



**GULF SHORES &
ORANGE BEACH
TOURISM**

Alabama's White-Sand Beaches

Visitor Profile Research

Winter 2020-21

Strategic Marketing & Research Insights LLC

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Introduction

Visitor Profile Research – Winter 2020-21

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. This report is the final seasonal report covering 2020.
- While GS/OB has been open since April 30, 2020, some other beach destinations were closed intermittently or throughout the pandemic. Along with uneasiness around travel, this has caused shifts in typical winter visitation. Additionally, COVID-19 vaccines were administered first to older residents in most states, and this is the primary demographic that visits GS/OB in winter. Anecdotally, GSOBT partners have observed that while snowbird travelers did visit this winter, they were generally more cautious and less active – with less dining out and activity participation than in a typical winter. ADR is higher than in prior winters for hotel and condo/vacation rental properties; occupancy is not wildly different from prior years.
- 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 winter 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 winters



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

Methodology

- This report presents information collected through online surveys of visitors to Gulf Shores, Orange Beach or Fort Morgan during winter 2020-21 (December through February).
- Potential respondents were screened to ensure they were travelers to the Gulf Shores/Orange Beach area and were at least 25 years of age.
- Travelers were asked about multiple trips.
- Target data is weighted to match the destination’s actual occupancy rates (hotel and vacation rental) over the relevant time period, which is 84% condo/vacation rental and 16% hotel.
- Surveys were conducted in the markets which mobile location data indicated were home markets for devices that spent time in the Gulf Shores/Orange Beach area during the winter months. Surveying in visitor origin markets is a virtual intercept methodology that enables the research to locate visitors when their trip is complete. Additionally, survey invitations were posted to GSOBT’s social media feed to augment data collection.

Number of trips represented in the data	Winter 2020-21
Target trips (stayed 1-30 nights in paid accommodations)	407
Non-target trips (visited but did not stay overnight)	142



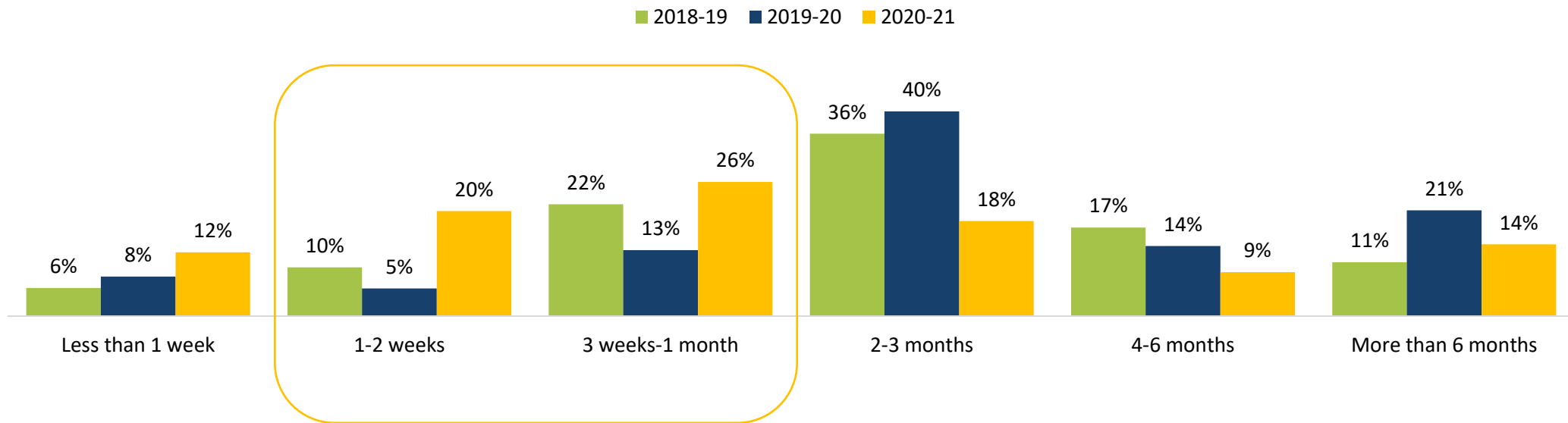
Detailed Findings

Visitor Profile Research – Winter 2020-21

Travel Planning

- Typically, winter trips are planned 2 to 6 months in advance. This winter there was a shift toward a much shorter planning horizon, with almost half planned just 1 to 4 weeks ahead of travel. During the pandemic and following the fall weather, consumers may be planning closer to the time of travel in order to ensure their planned visits are possible.

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

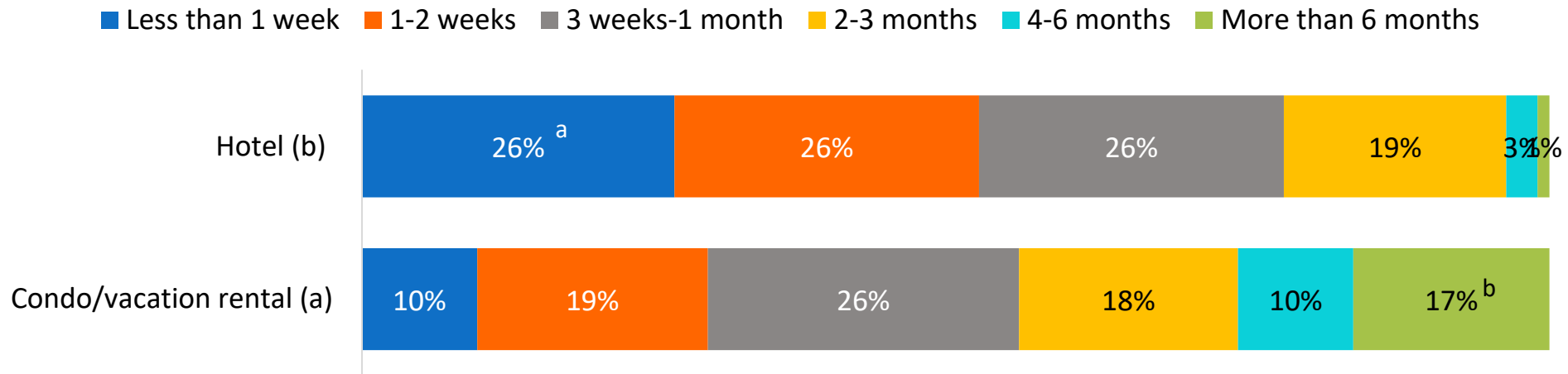


Question text: How far in advance did you begin planning your trip to Gulf Shores/Orange Beach? Response options as shown in graph above.

Travel Planning – Hotel vs. Condo Rental

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

Winter Trip Planning Horizon by Lodging Type

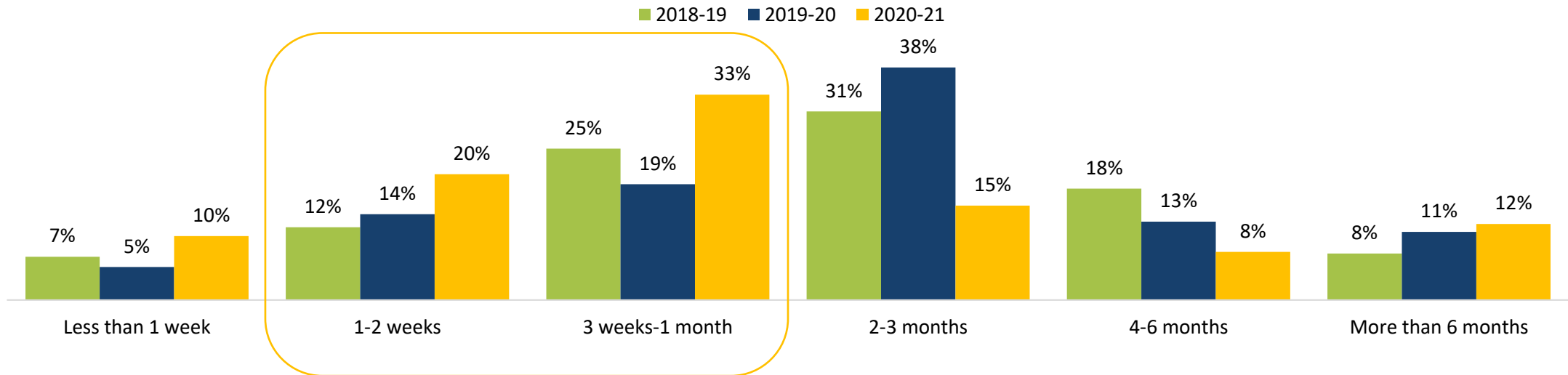


Vacation rental/condo n=103 (a); Hotel/motel n=304 (b); a / b indicate statistically significant differences at the 95% level.
Question text: How far in advance did you begin planning your trip to Gulf Shores/Orange Beach? Response options as shown in graph above.

Travel Planning – Lodging Bookings

- Like planning, booking is happening closer to the time of travel. More than half of winter visitors began planning and booked their lodging just 1 to 4 weeks ahead of their GS/OB trip.

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

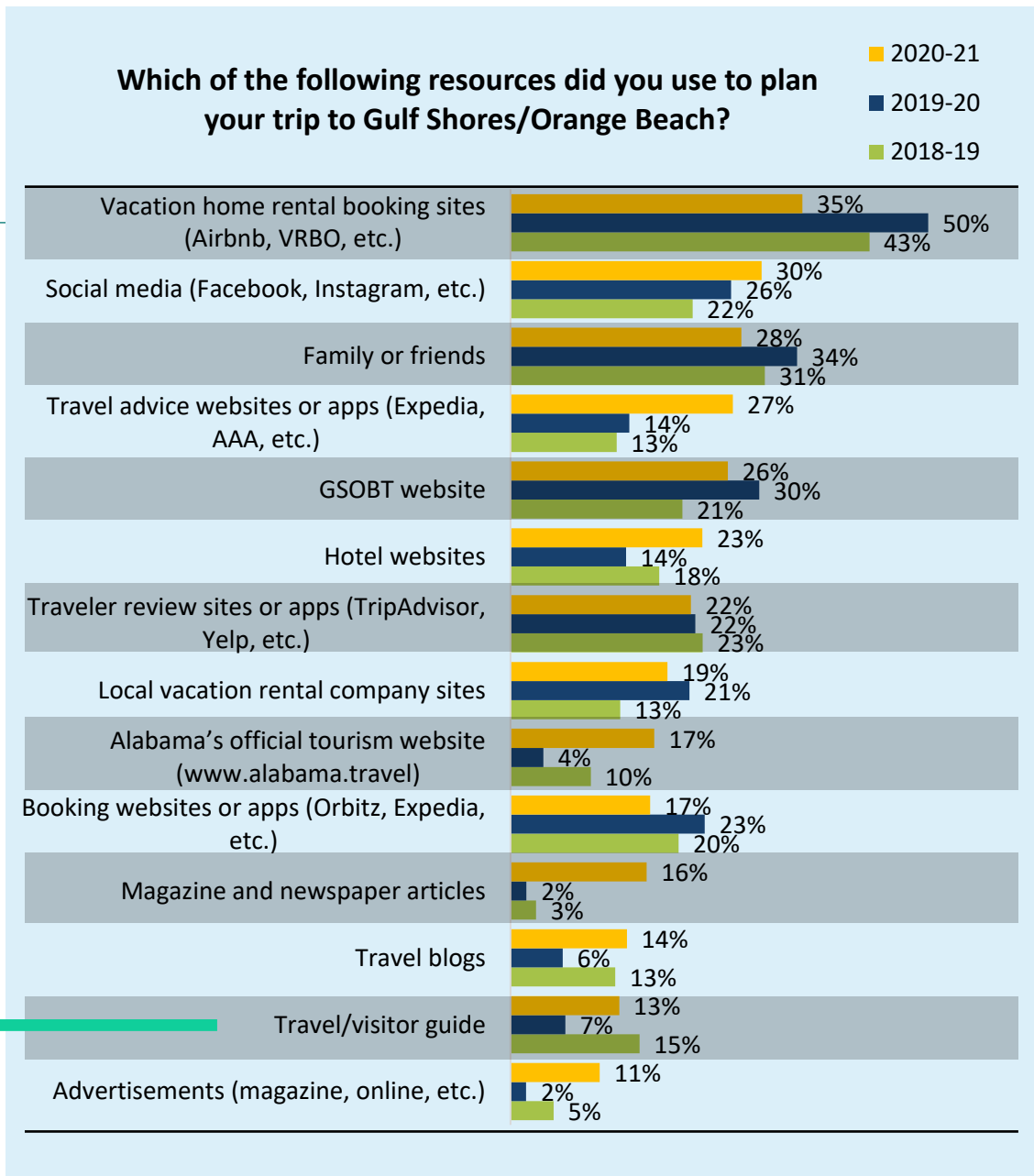
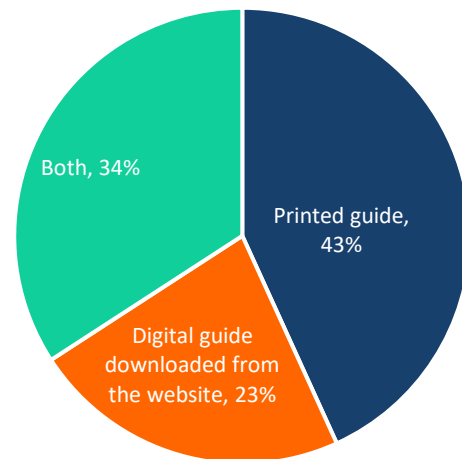


Question text: How far in advance did you book your lodging in Gulf Shores/Orange Beach? Response options as shown in graph above.

