GULF SHORES & ORANGE BEACH TOURISM
Alabama's White-Sand Beaches

Visitor Profile Research

Winter 2019-20

Strategic Marketing & Research Insights LLC

COVID-19 (Coronavirus) Considerations

- The COVID-19 disease, caused by the coronavirus, started to make headlines in January 2020, when China began reporting infections and deaths.
- By the end of January, the virus had spread to many countries, including the U.S.
- The virus continued to spread throughout February, and national, state, and local governments began to take actions to mitigate infections.
- By March, the virus dominated the new cycle, as it disrupted life and caused the stock market to plummet. Some key March headlines included:
    - March 11: WHO declares pandemic, NBA suspends season, Tom Hanks tests positive, President Trump announces European travel ban
    - March 12: NCAA cancels March Madness, NHL and MLB suspend seasons, U.S. stocks plummet in worst day since 1987
    - March 13: President Trump declares national emergency
    - March 14: White House extends travel ban to UK and Ireland
    - March 15: California and many other U.S. locations announce broad social distancing measures
    - March 16: The White House issues guidelines urging Americans to avoid restaurants and bars, limit gatherings to 10 or fewer people, and work from home when possible
    - March 17: Italy reports 475 COVID-19 deaths, the highest single-day death toll for any country since the outbreak began. The U.S. death toll hits 100
    - March 19: Globally, authorities report more than 240,000 confirmed cases of COVID-19. Nearly all U.S. states declare a state of emergency
    - March 20: New York, Illinois residents told to stay at home
- These events took a toll on U.S. leisure travel. This visitor profile research fielded from March 11 to 31. During this time we did not see any drop in consumer willingness to take a survey. Consumer sentiment regarding travel did change, as many people canceled or postponed leisure trips late in the month. But given that the bulk of this research is mostly backward-looking we are confident that we have collected representative and meaningful data. Backward-looking means that the key data inputs concern past behavior such as exposure to ads and leisure travel during winter 2019-20. There are some measures that could be impacted by the pandemic, most notably questions about likelihood to visit again. So it is important to keep the situation in mind when interpreting certain research results.

Table of Contents

GULF SHORES & ORANGE BEACH TOURISM
Alabama's White-Sand Beaches

Introduction

Visitor Profile Research – Winter 2019-20

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 2019-20 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 final of four seasonal reports for 2019-20 (the winter season is defined as December through February).

Research Objectives

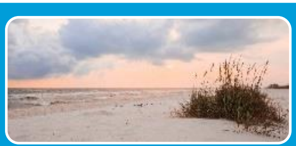
Gather information on fall visitors, determining visitor origins and demographics

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

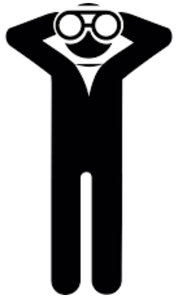
Methodology

- This report presents information collected through online surveys of visitors to Gulf Shores, Orange Beach or Fort Morgan during winter 2019-20 (December through February).
- 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 winter months (December through February). More detail is included on the following slides.

Number of trips represented in the data	Winter 2019-20
Target trips (stayed 1-30 nights in paid accommodations)	455
Non-target trips (visited but did not stay overnight)	108

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
- Needs 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 91,064 unique non-resident devices that entered the defined GS/OB area during winter 2019-20. (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 winter 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.

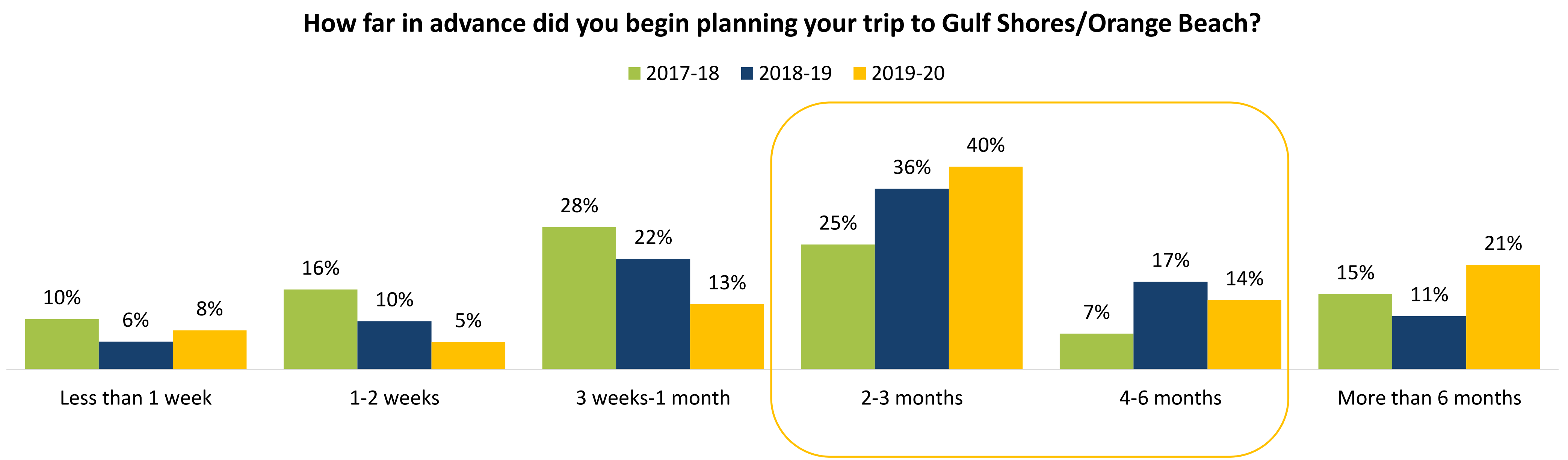
GULF SHORES & ORANGE BEACH TOURISM
Alabama's White-Sand Beaches

Detailed Findings

Visitor Profile Research – Winter 2019-20

Travel Planning

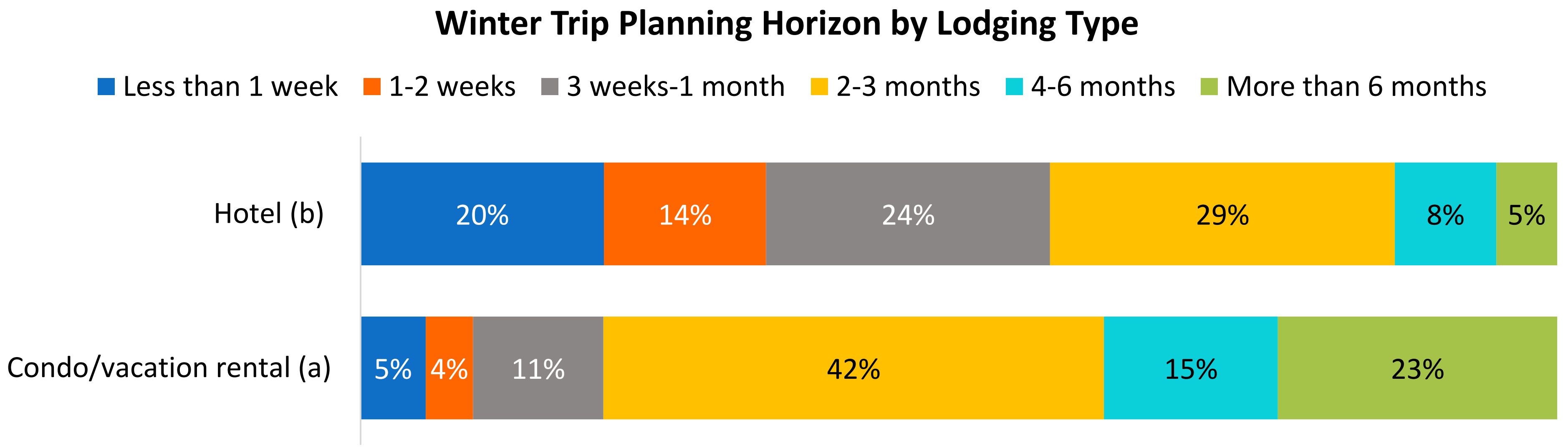
- Half of winter trips are planned 2 to 6 months in advance, with a shift toward a slightly shorter travel planning window. This may be due to consumers' desire to be responsive to less predictable winter weather.



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

Travel Planning – Hotel vs. Condo Rental

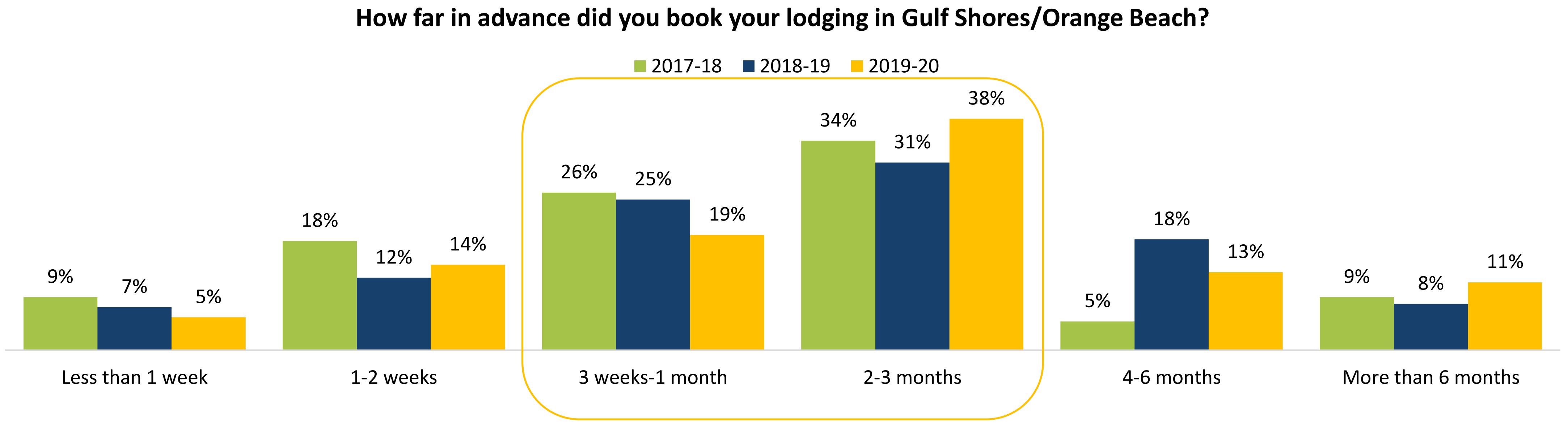
- As we have seen in each season, hotel stayers take less time to plan their GS/OB stays than vacation renters.



Vacation rental/condo n=78 (a); Hotel/motel n=377 (b); a / b indicate statistically significant differences at the 95% level.
Question text: How far in advance did you begin planning your trip to Gulf Shores/Orange Beach? Response options as shown in graph above.

Travel Planning – Lodging Bookings

- Roughly four in 10 winter visitors begin planning their trip 2-3 months ahead of visiting GS/OB, and a similar share books lodging 2-3 months ahead of travel.
- Half as many winter visitors book lodging 3 weeks to a month ahead.

