GULF SHORES & ORANGE BEACH TOURISM

Alabama's White-Sand Beaches

Visitor Profile Research

Summer 2020

Strategic Marketing & Research Insights LLC

Table of Contents

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

Introduction

Visitor Profile Research – Summer 2020

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.
- With travel restrictions in place since late March 2020 due to COVID-19, many destinations were closed or had limited availability during spring and portions of the summer season. GS/OB reopened beaches and Welcome Centers April 30. Leisure travel has remained low globally during this period. There is evidence of recovery, but it is happening at varying rates around the country.
- This report is the second of three seasonal reports for 2020; the spring wave was not conducted due to very low visitation.
- In addition to the typical objectives of the quarterly research (outlined on the following page), this wave of research looked at visitor behavior relative to the pandemic travel restrictions, and at those who came to the area because their usual beach destination was closed.

Research Objectives

Gather information on summer visitors, determining visitor origins and demographics

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

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

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

Compare data gathered from recent travelers to those who came to the area in prior summers

Explore new visitors to the area, to identify demographic and motivational differences compared to repeat visitors

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

Methodology

- This report presents information collected through online surveys of visitors to Gulf Shores, Orange Beach or Fort Morgan during summer 2020 (June through August).
- Potential respondents were screened to ensure they were travelers to the Gulf Shores/Orange Beach area and were at least 25 years of age.
- Travelers were asked about multiple trips.
- Target data is weighted to match the destination's actual occupancy rates (hotel and vacation rental) over the relevant time period, which in summer 2020 was 86% condo/vacation rentals and 14% hotel stays.
- Surveys were conducted in the markets where UberMedia's mobile data indicated were home markets for devices that spent time in the Gulf Shores/Orange Beach area during the summer months.

Number of trips represented in the data	Summer 2020
Target trips (stayed 1-30 nights in paid accommodations)	401
Non-target trips (visited but did not stay overnight)	100

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 277,369 unique non-resident devices that entered the defined GS/OB area during summer 2020. (Unique meaning that if the same device was in GS/OB on multiple occasions, it was only counted once). These devices identified the markets in which SMARInsights surveyed to find summer visitors.

Accuracy and Limitations of Mobile Location Data

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

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

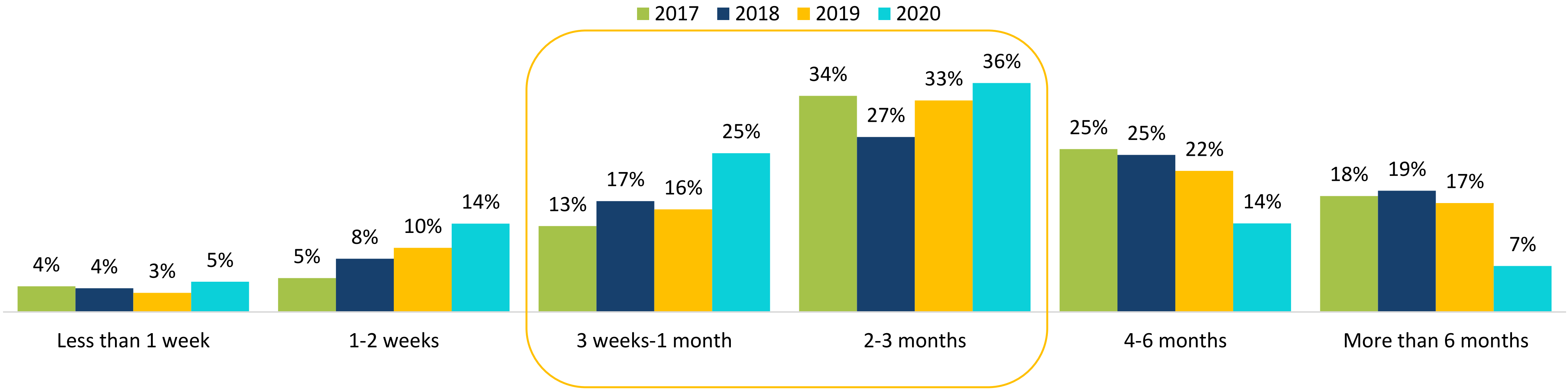
Detailed Findings

Visitor Profile Research – Summer 2020

Travel Planning

- More than 60% of summer 2020 trips were planned between 3 weeks and 3 months ahead of travel. This is a shift from prior summers, when the planning horizon was somewhat longer. Given that the destination was closed from late March through April, and there was uncertainty around visiting some destinations, visit planning had to be pushed closer to the trip.

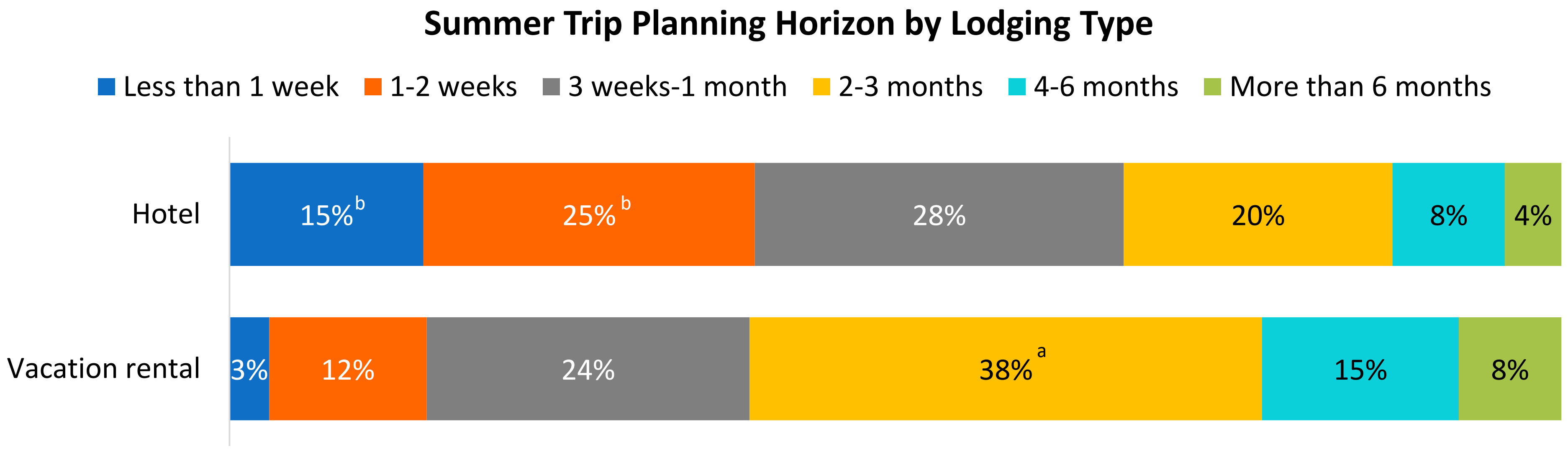
How far in advance did you begin planning your trip to Gulf Shores/Orange Beach?



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

Travel Planning – Hotel vs. Condo Rental

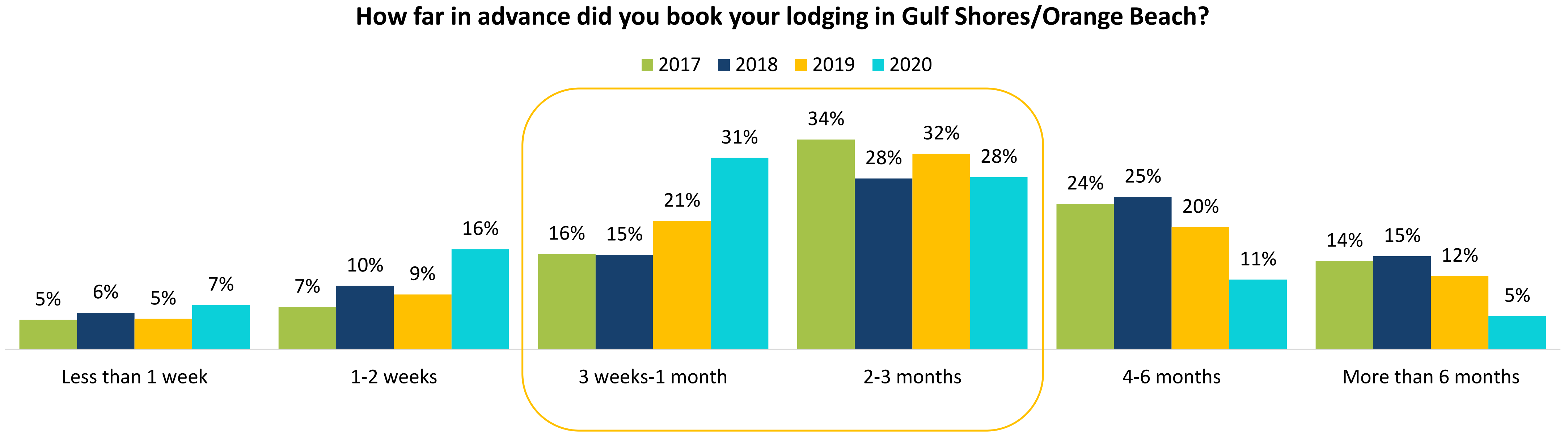
- Hotel stayers continue to plan in the short term, versus those who stay in condos. However, where summer 2019 saw just over a third of hotel trips planned in under a month, in summer 2020 more than two-thirds of hotel trips were planned in a month or less.



Vacation rental/condo n=188 (a); Hotel/motel n=213 (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

- As with trip planning overall, lodging bookings shifted earlier; half of bookings were made 3 weeks to 3 months ahead of travel.
- These parallel time frames suggest that planning and booking happen simultaneously for many travelers. With spring trips needing to be postponed due to COVID-19, once travelers decided it was safe to visit, they likely did the planning and booking steps all at once.

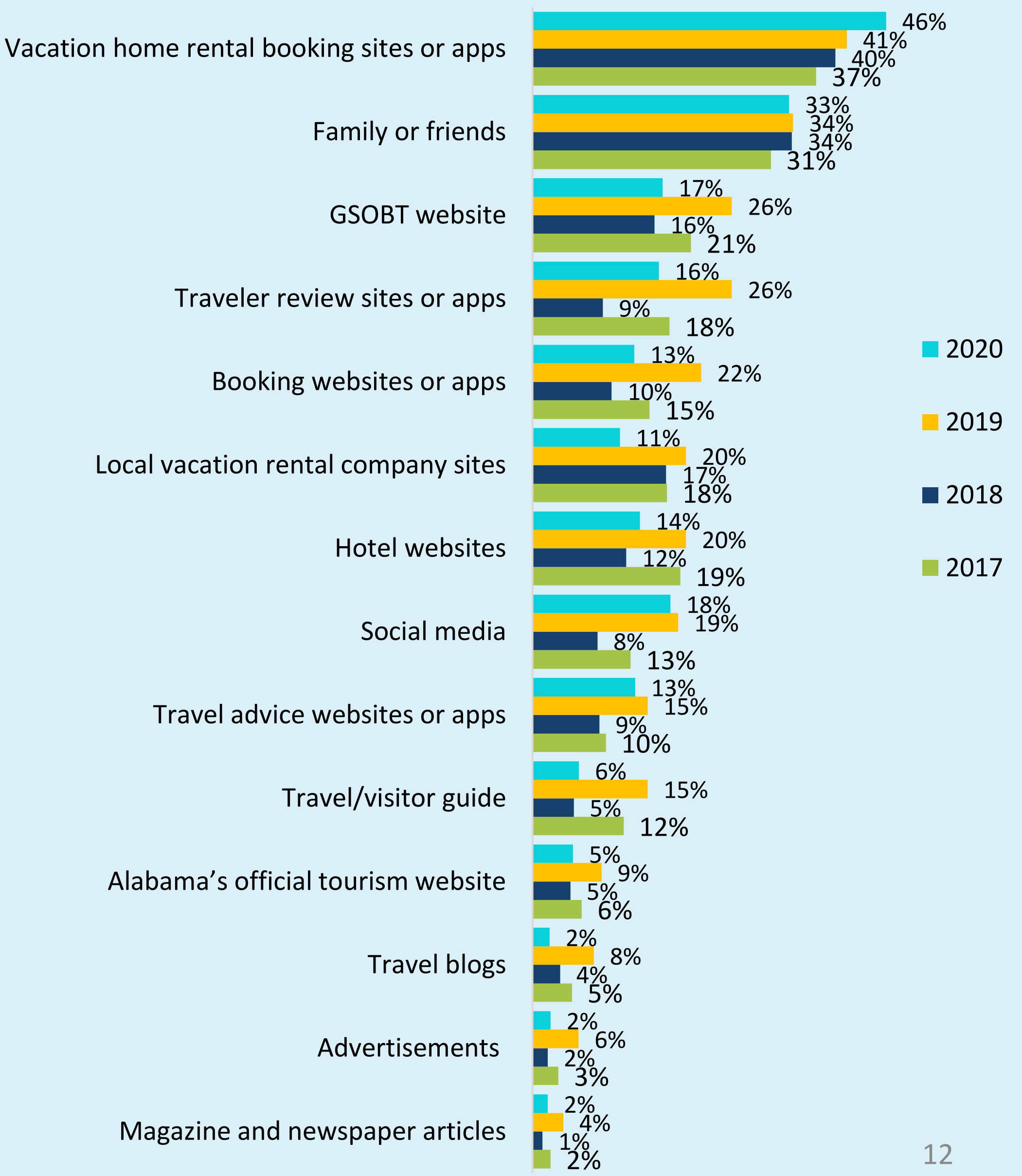


Question text: How far in advance did you book your lodging in Gulf Shores/Orange Beach? Response options as shown in graph.

Travel Planning – Resources

- The top summer visit planning resources remain vacation home rental sites/apps and family and friends.
- Compared to last summer, there was an increase in usage of vacation home rental booking sites/apps. This may be due in part to more of these resources coming online.
- Reliance on family and friends, social media, and travel advice websites and apps remained steady year-over-year. The remaining resources were used less this year than in prior summers.

