GULF SHORES & ORANGE BEACH TOURISM

Alabama's White-Sand Beaches

Visitor Profile Research

Fall 2020

Strategic Marketing & Research Insights LLC

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Alabama's White-Sand Beaches

Introduction

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Background

- 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 and has remained open. Many other beach destinations closed as fall brought a resurgence of COVID-19 cases and restrictions. While occupancy is lower than in prior fall seasons, ADR is higher.
- This report is the third 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 pandemic travel restrictions, at those who came to the area because their usual beach destination was closed, and at how closures in GS/OB impacted visitor activity.

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 prior fall seasons

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 fall 2020 (September through November).
- Potential respondents were screened to ensure they were travelers to the Gulf Shores/Orange Beach area and were at least 25 years of age.
- Travelers were asked about multiple trips. The increase in day trip volume reflects changing consumer behavior during this stage of the pandemic.
- 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 Arrivalist's mobile data indicated were home markets for devices that spent time in the Gulf Shores/Orange Beach area during the fall months. Arrivalist is a mobile location data firm that provides GSOBT with a dashboard of data on traveler movement into and out of the destination.

Number of trips represented in the data	Fall 2020
Target trips (stayed 1-30 nights in paid accommodations)	336
Non-target trips (visited but did not stay overnight)	143

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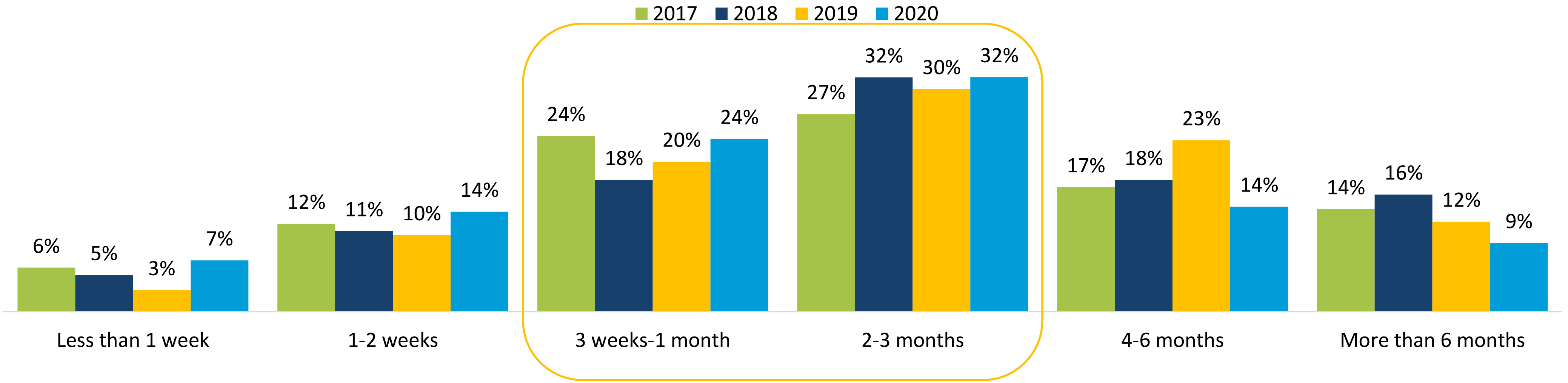
Detailed Findings

Visitor Profile Research – Fall 2020

Travel Planning

- The 2020 planning horizon is shorter than in 2019. The uncertainty caused by COVID-19 has made planning very far ahead of travel much more challenging than in years past.

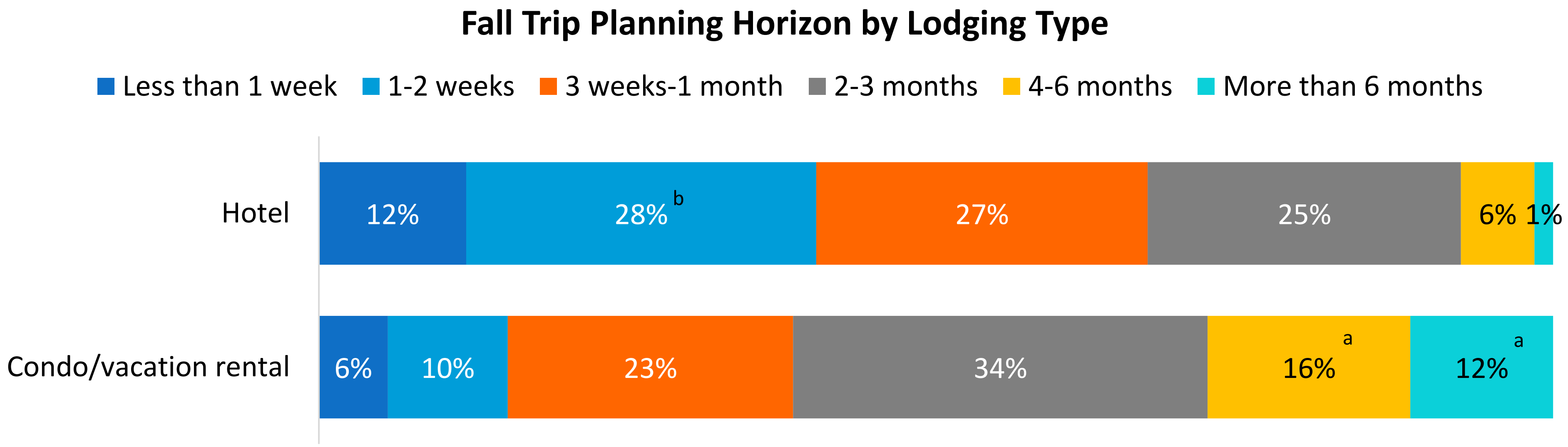
How far in advance did you begin planning your trip to Gulf Shores/Orange Beach?



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

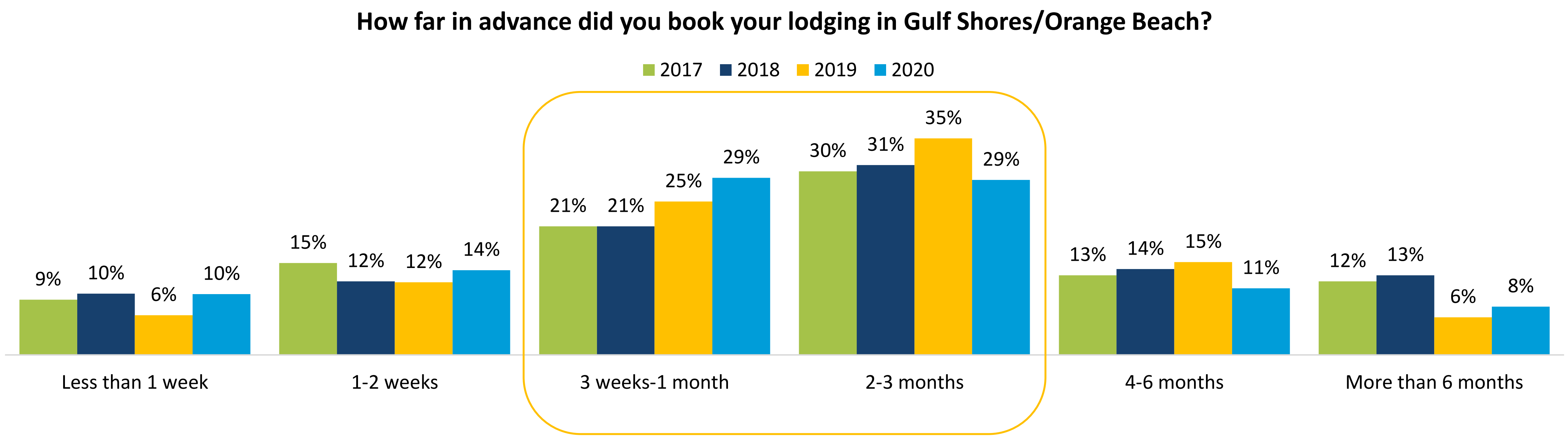
- Hotel stayers continue to take less time to plan their GS/OB stays than vacation renters.



Vacation rental/condo n=122 (a); Hotel/motel n=214 (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 in the past, fall trips are planned a little farther ahead of booking.

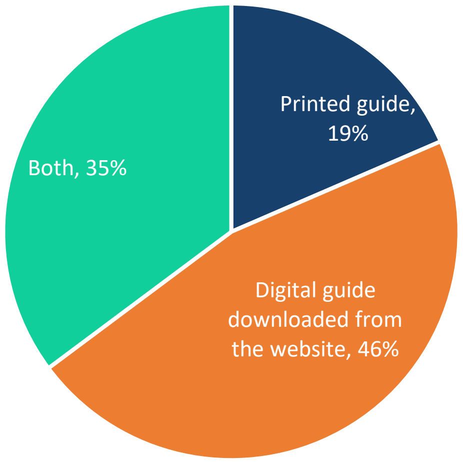


Question text: How far in advance did you book your lodging in Gulf Shores/Orange Beach? Response options as shown in graph above.

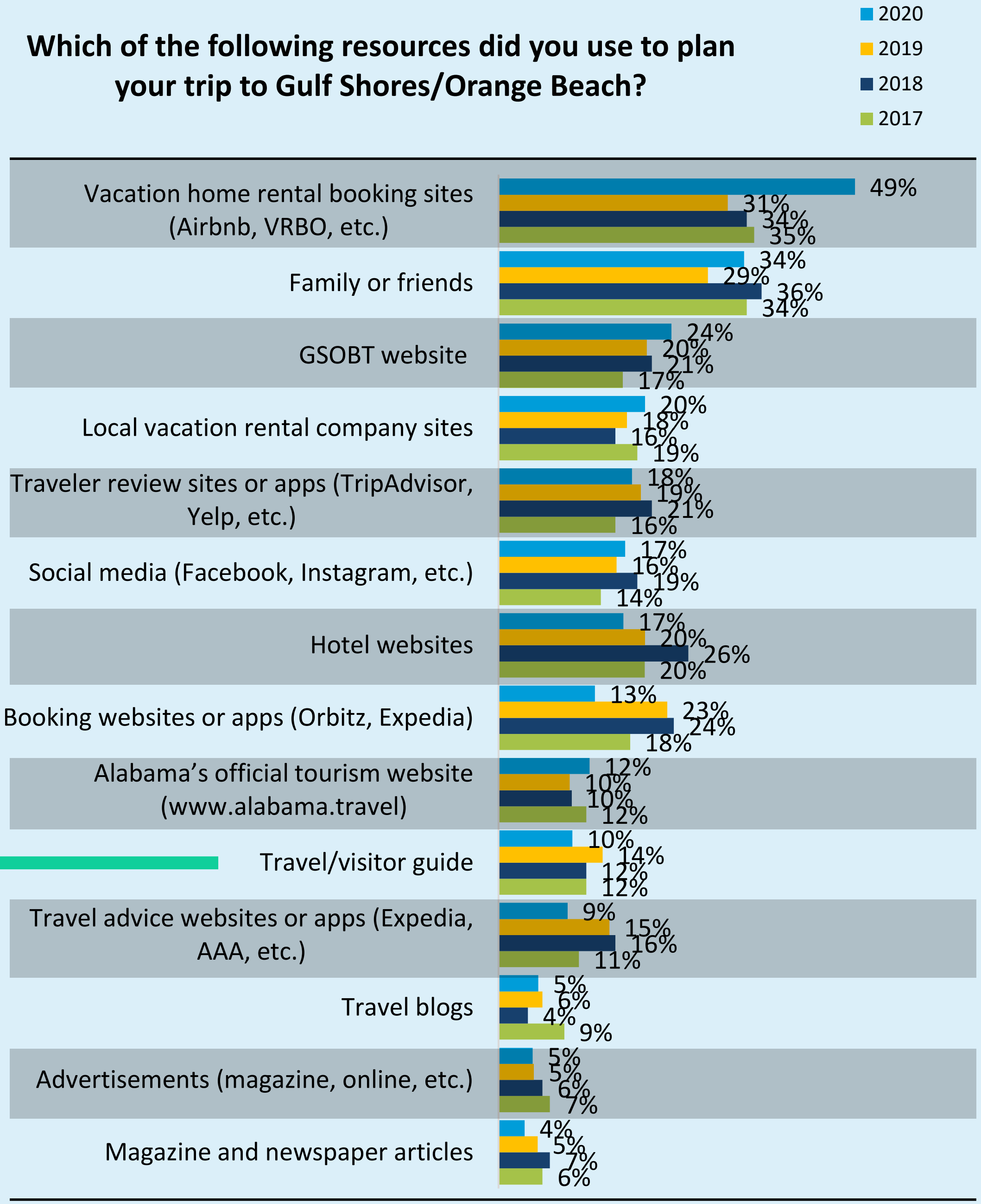
Travel Planning – Resources

- The top fall visit planning resources remain vacation home rental sites – which saw much higher usage this fall than in the past; nearly half of visitors used this resource.
- Almost a quarter of fall visitors used the GSOBT website to help plan their trip. This may be due to a different set of informational needs relative to the pandemic; travelers are looking to find out what is open and what is safe.
- Visitor Guide usage skewed toward the digital version, as in summer.

