



# **GULF SHORES & ORANGE BEACH TOURISM**

Alabama's White-Sand Beaches

## Visitor Profile Research

Winter 2021-22

Strategic Marketing & Research Insights LLC

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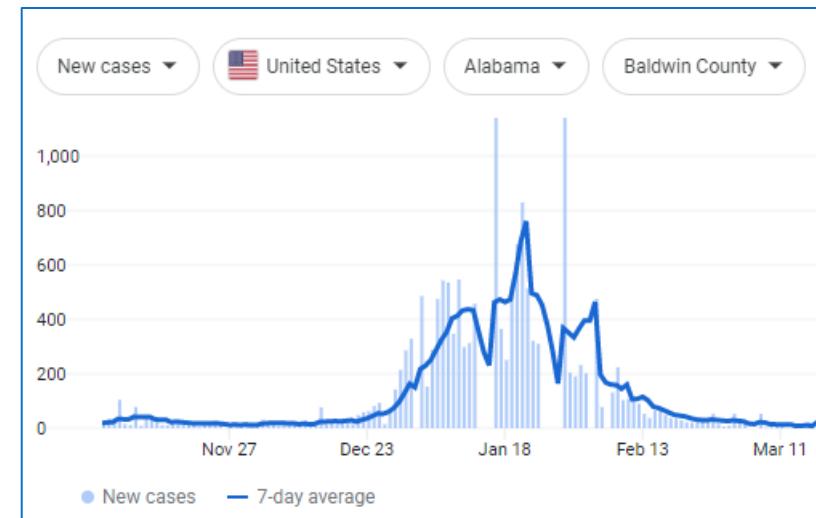


# Introduction

Visitor Profile Research – Winter 2021-22

# 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 2021.
- The COVID-19 pandemic brought with it global disruptions to travel. Leisure travel has remained low globally since Spring 2020, and there have been changes in the travel landscape in terms of who is traveling, how people plan, and what leisure activities they choose. As of Winter 2021-22, the Omicron variant was causing spikes in case counts nationwide and, as shown here, in Gulf Shores/Orange Beach.
- In addition to the typical objectives of the quarterly research (outlined on the following page), this wave of research continued to explore visitor familiarity with beach safety and sustainability initiatives.



New York Times data via Google.

# Research Objectives

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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 Falls



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

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- This report presents information collected through online surveys of visitors to Gulf Shores, Orange Beach or Fort Morgan during Winter 2021 (December 2021 through February 2022).
- Potential respondents were screened to ensure they were travelers to the Gulf Shores/Orange Beach area and were at least 25 years of age.
- Travelers were asked about multiple trips.
- Target data is weighted to match the destination's actual occupancy rates (hotel and vacation rental) over the relevant time period, which in Winter 2021 was 85% condo/vacation rentals and 15% hotel stays.
- Surveys were conducted in the markets that 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.

Number of trips represented in the data	Winter 2021-22
Target trips (stayed 1-30 nights in paid accommodations)	388
Non-target trips (visited but did not stay overnight)	122



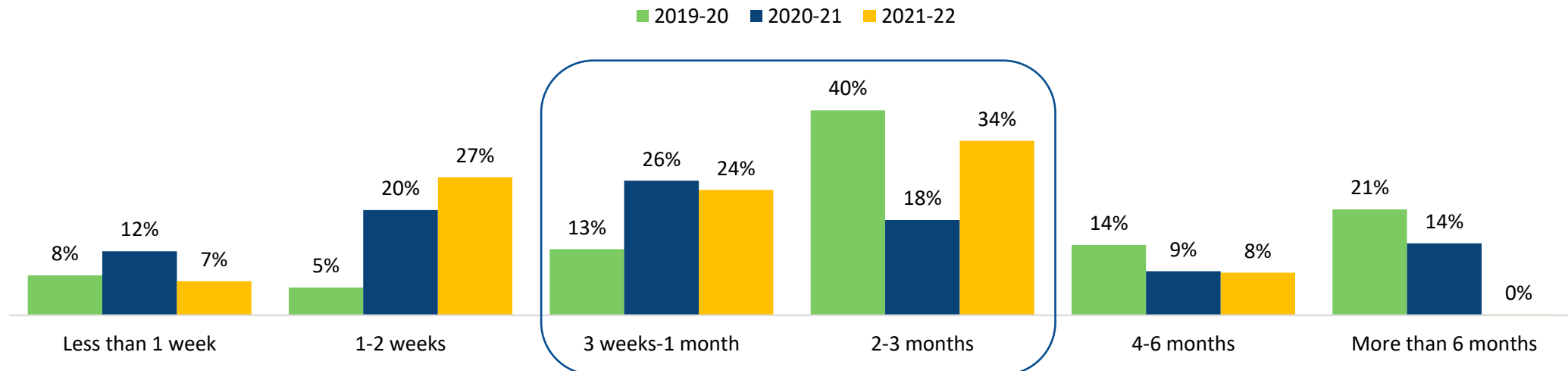
# Detailed Findings

Visitor Profile Research – Winter 2021-22

# Travel Planning

- Long-term planning of more than 6 months had phased out as of Winter 2021-22.
- More winter trips were planned 1-2 weeks ahead of travel than we've seen before. This could be due to travelers considering weather and pandemic-related circumstances.
- Trip planning 3 weeks to 3 months ahead of travel looked more like pre-pandemic levels.

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



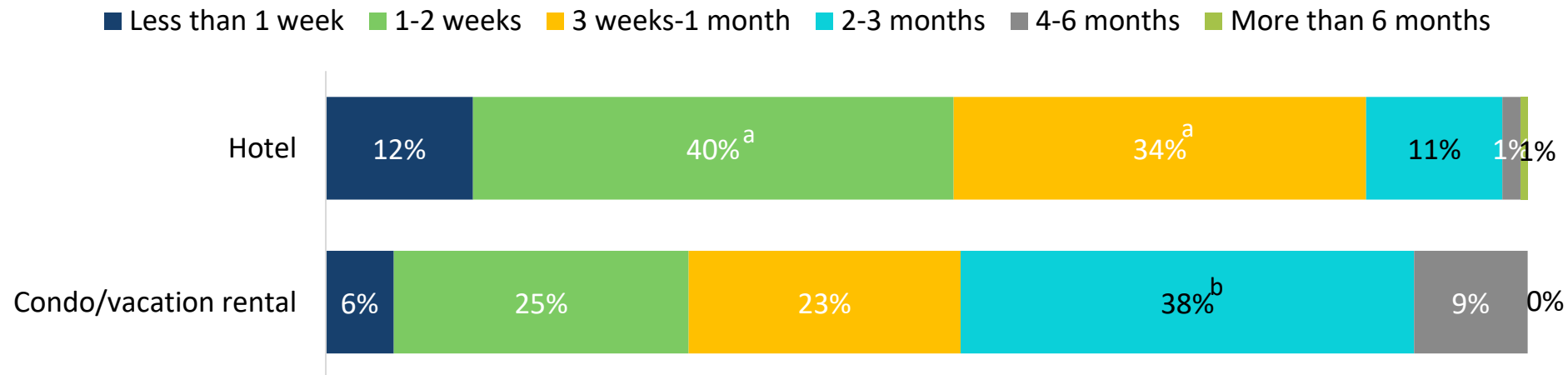
Question text: How far in advance did you begin planning your trip to Gulf Shores/Orange Beach? Response options as shown in graph above.



# Travel Planning – Hotel vs. Condo Rental

- As we continue to see, condo stayers generally plan their GS/OB trips further in advance than hotel stayers. Condo stayers tend to be repeat visitors.

**Winter Trip Planning Horizon by Lodging Type**

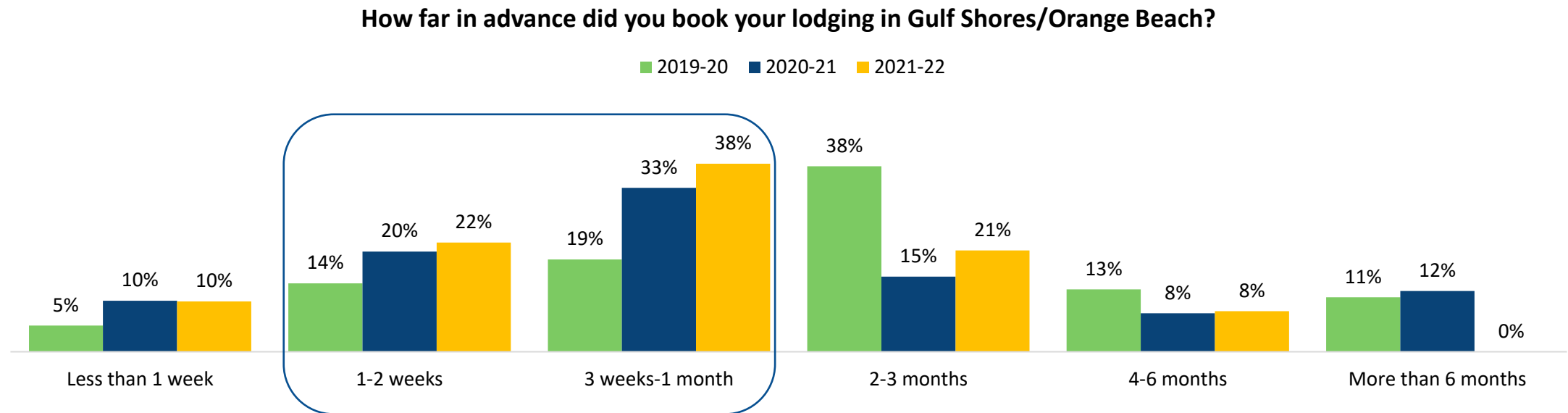


Vacation rental/condo n=53 (a); Hotel/motel n=335 (b); a / b indicate statistically significant differences at the 95% level.

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 Booking

- As with trip planning, lodging booking has shifted from long-term to shorter-term.
- More than half of winter lodging was booked between 1 week and 1 month in advance of travel, which is at least a couple of weeks shorter than in prior winters.

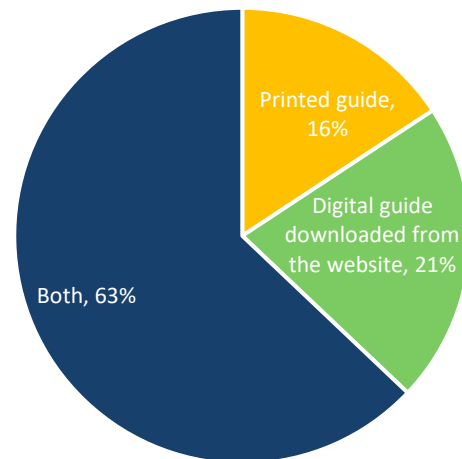


Question text: How far in advance did you book your lodging in Gulf Shores/Orange Beach? Response options as shown in graph.

# Travel Planning – Resources

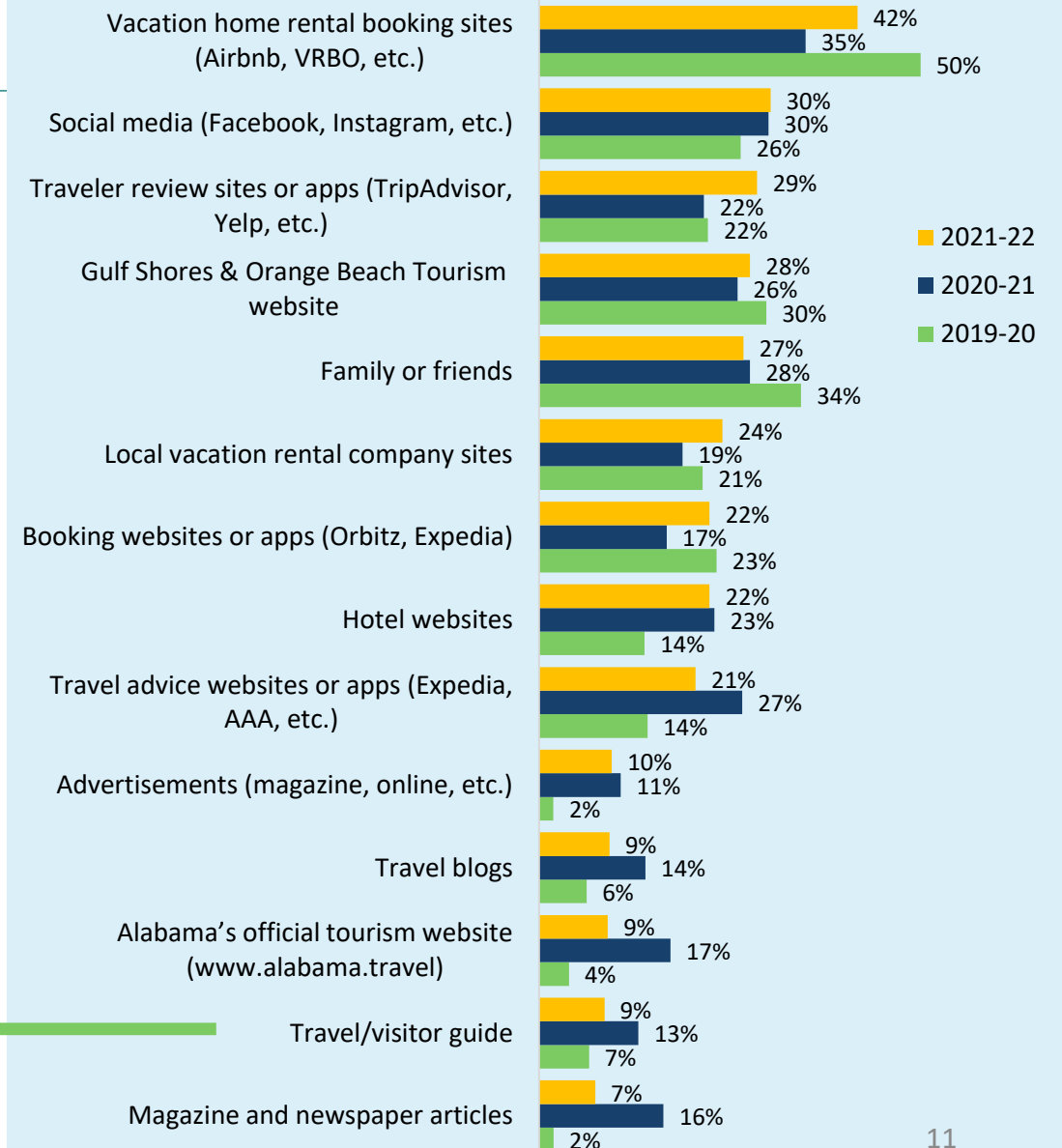
- Compared to last winter, booking sites were used more than most general information resources. This usage pattern looks more like pre-pandemic.
- Overall visitor guide usage is down from last winter, with more visitors using both the digital and print versions. Previously, more visitors used print only.

