



**GULF SHORES &
ORANGE BEACH
TOURISM**

Alabama's White-Sand Beaches

Visitor Profile Research

Summer 2019

Strategic Marketing & Research Insights LLC

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Introduction

Visitor Profile Research – Summer 2019

Background

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

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 day trippers and compare those metrics to target visitors



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



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

Methodology

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

Number of trips represented in the data	Summer 2019
Target trips (stayed 1-30 nights in paid accommodations)	500
Non-target trips (visited but did not stay overnight)	125

Identifying Visitor Origins: Methodology

1. Find visitors



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

2. Survey visitors



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

*Problems with intercept methodology:

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

Identifying Visitor Origins: UberMedia

- UberMedia is a mobile data analytics company providing location-based behavioral information and analytical insights. The company's capabilities are in the collection, preparation and dissemination of mobile consumer data focused on location and behavioral information. UberMedia develops solutions for mobile advertising, location measurement, and business intelligence.
- While the numbers fluctuate on a monthly basis, and UberMedia is always adding mobile devices to its database, on average, the company accesses location-based data from approximately 300 million devices in America and 1 billion outside of America, for a total of approximately 1.3 billion total unique devices every month. UberMedia pulls location-based data from more than 150,000 different apps every month. These apps consist of a very broad spectrum of apps in order to engage a wide array of nationalities, demographics, and audience profiles, including The Weather Channel, TextNow, DraftKings, MeetMe, CBS Sports, TuneIn Radio, Paint by Numbers, Skout, theCHIVE, Jigsaw Collection HD, Tagged, TheScore, TV Guide, Twitter, Trebel Music, UNICORN – Color by Number Game, Solitaire One, and Spades. UberMedia has stored location-based data on its servers since 2015, allowing a look back to that period.
- In the subject study, UberMedia saw 219,056 unique non-resident devices that entered the defined GS/OB area during summer 2019. (Unique meaning that if the same device was in GS/OB on multiple occasions, it was only counted once). These devices identified the markets in which SMARInsights surveyed to find summer visitors.

Accuracy and Limitations of Mobile Location Data

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



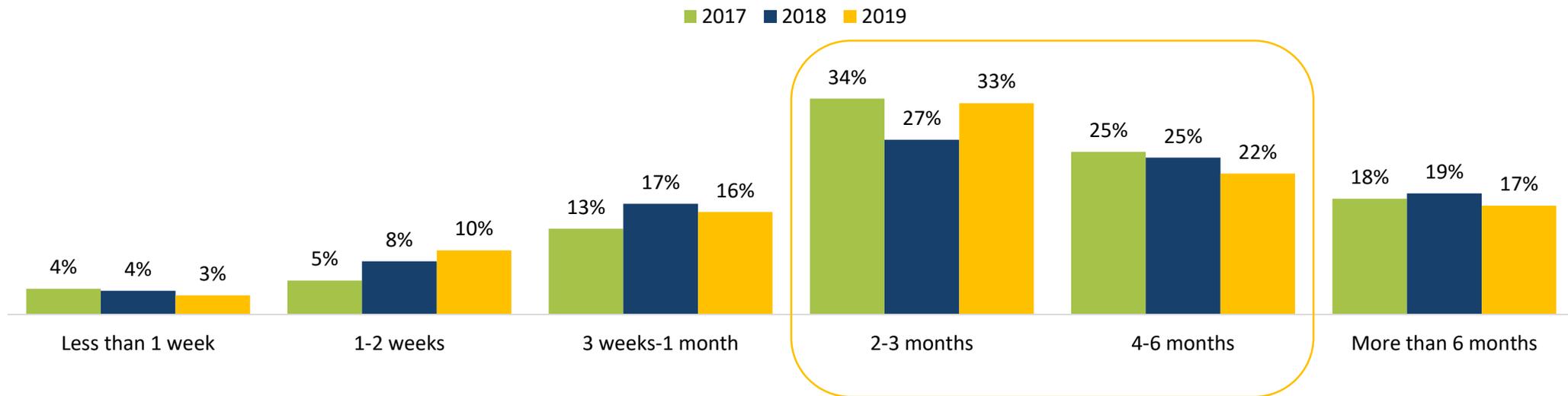
Detailed Findings

Visitor Profile Research – Summer 2019

Travel Planning

- Half of summer 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?

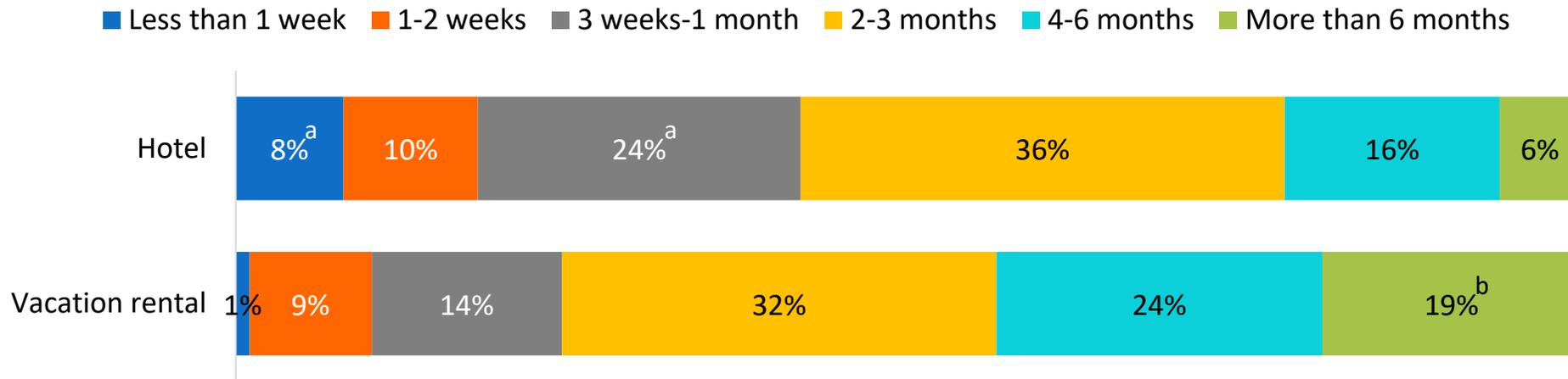


Question text: How far in advance did you begin planning your trip to Gulf Shores/Orange Beach? Response options as shown in graph above.

Travel Planning – Hotel vs. Condo Rental

- Hotel stayers tend to plan in the short term. More than a third of summer hotel trips are planned in a month or less.

Summer Trip Planning Horizon by Lodging Type

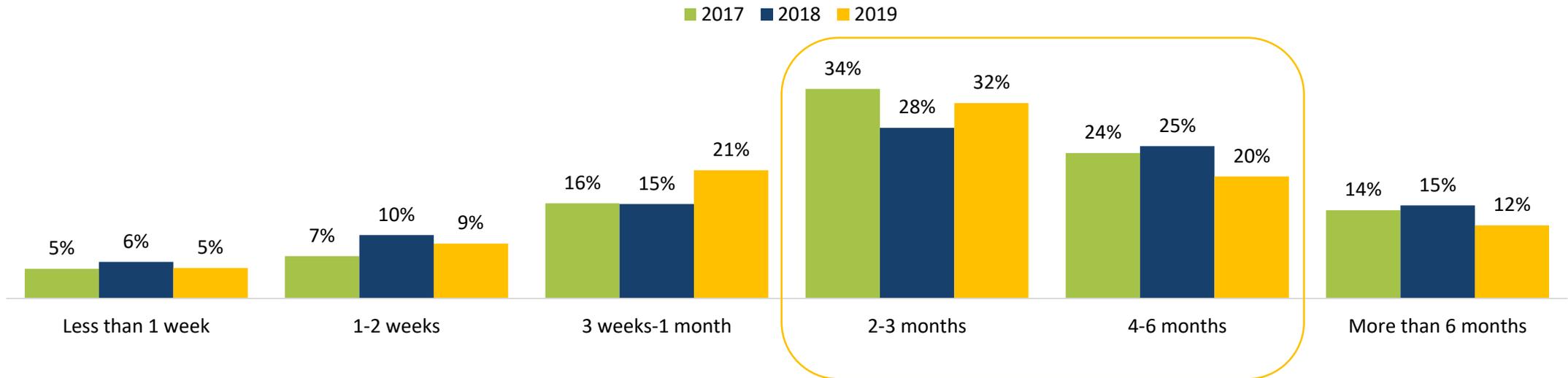


Vacation rental/condo n=200 (a); Hotel/motel n=300 (b); a / b indicate statistically significant differences at the 95% level.
Question text: How far in advance did you begin planning your trip to Gulf Shores/Orange Beach? Response options as shown in graph above.

Travel Planning

- As with trip planning overall, 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?

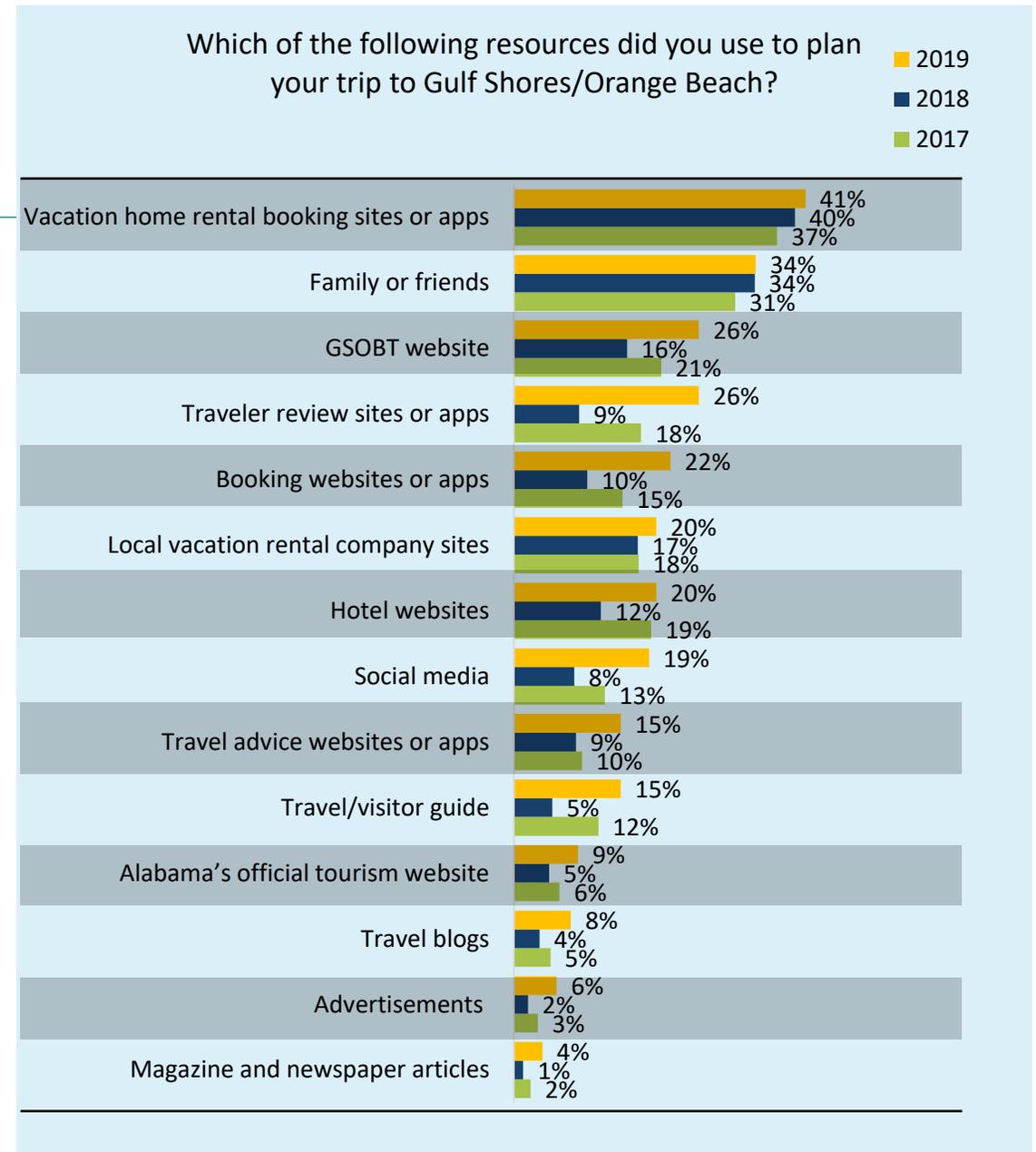


Question text: How far in advance did you book your lodging in Gulf Shores/Orange Beach? Response options as shown in graph above.

