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

Visitor Profile Research

Summer 2021

Strategic Marketing & Research Insights LLC

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

Introduction

Visitor Profile Research – Summer 2021

Background

- 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.
- The COVID-19 pandemic brought with it global disruptions to travel. GS/OB faced closures from late March 2020 through April 2020. However, while many destinations were closed or had limited availability during spring 2020 and portions of the summer2020 season, GS/OB reopened beaches and Welcome Centers April 30. While there has generally been a recovery, leisure travel has remained low globally since spring 2020. In late summer 2021, however, the Delta variant of the coronavirus brought a surge in cases and renewed concerns about leisure travel.
- Another challenge facing GSOBT was a shift in visitor types during this period as some consumers unaccustomed to travel ventured out to leisure destinations, in some cases fortified with stimulus dollars. This research examines patterns in visitor characteristics.
- This report is the second of four seasonal reports for 2021.

Research Objectives

Gather information on summer visitors, determining visitor origins and demographics

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

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

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

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

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

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

Methodology

- This report presents information collected through online surveys of visitors to Gulf Shores, Orange Beach or Fort Morgan during summer 2021 (June through August).
- Potential respondents were screened to ensure they were travelers to the Gulf Shores/Orange Beach area and were at least 25 years of age.
- Travelers were asked about multiple trips.
- Target data is weighted to match the destination's actual occupancy rates (hotel and vacation rental) over the relevant time period, which in summer 2021 was 84% condo/vacation rentals and 16% hotel stays.
- Surveys were conducted in the markets where Arrivalist's mobile data indicated were home markets for devices that spent time in the Gulf Shores/Orange Beach area during the summer months.

Number of trips represented in the data	Summer 2021
Target trips (stayed 1-30 nights in paid accommodations)	350
Non-target trips (visited but did not stay overnight)	149

GULF SHORES &
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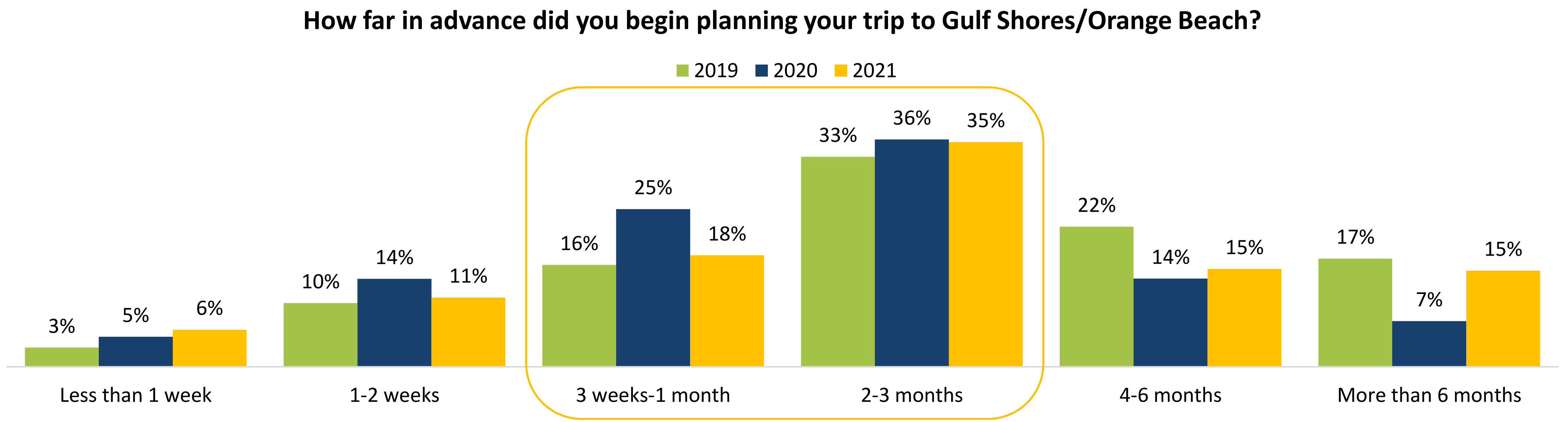
Alabama's White-Sand Beaches

Detailed Findings

Visitor Profile Research – Summer 2021

Travel Planning

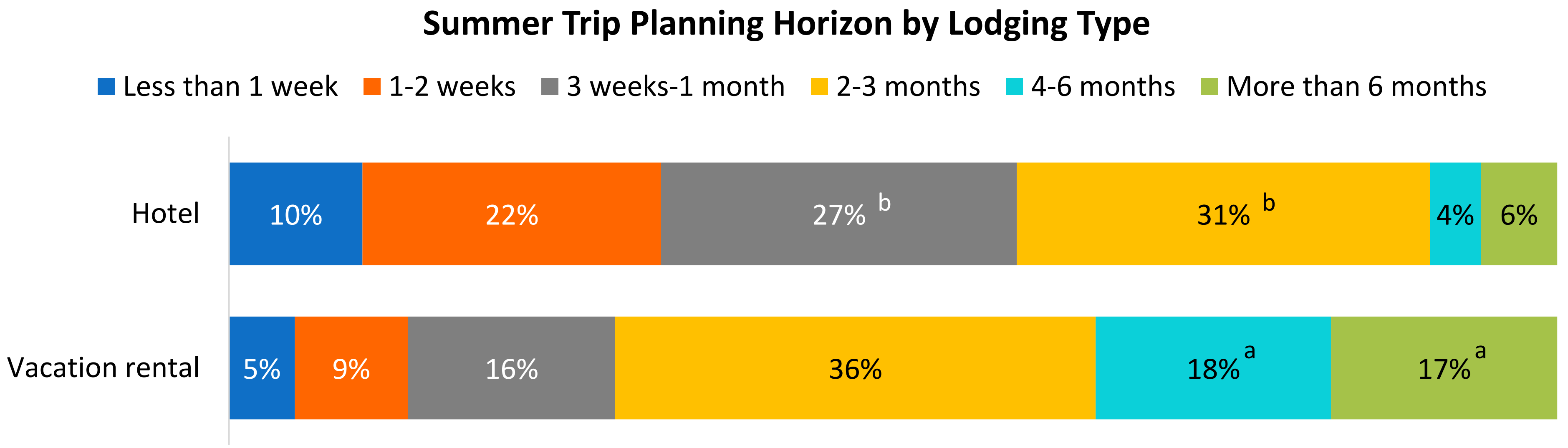
- The spike in short-term visit planning we saw in 2020 – brought on by uncertainty about what destinations were open, whether it was safe to travel, and what safety behaviors would be required – appears to be over. The travel planning horizon looks much more similar to pre-pandemic 2019, with a third of trips planned 2-3 months ahead of travel, and another 30% planned 4 months or longer ahead of time.



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

Travel Planning – Hotel vs. Condo Rental

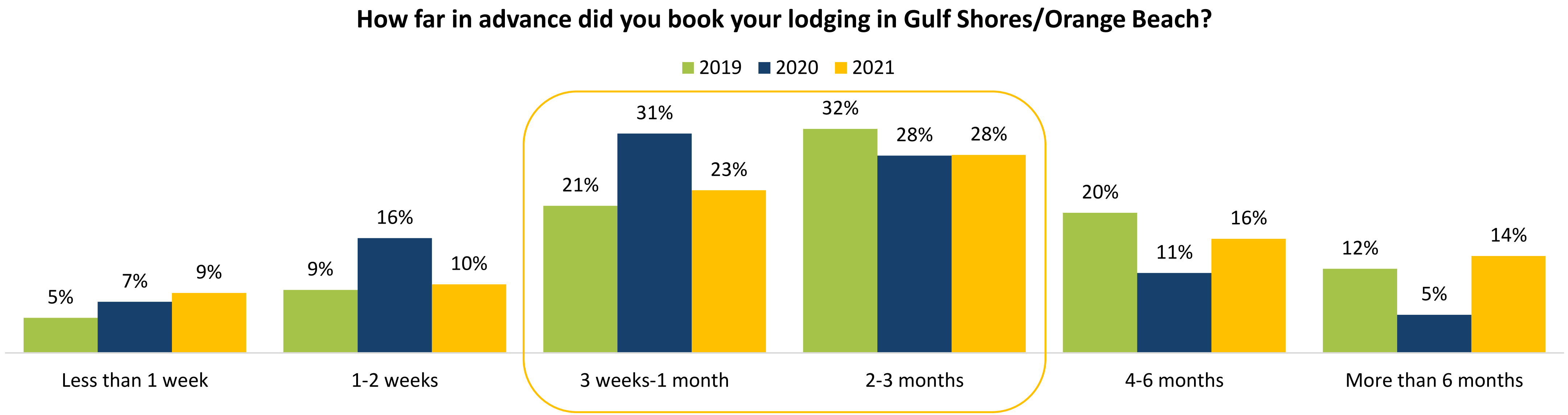
- Hotel stayers continue to plan in the short term, versus those who stay in condos.
- There is still a high share of hotel stays planned within a month of travel at 59%, but this is down from 2020’s high of over two-thirds. Pre-pandemic, just over a third of hotel trips were planned in a month or less.



Vacation rental/condo n=141 (a); Hotel/motel n=209 (b); a / b indicate statistically significant differences at the 95% level.
Question text: How far in advance did you begin planning your trip to Gulf Shores/Orange Beach? Response options as shown in graph above.

