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

# Visitor Profile Research

Summer 2022

Strategic Marketing & Research Insights LLC

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

# Introduction

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# Background

- Gulf Shores & Orange Beach Tourism (GSOBT) is responsible for marketing the Alabama Gulf Coast as a year-round destination, while stewarding a thoughtful, sustainable level of growth. In support of this mission, GSOBT has conducted quarterly visitor profile research for nearly 20 years. To attract and manage additional visitation to the area, it is critical to first have a thorough understanding of the current situation, and visitor profiling is a vital way to gain that understanding.
- GSOBT began partnering with Strategic Marketing & Research Insights (SMARInsights) to gather information from 2017 and 2018 visitors to better understand the visitor experience, existing image of the area, demography and geographic origins of visitors by season. This report is the second of four seasonal reports covering 2022.
- As of summer 2022, with COVID-19 vaccines widely available and case counts at manageable levels in most places, travel readiness had returned almost to pre-pandemic levels. Now, however, many destinations face workforce shortages. Further complicating the travel landscape are fluctuating gas prices, air travel delays and cancellations, and a rapidly changing economy.
- 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.
- The data reported here is the result of surveying in markets indicated by Arrivalist and Key Data. The origin markets reflect a much broader array of origin markets, similar to what we typically saw pre-pandemic. For the past 2 summers, travelers have been more cautious and have stayed closer to home. Summer 2022 shows consumers venturing farther afield.

# Research Objectives


Gather information on summer visitors, determining visitor origins and demographics


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


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


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


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


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


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

# Methodology

- This report presents information collected through online surveys of visitors to Gulf Shores, Orange Beach or Fort Morgan during summer 2022 (June through August).
- Potential respondents were screened to ensure they were travelers to the Gulf Shores/Orange Beach area and were at least 25 years of age.
- Travelers were asked about multiple trips.
- Target data is weighted to match the destination's actual occupancy rates (hotel and vacation rental) over the relevant time period, which in summer 2022 was 84% condo/vacation rentals and 16% hotel stays.
- Surveys were conducted in the markets which Arrivalist's mobile data indicated were home markets for devices that spent time in the Gulf Shores/Orange Beach area during the summer months.
- Comparisons to 2019 data are included where relevant.

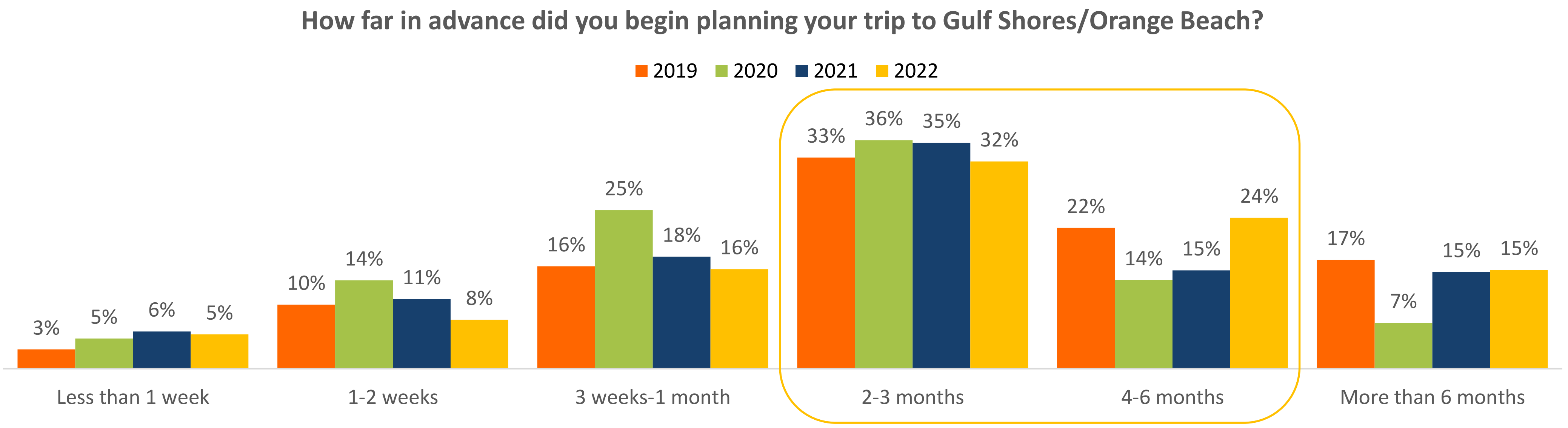
| Number of trips represented in the data | Summer 2022 |
|---|---|
| Target trips (stayed 1-30 nights in paid accommodations) | 417 |
| Non-target trips (visited but did not stay overnight) | 58 |

# Detailed Findings

Visitor Profile Research – Summer 2022

# Travel Planning

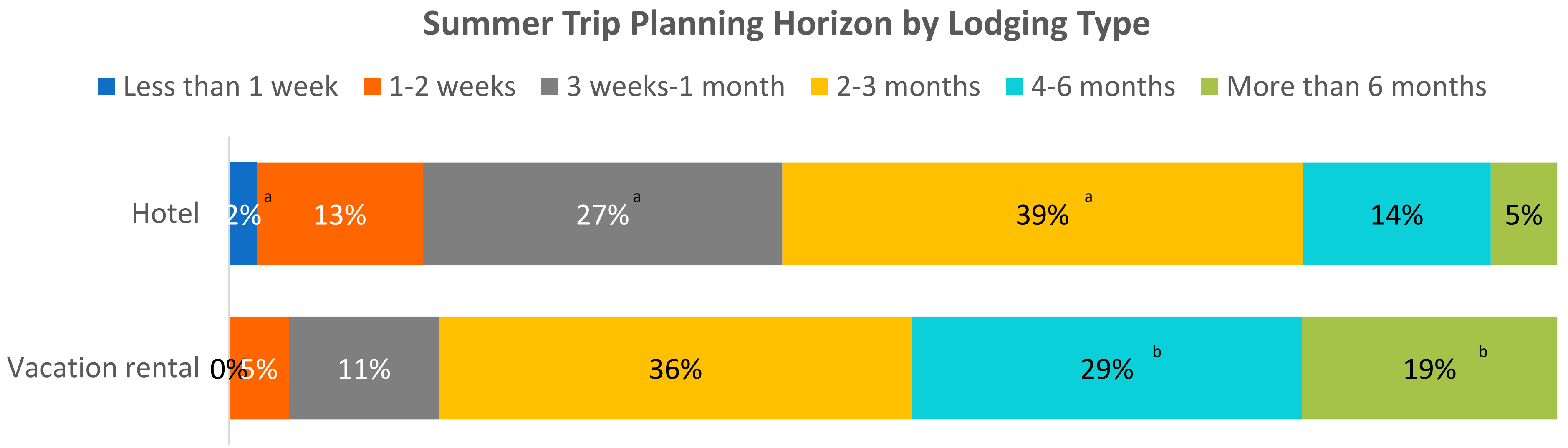
- More than half of the summer 2022 trips were planned between two and six months in advance of travel.
- This looks much more like 2019 trips than we have seen since the pandemic began. The travel planning horizon appears to be lengthening and returning to a pre-pandemic level.




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 – Hotel vs. Condo Rental

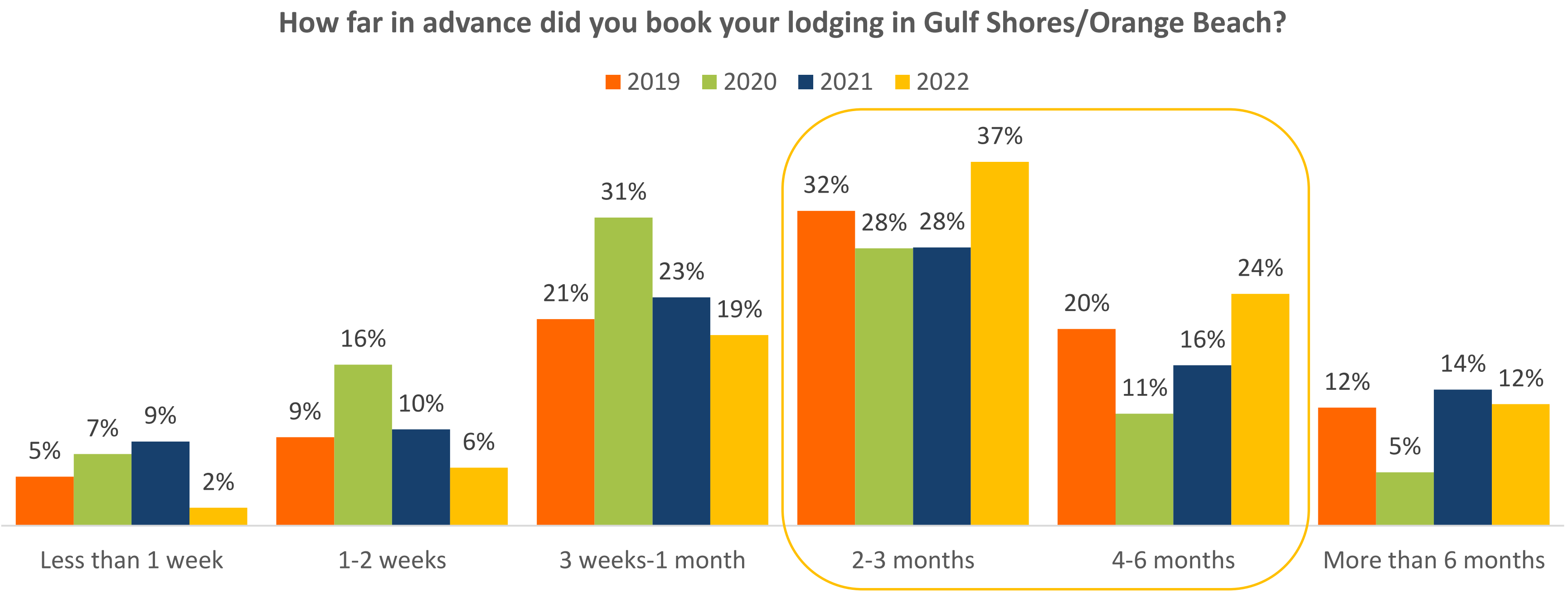
- Short-term planners are staying in GS/OB hotels for the most part, although even hotel trip planning times are lengthening. Pre-pandemic, 42% of hotel trips were planned in a month or less. In 2021 it was still over half (59%). This summer, we are back to 42% of hotel stayers planning GS/OB visits in a month or less.




Vacation rental/condo n=349 (a); Hotel/motel n=68 (b); a / b indicate statistically significant differences at the 95% level.
Question text: How far in advance did you begin planning your trip to Gulf Shores/Orange Beach? Response options as shown in graph above.

# Travel Planning – Lodging

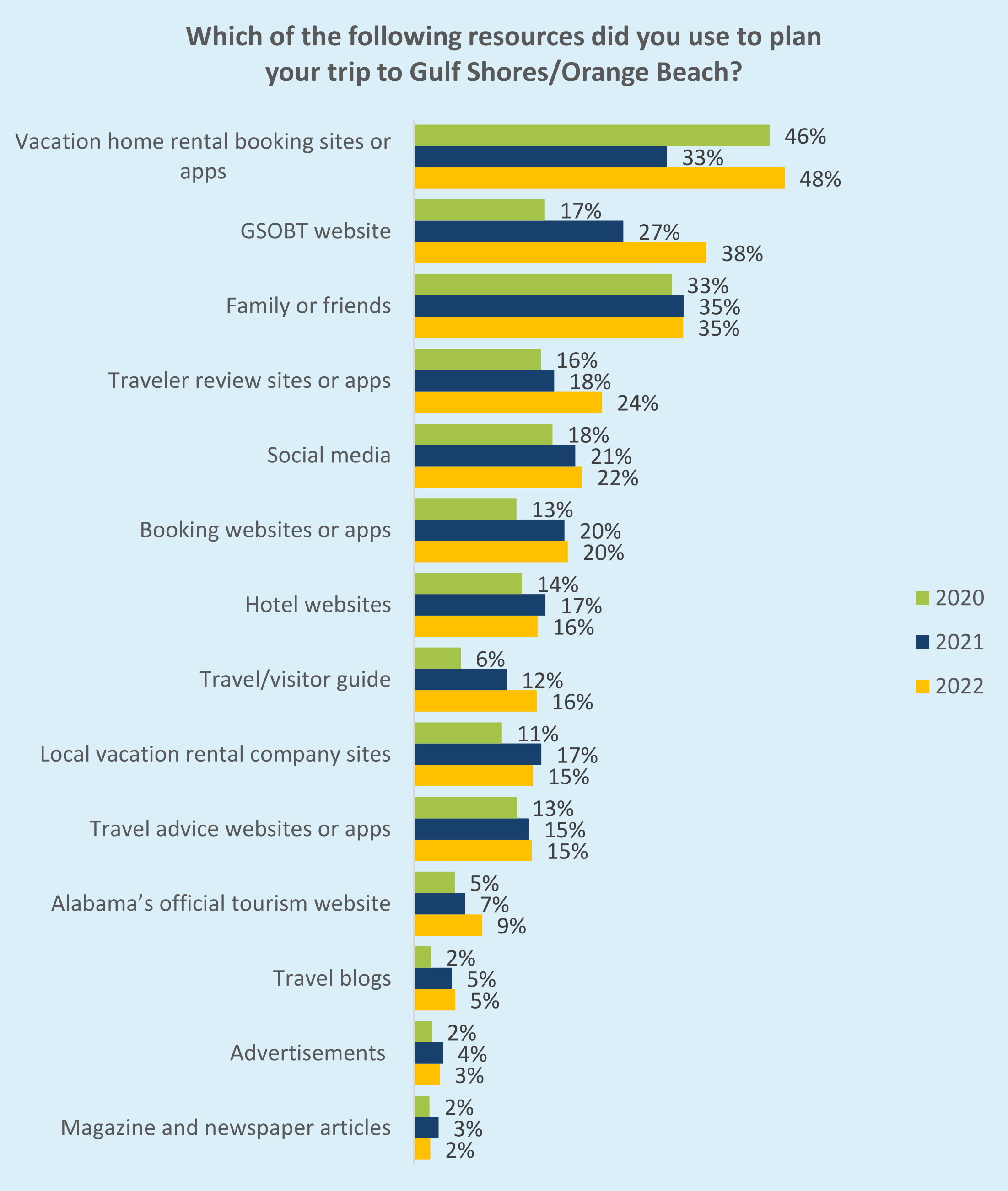
- As with trip planning overall, lodging bookings are returning to pre-pandemic timing. More than half of summer lodging was booked 2-6 months ahead of travel. This has implications for the timing of GSOBT's paid advertising.