Travel Planning

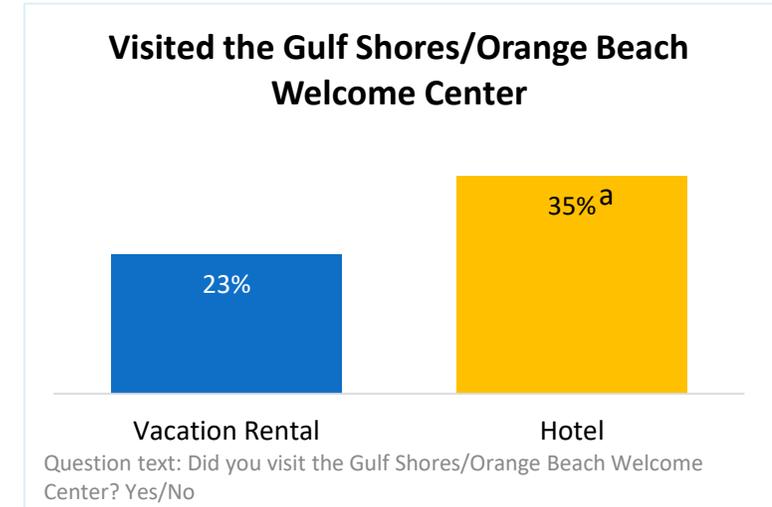
- The top summer visit planning resources remain vacation home rental sites/apps and family and friends.
- A quarter of summer visitors used the GSOBT website to help plan their trip, which is an increase from prior measures and coincides with launch of a new website.
- The higher share of summer visitors using all of these resources is due to first-time visitors. First-time visitors use these resources at a higher rate than repeat visitors, with the exception of location vacation rental and vacation rental booking sites.

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.

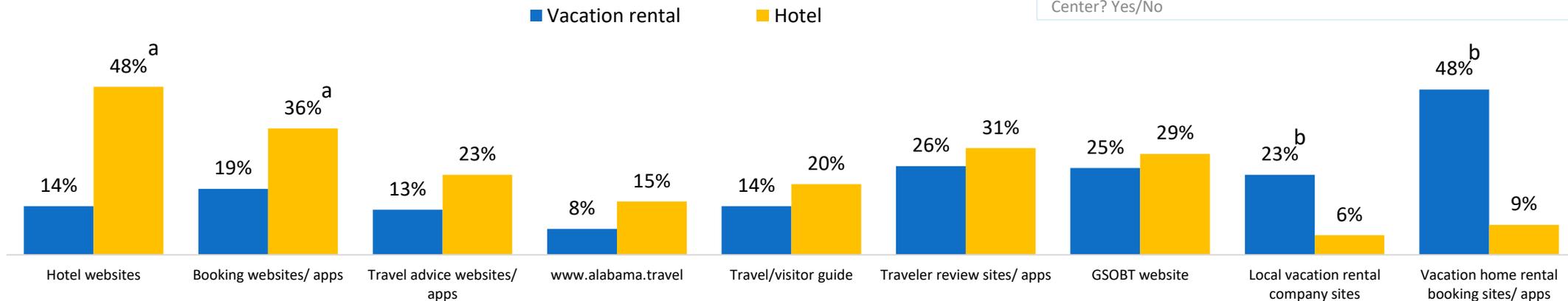


Travel Planning – Hotel vs. Condo Rental

- 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 on travel advice and destination sites/apps more than vacation rental stayers.
- Hotel stayers use the welcome centers at a higher rate as well.



Trip planning resources with biggest difference by lodging type

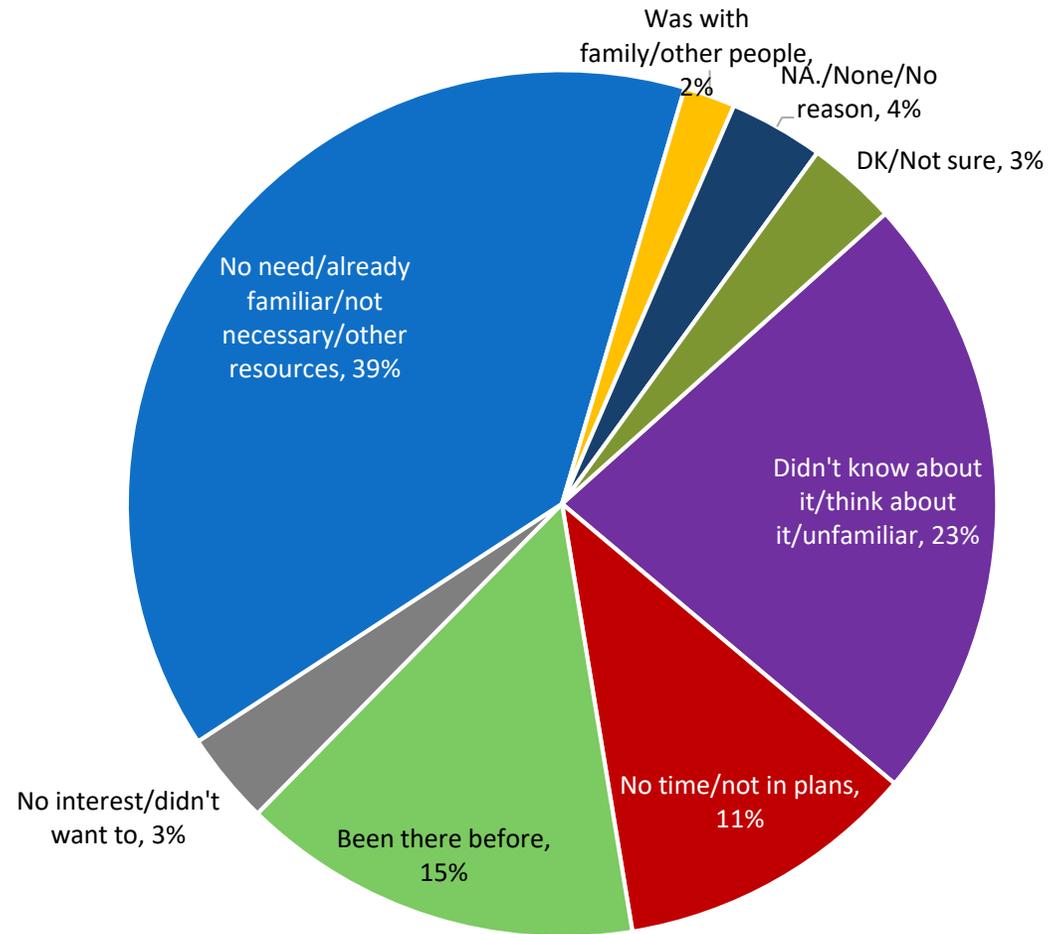


Vacation rental/condo n=200 (a); Hotel/motel n=300 (b); a / b indicate statistically significant differences at the 95% level.
 Question text: Which of the following resources did you use to plan your trip to Gulf Shores/Orange Beach? ? Response options as shown in graph above.

Travel Planning

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

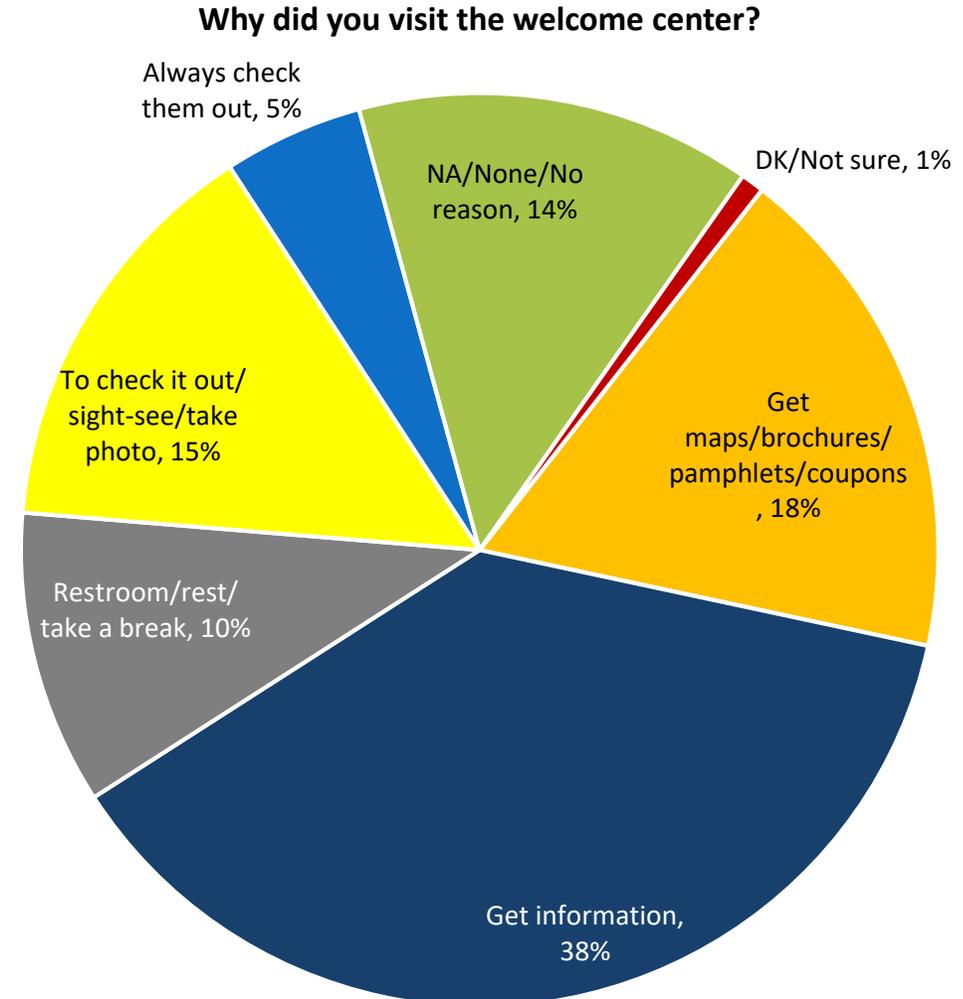
Why didn't you visit the welcome center?



