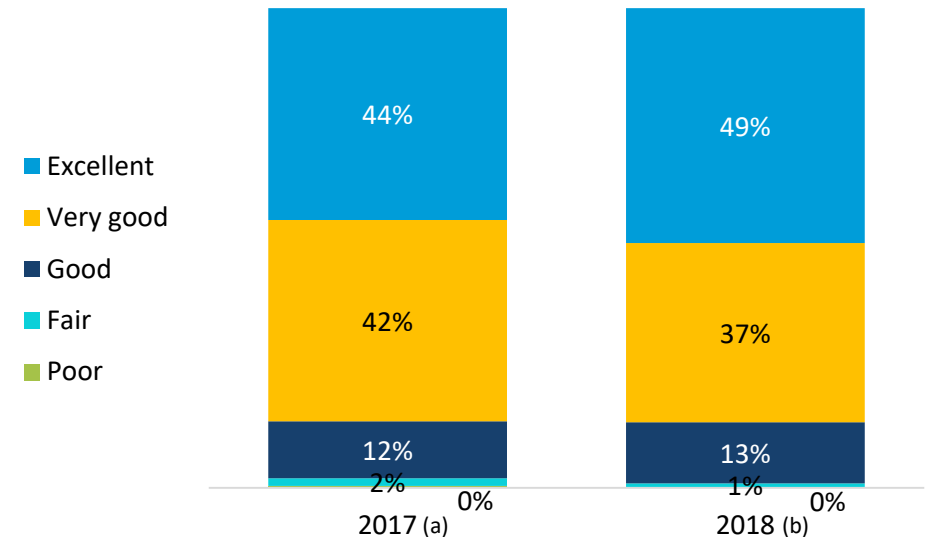Hotel/motel 2017 n= 145 (c); 2018 n=63 (d)
a / b / c / d indicate statistically significant differences at the 95% level. Due to the small sample size of 2018 hotel/motel stayers as of the date of this reporting, these figures are presented as directional indicators.

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

- The destination receives positive ratings for its quality of service. Nearly half give the area an "excellent" rating, and another 4 in 10 say it is "very good."

- Almost no summer visitors rated the area "poor." The few who said "fair" mentioned the weather and some customer service challenges.

- 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?

Legend:
- Excellent
- Very good
- Good
- Fair
- Poor

|	2017 (a)	2018 (b)
Excellent	44%	49%
Very good	42%	37%
Good	12%	13%
Fair	2%	1%
Poor	0%	0%

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.

- Among summer 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

Very likely

Already planning a trip
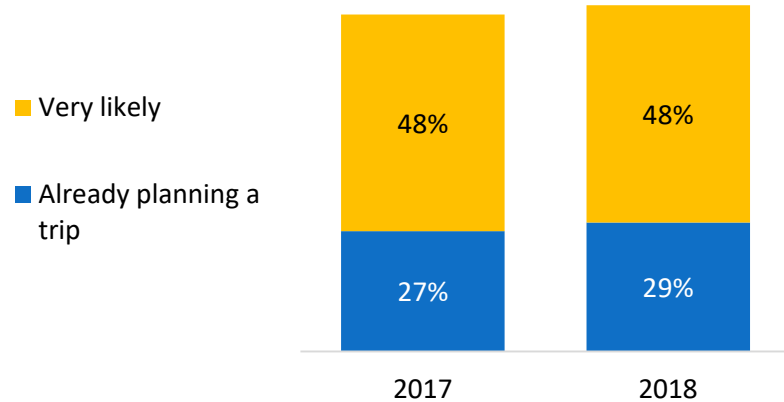
Already planning a trip (2018)	
I've been many times and know it will deliver the vacation I want	52%
I go there every year	38%
I have family and friends there	15%
I was attending a planned event (tournament, meeting, wedding, etc.)	8%

