



# **GULF SHORES & ORANGE BEACH TOURISM**

Alabama's White-Sand Beaches

## Visitor Profile Research

Fall 2022

Strategic Marketing & Research Insights LLC

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# Introduction

Visitor Profile Research – Fall 2022

# Background

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- The Gulf Shores & Orange Beach area is a year-round leisure travel destination featuring 32 miles of white-sand beaches along Alabama's southern border to the Gulf of Mexico. The destination remains largely condo/vacation rental in terms of paid lodging inventory. But with new hotel properties rapidly coming online, there is a need to understand different audiences and behaviors for hotel users versus the more traditional visitors who stay in vacation rentals.
- Gulf Shores & Orange Beach Tourism (GSOBT) is responsible for marketing the Alabama Gulf Coast as a year-round destination, while stewarding a thoughtful, sustainable level of growth. In support of this mission, GSOBT has conducted quarterly visitor profile research for nearly 20 years. To attract and manage additional visitation to the area, it is critical to first have a thorough understanding of the current situation, and visitor profiling is a vital way to gain that understanding.
- GSOBT began partnering with Strategic Marketing & Research Insights (SMARInsights) to gather information from 2017 and 2018 visitors to better understand the visitor experience, existing image of the area, demography and geographic origins of visitors by season. This report is the third of four seasonal reports for 2022.
- Notable happenings that may impact the Fall 2022 findings include a 2% lodging tax increase, voted in by City Council, effective September 2022, to be followed by another 1% in September 2023. The city's lodging tax is levied on hotel and vacation rental room charges. Some vacation rental companies fear the city is putting itself at a competitive disadvantage. The 3% hike would lift the city's overall room rate to 16 percent, which would put it ahead of most Gulf Coast cities enjoying a similar surge in tourism over the last decade.

# Research Objectives

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Gather information on Fall visitors, determining visitor origins and demographics



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



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



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



Compare data gathered from recent travelers to those who came to the area in prior 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 Fall 2022 (September through November).
- Potential respondents were screened to ensure they were travelers to the Gulf Shores/Orange Beach area and were at least 25 years of age.
- Travelers were asked about multiple trips.
- Target data is weighted to match the destination's actual occupancy rates (hotel and vacation rental) over the relevant time period, which in Fall 2022 was 42% condo/vacation rentals and 58% hotel stays.
- Surveys were conducted in the markets that Arrivalist's mobile data indicated were home markets for devices that spent time in the Gulf Shores/Orange Beach area during the Fall months.
- Data are presented for Fall 2019, 2021, and 2022 to enable comparison to pre-pandemic and recovery seasons.

| Number of trips represented in the data                  | Fall 2022 |
|--|-----------|
| Target trips (stayed 1-30 nights in paid accommodations) | 401       |
| Non-target trips (visited but did not stay overnight)    | 164       |



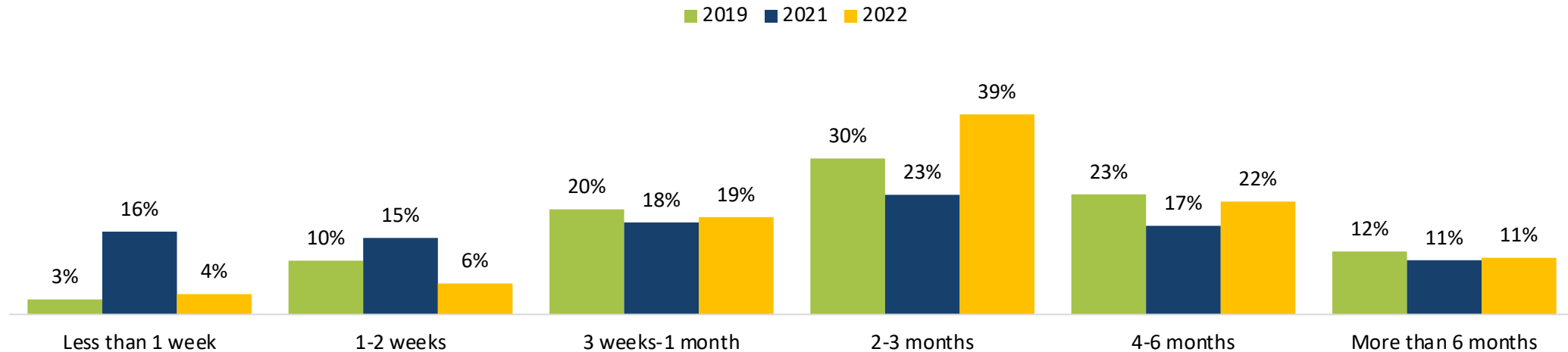
# Detailed Findings

Visitor Profile Research – Fall 2022

# Travel Planning

- Travel planning in Fall 2021 was dispersed fairly evenly in comparison to the previous years.
- Planning has since shifted with greater preference for longer planning windows with roughly two-thirds of visitors planning 2 to 6 months in advance of their trip.

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



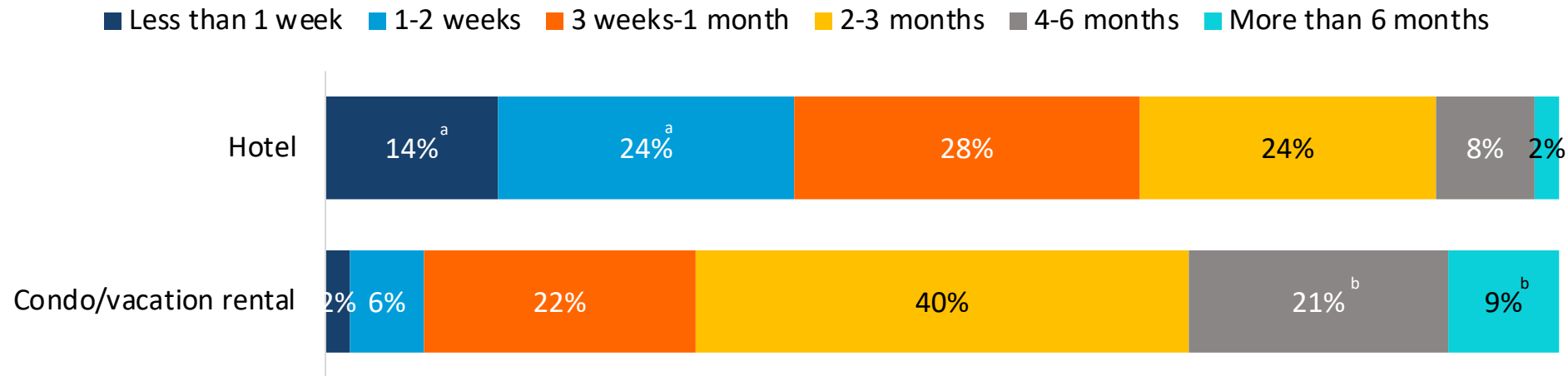
Question text: How far in advance did you begin planning your trip to Gulf Shores/Orange Beach? Response options as shown in graph above.



# Travel Planning – Hotel vs. Condo Rental

- Condo stayers and vacation renters prefer to plan farther in advance than their hotel staying counterparts.

**Fall Trip Planning Horizon by Lodging Type**

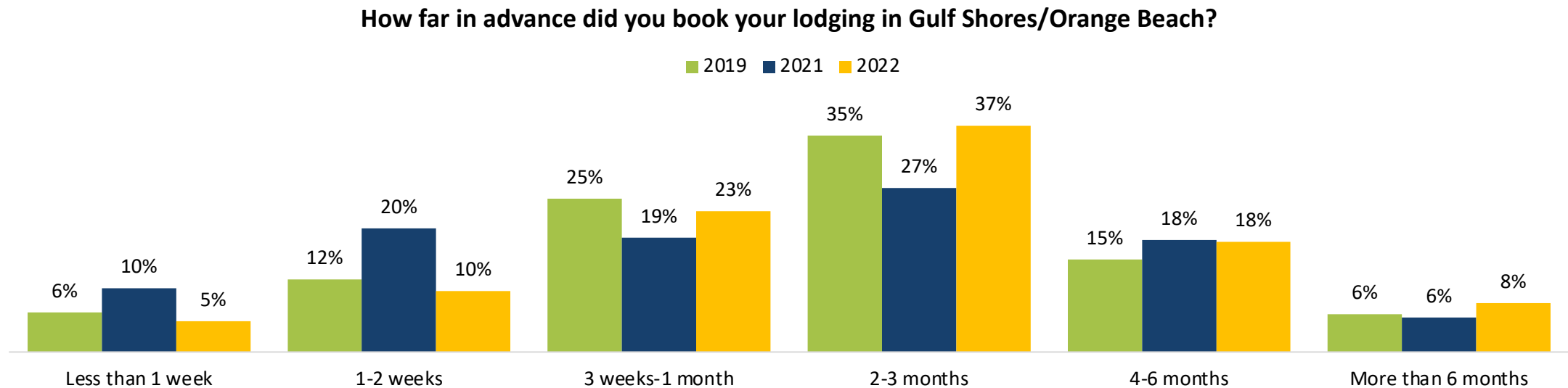


Vacation rental/condo n=139 (a); Hotel/motel n=262 (b); a / b indicate statistically significant differences at the 95% level.

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

- Lodging booking is shifting to pre-pandemic tendencies with most bookings occurring 2+ months out. This trend matches the shift in travel planning mentioned earlier.

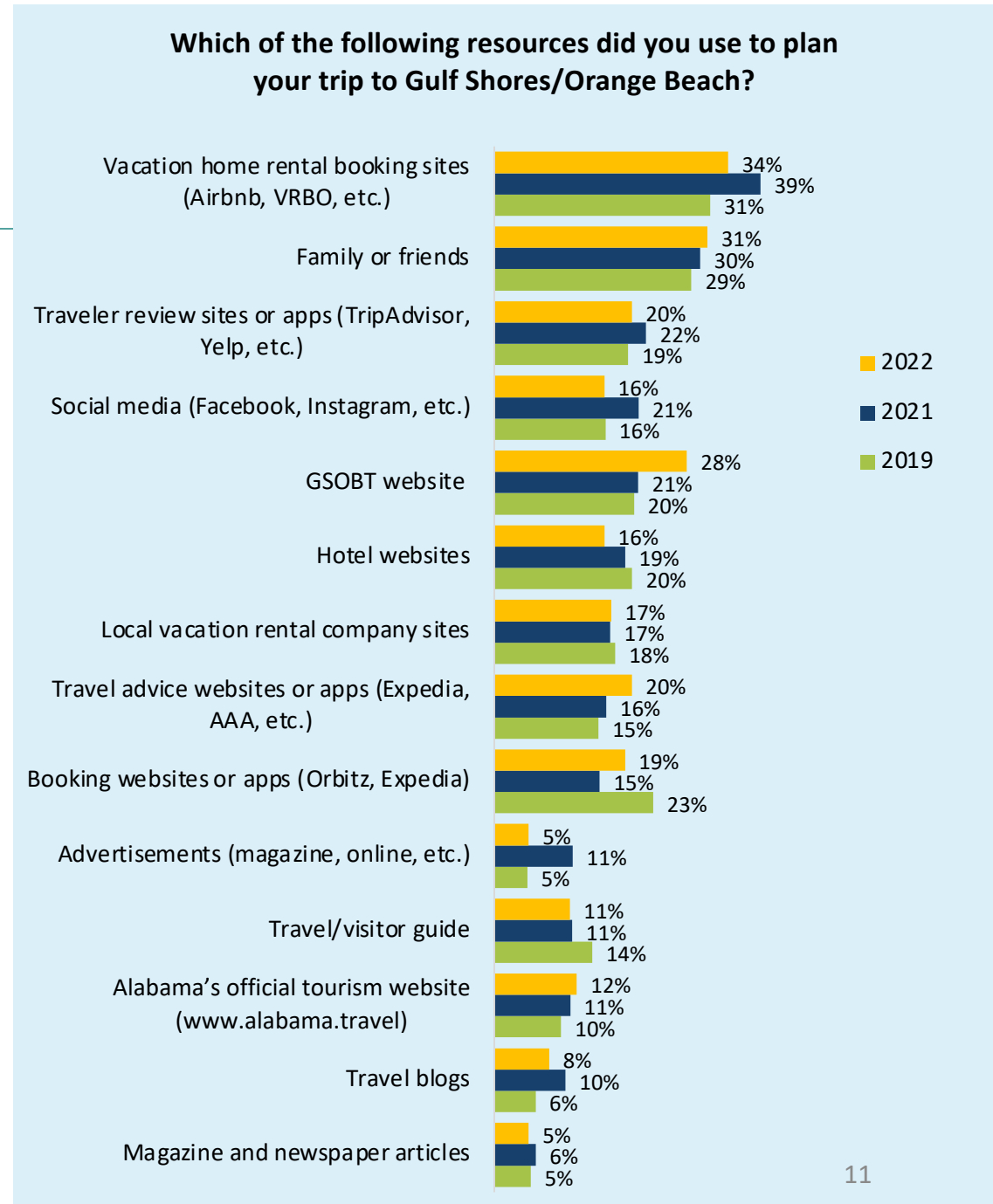


Question text: How far in advance did you book your lodging in Gulf Shores/Orange Beach? Response options as shown in graph.

# Travel Planning – Resources

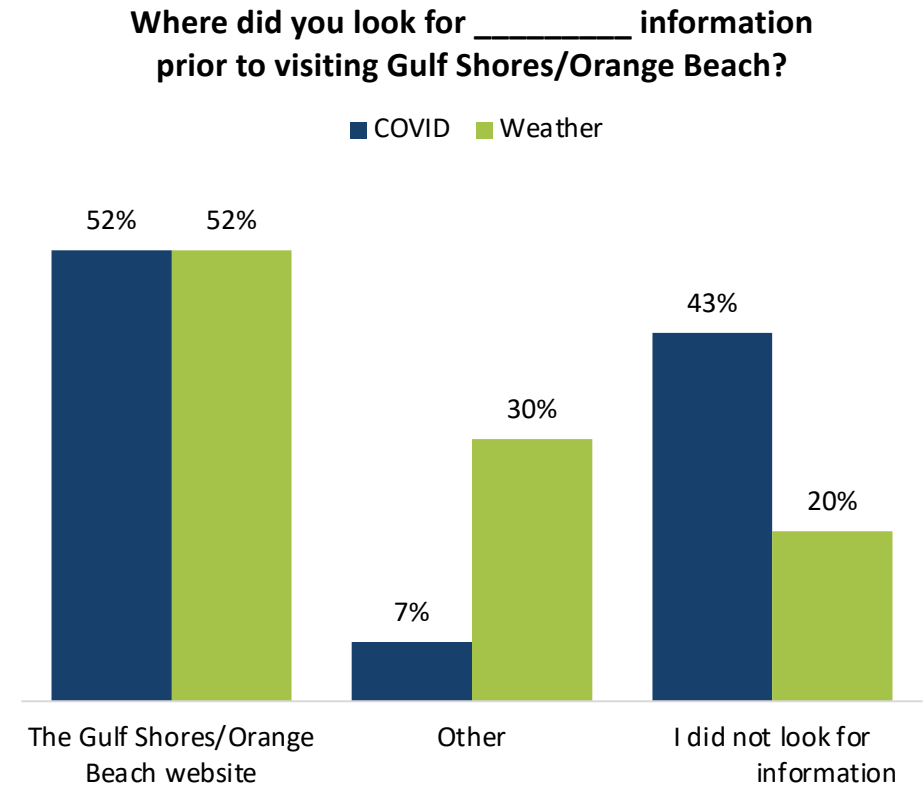
- Many of the travel planning resources used resemble that of 2019, with higher usage this fall for the GSOBT website.