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

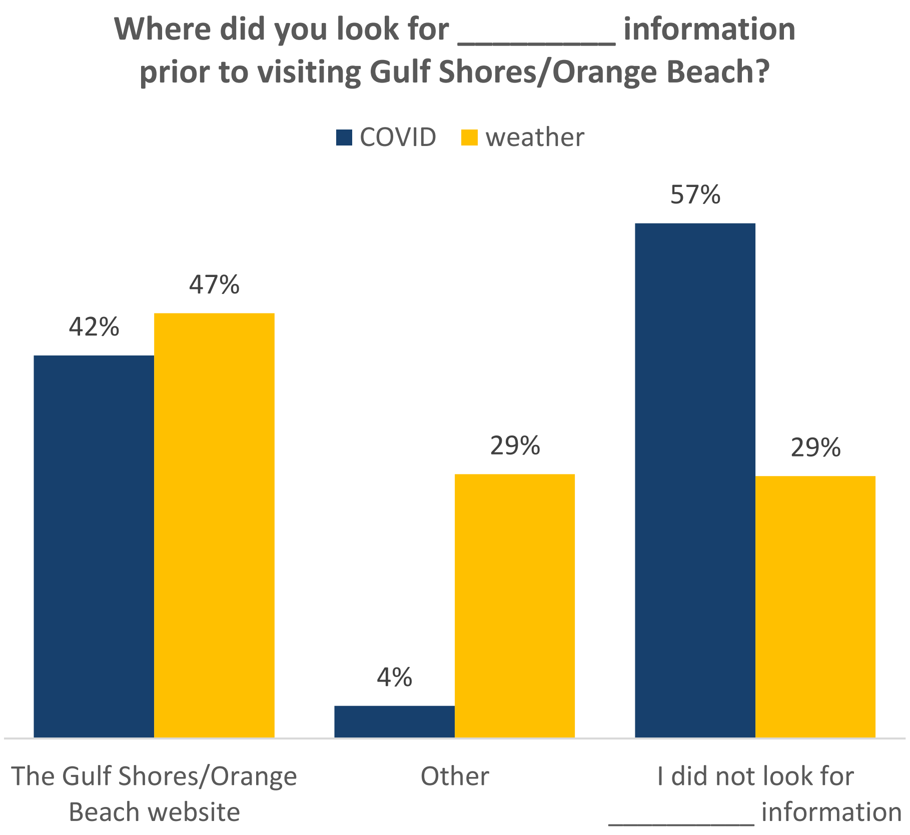
- Vacation home rental sites/apps and family and friends remain widely used summer trip planning resources.
- In summer 2022, however, the GSOBT website is the second most-used resource. There has been increasing usage over the years, building back up from 26% in 2019, surpassing it this year.




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.

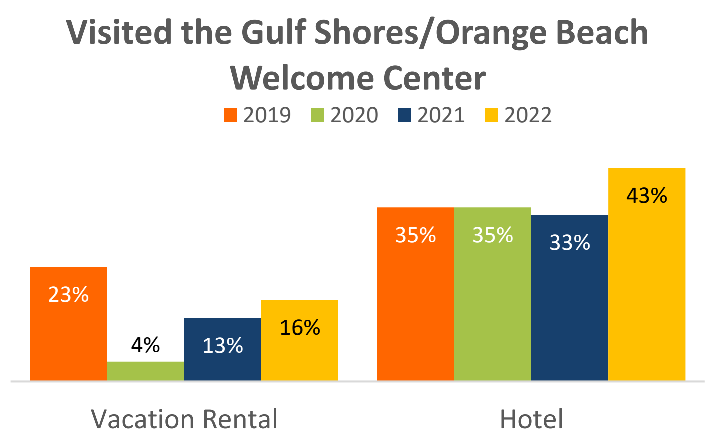
# Travel Planning – GSOBT Website

- GSOBT's website continues to serve an important role for visitors in preparing for their trips to the area.
- As travelers become more comfortable moving around in the era of COVID-19, fewer are looking for information on the disease prior to visiting GS/OB. Of those who did look, most relied on GSOBT's website.
- Nearly half of summer visitors looked up weather information on the GSOBT site. Other resources for this information are weather.com, weather apps, and the weather channel.

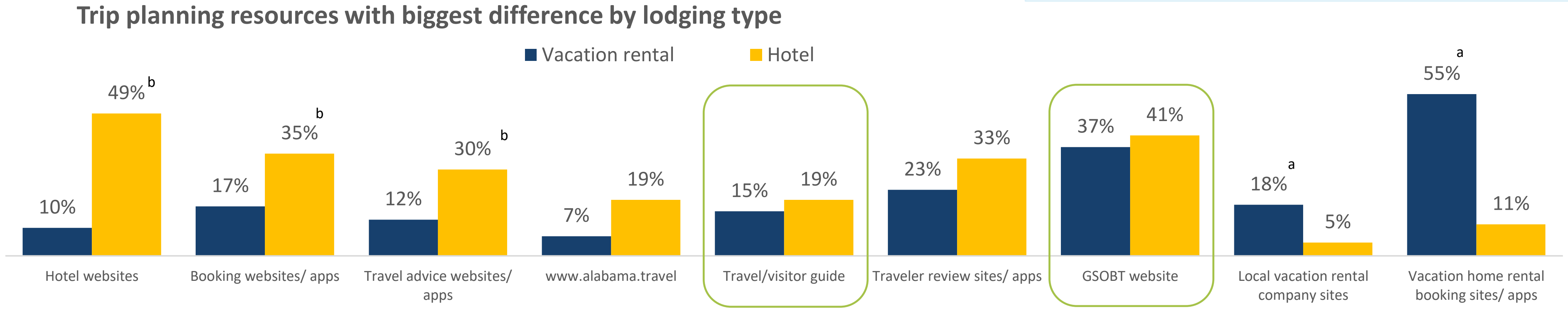


# Travel Planning – Hotel vs. Condo Rental

- GSOBT's owned media play a prominent role in visitor planning, with similar rates of usage across lodging types.
- Use of the Welcome Center is at its highest point among hotel stayers and continues to climb among vacation rental stayers, who tend to be more familiar and repeat visitors.




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

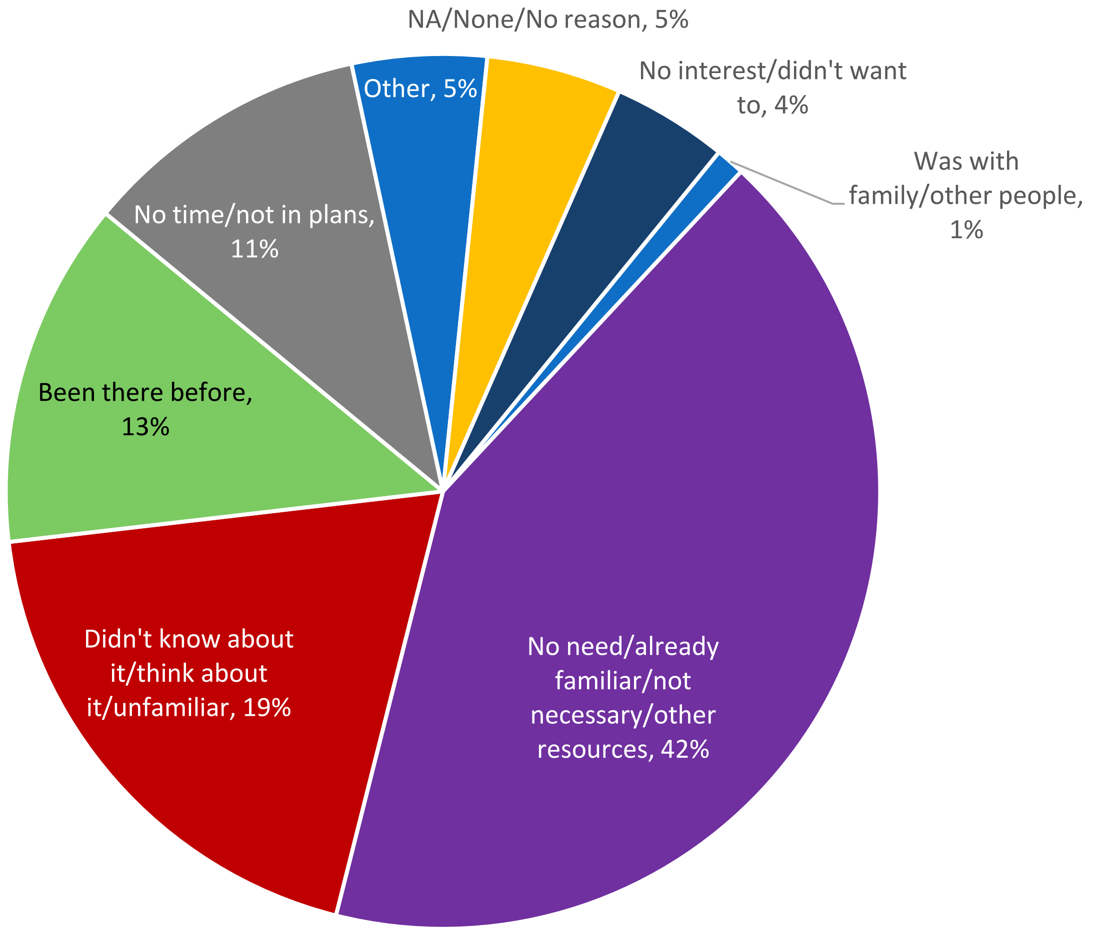



Vacation rental/condo n=34* (a); Hotel/motel n=68 (b); a / b indicate statistically significant differences at the 95% level.
Question text: Which of the following resources did you use to plan your trip to Gulf Shores/Orange Beach? ? Response options as shown in graph.

# Travel Planning

- Of those who did not visit a Welcome Center, the most common reason remains already being familiar with the destination.
- These reactions have remained consistent year over year.

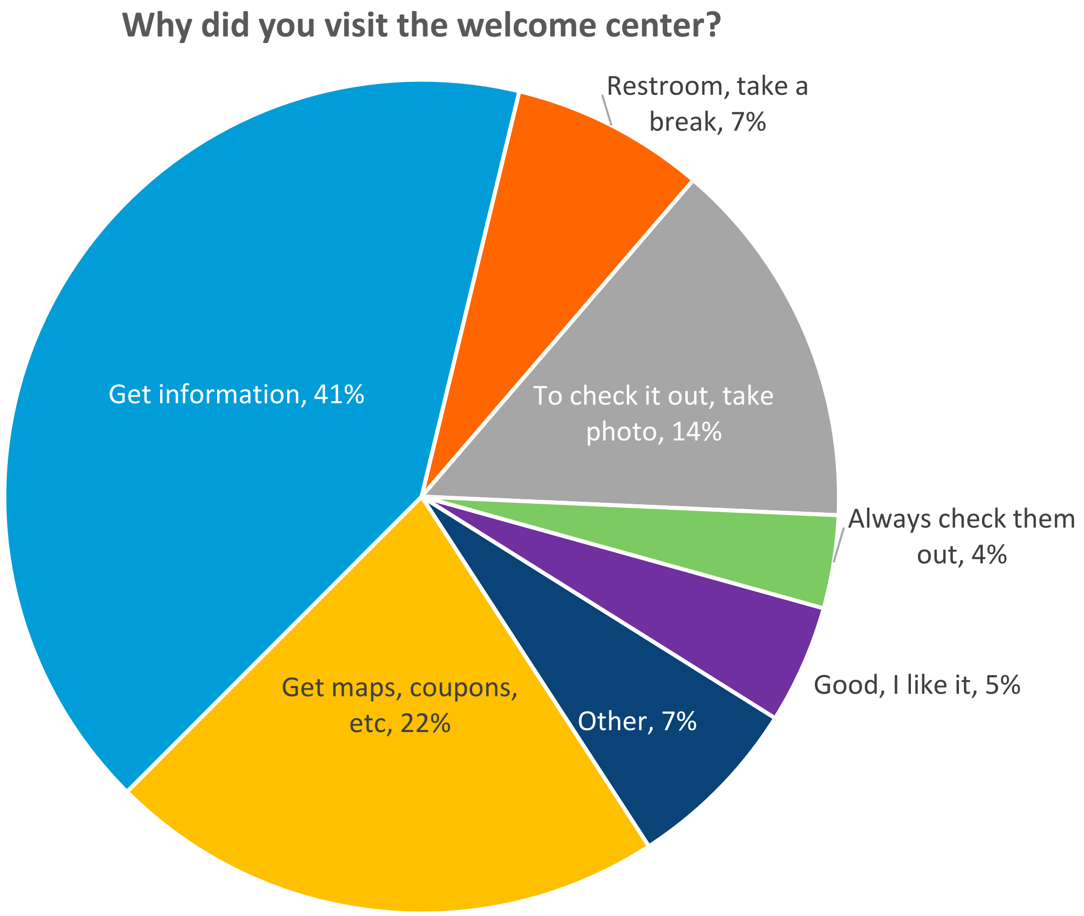
## Why didn't you visit the Welcome Center?




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

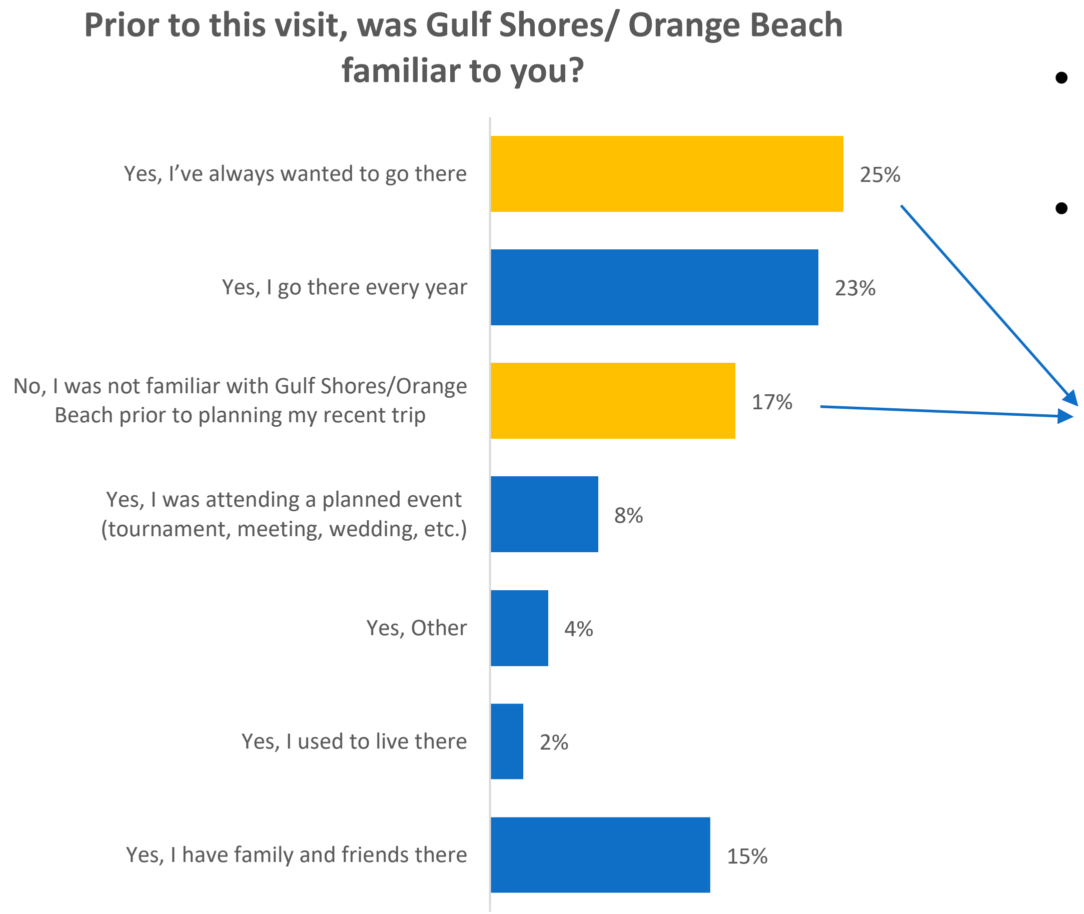
# Travel Planning – Welcome Center Visitors

- The main reason for stopping at a GSOBT Welcome Center continues to be to get information.
- This is consistent with less-familiar hotel stayers and first-time visitors using the Welcome Centers at a higher rate than condo-stayers.