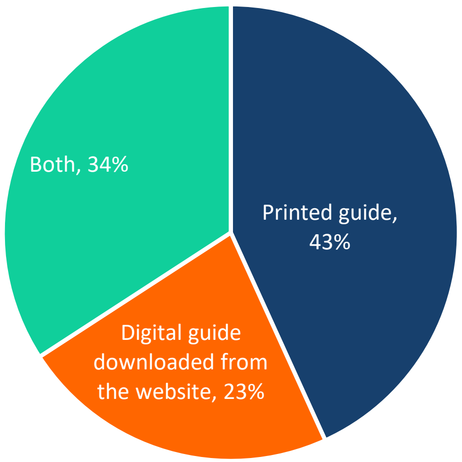


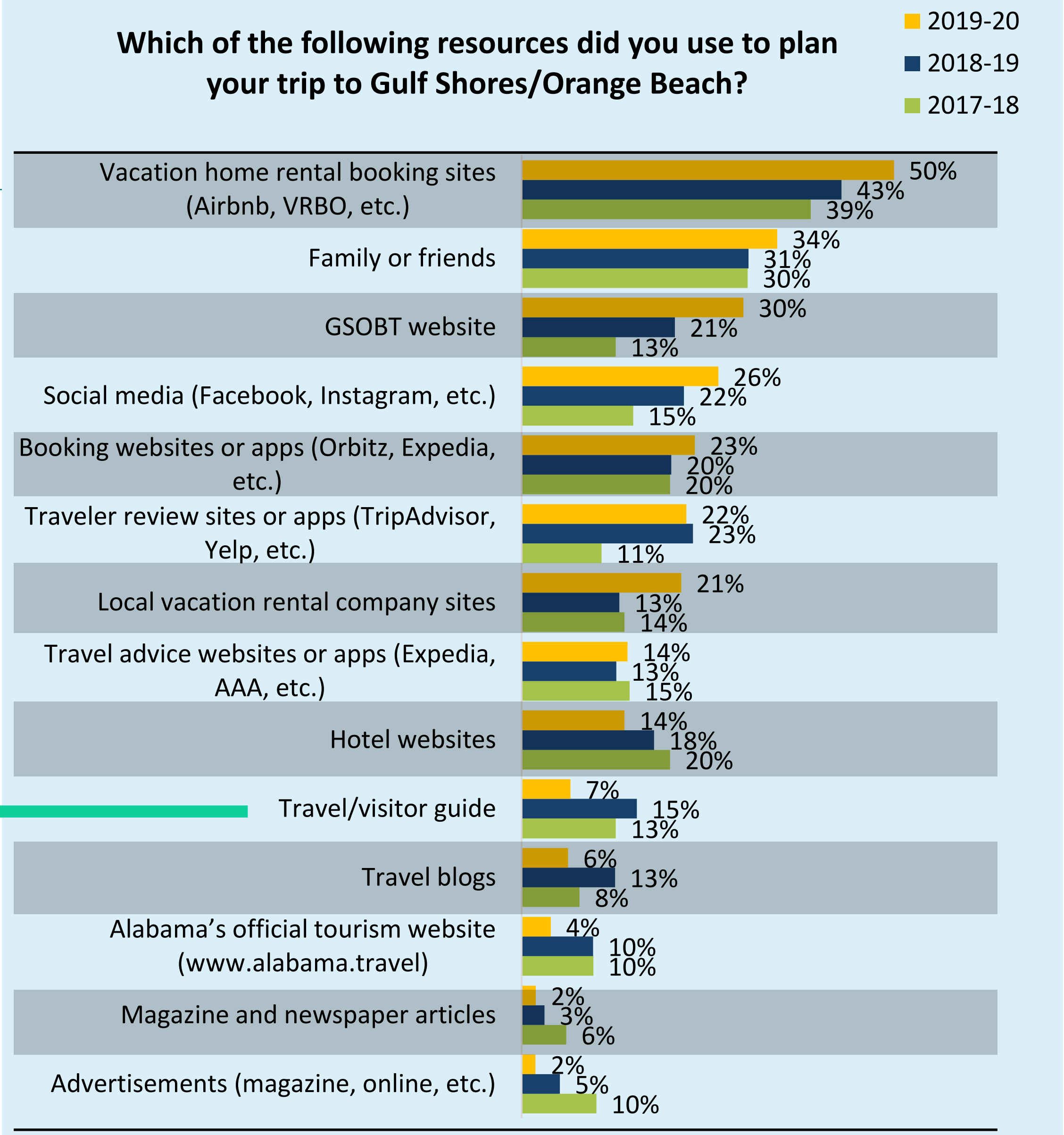
Question text: How far in advance did you book your lodging in Gulf Shores/Orange Beach? Response options as shown in graph above.

Travel Planning – Resources Used

- The top winter visit planning resources remain vacation home rental sites and family/friends, followed by the CVB's website and social media.
- Visitor guide usage remains relatively low, with three-fourths of winter visitors using the printed guide, with or without the digital version.

Visitor Guide format (2019-20)



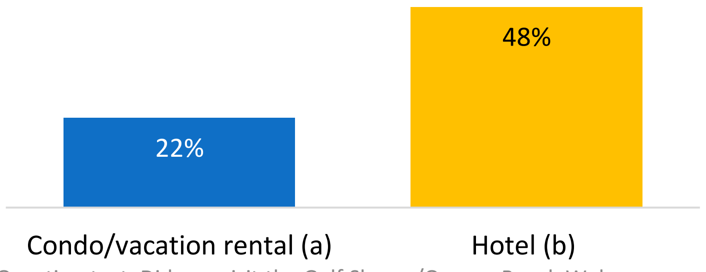


Question text: Which of the following resources did you use to plan your trip to Gulf Shores/Orange Beach? Response options as shown in table.

Travel Planning – Hotel vs. Condo Rental

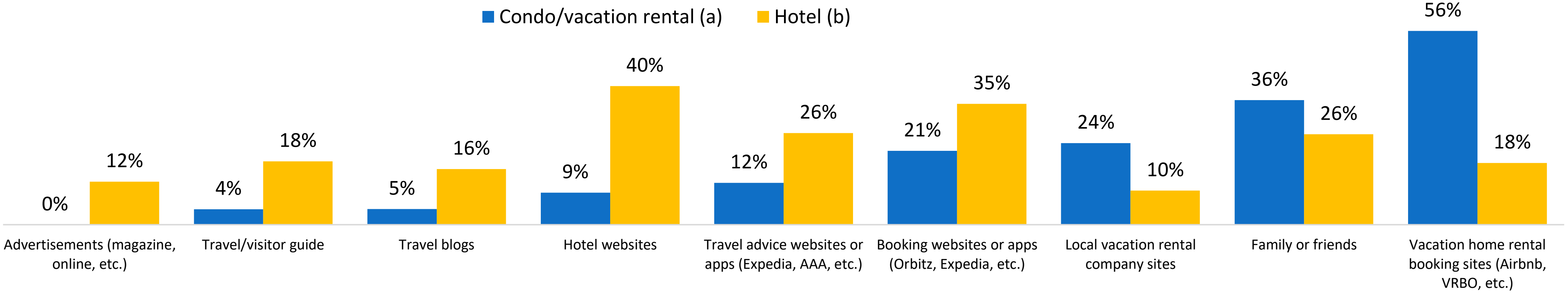
- Hotel stayers use the Welcome Centers at a higher rate, which is consistent with other seasons.
- Hotel stayers also rely on ads, the visitor guide, hotel websites and other online travel resources at a higher rate than condo stayers. Hotel stayers tend to be newer to GS/OB, so are looking for information from more sources to plan their visits.

Visited a Gulf Shores/Orange Beach Welcome Center (2019)



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

Trip planning resources with biggest difference by lodging type

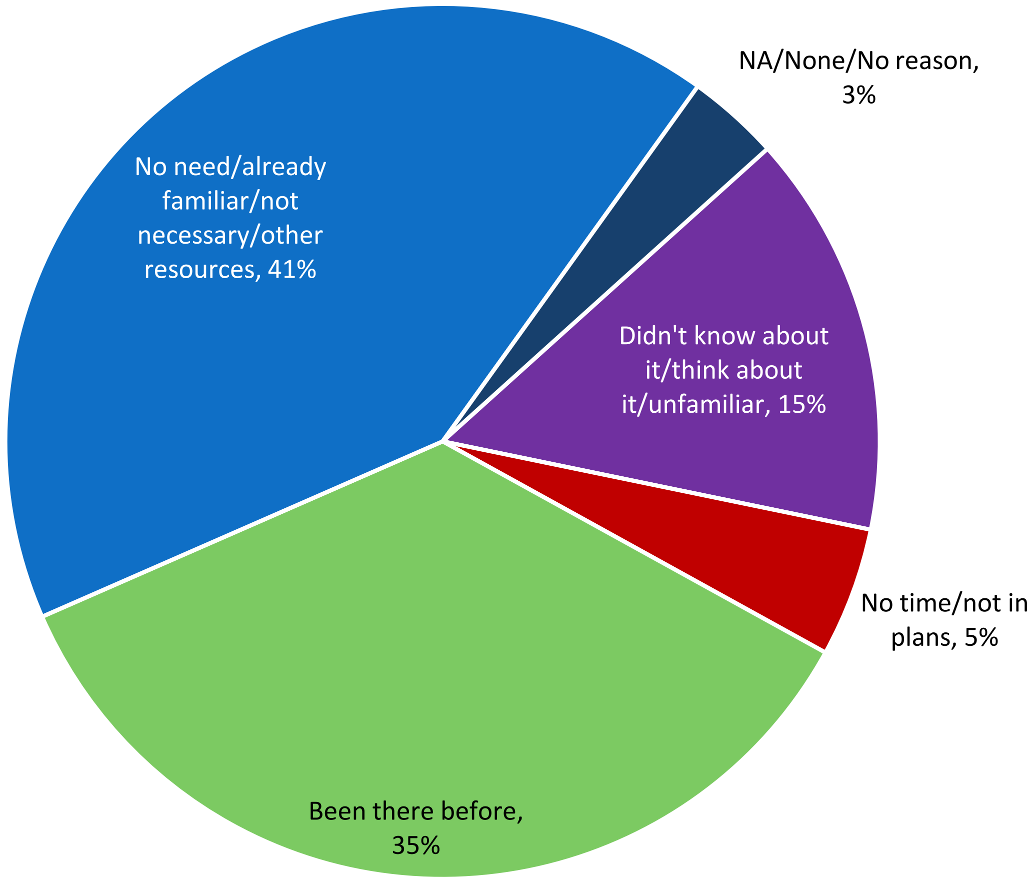


Vacation rental/condo n=78 (a); Hotel/motel n=377 (b); a / b indicate statistically significant differences at the 95% level.
Question text: Which of the following resources did you use to plan your trip to Gulf Shores/Orange Beach? ? Response options as shown in graph above.

Travel Planning

- Of those who did not visit a Welcome Center, four in 10 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?

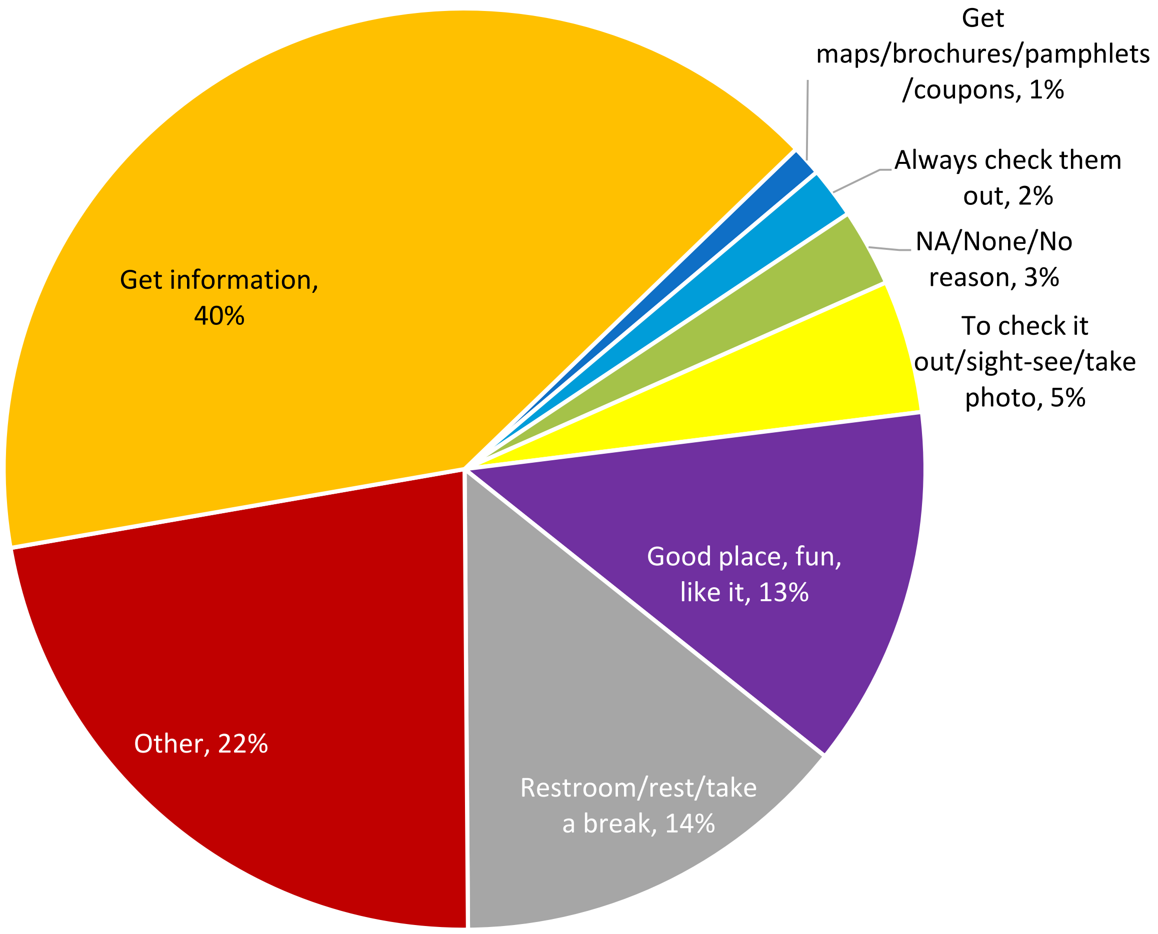


Question text: Why didn’t you visit the Welcome Center? [open ended response]