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.



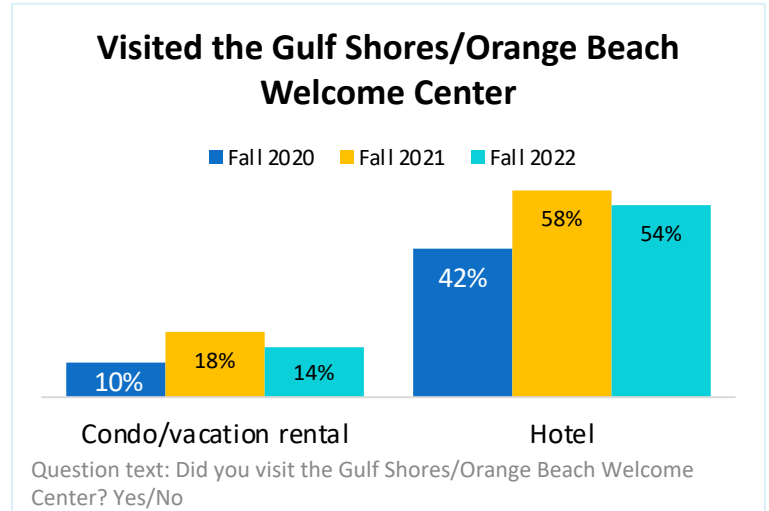
# Travel Planning – GSOBT Website

- Half of visitors looked for COVID information prior to visiting. Many reviewed the GSOBT website.
- An equal proportion of visitors looked for weather information on the GSOBT website. Other sources were used in planning for 30% of visitors.

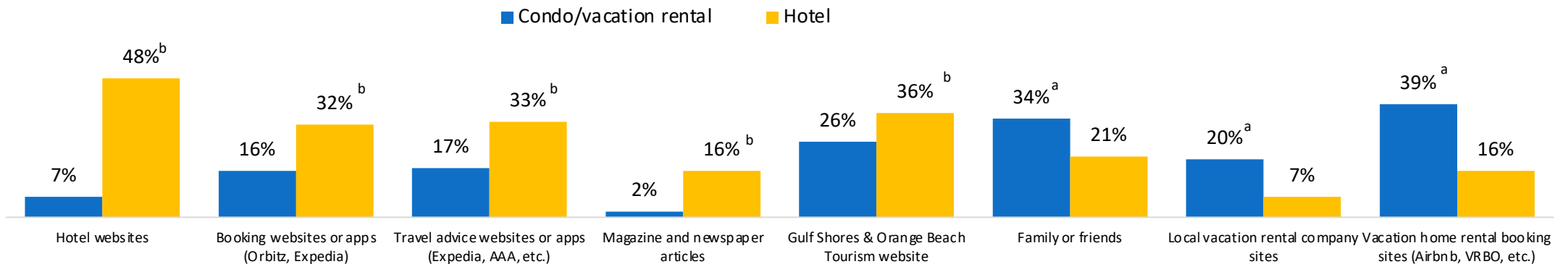


# Travel Planning – Hotel vs. Condo Rental

- Condo stayers have a stronger preference for planning with vacation home rental booking websites, local vacation rental company websites, and taking advice from family and friends. Condo stayers remain less likely to visit the welcome center than hotel stayers.
- Over half of hotel stayers visited the welcome center in Fall 2022. Although this percentage is smaller than in Fall 2021, the proportion is greater than the 42% of 2020.



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



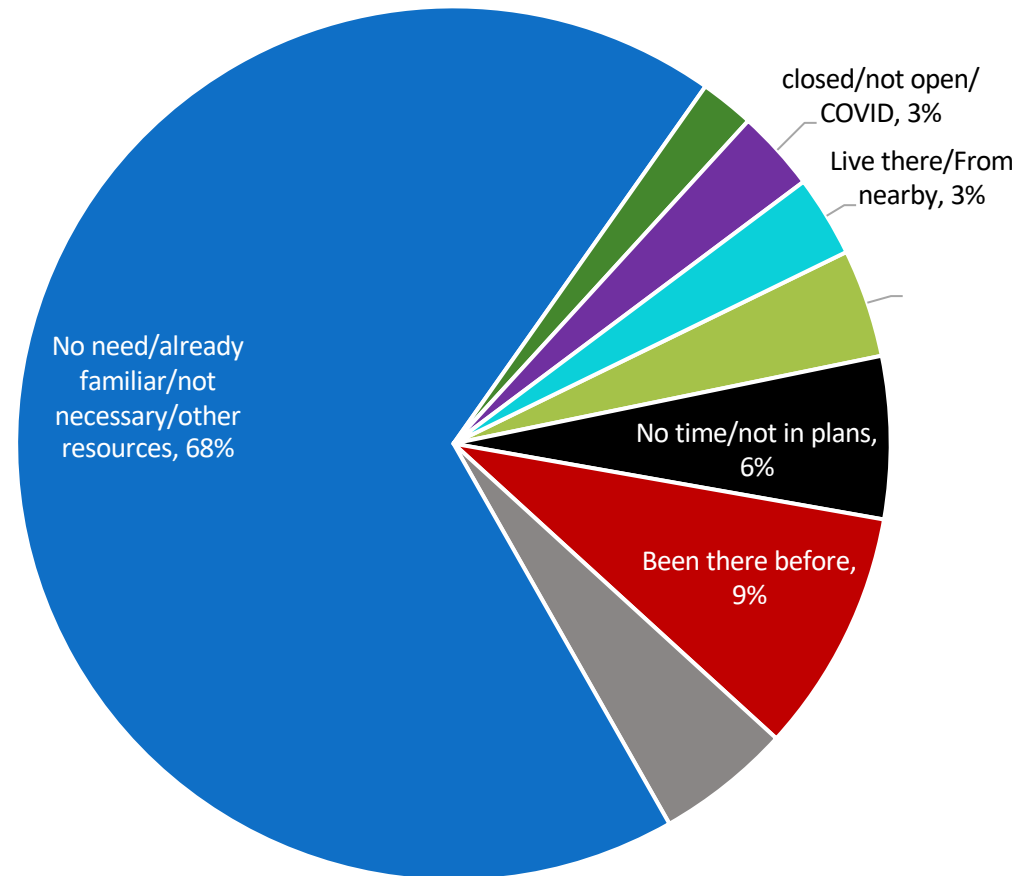
Vacation rental/condo n=139 (a); Hotel/motel n=262 (b); a / b indicate statistically significant differences at the 95% level.

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

- Two-thirds of consumers state that they are already familiar and see no need in visiting the welcome center.
- An additional 9% have already been before.

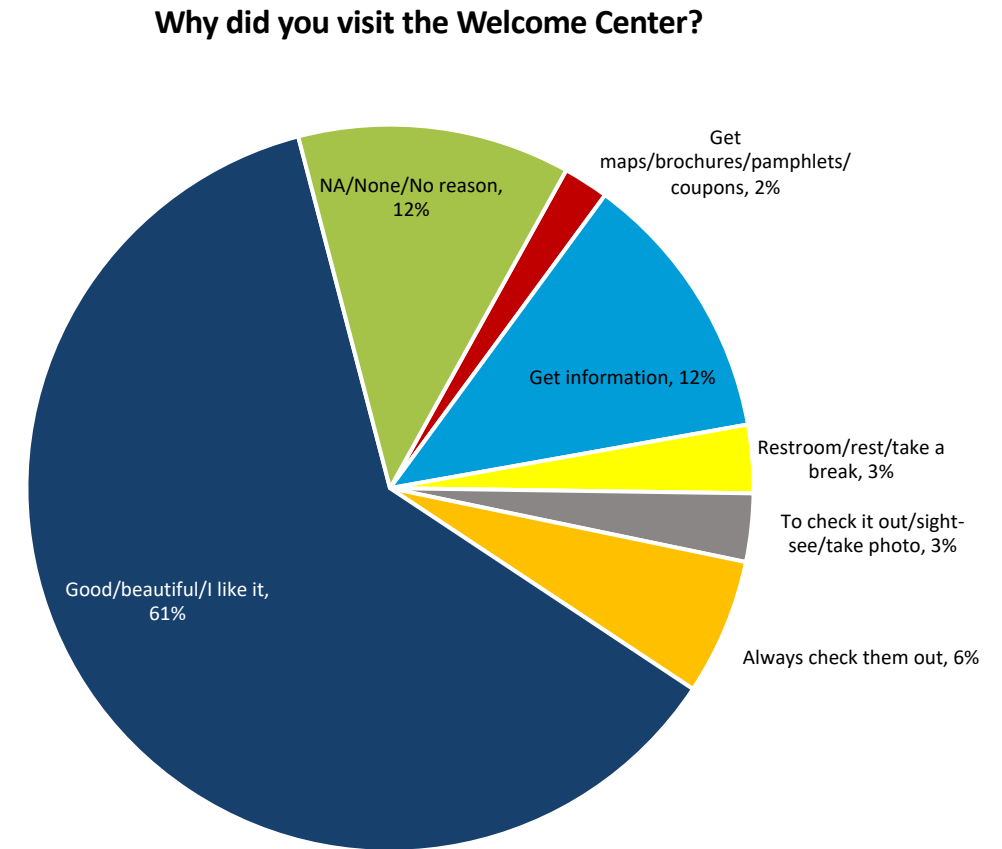
## Why didn't you visit the Welcome Center?



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

# Travel Planning – Welcome Center Visitors

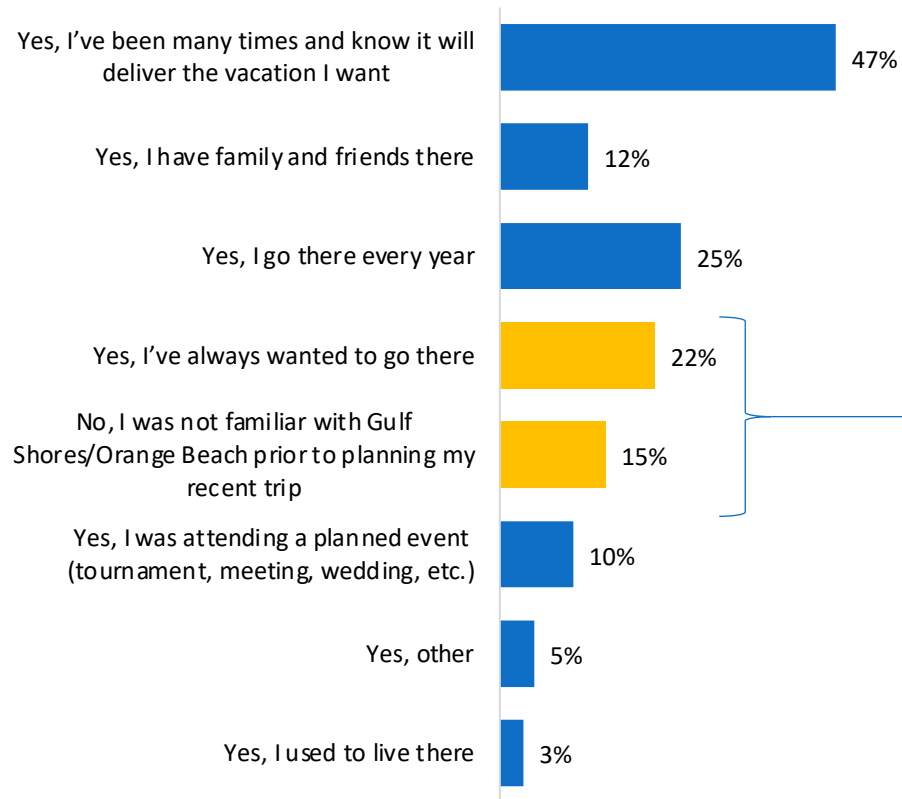
- The main reason visitors go to the GSOBT Welcome Center is to get information.
- This is consistent with the findings in Fall 2021.



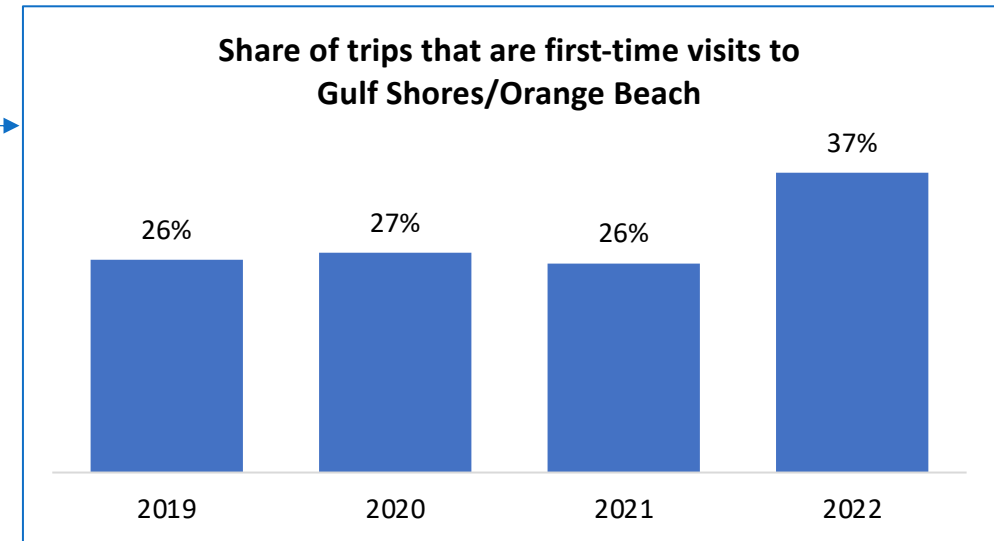
Question text: Why did you visit the welcome center? [Open ended response]

# Trip Characteristics

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



- 37% of Fall 2022 visitors were first-timers, roughly a 10-point increase from past levels.
- Half of visitors have been to the area many times before and a quarter are annual visitors.