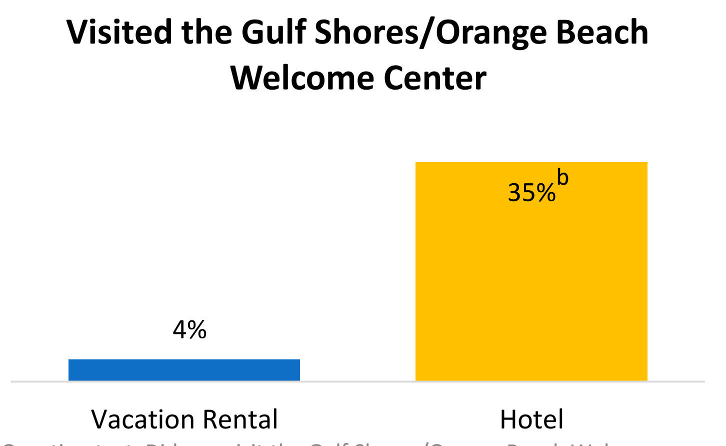
Which of the following resources did you use to plan your trip to Gulf Shores/Orange Beach?



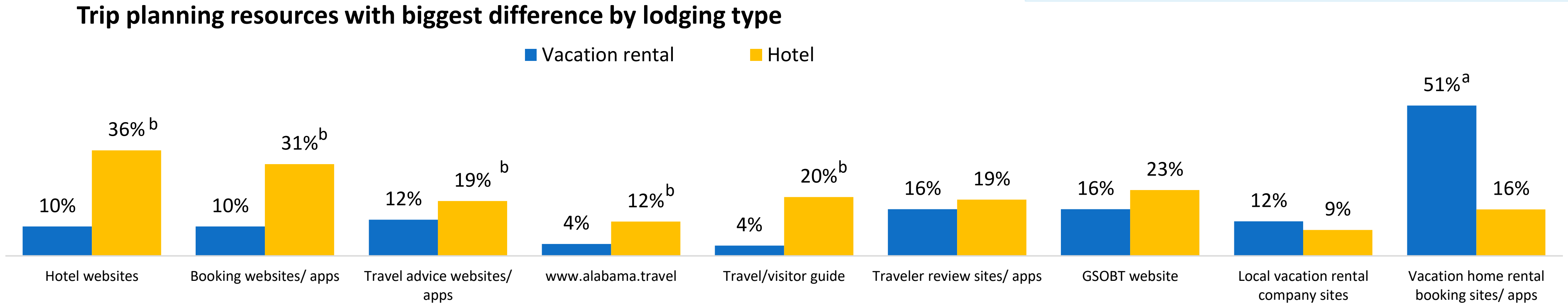
Question text: Which of the following resources did you use to plan your trip to Gulf Shores/Orange Beach? Response options as shown in graph.

Travel Planning – Hotel vs. Condo Rental

- Difference in travel planning resources by lodging type are similar to prior summers.
- The one-third of hotel stayers who visit the Welcome Center are also in line with summer 2019.
- However, last summer 23% of condo stayers visited the Welcome Center; this number dropped to just 4%. This may be a reflection of visitors being more cautious about visiting indoor spaces. By virtue of them staying in a hotel, we know that hotel stayers have less concern about common indoor spaces, so their behavior did not change. Condo stayers, by contrast, may have chosen that lodging type in order to avoid in-person interactions.



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

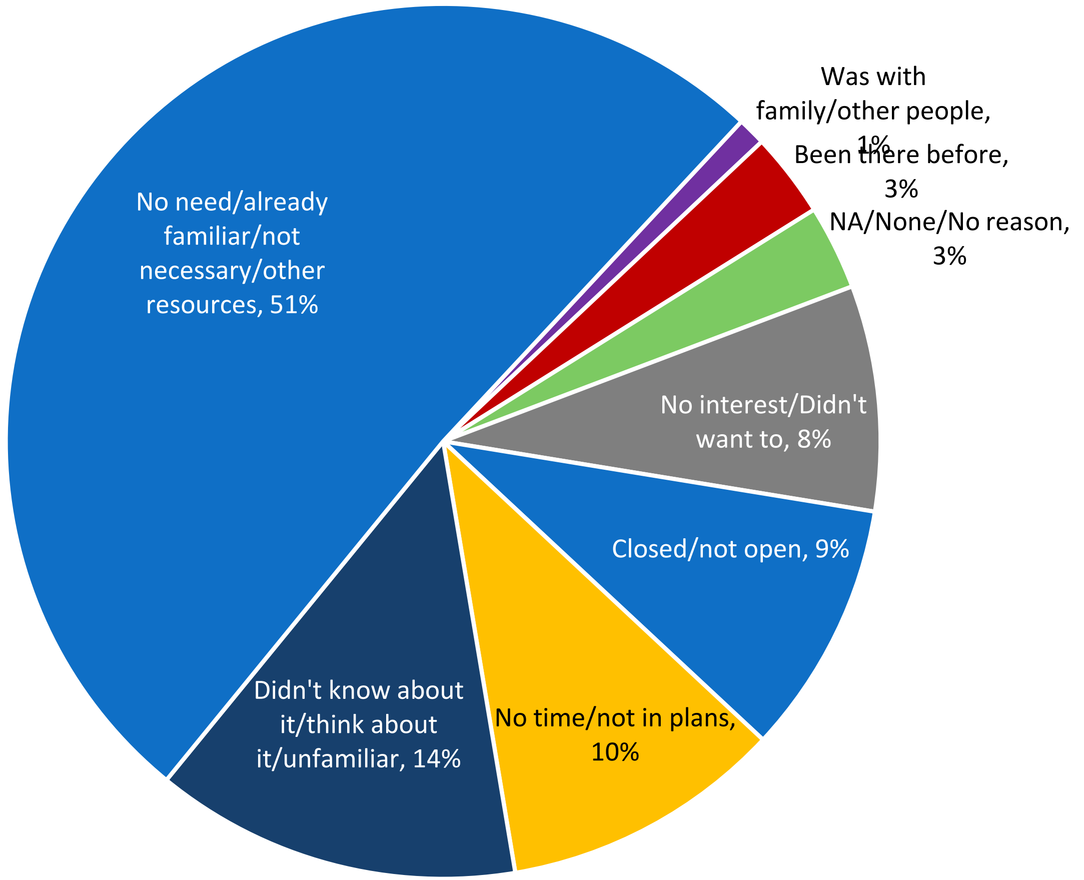


Vacation rental/condo n=188 (a); Hotel/motel n=213 (b); a / b indicate statistically significant differences at the 95% level.
Question text: Which of the following resources did you use to plan your trip to Gulf Shores/Orange Beach? ? Response options as shown in graph.

Travel Planning

- Of those who did not visit a Welcome Center, the most common reason remains already being familiar with the destination.

Why didn't you visit the Welcome Center?

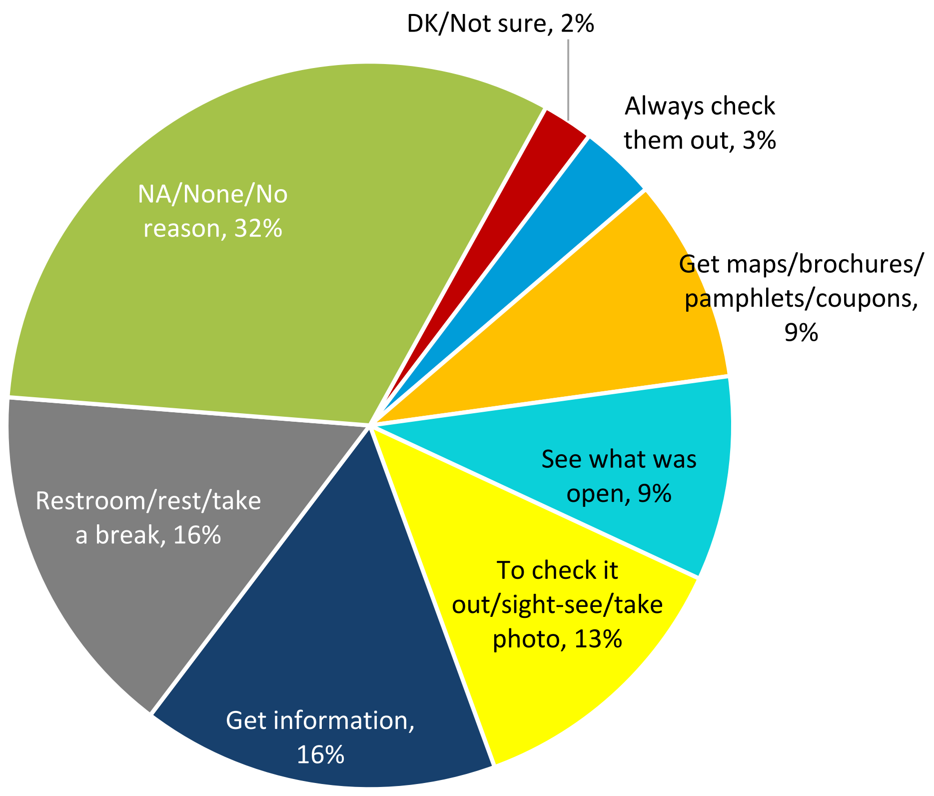


Question text: Why didn't you visit the welcome center? [open ended response]

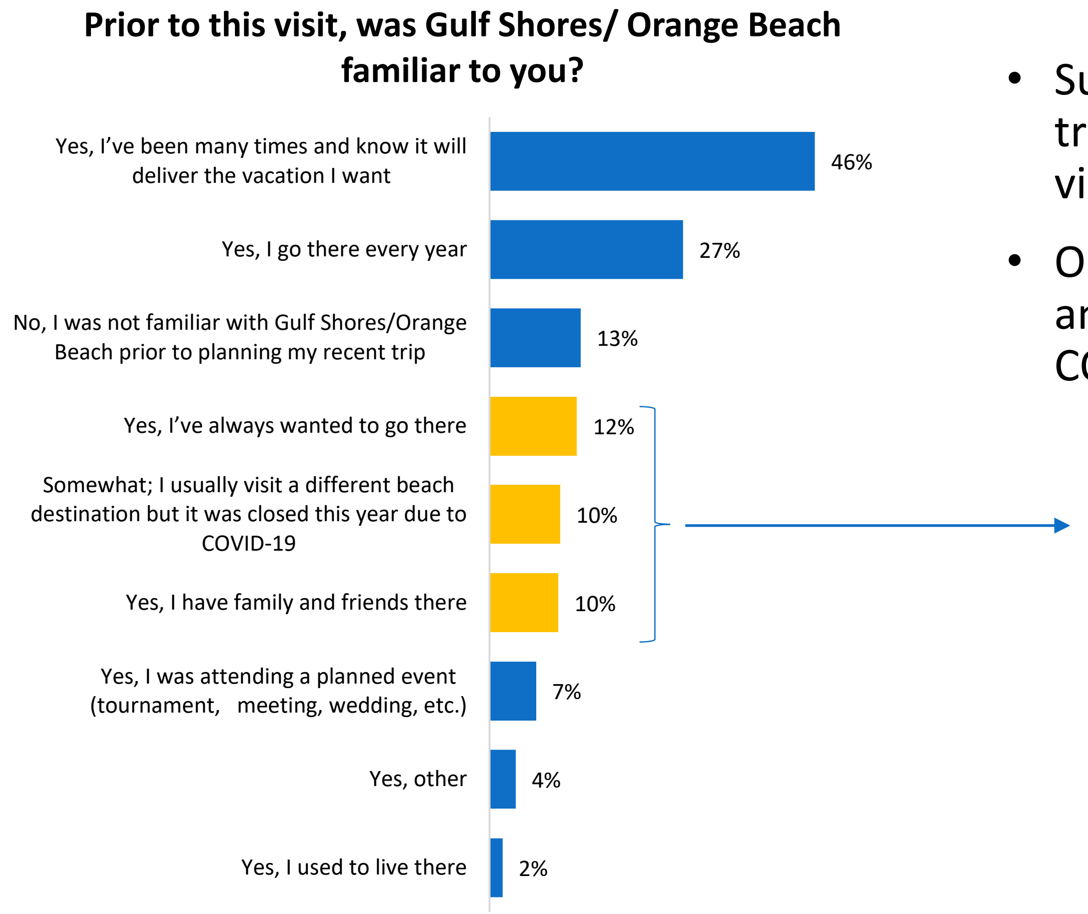
Travel Planning – Welcome Center Visitors

- Nine percent of those who stopped at the Welcome Center did so to find out what was open in the area. This is not a response we typically see, and it highlights an important role of CVBs during this unusual time, as visitors and potential visitors seek information on what experiences and services are available.

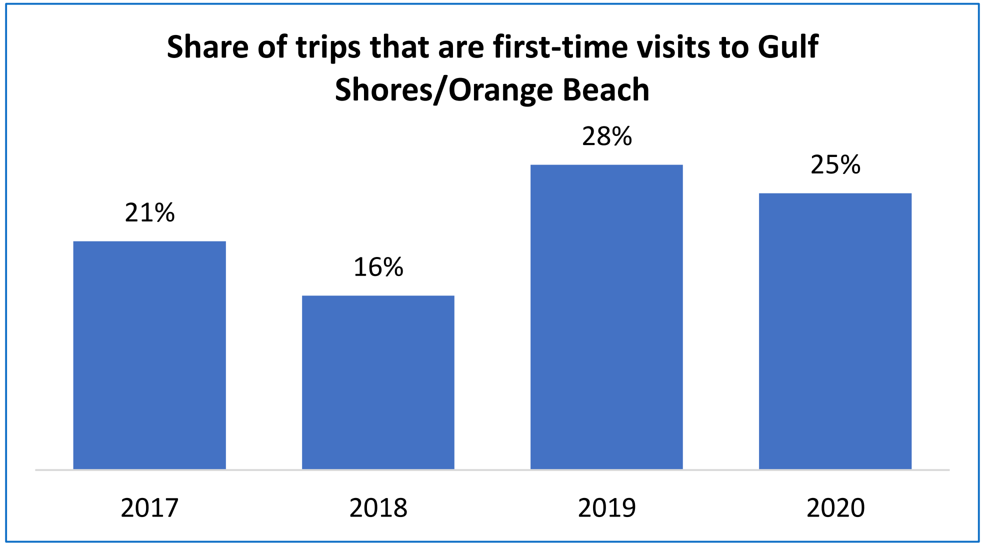
Why did you visit the welcome center?