**Visitor Guide format (2021-22)**



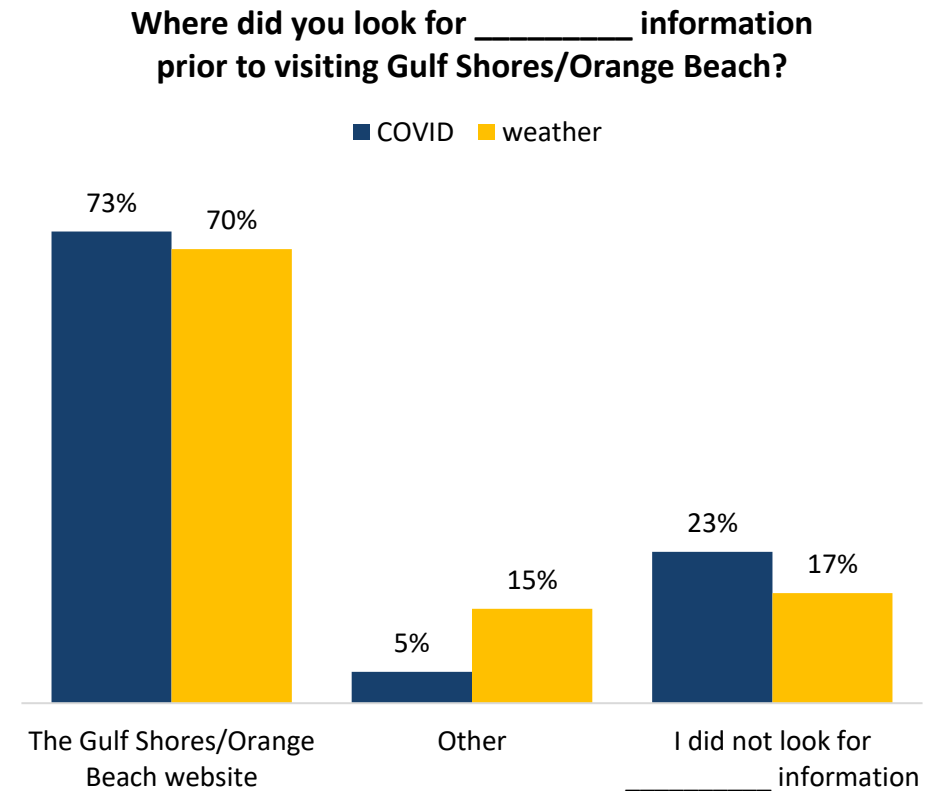
Question text: Which of the following resources did you use to plan your trip to Gulf Shores/Orange Beach?  
Response options as shown in graph.

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



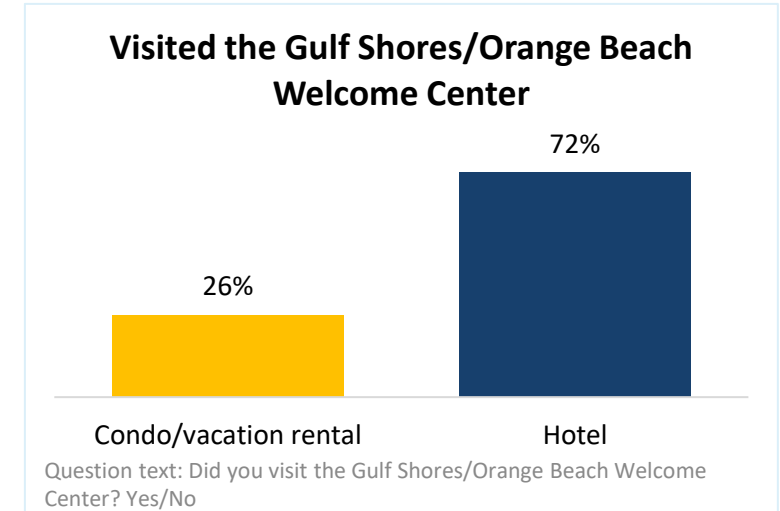
# Travel Planning – GSOBT Website

- Seven in 10 winter visitors used the GSOBT website to look for information on COVID-19 in the destination prior to visiting, and as many used the website to find information on weather.
- This is an increase from last fall when fewer than 60% of visitors looked to the website specifically for COVID information prior to visiting.

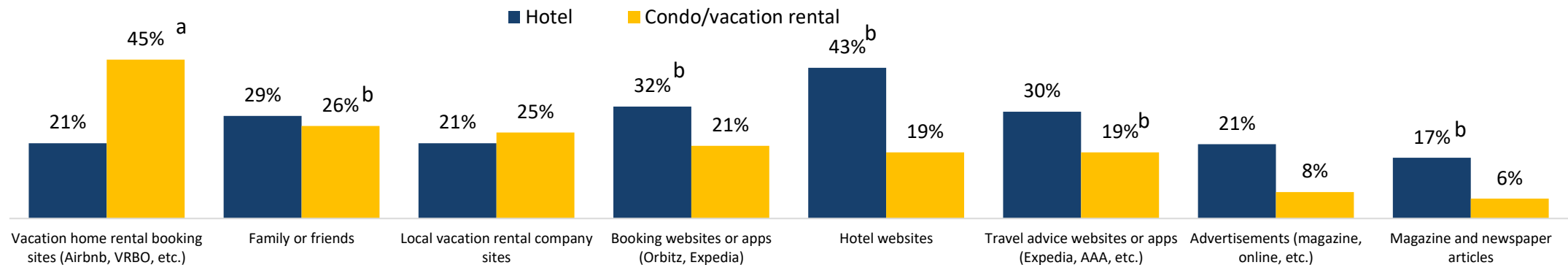


# Travel Planning – Hotel vs. Condo Rental

- As we would expect, condo stayers use vacation home rental booking sites, and hotel stayers use hotel websites.
- Hotel stayers continue to be the main users of welcome centers.



**Trip planning resources with biggest difference by lodging type**



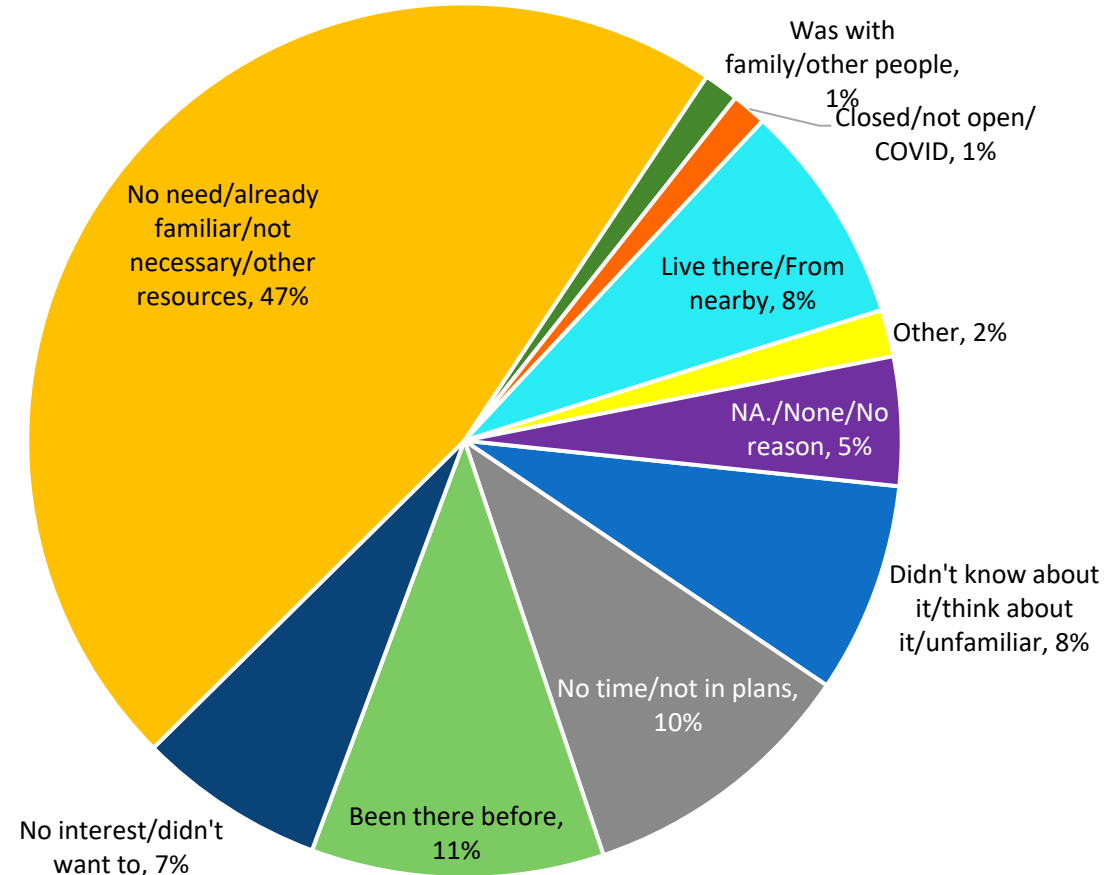
Vacation rental/condo n=53 (a); Hotel/motel n=335 (b); a / b indicate statistically significant differences at the 95% level.

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

# Travel Planning

- Of those who did not visit a Welcome Center, the most common reason – given by half of non-users – is already being familiar with the destination.

## Why didn't you visit the Welcome Center?

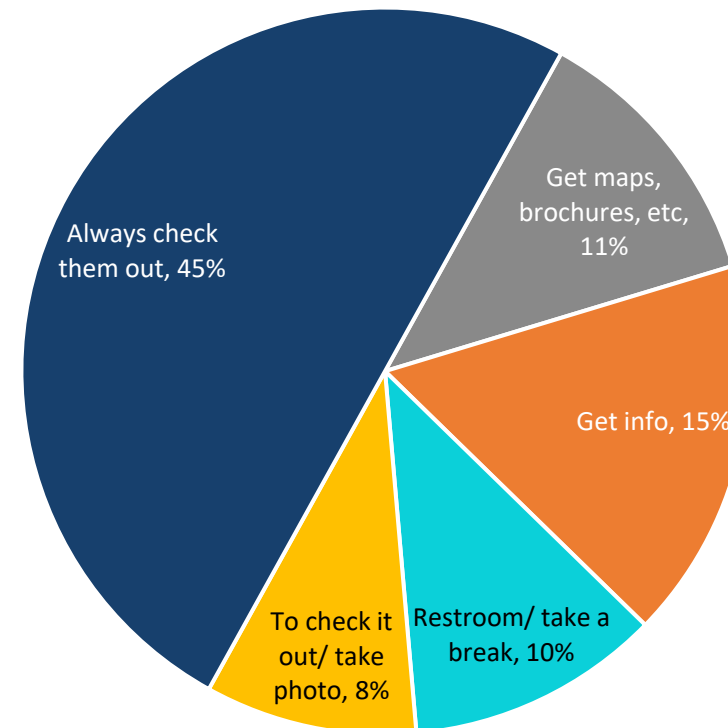


Question text: Why didn't you visit the welcome center? [Open ended response]

# Travel Planning – Welcome Center Visitors

- The main reason for stopping at a GSOBT Welcome Center was to get information.
- This is consistent with less-familiar visitors using the Welcome Centers.
- Hotel stayers, more of whom are newer, less familiar visitors, use the Welcome Centers at a higher rate.