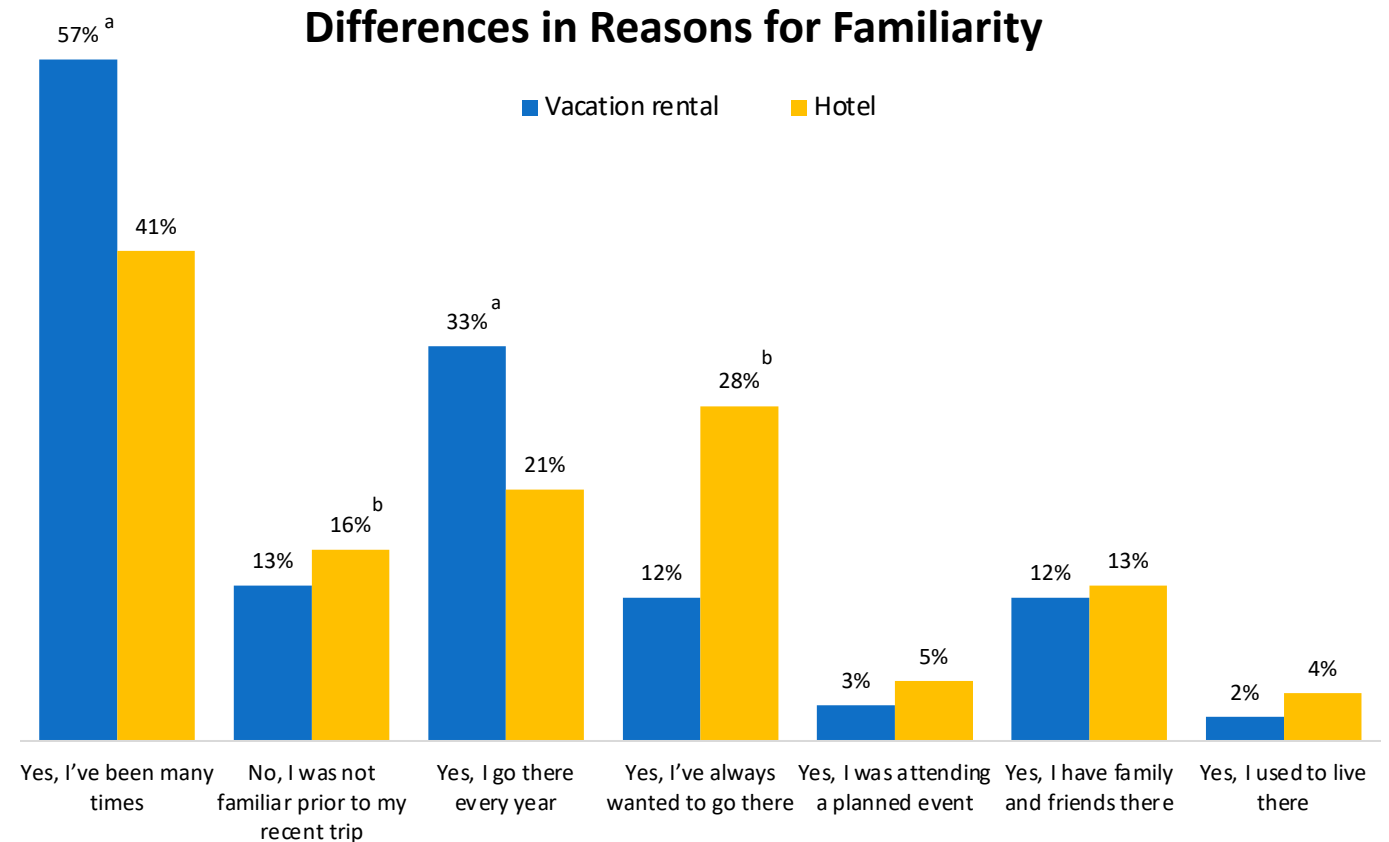


Question text: Prior to your visit, was Gulf Shores/Orange Beach familiar to you? Response options as shown in graph above.



Condo stayers are more likely to be repeat/annual visitors.

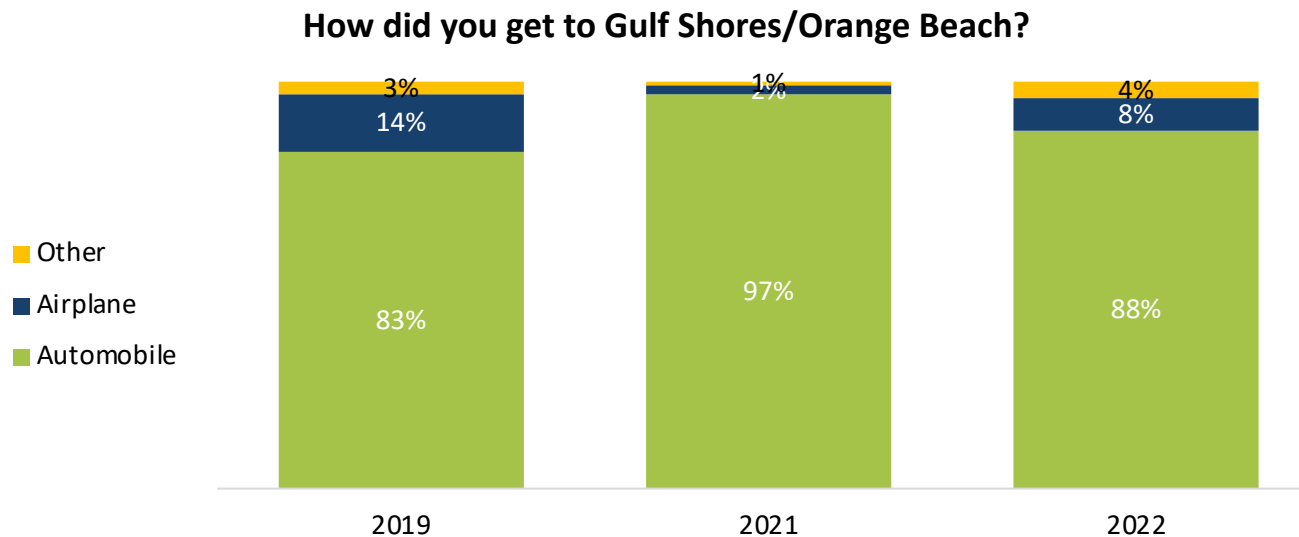
Hotel stayers tend to be first-time visitors, acting on their aspirational goals of visiting the area.



Vacation rental/condo n=139 (a); Hotel/motel n=262 (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

- While 88% of visitors drove to GS/OB, more are flying as their main way of traveling than in past years.
- This transportation pattern begins to resemble the pre-pandemic shares of fly/drive trips.



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

- The GS/OB beaches continue to be the most popular attraction for Fall trips, followed by dining out and relaxing.
- Fall 2022 saw a return to pre-pandemic participation levels of relaxing, swimming, wildlife watching, and visiting friends and family.

| Fall trip participation                   | 2019 | 2021 | 2022 |
|---|------|------|------|
| Beaches                                   | 69%  | 71%  | 75%  |
| Dining out                                | 67%  | 62%  | 66%  |
| Relaxing                                  | 66%  | 54%  | 62%  |
| Shopping                                  | 47%  | 48%  | 43%  |
| Swimming                                  | 37%  | 41%  | 36%  |
| Tanger Outlets                            | 29%  | 34%  | 27%  |
| Sightseeing                               | 29%  | 25%  | 32%  |
| Gulf State Park                           | 20%  | 18%  | 23%  |
| The Wharf                                 | 18%  | 17%  | 24%  |
| Photography                               | 11%  | 15%  | 12%  |
| Exercise/Working out                      | 11%  | 14%  | 11%  |
| Dolphin tour                              | 11%  | 12%  | 6%   |
| Shelling                                  | 16%  | 12%  | 16%  |
| Dauphin Island                            | 11%  | 12%  | 12%  |
| Fort Morgan Historic Site                 | 13%  | 12%  | 12%  |
| Boating or sailing                        | 6%   | 11%  | 8%   |
| Fishing                                   | 8%   | 10%  | 12%  |
| The Track                                 | 5%   | 10%  | 6%   |
| Hiking on trails                          | 8%   | 9%   | 11%  |
| Family/friends reunion                    | 7%   | 9%   | 12%  |
| Battleship USS Alabama                    | 10%  | 9%   | 7%   |
| Alabama's Coastal Connection Scenic Byway | 8%   | 9%   | 13%  |
| Golfing                                   | 9%   | 9%   | 6%   |
| Watching wildlife                         | 15%  | 9%   | 16%  |
| Historical sites                          | 13%  | 9%   | 11%  |
| OWA Park                                  | 3%   | 8%   | 5%   |

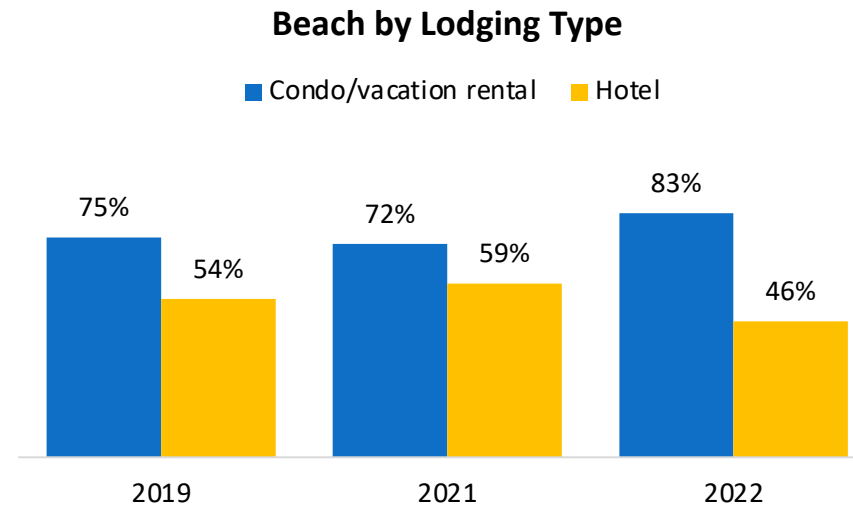
| Cont'd.                                | 2019 | 2021 | 2022 |
|--|------|------|------|
| Visiting friends/relatives in the area | 13%  | 8%   | 12%  |
| Concerts and nightlife                 | 11%  | 8%   | 7%   |
| Parasailing/Jet skiing                 | 4%   | 8%   | 4%   |
| Bicycle riding                         | 5%   | 7%   | 7%   |
| Birdwatching                           | 5%   | 6%   | 5%   |
| Visiting a spa                         | 6%   | 6%   | 5%   |
| Adventure Island                       | 9%   | 6%   | 5%   |
| Alabama Gulf Coast Zoo                 | 8%   | 6%   | 8%   |
| National Naval Aviation Museum         | 8%   | 6%   | 6%   |
| Sporting events                        | 6%   | 5%   | 3%   |
| Bellingrath Gardens                    | 4%   | 5%   | 4%   |
| Kayaking/Canoeing/Paddle boarding      | 7%   | 4%   | 3%   |
| Bon Secour National Wildlife Refuge    | 6%   | 4%   | 4%   |
| Festivals or special events            | 10%  | 4%   | 5%   |
| Hugh S. Branyon Backcountry Trail      | 2%   | 4%   | 1%   |
| Coastal Birding Trail                  |      | 4%   | 3%   |
| Tennis                                 | 2%   | 4%   | 2%   |
| Waterville                             | 5%   | 3%   | 2%   |
| Civil War History Trail                |      | 2%   | 2%   |
| Scuba diving/Snorkeling                | 4%   | 2%   | 2%   |

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

# Trip Characteristics

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- Beach goers continue to stay at condos and vacation rentals at a higher rate than stay at hotels. Fall 2022 saw a seasonal low of hotel stays for beach goers.

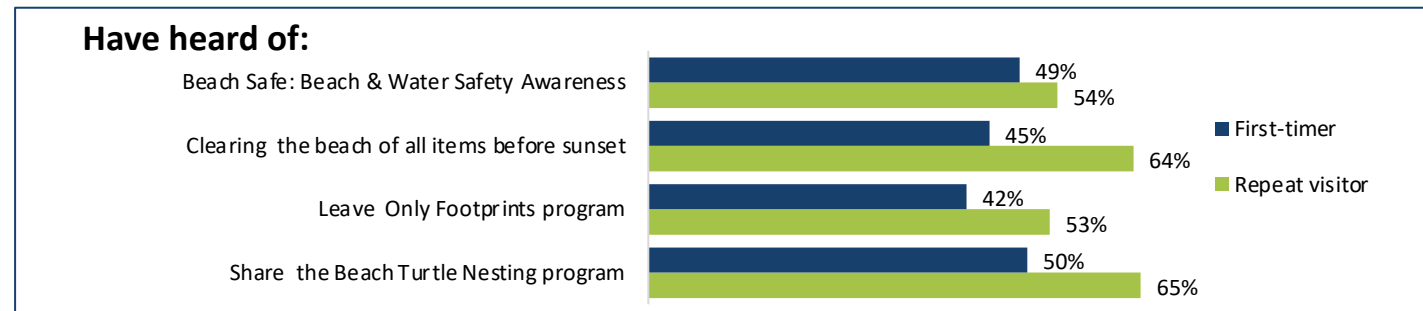


Question text: What attractions and activities did you visit or participate in while in Gulf Shores/Orange Beach on your trip? Response chosen: beach Vacation rental/condo n=139 (a); Hotel/motel n=262 (b)

# Trip Characteristics

- Beaches remain the leading motivator for visits to GS/OB in Fall 2022.
- Repeat visitors are more likely to have heard of any of GSOBT's campaigns. Half of first-time visitors are aware of the Beach Safe and Share the Beach Turtle Nesting programs.
- Visitors are less aware of the Leave Only Footprints campaign than of the other programs.

| Fall trip motivators                   | 2019 | 2021 | 2022 |
|--|------|------|------|
| Beaches                                | 61%  | 58%  | 62%  |
| Relaxing                               | 42%  | 29%  | 39%  |
| Dining out                             | 31%  | 24%  | 27%  |
| Shopping                               | 16%  | 10%  | 15%  |
| Sightseeing                            | 8%   | 5%   | 13%  |
| Swimming                               | 13%  | 14%  | 12%  |
| Visiting friends/relatives in the area | 8%   | 4%   | 9%   |
| Gulf State Park                        | 7%   | 5%   | 8%   |
| Tanger Outlets                         | 10%  | 11%  | 6%   |
| Fishing                                | 4%   | 6%   | 5%   |



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 increased from Fall 2021, as a result of increases in spending in all categories, most notably lodging. The breakdown of spending by lodging type shows the lodging spend by hotel stayers continues to rise while many of the other spending categories remain relatively level.

## ALL TARGET VISITORS

| Average Travel Party Expenditures per Trip – FALL | 2019           |            | 2021           |            | 2022           |            |
|---|----------------|------------|----------------|------------|----------------|------------|
|   | Spending       | % of total | Spending       | % of total | Spending       | % of total |
| Lodging   | \$812          | 50%        | \$945          | 52%        | \$946          | 51%        |
| Meals/food/ groceries                             | \$333          | 20%        | \$401          | 22%        | \$381          | 20%        |
| Shopping  | \$260          | 16%        | \$211          | 12%        | \$246          | 13%        |
| Recreation or entertainment                       | \$143          | 9%         | \$154          | 9%         | \$170          | 9%         |
| Transportation within Gulf Shores                 | \$53           | 3%         | \$49           | 3%         | \$65           | 4%         |
| Other   | \$37           | 2%         | \$52           | 3%         | \$54           | 3%         |
| <b>TOTAL</b>                                      | <b>\$1,638</b> |            | <b>\$1,811</b> |            | <b>\$1,863</b> |            |

2019 n=437; 2021 n=408; 2022 n=401

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.