Trip Characteristics



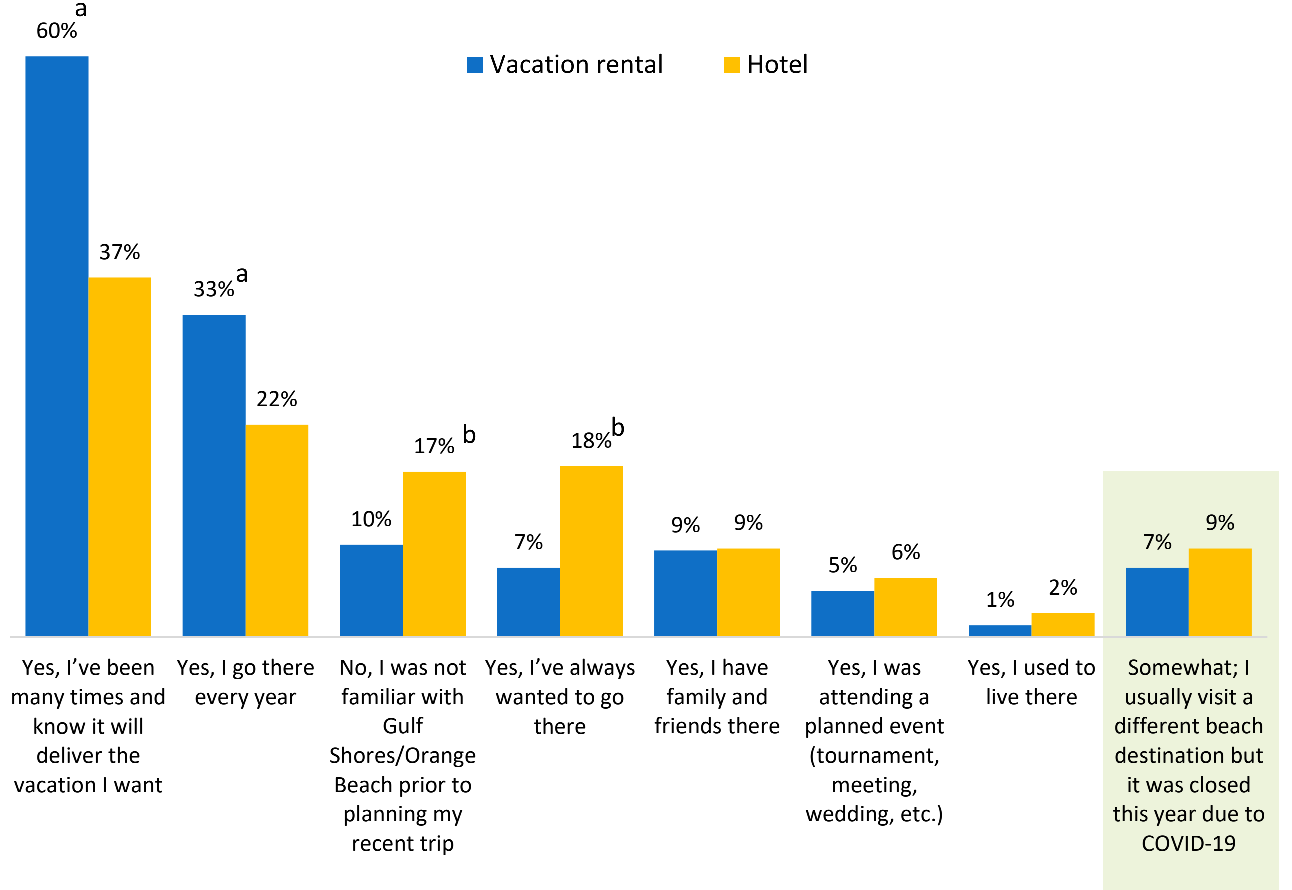
- Summer 2019 saw a lift in first-time visitors, and that trend continued this year. A quarter of summer 2020 visitors had not been to GS/OB before.
- One in 10 summer 2020 visitors typically visit another beach that was closed this year due to COVID-19.



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 new visitors. COVID-19 closures drove new visitors in fairly equal shares to each lodging type.

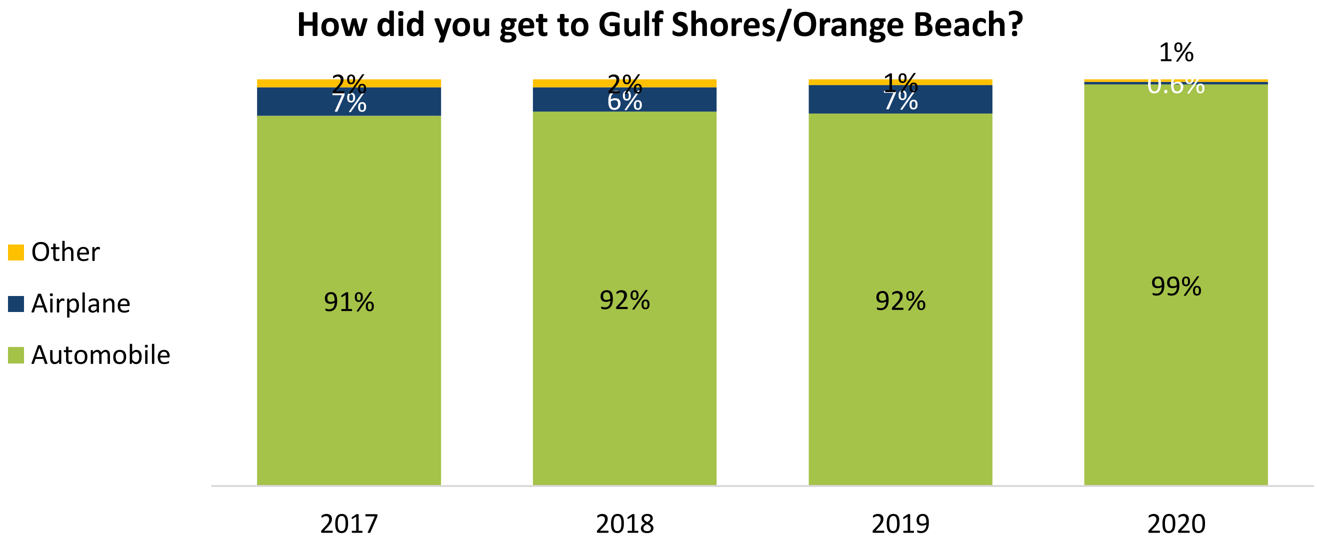
Differences in Reasons for Familiarity



Vacation rental/condo n= 188 (a); Hotel/motel n=213 (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.

Trip Characteristics

- As in prior summers, most visitors drove. This year due to concerns about virus transmission and fewer flights being available, very few visitors flew to the destination.
- From a very small sample of fly visitors, most flew into Pensacola.



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

Trip Characteristics

- Beach usage is consistent with prior years, as are the general and outdoor activities of dining out, relaxing, and swimming.
- In fact, there is an uptick in swimming, while shopping, sightseeing, and individual attractions are lower this year.
- Some of this relates to availability of these attractions.

Summer trip participation	2017	2018	2019	2020
Beaches	82%	80%	81%	80%
Dining out	64%	62%	67%	66%
Relaxing	63%	58%	65%	63%
Swimming	64%	59%	58%	64%
Shopping	55%	46%	54%	43%
Sightseeing	28%	30%	37%	21%
Tanger Outlets	30%	30%	32%	22%
The Wharf	23%	18%	28%	16%
Shelling	17%	19%	19%	15%
Watching wildlife	8%	11%	16%	10%
Exercise/Working out	14%	15%	15%	10%
Adventure Island	11%	12%	15%	3%
Fishing	13%	14%	14%	14%
Dolphin tour	11%	10%	14%	10%
Alabama's Coastal Connection	8%	5%	14%	8%
Dauphin Island	10%	6%	13%	8%
Historical sites	8%	6%	13%	4%
Gulf State Park	11%	11%	13%	12%
Alabama Gulf Coast Zoo	9%	5%	13%	6%
Hiking on trails	6%	3%	12%	7%
The Track	10%	9%	12%	8%
Visiting friends/family in area	7%	11%	12%	8%
Photography	12%	13%	12%	7%
Fort Morgan Historic Site	9%	3%	12%	6%
Battleship USS Alabama	10%	5%	12%	6%
Boating or sailing	11%	12%	11%	11%

Cont'd.	2017	2018	2019	2020
Golfing	6%	5%	10%	3%
Concerts and nightlife	7%	2%	9%	4%
Birdwatching	4%	3%	9%	3%
Kayaking/Canoeing/Paddle boarding	7%	5%	8%	5%
National Naval Aviation Museum	6%	1%	8%	2%
Family/friends reunion	7%	10%	8%	8%
Visiting a spa	5%	5%	8%	3%
Bicycle riding	5%	6%	7%	4%
Festivals or special events	4%	1%	7%	2%
Waterville	8%	7%	7%	3%
Parasailing/Jet skiing	9%	6%	6%	5%
Tennis	3%	3%	6%	2%
Bon Secour National Wildlife Refuge	3%	1%	5%	3%
Scuba diving/Snorkeling	5%	5%	5%	4%
OWA Park	1%	2%	4%	4%
Sporting events	4%	5%	3%	3%
Hugh S. Branyon Backcountry Trail	2%	0%	3%	1%
Bellingrath Gardens	2%	2%	3%	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.

Trip Characteristics

- Due to widespread closures of a number of attractions and activities across destinations in summer 2020, an option was added to the trip activities to allow respondents to select which, if any, they had wanted to participate in but were unable due to it being closed.
- Most summer visitors experienced no such issues. Of those who did, the most frequent were concerts and nightlife, dining out, the zoo, dolphin tours, and the USS Alabama.

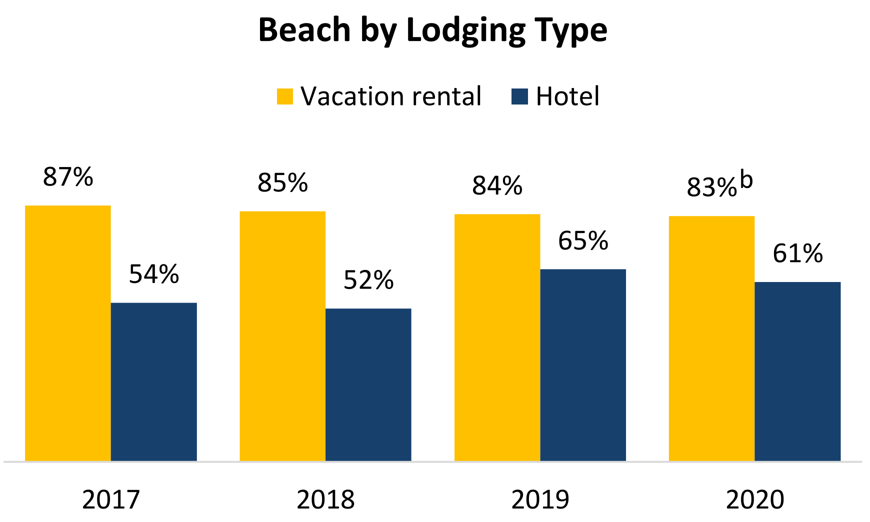
	Went to	Wanted to but was closed
None of these	3%	61%
Concerts and nightlife	4%	8%
Dining out	66%	8%
Alabama Gulf Coast Zoo	6%	7%
Dolphin tour	10%	6%
Battleship USS Alabama	6%	6%
Tanger Outlets	22%	4%
National Naval Aviation Museum	2%	4%
Visiting a spa	3%	4%
Festivals or special events	2%	3%
The Wharf	16%	3%
Historical sites	4%	3%
Adventure Island	3%	3%
OWA Park	4%	3%
Fishing	14%	3%
Fort Morgan Historic Site	6%	2%
Shopping	43%	2%
Gulf State Park	12%	2%
The Track	8%	2%
Beaches	80%	2%
Visiting friends/relatives in the area	8%	2%
Parasailing/Jet skiing	5%	2%
Waterville	3%	2%
Hiking on trails	7%	2%
Bon Secour National Wildlife Refuge	3%	2%
Sporting events	3%	1%
Exercise/Working out	16%	1%
Boating or sailing	11%	1%

	Went to	Wanted to but was closed
Kayaking/Canoeing/Paddle boarding	5%	1%
Swimming	64%	1%
Bellingrath Gardens	2%	1%
Dauphin Island	8%	1%
Alabama's Coastal Connection Scenic Byway	8%	1%
Scuba diving/Snorkeling	4%	1%
Shelling	15%	1%
Family/friends reunion	8%	1%
Golfing	4%	1%
Hugh S. Branyon Backcountry Trail	1%	1%
Birdwatching	3%	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.

Trip Characteristics

- As we typically see, vacation renters are more likely to feature beach visits in their trip.
- Directionally, beaches are also the leading motivator of visits from hotel stayers. Their top activities, like among vacation renters, are beaches, relaxing, dining out, and swimming.