Travel Planning – Lodging

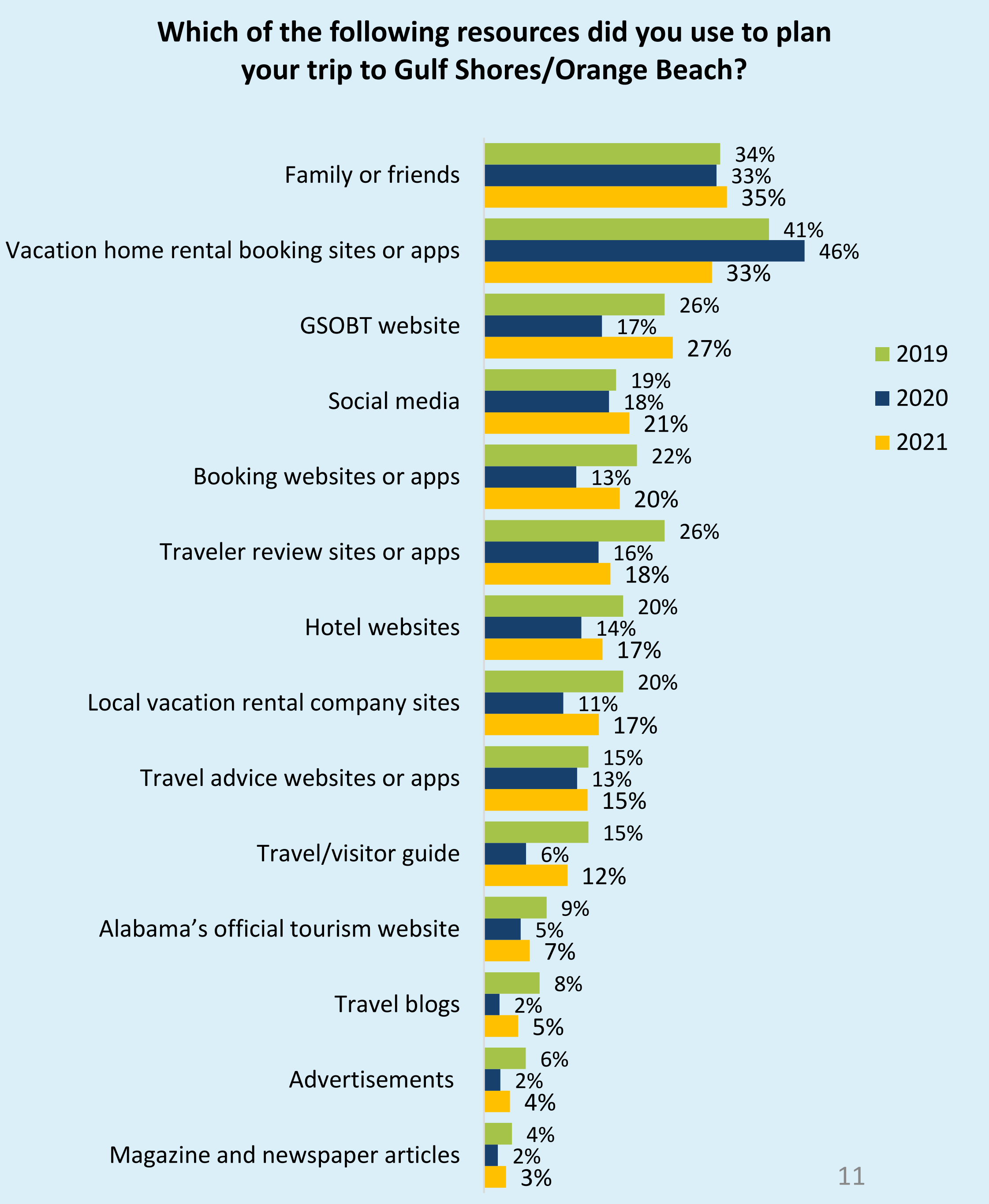
- As with trip planning overall, lodging bookings are returning to normal. While half of lodging bookings were made 3 weeks to 3 months ahead of travel, nearly a third of trips booked lodging 4 months or more ahead of time, which is in line with pre-pandemic behavior.



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

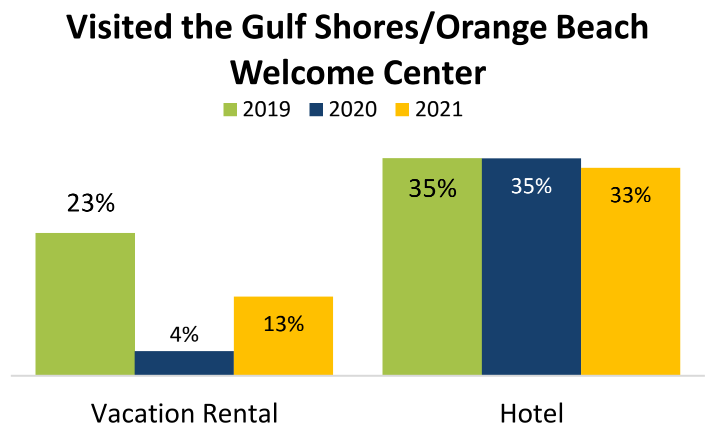
- The top summer visit planning resources remain vacation home rental sites/apps and family and friends; however, family and friends has taken the top spot as most commonly used resource. We see this among day trip visitors as well.
- Usage of the GSOBT website also looks more like the pre-pandemic measure.
- More than half (52%) of summer visitors went to the GSOBT website for COVID information prior to visiting (42% of summer visitors did not look for COVID information anywhere before visiting).
- Most visitors (76%) looked for weather information prior to a visit; 42% went to the GSOBT website for this information.



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.

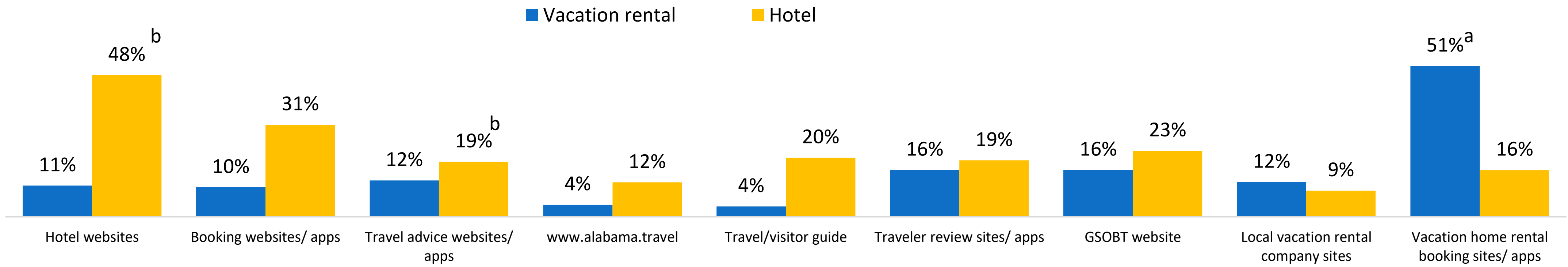
Travel Planning – Hotel vs. Condo Rental

- Difference in travel planning resources by lodging type are similar to prior summers, with lodging resource aligning with lodging type.
- We continue to see a third of hotel stayers visiting a Welcome Center.
- The share of condo stayers who visited a GS/OB Welcome Center has rebounded from its 2020 low, when limited hours and health concerns were a factor.



