



**GULF SHORES &  
ORANGE BEACH  
TOURISM**

Alabama's White-Sand Beaches

# Visitor Profile Research

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Spring 2021

Strategic Marketing & Research Insights, LLC

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# Introduction

Visitor Profile Research – Spring 2021

# 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 has offered 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 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.
- The objectives of the current research on 2021 visitors include understanding what visitors think of the area, what drives them to visit, what their experience is in the area (tracking customer service ratings in particular), trip satisfaction and characteristics, and travel planning. The methodology is largely online and is outlined in detail in the following section.
- This report is the first of four seasonal reports for 2021.

# Research Objectives

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Gather information on spring 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 2018 and 2019



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 spring 2021 (March through May).
- 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 remains at 80% condo/vacation rentals and 20% hotel stays. Hotel inventory has grown 18% YOY; condo/vacation rental inventory has grown by 1%.
- Surveys were conducted in the markets where UberMedia’s mobile data indicated were home markets for devices that spent time in the Gulf Shores/Orange Beach area during the spring months. More detail is included on the following slide.

Number of trips represented in the data	Spring 2021
Target trips (stayed 1-30 nights in paid accommodations)	422
Non-target trips (visited but did not stay overnight)	113



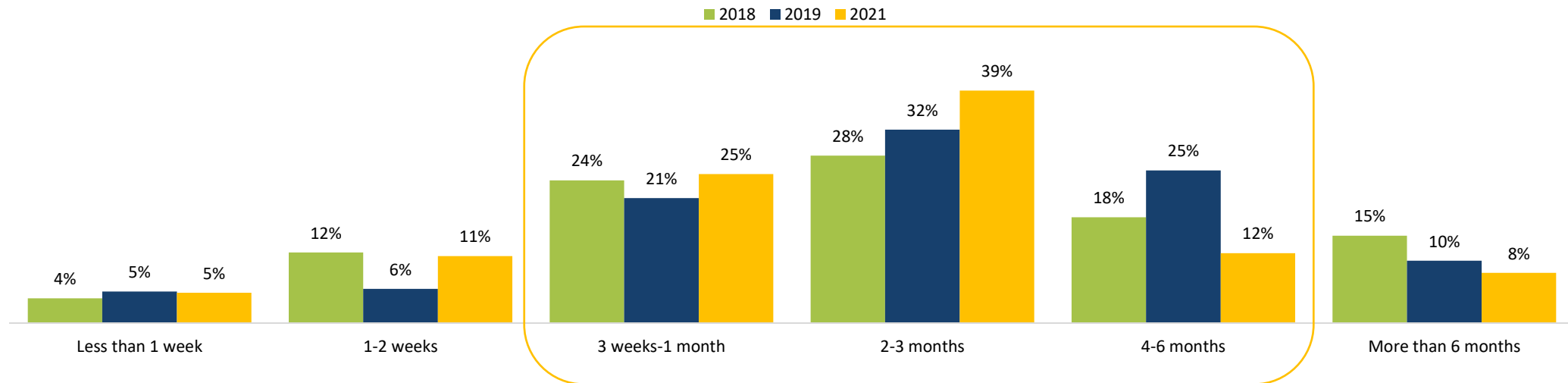
# Detailed Findings

Visitor Profile Research – Spring 2021

# Travel Planning

- Most (64%) of spring trips are planned between 3 weeks and 3 months ahead of time. Only 1-in-5 spring trips are planned more than 4 months in advance.
- The planning window has shortened compared to pre-pandemic levels, but few are last-minute trips.

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



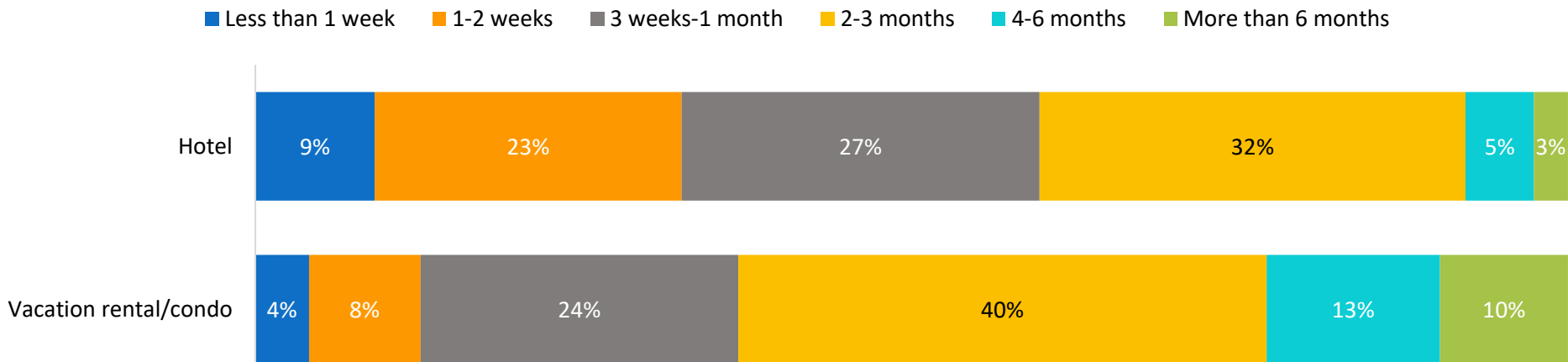
Question text: How far in advance did you begin planning your trip to Gulf Shores/Orange Beach? Response options as shown in graph above.



# Travel Planning – Hotel vs. Condo Rental

- We see the shortening of the planning horizon in both hotel and vacation rental stayers. Compared to spring 2019, the shares of those at either end of the spectrum – planning a GS/OB trip in under 2 weeks or over 6 months – are actually stable. However, in 2019, 30% of spring condo stays were planned 4-6 months in advance, and 38% of hotel stays were planned between 3 and 4 weeks ahead of travel.

**Trip Planning Horizon by Lodging Type**



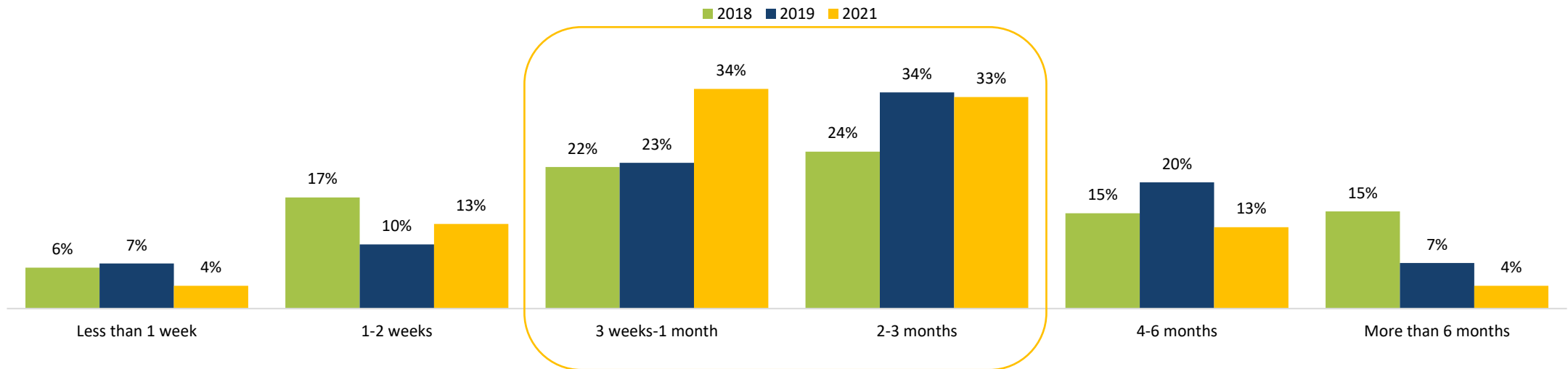
Vacation rental/condo n=156 (a); Hotel/motel n=266 (b); a / b indicate statistically significant differences at the 95% level.

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

- With a shorter planning window, we are also seeing a shorter booking window.
- Two-thirds (67%) of spring lodging was booked from 3 weeks to 3 months ahead of GS/OB visitation, up 10 points from spring 2019.

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

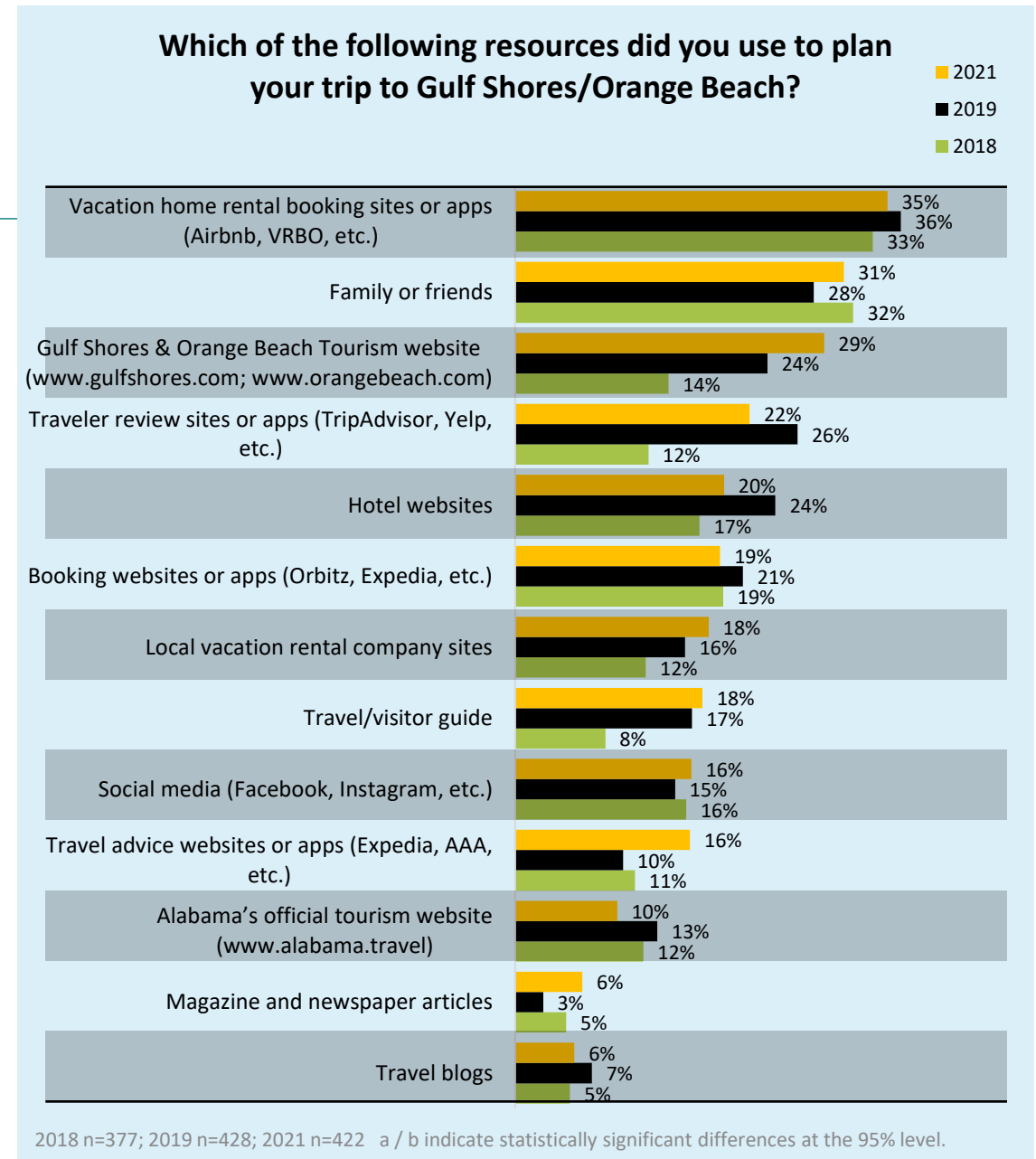


Question text: How far in advance did you book your lodging in Gulf Shores/Orange Beach? Response options as shown in graph above.

# Travel Planning

- We see an increase in reliance on local resources for trip planning, including the Gulf Shores & Orange Beach Tourism website, family and friends, and local vacation rental company sites which would have been expected to have the most current information in a time period of uncertainty.
- Use of national travel booking and review sites dropped slightly.

