



**GULF SHORES &
ORANGE BEACH
TOURISM**

Alabama's White-Sand Beaches

Visitor Profile Research

Fall 2019

Strategic Marketing & Research Insights LLC

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Introduction

Visitor Profile Research – Fall 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 third of four seasonal reports for 2019.

Research Objectives



Gather information on fall visitors, determining visitor origins and demographics



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



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



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



Compare data gathered from recent travelers to those who came to the area in 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 fall 2019 (September through November).
- Potential respondents were screened to ensure they were travelers to the Gulf Shores/Orange Beach area and were at least 25 years of age.
- Travelers were asked about multiple trips.
- Target data is weighted to match the destination’s actual occupancy rates (hotel and vacation rental) over the relevant time period, which 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 fall months. More detail is included on the following slides.

Number of trips represented in the data	Fall 2019
Target trips (stayed 1-30 nights in paid accommodations)	437
Non-target trips (visited but did not stay overnight)	100

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 177,946 unique non-resident devices that entered the defined GS/OB area during fall 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 fall 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 makes 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.

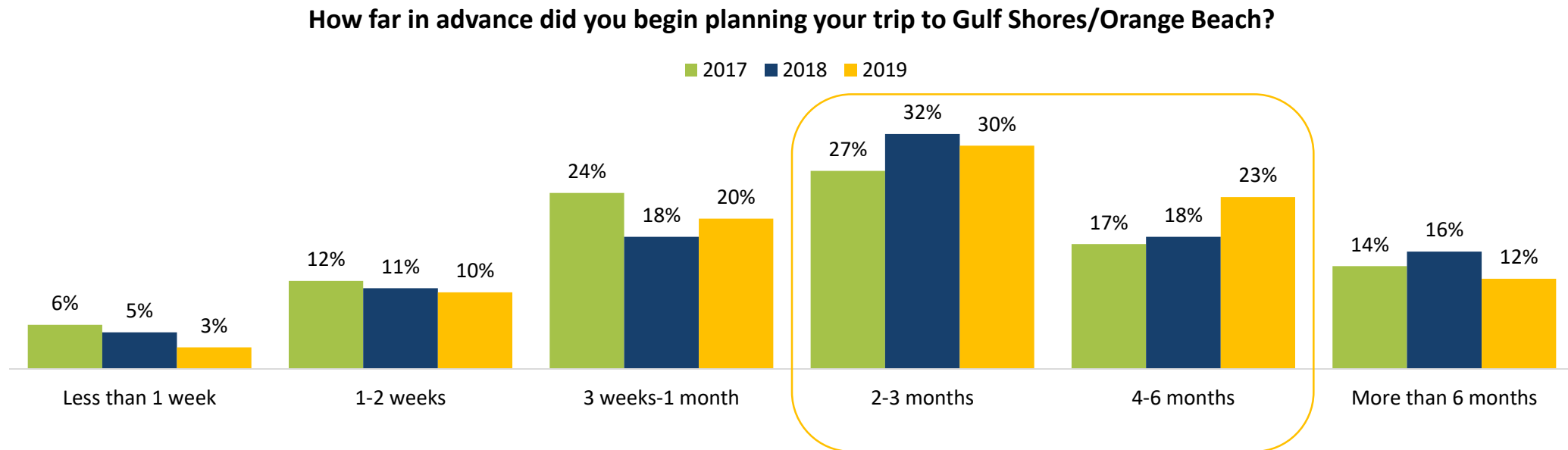


Detailed Findings

Visitor Profile Research – Fall 2019

Travel Planning

- Half of fall trips are planned 2 to 6 months in advance, with a shift toward slightly longer travel planning horizons.

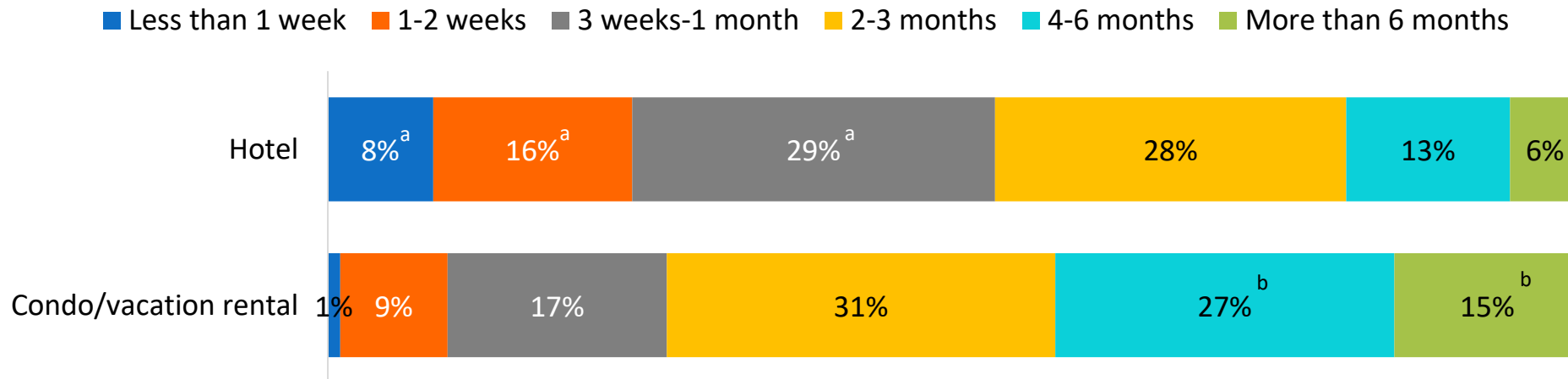


Question text: How far in advance did you begin planning your trip to Gulf Shores/Orange Beach? Response options as shown in graph above.

Travel Planning – Hotel vs. Condo Rental

- Hotel stayers take less time to plan their GS/OB stays than vacation renters, as we see in each season.

Fall Trip Planning Horizon by Lodging Type

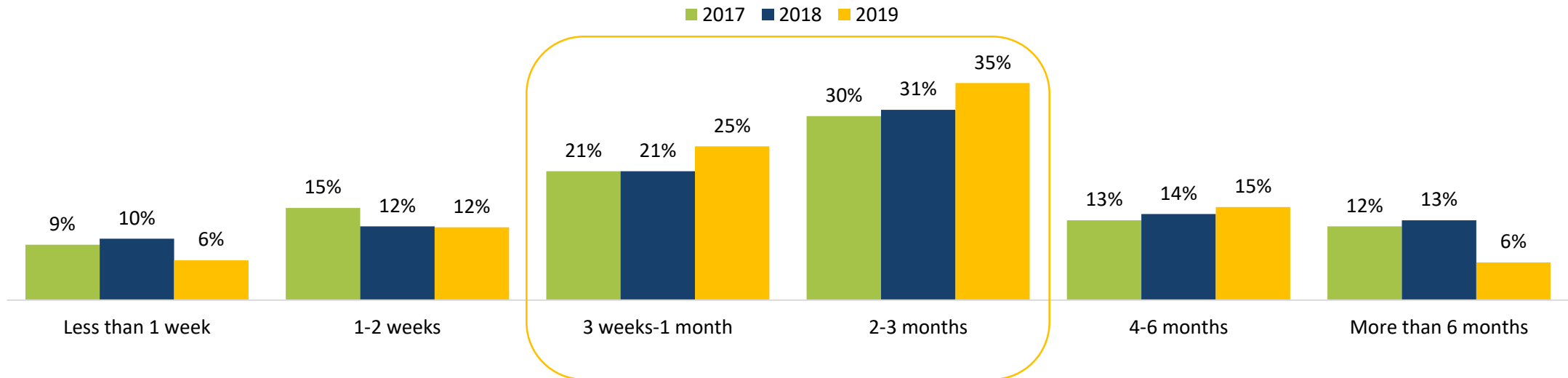


Vacation rental/condo n=206 (a); Hotel/motel n=231 (b); a / b indicate statistically significant differences at the 95% level.
Question text: How far in advance did you begin planning your trip to Gulf Shores/Orange Beach? Response options as shown in graph above.

Travel Planning

- While we are seeing a shift toward longer planning horizons with half of trips planned 2 to 6 months in advance, 6 in 10 lodging bookings occur between 3 weeks and 3 months of travel. For fall visitors, the availability of lodging and/or shoulder season lodging deals could be what kicks off their trip planning.

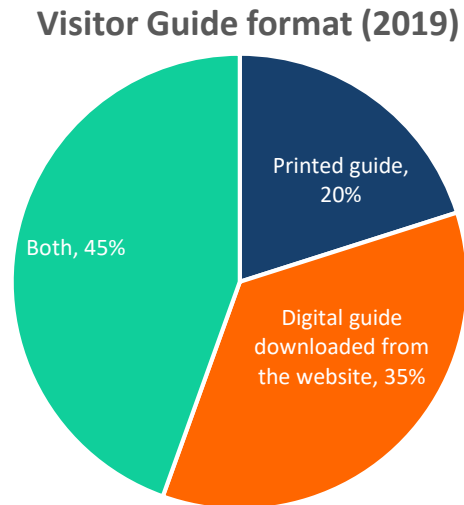
How far in advance did you book your lodging in Gulf Shores/Orange Beach?



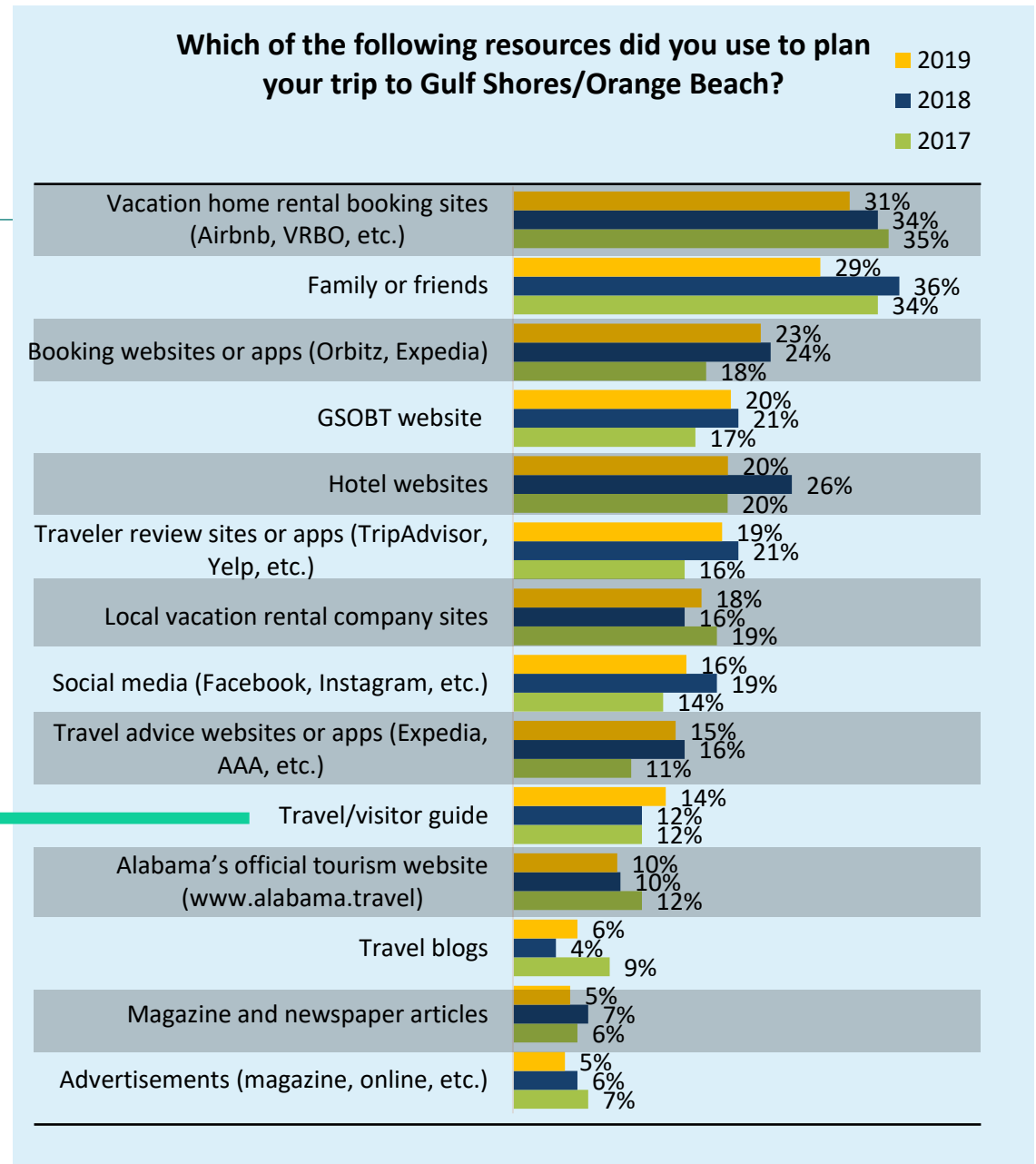
Question text: How far in advance did you book your lodging in Gulf Shores/Orange Beach? Response options as shown in graph above.