## TARGET VISITORS BY LODGING TYPE

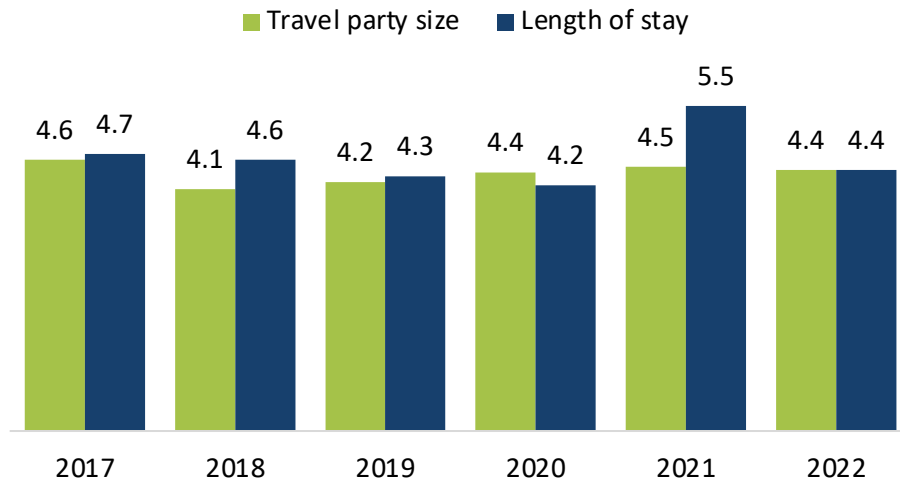
| Average Travel Party Expenditures per Trip – SUMMER | 2019            |                | 2021            |                | 2022                 |                    |
|---|-----------------|----------------|-----------------|----------------|----------------------|--------------------|
|   | Vacation rental | Hotel          | Vacation rental | Hotel          | Vacation rental      | Hotel              |
| Lodging   | \$924           | \$493          | \$1,012         | \$463          | \$1,055 <sup>b</sup> | \$537              |
| Meals/food/groceries                                | \$350           | \$282          | \$416           | \$291          | \$408 <sup>b</sup>   | \$282              |
| Shopping  | \$262           | \$252          | \$204           | \$256          | \$251                | \$226              |
| Recreation or entertainment                         | \$131           | \$177          | \$157           | \$133          | \$167                | \$184              |
| Transportation within Gulf Shores                   | \$40            | \$91           | \$48            | \$57           | \$51                 | \$117 <sup>a</sup> |
| Other   | \$33            | \$51           | \$53            | \$44           | \$49                 | \$73               |
| <b>TOTAL</b>  | <b>\$1,740</b>  | <b>\$1,345</b> | <b>\$1,891</b>  | <b>\$1,243</b> | <b>\$1,982</b>       | <b>\$1,420</b>     |

Condo/vacation rental 2019 n=206; 2021 n=152; 2022 n=139

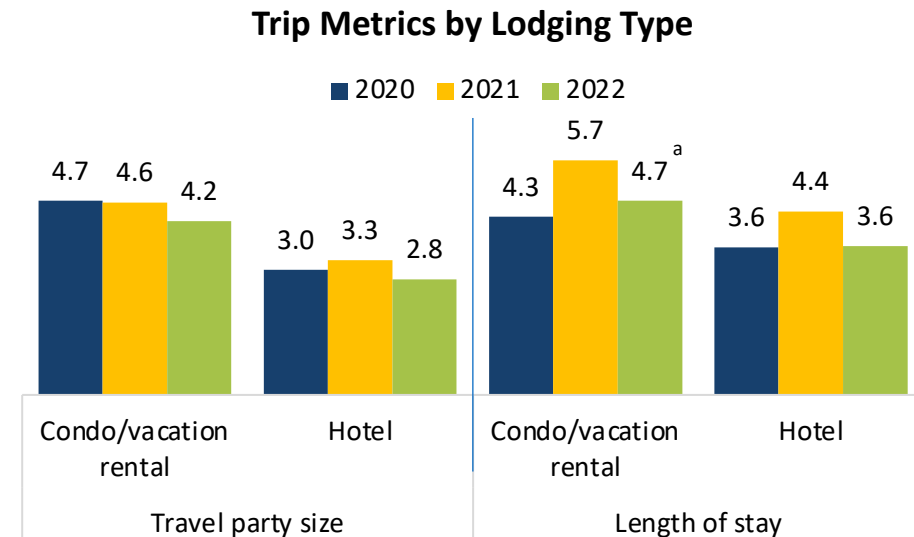
Hotel/motel 2019 n=231; 2021 n=256; 2022 n=262

# Travel Party Characteristics

- Fall 2022 visitors traveled in similarly sized groups as in the past.
- The average length of stay decreased slightly from the previous year but is in line with the averages of the prior years. Travel party sizes are getting smaller and trip lengths shorter for both condo and hotel stayers.



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.

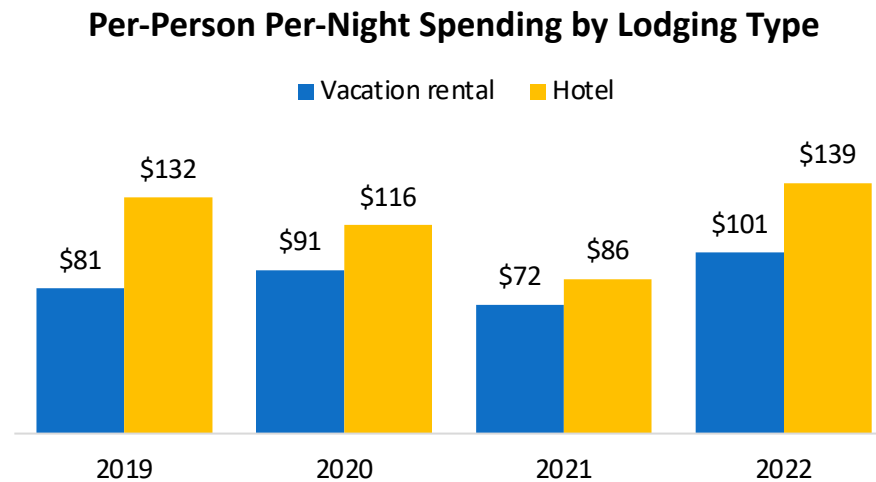
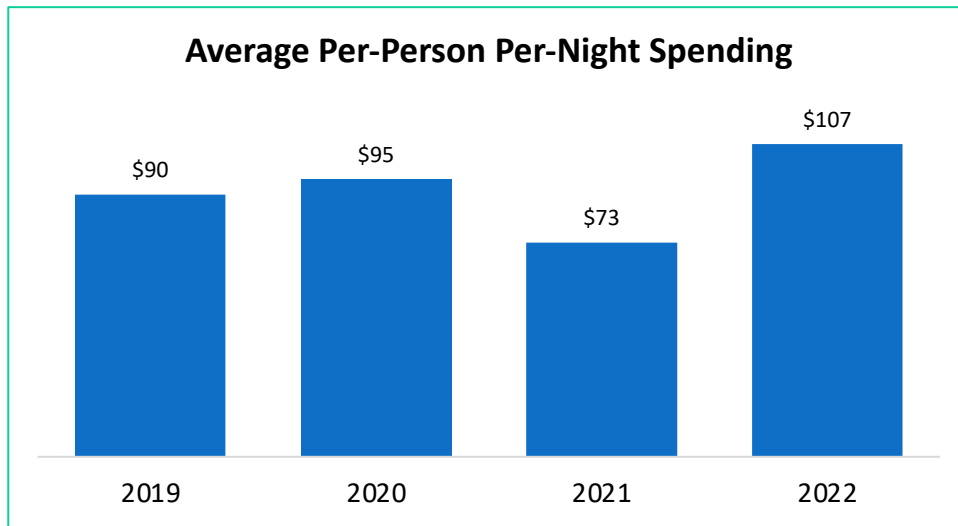


Condo/vacation rental 2020 n=122; 2021 n=152; 2022 n=262  
Hotel/motel 2020 n=214; 2021 n=256; 2022 n=139

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

# Trip Characteristics

- Considering the shorter stays yet higher spending, Fall 2022 visitors spent more per-person per-night than in the past. Hotel stayers had one of the highest spends (per-person, per-night) recorded.
- Fall 2022 spending patterns are more pronounced due to the lows of Fall 2021.



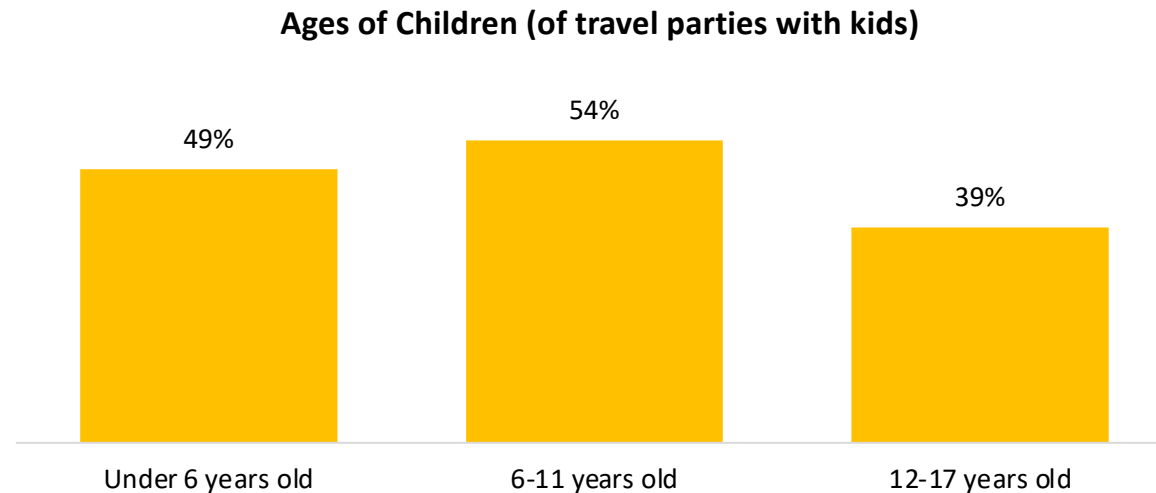
Question text: To help us better understand the economic impact of tourism, what was the approximate amount of money your travel party spent while in Gulf Shores/Orange Beach on your trip? [Category prompts]  
Including yourself, how many people were in your travel party? How many nights did you stay in Gulf Shores/Orange Beach during this trip? If you did not stay overnight, please enter '0'. Open-ended numeric responses.  
Condo/vacation rental 2020 n=122; 2021 n=152; 2022 n=139  
Hotel/motel 2020 n=214; 2021 n=256; 2022 n=262



# Travel Party Characteristics

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- Roughly half of trips with children included children under 11 years old.



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

# Travel Party Characteristics

- The demographics of Fall 2022 visitors tend to follow similar patterns as past years with the exception of age and income.
- Given the marginally higher age skew, visitors this past fall tended to have a slightly higher income.

| Year-over-Year Demographic Profile Summer visitors |                      | 2019      | 2021      | 2022      |
|--|----------------------|-----------|-----------|-----------|
| Age  | Average              | 49        | 45        | 48        |
| Marital status                                     | Married              | 72%       | 69%       | 69%       |
|  | Divorced/ Separated  | 9%        | 10%       | 10%       |
|  | Widowed              | 5%        | 3%        | 3%        |
|  | Single/Never married | 15%       | 18%       | 18%       |
| HH income  | Average              | \$129,417 | \$119,879 | \$132,685 |

2019 n=336; 2021 n=408; 2022 n=401

Question text: Are you...? (Male, Female) What is your age? Are you currently...? (Married, Divorced/Separated, Widowed, Single/Never married)

Which of the following categories best represents the total annual income for your household before taxes? (Less than \$35,000, \$35,000 but less than \$50,000, \$50,000 but less than \$75,000, \$75,000 but less than \$100,000, \$100,000 or more)

# Travel Party Characteristics

- The higher age difference is driven by both lodging types but to a greater degree by condo stayers (average age 51). This represents a return to the pre-pandemic levels of age and income after a couple of years of younger, less affluent visitors.
- Average income levels have increased for both lodging types, as result of older travelers.
- A greater proportion of executives are staying in condos than there were in Fall 2021. The share of retirees declined for hotels. These changes influence average income.

| Summer demographic profile by lodging type |                            | 2019                  |           | 2021                  |           | 2022                  |                  |
|--|----------------------------|-----------------------|-----------|-----------------------|-----------|-----------------------|------------------|
|  |                            | Vacation rental/condo | Hotel     | Vacation rental/condo | Hotel     | Vacation rental/condo | Hotel            |
| Age  | Average                    | 49                    | 47        | 47                    | 45        | 51 <sup>b</sup>       | 46               |
| Marital status                             | Married                    | 76%                   | 68%       | 73%                   | 65%       | 67%                   | 70%              |
|  | Divorced/Separated         | 10%                   | 7%        | 6%                    | 14%       | 17% <sup>b</sup>      | 6%               |
|  | Widowed                    | 5%                    | 5%        | 4%                    | 2%        | 3%                    | 4%               |
|  | Single/Never married       | 10%                   | 20%       | 17%                   | 19%       | 13%                   | 21%              |
| HH income                                  | Average                    | \$128,758             | \$133,518 | \$116,509             | \$126,157 | \$128,433             | \$139,279        |
| Education                                  | College grad+              | 64%                   | 66%       | 68%                   | 67%       | 68%                   | 64%              |
| Occupation                                 | Executive/upper management | 16%                   | 25%       | 5%                    | 24%       | 12%                   | 25% <sup>a</sup> |
|  | IT professional            | 3%                    | 12%       | 11%                   | 8%        | 11%                   | 16%              |
|  | Educator                   | 11%                   | 4%        | 14%                   | 8%        | 14% <sup>b</sup>      | 6%               |
|  | Healthcare                 |                       |           | 6%                    | 10%       | 8%                    | 7%               |
|  | Homemaker                  | 13%                   | 7%        | 14%                   | 5%        | 6%                    | 5%               |
|  | Student                    | 0%                    | 2%        | 1%                    | 0%        | 2%                    | 1%               |
|  | Small business owner       | 7%                    | 5%        | 9%                    | 3%        | 3%                    | 7%               |
|  | Skilled trade/service      | 8%                    | 13%       | 6%                    | 8%        | 3%                    | 9% <sup>a</sup>  |
|  | Other                      | 20%                   | 16%       | 11%                   | 10%       | 21%                   | 13%              |
|  | Retired                    | 20%                   | 16%       | 19%                   | 20%       | 17%                   | 10%              |
|  | Not currently employed     | 1%                    | 2%        | 4%                    | 4%        | 4%                    | 4%               |
|  |                            |                       |           |                       |           |                       |                  |
| Ethnicity                                  | Caucasian/White            | 88%                   | 75%       | 86%                   | 85%       | 91%                   | 87%              |
|  | African-American/Black     | 5%                    | 13%       | 7%                    | 13%       | 5%                    | 11%              |
|  | Latino/Hispanic            | 4%                    | 9%        | 3%                    | 3%        | 5%                    | 12%              |
|  | Asian                      | 3%                    | 8%        | 4%                    | 2%        | 4%                    | 2%               |
|  | American Indian            | 2%                    | 3%        | 2%                    | 1%        | 0%                    | 1%               |
|  | Other                      | 1%                    | 1%        | 2%                    | 0%        | 0%                    | 2%               |