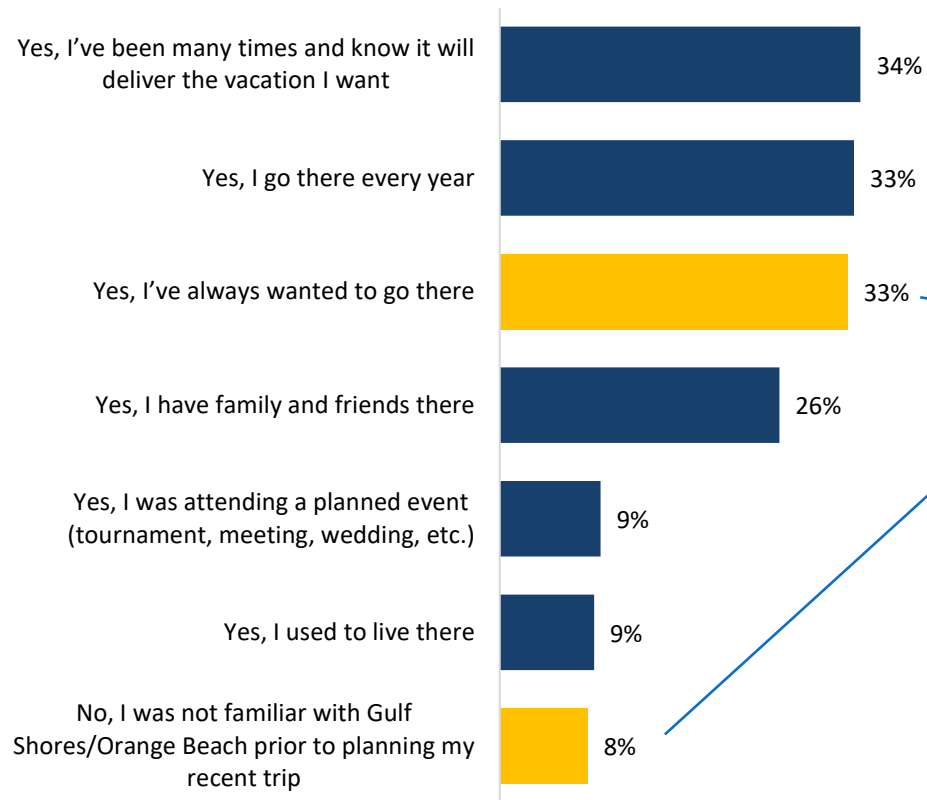
Why did you visit the Welcome Center?



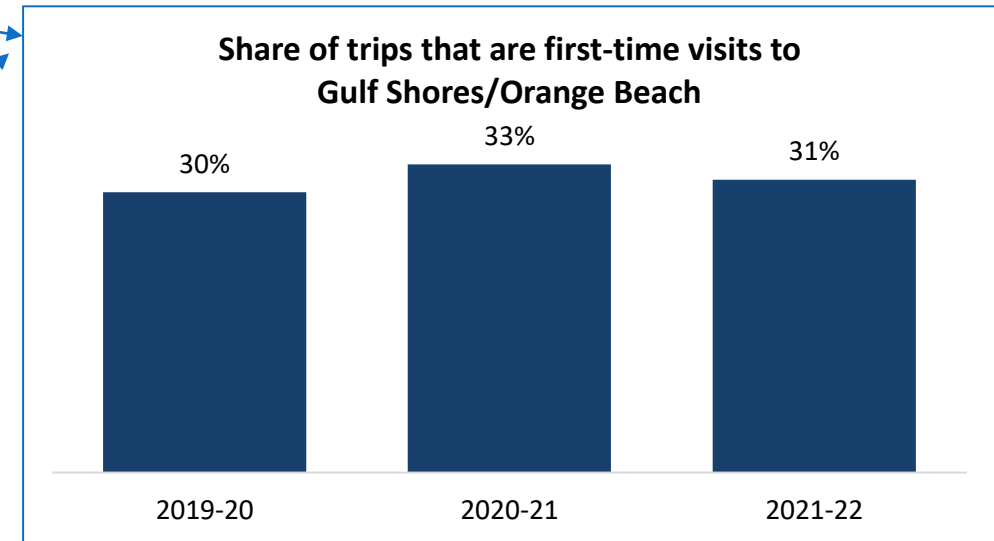
Question text: Why did you visit the welcome center? [Open ended response]

# Trip Characteristics

## Prior to this visit, was Gulf Shores/Orange Beach familiar to you?



- Nearly a third of Winter 2021-22 visitors were first-timers, which is in line with prior Winter measures.
- Most Winter visitors had been many times and/or have family and friends in the area. A third are annual visitors.



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

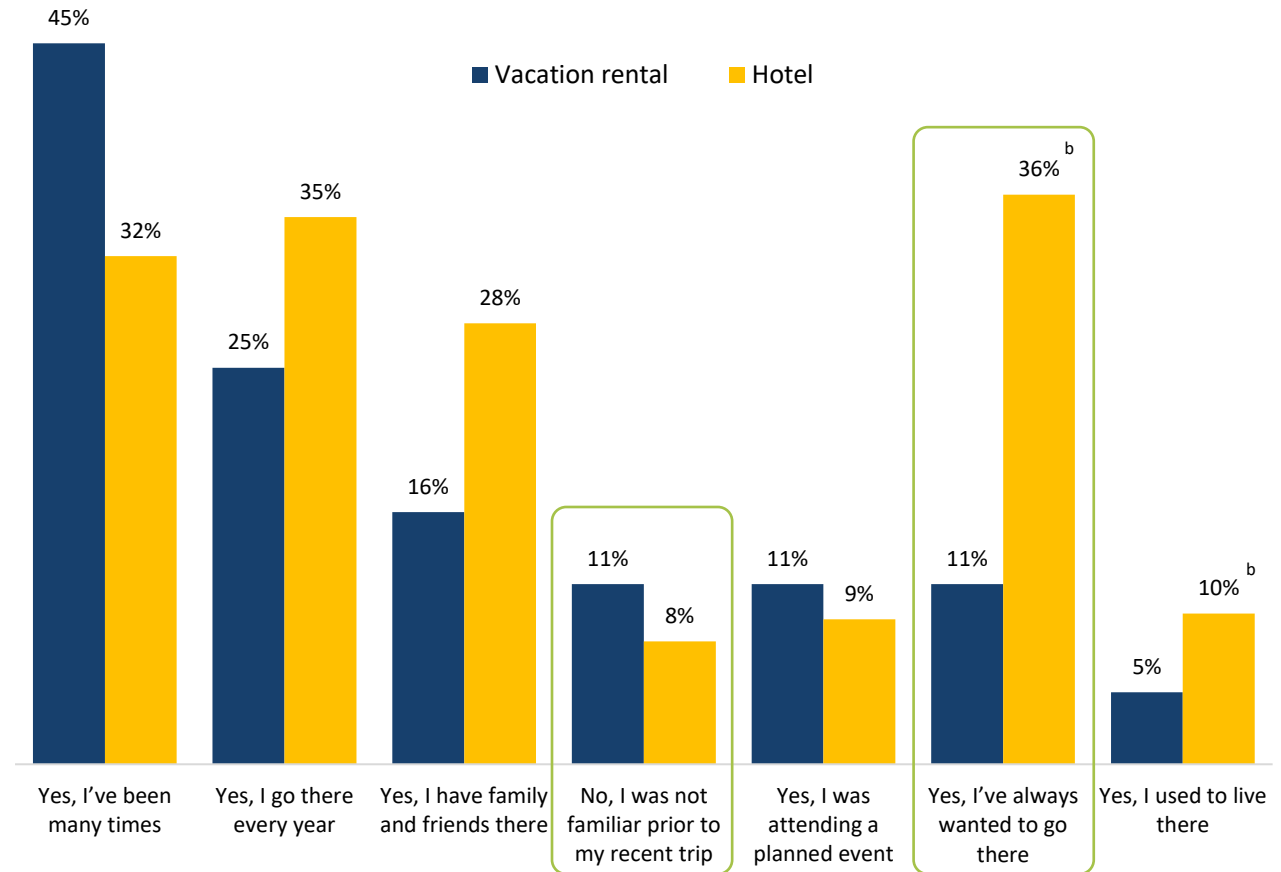


Winter visitors who stay in vacation rentals are more likely to be repeat/annual visitors.

Hotel stayers are more likely to be aspirational visitors, unfamiliar with the destination prior to visiting.

This is consistent with prior measures.

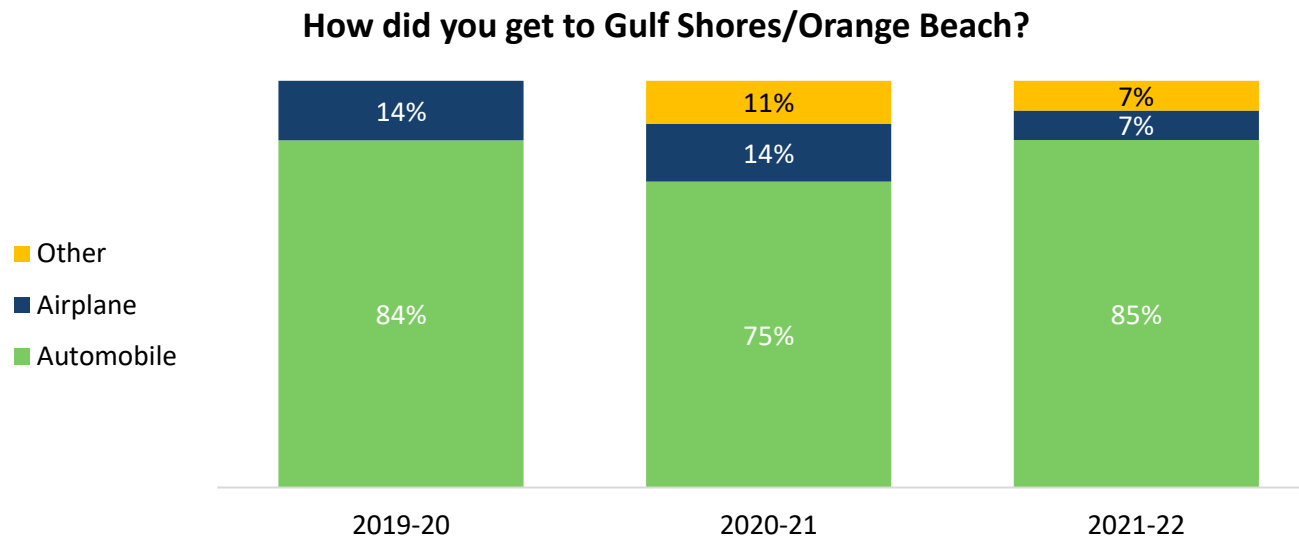
### Differences in Reasons for Familiarity



Vacation rental/condo n=53 (a); Hotel/motel n=335 (b); a / b indicate statistically significant differences at the 95% level.  
Question text: Prior to your visit, was Gulf Shores/Orange Beach familiar to you? Response options as shown in graph.

# Trip Characteristics – Drive vs. Fly

- Most Winter visitors drove to GS/OB. Automobile travel is consistently the main way of accessing the destination. This is consistent with shorter planning horizons as car trips are more flexible than air travel, particularly in light of cancellations and complications in air travel in recent years.



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

# Trip Characteristics

- GS/OB beaches remain the most common attraction for Winter trips, following by dining out and relaxing. This is also what we saw in Fall data.
- With the Omicron variant spreading during the Winter months, there was high participation in outdoor activities – especially beaches, Gulf State Park, fishing, and the scenic byway. This is in contrast to Fall, when we began to see a return to more developed attractions.