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

Trip planning resources with biggest difference by lodging type

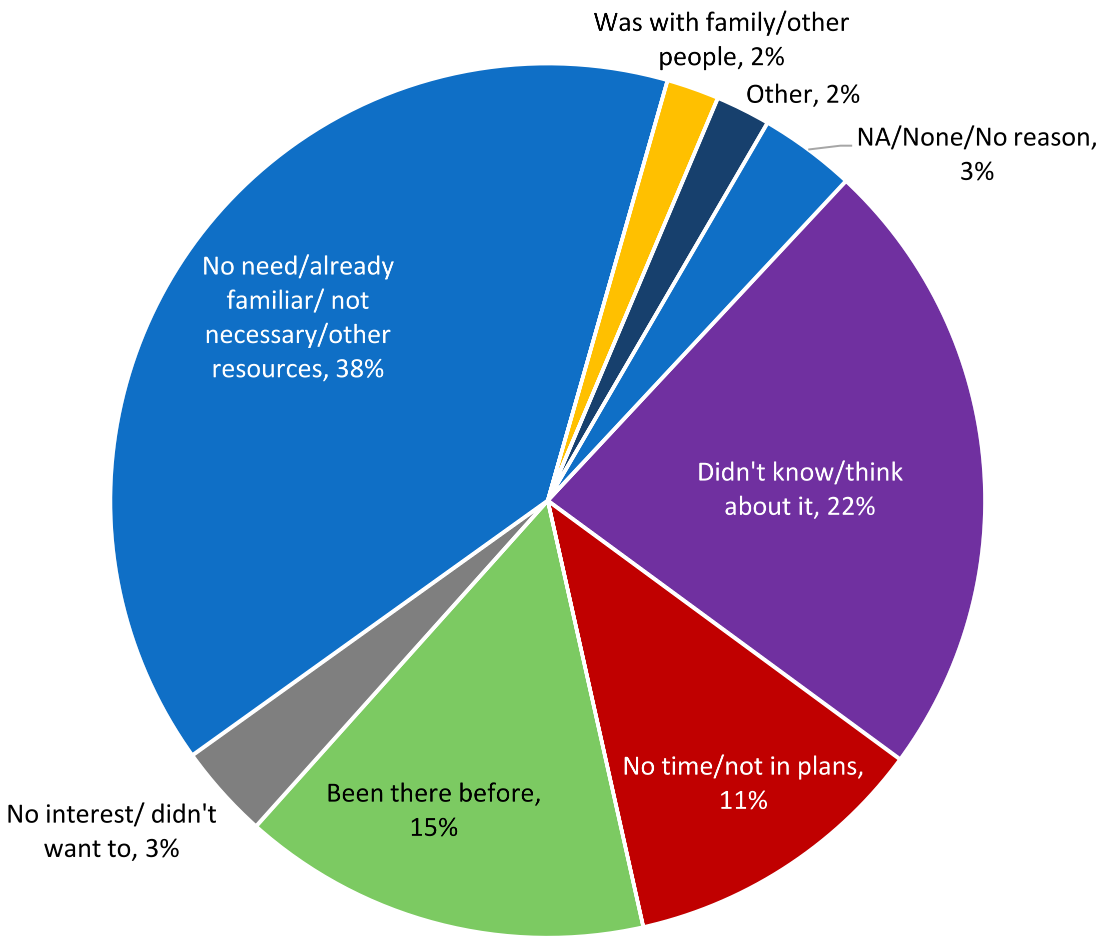


Vacation rental/condo n=141 (a); Hotel/motel n=209 (b); a / b indicate statistically significant differences at the 95% level.
Question text: Which of the following resources did you use to plan your trip to Gulf Shores/Orange Beach? ? Response options as shown in graph.

Travel Planning

- Of those who did not visit a Welcome Center, the most common reason remains already being familiar with the destination.

Why didn't you visit the Welcome Center?

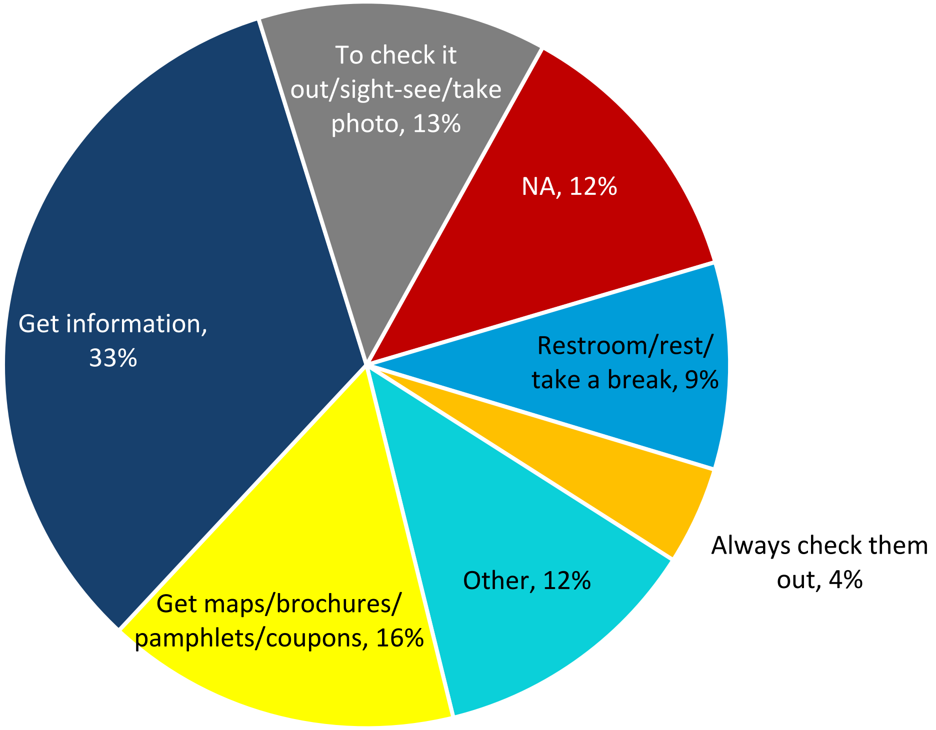


Question text: Why didn't you visit the welcome center? [Open ended response]

Travel Planning – Welcome Center Visitors

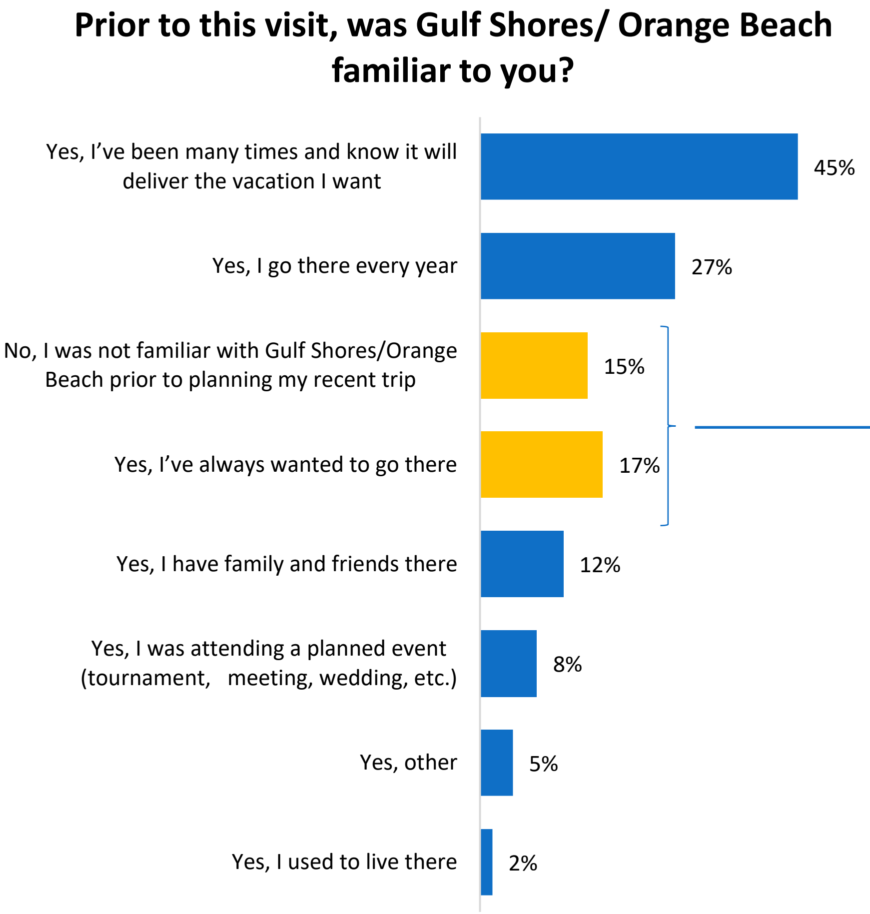
- The main reason for stopping at a GSOBT Welcome Center was to get information. This is consistent with the less-familiar hotel stayers using the Welcome Centers at a higher rate than condo-stayers. Lower familiarity creates a need for more information.

Why did you visit the welcome center?

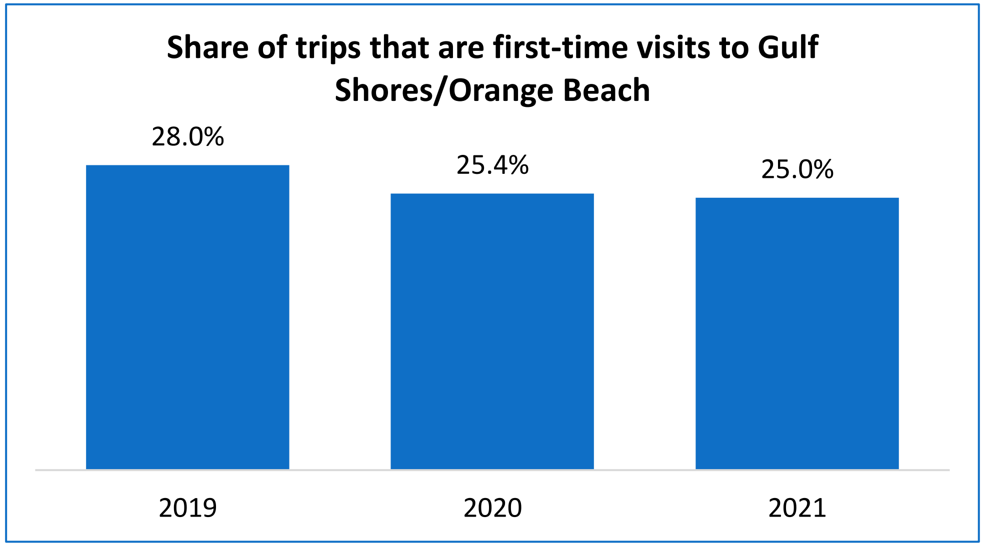


Question text: Why did you visit the welcome center? [Open ended response]