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

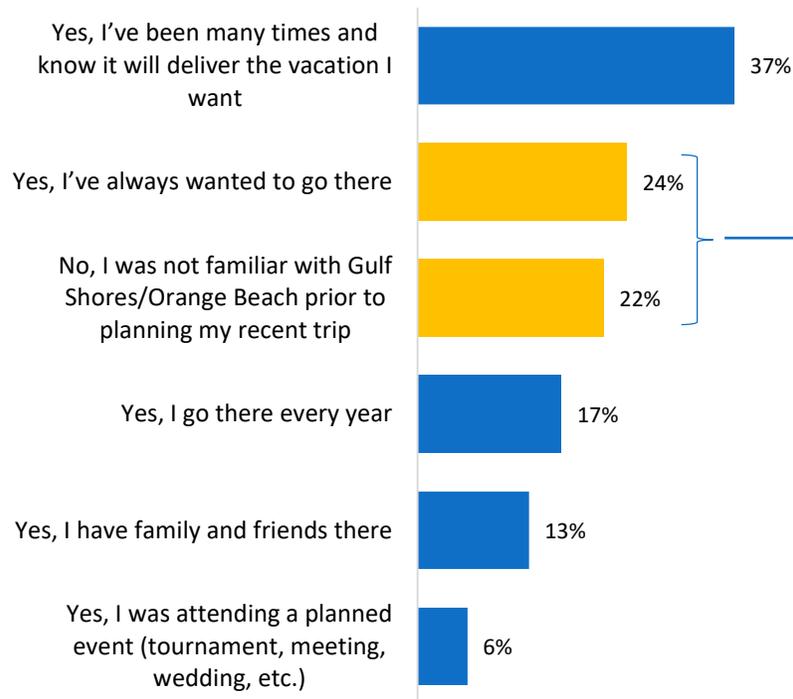
Travel Planning – Welcome Center Visitors

- Nearly 4 in 10 summer visitors who stopped at the visitor center did so to get information.
- The next most common reason is for specific sources of information – maps, coupons, etc.

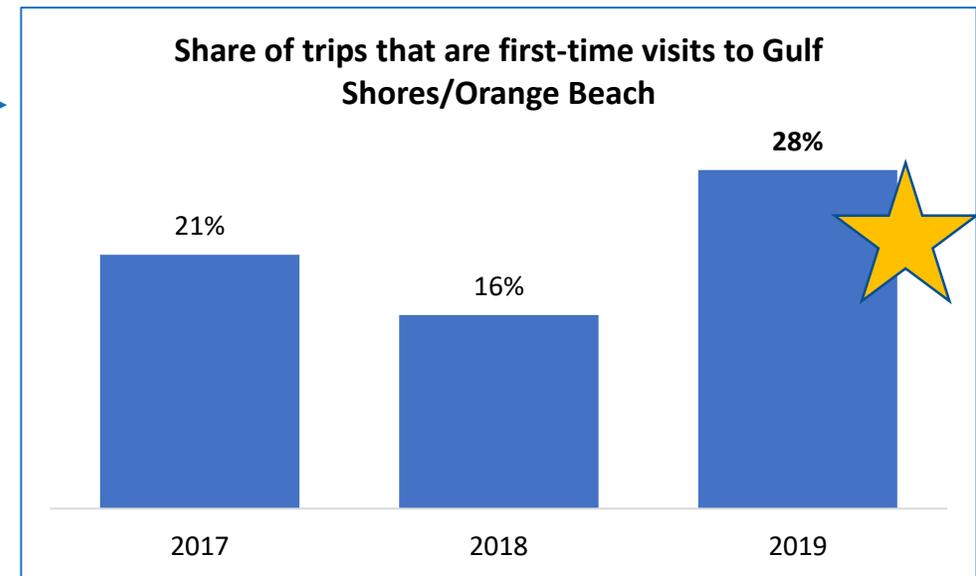


Trip Characteristics

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



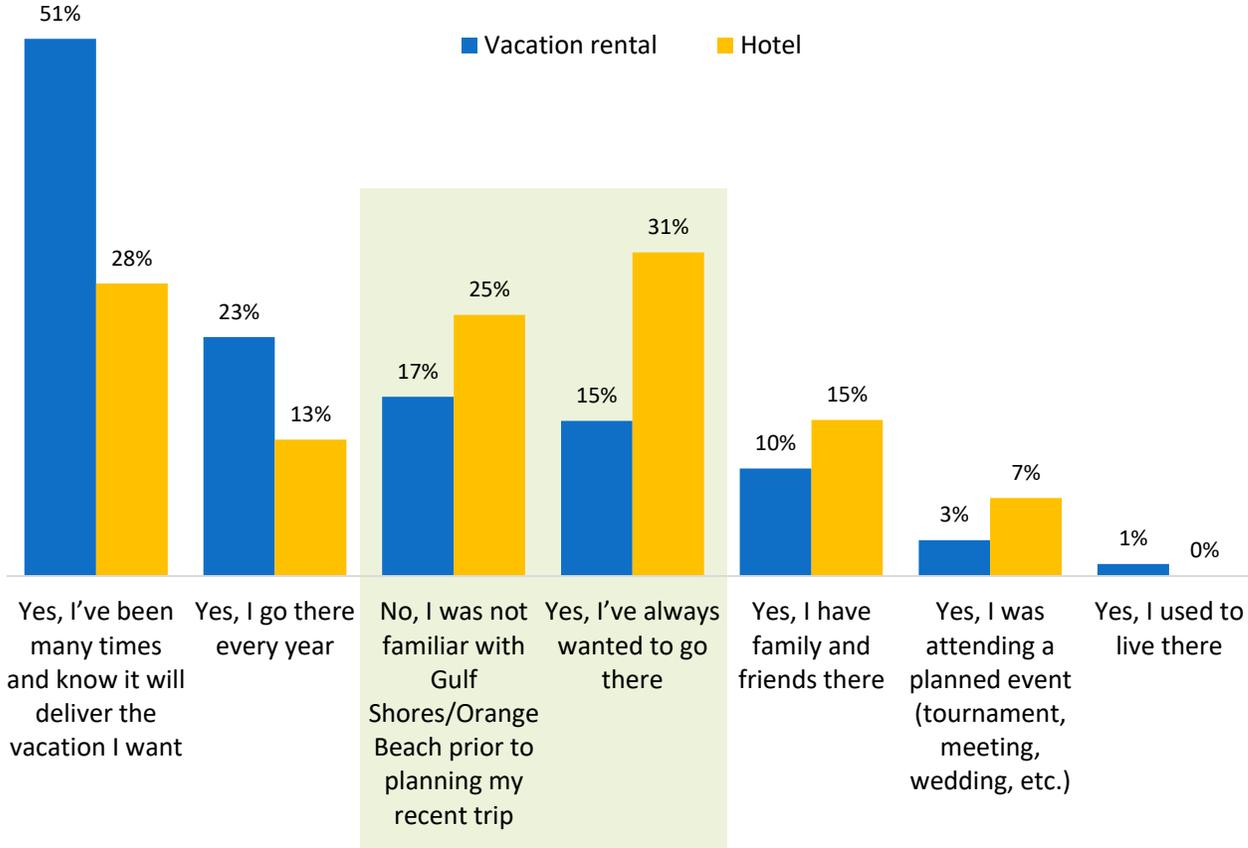
- As we saw in spring 2019, more new visitors are coming to the destination. This summer saw an increase in first-time visitors.



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

Vacation renters know the destination and are repeat visitors. Hotel stayers tend to be aspirational new visitors.

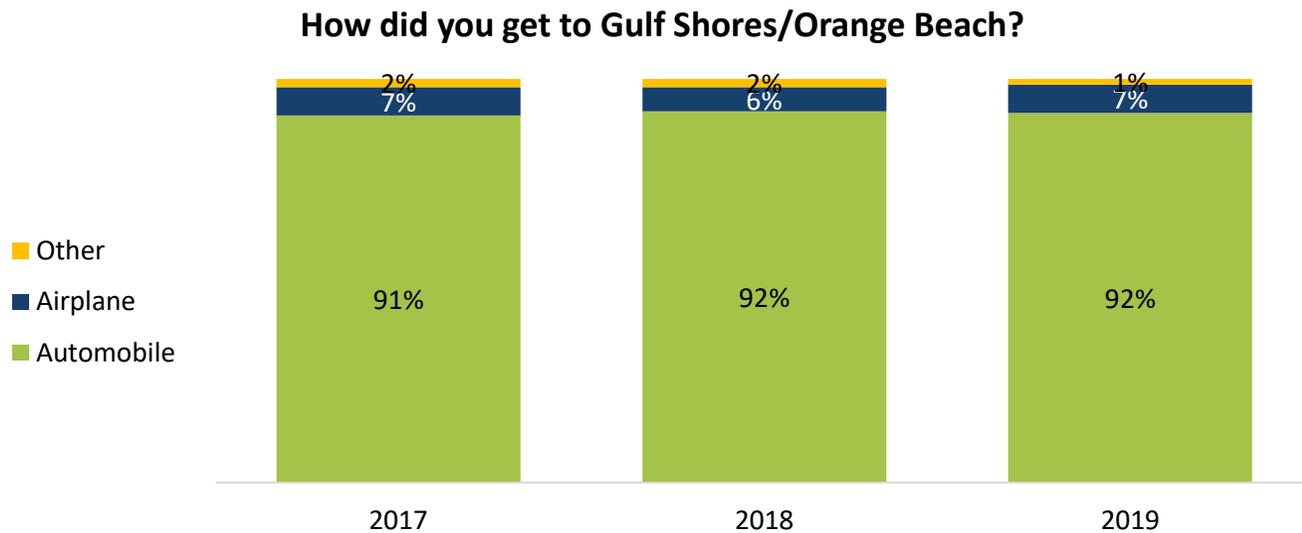
Differences in Reasons for Familiarity



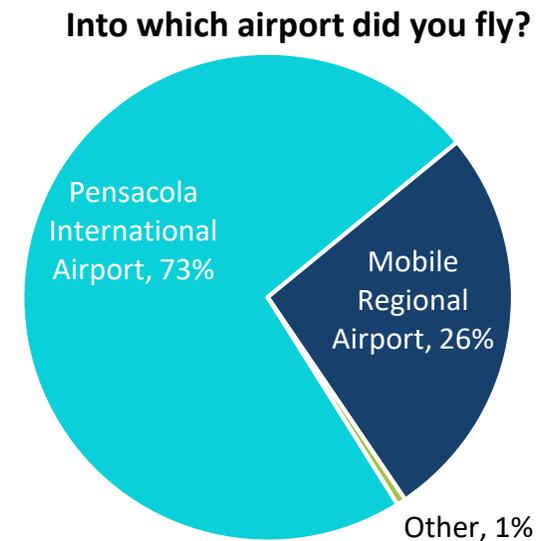
Vacation rental/condo n=200 (a); Hotel/motel n=300 (b); a / b indicate statistically significant differences at the 95% level. Question text: Prior to your visit, was Gulf Shores/Orange Beach familiar to you? Response options as shown in graph above.

Trip Characteristics

- Most summer visitors drive to GS/OB, consistent with prior measures. Over half of those who flew came from Chicago, Memphis, Dallas, and Peoria.
- Of those who flew, almost three-fourths flew 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.