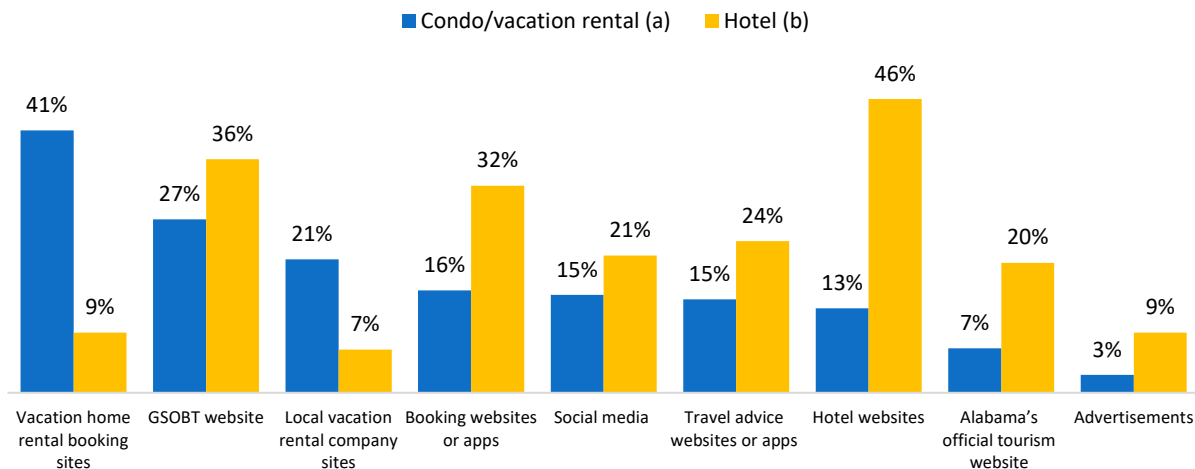
Question text: Which of the following resources did you use to plan your trip to Gulf Shores/Orange Beach? Response options as shown in graph.



# Travel Planning – Hotel vs. Condo Rental

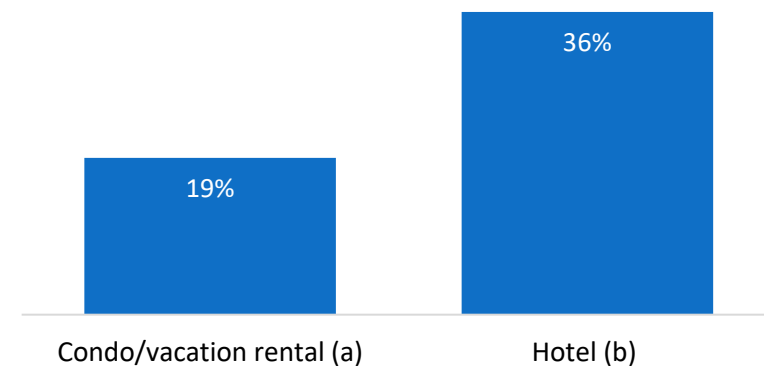
- As we've seen in prior spring measures, hotel users are more likely to visit a GS/OB Welcome Center and more likely to use travel advice and booking websites, which is consistent with lower familiarity with the destination.
- Hotel stayers also drove increased usage of the GSOBT website, while condo stayers continue to rely on vacation rental sites.
- In spring 2021, 37% of those who visited a welcome center said they visited the Welcome Center booth at an area event or booth at the Wharf.

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



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

**Visited the Gulf Shores/Orange Beach Welcome Center**



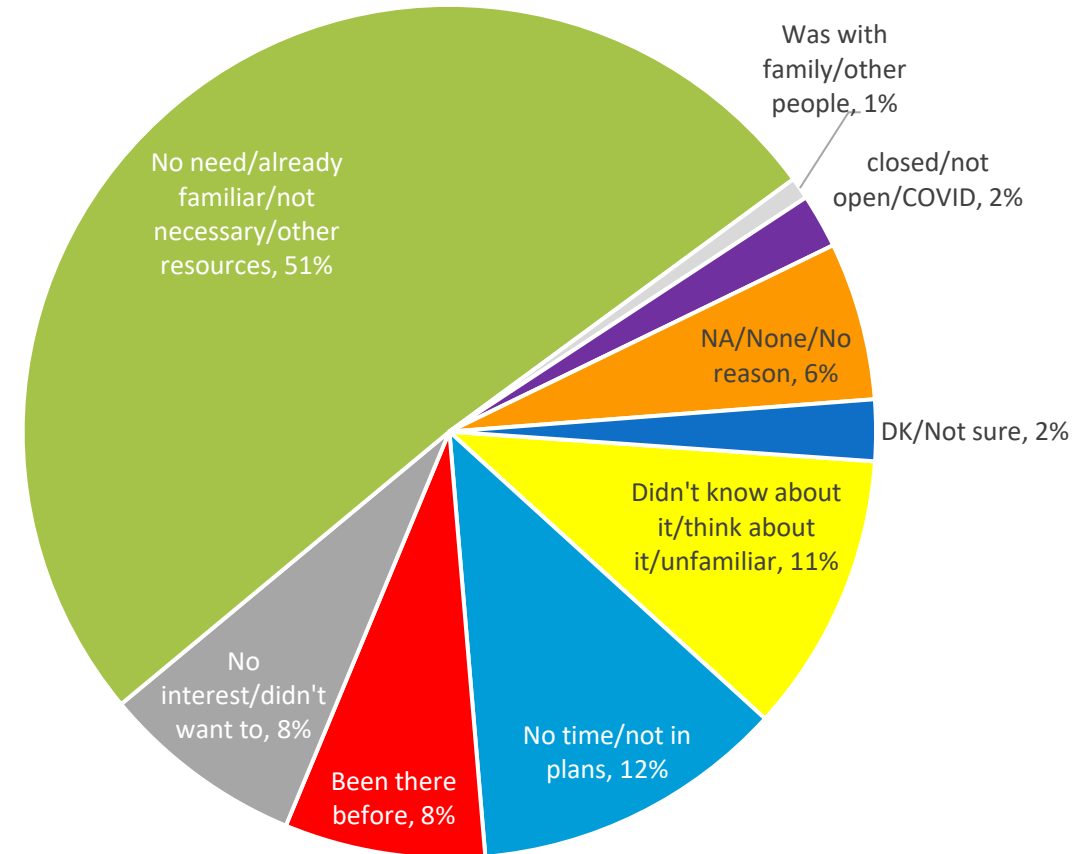
Vacation rental/condo n=156 (a); Hotel/motel n=266 (b); a / b indicate statistically significant differences at the 95% level.

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

# Travel Planning

- The most common reason for not visiting a GSOBT welcome center is already being familiar with the destination. We have seen this result across seasons.
- Among other non-welcome-center visitors, many of the reasons point to a lack of awareness of the benefits of the centers.

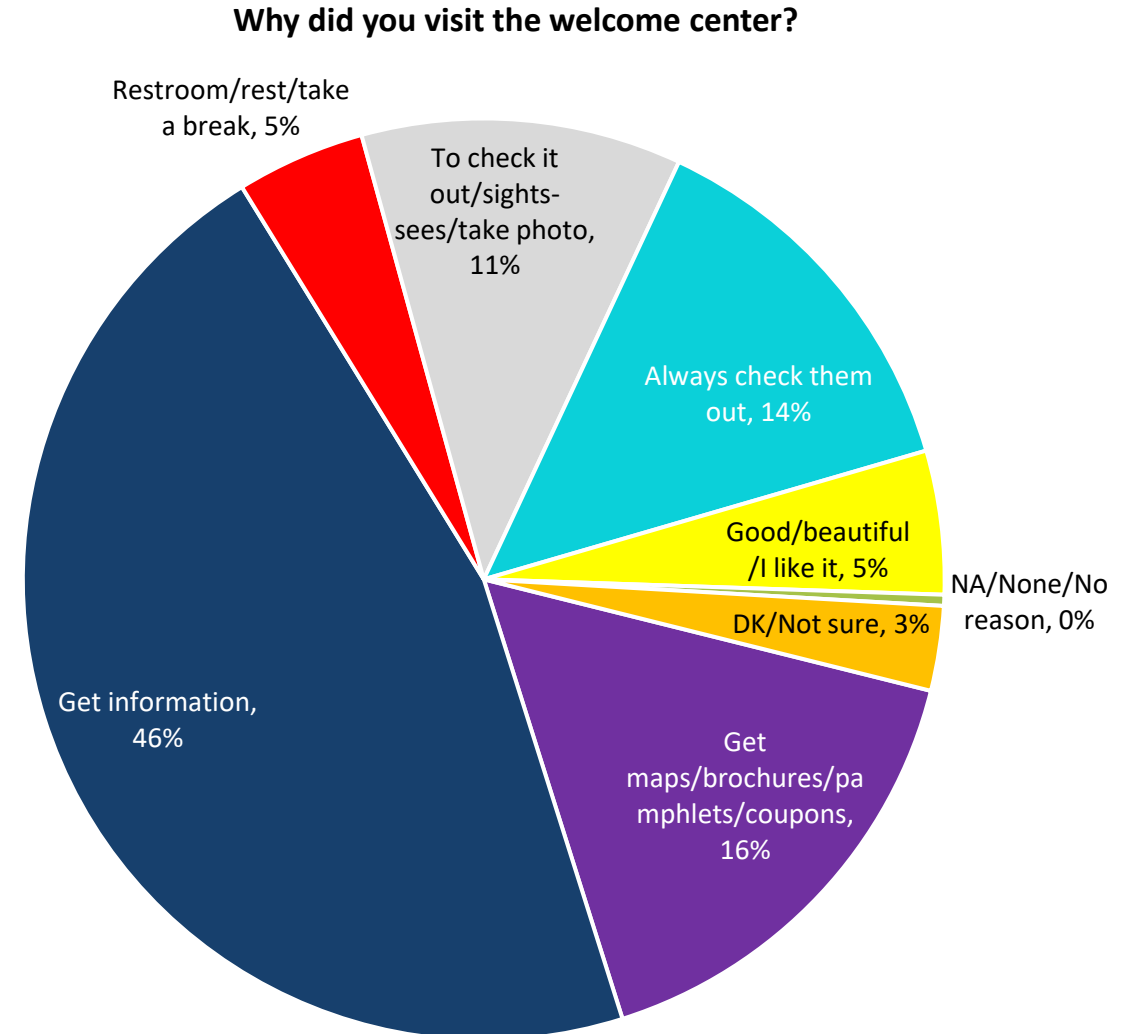
## Why didn't you visit the welcome center?



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

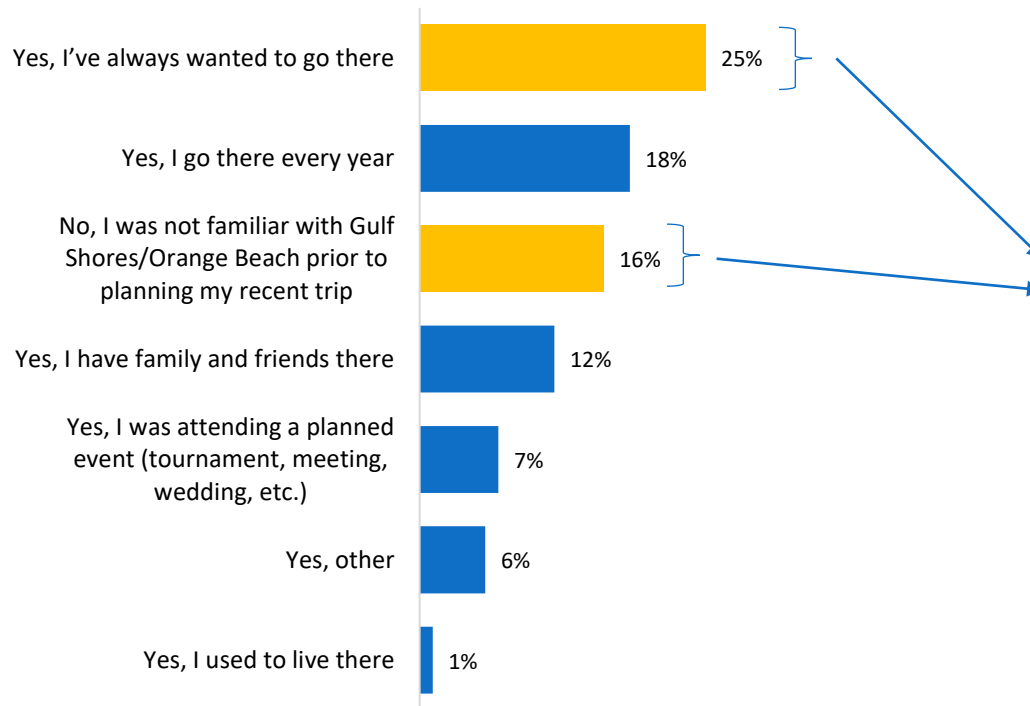
# Travel Planning – Welcome Center Visitors

- Almost half of visitors who stopped at a GSOBT visitor center did so to get information.
- The next most common reason is for specific sources of information – maps, coupons, etc.
- Others are frequent users of welcome centers as travel resources.