Likelihood to visit GS/OB in the next year
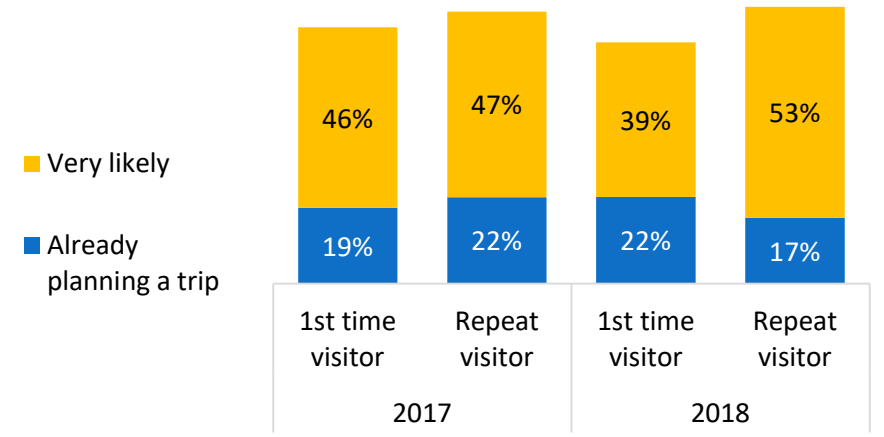
Very likely

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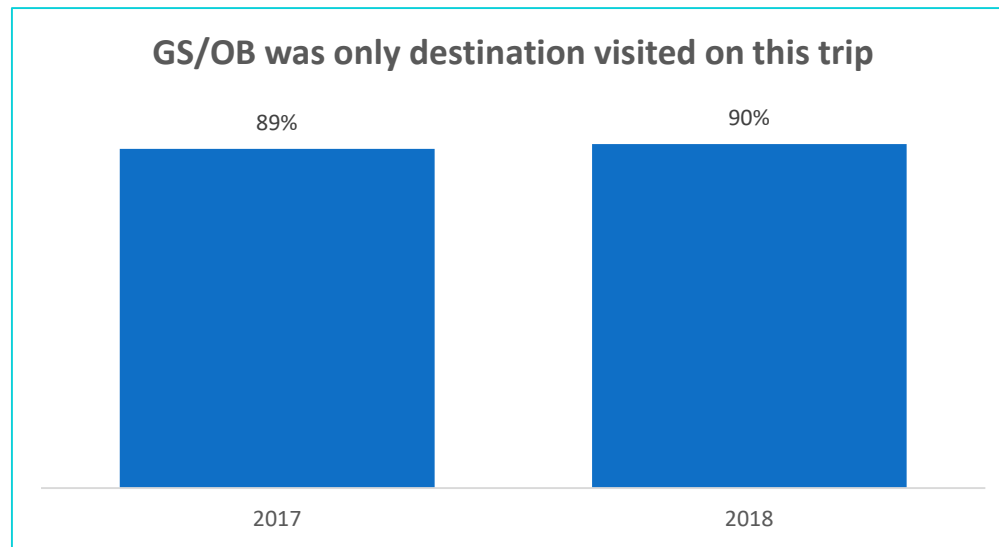
Question text: How likely are you to visit Gulf Shores/Orange Beach in the next year? Response options: Not at all likely, Not very likely, Somewhat likely, Very likely, Already planning a trip

Destinations Visited

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

GS/OB was only destination visited on this trip

89%	90%
2017	2018

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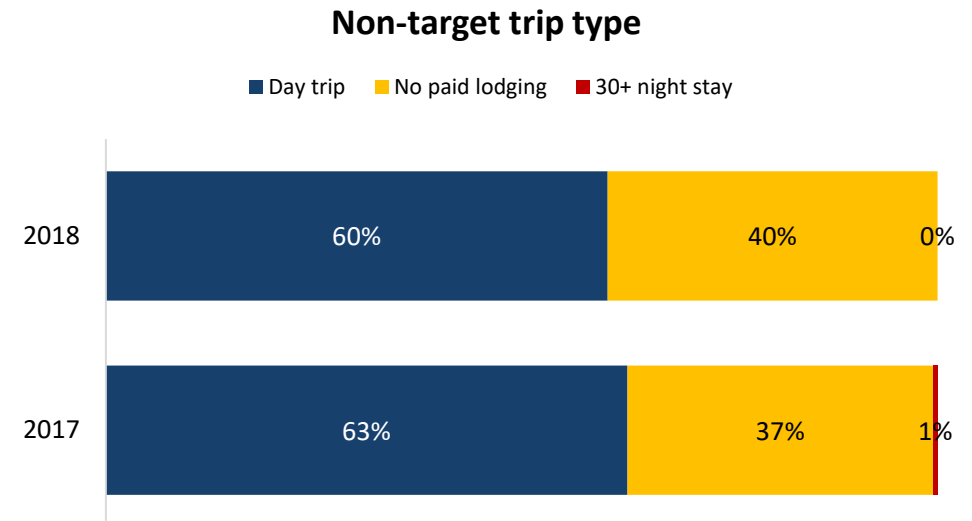
Appendix