Travel Planning

- The top fall visit planning resources remain vacation home rental sites and family/friends, although there is a general trend toward fewer resources being used overall.
- A fifth of fall visitors used the GSOBT website to help plan their trip.
- Visitor Guide usage skewed toward the digital version.

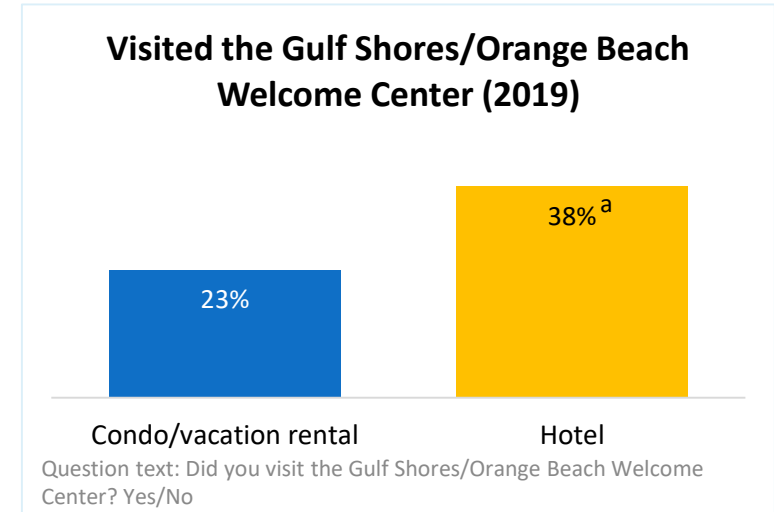


Question text: Which of the following resources did you use to plan your trip to Gulf Shores/Orange Beach? Response options as shown in table.

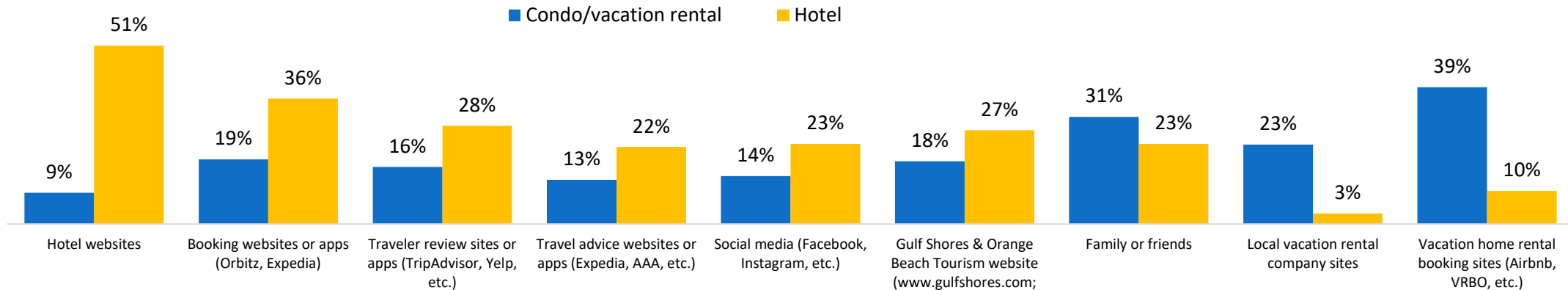


Travel Planning – Hotel vs. Condo Rental

- Hotel stayers use the welcome centers at a higher rate – an expected behavior among first-time visitors, which hotel stayers are more likely than condo stayers to be.
- Hotel stayers also use the GSOBT website, traveler review sites, and social media more. These may be good channels to post invitations to the Welcome Center to reach newer visitors.



Trip planning resources with biggest difference by lodging type

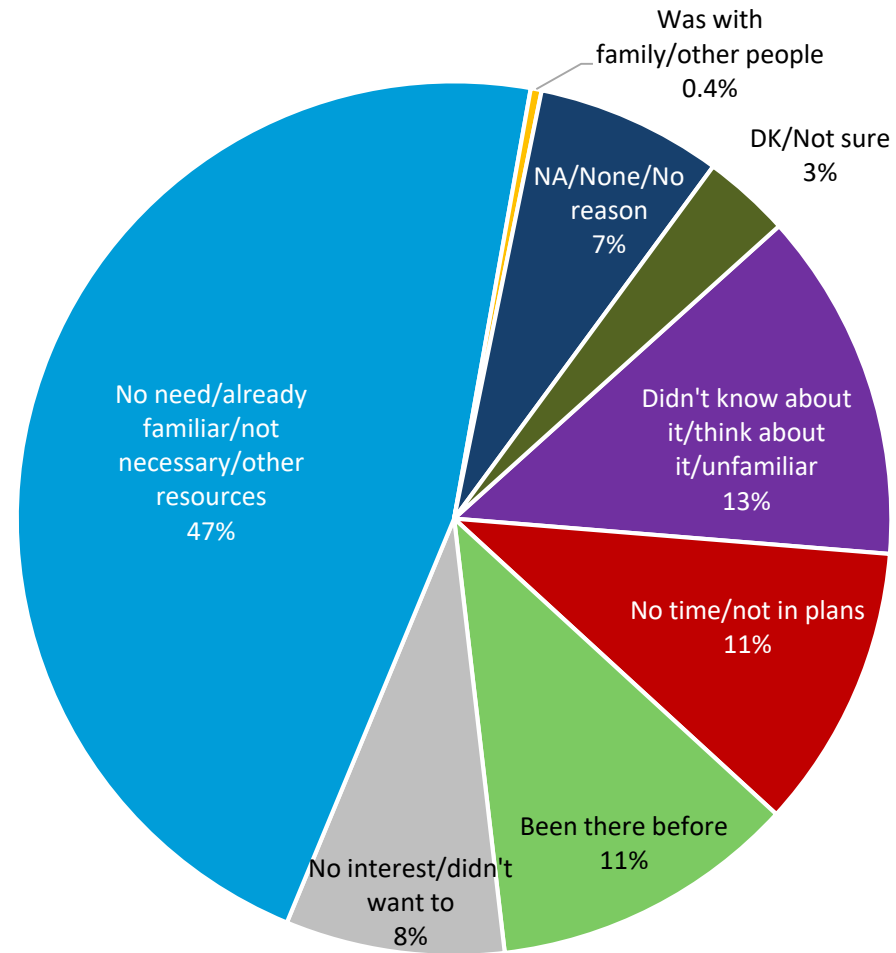


Vacation rental/condo n=206 (a); Hotel/motel n=231 (b); a / b indicate statistically significant differences at the 95% level.
 Question text: Which of the following resources did you use to plan your trip to Gulf Shores/Orange Beach? ? Response options as shown in graph above.

Travel Planning

- Of those who did not visit a welcome center, nearly half say it is because they are already familiar with the destination.
- Because Welcome Center visitation is associated with more positive views of the destination and higher likelihood to return, there is value in incentivizing new visitors in particular to stop into the Welcome Centers.

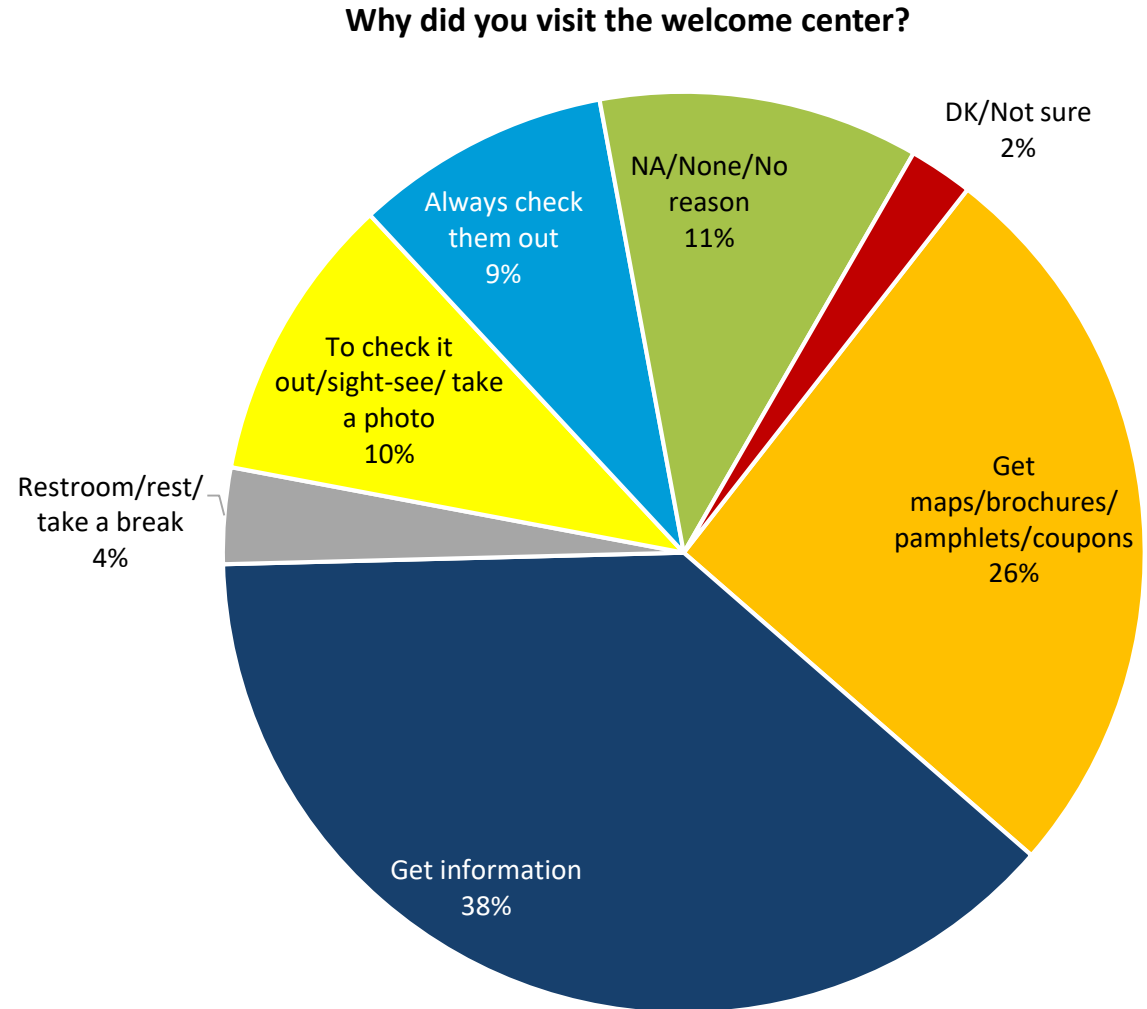
Why didn't you visit the welcome center?