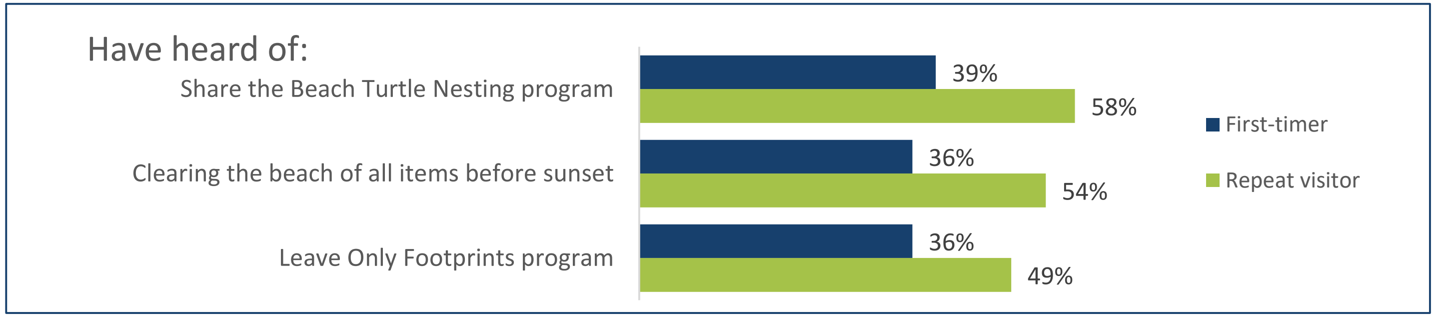


Question text: What attractions and activities did you visit or participate in while in Gulf Shores/Orange Beach on your trip? Response chosen: beach
Condo/vacation rental 2019 n= 188 (a); Hotel/motel n=213 (b)
a / b indicate statistically significant differences at the 95% level.

Trip Characteristics

- Seven in 10 summer 2020 visits were motivated by the beach, just as in the last several years. This reinforces the importance of protecting and preserving this important asset, as GSOBT has done with its Leave Only Footprints program and other initiatives.
- About half of repeat visitors and only a third of first-time visitors had heard of these programs this summer.

Summer trip motivators	2017	2018	2019	2020
Beaches	75%	73%	73%	71%
Relaxing	41%	40%	40%	40%
Swimming	28%	28%	19%	27%
Dining out	24%	25%	31%	17%
Shopping	14%	17%	13%	9%
Tanger Outlets	8%	10%	12%	8%
Family/friends reunion	5%	8%	5%	5%
Fishing	5%	5%	7%	5%
Visiting friends/relatives who live in the area	6%	7%	6%	4%
Boating or sailing	4%	5%	4%	4%



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

Trip Characteristics

- Summer trip spending is down, due to shorter stays and some curtailing of experiences due to availability and consumer caution. The spending decrease is true of both condo and hotel stays.

Average Travel Party Expenditures per Trip – SUMMER	2017		2018		2019		2020	
	Spending	% of total	Spending	% of total	Spending	% of total	Spending	% of total
Lodging	$1,606	59%	$1,408	59%	$1,272	56%	$1,234	59%
Meals/food/ groceries	$471	17%	$410	17%	$415	18%	$397	19%
Shopping	$294	11%	$266	11%	$275	12%	$207	10%
Recreation or entertainment	$242	9%	$173	7%	$203	9%	$167	8%
Transportation within Gulf Shores	$64	2%	$64	3%	$58	3%	$48	2%
Other	$65	2%	$54	2%	$58	3%	$44	2%
TOTAL	$2,741		$2,375		$2,280		$2,097	

2017 n=585; 2018 n=377; 2019 n=500; 2020=401

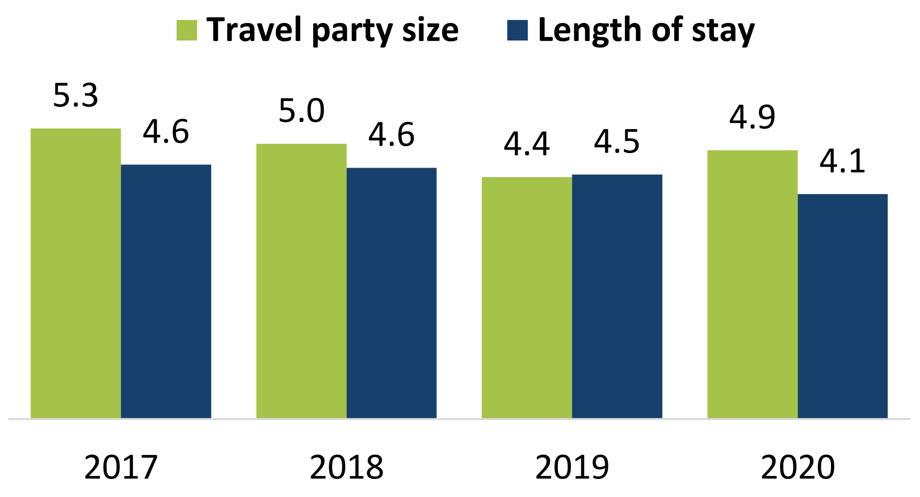
Average Travel Party Expenditures per Trip – SUMMER	2017		2018		2019		2020	
	Vacation rental	Hotel	Vacation rental	Hotel	Vacation rental	Hotel	Vacation rental	Hotel
Lodging	$1,809	$499	$1,548	$503	$1,429	$519	$1,363 [a]	$504
Meals/food/groceries	$508	$267	$434	$260	$441	$290	$422 [a]	$258
Shopping	$308	$219	$268	$254	$278	$260	$210	$193
Recreation or entertainment	$255	$173	$172	$178	$203	$207	$166	$170
Transportation within Gulf Shores	$59	$90	$61	$81	$53	$85	$38	$104 [b]
Other	$48	$157	$57	$40	$42	$131	$39	$74 [b]
TOTAL	$2,986	$1,405	$2,540	$1,315	$2,445	$1,492	$2,237	$1,303

Condo/vacation rental 2017 n=721; 2018 n=369; 2019 n=200; 2020 n=188
Hotel/motel 2017 n=145; 2018 n=63; 2019 n=300; 2020 n=213
Due to the small sample size of 2018 hotel/motel, these figures are presented as directional indicators.

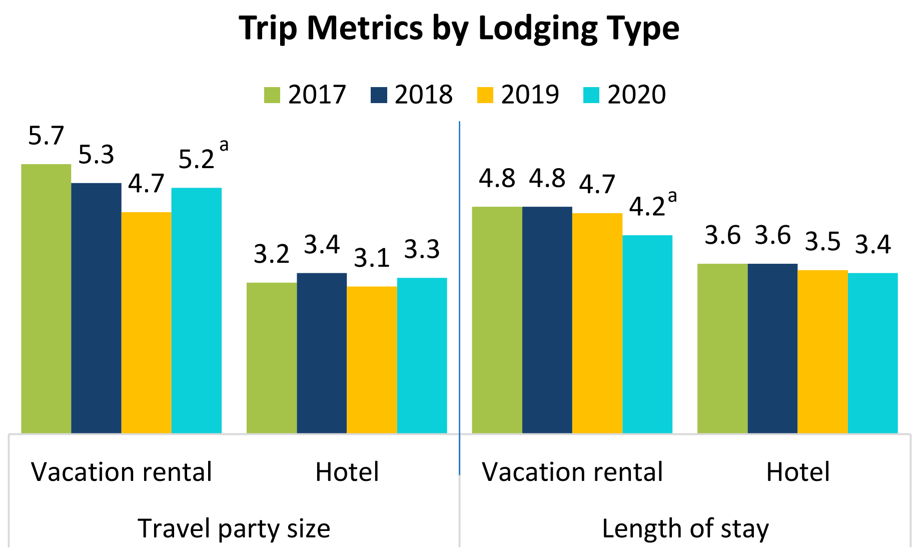
Question text: To help us better understand the economic impact of tourism, what was the approximate amount of money your travel party spent while in Gulf Shores/Orange Beach on your trip? [Category prompts] Open-ended numeric responses.

Travel Party Characteristics

- Summer 2020 travel parties were larger than in 2019; this is true of both lodging types. Travel parties are in line with 2018 figures.
- Stays were shorter though. Condo stayers spent about half a day less in Gulf Shores/Orange Beach this summer compared to last. Hotel stays were a little briefer, but there was less of a drop.
- Despite shorter stays and larger travel parties, person-nights remains at 20, which is in line with summer 2019.



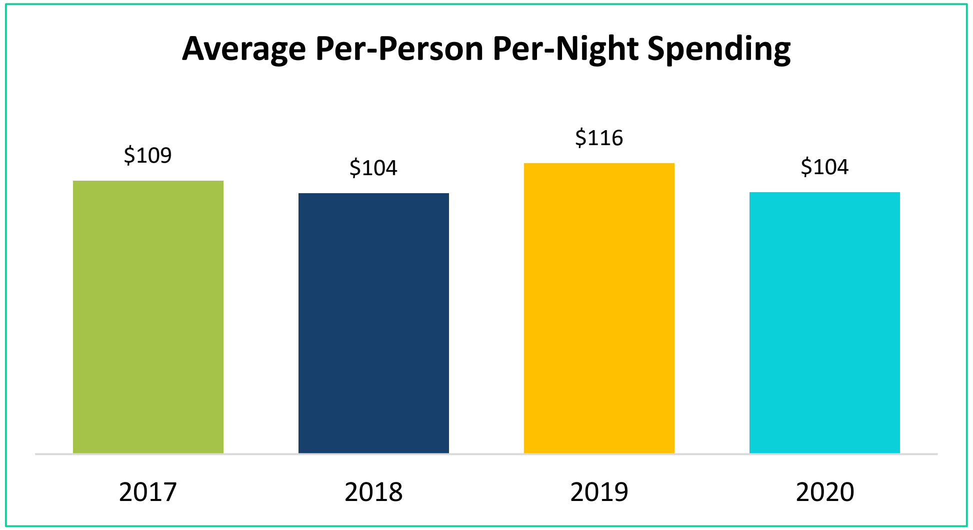
Question text: Including yourself, how many people were in your travel party? How many nights did you stay in Gulf Shores/Orange Beach during this trip? If you did not stay overnight, please enter '0'. Open-ended numeric responses.

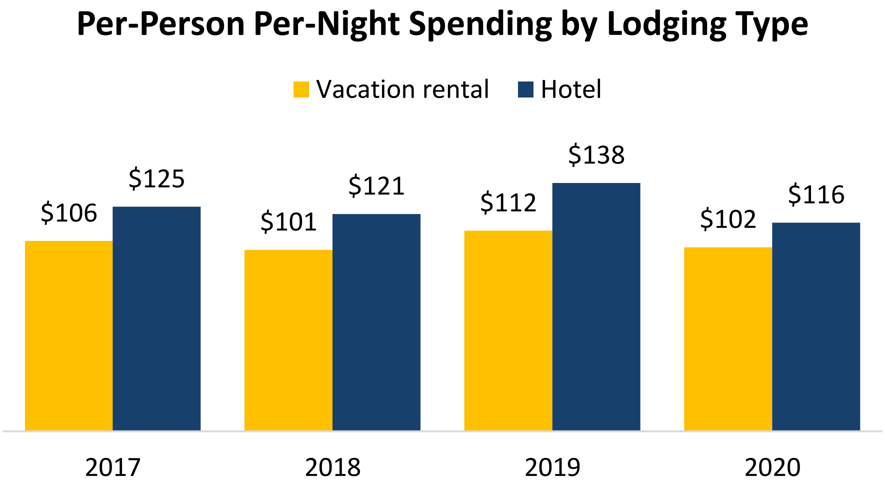


Condo/vacation rental 2017 n=721; 2018 n=369; 2019 n=200; 2020 n=188
Hotel/motel 2017 n=145; 2018 n=63; 2019 n=300; 2020 n=213
Due to the small sample size of 2018 hotel/motel stayers, these figures are presented as directional indicators.

Trip Characteristics

- Unit spending, like travel party size, is in line with 2018 figures, and lower than in 2019. This is true of condo stays as well. However, hotel stays saw their lowest per-person per-night trip spending to date.

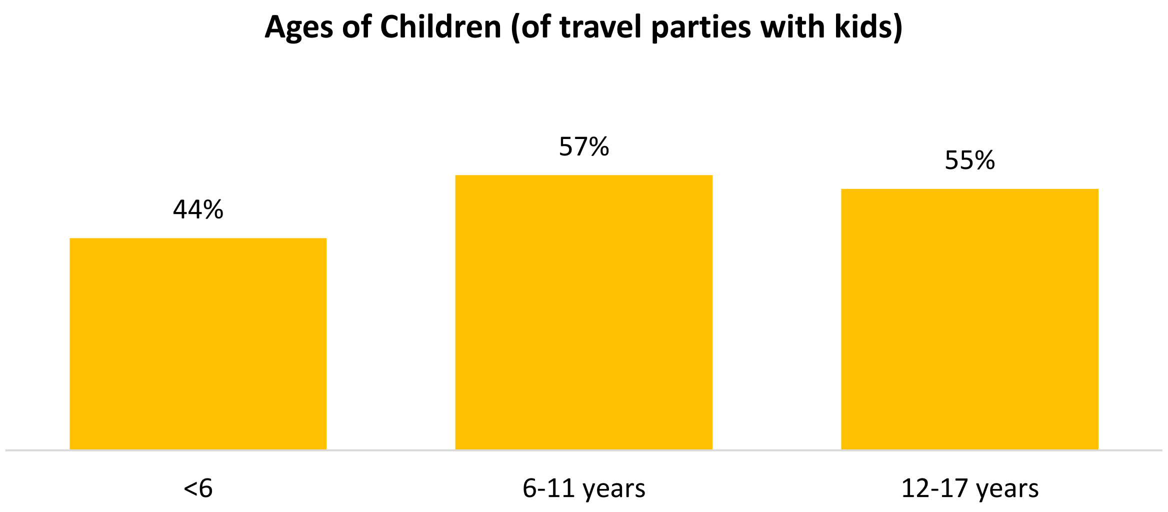




Question text: To help us better understand the economic impact of tourism, what was the approximate amount of money your travel party spent while in Gulf Shores/Orange Beach on your trip? [Category prompts]
Including yourself, how many people were in your travel party? How many nights did you stay in Gulf Shores/Orange Beach during this trip? If you did not stay overnight, please enter '0'. Open-ended numeric responses.
Condo/vacation rental 2017 n=721; 2018 n=369; 2019 n=200; 2020 n=188
Hotel/motel 2017 n=145; 2018 n=63; 2019 n=300; 2020 n=213
Due to the small sample size of 2018 hotel/motel stayers, these figures are presented as directional indicators.