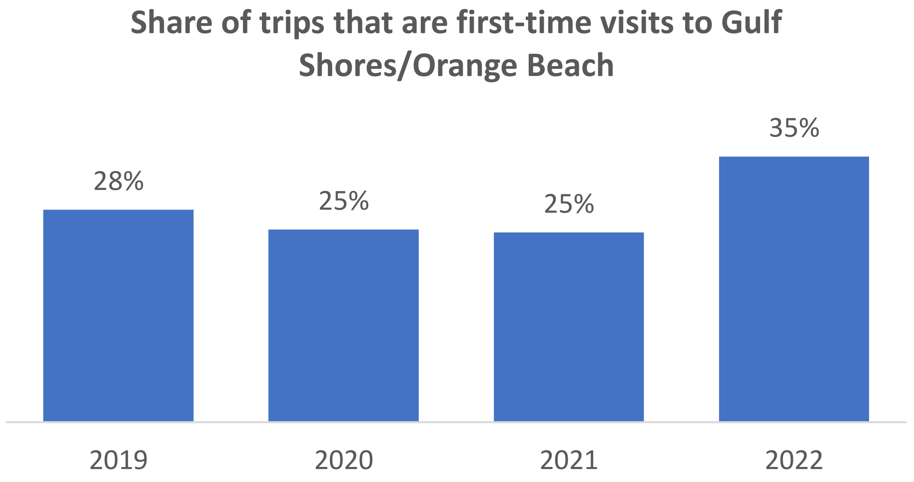



Question text: Why did you visit the welcome center? [Open ended response]

# Trip Characteristics



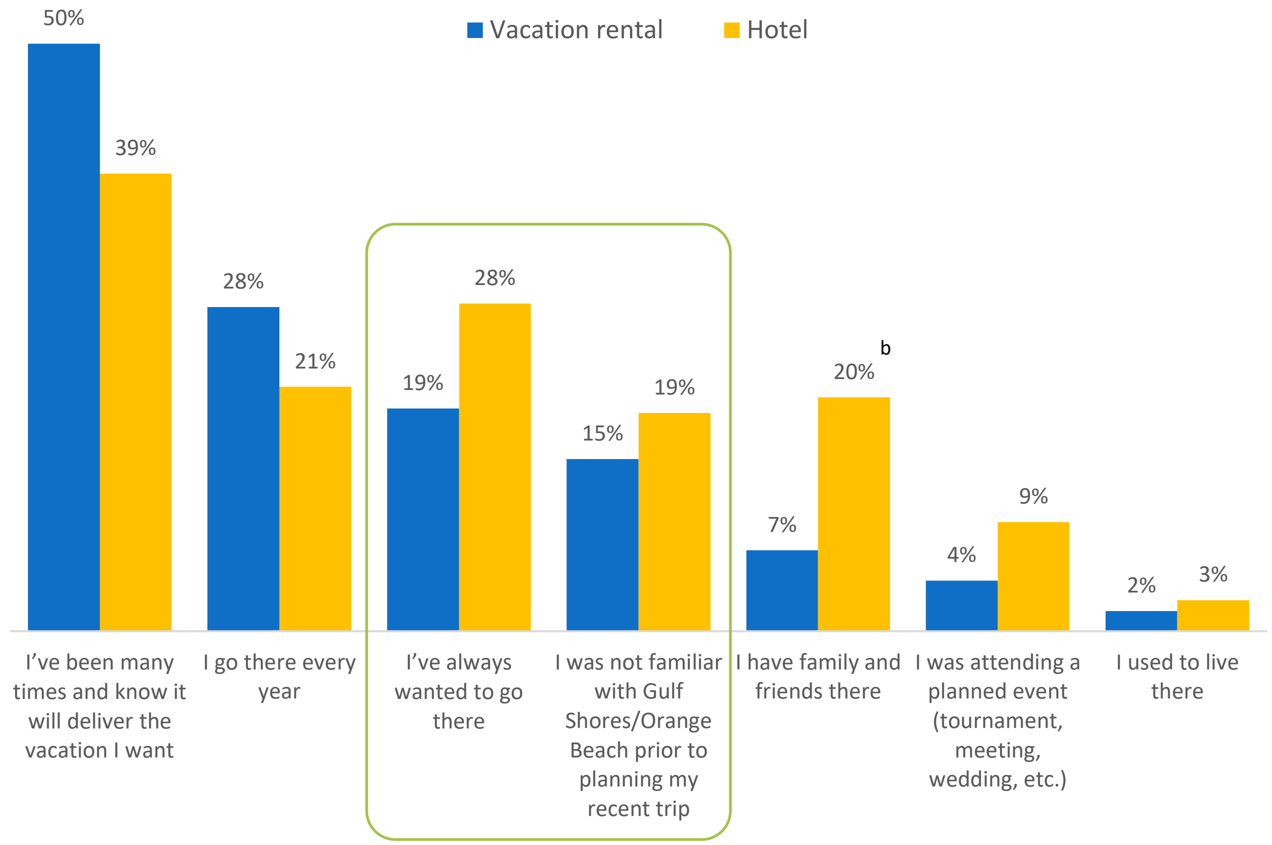

- The majority of visitors are repeat visitors who have been to GS/OB many times/every year.
- But summer 2019 saw a lift in first-time visitors. During the pandemic, a quarter of summer visitors had not been to GS/OB before. This year we see another increase in first-time visits.




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

Vacation renters are repeat visitors. Hotel stayers tend to be new visitors. This is consistent year to year.

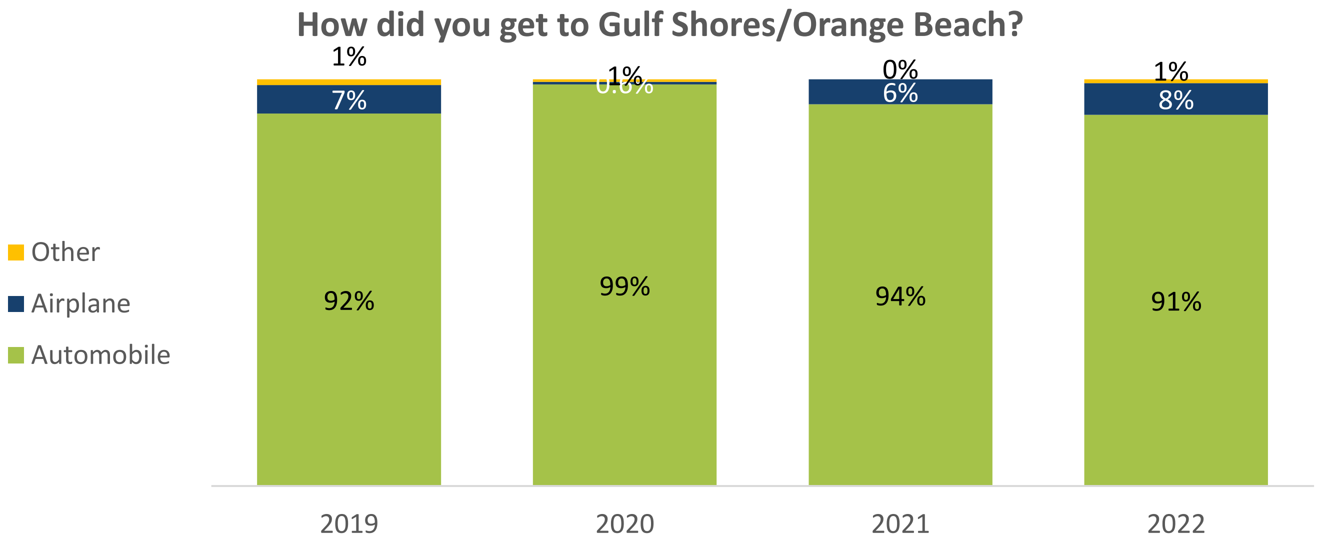
## Differences in Reasons for Familiarity




Vacation rental/condo n=349 (a); Hotel/motel n=68 (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

- The majority of GS/OB summer visitors drove to the destination, which is consistent with what we've seen in the past.
- Birmingham was the only airport mentioned.




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 continue to be the main summer visit activity. Participation is higher this year with most activities, signaling a return to exploratory behavior now that this feels safe again.
- Dining out, shopping, sightseeing, and Tanger Outlets have all seen a return to pre-pandemic levels.
- (The National Naval Aviation Museum remained closed as of summer.)

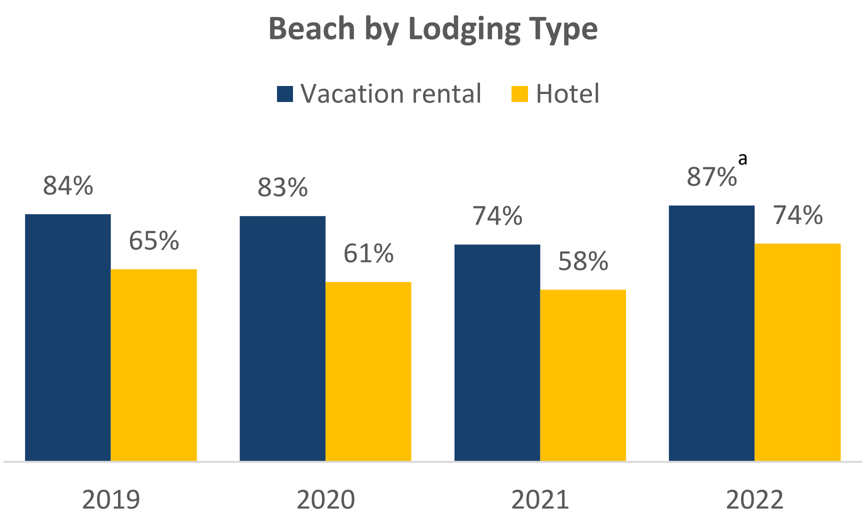
| Summer 2022 trip participation | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|
| Beaches | 81% | 80% | 71% | 85% |
| Dining out | 67% | 66% | 58% | 71% |
| Relaxing | 65% | 63% | 54% | 67% |
| Swimming | 58% | 64% | 52% | 62% |
| Shopping | 54% | 43% | 48% | 57% |
| Sightseeing | 37% | 21% | 23% | 36% |
| Tanger Outlets | 32% | 22% | 23% | 34% |
| Gulf State Park | 13% | 12% | 14% | 21% |
| The Wharf | 28% | 16% | 19% | 21% |
| Dolphin tour | 14% | 10% | 10% | 18% |
| Watching wildlife | 16% | 10% | 13% | 17% |
| Shelling | 19% | 15% | 18% | 16% |
| Dauphin Island | 13% | 8% | 11% | 16% |
| Fishing | 14% | 14% | 18% | 15% |
| Hiking on trails | 12% | 7% | 12% | 13% |
| Exercise/Working out | 15% | 10% | 10% | 12% |
| Photography | 12% | 7% | 13% | 12% |
| Fort Morgan Historic Site | 12% | 6% | 5% | 12% |
| Alabama's Coastal Connection | 14% | 8% | 12% | 10% |
| Visiting friends/family | 12% | 8% | 9% | 10% |
| Boating or sailing | 11% | 11% | 10% | 10% |
| Alabama Gulf Coast Zoo | 13% | 6% | 6% | 9% |
| Adventure Island | 15% | 3% | 9% | 9% |
| Battleship USS Alabama | 12% | 6% | 7% | 9% |
| Historical sites | 13% | 4% | 6% | 9% |
| Birdwatching | 9% | 3% | 4% | 8% |

| Cont'd. | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|
| Bicycle riding | 7% | 4% | 9% | 7% |
| Concerts and nightlife | 9% | 4% | 7% | 7% |
| Golfing | 10% | 3% | 7% | 7% |
| The Track | 12% | 8% | 7% | 6% |
| Family/friends reunion | 8% | 8% | 9% | 6% |
| Kayaking/Canoeing/Paddle boarding | 8% | 5% | 9% | 6% |
| Parasailing/Jet skiing | 6% | 5% | 4% | 5% |
| OWA Park | 4% | 4% | 7% | 5% |
| Waterville | 7% | 3% | 4% | 5% |
| Festivals or special events | 7% | 2% | 4% | 4% |
| Civil War History Trail | | | 2% | 4% |
| Scuba diving/Snorkeling | 5% | 4% | 5% | 3% |
| Bellingrath Gardens | 3% | 2% | 2% | 3% |
| Visiting a spa | 8% | 3% | 4% | 3% |
| Coastal Birding Trail | | | 4% | 2% |
| Bon Secour National Wildlife Refuge | 5% | 3% | 2% | 2% |
| Sporting events | 3% | 3% | 3% | 2% |
| Hugh S. Branyon Backcountry Trail | 3% | 1% | 3% | 2% |
| Tennis | 6% | 2% | 2% | 2% |
| National Naval Aviation Museum | 8% | 2% | 4% | |

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

- Vacation renters are more likely to feature beach visits in their trip.
- Beaches are also the leading motivator of visits from hotel stayers and were a feature of more hotel trips this year than ever before.