Trip Characteristics



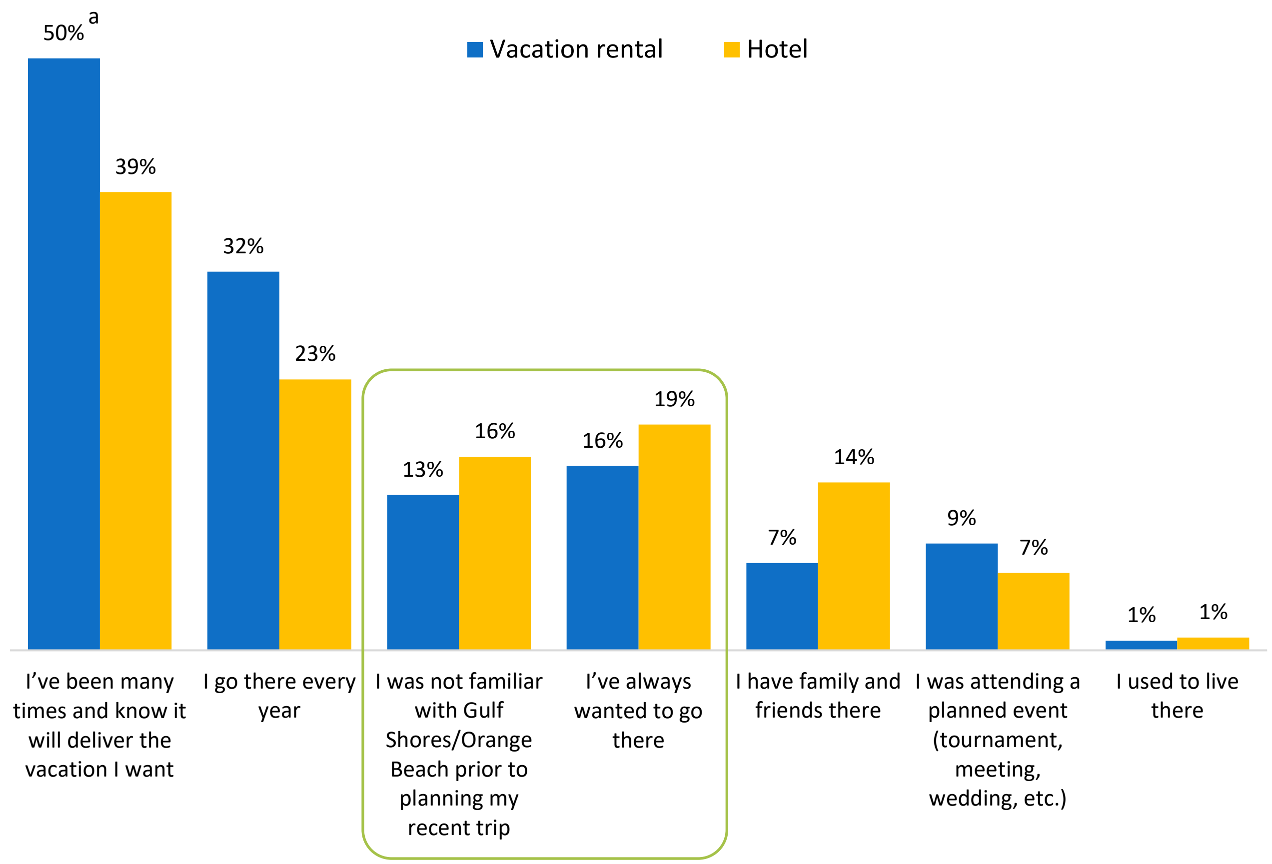
- Summer 2019 saw a lift in first-time visitors, and that trend continues. A quarter of summer visitors had not been to GS/OB before.
- The majority of visitors are repeat visitors who have been to GS/OB many times/every year.



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

Vacation renters are repeat visitors. Hotel stayers tend to be new visitors. There is also a higher share of hotel stayers who came to the area to visit friends and family.

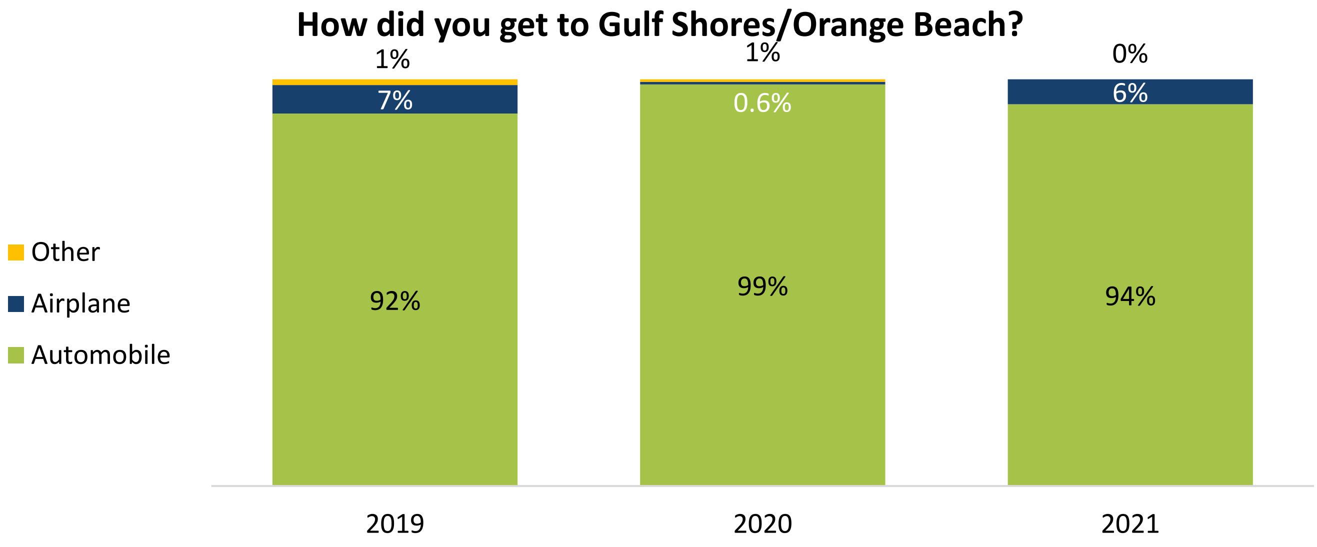
Differences in Reasons for Familiarity



Vacation rental/condo n=141 (a); Hotel/motel n=209 (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

- As in prior summers, the vast majority of visitors drove.
- The very few fly visitors flew into Panama City and New Orleans.



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

Trip Characteristics

- GS/OB beaches continue to be the main summer visit activity, followed by dining out, relaxing, and swimming. More than half of summer trips include these activities.
- Shopping saw a rebound from last summer. In fact, in summer 2021, visitors engaged in more activities, and a broader array of activities. potentially as more places reopened.
- Among vaccinated visitors, beach usage and shopping are higher (75% and 53%, respectively) than among the unvaccinated. However, dining out is higher among the unvaccinated (64%). The pandemic continues to impact leisure activity participation as consumers find their comfort levels.

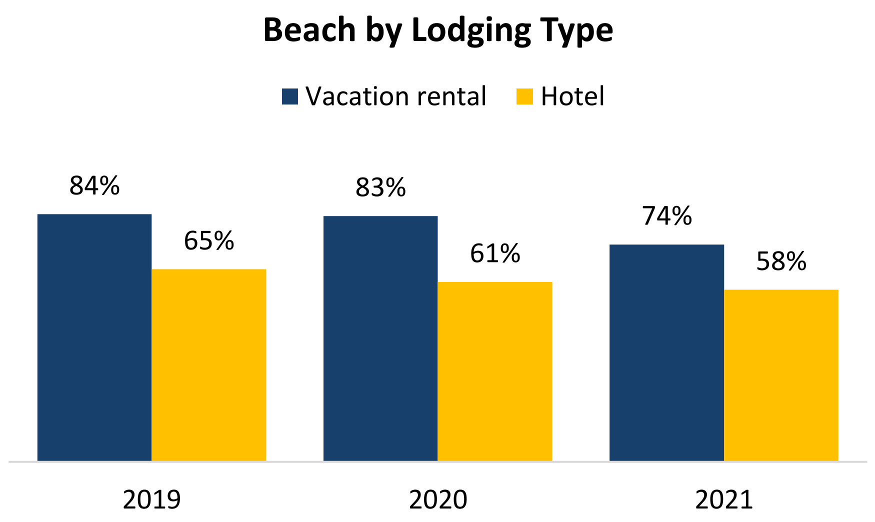
Summer trip participation	2019	2020	2021
Beaches	81%	80%	71%
Dining out	67%	66%	58%
Relaxing	65%	63%	54%
Swimming	58%	64%	52%
Shopping	54%	43%	48%
Tanger Outlets	32%	22%	23%
Sightseeing	37%	21%	23%
The Wharf	28%	16%	19%
Fishing	14%	14%	18%
Shelling	19%	15%	18%
Gulf State Park	13%	12%	14%
Watching wildlife	16%	10%	13%
Photography	12%	7%	13%
Alabama's Coastal Connection	14%	8%	12%
Hiking on trails	12%	7%	12%
Dauphin Island	13%	8%	11%
Exercise/Working out	15%	10%	10%
Dolphin tour	14%	10%	10%
Boating or sailing	11%	11%	10%
Family/friends reunion	8%	8%	9%
Visiting friends/family in the area	12%	8%	9%
Bicycle riding	7%	4%	9%
Adventure Island	15%	3%	9%
Kayaking/Canoeing/Paddle boarding	8%	5%	9%
The Track	12%	8%	7%
OWA Park	4%	4%	7%

Cont'd.	2019	2020	2021
Battleship USS Alabama	12%	6%	7%
Golfing	10%	3%	7%
Concerts and nightlife	9%	4%	7%
Historical sites	13%	4%	6%
Alabama Gulf Coast Zoo	13%	6%	6%
Fort Morgan Historic Site	12%	6%	5%
Scuba diving/Snorkeling	5%	4%	5%
Birdwatching	9%	3%	4%
National Naval Aviation Museum	8%	2%	4%
Parasailing/Jet skiing	6%	5%	4%
Visiting a spa	8%	3%	4%
Festivals or special events	7%	2%	4%
Waterville	7%	3%	4%
Coastal Birding Trail			4%
Sporting events	3%	3%	3%
Hugh S. Branyon Backcountry Trail	3%	1%	3%
Civil War History Trail			2%
Bellingrath Gardens	3%	2%	2%
Bon Secour National Wildlife Refuge	5%	3%	2%
Tennis	6%	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

- As we typically see, vacation renters are more likely to feature beach visits in their trip, and more likely to choose GS/OB because of the beach.
- Directionally, beaches are also the leading motivator of visits from hotel stayers.