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

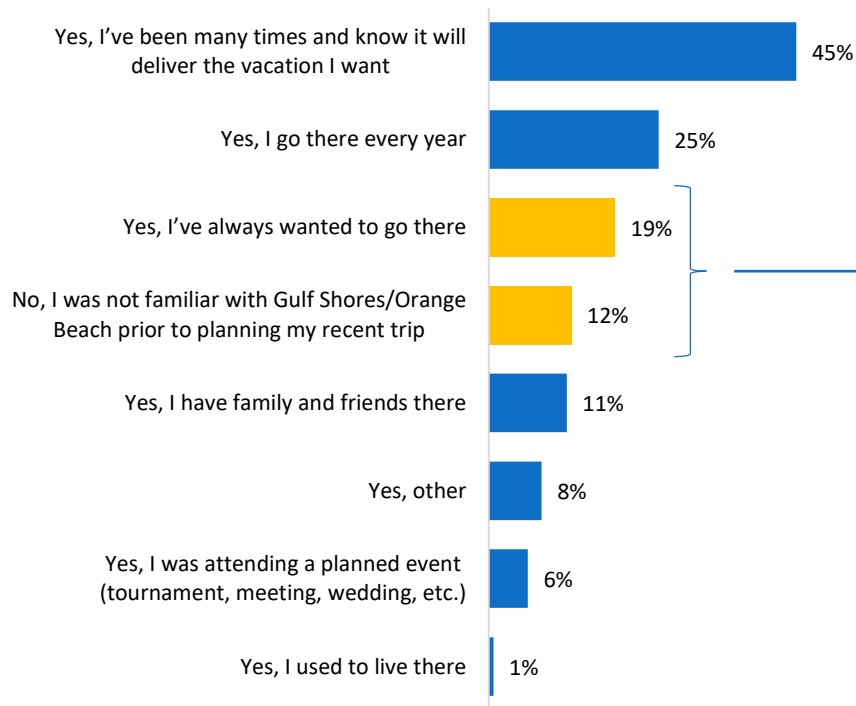
Travel Planning – Welcome Center Visitors

- As we saw in summer, more than a third of fall visitors who stopped at the visitor center did so to get information.
- A quarter of fall Welcome Center visitors went there to get information in a specific format – map, coupon, etc.

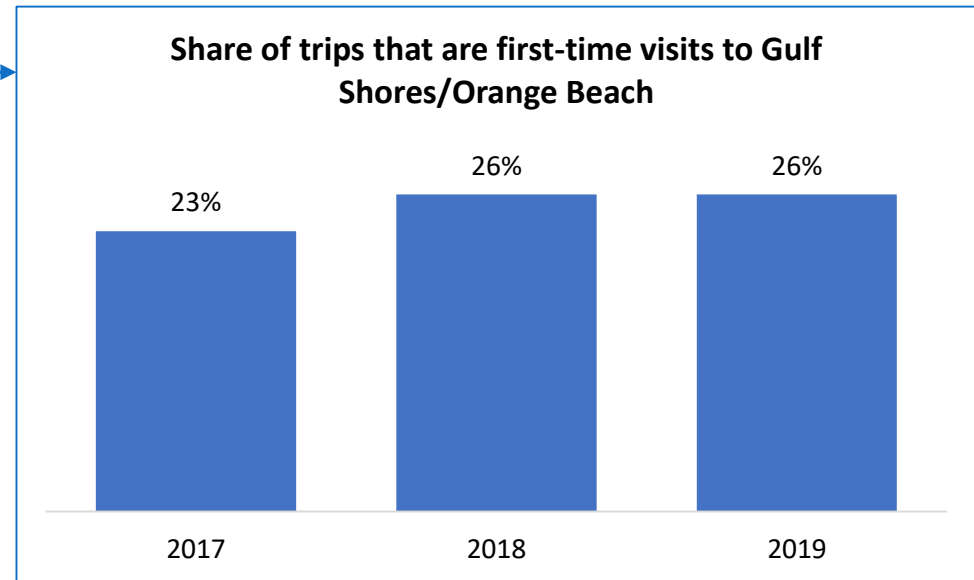


Trip Characteristics

Prior to this visit, was Gulf Shores/ Orange Beach familiar to you? (2019)



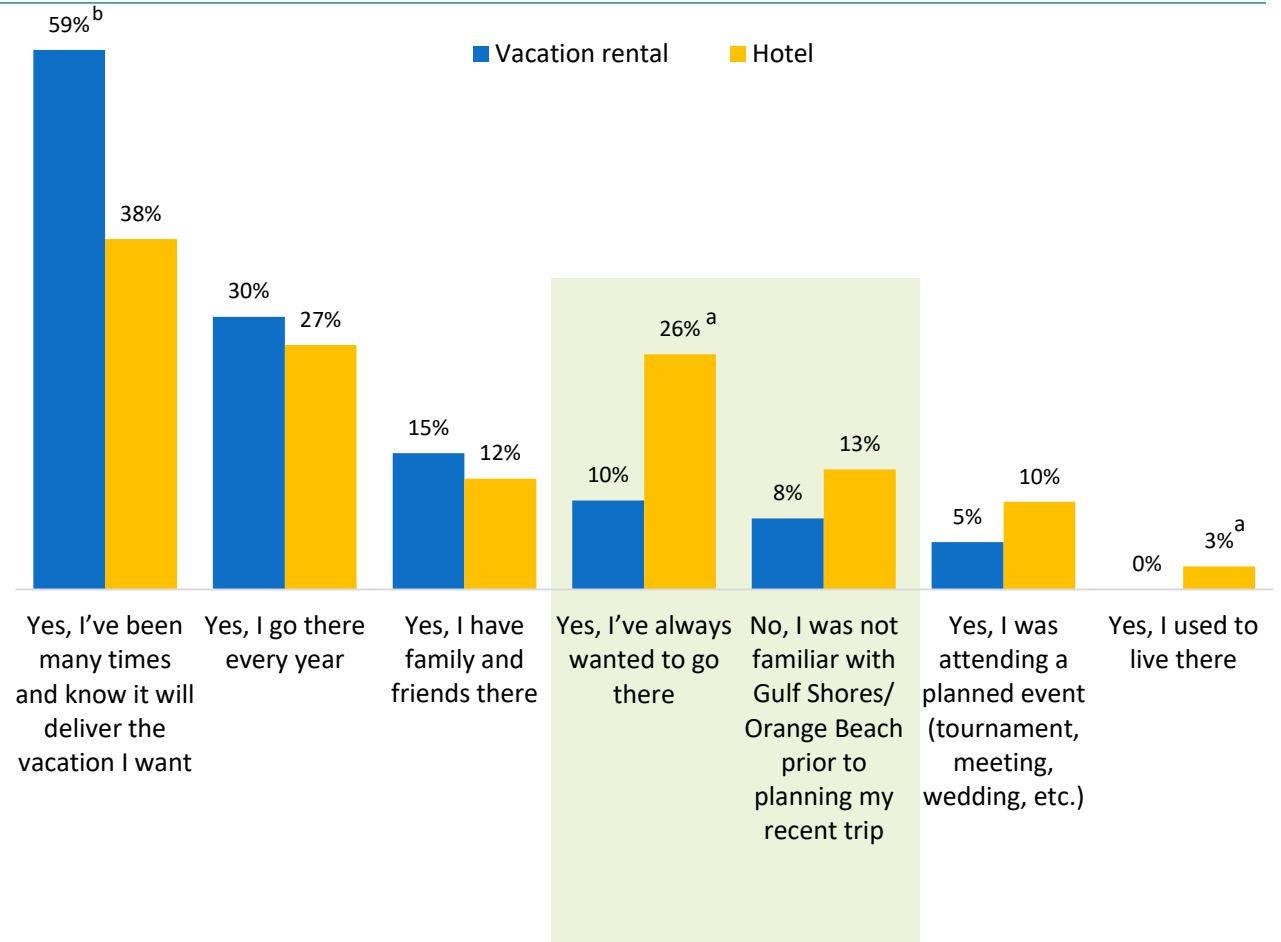
- First-time visitation in fall remains at about a quarter of visitors.
- A higher share of fall visitors than summer say they come every year.



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

Vacation renters are repeat visitors. Hotel stayers tend to be aspirational new visitors.

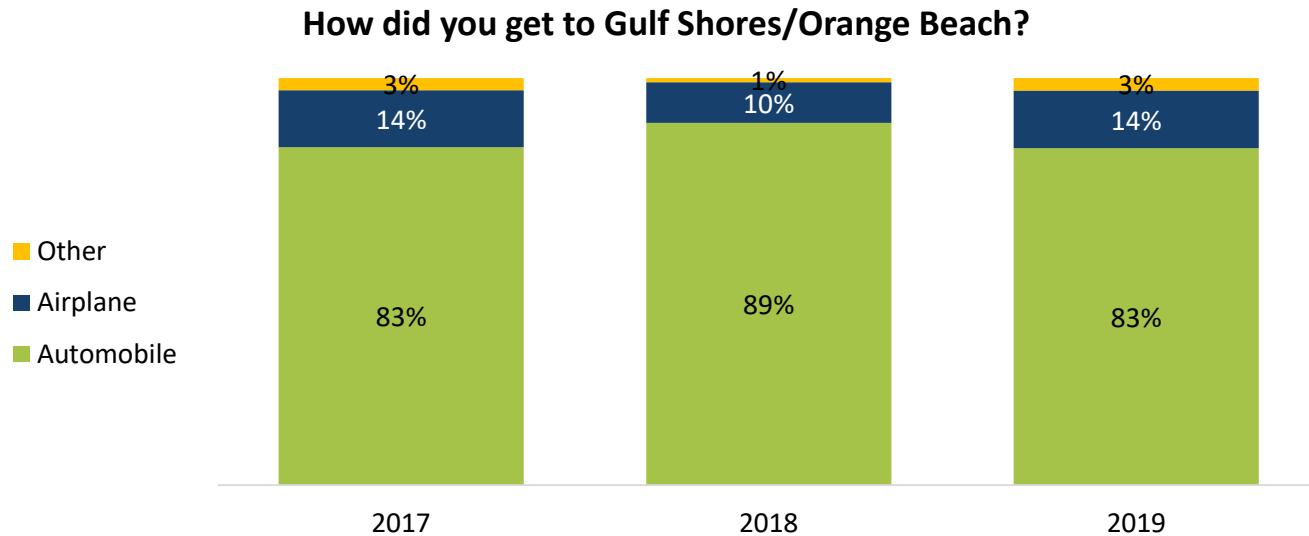
Differences in Reasons for Familiarity



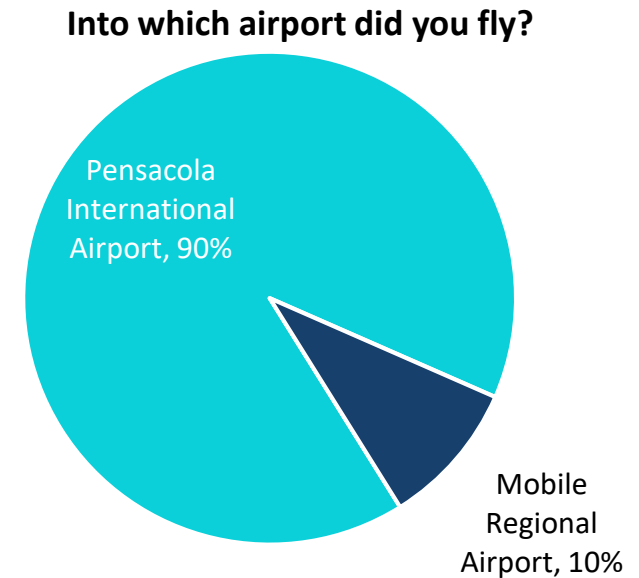
Vacation rental/condo n=206 (a); Hotel/motel n=231 (b); a / b indicate statistically significant differences at the 95% level. Question text: Prior to your visit, was Gulf Shores/Orange Beach familiar to you? Response options as shown in graph above.