Travel Party Characteristics

- As we saw in summer 2019, 6 in 10 summer travel parties include children.
- While spring travelers generally tend to bring pre-school aged children (in line with GSOBT marketing efforts), summer 2020 trips were more likely to include school-aged kids.



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

Travel Party Characteristics

- Summer 2020 visitors are younger and slightly more likely to be married than prior summer visitors. Household incomes overall are in line with prior visitors.

Year-over-Year Demographic Profile Summer visitors		2017	2018	2019	2020
Age	Average	42	45	46	42
Marital status	Married	67%	67%	67%	70%
	Divorced/ Separated	11%	10%	10%	11%
	Single/ Never married	19%	18%	20%	17%
	Widowed	3%	5%	3%	2%
HH income	Average	$106,086	$110,576	$116,268	$115,949

2017 n=859; 2018 n=426; 2019 n=507; 2020 n=401

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

- Condo stayers look similar year-to-year in terms of marital status, income, and education. However, they are younger this year, and more likely to be white. There are fewer retirees.
- Hotel stayers have lower incomes than in 2019 but higher than pre-2019 hotel stayers. There is also much less racial diversity among hotel stayers this year than last.

Summer demographic profile by lodging type		2017		2018		2019		2020	
		Vacation rental/condo	Hotel	Vacation rental/condo	Hotel	Vacation rental/condo	Hotel	Vacation rental/condo	Hotel
Age	Average	45	41	47	45	47	44	42	42
Marital status	Married	72%	65%	74%	63%	74%	63%	75%	69%
	Divorced/Separated	12%	10%	8%	11%	10%	12%	8%	11%
	Single/Never married	13%	22%	12%	21%	15%	22%	15%	16%
	Widowed	3%	3%	5%	5%	2%	3%	2%	4%
HH income	Average	$124,276	$99,267	$129,215	$100,198	$124,220	$111,074	$125,893	$105,762
Education	College grad+	64%	58%	70%	57%	73%	64%	71% [a]	58%
Occupation	Executive/upper management	14%	18%	10%	19%	16%	21%	13%	20%
	IT professional	5%	10%	2%	8%	7%	12%	6%	14% [b]
	Educator	14%	9%	13%	8%	12%	9%	15% [a]	5%
	Homemaker	12%	13%	12%	11%	16%	11%	11%	13%
	Student	2%	1%	1%	2%	0%	2%	0%	0%
	Small business owner	4%	8%	6%	6%	3%	5%	4%	4%
	Skilled trade/service	6%	9%	9%	9%	10%	8%	11%	13%
	Other	23%	17%	21%	17%	18%	14%	28%	18%
	Retired	17%	10%	21%	14%	16%	13%	5%	4%
	Not currently employed	2%	6%	4%	6%	2%	6%	8%	11%
Ethnicity	Caucasian/White	88%	75%	88%	78%	89%	79%	98% [a]	92%
	African-American/Black	6%	14%	5%	14%	5%	10%	1%	4% [b]
	Latino/Hispanic	2%	6%	2%	6%	2%	7%	1%	1%
	Asian	2%	6%	2%	2%	3%	5%	1%	2%
	American Indian	1%	1%	1%	2%	2%	1%	0%	1%
	Other	2%	1%	2%	2%	1%	0%	1%	1%

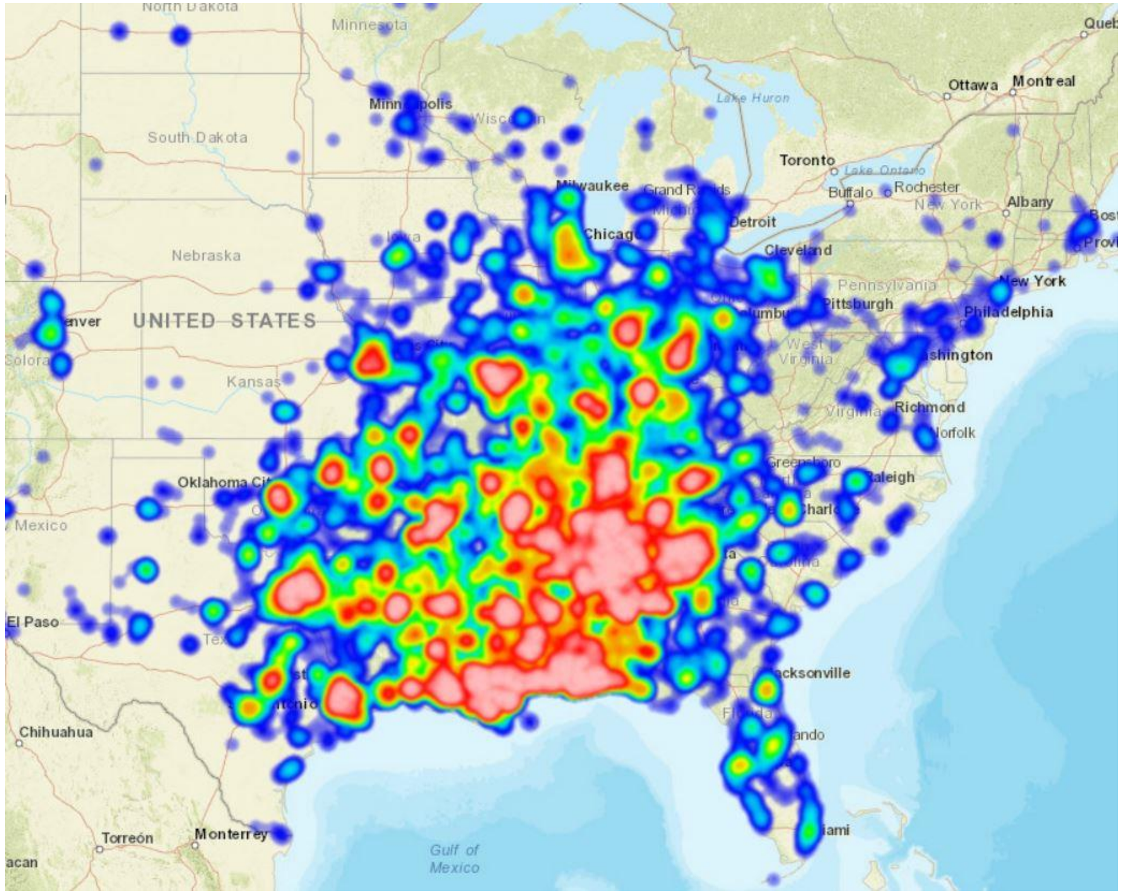
Travel Party Characteristics – New Visitors

- As a result of GSOBT marketing efforts, 2019 saw gains in higher income and more diverse visitors compared to prior years.
- Summer 2020 repeat visitors are more like pre-2019 visitors in that household incomes are lower. New visitors in 2020 actually have higher incomes than last year's new visitors, potentially as a result of other beaches being closed and continued impacts of the advertising campaign.
- There are considerably fewer retirees among 2020 visitors, likely due to health concerns amid the COVID-19 pandemic. More of this year's visitors are unemployed, which impacts visit spending.
- A higher share of visitors chose "other" occupations, which included health care workers and office workers (who are overwhelmingly working remotely during the pandemic).
- New visitors continue to be more diverse than repeat visitors, but this year there is much less diversity overall.

Summer demographic profile of new visitors, 2019 and 2020		Repeat visitors		New visitors	
		2019	2020	2019	2020
Age	Average	46	43	44	42
Marital status	Married	66%	71%	68%	65%
	Divorced/Separated	11%	12%	9%	8%
	Single/Never married	19%	16%	21%	23%
	Widowed	3%	1%	2%	4%
HH income	Average	$120,347	$114,393	$110,194	$113,124
Education	College grad+	69%	62%	65%	58%
Occupation	Executive/upper management	20%	13%	15%	16%
	IT professional	10%	9%	12%	8%
	Educator	9%	9%	12%	6%
	Homemaker	15%	13%	13%	8%
	Student	1%	0%	2%	0%
	Small business owner	4%	4%	5%	5%
	Skilled trade/service	8%	12%	11%	15%
	Other	16%	26%	13%	26%
	Retired	15%	5%	13%	5%
	Not currently employed	3%	10%	6%	9%
Ethnicity	Caucasian/White	88%	95%	75%	89%
	African-American/Black	6%	2%	12%	4%
	Latino/Hispanic	2%	1%	9%	5%
	Asian	4%	2%	5%	2%
	American Indian	2%	1%	1%	0%
	Other	0%	1%	0%	1%

Travel Party Characteristics

- Heat map showing source markets of summer visitors.



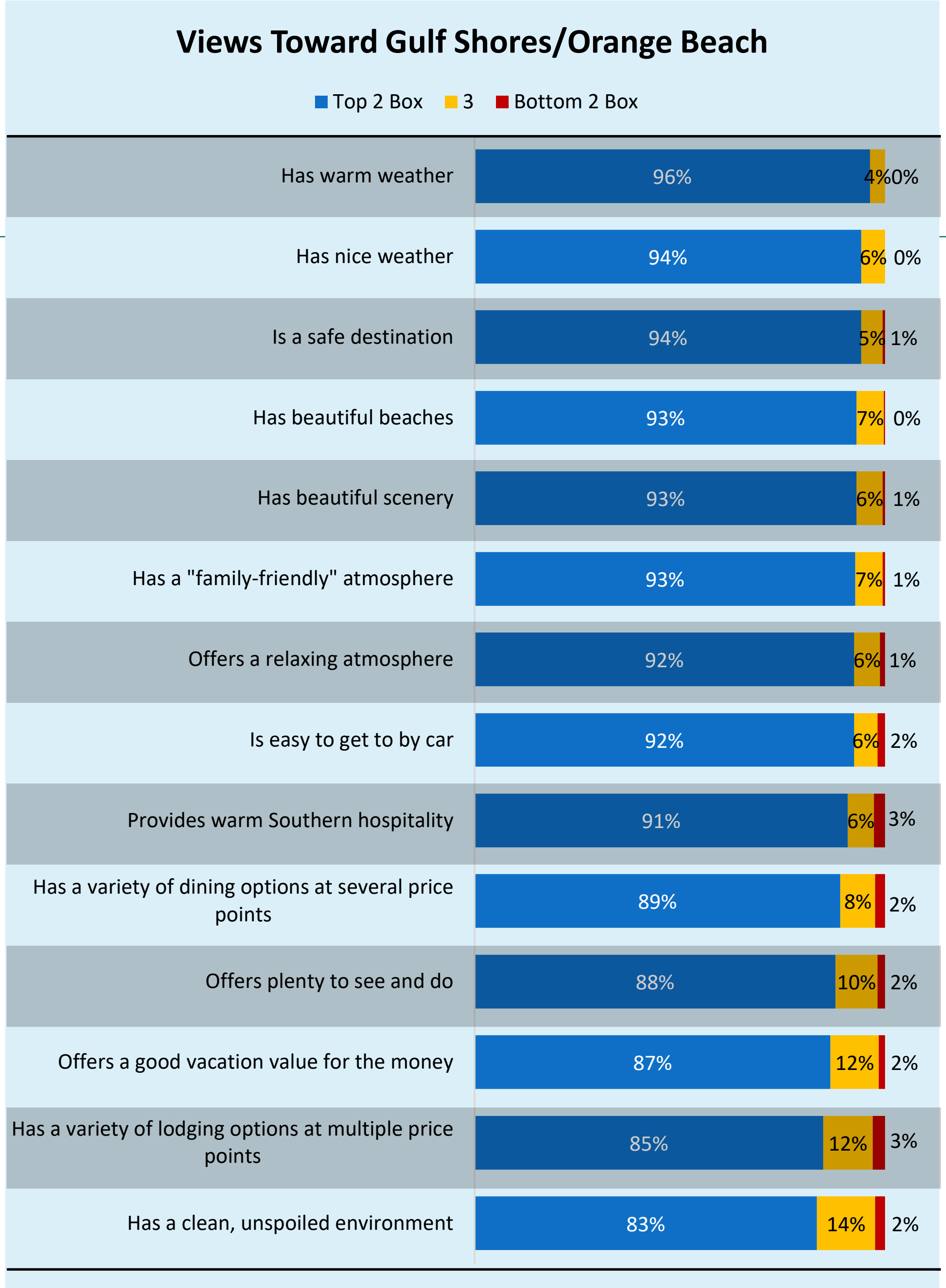
	2020
Alabama	31%
Louisiana	15%
Mississippi	11%
Texas	7%
Tennessee	7%
Georgia	5%
Florida	5%
Arkansas	4%
Missouri	3%
Kentucky	3%

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 summer visitors remain very positive, with weather continuing to be the most highly rated element of the summer experience.
- Top 2 box ratings are a little lower this summer than last, with some notable examples:
  - “Has a clean, unspoiled environment” dropped 6 points
  - The lodging options rating is 7 points lower
- In prior years, older visitors rated the area somewhat higher than younger visitors. Now, with fewer retirees visiting, younger visitors’ more moderate ratings are more evident.
- It is also possible that visitor behavior is impacting views of the destination.