Visitor Guide format (2020)



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

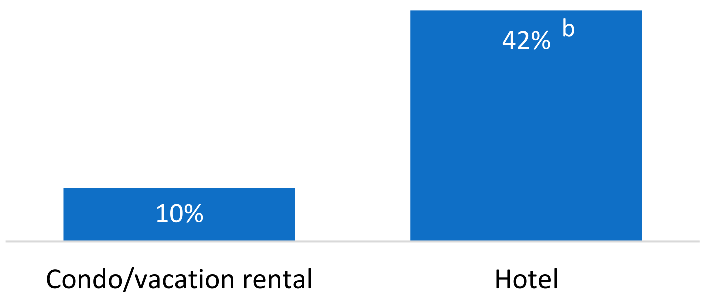


Question text: Which of the following resources did you use to plan your trip to Gulf Shores/Orange Beach? Response options as shown in table.

Travel Planning – Hotel vs. Condo Rental

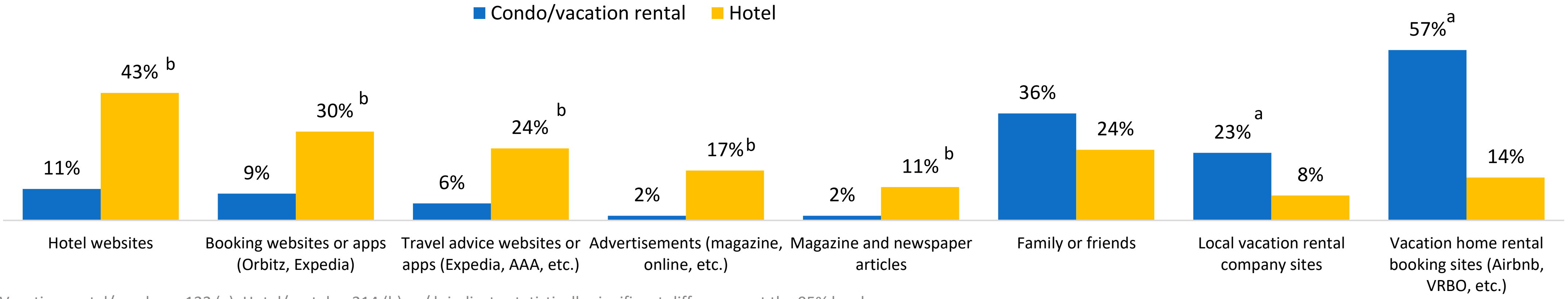
- Despite differences due to COVID-19, hotel stayers continue to use the welcome centers at a higher rate. Hotel stayers also use the hotel and booking sites, travel advice, ads, and print publications more than condo stayers. Fall hotel stayers also use the GSOBT website and social media at a higher rate, as we've seen in prior seasons.
- Again, this information-gathering appears to be driven by visitors looking for information about what is open, requirements, etc. due to COVID-19.

Visited the Gulf Shores/Orange Beach Welcome Center (2020)



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

Trip planning resources with biggest difference by lodging type

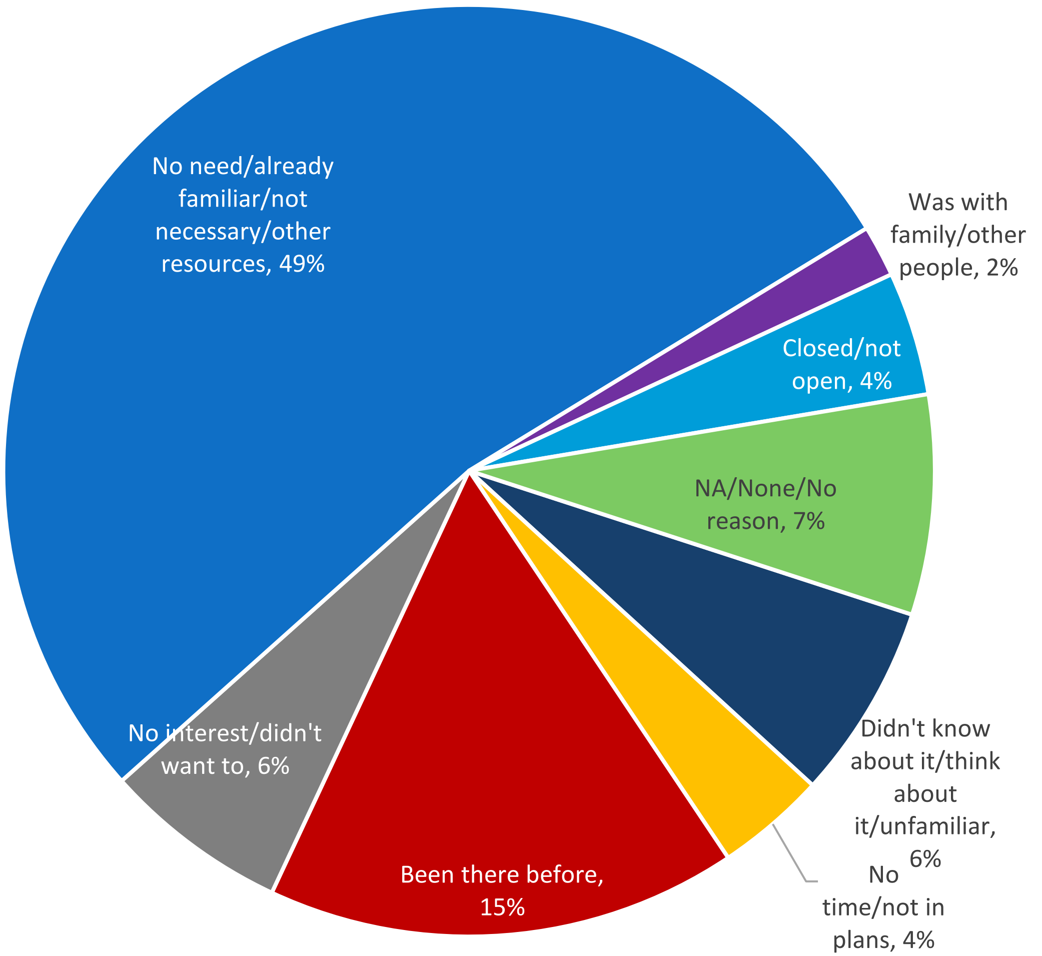


Vacation rental/condo n= 122 (a); Hotel/motel n=214 (b); a / b indicate statistically significant differences at the 95% level.
Question text: Which of the following resources did you use to plan your trip to Gulf Shores/Orange Beach? Response options as shown in graph above.

Travel Planning

- Of those who did not visit a welcome center, nearly half say it is because they didn't need to, they are already familiar with the destination, which is consistent with last fall.
- Compared to fall 2019, fewer welcome-center-non-visitors said they didn't know about the centers (6% down from 13% last year).
- Continuing to promote the Welcome Centers, especially among new visitors, is an effective way to deepen engagement with the destination.

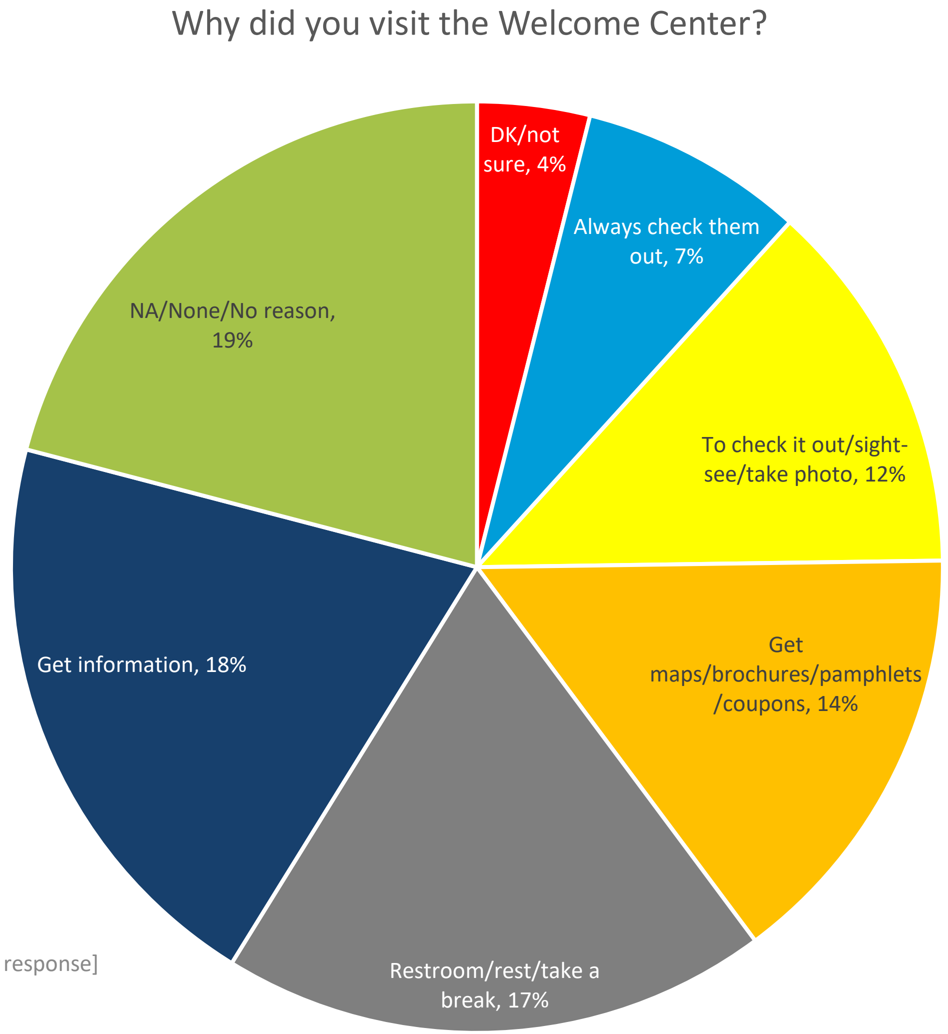
Why didn't you visit the welcome center?



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

Travel Planning – Welcome Center Visitors

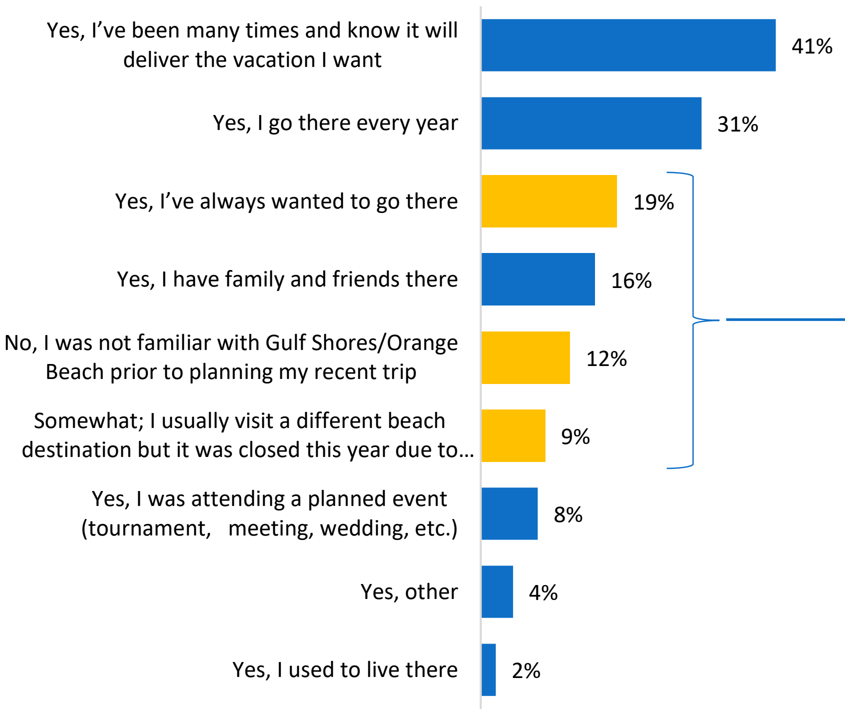
- Last fall, 64% of visitors went there to get information generally or for printed materials specifically. This fall, half as many went to the center for that reason.
- Fall 2020 saw a wider array of reasons to visit the centers, with a fairly even share giving informational or behavioral reasons. Those who stopped in for a break or to use the restroom jumped from 4% to 17%, year to year.



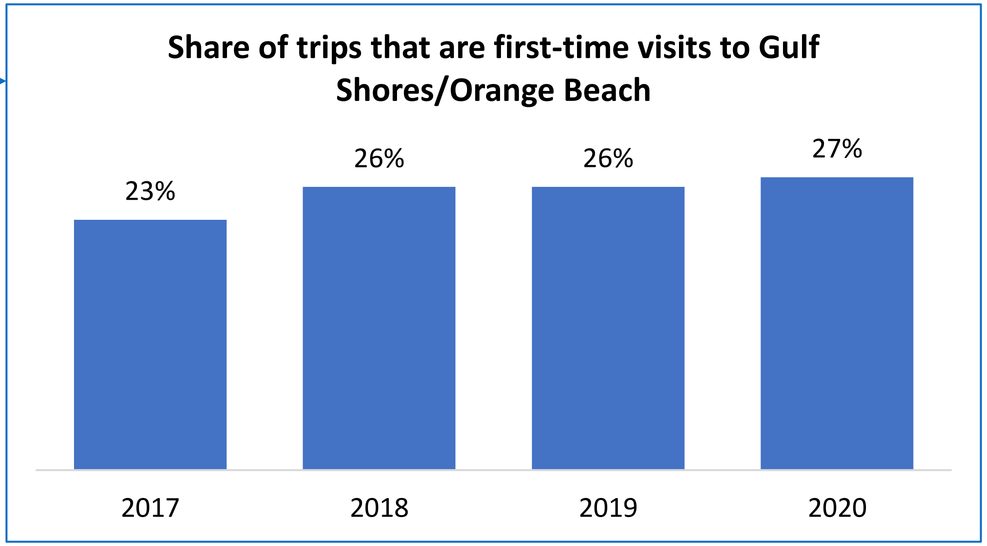
Question text: Why did you visit the welcome center? [open ended response]

Trip Characteristics

Prior to this visit, was Gulf Shores/Orange Beach familiar to you? (2020)



- First-time visitation in fall remains at about a quarter of visitors, although that has grown over the past four years.
- Almost 1 in 10 fall visitors said they visited GS/OB because their typical beach spot was closed due to COVID-19. This is on par with the summer result.