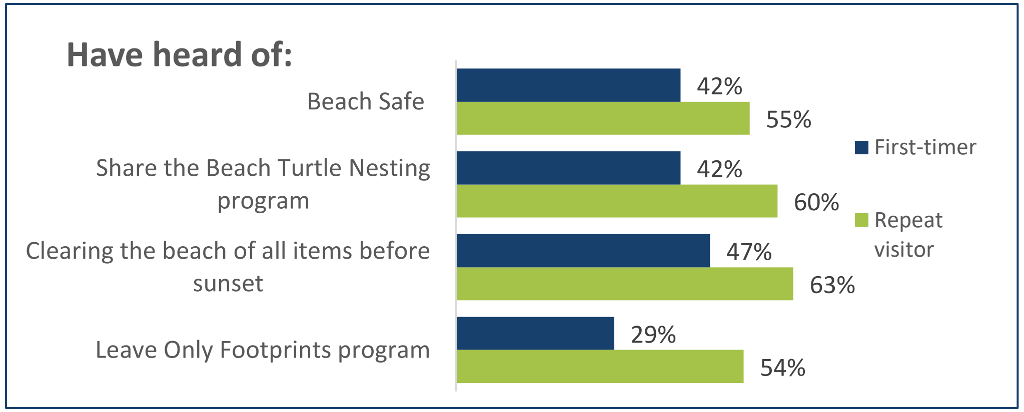



Question text: What attractions and activities did you visit or participate in while in Gulf Shores/Orange Beach on your trip? Response chosen: beach Condo/vacation rental n=349 (a); Hotel/motel n=68 (b)

# Trip Characteristics

- Visitors chose GS/OB for its beaches and to relax, swim, dine out, and shop. Summer visitors are looking for the great American beach vacation. As with activity participation, summer 2022 showed a resurgence of beaches, dining out, and shopping as trip motivators.
- The importance of area beaches reinforces the need to protect and preserve this important asset, as GSOBT has done with its Leave Only Footprints program and other initiatives.
- Repeat visitors remain more aware of these initiatives than new visitors, although more had heard of the programs this year than last.

| Summer trip motivators | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|
| Beaches | 73% | 71% | 62% | 76% |
| Relaxing | 40% | 40% | 36% | 39% |
| Swimming | 19% | 27% | 20% | 26% |
| Dining out | 31% | 17% | 19% | 27% |
| Shopping | 13% | 9% | 11% | 15% |
| Family/friends reunion | 5% | 5% | 6% | 5% |
| Fishing | 7% | 5% | 6% | 6% |
| Sightseeing | 11% | 2% | 5% | 10% |
| Shelling | 4% | 4% | 5% | 2% |
| Tanger Outlets | 12% | 8% | 4% | 7% |




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

# Trip Characteristics

- Summer trip spending remains high. Hotel ADR is down from summer 2021, although still above 2019. Hotel stayers' longer trips mean more spending. Vacation renters spent more on shopping and entertainment.

**ALL TARGET VISITORS**

| Average Travel Party Expenditures per Trip – SUMMER | 2019 | | 2020 | | 2021 | | 2022 | |
|---|---|---|---|---|---|---|---|---|
| | Spending | % of total | Spending | % of total | Spending | % of total | Spending | % of total |
| Lodging | $1,272 | 56% | $1,234 | 59% | $1,541 | 58% | $1,497 | 57% |
| Meals/food/ groceries | $415 | 18% | $397 | 19% | $620 | 23% | $502 | 19% |
| Shopping | $275 | 12% | $207 | 10% | $225 | 8% | $283 | 11% |
| Recreation or entertainment | $203 | 9% | $167 | 8% | $158 | 6% | $220 | 8% |
| Transportation within Gulf Shores | $58 | 3% | $48 | 2% | $68 | 3% | $61 | 2% |
| Other | $58 | 3% | $44 | 2% | $67 | 2% | $57 | 2% |
| **TOTAL** | **$2,280** | | **$2,097** | | **$2,679** | | **$2,619** | |

2019 n=500; 2020 n=401; 2021 n=350; 2022 n=417

**TARGET VISITORS BY LODGING TYPE**

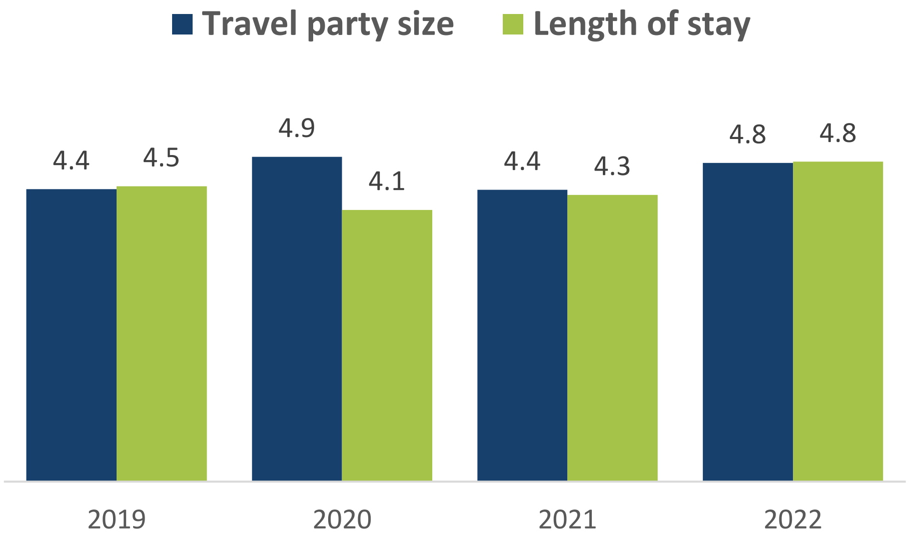
| Average Travel Party Expenditures per Trip – SUMMER | 2019 | | 2020 | | 2021 | | 2022 | |
|---|---|---|---|---|---|---|---|---|
| | Vacation rental | Hotel | Vacation rental | Hotel | Vacation rental | Hotel | Vacation rental | Hotel |
| Lodging | $1,429 | $519 | $1,363 | $504 | $1,751 | $583 | $1,652[a] | $674 |
| Meals/food/groceries | $441 | $290 | $422 | $258 | $690 | $301 | $535[a] | $327 |
| Shopping | $278 | $260 | $210 | $193 | $217 | $265 | $286 | $264 |
| Recreation or entertainment | $203 | $207 | $166 | $170 | $154 | $175 | $225 | $194 |
| Transportation within Gulf Shores | $53 | $85 | $38 | $104 | $62 | $92 | $56 | $86 |
| Other | $42 | $131 | $39 | $74 | $59 | $100 | $57 | $56 |
| **TOTAL** | **$2,445** | **$1,492** | **$2,237** | **$1,303** | **$2,933** | **$1,515** | **$2,811**[a] | **$1,600** |

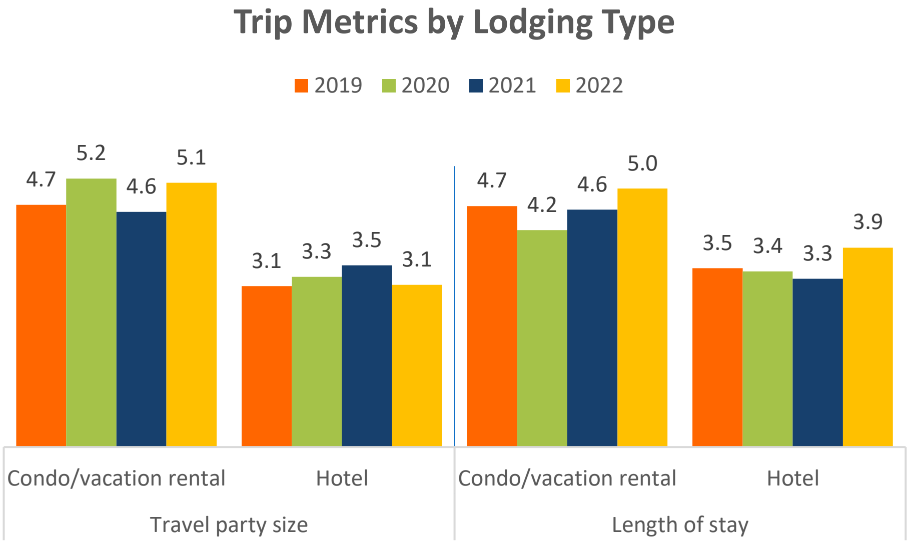
Condo/vacation rental 2019 n=200; 2020 n=188; 2021 n=141; 2022 n=349
Hotel/motel 2019 n=300; 2020 n=213; 2021 n=209; 2022 n=68

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

# Travel Party Characteristics

- Travel party sizes are robust, driven by vacation rentals.
- Length of stay is up from last year. We see the longest stays to date among vacation rentals and hotels.



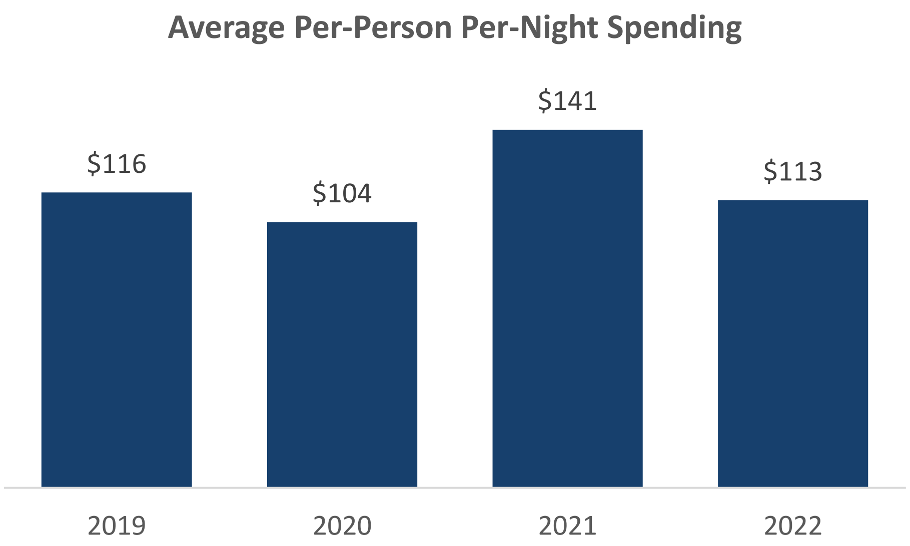

Question text: Including yourself, how many people were in your travel party? How many nights did you stay in Gulf Shores/Orange Beach during this trip? If you did not stay overnight, please enter '0'. Open-ended numeric responses.

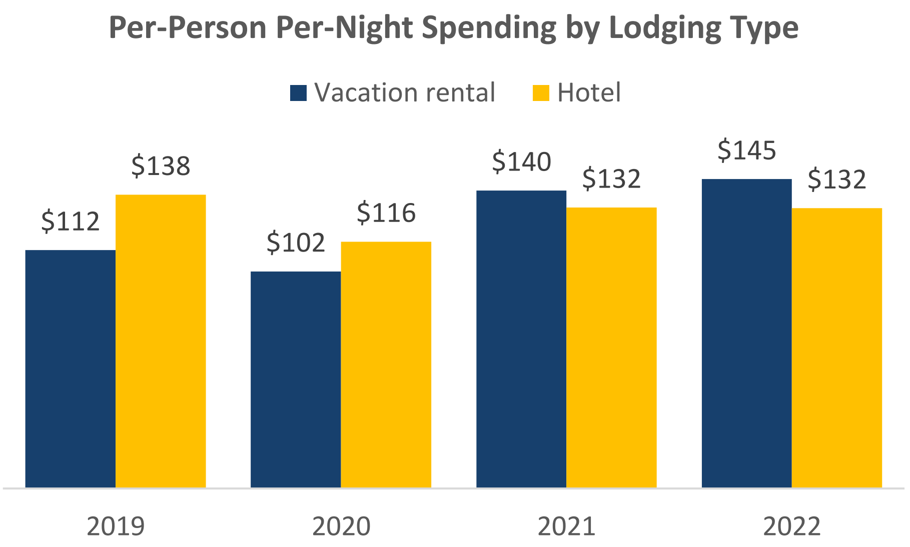
Condo/vacation rental 2019 n=200; 2020 n=188; 2021 n=141; 2022 n=349
Hotel/motel 2019 n=300; 2020 n=213; 2021 n=209; 2022 n=68

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

# Trip Characteristics

- Unit spending is in line with pre-pandemic spending overall. However, while hotel spending is in line with summer 2021 and is just below 2019, vacation rental spending is significantly higher. Longer stays and larger travel parties contribute to this.



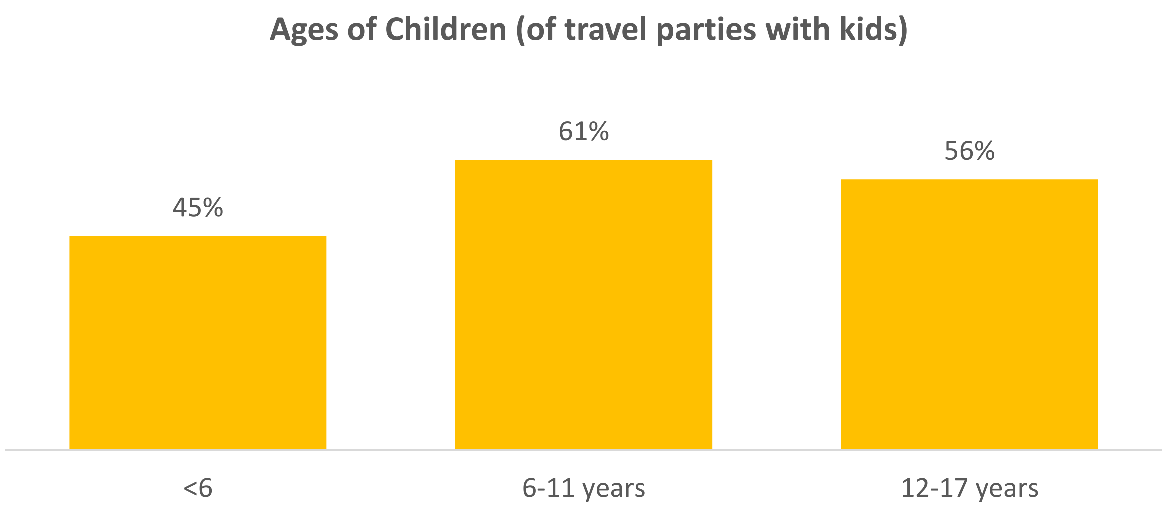




Question text: To help us better understand the economic impact of tourism, what was the approximate amount of money your travel party spent while in Gulf Shores/Orange Beach on your trip? [Category prompts] Including yourself, how many people were in your travel party? How many nights did you stay in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

Condo/vacation rental 2019 n=200; 2020 n=188; 2021 n=141; 2022 n=349
Hotel/motel 2019 n=300; 2020 n=213; 2021 n=209; 2022 n=68

# Travel Party Characteristics

- More than half (59%) of summer travel parties include children. This is up from 51% last year, but in line with the summer 2019 and 2020 results.
- Summer trips tend to include more school-age children, and this year is no exception.