Travel Planning – Welcome Center Visitors

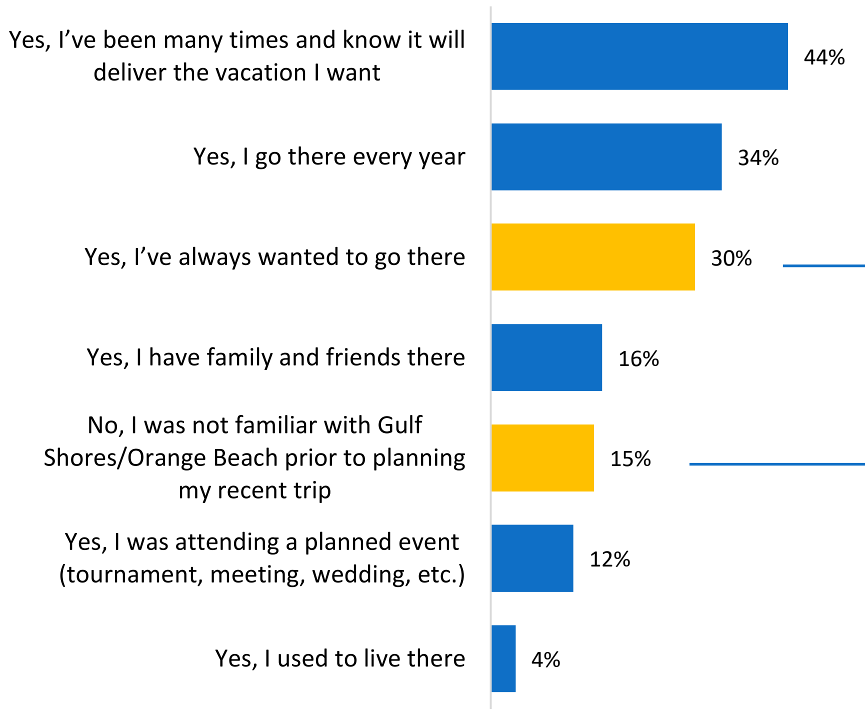
- In summer and fall, a third of visitors who stopped at a Welcome Center did so to get information. An even higher share of winter visitors used the Welcome Center for this purpose.

Why did you visit the Welcome Center?

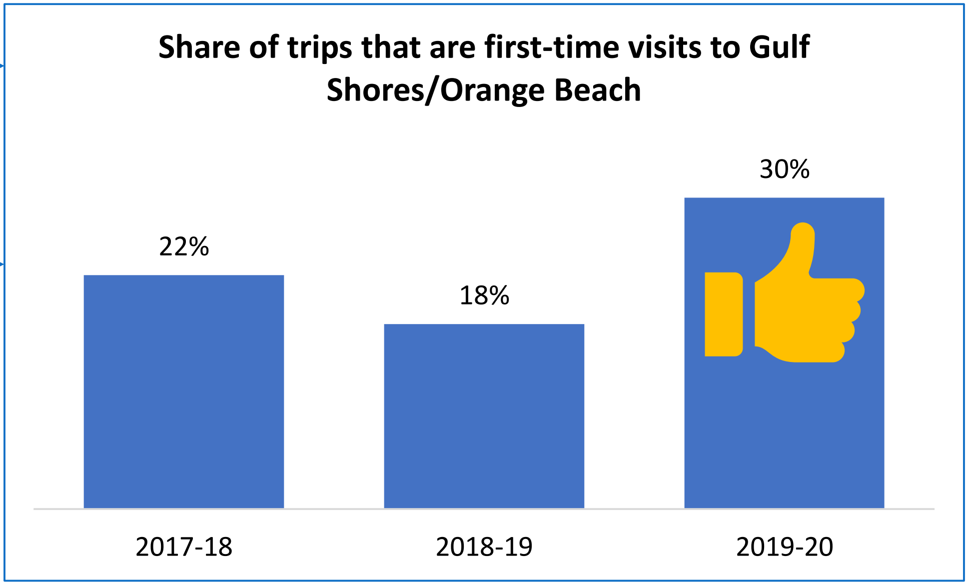


Trip Characteristics – First-Time Visitors

Prior to this visit, was Gulf Shores/ Orange Beach familiar to you? (2019-20)

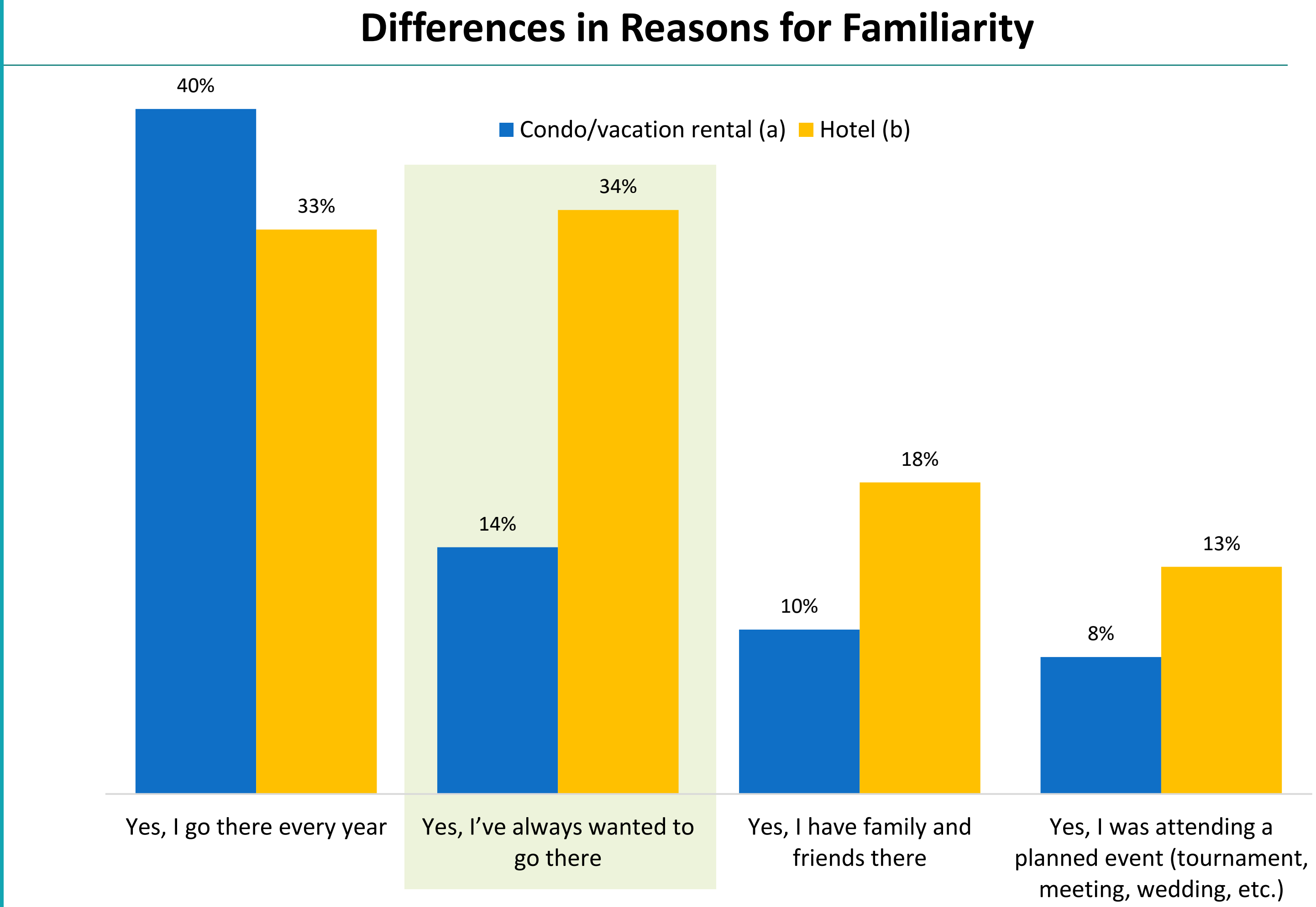


- First-time visitation in winter reached 30% this year.
- This is a higher share than among fall visitors.



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

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

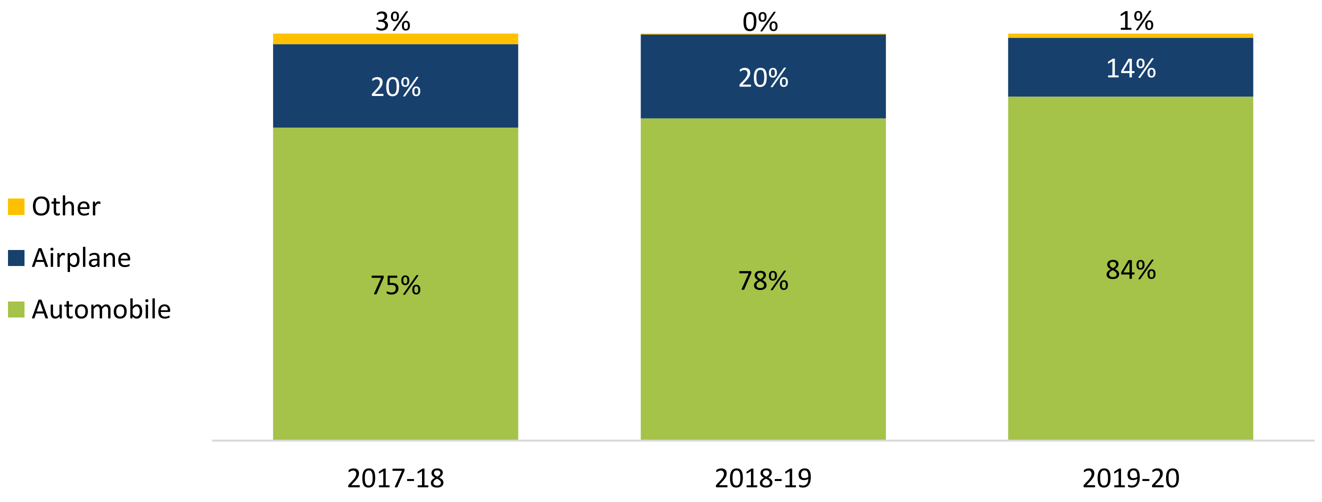


Vacation rental/condo n=78 (a); Hotel/motel n=377 (b); a / b indicate statistically significant differences at the 95% level.
Question text: Prior to your visit, was Gulf Shores/Orange Beach familiar to you? Response options as shown in graph above.

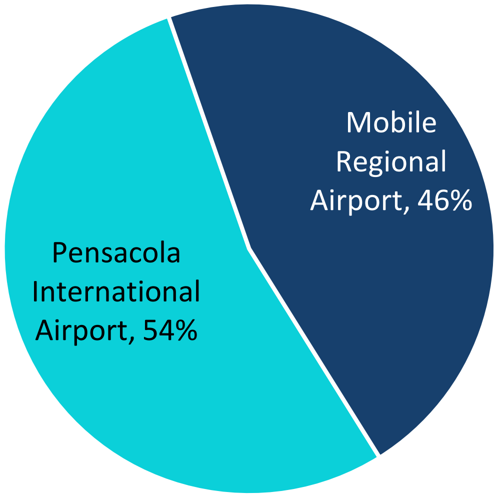
Trip Characteristics – Drive vs. Fly

- Most winter visitors drive to GS/OB, with an uptick in drive visits this winter over last. More than three-fourths of those who flew came from the Los Angeles area, Houston, and New Orleans.
- The only airports into which these visitors flew were Pensacola and Mobile, with roughly equal shares using each.