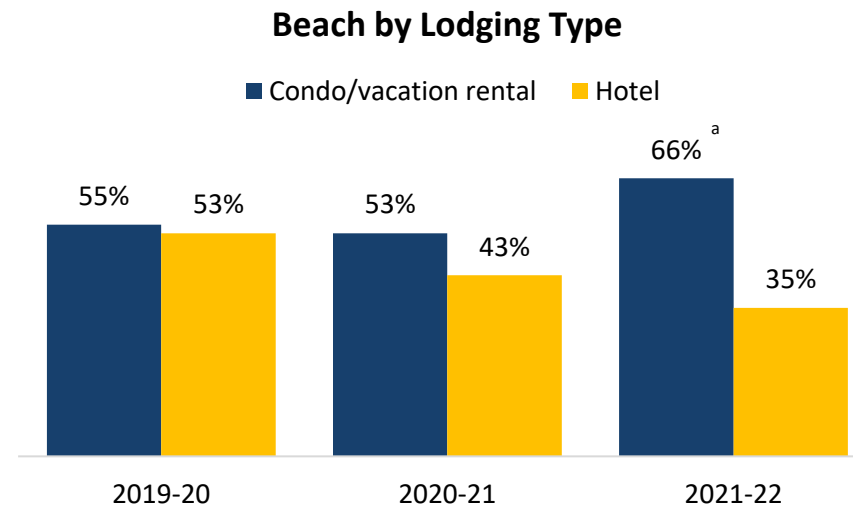
Winter trip participation	2019-20	2020-21	2021-22
Beaches	55%	52%	62%
Dining out	73%	48%	54%
Relaxing	58%	46%	53%
Shopping	50%	42%	44%
Sightseeing	35%	28%	39%
Swimming	30%	19%	29%
Shelling	12%	25%	26%
Tanger Outlets	28%	19%	25%
Gulf State Park	15%	23%	24%
Watching wildlife	10%	19%	22%
Visiting friends/relatives who live in the area	12%	17%	20%
Adventure Island	11%	9%	19%
Photography	17%	18%	19%
Exercise/Working out	9%	12%	18%
Fishing	13%	19%	18%
Alabama Gulf Coast Zoo	4%	16%	16%
Historical sites	4%	17%	15%
Alabama's Coastal Connection Scenic Byway	9%	12%	15%
Birdwatching	4%	10%	13%
Fort Morgan Historic Site	5%	16%	13%
Family/friends reunion	3%	15%	13%
Dauphin Island	6%	17%	12%
Hiking on trails	12%	13%	12%
The Wharf	28%	28%	11%
Parasailing/Jet skiing	3%	10%	11%
Boating or sailing	5%	12%	11%

Cont'd.	2019	2020	2021
Dolphin tour	22%	18%	10%
Golfing	4%	10%	10%
Bellingrath Gardens	4%	9%	10%
Battleship USS Alabama	11%	2%	9%
Concerts and nightlife	8%	18%	9%
Festivals or special events (non-sports events)	4%	13%	9%
Visiting a spa	7%	13%	8%
The Track	4%	6%	8%
Scuba diving/Snorkeling	5%	3%	8%
Civil War History Trail	0%	8%	6%
Kayaking/Canoeing/Paddle boarding	7%	6%	6%
OWA Park	12%	15%	6%
Bon Secour National Wildlife Refuge	4%	12%	6%
Bicycle riding	10%	17%	5%
Sporting events	8%	1%	5%
Coastal Birding Trail	0%	11%	5%
Tennis	2%	11%	3%
Hugh S. Branyon Backcountry Trail	7%	8%	3%

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

- Looking at beach visits by type of accommodations, condo stayers continue to use the beaches at a higher rate than hotel stayers.
- While Fall saw an uptick in beach visits by hotel stayers, that trend reversed in Winter. This could be weather related.

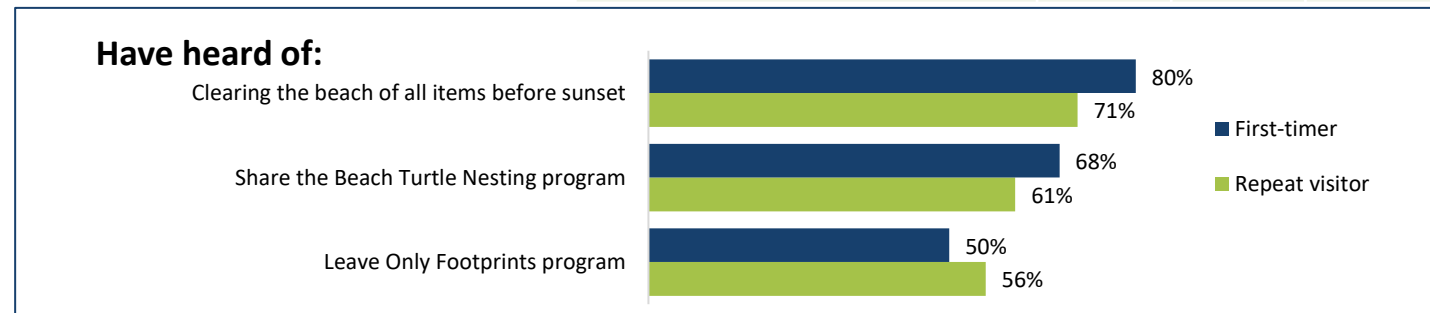


Question text: What attractions and activities did you visit or participate in while in Gulf Shores/Orange Beach on your trip? Response chosen: beach Condo/vacation rental 2021 n=141 (a); Hotel/motel n=209 (b)

# Trip Characteristics – Beach Motivation

- Beaches remain the leading motivator for Winter visitors to choose GS/OB as their trip destination, with relaxation a very close second.
- There is very high awareness of GS/OB pre-sunset beach clearing and the turtle nesting program, especially among first-time Winter visitors. This would be attributable to GSOBT's communications plan for these programs and could also be a function of new visitors doing more research prior to arrival.

Winter trip motivators	2019-20	2020-21	2021-22
Beaches	47%	32%	24%
Relaxing	40%	26%	23%
Dining out	37%	20%	13%
Alabama Gulf Coast Zoo	2%	7%	12%
Alabama's Coastal Connection Scenic Byway	1%	5%	12%
Sightseeing	16%	13%	11%
Shopping	15%	15%	10%
Visiting friends/relatives who live in the area	11%	8%	10%
Concerts and nightlife	4%	5%	10%
Photography	2%	9%	9%



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

# Trip Characteristics

- Trip spending resembles last Winter, with similar spending percentages and higher hotel spending than pre-pandemic. Condo stayers spent less this Winter, however, overall and across most spending categories.

**ALL TARGET VISITORS**

Average Travel Party Expenditures per Trip – WINTER	2019-20		2020-21		2021-22	
	Spending	% of total	Spending	% of total	Spending	% of total
Lodging	\$1,032	58%	\$808	45%	\$670	44%
Meals/food/ groceries	\$334	19%	\$365	20%	\$311	21%
Shopping	\$199	11%	\$290	16%	\$290	19%
Recreation or entertainment	\$144	8%	\$177	10%	\$148	10%
Transportation within Gulf Shores	\$47	3%	\$107	6%	\$49	3%
Other	\$25	1%	\$64	4%	\$44	3%
<b>TOTAL</b>	<b>\$1,781</b>		<b>\$1,811</b>		<b>\$1,512</b>	

**TARGET VISITORS BY LODGING TYPE**

Average Travel Party Expenditures per Trip – WINTER	2019-20		2020-21		2021-22	
	Vacation rental	Hotel	Vacation rental	Hotel	Vacation rental	Hotel
Lodging	\$1,123	\$425	\$877	\$465	\$686	\$447
Meals/food/groceries	\$352	\$223	\$379	\$291	\$313	\$298
Shopping	\$199	\$202	\$271	\$386	\$282	\$374
Recreation or entertainment	\$145	\$133	\$165	\$235	\$139	\$244
Transportation within Gulf Shores	\$40	\$93	\$102	\$130	\$40	\$156
Other	\$25	\$27	\$53	\$123	\$34	\$161
<b>TOTAL</b>	<b>\$1,882</b>	<b>\$1,103</b>	<b>\$1,847</b>	<b>\$1,631</b>	<b>\$1,493</b>	<b>\$1,679</b>

Condo/vacation rental 2018-19 n=109; 2019-20 n=78; 2020-21 n=103; 2021-22 n=53(a)

Hotel/motel 2018-19 n=292; 2019-20 n=377; 2020-21 n=304; 2021-22 n=335(b)

2018-19 n=401; 2019-20 n=455; 2020-21 n=407; 2021-22 n=388

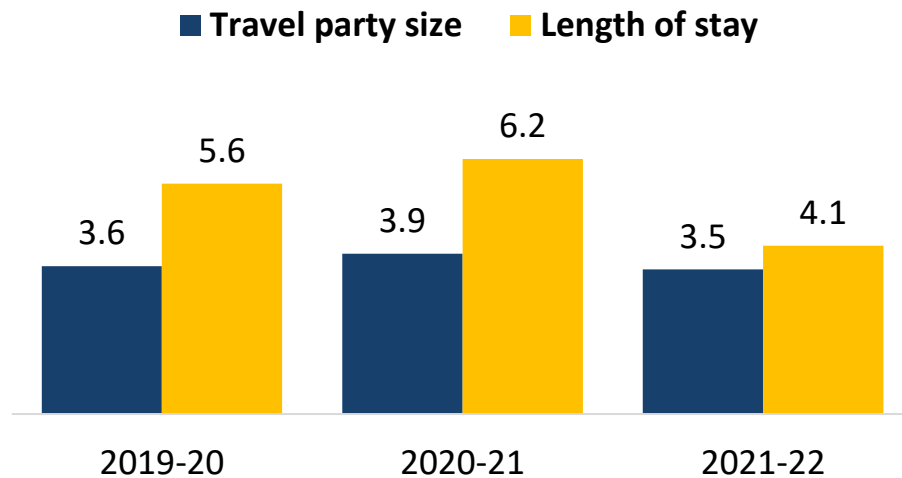
a / b indicate statistically significant differences at the 95% level.

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?

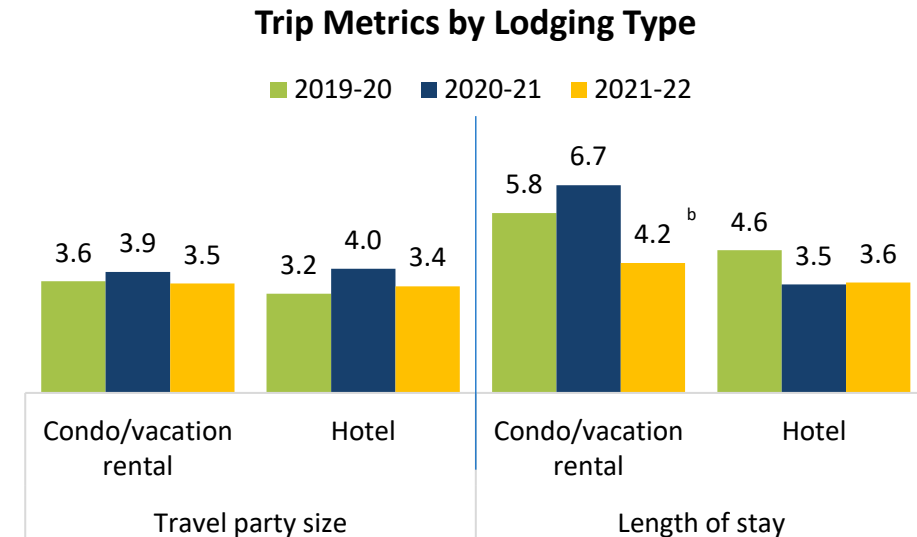
[Category prompts] Open-ended numeric responses.

# Travel Party Characteristics

- Winter trips among target travelers (those staying in paid accommodations for 1-30 nights) were shorter this year than in prior Winters. This is driven by much shorter stays among condo stayers.
- Travel parties were smaller this Winter than last.



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.

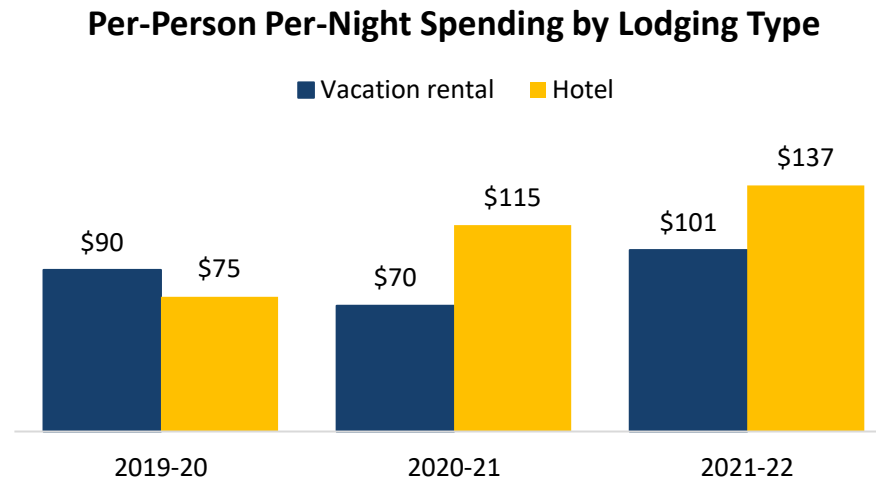
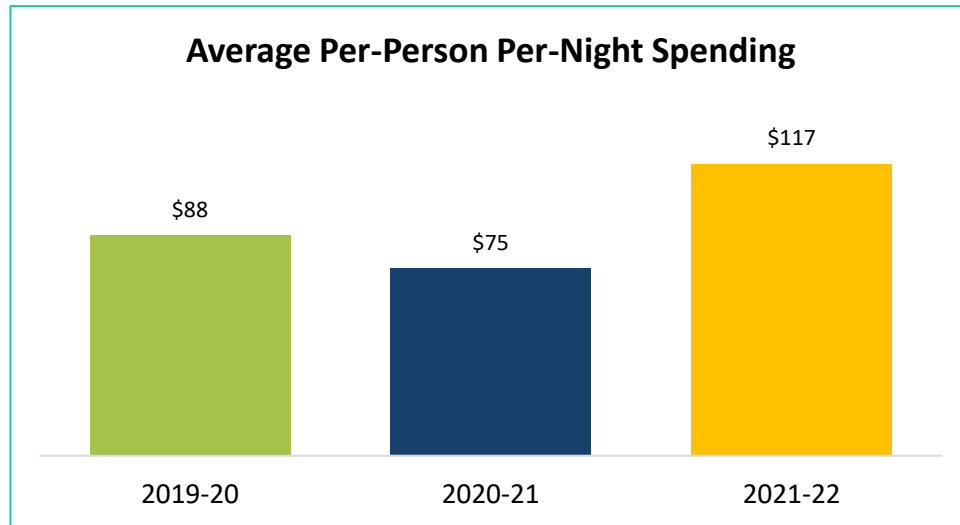


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Hotel/motel 2018-19 n=292; 2019-20 n=377; 2020-21 n=304; 2021-22 n=335(b)

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

# Trip Characteristics

- Lower overall spending is a function of shorter stays and smaller travel parties.
- This is true across both lodging types.