Travel Planning – Resources Used

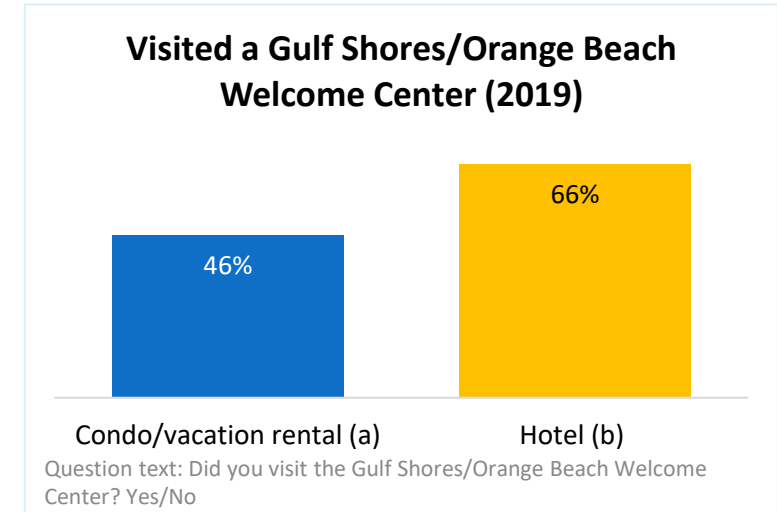
- Travel planning resources were more evenly used than in winters past, with fewer relying on home rental and booking sites, and more using social media, travel advice sites, and hotel sites.
- Visitor guide usage remains relatively low, although it is higher than last winter. Most who used this resource used the printed guide, with or without the digital version.

Visitor Guide format (2020-21)

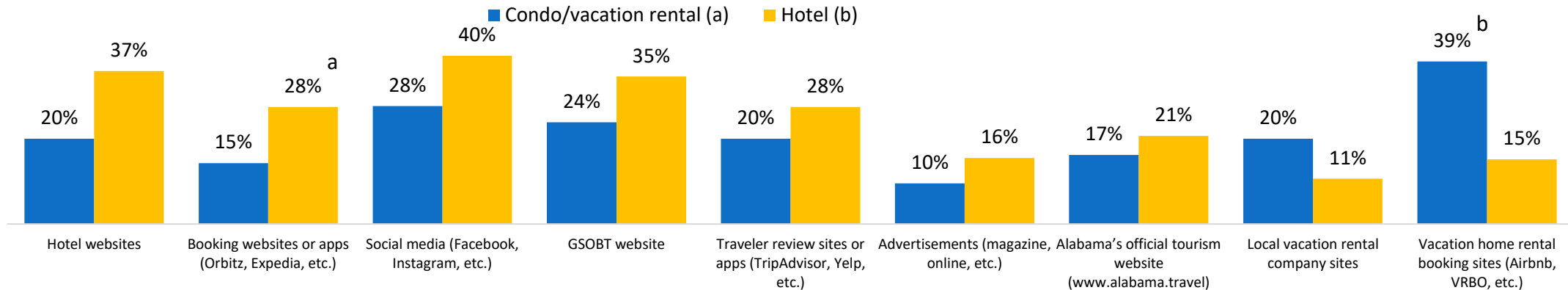


Travel Planning – Hotel vs. Condo Rental

- Hotel stayers continue to use the Welcome Centers at a higher rate, which is consistent with other seasons.
- Hotel stayers also rely on hotel and booking websites, the destination website, social media, ads, and traveler review sites more than condo stayers, who are more familiar with the destination. Newer visitors tend to research more before and during travel.



Trip planning resources with biggest difference by lodging type



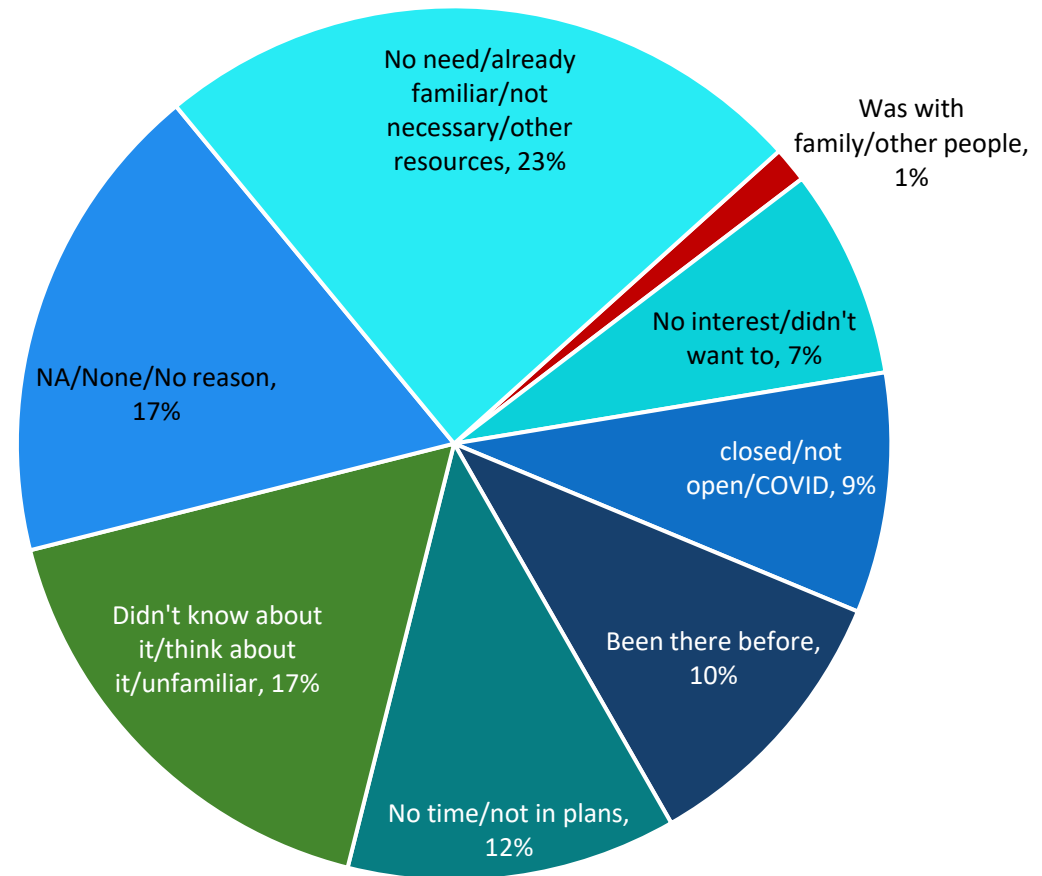
Vacation rental/condo n=103 (a); Hotel/motel n=304 (b); a / b indicate statistically significant differences at the 95% level.

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, 23% say it is because they are already familiar with the destination.
- A third either didn't know about it or had no reason to go.
- This merits messaging to tell visitors about the center.
- Because Welcome Center visitation is associated with more positive views of the destination and higher likelihood to return, there is value in incentivizing new visitors in particular to stop at the Welcome Centers. But there is also value in getting return visitors to stop at the Welcome Center.

Why didn't you visit the Welcome Center?

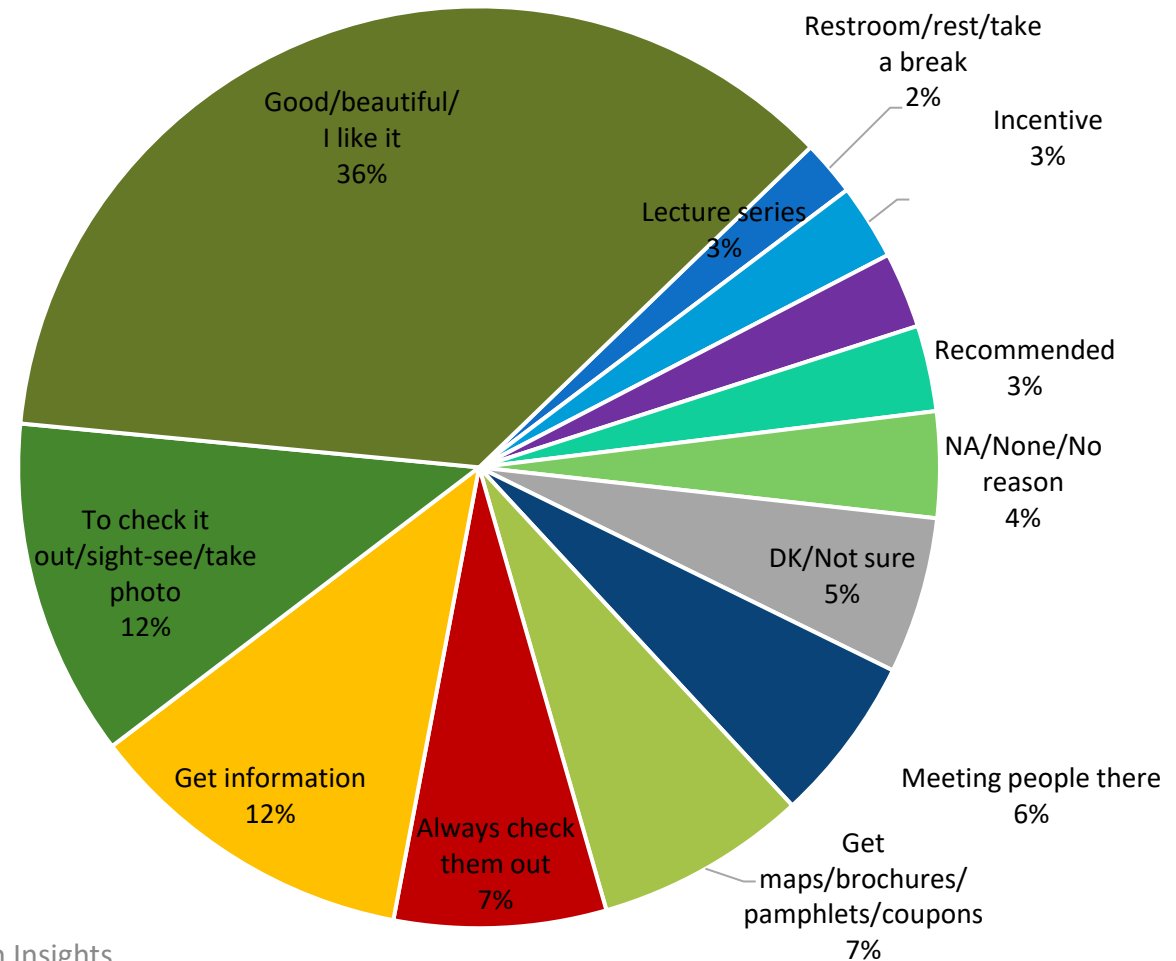


Question text: Why didn't you visit the Welcome Center? [open ended response]

Travel Planning – Welcome Center Visitors

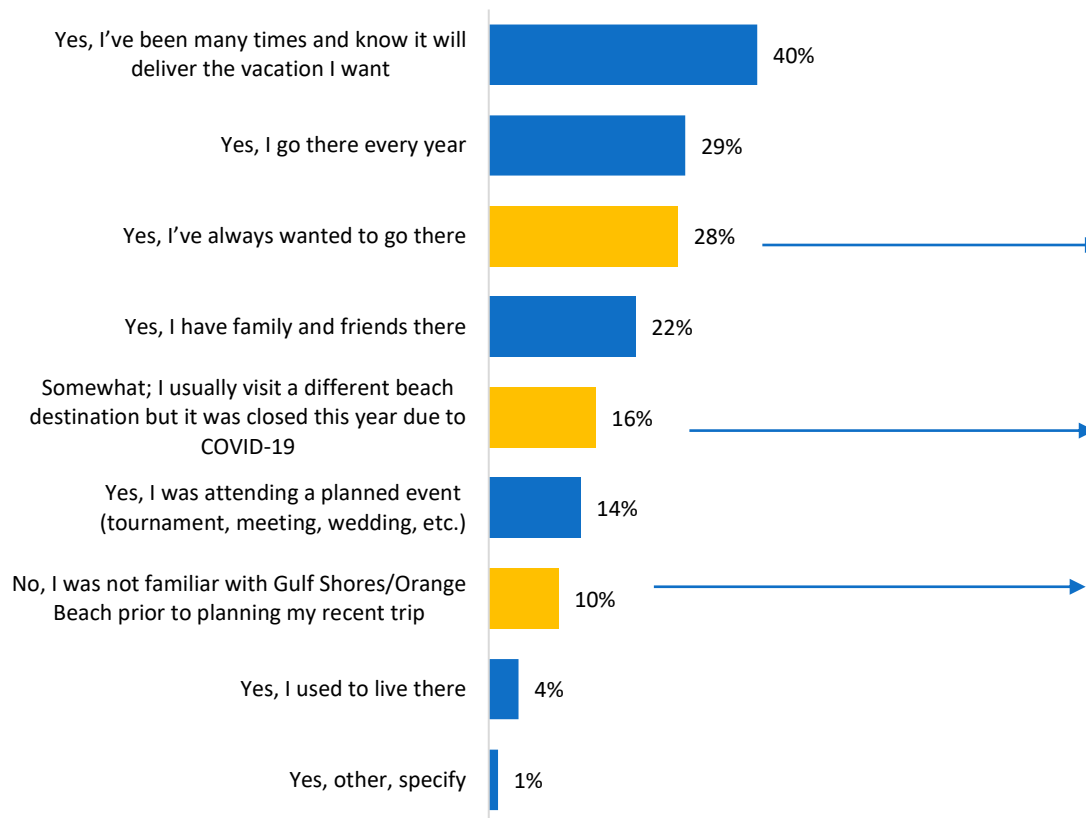
- Last winter, a third of winter visitors came to the Welcome Center to get information. This winter, only 18% did so.
- This winter there were many more and varied reasons to stop at the Welcome Center.

Why did you visit the Welcome Center?