How did you get to Gulf Shores/Orange Beach?



Into which airport did you fly?



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 – Activities

- Dining out, relaxing, and the beach are the top winter visit activities.
- This is the first time we have seen dining out top beaches, and this could be weather-related, as could the decline in shelling.

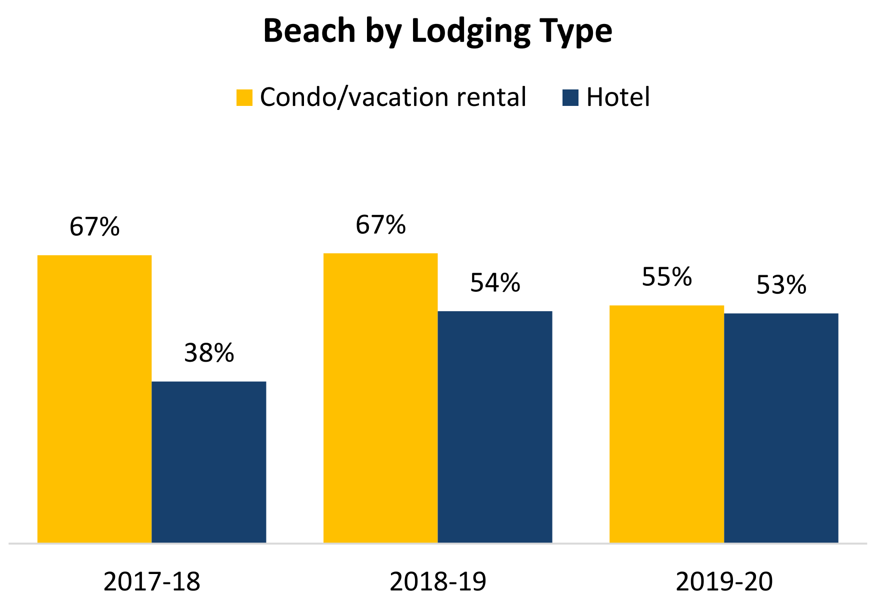
Winter trip participation	2017-18	2018-19	2019-20
Dining out	52%	61%	73%
Relaxing	49%	56%	58%
Beaches	64%	66%	55%
Shopping	41%	50%	50%
Sightseeing	40%	41%	35%
Swimming	27%	30%	30%
The Wharf	14%	27%	28%
Tanger Outlets	7%	27%	28%
Dolphin tour	11%	14%	22%
Photography	16%	16%	17%
Gulf State Park	8%	26%	15%
Fishing	14%	11%	13%
Hiking on trails	12%	19%	12%
OWA Park	5%	5%	12%
Visiting friends/relatives in the area	12%	20%	12%
Shelling	18%	21%	12%
Battleship USS Alabama	7%	12%	11%
Adventure Island	5%	13%	11%
Bicycle riding	7%	13%	10%
Watching wildlife	22%	17%	10%
Exercise/Working out	12%	18%	9%
AL's Coastal Connection Scenic Byway	5%	15%	9%
Concerts and nightlife	14%	13%	8%
Sporting events	1%	3%	8%
Kayaking/Canoeing/Paddle boarding	13%	11%	7%
Visiting a spa	8%	9%	7%

Cont'd.	2017-18	2018-19	2019-20
Hugh S. Branyon Backcountry Trail	3%	3%	7%
Dauphin Island	11%	11%	6%
Fort Morgan Historic Site	9%	12%	5%
Boating or sailing	8%	11%	5%
Scuba diving/Snorkeling	7%	6%	5%
Bellingrath Gardens	5%	3%	4%
Bon Secour National Wildlife Refuge	9%	10%	4%
The Track	3%	6%	4%
Festivals or special events (non-sports events)	7%	12%	4%
Birdwatching	9%	6%	4%
Golfing	5%	9%	4%
Alabama Gulf Coast Zoo	3%	14%	4%
Historical sites	12%	15%	4%
Parasailing/Jet skiing	5%	4%	3%
Family/friends reunion	18%	15%	3%
National Naval Aviation Museum	7%	14%	2%
Tennis	9%	3%	2%
Waterville	7%	5%	1%

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

Trip Characteristics – Beach Activities

- Beach activities were more common among condo stayers in past winters, but this year participation has leveled off between condo and hotel stayers. Again, weather is likely a key factor here.



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 2019-20 n=78 (a); Hotel/motel 2019-20 n=377 (b)
a / b indicate statistically significant differences at the 95% level.

Trip Characteristics – Beach Motivation

- Nearly half of winter visitors chose Gulf Shores/Orange Beach because of the beach.
- Other top motivators of winter 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. This is similar to the lift we saw among fall 2019 visitors.

Winter trip motivators	2017-18	2018-19	2019-20
Beaches	46%	53%	54%
Relaxing	31%	38%	37%
Dining out	24%	18%	35%
Sightseeing	20%	18%	15%
Shopping	22%	18%	14%
Visiting friends/relatives who live in the area	5%	12%	10%
Swimming	5%	12%	10%
The Wharf	5%	6%	9%
Dolphin tour	3%	5%	9%
Tanger Outlets	5%	9%	9%

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 – Spending

- Winter trip spending is down overall and among both lodging types. Cold weather snaps may have led to less time spent in the destination, with less shopping and recreation.

Average Travel Party Expenditures per Trip – WINTER	2017-18		2018-19		2019-20	
	Spending	% of total	Spending	% of total	Spending	% of total
Lodging	$890	45%	$944	41%	$1,032	58%
Meals/food/ groceries	$389	20%	$460	20%	$334	19%
Shopping	$280	14%	$338	15%	$199	11%
Recreation or entertainment	$261	13%	$243	11%	$144	8%
Transportation within Gulf Shores	$94	5%	$271	12%	$47	3%
Other	$58	3%	$53	2%	$25	1%
TOTAL	**$1,972**		**$2,310**		**$1,781**	

2017-18 n=554; 2018-19 n=401; 2019-20 n=455

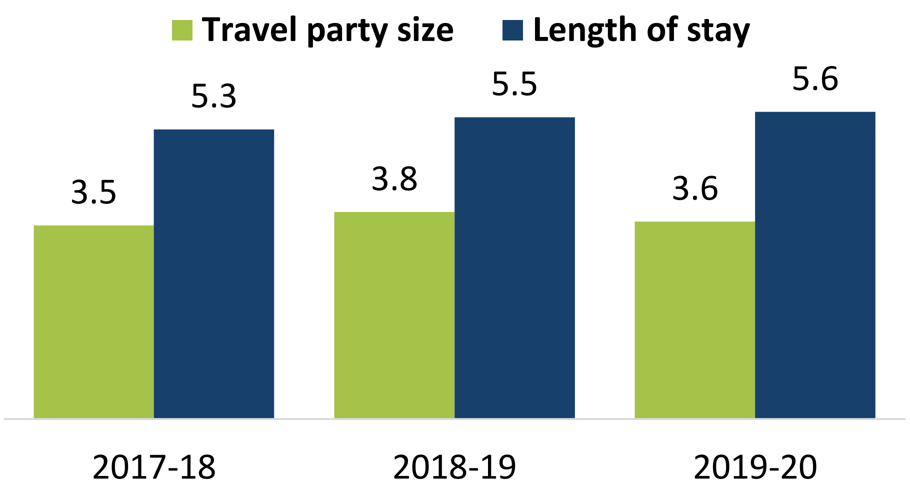
Average Travel Party Expenditures per Trip – WINTER	2017-18		2018-19		2019-20	
	Vacation rental	Hotel	Vacation rental	Hotel	Vacation rental (a)	Hotel (b)
Lodging	$955	$396	$1,022	$407	$1,123	$425
Meals/food/groceries	$410	$226	$489	$260	$352	$223
Shopping	$285	$242	$349	$257	$199	$202
Recreation or entertainment	$268	$204	$250	$189	$145	$133
Transportation within Gulf Shores	$91	$121	$297	$91	$40	$93
Other	$55	$77	$50	$74	$25	$27
TOTAL	**$2,064**	**$1,267**	**$2,458**	**$1,278**	**$1,882**	**$1,103**

Condo/vacation rental 2017-18 n=100; 2018-19 n=109; 2019-20 n=78
Hotel/motel 2017-18 n=454; 2018-19 n=292; 2019-20 n=377

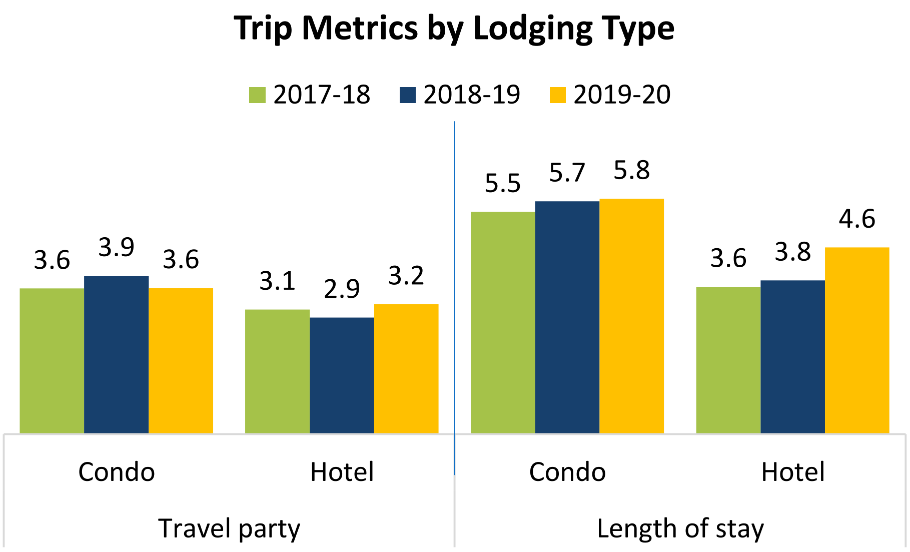
Question text: To help us better understand the economic impact of tourism, what was the approximate amount of money your travel party spent while in Gulf Shores/Orange Beach on your trip? [Category prompts] Open-ended numeric responses.

Travel Party Characteristics

- Travel party size remains at just over 3.5 people per winter trip on average, with condo stayers having larger travel parties and hotel stayers having smaller.
- Winter visitors in both lodging types stayed longer in the destination this year.



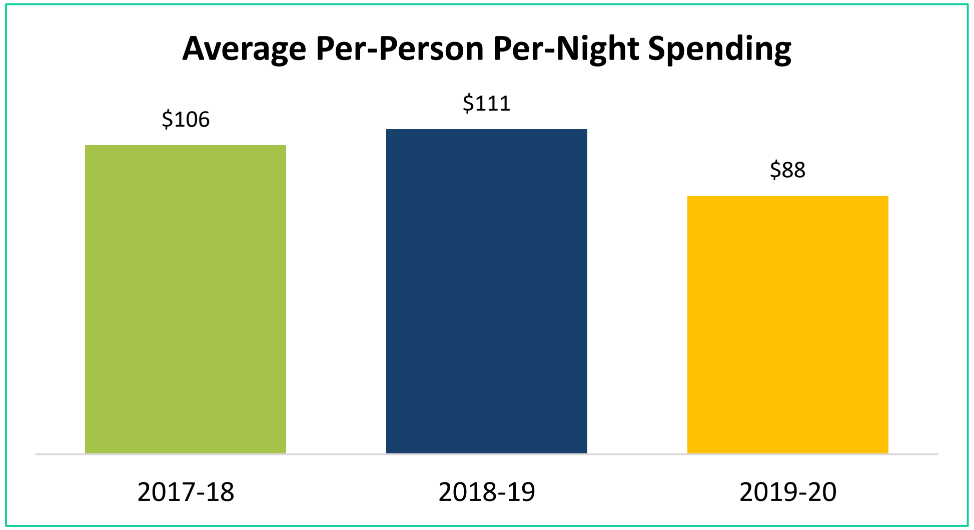
Question text: Including yourself, how many people were in your travel party? How many nights did you stay in Gulf Shores/Orange Beach during this trip? If you did not stay overnight, please enter '0'. Open-ended numeric responses.