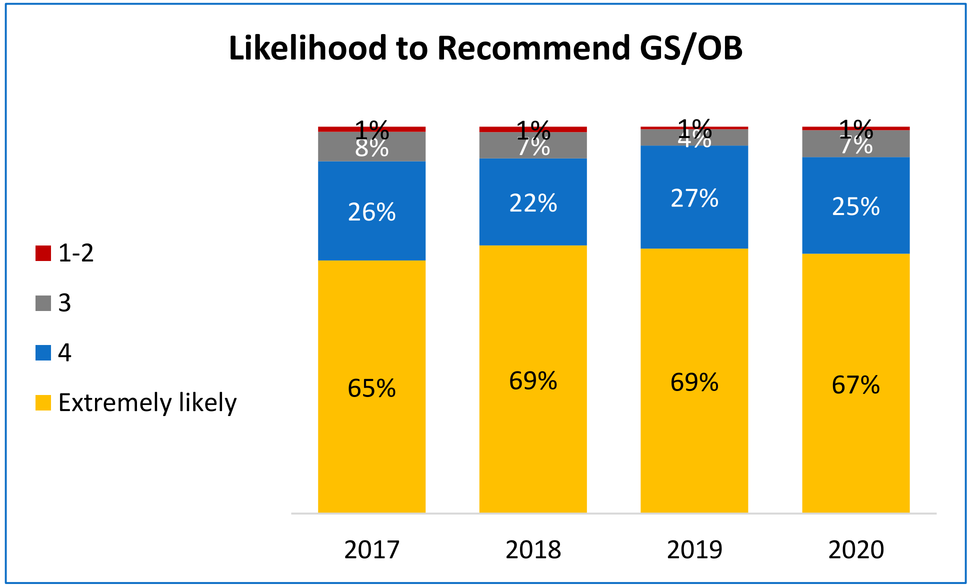
Question text: Thinking now about Gulf Shores/Orange Beach, how much do you agree that each of these statements describes the area? Response options: Does not describe at all – 1, 2, 3, 4, Describes extremely well – 5



	Summer 2019 top 2 box
Has warm weather	98%
Has nice weather	96%
Is a safe destination	95%
Has beautiful beaches	94%
Has beautiful scenery	95%
Has a "family-friendly" atmosphere	95%
Offers a relaxing atmosphere	95%
Is easy to get to by car	92%
Provides warm Southern hospitality	92%
Has a variety of dining options at several price points	92%
Offers plenty to see and do	90%
Offers a good vacation value for the money	88%
Has a variety of lodging options at multiple price points	92%
Has a clean, unspoiled environment	89%

Views Toward GS/OB & Trip Satisfaction

- With slight declines in image ratings, the slip in trip satisfaction makes sense. Demographic differences are also likely driving trip satisfaction, which has decreased among both lodging types.



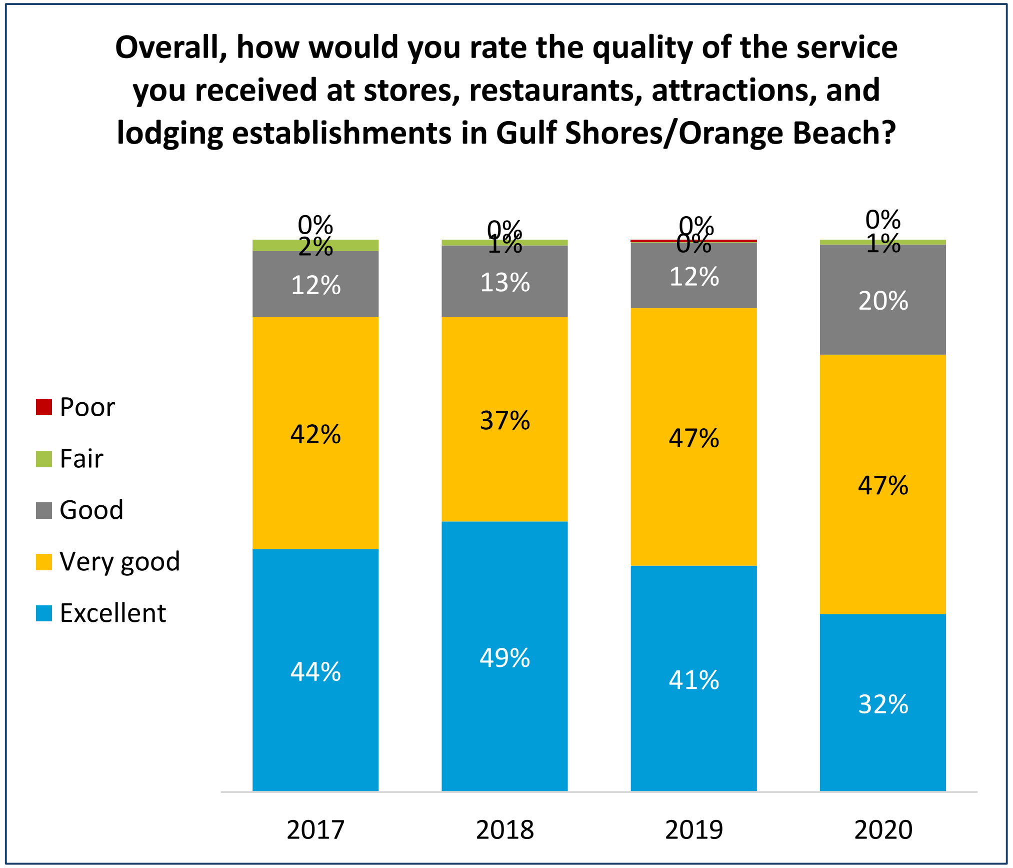
How likely are you to recommend Gulf Shores/Orange Beach to your friends or family as a destination to visit for a leisure trip? Summer visitors	**2017 Top 2 Box %**	**2018 Top 2 Box %**	**2019 Top 2 Box %**	**2020 Top 2 Box %**
Vacation rental/condo	90%	94%	95%	93%
Hotel	91%	90%	95%	91%

Condo/vacation rental 2017 n=721; 2018 n=369; 2019 n=200; 2020 n=188
Hotel/motel 2017 n=145; 2018 n=63; 2019 n=300; 2020 n=213
Due to the small sample size of 2018 hotel/motel stayers, these figures are presented as directional indicators.

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

Views Toward GS/OB & Trip Satisfaction

- GSOBT tracks service ratings to gauge whether seasonal staffing challenges are reflected in the satisfaction metric. In 2018, half of visitors rated their service as excellent; in 2020, just a third of visitors do so.
- There continues to be minimal negative feedback (poor or fair ratings), but we do see a shift from excellent to good.
- Several visitors cited COVID restrictions and having to adjust behavior and expectations, such as this visitor who gave service a very good rating, “We didn’t really go anywhere due to COVID. We ordered all our food to be delivered to our condo. We didn’t venture out any. So everything was very good.”
- Some comments embodied opposing views toward public health restrictions:
  - “There were more political restrictions impose under the cover of Wuhan virus considerations that kept the trip from being excellent.”
  - “Could have been better. There were too many people not practicing social distancing or wearing masks.”
- Others compared the destination to places they typically go but that were closed this summer: “It was nice but it wasn’t where I usually go.”

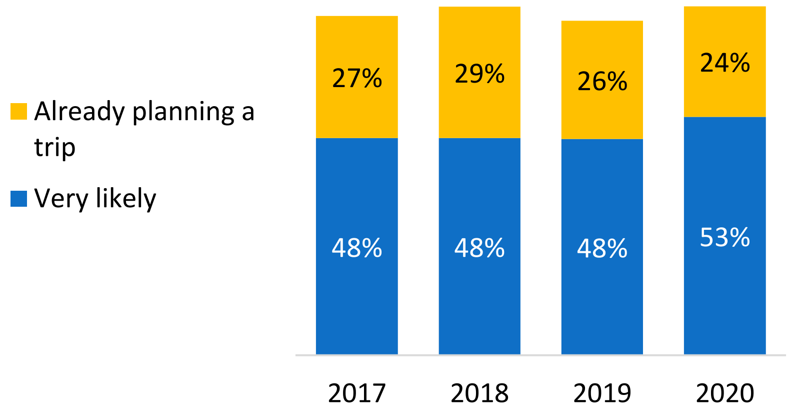


Question text: Overall, how would you rate the quality of the service you received at stores, restaurants, attractions, and lodging establishments in Gulf Shores/Orange Beach? Response options: Poor, Fair, Good, Very good, Excellent

Views Toward GS/OB & Trip Satisfaction

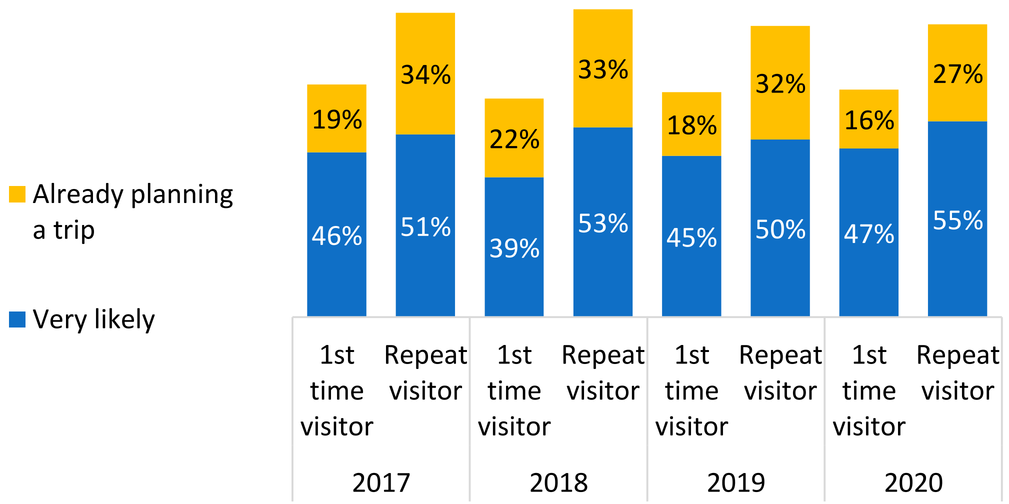
- Despite lower satisfaction and image ratings, likelihood to return remains high. Those who continued their annual GS/OB trip already plan to return. There is a small share – 2% – already planning to return who visited for the first time this year due to their usual destination being closed.
- Lower shares of “already planning a trip” and a shift toward “very likely” could be due to general concerns among consumers about planning anything definite in this strange pandemic era.

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	64%
I go there every year	49%
I have family and friends there	15%
I’ve always wanted to go there	11%
I usually visit a different beach destination, but it was closed this year due to COVID-19	2%

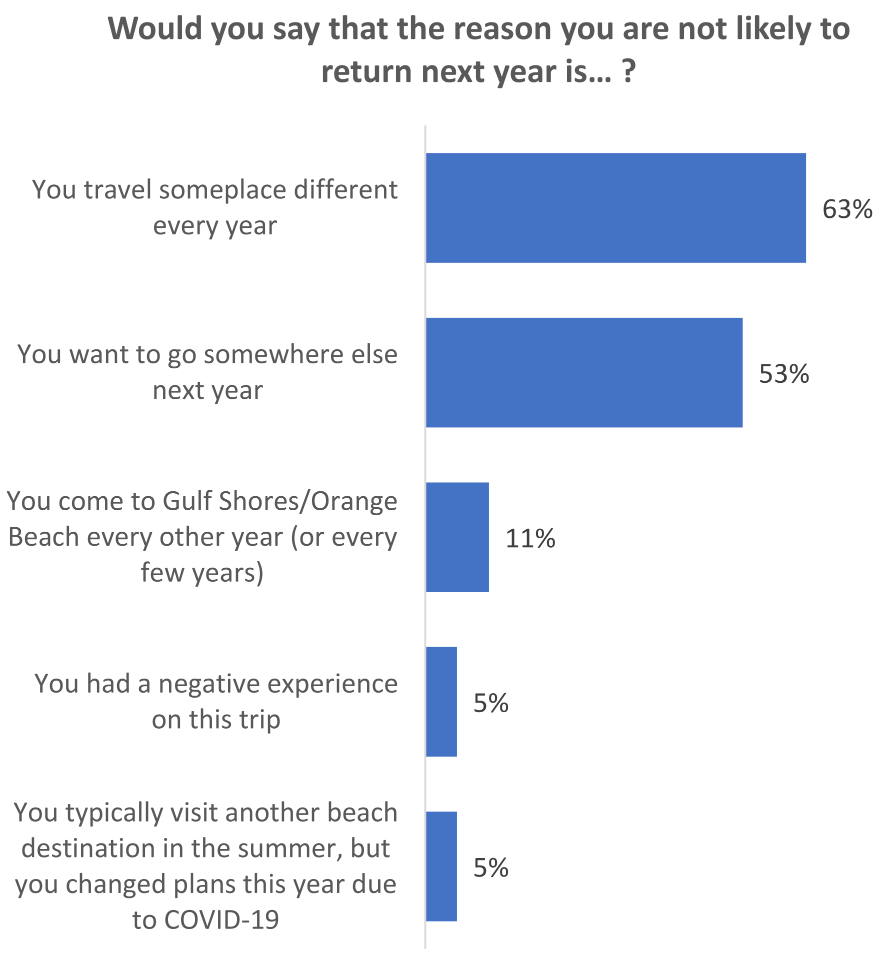
Likelihood to visit GS/OB in the next year