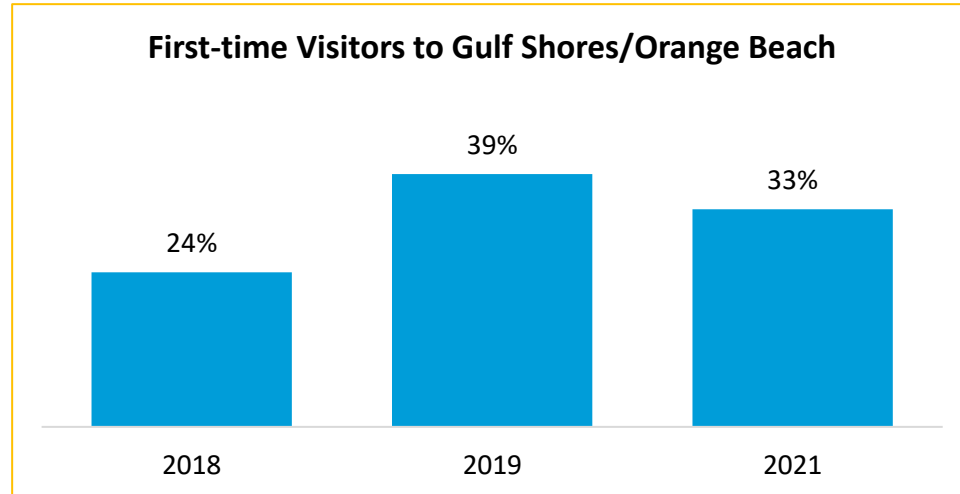


# Trip Characteristics

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



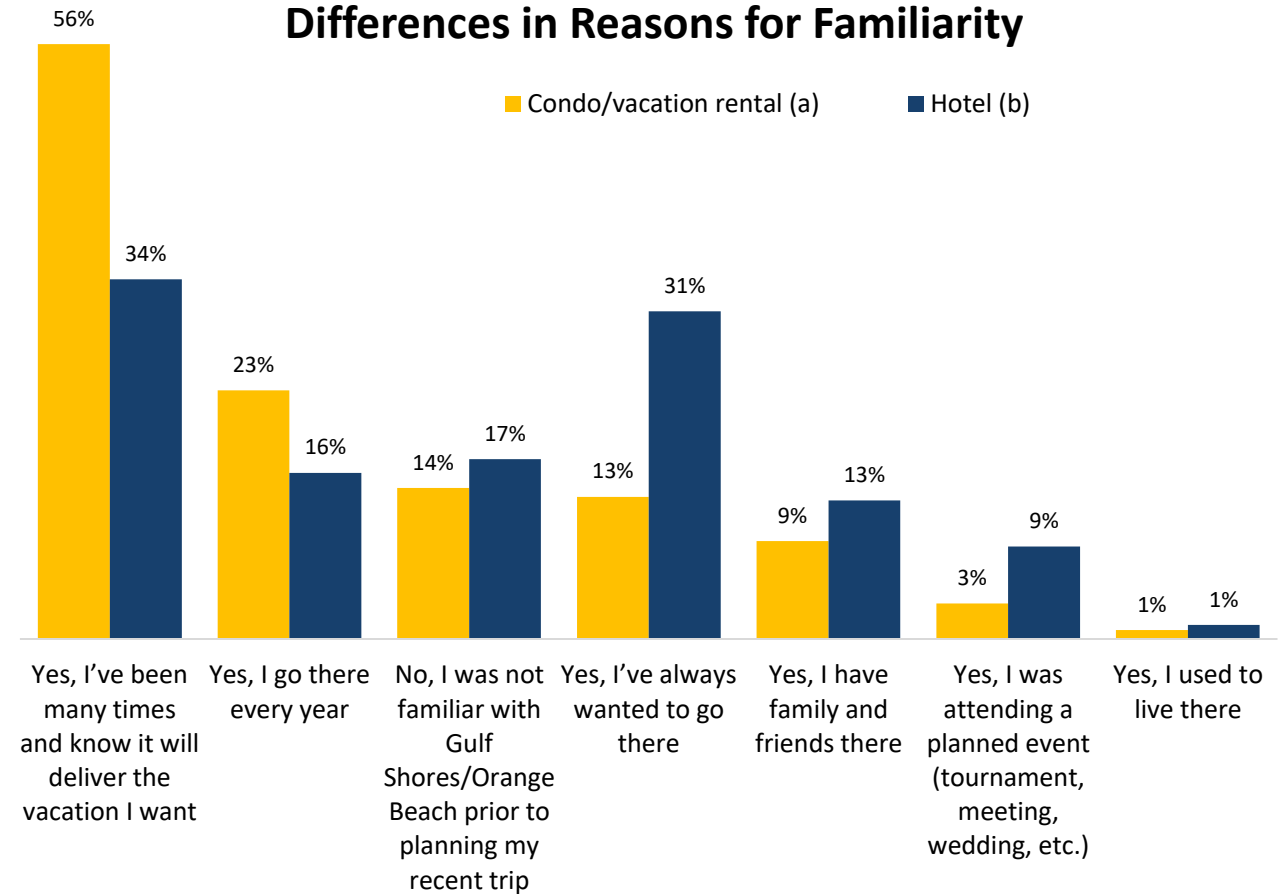
- The bulk of GS/OB trips continue to be repeat visits from those who are familiar with the destination.
- Although new visitors dropped in share from 2019, the destination continued to attract more new visitors than in prior years, reflecting the effectiveness of advertising to build awareness and visitation among new audiences.



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

Despite many changes in the travel landscape during the pandemic, condo stayers still tend to be repeat visitors and hotel stayers are still more likely to say they've always wanted to visit.

### Differences in Reasons for Familiarity



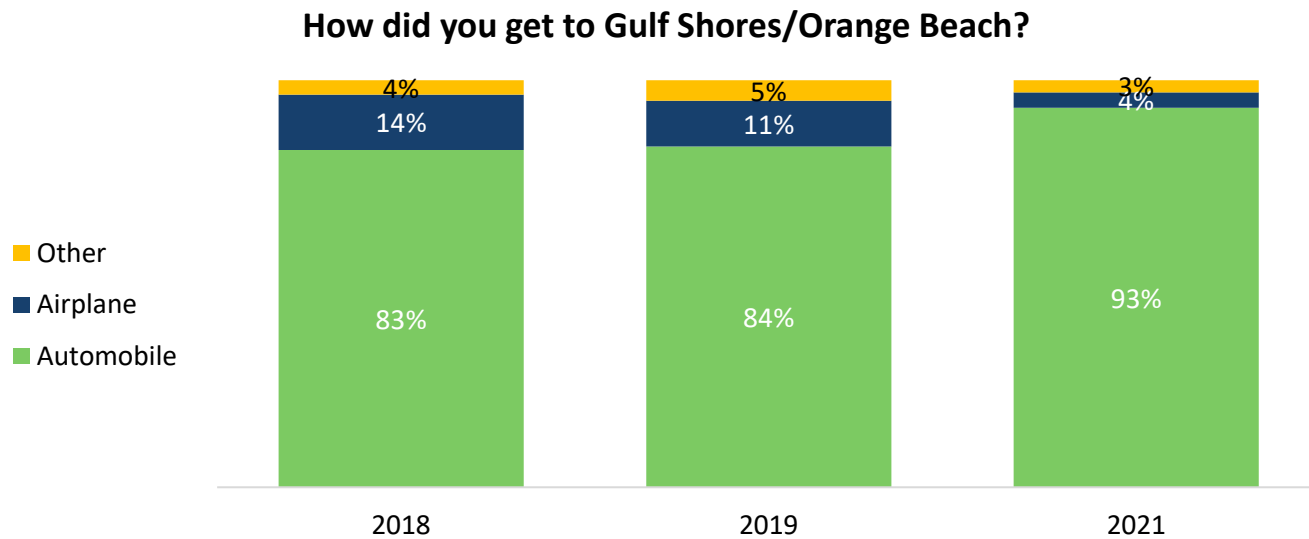
Vacation rental/condo n=156 (a); Hotel/motel n=266 (b); a / b indicate statistically significant differences at the 95% level.

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

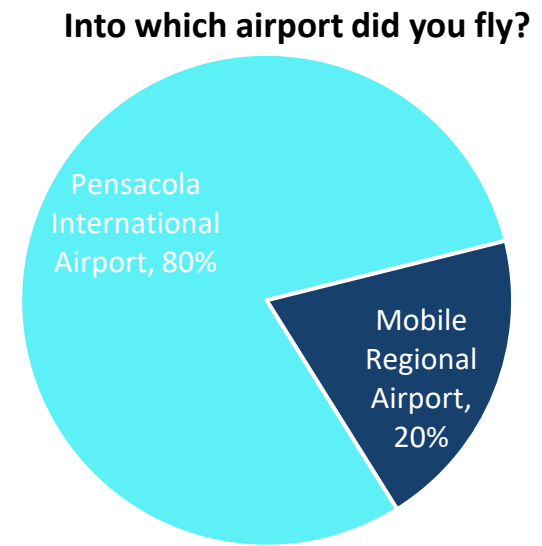


# Trip Characteristics

- It is not surprising that arrivals by air dropped, and road trips were even more dominate in 2021.



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



Question text: Into which airport did you fly? Response options as shown in graph above.

# Trip Characteristics

- As we would expect, most trips include the basic beach vacation activities of dining out, going to the beach, shopping, relaxing, and swimming.
- Dining out remained fairly consistent during the pandemic, but shopping dropped significantly.
- More niche appeal activities tend to have lower participation based on travel party make-up and trip purpose.

Spring trip participation	2018	2019	2021
Beaches	62%	75%	73%
Dining out	51%	68%	65%
Relaxing	59%	60%	61%
Swimming	37%	47%	48%
Shopping	37%	53%	45%
Sightseeing	23%	39%	36%
Tanger Outlets	17%	35%	23%
The Wharf	10%	21%	19%
Shelling	20%	17%	17%
Watching wildlife	18%	11%	17%
Fishing	11%	17%	14%
Gulf State Park	10%	19%	14%
Hiking on trails	7%	15%	13%
Boating or sailing	8%	10%	13%
Photography	15%	13%	12%
Fort Morgan Historic Site	4%	12%	12%
Exercise/Working out	10%	12%	12%
Bicycle riding	9%	8%	10%
Historical sites	11%	12%	10%
Visiting a spa	4%	6%	10%
Concerts and nightlife	19%	11%	10%
Battleship USS Alabama	6%	11%	10%
Family/friends reunion	12%	7%	10%
Visiting friends/relatives who live in the area	7%	9%	9%
Dauphin Island	9%	12%	9%

Cont'd.	2018	2019	2021
Alabama's Coastal Connection Scenic Byway	10%	9%	8%
Kayaking/Canoeing/Paddle boarding	4%	7%	8%
Birdwatching	9%	4%	8%
Dolphin tour	6%	11%	7%
Alabama Gulf Coast Zoo	7%	13%	7%
Golfing	4%	5%	6%
Waterville	1%	4%	6%
OWA Park	3%	3%	6%
Festivals or special events (non-sports events)	7%	6%	6%
Adventure Island	3%	7%	6%
The Track	3%	3%	5%
Parasailing/Jet skiing	4%	6%	5%
Tennis	5%	2%	4%
National Naval Aviation Museum	1%	6%	4%
Sporting events	1%	4%	4%
Scuba diving/Snorkeling	3%	6%	4%
Bellingrath Gardens	2%	3%	3%
Hugh S. Branyon Backcountry Trail	3%	0%	3%
Bon Secour National Wildlife Refuge	2%	5%	3%

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

# Impact of Closures

- Closures had only a minor impact on visitor activities in GS/OB this spring. More than half said there were no activities in the area that they wanted to participate in but were unable to due to closure or limited capacity. This is up from winter, when just 30% said they had no such issue.
- Dolphin tours and the National Naval Aviation Museum are the most common activities impacted by closure or capacity issues, which is consistent with what we saw in the winter measure.