Visitor Profile Research – Summer 2018

Comparing Target to Other Travelers

- The majority of non-target trips are day trips.

- The data still does not reflect a significant share of travelers staying 30+ days or more. This is likely a seasonal experience, with snow birds coming in winter.

- However, there is also a possibility that people who come to the area for a month or more at a time 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 subsequent waves of research we will explore this further.

Non-target trip type

■ Day trip ■ No paid lodging ■ 30+ night stay

Year	Day trip	No paid lodging	30+ night stay
2018	60%	40%	0%
2017	63%	37%	1%

Non-target summer trips	Day trip		No paid lodging	
	2017 (a)	2018 (b)	2017 (c)	2018 (d)
Length of stay	0	0	3.8	3.8
Average # visits/year	4.1	6.1	4.7	3.9
First time trips	34%cd	38%cd	24%	15%

2017 day trip n=252 (a); 2018 day trip n=125 (c); 2017 no paid lodging n=153 (b); 2018 no paid lodging n=78 (d)
a / b / c / d indicate statistically significant differences at the 95% level.

Comparing Target to Other Travelers

Began planning summer trip	2017			2018		
	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	4%	26% ad	16% ad	4%	28% ad	21% ad
1-2 weeks	5%	14% a	17% a	8%	18% a	12%
3 weeks - 1 month	13%	17%	25% a	17%	22%	29% a
2 - 3 months	34% bef	17%	23%	27% b	18%	16%
4-6 months	25% be	11%	15%	24% be	6%	15%
6+ months	18% c	15% c	4%	19% c	9%	7%

GS/OB is only destination visited on this trip	2017			2018		
	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)
	89% bef	82%	81%	91% bcef	77%	75%

2017 target n=891 (a), day trip n=242 (b), no paid lodging n=142 (c); 2018 target n=407 (d), day trip n=114 (e), no paid lodging n=75 (f)
a / b / c / d / e / f indicate statistically significant differences at the 95% level.

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

Comparing Target to Other Travelers

Resources used to plan GS/OB trip	2017			2018		
	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	31%	34%	37%	34% e	22%	37%
Social media	13%	12%	11%	8%	15%	11%
Booking websites or apps	15%	15%	15%	10%	12%	4%
Hotel websites	19% d	17%	15%	12%	11%	9%
Gulf Shores & Orange Beach Tourism website	21% be	11%	13%	16%	10%	12%
Local vacation rental company sites	18% bf	5%	12%	17% bf	10%	4%
Travel advice websites or apps	10%	8%	6%	9%	9%	7%
Vacation home rental booking sites/apps	37% bcef	5%	9%	40% bcef	7%	3%
Travel/visitor guide	12% d	10%	10%	5%	7%	9%
Traveler review sites or apps	18% bcdef	9%	7%	9%	6%	3%
Travel blogs	5%	4%	6%	4%	4%	8%
Alabama's official tourism website	6%	5%	5%	5%	4%	1%
Magazine and newspaper articles	2%	5%	2%	1%	4%	3%

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=891 (a), day trip n=242 (b), no paid lodging n=142 (c); 2018 target n=407 (d), day trip n=114 (e), no paid lodging n=75 (f)
a / b / c / d / e / f indicate statistically significant differences at the 95% level.