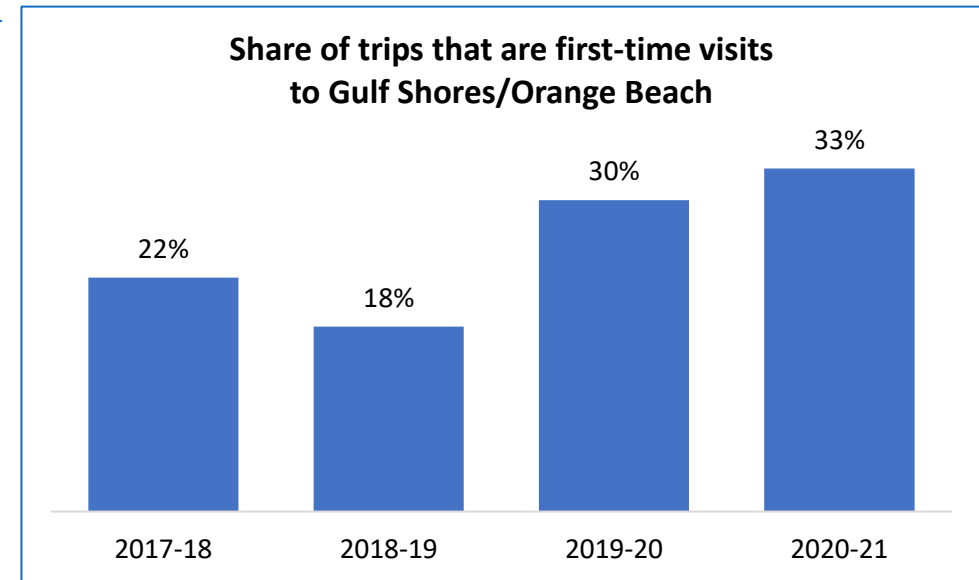


Trip Characteristics – First-Time Visitors

Prior to this visit, was Gulf Shores/ Orange Beach familiar to you? (2020-21)



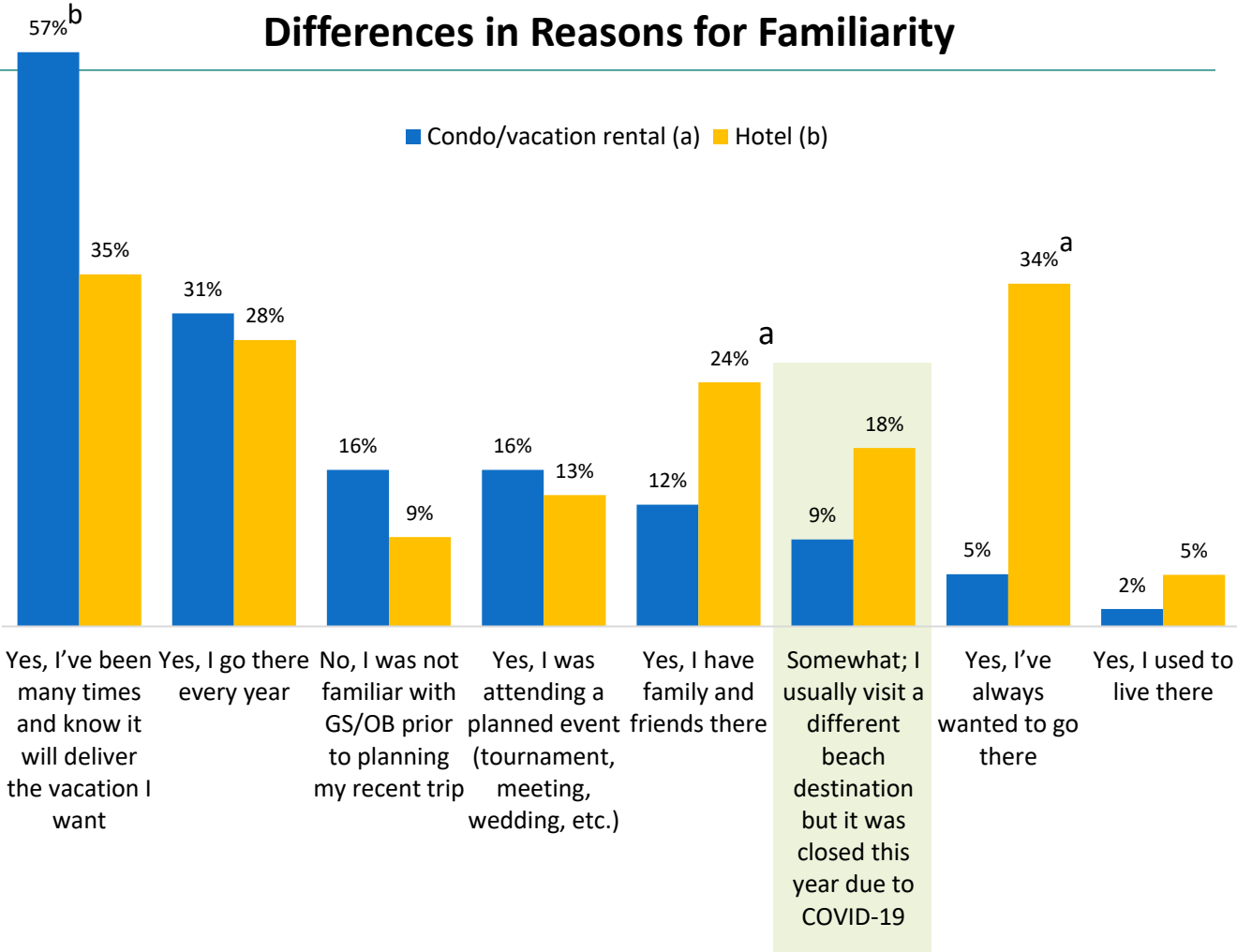
- A third of winter visitors were in GS/OB for the first time in 2020-21.
- 16% of visitors came to GS/OB after their usual destinations were closed due to COVID-19.



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

Vacation renters tend to be repeat visitors. Hotel stayers tend to be new visitors, and twice as likely to have come to GS/OB due to COVID closures elsewhere.

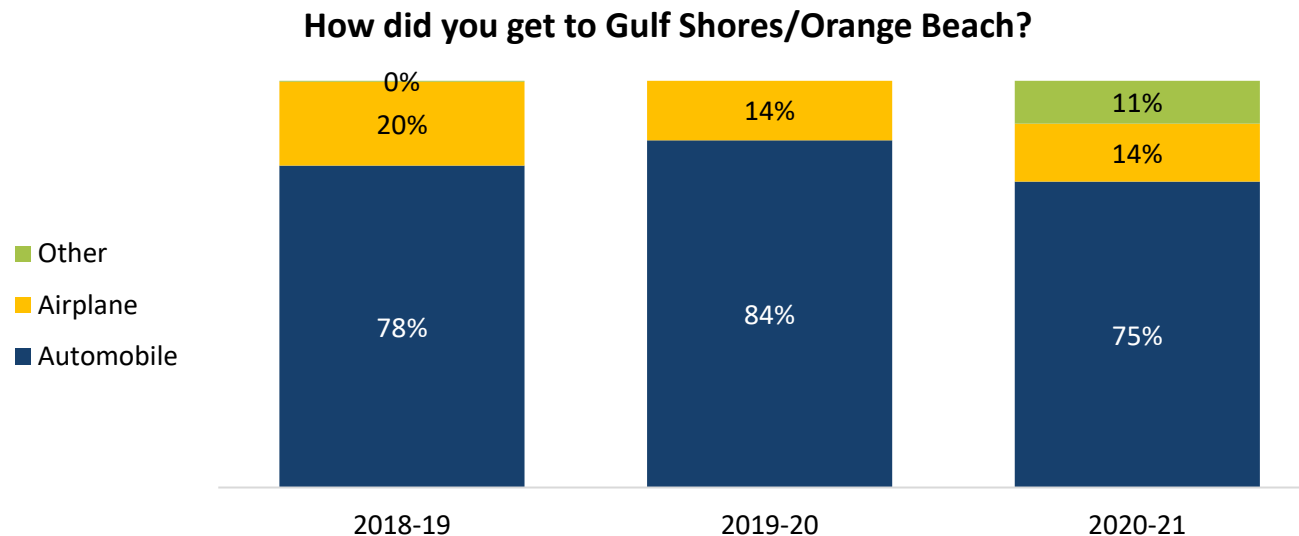
Differences in Reasons for Familiarity



Vacation rental/condo n=103 (a); Hotel/motel n=304 (b); a / b indicate statistically significant differences at the 95% level. Question text: Prior to your visit, was Gulf Shores/Orange Beach familiar to you? Response options as shown in graph above.

Trip Characteristics – Drive vs. Fly

- Most winter visitors drive to GS/OB; this winter more visitors arrived by alternate transportation such as RV and bus. These are mainly for second and third trips by one traveler or household, with personal vehicles remaining the main transportation for the main trip.
- Three-fourths of those who flew came from Miami and Atlanta. Most fly visitors (69%) arrived in Pensacola; 30% flew into Mobile.



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

– Activities

- Outdoor and socially distant activities were the most commonly engaged in this winter: the beach, shelling, Gulf State Park, and fishing saw increases. Mild winter weather contributed to this.
- As anecdotal evidence suggested, fewer winter visitors went to restaurants. There were also decreases in shopping.

Winter trip participation	2018-19	2019-20	2020-21
Beaches	66%	55%	52%
Dining out	61%	73%	48%
Relaxing	56%	58%	46%
Shopping	50%	50%	42%
The Wharf	27%	28%	28%
Sightseeing	41%	35%	28%
Shelling	21%	12%	25%
Gulf State Park	26%	15%	23%
Fishing	11%	13%	19%
Tanger Outlets	27%	28%	19%
Watching wildlife	17%	10%	19%
Swimming	30%	30%	19%
Dolphin tour	14%	22%	18%
Concerts and nightlife	13%	8%	18%
Photography	16%	17%	18%
Historical sites	15%	4%	17%
Visiting friends/relatives in the area	20%	12%	17%
Bicycle riding	13%	10%	17%
Dauphin Island	11%	6%	17%
Fort Morgan Historic Site	12%	5%	16%
Alabama Gulf Coast Zoo	14%	4%	16%
OWA Park	5%	12%	15%
Family/friends reunion	15%	3%	15%
Hiking on trails	19%	12%	13%
Visiting a spa	9%	7%	13%
Festivals/special events (non-sports)	12%	4%	13%

Cont'd.	2018-19	2019-20	2020-21
Bon Secour Nat'l Wildlife Refuge	10%	4%	12%
Boating or sailing	11%	5%	12%
Exercise/Working out	18%	9%	12%
Alabama's Coastal Connection Scenic Byway	15%	9%	12%
Coastal Birding Trail			11%
Tennis	3%	2%	11%
Golfing	9%	4%	10%
Parasailing/Jet skiing	4%	3%	10%
Birdwatching	6%	4%	10%
Adventure Island	13%	11%	9%
Bellingrath Gardens	3%	4%	9%
Civil War History Trail			8%
Hugh S. Branyon Backcountry Trail	3%	7%	8%
National Naval Aviation Museum	14%	2%	8%
Kayaking/Canoeing/Paddle boarding	11%	7%	6%
Waterville	5%	1%	6%
The Track	6%	4%	6%
Scuba diving/Snorkeling	6%	5%	3%
Battleship USS Alabama	12%	11%	2%
Sporting events	3%	8%	1%

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

Trip Characteristics

- Due to widespread closures of attractions and activities across destinations in 2020 and 2021, 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 we've seen in prior seasons, closures had a minor impact; 30% of winter visitors had no such issue. Of those who did, the most frequent were the dolphin tours, the National Naval Aviation Museum, and Waterville. Some of these closures may seasonal as well, rather than COVID-related.

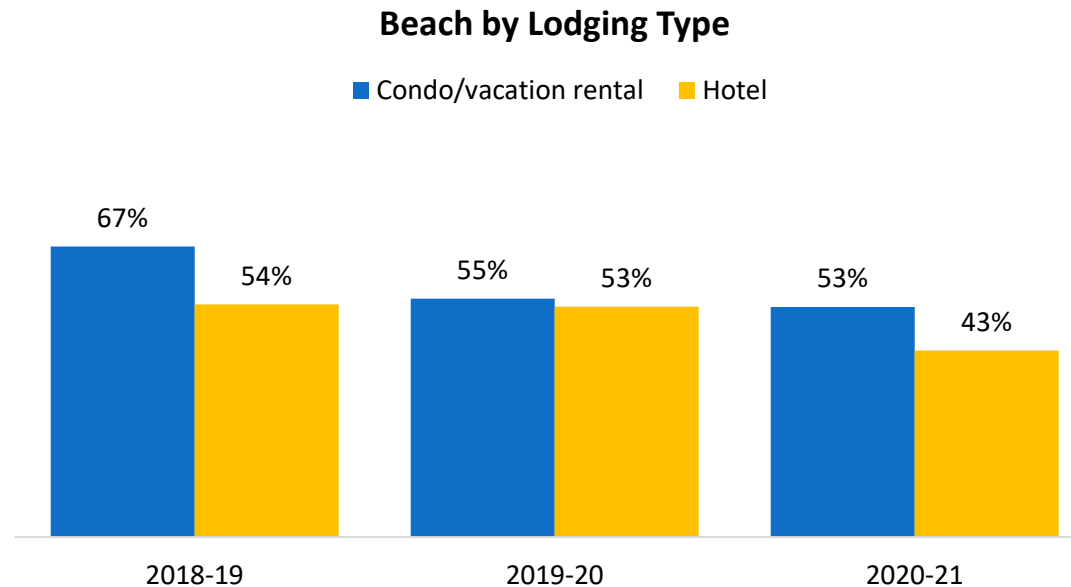
	Went to	Wanted to but was closed
None of these	4%	30%
Dolphin tour	18%	14%
National Naval Aviation Museum	8%	14%
Waterville	6%	12%
Sightseeing	28%	12%
Historical sites	17%	12%
Family/friends reunion	15%	12%
Festivals or special events (non-sports events)	13%	12%
Kayaking/Canoeing/Paddle boarding	10%	11%
Scuba diving/Snorkeling	9%	11%
Shelling	25%	11%
Dining out	48%	11%
Adventure Island	9%	11%
Parasailing/Jet skiing	10%	10%
Sporting events	10%	10%
Alabama's Coastal Connection Scenic Byway	12%	10%
Battleship USS Alabama	11%	10%
The Track	6%	10%
Tennis	11%	10%
Bellingrath Gardens	9%	10%
Bon Secour National Wildlife Refuge	12%	10%
Civil War History Trail	8%	10%
Coastal Birding Trail	11%	9%
OWA Park	15%	9%
Gulf State Park	23%	9%
Concerts and nightlife	18%	9%
Golfing	10%	9%
Visiting a spa	13%	9%

	Went to	Wanted to but was closed
Exercise/Working out	12%	8%
Watching wildlife	19%	8%
Hugh S. Branyon Backcountry Trail	8%	8%
Fort Morgan Historic Site	16%	8%
Alabama Gulf Coast Zoo	16%	8%
Shopping	42%	8%
Fishing	19%	8%
Tanger Outlets	19%	7%
Visiting friends/relatives who live in the area	17%	7%
Dauphin Island	17%	7%
Hiking on trails	13%	7%
Swimming	19%	6%
Beaches	52%	6%
The Wharf	28%	5%
Relaxing	46%	5%
Photography	18%	5%
Bicycle riding	17%	5%

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 – Beach Activities

- Beach participation, which is strongly impacted by weather, remained steady among condo stayers and dropped somewhat among hotel stayers.