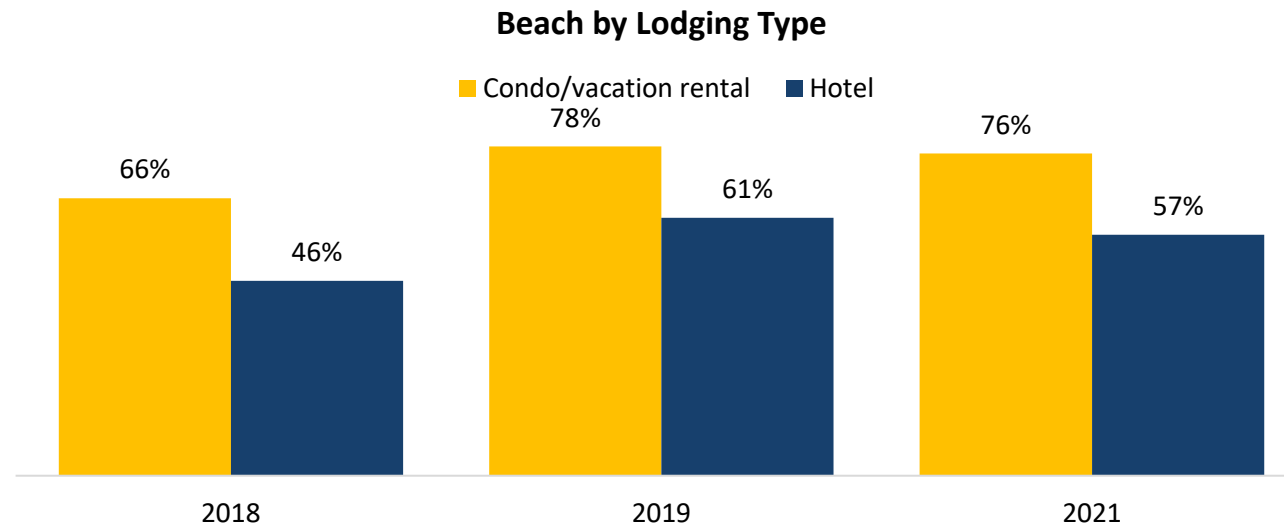
Impact of closure or limited capacity	Participated	Wanted to but couldn't
None of these	4%	58%
Dolphin tour	7%	9%
National Naval Aviation Museum	4%	7%
Alabama Gulf Coast Zoo	7%	5%
Concerts and nightlife	10%	5%
Battleship USS Alabama	10%	4%
Swimming	48%	4%
Fishing	14%	4%
Dauphin Island	9%	4%
Adventure Island	6%	4%
Dining out	65%	4%
Waterville	6%	4%
OWA Park	6%	4%
Scuba diving/Snorkeling	4%	4%
Fort Morgan Historic Site	12%	3%
Family/friends reunion	10%	3%
Visiting a spa	10%	3%
The Wharf	19%	3%
Gulf State Park	14%	3%
Exercise/Working out	14%	3%
Tanger Outlets	23%	3%
Parasailing/Jet skiing	5%	3%
Beaches	73%	3%
Relaxing	61%	3%
Sightseeing	36%	3%

Impact of closure or limited capacity	Participated	Wanted to but couldn't
Photography	12%	3%
Bon Secour National Wildlife Refuge	3%	3%
Historical sites	10%	3%
Shelling	17%	2%
The Track	5%	2%
Hugh S. Branyon Backcountry Trail	3%	2%
Bellingrath Gardens	3%	2%
Festivals or special events (non-sports events)	6%	2%
Kayaking/Canoeing/Paddle boarding	8%	2%
Visiting friends/relatives who live in the area	9%	2%
Alabama's Coastal Connection Scenic Byway	8%	2%
Civil War History Trail	5%	2%
Hiking on trails	13%	2%
Golfing	6%	2%
Tennis	4%	2%
Shopping	45%	1%
Birdwatching	8%	1%
Coastal Birding Trail	5%	1%
Sporting events	4%	1%
Boating or sailing	13%	1%
Bicycle riding	10%	1%
Watching wildlife	17%	1%

# Trip Characteristics

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- A majority of both vacation rental and hotel guests visited the beach, but beach use is higher among those who stayed in a vacation rental.
- Among hotel guests, beach use dropped slightly from 2019 but remains above 2018.



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 2018 n=298; 2019 n=150; 2021 n=156

Hotel/motel 2018 n=80; 2019 n=278; 2021 n=266

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

# Trip Characteristics

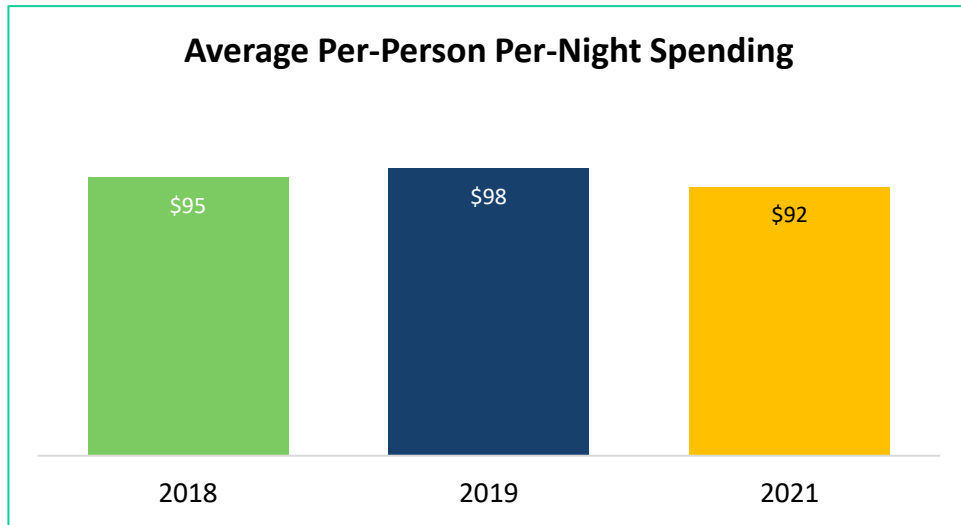
- The beach remains the main motivator of spring visits to GS/OB, followed by relaxing.
- Although the participation in dining out remained consistent, it was less of a motivator for spring trips in 2021 than pre-pandemic.

Top Spring trip motivators	2018	2019	2021
Beaches	54%	66%	62%
Relaxing	39%	38%	42%
Dining out	16%	32%	23%
Swimming	16%	19%	17%
Sightseeing	9%	11%	12%
Shopping	8%	16%	9%
Fishing	6%	8%	8%
Visiting friends/relatives who live in the area	5%	4%	6%
Tanger Outlets	5%	10%	5%
Family/friends reunion	9%	4%	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.

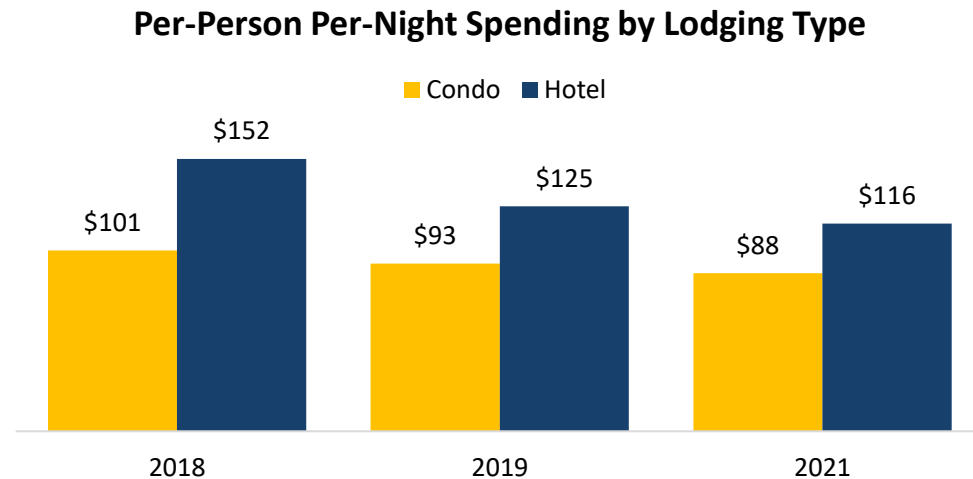
# Trip Characteristics

- Average per-person per-day spring trip spending dipped across both lodging types, to an average of \$92.



2018 n=377; 2019 n=428; 2021 n=422

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



Condo/vacation rental 2018 n=298; 2019 n=150; 2021 n=156

Hotel/motel 2018 n=80; 2019 n=278; 2021 n=266

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.

# Trip Characteristics

- Overall spending increased in every category driven by longer stays in both condos and hotels.
- Condo-stay spending is higher than hotel due to longer stays and larger travel parties.

Average Travel Party Expenditures per Trip - SPRING	2018		2019		2021	
	Spending	% of total	Spending	% of total	Spending	% of total
Lodging	\$809	52%	\$842	52%	\$1,007	52%
Meals/food/groceries	\$284	18%	\$340	21%	\$382	20%
Shopping	\$186	12%	\$214	13%	\$226	12%
Recreation or entertainment	\$164	10%	\$144	9%	\$180	9%
Transportation within Gulf Shores	\$90	6%	\$45	3%	\$67	3%
Other	\$26	2%	\$41	2%	\$65	3%
<b>Total</b>	<b>\$1,558</b>		<b>\$1,626</b>		<b>\$1,926</b>	

2018 n=377; 2019 n=428; 2021 n=422

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

Average Travel Party Expenditures per Trip - SPRING	2018		2019		2021	
	Condo	Hotel	Condo	Hotel	Condo	Hotel
Lodging	\$881	\$504	\$948	\$420	\$1,133 <sup>b</sup>	\$485
Meals/food/groceries	\$289	\$265	\$368	\$230	\$407 <sup>b</sup>	\$277
Shopping	\$166	\$272	\$216	\$208	\$213	\$278 <sup>a</sup>
Recreation or entertainment	\$152	\$213	\$141	\$154	\$180	\$180
Transportation within Gulf Shores	\$83	\$118	\$42	\$58	\$61	\$90 <sup>a</sup>
Other	\$21	\$47	\$33	\$69	\$68	\$51
<b>Total</b>	<b>\$1,591</b>	<b>\$1,419</b>	<b>\$1,748</b>	<b>\$1,140</b>	<b>\$2,061</b>	<b>\$1,362</b>