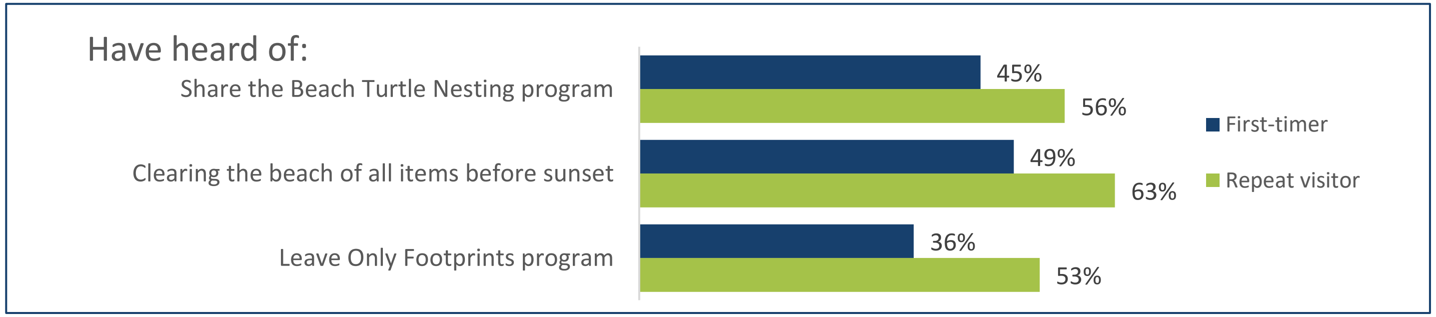


Question text: What attractions and activities did you visit or participate in while in Gulf Shores/Orange Beach on your trip? Response chosen: beach Condo/vacation rental 2021 n=141 (a); Hotel/motel n=209 (b)

Trip Characteristics

- Visitors chose GS/OB for its beaches and to relax, swim, dine out, and shop.
- The importance of area beaches reinforces the need to protect and preserve this important asset, as GSOBT has done with its Leave Only Footprints program and other initiatives.
- Repeat visitors remain more aware of these initiatives than new visitors, although more had heard of the programs this year than last.

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



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

Trip Characteristics

- Summer trip spending is up in both lodging types, particularly in the categories of lodging and meals. This is consistent with higher ADR for summer 2021.

ALL TARGET VISITORS

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

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

TARGET VISITORS BY LODGING TYPE

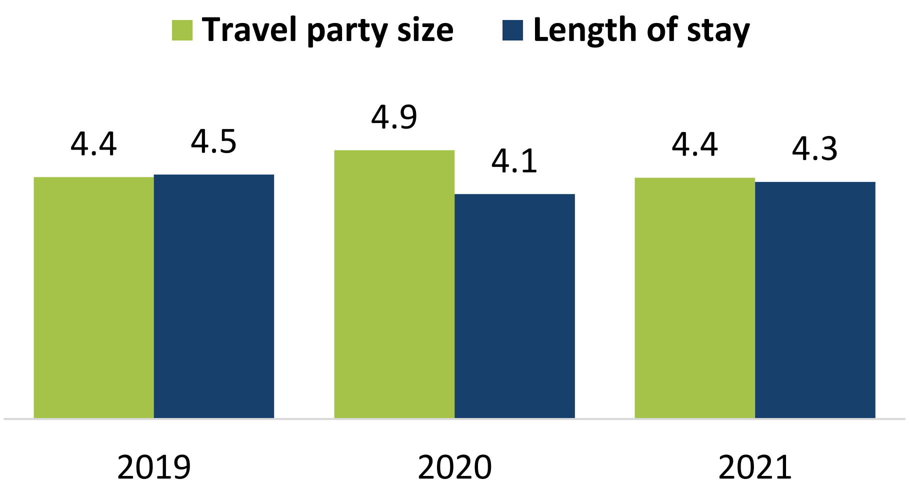
Average Travel Party Expenditures per Trip – SUMMER	2019		2020		2021	
	Vacation rental	Hotel	Vacation rental	Hotel	Vacation rental	Hotel
Lodging	$1,429	$519	$1,363	$504	$1,751[a]	$583
Meals/food/groceries	$441	$290	$422	$258	$690	$301
Shopping	$278	$260	$210	$193	$217	$265
Recreation or entertainment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

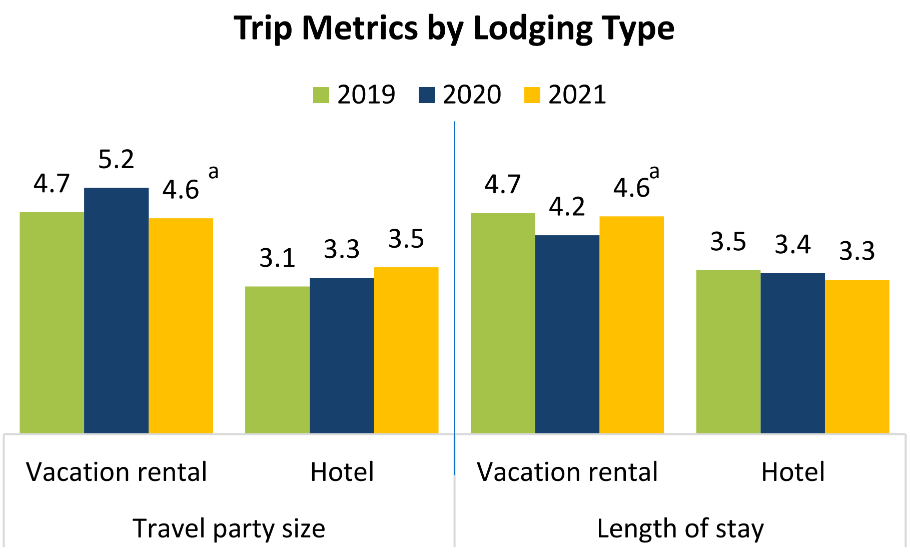
Condo/vacation rental 2019 n=200; 2020 n=188; 2021 n=141
Hotel/motel 2019 n=300; 2020 n=213; 2021 n=209

Question text: To help us better understand the economic impact of tourism, what was the approximate amount of money your travel party spent while in Gulf Shores/Orange Beach on your trip? [Category prompts] Open-ended numeric responses. a / b indicate statistically significant differences at the 95% level.

Travel Party Characteristics

- Travel party sizes are down from 2020, and back in line with 2019 measures. Hotel travel parties show growth, with vacation rental travel parties smaller than in 2020.
- Length of stay remains over 4 nights. Vacation rental stays are longer than in 2020, while hotel stays continue to shorten.





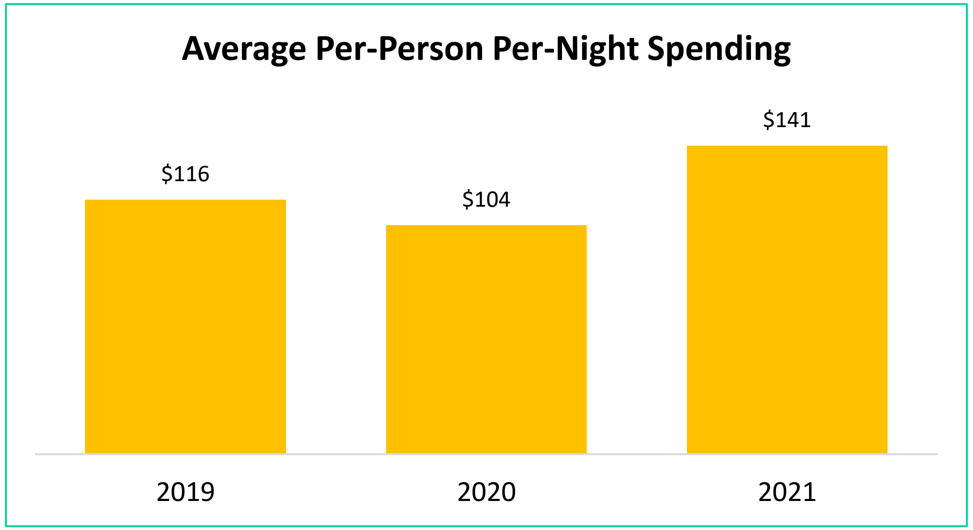
Question text: Including yourself, how many people were in your travel party? How many nights did you stay in Gulf Shores/Orange Beach during this trip? If you did not stay overnight, please enter '0'. Open-ended numeric responses.