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

Trip Characteristics

- We consistently see that 80% of summer visits include the beach, followed by dining out, relaxing, and swimming.
- Half of summer trips include shopping.

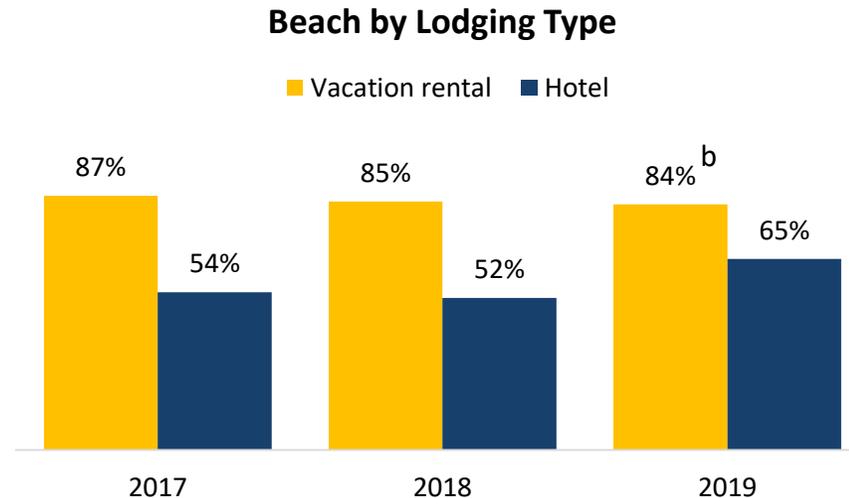
Summer trip participation	2017	2018	2019
Beaches	82%	80%	81%
Dining out	64%	62%	67%
Relaxing	63%	58%	65%
Swimming	64%	59%	58%
Shopping	55%	46%	54%
Sightseeing	28%	30%	37%
Tanger Outlets	30%	30%	32%
The Wharf	23%	18%	28%
Shelling	17%	19%	19%
Watching wildlife	8%	11%	16%
Exercise/Working out	14%	15%	15%
Adventure Island	11%	12%	15%
Fishing	13%	14%	14%
Dolphin tour	11%	10%	14%
Alabama's Coastal Connection	8%	5%	14%
Dauphin Island	10%	6%	13%
Historical sites	8%	6%	13%
Gulf State Park	11%	11%	13%
Alabama Gulf Coast Zoo	9%	5%	13%
Hiking on trails	6%	3%	12%
The Track	10%	9%	12%
Visiting friends/family in the area	7%	11%	12%
Photography	12%	13%	12%
Fort Morgan Historic Site	9%	3%	12%
Battleship USS Alabama	10%	5%	12%
Boating or sailing	11%	12%	11%

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

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

- 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 among vacation renters, are beaches, relaxing, dining out, swimming, shopping, and sightseeing. But hotel stays tend to be shorter and generally include fewer activities.



Question text: What attractions and activities did you visit or participate in while in Gulf Shores/Orange Beach on your trip? Response chosen: beach
Condo/vacation rental 2019 n=200 (a); Hotel/motel 2019 n=300 (b)
a / b indicate statistically significant differences at the 95% level.

Trip Characteristics

- Seven in 10 summer visits are motivated by the beach, meaning that visitors chose Gulf Shores/Orange Beach because of this asset.
- Of summer visitors, 40% say the area was their choice due to the opportunity it provides for relaxation.

Summer trip motivators	2017	2018	2019
Beaches	75%	73%	73%
Relaxing	41%	40%	40%
Dining out	24%	25%	31%
Swimming	28%	28%	19%
Shopping	14%	17%	13%
Tanger Outlets	8%	10%	12%
Sightseeing	9%	10%	11%
Fishing	5%	5%	7%
Dolphin tour	4%	4%	7%
Adventure Island	2%	5%	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

- Summer trip spending is down somewhat, due to lower vacation renter spending and smaller travel parties.

Average Travel Party Expenditures per Trip – SUMMER	2017		2018		2019	
	Spending	% of total	Spending	% of total	Spending	% of total
Lodging	\$1,606	59%	\$1,408	59%	\$1,272	56%
Meals/food/groceries	\$471	17%	\$410	17%	\$415	18%
Shopping	\$294	11%	\$266	11%	\$275	12%
Recreation or entertainment	\$242	9%	\$173	7%	\$203	9%
Transportation within Gulf Shores	\$64	2%	\$64	3%	\$58	3%
Other	\$65	2%	\$54	2%	\$58	3%
TOTAL	\$2,741		\$2,375		\$2,280	

2017 n=585; 2018 n=377; 2019 n=500

Average Travel Party Expenditures per Trip – SUMMER	2017		2018		2019	
	Vacation rental	Hotel	Vacation rental	Hotel	Vacation rental	Hotel
Lodging	\$1,809	\$499	\$1,548	\$503	\$1,429	\$519
Meals/food/groceries	\$508	\$267	\$434	\$260	\$441	\$290
Shopping	\$308	\$219	\$268	\$254	\$278	\$260
Recreation or entertainment	\$255	\$173	\$172	\$178	\$203	\$207
Transportation within Gulf Shores	\$59	\$90	\$61	\$81	\$53	\$85
Other	\$48	\$157	\$57	\$40	\$42	\$131
TOTAL	\$2,986	\$1,405	\$2,540	\$1,315	\$2,445	\$1,492

Condo/vacation rental 2017 n=721; 2018 n=369; 2019 n=200

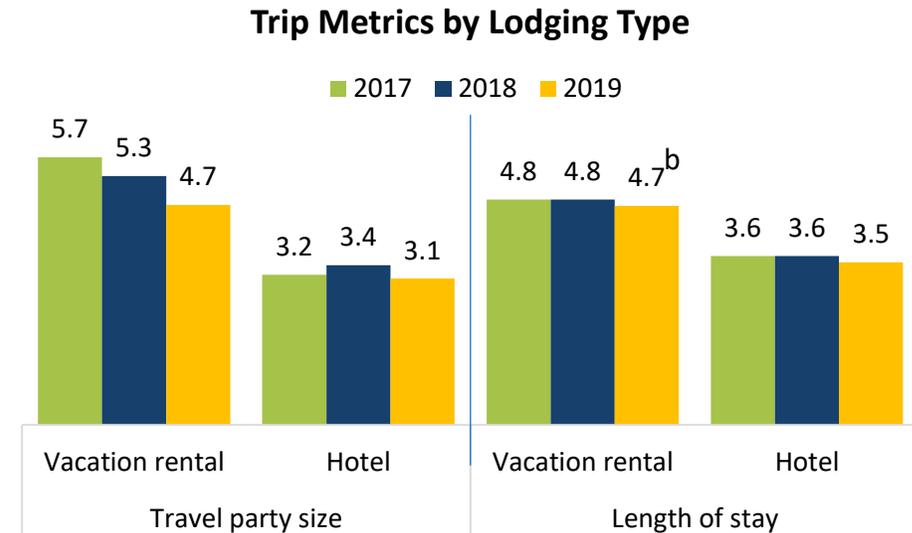
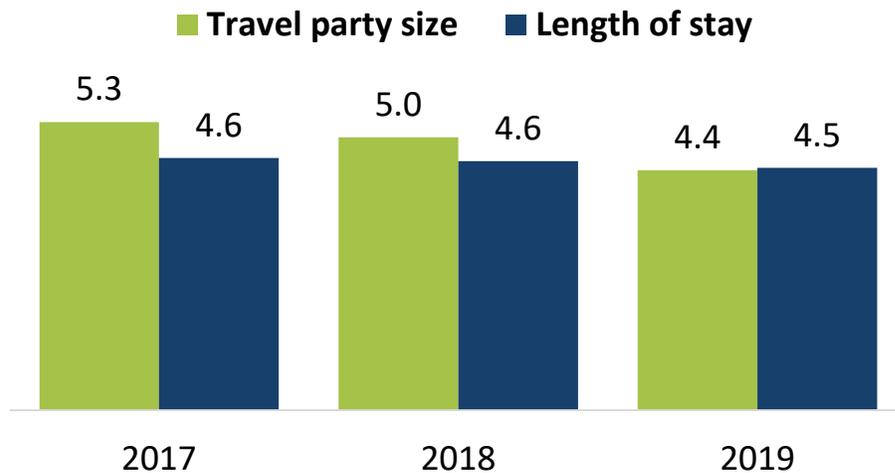
Hotel/motel 2017 n=145; 2018 n=63; 2019 n=300

Due to the small sample size of 2018 hotel/motel, 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 is lower this summer than last, while length of stay remains level.
- We see the decrease in travel party size mainly among vacation renters, but they still visit in groups of about 5, compared to 3-person travel parties for hotel stayers.



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

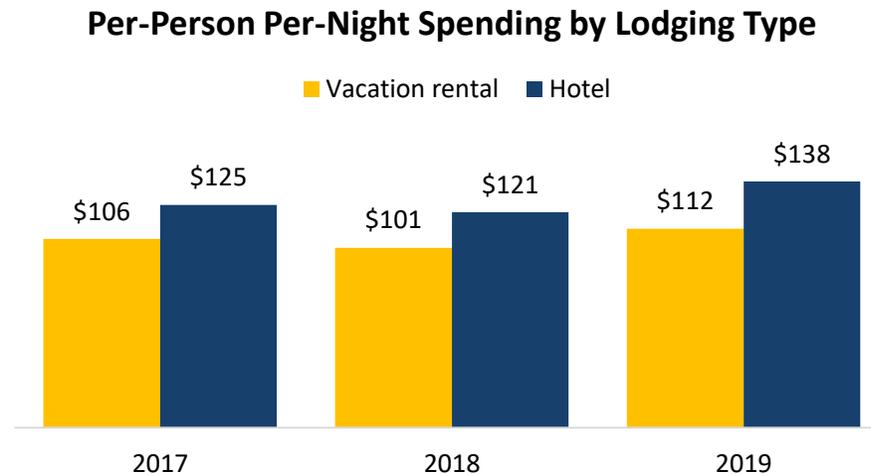
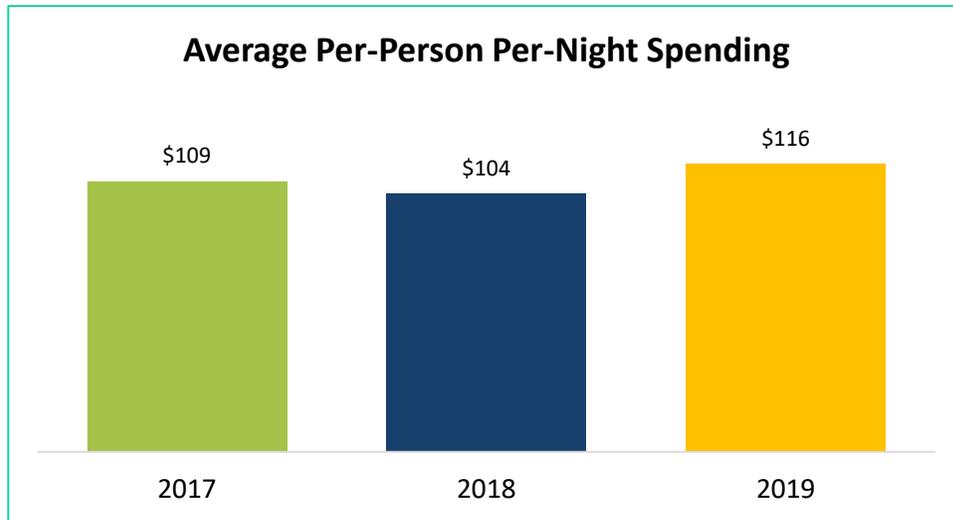
Condo/vacation rental 2017 n=721; 2018 n=369; 2019 n=200 (a)

Hotel/motel 2017 n=145; 2018 n=63; 2019 n=300 (b)

Due to the small sample size of 2018 hotel/motel stayers, these figures are presented as directional indicators.