Trip Characteristics

- Most fall visitors drive to GS/OB. Nearly half of those who flew came from Houston, Atlanta, and Detroit.
- Few fall visitors fly. Of those who do, 9 in 10 fly into Pensacola.



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



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

Trip Characteristics

- Most fall visits include the beach, but these visits are not as singularly focused on outdoor leisure as summer trips. Rather, fall visits are as likely to involve dining out and relaxing.

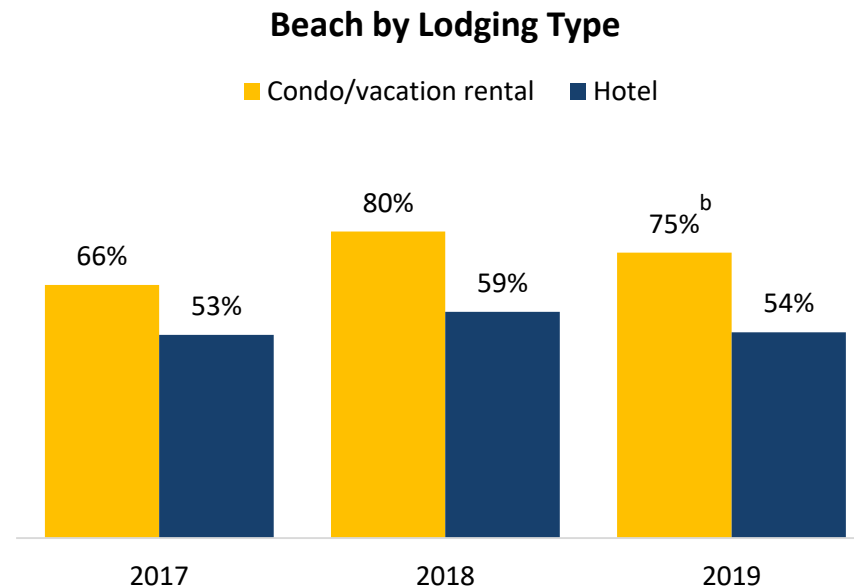
Fall trip participation	2017	2018	2019
Beaches	63%	74%	69%
Dining out	59%	66%	67%
Relaxing	56%	63%	66%
Shopping	49%	57%	47%
Swimming	48%	45%	37%
Tanger Outlets	26%	30%	29%
Sightseeing	29%	34%	29%
Gulf State Park	16%	17%	20%
The Wharf	14%	17%	18%
Shelling	16%	15%	16%
Watching wildlife	14%	16%	15%
Historical sites	12%	12%	13%
Fort Morgan Historic Site	9%	7%	13%
Visiting friends/relatives in the area	8%	10%	13%
Concerts and nightlife	13%	10%	11%
Dauphin Island	13%	11%	11%
Dolphin tour	10%	10%	11%
Photography	11%	15%	11%
Exercise/Working out	14%	10%	11%
Festivals or special events	7%	9%	10%
Battleship USS Alabama	7%	8%	10%
Golfing	8%	6%	9%
Adventure Island	8%	9%	9%
Fishing	19%	15%	8%
Alabama's Coastal Connection Scenic Byway	9%	10%	8%
National Naval Aviation Museum	4%	6%	8%

Cont'd.	2017	2018	2019
Alabama Gulf Coast Zoo	10%	9%	8%
Hiking on trails	9%	9%	8%
Kayaking/Canoeing/ Paddle boarding	10%	6%	7%
Family/friends reunion	13%	11%	7%
Sporting events	4%	6%	6%
Boating or sailing	8%	9%	6%
Bon Secour National Wildlife Refuge	5%	5%	6%
Visiting a spa	9%	6%	6%
Bicycle riding	5%	7%	5%
Birdwatching	6%	8%	5%
Waterville	3%	3%	5%
The Track	10%	8%	5%
Parasailing/Jet skiing	6%	5%	4%
Scuba diving/Snorkeling	3%	6%	4%
Bellingrath Gardens	5%	3%	4%
OWA Park	2%	4%	3%
Hugh S. Branyon Backcountry Trail	6%	3%	2%
Tennis	5%	2%	2%

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

Trip Characteristics

- Vacation rental visits continue to feature beach visits at a higher rate than hotel visits.



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=206 (a); Hotel/motel 2019 n=231 (b)
a / b indicate statistically significant differences at the 95% level.

Trip Characteristics

- Roughly six in 10 fall visitors chose Gulf Shores/Orange Beach because of the beach.
- Other top motivators of fall visits are relaxation and dining out, in which there has been a lift, potentially due to inventory with new restaurants opening and expansion of existing eateries to new locations.

Fall trip motivators	2017	2018	2019
Beaches	53%	58%	61%
Relaxing	38%	43%	42%
Dining out	20%	23%	31%
Shopping	13%	13%	16%
Swimming	18%	15%	13%
Tanger Outlets	9%	12%	10%
Visiting friends/relatives in the area	6%	7%	8%
Sightseeing	9%	10%	8%
Historical sites	2%	1%	7%
Gulf State Park	2%	2%	7%

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

Trip Characteristics

- Fall trip spending is down among both lodging types.

Average Travel Party Expenditures per Trip – FALL	2017		2018		2019	
	Spending	% of total	Spending	% of total	Spending	% of total
Lodging	\$802	46%	\$892	46%	\$812	50%
Meals/food/groceries	\$381	22%	\$397	21%	\$333	20%
Shopping	\$259	15%	\$347	18%	\$260	16%
Recreation or entertainment	\$175	10%	\$184	10%	\$143	9%
Transportation within Gulf Shores	\$70	4%	\$74	4%	\$53	3%
Other	\$43	2%	\$36	2%	\$37	2%
TOTAL	\$1,729		\$1,930		\$1,638	

2017 n=383; 2018 n=397; 2019 n=437

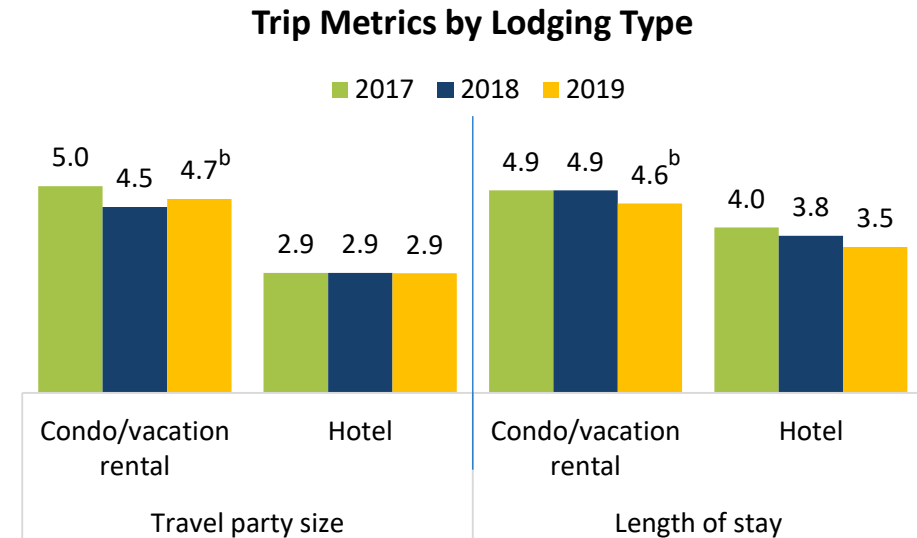
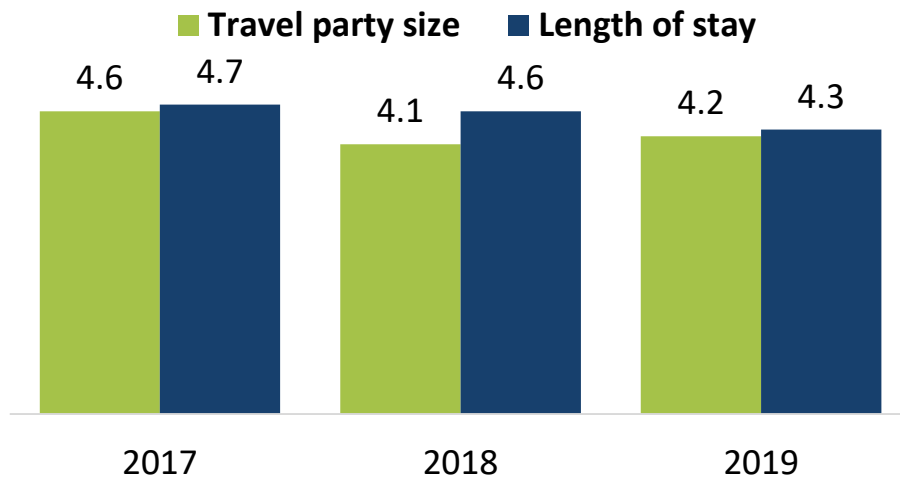
Average Travel Party Expenditures per Trip – FALL	2017		2018		2019	
	Vacation rental	Hotel	Vacation rental	Hotel	Vacation rental (a)	Hotel (b)
Lodging	\$886	\$475	\$1,023	\$558	\$924 ^b	\$493
Meals/food/groceries	\$405	\$288	\$426	\$322	\$350 ^b	\$282
Shopping	\$261	\$251	\$305	\$455	\$262	\$252
Recreation or entertainment	\$174	\$179	\$181	\$193	\$131	\$177
Transportation within Gulf Shores	\$63	\$96	\$71	\$82	\$40	\$91 ^a
Other	\$38	\$64	\$36	\$37	\$33	\$51
TOTAL	\$1,826	\$1,354	\$2,041	\$1,647	\$1,740	\$1,345

Condo/vacation rental 2017 n=118; 2018 n=162; 2019 n=206
 Hotel/motel 2017 n=265; 2018 n=235; 2019 n=231

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 fairly level for fall trips. Hotel stayers visit with fewer people.
- Length of stay among fall visitors appears to be in decline among both lodging types, and this helps explain lower trip spending.