Condo/vacation rental 2018 n=298; 2019 n=150; 2021 n=156

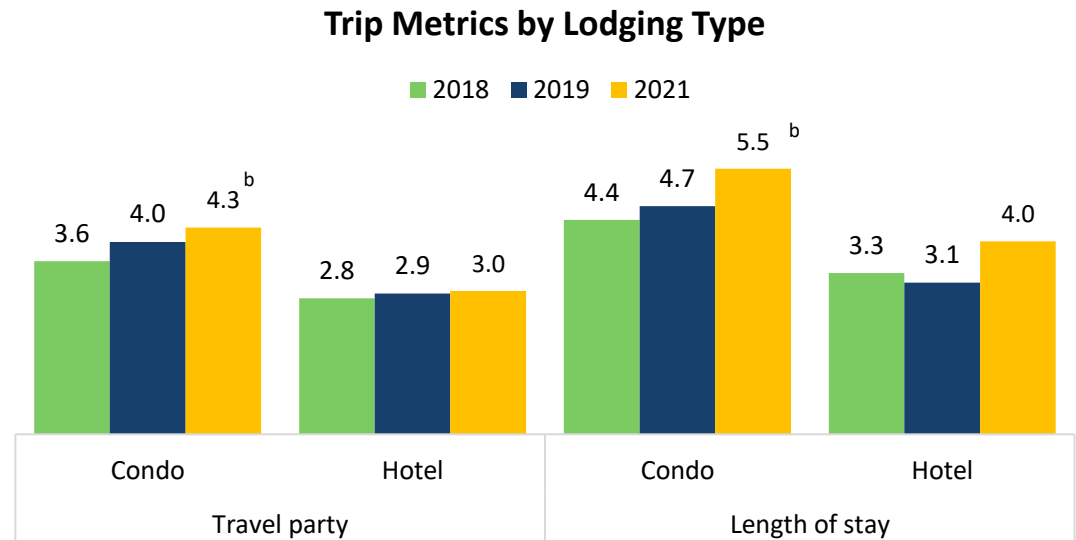
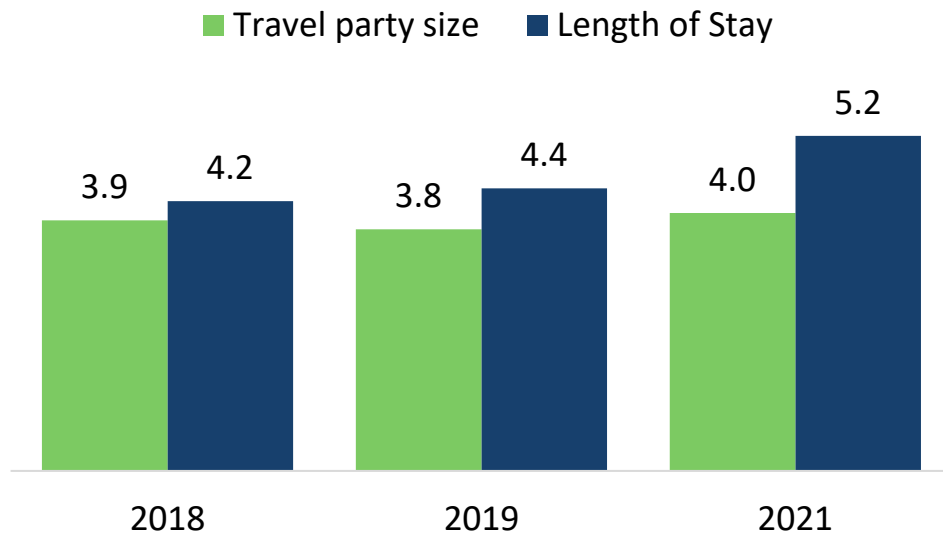
Hotel/motel 2018 n=80; 2019 n=278; 2021 n=266

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

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

# Travel Party Characteristics

- Travel party size increased from 3.8 to 4.0, driven by travelers who stayed in condos.
- Visits are longer this spring compared to last for visitors in both lodging categories.



Condo/vacation rental 2018 n=298; 2019 n=150; 2021 n=156

Hotel/motel 2018 n=80; 2019 n=278; 2021 n=266

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

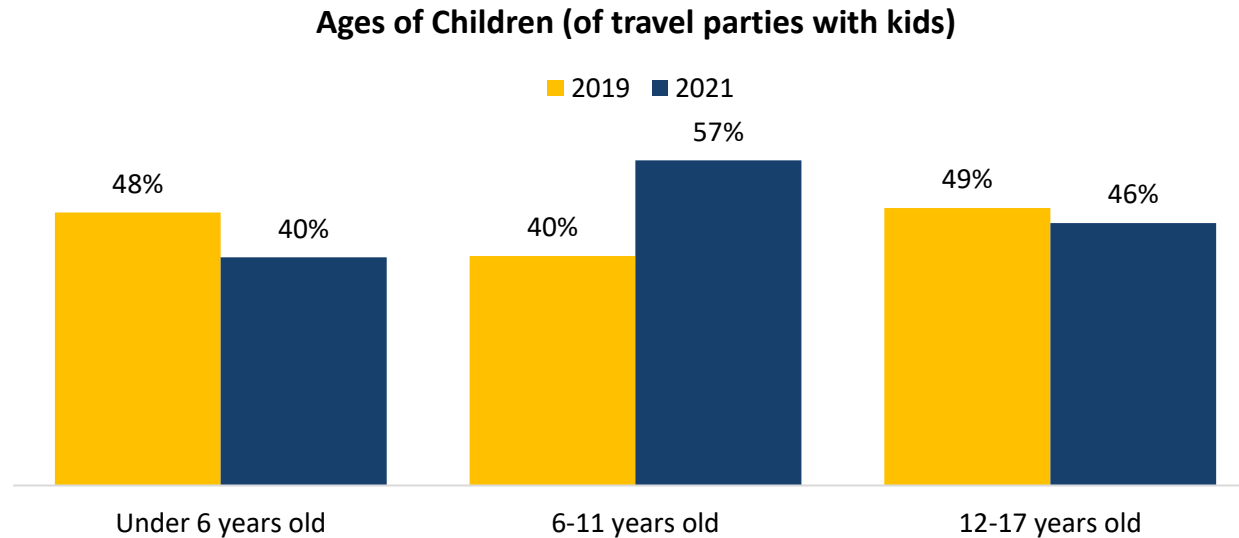
Question text: Including yourself, how many people were in your travel party? How many nights did you stay in Gulf Shores/Orange Beach during this trip? If you did not stay overnight, please enter '0'. Open-ended numeric responses.



# Travel Party Characteristics

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- A large jump in the presence of elementary school age children, along with longer stays, is indicative of work-anywhere opportunities and virtual classrooms.
- Fewer travel parties included children under 6 years of age.



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

# Travel Party Characteristics

- As in prior measures, the majority of travel decision-makers are married. This spring saw a decrease in single/never married.
- Average household income is higher this spring than last.
- 2021 spring visitors were younger than 2019 visitors as more people with school age children were able to travel.
- Next we will look at demographics by lodging type.

Year-over-Year Demographic Profile		2018	2019	2021
<b>Age</b>	Average	46	49	47
<b>Marital status</b>	Married	73%	70%	67%
	Divorced/ Separated	12%	7%	11%
	Single/ Never married	13%	19%	3%
	Widowed	2%	4%	18%
<b>HH income</b>	Average	\$98,576	\$115,594	\$128,531

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

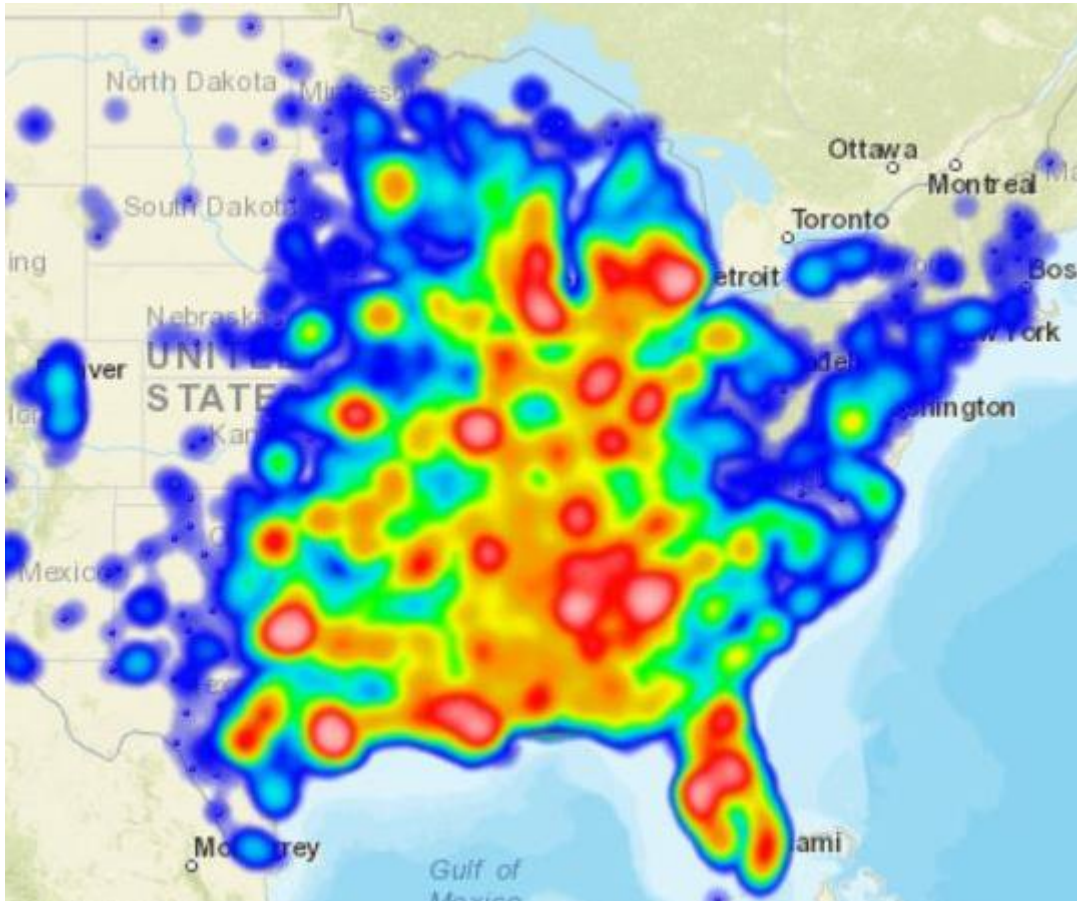
- As we have seen before, hotel visitors are a more ethnically diverse group than condo stayers.
- Condo renters are older and have higher incomes.
- Education is fairly similar across lodging types, and 2019 gains in the share of college grads was retained.

Spring demographic profile by lodging type		2018		2019		2021	
		Vacation rental/condo	Hotel	Vacation rental/condo	Hotel	Vacation rental/condo	Hotel
<b>Age</b>	Average	47	40	49	47	48	47
<b>Marital status</b>	Married	76%	64%	75%	67%	74%	64%
	Divorced/Separated	12%	11%	10%	4%	11%	12%
	Single/Never married	10%	22%	11%	26%	3%	3%
	Widowed	2%	3%	4%	3%	12%	22%
<b>HH income</b>	Average	\$101,184	\$91,354	\$118,387	\$104,274	\$141,421	\$121,835
<b>Education</b>	College grad+	59%	55%	64%	61%	63%	61%
<b>Occupation</b>	Executive/upper mgmt.	12%	18%	15%	15%	14%	19%
	IT professional	5%	12%	5%	10%	6%	10%
	Educator	5%	5%	13%	11%	7%	5%
	Homemaker	12%	8%	14%	10%	10%	7%
	Student	3%	3%	1%	1%	1%	0%
	Small business owner	9%	9%	4%	4%	5%	6%
	Skilled trade/service	10%	11%	7%	10%	15%	9%
	Other	14%	15%	17%	14%	21%	26%
	Retired	27%	11%	24%	17%	20%	11%
Not currently employed	3%	9%	1%	6%	2%	7% <sup>a</sup>	
<b>Ethnicity</b>	Caucasian/White	85%	80%	92%	77%	92%	87%
	African-American/Black	6%	11%	5%	15%	6%	6%
	Latino/Hispanic	5%	5%	2%	4%	2%	5%
	Asian	2%	6%	2%	6%	2%	4%
	American Indian	0%	3%	0%	0%	0%	1%
	Other	3%	1%	1%	0%	0%	0%

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) Which of the following categories represents the last grade of school you completed? (High school or less, Some college/technical school, College graduate, Post-graduate degree) What is your occupation? (Response options shown in table) What of the following best describes your ethnic heritage? Are you...? Select all that apply. (Response options shown in table)