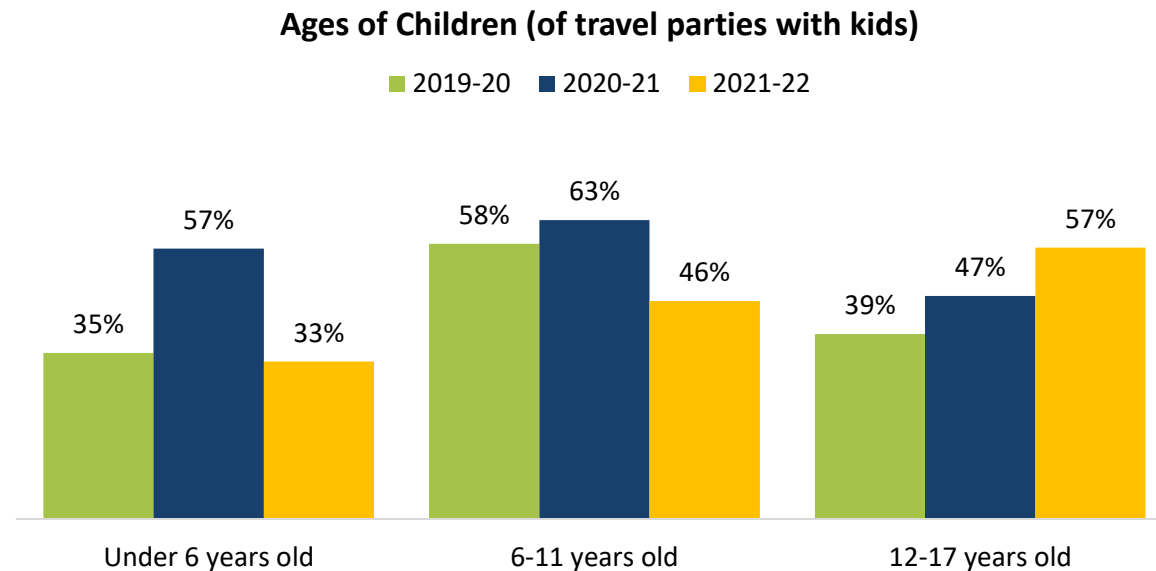


Question text: To help us better understand the economic impact of tourism, what was the approximate amount of money your travel party spent while in Gulf Shores/Orange Beach on your trip? [Category prompts]  
Including yourself, how many people were in your travel party? How many nights did you stay in Gulf Shores/Orange Beach during this trip? If you did not stay overnight, please enter '0'. Open-ended numeric responses.  
Condo/vacation rental 2018-19 n=109; 2019-20 n=78; 2020-21 n=103; 2021-22 n=53(a)  
Hotel/motel 2018-19 n=292; 2019-20 n=377; 2020-21 n=304; 2021-22 n=335(b)



# Travel Party Characteristics

- Nearly a third (31%) of Winter travel parties include children, with more older children present than young children.



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

# Travel Party Characteristics

- This Winter's visitors were younger – in line with pre-pandemic – driven by younger condo-stayers.
- This year's visitors have lower incomes, however.
- Most (72%) Winter visitors have been vaccinated against COVID-19.

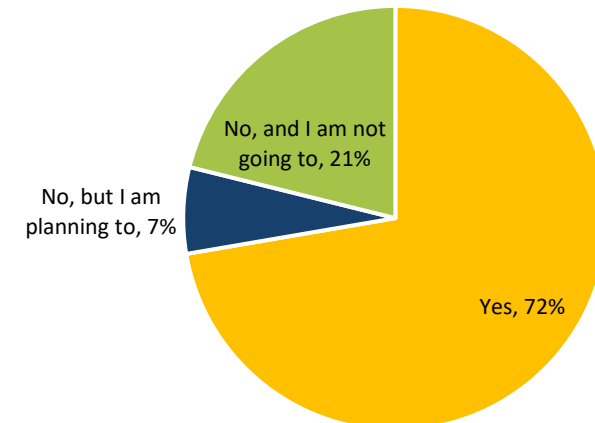
Year-over-Year Demographic Profile Summer visitors		2019-20	2020-21	2021-22
Age	Average	42	43	42
Marital status	Married	76%	79%	80%
	Divorced/Separated	6%	8%	6%
	Widowed	1%	2%	2%
	Single/Never married	17%	11%	12%
HH income	Average	\$137,357	\$150,893	\$119,655

2018-19 n=401; 2019-20 n=455; 2020-21 n=407; 2021-22 n=388

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)

**Have you received the COVID-19 vaccine?**



# Travel Party Characteristics

- The age decrease among visitors is driven by condo stayers.
- Along with age, income and education also declined among condo stayers.
- As we saw in Fall, there is an increase in educators among Winter visitors this year, and healthcare was added as an occupation.

Summer demographic profile by lodging type		2019-20		2020-21		2021-22	
		Vacation rental/condo	Hotel	Vacation rental/condo	Hotel	Vacation rental/condo	Hotel
Age	Average	47	40	51	41	46 <sup>a</sup>	42
Marital status	Married	73%	76%	69%	82%	55%	84%
	Divorced/Separated	8%	5%	9%	8%	16%	5%
	Widowed	0%	1%	9%	0%	5%	1%
	Single/Never married	18%	17%	14%	10%	25%	10%
HH income	Average	\$141,950	\$136,143	\$135,170	\$154,988	\$119,303	\$121,932
Education	College grad+	65%	69%	59%	78%	55%	80% <sup>b</sup>
Occupation	Executive/upper management	8%	25%	10%	32%	14%	27%
	IT professional	8%	22%	16%	26%	7%	23%
	Educator	15%	6%	5%	3%	5%	10%
	Healthcare					18%	6%
	Homemaker	7%	7%	3%	3%	5%	6%
	Student	0%	2%	0%	0%	2%	0%
	Small business owner	12%	4%	5%	5%	7%	11%
	Skilled trade/service	8%	7%	12%	7%	9%	6%
	Other	25%	15%	17%	15%	11%	6%
	Retired	10%	8%	26%	7%	20%	5%
	Not currently employed	7%	4%	5%	3%	2%	1%
Ethnicity	Caucasian/White	87%	83%	90%	84%	86%	83%
	African-American/Black	10%	8%	10%	9%	11%	12%
	Latino/Hispanic	2%	10%	2%	6%	0%	3%
	Asian	3%	5%	2%	3%	0%	0%
	American Indian	0%	2%	0%	1%	2% <sup>a</sup>	0%
	Other	0%	0%	0%	1%	2%	1%

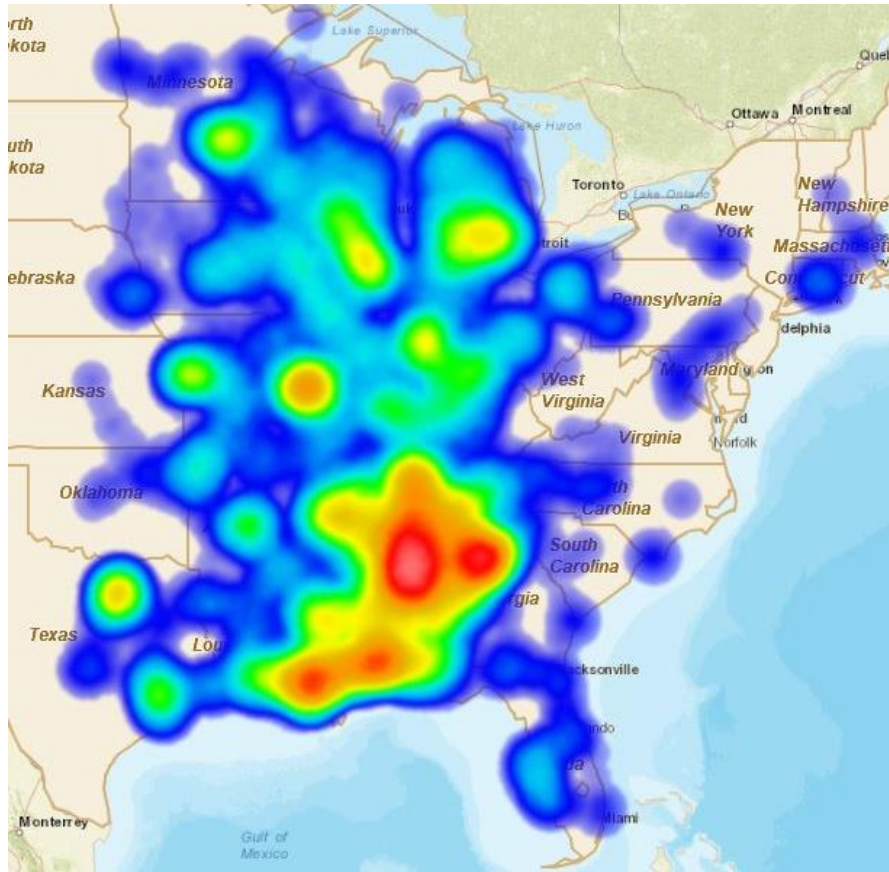
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a / b indicate statistically significant differences at the 95% level.

# Travel Party Characteristics

- Heat map showing source markets of Winter visitors.



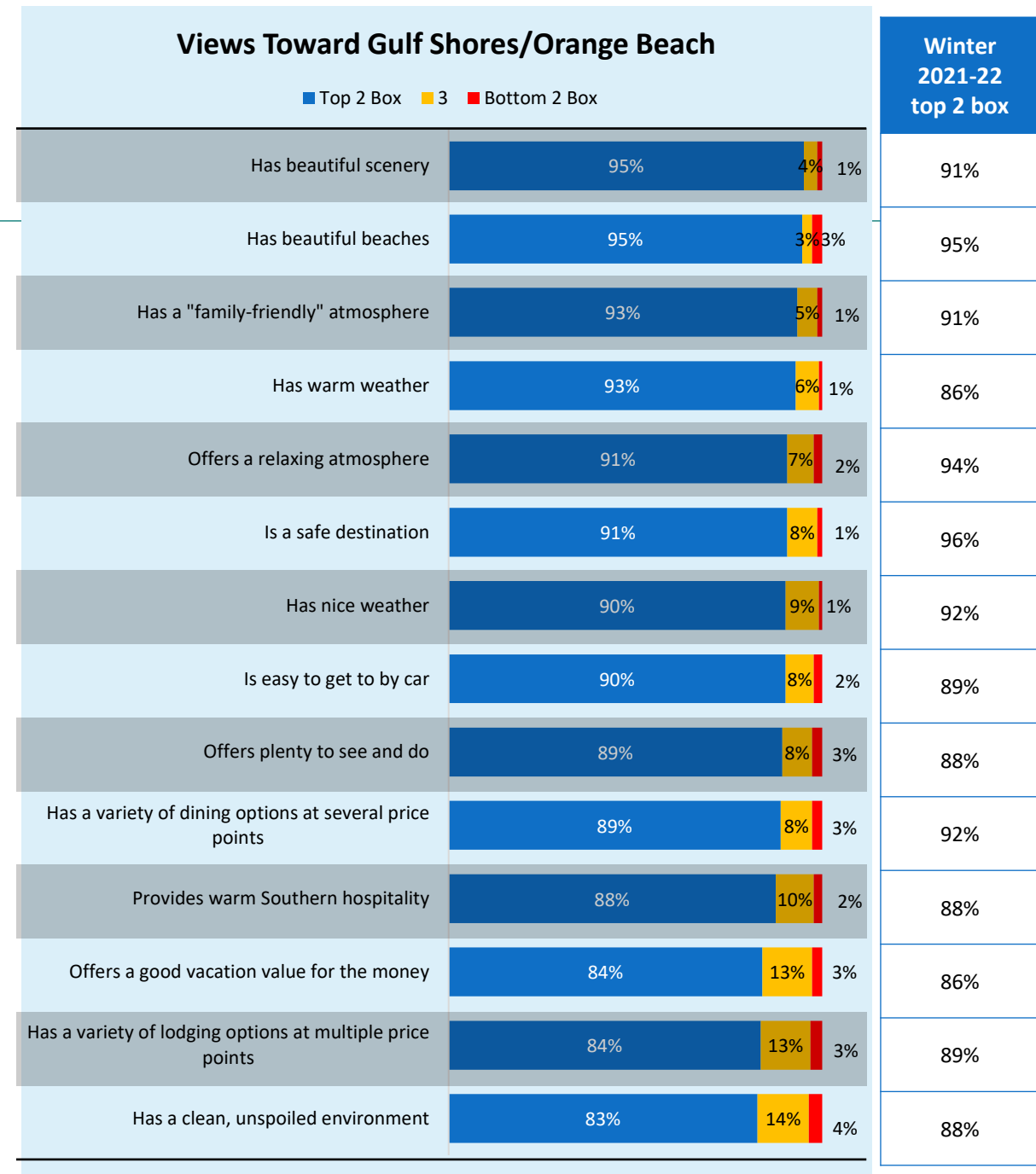
Winter	2020-21	2021-22
Alabama	25%	33%
Tennessee	7%	8%
Mississippi	11%	7%
Louisiana	7%	7%
Georgia	7%	6%
Missouri	4%	6%
Florida	6%	5%
Texas	5%	5%
Illinois	5%	4%
Indiana	3%	3%
Kentucky	2%	2%
Michigan	2%	2%
Wisconsin	2%	2%
Iowa	2%	2%
Arkansas	3%	1%
Ohio	2%	1%