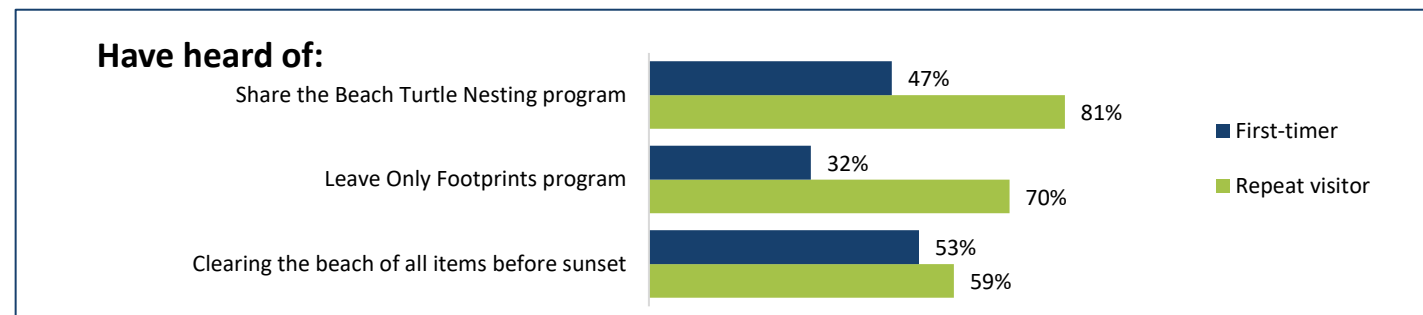


Question text: What attractions and activities did you visit or participate in while in Gulf Shores/Orange Beach on your trip? Response chosen: beach
Condo/vacation rental 2019-20 n=103 (a); Hotel/motel 2019-20 n=304 (b)
a / b indicate statistically significant differences at the 95% level.

Trip Characteristics – Beach Motivation

- Trip motivations were more spread out across experiences this year, with beaches and relaxation continuing to lead. There is growth in the share of winter trips motivated by wildlife watching and photography.
- Most repeat visitors were aware of the Share the Beach Turtle nesting program and Leave Only Footprints. Fewer than half of new visitors were aware of these initiatives. Just over half of all visitors were aware that all items were cleared from beaches each day before sunset.

Winter trip motivators	2018-19	2019-20	2020-21
Beaches	53%	47%	32%
Relaxing	38%	40%	26%
Dining out	18%	37%	20%
Shopping	18%	15%	15%
Sightseeing	18%	16%	13%
Photography	3%	2%	9%
Swimming	12%	11%	9%
Family/friends reunion	9%	2%	9%
Watching wildlife	4%	3%	8%
Visiting friends/relatives who live in the area	12%	11%	8%



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

Trip Characteristics – Spending

- Winter trip spending rebounded somewhat, driven by a large increase among hotel stayers, whose spending was notably higher across categories. Condo stayers' overall spending was more in line with last winter.

Average Travel Party Expenditures per Trip – WINTER	2018-19		2019-20		2020-21	
	Spending	% of total	Spending	% of total	Spending	% of total
Lodging	\$944	41%	\$1,032	58%	\$808	45%
Meals/food/ groceries	\$460	20%	\$334	19%	\$365	20%
Shopping	\$338	15%	\$199	11%	\$290	16%
Recreation or entertainment	\$243	11%	\$144	8%	\$177	10%
Transportation within Gulf Shores	\$271	12%	\$47	3%	\$107	6%
Other	\$53	2%	\$25	1%	\$64	4%
TOTAL	\$2,310		\$1,781		\$1,811	

2017-18 n=554; 2018-19 n=401; 2019-20 n=455; 2020-21 n=407

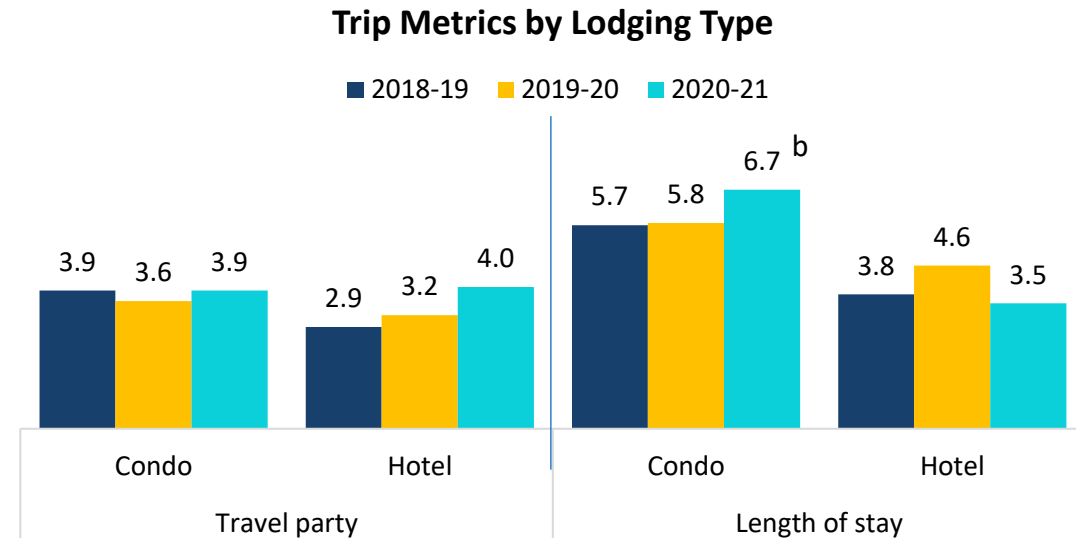
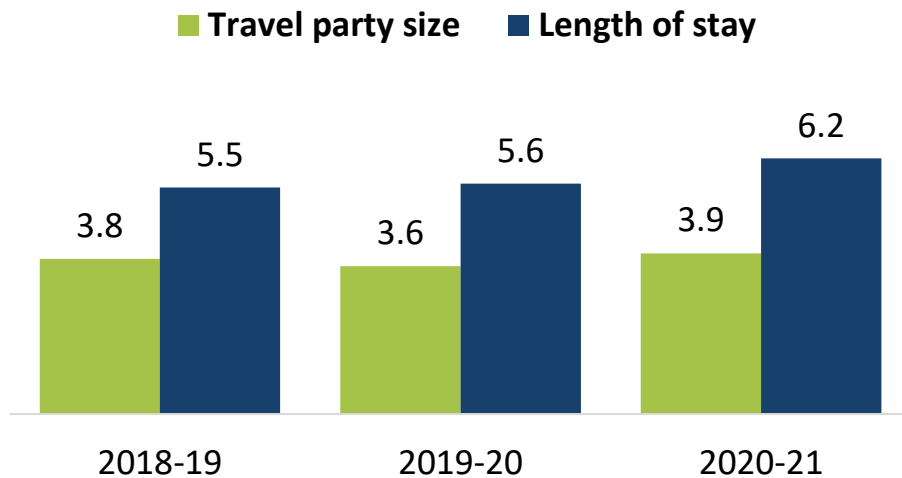
Average Travel Party Expenditures per Trip – WINTER	2018-19		2019-20		2020-21	
	Vacation rental	Hotel	Vacation rental	Hotel	Vacation rental (a)	Hotel (b)
Lodging	\$1,022	\$407	\$1,123	\$425	\$877 ^b	\$465
Meals/food/groceries	\$489	\$260	\$352	\$223	\$379	\$291 ^a
Shopping	\$349	\$257	\$199	\$202	\$271	\$386 ^a
Recreation or entertainment	\$250	\$189	\$145	\$133	\$165	\$235
Transportation within Gulf Shores	\$297	\$91	\$40	\$93	\$102	\$130
Other	\$50	\$74	\$25	\$27	\$53	\$123 ^a
TOTAL	\$2,458	\$1,278	\$1,882	\$1,103	\$1,847	\$1,631

Condo/vacation rental 2017-18 n=100; 2018-19 n=109; 2019-20 n=78; 2020-21 n=103
 Hotel/motel 2017-18 n=454; 2018-19 n=292; 2019-20 n=377; 2020-21 n=304

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

Travel Party Characteristics

- Travel party size grew somewhat, driven by larger hotel travel parties.
- Length of stay was up this winter, due to condo stayers remaining in market for nearly one extra day. Last winter's longer hotel stays returned to their normal average of just over three nights.

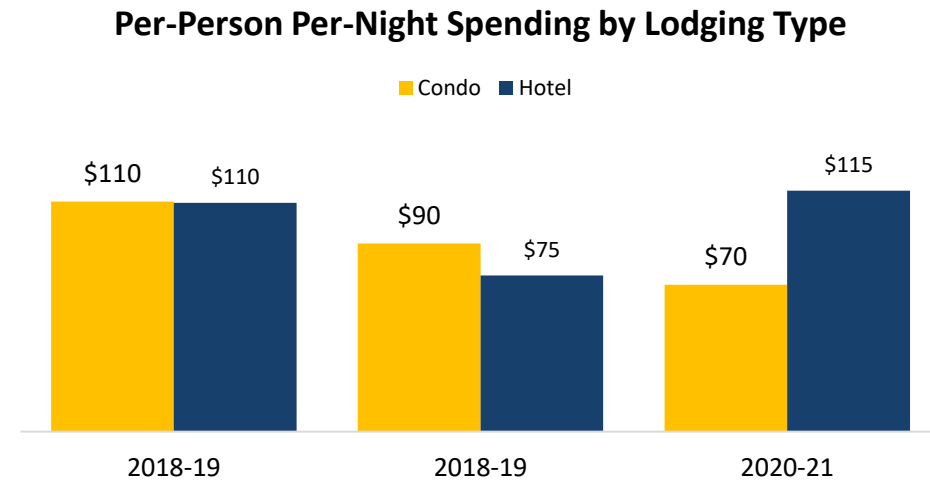
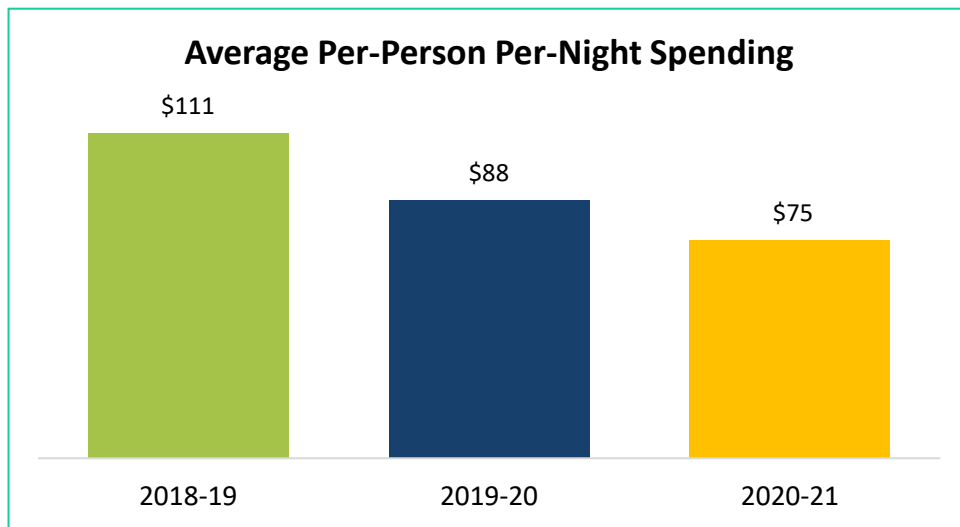


Question text: Including yourself, how many people were in your travel party? How many nights did you stay in Gulf Shores/Orange Beach during this trip? If you did not stay overnight, please enter '0'.
Open-ended numeric responses.

Condo/vacation rental 2017-18 n=100; 2018-19 n=109; 2019-20 n=78; 2020-21 n=103
Hotel/motel 2017-18 n=454; 2018-19 n=292; 2019-20 n=377; 2020-21 n=304

Travel Party Characteristics

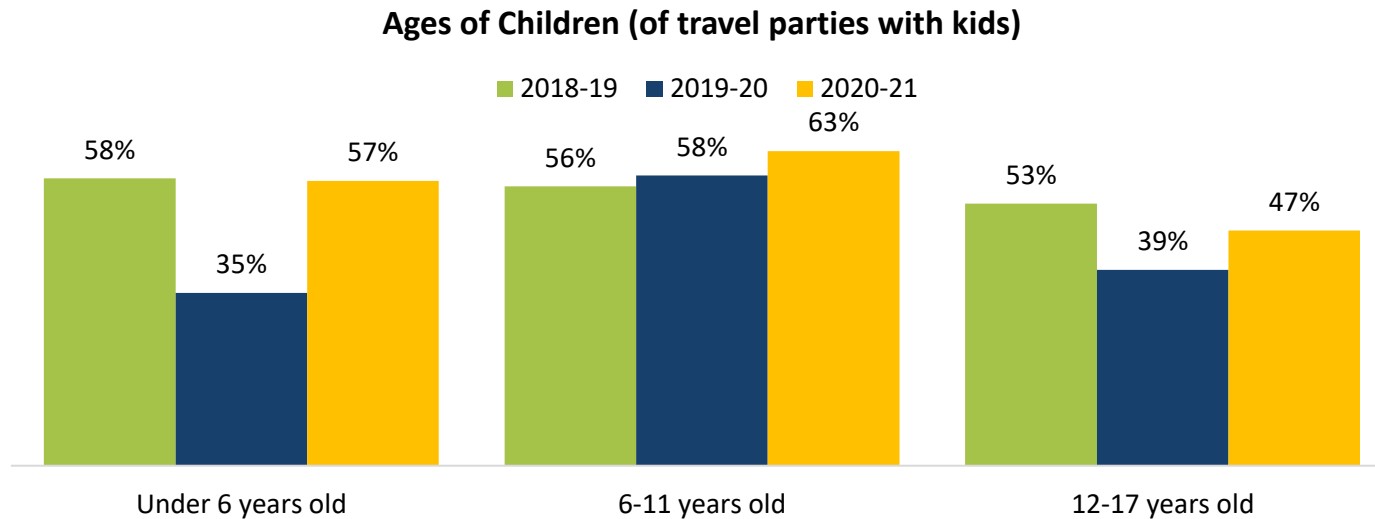
- Average per-person per-night spending continued to decline this winter. Longer condo stays with level overall visit spending brought this figure down for these visitors.
- Higher spending among hotel stayers, however, generated the highest per-person per-night spending among this visitor group to date.