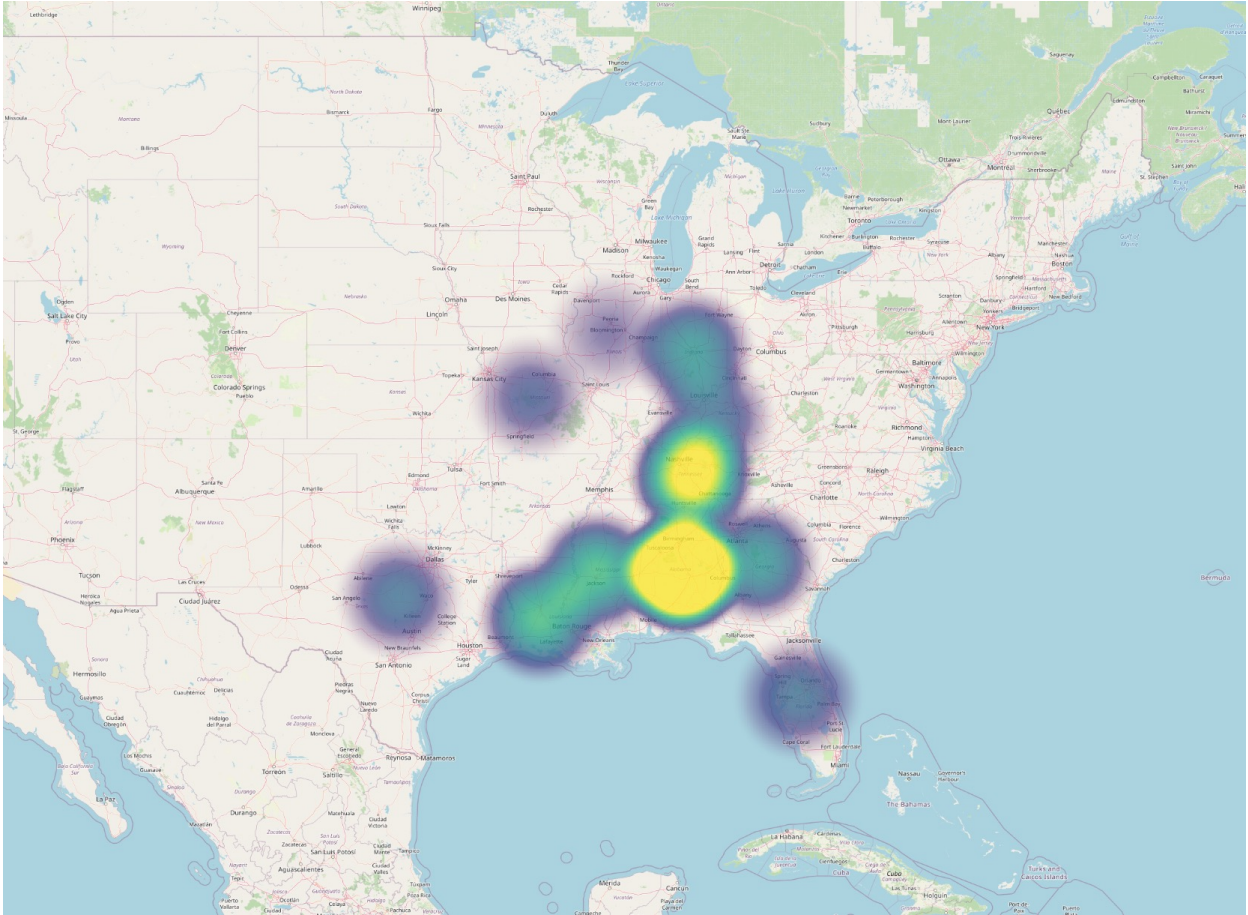
a / b indicate statistically significant differences at the 95% level.

# Travel Party Characteristics – New Visitors

- Looking at demographics by repeat and new visitors confirms that much of the return to more affluent visitors overall is due to repeat visitors.
- It may be that these consumers are returning to GS/OB after the strangeness of the pandemic and therefore represent a larger share of Fall 2022 visitors.
- Or it could also be that the new visitors from 2020 and 2021, many of whom were not accustomed to leisure travel at all, have stopped coming now that federal incentives have gone away.

| Summer demographic profile of new visitors |                            | Repeat visitors |           |           | New visitors |           |           |
|--|----------------------------|-----------------|-----------|-----------|--------------|-----------|-----------|
|  |                            | 2019            | 2021      | 2022      | 2019         | 2021      | 2022      |
| Age  | Average                    | 50              | 47        | 48        | 46           | 42        | 47        |
| Marital status                             | Married                    | 73%             | 71%       | 70%       | 63%          | 62%       | 65%       |
|  | Divorced/Separated         | 9%              | 11%       | 11%       | 9%           | 7%        | 8%        |
|  | Single/Never married       | 13%             | 3%        | 3%        | 24%          | 29%       | 5%        |
|  | Widowed                    | 4%              | 14%       | 16%       | 5%           | 2%        | 21%       |
| HH income                                  | Average                    | \$128,981       | \$123,063 | \$138,092 | \$121,495    | \$110,673 | \$116,917 |
| Education                                  | College grad+              | 66%             | 69%       | 65%       | 61%          | 64%       | 64%       |
| Occupation                                 | Executive/upper management | 18%             | 12%       | 18%       | 23%          | 22%       | 23%       |
|  | IT professional            | 8%              | 8%        | 14%       | 6%           | 15%       | 13%       |
|  | Educator                   | 6%              | 11%       | 10%       | 8%           | 9%        | 7%        |
|  | Healthcare                 |                 | 8%        | 7%        |              | 9%        | 10%       |
|  | Homemaker                  | 8%              | 13%       | 5%        | 10%          | 2%        | 5%        |
|  | Student                    | 1%              | 0%        | 1%        | 2%           | 2%        | 0%        |
|  | Small business owner       | 7%              | 6%        | 6%        | 4%           | 4%        | 5%        |
|  | Skilled trade/service      | 9%              | 7%        | 5%        | 17%          | 9%        | 11%       |
|  | Other                      | 20%             | 23%       | 17%       | 10%          | 11%       | 11%       |
|  | Retired                    | 22%             | 8%        | 13%       | 21%          | 15%       | 14%       |
|  | Not currently employed     | 2%              | 9%        | 4%        | 0%           | 4%        | 2%        |
| Ethnicity                                  | Caucasian/White            | 86%             | 88%       | 89%       | 68%          | 78%       | 85%       |
|  | African-American/Black     | 6%              | 8%        | 7%        | 15%          | 16%       | 13%       |
|  | Latino/Hispanic            | 5%              | 3%        | 8%        | 13%          | 4%        | 14%       |
|  | Asian                      | 4%              | 3%        | 3%        | 9%           | 2%        | 1%        |
|  | American Indian            | 3%              | 2%        | 0%        | 0%           | 0%        | 1%        |

# Travel Party Characteristics



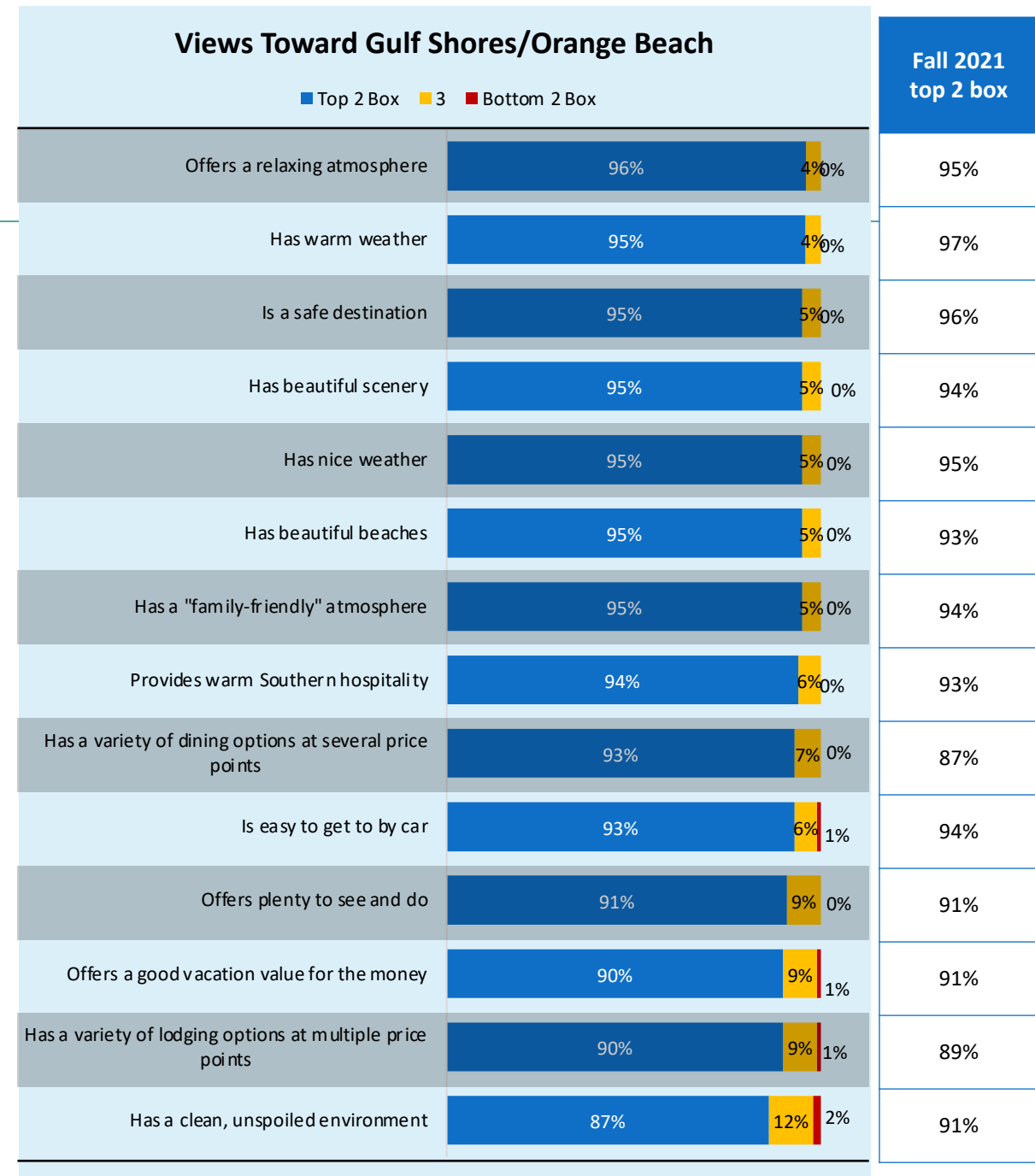
| Fall 2022   |     |
|-------------|-----|
| Alabama     | 32% |
| Tennessee   | 14% |
| Louisiana   | 8%  |
| Mississippi | 8%  |
| Georgia     | 6%  |
| Indiana     | 6%  |
| Kentucky    | 4%  |
| Texas       | 4%  |
| Florida     | 4%  |
| Missouri    | 3%  |

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

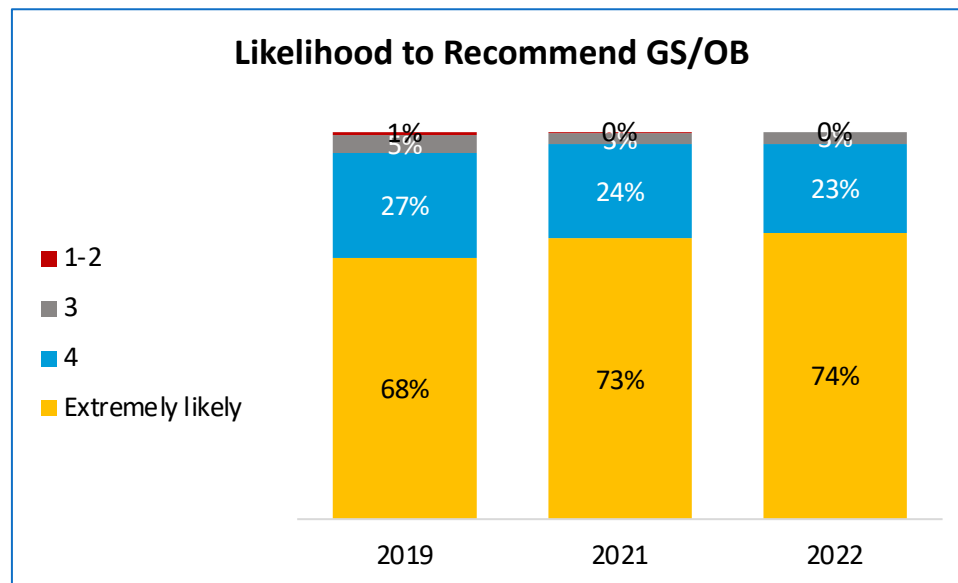
- Agreement has remained the highest for relaxing atmosphere, scenery, and safety.
- Perception of GS/OB as a place with a clean/unspoiled environment has declined slightly to the last position, although nearly 9-in-10 agree.
- Persons of the destination's dining options have improved markedly from last fall.

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 remains level from the past year, with three-quarters of visitors stating they are “extremely likely” to recommend GS/OB. This represents an improvement from even before the pandemic, which is a very positive result.



| How likely are you to recommend Gulf Shores/Orange Beach to your friends or family as a destination to visit for a leisure trip?<br>Summer visitors | 2019<br>Top 2 Box % | 2021<br>Top 2 Box % | 2022<br>Top 2 Box % |
|---|---------------------|---------------------|---------------------|
| Vacation rental/condo   | 96%                 | 95%                 | 96%                 |
| Hotel   | 94%                 | 99%                 | 97%                 |

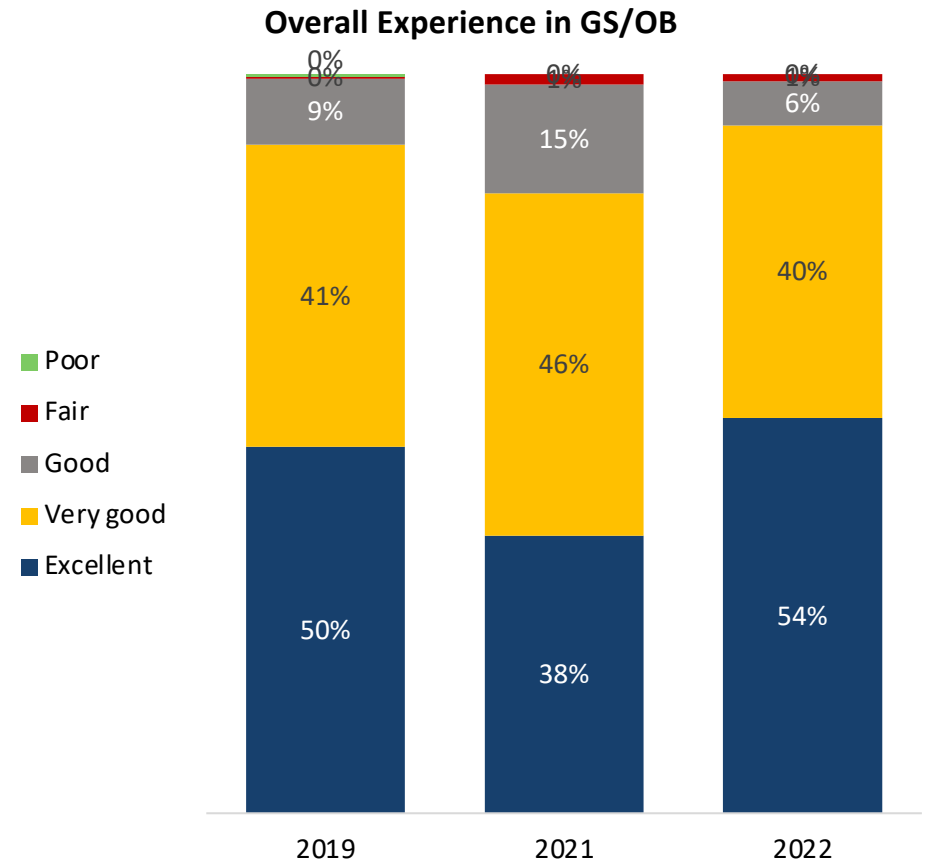
Condo/vacation rental 2019 n=206; 2021 n=152; 2022 n=139

Hotel/motel 2019 n=231; 2021 n=256; 2022 n=262

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

- The overall experience in GS/OB is back up to pre-pandemic levels, with more than half of visitors giving “excellent” ratings.