Comparing Target to Other Travelers

Children on trip	2017			2018		
	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	49%[bdf]	28%[ad]	40%[d]	63%[abcef]	33%[d]	27%[ad]
Of trips with children: *2017 target n=54, day trip n=11, no paid lodging n=10; 2018 target n=61, day trip n=6, no paid lodging n=9*						
< 6 years old	34%[bd]	9%[acdf]	40%[b]	50%[ab]	33%	44%[b]
6-11 years old	59%[bd]	45%[a]	70%	62%[a]	50%	67%
12-17 years old	60%[e]	55%[e]	40%	45%[e]	17%[abd]	44%

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		
	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	91%[b]	78%	85%	92%	85%	85%
Bus	2%	4%	3%	2%	5%	1%
Airplane	7%	17%[a]	11%	6%	9%	13%
Other	0%	0%	2%	0%	1%	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.

2017 target n=891 (a), day trip n=242 (b), no paid lodging n=142 (c); 2018 target n=407 (d), day trip n=114 (e), no paid lodging n=75 (f)
a / b / c / d / e / f indicate statistically significant differences at the 95% level.

Comparing Target to Other Travelers

	2017			2018		
	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	5.4[bc]	3.0	3.2	5.0[ef]	2.8	3.3

Trip spending	2017			2018		
	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	$1,606[bcef]	$-	$367	$1,408[bcef]	$ -	$257
Meals/food/groceries	$471[bcef]	$194	$212	$410[bcef]	$206	$219
Shopping	$294[bcef]	$161	$239	$266[bcef]	$208	$182
Recreation or entertainment	$242	$112	$135	$173	$116	$132
Transportation within Gulf Shores	$64	$78	$62	$64	$79	$72
Other	$65	$22	$113	$54	$64	$14
TOTAL	$2,741[bc]	$672	$1,248	$2,375[cd]	$778	$990
Per person spending	**$508**	**$189**	**$353**	**$475**	**$240**	**$265**

2017 target n=891 (a), day trip n=242 (b), no paid lodging n=142 (c); 2018 target n=407 (d), day trip n=114 (e), no paid lodging n=75 (f)

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

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

Comparing Target to Other Travelers

Demographics		2017			2018		
		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	24%	32%[c]	19%	29%	31%	28%
	Female	76%	68%	81%[b]	71%	69%	72%
Age	Average	44	46	43	47	47	52[de]
Marital status	Married	71%	62%[c]	48%	73%	59%	66%
	Divorced/Separated	12%	17%	16%	8%	17%	9%
	Widowed	3%	5%	9%	6%	4%	6%
	Single/Never married	14%	17%	28%[b]	14%	20%	18%
HH income	Average	$120,083	$80,628	$100,733	$124,837	$85,680	$115,700

2017 target n=891 (a), day trip n=242 (b), no paid lodging n=142 (c); 2018 target n=407 (d), day trip n=114 (e), no paid lodging n=75 (f)
a / b / c / d / e / f indicate statistically significant differences at the 95% level.

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

Comparing Target to Other Travelers

Top 2 Box	2017			2018		
	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	94%[bc]	81%	86%	93%[e]	82%	95%
Is easy to get to by car	90%[bc]	75%	84%	93%[e]	77%	89%
Has beautiful beaches	90%[bc]	82%	83%	93%[e]	82%	88%
Has a "family-friendly" atmosphere	93%[bc]	81%	84%	95%[e]	82%	92%
Is a safe destination	93%[bc]	81%	88%	95%[e]	80%	97%[e]
Has a clean, unspoiled environment	83%[b]	70%	83%	89%[e]	75%	88%
Offers plenty to see and do	88%[b]	75%	84%	92%[e]	82%	86%
Has nice weather	93%[bc]	81%	87%	93%[e]	81%	85%
Provides warm Southern hospitality	92%[bc]	75%	82%	91%[e]	78%	85%
Has a variety of dining options at several price points	88%[bc]	74%	77%	93%[ef]	78%	85%
Has a variety of lodging options at multiple price points	87%[bc]	70%	77%	90%[ef]	76%	74%
Has beautiful scenery	90%[b]	80%	88%	93%[e]	79%	89%
Has warm weather	96%[bc]	80%	91%	97%[ef]	85%	91%
Offers a good vacation value for the money	89%[bc]	69%	77%	88%[e]	69%	86%

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=891 (a), day trip n=242 (b), no paid lodging n=142 (c); 2018 target n=407 (d), day trip n=114 (e), no paid lodging n=75 (f)
a / b / c / d / e / f indicate statistically significant differences at the 95% level.