Trip Characteristics

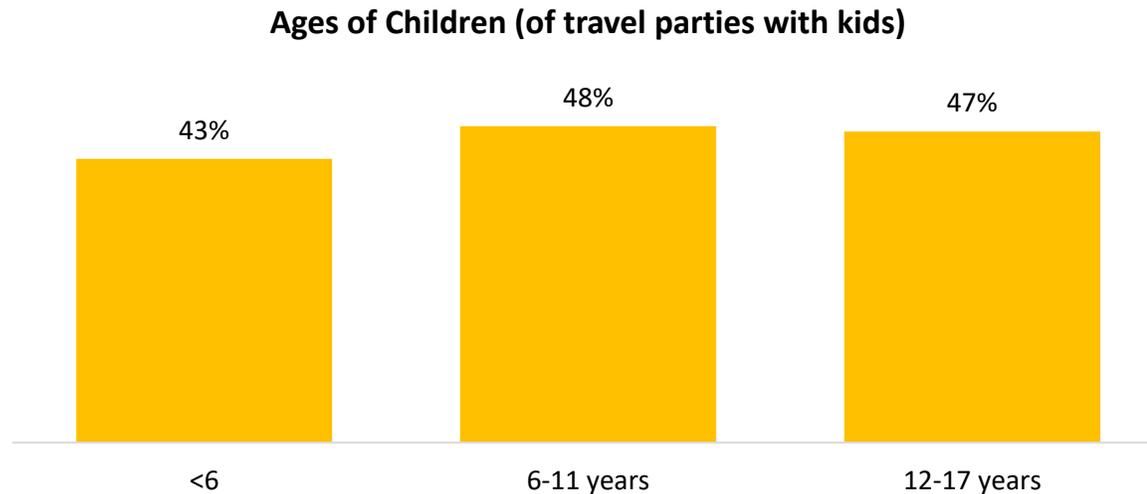
- Hotel spending consistently brings per-person per-night trip expenditures up. The per-person efficiency of vacation rentals is one of the appeals for larger groups and longer stays.



Question text: To help us better understand the economic impact of tourism, what was the approximate amount of money your travel party spent while in Gulf Shores/Orange Beach on your trip? [Category prompts] Including yourself, how many people were in your travel party? How many nights did you stay in Gulf Shores/Orange Beach during this trip? If you did not stay overnight, please enter '0'. Open-ended numeric responses.
Condo/vacation rental 2017 n=721; 2018 n=369; 2019 n=200
Hotel/motel 2017 n=145; 2018 n=63; 2019 n=300
Due to the small sample size of 2018 hotel/motel stayers, these figures are presented as directional indicators.

Travel Party Characteristics

- 59% of summer travel parties include children. This is higher than in spring, when 4 in 10 travel parties included kids.
- The children in spring travel parties tend to skew younger, with half under age 6 (which is in line with GSOBT marketing efforts). Summer trips have a more even distribution of age groups among kids.



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.
- We are beginning to see an increase in age and in household income.

Year-over-Year Demographic Profile Summer visitors		2017	2018	2019
Age	Average	42	45	46
Marital status	Married	67%	67%	67%
	Divorced/Separated	11%	10%	10%
	Single/Never married	19%	18%	20%
	Widowed	3%	5%	3%
HH income	Average	\$106,086	\$110,576	\$116,268

2017 n=859; 2018 n=426; 2019 n=507

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)

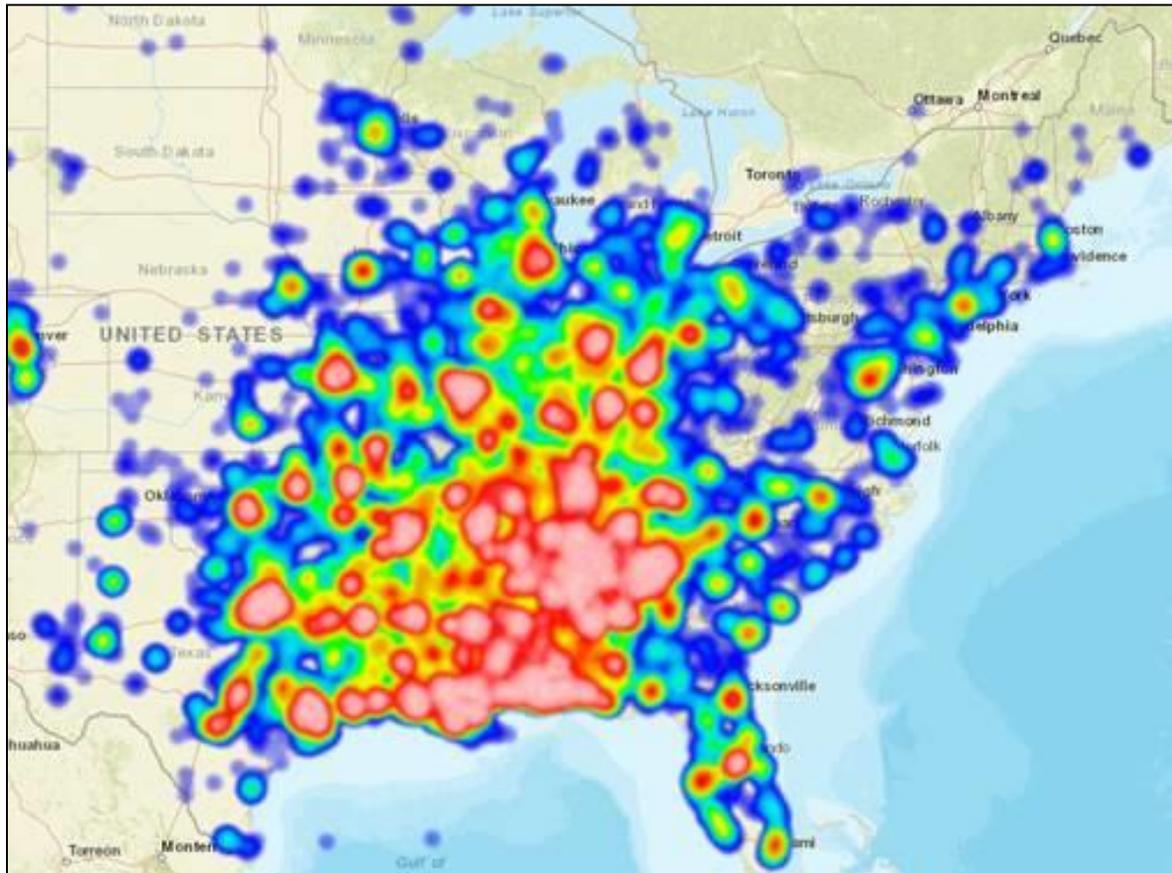
Travel Party Characteristics

- The average income increase is coming mainly from hotel stayers.

Summer demographic profile by lodging type		2017		2018		2019	
		Vacation rental/condo	Hotel	Vacation rental/condo	Hotel	Vacation rental/condo	Hotel
Age	Average	45	41	47	45	47	44
Marital status	Married	72%	65%	74%	63%	74%	63%
	Divorced/Separated	12%	10%	8%	11%	10%	12%
	Single/Never married	13%	22%	12%	21%	15%	22%
	Widowed	3%	3%	5%	5%	2%	3%
HH income	Average	\$124,276	\$99,267	\$129,215	\$100,198	\$124,220	\$111,074
Education	College grad+	64%	58%	70%	57%	73%	64%
Occupation	Executive/upper management	14%	18%	10%	19%	16%	21%
	IT professional	5%	10%	2%	8%	7%	12%
	Educator	14%	9%	13%	8%	12%	9%
	Homemaker	12%	13%	12%	11%	16%	11%
	Student	2%	1%	1%	2%	0%	2%
	Small business owner	4%	8%	6%	6%	3%	5%
	Skilled trade/service	6%	9%	9%	9%	10%	8%
	Other	23%	17%	21%	17%	18%	14%
	Retired	17%	10%	21%	14%	16%	13%
Not currently employed	2%	6%	4%	6%	2%	6%	
Ethnicity	Caucasian/White	88%	75%	88%	78%	89%	79%
	African-American/Black	6%	14%	5%	14%	5%	10%
	Latino/Hispanic	2%	6%	2%	6%	2%	7%
	Asian	2%	6%	2%	2%	3%	5%
	American Indian	1%	1%	1%	2%	2%	1%
	Other	2%	1%	2%	2%	1%	0%

Travel Party Characteristics

- Heat map showing source markets of summer visitors



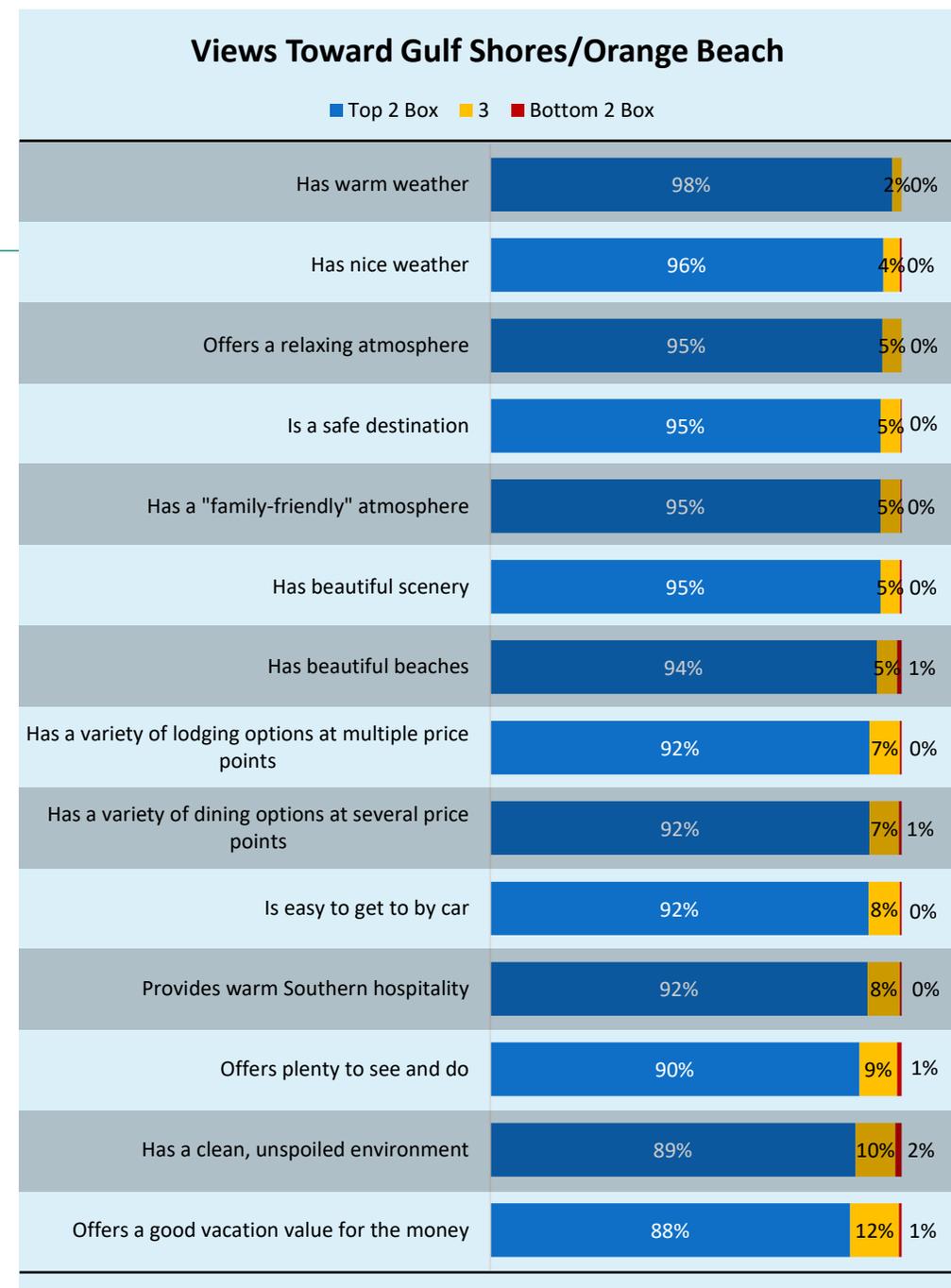
	2019
Alabama	28%
Louisiana	12%
Mississippi	9%
Texas	8%
Tennessee	7%
Florida	5%
Georgia	5%
Arkansas	4%
Missouri	4%
Kentucky	3%
Illinois	3%
Indiana	2%
Oklahoma	2%
Ohio	2%
Wisconsin	0%
Michigan	0%