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

# Travel Party Characteristics

- Visitor age and household incomes dipped from the norm in 2020, confirming anecdotal evidence of pandemic stimulus money from the government being used for vacation travel.
- In the past two years, visitor age and household incomes have returned to what we were accustomed to seeing.

| Year-over-Year Demographic Profile Summer visitors | | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|---|
| Age | Average | 46 | 42 | 46 | 47 |
| Marital status | Married | 67% | 70% | 66% | 69% |
| | Divorced/ Separated | 10% | 11% | 13% | 11% |
| | Single/ Never married | 20% | 17% | 18% | 17% |
| | Widowed | 3% | 2% | 4% | 4% |
| HH income | Average | $116,268 | $115,949 | $118,352 | $118,504 |

2019 n=507; 2020 n=401; 2021 n=350; 2022 n=417

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

- In terms of age, marital status, and income, summer 2022 visitors look much like those from 2019. This summer's visitors are less well educated and less ethnically diverse.
- While age dipped among both lodging types in 2020, household incomes have remained very consistent year over year among vacation renters. Summer 2020 hotel stayers, however, had significantly less income.

| Summer demographic profile by lodging type | | 2019 | | 2020 | | 2021 | | 2022 | |
|---|---|---|---|---|---|---|---|---|---|
| | | Vacation rental/condo | Hotel | Vacation rental/condo | Hotel | Vacation rental/condo | Hotel | Vacation rental/condo | Hotel |
| Age | Average | 47 | 44 | 42 | 42 | 46 | 46 | 49[a] | 45 |
| Marital status | Married | 74% | 63% | 75% | 69% | 68% | 66% | 74% | 64% |
| | Divorced/Separated | 10% | 12% | 8% | 11% | 12% | 13% | 11% | 10% |
| | Single/Never married | 15% | 22% | 15% | 16% | 20% | 16% | 11% | 22%[b] |
| | Widowed | 2% | 3% | 2% | 4% | 1% | 5% | 4% | 3% |
| HH income | Average | $124,220 | $111,074 | $125,893 | $105,762 | $127,149 | $124,846 | $124,949 | $113,804 |
| Education | College grad+ | 73% | 64% | 71% | 58% | 67% | 63% | 60% | 58% |
| Occupation | Executive/upper management | 16% | 21% | 13% | 20% | 17% | 21% | 10% | 19%[b] |
| | IT professional | 7% | 12% | 6% | 14% | 7% | 10% | 3% | 8% |
| | Educator | 12% | 9% | 15% | 5% | 12% | 8% | 11% | 9% |
| | Homemaker | 16% | 11% | 11% | 13% | 10% | 9% | 15% | 13% |
| | Student | 0% | 2% | 0% | 0% | 0% | 2% | 1% | 1% |
| | Small business owner | 3% | 5% | 4% | 4% | 3% | 3% | 6% | 4% |
| | Skilled trade/service | 10% | 8% | 11% | 13% | 15% | 10% | 6% | 12% |
| | Other | 18% | 14% | 28% | 18% | 21% | 22% | 20% | 18% |
| | Retired | 16% | 13% | 5% | 4% | 10% | 9% | 16%[a] | 8% |
| | Not currently employed | 2% | 6% | 8% | 11% | 6% | 5% | 2% | 1% |
| Ethnicity | Caucasian/White | 89% | 79% | 98% | 92% | 87% | 77% | 92% | 87% |
| | African-American/Black | 5% | 10% | 1% | 4% | 7% | 16% | 3% | 9% [b] |
| | Latino/Hispanic | 2% | 7% | 1% | 1% | 4% | 4% | 4% | 12%[a] |
| | Asian | 3% | 5% | 1% | 2% | 4% | 4% | 3% | 5% |
| | American Indian | 2% | 1% | 0% | 1% | 2% | 1% | 0% | 3% |
| | Other | 1% | 0% | 1% | 1% | 0% | 1% | 0% | 0% |

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

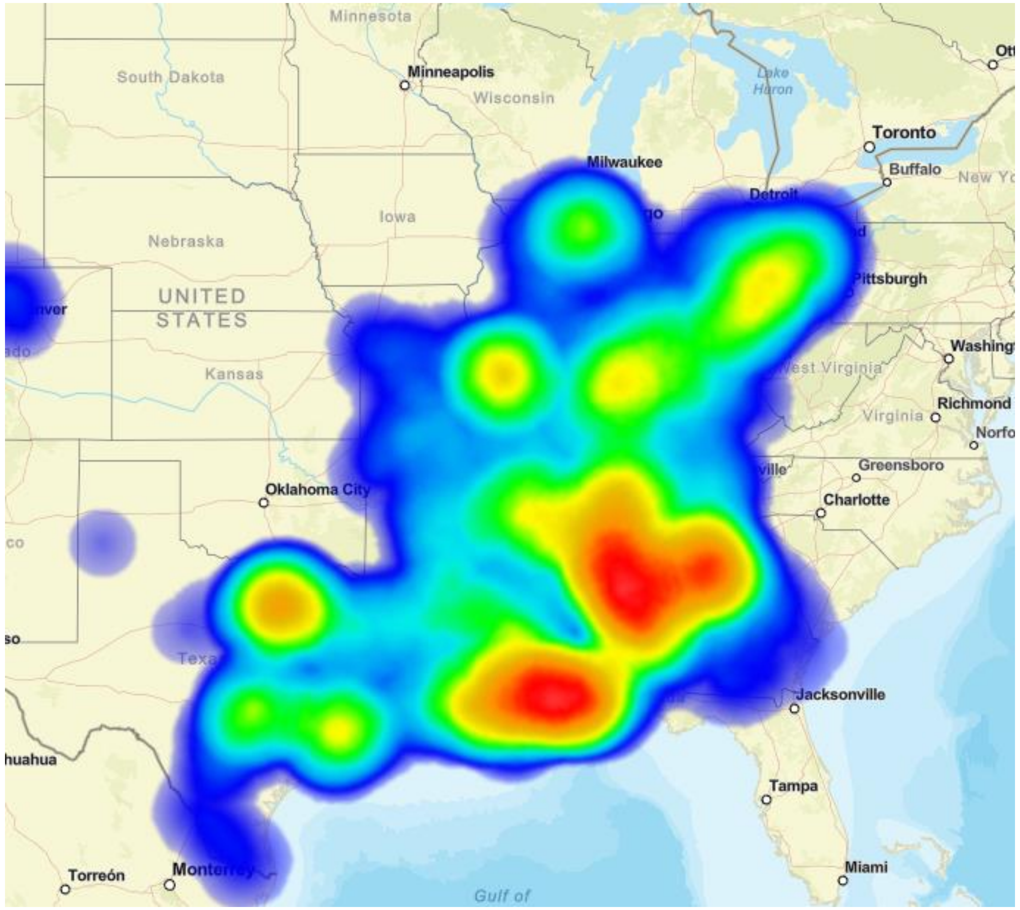
# Travel Party Characteristics

- Compared to new visitors, repeat visitors are generally older, more likely to be married, have higher incomes and are more educated.

| Summer demographic profile of new visitors | | Repeat visitors | | | New visitors | | |
|---|---|---|---|---|---|---|---|
| | | 2020 | 2021 | 2022 | 2020 | 2021 | 2022 |
| Age | Average | 43 | 46 | 48 | 42 | 46 | 44 |
| Marital status | Married | 71% | 68% | 70% | 65% | 54% | 66% |
| | Divorced/Separated | 12% | 13% | 10% | 8% | 13% | 12% |
| | Single/Never married | 16% | 16% | 16% | 23% | 28% | 20% |
| | Widowed | 1% | 3% | 4% | 4% | 4% | 3% |
| HH income | Average | $114,393 | $120,712 | $123,543 | $113,124 | $100,244 | $109,219 |
| Education | College grad+ | 62% | 64% | 61% | 58% | 59% | 53% |
| Occupation | Executive/upper management | 13% | 18% | 13% | 16% | 18% | 18% |
| | IT professional | 9% | 8% | 7% | 8% | 8% | 3% |
| | Educator | 9% | 11% | 9% | 6% | 10% | 12% |
| | Healthcare | | | 10% | | | 7% |
| | Homemaker | 13% | 9% | 14% | 8% | 6% | 13% |
| | Student | 0% | 1% | 1% | 0% | 6% | 1% |
| | Small business owner | 4% | 3% | 6% | 5% | 3% | 3% |
| | Skilled trade/service | 12% | 11% | 10% | 15% | 13% | 10% |
| | Other | 26% | 25% | 17% | 26% | 18% | 22% |
| | Retired | 5% | 11% | 12% | 5% | 12% | 10% |
| | Not currently employed | 10% | 5% | 2% | 9% | 8% | 1% |
| Ethnicity | Caucasian/White | 95% | 83% | 89% | 89% | 71% | 90% |
| | African-American/Black | 2% | 10% | 7% | 4% | 23% | 7% |
| | Latino/Hispanic | 1% | 4% | 7% | 5% | 4% | 11% |
| | Asian | 2% | 4% | 4% | 2% | 2% | 8% |
| | American Indian | 1% | 3% | 1% | 0% | 1% | 0% |
| | Other | 1% | 0% | 0% | 1% | 0% | 0% |

# Travel Party Characteristics

- Heat map showing source markets of summer visitors.

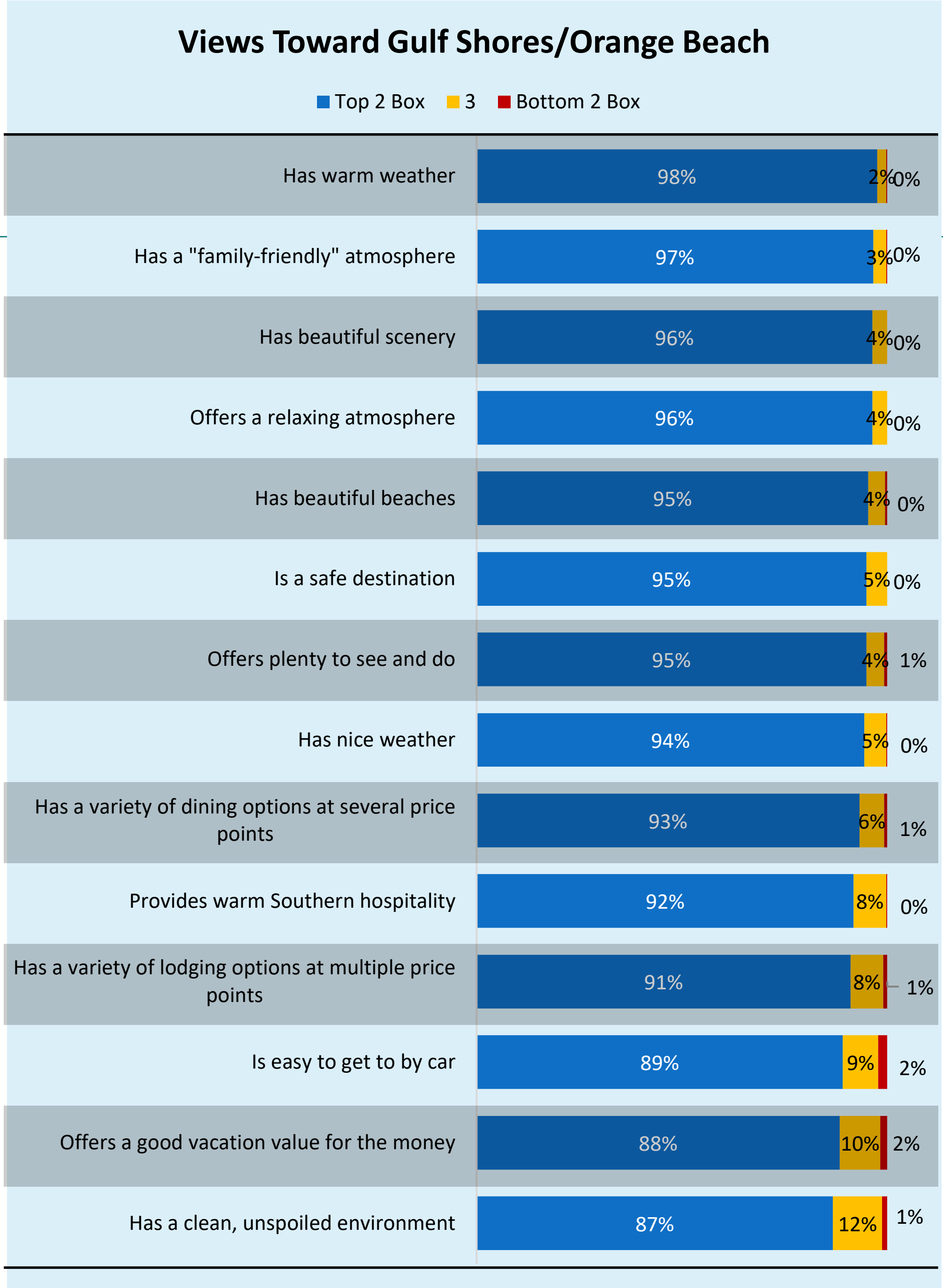



| | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|
| Alabama | 28% | 31% | 36% | 15% |
| Texas | 8% | 7% | 6% | 15% |
| Georgia | 5% | 5% | 5% | 10% |
| Tennessee | 7% | 7% | 6% | 9% |
| Louisiana | 12% | 15% | 12% | 8% |
| Mississippi | 9% | 11% | 11% | 8% |
| Missouri | 4% | 3% | 4% | 7% |
| Illinois | 3% | 0% | 2% | 5% |
| Arkansas | 4% | 4% | 4% | 4% |
| Florida | 5% | 5% | 3% | 0% |

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

# Views Toward GS/OB & Trip Satisfaction

- Ratings for nearly all image attributes are higher this summer than last, particularly for the weather, the atmosphere, and safety.
- The only attribute that has a lower rating this summer than last is “is easy to get to by car”. This may be related to construction or simply the volume of cars on the road this summer.

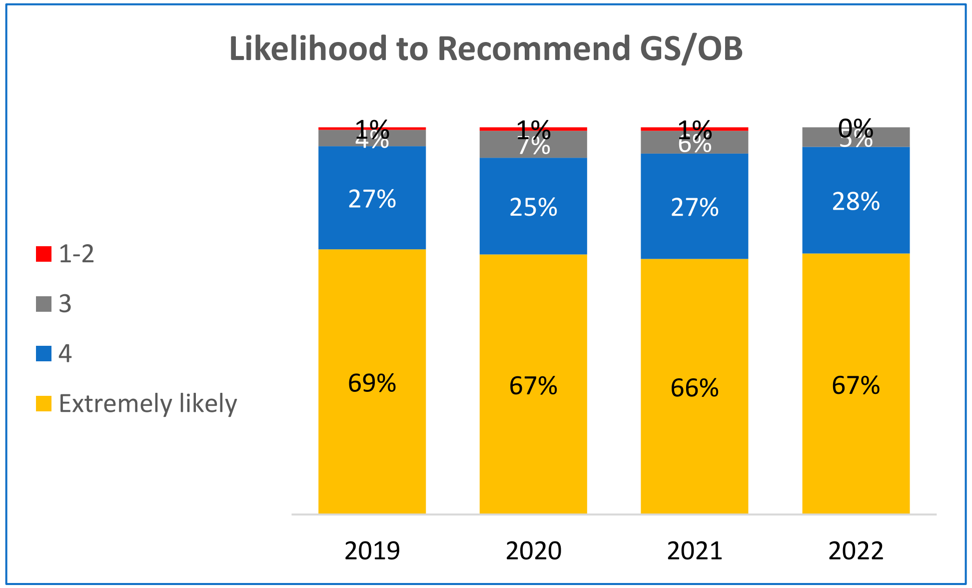



| Summer 2021 top 2 box |
| --- |
| 98% |
| 95% |
| 94% |
| 93% |
| 95% |
| 92% |
| 91% |
| 92% |
| 90% |
| 91% |
| 83% |
| 95% |
| 84% |
| 85% |

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

- In terms of likelihood to recommend Gulf Shores/Orange Beach, we see very little change year to year. Even with the pandemic and staffing challenges, visitors recognize the value of the vacation experience the destination provides.