# Travel Party Characteristics

- Heat map showing source markets of spring 2021 visitors

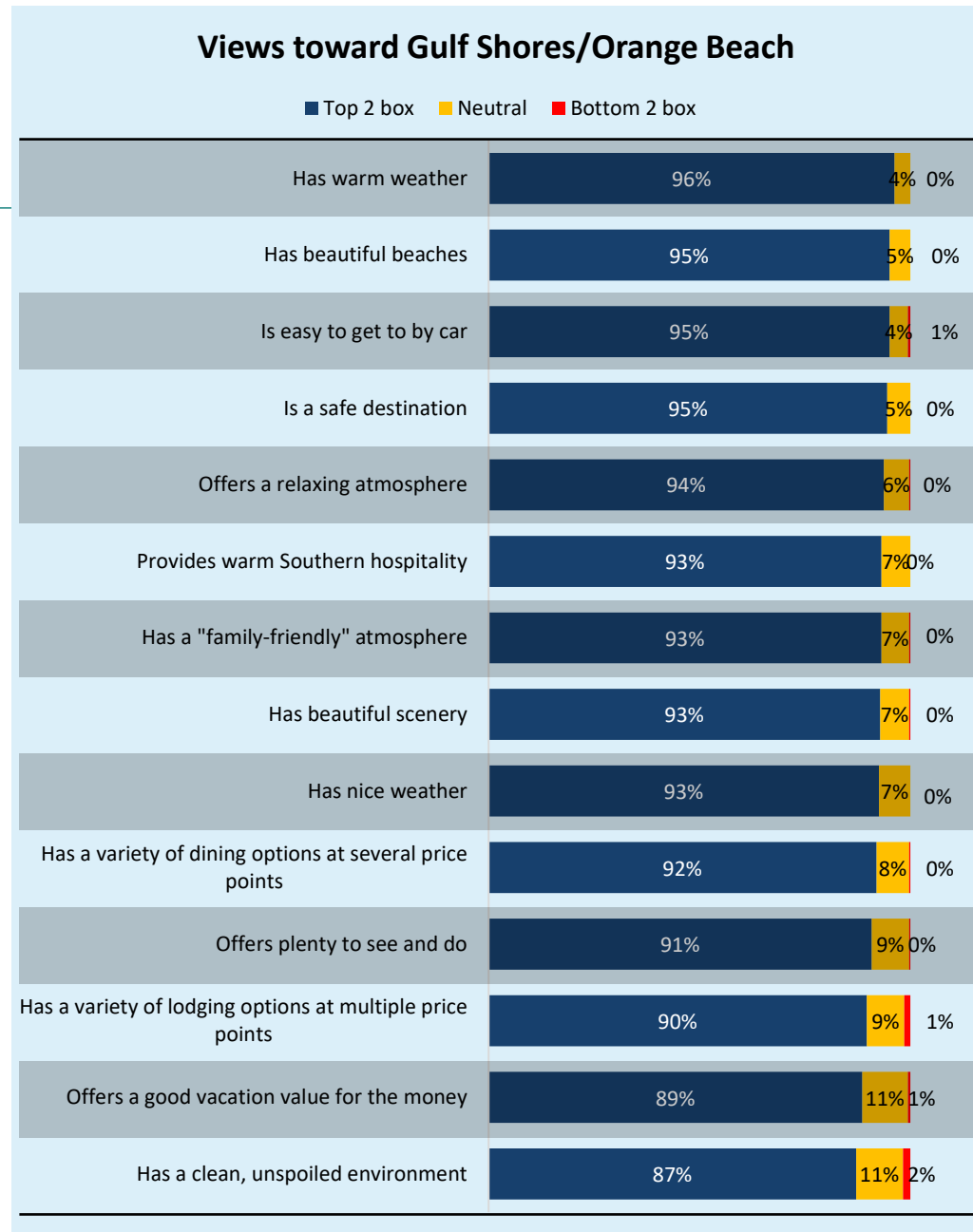


Top States of Origin	2018	2019	2021
Alabama	17%	25%	28%
Louisiana	9%	12%	14%
Mississippi	5%	9%	12%
Florida	14%	13%	9%
Georgia	7%	5%	8%
Tennessee	4%	5%	6%
Texas	12%	6%	5%
Arkansas	6%	3%	3%
Missouri	2%	2%	3%
Illinois	3%	2%	2%
Michigan	3%	2%	2%
Indiana	3%	2%	2%
Kentucky	1%	2%	2%
Wisconsin	6%	1%	1%
Ohio	5%	1%	1%
Iowa	0%	0%	1%

# Views Toward GS/OB & Trip Satisfaction

- Beaches remain one of the top-rated image attributes for GS/OB.
- Weather compares favorably to spring 2019, as does accessibility – only 90% of visitors agreed that GS/OB was easy to get to, versus 95% this spring.
- The destination’s safety continues to get highly positive ratings.

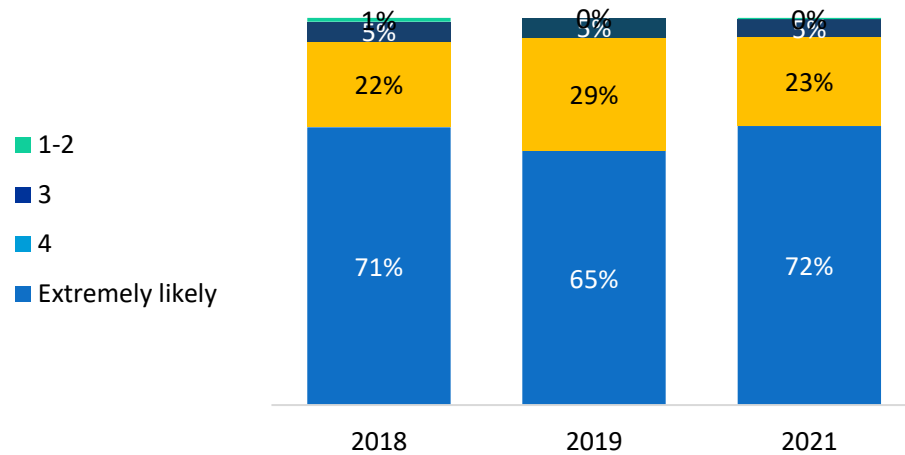
Question text: Thinking now about Gulf Shores/Orange Beach, how much do you agree that each of these statements describes the area? Response options: Does not describe at all – 1, 2, 3, 4, Describes extremely well – 5



# Views Toward GS/OB & Trip Satisfaction

- Likelihood to recommend GS/OB remains very high.
- The response “extremely likely to recommend” has rebounded and exceeds 2018 levels, particularly among condo stayers.

Likelihood to Recommend GS/OB



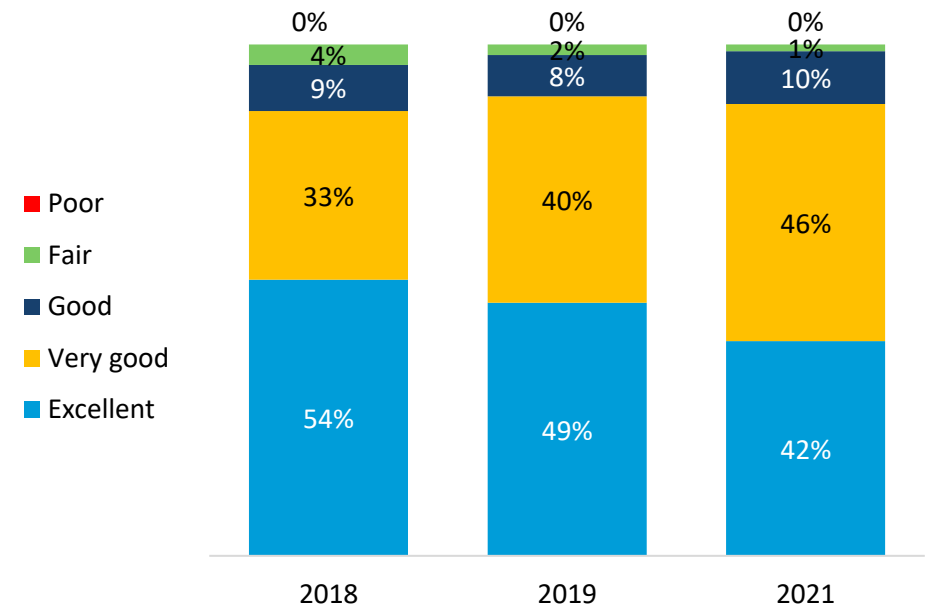
How likely are you to recommend Gulf Shores/Orange Beach to your friends or family as a destination to visit for a leisure trip?		2018	2019	2021
Vacation rental/condo	<b>Top 2 Box</b>	<b>94%</b>	<b>94%</b>	<b>96%</b>
	5 – extremely likely	73%	68%	77%
	4	21%	26%	19%
Hotel	<b>Top 2 Box</b>	<b>90%</b>	<b>96%</b>	<b>95%</b>
	5 – extremely likely	64%	66%	70%
	4	26%	31%	25%

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

# Views Toward GS/OB & Trip Satisfaction

- GSOBT tracks service ratings to gauge whether seasonal staffing challenges are reflected in the satisfaction metric. Post-pandemic, the destination has faced challenges finding staff for many restaurants and bars and other customer service roles.
- While many consumers understand the reasons for this, comments underscore the need for communication to help manage expectations.
- Of those who rated their service good, comments include:
  - “It was good; not as good as previous stays. We were just happy to get a break after so long.”
  - “Normally we have great service but many businesses were just getting back to business due to Covid and hurricane damage, and most places were badly understaffed.”
- Of those who rated it fair, comments include:
  - “You had to get to restaurants BY 5pm in order to get seated. The wait times were ridiculous.”
  - “A lot of restaurants were very short staffed. A lot of places seemed to be short staffed. Waits were long, places were closed at odd times that did not match their websites or facebook pages.”

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



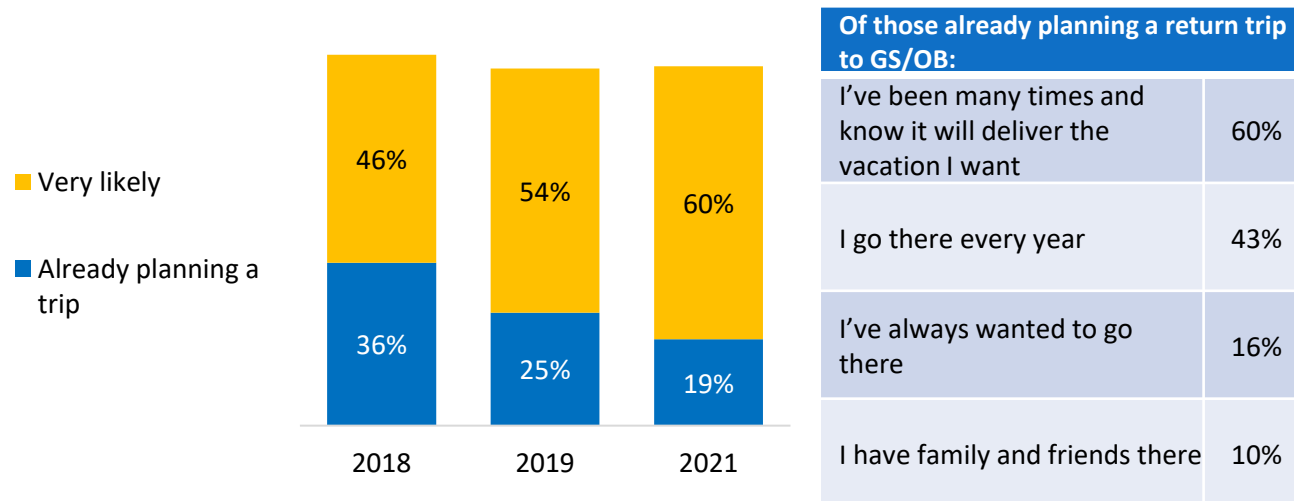
2018 n=377; 2019 n=428; 2021 n=422

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

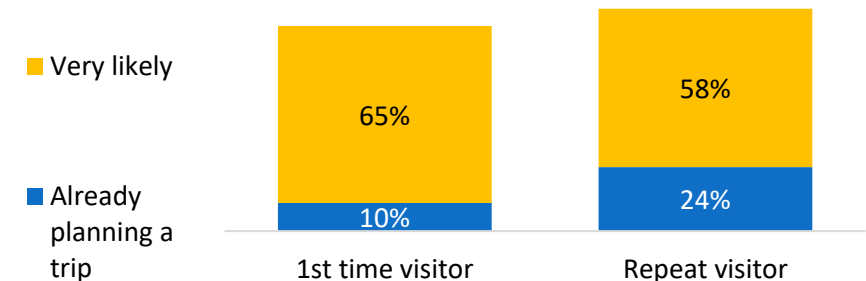
# Views Toward GS/OB & Trip Satisfaction

- Likelihood to return remains high, particularly among those who are already repeat visitors.
- However, the overall share of spring visitors who are already planning a return in the next year is now under 20%. This is likely the result of uncertainty about public health and pandemic safety issues – the same things that are causing consumers to wait longer to plan and book travel.