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

Views Toward GS/OB & Trip Satisfaction

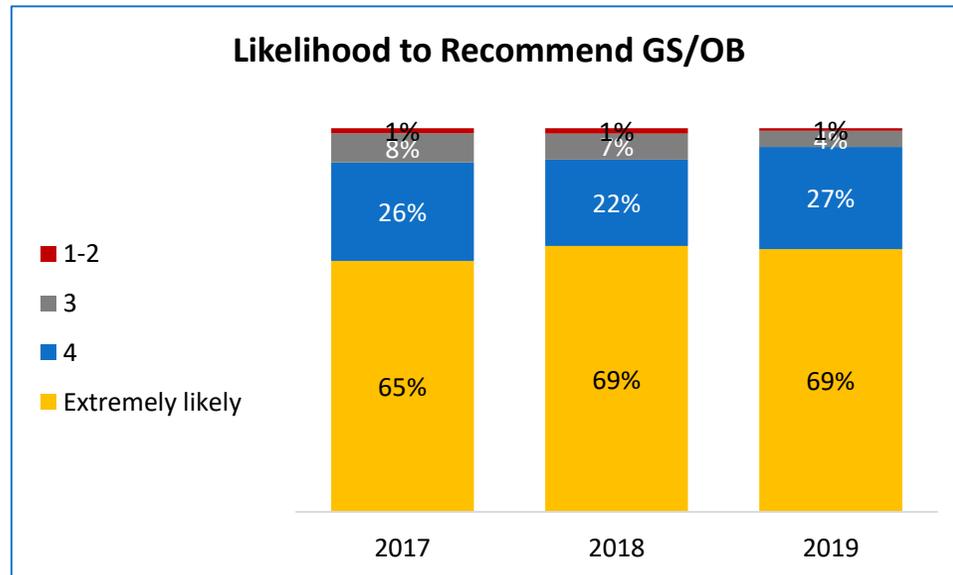
- Ratings of GS/OB by summer visitors remain very positive.
- Weather is the most highly rated element of the GS/OB summer experience.

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.
- Likelihood to recommend among both lodging types has increased this year.



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 %	2019 Top 2 Box %
Vacation rental/condo	90%	94%	95%
Hotel	91%	90%	95%

Condo/vacation rental 2017 n=721; 2018 n=369; 2019 n=200

Hotel/motel 2017 n=145; 2018 n=63; 2019 n=300

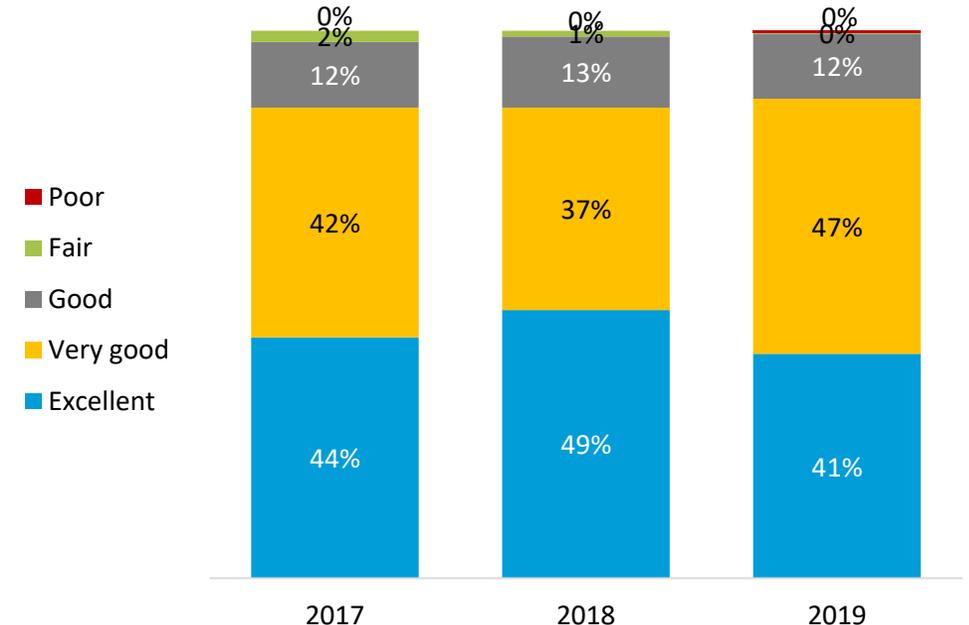
Due to the small sample size of 2018 hotel/motel stayers, these figures are presented as directional indicators.

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

- GSOBT tracks service ratings to gauge whether seasonal staffing challenges are reflected in the satisfaction metric. While nearly half of visitors rate their service as excellent, there is slippage in the measure, similar to what we saw in the spring measure.
- There is minimal negative feedback (poor or fair ratings), but we do see a shift from excellent to very good.
- Comments from those rating the experience “good” include:
 - For price it wasn’t as new as expected
 - Nothing too special about them but they are acceptable
 - A lot of tourists, crowded and long wait time for restaurants
 - Service quality has dropped over the years, it was good but not anything special
 - It was good service just wish they had more places to eat

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

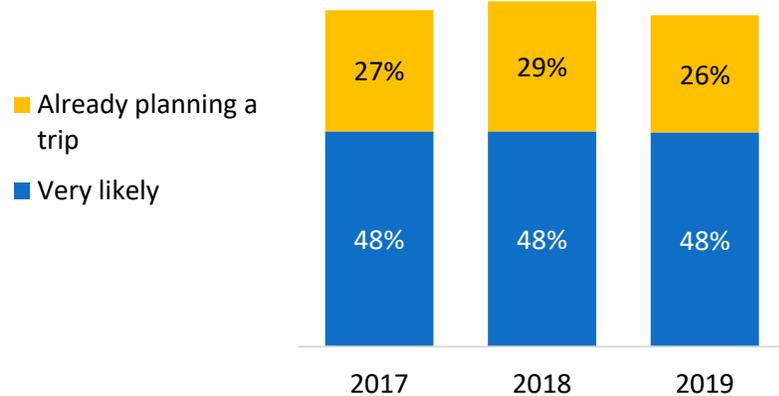


Question text: Overall, how would you rate the quality of the service you received at stores, restaurants, attractions, and lodging establishments in Gulf Shores/Orange Beach? Response options: Poor, fair, good, very good, Excellent

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.
- This summer we see a higher share of those who have always wanted to visit GS/OB among those already planning to return.

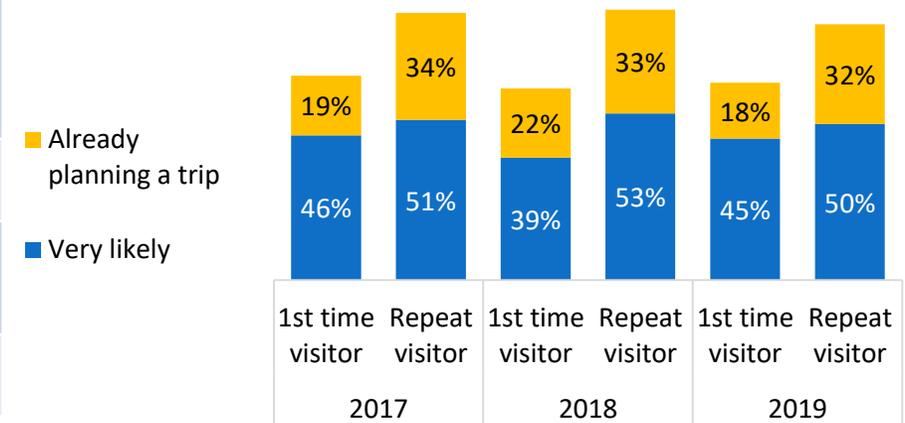
Likely to Return to GS/OB in the Next Year



Of those already planning a return trip to GS/OB:

I've been many times and know it will deliver the vacation I want	50%
I go there every year	34%
I have family and friends there	21%
I've always wanted to go there	19%