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

# Views Toward GS/OB & Trip Satisfaction

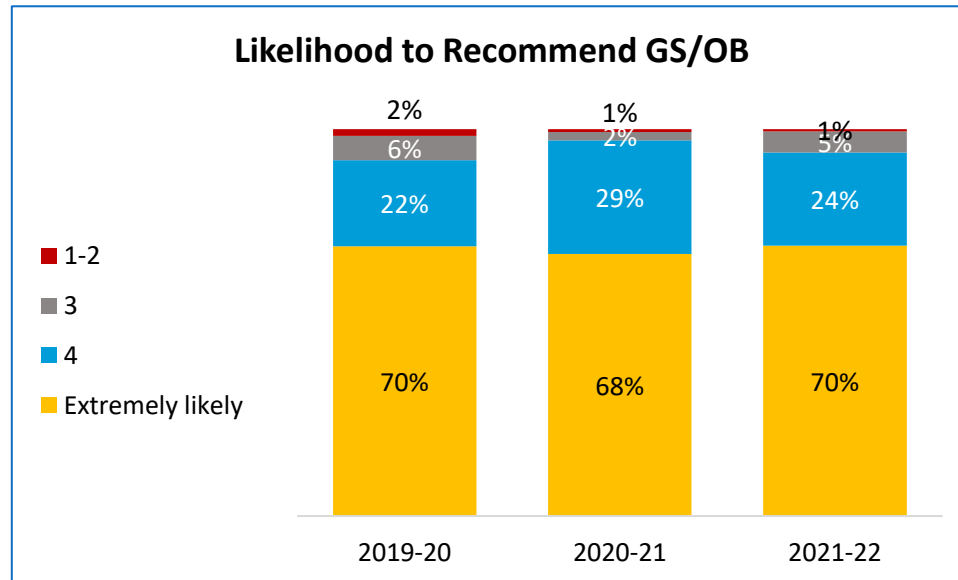
- Agreement is higher this Winter than last that GS/OB has beautiful scenery.
- The year-to-year decline in views of GS/OB as a safe destination could be driven by the spike in COVID cases over the Winter, driven by the highly contagious Omicron variant.
- Ratings by repeat visitors remain high, but first-time visitors rate the area lower on all attributes. An increase in new visitors means lower image ratings.

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



# Views Toward GS/OB & Trip Satisfaction

- Likelihood to recommend the destination is in line with prior Winters.
- Hotel stayers are less likely to recommend GS/OB this year than last. As with image ratings, this is driven by first-time visitors. This makes sense, since repeat visitors are those who are favorable enough about the destination to return; whereas first-time visitors are a mix of those who will and will not return.



How likely are you to recommend Gulf Shores/Orange Beach to your friends or family as a destination to visit for a leisure trip? Summer visitors	2019-20 Top 2 Box %	2020-21 Top 2 Box %	2021-22 Top 2 Box %
Vacation rental/condo	98%	95%	95%
Hotel	96%	99%	94%

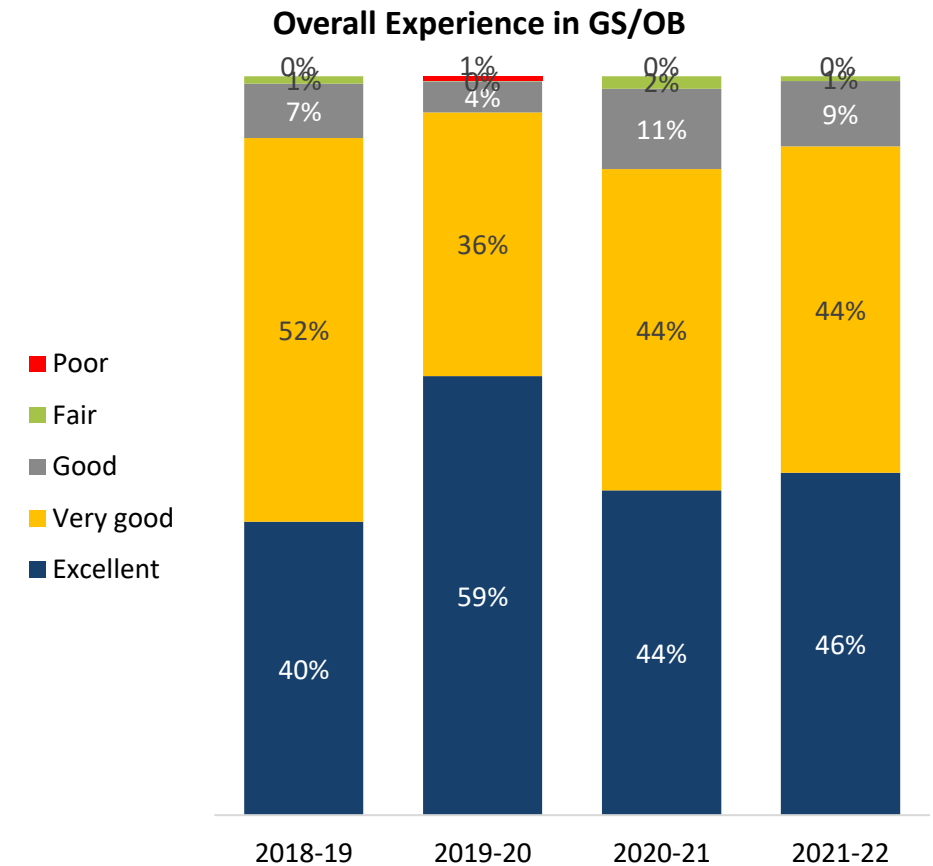
Condo/vacation rental 2018-19 n=109; 2019-20 n=78; 2020-21 n=103; 2021-22 n=53(a)

Hotel/motel 2018-19 n=292; 2019-20 n=377; 2020-21 n=304; 2021-22 n=335(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

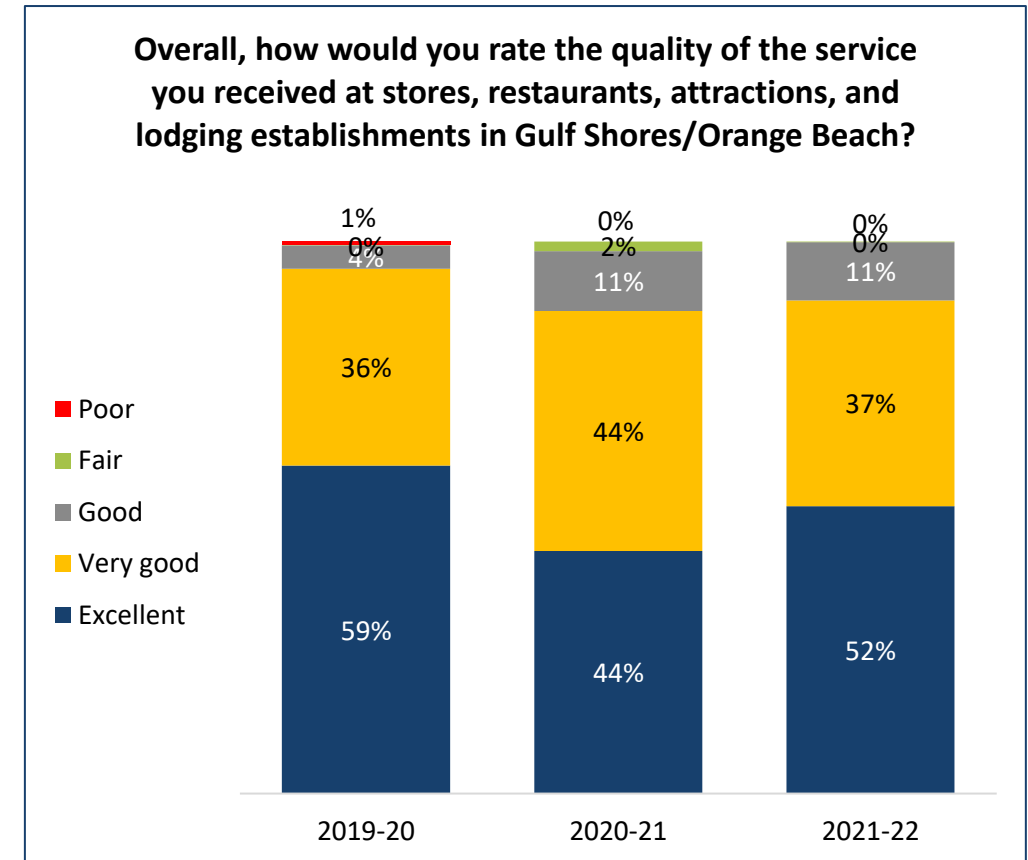
- Both likelihood to visit and overall trip satisfaction are in line with last Winter.
- Looking at this measure over time, it would appear that the Winter 2019-20 measure is an outlier and that the current experience ratings are otherwise very consistent.



Question text: Thinking about your overall experience in Gulf Shores/Orange Beach during your trip, would you say it was...?

# Views Toward GS/OB & Trip Satisfaction

- Ratings of customer service as “excellent” bounced back somewhat from last Winter.
- Staffing shortages and the ongoing pressure of the pandemic – with Omicron causing renewed caution after a more relaxed Fall – continue to impact visitor experience:
  - “No food places were open, the track had few employees all of which being teenagers and didn’t help very much when trying to take my child on rides after spending \$100.”
  - “It was not tourist season so there were no crowds but restaurants close way too early”
  - “No one gets a 100% rating. No one went above and beyond for service. USS Alabama isn't very wheelchair accessible.”
  - “Employees just weren’t very friendly or engaging....post covid and winter....it was as expected”
  - “There was limited service at restaurants.”
  - “the places were open but with covid protocols the person to person contact was kept to a minimum”



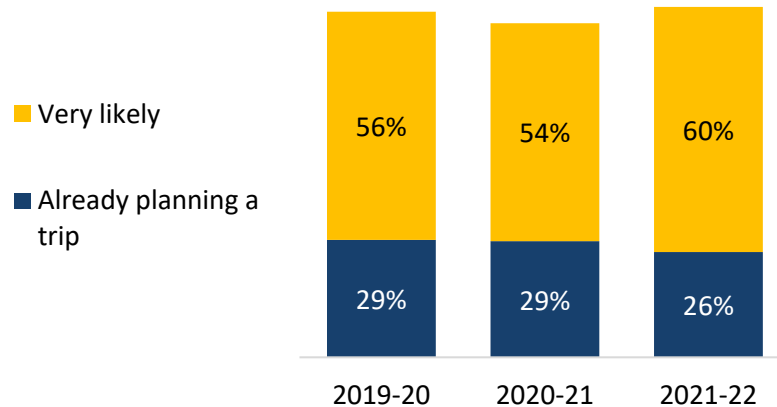
Question text: Overall, how would you rate the quality of the service you received at stores, restaurants, attractions, and lodging establishments in Gulf Shores/Orange Beach?  
Response options: Poor, Fair, Good, Very good, Excellent



# Views Toward GS/OB & Trip Satisfaction

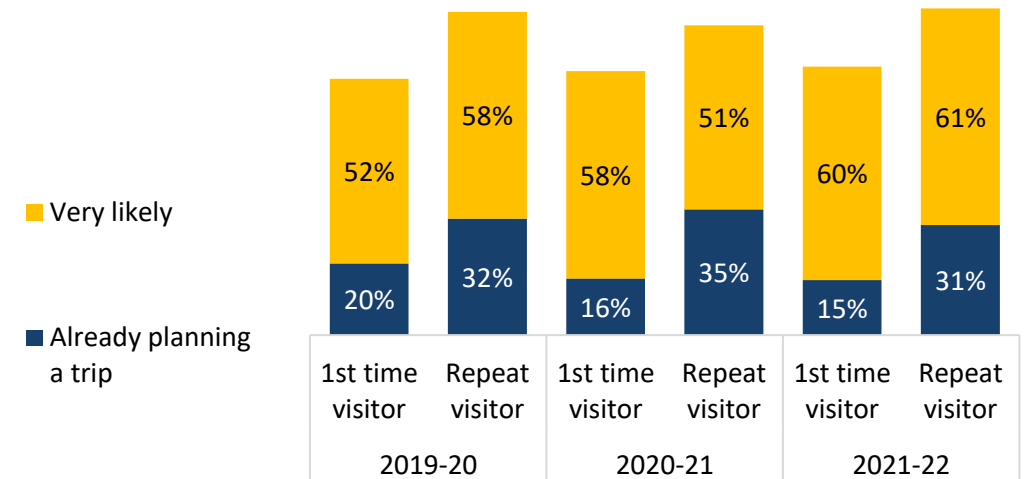
- As with other measures of trip satisfaction, likelihood to return is in line with prior Winters. While about a quarter are already planning a trip – representing a slight decline from 2020-21 – there is growth in those very likely to come back next year.
- Notably, only one Winter visitor reported being not at all likely to return, and two reported being not very likely. Reasons given were that they were in GS/OB for a one-time event and that they travel someplace different every year. So this was not a function of a negative experience.