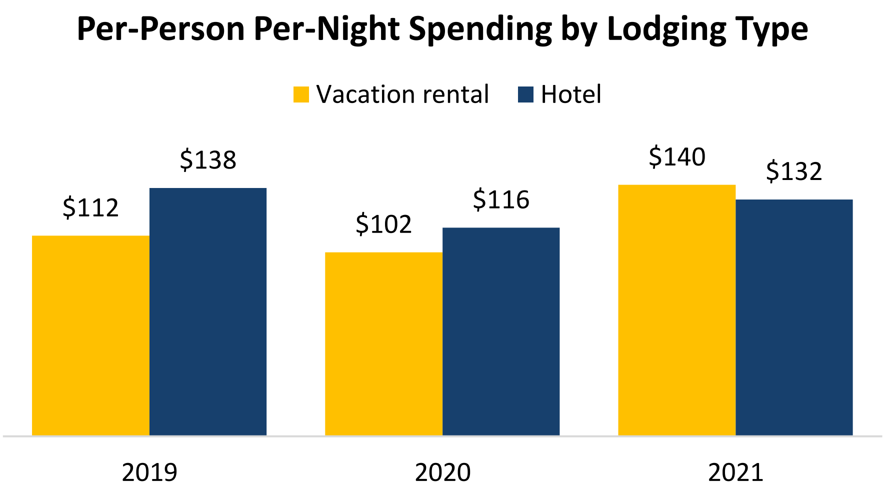
Condo/vacation rental 2019 n=200; 2020 n=188; 2021 n=141
Hotel/motel 2019 n=300; 2020 n=213; 2021 n=209

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

Trip Characteristics

- Unit spending, like overall trip spending, is higher this year than in 2020 and higher than the 2019 pre-pandemic summer measure. This is the highest per-person per-night spending for condo stayers in recent years. Unit spending for hotel stays is higher than in 2020, but still below 2019.

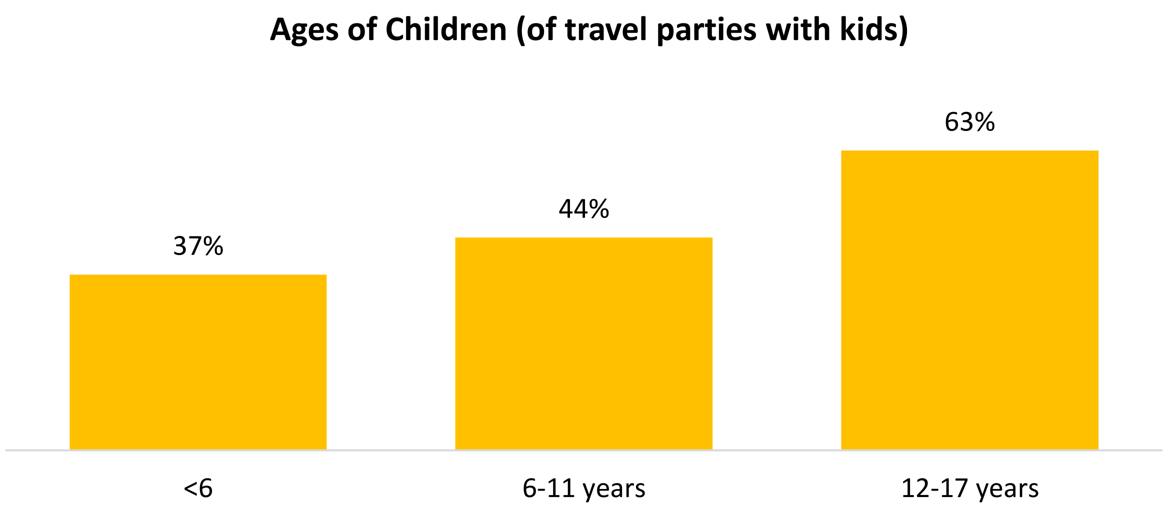




Question text: To help us better understand the economic impact of tourism, what was the approximate amount of money your travel party spent while in Gulf Shores/Orange Beach on your trip? [Category prompts]
Including yourself, how many people were in your travel party? How many nights did you stay in Gulf Shores/Orange Beach during this trip? If you did not stay overnight, please enter '0'. Open-ended numeric responses.
Condo/vacation rental 2019 n=200; 2020 n=188; 2021 n=141
Hotel/motel 2019 n=300; 2020 n=213; 2021 n=209

Travel Party Characteristics

- Half (51%) of summer travel parties include children, down slightly from 2020’s 60%.
- Summer trips tend to include more school-age children, and this year is no exception. However, we do see more older children included in travel parties this year.



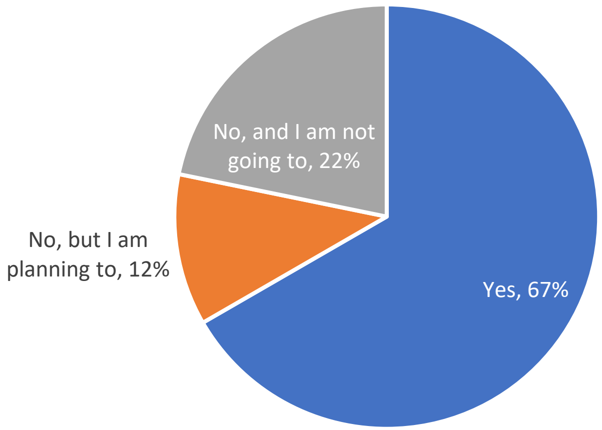
Question text: What ages were the children in your travel party? Response options as shown in graph.

Travel Party Characteristics

- Summer 2021 visitors are older than the 2020 visitor and in line with pre-pandemic travelers in terms of age.
- Household incomes are higher than those of prior visitors.
- Most summer visitors (67%) are vaccinated against COVID-19 and another 12% intend to get the vaccine.
- There is little difference by lodging type or by repeat vs. first-time visitor.

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

Have you received the COVID-19 vaccine?



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

Question text: Are you…? (Male, Female) What is your age? Are you currently…? (Married, Divorced/Separated, Widowed, Single/Never married)
Which of the following categories best represents the total annual income for your household before taxes? (Less than $35,000, $35,000 but less than $50,000, $50,000 but less than $75,000, $75,000 but less than $100,000, $100,000 or more)

Travel Party Characteristics

- Higher incomes are from hotel stayers, who are more affluent than in years past.
- Hotel stayers are also better educated, more in line with 2019.
- Although there are more retirees than in 2020, the shares are still lower than in 2019, potentially due to COVID-19 safety concerns.
- This summer's visitors are more ethnically diverse than summer 2020's and look more like pre-pandemic visitors.

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

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

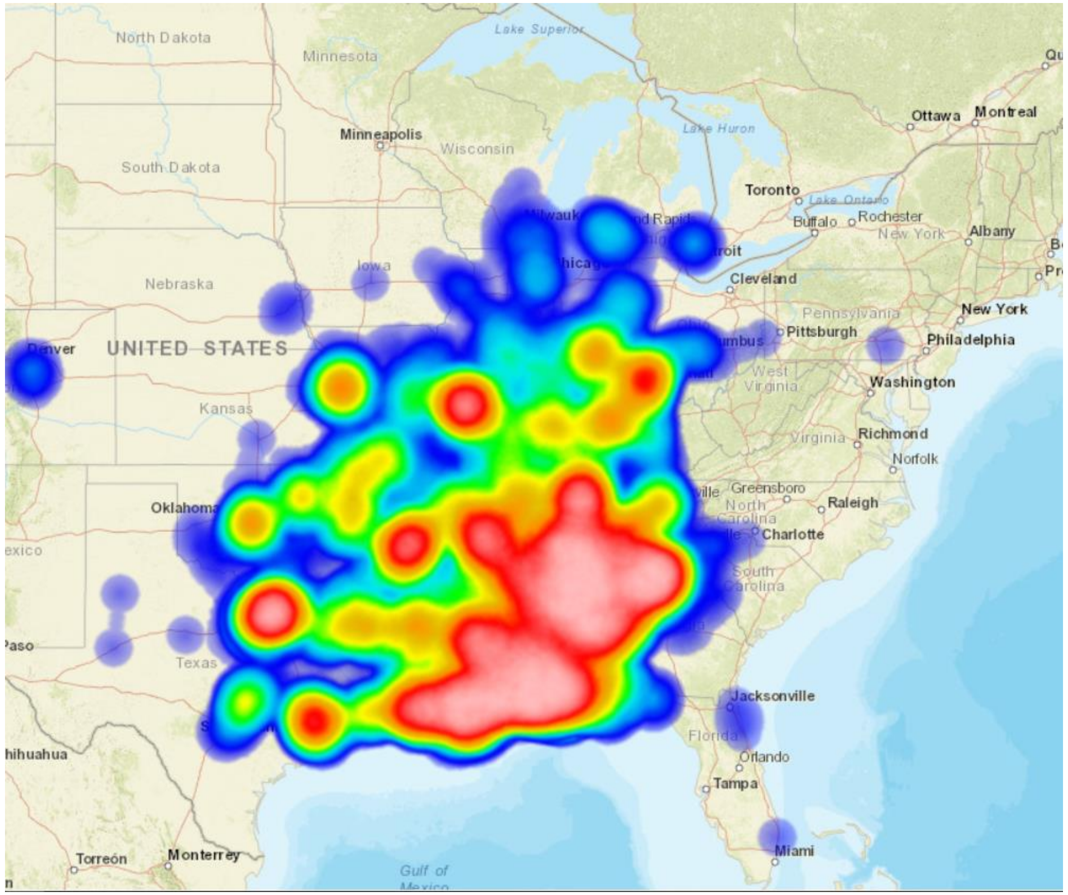
Travel Party Characteristics – New Visitors

- As a result of GSOBT marketing efforts, 2019 saw gains in higher income and more diverse visitors compared to prior years. But summer 2020 repeat visitors were less affluent, with a higher share unemployed. Summer 2021 repeat visitors look more like pre-pandemic visitors.
- New visitors, on the other hand, are older, less affluent, and more likely to be Black than in either of the past 2 years.
- Visitors who choose "other" for their occupation are asked to clarify. Those who say they work in health care, education, and office/administration remain a significant portion of these responses. There may be some value in adding these categories for future research, as well as a question about working remotely from GS/OB.