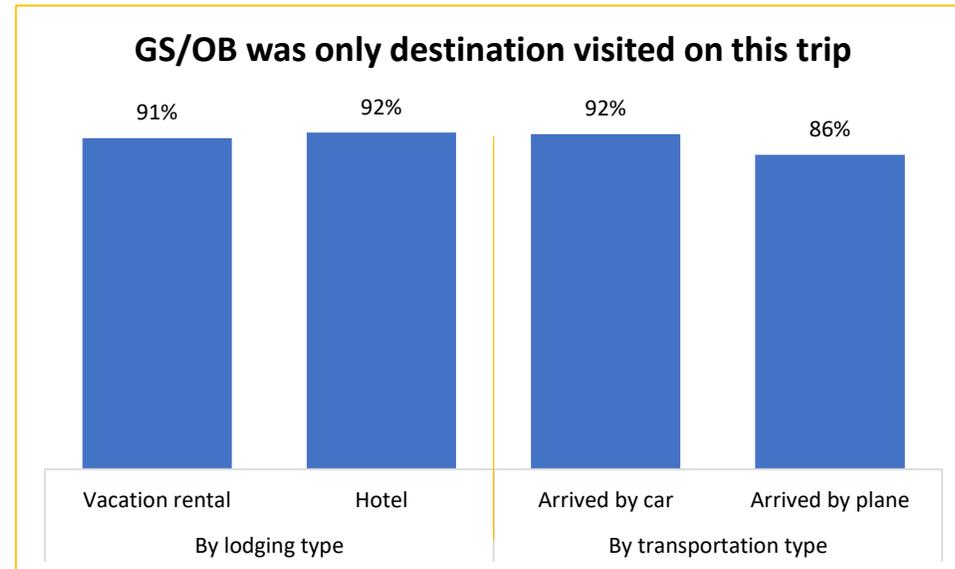
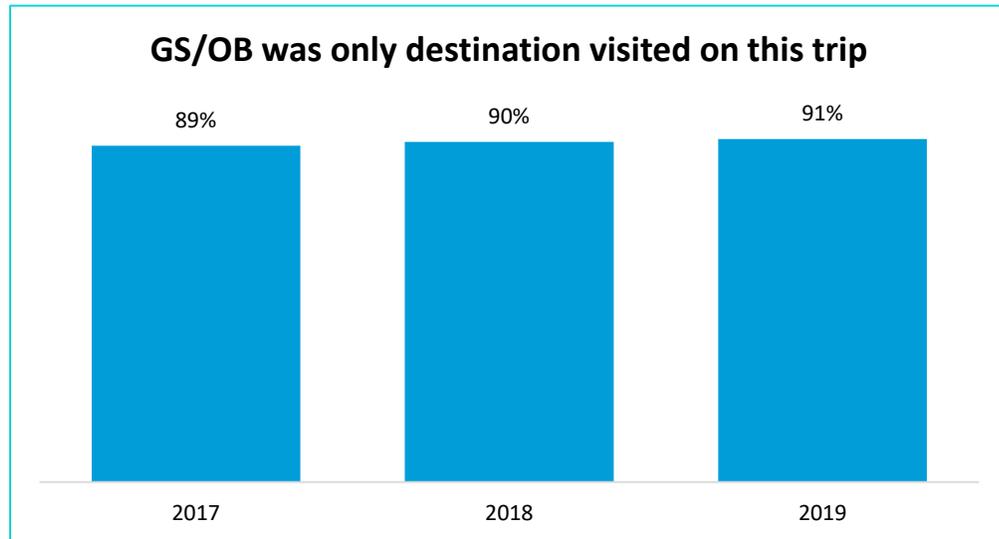
Likelihood to visit GS/OB in the next year



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

Destinations Visited

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





Welcome Center Supplemental Analysis

Visitor Profile Research – Summer 2019

Welcome Center Impact

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

Summer 2019 visits	No Welcome Center	Visited Welcome Center
Length of stay	4.3	4.5
# of activities on trip	6.0	10.4

Impact on Spending

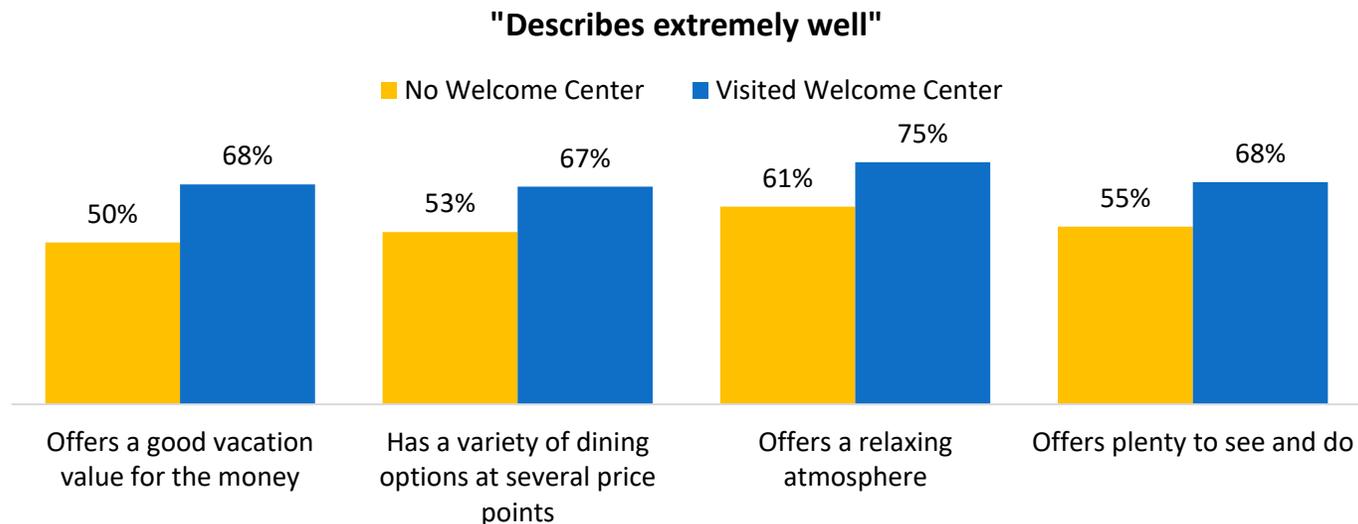
- Welcome Center visitors spent a third more money in the destination on summer trips, particularly on shopping and recreation/entertainment.
- Lodging expenditures are lower among welcome center visitors, which also reflects less familiar visitors who stay for a shorter period of time in the destination.
- Again, this makes sense. While lodging decisions and length of stay are typically decided ahead of time, shopping and entertainment are often not pre-planned when visiting a place for leisure. So Welcome Centers have more opportunity to impact these metrics.

Trip spending	No Welcome Center	Visited Welcome Center
Lodging	\$1,349	\$1,016
Meals/food/groceries	\$428	\$373
Shopping	\$219	\$456
Recreation or entertainment	\$140	\$411
Transportation within Gulf Shores	\$38	\$125
Other	\$43	\$104
Total	\$2,218	\$2,485

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

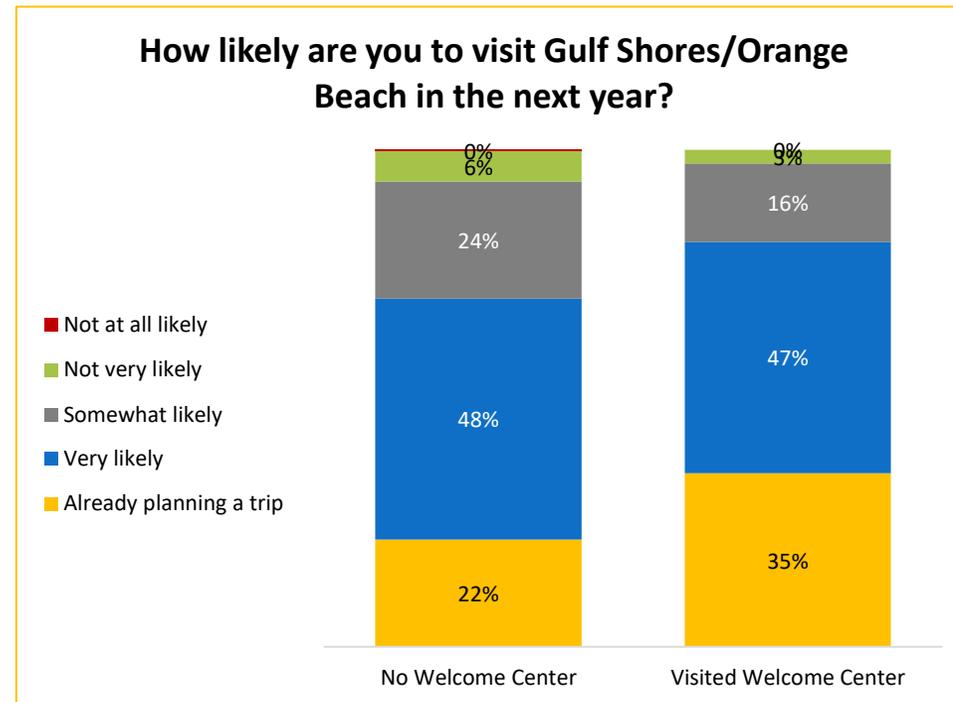
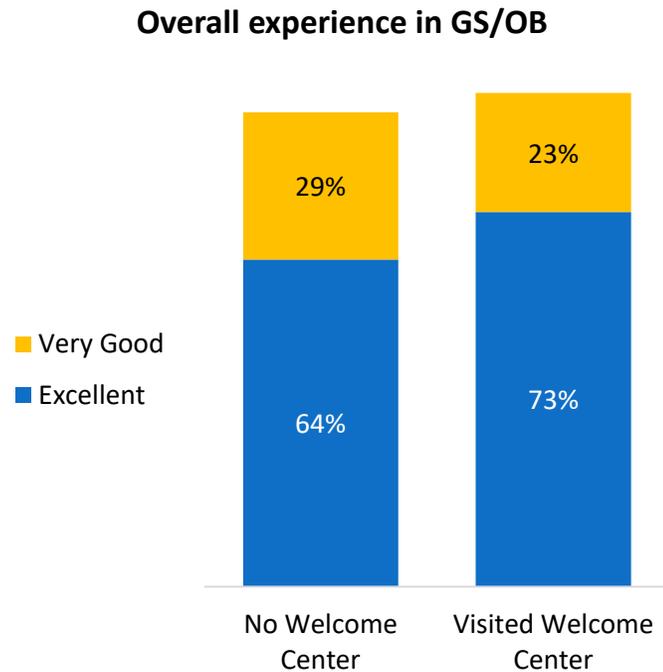
Impact on Image

- Welcome Center visitors have stronger agreement with image statements related to the GS/OB leisure product.
- Summer visitor views of the area's good value, dining options, having plenty to see and do and offering a relaxing atmosphere saw the largest lift from Welcome Center usage.



Impact on Experience and Intent to Return

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





Appendix

Visitor Profile Research – Summer 2019

Comparing Target to Other Travelers

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

Non-target SUMMER Day trips	2017	2018	2019
Average # visits/year	4.1	6.1	3.7
First time trips	34%	38%	36%

2017 day trip n=252; 2018 day trip n=125; 2019 day trip = 125

Comparing Target to Other Travelers

Began planning summer trip	2017		2018		2019	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
< 1 week before trip	4%	26% ^{ad}	4%	28% ^{ad}	3%	47% ^a
1-2 weeks	5%	14% ^a	8%	18% ^a	10%	26% ^a
3 weeks - 1 month	13%	17%	17%	22%	16%	18%
2 - 3 months	34% ^{be}	17%	27% ^b	18%	33% ^b	7%
4-6 months	25% ^{be}	11%	24% ^{be}	6%	22%	0
6+ months	18%	15%	19%	9%	17% ^b	2%

GS/OB is only destination visited on this trip	2017		2018		2019	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
	89% ^{be}	82%	91% ^{be}	77%	91% ^b	83%

2017 target n=891, day trip n=242; 2018 target n=407, day trip n=114; 2019 target n=500 (a), day trip n=125 (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 table above.
Question text: Was Gulf Shores/Orange Beach the only destination you visited on this trip? YES/NO

Comparing Target to Other Travelers

Resources used to plan GS/OB trip	2017		2018		2019	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Family or friends	31%	34%	34%	22%	34%	40%
Social media	13%	12%	8%	15%	19%	24%
Booking websites or apps	15%	15%	10%	12%	22% ^b	8%
Hotel websites	19%	17%	12%	11%	20% ^b	11%
Gulf Shores & Orange Beach Tourism website	21%	11%	16%	10%	26% ^b	6%
Local vacation rental company sites	18%	5%	17%	10%	20% ^b	4%
Travel advice websites or apps	10%	8%	9%	9%	15%	11%
Vacation home rental booking sites/apps	37%	5%	40%	7%	41% ^b	4%
Travel/visitor guide	12%	10%	5%	7%	15% ^b	4%
Traveler review sites or apps	18%	9%	9%	6%	26% ^b	10%
Travel blogs	5%	4%	4%	4%	8%	7%
Alabama's official tourism website	6%	5%	5%	4%	9%	4%
Magazine and newspaper articles	2%	5%	1%	4%	4%	4%

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

2017 target n=891, day trip n=242;
2018 target n=407, day trip n=114;
2019 target n=500 (a), day trip n=125 (b)
a / b indicate statistically significant differences at the 95% level.