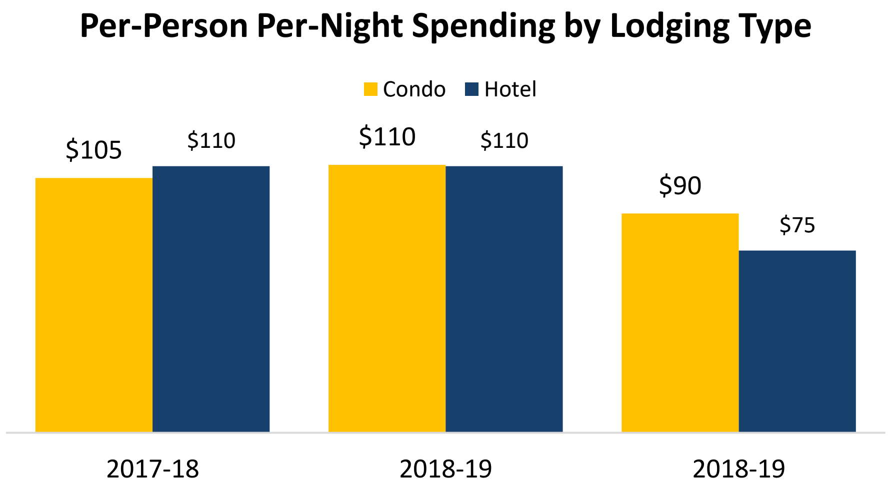


Condo/vacation rental 2017-18 n=100; 2018-19 n=109; 2019-20 n=78
Hotel/motel 2017-18 n=454; 2018-19 n=292; 2019-20 n=377

Travel Party Characteristics

- Hotel spending consistently brings per-person per-night trip expenditures up. But with lower spending overall, that is not the case in winter 2019-20.
- In fact, lower overall spending and longer stays means the per-person per-night spending is lower across the board.

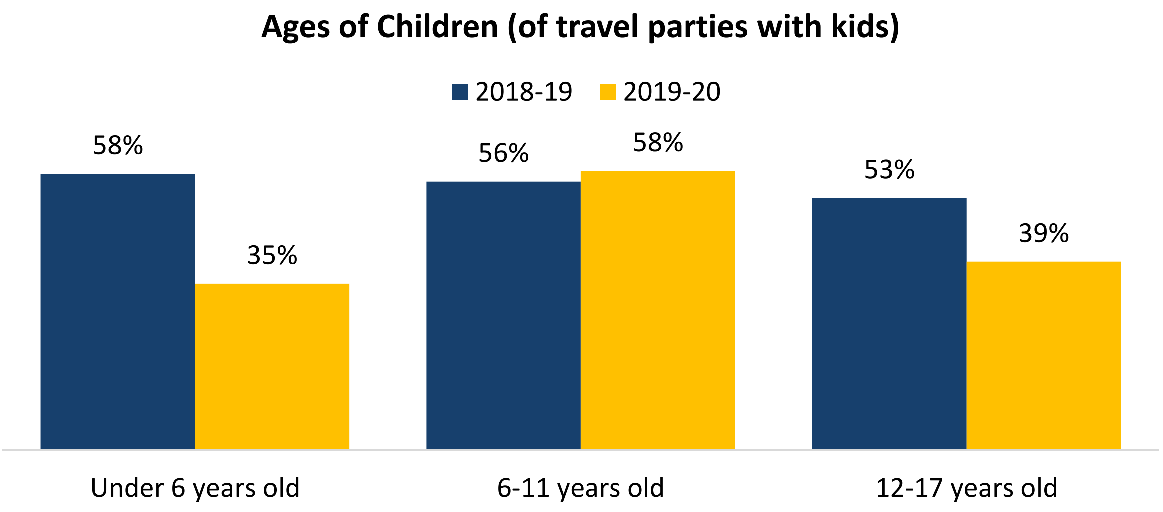




Question text: To help us better understand the economic impact of tourism, what was the approximate amount of money your travel party spent while in Gulf Shores/Orange Beach on your trip? [Category prompts]
Including yourself, how many people were in your travel party? How many nights did you stay in Gulf Shores/Orange Beach during this trip? If you did not stay overnight, please enter '0'. Open-ended numeric responses.
Condo/vacation rental 2017-18 n=100; 2018-19 n=109; 2019-20 n=78
Hotel/motel 2017-18 n=454; 2018-19 n=292; 2019-20 n=377

Travel Party Characteristics

- 43% of winter travel parties include children. This is similar to spring and fall, and lower than in summer, when nearly 6 in 10 travel parties included kids.
- Winter trips are more likely to include younger school-aged children.



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, with an increase in household income.

Year-over-Year Demographic Profile Winter visitors		2017-18	2018-19	2019-20
Age	Average	44	44	42
Marital status	Married	76%	73%	76%
	Divorced/Separated	9%	6%	6%
	Single/Never married	2%	1%	1%
	Widowed	12%	20%	17%
HH income	Average	$98,425	$132,941	$137,357

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)

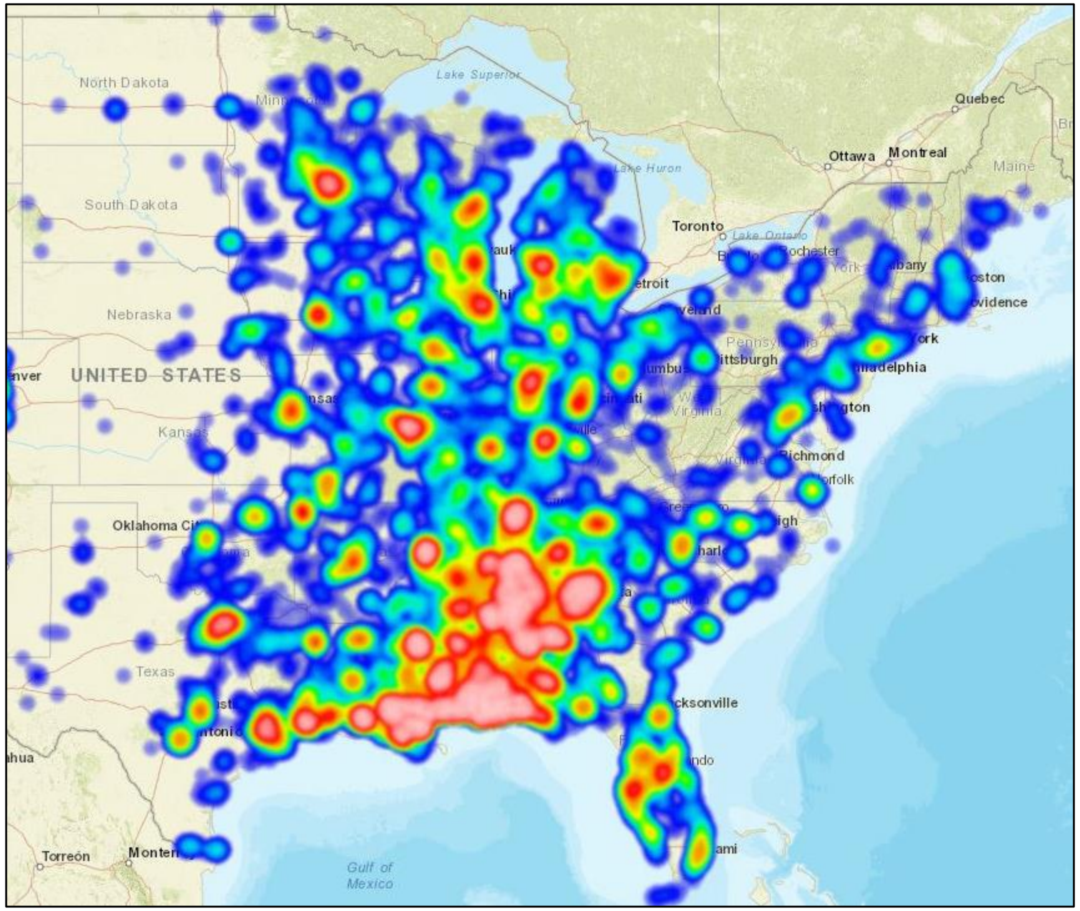
Travel Party Characteristics

- Year-to-year, the household income increase is seen in both lodging types.
- Hotel stayers are consistently younger than condo stayers.

Winter demographic profile by lodging type		2017-18		2018-19		2019-20	
		Vacation rental/condo	Hotel	Vacation rental/condo	Hotel	Vacation rental/condo (a)	Hotel (b)
Age	Average	45	38	45	42	47[b]	40
Marital status	Married	77%	71%	73%	70%	73%	76%
	Divorced/Separated	9%	8%	6%	8%	8%	5%
	Single/Never married	2%	3%	1%	2%	0%	1%
	Widowed	12%	18%	19%	20%	18%	17%
HH income	Average	$106,918	$97,372	$127,950	$133,320	$141,950	$136,143
Education	College grad+	70%	69%	68%	67%	65%	69%
Occupation	Executive/upper management	10%	27%	17%	24%	8%	25%
	IT professional	12%	16%	10%	18%	8%	22%
	Educator	5%	6%	13%	6%	15%	6%
	Homemaker	7%	6%	11%	10%	7%	7%
	Student	7%	2%	2%	2%	0%	2%
	Small business owner	5%	8%	6%	4%	12%	4%
	Skilled trade/service	12%	6%	6%	12%	8%	7%
	Other	12%	14%	11%	14%	25%	15%
	Retired	25%	10%	18%	12%	10%	8%
	Not currently employed	7%	5%	2%	0%	7%	4%
Ethnicity	Caucasian/White	86%	80%	89%	77%	87%	83%
	African-American/Black	7%	9%	2%	8%	10%	8%
	Latino/Hispanic	7%	6%	7%	12%	2%	10%
	Asian	0%	7%	8%	8%	3%	5%
	American Indian	2%	2%	0%	0%	0%	2%
	Other	2%	1%	0%	0%	0%	0%

Travel Party Characteristics

- Heat map showing source markets of winter visitors

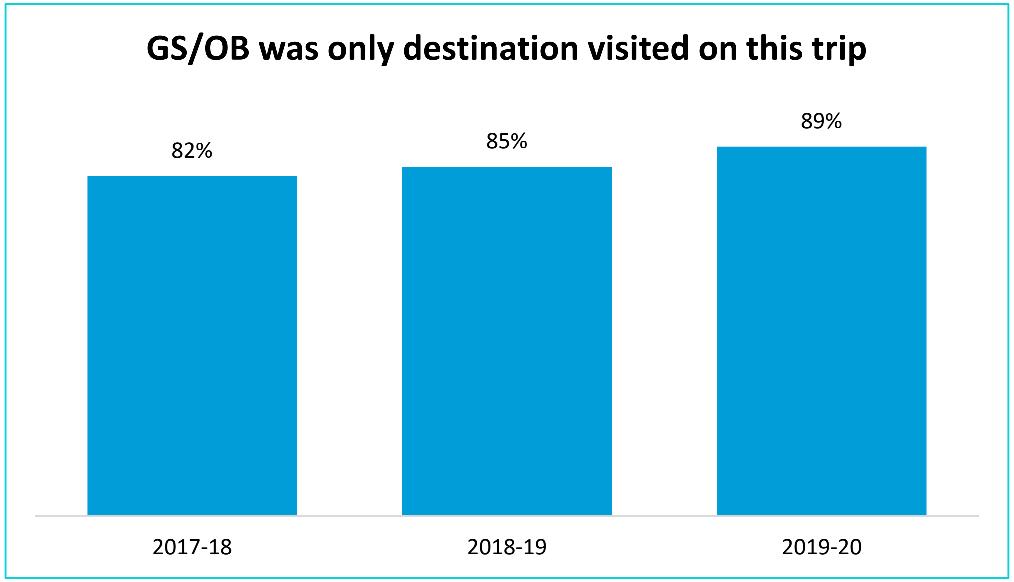


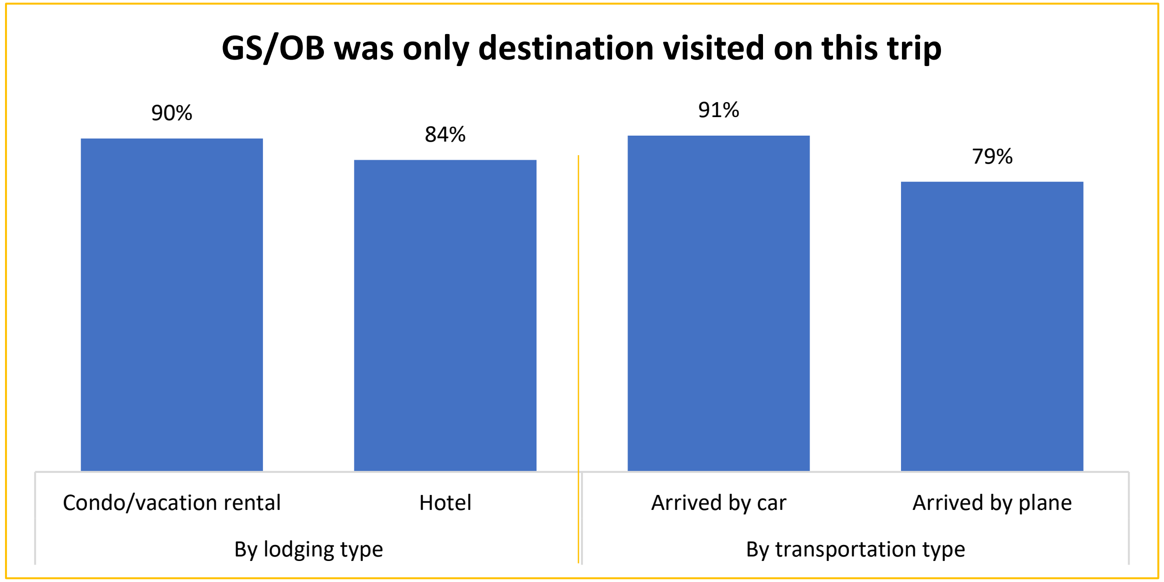
Winter 2019-20	
Alabama	42%
Florida	11%
Louisiana	8%
Mississippi	7%
Tennessee	4%
Georgia	4%
Texas	3%
Wisconsin	2%
Missouri	2%
Indiana	2%
Michigan	2%
Illinois	2%
Arkansas	1%
Iowa	1%
Minnesota	1%
Kentucky	1%

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.