Summer demographic profile of new visitors		Repeat visitors			New visitors		
		2019	2020	2021	2019	2020	2021
Age	Average	46	43	46	44	42	46
Marital status	Married	66%	71%	68%	68%	65%	54%
	Divorced/Separated	11%	12%	13%	9%	8%	13%
	Single/Never married	19%	16%	16%	21%	23%	28%
	Widowed	3%	1%	3%	2%	4%	4%
HH income	Average	$120,347	$114,393	$120,712	$110,194	$113,124	$100,244
Education	College grad+	69%	62%	64%	65%	58%	59%
Occupation	Executive/upper management	20%	13%	18%	15%	16%	18%
	IT professional	10%	9%	8%	12%	8%	8%
	Educator	9%	9%	11%	12%	6%	10%
	Homemaker	15%	13%	9%	13%	8%	6%
	Student	1%	0%	1%	2%	0%	6%
	Small business owner	4%	4%	3%	5%	5%	3%
	Skilled trade/service	8%	12%	11%	11%	15%	13%
	Other	16%	26%	25%	13%	26%	18%
	Retired	15%	5%	11%	13%	5%	12%
	Not currently employed	3%	10%	5%	6%	9%	8%
Ethnicity	Caucasian/White	88%	95%	83%	75%	89%	71%
	African-American/Black	6%	2%	10%	12%	4%	23%
	Latino/Hispanic	2%	1%	4%	9%	5%	4%
	Asian	4%	2%	4%	5%	2%	2%
	American Indian	2%	1%	3%	1%	0%	1%
	Other	0%	1%	0%	0%	1%	0%

Travel Party Characteristics

- Heat map showing source markets of summer visitors.

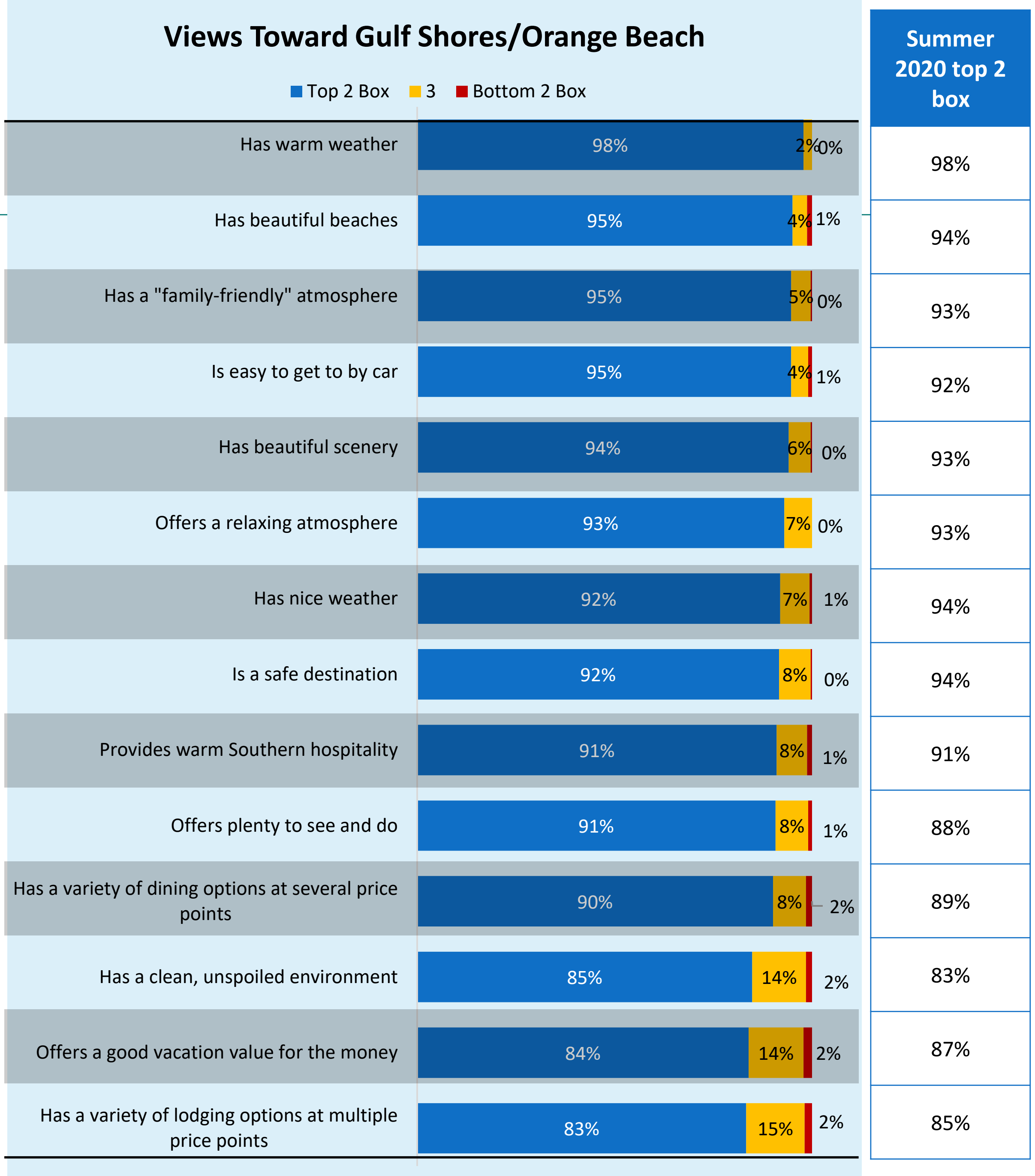


	2020	2021
Alabama	31%	36%
Louisiana	15%	12%
Mississippi	11%	11%
Tennessee	7%	6%
Texas	7%	6%
Georgia	5%	5%
Missouri	3%	4%
Arkansas	4%	4%
Florida	5%	3%
Illinois	0%	2%

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

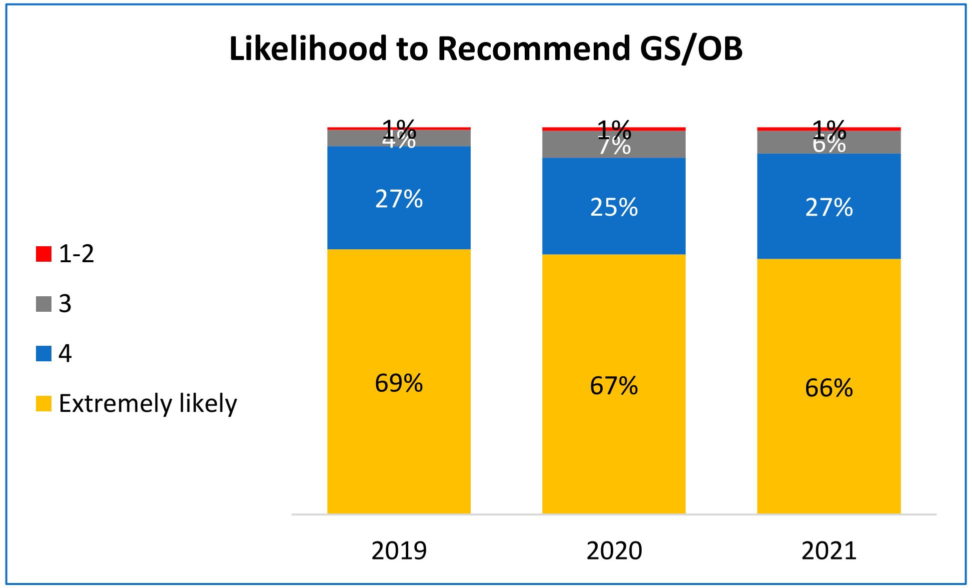
- Summer visitors continue to view GS/OB in a positive light, with more than 8 in 10 agreeing that each of these statements describes the destination.
- Warm weather and beautiful beaches remain the highest performing image attributes.
- Ratings for “has a clean, unspoiled environment” rebounded 2 points in summer 2021, after declining 6 points in summer 2020. (In summer 2019, 89% of visitors agreed that GS/OB has a clean, unspoiled environment.) The return to a more traditional visitor could be aiding this recovery, and GSOBT’s sustainability efforts are likely helping as well.



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 in line with 2020's measure.
- Condo stayers are more likely to recommend the destination than in 2020, while hotel stayers have similar likelihood as last year.