Comparing Target to Other Travelers

Overall experience	2017			2018		
	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)
Top 2 Box Rating	**88%**	**68%**	**75%**	**89%**	**70%**	**87%**
5 (Excellent)	50%[b]	35%	46%	56%[e]	40%	51%
4 (Very good)	38%	33%	30%	34%	30%	36%
3 (Good)	10%	28%[a]	20%[a]	10%	23%[d]	13%
2 (Fair)	1%	3%	4%	0%	6%[d]	0%
1 (Poor)	1%	1%	1%	0%	1%	0%

Likelihood to recommend	2017			2018		
	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)
Top 2 Box Rating	**91%**	**79%**	**84%**	**92%**	**82%**	**93%**
5 (Extremely likely)	65%[b]	50%	61%	69%[e]	61%	67%
4	26%	28%[a]	22%	22%	21%	26%
3	8%	17%[a]	10%	7%	16%[d]	7%
2	1%	3%	6%[a]	1%	2%	
1 (Not at all likely)	0%	2%[a]		0%	1%	

2017 target n=891 (a), day trip n=242 (b), no paid lodging n=142 (c); 2018 target n=407 (d), day trip n=114 (e), no paid lodging n=75 (f)
a / b / c / d / e / f indicate statistically significant differences at the 95% level.

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

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

Comparing Target to Other Travelers

Likelihood to visit again in the next year	2017			2018		
	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)	**74%**	**66%**	**72%**	**77%**	**67%**	**82%**
5 (Already planning a trip)	27%[b]	17%	31%	29%	25%	35%[b]
4 (Very likely)	48%	49%	41%	48%	42%	47%
3 (Somewhat likely)	20%	25%	21%	19%	27%	14%
2 (Not very likely)	4%	5%	6%	3%	4%	3%
1 (Not at all likely)	1%	4%	1%	2%	3%	1%

During which season(s) would you be most likely to visit (of those likely to visit)	2017			2018		
	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	24%	26%	30%	29%	36%	39%
Summer	80%	72%	70%	76%	66%	64%
Fall	25%	26%	26%	24%	28%	38%
Winter	6%	7%	8%	7%	13%	14%

2017 target n=891 (a), day trip n=242 (b), no paid lodging n=142 (c); 2018 target n=407 (d), day trip n=114 (e), no paid lodging n=75 (f)
a / b / c / d / e / f indicate statistically significant differences at the 95% level.

Question text: How likely are you to visit Gulf Shores/Orange Beach in the next year? Response options: Not at all likely, Not very likely, Somewhat likely, Very likely, Already planning a trip
Question text: [IF SOMEWHAT LIKELY OR ABOVE] During which season(s) would you be most likely to visit? Select all that apply. Response options: Spring, Summer, Fall, Winter

Comparing Target to Other Travelers

Top states of origin	2017			2018		
	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	17%	17%	18%	21%	21%	28%
Louisiana	17%[b]	6%	9%	20%[bce]	8%	7%
Georgia	9%	7%	7%	10%	12%	8%
Texas	12%	16%[d]	18%[d]	9%	10%	17%
Arkansas	6%[b]	1%	1%	8%[b]	2%	0%
Tennessee	6%	5%	8%	8%	6%	8%
Florida	7%	18%[ad]	15%[ad]	7%	18%[ad]	16%
Mississippi	6%	8%	5%	7%	6%	5%
Indiana	4%	2%	1%	4%	4%	0%
Oklahoma	2%	3%	2%	3%	3%	1%
Kentucky	2%	2%	1%	2%	2%	1%
Missouri	4%[d]	1%	2%	1%	3%	0%
Wisconsin	1%	1%	0%	1%	3%	0%
Illinois	2%	3%[d]	4%[d]	0%	2%	1%
Michigan	1%	2%	3%[d]	0%	0%	0%
Ohio	3%	5%	2%	0%	1%	0%

2017 target n=891 (a), day trip n=242 (b), no paid lodging n=142 (c); 2018 target n=407 (d), day trip n=114 (e), no paid lodging n=75 (f)
a / b / c / d / e / f indicate statistically significant differences at the 95% level.