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 2017-18 n=100; 2018-19 n=109; 2019-20 n=78; 2020-21 n=103
Hotel/motel 2017-18 n=454; 2018-19 n=292; 2019-20 n=377; 2020-21 n=304

Travel Party Characteristics

- More winter travel parties included kids this winter. With many schools around the country being held virtually due to the pandemic, families had more flexibility to travel.



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

Travel Party Characteristics

- Average visitor household income continues to increase.
- This year’s winter visitors are slightly older.

Year-over-Year Demographic Profile Winter visitors		2018-19	2019-20	2020-21
Age	Average	44	42	43
Marital status	Married	73%	76%	79%
	Divorced/Separated	6%	6%	8%
	Single/Never married	20%	17%	11%
	Widowed	1%	1%	2%
HH income	Average	\$132,941	\$137,357	\$150,893

2017 n=383; 2018 n=397; 2019 n=437; 2020 n=407

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)

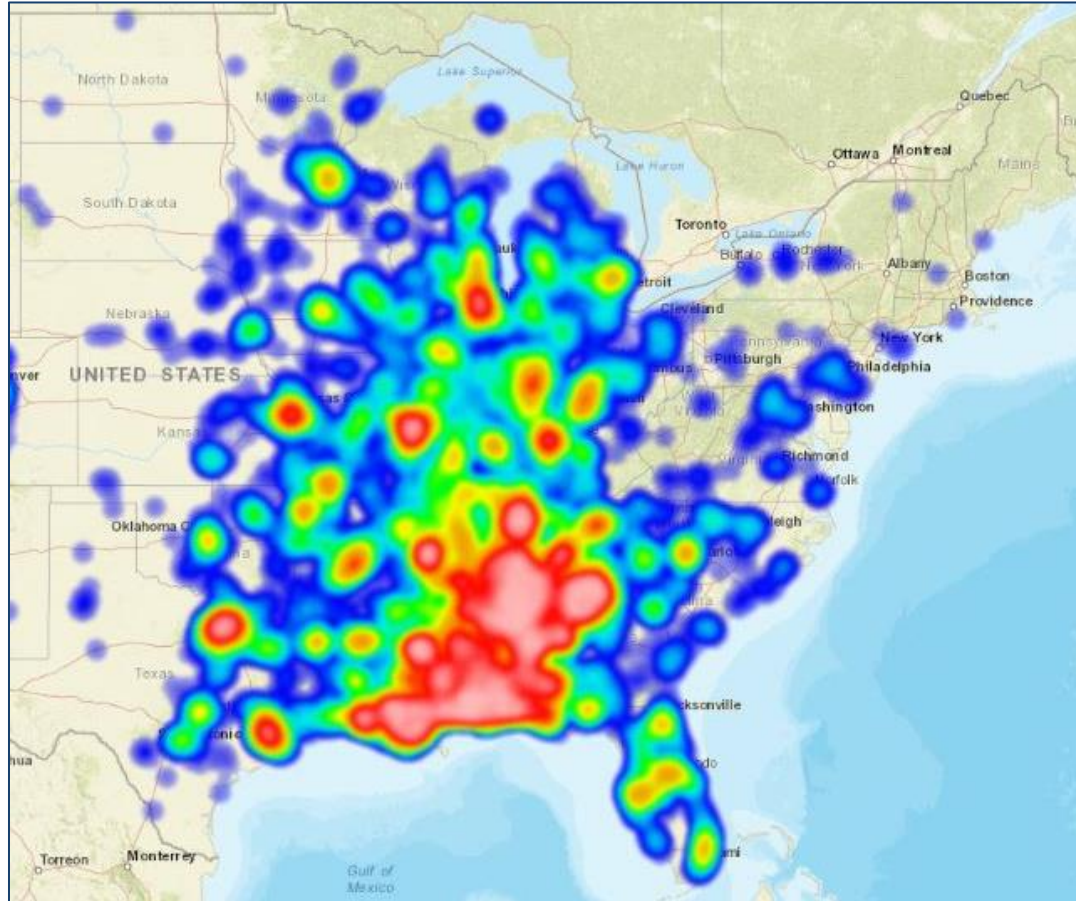
Travel Party Characteristics

- Higher incomes among hotel stayers are bringing up the overall visitor average. These visitors are younger, more married, more affluent, more ethnically diverse, and better educated.
- A higher share of condo stayers were retirees this winter, which is consistent with lower incomes year-to-year.

Winter demographic profile by lodging type		2018-19		2019-20		2020-21	
		Vacation rental/condo	Hotel	Vacation rental/condo	Hotel	Vacation rental/condo (a)	Hotel (b)
Age	Average	45	42	47	40	51 ^b	41
Marital status	Married	73%	70%	73%	76%	69%	82%
	Divorced/Separated	6%	8%	8%	5%	9%	8%
	Single/Never married	1%	2%	0%	1%	9%	0%
	Widowed	19%	20%	18%	17%	14%	10%
HH income	Average	\$127,950	\$133,320	\$141,950	\$136,143	\$135,170	\$154,988
Education	College grad+	68%	67%	65%	69%	59%	78% ^a
Occupation	Executive/upper management	17%	24%	8%	25%	10%	32% ^a
	IT professional	10%	18%	8%	22%	16%	26%
	Educator	13%	6%	15%	6%	5%	3%
	Homemaker	11%	10%	7%	7%	3%	3%
	Student	2%	2%	0%	2%	0%	0%
	Small business owner	6%	4%	12%	4%	5%	5%
	Skilled trade/service	6%	12%	8%	7%	12%	7%
	Other	11%	14%	25%	15%	17%	15%
	Retired	18%	12%	10%	8%	26% ^b	7%
	Not currently employed	2%	0%	7%	4%	5%	3%
Ethnicity	Caucasian/White	89%	77%	87%	83%	90%	84%
	African-American/Black	2%	8%	10%	8%	10%	9%
	Latino/Hispanic	7%	12%	2%	10%	2%	6%
	Asian	8%	8%	3%	5%	2%	3%
	American Indian	0%	0%	0%	2%	0%	1%
	Other	0%	0%	0%	0%	0%	1%

Travel Party Characteristics

- Heat map showing source markets of winter visitors

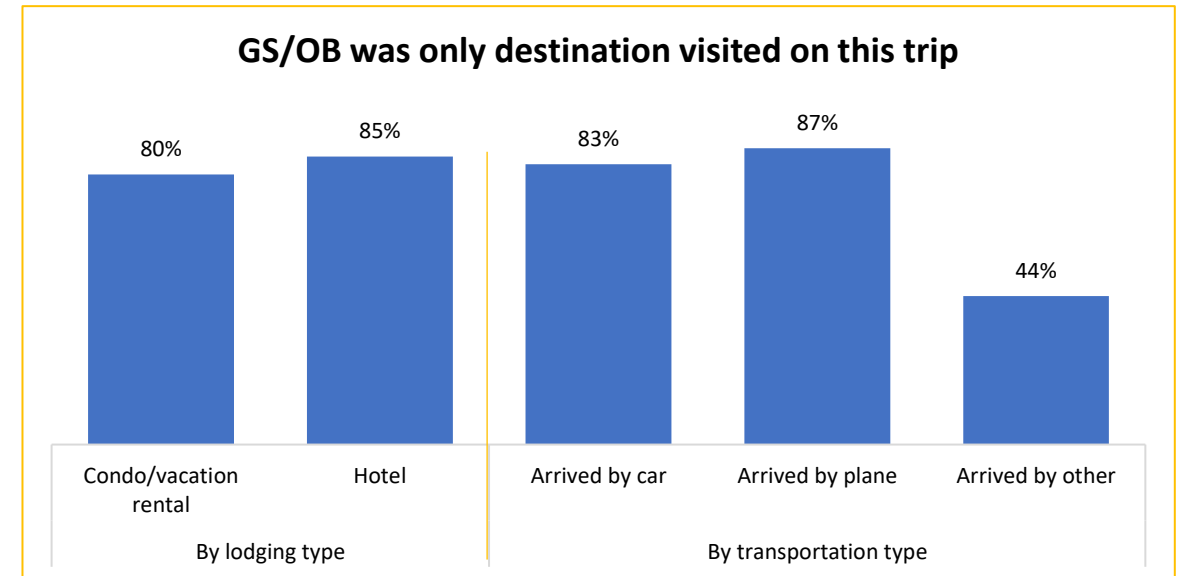
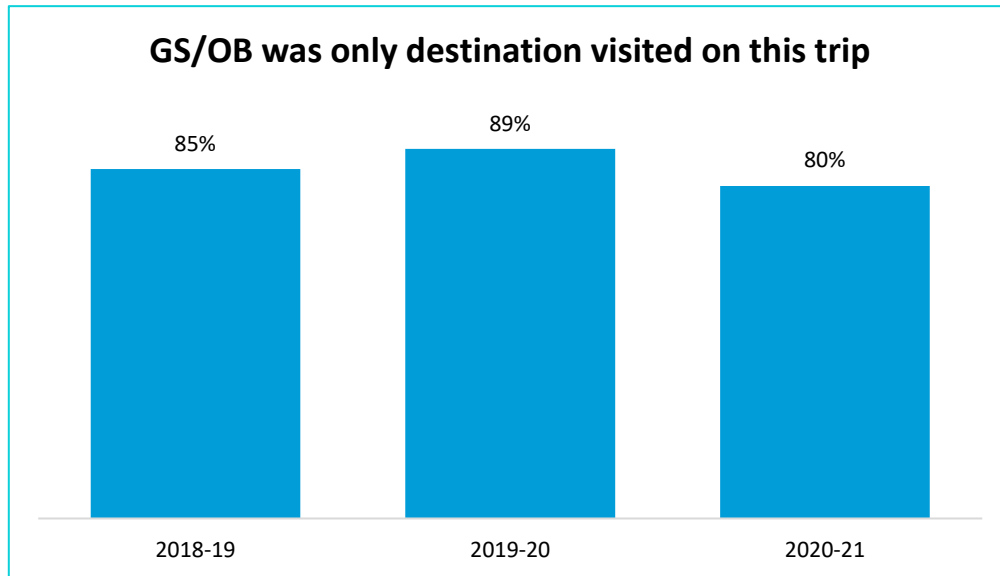


Winter 2020-21	
Alabama	25%
Mississippi	11%
Louisiana	7%
Georgia	7%
Tennessee	7%
Florida	6%
Texas	5%
Illinois	5%
Missouri	4%
Indiana	3%
Arkansas	3%
Kentucky	2%
Michigan	2%
Ohio	2%
Wisconsin	2%
Iowa	2%

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

Destinations Visited

- Most winter visitors only come to GS/OB, rather than stopping for the day during a longer road trip. Even those who fly to the area are mainly visiting GS/OB, and not a host of other places. Those arriving by alternate transportation are the exception.