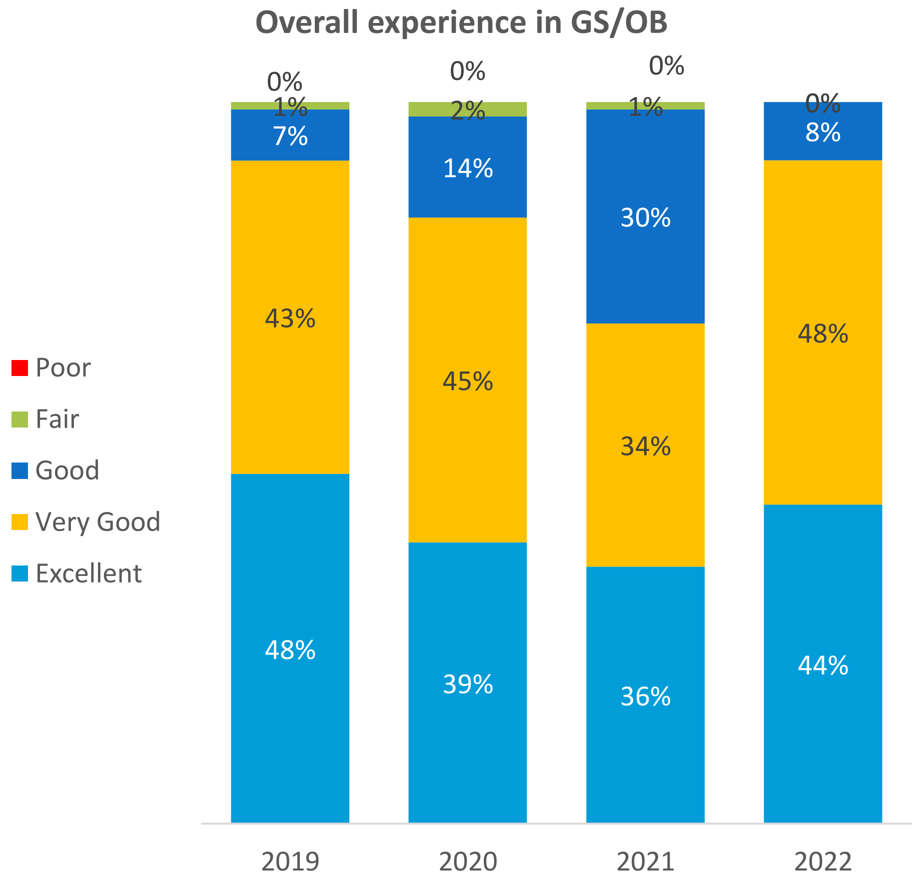

| **How likely are you to recommend Gulf Shores/Orange Beach to your friends or family as a destination to visit for a leisure trip?** Summer visitors; Top 2 Box % | **2019** | **2020** | **2021** | **2022** |
|---|---|---|---|---|
| Vacation rental/condo | 95% | 93% | 96% | 95% |
| Hotel | 95% | 91% | 92% | 95% |

Condo/vacation rental 2019 n=200; 2020 n=188; 2021 n=141; 2022 n=349
Hotel/motel 2019 n=300; 2020 n=213; 2021 n=209; 2022 n=68

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

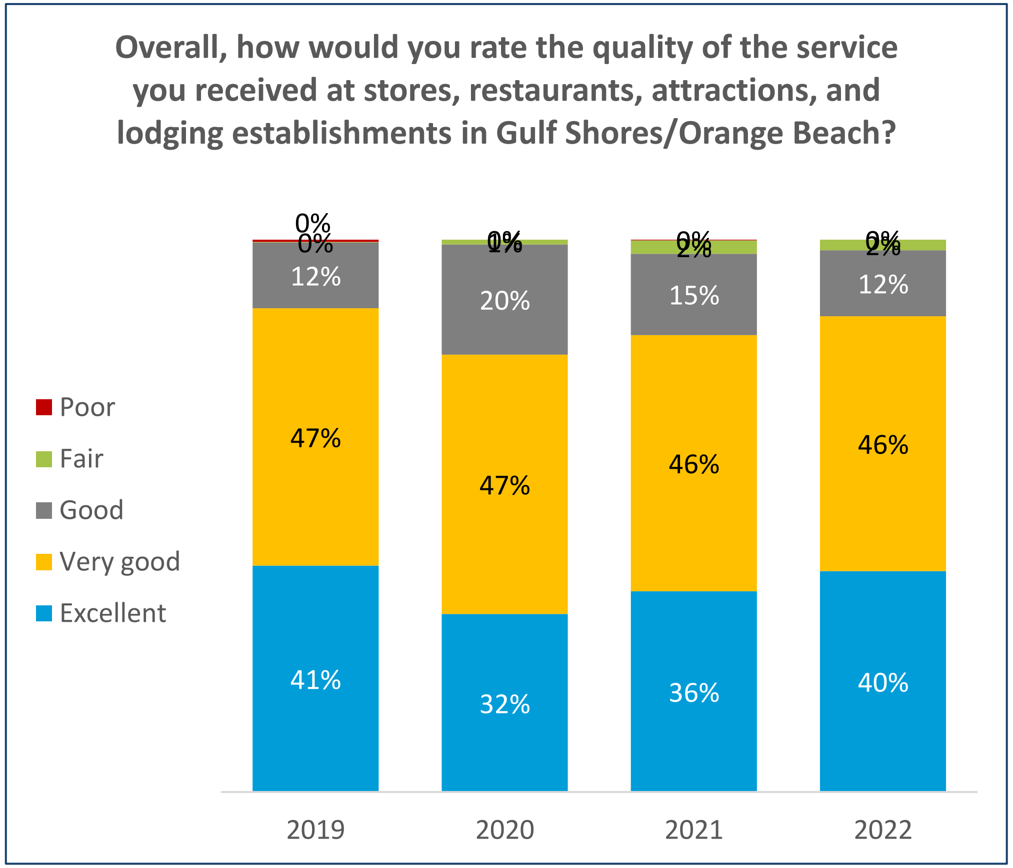
- Overall experience improved significantly this summer over the last two summers.
- While not quite as high as pre-pandemic, the share of visitors rating the experience “excellent” is higher than 2020 and 2021, and fewer than 10% rate it “good” or below.
- This is a very positive finding. It suggests that the destination has been able to leverage its leisure assets and has minimized the problems experienced by visitors in the past couple of summers due to staffing shortages.




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

# Views Toward GS/OB & Trip Satisfaction

- Service ratings are also significantly more positive this year than during the height of the pandemic, and resemble 2019 ratings.
- For the very few who rated the service “fair” or “good” (none said “poor”), general incivility and volume of visitors were the issue:
  - “People tend to be rude these days.”
  - “Long wait times.”
  - “It’s just not the same as it was pre-Covid. As I suspect most places are, unfortunately.”
  - “It was nice just real busy.”
  - “Availability of goods and friendliness of people”
  - “In the past years it was excellent. In 2021 and 2022, it wasn’t that great. The lines were long. The waiting to get into a restaurant was long. The food was mediocre and the service was way down”
  - “The service was good but not exceptional and did not have too many different options”

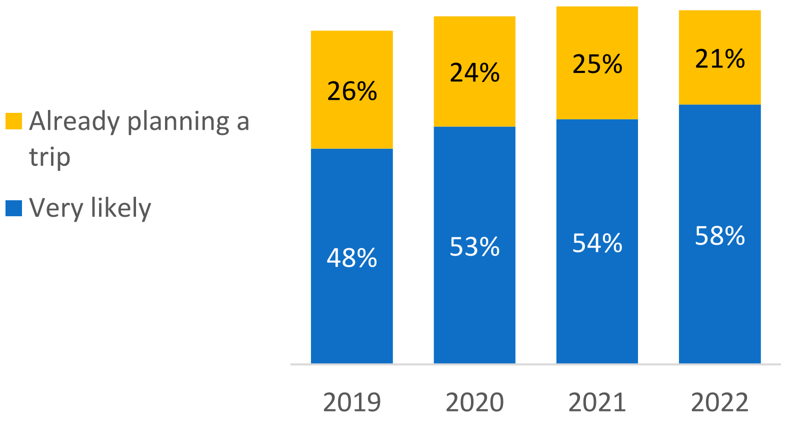



Question text: Overall, how would you rate the quality of the service you received at stores, restaurants, attractions, and lodging establishments in Gulf Shores/Orange Beach? Response options as shown in graph.

# Views Toward GS/OB & Trip Satisfaction

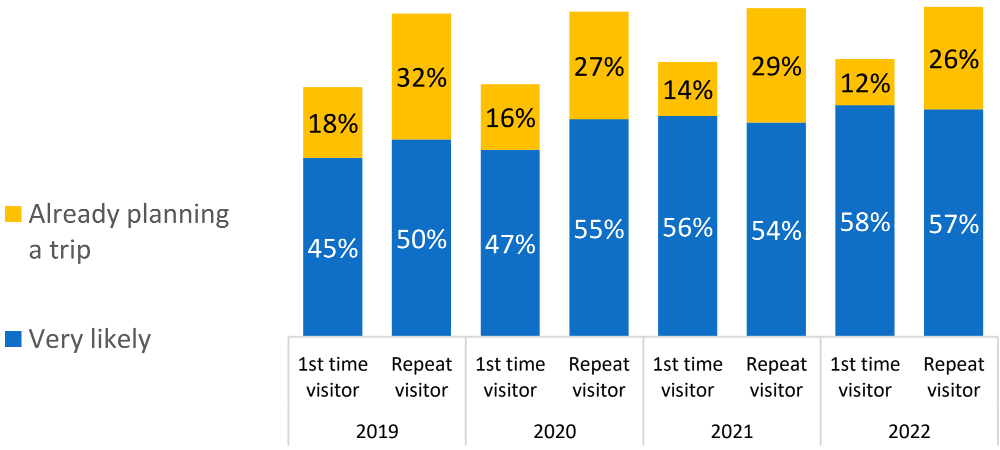
- Likelihood to return is even higher than it was pre-pandemic. With the influx of new visitors, and despite staffing and inventory shortages, GS/OB has generated loyal visitors among first-timers while continuing to earn the business of repeat visitors. This is an extremely positive result.

**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 | 53% |
| I go there every year | 39% |
| I've always wanted to go there | 20% |
| I have family and friends there | 11% |

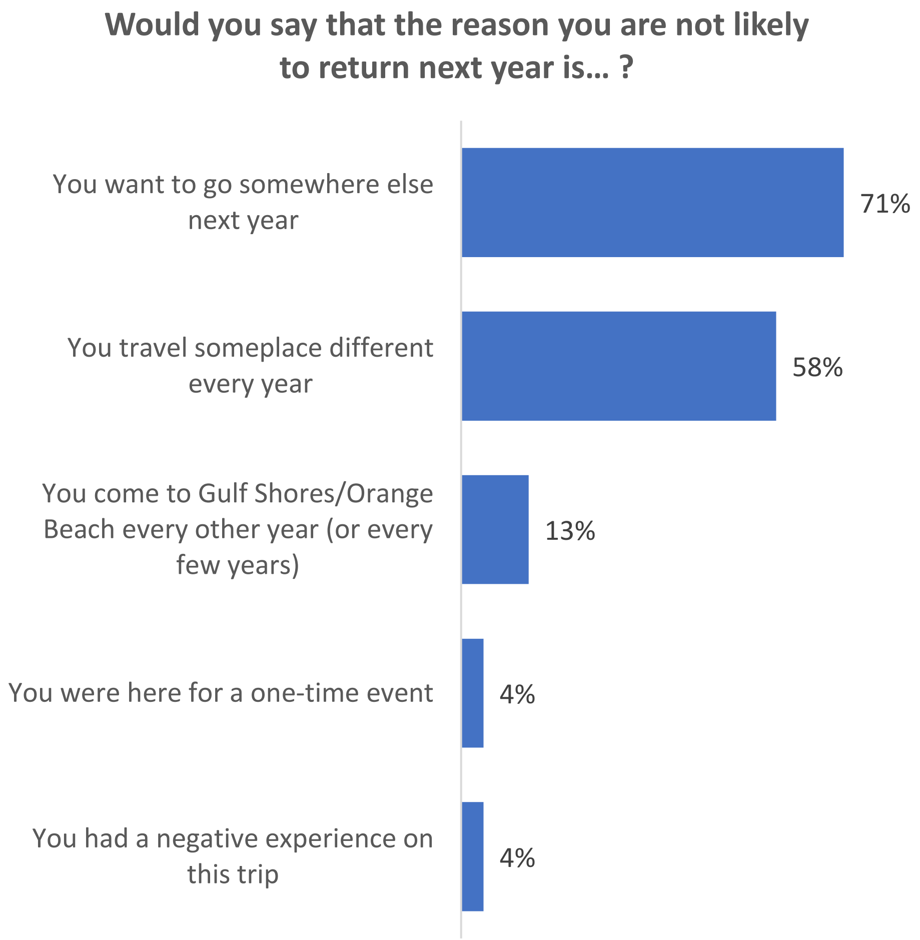
**Likelihood to visit GS/OB in the next year**




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

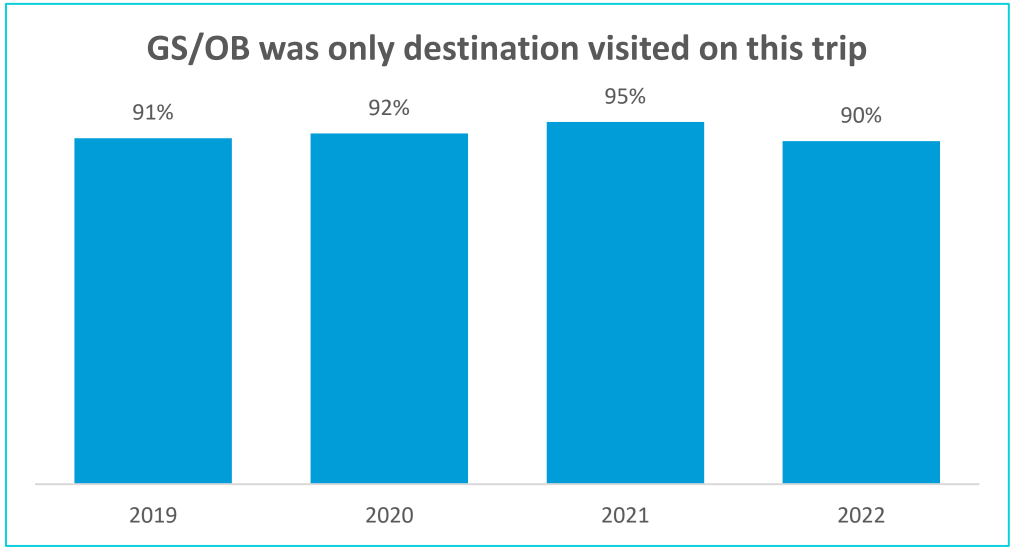
# Views Toward GS/OB & Trip Satisfaction

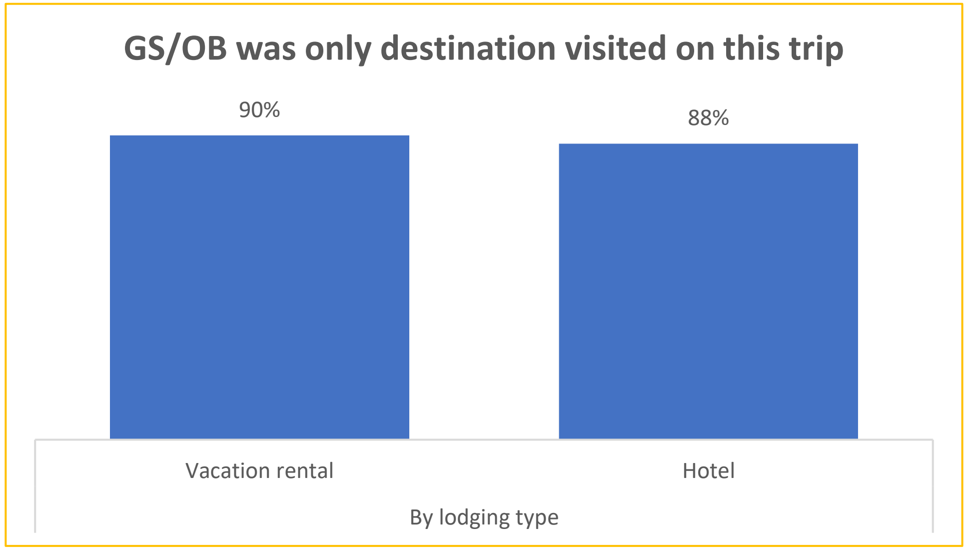
- Very few report being unlikely to visit GS/OB again. Only one is not at all likely and 25 are not very likely (including day trippers).
- Those who said they were not at all or not very likely to visit again were asked why. Most of the responses are typical of what we see when we ask travelers this: consumers choose *for* a different destination rather than *against* GS/OB.
- There were no comments about the tourism product that caused people to not plan a return.