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



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



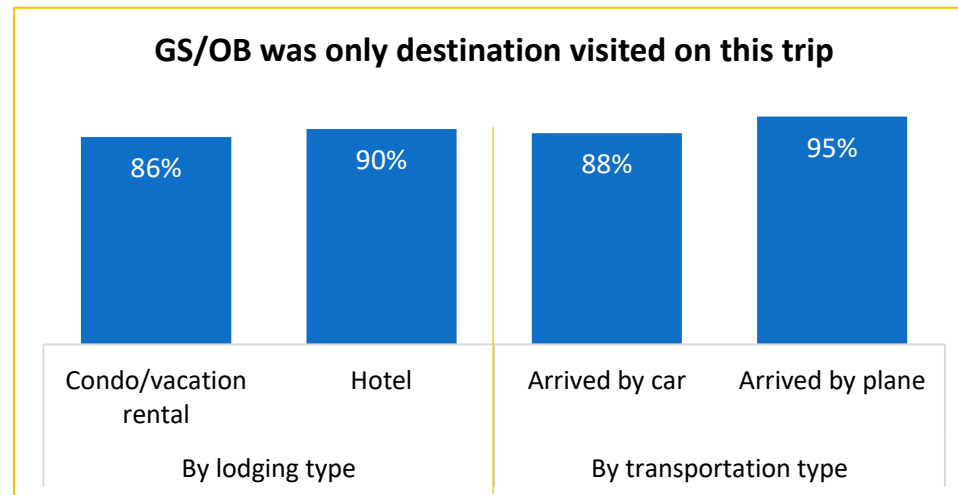
Question text: How likely are you to visit Gulf Shores/Orange Beach in the next year? Response options: Not at all likely, Not very likely, Somewhat likely, Very likely, Already planning a trip



# Destinations Visited

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- GS/OB overnight trips continue to be single-destination tips for the most part, regardless of lodging type or transportation.
- Other destinations visited by those who took side trips include Destin and Pensacola.



Question text: Was Gulf Shores/Orange Beach the only destination you visited on this trip? Yes/No [IF NO] Where else did you go on this trip? Open-ended response.



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# Welcome Center Supplemental Analysis

Visitor Profile Research – Spring 2021

# Welcome Center Impact

- When evaluating welcome center impact, context is important. For example, the Welcome Center has less opportunity to impact length of stay than it does to impact what people do and where they go during their trip. Length of leisure travel is often decided ahead of time and no matter how much visitors might like to, extending a stay is not always feasible.
- So when we see in the data that visitors who went to a GSOBT Welcome Center on their trip stayed about the same amount of time in the destination, this is not a surprise.
- However, Welcome Center visitors participated in more activities. This makes sense, given that activities and attractions are promoted at the centers. It is not surprising that the number of activities decreased during the pandemic.

Spring 2019 v. 2021 visits	No Welcome Center		Visited Welcome Center	
	2019	2021	2019	2021
Length of stay	3.5	4.2	3.6	4.8
# of activities on trip	5.3	4.9	9.1	8.7

# Impact on Spending

- Welcome Center visitors spent 25% more money in the destination, and more than twice as much on shopping.
- Spending on lodging was significantly lower among Welcome Center visitors, compared to 2019 and compared to those who did not visit the Welcome Center. This is related to Welcome Center visitors tending to be newer to the destination and hotel stayers.

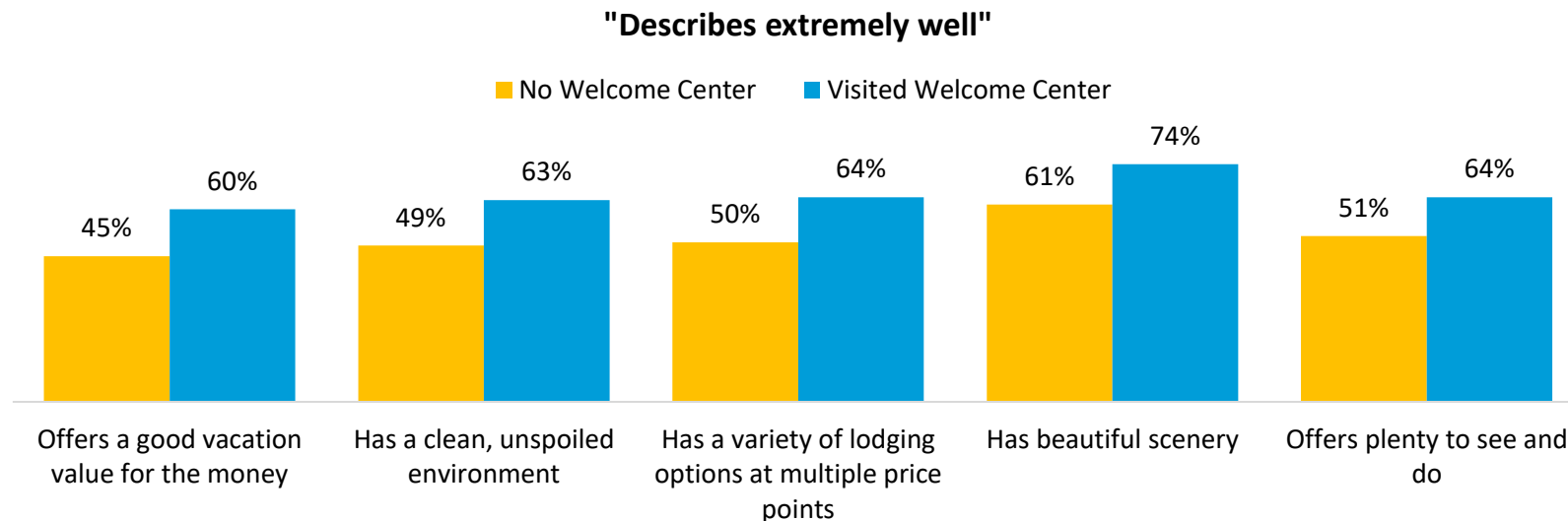
Trip spending	No Welcome Center		Visited Welcome Center	
	2019	2021	2019	2021
Lodging	\$690	\$782	\$672	\$549
Meals/food/groceries	\$282	\$266	\$334	\$291
Shopping	\$135	\$170	\$345	\$359
Recreation or entertainment	\$113	\$103	\$174	\$280
Transportation within Gulf Shores	\$35	\$40	\$100	\$144
Other	\$27	\$30	\$81	\$107
<b>Total</b>	<b>\$1,282</b>	<b>\$1,391</b>	<b>\$1,706</b>	<b>\$1,730</b>

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

# Impact on Image

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- Welcome Center visitors agree more strongly the GS/OB is a good value, has lots to see and do, and a variety of lodging options.
- The Welcome Center also positively impacts views of the destination's unspoiled environment and beautiful scenery.



# Demographic Differences

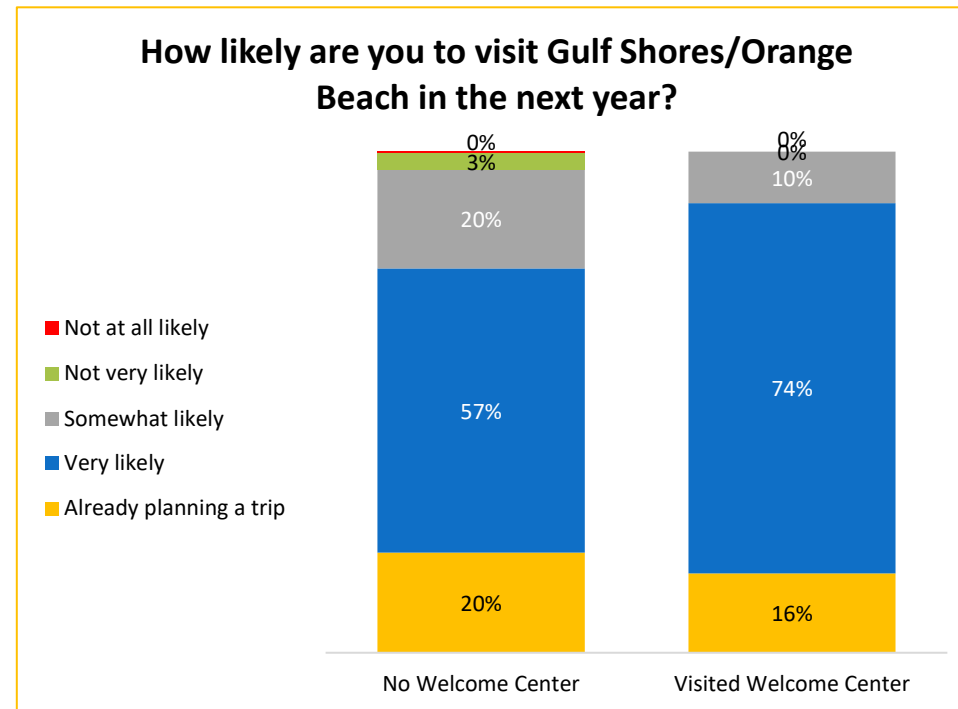
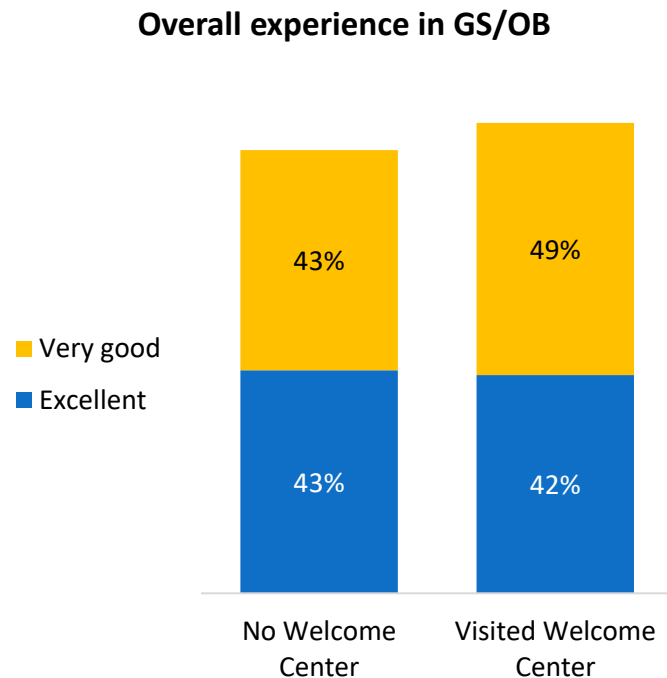
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- Welcome Center visitors skew younger than those who don't visit.
- Given that Welcome Center visitors tend to be new to the destination, this makes sense.
- Center visitors are also more likely to have kids in their travel party, which is consistent with looking for information on a breadth of activities and experiences.
- This is also consistent with Welcome Center visitors being newer to GS/OB.

Demographic differences		No Welcome Center	Visited Welcome Center
Age	25-35	18%	31%
	36-50	33%	36%
	51-65	39%	26%
	66+	9%	7%
Kids on trip		39%	55%

# Impact on Experience and Intent to Return

- Four in ten spring visitors reported an excellent experience in the destination, regardless of center visitation. Welcome Center visitation boosts “very good” experience ratings. Similarly, the share of visitors already planning a return trip is fairly level regardless of center visitation, but there is a significant lift in share of Welcome Center visitors saying they are very likely to return.





# Appendices

Visitor Profile Research – Spring 2021



# Comparing Target to Other Travelers

- Target travelers are those who stay overnight in paid lodging in GS/OB.
- But there are other consumers who visit the area, who spend money at local restaurants, shops, and attractions.
- This section of the report focuses on day visitors – those who visited but did not stay overnight in GS/OB. A third of these visitors were new to the area in spring 2021.
- Non-target day trips exclude local residents. Visitors who live in Pensacola and came to GS/OB for a day trip are included.
- We employed screening questions to ensure that day visitors are coming to Gulf Shores/Orange Beach for leisure, rather than for work.