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

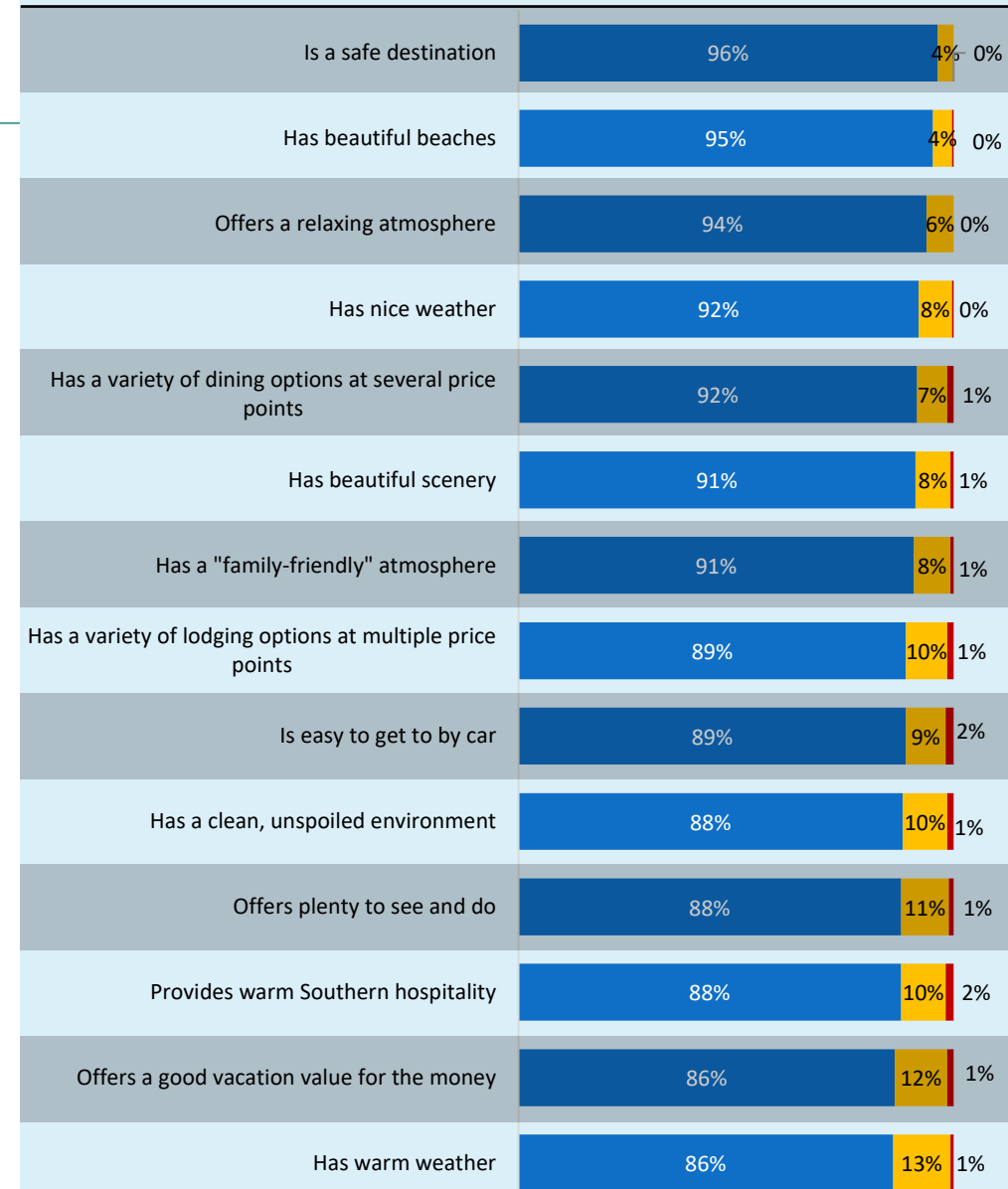
Views Toward GS/OB & Trip Satisfaction

- Ratings of GS/OB by winter visitors remain overwhelmingly positive.
- This year for the first time, safety is the highest-rated image attribute, outperforming beaches, weather, and atmosphere. Safety relative to the pandemic is no doubt top-of-mind for many travelers, especially older visitors, and this high rating during this phase of the pandemic is a positive result. The community's policies and practices are highly rated by winter visitors.

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

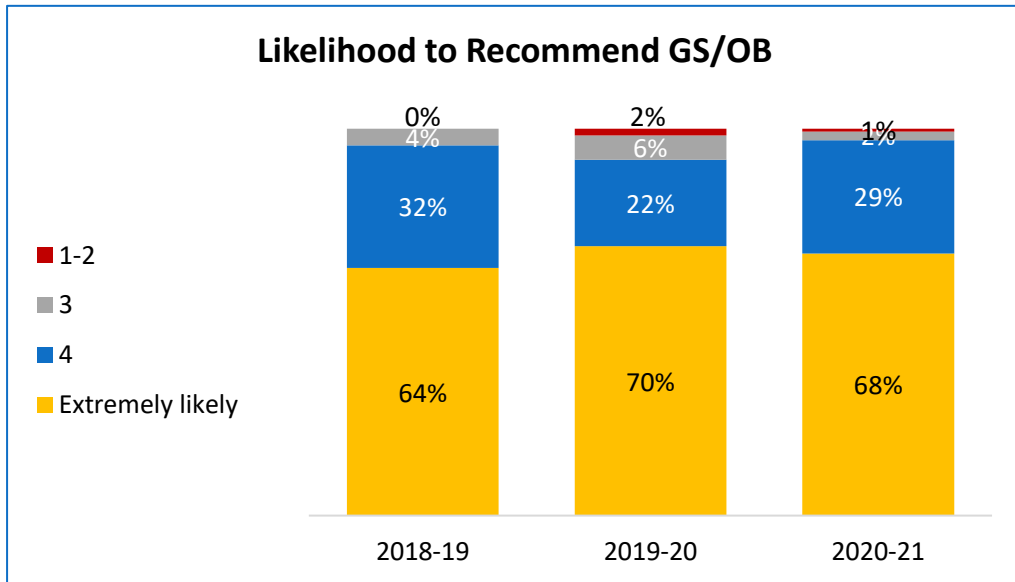
Views Toward Gulf Shores/Orange Beach

■ Top 2 box ■ Neutral ■ Bottom 2 box



Views Toward GS/OB & Trip Satisfaction

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



How likely are you to recommend Gulf Shores/Orange Beach to your friends or family as a destination to visit for a leisure trip? Winter visitors	2018-19 Top 2 Box %	2019-20 Top 2 Box %	2020-21 Top 2 Box %
Vacation rental/condo	96%	88%	93%
Hotel	94%	93%	98%

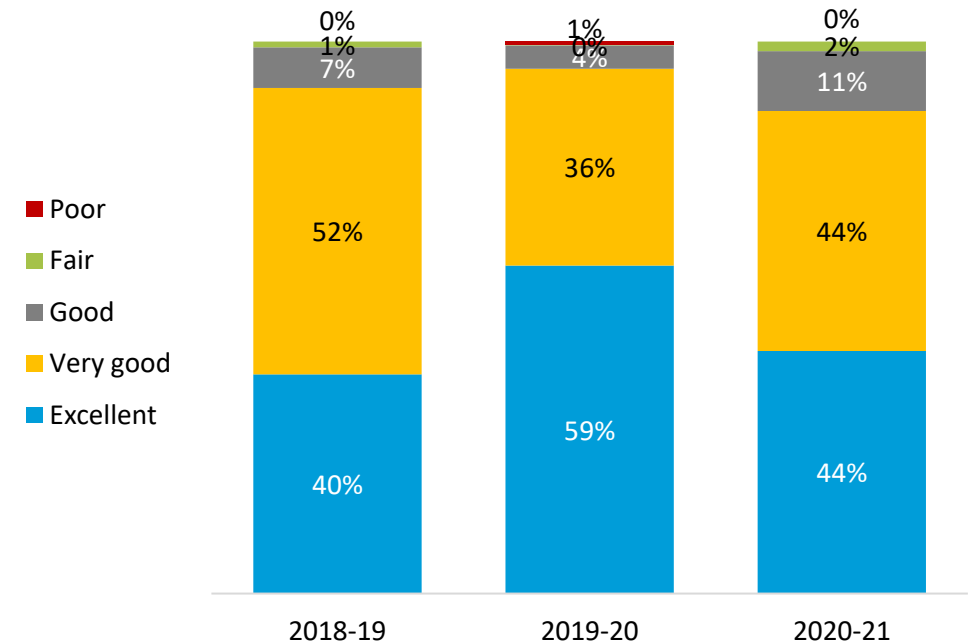
Condo/vacation rental 2017-18 n=100; 2018-19 n=109; 2019-20 n=78; 2020-21 n=103(a)
Hotel/motel 2017-18 n=454; 2018-19 n=292; 2019-20 n=377; 2020-21 n= 304(b)

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.
- Ratings shifted downward from “excellent” to “very good” and “good” ratings.
- There is minimal negative feedback (poor or fair ratings).
- Comments from those rating the experience “good” or “fair” include:
 - The impact of the Corona virus has changed the way everything is done and it’s just not as enjoyable.
 - Lots of places were short staffed and people just wanted to get us in and out of shops/restaurants.
 - Not as much help and therefore was slow.
 - I gave it a good rating because it was a fun trip but a lot of shops and stores were closed that we wanted to go to but couldn't. Also a lot of other touring spots were closed.
 - I felt unsafe in places where they did not wear masks.

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



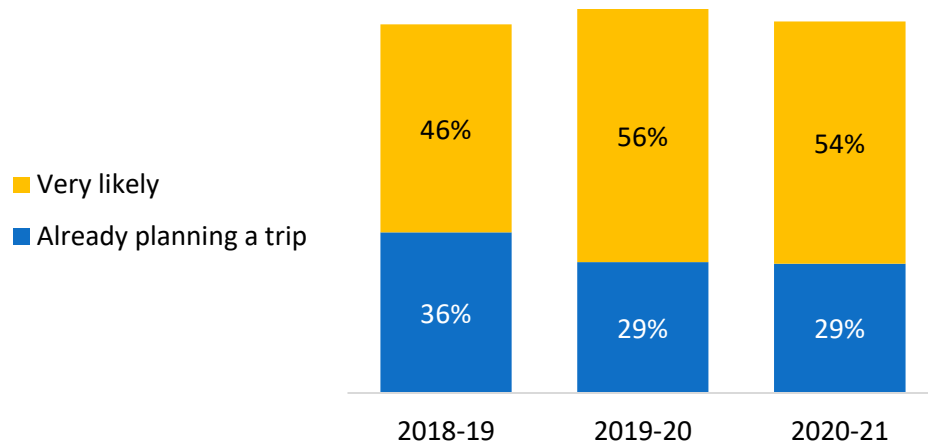
Question text: Overall, how would you rate the quality of the service you received at stores, restaurants, attractions, and lodging establishments in Gulf Shores/Orange Beach? Response options: Poor, fair, good, very good, excellent

Views Toward GS/OB & Trip Satisfaction

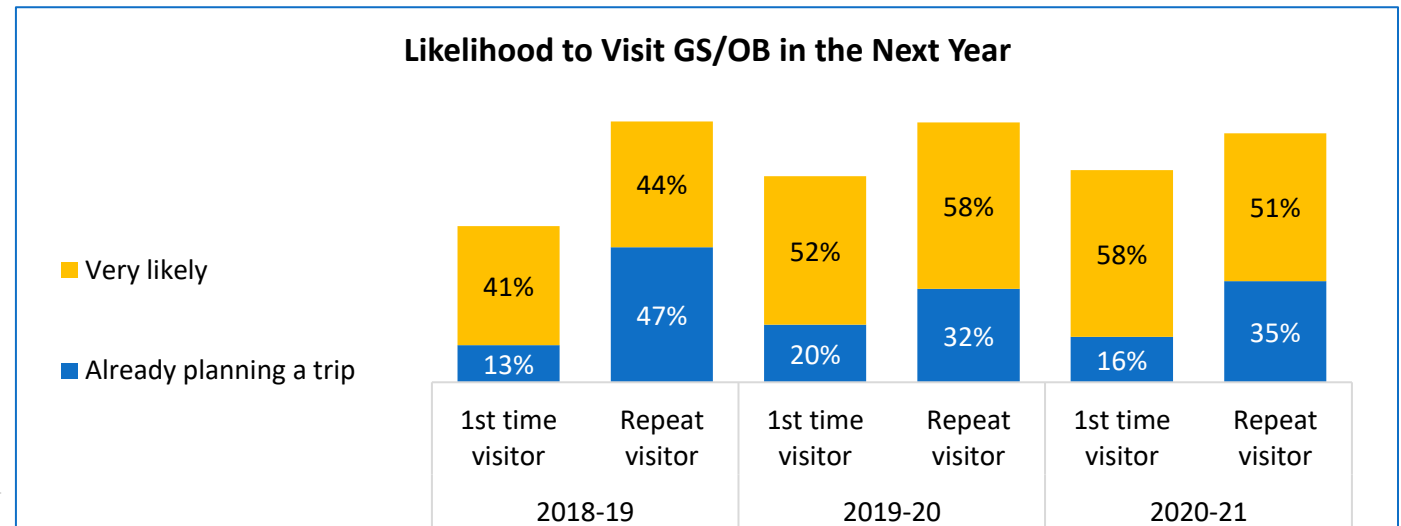
- Likelihood to return to GS/OB is in line with last winter. Since last winter there is growth in those saying they are “very likely” to return.
- New visitors are about as likely as last winter’s new visitors to be already planning a return trip. As in winter 2019-20, a third of repeat visitors are already planning a return; half are very likely to visit again.

Of those already planning a return trip to GS/OB:	
I go there every year	49%
I’ve been many times and know it will deliver the vacation I want	48%
I’ve always wanted to go there	26%
I was attending a planned event	17%

Likely to Return to GS/OB in the Next Year



Likelihood to Visit GS/OB in the Next Year



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

Likelihood to Return

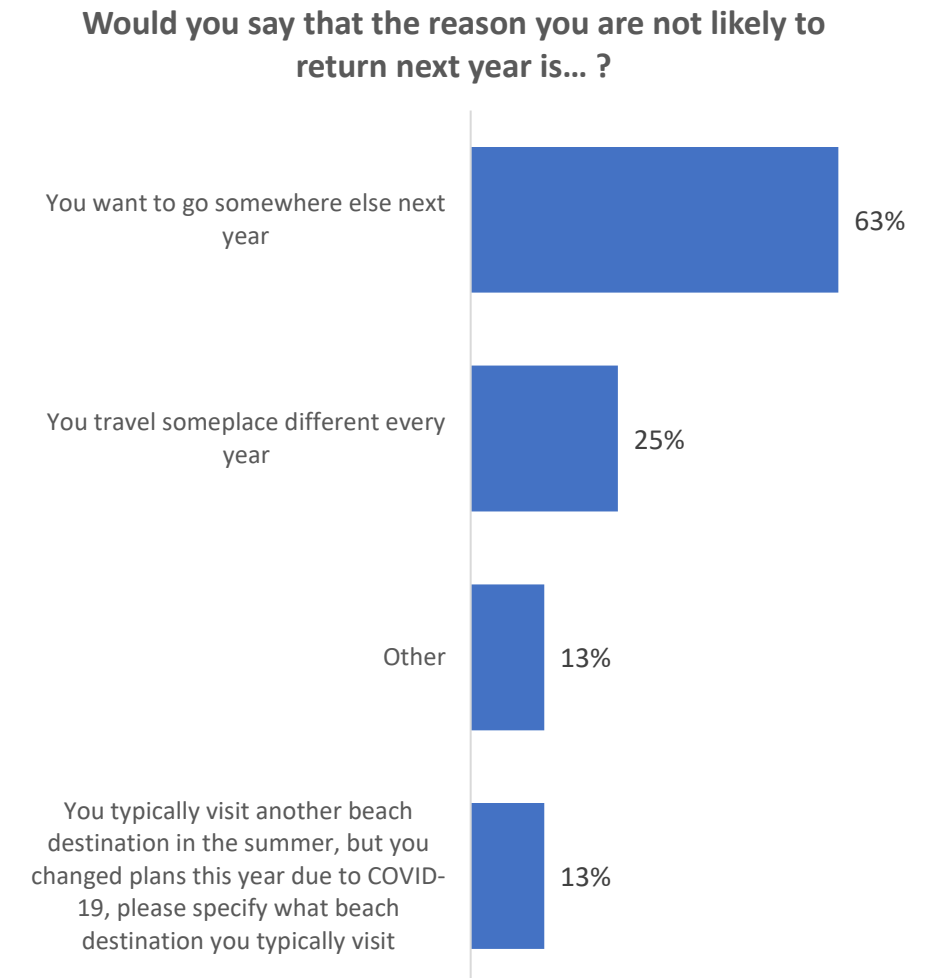
- In this wave of data collection, additional follow-up questions were asked of those winter visitors who report they are unlikely to return to GS/OB. The initial follow-up was an opportunity to answer, in open-ended fashion, why they are not likely to visit again in the coming year. Their responses include:
 - We go different places each season. Probably be 3-5 years before we return.
 - The beach areas are still very high risk of covid.
 - Rained most of January and was cold.
 - If I'm going to a beach it would have to be somewhere else like Florida or California.
 - I prefer Dauphin Island
 - I live across the bay on Dauphin Island no need to go to gulf shores
 - Heading to New York for this year's vacation
 - Bored with it

Question text: You mentioned that you are not likely to visit Gulf Shores/Orange Beach again in the next year. In just a few words, please tell us why.