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

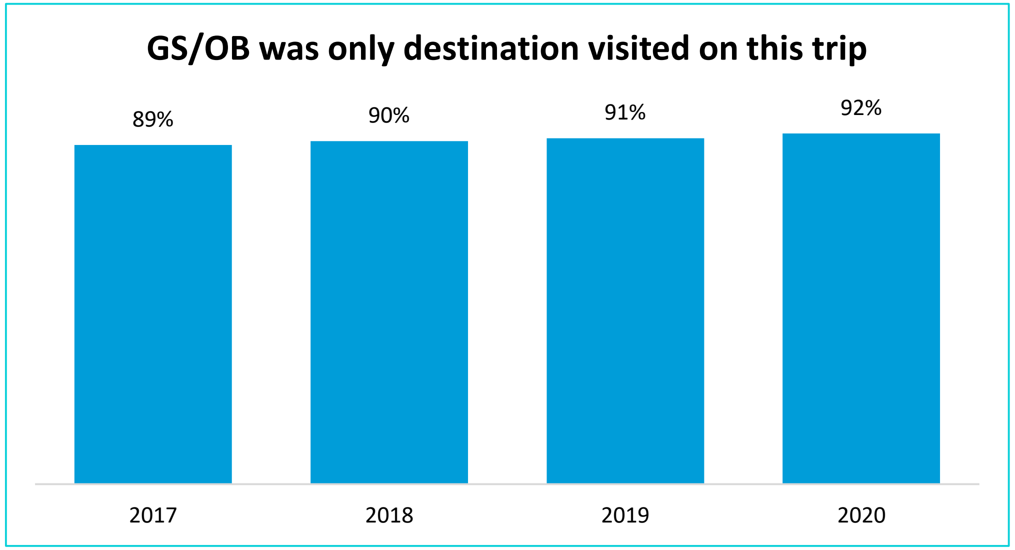
Views Toward GS/OB & Trip Satisfaction

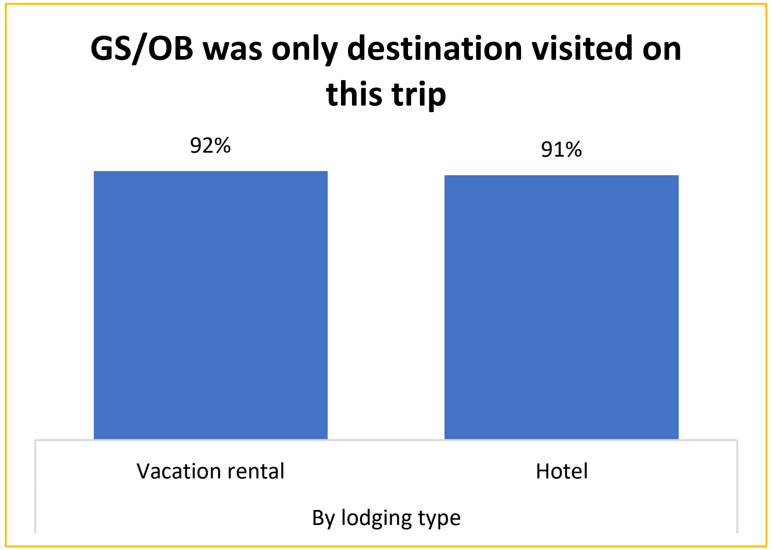
- While there was a shift toward “very likely” from “already planning a trip,” there are still very few visitors who have no likelihood to visit GS/OB again in the coming year (n=19, including day trippers).
- Those who said they were not at all or not very likely to visit again were asked why. Most of the responses are typical of what we see when we ask travelers this: consumers choose *for* a different destination rather than *against* GS/OB.
- The data do not point to a particular circumstance at the destination creating barriers to future visitation. Rather, shifts in image ratings and trip satisfaction are mainly driven by demographic changes and the pandemic itself.
- Myrtle Beach was the destination whose closure influenced a travel party to come to GS/OB this year.



Destinations Visited

- Most visitors do not include other destinations during their GS/OB trip. Nine in 10 summer travelers visit only GS/OB, and this is consistent with prior years.





Question text: Was Gulf Shores/Orange Beach the only destination you visited on this trip? Yes/No
Flyers are a small sample in summer 2020.

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

Welcome Center Supplemental Analysis

Visitor Profile Research – Summer 2020

Welcome Center Impact

- More than a third of hotel stayers and just 4% of condo stayers visited the Welcome Center this summer. New visitors were twice as likely to visit a Welcome Center than repeat visitors.
- Length of stay was not strongly impacted by visitation, which makes sense because visit length is typically determined before a trip begins.
- However, Welcome Center visitors participated in more activities. Promoting activities and attractions at the centers is an excellent way to introduce new visitors to the destination, and to influence repeat visitors to try things they may not have considered in prior trips.

Summer 2020 visits	No Welcome Center	Visited Welcome Center
Length of stay	4.0	4.1
# of activities on trip	5.4	6.6

Impact on Spending

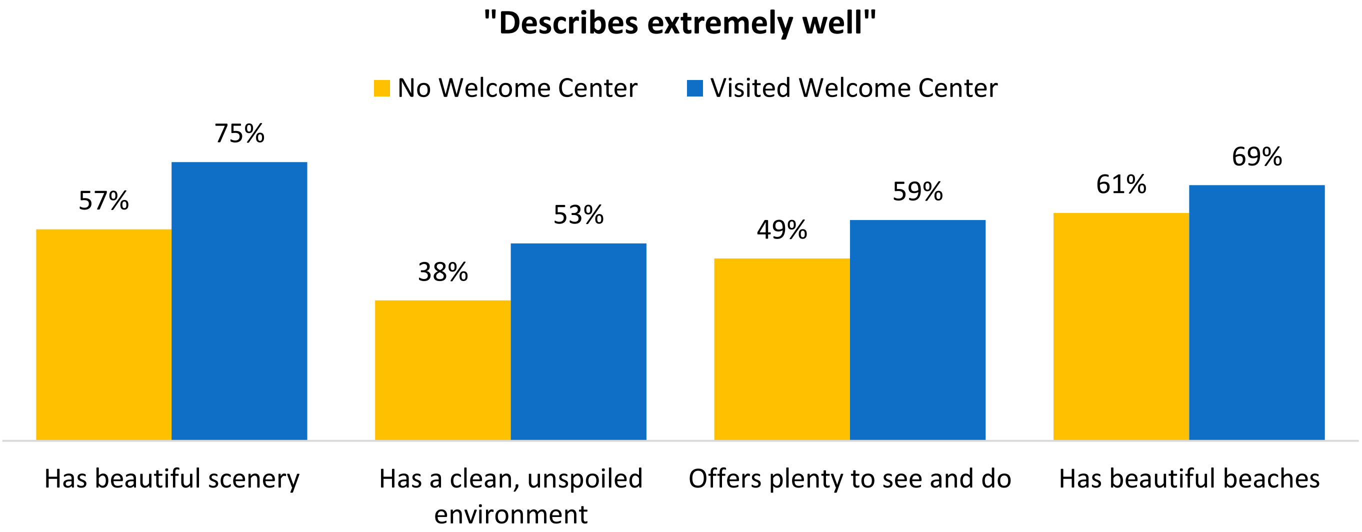
- Welcome Center visitors spent more money in the destination on shopping, recreation, transportation in the destination, and other expenditures.
- However, lodging and meal spending is lower among Welcome Center visitors, which reflects low Welcome Center usage among condo stayers, who stay longer.
- Again, this makes sense. While lodging decisions and length of stay are typically decided ahead of time, shopping and entertainment are often not pre-planned when visiting a place for leisure. So Welcome Centers have more opportunity to impact these metrics.
- Welcome Centers also have the opportunity to impact newer visitors to the destination, who tend to be hotel stayers.

Trip spending	No Welcome Center	Visited Welcome Center
Lodging	$1,286	$665
Meals/food/groceries	$347	$250
Shopping	$174	$203
Recreation or entertainment	$136	$210
Transportation within Gulf Shores	$32	$175
Other	$34	$112
Total	**$2,008**	**$1,614**

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.

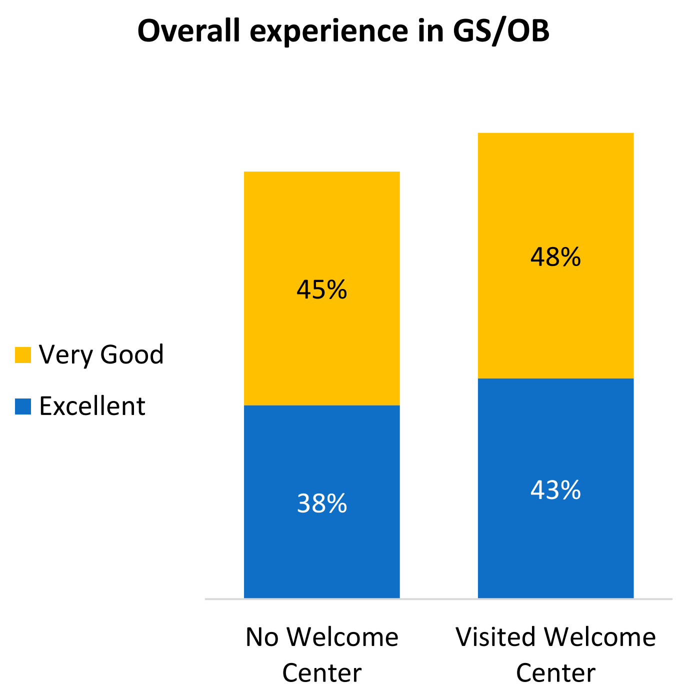
Impact on Image

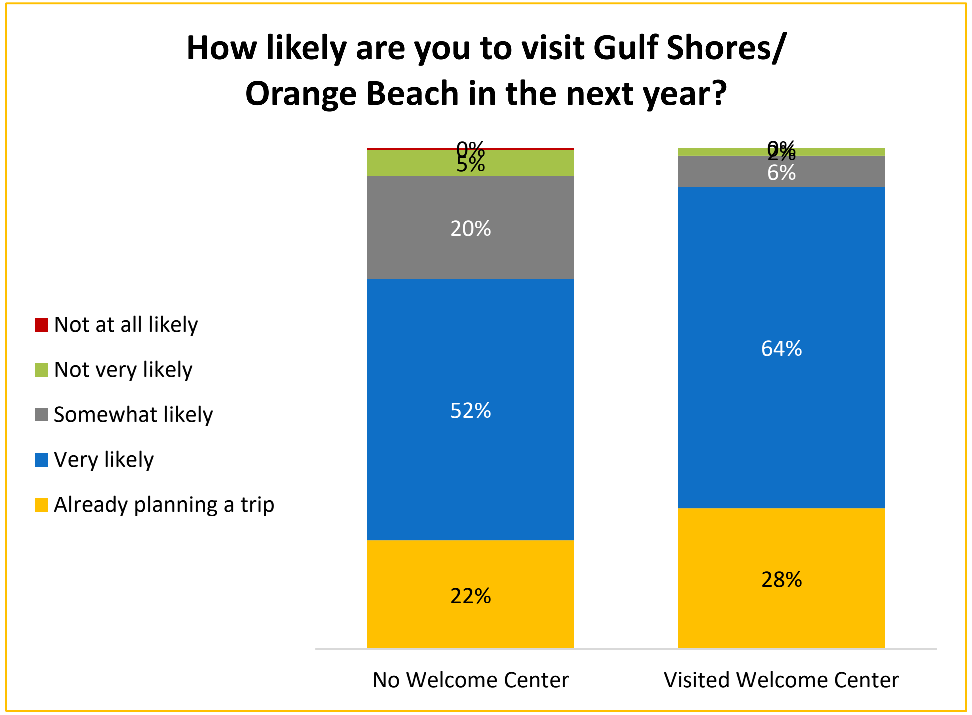
- Compared to those who did not use the Welcome Center, center visitors agree with image statements about the destination's natural assets and variety of experiences as shown below.
- Welcome Center visitors are also more familiar with GSOBT's *Share the Beach* turtle nesting program, *Leave Only Footprints* program, and the destination's practice of clearing the beach of all items before sunset. Boosting Welcome Center usage is likely to increase awareness of these important initiatives.



Impact on Experience and Intent to Return

- As in prior seasons, summer visitors who used a Welcome Center are more likely to report an excellent or very good overall experience in the destination. Welcome Center usage also is associated with a higher likelihood to return.





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

Appendix

Visitor Profile Research – Summer 2020

Comparing Target to Other Travelers

- This year's non-target visitors have visited twice in the past year. A quarter of them were first-time visitors this summer. These figures, which are lower than in recent years, reflect lower overall leisure travel during the COVID-19 pandemic.
- GSOBT focuses analysis of non-target trips on day visits to the destination. These non-target day trips exclude local residents. Visitors from Pensacola are included.
- We also employed screening questions to ensure that day visitors are coming to Gulf Shores/Orange Beach for leisure, rather than for work.

Non-target SUMMER Day trips	2017	2018	2019	2020
Average # visits/year	4.1	6.1	3.7	2.2
First time trips	34%	38%	36%	24%

2017 day trip n=252; 2018 day trip n=125; 2019 day trip = 125; 2020 day trip =100

Comparing Target to Other Travelers

Began planning summer trip	2017 Target travelers	2017 Non-target Day trip	2018 Target travelers	2018 Non-target Day trip	2019 Target travelers	2019 Non-target Day trip	2020 Target travelers (a)	2020 Non-target Day trip (b)
< 1 week before trip	4%	26%	4%	28%	3%	47%	5%	66% [b]
1-2 weeks	5%	14%	8%	18%	10%	26%	14% [a]	17%
3 weeks - 1 month	13%	17%	17%	22%	16%	18%	25% [a]	11%
2 - 3 months	34%	17%	27%	18%	33%	7%	36%	3%
4-6 months	25%	11%	24%	6%	22%	0%	14%	0%
6+ months	18%	15%	19%	9%	17%	2%	7%	3%

GS/OB is only destination visited on this trip	2017 Target travelers	2017 Non-target Day trip	2018 Target travelers	2018 Non-target Day trip	2019 Target travelers	2019 Non-target Day trip	2020 Target travelers (a)	2020 Non-target Day trip (b)
	89%	82%	91%	77%	91%	83%	92% [a]	85%

2017 target n=891, day trip n=242; 2018 target n=407, day trip n=114; 2019 target n=500, day trip n=125; 2020 target n=401, day trip n=100
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.
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		2020	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Family or friends	31%	34%	34%	22%	34%	40%	33% [a]	20%
Social media	13%	12%	8%	15%	19%	24%	18%	18%
Booking websites or apps	15%	15%	10%	12%	22%	8%	13%	8%
Hotel websites	19%	17%	12%	11%	20%	11%	14% [a]	4%
Gulf Shores & Orange Beach Tourism website	21%	11%	16%	10%	26%	6%	17%	12%
Local vacation rental company sites	18%	5%	17%	10%	20%	4%	11% [a]	2%
Travel advice websites or apps	10%	8%	9%	9%	15%	11%	13% [a]	4%
Vacation home rental booking sites/apps	37%	5%	40%	7%	41%	4%	46% [a]	4%
Travel/visitor guide	12%	10%	5%	7%	15%	4%	6%	8%
Traveler review sites or apps	18%	9%	9%	6%	26%	10%	16% [a]	6%
Travel blogs	5%	4%	4%	4%	8%	7%	2%	6% [b]
Alabama's official tourism website	6%	5%	5%	4%	9%	4%	5%	9%
Magazine and newspaper articles	2%	5%	1%	4%	4%	4%	2%	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 target n=891, day trip n=242;
2018 target n=407, day trip n=114;
2019 target n=500, day trip n=125;
2020 target n=401, day trip n=100
a / b indicate statistically significant differences at the 95% level.