Destinations Visited

- Nearly 9 in 10 winter trips included only GS/OB. So these visitors are coming only to this destination, and not merely stopping for the day during a longer road trip.
- Even those who fly to the area are mainly visiting GS/OB, and not a host of other places.

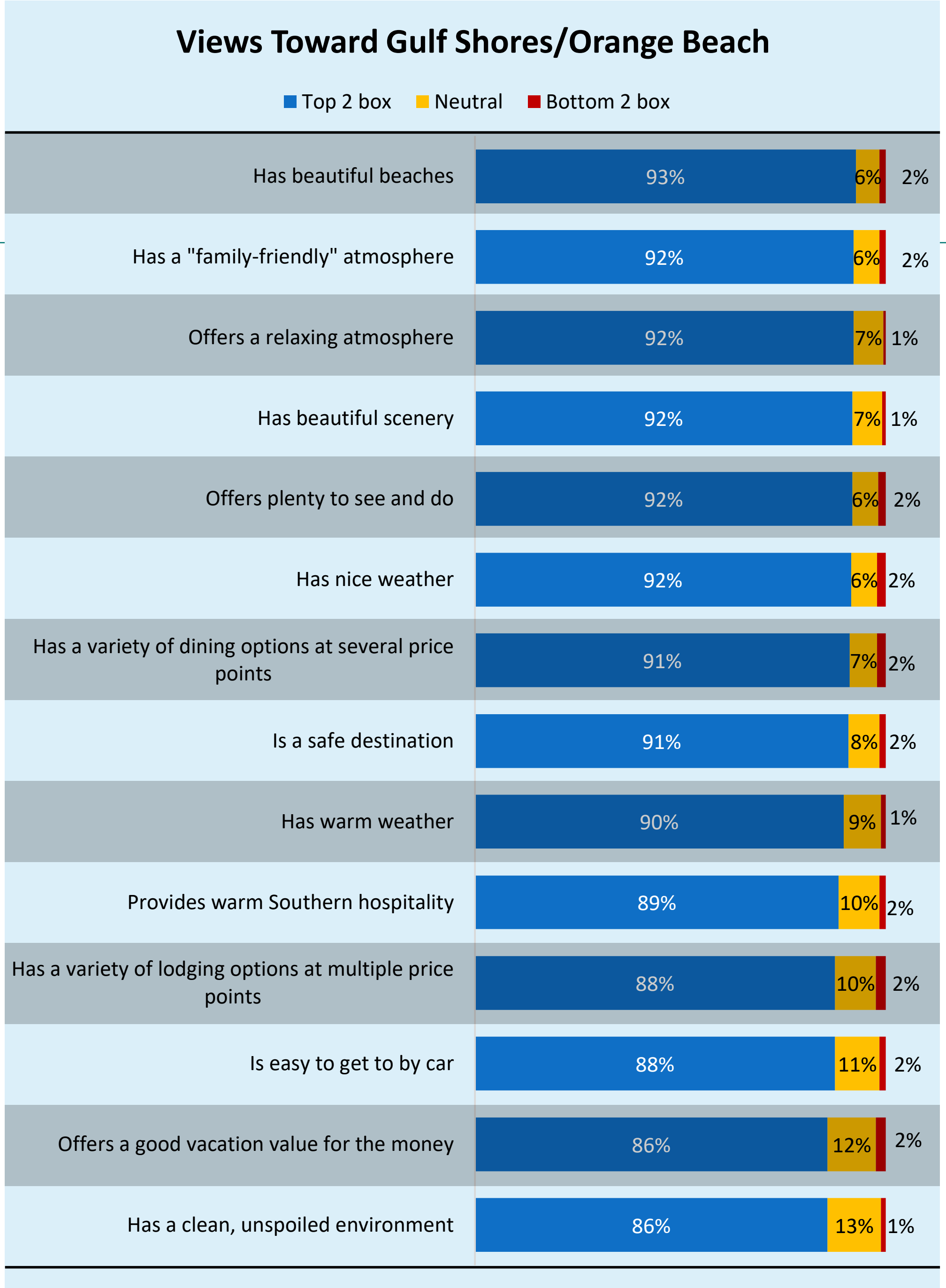




Question text: Was Gulf Shores/Orange Beach the only destination you visited on this trip? Yes/No

Views Toward GS/OB & Trip Satisfaction

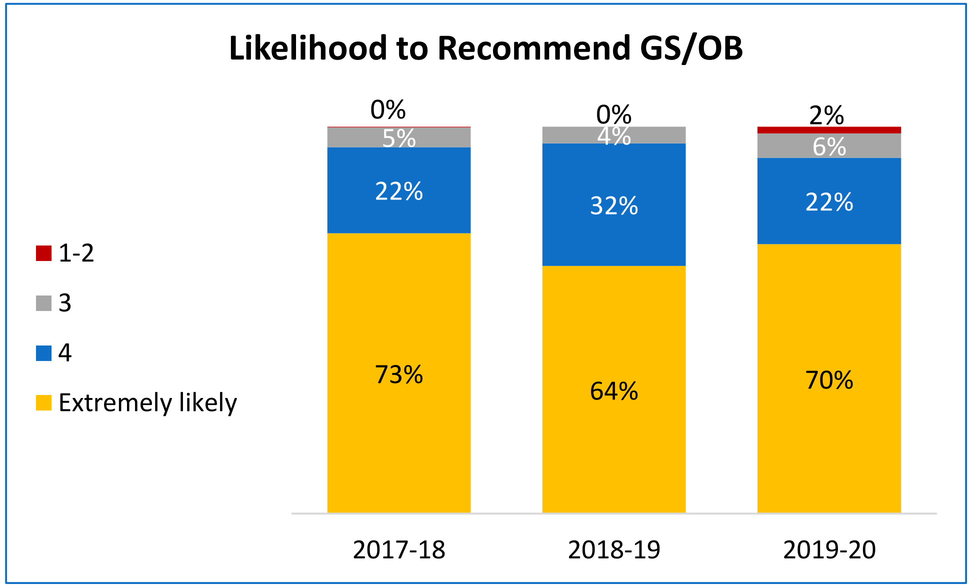
- Ratings of GS/OB by winter visitors remain overwhelmingly positive.
- The beaches, scenery, and atmosphere – family friendly and relaxing – are the highest rated elements of the destination.
- If weather conditions brought fewer winter visitors, it could be that service was better for these visitors, which would generate higher satisfaction and ratings.



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

- Winter 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, although it is lower this winter among condo stayers than it has been in years past.



How likely are you to recommend Gulf Shores/Orange Beach to your friends or family as a destination to visit for a leisure trip? Winter visitors	2017-18 Top 2 Box %	2018-19 Top 2 Box %	2019-20 Top 2 Box %
Vacation rental/condo	95%	96%	88%
Hotel	91%	94%	93%

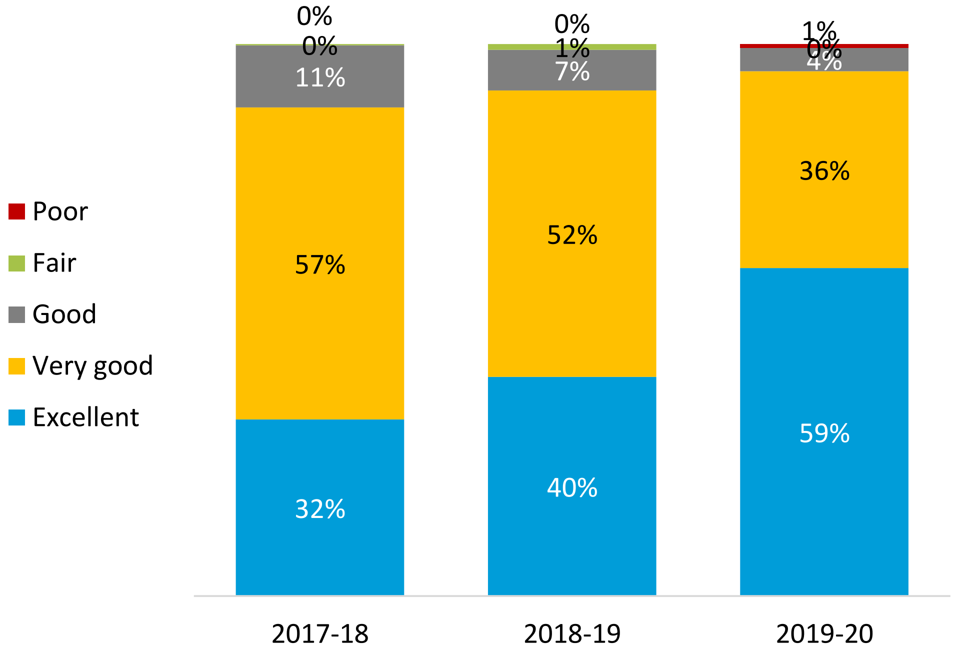
Condo/vacation rental 2017-18 n=100; 2018-19 n=109; 2019-20 n=78 (a)
Hotel/motel 2017-18 n=454; 2018-19 n=292; 2019-20 n=377 (b)

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. Nearly six in 10 winter visitors rate their service as excellent, which is almost 10 points higher than fall.
- There is minimal negative feedback (poor or fair ratings).
- Comments from those rating the experience "good" include:
  - I was able to get an authentic and remarkable experience all throughout my stay.
  - I was not blown away but it wasn't bad
  - The service was slow for the restaurants to not be very busy.
  - The food was good service was inconsistent
  - Majority, of the service was excellent. However, there were a couple instance's, in which, less than satisfactory were experienced.
  - It was quality but not anything out of the ordinary
  - Food wasn't as great as I had expected; especially seafood

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

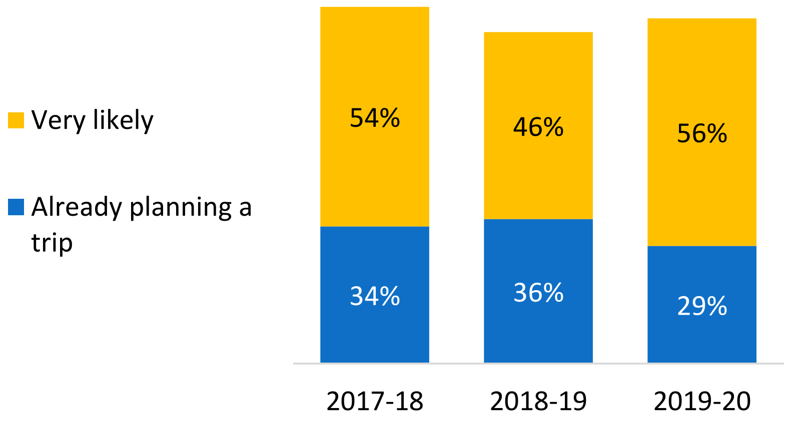


Question text: Overall, how would you rate the quality of the service you received at stores, restaurants, attractions, and lodging establishments in Gulf Shores/Orange Beach? Response options: Poor, fair, good, very good, excellent