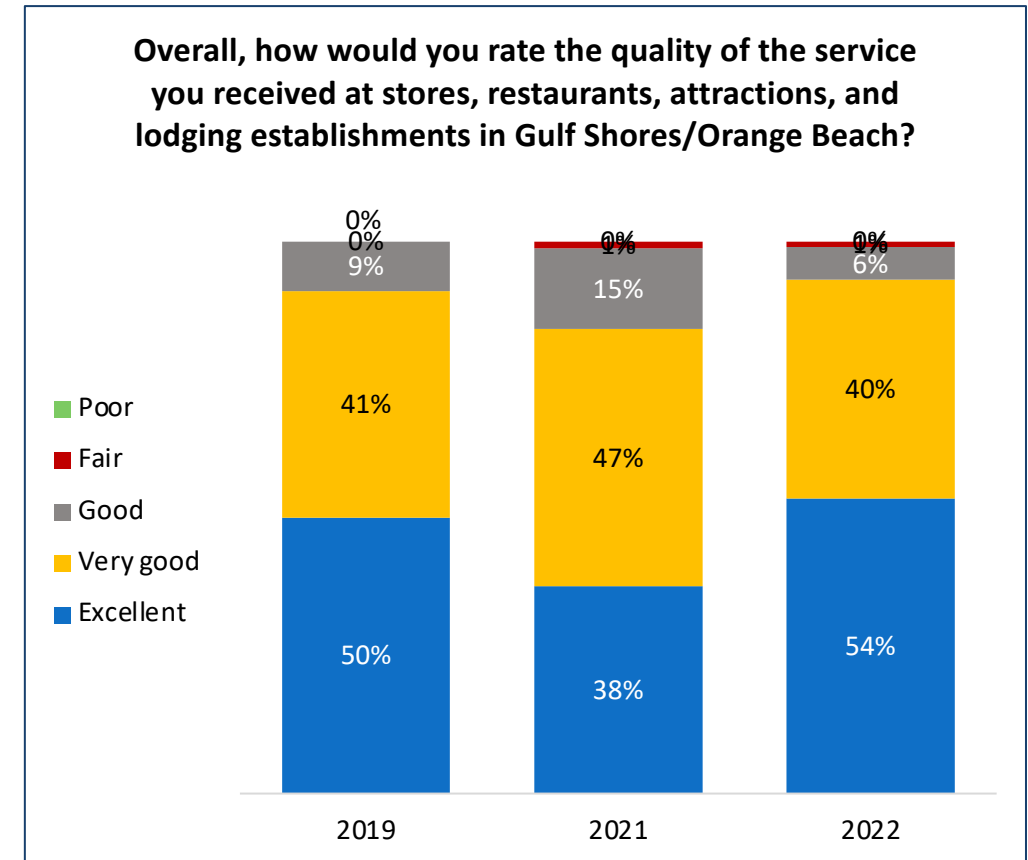


Question text: Thinking about your overall experience in Gulf Shores/Orange Beach during your trip, would you say it was...?



# Views Toward GS/OB & Trip Satisfaction

- Ratings of customer service has improved from Fall 2021, with the highest levels of “excellent” since 2019.
- Based on comments from visitors, staffing shortages continue to be an issue. However, since this is a nationwide occurrence, most consumers have grown accustomed to longer wait times in restaurants.
  - “I love the service but it was a little slow”
  - “Employees are not as friendly as they used to be.”
  - “It was the same as it is everywhere. Short staffed and longer waits, faulty meal accuracy.”
- Most visitors had positive comments.
  - “Everyone we encountered in the area was friendly and hospitable.”
  - “Enjoyed everything. Really friendly including pets”
  - “Everyone was very nice and knowledgeable about the area and were glad to visit with us.”

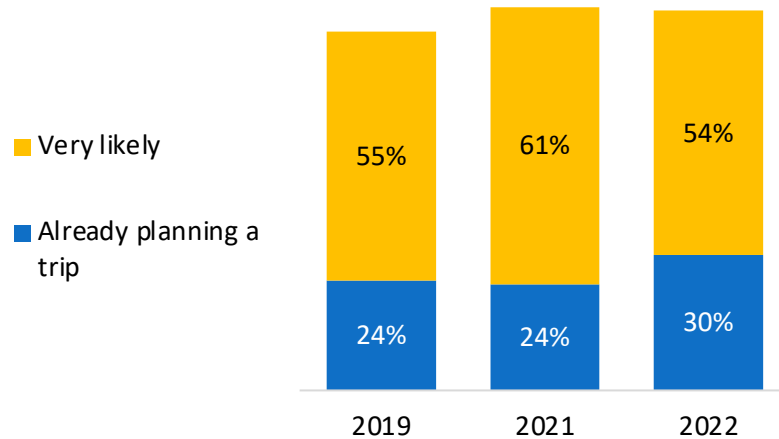


Question text: Overall, how would you rate the quality of the service you received at stores, restaurants, attractions, and lodging establishments in Gulf Shores/Orange Beach?  
Response options: Poor, Fair, Good, Very good, Excellent

# Views Toward GS/OB & Trip Satisfaction

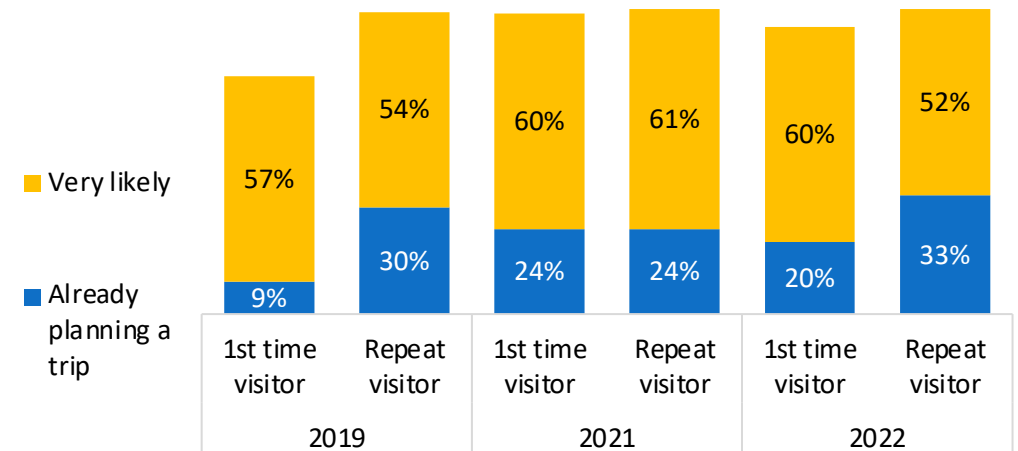
- The percentages of visitors who are very likely to return and already planning a trip remain high. Fall 2022 visitors are more likely to have already planned their return than in recent years.
- Compared to pre-pandemic, repeat visitors are as likely to already be planning their return. First-time visitors continue to be more likely to return as well, compared to 2019. This reflects the positive experience visitors are having at GS/OB.

**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    | 47% |
| I go there every year  | 25% |
| I've always wanted to go there                                       | 22% |
| I have family and friends there                                      | 12% |
| I was attending a planned event (tournament, meeting, wedding, etc.) | 10% |

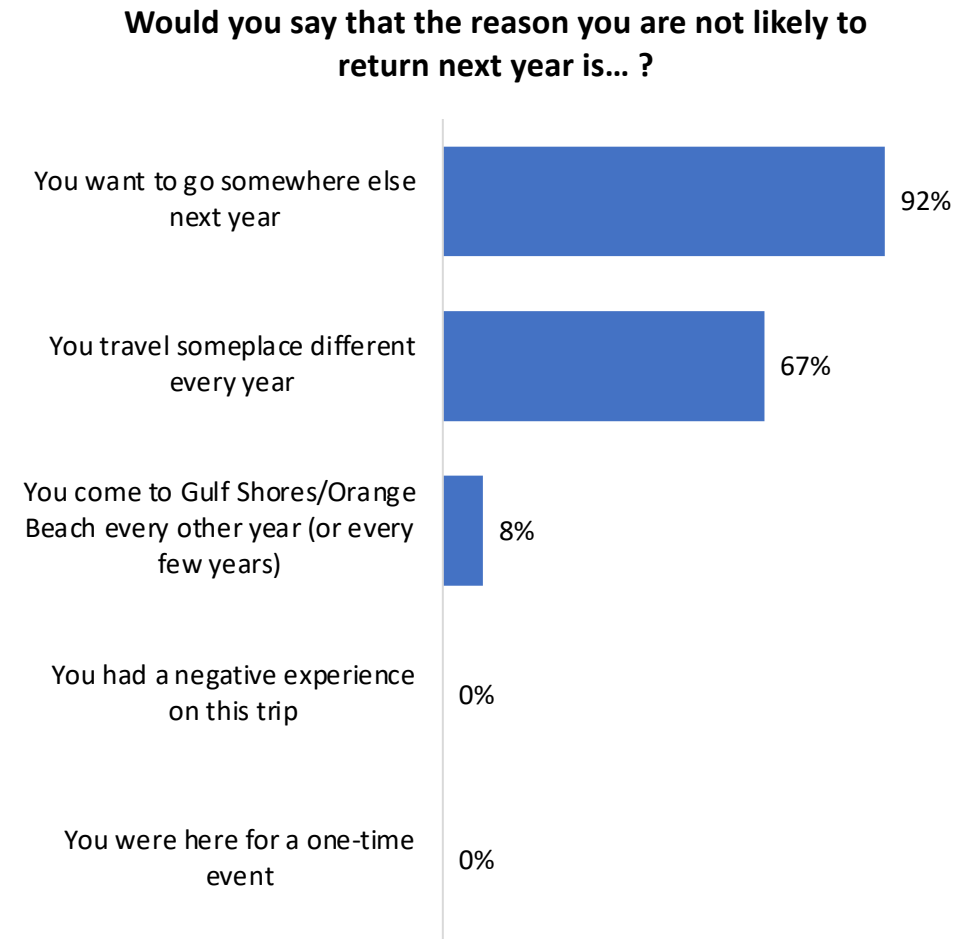
**Likelihood to Visit GS/OB in the Next Year**



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

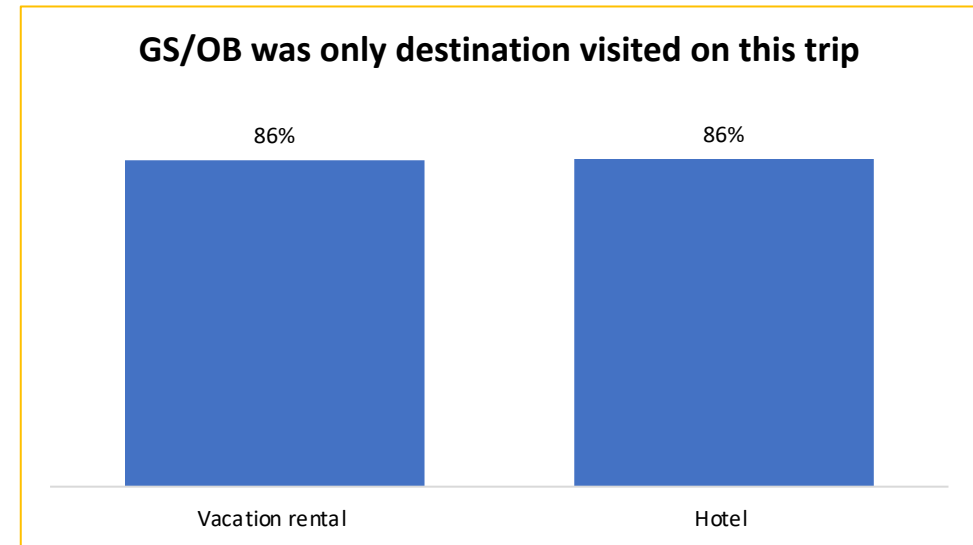
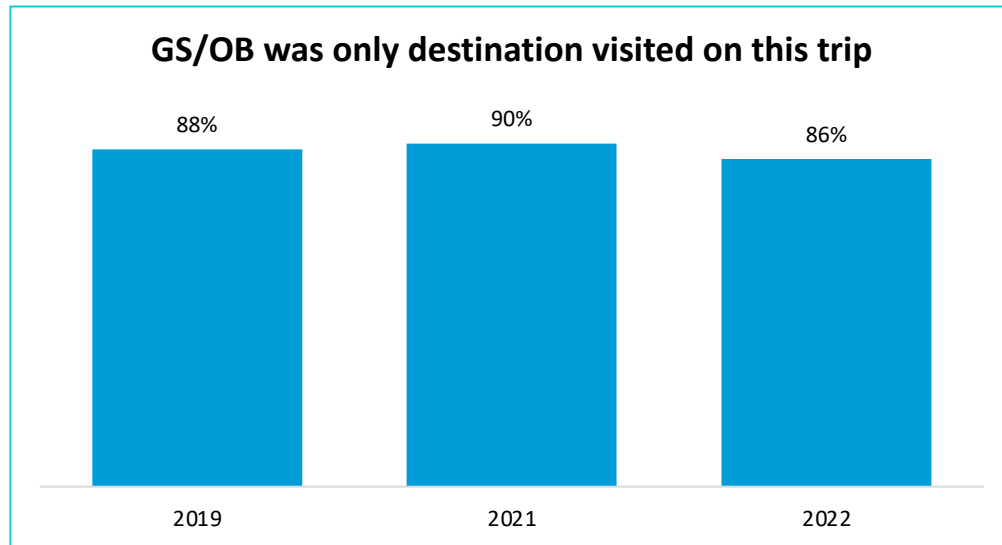
# Views Toward GS/OB & Trip Satisfaction

- Fewer than 5% of Fall 2022 visitors are unlikely to return to GS/OB in the next year.
- Of the visitors unlikely to return, most want to visit another destination next year, and change where they go on an annual basis. This is the case with leisure travelers in general. People typically don't choose *not* to go to a place; rather, they choose to go someplace else. And that is the case here.



# Destinations Visited

- Most Fall 2022 visitors visited only GS/OB on their trip.