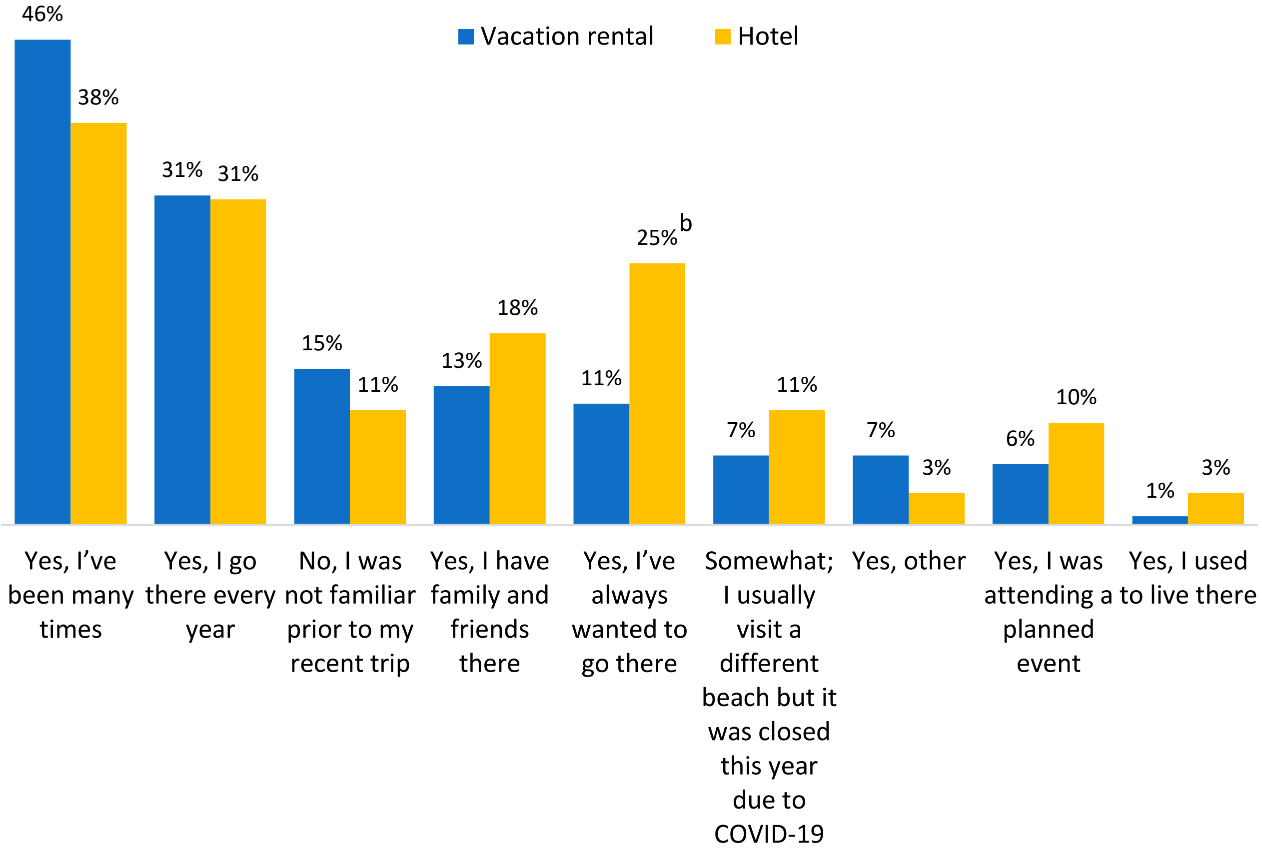


Question text: Prior to your visit, was Gulf Shores/Orange Beach familiar to you? Response options as shown in graph above.

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

Hotels would be a good location to promote the welcome centers.

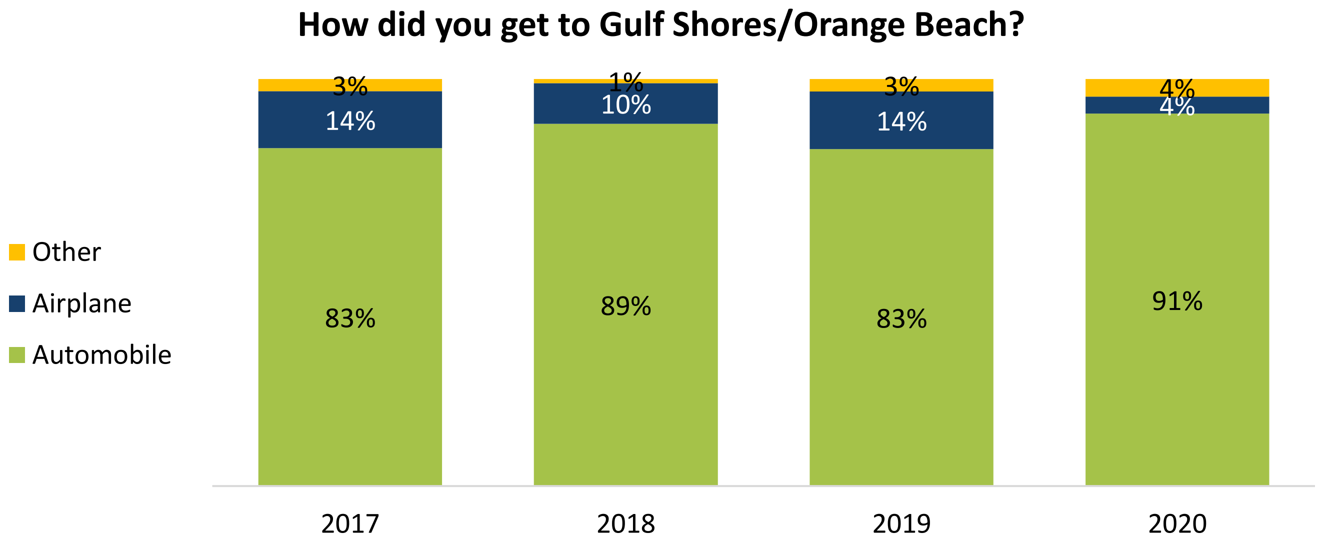
Differences in Reasons for Familiarity



Vacation rental/condo n= 122 (a); Hotel/motel n=214 (b); a / b indicate statistically significant differences at the 95% level.
Question text: Prior to your visit, was Gulf Shores/Orange Beach familiar to you? Response options as shown in graph above.

Trip Characteristics

- Most fall visitors drive to GS/OB, and more so this year. Two-thirds of the very few fly visitors (n=14) came from West Palm Beach, Dallas, and Orlando.
- From a very small sample of fly visitors, most flew into Pensacola as we have seen in prior seasons.



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.

Trip Characteristics

- Most fall visits continue to include the beach, as do all seasons. This year there has been a decline in shopping as a general activity, likely due to COVID-19 and associated restrictions.
- While summer trips have higher shares of dining out, relaxing, and swimming, fall 2020 visits were more likely to include shelling, exercise/working out, hiking on trails, and bicycle riding.

Fall trip participation	2017	2018	2019	2020
Beaches	63%	74%	69%	73%
Relaxing	56%	63%	66%	62%
Dining out	59%	66%	67%	60%
Swimming	48%	45%	37%	43%
Shopping	49%	57%	47%	42%
Sightseeing	29%	34%	29%	28%
Tanger Outlets	26%	30%	29%	26%
Shelling	16%	15%	16%	24%
Watching wildlife	14%	16%	15%	19%
Exercise/Working out	14%	10%	11%	18%
Fishing	19%	15%	8%	17%
Dauphin Island	13%	11%	11%	15%
The Wharf	14%	17%	18%	15%
Photography	11%	15%	11%	15%
Hiking on trails	9%	9%	8%	14%
Gulf State Park	16%	17%	20%	12%
Visiting friends/relatives in the area	8%	10%	13%	10%
Historical sites	12%	12%	13%	10%
Fort Morgan Historic Site	9%	7%	13%	10%
Birdwatching	6%	8%	5%	9%
Bicycle riding	5%	7%	5%	9%
Boating or sailing	8%	9%	6%	8%
Alabama's Coastal Connection Scenic Byway	9%	10%	8%	7%
Golfing	8%	6%	9%	7%
The Track	10%	8%	5%	7%
Scuba diving/Snorkeling	3%	6%	4%	6%

Cont'd.	2017	2018	2019	2020
Alabama Gulf Coast Zoo	10%	9%	8%	6%
Dolphin tour	10%	10%	11%	6%
Family/friends reunion	13%	11%	7%	5%
Concerts and nightlife	13%	10%	11%	5%
Adventure Island	8%	9%	9%	4%
Kayaking/Canoeing/Paddle boarding	10%	6%	7%	4%
Tennis	5%	2%	2%	4%
Parasailing/Jet skiing	6%	5%	4%	4%
Visiting a spa	9%	6%	6%	4%
OWA Park	2%	4%	3%	4%
Battleship USS Alabama	7%	8%	10%	3%
Bellingrath Gardens	5%	3%	4%	3%
Hugh S. Branyon Backcountry Trail	6%	3%	2%	3%
Bon Secour National Wildlife Refuge	5%	5%	6%	3%
National Naval Aviation Museum	4%	6%	8%	3%
Sporting events	4%	6%	6%	2%
Waterville	3%	3%	5%	2%
Festivals or special events	7%	9%	10%	2%

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

Trip Characteristics

- Due to widespread closures of a number of attractions and activities across destinations in 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 to due to it being closed.
- As in summer, more than half of fall visitors experienced no such issues. Of those who did, the most frequent were the Battleship USS Alabama, concerts and nightlife, and the zoo. These are similar to the list we saw for summer 2020.

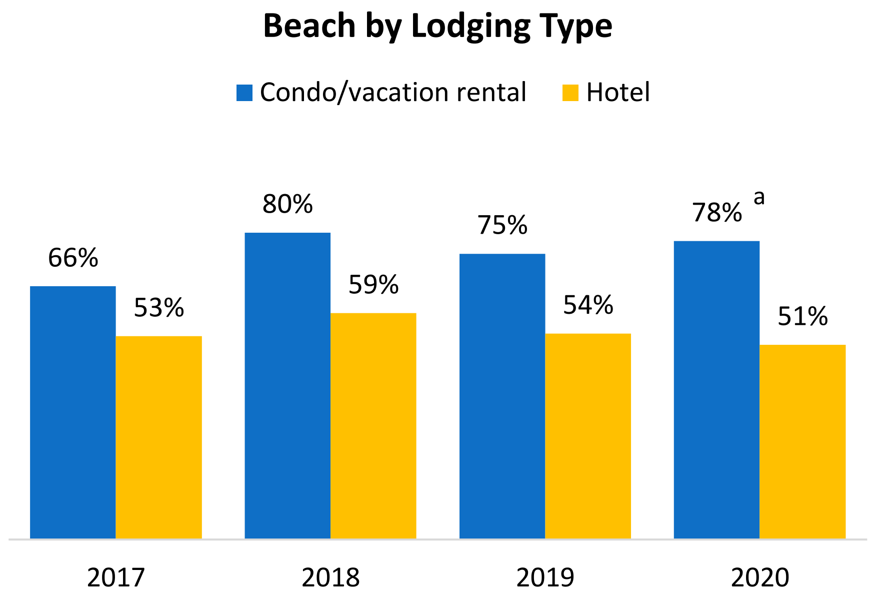
	Went to	Wanted to but was closed
None of these	3%	52%
Battleship USS Alabama	3%	12%
Concerts and nightlife	5%	12%
Alabama Gulf Coast Zoo	6%	10%
Historical sites	10%	9%
Festivals or special events	2%	9%
Dining out	60%	9%
National Naval Aviation Museum	3%	9%
Scuba diving/Snorkeling	6%	8%
Sporting events	2%	8%
Dolphin tour	6%	8%
Swimming	43%	7%
Golfing	7%	7%
Parasailing/Jet skiing	4%	7%
The Wharf	15%	7%
The Track	7%	7%
Gulf State Park	12%	7%
Shopping	42%	7%
Visiting a spa	4%	7%
Bon Secour National Wildlife Refuge	3%	7%
Bellingrath Gardens	3%	7%
OWA Park	4%	7%
Kayaking/Canoeing/Paddle boarding	4%	7%
Fort Morgan Historic Site	10%	6%
Tennis	4%	6%
Shelling	24%	6%
Fishing	17%	6%
Waterville	2%	6%

	Went to	Wanted to but was closed
Hugh S. Branyon Backcountry Trail	3%	5%
Alabama's Coastal Connection Scenic Byway	7%	5%
Boating or sailing	8%	5%
Birdwatching	9%	5%
Dauphin Island	15%	5%
Sightseeing	28%	4%
Adventure Island	4%	4%
Bicycle riding	9%	4%
Visiting friends/relatives who live in the area	10%	4%
Exercise/Working out	18%	4%
Family/friends reunion	5%	4%
Relaxing	62%	4%
Photography	15%	4%
Beaches	73%	4%
Hiking on trails	14%	4%
Tanger Outlets	26%	3%
Watching wildlife	19%	2%

Question text: What attractions and activities did you visit or participate in while in Gulf Shore

Trip Characteristics

- Vacation renters continue to visit GS/OB beaches at a higher rate than hotel visits. These are longer trips with more time for beach activities.