**Likely to Return to GS/OB in the Next Year**



Of those already planning a return trip to GS/OB:	
I've been many times and know it will deliver the vacation I want	57%
I go there every year	40%
I've always wanted to go there	26%
I have family and friends there	23%

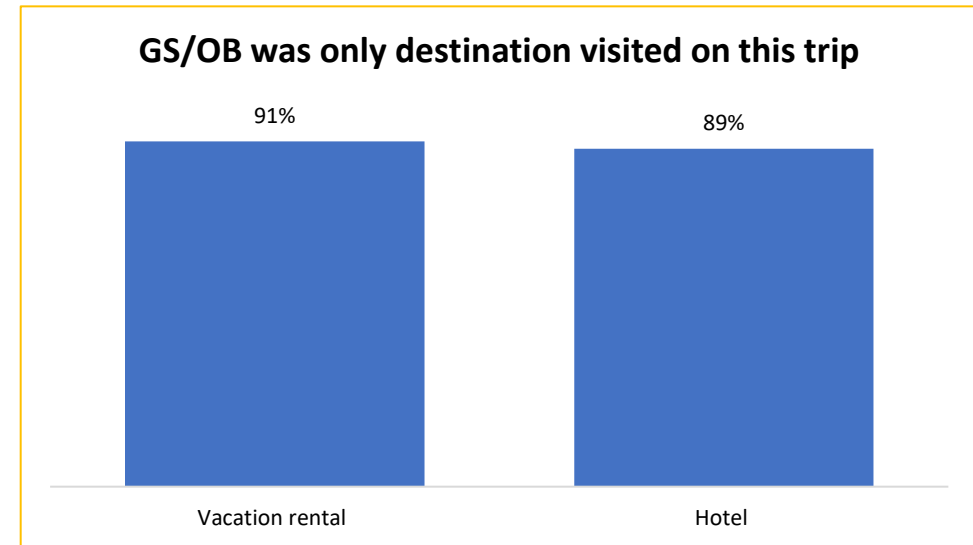
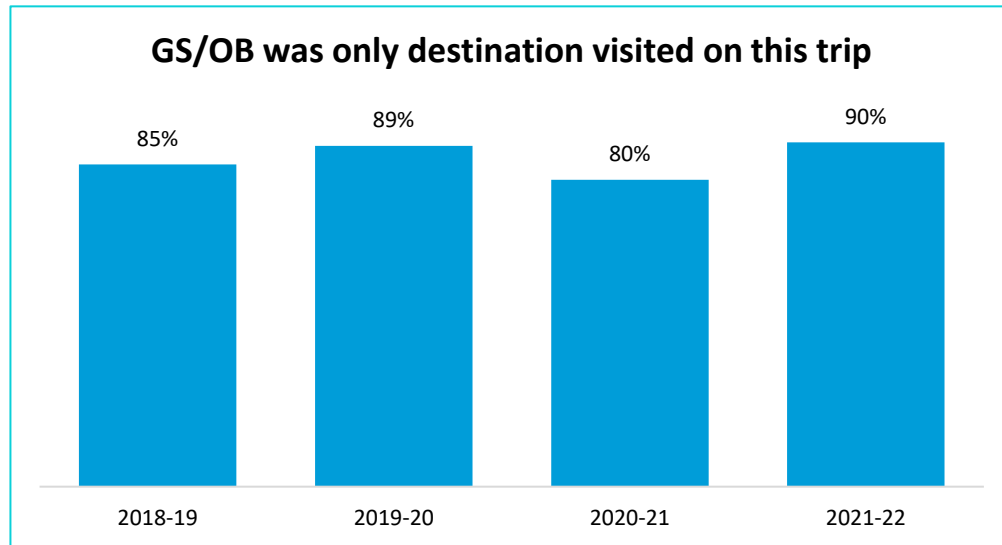
**Likelihood to Visit GS/OB in the Next Year**



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

# Destinations Visited

- More Winter visitors were focused on GS/OB as their only destination for this trip than in years past.



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



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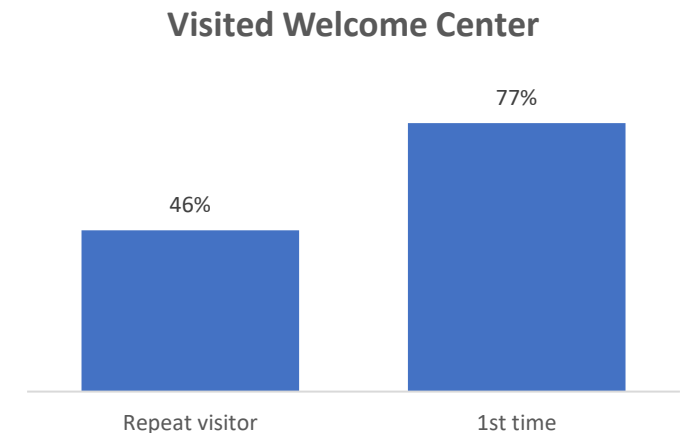
# Welcome Center Supplemental Analysis

Visitor Profile Research – Winter 2021-22

# Welcome Center Impact

- Over half (58%) of Winter GS/OB visitors visited the Welcome Center.
- We don't typically see length of stay impacted by Welcome Center visitation, since trip length is typically determined before a trip begins. So the longer stays among Welcome Center users are more likely the result of those spending more time in the destination exploring more.
- Welcome Center visitors do engage in more activities and attractions on their trips.
- Repeat visitors are less likely than new ones to make use of the Welcome Center.

Winter 2021-22 visits	No Welcome Center	Visited Welcome Center
Length of stay	3.7	4.0
# of activities on trip	5.1	10.0



# Impact on Spending

- Consistent with more activities, Welcome Center visitors outspend non-visitors.
- Again, the Welcome Center probably does not generate all of this additional spending, although it may drive up spending on shopping and recreation by pointing people to things to do that interest them.
- Welcome Center visitors tend to be first-time visitors, and therefore more prone to exploring the destination, doing more and spending more.

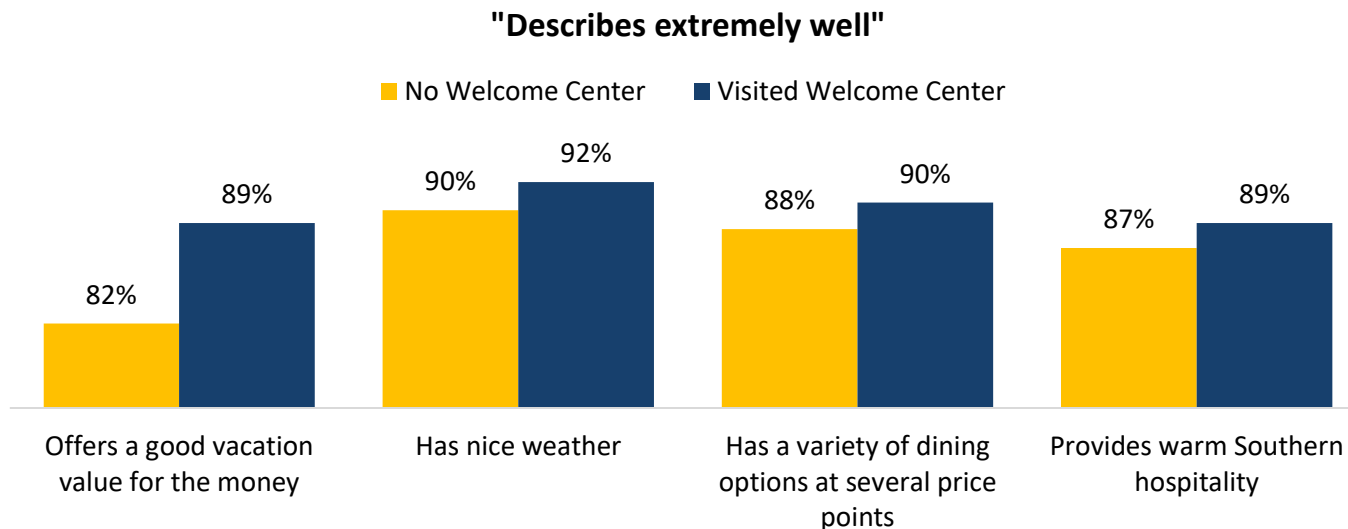
Trip spending	No Welcome Center	Visited Welcome Center
Lodging	\$648	\$697
Meals/food/groceries	\$236	\$362
Shopping	\$164	\$523
Recreation or entertainment	\$85	\$317
Transportation within Gulf Shores	\$35	\$159
Other	\$33	\$70
<b>Total</b>	<b>\$1,201</b>	<b>\$2,128</b>

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

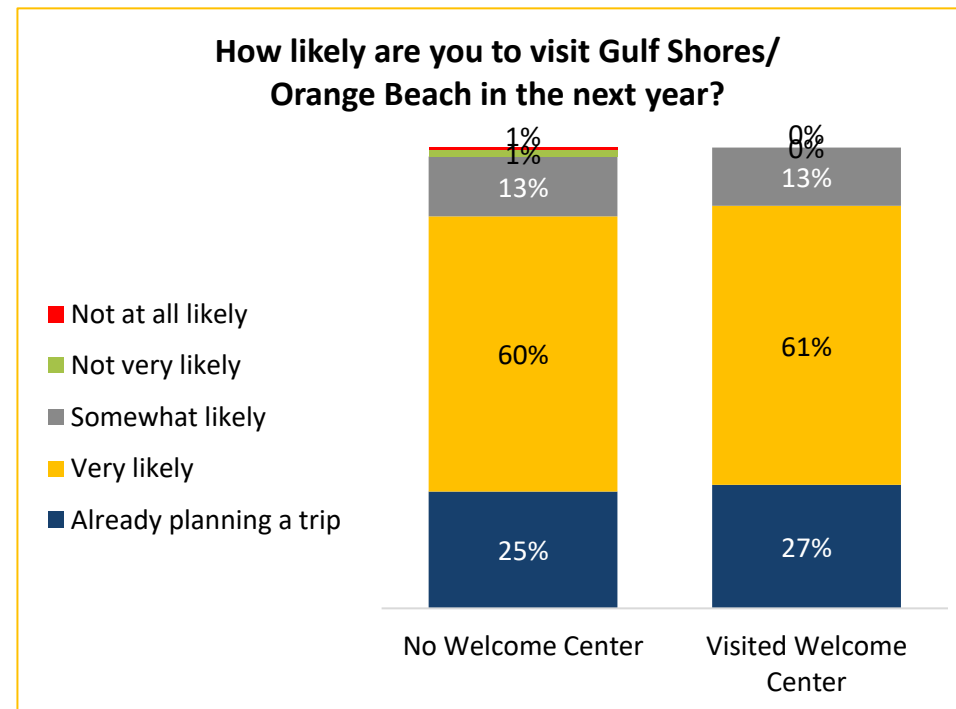
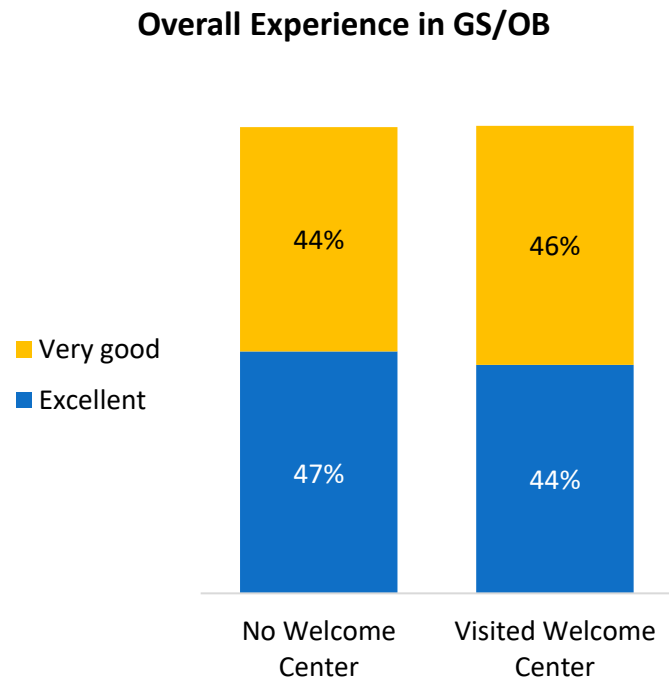
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- Welcome Center visitors have more positive views of the destination's value, weather, dining options, and hospitality.
- Among first-time visitors, 39% of those who did *not* visit the Welcome Center agreed the GS/OB “offers plenty to see and do” while 55% of those who *did* visit the Welcome Center agreed with the statement. This illustrates that the Welcome Center can help correct perceptions about what there is to see and do in the destination.



# Impact on Experience and Intent to Return

- There is little difference overall between those who used the Welcome Center and those who did not in terms of experience rating and likelihood to return. But that is again due to first-time visitors – only 68% of those who did not use the Welcome Center are already planning or very likely to return, versus 79% of those who did use the Welcome Center.