# Destinations Visited

- GS/OB summer trips remain largely single-destination trips, although we did see a slight uptick in this during the height of the pandemic.



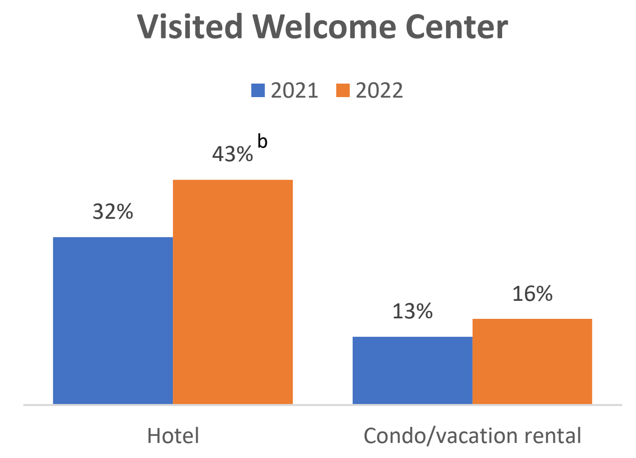

Question text: Was Gulf Shores/Orange Beach the only destination you visited on this trip? Yes/No

# Welcome Center Supplemental Analysis

Visitor Profile Research – Summer 2022

# Welcome Center Impact

- Hotel stayers continue to visit the welcome centers at a higher rate than vacation renters. But we see an uptick in usage this year by both lodging types.
- We don't typically see length of stay impacted by Welcome Center visitation, since trip length is typically determined before a trip begins.
- We continue to see Welcome Center visitors participate in more activities in the destination. Promoting activities and attractions at the centers is an excellent way to introduce new visitors to the destination, and to influence repeat visitors to try things they may not have considered in prior trips.
- Summer 2022 trips include more activities – 9.7 (up from 8.1 in 2021 and 6.6 in summer 2020). Longer trips and more places being open are certainly contributing to this increased engagement. The Welcome Centers are able to highlight what activities are available.




| Summer 2022 visits | No Welcome Center | Visited Welcome Center |
|---|---|---|
| Length of stay | 4.8 | 4.7 |
| # of activities on trip | 6.8 | 9.7 |

# Impact on Spending

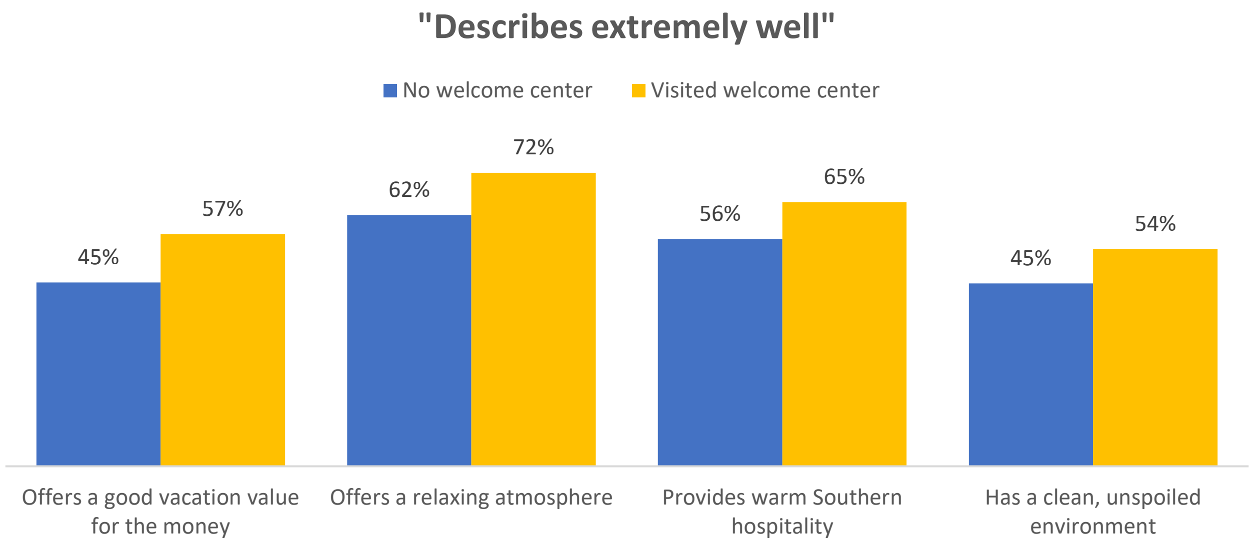
- As is the case with length of stay being decided ahead of time (and therefore less able to be impacted by Welcome Center visitation), lodging spending does not see an impact from Welcome Center visitation. And because hotel stayers (who spend less on lodging than vacation renters) tend to be the main users of Welcome Centers, we see a lower lodging spend among users.
- However, those categories where the Welcome Centers *can* impact spending are the areas where we see an increase in summer 2022 trip spending: shopping, recreation and entertainment, and transportation within the destination. This suggests that the Welcome Centers are associated with more exploration of the destination, higher engagement. and higher spending.

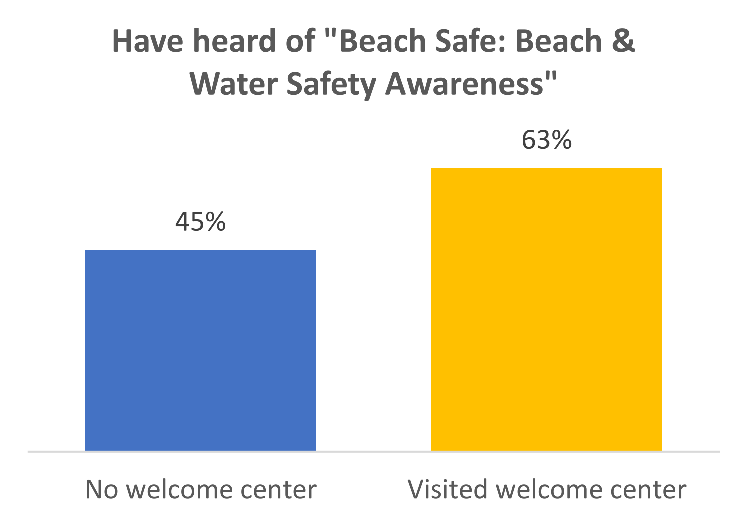
| Trip spending | No Welcome Center | Visited Welcome Center |
|---|---|---|
| Lodging | $1,428 | $870 |
| Meals/food/groceries | $462 | $420 |
| Shopping | $236 | $359 |
| Recreation or entertainment | $175 | $300 |
| Transportation within Gulf Shores | $47 | $93 |
| Other | $51 | $68 |
| **Total** | **$2,401** | **$2,111** |

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

# Impact on Image

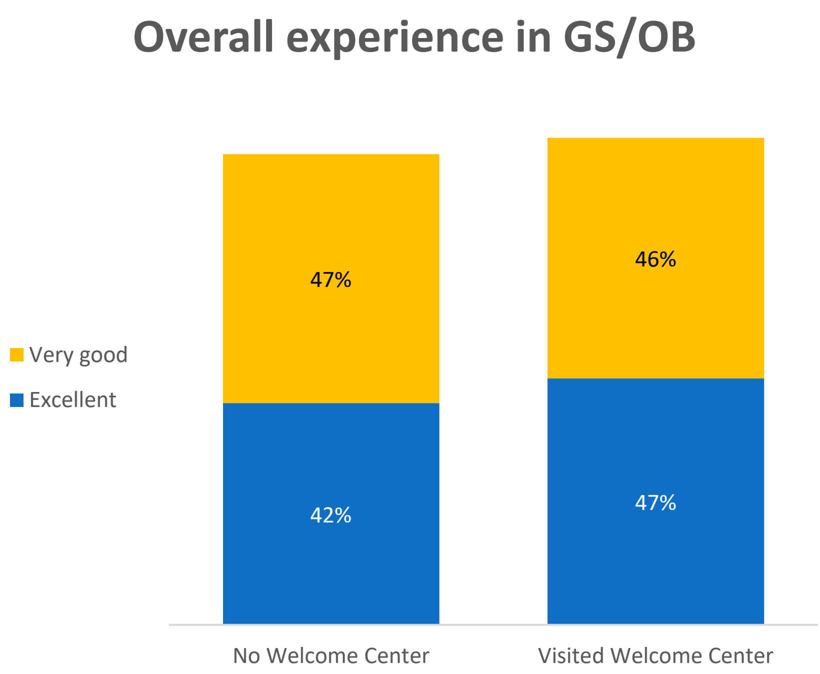
- Compared to those who did not visit a Welcome Center, center users agree more with image statements about GS/OB's value, atmosphere, hospitality, and environment.
- The Welcome Center is an opportunity for GSOBT to communicate these brand ideals to visitors.
- It is also an opportunity to communicate crucial safety information to visitors. Those who use the Welcome Centers are much more aware of GSOBT's Beach Safe program.

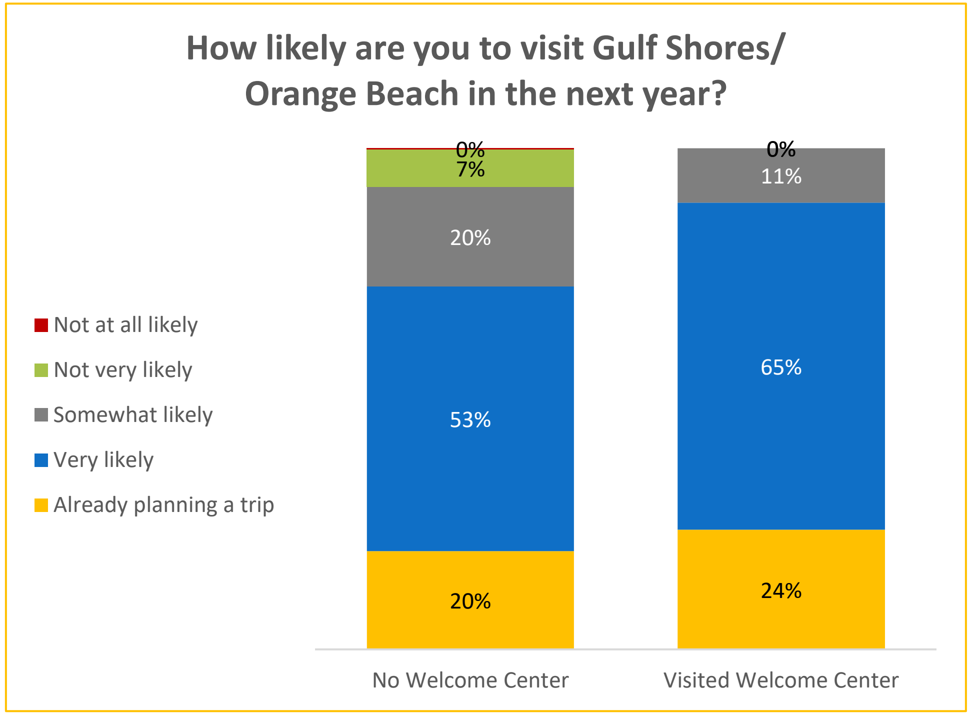


# Impact on Experience and Intent to Return

- Summer visitors who used a Welcome Center are more likely to report a positive overall experience in the destination.
- Welcome Center usage is associated with a higher likelihood to return to the destination.



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

# Appendix

Visitor Profile Research – Summer 2022

# Comparing Target to Other Travelers

- This year's day trip visitors have visited just over 2 times in the past year. As more destinations have come back online, SMARInsights has seen travelers venturing to places they were unable to visit during 2020 and 2021.
- GSOBT focuses analysis of non-target trips on day visits to the destination. These non-target day trips exclude local residents. Visitors from Pensacola are included.
- We also employed screening questions to ensure that day visitors are coming to Gulf Shores/Orange Beach for leisure, rather than for work.

| Non-target SUMMER Day trips | 2020 | 2021 | 2022 |
|---|---|---|---|
| Average # visits/year | 2.2 | 2.6 | 2.2 |
| First time trips | 24% | 16% | 22% |

2020 day trip n=100; 2021 day trip n=149; 2022 day trip n=58

# Comparing Target to Other Travelers

| Began planning summer trip | 2020 | | 2021 | | 2022 | |
|---|---|---|---|---|---|---|
| | Target travelers | Non-target Day trip | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) |
| < 1 week before trip | 5% | 66% | 6% | 69% | 0% | 41% [b] |
| 1-2 weeks | 14% | 17% | 11% | 18% | 6% | 21% [b] |
| 3 weeks - 1 month | 25% | 11% | 17% | 9% | 14% | 28% [b] |
| 2 - 3 months | 36% | 3% | 35% | 3% | 36% [a] | 5% |
| 4-6 months | 14% | 0% | 15% | 0% | 27% [a] | 0% |
| 6+ months | 7% | 3% | 15% | 1% | 17% [a] | 5% |

| GS/OB is only destination visited on this trip | 2020 | | 2021 | | 2022 | |
|---|---|---|---|---|---|---|
| | Target travelers | Non-target Day trip | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) |
| | 92% | 85% | 95% | 87% | 90% [a] | 67% |

2020 target n=401, day trip n=100; 2021 target n=350, day trip n=149; 2022 target n=417, day trip n=58
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 | 2020 | | 2021 | | 2022 | |
|---|---|---|---|---|---|---|
| | Target travelers | Non-target Day trip | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) |
| Family or friends | 33% | 20% | 35% | 34% | 35% | 31% |
| Gulf Shores & Orange Beach Tourism website | 17% | 12% | 27% | 13% | 38% | 21% |
| Social media | 18% | 18% | 21% | 10% | 22% | 17% |
| Travel blogs | 2% | 6% | 5% | 9% | 5% | 2% |
| Alabama's official tourism website | 5% | 9% | 7% | 9% | 9% | 12% |
| Traveler review sites or apps | 16% | 6% | 18% | 8% | 24% [a] | 12% |
| Travel/visitor guide | 6% | 8% | 12% | 7% | 16% | 14% |
| Travel advice websites or apps | 13% | 4% | 15% | 7% | 15% [a] | 5% |
| Booking websites or apps | 13% | 8% | 20% | 7% | 20% [a] | 5% |
| Hotel websites | 14% | 4% | 17% | 5% | 16% | 16% |
| Vacation home rental booking sites/apps | 46% | 4% | 33% | 5% | 48% [a] | 3% |
| Local vacation rental company sites | 11% | 2% | 17% | 5% | 15% [a] | 0% |
| Magazine and newspaper articles | 2% | 0% | 3% | 4% | 2% | 7% [b] |

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.