Comparing Target to Other Travelers

Children on trip	2017		2018		2019		2020	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
% of trips with children	49%	28%	63%	33%	59%	45%	59%[a]	32%
Of trips with children: *2017 target n=54, day trip n=11; 2018 target n=61, day trip n=6; 2019 target n=295, day trip n=56; 2020 target n=204, day trip n=27*								
< 6 years old	34%	9%	50%	33%	43%	55%	44%	48%
6-11 years old	59%	45%	62%	50%	48%	52%	57%[a]	37%
12-17 years old	60%	55%	45%	17%	47%	38%	55%	78%[b]

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		2020	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Automobile	91%	78%	92%	85%	89%	76%	99%[a]	90%
Bus	2%	4%	2%	5%	1%	4%	0%	4%[b]
Airplane	7%	17%	6%	9%	10%	6%	1%	5%[b]
Other	0%	0%	0%	1%	1%	13%	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 target n=891, day trip n=242;
2018 target n=407, day trip n=114;
2019 target n=500, day trip n=125;
2020 target n=401, day trip n=100
a / b indicate statistically significant differences at the 95% level.

Comparing Target to Other Travelers

	2017		2018		2019		2020	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Travel party size	5.4	3.0	5.0	2.8	4.4	3.5	4.9 [a]	3.1

Trip spending	2017		2018		2019		2020	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Lodging	$1,606	$-	$1,408	$ -	$1,272	$ -	$1,234	$ -
Meals/food/groceries	$471	$194	$410	$206	$415	$98	$397 [a]	$103
Shopping	$294	$161	$266	$208	$275	$171	$207 [a]	$55
Recreation or entertainment	$242	$112	$173	$116	$203	$241	$167 [a]	$51
Transportation in Gulf Shores	$64	$78	$64	$79	$58	$76	$48	$32
Other	$65	$22	$54	$64	$58	$79	$44	$28
TOTAL	$2,741	$672	$2,375	$778	$2,280	$665	$2,097	$270
Per person spending	**$508**	**$189**	**$475**	**$240**	**$517**	**$190**	**$428**	**$87**

2017 target n=891, day trip n=242;
2018 target n=407, day trip n=114;
2019 target n=500, day trip n=125;
2020 target n=401, day trip n=100
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		2020	
		Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Gender	Male	24%	32%	29%	31%	29%	35%	21%	28%
	Female	76%	68%	71%	69%	71%	65%	73%	64%
Age	Average	44	46	47	47	45	48	42	44
Marital status	Married	71%	62%	73%	59%	68%	61%	70%	64%
	Divorced/Separated	12%	17%	8%	17%	11%	7%	11%	12%
	Widowed	3%	5%	6%	4%	2%	7%	2%	4%
	Single/Never married	14%	17%	14%	20%	19%	25%	17%	20%
HH income	Average	$120,083	$80,628	$124,837	$85,680	$116,268	$101,881	$115,949	$101,600

2017 target n=891, day trip n=242; 2018 target n=407, day trip n=114; 2019 target n=500, day trip n=125; 2020 target n=401, day trip n=100
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		2020	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Offers a relaxing atmosphere	94%	81%	93%	82%	95%	93%	92%	94%
Is easy to get to by car	90%	75%	93%	77%	92%	86%	92%	92%
Has beautiful beaches	90%	82%	93%	82%	94%	83%	93%	90%
Has a “family-friendly” atmosphere	93%	81%	95%	82%	95%	86%	93%	96%
Is a safe destination	93%	81%	95%	80%	95%	90%	94% [a]	86%
Has a clean, unspoiled environment	83%	70%	89%	75%	89%	86%	83% [a]	78%
Offers plenty to see and do	88%	75%	92%	82%	90%	81%	88%	88%
Has nice weather	93%	81%	93%	81%	96%	92%	94% [a]	80%
Provides warm Southern hospitality	92%	75%	91%	78%	92%	88%	91% [a]	86%
Has a variety of dining options at several price points	88%	74%	93%	78%	92%	81%	89%	86%
Has a variety of lodging options at multiple price points	87%	70%	90%	76%	92%	83%	85% [a]	80%
Has beautiful scenery	90%	80%	93%	79%	95%	85%	93%	96%
Has warm weather	96%	80%	97%	85%	99%	88%	96%	94%
Offers a good vacation value for the money	89%	69%	88%	69%	88%	83%	87% [a]	80%

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

2017 target n=891, day trip n=242; 2018 target n=407, day trip n=114; 2019 target n=500, day trip n=125; 2020 target n=401, day trip n=100
a / b indicate statistically significant differences at the 95% level.

Comparing Target to Other Travelers

Overall experience	2017		2018		2019		2020	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Top 2 Box Rating	**88%**	**68%**	**89%**	**70%**	**91%**	**85%**	**84%**	**83%**
5 (Excellent)	50%	35%	56%	40%	48%	46%	39%	34%
4 (Very good)	38%	33%	34%	30%	43%	39%	45%	48%
3 (Good)	10%	28%	10%	23%	7%	15%	14%	14%
2 (Fair)	1%	3%	0%	6%	1%	0%	2%	2%
1 (Poor)	1%	1%	0%	1%	0%	0%	0%	1%

Likelihood to recommend	2017		2018		2019		2020	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Top 2 Box Rating	**91%**	**79%**	**92%**	**82%**	**95%**	**85%**	**92%**	**88%**
5 (Extremely likely)	65%	50%	69%	61%	69%[b]	53%	67%	56%
4	26%	28%	22%	21%	26%	32%	25%	32%
3	8%	17%	7%	16%	4%	12%	7%	10%
2	1%	3%	1%	2%	0%	3%	1%	2%
1 (Not at all likely)	0%	2%	0%	1%	0%	0%	0%	0%

2017 target n=891, day trip n=242; 2018 target n=407, day trip n=114; 2019 target n=500, day trip n=125; 2020 target n=401, day trip n=100
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 Target travelers	2017 Non-target Day trip	2018 Target travelers	2018 Non-target Day trip	2019 Target travelers	2019 Non-target Day trip	2020 Target travelers (a)	2020 Non-target Day trip (b)
Likely to return (top 2 box)	**74%**	**66%**	**77%**	**67%**	**74%**	**69%**	**77%**	**76%**
5 (Already planning a trip)	27%	17%	29%	25%	26%	20%	24%	12%
4 (Very likely)	48%	49%	48%	42%	48%	48%	53%	64%
3 (Somewhat likely)	20%	25%	19%	27%	21%	24%	18%	18%
2 (Not very likely)	4%	5%	3%	4%	5%	7%	5%	4%
1 (Not at all likely)	1%	4%	2%	3%	0%	0%	0%	2%

During which season(s) would you be most likely to visit (of those likely to visit)	2017 Target travelers	2017 Non-target Day trip	2018 Target travelers	2018 Non-target Day trip	2019 Target travelers	2019 Non-target Day trip	2020 Target travelers (a)	2020 Non-target Day trip (b)
Spring	24%	26%	29%	36%	28%	44%	29%	40%
Summer	80%	72%	76%	66%	79%	69%	81%	77%
Fall	25%	26%	24%	28%	24%	36%	28%	57% b
Winter	6%	7%	7%	13%	6%	22%	5%	19% b

2017 target n=891, day trip n=242; 2018 target n=407, day trip n=114; 2019 target n=500, day trip n=125; 2020 target n=401, day trip n=100
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		2020	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Alabama	17%	17%	21%	21%	11%	12%	33%	51% [b]
Louisiana	17%	6%	20%	8%	14%	17%	21%	15%
Florida	7%	18%	7%	18%	12%	32%	3%	12% [b]
Texas	12%	16%	9%	10%	13%	10%	8%	10%
Mississippi	6%	8%	7%	6%	4%	10%	13% [a]	6%
Missouri	4%	1%	1%	3%	7%	2%	3%	2%
Arkansas	6%	1%	8%	2%	2%	0%	4%	2%
Tennessee	6%	5%	8%	6%	10%	3%	8% [a]	1%
Georgia	9%	7%	10%	12%	8%	8%	6% [a]	1%
Kentucky	2%	2%	2%	2%	2%	0%	2%	0%
Illinois	2%	3%	0%	2%	8%	5%	0%	0%
Indiana	4%	2%	4%	4%	4%	0%	0%	0%
Michigan	1%	2%	0%	0%	4%	0%	0%	0%
Wisconsin	1%	1%	1%	3%	1%	0%	0%	0%
Oklahoma	2%	3%	3%	3%	0%	0%	0%	0%
Ohio	3%	5%	0%	1%	0%	0%	0%	0%

2017 target n=891, day trip n=242; 2018 target n=407, day trip n=114; 2019 target n=500, day trip n=125; 2020 target n=401, day trip n=100
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		2020	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Beaches	82%	48%	80%	44%	81%	49%	80% [a]	52%
Dining out	64%	35%	62%	33%	67%	43%	66% [a]	30%
Swimming	64%	29%	59%	28%	58%	20%	64% [a]	31%
Relaxing	63%	40%	58%	39%	65%	25%	63% [a]	32%
Shopping	55%	36%	46%	25%	54%	18%	43% [a]	15%
Sightseeing	28%	34%	30%	26%	37%	18%	21%	17%
Shelling	17%	10%	19%	4%	19%	6%	15%	9%
Exercise/working out	14%	5%	15%	9%	15%	3%	16% [a]	4%
Fishing	13%	9%	14%	14%	14%	8%	14%	12%
Photography	12%	12%	13%	9%	12%	11%	7%	8%
Boating or sailing	11%	7%	12%	5%	11%	10%	11%	5%
Watching wildlife	8%	9%	11%	4%	16%	4%	10%	6%
Visiting friends/relatives who live in the area	7%	11%	11%	11%	12%	8%	8%	6%
Family/friends reunion	7%	11%	10%	11%	8%	4%	8%	3%
Dolphin tour	11%	7%	10%	4%	14%	9%	10%	6%
Bicycle riding	5%	3%	6%	4%	7%	3%	4%	8%
Parasailing/jet skiing	9%	3%	6%	3%	6%	1%	5%	2%
Historical sites	8%	12%	6%	11%	13%	6%	4%	9%
Visiting a spa	5%	5%	5%	4%	8%	4%	3%	3%
Scuba diving/snorkeling	5%	4%	5%	6%	5%	2%	4%	3%
Sporting events	4%	5%	5%	3%	3%	3%	3%	1%
Golfing	6%	5%	5%	4%	10%	2%	4%	2%
Kayaking/canoeing/paddle boarding	7%	4%	5%	3%	8%	2%	5%	6%
Tennis	3%	1%	3%	3%	6%	1%	2%	2%
Hiking on trails	6%	5%	3%	6%	12%	4%	7%	12%
Birdwatching	4%	4%	3%	4%	9%	1%	3%	4%
Concerts and nightlife	7%	2%	2%	1%	9%	7%	4%	1%
Festivals or special events (non-sports events)	4%	5%	1%	1%	7%	4%	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 table.

2017 target n=891, day trip n=242;
2018 target n=407, day trip n=114;
2019 target n=500, day trip n=125;
2020 target n=401, day trip n=100
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		2020	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Adventure Island	11%	5%	12%	1%	15%	3%	3%	2%
Alabama Gulf Coast Zoo	9%	4%	5%	2%	13%	8%	6%	4%
Alabama's Coastal Connection Scenic Byway	8%	3%	5%	2%	14%	4%	8%	5%
Battleship USS Alabama	10%	6%	5%	2%	12%	6%	6%	4%
Bellingrath Gardens	2%	2%	2%	2%	3%	4%	2%	1%
Bon Secour National Wildlife Refuge	3%	2%	1%	0%	5%	4%	3%	1%
Dauphin Island	10%	5%	6%	6%	13%	5%	8%	6%
Fort Morgan Historic Site	9%	2%	3%	2%	12%	4%	6%	6%
Gulf State Park	11%	10%	11%	6%	13%	4%	12%	10%
Hugh S. Branyon Backcountry Trail	2%	0%	0%	1%	3%	1%	1%	2%
National Naval Aviation Museum	6%	2%	1%	4%	8%	4%	2%	1%
OWA Park	1%	2%	2%	1%	4%	4%	4%	2%
Tanger Outlets	30%	12%	30%	9%	32%	16%	22%[a]	12%
The Track	10%	2%	9%	3%	12%	3%	8% [a]	2%
The Wharf	23%	5%	18%	6%	28%	9%	16%[a]	6%
Waterville	8%[b]	2%	7%	6%	7%	4%	3%	4%

2017 target n=891, day trip n=242; 2018 target n=407, day trip n=114; 2019 target n=500, day trip n=125; 2020 target n=401, day trip n=100
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.