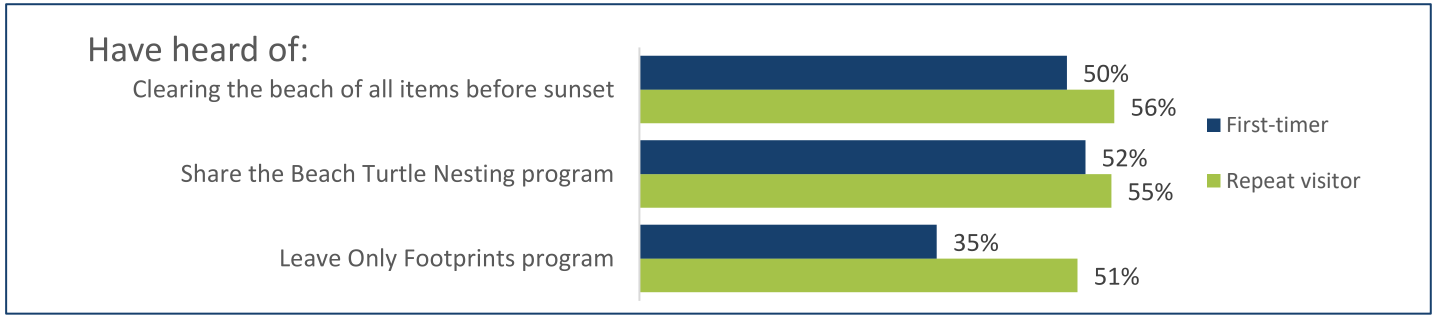


Question text: What attractions and activities did you visit or participate in while in Gulf Shores/Orange Beach on your trip? Response chosen: beach
Condo/vacation rental 2019 n=206, 2020 n= 122 (a); Hotel/motel 2019 n=231, 2020 n= 214 (b)
a / b indicate statistically significant differences at the 95% level.

Trip Characteristics

- The beach as a fall trip motivator is growing year to year.
- Other top motivators of fall visits are relaxation and dining out.
- Half of all visitors – repeat and new – have heard of the destination's policy of clearing the beach of all items before sunset. This is a sizable jump since summer, when only a third of first-time visitors had heard of it.
- There was also an increase in familiarity with the turtle nesting program among first-time visitors.
- However, only about a third of new visitors had heard of Leave Only Footprints, which is the same level as in summer.

Fall trip motivators	2017	2018	2019	2020
Beaches	53%	58%	61%	64%
Relaxing	38%	43%	42%	38%
Dining out	20%	23%	31%	26%
Swimming	18%	15%	13%	16%
Shopping	13%	13%	16%	14%
Tanger Outlets	9%	12%	10%	9%
Sightseeing	9%	10%	8%	8%
Shelling	5%	6%	3%	8%
Fishing	5%	5%	4%	7%
Visiting friends/relatives in the area	6%	7%	8%	6%



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

Trip Characteristics

- Fall spending is up overall, with more spent on lodging than ever before. This is driven by higher spending on condo stays; hotel lodging spending actually declined. ADR for both is up this fall over prior years.

Average Travel Party Expenditures per Trip – FALL	2017		2018		2019		2020	
	Spending	% of total	Spending	% of total	Spending	% of total	Spending	% of total
Lodging	$802	46%	$892	46%	$812	50%	$928	53%
Meals/food/ groceries	$381	22%	$397	21%	$333	20%	$347	20%
Shopping	$259	15%	$347	18%	$260	16%	$242	14%
Recreation or entertainment	$175	10%	$184	10%	$143	9%	$101	6%
Transportation within Gulf Shores	$70	4%	$74	4%	$53	3%	$75	4%
Other	$43	2%	$36	2%	$37	2%	$42	2%
TOTAL	**$1,729**		**$1,930**		**$1,638**		**$1,734**	

2017 n=383; 2018 n=397; 2019 n=437; 2020 n=336

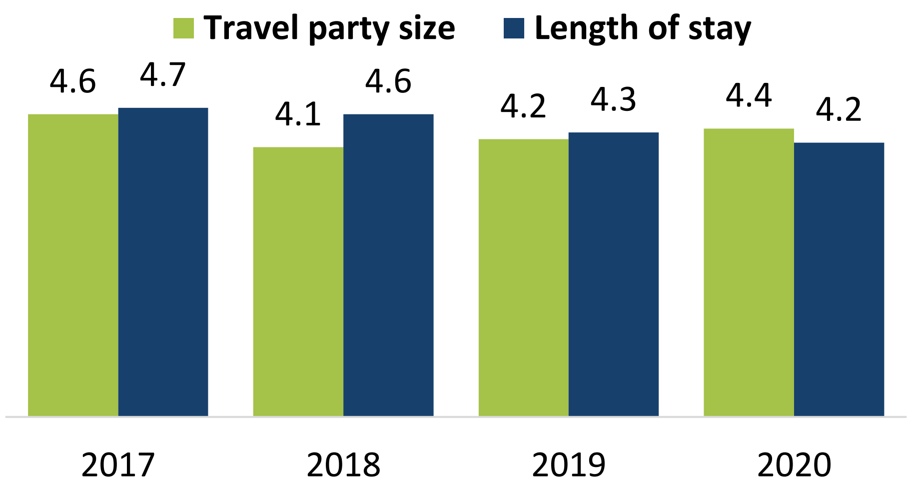
Average Travel Party Expenditures per Trip – FALL	2017		2018		2019		2020	
	Vacation rental	Hotel	Vacation rental	Hotel	Vacation rental	Hotel	Vacation rental (a)	Hotel (b)
Lodging	$886	$475	$1,023	$558	$924	$493	$1,058 [a]	$374
Meals/food/ groceries	$405	$288	$426	$322	$350	$282	$364	$274
Shopping	$261	$251	$305	$455	$262	$252	$240	$252
Recreation or entertainment	$174	$179	$181	$193	$131	$177	$86	$164 [b]
Transportation within Gulf Shores	$63	$96	$71	$82	$40	$91	$66	$110
Other	$38	$64	$36	$37	$33	$51	$32	$81 [b]
TOTAL	**$1,826**	**$1,354**	**$2,041**	**$1,647**	**$1,740**	**$1,345**	**$1,847**	**$1,256**

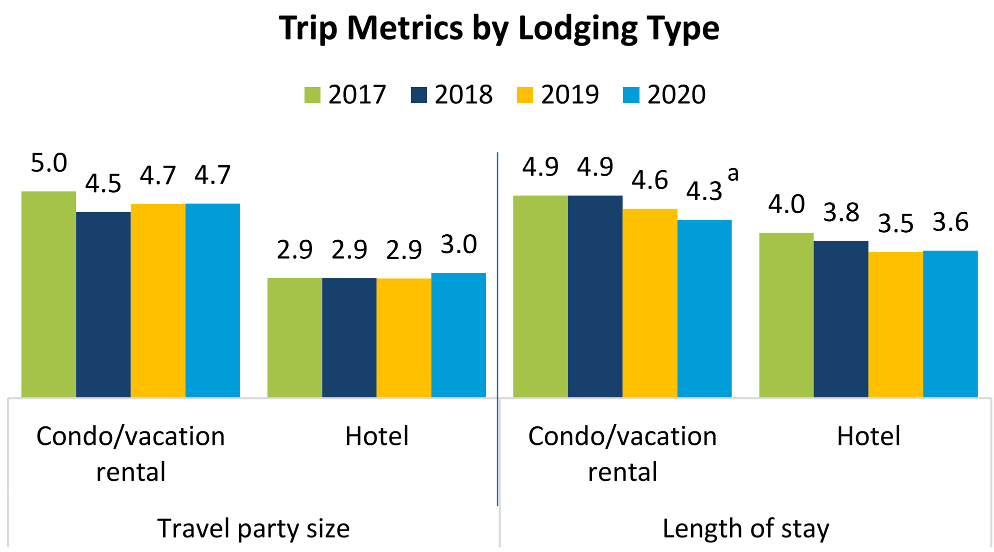
Condo/vacation rental 2017 n=118; 2018 n=162; 2019 n=206; 2020 n=122
Hotel/motel 2017 n=265; 2018 n=235; 2019 n=231; 2020 n=214

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

- Fall travel party size remains at just over 4. Hotel stayers visit with fewer people than condo stayers.
- Length of stay continues its decline, driven by shorter condo stay. Higher rates may be shortening stays for some visitors, as others may be upgrading accommodations to offset the activities they can't spend on due to things being closed.



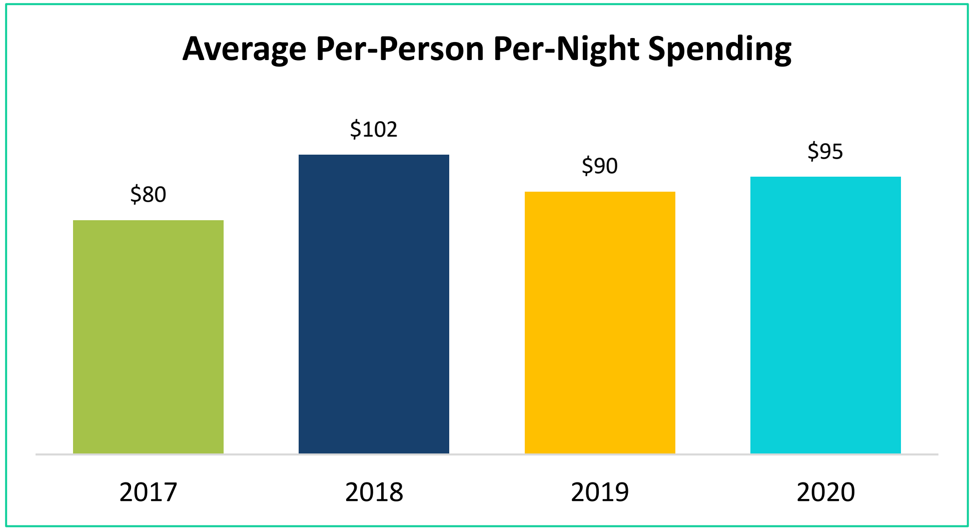


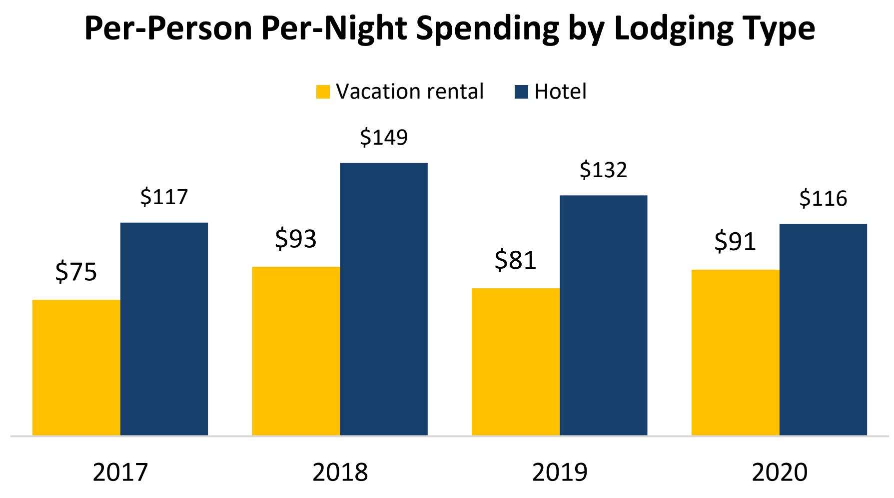
Question text: Including yourself, how many people were in your travel party? How many nights did you stay in Gulf Shores/Orange Beach during this trip? If you did not stay overnight, please enter '0'. Open-ended numeric responses.

Condo/vacation rental 2017 n=118; 2018 n=162; 2019 n=206; 2020 n= 122 (a)
Hotel/motel 2017 n=265; 2018 n=235; 2019 n=231; 2020 n= 214 (b)

Trip Characteristics

- Per-person per-night spending this fall outpaced 2019.
- The per-person efficiency of vacation rentals is one of the appeals for larger groups and longer stays. This year's per-person per-night spending for condos is up over 2019, while for hotels it is back down to 2017 levels. This is not necessarily a reflection of a negative trend; 2020 was just a strange year.