2020 target n=401, day trip n=100;
2021 target n=350, day trip n=149;
2022 target n=417, day trip n=58

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

# Comparing Target to Other Travelers

| Children on trip | 2020 | | 2021 | | 2022 | |
|---|---|---|---|---|---|---|
| | Target travelers | Non-target Day trip | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) |
| % of trips with children | 59% | 32% | 53% | 31% | 59% | 35% |
| Of trips with children: *2019 target n=295, day trip n=56; 2020 target n=204, day trip n=27; 2021 target n=168, day trip n=34* | | | | | | |
| < 6 years old | 44% | 48% | 37% | 41% | 45% | 22% |
| 6-11 years old | 57% | 37% | 44% | 76% | 61% | 39% |
| 12-17 years old | 55% | 78% | 63% | 35% | 56%b | 72% |

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 | 2020 | | 2021 | | 2022 | |
|---|---|---|---|---|---|---|
| | Target travelers | Non-target Day trip | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) |
| Automobile | 99% | 90% | 94% | 97% | 91% | 92% |
| Bus | 0% | 4% | 0% | 1% | 0% | 0% |
| Airplane | 1% | 5% | 6% | 2% | 8% | 7% |
| Other | 0% | 0% | 1% | 0% | 1% | 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.

2020 target n=401, day trip n=100;
2021 target n=350, day trip n=149;
2022 target n=417, day trip n=58
a / b indicate statistically significant differences at the 95% level.

# Comparing Target to Other Travelers

| | 2020 | | 2021 | | 2022 | |
|---|---|---|---|---|---|---|
| | Target travelers | Non-target Day trip | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) |
| Travel party size | 4.9 | 3.1 | 4.3 | 2.4 | 4.8 | 3.0 |

| Trip spending | 2020 | | 2021 | | 2022 | |
|---|---|---|---|---|---|---|
| | Target travelers | Non-target Day trip | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) |
| Lodging | $1,234 | $ - | $1,541 | $ - | $1,497 | $0 |
| Meals/food/groceries | $397 | $103 | $620 | $72 | $502 b | $113 |
| Shopping | $207 | $55 | $225 | $78 | $283 b | $97 |
| Recreation or entertainment | $167 | $51 | $158 | $47 | $220 b | $52 |
| Transportation in Gulf Shores | $48 | $32 | $68 | $24 | $61 b | $24 |
| Other | $44 | $28 | $67 | $18 | $57 b | $41 |
| TOTAL | $2,097 | $270 | $2,679 | $240 | **$2,619** b | $328 |
| **Per person spending** | **$428** | **$87** | **$623** | **$100** | **$542** | **$108** |

2020 target n=401, day trip n=100;
2021 target n=350, day trip n=149;
2022 target n=417, day trip n=58
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 | | 2020 | | 2021 | | 2022 | |
|---|---|---|---|---|---|---|---|
| | | Target travelers | Non-target Day trip | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) |
| **Age** | Average | 42 | 44 | 46 | 48 | 47 | 48 |
| **Marital status** | Married | 70% | 64% | 66% | 54% | 69% | 62% |
| | Divorced/Separated | 11% | 12% | 13% | 13% | 11% | 7% |
| | Widowed | 2% | 4% | 4% | 4% | 4% | 5% |
| | Single/Never married | 17% | 20% | 18% | 28% | 17% | 26% |
| **HH income** | Average | $115,949 | $101,600 | $118,352 | $102,138 | $118,504 | $108,190 |

2020 target n=401, day trip n=100; 2021 target n=350, day trip n=149; 2022 target n=417, day trip n=58
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 | 2020 | | 2021 | | 2022 | |
|---|---|---|---|---|---|---|
| | Target travelers | Non-target Day trip | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) |
| Offers plenty to see and do | 88% | 88% | 91% | 71% | 95% | 97% |
| Provides warm Southern hospitality | 91% | 86% | 91% | 86% | 92% | 95% |
| Has warm weather | 96% | 94% | 98% | 93% | 98% | 93% |
| Has a “family-friendly” atmosphere | 93% | 96% | 95% | 90% | 97% | 91% |
| Has nice weather | 94% | 80% | 92% | 86% | 94% | 91% |
| Has beautiful beaches | 93% | 90% | 95% | 84% | 95% | 91% |
| Is easy to get to by car | 92% | 92% | 95% | 93% | 89% | 90% |
| Has a variety of dining options at several price points | 89% | 86% | 90% | 86% | 93% | 90% |
| Has beautiful scenery | 93% | 96% | 95% | 84% | 96% | 90% |
| Offers a relaxing atmosphere | 92% | 94% | 93% | 86% | 96% | 86% |
| Is a safe destination | 94% | 86% | 92% | 86% | 95% | 84% |
| Has a variety of lodging options at multiple price points | 85% | 80% | 83% | 72% | 91% | 83% |
| Has a clean, unspoiled environment | 83% | 78% | 85% | 76% | 87% | 78% |
| Offers a good vacation value for the money | 87% | 80% | 84% | 74% | 88% | 76% |

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

2020 target n=401, day trip n=100;
2021 target n=350, day trip n=149
2022 target n=417, day trip n=58

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

# Comparing Target to Other Travelers

| Overall experience | 2020 | | 2021 | | 2022 | |
|---|---|---|---|---|---|---|
| | Target travelers | Non-target Day trip | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) |
| **Top 2 Box Rating** | **91%** | **85%** | **84%** | **83%** | **92%** | **76%** |
| 5 (Excellent) | 48% | 46% | 39% | 34% | 44% | 35% |
| 4 (Very good) | 43% | 39% | 45% | 48% | 48% [a] | 41% |
| 3 (Good) | 7% | 15% | 14% | 14% | 8% | 24% |
| 2 (Fair) | 1% | 0% | 2% | 2% | 0% | 0% |
| 1 (Poor) | 0% | 0% | 0% | 1% | 0% | 0% |

| Likelihood to recommend | 2020 | | 2021 | | 2022 | |
|---|---|---|---|---|---|---|
| | 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%** | **85%** | **92%** | **88%** | **95%** | **88%** |
| 5 (Extremely likely) | 69% | 53% | 67% | 56% | 67% | 57% |
| 4 | 26% | 32% | 25% | 32% | 28% | 31% |
| 3 | 4% | 12% | 7% | 10% | 5% | 10% |
| 2 | 0% | 3% | 1% | 2% | 0% | 2% |
| 1 (Not at all likely) | 0% | 0% | 0% | 0% | 0% | 0% |

2020 target n=401, day trip n=100; 2021 target n=350, day trip n=149; 2022 target n=417, day trip n=58
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 | 2020 | | 2021 | | 2022 | |
|---|---|---|---|---|---|---|
| | 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)** | **77%** | **76%** | **79%** | **84%** | **78%** | **69%** |
| 5 (Already planning a trip) | 24% | 12% | 25% | 12% | 21% | 21% |
| 4 (Very likely) | 53% | 64% | 54% | 72% | 58% | 48% |
| 3 (Somewhat likely) | 18% | 18% | 15% | 12% | 16% | 28% |
| 2 (Not very likely) | 5% | 4% | 5% | 3% | 6% | 3% |
| 1 (Not at all likely) | 0% | 2% | 1% | 0% | 0% | 0% |

| During which season(s) would you be most likely to visit (of those likely to visit) | 2020 | | 2021 | | 2022 | |
|---|---|---|---|---|---|---|
| | Target travelers | Non-target Day trip | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) |
| Spring | 29% | 40% | 32% | 54% | 34% | 52% [b] |
| Summer | 81% | 77% | 83% | 63% | 81% [a] | 54% |
| Fall | *28%* | *57%* | 27% | 50% | 33% | 46% [b] |
| Winter | 5% | 19% | 8% | 14% | 10% | 25% [b] |

2020 target n=401, day trip n=100; 2021 target n=350, day trip n=149; 2022 target n=417, day trip n=58
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 | 2020 | | 2021 | | 2022 | |
|---|---|---|---|---|---|---|
| | Target travelers | Non-target Day trip | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) |
| Alabama | 33% | 51% | 29% | 33% | 15% | 53% [b] |
| Texas | 8% | 10% | 15% | 3% | 15% | 14% |
| Mississippi | 13% | 6% | 7% | 9% | 8% | 9% |
| Missouri | 3% | 2% | 0% | 0% | 0% | 7% [b] |
| Indiana | 0% | 0% | 0% | 0% | 0% | 6% [b] |
| Georgia | 6% | 1% | 22% | 12% | 10% [a] | 5% |
| Louisiana | 21% | 15% | 11% | 2% | 8% | 5% |
| Illinois | 0% | 0% | 0% | 0% | 0% | 5% [b] |
| Florida | 3% | 12% | 3% | 38% | 0% | 3% |
| Tennessee | 8% | 1% | 12% | 3% | 9% [a] | 2% |
| Arkansas | 4% | 2% | 1% | 0% | 4% | 2% |
| Kentucky | 2% | 0% | 0% | 0% | 3% | 0% |
| Michigan | 0% | 0% | 0% | 0% | 0% | 0% |

2020 target n=401, day trip n=100; 2021 target n=350, day trip n=149; 2022 target n=417, day trip n=58
a / b indicate statistically significant differences at the 95% level.

# Comparing Non-Target Trips Year-Over-Year

| General activities (non-target trips) | 2020 | | 2021 | | 2022 | |
|---|---|---|---|---|---|---|
| | Target travelers | Non-target Day trip | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) |
| Dining out | 66% | 30% | 58% | 26% | 71%[b] | 53% |
| Relaxing | 63% | 32% | 54% | 26% | 67%[b] | 45% |
| Beaches | 80% | 52% | 71% | 32% | 85%[b] | 45% |
| Shopping | 43% | 15% | 48% | 17% | 57%[b] | 36% |
| Sightseeing | 21% | 17% | 23% | 13% | 36%[b] | 22% |
| Swimming | 64% | 31% | 52% | 16% | 62%[b] | 17% |
| Family/friends reunion | 8% | 3% | 9% | 3% | 6% | 10% |
| Visiting friends/relatives who live in the area | 8% | 6% | 9% | 23% | 10% | 7% |
| Fishing | 14% | 12% | 18% | 3% | 15% | 7% |
| Historical sites | 4% | 9% | 6% | 7% | 9% | 5% |
| Hiking on trails | 7% | 12% | 12% | 5% | 13%[b] | 5% |
| Exercise/working out | 16% | 4% | 10% | 9% | 12% | 3% |
| Parasailing/jet skiing | 5% | 2% | 4% | 1% | 5% | 3% |
| Photography | 7% | 8% | 13% | 9% | 12% | 3% |
| Festivals or special events (non-sports events) | 2% | 2% | 4% | 5% | 4% | 2% |
| Kayaking/canoeing/paddle boarding | 5% | 6% | 9% | 3% | 6% | 2% |
| Birdwatching | 3% | 4% | 4% | 5% | 8% | 2% |
| Boating or sailing | 11% | 5% | 10% | 4% | 10%[b] | 2% |
| Bicycle riding | 4% | 8% | 9% | 2% | 7% | 2% |
| Sporting events | 3% | 1% | 3% | 2% | 2% | 2% |
| Concerts and nightlife | 4% | 1% | 7% | 5% | 7% | 0% |
| Watching wildlife | 10% | 6% | 13% | 5% | 17%[b] | 0% |
| Scuba diving/snorkeling | 4% | 3% | 5% | 4% | 3% | 0% |
| Golfing | 4% | 2% | 7% | 4% | 7%[b] | 0% |
| Shelling | 15% | 9% | 18% | 4% | 16%[b] | 0% |
| Visiting a spa | 3% | 3% | 4% | 3% | 3% | 0% |
| Dolphin tour | 10% | 6% | 10% | 2% | 18% | 0% |
| Tennis | 2% | 2% | 2% | 1% | 2% | 0% |

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

2020 target n=401, day trip n=100;
2021 target n=350, day trip n=149;
2022 target n=417, day trip n=58
a / b indicate statistically significant differences at the 95% level.

# Comparing Non-Target Trips Year-Over-Year

| Specific attractions (non-target trips) | 2020 | | 2021 | | 2022 | |
|---|---|---|---|---|---|---|
| | Target travelers | Non-target Day trip | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) |
| Adventure Island | 3% | 2% | 9% | 3% | 9% | 3% |
| Alabama Gulf Coast Zoo | 6% | 4% | 6% | 7% | 9% | 10% |
| Alabama's Coastal Connection Scenic Byway | 8% | 5% | 12% | 7% | 10% | 9% |
| Battleship USS Alabama | 6% | 4% | 7% | 7% | 9% | 12% |
| Bellingrath Gardens | 2% | 1% | 2% | 3% | 3% | 3% |
| Bon Secour National Wildlife Refuge | 3% | 1% | 2% | 5% | 2% | 3% |
| Civil War History Trail | | | 4% | 2% | 4% | 2% |
| Coastal Birding Trail | | | 11% | 5% | 2% | 2% |
| Dauphin Island | 8% | 6% | 2% | 3% | 16% | 14% |
| Fort Morgan Historic Site | 6% | 6% | 5% | 3% | 12% | 7% |
| Gulf State Park | 12% | 10% | 14% | 9% | 21% [a] | 9% |
| Hugh S. Branyon Backcountry Trail | 1% | 2% | 3% | 2% | 2% | 2% |
| National Naval Aviation Museum | 2% | 1% | 4% | 4% | NA | NA |
| OWA Park | 4% | 2% | 7% | 7% | 5% | 5% |
| Tanger Outlets | 22% | 12% | 23% | 13% | 34% [a] | 12% |
| The Track | 8% | 2% | 7% | 3% | 6% [a] | 0% |
| The Wharf | 16% | 6% | 19% | 10% | 21% [a] | 3% |
| Tropic Falls Indoor Waterpark at OWA | | | | | 2% | 7% |
| Waterville | 3% | 4% | 4% | 5% | 5% | 3% |

2020 target n=401, day trip n=100; 2021 target n=350, day trip n=149; 2022 target n=417, day trip n=58
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.