Non-target SPRING Day trips	2018	2019	2021
Average # visits/year	1.7	1.8	2.2
First time trips	34%	37%	33%

2018 day trip n=153; 2019 day trip=160; 2021 day trips n=113

# Comparing Target to Other Travelers

Began planning trip	2018		2019		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
< 1 week before trip	4%	31%	5%	49%	5%	65%a
1-2 weeks	12%	12%	6%	20%	11%	16%
3 weeks - 1 month	24%	18%	21%	11%	25%b	13%
2 - 3 months	28%	16%	32%	5%	39%b	3%
4-6 months	18%	10%	25%	5%	12%b	2%
6+ months	15%	12%	11%	9%	8%b	1%

GS/OB is only destination visited on this trip	2018		2019		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
	84%	80%	90%	75%	88%	87%

2018 day trip n=153; 2019 day trip=160; 2021 day trips n=113  
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.  
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	2018		2019		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Family or friends	32%	48%	28%	31%	31%	33%
Social media	16%	16%	15%	8%	16%	16%
Gulf Shores & Orange Beach Tourism website	14%	17%	24%	8%	29%b	15%
Travel/visitor guide	8%	14%	17%	5%	18%	11%
Traveler review sites or apps	12%	11%	26%	6%	22%b	9%
Alabama's official tourism website	12%	9%	13%	4%	10%	7%
Hotel websites	17%	20%	24%	11%	20%b	7%
Travel blogs	5%	10%	7%	11%	6%	6%
Magazine and newspaper articles	5%	3%	3%	7%	6%	6%
Booking websites or apps	19%	16%	21%	11%	19%b	5%
Vacation home rental booking sites/apps	33%	14%	36%	5%	35%b	5%
Travel advice websites or apps	11%	12%	10%	10%	16%b	4%
Local vacation rental company sites	12%	11%	16%	4%	18%b	4%

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

2018 day trip n=153; 2019 day trip=160; 2021 day trips n=113  
a / b indicate statistically significant differences at the 95% level.

# Comparing Target to Other Travelers

Children on trip	2018		2019		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
% of trips with children	33%	37%	42%	34%	48%	30%
Of trips with children:	<i>2018 target n=56, day trip n=10; 2019 target n=177, day trip n=33; 2021 target n=182, day trip=27</i>					
< 6 years old	38%	29%	48%	33%	40%	30%
6-11 years old	40%	53%	40%	64%	57%	37%
12-17 years old	59%	29%	49%	36%	46%	56%

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	2018		2019		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Automobile	83%	71%	84%	85%	93%	96%
Airplane	14%	19%	11%	14%	4%	4%
Other	4%	10% <sup>af</sup>	5%	1%	3%	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.

2018 day trip n=153; 2019 day trip=160; 2021 day trips n=113  
 a / b indicate statistically significant differences at the 95% level.

# Comparing Target to Other Travelers

	2018		2019		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Travel Party Size	3.4	2.9	3.8	2.7	4.0	2.6

Trip spending	2018		2019		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Lodging	\$809	\$0	\$842	\$0	\$1,007	\$0
Meals/food/groceries	\$284	\$127	\$340	\$134	\$382 <sub>b</sub>	\$90
Shopping	\$186	\$136	\$214	\$105	\$226 <sub>b</sub>	\$89
Recreation or entertainment	\$164	\$86	\$144	\$76	\$180 <sub>b</sub>	\$37
Transportation within Gulf Shores	\$90	\$60	\$45	\$78	\$67 <sub>b</sub>	\$23
Other	\$26	\$24	\$41	\$44	\$65 <sub>b</sub>	\$24
TOTAL	\$1,558	\$434	\$1,626	\$436	\$1,926	\$263
<b>Per person spending</b>	<b>\$459</b>	<b>\$151</b>	<b>\$432</b>	<b>\$160</b>	<b>\$479</b>	<b>\$103</b>

2018 day trip n=153; 2019 day trip=160; 2021 day trips n=113  
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?

# Comparing Target to Other Travelers

Demographics		2018		2019		2021	
		Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Gender	Male	27%	27%	34%	34%	32%	33%
	Female	73%	73%	65%	65%	68%	67%
Age	Average	46	41	49	54	47	49
Marital status	Married	73% <sup>d</sup>	54%	70%	75%	67%	59%
	Single	25%	25%	26%	18%	14%	15%
	Other	2%	20%	4%	7%	18%	26%
HH income	Average	\$98,576	\$74,118	\$115,594	\$96,292	\$128,531	\$101,459

2018 day trip n=153; 2019 day trip=160; 2021 day trips n=113  
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	2018		2019		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Offers a relaxing atmosphere	92%	79%	95%	89%	94%	93%
Is easy to get to by car	88%	77%	90%	87%	95%	90%
Has beautiful beaches	92%	79%	95%	94%	95%	97%
Has a "family-friendly" atmosphere	96%	77%	93%	90%	93%	85%
Is a safe destination	92%	78%	93%	92%	95%	87%
Has a clean, unspoiled environment	83%	73%	85%	93%	87%	87%
Offers plenty to see and do	89%	74%	91%	83%	91%	80%
Has nice weather	93%	81%	93%	90%	93%	97%
Provides warm Southern hospitality	90%	78%	92%	88%	93%	85%
Has a variety of dining options at several price points	89%	75%	91%	88%	92%	80%
Has a variety of lodging options at multiple price points	89%	67%	90%	81%	90%	72%
Has beautiful scenery	93%	77%	94%	95%	93%	90%
Has warm weather	94%	78%	93%	93%	96%	97%
Offers a good vacation value for the money	90%	73%	89%	81%	89%	80%

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

2018 day trip n=153; 2019 day trip=160; 2021 day trips n=113  
a / b indicate statistically significant differences at the 95% level.

# Comparing Target to Other Travelers

Overall Experience	2018		2019		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
<b>Top 2 Box Rating</b>	<b>87%</b>	<b>63%</b>	<b>91%</b>	<b>83%</b>	<b>88%</b>	<b>80%</b>
5 (Excellent)	46%	39%	51%	46%	48%	43%
4 (Very good)	41%	24%	40%	37%	39%	36%
3 (Good)	12%	27%	7%	15%	12%	20% <sup>a</sup>
2 (Fair)	1%	8%	1%	1%	0%	0%
1 (Poor)	0%	2%	0%	1%	0%	0%

Likelihood to Recommend	2018		2019		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
<b>Top 2 Box Rating</b>	<b>93%</b>	<b>73%</b>	<b>95%</b>	<b>87%</b>	95%	90%
5 (Extremely likely)	71%	51%	65%	58%	72%	66%
4	22%	22%	29%	29%	23%	25%
3	5%	18%	5%	12%	5%	7%
2	1%	5%	0%	0%	0% <sup>a</sup>	2%
1 (Not at all likely)	0%	4%	0%	1%	0%	2%

2018 day trip n=153; 2019 day trip=160; 2021 day trips n=113

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	2018		2019		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
<b>Likely to Return (top 2 box)</b>	<b>83%</b>	<b>82%</b>	<b>79%</b>	<b>73%</b>	<b>79%</b>	<b>84%</b>
5 (Already planning a trip)	28%	36%	25%	28%	19%	18%
4 (Very likely)	54%	46%	54%	46%	60%	66%
3 (Somewhat likely)	11%	13% <sup>c</sup>	16%	16%	18%	11%
2 (Not very likely)	3%	5%	4%	7%	2%	3%
1 (Not at all likely)	3%	0% <sup>c</sup>	1%	4%	0% <sup>a</sup>	2%

During which season(s) would you be most likely to visit (of those likely to visit)	2018		2019		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Spring	48%	35%	59%	54%	50%	48%
Summer	53%	60%	52%	47%	62%	66%
Fall	31%	36%	29%	37%	38%	38%
Winter	15%	11%	9%	14%	10%	17%

2018 day trip n=153; 2019 day trip=160; 2021 day trips n=113  
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	2018		2019		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Florida	14%	31% <sup>ac</sup>	10%	19%	20%	25%
Alabama	17%	10%	20%	28%	19%	41% <sup>a</sup>
Georgia	7%	5%	12%	7%	18%	10%
Louisiana	9% <sup>e</sup>	4%	8%	4%	14%	8%
Illinois	3%	3%	7%	11%	11% <sup>b</sup>	2%
Mississippi	5%	5%	6%	8%	10%	15%
Tennessee	4%	5%	7%	2%	6%	0%
Texas	12%	16%	10%	10%	5%	0%
Missouri	2%	3%	6%	1%	3%	1%
Michigan	3%	3%	5%	4%	2%	0%
Indiana	3%	3%	5%	2%	2%	0%
Wisconsin	6% <sup>bd</sup>	2%	3%	2%	1%	0%
Ohio	5%	3%	1%	0%	1%	0%
Arkansas	6% <sup>bd</sup>	1%	0%	0%	0%	0%
Kentucky	1%	1%	0%	0%	0%	0%
Iowa	0%	1%	0%	0%	0%	0%

2018 day trip n=153; 2019 day trip=160; 2021 day trips n=113

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

# Comparing Non-Target Trips Year-Over-Year

General Activities SPRING	2018		2019		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Beaches	61% <sup>bd</sup>	35%	75%	31%	64% <sup>b</sup>	43%
Dining out	48% <sup>d</sup>	23%	68%	32%	61% <sup>b</sup>	37%
Relaxing	57% <sup>bd</sup>	23%	60%	30%	56% <sup>b</sup>	36%
Shopping	36%	27%	53%	18%	47% <sup>b</sup>	19%
Swimming	36% <sup>bd</sup>	20%	47%	15%	38% <sup>b</sup>	19%
Sightseeing	22%	14%	39%	19%	36% <sup>b</sup>	18%
Hiking on trails	7%	3%	15%	6%	18% <sup>b</sup>	10%
Watching wildlife	17% <sup>d</sup>	8%	11%	5%	18% <sup>b</sup>	8%
Exercise/Working out	10%	5%	12%	8%	14% <sup>b</sup>	4%
Historical sites	11%	8%	12%	6%	14% <sup>b</sup>	3%
Fishing	11%	10%	17%	6%	13% <sup>b</sup>	4%
Visiting friends/relatives who live in the area	13%	8%	9%	13%	13%	10%
Photography	15% <sup>d</sup>	7%	13%	6%	13%	11%
Shelling	19% <sup>bd</sup>	5%	17%	11%	11%	10%
Bicycle riding	9%	7%	8%	4%	10%	5%
Visiting a spa	4%	4%	6%	6%	9% <sup>b</sup>	3%
Boating or sailing	8%	4%	10%	4%	9% <sup>b</sup>	4%
Concerts and nightlife	17% <sup>d</sup>	8%	11%	3%	9%	5%
Dolphin tour	6%	5%	11%	4%	8% <sup>b</sup>	2%
Kayaking/Canoeing/Paddle boarding	4%	3%	7%	2%	8% <sup>b</sup>	2%
Birdwatching	9%	10%	4%	4%	8%	5%
Festivals or special events (non-sports events)	7% <sup>d</sup>	1%	6%	4%	6%	3%
Golfing	5%	3%	5%	4%	6%	3%
Sporting events	2%	1%	4%	4%	4%	3%
Scuba diving/Snorkeling	3%	3%	6%	4%	4%	3%
Parasailing/Jet skiing	4%	3%	6%	4%	4%	3%
Tennis	5%	1%	2%	4%	3%	3%

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

2018 day trip n=153; 2019 day trip=160; 2021 day trips n=113  
a / b indicate statistically significant differences at the 95% level.

# Comparing Non-Target Trips Year-Over-Year

Specific Attractions SPRING	2018		2019		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Tanger Outlets	17% <sup>d</sup>	8%	35%	16%	19%	18%
Gulf State Park	9%	5%	19%	4%	15%	12%
The Wharf	9% <sup>d</sup>	1%	21%	6%	15% <sup>b</sup>	7%
Dauphin Island	10%	7%	12%	10%	11% <sup>b</sup>	4%
Fort Morgan Historic Site	5%	5%	12%	5%	11% <sup>b</sup>	4%
Alabama's Coastal Connection Scenic Byway	9%	5%	9%	6%	10%	5%
Battleship USS Alabama	6%	5%	11%	10%	8%	7%
Alabama Gulf Coast Zoo	7%	4%	13%	7%	8%	8%
Adventure Island	4%	4%	7%	3%	6%	4%
The Track	3%	2%	3%	3%	5%	3%
National Naval Aviation Museum	1%	4%	6%	6%	4%	4%
Waterville	1%	1%	4%	3%	4%	4%
OWA Park	3%	0%	3%	9%	4%	11% <sup>a</sup>
Bellingrath Gardens	2%	1%	3%	3%	3%	5%
Hugh S. Branyon Backcountry Trail	3%	1%	0%	1%	3%	2%
Bon Secour National Wildlife Refuge	2%	2%	5%	0%	2%	3%

2018 day trip n=153; 2019 day trip=160; 2021 day trips n=113  
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 tables above.