# Appendix

Visitor Profile Research – Winter 2021-22



# Comparing Target to Other Travelers

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- Winter day-trip visitors have visited on average 2.7 times in the past year, down from 4.0 visits in the prior Winter. We saw a similar decline in frequency among Fall visitors. This is another impact of new visitors. Among repeat day visitors, visit frequency is twice that of visitors whose first trip to GS/OB occurred this Winter.
- GSOBT focuses analysis of non-target trips on day visits to the destination. These non-target day trips exclude local residents. Visitors from Pensacola are included.
- We also employed screening questions to ensure that day visitors are coming to Gulf Shores/Orange Beach for leisure, rather than for work.

Non-target WINTER Day trips	2019-20	2020-21	2021-22
Average # visits/year	4.6	4.0	2.7
First time trips	29%	34%	37%

2019-20 target n=125; 2020-21 n=142; 2021-22 n=122

# Comparing Target to Other Travelers

Began planning summer trip	2019-20		2020-21		2021-22	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
< 1 week before trip	8%	72%	12%	54%	7%	57% <sup>a</sup>
1-2 weeks	5%	6%	20%	29%	27%	25%
3 weeks - 1 month	13%	15%	26%	8%	24%	15%
2 - 3 months	40%	6%	18%	7%	34%	3%
4-6 months	14%	0%	9%	1%	8%	1%
6+ months	21%	0%	14%	1%	0%	0%

GS/OB is only destination visited on this trip	2019-20		2020-21		2021-22	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
	89%	98%	80%	77%	90%	92%

2019-20 target n=438, day trip n=125; 2020-21 target n=407; day trip n=142; 2021-22 target n=388 (a); day trip n=122 (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.  
 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	2019-20		2020-21		2021-22	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Family or friends	34%	56%	28%	23%	27%	26%
Social media	26%	7%	30%	27%	30%	21%
Gulf Shores & Orange Beach Tourism website	30%	7%	26%	26%	28%	15%
Hotel websites	14%	0%	23%	11%	22%	10%
Travel advice websites or apps	14%	1%	27%	7%	21%	9%
Traveler review sites or apps	22%	6%	22%	14%	29%	9%
Local vacation rental company sites	21%	0%	19%	4%	24%	8%
Magazine and newspaper articles	2%	1%	16%	8%	7%	8%
Vacation home rental booking sites/apps	50%	0%	35%	8%	42%	8%
Travel/visitor guide	7%	1%	13%	13%	9%	7%
Alabama's official tourism website	4%	5%	17%	8%	9%	7%
Booking websites or apps	23%	1%	17%	12%	22%	6%
Travel blogs	6%	1%	14%	8%	9%	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.

2019-20 target n=438, day trip n=125;  
2020-21 target n=407; day trip n=142;  
2021-22 target n=388 (a); day trip n=122 (b)

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

# Comparing Target to Other Travelers

Children on trip	2019-20		2020-21		2021-22	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
% of trips with children	45%	13%	46%	42%	47%	19%
Of trips with children: 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; 2021-22 target n= 144, day trip n=23						
< 6 years old	37%	17%	26%	27%	33%	22%
6-11 years old	55%	83%	29%	28%	46%	57%
12-17 years old	43%	9%	22%	20%	57%	57%

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	2019-20		2020-21		2021-22	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Automobile	83%	88%	92%	94%	85%	97%
Bus	14%	9%	2%	3%	0%	6%
Airplane	1%	2%	4%	1%	7%	2%
Other	1%	2%	2%	1%	7%	0%

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

2019-20 target n=438, day trip n=12  
 2020-21 target n=407; day trip n=14  
 2021-22 target n=388 (a); day trip n=122 (b)  
 a / b indicate statistically significant differences at the 95% level.

# Comparing Target to Other Travelers

	2019-20		2020-21		2021-22	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Travel party size	3.7	3.6	3.9	2.8	3.5	2.5

Trip spending	2019-20		2020-21		2021-22	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Lodging	\$1,022		\$903		\$670	
Meals/food/groceries	\$362	\$64	\$365	\$121	\$311	\$114
Shopping	\$279	\$71	\$293	\$162	\$290	\$157
Recreation or entertainment	\$157	\$41	\$178	\$82	\$148	\$72
Transportation in Gulf Shores	\$63	\$27	\$106	\$51	\$49	\$50
Other	\$39	\$6	\$64	\$72	\$44	\$24
TOTAL	\$1,921	\$209	\$1,910	\$488	\$1,512	\$418
Per person spending	\$517	\$58	\$489	\$175	\$438	\$169

2019-20 target n=438, day trip n=125  
 2020-21 target n=407; day trip n=142  
 2021-22 target n=388 (a); day trip n=122 (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		2019-20		2020-21		2021-22	
		Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Age	Average	42	44	43	47	42	47
Marital status	Married	76%	73%	79%	73%	80%	72%
	Divorced/Separated	6%	8%	8%	14%	6%	15%
	Widowed	1%	2%	2%	4%	2%	3%
	Single/Never married	17%	17%	11%	9%	12%	11%
HH income	Average	\$137,357	\$117,042	\$150,893	\$126,045	\$119,655	\$126,945

2019-20 target n=438, day trip n=125; 2020-21 target n=407; day trip n=142; 2021-22 target n=388 (a); day trip n=122 (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	2019-20		2020-21		2021-22	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Has warm weather	90%	89%	86%	88%	85%	95%
Is easy to get to by car	88%	84%	89%	88%	80%	95%
Has a "family-friendly" atmosphere	92%	91%	91%	86%	85%	93%
Has beautiful scenery	92%	91%	91%	89%	91%	91%
Has beautiful beaches	92%	96%	95%	89%	88%	91%
Offers plenty to see and do	94%	78%	88%	84%	85%	91%
Is a safe destination	91%	89%	96%	86%	88%	89%
Has a variety of dining options at several price points	91%	91%	92%	88%	87%	89%
Has a variety of lodging options at multiple price points	88%	84%	89%	86%	81%	89%
Has nice weather	91%	93%	92%	93%	87%	89%
Provides warm Southern hospitality	89%	84%	88%	82%	82%	89%
Offers a relaxing atmosphere	93%	89%	94%	86%	97%	85%
Offers a good vacation value for the money	86%	82%	86%	82%	84%	82%
Has a clean, unspoiled environment	88%	73%	88%	82%	81%	81%

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

2019-20 target n=438, day trip n=125  
 2020-21 target n=407; day trip n=142  
 2021-22 target n=388 (a); day trip n=122 (b)

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

# Comparing Target to Other Travelers

Overall experience	2019-20		2020-21		2021-22	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
<b>Top 2 Box Rating</b>	<b>97%</b>	<b>100%</b>	<b>88%</b>	<b>79%</b>	<b>92%</b>	<b>86%</b>
5 (Excellent)	63%	76%	48%	38%	44%	37%
4 (Very good)	34%	24%	40%	41%	48%	49%
3 (Good)	3%	0%	10%	19%	8%	11%
2 (Fair)	0%	0%	2%	1%	0%	2%
1 (Poor)	0%	0%	0%	1%	0%	0%

Likelihood to recommend	2019-20		2020-21		2021-22	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
<b>Top 2 Box Rating</b>	<b>92%</b>	<b>93%</b>	<b>97%</b>	<b>84%</b>	<b>93%</b>	<b>89%</b>
5 (Extremely likely)	70%	82%	68%	70%	41%	51%
4	22%	11%	29%	14%	52%	38%
3	6%	7%	2%	11%	7%	8%
2	1%	0%	0%	0%	0%	3%
1 (Not at all likely)	1%	0%	0%	5%	0%	0%

2019-20 target n=438, day trip n=125; 2020-21 target n=407; day trip n=142; 2021-22 target n=388 (a); day trip n=122 (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	2019-20		2020-21		2021-22	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
<b>Likely to return (top 2 box)</b>	<b>84%</b>	<b>89%</b>	<b>90%</b>	<b>82%</b>	<b>84%</b>	<b>40%</b>
5 (Already planning a trip)	30%	24%	31%	29%	14%	3%
4 (Very likely)	55%	64%	60%	54%	69%	37%
3 (Somewhat likely)	13%	11%	8%	13%	16%	42%
2 (Not very likely)	2%	0%	1%	2%	0%	12%
1 (Not at all likely)	1%	0%	1%	4%	0%	9%

During which season(s) would you be most likely to visit (of those likely to visit)	2019-20		2020-21		2021-22	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Spring	45%	69%	43%	45%	27%	59%
Summer	51%	69%	61%	75%	63%	64%
Fall	40%	44%	32%	36%	32%	44%
Winter	35%	38%	26%	25%	60%	53%

2019-20 target n=438, day trip n=125; 2020-21 target n=407; day trip n=142; 2021-22 target n=388 (a); day trip n=122 (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	2019-20		2020-21		2021-22	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Alabama	42%	35%	29%	19%	33%	30%
Florida	11%	42%	29%	19%	5%	31%
Georgia	4%	4%	20%	18%	6%	8%
Illinois	2%	2%	-	-	4%	1%
Indiana	2%	-	-	-	3%	-
Louisiana	8%	-	2%	11%	7%	9%
Michigan	2%	-	-	-	2%	-
Mississippi	7%	6%	13%	7%	7%	3%
Missouri	2%	-	-	2%	6%	5%
Tennessee	4%	-	5%	8%	8%	1%
Texas	3%	-	-	-	5%	4%
Wisconsin	2%	2%	-	-	2%	-

2019-20 target n=438, day trip n=125; 2020-21 target n=407; day trip n=142; 2021-22 target n=388 (a); day trip n=122 (b)

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

# Comparing Non-Target Trips Year-Over-Year

General activities	2019-20		2020-21		2021-22	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Beaches	55%	25%	52%	30%	62%	30%
Bicycle riding	10%	1%	17%	10%	5%	9%
Birdwatching	4%	1%	10%	9%	13%	3%
Boating or sailing	5%	1%	12%	6%	11%	3%
Concerts and nightlife	8%	0%	18%	6%	9%	7%
Dining out	73%	31%	48%	30%	54%	43%
Dolphin tour	22%	0%	18%	2%	10%	3%
Exercise/Working out	9%	11%	12%	8%	18%	6%
Family/friends reunion	3%	0%	15%	11%	13%	8%
Festivals or special events (non-sports)	4%	0%	13%	4%	9%	4%
Fishing	13%	0%	19%	8%	18%	5%
Golfing	4%	1%	10%	7%	10%	1%
Hiking on trails	12%	0%	13%	8%	12%	4%
Historical sites	4%	1%	17%	13%	15%	6%
Kayaking/Canoeing/Paddle boarding	7%	0%	10%	7%	6%	3%
Parasailing/Jet skiing	3%	0%	10%	7%	11%	2%
Photography	17%	0%	18%	16%	19%	10%
Relaxing	58%	13%	46%	24%	53%	32%
Scuba diving/Snorkeling	5%	0%	9%	3%	8%	3%
Shelling	12%	23%	25%	5%	26%	8%
Shopping	50%	23%	42%	28%	44%	30%
Sightseeing	35%	1%	28%	15%	39%	15%
Sporting events	8%	6%	10%	5%	5%	2%
Swimming	30%	5%	19%	13%	29%	11%
Tennis	2%	1%	11%	7%	3%	2%
Visiting a spa	7%	0%	13%	7%	8%	4%
Visiting friends/relatives who live in the area	12%	0%	17%	13%	20%	7%
Watching wildlife	10%	1%	19%	15%	22%	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 table.

2019-20 target n=438, day trip n=125;  
2020-21 target n=407; day trip n=142;  
2021-22 target n=388 (a); day trip n=122 (b)

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

# Comparing Non-Target Trips Year-Over-Year

Specific attractions	2019-20		2020-21		2021-22	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Adventure Island	11%	0%	9%	3%	19%	4%
Alabama Gulf Coast Zoo	4%	0%	16%	10%	16%	5%
Alabama's Coastal Connection Scenic Byway	9%	1%	12%	8%	15%	7%
Battleship USS Alabama	11%	6%	11%	4%	9%	6%
Bellingrath Gardens	4%	0%	9%	4%	10%	5%
Bon Secour National Wildlife Refuge	4%	0%	12%	7%	6%	3%
Dauphin Island					6%	4%
Civil War History Trail					5%	3%
Coastal Birding Trail	6%	0%	17%	6%	12%	10%
Fort Morgan Historic Site	5%	0%	16%	8%	13%	3%
Gulf State Park	15%	5%	23%	7%	24%	8%
Hugh S. Branyon Backcountry Trail	7%	0%	8%	3%	3%	6%
National Naval Aviation Museum	2%	0%	8%	4%	-	-
OWA Park	12%	27%	15%	4%	6%	8%
Tanger Outlets	28%	11%	19%	20%	25%	19%
The Track	4%	0%	6%	4%	8%	2%
The Wharf	28%	12%	28%	7%	11%	11%
Waterville	1%	0%	6%	4%	-	-

2019-20 target n=438, day trip n=125; 2020-21 target n=407; day trip n=142; 2021-22 target n=388 (a); day trip n=122 (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.