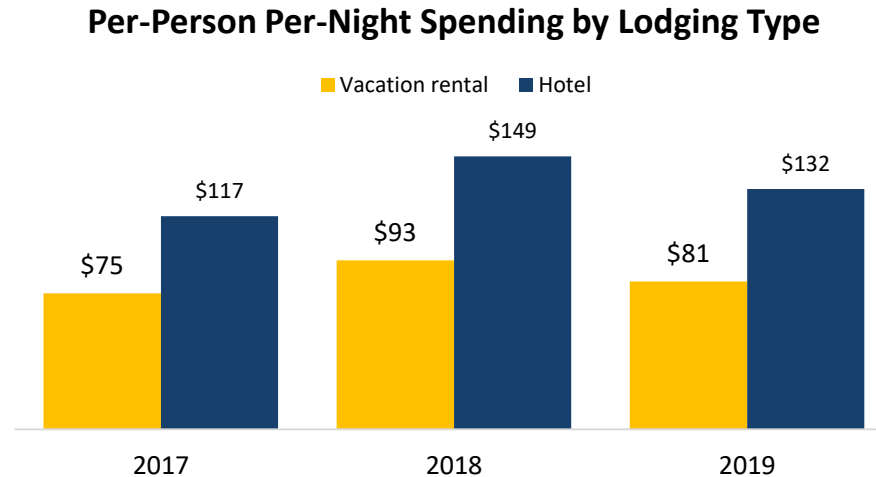
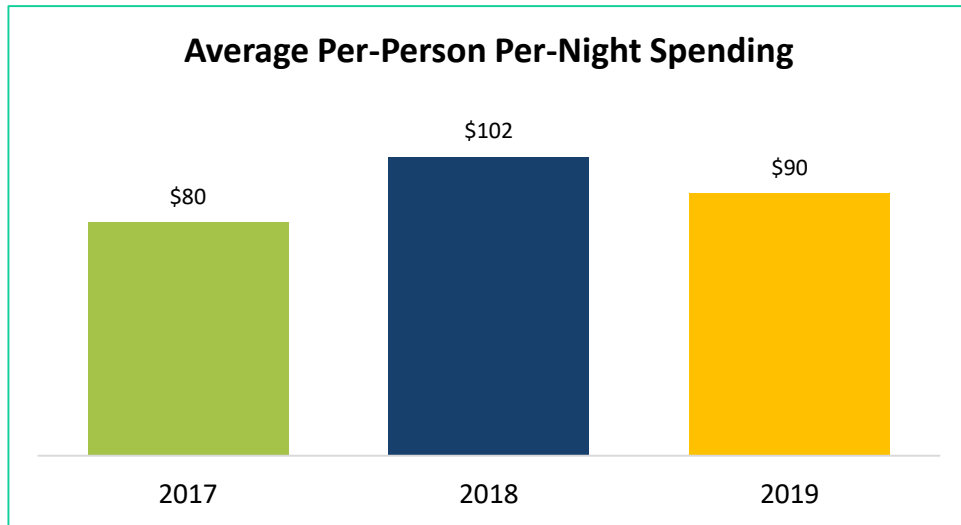
Condo/vacation rental 2017 n=118; 2018 n=162; 2019 n=206 (a)

Hotel/motel 2017 n=265; 2018 n=235; 2019 n=231 (b)

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.

Trip Characteristics

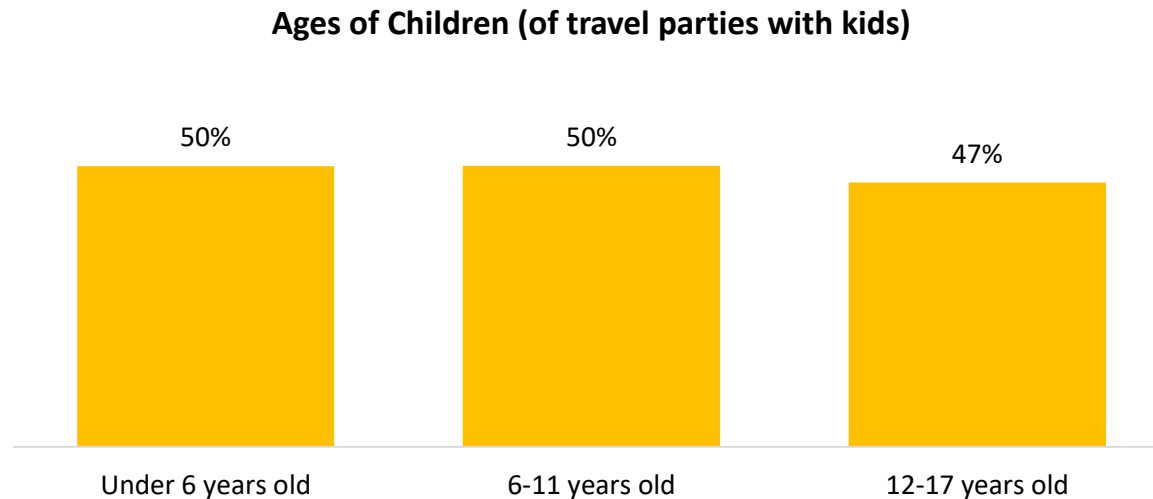
- Hotel spending consistently brings per-person per-night trip expenditures up. The per-person efficiency of vacation rentals is one of the appeals for larger groups and longer stays.



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=118; 2018 n=162; 2019 n=206
Hotel/motel 2017 n=265; 2018 n=235; 2019 n=231

Travel Party Characteristics

- 44% of fall travel parties include children. This is similar to spring, and lower than in summer, when nearly 6 in 10 travel parties included kids.
- While spring trips tend to see more younger kids, summer and fall visits 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.
- The summer trend toward a slight increase in age and in household income is seen in fall trips as well.

Year-over-Year Demographic Profile		2017	2018	2019
Fall visitors				
Age	Average	46	48	49
Marital status	Married	72%	72%	72%
	Divorced/Separated	8%	9%	9%
	Single/Never married	16%	16%	15%
	Widowed	4%	3%	5%
HH income	Average	\$110,200	\$119,571	\$129,417

2017 n=383; 2018 n=397; 2019 n=437

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)

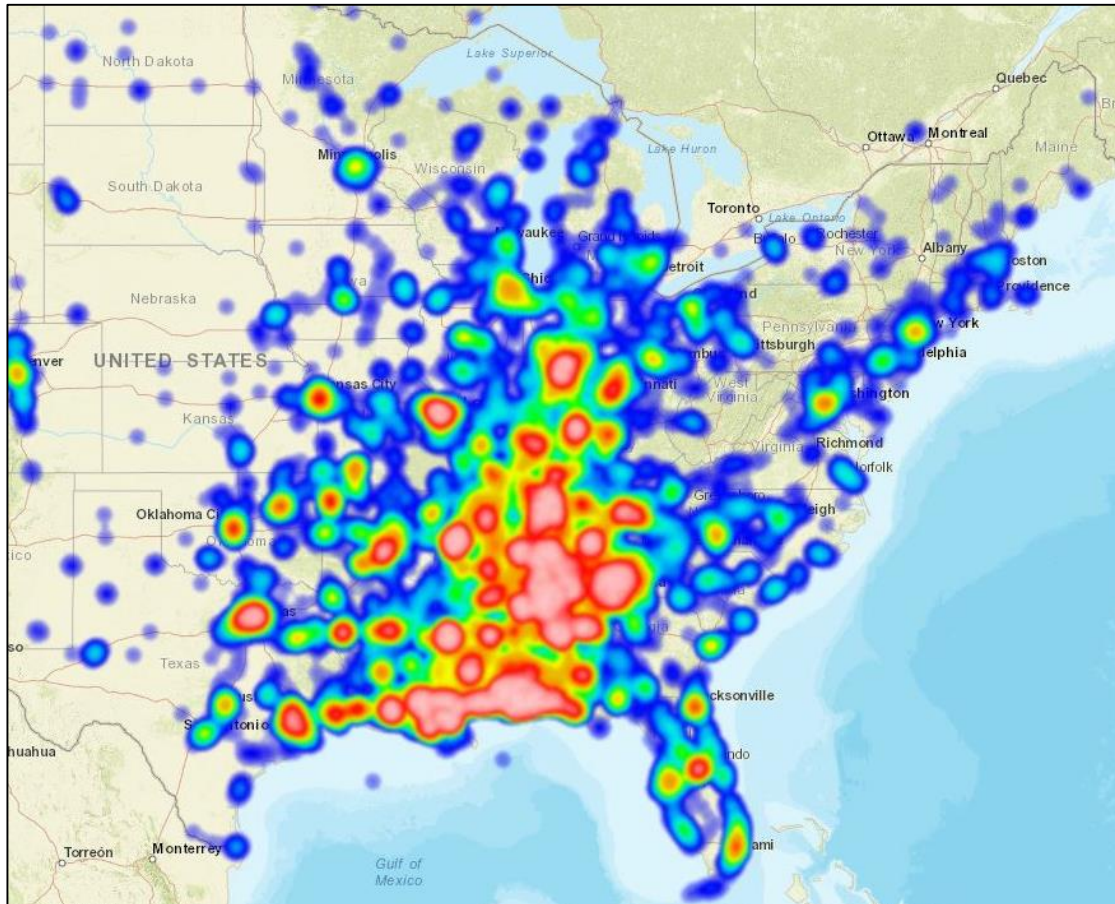
Travel Party Characteristics

- The increase in age is due primarily to vacation renters, while both lodging types have higher incomes this fall than in prior measures.

Fall demographic profile by lodging type		2017		2018		2019	
		Vacation rental/condo	Hotel	Vacation rental/condo	Hotel	Vacation rental/condo (a)	Hotel (b)
Age	Average	46	44	48	48	49	47
Marital status	Married	77%	70%	71%	72%	76%	68%
	Divorced/Separated	9%	8%	11%	7%	10%	7%
	Single/Never married	12%	18%	16%	17%	10%	20% ^a
	Widowed	3%	5%	2%	4%	5%	5%
HH income	Average	\$115,231	\$107,979	\$114,957	\$122,732	\$128,758	\$133,518
Education	College grad+	57%	56%	67%	64%	64%	66%
Occupation	Executive/upper management	14%	24%	12%	20%	16%	25%
	IT professional	11%	8%	5%	8%	3%	12% ^a
	Educator	3%	3%	7%	8%	11% ^b	4%
	Homemaker	7%	9%	9%	9%	13%	7%
	Student	1%	1%	1%	2%	0%	2%
	Small business owner	7%	5%	9%	4%	7%	5%
	Skilled trade/service	8%	9%	7%	9%	8%	13%
	Other	21%	17%	21%	16%	20%	16%
	Retired	25%	17%	28%	20%	20%	16%
Not currently employed	3%	6%	1%	5%	1%	2%	
Ethnicity	Caucasian/White	93%	86%	93%	84%	88%	75%
	African-American/Black	3%	5%	6%	10%	5%	13%
	Latino/Hispanic	3%	7%	2%	5%	4%	9%
	Asian	1%	4%	0%	4%	3%	8%
	American Indian	0%	1%	0%	3%	2%	3%
	Other	1%	1%	0%	1%	1%	1%