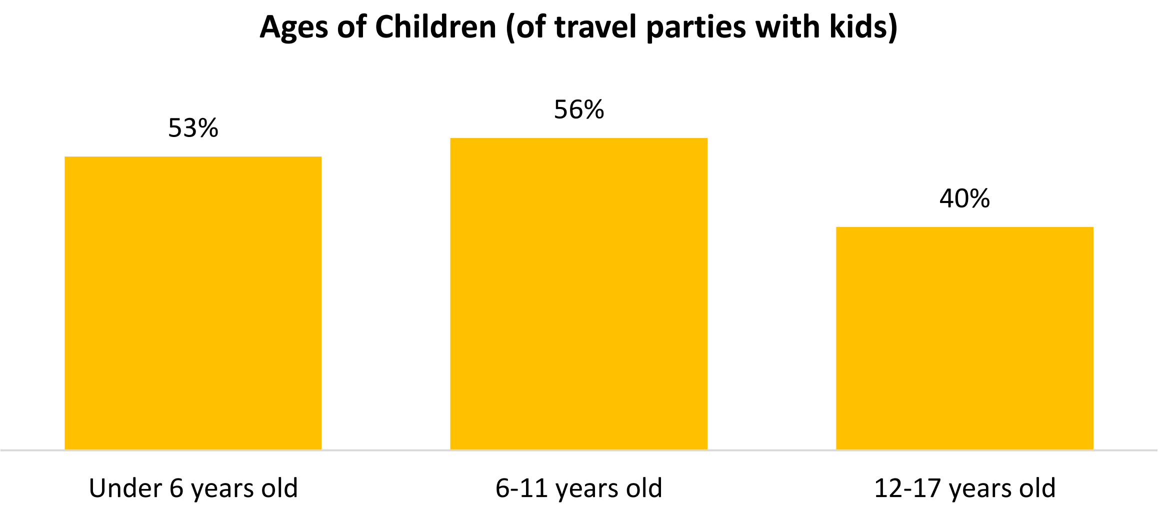




Question text: To help us better understand the economic impact of tourism, what was the approximate amount of money your travel party spent while in Gulf Shores/Orange Beach on your trip? [Category prompts]
Including yourself, how many people were in your travel party? How many nights did you stay in Gulf Shores/Orange Beach during this trip? If you did not stay overnight, please enter '0'. Open-ended numeric responses.
Condo/vacation rental 2017 n=118; 2018 n=162; 2019 n=206; 2020 n=122
Hotel/motel 2017 n=265; 2018 n=235; 2019 n=231; 2020 n=214

Travel Party Characteristics

- 40% of fall travel parties include children; more than half had kids 11 and under. This is lower than in summer, when 6 in 10 travel parties included kids.
- In prior years, fall visits have had a more even distribution of age groups among kids. In fall 2020, however, there was a decline in travel parties that included teens.



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

Travel Party Characteristics

- In terms of demographics, visitors look similar year-over-year.
- Fall visitors are older than summer visitors.
- Even so, fall visitor average age declined somewhat. This is likely due to older, more vulnerable travelers staying closer to home due to COVID-19.

Year-over-Year Demographic Profile Fall visitors		2017	2018	2019	2020
Age	Average	46	48	49	47
Marital status	Married	72%	72%	72%	74%
	Divorced/Separated	8%	9%	9%	9%
	Single/Never married	16%	16%	15%	14%
	Widowed	4%	3%	5%	2%
HH income	Average	$110,200	$119,571	$129,417	$127,224

2017 n=383; 2018 n=397; 2019 n=437; 2020 n=336

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 renters skew older than hotel stayers, and are more likely to be retired.
- The average income of both lodging groups was lower in 2020 than in 2019.
- As a result of GSOBT marketing efforts, 2019 saw gains in higher income and more diverse visitors compared to prior years. The visitor profile reverted somewhat in 2020.

Fall demographic profile by lodging type		2017		2018		2019		2020	
		Vacation rental/condo	Hotel	Vacation rental/condo	Hotel	Vacation rental/condo	Hotel	Vacation rental/condo (a)	Hotel (b)
Age	Average	46	44	48	48	49	47	48	46
Marital status	Married	77%	70%	71%	72%	76%	68%	75%	74%
	Divorced/Separated	9%	8%	11%	7%	10%	7%	8%	10%
	Single/Never married	12%	18%	16%	17%	10%	20%	15%	14%
	Widowed	3%	5%	2%	4%	5%	5%	2%	2%
HH income	Average	$115,231	$107,979	$114,957	$122,732	$128,758	$133,518	$124,447	$129,265
Education	College grad+	57%	56%	67%	64%	64%	66%	67%	69%
Occupation	Executive/upper management	14%	24%	12%	20%	16%	25%	16%	19%
	IT professional	11%	8%	5%	8%	3%	12%	11%	20%
	Educator	3%	3%	7%	8%	11%	4%	4%	3%
	Homemaker	7%	9%	9%	9%	13%	7%	6%	5%
	Student	1%	1%	1%	2%	0%	2%	1%	0%
	Small business owner	7%	5%	9%	4%	7%	5%	3%	6%
	Skilled trade/service	8%	9%	7%	9%	8%	13%	8%	10%
	Other	21%	17%	21%	16%	20%	16%	11%	18%
	Retired	25%	17%	28%	20%	20%	16%	33%	17%
	Not currently employed	3%	6%	1%	5%	1%	2%	7%	2%
Ethnicity	Caucasian/White	93%	86%	93%	84%	88%	75%	87%	88%
	African-American/Black	3%	5%	6%	10%	5%	13%	6%	4%
	Latino/Hispanic	3%	7%	2%	5%	4%	9%	6%	5%
	Asian	1%	4%	0%	4%	3%	8%	2%	2%
	American Indian	0%	1%	0%	3%	2%	3%	1%	4%
	Other	1%	1%	0%	1%	1%	1%	1%	1%

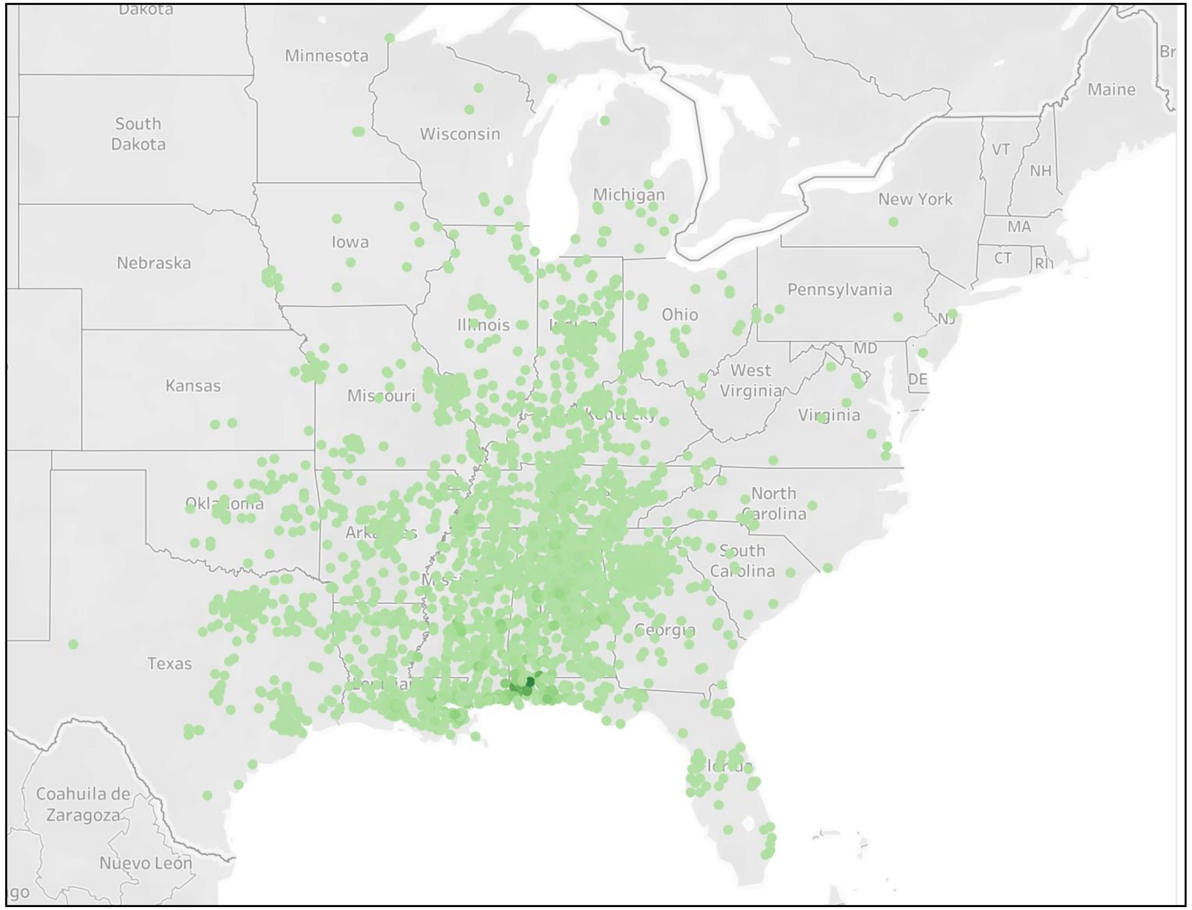
Travel Party Characteristics – New Visitors

- New visitors in 2020 have higher incomes than last year's new visitors, as we saw in summer, potentially as a result of other beaches being closed and continued impacts of the advertising campaign.
- New fall visitors this year are more educated than last year's new visitors, and more educated than repeat visitors. A higher share of new fall visitors are IT professionals. More fall visitors this year are unemployed.
- 2020 visitors are less ethnically diverse than 2019 visitors, overall and among new visitors.

Fall demographic profile of new visitors, 2019 and 2020		Repeat visitors		New visitors	
		2019	2020	2019	2020
Age	Average	50	48	46	46
Marital status	Married	73%	68%	63%	77%
	Divorced/Separated	9%	11%	9%	9%
	Single/Never married	13%	18%	24%	13%
	Widowed	4%	3%	5%	1%
HH income	Average	$128,981	$120,278	$121,495	$124,804
Education	College grad+	66%	65%	61%	76%
Occupation	Executive/upper management	18%	16%	23%	17%
	IT professional	8%	10%	6%	20%
	Educator	6%	4%	8%	3%
	Homemaker	8%	6%	10%	5%
	Student	1%	0%	2%	1%
	Small business owner	7%	5%	4%	5%
	Skilled trade/service	9%	9%	17%	8%
	Other	20%	17%	10%	18%
	Retired	22%	25%	21%	17%
	Not currently employed	2%	7%	0%	4%
Ethnicity	Caucasian/White	86%	88%	68%	84%
	African-American/Black	6%	6%	15%	4%
	Latino/Hispanic	5%	3%	13%	11%
	Asian	4%	3%	9%	3%
	American Indian	3%	3%	0%	2%

Travel Party Characteristics

- Heat map showing source markets of fall visitors

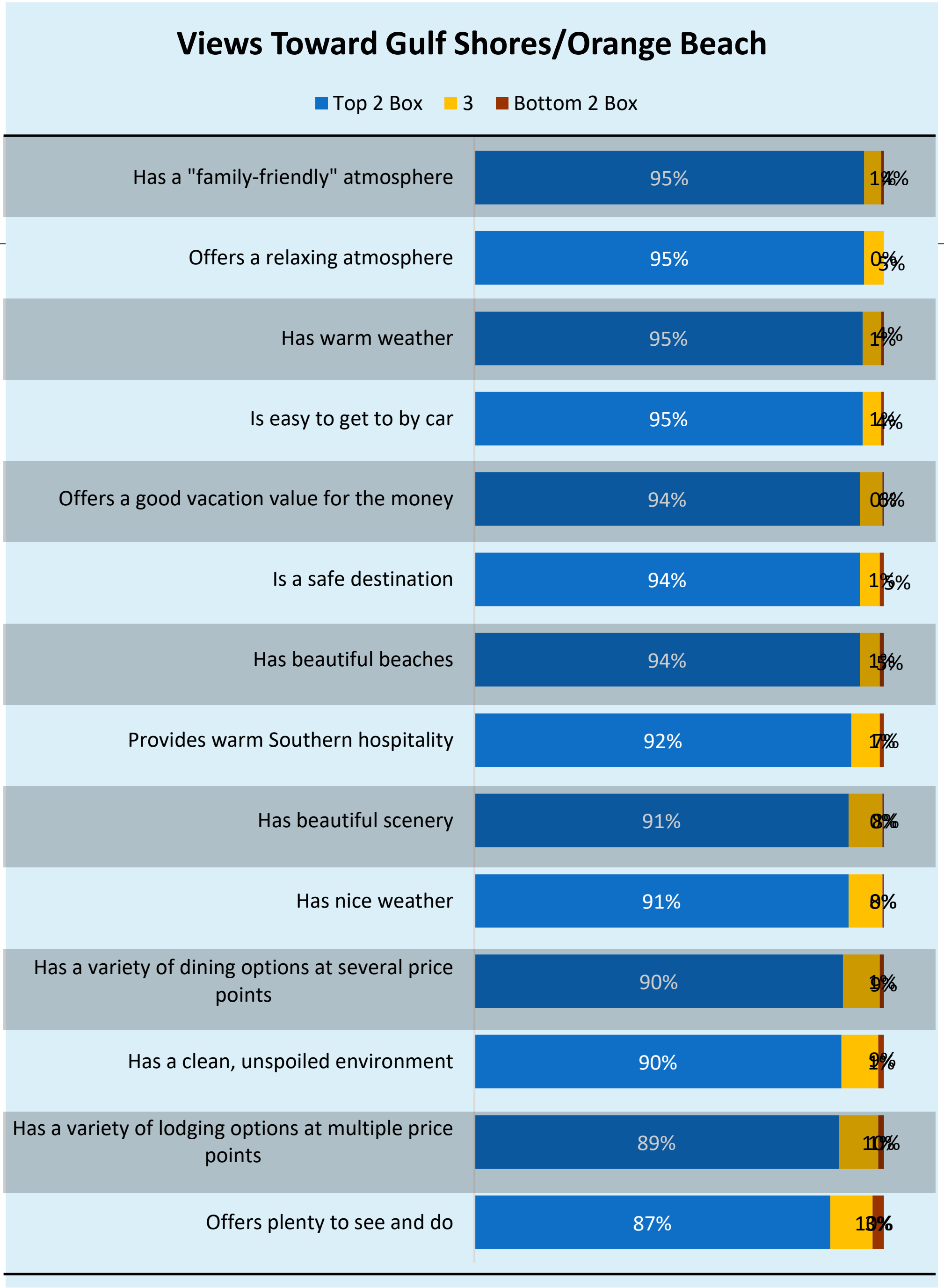


Data shown here is from Arrivalist mobile location data and includes both target and day visitors, Sep 1 – Nov 30, 2020.