Views Toward GS/OB & Trip Satisfaction

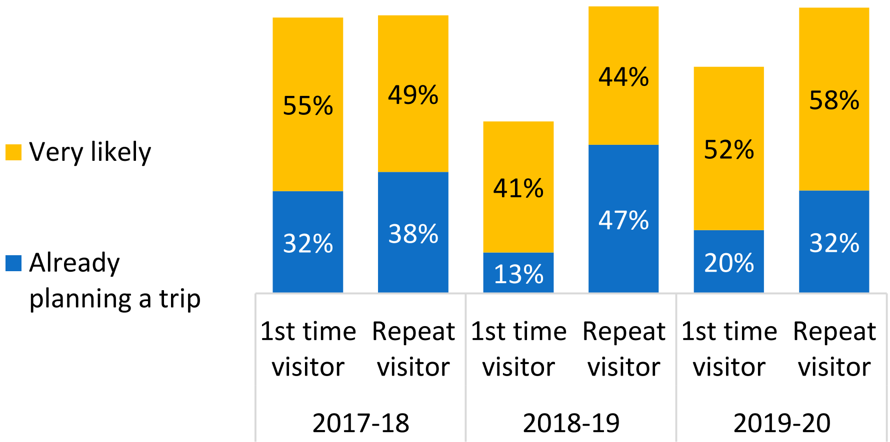
- Likelihood to return to GS/OB remains high, although there is a dip in those "already planning a trip," which we saw in fall as well.
- This could be due to the rise in shares of first-time visitors, who are generally very likely to return, but have not begun planning their return trip in the same numbers as repeat visitors are.

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	52%
I go there every year	43%
I've always wanted to go there	28%
Yes, I was attending a planned event	13%

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

Likelihood to Visit

- In this wave of data collection, additional follow-up questions were asked of those winter visitors who report they are unlikely to return to GS/OB (n=9). The initial follow-up was an opportunity to answer, in open-ended fashion, why they are not likely to visit again in the coming year. Their responses include:
  - Budget and poor economy
  - Don't go to the same place annually. Switch it up each time. Will most likely visit in 3 to 5 years
  - I have other plans
  - I like to try different places
  - Visiting other cities
  - Wasn't impressed nothing exciting to do but beaches and we have beaches closer to home
  - We are traveling in the western united states. Also, racism does not make it comfortable to visit Alabama. We likely won't spend money there because of your horrible conservative politics, such as taking away abortion rights and the way you kill people who are innocent.
  - We decided to wait before taking another trip due to the coronavirus
- Responses to a follow-up question with a pre-populated list of options reinforce these reasons – the majority of those who will not return right away are not choosing *against* GS/OB. Rather they are choosing to go elsewhere. Half agreed that they "want to go somewhere else next year." Only one respondent reported having a negative experience that would cause them not to return.

Welcome Center Supplemental Analysis

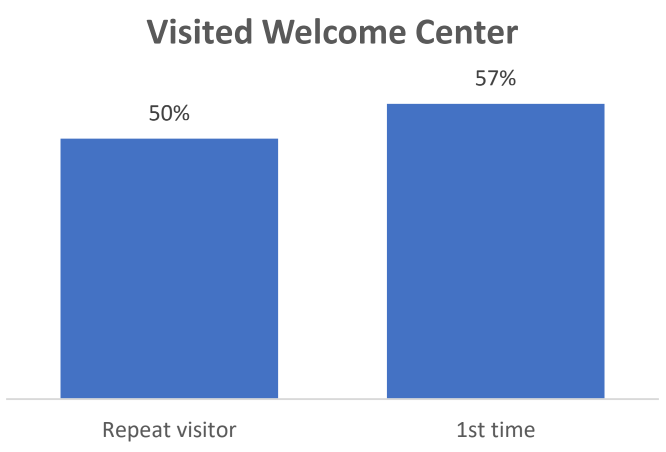
Visitor Profile Research – Winter 2019-20

GULF SHORES & ORANGE BEACH TOURISM
Alabama's White-Sand Beaches

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, since length of stay is often decided ahead of time. However, among both winter and fall visitors, we do see longer stays among Welcome Center visitors. So it could be that those who stay in the area longer have more opportunity to be exposed to the Welcome Center
- There is also higher Welcome Center visitation among first-time visitors, which makes sense among a population that is less familiar with the destination and is looking for ideas of things to do.
- Welcome Center visitors participated in more activities. This makes sense, given that activities and attractions are promoted at the centers.

Winter 2019-20 visits	No Welcome Center (a)	Visited Welcome Center (b)
Length of stay	5.2	7.8
# of activities on trip	5.3	8.9



Impact on Spending

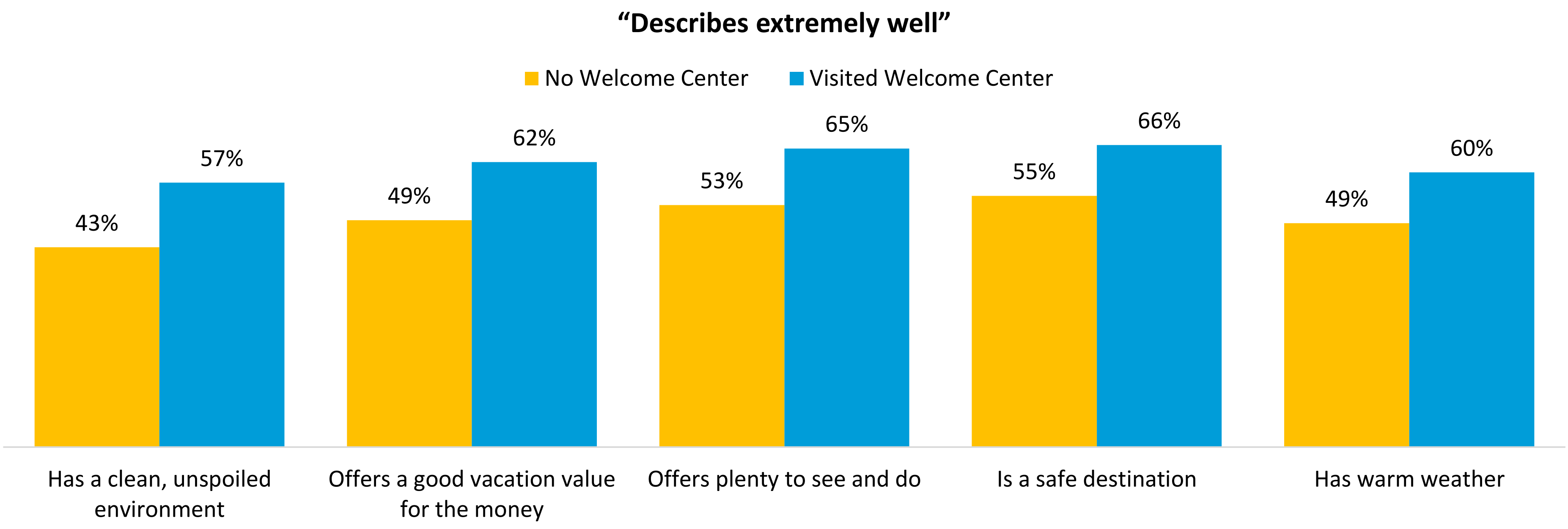
- Welcome Center visitors spent 8% more money in the destination on winter trips, particularly on recreation/ entertainment and transportation within the destination, which is similar to what we saw in the fall.
- While lodging decisions and length of stay are typically decided ahead of time, outings, shopping, and entertainment are often not pre-planned when visiting a place for leisure. So the Welcome Centers have more opportunity to impact these metrics.

Winter Trip Spending	No Welcome Center	Visited Welcome Center
Lodging	$928	$803
Meals/food/groceries	$297	$317
Shopping	$170	$241
Recreation or entertainment	$115	$202
Transportation within Gulf Shores	$30	$104
Other	$22	$24
Total	**$1,561**	**$1,691**

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.

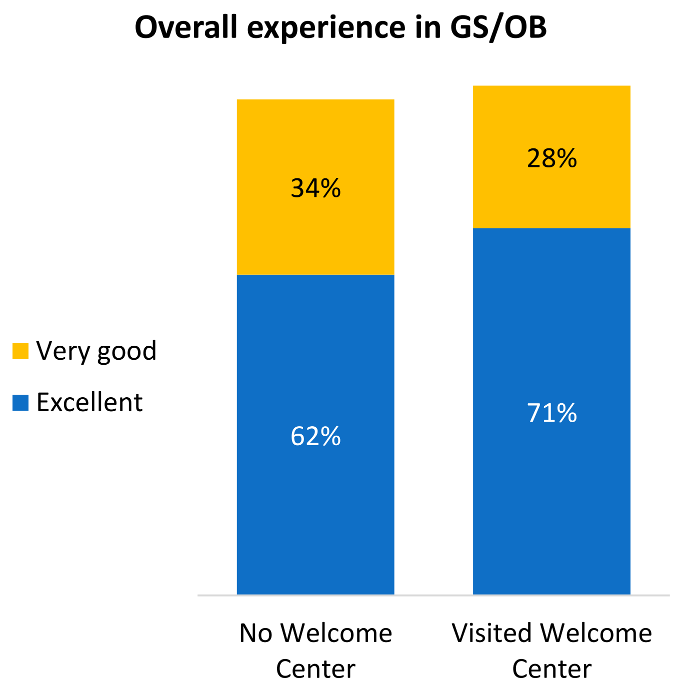
Impact on Image

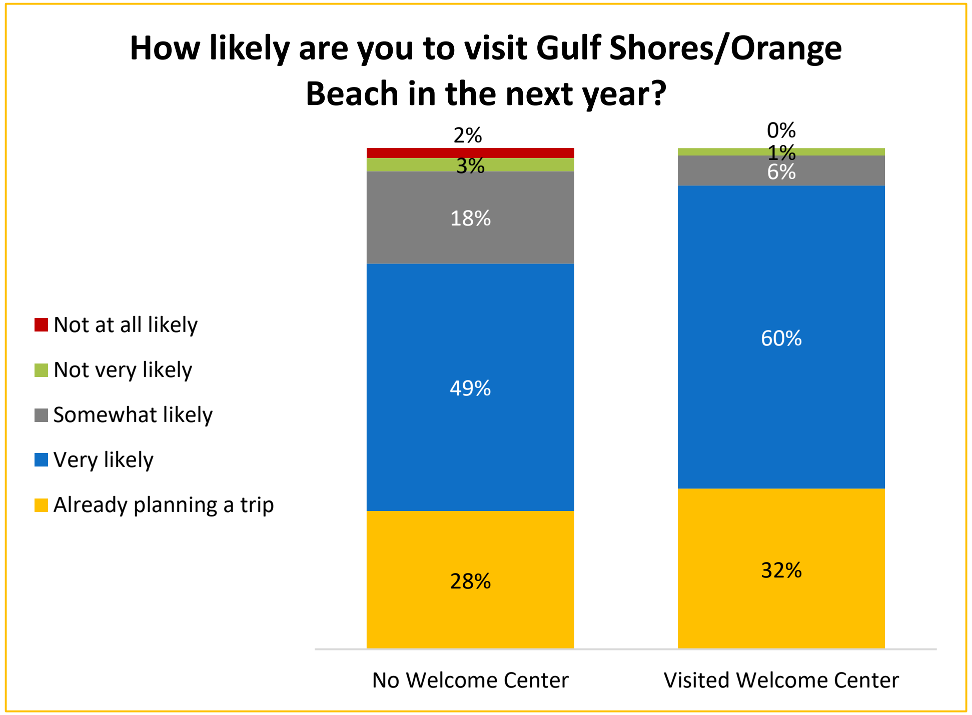
- Welcome Center visitors have higher agreement with statements describing GS/OB's clean, unspoiled environment, value, variety of things to see and do, safety, and weather.