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 – Fall 2022

# Welcome Center Impact

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- Just under a quarter of Fall 2022 visitors explored the welcome center. This number is slightly down from Fall 2021 but still up from 16% in Fall 2020.
- Welcome center visitors typically participate in more activities than visitors who do not stop at the welcome center.

| Fall 2022 visits        | No<br>Welcome<br>Center | Visited<br>Welcome<br>Center |
|-------------------------|-------------------------|------------------------------|
| Length of stay          | 4.4                     | 4.6                          |
| # of activities on trip | 6.3                     | 7.5                          |

# Impact on Spending

- Given that welcome center visitors typically engage in more activities on their trips, it is unsurprising that they also spend more on shopping, recreation/entertainment, and transportation within the Gulf Shores area.
- We see in all seasons and year over year, lodging decisions are decided ahead of time, so the welcome center has little opportunity to impact lodging spending. In similar fashion, length of stay is decided ahead of time, and this determines meal spending. Visitors to the welcome center are generally hotel stayers, thus the lodging spend is lower on average. And shorter stays meaning less food spending.
- Ultimately, the welcome centers impact visit spending where they can, and spur increased engagement with the destination.

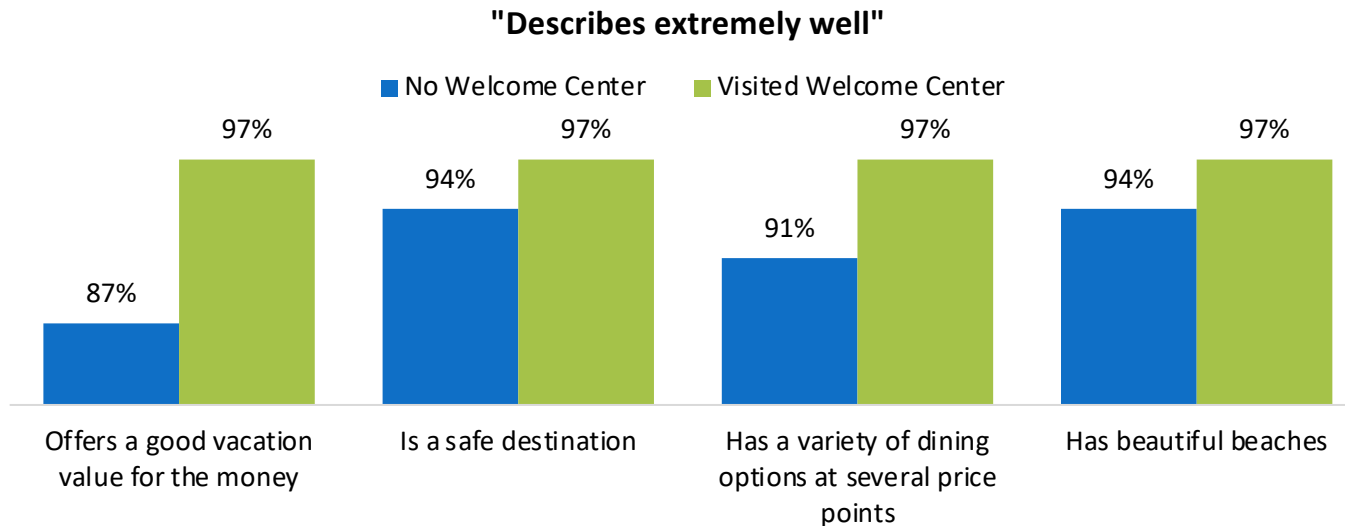
| Trip spending                     | No Welcome Center | Visited Welcome Center |
|-----------------------------------|-------------------|------------------------|
| Lodging                           | \$990             | \$546                  |
| Meals/food/groceries              | \$315             | \$190                  |
| Shopping                          | \$199             | \$261                  |
| Recreation or entertainment       | \$129             | \$163                  |
| Transportation within Gulf Shores | \$44              | \$121                  |
| Other                             | \$35              | \$106                  |
| <b>Total</b>                      | <b>\$1,712</b>    | <b>\$1,387</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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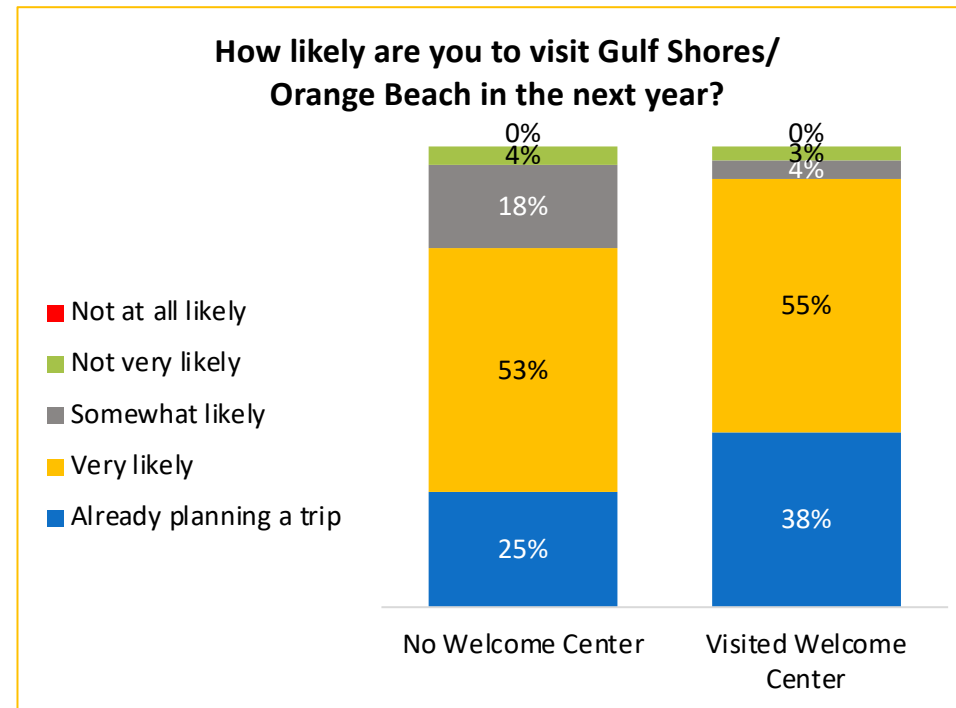
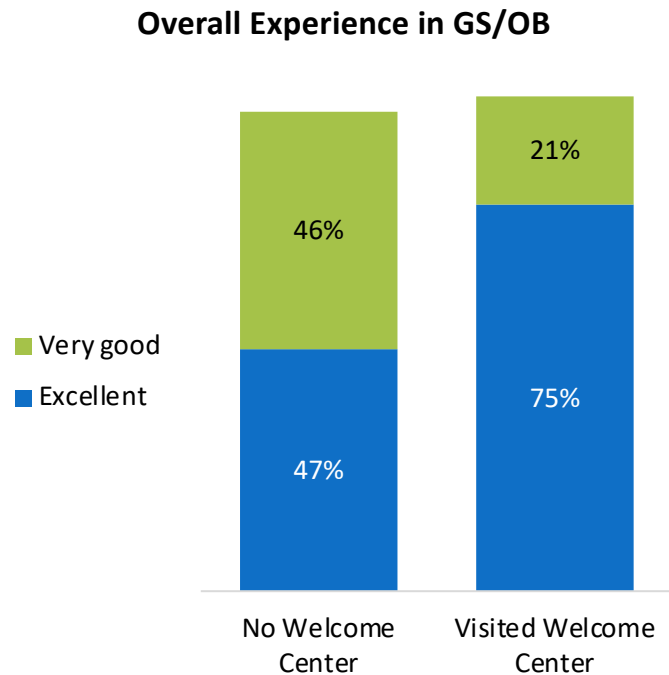
- Visitors to the welcome center have very high perceptions GS/OB overall.
- “Offers a good vacation value for the money,” in particular, rates 10 points higher among those who visit the welcome center.





# Impact on Experience and Intent to Return

- Three-quarters of welcome center visitors report an “excellent” experience on their trip. Great experiences and fuller itineraries result in greater proportions of visitors already planning their return to GS/OB.





# Appendix

Visitor Profile Research – Fall 2022

# Comparing Target to Other Travelers

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- Repeat visitation from day trips has picked up in Fall 2022 but not quite to the levels of Fall 2019.
- 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 FALL<br>Day trips | 2019 | 2021 | 2022 |
|------------------------------|------|------|------|
| Average # visits/year        | 3.6  | 2.1  | 2.6  |
| First time trips             | 31%  | 11%  | 11%  |

2019 day trip n=100; 2021 day trip n=104; 2022 day trip n=164

# Comparing Target to Other Travelers

| Began planning summer trip | 2019             |                     | 2021                 |                         | 2022                 |                         |
|----------------------------|------------------|---------------------|----------------------|-------------------------|----------------------|-------------------------|
|                            | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) | Target travelers (a) | Non-target Day trip (b) |
| < 1 week before trip       | 5%               | 46%                 | 16%                  | 58%                     | 4%                   | 61% <sup>a</sup>        |
| 1-2 weeks                  | 11%              | 14%                 | 15%                  | 20%                     | 6%                   | 29% <sup>a</sup>        |
| 3 weeks - 1 month          | 18%              | 14%                 | 18%                  | 17%                     | 19% <sup>b</sup>     | 7%                      |
| 2 - 3 months               | 32%              | 20%                 | 23%                  | 2%                      | 39% <sup>b</sup>     | 1%                      |
| 4-6 months                 | 18%              | 0%                  | 17%                  | 2%                      | 22% <sup>b</sup>     | 1%                      |
| 6+ months                  | 16%              | 7%                  | 11%                  | 1%                      | 11%                  | 1%                      |

| GS/OB is only destination visited on this trip | 2019             |                     | 2021                 |                         | 2022                 |                         |
|--|------------------|---------------------|----------------------|-------------------------|----------------------|-------------------------|
|  | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) | Target travelers (a) | Non-target Day trip (b) |
|  | 89%              | 90%                 | 90%                  | 87%                     | 86%                  | 76%                     |

2019 target n=437, day trip n=100; 2021 target n=408, day trip n=104; 2022 target n=401, day trip n=164

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             |                     | 2021                 |                         | 2022                 |                         |
|--|------------------|---------------------|----------------------|-------------------------|----------------------|-------------------------|
|  | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) | Target travelers (a) | Non-target Day trip (b) |
| Family or friends                          | 29%              | 24%                 | 30%                  | 27%                     | 31%                  | 29%                     |
| Gulf Shores & Orange Beach Tourism website | 19%              | 12%                 | 19%                  | 12%                     | 28% <sup>b</sup>     | 8%                      |
| Alabama's official tourism website         | 20%              | 8%                  | 9%                   | 9%                      | 8%                   | 4%                      |
| Social media                               | 16%              | 10%                 | 15%                  | 7%                      | 16%                  | 23%                     |
| Hotel websites                             | 15%              | 5%                  | 17%                  | 5%                      | 16%                  | 7%                      |
| Booking websites or apps                   | 10%              | 6%                  | 14%                  | 5%                      | 19% <sup>b</sup>     | 2%                      |
| Traveler review sites or apps              | 31%              | 8%                  | 21%                  | 5%                      | 20% <sup>b</sup>     | 9%                      |
| Local vacation rental company sites        | 5%               | 4%                  | 16%                  | 4%                      | 17% <sup>b</sup>     | 4%                      |
| Magazine and newspaper articles            | 6%               | 3%                  | 3%                   | 3%                      | 5%                   | 2%                      |
| Vacation home rental booking sites/apps    | 18%              | 4%                  | 45%                  | 3%                      | 34% <sup>b</sup>     | 4%                      |
| Travel blogs                               | 20%              | 9%                  | 5%                   | 1%                      | 8%                   | 10%                     |
| Travel/visitor guide                       | 14%              | 8%                  | 8%                   | 1%                      | 11% <sup>b</sup>     | 4%                      |
| Travel advice websites or apps             | 23%              | 7%                  | 14%                  | 1%                      | 14%                  | 11%                     |

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 target n=437, day trip n=100;  
2021 target n=408, day trip n=104 ;  
2022 target n=401, day trip n=164

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

# Comparing Target to Other Travelers

| Children on trip         | 2019             |                     | 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 | 44%              | 26%                 | 47%              | 20%                 | 40% <sup>b</sup>     | 26%                     |
| Of trips with children:  |                  |                     |                  |                     |                      |                         |
| < 6 years old            | 50%              | 42%                 | 53%              | 38%                 | 39%                  | 43%                     |
| 6-11 years old           | 50%              | 47%                 | 56%              | 45%                 | 49%                  | 83% <sup>a</sup>        |
| 12-17 years old          | 47%              | 26%                 | 40%              | 62%                 | 60% <sup>b</sup>     | 27%                     |

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             |                     | 2021                 |                         | 2022                 |                         |
|-------------------------|------------------|---------------------|----------------------|-------------------------|----------------------|-------------------------|
|                         | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) | Target travelers (a) | Non-target Day trip (b) |
| Automobile              | 83%              | 88%                 | 97%                  | 97%                     | 88%                  | 80%                     |
| Bus                     | 14%              | 9%                  | 1%                   | 3%                      | 1%                   | 1%                      |
| Airplane                | 1%               | 2%                  | 2%                   | 0%                      | 8%                   | 18% <sup>a</sup>        |
| Other                   | 1%               | 2%                  | 0%                   | 0%                      | 3%                   | 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 target n=437, day trip n=100;  
 2021 target n=408, day trip n=104;  
 2022 target n=401, day trip n=164

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

# Comparing Target to Other Travelers

|                   | 2019             |                     | 2021                 |                         | 2022             |                     |
|-------------------|------------------|---------------------|----------------------|-------------------------|------------------|---------------------|
|                   | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) | Target travelers | Non-target Day trip |
| Travel party size |                  |                     | 4.5                  | 2.7                     | 3.9 <sup>b</sup> | 2.6                 |

| Trip spending                 | 2019             |                     | 2021                 |                         | 2022               |                     |
|-------------------------------|------------------|---------------------|----------------------|-------------------------|--------------------|---------------------|
|                               | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) | Target travelers   | Non-target Day trip |
| Lodging                       | \$812            | \$ -                | \$943                | \$-                     | \$959              | \$-                 |
| Meals/food/groceries          | \$333            | \$109               | \$401                | \$84                    | \$416 <sup>b</sup> | \$116               |
| Shopping                      | \$260            | \$124               | \$211                | \$103                   | \$272 <sup>b</sup> | \$166               |
| Recreation or entertainment   | \$143            | \$74                | \$155                | \$29                    | \$175 <sup>b</sup> | \$43                |
| Transportation in Gulf Shores | \$53             | \$56                | \$50                 | \$30                    | \$75 <sup>b</sup>  | \$47                |
| Other                         | \$37             | \$6                 | \$52                 | \$38                    | \$80 <sup>b</sup>  | \$21                |
| TOTAL                         | \$1,638          | \$369               | \$1,812              | \$284                   | \$1,978            | \$393               |
| Per person spending           | \$388            | \$166               | \$405                | \$107                   | \$447              | \$151               |

2019 target n=437, day trip n=100;  
 2021 target n=408, day trip n=104  
 2022 target n=401, day trip n=164