Travel Party Characteristics

- Heat map showing source markets of fall visitors



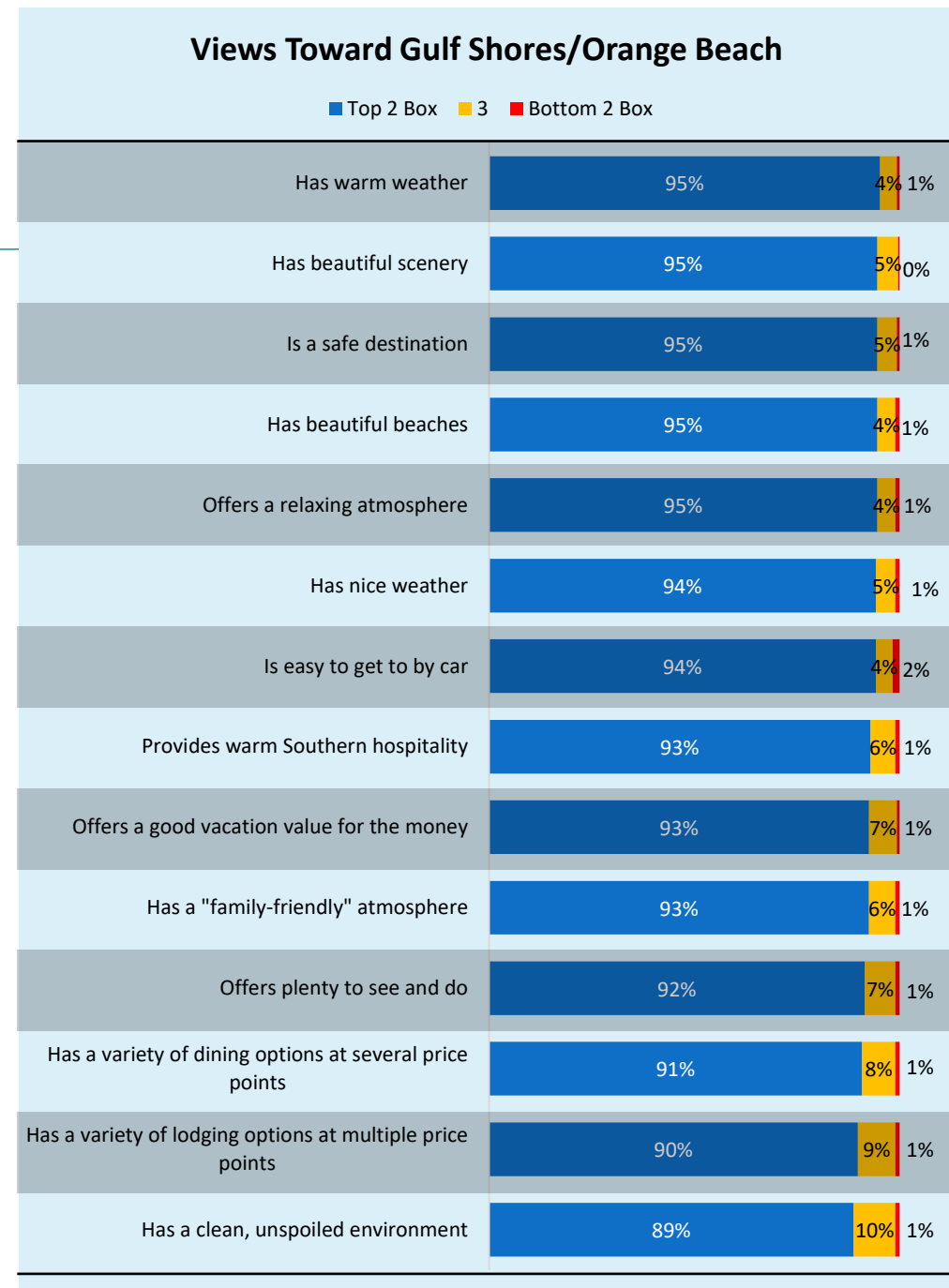
Fall 2019	
Alabama	44%
Tennessee	8%
Louisiana	7%
Mississippi	7%
Florida	7%
Georgia	5%
Texas	3%
Kentucky	3%
Indiana	3%
Arkansas	2%
Missouri	2%
Illinois	1%
Oklahoma	1%
Ohio	1%
North Carolina	1%
Michigan	1%

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 how many times they visited.

Views Toward GS/OB & Trip Satisfaction

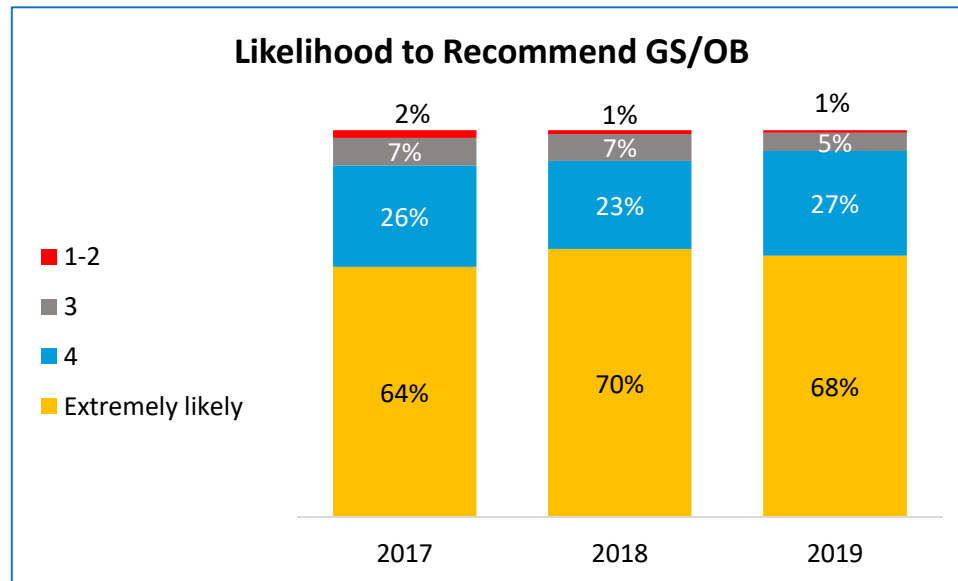
- Ratings of GS/OB by fall visitors remain overwhelmingly positive.
- Weather and scenery continue to be the most highly rated elements of the GS/OB fall experience.

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

- Fall visitors' likelihood to recommend GS/OB remains high – which is consistent with the high levels of agreement with the area's positive image attributes.
- Likelihood to recommend among both lodging types remains strong.



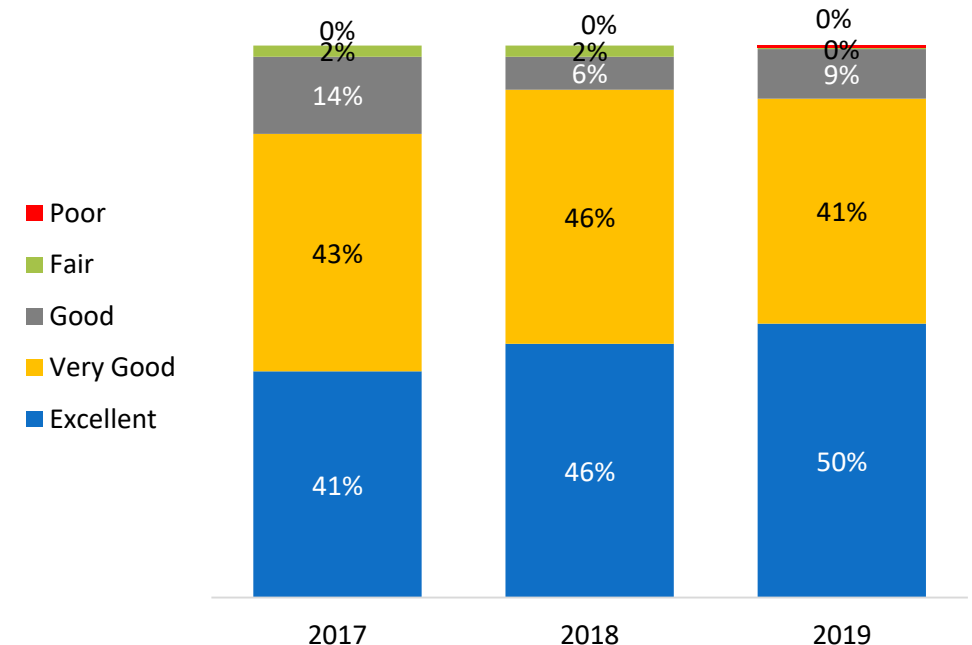
How likely are you to recommend Gulf Shores/Orange Beach to your friends or family as a destination to visit for a leisure trip? Fall visitors	2017 Top 2 Box %	2018 Top 2 Box %	2019 Top 2 Box %
Vacation rental/condo	91%	94%	96%
Hotel	90%	93%	94%

Condo/vacation rental 2017 n=118; 2018 n=162; 2019 n=206 (a)
 Hotel/motel 2017 n=265; 2018 n=235; 2019 n=231 (b)

Views Toward GS/OB & Trip Satisfaction

- GSOBT tracks service ratings to gauge whether seasonal staffing challenges are reflected in the satisfaction metric. Half of fall visitors rate their service as excellent, which is nearly 10 points higher than summer.
- There is minimal negative feedback (poor or fair ratings), but there is a shift from very good to good.
- Comments from those rating the experience “good” include:
 - Everything was good. The trip was at the end of the tourism season so a lot of things were closed or closing down.
 - Everything was nice and fun but some of the lines at the restaurants were long
 - The food was awesome but the staff wasn't really helpful
 - It is what it is, nothing special too much traffic
 - People were friendly no bad service anywhere
 - Restaurants very good but hard to get help in retail shops
 - I generally didn't get asked if I needed help while shopping so my only interaction with employees was with the checkout counter.

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

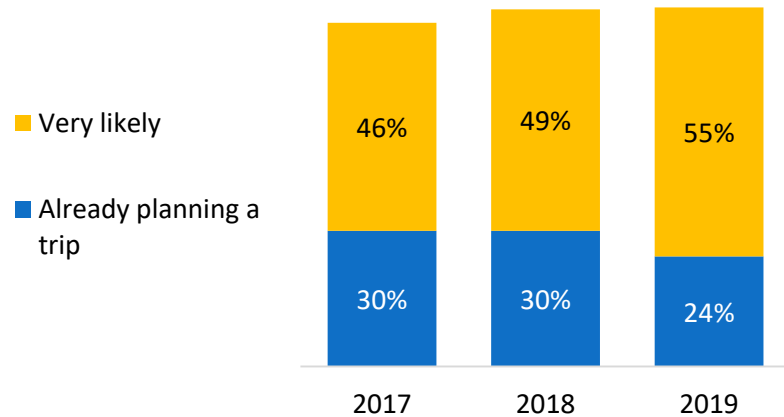


Question text: Overall, how would you rate the quality of the service you received at stores, restaurants, attractions, and lodging establishments in Gulf Shores/Orange Beach? Response options: Poor, fair, good, very good, excellent

Views Toward GS/OB & Trip Satisfaction

- Likelihood to return to GS/OB remains high, although there is a dip in those “already planning a trip.” This is true among both condo stayers and hotel stayers.
- While there is growth among those very likely to visit again next year, the overall shift is from a more definite plan to a strong consideration.

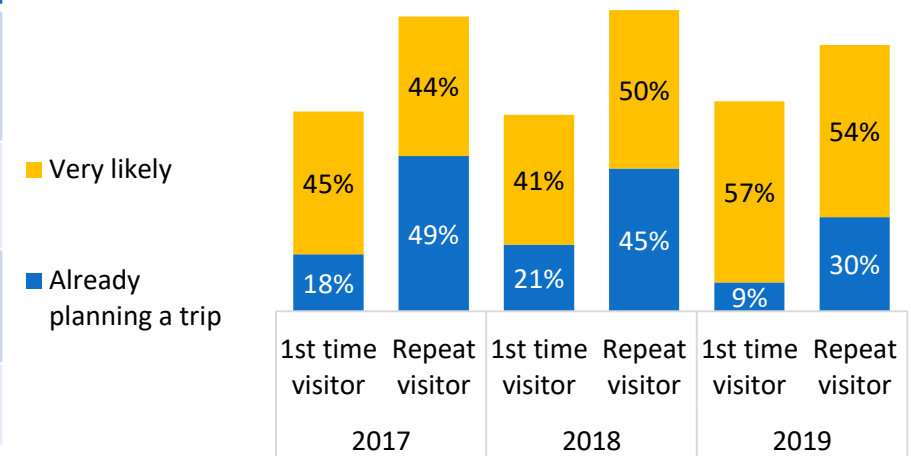
Likely to Return to GS/OB in the Next Year



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

I go there every year	54%
I've been many times and know it will deliver the vacation I want	51%
I have family and friends there	22%
I've always wanted to go there	14%