Comparing Non-Target Trips Year-Over-Year

General activities (non-target trips)	2017			2018		
	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	82%[bcef]	48%	55%	80%[bcef]	44%	61%[e]
Dining out	64%[bcef]	35%	49%[b]	62%[bef]	33%	40%
Swimming	64%[bcef]	29%	45%[b]	59%[bcef]	28%	37%
Relaxing	63%[bce]	40%	46%	58%[be]	39%	56%
Shopping	55%[bde]	36%	46%[e]	46%[e]	25%	39%
Sightseeing	28%	34%[c]	19%	30%	26%	19%
Shelling	17%[be]	10%	11%	19%[be]	4%	15%
Exercise/working out	14%[bf]	5%	9%	15%[bf]	9%	3%
Fishing	13%	9%	15%	14%	14%	8%
Bars/nightlife	16%	13%	14%	13%	11%	13%
Photography	12%	12%	11%	13%	9%	8%
Boating or sailing	11%	7%	7%	12%	5%	7%
Watching wildlife	8%	9%	12%	11%	4%	7%
Visiting friends/relatives who live in the area	7%	11%	15%[a]	11%	11%	19%[a]
Family/friends reunion	7%	11%	10%	10%	11%	19%[a]
Dolphin tour	11%	7%	11%	10%	4%	4%
Bicycle riding	5%	3%	6%	6%	4%	7%
Parasailing/jet skiing	9%[b]	3%	4%	6%	3%	3%
Historical sites	8%	12%	11%	6%	11%	5%
Visiting a spa	5%	5%	6%	5%	4%	0%
Scuba diving/snorkeling	5%	4%	5%	5%	6%	3%
Sporting events	4%	5%	6%	5%	3%	1%
Golfing	6%	5%	4%	5%	4%	7%
Kayaking/canoeing/paddle boarding	7%	4%	4%	5%	3%	5%
Tennis	3%	1%	1%	3%	3%	3%
Hiking on trails	6%	5%	12%[bdf]	3%	6%	1%
Birdwatching	4%	4%	6%	3%	4%	5%
Concerts and nightlife	7%[d]	2%	13%[de]	2%	1%	5%
Festivals or special events (non-sports events)	4%	5%	7%[d]	1%	1%	1%

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=891 (a), day trip n=242 (b), no paid lodging n=142 (c); 2018 target n=407 (d), day trip n=114 (e), no paid lodging n=75 (f) a / b / c / d / e / f indicate statistically significant differences at the 95% level.

Comparing Non-Target Trips Year-Over-Year

Specific attractions (non-target trips)	2017			2018		
	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	11%[e]	5%	7%	12%[be]	1%	5%
Alabama Gulf Coast Zoo	9%[de]	4%	6%	5%	2%	3%
Alabama's Coastal Connection Scenic Byway	8%[bc]	3%	2%	5%	2%	1%
Battleship USS Alabama	10%[e]	6%	6%	5%	2%	3%
Bellingrath Gardens	2%	2%	1%	2%	2%	0%
Bon Secour National Wildlife Refuge	3%	2%	3%	1%	0%	1%
Dauphin Island	10%	5%	6%	6%	6%	3%
Fort Morgan Historic Site	9%[bde]	2%	4%	3%	2%	5%
Gulf State Park	11%	10%	12%	11%	6%	8%
Hugh S. Branyon Backcountry Trail	2%	0%	1%	0%	1%	0%
National Naval Aviation Museum	6%[d]	2%	4%	1%	4%[d]	4%
OWA Park	1%	2%	4%[a]	2%	1%	3%
Tanger Outlets	30%[bce]	12%	18%	30%[be]	9%	20%
The Track	10%[b]	2%	6%	9%[b]	3%	1%
The Wharf	23%[bce]	5%	11%	18%[be]	6%	12%
Waterville	8%[b]	2%	6%	7%	6%	3%

2017 target n=891 (a), day trip n=242 (b), no paid lodging n=142 (c); 2018 target n=407 (d), day trip n=114 (e), no paid lodging n=75 (f)
a / b / c / d / e / f indicate statistically significant differences at the 95% level.

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