Impact on Experience and Intent to Return

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





GULF SHORES & ORANGE BEACH TOURISM
Alabama's White-Sand Beaches

Appendix

Visitor Profile Research – Winter 2019-20

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 more than 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 WINTER Day trips	2017-18	2018-19	2019-20
Average # visits/year	3.8	3.6	4.6
First-time trips	41%	50%	29%

2017-18 day trip n=231; 2018-19 day trip n=6; 2019-20 day trip = 125

Comparing Target to Other Travelers

Began planning winter trip	2017-18		2018-19		2019-20	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
< 1 week before trip	10%	29%	6%	33%	8%	72%[a]
1-2 weeks	16%	16%	10%	17%	5%	6%
3 weeks - 1 month	28%	19%	22%	17%	13%	15%
2 - 3 months	24%	19%	35%	17%	40%[b]	6%
4-6 months	7%	7%	17%	0%	14%	0%
6+ months	15%	10%	10%	17%	21%	0%

GS/OB is only destination visited on this trip	2017-18		2018-19		2019-20	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
	82%	82%	84%	67%	89%	98%

2017-18 target n=554, day trip n=231; 2018-19 target n=401, day trip n=6; 2019-20 target n=438 (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	2017-18		2018-19		2019-20	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Family or friends	30%	32%	31%	50%	34%	56%[a]
Social media (Facebook, Instagram, etc.)	15%	13%	22%	17%	26%[b]	7%
Gulf Shores & Orange Beach Tourism website	13%	8%	21%	17%	30%[b]	7%
Traveler review sites or apps	11%	9%	23%	17%	22%[b]	6%
Alabama's official tourism website	10%	4%	10%	0%	4%	5%
Travel/visitor guide	13%	10%	15%	0%	7%	1%
Travel advice websites or apps	15%	10%	13%	17%	14%[b]	1%
Travel blogs	8%	7%	13%	17%	6%	1%
Advertisements (magazine, online, etc.)	10%	9%	5%	0%	2%	1%
Magazine and newspaper articles	6%	6%	3%	0%	2%	1%
Booking websites or apps (Orbitz, Expedia, etc.)	20%	14%	20%	17%	23%[b]	1%
Hotel websites	20%	19%	18%	0%	14%[b]	0%
Vacation home rental booking sites	39%	6%	43%	0%	50%[b]	0%

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.

2017-18 target n=554, day trip n=231; 2018-19 target n=401, day trip n=6; 2019-20 target n=438 (a), day trip n=125 (b)
a / b indicate statistically significant differences at the 95% level.

Comparing Target to Other Travelers

Children on trip	2017-18		2018-19		2019-20	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
% of trips with children	16%	5%	41%	0%	45%	13%
Of trips with children:	*2017-18 target n=13, day trip n=2; 2018-19 target n=143, day trip n=4; 2019-20 target n=197, day trip n=16*					
< 6 years old	29%	70%	58%	0%	37%	17%
6-11 years old	45%	40%	56%	0%	55%	83%
12-17 years old	57%	20%	53%	0%	43%	9%

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	2017-18		2018-19		2019-20	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Automobile	75%	71%	77%	83%	84%	98%
Airplane	3%	6%	0%	0%	1%	2%
Bus	20%	21%	20%	0%	14%	0%
Other*	2%	2%	2%	17%	0%	0%

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

2017-18 target n=554, day trip n=231; 2018-19 target n=401, day trip n=6; 2019-20 target n=438 (a), day trip n=125 (b)
a / b indicate statistically significant differences at the 95% level.
* Includes boat

Comparing Target to Other Travelers

	2017-18		2018-19		2019-20	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Travel party size	3.8	2.9	3.8	1.8	3.7	3.6

Trip spending	2017-18		2018-19		2019-20	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Lodging	$890	-	$944	-	$1,022	-
Meals/food/groceries	$389	$174	$460	$119	$362	$64
Shopping	$280	$170	$338	$113	$279	$71
Recreation or entertainment	$261	$124	$243	$14	$157	$41
Transportation within Gulf Shores	$94	$74	$271	$17	$63	$27
Other	$58	$9	$53	$4	$39	$6
TOTAL	$1,972	$636	$2,301	$266	$1,921	$209
Per-person spending	**$426**	**$214**	**$505**	**$148**	**$517**	**$58**

2017-18 target n=554, day trip n=231; 2018-19 target n=401, day trip n=6; 2019-20 target n=438 (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		2017-18		2018-19		2019-20	
		Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Gender	Male	35%	37%	26%	33%	42%	27%
	Female	65%	63%	74%	67%	58%	73%
Age	Average	44	42	44	49	42	44
Marital status	Married	76%	59%	73%	83%	76%	73%
	Divorced/Separated	9%	11%	6%	0%	6%	8%
	Widowed	2%	3%	1%	0%	1%	2%
	Single/Never married	12%	27%	20%	17%	17%	17%
HH income	Average	$98,432	$81,020	$132,804	$80,583	$137,357	$117,042

2017-18 target n=554, day trip n=231; 2018-19 target n=401, day trip n=6; 2019-20 target n=438 (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	2017-18		2018-19		2019-20	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Has beautiful beaches	98%	75%	91%	67%	92%	96%
Has nice weather	94%	76%	89%	67%	91%	93%
Has beautiful scenery	96%	71%	91%	67%	92%	91%
Has a "family-friendly" atmosphere	92%	73%	93%	83%	92%	91%
Has a variety of dining options at several price points	90%	69%	86%	67%	91%	91%
Offers a relaxing atmosphere	95%	75%	93%	67%	93%	89%
Has warm weather	94%	77%	91%	83%	90%	89%
Is a safe destination	94%	74%	92%	67%	91%	89%
Provides warm Southern hospitality	90%	77%	86%	67%	89%	84%
Has a variety of lodging options at multiple price points	86%	71%	89%	67%	88%	84%
Is easy to get to by car	88%	73%	87%	50%	88%	84%
Offers a good vacation value for the money	88%	69%	85%	67%	86%	82%
Offers plenty to see and do	94%	66%	89%	50%	94%	78%
Has a clean, unspoiled environment	86%	74%	83%	50%	88%	73%

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

2017-18 target n=554, day trip n=231; 2018-19 target n=401, day trip n=6; 2019-20 target n=438 (a), day trip n=125 (b)
a / b indicate statistically significant differences at the 95% level.

Comparing Target to Other Travelers

Overall experience	2017-18		2018-19		2019-20	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Top 2 Box Rating	**94%**	**55%**	**90%**	**83%**	**97%**	**100%**
5 (Excellent)	42%	28%	37%	50%	63%	76%
4 (Very good)	51%	27%	53%	33%	34%	24%
3 (Good)	6%	36%	9%	17%	3%	0%
2 (Fair)	0%	7%	1%	0%	0%	0%
1 (Poor)	0%	2%	0%	0%	0%	0%

Likelihood to recommend	2017-18		2018-19		2019-20	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Top 2 Box Rating	**95%**	**70%**	**96%**	**83%**	**92%**	**93%**
5 (Extremely likely)	72%	44%	64%	67%	70%	82%
4	22%	26%	32%	17%	22%	11%
3	5%	19%	4%	17%	6%	7%
2	0%	6%	0%	0%	1%	0%
1 (Not at all likely)	0%	4%	0%	0%	1%	0%

2017-18 target n=554, day trip n=231; 2018-19 target n=401, day trip n=6; 2019-20 target n=438 (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	2017-18		2018-19		2019-20	
	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)	**88%**	**64%**	**82%**	**67%**	**84%**	**89%**
5 (Already planning a trip)	34%	21%	36%	17%	30%	24%
4 (Very likely)	54%	42%	46%	50%	55%	64%
3 (Somewhat likely)	10%	25%	12%	33%	13%	11%
2 (Not very likely)	2%	6%	6%	0%	2%	0%
1 (Not at all likely)	0%	5%	0%	0%	1%	0%

During which season(s) would you be most likely to visit (of those likely to visit)	2017-18		2018-19		2019-20	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Spring	36%	25%	40%	67%	45%	69%
Summer	64%	57%	51%	33%	51%	69%
Fall	29%	29%	37%	17%	40%	44%
Winter	*28%*	*20%*	*38%*	*67%*	*35%*	*38%*

2017-18 target n=554, day trip n=231; 2018-19 target n=401, day trip n=6; 2019-20 target n=438 (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	2017-18		2018-19		2019-20	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Alabama	15%	6%	11%	-	42%	35%
Florida	17%	26%	14%	33%	11%	42%
Georgia	5%	10%	10%	-	4%	4%
Illinois	3%	2%	15%	-	2%	2%
Indiana	2%	3%	4%	-	2%	-
Kentucky	6%	2%	-	-	1%	-
Louisiana	7%	6%	11%	-	8%	-
Michigan	5%	1%	7%	-	2%	-
Missouri	3%	3%	6%	-	2%	-
Mississippi	8%	3%	1%	17%	7%	6%
Ohio	3%	6%	-	-	1%	-
Oklahoma	2%	1%	-	-	1%	-
Tennessee	6%	6%	7%	-	4%	-
Texas	12%	16%	8%	33%	3%	-
Wisconsin	4%	3%	6%	-	2%	2%

2017-18 target n=554, day trip n=231; 2018-19 target n=401, day trip n=6; 2019-20 target n=438 (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)	2017-18		2018-19		2019-20	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Dining out	52%	30%	61%	33%	73%	31%
Beaches	64%	32%	66%	17%	55%	25%
Shopping	41%	23%	50%	50%	50%	23%
Shelling	18%	6%	21%	0%	12%	23%
Relaxing	49%	31%	56%	50%	58%	13%
Exercise/Working out	12%	7%	18%	0%	9%	11%
Sporting events	1%	3%	3%	0%	8%	6%
Swimming	27%	20%	30%	0%	30%	5%
Sightseeing	40%	18%	41%	17%	35%	1%
Birdwatching	9%	4%	6%	0%	4%	1%
Watching wildlife	22%	12%	17%	17%	10%	1%
Boating or sailing	8%	8%	11%	0%	5%	1%
Historical sites	12%	11%	15%	17%	4%	1%
Bicycle riding	7%	9%	13%	33%	10%	1%
Golfing	5%	5%	9%	0%	4%	1%
Tennis	9%	4%	3%	0%	2%	1%
Visiting friends/relatives who live in the area	12%	10%	20%	17%	12%	0%
Hiking on trails	12%	11%	19%	0%	12%	0%
Photography	16%	10%	16%	0%	17%	0%
Family/friends reunion	18%	8%	15%	0%	3%	0%
Dolphin tour	11%	8%	14%	0%	22%	0%
Concerts and nightlife	9%	0%	13%	0%	8%	0%
Festivals or special events (non-sports events)	7%	5%	12%	0%	4%	0%
Fishing	14%	12%	11%	0%	13%	0%
Kayaking/Canoeing/Paddle boarding	13%	4%	11%	0%	7%	0%
Visiting a spa	8%	5%	9%	0%	7%	0%
Scuba diving/Snorkeling	7%	4%	6%	0%	5%	0%
Parasailing/Jet skiing	5%	2%	4%	0%	3%	0%

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

2017-18 target n=554, day trip n=231; 2018-19 target n=401, day trip n=6; 2019-20 target n=438 (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)	2017-18		2018-19		2019-20	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
OWA Park	5%	2%	5%	0%	12%	27%
The Wharf	14%	6%	27%	0%	28%	12%
Tanger Outlets	7%	7%	27%	17%	28%	11%
Battleship USS Alabama	7%	3%	12%	0%	11%	6%
Gulf State Park	8%	6%	26%	0%	15%	5%
Alabama’s Coastal Connection Scenic Byway	5%	3%	15%	0%	9%	1%
Adventure Island	5%	3%	13%	0%	11%	0%
National Naval Aviation Museum	7%	5%	14%	0%	2%	0%
Alabama Gulf Coast Zoo	3%	3%	14%	0%	4%	0%
Fort Morgan Historic Site	9%	2%	12%	0%	5%	0%
Dauphin Island	11%	6%	11%	0%	6%	0%
Bon Secour National Wildlife Refuge	9%	3%	10%	0%	4%	0%
The Track	3%	2%	6%	0%	4%	0%
Waterville	7%	3%	5%	0%	1%	0%
Hugh S. Branyon Backcountry Trail	3%	0%	3%	0%	7%	0%
Bellingrath Gardens	5%	2%	3%	0%	4%	0%

2017-18 target n=554, day trip n=231; 2018-19 target n=401, day trip n=6; 2019-20 target n=438 (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.