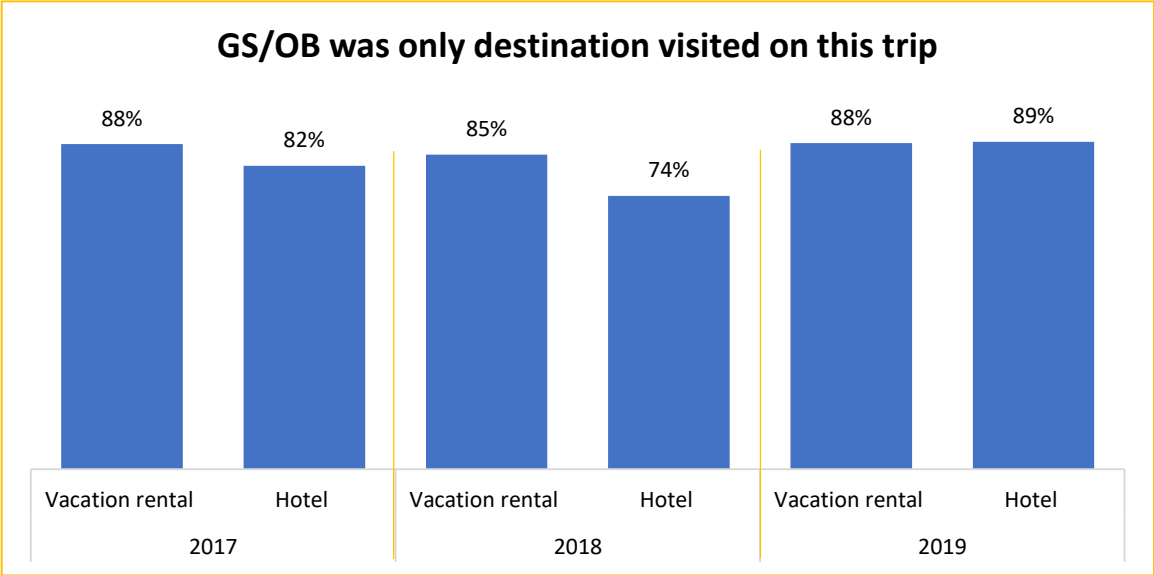
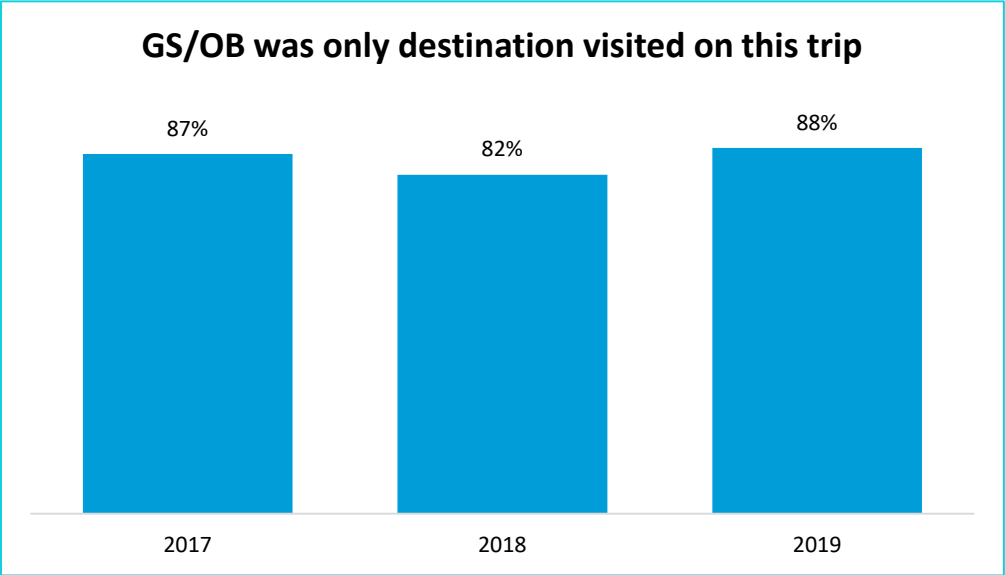
Likelihood to visit GS/OB in the next year



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

- Nearly 9 in 10 fall trips included only GS/OB, and this is true regardless of lodging type. So these visitors are coming only to this destination, and not merely stopping for the day during a longer road trip.





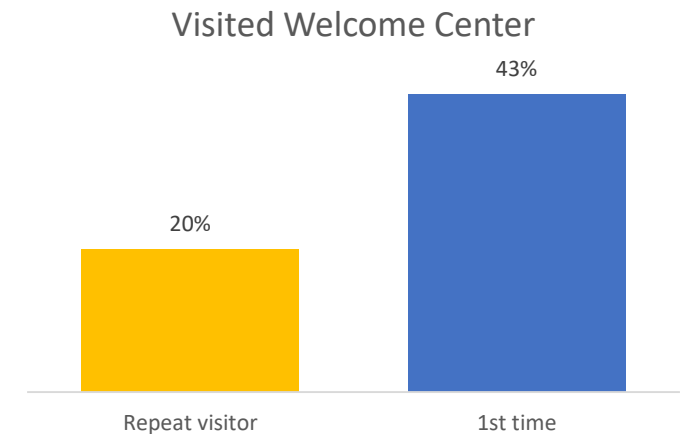
Welcome Center Supplemental Analysis

Visitor Profile Research – Fall 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. In fact, among spring and summer visitors we tend to see that visitors who went to a GSOBT Welcome Center on their trip stayed about the same amount of time in the destination. Among fall visitors, this is not the case and we do see longer stays among Welcome Center visitors. There is also higher Welcome Center visitation among 1st time visitors.
- Welcome Center visitors participated in more activities. This makes sense, given that activities and attractions are promoted at the centers.

Fall 2019 visits	No Welcome Center (a)	Visited Welcome Center (b)
Length of stay	4.1	4.9 ^a
# of activities on trip	5.8	8.7 ^a



Impact on Spending

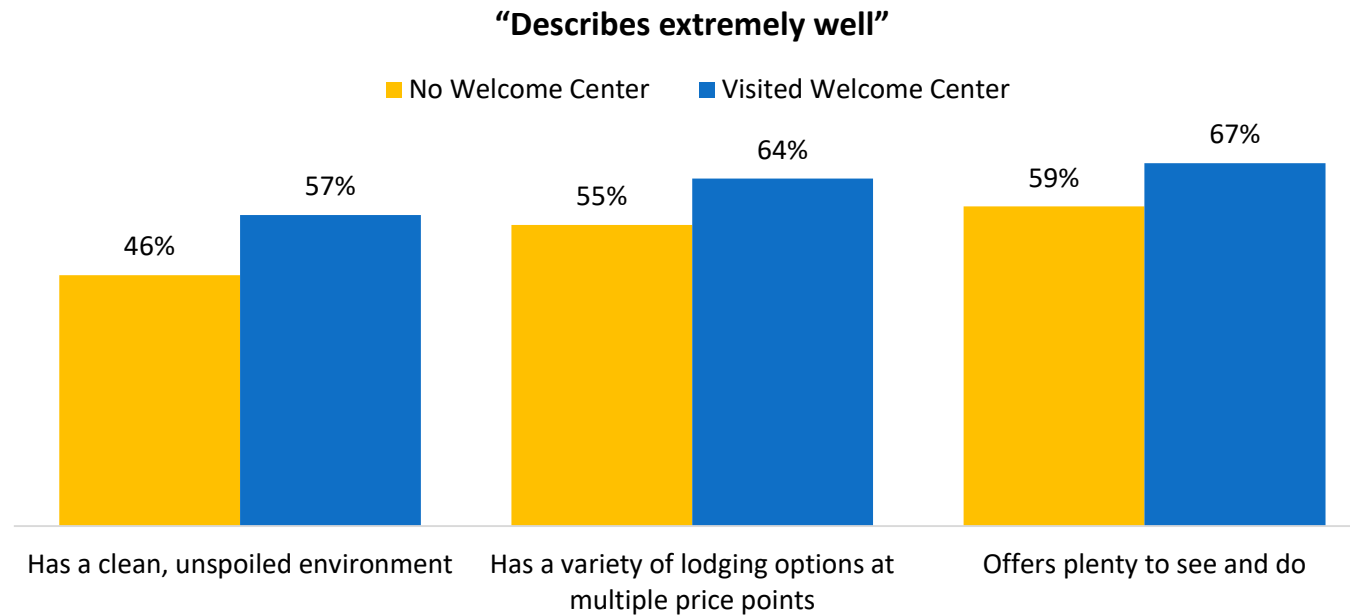
- Welcome Center visitors spent 29% more money in the destination on fall trips, particularly on recreation/entertainment and transportation within the destination.
- Lodging expenditures are lower among welcome center visitors due to these visitors tending to be new to GS/OB and more likely to be hotel stayers, with lower lodging spending.
- Again, this makes sense. While lodging decisions and length of stay are typically decided ahead of time, outings, 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	\$632	\$555
Meals/food/groceries	\$254	\$294
Shopping	\$178	\$326
Recreation or entertainment	\$90	\$209
Transportation within Gulf Shores	\$26	\$121
Other	\$24	\$45
Total	\$1,204	\$1,551

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.

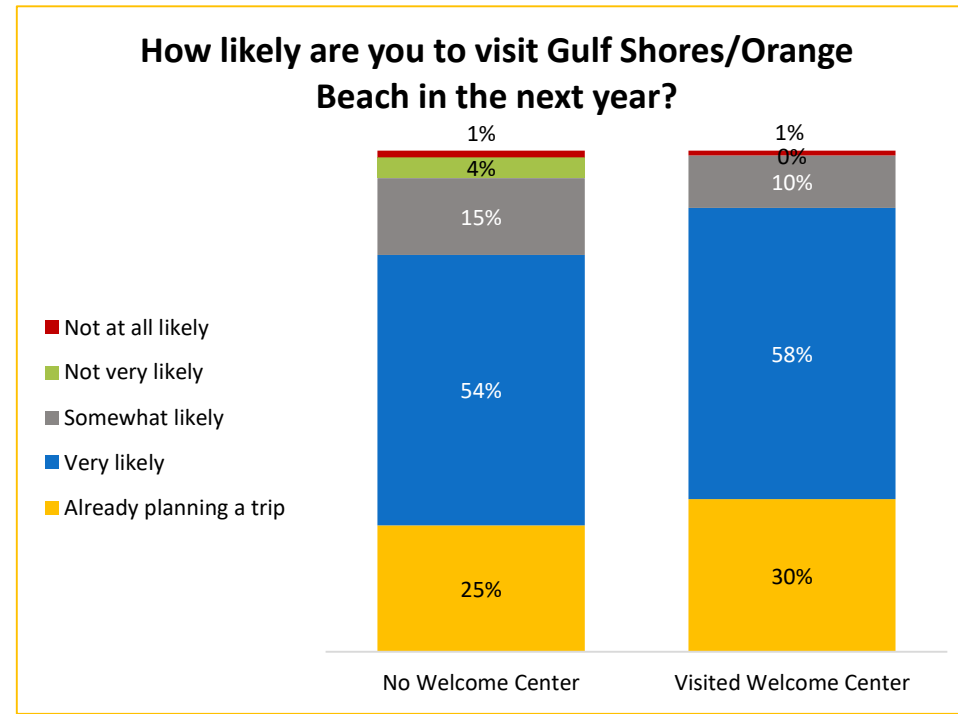
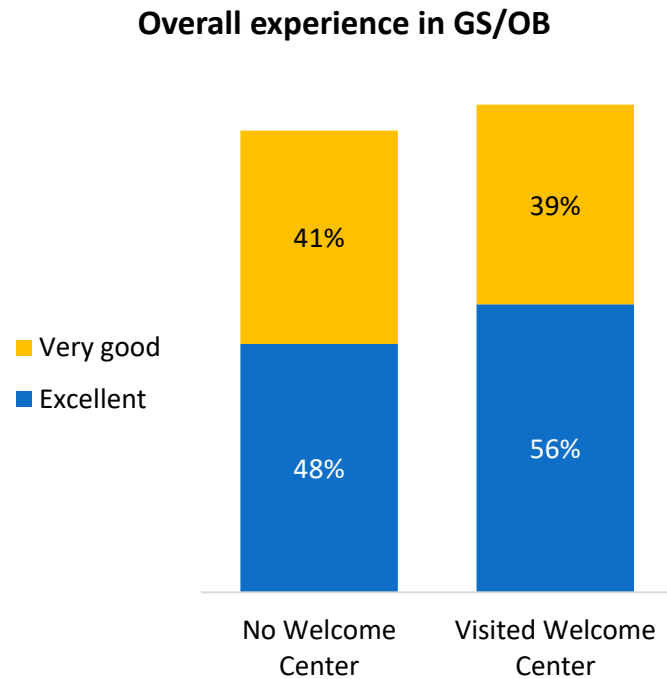
Impact on Image

- Welcome Center visitors have higher agreement with statements describing GS/OB's clean, unspoiled environment, array of lodging options, and variety of things to see and do.