Comparing Target to Other Travelers

Children on trip	2017		2018		2019	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
% of trips with children	49%	28%	63%	33%	59%	45%
Of trips with children:	<i>2017 target n=54, day trip n=11; 2018 target n=61, day trip n=6; 2019 target n=295, day trip n=56</i>					
< 6 years old	34%	9%	50%	33%	43%	55%
6-11 years old	59%	45%	62%	50%	48%	52%
12-17 years old	60%	55%	45%	17%	47%	38%

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

Mode of travel to GS/OB	2017		2018		2019	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Automobile	91%	78%	92%	85%	89% ^b	76%
Bus	2%	4%	2%	5%	1%	4%
Airplane	7%	17%	6%	9%	10%	6% ^a
Other	0%	0%	0%	1%	1%	13% ^{*a}

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, day trip n=242; 2018 target n=407, day trip n=114; 2019 target n=500 (a), day trip n=125 (b)
 a / b indicate statistically significant differences at the 95% level.
 * Includes boat

Comparing Target to Other Travelers

	2017		2018		2019	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Travel party size	5.4	3.0	5.0	2.8	4.4 ^b	3.5

Trip spending	2017		2018		2019	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Lodging	\$1,606	\$-	\$1,408	\$ -	\$1,272	\$ -
Meals/food/groceries	\$471	\$194	\$410	\$206	\$415	\$98
Shopping	\$294	\$161	\$266	\$208	\$275	\$171
Recreation or entertainment	\$242	\$112	\$173	\$116	\$203	\$241
Transportation within Gulf Shores	\$64	\$78	\$64	\$79	\$58	\$76
Other	\$65	\$22	\$54	\$64	\$58	\$79
TOTAL	\$2,741	\$672	\$2,375	\$778	\$2,280	\$665
Per person spending	\$508	\$189	\$475	\$240	\$517	\$190

2017 target n=891, day trip n=242; 2018 target n=407, day trip n=114; 2019 target n=500 (a), day trip n=125 (b)
a / b indicate statistically significant differences at the 95% level.

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

Comparing Target to Other Travelers

Demographics		2017		2018		2019	
		Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Gender	Male	24%	32%	29%	31%	29%	35%
	Female	76%	68%	71%	69%	71%	65%
Age	Average	44	46	47	47	45	48
Marital status	Married	71%	62%	73%	59%	68%	61%
	Divorced/Separated	12%	17%	8%	17%	11%	7%
	Widowed	3%	5%	6%	4%	2%	7% ^a
	Single/Never married	14%	17%	14%	20%	19%	25%
HH income	Average	\$120,083	\$80,628	\$124,837	\$85,680	\$116,268	\$101,881

2017 target n=891, day trip n=242; 2018 target n=407, day trip n=114; 2019 target n=500 (a), day trip n=125 (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)

Comparing Target to Other Travelers

Top 2 Box	2017		2018		2019	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Offers a relaxing atmosphere	94%	81%	93%	82%	95%	93%
Is easy to get to by car	90%	75%	93%	77%	92%	86%
Has beautiful beaches	90%	82%	93%	82%	94% ^b	83%
Has a “family-friendly” atmosphere	93%	81%	95%	82%	95% ^b	86%
Is a safe destination	93%	81%	95%	80%	95%	90%
Has a clean, unspoiled environment	83%	70%	89%	75%	89%	86%
Offers plenty to see and do	88%	75%	92%	82%	90%	81%
Has nice weather	93%	81%	93%	81%	96%	92%
Provides warm Southern hospitality	92%	75%	91%	78%	92%	88%
Has a variety of dining options at several price points	88%	74%	93%	78%	92% ^b	81%
Has a variety of lodging options at multiple price points	87%	70%	90%	76%	92% ^b	83%
Has beautiful scenery	90%	80%	93%	79%	95% ^b	85%
Has warm weather	96%	80%	97%	85%	99% ^b	88%
Offers a good vacation value for the money	89%	69%	88%	69%	88%	83%

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, day trip n=242; 2018 target n=407, day trip n=114; 2019 target n=500 (a), day trip n=125 (b)
a / b indicate statistically significant differences at the 95% level.

Comparing Target to Other Travelers

Overall experience	2017		2018		2019	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Top 2 Box Rating	88%	68%	89%	70%	91%	85%
5 (Excellent)	50%	35%	56%	40%	48%	46%
4 (Very good)	38%	33%	34%	30%	43%	39%
3 (Good)	10%	28%	10%	23%	7%	15% ^a
2 (Fair)	1%	3%	0%	6%	1%	0%
1 (Poor)	1%	1%	0%	1%	0%	0%

Likelihood to recommend	2017		2018		2019	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Top 2 Box Rating	91%	79%	92%	82%	95%	85%
5 (Extremely likely)	65%	50%	69%	61%	69% ^b	53%
4	26%	28%	22%	21%	26%	32%
3	8%	17%	7%	16%	4%	12% ^a
2	1%	3%	1%	2%	0%	3% ^a
1 (Not at all likely)	0%	2%	0%	1%	0%	0%

2017 target n=891, day trip n=242; 2018 target n=407, day trip n=114; 2019 target n=500 (a), day trip n=125 (b)
a / b indicate statistically significant differences at the 95% level.

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

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

Comparing Target to Other Travelers

Likelihood to visit again in the next year	2017		2018		2019	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Likely to return (top 2 box)	74%	66%	77%	67%	74%	69%
5 (Already planning a trip)	27%	17%	29%	25%	26%	20%
4 (Very likely)	48%	49%	48%	42%	48%	48%
3 (Somewhat likely)	20%	25%	19%	27%	21%	24%
2 (Not very likely)	4%	5%	3%	4%	5%	7%
1 (Not at all likely)	1%	4%	2%	3%	0%	0%

During which season(s) would you be most likely to visit (of those likely to visit)	2017		2018		2019	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Spring	24%	26%	29%	36%	28%	44%
Summer	80%	72%	76%	66%	79%	69% ^a
Fall	25%	26%	24%	28%	24%	36%
Winter	6%	7%	7%	13%	6%	22% ^a

2017 target n=891, day trip n=242; 2018 target n=407, day trip n=114; 2019 target n=500 (a), day trip n=125 (b)

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

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

Comparing Target to Other Travelers

Top states of origin	2017		2018		2019	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Louisiana	17%	6%	20%	8%	14%	17%
Texas	12%	16%	9%	10%	13%	10%
Florida	7%	18%	7%	18%	12%	32% ^a
Alabama	17%	17%	21%	21%	11%	12%
Tennessee	6%	5%	8%	6%	10%	3%
Georgia	9%	7%	10%	12%	8%	8%
Illinois	2%	3%	0%	2%	8%	5%
Missouri	4%	1%	1%	3%	7%	2%
Mississippi	6%	8%	7%	6%	4%	10%
Indiana	4%	2%	4%	4%	4%	0%
Michigan	1%	2%	0%	0%	4%	0%
Arkansas	6%	1%	8%	2%	2%	0%
Kentucky	2%	2%	2%	2%	2%	0%
Wisconsin	1%	1%	1%	3%	1%	0%
Oklahoma	2%	3%	3%	3%	0%	0%
Ohio	3%	5%	0%	1%	0%	0%

2017 target n=891, day trip n=242; 2018 target n=407, day trip n=114; 2019 target n=500 (a), day trip n=125 (b). a / b indicate statistically significant differences at the 95% level.

Comparing Non-Target Trips Year-Over-Year

General activities (non-target trips)	2017		2018		2019	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Beaches	82%	48%	80%	44%	81% ^b	49%
Dining out	64%	35%	62%	33%	67% ^b	43%
Swimming	64%	29%	59%	28%	58% ^b	20%
Relaxing	63%	40%	58%	39%	65% ^b	25%
Shopping	55%	36%	46%	25%	54% ^b	18%
Sightseeing	28%	34%	30%	26%	37% ^b	18%
Shelling	17%	10%	19%	4%	19% ^b	6%
Exercise/working out	14%	5%	15%	9%	15% ^b	3%
Fishing	13%	9%	14%	14%	14%	8%
Photography	12%	12%	13%	9%	12%	11%
Boating or sailing	11%	7%	12%	5%	11%	10%
Watching wildlife	8%	9%	11%	4%	16% ^b	4%
Visiting friends/relatives who live in the area	7%	11%	11%	11%	12%	8%
Family/friends reunion	7%	11%	10%	11%	8%	4%
Dolphin tour	11%	7%	10%	4%	14%	9%
Bicycle riding	5%	3%	6%	4%	7%	3%
Parasailing/jet skiing	9% ^b	3%	6%	3%	6% ^b	1%
Historical sites	8%	12%	6%	11%	13% ^b	6%
Visiting a spa	5%	5%	5%	4%	8%	4%
Scuba diving/snorkeling	5%	4%	5%	6%	5%	2%
Sporting events	4%	5%	5%	3%	3%	3%
Golfing	6%	5%	5%	4%	10% ^b	2%
Kayaking/canoeing/paddle boarding	7%	4%	5%	3%	8% ^b	2%
Tennis	3%	1%	3%	3%	6% ^b	1%
Hiking on trails	6%	5%	3%	6%	12% ^b	4%
Birdwatching	4%	4%	3%	4%	9% ^b	1%
Concerts and nightlife	7%	2%	2%	1%	9%	7%
Festivals or special events (non-sports events)	4%	5%	1%	1%	7%	4%

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

2017 target n=891, day trip n=242; 2018 target n=407, day trip n=114; 2019 target n=500 (a), day trip n=125 (b)
a / b indicate statistically significant differences at the 95% level.

Comparing Non-Target Trips Year-Over-Year

Specific attractions (non-target trips)	2017		2018		2019	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Adventure Island	11%	5%	12%	1%	15% ^b	3%
Alabama Gulf Coast Zoo	9%	4%	5%	2%	13%	8%
Alabama's Coastal Connection Scenic Byway	8%	3%	5%	2%	14% ^b	4%
Battleship USS Alabama	10%	6%	5%	2%	12%	6%
Bellingrath Gardens	2%	2%	2%	2%	3%	4%
Bon Secour National Wildlife Refuge	3%	2%	1%	0%	5%	4%
Dauphin Island	10%	5%	6%	6%	13% ^b	5%
Fort Morgan Historic Site	9%	2%	3%	2%	12% ^b	4%
Gulf State Park	11%	10%	11%	6%	13% ^b	4%
Hugh S. Branyon Backcountry Trail	2%	0%	0%	1%	3%	1%
National Naval Aviation Museum	6%	2%	1%	4%	8%	4%
OWA Park	1%	2%	2%	1%	4%	4%
Tanger Outlets	30%	12%	30%	9%	32% ^b	16%
The Track	10%	2%	9%	3%	12% ^b	3%
The Wharf	23%	5%	18%	6%	28% ^b	9%
Waterville	8% ^b	2%	7%	6%	7%	4%

2017 target n=891, day trip n=242; 2018 target n=407, day trip n=114; 2019 target n=500 (a), day trip n=125 (b)

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

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