Likelihood to Return

- Those who said they were not at all likely or not very likely to visit again were asked why, with a coded list of options. 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 winter visitors said that a negative experience was the reason for not returning.
- Panama City Beach 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.

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





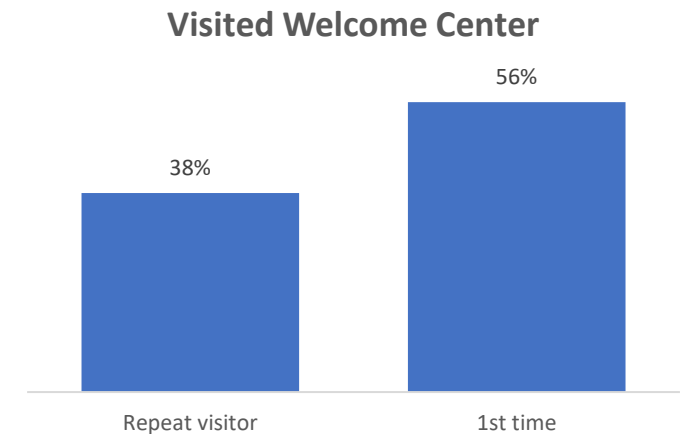
Welcome Center Supplemental Analysis

Visitor Profile Research – Winter 2020-21

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?
- Among winter visitors, Welcome Center visitors have longer stays. We would suggest that those who stay in the area longer have more opportunity to be exposed to the Welcome Center. This is a more likely explanation than that the Center influences longer stays, since length of stay is typically decided ahead of time.
- However, Welcome Center visitors participated in more activities. This makes sense, given that activities and attractions are promoted at the centers.
- As we typically see, more first-time than repeat visitors stopped at a Welcome Center, which makes sense among a population that is less familiar with the destination and is looking for ideas of things to do.

Winter 2019-20 visits	No Welcome Center (a)	Visited Welcome Center (b)
Length of stay	4.5	7.2 ^a
# of activities on trip	4.7	9.9 ^a



Impact on Spending

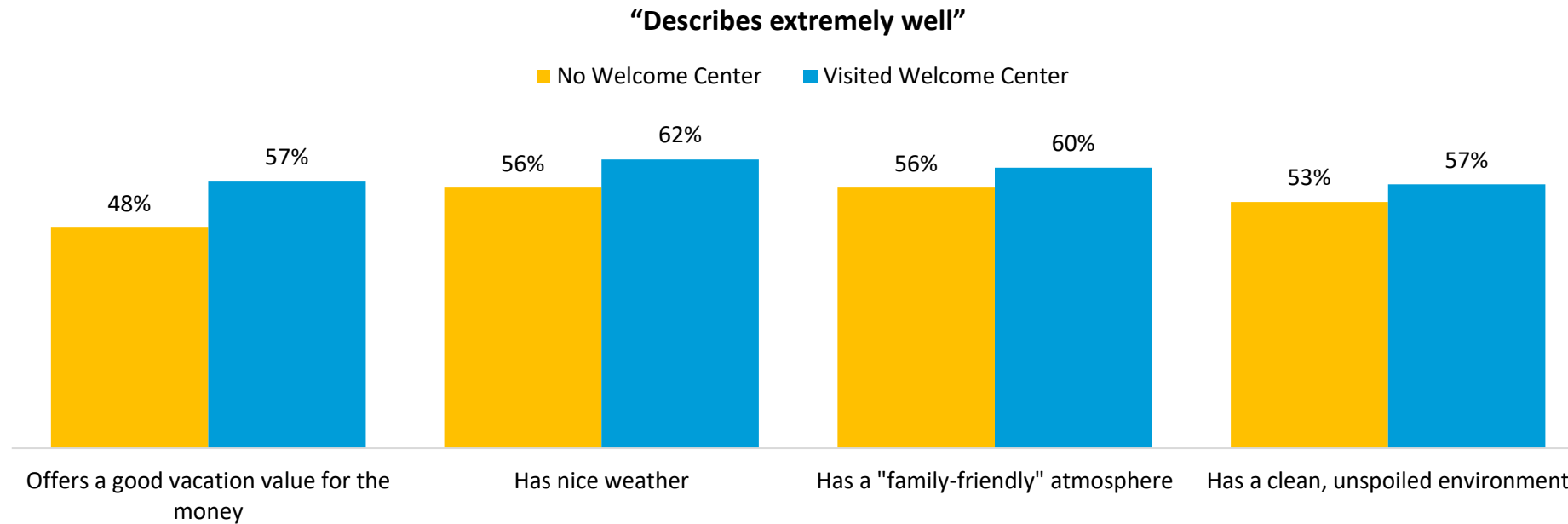
- Welcome Center visitors spent 18% more money in the destination on winter trips, particularly on shopping and recreation.
- While lodging decisions and length of stay are typically decided ahead of time, outings, shopping, and entertainment are often not pre-planned when visiting a place for leisure. So the Welcome Centers have more opportunity to impact these metrics.

Winter Trip Spending	No Welcome Center	Visited Welcome Center
Lodging	\$940 ^b	\$664
Meals/food/groceries	\$272	\$343 ^a
Shopping	\$180	\$363 ^a
Recreation or entertainment	\$100	\$225 ^a
Transportation within Gulf Shores	\$40	\$165 ^a
Other	\$44	\$98 ^a
Total	\$1,575	\$1,858

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.

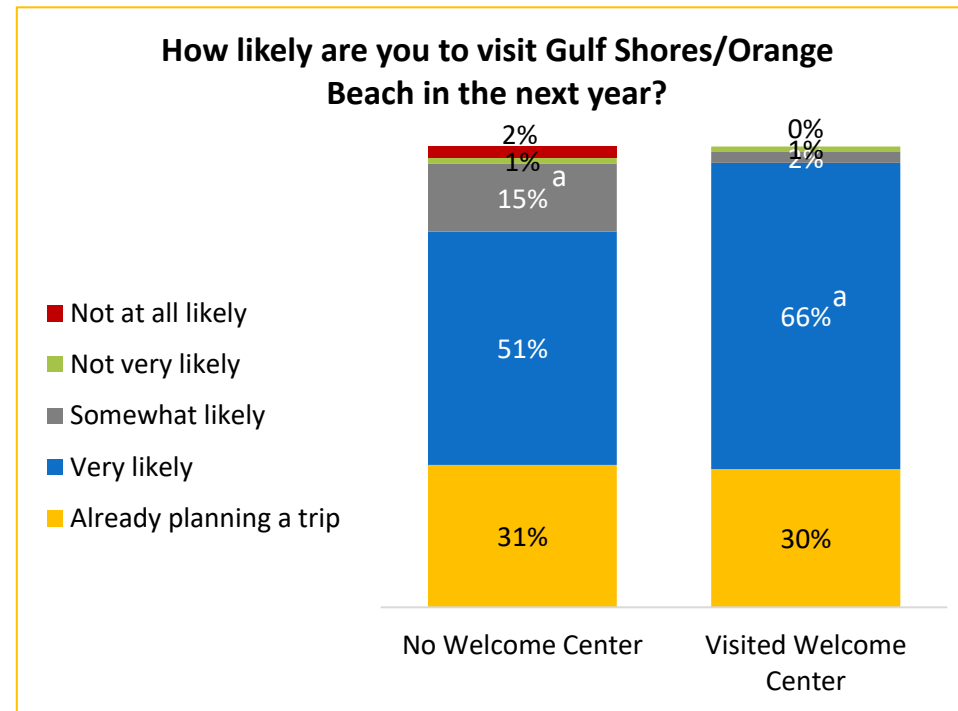
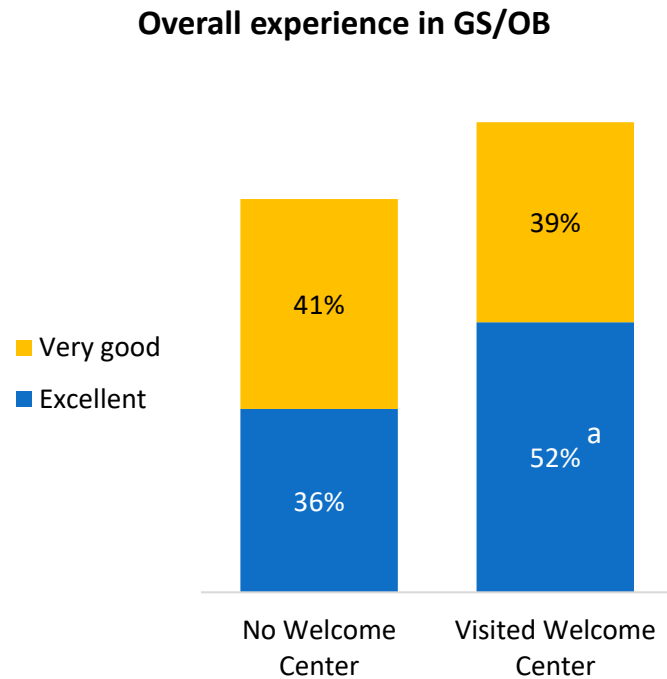
Impact on Image

- Welcome Center visitors have higher agreement with statements describing GS/OB's value, weather, family friendliness, and clean, unspoiled environment.



Impact on Experience and Intent to Return

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





Appendix

Visitor Profile Research – Winter 2020-21

Comparing Target to Other Travelers

- 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.
- In prior data collection, the non-target quota was divided into three cells: day trips, trips where visitors stayed overnight in non-paid lodging, and trips where visitors stayed more than 30 days. Not only were there sampling challenges finding 30+ day stayers, but also dividing a sample of just 100 into three groups meant fairly low accuracy in any of the three non-target groups. Therefore, the non-target quota includes day trips only.

Non-target WINTER Day trips	2017-18	2018-19	2019-20	2020-21
Average # visits/year	3.8	3.6	4.6	4.0
First-time trips	41%	50%	29%	34%

2017-18 day trip n=231; 2018-19 day trip n=6; 2019-20 day trip = 125; 2020-21 day trip=142

Comparing Target to Other Travelers

Began planning winter trip	2017-18		2018-19		2019-20		2020-21	
	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	10%	29%	6%	33%	8%	72%	12%	54% ^a
1-2 weeks	16%	16%	10%	17%	5%	6%	20%	29% ^a
3 weeks - 1 month	28%	19%	22%	17%	13%	15%	26% ^b	8%
2 - 3 months	24%	19%	35%	17%	40%	6%	18% ^b	7%
4-6 months	7%	7%	17%	0%	14%	0%	9% ^b	1%
6+ months	15%	10%	10%	17%	21%	0%	14% ^b	1%

GS/OB is only destination visited on this trip	2017-18		2018-19		2019-20		2020-21	
	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)
	82%	82%	84%	67%	89%	98%	80%	77%

2017-18 target n=554, day trip n=231; 2018-19 target n=401, day trip n=6; 2019-20 target n=438, day trip n=125; 2020-21 target n= 407 (a); day trip n=142 (b)
a / b indicate statistically significant differences at the 95% level.

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

Comparing Target to Other Travelers

Resources used to plan GS/OB trip	2017-18		2018-19		2019-20		2020-21	
	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)
Social media (Facebook, Instagram, etc.)	15%	13%	22%	17%	26%	7%	30%	27%
Gulf Shores & Orange Beach Tourism website	13%	8%	21%	17%	30%	7%	26%	26%
Family or friends	30%	32%	31%	50%	34%	56%	28%	23%
Traveler review sites or apps	11%	9%	23%	17%	22%	6%	22% ^b	14%
Travel/visitor guide	13%	10%	15%	0%	7%	1%	13%	13%
Booking websites or apps	20%	14%	20%	17%	23%	1%	17%	12%
Hotel websites	20%	19%	18%	0%	14%	0%	23% ^b	11%
Advertisements (magazine, online, etc.)	10%	9%	5%	0%	2%	1%	11%	10%
Alabama's official tourism website	10%	4%	10%	0%	4%	5%	17% ^b	8%
Magazine and newspaper articles	6%	6%	3%	0%	2%	1%	16% ^b	8%
Travel blogs	8%	7%	13%	17%	6%	1%	14%	8%
Vacation home rental booking sites	39%	6%	43%	0%	50%	0%	35% ^b	8%
Travel advice websites or apps	15%	10%	13%	17%	14%	1%	27%	7%
Local vacation rental company sites	14%	6%	13%	0%	21%	0%	19% ^b	4%

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

2017-18 target n=554, day trip n=231; 2018-19 target n=401, day trip n=6; 2019-20 target n= 438, day trip n=125; 2020-21 target n= 407 (a); day trip n=142 (b) a / b indicate statistically significant differences at the 95% level.