Impact on Experience and Intent to Return

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





Appendix

Visitor Profile Research – Fall 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 FALL Day trips	2017	2018	2019
Average # visits/year	4.6	5.3	3.6
First time trips	34%	27%	31%

2017 day trip n=107; 2018 day trip n=59; 2019 day trip = 100

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	6%	32%	5%	46%	3%	56% ^a
1-2 weeks	12%	10%	11%	14%	10%	16%
3 weeks - 1 month	24%	20%	18%	14%	20%	13%
2 - 3 months	27%	21%	32%	20%	30% ^b	8%
4-6 months	17%	5%	18%	0%	23% ^b	6%
6+ months	14%	12%	16%	7%	12% ^b	1%

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)
	87%	75%	82%	76%	89%	90%

2017 target n=383, day trip n=107; 2018 target n=397, day trip n=59; 2019 target n=437 (a), day trip n=100 (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	34%	39%	36%	32%	29%	24%
Traveler review sites or apps	16%	12%	21%	8%	19% ^b	12%
Social media	14%	11%	19%	12%	16% ^b	10%
Hotel websites	20%	16%	26%	20%	20% ^b	9%
Gulf Shores & Orange Beach Tourism website	17%	11%	21%	12%	20% ^b	8%
Vacation home rental booking sites/apps	35%	8%	34%	3%	31% ^b	8%
Travel/visitor guide	12%	11%	12%	14%	14%	8%
Booking websites or apps	18%	14%	24%	7%	23% ^b	7%
Alabama's official tourism website	12%	7%	10%	3%	10%	6%
Travel advice websites or apps	11%	5%	16%	8%	15% ^b	5%
Local vacation rental company sites	19%	7%	16%	5%	18% ^b	4%
Magazine and newspaper articles	6%	4%	7%	2%	5%	4%
Travel blogs	9%	5%	4%	3%	6%	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=383, day trip n=107; 2018 target n=397, day trip n=59; 2019 target n=437 (a), day trip n=100 (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	39%	50%	41%	11%	44% ^b	26%
Of trips with children:	<i>2017 target n=13, day trip n=2; 2018 target n=143, day trip n=4; 2019 target n=170, day trip n=19</i>					
< 6 years old	35%	22%	49%	67%	50%	42%
6-11 years old	44%	44%	50%	33%	50%	47%
12-17 years old	52%	56%	47%	33%	47%	26%

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	83%	81%	89%	95%	83%	88%
Airplane	14%	13%	10%	3%	14%	9%
Bus	3%	6%	1%	2%	1%	2%
Other*	0%	0%	0%	0%	1%	2%

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

2017 target n=383, day trip n=107; 2018 target n=397, day trip n=59; 2019 target n=437 (a), day trip n=100 (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	4.6	3.1	4.1	3.6	4.2 ^b	2.2

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	\$802	\$ -	\$892	\$ -	\$812 ^b	\$ -
Meals/food/groceries	\$381	\$155	\$397	\$144	\$333 ^b	\$109
Shopping	\$259	\$130	\$347	\$89	\$260 ^b	\$124
Recreation or entertainment	\$175	\$116	\$184	\$59	\$143 ^b	\$74
Transportation within Gulf Shores	\$70	\$64	\$74	\$23	\$53	\$56
Other	\$43	\$28	\$36	\$30	\$37	\$6
TOTAL	\$1,729	\$493	\$1,930	\$345	\$1,638	\$369
Per person spending	\$377	\$157	\$471	\$95	\$388	\$166

2017 target n=383, day trip n=107; 2018 target n=397, day trip n=59; 2019 target n=437 (a), day trip n=100 (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	40%	40%	34%	29%	32%	38%
	Female	60%	60%	66%	71%	66%	62%
Age	Average	46	46	48	53	48	59 ^a
Marital status	Married	72%	58%	72%	75%	72%	62%
	Divorced/Separated	8%	21%	9%	8%	8%	13%
	Widowed	4%	1%	3%	5%	5%	4%
	Single/Never married	16%	20%	16%	12%	16%	20%
HH income	Average	\$110,200	\$88,627	\$119,571	\$109,102	\$129,417	\$93,011

2017 target n=383, day trip n=107; 2018 target n=397, day trip n=59; 2019 target n=437 (a), day trip n=100 (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)
Is easy to get to by car	92%	75%	91%	86%	94%	93%
Has beautiful scenery	91%	79%	93%	80%	95%	93%
Is a safe destination	90%	76%	95%	83%	95%	91%
Has a variety of dining options at several price points	88%	69%	90%	80%	91%	91%
Has warm weather	92%	78%	95%	90%	95%	91%
Provides warm Southern hospitality	90%	72%	91%	76%	93%	89%
Offers a relaxing atmosphere	92%	84%	93%	81%	95%	87%
Has beautiful beaches	92%	78%	94%	80%	95%	87%
Has a “family-friendly” atmosphere	91%	79%	95%	83%	93%	87%
Has nice weather	91%	79%	94%	80%	94%	87%
Has a variety of lodging options at multiple price points	87%	72%	89%	71%	90%	87%
Offers plenty to see and do	86%	71%	85%	80%	92%	84%
Has a clean, unspoiled environment	82%	71%	85%	75%	89%	78%
Offers a good vacation value for the money	84%	69%	87%	68%	93%	78%

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

2017 target n=383, day trip n=107; 2018 target n=397, day trip n=59; 2019 target n=437 (a), day trip n=100 (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	89%	69%	93%^b	68%	91%	84%
5 (Excellent)	51%	35%	53%	36%	50%	58%
4 (Very good)	38%	35%	40%	32%	41% ^b	26%
3 (Good)	9%	26%	6%	31%	9%	13%
2 (Fair)	2%	3%	1%	2%	0%	2% ^a
1 (Poor)	0%	2%	0%	0%	0%	1%

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	90%	77%	94%	80%	95%	84%
5 (Extremely likely)	70%	50%	74%	58%	70%	60%
4	21%	26%	19%	22%	24%	24%
3	6%	16%	6%	14%	5%	9%
2	3%	3%	0%	5%	0%	2%
1 (Not at all likely)	0%	5%	0%	2%	0%	4% ^a

2017 target n=383, day trip n=107; 2018 target n=397, day trip n=59; 2019 target n=437 (a), day trip n=100 (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)	82%	66%	80%	76%	82%	78%
5 (Already planning a trip)	41%	21%	37%	19%	28%	18%
4 (Very likely)	42%	46%	43%	58%	54%	60%
3 (Somewhat likely)	11%	19%	13%	15%	14%	18%
2 (Not very likely)	4%	9%	6%	7%	3%	2%
1 (Not at all likely)	3%	6%	1%	2%	1%	1%

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	33%	38%	33%	43%	44%	70% ^a
Summer	51%	52%	43%	54%	41%	33%
Fall	59%	42%	61%	44%	65%	56%
Winter	15%	19%	10%	20%	16%	21%

2017 target n=383, day trip n=107; 2018 target n=397, day trip n=59; 2019 target n=437 (a), day trip n=100 (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)
Alabama	21%	18%	21%	32%	44%	42%
Georgia	8%	4%	7%	5%	5%	2%
Tennessee	11%	8%	9%	5%	8%	0%
Florida	11%	25%	10%	22%	7%	36% ^a
Louisiana	9%	6%	9%	7%	7%	2%
Texas	11%	13%	9%	15%	3%	7%
Mississippi	6%	3%	7%	10%	7%	7%
Indiana	5%	6%	2%	0%	3%	0%
Missouri	4%	1%	2%	0%	2%	0%
Illinois	2%	3%	2%	0%	1%	2%
Michigan	2%	2%	2%	0%	1%	0%
Wisconsin	0%	3%	1%	0%	0%	0%
Arkansas	3%	1%	4%	0%	2%	2%
Oklahoma	1%	1%	2%	0%	1%	0%
Kentucky	1%	2%	5%	0%	3%	0%
Ohio	1%	3%	2%	0%	1%	0%

2017 target n=383, day trip n=107; 2018 target n=397, day trip n=59; 2019 target n=437 (a), day trip n=100 (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)
Dining out	59%	34%	66%	44%	67% ^b	39%
Beaches	64%	33%	74%	42%	69% ^b	30%
Shopping	49%	26%	57%	20%	47% ^b	29%
Relaxing	56%	35%	64%	37%	66% ^b	25%
Sightseeing	29%	23%	34%	20%	29% ^b	14%
Shelling	16%	9%	15%	10%	16% ^b	8%
Visiting friends/relatives who live in the area	8%	12%	10%	12%	13%	8%
Watching wildlife	13%	12%	16%	8%	15%	8%
Concerts and nightlife	13%	7%	10%	5%	11%	7%
Exercise/working out	14%	7%	10%	10%	11%	7%
Festivals or special events (non-sports events)	7%	4%	9%	3%	10%	6%
Historical sites	12%	8%	12%	5%	13% ^b	6%
Photography	11%	9%	15%	10%	11%	6%
Boating or sailing	8%	4%	9%	7%	6%	5%
Bicycle riding	5%	7%	7%	2%	5%	4%
Birdwatching	6%	2%	8%	7%	5%	4%
Dolphin tour	10%	7%	10%	3%	11% ^b	4%
Family/friends reunion	13%	8%	10%	14%	7%	4%
Fishing	18%	7%	15%	5%	8%	4%
Hiking on trails	9%	7%	9%	8%	8%	4%
Sporting events	4%	3%	6%	0%	6%	4%
Swimming	48%	25%	45%	15%	37% ^b	4%
Tennis	6%	1%	2%	0%	2%	4%
Scuba diving/snorkeling	3%	3%	6%	2%	4%	3%
Golfing	8%	5%	6%	3%	9% ^b	2%
Parasailing/jet skiing	6%	4%	4%	3%	4%	2%
Visiting a spa	9%	6%	6%	3%	6%	2%
Kayaking/canoeing/paddle boarding	10%	5%	6%	5%	7% ^b	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 table.

2017 target n=383, day trip n=107; 2018 target n=397, day trip n=59; 2019 target n=437 (a), day trip n=100 (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	8%	5%	9%	3%	9%	4%
Alabama Gulf Coast Zoo	10%	6%	9%	2%	8%	5%
Alabama's Coastal Connection Scenic Byway	9%	2%	10%	0%	8%	3%
Battleship USS Alabama	7%	4%	8%	0%	10%	6%
Bellingrath Gardens	5%	1%	3%	2%	4%	2%
Bon Secour National Wildlife Refuge	6%	1%	5%	0%	6%	4%
Dauphin Island	13%	6%	11%	7%	11%	7%
Fort Morgan Historic Site	10%	4%	7%	5%	13% ^b	3%
Gulf State Park	16%	4%	17%	5%	20% ^b	6%
Hugh S. Branyon Backcountry Trail	6%	1%	3%	0%	2%	4%
National Naval Aviation Museum	4%	3%	6%	2%	8%	7%
OWA Park	2%	5%	4%	3%	3%	5%
Tanger Outlets	26%	10%	30%	15%	29%	22%
The Track	10%	0%	8%	2%	5%	2%
The Wharf	14%	9%	17%	5%	18% ^b	4%
Waterville	3%	3%	3%	2%	5%	1%

2017 target n=383, day trip n=107; 2018 target n=397, day trip n=59; 2019 target n=437 (a), day trip n=100 (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.