	Fall 2020
Alabama	45%
Louisiana	15%
Mississippi	11%
Tennessee	7%
Florida	5%
Georgia	5%
Texas	2%
Indiana	2%
Arkansas	2%
Kentucky	2%
Missouri	1%

Views Toward GS/OB & Trip Satisfaction

- Ratings of GS/OB by fall visitors remain overwhelmingly positive.
- The most highly rated elements of the GS/OB fall experience are for being family-friendly and a relaxing atmosphere.
- Compared to last fall, ratings for scenery and weather are down several points, while there is a 5-point lift in views of the area's array of things to see and do.

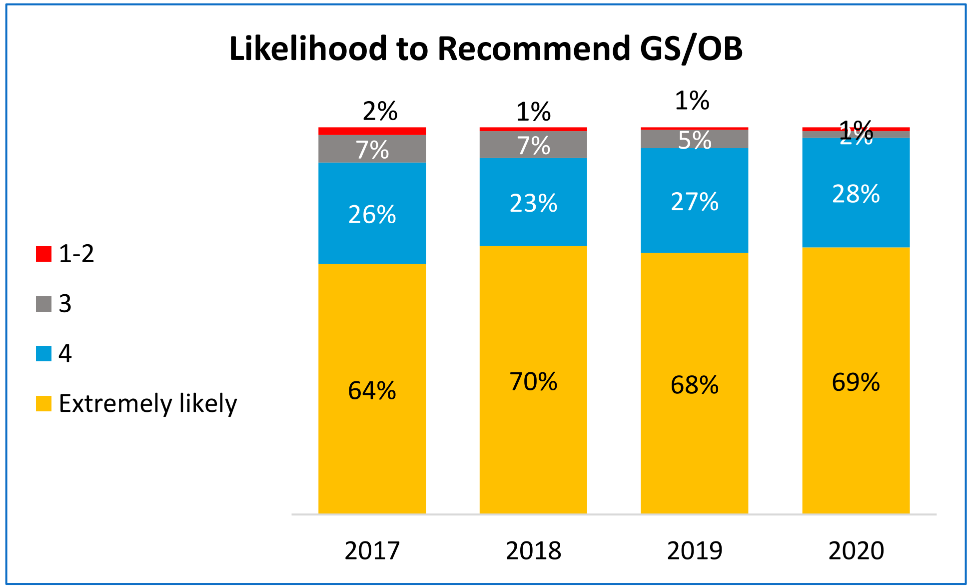


Fall 2019 top 2 box
93%
95%
95%
94%
93%
95%
95%
93%
95%
94%
91%
89%
90%
92%

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

Views Toward GS/OB & Trip Satisfaction

- Likelihood to recommend GS/OB among both lodging types is higher than ever before.
- High likelihood to recommend is consistent with the high levels of agreement with the area's positive image attributes.



How likely are you to recommend Gulf Shores/Orange Beach to your friends or family as a destination to visit for a leisure trip? Fall visitors	**2017 Top 2 Box %**	**2018 Top 2 Box %**	**2019 Top 2 Box %**	**2020 Top 2 Box %**
Vacation rental/condo	91%	94%	96%	98%
Hotel	90%	93%	94%	96%

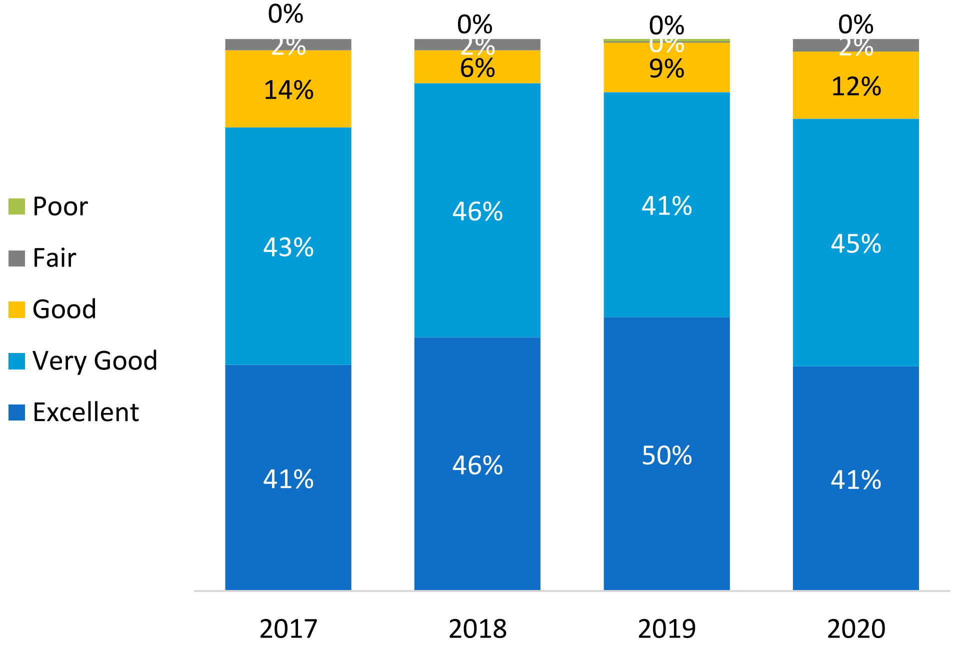
Condo/vacation rental 2017 n=118; 2018 n=162; 2019 n=206; 2020 n= 122 (a)
Hotel/motel 2017 n=265; 2018 n=235; 2019 n=231; 2020 n= 214 (b)

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. Four in 10 fall visitors rate their service as excellent, which is higher than in summer but lower than in recent falls.
- There is minimal negative feedback (poor or fair ratings), but in addition to fewer excellent ratings, there are more good ratings, which is a more neutral response. As in summer, much of this is related to public health:
  - “Went to one restaurant that had outdoor seating but we had to leave before the food came out because they weren't observing covid seating restrictions. We took our food to go, and the food wasn't great.”
  - “No mask mandates, poor food service at restaurants, poor maintenance of condos”
  - “Average. People on edge with the hurricane coming.”
  - “In the ongoing pandemic we all are having a bad time and disturbing time. Their service was good in this hard situation.”
  - “Some stores seemed aggravated to be open”
  - “Many things still closed or limited”

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

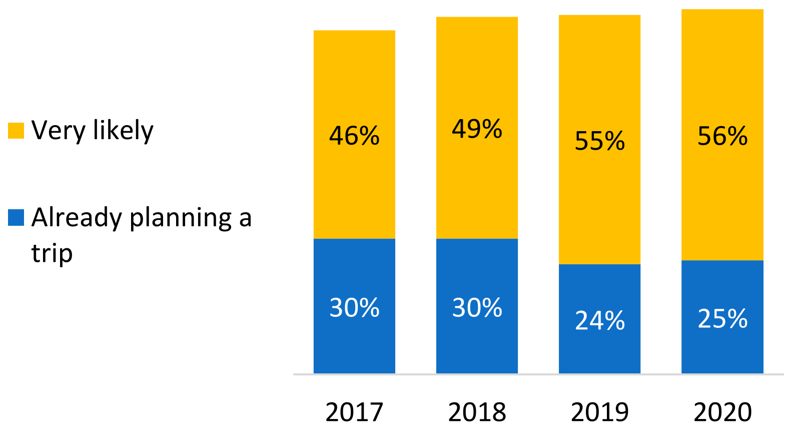


Question text: Overall, how would you rate the quality of the service you received at stores, restaurants, attractions, and lodging establishments in Gulf Shores/Orange Beach? Response options: Poor, fair, good, very good, excellent

Views Toward GS/OB & Trip Satisfaction

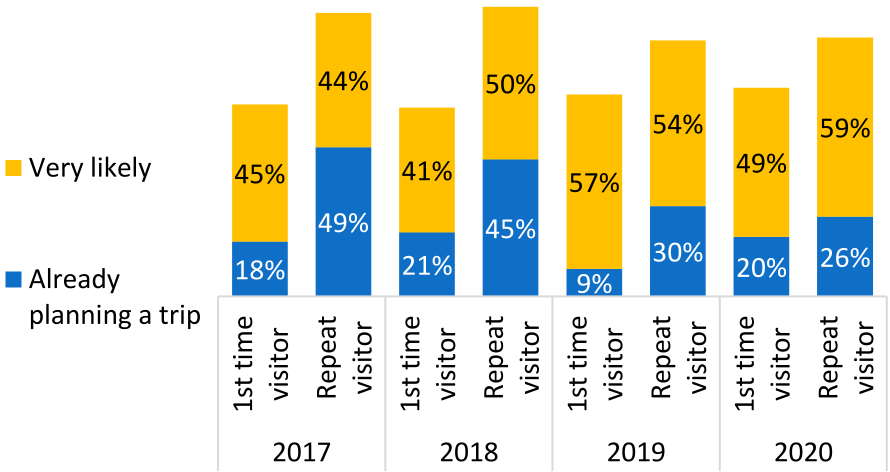
- Likelihood to return to GS/OB remains high, with a quarter already planning a return trip. GS/OB marketing has brought in new visitors, and younger visitors. Our experience is that Millennial travelers are less likely than older travelers to return to the same destination year after year. Repeat visitors are more likely to be planning another return, and those already planning a return have visited many times.

Likely to Return to GS/OB in the Next Year



Of those already planning a return trip to GS/OB:	
I go there every year	52%
I've been many times and know it will deliver the vacation I want	51%
I have family and friends there	29%
I've always wanted to go there	12%

Likelihood to Visit GS/OB in the Next Year

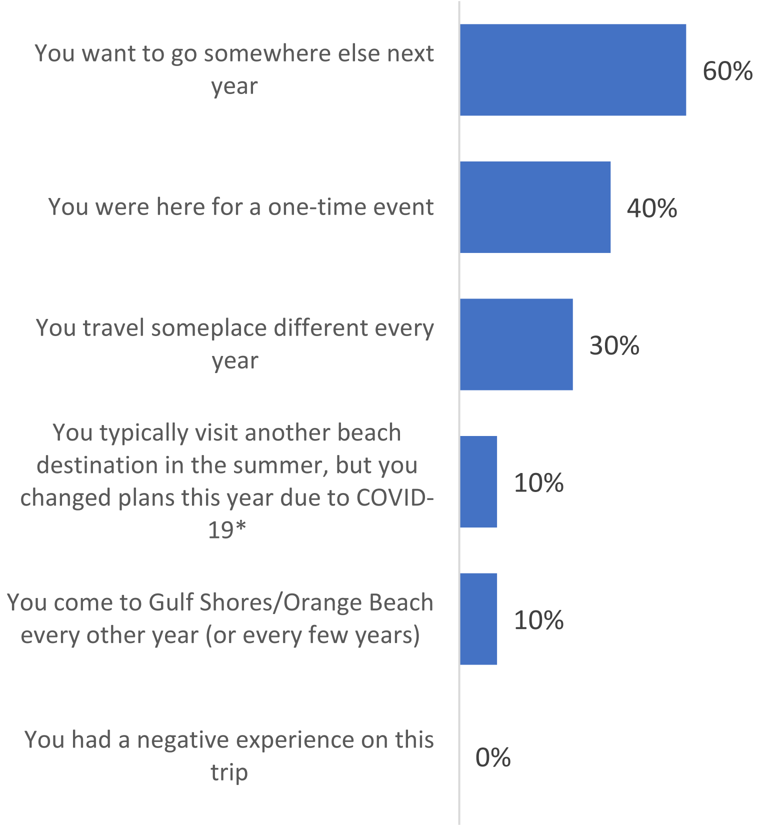


Question text: How likely are you to visit Gulf Shores/Orange Beach in the next year? Response options: Not at all likely, not very likely, somewhat likely, very likely, already planning a trip

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=10).
- 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.
- No fall visitors said that a negative experience was the reason for not returning.
- *Amelia Island, FL was the destination specifically named whose closure influenced a travel party to come to GS/OB this year. However, most other beach destinations were closed, particularly those in Florida.