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             |                     | 2021                 |                         | 2022                   |                     |
|----------------|----------------------|------------------|---------------------|----------------------|-------------------------|------------------------|---------------------|
|                |                      | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) | Target travelers       | Non-target Day trip |
| Age            | Average              | 48               | 59                  | 44                   | 51                      | 48                     | 48                  |
| Marital status | Married              | 72%              | 62%                 | 78%                  | 83%                     | 69%                    | 75%                 |
|                | Divorced/Separated   | 8%               | 13%                 | 7%                   | 9%                      | 10%                    | 8%                  |
|                | Widowed              | 5%               | 4%                  | 2%                   | 4%                      | 3%                     | 2%                  |
|                | Single/Never married | 16%              | 20%                 | 13%                  | 4%                      | 18%                    | 15%                 |
| HH income      | Average              | \$129,417        | \$93,011            | \$119,879            | \$114,541               | \$132,685 <sup>b</sup> | \$95,323            |

2019 target n=437, day trip n=100; 2021 target n=408, day trip n=104; 2022 target n=401, day trip n=164

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             |                     | 2021                 |                         | 2022             |                     |
|---|------------------|---------------------|----------------------|-------------------------|------------------|---------------------|
|   | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) | Target travelers | Non-target Day trip |
| Is easy to get to by car                                  | 94%              | 93%                 | 94%                  | 94%                     | 93%              | 92%                 |
| Offers plenty to see and do                               | 95%              | 93%                 | 91%                  | 75%                     | 91%              | 90%                 |
| Has beautiful scenery                                     | 95%              | 91%                 | 93%                  | 89%                     | 95%              | 92%                 |
| Has a "family-friendly" atmosphere                        | 91%              | 91%                 | 94%                  | 92%                     | 95%              | 88%                 |
| Is a safe destination                                     | 95%              | 91%                 | 96%                  | 89%                     | 95% <sup>b</sup> | 85%                 |
| Provides warm Southern hospitality                        | 93%              | 89%                 | 93%                  | 89%                     | 94%              | 88%                 |
| Has warm weather  | 95%              | 87%                 | 97%                  | 92%                     | 95%              | 94%                 |
| Has a variety of lodging options at multiple price points | 95%              | 87%                 | 89%                  | 94%                     | 90%              | 81%                 |
| Has beautiful beaches                                     | 93%              | 87%                 | 93%                  | 89%                     | 95%              | 94%                 |
| Has nice weather  | 94%              | 87%                 | 87%                  | 92%                     | 95%              | 94%                 |
| Has a variety of dining options at several price points   | 90%              | 87%                 | 87%                  | 86%                     | 93%              | 92%                 |
| Offers a relaxing atmosphere                              | 92%              | 84%                 | 95%                  | 83%                     | 96%              | 85%                 |
| Has a clean, unspoiled environment                        | 89%              | 78%                 | 91%                  | 72%                     | 87%              | 79%                 |
| Offers a good vacation value for the money                | 93%              | 78%                 | 91%                  | 78%                     | 90%              | 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 target n=437, day trip n=100;  
2021 target n=408, day trip n=104;  
2022 target n=401, day trip n=164

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

# Comparing Target to Other Travelers

| Overall experience      | 2019             |                     | 2021                 |                         | 2022             |                     |
|-------------------------|------------------|---------------------|----------------------|-------------------------|------------------|---------------------|
|                         | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) | Target travelers | Non-target Day trip |
| <b>Top 2 Box Rating</b> | <b>91%</b>       | <b>84%</b>          | <b>84%</b>           | <b>78%</b>              | <b>94%</b>       | <b>83%</b>          |
| 5 (Excellent)           | 50%              | 58%                 | 38%                  | 46%                     | 59%              | 51%                 |
| 4 (Very good)           | 41%              | 26%                 | 46%                  | 32%                     | 35%              | 32%                 |
| 3 (Good)                | 9%               | 13%                 | 15%                  | 18%                     | 5%               | 17% <sup>a</sup>    |
| 2 (Fair)                | 0%               | 2% <sup>a</sup>     | 1%                   | 4%                      | 1%               | 0%                  |
| 1 (Poor)                | 0%               | 1%                  | 0%                   | 0%                      | 0%               | 0%                  |

| Likelihood to recommend | 2019             |                     | 2021                 |                         | 2022             |                     |
|-------------------------|------------------|---------------------|----------------------|-------------------------|------------------|---------------------|
|                         | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) | Target travelers | Non-target Day trip |
| <b>Top 2 Box Rating</b> | <b>95%</b>       | <b>84%</b>          | <b>97%</b>           | <b>75%</b>              | <b>96%</b>       | <b>90%</b>          |
| 5 (Extremely likely)    | 70%              | 60%                 | 73%                  | 47%                     | 74%              | 73%                 |
| 4                       | 24%              | 24%                 | 25%                  | 28%                     | 23%              | 17%                 |
| 3                       | 5%               | 9%                  | 3%                   | 17%                     | 3%               | 6% <sup>a</sup>     |
| 2                       | 0%               | 2%                  | 0%                   | 8%                      | 0%               | 4%                  |
| 1 (Not at all likely)   | 0%               | 4%                  | 0%                   | 0%                      | 0%               | 0%                  |

2019 target n=437, day trip n=100; 2021 target n=408, day trip n=104; 2022 target n=401, day trip n=164

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             |                     | 2021                 |                         | 2022             |                     |
|--|------------------|---------------------|----------------------|-------------------------|------------------|---------------------|
|  | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) | Target travelers | Non-target Day trip |
| <b>Likely to return (top 2 box)</b>        | <b>82%</b>       | <b>78%</b>          | <b>85%</b>           | <b>69%</b>              | <b>83%</b>       | <b>77%</b>          |
| 5 (Already planning a trip)                | 28%              | 18%                 | 24%                  | 17%                     | 30%              | 19%                 |
| 4 (Very likely)                            | 54%              | 60%                 | 61%                  | 53%                     | 54%              | 58%                 |
| 3 (Somewhat likely)                        | 14%              | 18%                 | 12%                  | 22%                     | 13%              | 19%                 |
| 2 (Not very likely)                        | 3%               | 2%                  | 3%                   | 6%                      | 3%               | 2%                  |
| 1 (Not at all likely)                      | 1%               | 1%                  | 0%                   | 3%                      | 0%               | 2%                  |

| During which season(s) would you be most likely to visit (of those likely to visit) | 2019             |                     | 2021                 |                         | 2022             |                     |
|---|------------------|---------------------|----------------------|-------------------------|------------------|---------------------|
|   | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) | Target travelers | Non-target Day trip |
| Spring  | 44%              | 70%                 | 39%                  | 50%                     | 37%              | 59%                 |
| Summer  | 41%              | 33%                 | 55%                  | 61%                     | 51%              | 63% <sup>a</sup>    |
| Fall  | 65%              | 56%                 | 44%                  | 45%                     | 66%              | 74%                 |
| Winter  | 16%              | 21%                 | 14%                  | 16%                     | 11%              | 37% <sup>a</sup>    |

2019 target n=437, day trip n=100; 2021 target n=408, day trip n=104; 2022 target n=401, day trip n=164

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             |                     | 2021                 |                         | 2022             |                     |
|----------------------|------------------|---------------------|----------------------|-------------------------|------------------|---------------------|
|                      | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) | Target travelers | Non-target Day trip |
| Alabama              | 44%              | 42%                 | 30%                  | 26%                     | 32%              | 50% <sup>a</sup>    |
| Tennessee            | 8%               | 0%                  | 14%                  | 9%                      | 14% <sup>b</sup> | 2%                  |
| Louisiana            | 7%               | 2%                  | 11%                  | 15%                     | 8%               | 19% <sup>a</sup>    |
| Mississippi          | 7%               | 7%                  | 6%                   | 4%                      | 8% <sup>b</sup>  | 2%                  |
| Georgia              | 5%               | 2%                  | 24%                  | 13%                     | 6% <sup>b</sup>  | 0%                  |
| Indiana              | 3%               | 0%                  | 0%                   | 0%                      | 6% <sup>b</sup>  | 2%                  |
| Florida              | 7%               | 36%                 | 7%                   | 34%                     | 4%               | 10% <sup>a</sup>    |
| Texas                | 3%               | 7%                  | 0%                   | 0%                      | 4%               | 13% <sup>a</sup>    |
| Missouri             | 2%               | 0%                  | 0%                   | 0%                      | 3%               | 0%                  |
| Illinois             | 1%               | 2%                  | 0%                   | 0%                      | 2%               | 0%                  |
| Arkansas             | 2%               | 2%                  | 1%                   | 0%                      | 2%               | 0%                  |
| Michigan             | 1%               | 0%                  | 0%                   | 0%                      | 1%               | 0%                  |
| Wisconsin            | 0%               | 0%                  | 0%                   | 0%                      | 0%               | 0%                  |

2019 target n=437, day trip n=100; 2021 target n=408, day trip n=104; 2022 target n=401, day trip n=164

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

# Comparing Non-Target Trips Year-Over-Year

| General activities (non-target trips)           | 2019             |                     | 2021                 |                         | 2022             |                     |
|---|------------------|---------------------|----------------------|-------------------------|------------------|---------------------|
|   | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) | Target travelers | Non-target Day trip |
| Dining out                                      | 67%              | 39%                 | 62%                  | 46%                     | 66% <sup>b</sup> | 27%                 |
| Shopping  | 47%              | 29%                 | 48%                  | 28%                     | 43% <sup>b</sup> | 25%                 |
| Beaches   | 69%              | 30%                 | 71%                  | 20%                     | 75% <sup>b</sup> | 10%                 |
| Relaxing  | 66%              | 25%                 | 54%                  | 18%                     | 62% <sup>b</sup> | 18%                 |
| Sightseeing                                     | 29%              | 14%                 | 25%                  | 12%                     | 32% <sup>b</sup> | 11%                 |
| Visiting friends/relatives who live in the area | 13%              | 8%                  | 8%                   | 12%                     | 12%              | 8%                  |
| Fishing   | 8%               | 4%                  | 10%                  | 11%                     | 12%              | 7%                  |
| Photography                                     | 11%              | 6%                  | 15%                  | 8%                      | 12%              | 12%                 |
| Historical sites                                | 13%              | 6%                  | 9%                   | 7%                      | 11%              | 8%                  |
| Swimming  | 37%              | 4%                  | 41%                  | 7%                      | 36%              | 9%                  |
| Boating or sailing                              | 6%               | 5%                  | 11%                  | 4%                      | 8%               | 4%                  |
| Family/friends reunion                          | 7%               | 4%                  | 9%                   | 4%                      | 12%              | 12%                 |
| Hiking on trails                                | 8%               | 4%                  | 9%                   | 4%                      | 11%              | 11%                 |
| Shelling  | 16%              | 8%                  | 12%                  | 4%                      | 16% <sup>b</sup> | 4%                  |
| Watching wildlife                               | 15%              | 8%                  | 9%                   | 4%                      | 16%              | 11%                 |
| Exercise/working out                            | 11%              | 7%                  | 14%                  | 3%                      | 11%              | 8%                  |
| Bicycle riding                                  | 5%               | 4%                  | 7%                   | 3%                      | 7%               | 7%                  |
| Birdwatching                                    | 5%               | 4%                  | 6%                   | 3%                      | 5%               | 4%                  |
| Dolphin tour                                    | 11%              | 4%                  | 12%                  | 1%                      | 6%               | 4%                  |
| Festivals or special events (non-sports events) | 10%              | 6%                  | 4%                   | 1%                      | 5%               | 5%                  |
| Sporting events                                 | 6%               | 4%                  | 5%                   | 1%                      | 3%               | 7% <sup>a</sup>     |
| Tennis  | 2%               | 4%                  | 4%                   | 1%                      | 2%               | 6%                  |
| Visiting a spa                                  | 6%               | 2%                  | 6%                   | 1%                      | 5%               | 10%                 |
| Scuba diving/snorkeling                         | 4%               | 3%                  | 4%                   | 1%                      | 2%               | 4%                  |
| Concerts and nightlife                          | 11%              | 7%                  | 8%                   | 0%                      | 7%               | 5%                  |
| Golfing   | 9%               | 2%                  | 9%                   | 0%                      | 6%               | 8%                  |
| Kayaking/canoeing/paddle boarding               | 7%               | 1%                  | 4%                   | 0%                      | 3%               | 2%                  |
| Parasailing/jet skiing                          | 4%               | 2%                  | 8%                   | 0%                      | 4%               | 6%                  |

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 target n=437, day trip n=100;  
2021 target n=408, day trip n=104;  
2022 target n=401, day trip n=164

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

# Comparing Non-Target Trips Year-Over-Year

| Specific attractions (non-target trips)   | 2019             |                     | 2021                 |                         | 2022             |                     |
|---|------------------|---------------------|----------------------|-------------------------|------------------|---------------------|
|   | Target travelers | Non-target Day trip | Target travelers (a) | Non-target Day trip (b) | Target travelers | Non-target Day trip |
| Adventure Island                          | 9%               | 4%                  | 1%                   | 6%                      | 5%               | 5%                  |
| Alabama Gulf Coast Zoo                    | 8%               | 5%                  | 3%                   | 6%                      | 8%               | 6%                  |
| Alabama's Coastal Connection Scenic Byway | 8%               | 3%                  | 4%                   | 9%                      | 13% <sup>b</sup> | 4%                  |
| Battleship USS Alabama                    | 10%              | 6%                  | 1%                   | 9%                      | 7%               | 5%                  |
| Bellingrath Gardens                       | 4%               | 2%                  | 4%                   | 5%                      | 4%               | 2%                  |
| Bon Secour National Wildlife Refuge       | 6%               | 4%                  | 4%                   | 4%                      | 4%               | 4%                  |
| Dauphin Island                            | 11%              | 7%                  | 3%                   | 2%                      | 12%              | 7%                  |
| Civil War History Trail                   |                  |                     | 1%                   | 4%                      | 2%               | 5%                  |
| Coastal Birding Trail                     |                  |                     | 8%                   | 12%                     | 3%               | 4%                  |
| Fort Morgan Historic Site                 | 13%              | 3%                  | 5%                   | 12%                     | 12%              | 7%                  |
| Gulf State Park                           | 20%              | 6%                  | 4%                   | 18%                     | 23% <sup>b</sup> | 5%                  |
| Hugh S. Branyon Backcountry Trail         | 2%               | 4%                  | 3%                   | 4%                      | 1%               | 3% <sup>a</sup>     |
| National Naval Aviation Museum            | 8%               | 7%                  | 4%                   | 6%                      | 6%               | 4%                  |
| OWA Park                                  | 3%               | 5%                  | 9%                   | 8%                      | 5%               | 5%                  |
| Tanger Outlets                            | 29%              | 22%                 | 22%                  | 34%                     | 27% <sup>b</sup> | 15%                 |
| The Track                                 | 5%               | 2%                  | 0%                   | 10%                     | 6%               | 6%                  |
| The Wharf                                 | 18%              | 4%                  | 9%                   | 17%                     | 24% <sup>b</sup> | 8%                  |
| Waterville                                | 5%               | 1%                  | 0%                   | 3%                      | 2%               | 5%                  |

2019 target n=437, day trip n=100; 2021 target n=408, day trip n=104; 2022 target n=401, day trip n=164

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.