Comparing Target to Other Travelers

Children on trip	2017-18		2018-19		2019-20		2020-21	
	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	16%	5%	41%	0%	45%	13%	46%	42%
Of trips with children:	2017-18 target n=13, day trip n=2; 2018-19 target n=143, day trip n=4; 2019-20 target n=197, day trip n=16; 2020-21 target n=225, day trip n=59							
< 6 years old	29%	70%	58%	0%	37%	17%	26%	27%
6-11 years old	45%	40%	56%	0%	55%	83%	29%	28%
12-17 years old	57%	20%	53%	0%	43%	9%	22%	20%

Question text: Who traveled with you on this trip? Select all that apply. Response options: Spouse/Partner, Adult friends/relatives, Children under 18 [shown], Sports team, Business associates, Other, specify.

Question text: [IF CHILDREN UNDER 18 SELECTED] What ages were the children in your travel party? Response options as shown in table.

Mode of travel to GS/OB	2017-18		2018-19		2019-20		2020-21	
	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	75%	71%	77%	83%	84%	98%	75%	80%
Bus	3%	6%	0%	0%	1%	2%	10% ^b	4%
Airplane	20%	21%	20%	0%	14%	0%	14%	15%
Other*	2%	2%	2%	17%	0%	0%	0%	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.

2017-18 target n=554, day trip n=231; 2018-19 target n=401, day trip n=6; 2019-20 target n= 438, day trip n=125; 2020-21 target n=407 (a); day trip n=142 (b) a / b indicate statistically significant differences at the 95% level.

* Includes boat

Comparing Target to Other Travelers

	2017-18		2018-19		2019-20		2020-21	
	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	3.8	2.9	3.8	1.8	3.7	3.6	3.9 ^b	2.8

Trip spending	2017-18		2018-19		2019-20		2020-21	
	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	\$890	-	\$944	-	\$1,022	-	\$903	
Meals/food/groceries	\$389	\$174	\$460	\$119	\$362	\$64	\$365 ^b	\$121
Shopping	\$280	\$170	\$338	\$113	\$279	\$71	\$293 ^b	\$162
Recreation or entertainment	\$261	\$124	\$243	\$14	\$157	\$41	\$178 ^b	\$82
Transportation within Gulf Shores	\$94	\$74	\$271	\$17	\$63	\$27	\$106 ^b	\$51
Other	\$58	\$9	\$53	\$4	\$39	\$6	\$64	\$72
TOTAL	\$1,972	\$636	\$2,301	\$266	\$1,921	\$209	\$1,910	\$488
Per-person spending	\$426	\$214	\$505	\$148	\$517	\$58	\$489	\$175

2017-18 target n=554, day trip n=231;
 2018-19 target n=401, day trip n=6;
 2019-20 target n= 438, day trip n=125;
 2020-21 target n= 407 (a); day trip n=142 (b)
 a / b indicate statistically significant differences at the 95% level.

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

Comparing Target to Other Travelers

Demographics		2017-18		2018-19		2019-20		2020-21	
		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	35%	37%	26%	33%	42%	27%	55% ^b	30%
	Female	65%	63%	74%	67%	58%	73%	45%	70% ^a
Age	Average	44	42	44	49	42	44	43	47
Marital status	Married	76%	59%	73%	83%	76%	73%	79%	73%
	Divorced/Separated	9%	11%	6%	0%	6%	8%	8%	14%
	Widowed	2%	3%	1%	0%	1%	2%	2%	4%
	Single/Never married	12%	27%	20%	17%	17%	17%	11%	9%
HH income	Average	\$98,432	\$81,020	\$132,804	\$80,583	\$137,357	\$117,042	\$150,893	\$126,045

2017-18 target n=554, day trip n=231; 2018-19 target n=401, day trip n=6; 2019-20 target n= 438, day trip n=125; 2020-21 target n=407 (a); day trip n=142 (b)

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

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

Comparing Target to Other Travelers

Top 2 Box	2017-18		2018-19		2019-20		2020-21	
	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)
Has nice weather	94%	76%	89%	67%	91%	93%	92%	93%
Has beautiful beaches	98%	75%	91%	67%	92%	96%	95%	89%
Has beautiful scenery	96%	71%	91%	67%	92%	91%	91%	89%
Has a variety of dining options at several price points	90%	69%	86%	67%	91%	91%	92%	88%
Has warm weather	94%	77%	91%	83%	90%	89%	86%	88%
Is easy to get to by car	88%	73%	87%	50%	88%	84%	89%	88%
Has a "family-friendly" atmosphere	92%	73%	93%	83%	92%	91%	91%	86%
Is a safe destination	94%	74%	92%	67%	91%	89%	96%	86%
Has a variety of lodging options at multiple price points	86%	71%	89%	67%	88%	84%	89%	86%
Offers a relaxing atmosphere	95%	75%	93%	67%	93%	89%	94%	86%
Offers plenty to see and do	94%	66%	89%	50%	94%	78%	88%	84%
Provides warm Southern hospitality	90%	77%	86%	67%	89%	84%	88%	82%
Offers a good vacation value for the money	88%	69%	85%	67%	86%	82%	86%	82%
Has a clean, unspoiled environment	86%	74%	83%	50%	88%	73%	88%	82%

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

2017-18 target n=554, day trip n=231; 2018-19 target n=401, day trip n=6; 2019-20 target n= 438, day trip n=125; 2020-21 target n=407 (a); day trip n=142 (b)
a / b indicate statistically significant differences at the 95% level.

Comparing Target to Other Travelers

Overall experience	2017-18		2018-19		2019-20		2020-21	
	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	94%	55%	90%	83%	97%	100%	88%	79%
5 (Excellent)	42%	28%	37%	50%	63%	76%	48% ^b	38%
4 (Very good)	51%	27%	53%	33%	34%	24%	40%	41%
3 (Good)	6%	36%	9%	17%	3%	0%	10%	19% ^a
2 (Fair)	0%	7%	1%	0%	0%	0%	2%	1%
1 (Poor)	0%	2%	0%	0%	0%	0%	0%	1%

Likelihood to recommend	2017-18		2018-19		2019-20		2020-21	
	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	95%	70%	96%	83%	92%	93%	97%	84%
5 (Extremely likely)	72%	44%	64%	67%	70%	82%	68%	70%
4	22%	26%	32%	17%	22%	11%	29% ^b	14%
3	5%	19%	4%	17%	6%	7%	2%	11% ^a
2	0%	6%	0%	0%	1%	0%	0%	0%
1 (Not at all likely)	0%	4%	0%	0%	1%	0%	0%	5% ^a

2017-18 target n=554, day trip n=231; 2018-19 target n=401, day trip n=6; 2019-20 target n= 438, day trip n=125; 2020-21 target n=407 (a); day trip n=142 (b)
a / b indicate statistically significant differences at the 95% level.

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

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

Comparing Target to Other Travelers

Likelihood to visit again in the next year	2017-18		2018-19		2019-20		2020-21	
	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)	88%	64%	82%	67%	84%	89%	90%	82%
5 (Already planning a trip)	34%	21%	36%	17%	30%	24%	31%	29%
4 (Very likely)	54%	42%	46%	50%	55%	64%	60%	54%
3 (Somewhat likely)	10%	25%	12%	33%	13%	11%	8%	13%
2 (Not very likely)	2%	6%	6%	0%	2%	0%	1%	2%
1 (Not at all likely)	0%	5%	0%	0%	1%	0%	1%	4%

During which season(s) would you be most likely to visit (of those likely to visit)	2017-18		2018-19		2019-20		2020-21	
	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	36%	25%	40%	67%	45%	69%	43%	45%
Summer	64%	57%	51%	33%	51%	69%	61%	75% ^a
Fall	29%	29%	37%	17%	40%	44%	32%	36%
Winter	28%	20%	38%	67%	35%	38%	26%	25%

2017-18 target n=554, day trip n=231; 2018-19 target n=401, day trip n=6; 2019-20 target n= 438, day trip n=125; 2020-21 target n=407 (a); day trip n=142 (b)

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

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

Question text: [IF SOMEWHAT LIKELY OR ABOVE] During which season(s) would you be most likely to visit? Select all that apply. Response options: Spring, Summer, Fall, Winter

Comparing Target to Other Travelers

Top states of origin	2017-18		2018-19		2019-20		2020-21	
	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	15%	6%	11%	-	42%	35%	29%	19%
Florida	17%	26%	14%	33%	11%	42%	29%	19%
Georgia	5%	10%	10%	-	4%	4%	20%	18%
Illinois	3%	2%	15%	-	2%	2%	-	-
Indiana	2%	3%	4%	-	2%	-	-	-
Kentucky	6%	2%	-	-	1%	-	-	-
Louisiana	7%	6%	11%	-	8%	-	2%	11% a
Michigan	5%	1%	7%	-	2%	-	-	-
Missouri	3%	3%	6%	-	2%	-	-	2%
Mississippi	8%	3%	1%	17%	7%	6%	13%	7%
Ohio	3%	6%	-	-	1%	-	-	-
Oklahoma	2%	1%	-	-	1%	-	-	-
Tennessee	6%	6%	7%	-	4%	-	5%	8%
Texas	12%	16%	8%	33%	3%	-	-	-
Wisconsin	4%	3%	6%	-	2%	2%	-	-

2017-18 target n=554, day trip n=231; 2018-19 target n=401, day trip n=6; 2019-20 target n= 438, day trip n=125; 2020-21 target n=407 (a); day trip n=142 (b)
a / b indicate statistically significant differences at the 95% level.

Comparing Non-Target Trips Year-Over-Year

General activities (non-target trips)	2017-18		2018-19		2019-20		2020-21	
	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	64%	32%	66%	17%	55%	25%	52% ^b	30%
Dining out	52%	30%	61%	33%	73%	31%	48% ^b	30%
Shopping	41%	23%	50%	50%	50%	23%	42% ^b	28%
Relaxing	49%	31%	56%	50%	58%	13%	46% ^b	24%
Photography	16%	10%	16%	0%	17%	0%	18%	16%
Watching wildlife	22%	12%	17%	17%	10%	1%	19%	15%
Sightseeing	40%	18%	41%	17%	35%	1%	28% ^b	15%
Visiting friends/relatives who live in the area	12%	10%	20%	17%	12%	0%	17%	13%
Historical sites	12%	11%	15%	17%	4%	1%	17%	13%
Swimming	27%	20%	30%	0%	30%	5%	19%	13%
Family/friends reunion	18%	8%	15%	0%	3%	0%	15%	11%
Bicycle riding	7%	9%	13%	33%	10%	1%	17% ^b	10%
Birdwatching	9%	4%	6%	0%	4%	1%	10%	9%
Fishing	14%	12%	11%	0%	13%	0%	19% ^b	8%
Exercise/Working out	12%	7%	18%	0%	9%	11%	12%	8%
Hiking on trails	12%	11%	19%	0%	12%	0%	13%	8%
Tennis	9%	4%	3%	0%	2%	1%	11%	7%
Kayaking/Canoeing/Paddle boarding	13%	4%	11%	0%	7%	0%	10%	7%
Parasailing/Jet skiing	5%	2%	4%	0%	3%	0%	10%	7%
Visiting a spa	8%	5%	9%	0%	7%	0%	13% ^b	7%
Golfing	5%	5%	9%	0%	4%	1%	10%	7%
Boating or sailing	8%	8%	11%	0%	5%	1%	12% ^b	6%
Concerts and nightlife	9%	0%	13%	0%	8%	0%	18% ^b	6%
Sporting events	1%	3%	3%	0%	8%	6%	10%	5%
Shelling	18%	6%	21%	0%	12%	23%	25% ^b	5%
Festivals or special events (non-sports)	7%	5%	12%	0%	4%	0%	13% ^b	4%
Scuba diving/Snorkeling	7%	4%	6%	0%	5%	0%	9% ^b	3%
Dolphin tour	11%	8%	14%	0%	22%	0%	18% ^b	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.

2017-18 target n=554, day trip n=231; 2018-19 target n=401, day trip n=6; 2019-20 target n= 438, day trip n=125; 2020-21 target n=407 (a); day trip n=142 (b)
a / b indicate statistically significant differences at the 95% level.

Comparing Non-Target Trips Year-Over-Year

Specific attractions (non-target trips)	2017-18		2018-19		2019-20		2020-21	
	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)
Tanger Outlets	7%	7%	27%	17%	28%	11%	19%	20%
Alabama Gulf Coast Zoo	3%	3%	14%	0%	4%	0%	16%	10%
Alabama's Coastal Connection Scenic Byway	5%	3%	15%	0%	9%	1%	12%	8%
Fort Morgan Historic Site	9%	2%	12%	0%	5%	0%	16% ^b	8%
Gulf State Park	8%	6%	26%	0%	15%	5%	23% ^b	7%
Bon Secour National Wildlife Refuge	9%	3%	10%	0%	4%	0%	12%	7%
The Wharf	14%	6%	27%	0%	28%	12%	28%	7%
Dauphin Island	11%	6%	11%	0%	6%	0%	17% ^b	6%
Battleship USS Alabama	7%	3%	12%	0%	11%	6%	11%	4%
Bellingrath Gardens	5%	2%	3%	0%	4%	0%	9%	4%
OWA Park	5%	2%	5%	0%	12%	27%	15% ^b	4%
Waterville	7%	3%	5%	0%	1%	0%	6%	4%
National Naval Aviation Museum	7%	5%	14%	0%	2%	0%	8%	4%
The Track	3%	2%	6%	0%	4%	0%	6%	4%
Hugh S. Branyon Backcountry Trail	3%	0%	3%	0%	7%	0%	8% ^b	3%
Adventure Island	5%	3%	13%	0%	11%	0%	9% ^b	3%

2017-18 target n=554, day trip n=231; 2018-19 target n=401, day trip n=6; 2019-20 target n= 438, day trip n=125; 2020-21 target n=407 (a); day trip n=142 (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.