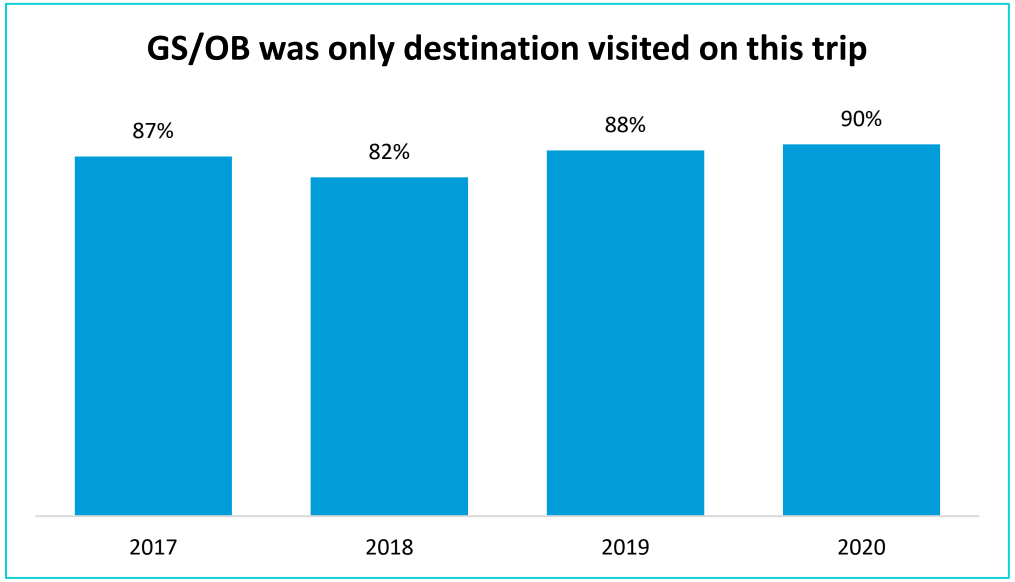
Would you say that the reason you are not likely to return next year is… ?

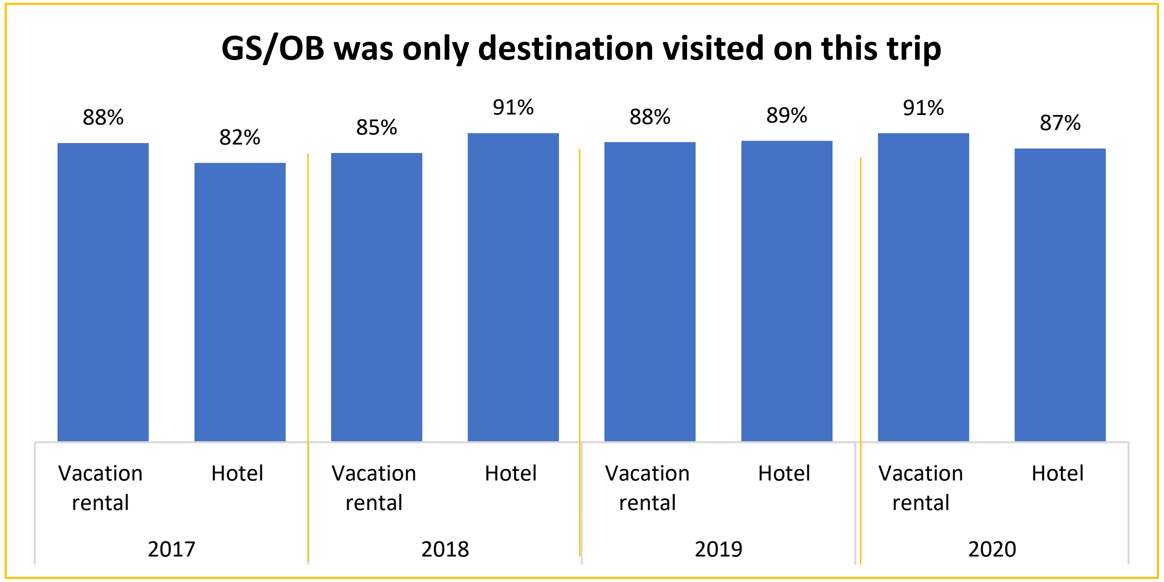


Question text: Would you say that the reason you are not likely to return next year is… ?
Response options as shown in graph above.

Destinations Visited

- Nearly all fall trips included only GS/OB.
- Hotel stayers are marginally more likely to have included other places in their fall 2020 trip.





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

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

Welcome Center Supplemental Analysis

Visitor Profile Research – Fall 2020

Welcome Center Impact

- When looking at data to find differences between respondent groups, it's important that we keep in mind the context of what we are looking for and apply a common-sense test – what is it reasonable to believe the Welcome Center can impact?
- For example, the Welcome Center has less opportunity to impact length of stay than it does to impact what people do and where they go during their trip. Length of leisure travel is often decided ahead of time and no matter how much visitors might like to, extending a stay is not always feasible.

Fall 2020 visits	No Welcome Center (a)	Visited Welcome Center (b)
Length of stay	3.7	4.2
# of activities on trip	4.9	7.2

- In fact, among spring and summer visitors we tend to see that visitors who went to a GSOBT Welcome Center on their trip stayed about the same amount of time in the destination. However, we do see longer fall stays among Welcome Center visitors, but care must be taken not to attribute the longer stays to center visitation. Rather, those who stay longer may take the time to visit the center to learn more about the destination.
- Welcome Center visitors participated in more activities. This makes sense, given that activities and attractions are promoted at the centers.

Impact on Spending

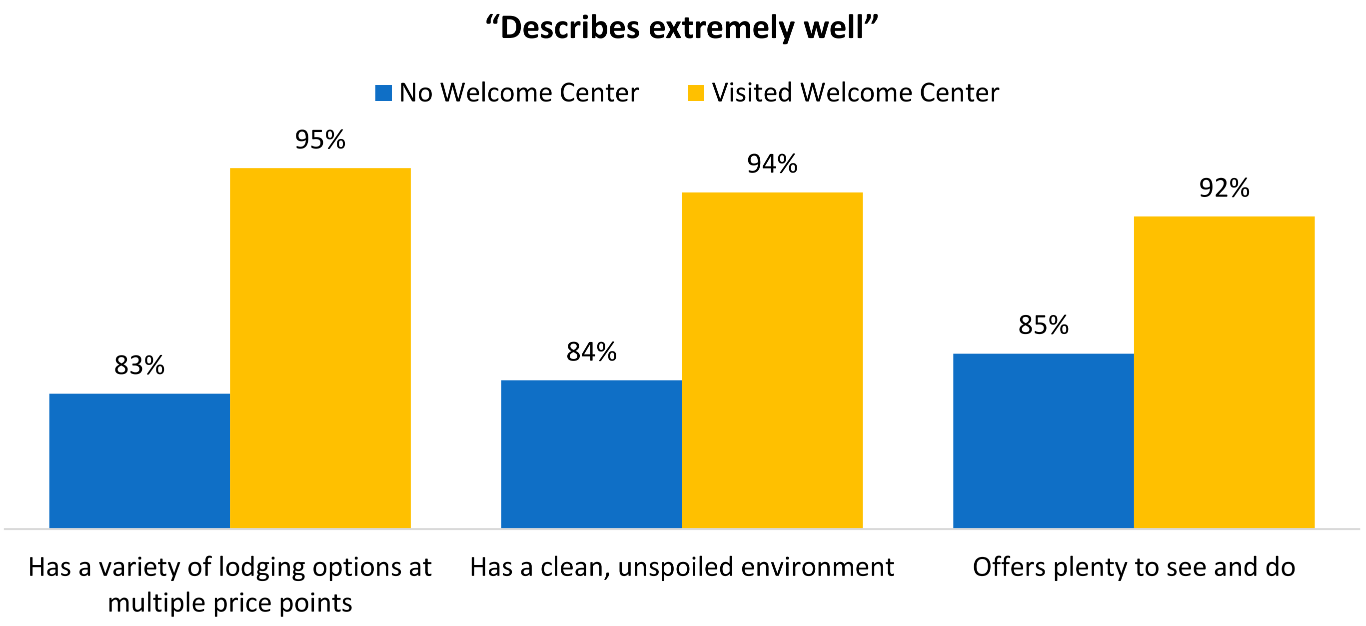
- Welcome Center visitors spent twice as much on recreation and two-and-a-half times as much on shopping than those who didn't visit a center.
- As we tend to see, lodging expenditures are lower among Welcome Center visitors due to these visitors being generally new to GS/OB and more likely hotel stayers, with lower lodging spending.
- Again, this makes sense. While lodging decisions and length of stay are typically decided ahead of time, outings, shopping and entertainment are often not pre-planned when visiting a place for leisure. So Welcome Centers have more opportunity to impact these metrics.

Trip spending	No Welcome Center	Visited Welcome Center
Lodging	$1,002 [a]	$520
Meals/food/groceries	$273	$248
Shopping	$164	$442
Recreation or entertainment	$71	$141 [b]
Transportation within Gulf Shores	$170	$140 [b]
Other	$28	$90 [b]
Total	**$1,708**	**$1,581**

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

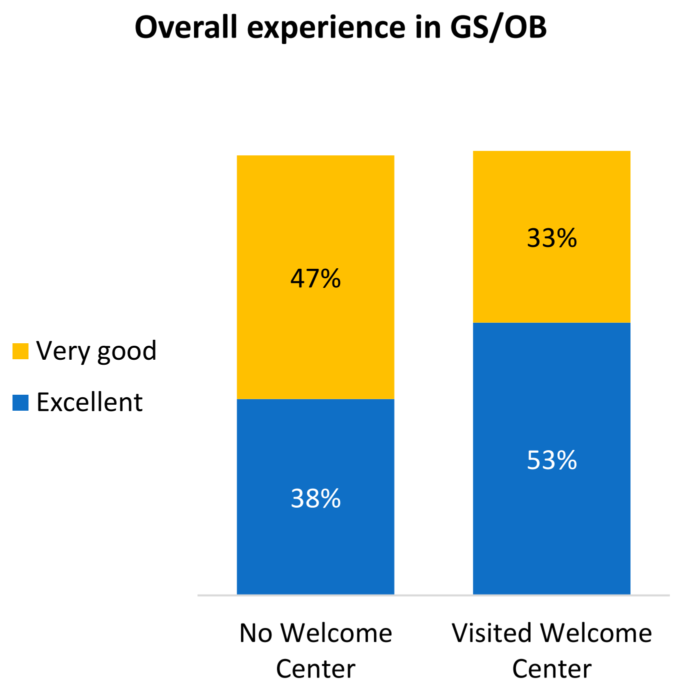
Impact on Image

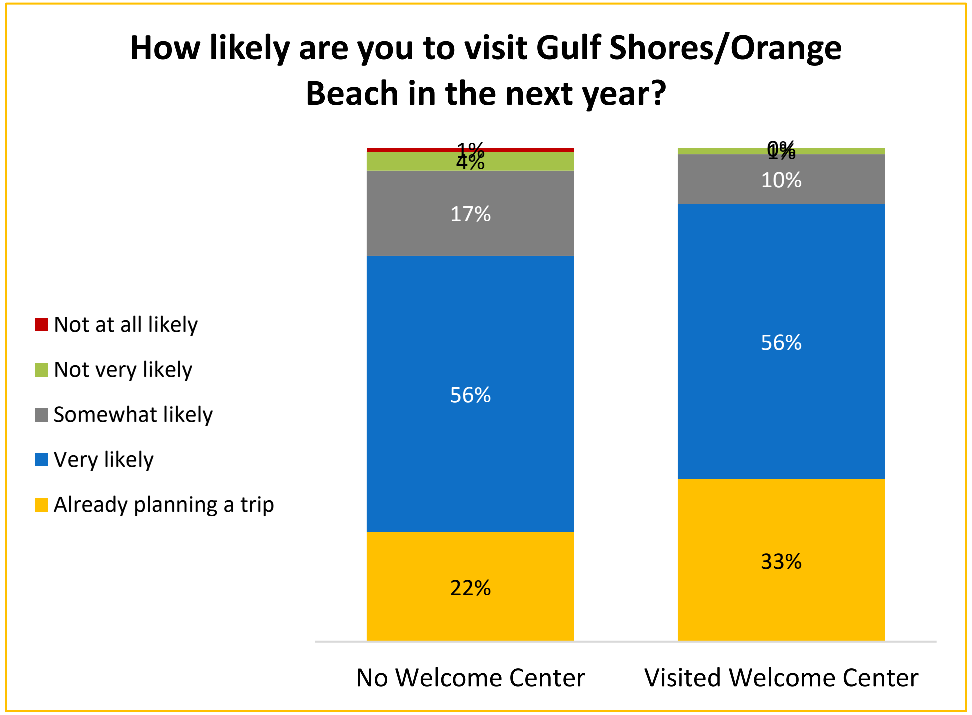
- Welcome Center visitors have higher agreement with statements describing GS/OB's clean, unspoiled environment, array of lodging options, and variety of things to see and do. This is in line with 2019 data.



Impact on Experience and Intent to Return

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





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

Appendix

Visitor Profile Research – Fall 2020

Comparing Target to Other Travelers

- This fall, day trippers have visited an average of 3 times per year. By comparison, summer day trippers had visited just twice a year on average.
- These non-target day trips exclude local residents. Visitors from Pensacola are included.
- We also employed screening questions to ensure that day visitors are coming to Gulf Shores/Orange Beach for leisure, rather than for work.

Non-target FALL Day trips	2017	2018	2019	2020
Average # visits/year	4.6	5.3	3.6	3.0
First time trips	34%	27%	31%	17%

2017 day trip n=107; 2018 day trip n=59; 2019 day trip n=100; 2020 day trip n=143

Comparing Target to Other Travelers

Began planning summer 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)
< 1 week before trip	6%	32%	5%	46%	3%	56%	7%	62%
1-2 weeks	12%	10%	11%	14%	10%	16%	13% [a]	20%
3 weeks - 1 month	24%	20%	18%	14%	20%	13%	24%	11% [b]
2 - 3 months	27%	21%	32%	20%	30%	8%	32%	3% [b]
4-6 months	17%	5%	18%	0%	23%	6%	14%	2% [b]
6+ months	14%	12%	16%	7%	12%	1%	10% [a]	1% [b]

GS/OB is only destination visited on this 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)
	87%	75%	82%	76%	89%	90%	90% [a]	78%

2017 target n=383, day trip n=107; 2018 target n=397, day trip n=59; 2019 target n=437, day trip n=100; 2020 target n=336 (a), day trip n=143 (b)
a / b indicate statistically significant differences at the 95% level.

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

Comparing Target to Other Travelers

Resources used to plan GS/OB trip	2017		2018		2019		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	34%	39%	36%	32%	29%	24%	34% a	24%
Traveler review sites or apps	16%	12%	21%	8%	19%	12%	17% a	14%
Social media	14%	11%	19%	12%	16%	10%	13% a	1%
Hotel websites	20%	16%	26%	20%	20%	9%	17% a	8%
Gulf Shores & Orange Beach Tourism website	17%	11%	21%	12%	20%	8%	24% a	9%
Vacation home rental booking sites/apps	35%	8%	34%	3%	31%	8%	20% a	2%
Travel/visitor guide	12%	11%	12%	14%	14%	8%	9% a	6%
Booking websites or apps	18%	14%	24%	7%	23%	7%	49% a	3%
Alabama's official tourism website	12%	7%	10%	3%	10%	6%	10% a	3%
Travel advice websites or apps	11%	5%	16%	8%	15%	5%	18% a	6%
Local vacation rental company sites	19%	7%	16%	5%	18%	4%	5%	3%
Magazine and newspaper articles	6%	4%	7%	2%	5%	4%	12%	6%
Travel blogs	9%	5%	4%	3%	6%	3%	3%	3%

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

2017 target n=383, day trip n=107; 2018 target n=397, day trip n=59; 2019 target n=437, day trip n=100; 2020 target n=336 (a), day trip n=143 (b)
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	39%	50%	41%	11%	44%	26%	42% [a]	25%
Of trips with children: *2017 target n=13, day trip n=2; 2018 target n=143, day trip n=4; 2019 target n=170, day trip n=19*								
< 6 years old	35%	22%	49%	67%	50%	42%	53%	38%
6-11 years old	44%	44%	50%	33%	50%	47%	56%	45%
12-17 years old	52%	56%	47%	33%	47%	26%	40%	62% [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	83%	81%	89%	95%	83%	88%	92%	94%
Airplane	14%	13%	10%	3%	14%	9%	2%	3%
Bus	3%	6%	1%	2%	1%	2%	4%	1%
Other*	0%	0%	0%	0%	1%	2%	2%	1%

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

2017 target n=383, day trip n=107; 2018 target n=397, day trip n=59; 2019 target n=437, day trip n=100; 2020 target n=336 (a), day trip n=143 (b)
a / b indicate statistically significant differences at the 95% level.
* Includes boat

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	4.6	3.1	4.1	3.6	4.2	2.2	4.4 [a]	2.5

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	$802	$ -	$892	$ -	$812	$ -	$928	$ -
Meals/food/groceries	$381	$155	$397	$144	$333	$109	$347 [a]	$90
Shopping	$259	$130	$347	$89	$260	$124	$242 [a]	$116
Recreation or entertainment	$175	$116	$184	$59	$143	$74	$101 [a]	$35
Transportation within Gulf Shores	$70	$64	$74	$23	$53	$56	$75	$376
Other	$43	$28	$36	$30	$37	$6	$42	$27
TOTAL	$1,729	$493	$1,930	$345	$1,638	$369	$1,734	$644
Per person spending	**$377**	**$157**	**$471**	**$95**	**$388**	**$166**	**$397**	**$254**

2017 target n=383, day trip n=107; 2018 target n=397, day trip n=59; 2019 target n=437, day trip n=100; 2020 target n=336 (a), day trip n=143 (b)
a / b indicate statistically significant differences at the 95% level.

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

Comparing Target to Other Travelers

Demographics		2017		2018		2019		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)
Age	Average	46	46	48	53	48	59	47	50
Marital status	Married	72%	58%	72%	75%	72%	62%	74% [a]	54%
	Divorced/Separated	8%	21%	9%	8%	8%	13%	9%	16%
	Widowed	4%	1%	3%	5%	5%	4%	2%	5%
	Single/Never married	16%	20%	16%	12%	16%	20%	14%	25% [b]
HH income	Average	$110,200	$88,627	$119,571	$109,102	$129,417	$93,011	$127,224	$100,722

2017 target n=383, day trip n=107; 2018 target n=397, day trip n=59; 2019 target n=437, day trip n=100; 2020 target n=336 (a), day trip n=143 (b)
a / b indicate statistically significant differences at the 95% level.

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

Comparing Target to Other Travelers

Top 2 Box	2017		2018		2019		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)
Is easy to get to by car	92%	75%	91%	86%	94%	93%	94%	91%
Has beautiful scenery	91%	79%	93%	80%	95%	93%	95%	91%
Is a safe destination	90%	76%	95%	83%	95%	91%	95%	90%
Has a variety of dining options at several price points	88%	69%	90%	80%	91%	91%	91%	84%
Has warm weather	92%	78%	95%	90%	95%	91%	95%	90%
Provides warm Southern hospitality	90%	72%	91%	76%	93%	89%	93%	91%
Offers a relaxing atmosphere	92%	84%	93%	81%	95%	87%	95%	86%
Has beautiful beaches	92%	78%	94%	80%	95%	87%	95%	85%
Has a “family-friendly” atmosphere	91%	79%	95%	83%	93%	87%	93%	91%
Has nice weather	91%	79%	94%	80%	94%	87%	94%	91%
Has a variety of lodging options at multiple price points	87%	72%	89%	71%	90%	87%	90%	75%
Offers plenty to see and do	86%	71%	85%	80%	92%	84%	92%	86%
Has a clean, unspoiled environment	82%	71%	85%	75%	89%	78%	89%	73%
Offers a good vacation value for the money	84%	69%	87%	68%	93%	78%	93%	75%

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

2017 target n=383, day trip n=107; 2018 target n=397, day trip n=59; 2019 target n=437, day trip n=100; 2020 target n=336 (a), day trip n=143 (b)
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	**89%**	**69%**	**93%**	**68%**	**91%**	**84%**	**85%**	**76%**
5 (Excellent)	51%	35%	53%	36%	50%	58%	43%	34%
4 (Very good)	38%	35%	40%	32%	41%	26%	42%	43%
3 (Good)	9%	26%	6%	31%	9%	13%	14%	19%
2 (Fair)	2%	3%	1%	2%	0%	2%[a]	1%	3%
1 (Poor)	0%	2%	0%	0%	0%	1%	0%	2%

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	**90%**	**77%**	**94%**	**80%**	**95%**	**84%**	**97%**	**86%**
5 (Extremely likely)	70%	50%	74%	58%	70%	60%	69%[a]	57%
4	21%	26%	19%	22%	24%	24%	28%	30%
3	6%	16%	6%	14%	5%	9%	2%	12%[b]
2	3%	3%	0%	5%	0%	2%	1%	0%
1 (Not at all likely)	0%	5%	0%	2%	0%	4%	0%	1%

2017 target n=383, day trip n=107; 2018 target n=397, day trip n=59; 2019 target n=437, day trip n=100; 2020 target n=336 (a), day trip n=143 (b)
a / b indicate statistically significant differences at the 95% level.

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

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

Comparing Target to Other Travelers

Likelihood to visit again in the next year	2017		2018		2019		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)
Likely to return (top 2 box)	**82%**	**66%**	**80%**	**76%**	**82%**	**78%**	**81%**	**81%**
5 (Already planning a trip)	41%	21%	37%	19%	28%	18%	25%	22%
4 (Very likely)	42%	46%	43%	58%	54%	60%	56%	59%
3 (Somewhat likely)	11%	19%	13%	15%	14%	18%	16%	14%
2 (Not very likely)	4%	9%	6%	7%	3%	2%	3%	4%
1 (Not at all likely)	3%	6%	1%	2%	1%	1%	0%	1%

During which season(s) would you be most likely to visit (of those likely to visit)	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)
Spring	33%	38%	33%	43%	44%	70%	37%	48%
Summer	51%	52%	43%	54%	41%	33%	56%	68%
Fall	*59%*	*42%*	*61%*	*44%*	*65%*	*56%*	52%	52%
Winter	15%	19%	10%	20%	16%	21%	10%	26% b

2017 target n=383, day trip n=107; 2018 target n=397, day trip n=59; 2019 target n=437, day trip n=100; 2020 target n=336 (a), day trip n=143 (b)
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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	21%	18%	21%	32%	44%	42%	26% a	30%
Georgia	8%	4%	7%	5%	5%	2%	16% a	6%
Tennessee	11%	8%	9%	5%	8%	0%	14%	1% b
Florida	11%	25%	10%	22%	7%	36%	17%	41%
Louisiana	9%	6%	9%	7%	7%	2%	11%	6% b
Texas	11%	13%	9%	15%	3%	7%	3%	0%
Mississippi	6%	3%	7%	10%	7%	7%	6%	14%
Indiana	5%	6%	2%	0%	3%	0%	2%	0%
Missouri	4%	1%	2%	0%	2%	0%	2%	0%
Illinois	2%	3%	2%	0%	1%	2%	1%	0%
Michigan	2%	2%	2%	0%	1%	0%	1%	1%
Wisconsin	0%	3%	1%	0%	0%	0%	1%	0%
Arkansas	3%	1%	4%	0%	2%	2%	1%	1%

2017 target n=383, day trip n=107; 2018 target n=397, day trip n=59; 2019 target n=437, day trip n=100; 2020 target n=336 (a), day trip n=143 (b)
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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)
Dining out	59%	34%	66%	44%	67%	39%	60%[b]	34%
Beaches	64%	33%	74%	42%	69%	30%	73%[b]	31%
Shopping	49%	26%	57%	20%	47%	29%	42%[b]	31%
Relaxing	56%	35%	64%	37%	66%	25%	62%[b]	21%
Sightseeing	29%	23%	34%	20%	29%	14%	28%[b]	13%
Photography	11%	9%	15%	10%	11%	6%	15%	10%
Visiting friends/relatives who live in the area	8%	12%	10%	12%	13%	8%	10%	9%
Watching wildlife	13%	12%	16%	8%	15%	8%	19%[b]	8%
Swimming	48%	25%	45%	15%	37%	4%	43%[b]	8%
Family/friends reunion	13%	8%	10%	14%	7%	4%	5%	6%
Hiking on trails	9%	7%	9%	8%	8%	4%	14%[b]	6%
Shelling	16%	9%	15%	10%	16%	8%	24%[b]	6%
Festivals or special events (non-sports events)	7%	4%	9%	3%	10%	6%	2%	5%
Birdwatching	6%	2%	8%	7%	5%	4%	9%	4%
Concerts and nightlife	13%	7%	10%	5%	11%	7%	5%	4%
Dolphin tour	10%	7%	10%	3%	11%	4%	6%	4%
Exercise/working out	14%	7%	10%	10%	11%	7%	18%[b]	4%
Historical sites	12%	8%	12%	5%	13%	6%	10%[b]	4%
Bicycle riding	5%	7%	7%	2%	5%	4%	9%[b]	3%
Golfing	8%	5%	6%	3%	9%	2%	7%	3%
Fishing	18%	7%	15%	5%	8%	4%	17%[b]	3%
Boating or sailing	8%	4%	9%	7%	6%	5%	8%[b]	2%
Parasailing/jet skiing	6%	4%	4%	3%	4%	2%	4%	2%
Sporting events	4%	3%	6%	0%	6%	4%	2%	2%
Tennis	6%	1%	2%	0%	2%	4%	4%	2%
Visiting a spa	9%	6%	6%	3%	6%	2%	4%	2%
Kayaking/canoeing/paddle boarding	10%	5%	6%	5%	7%	1%	4%	1%
Scuba diving/snorkeling	3%	3%	6%	2%	4%	3%	6%[b]	1%

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

2017 target n=383, day trip n=107; 2018 target n=397, day trip n=59; 2019 target n=437, day trip n=100; 2020 target n=336 (a), day trip n=143 (b)
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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	8%	5%	9%	3%	9%	4%	4%	2%
Alabama Gulf Coast Zoo	10%	6%	9%	2%	8%	5%	6%	4%
Alabama's Coastal Connection Scenic Byway	9%	2%	10%	0%	8%	3%	7%	5%
Battleship USS Alabama	7%	4%	8%	0%	10%	6%	3%	3%
Bellingrath Gardens	5%	1%	3%	2%	4%	2%	3%	1%
Bon Secour National Wildlife Refuge	6%	1%	5%	0%	6%	4%	3%	2%
Dauphin Island	13%	6%	11%	7%	11%	7%	15%[b]	4%
Fort Morgan Historic Site	10%	4%	7%	5%	13%	3%	10%	5%
Gulf State Park	16%	4%	17%	5%	20%	6%	12%[b]	3%
Hugh S. Branyon Backcountry Trail	6%	1%	3%	0%	2%	4%	3%	3%
National Naval Aviation Museum	4%	3%	6%	2%	8%	7%	3%	3%
OWA Park	2%	5%	4%	3%	3%	5%	4%	3%
Tanger Outlets	26%	10%	30%	15%	29%	22%	26%[b]	15%
The Track	10%	0%	8%	2%	5%	2%	7%[b]	1%
The Wharf	14%	9%	17%	5%	18%	4%	15%[b]	3%
Waterville	3%	3%	3%	2%	5%	1%	2%	2%

2017 target n=383, day trip n=107; 2018 target n=397, day trip n=59; 2019 target n=437, day trip n=100; 2020 target n=336 (a), day trip n=143 (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.