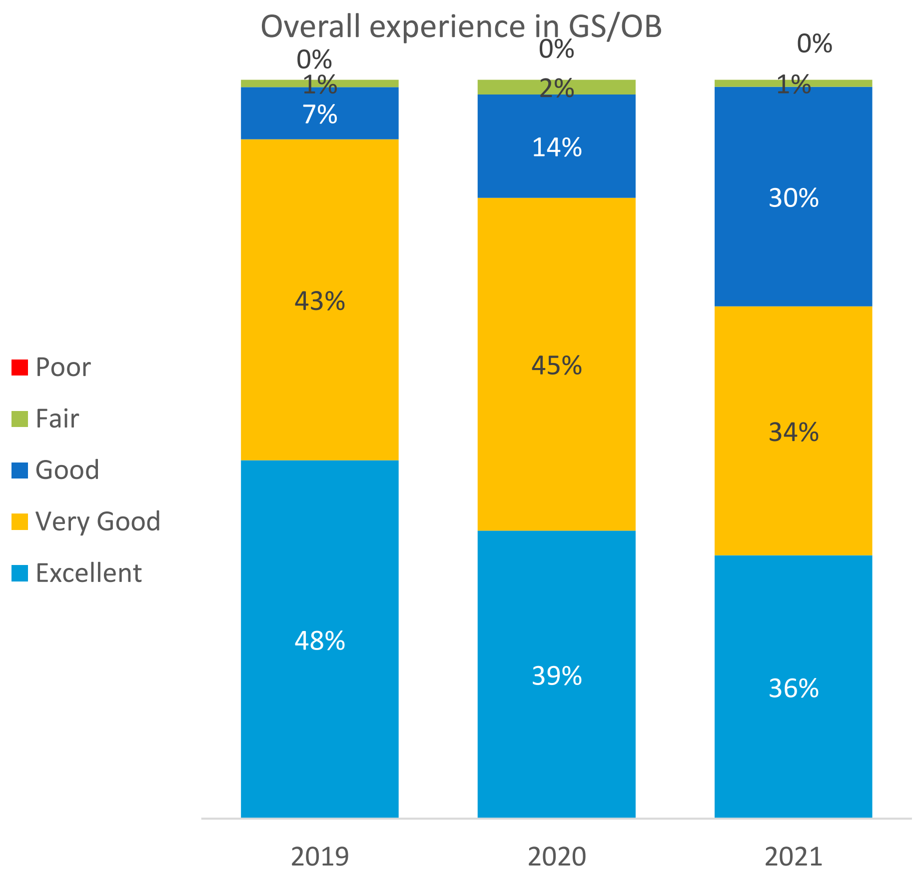
How likely are you to recommend Gulf Shores/Orange Beach to your friends or family as a destination to visit for a leisure trip? Summer visitors	2019 Top 2 Box %	2020 Top 2 Box %	2021 Top 2 Box %
Vacation rental/condo	95%	93%	96%
Hotel	95%	91%	92%

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

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

Views Toward GS/OB & Trip Satisfaction

- Overall experience ratings continued to decline year-to-year among summer visitors. While few rated the experience Poor or Fair, there has been a shift away from Excellent and Very Good and toward Good.
- In 2020, the rating decline appeared to be due to the pandemic and associated restrictions (closures of other destination beaches, closures or limited service at restaurants and attractions, masking requirements, social distancing, etc.) as well the addition of visitors who were less accustomed to leisure travel and acceptable behaviors relative to sustainability and beach environment stewardship.
- Summer 2021 appears to be suffering from pandemic safety fatigue, complicated by the same lack of staffing that plagues nearly every community right now.

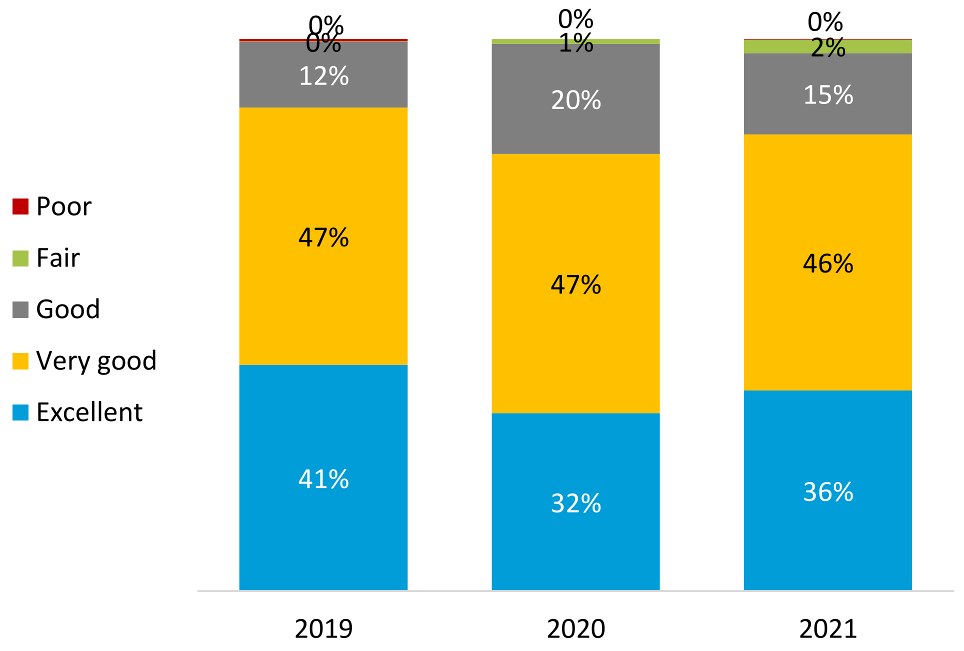


Question text: Thinking about your overall experience in Gulf Shores/Orange Beach during your trip, would you say it was…?

Views Toward GS/OB & Trip Satisfaction

- In 2018, half of visitors rated their service as excellent; in 2020, just a third of visitors did. This year represents an improvement over 2020, although service is still not back at its pre-pandemic levels.
- Staffing shortages and the ongoing pressure of the pandemic were likely the cause:
    - “Restaurants seemed under staffed but they were cordial and doing the best they could.”
    - “Lack of employees impacted service making it slow or poor employees were overworked which made for attitudes on some occasions.”
    - “We did not feel like the staff at the restaurants we visited were remotely concerned about the pandemic and the increasing rise in numbers of cases of the Delta variant.”
    - “Every food establishment was consistently understaffed, making the wait time unbelievably long. The hotel I stayed at was extremely uninvolved and disinterested in my stay and where or not I ever needed anything.”
    - “One restaurant we ate at two waitresses quit and walked out. We waited over 2 hours to eat.”
    - “Wasn’t as great as in the past. The roads are a deterrent now in Orange Beach.”

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

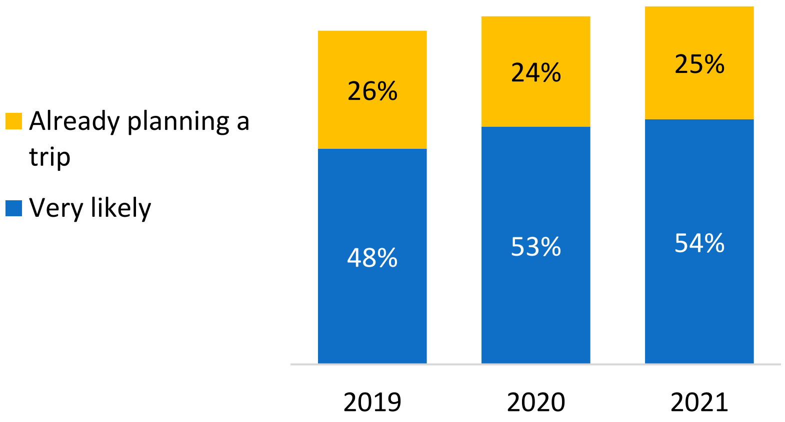


Question text: Overall, how would you rate the quality of the service you received at stores, restaurants, attractions, and lodging establishments in Gulf Shores/Orange Beach?
Response options: Poor, Fair, Good, Very good, Excellent

Views Toward GS/OB & Trip Satisfaction

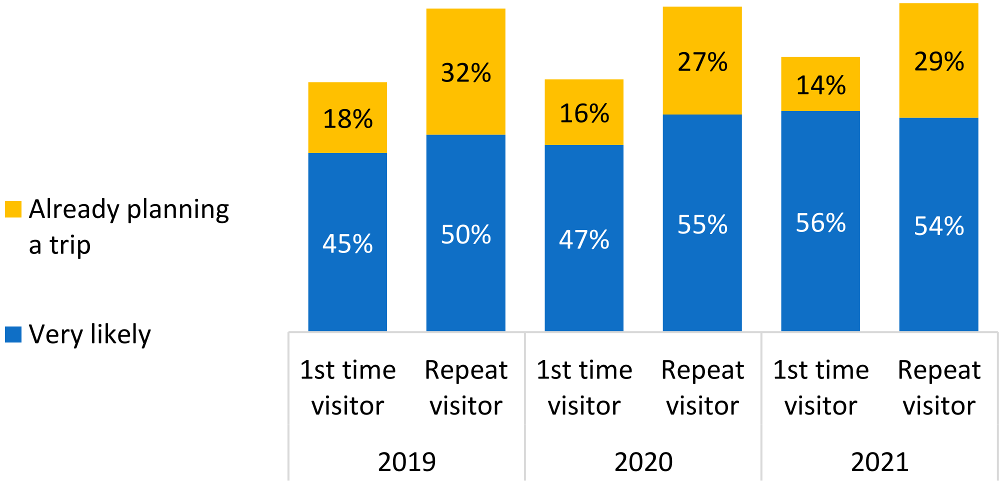
- Likelihood to return remains high, possibly buoyed by optimism about a resolution to the pandemic. A quarter of summer 2021 visitors are already planning to return next year.
- Among repeat visitors, intent to return remains strong. There have been shifts in likelihood to return among first-time visitors, which could be related to shifting demographics; overall, this metric remains strong.

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	58%
I go there every year	46%
I have family and friends there	12%
I've always wanted to go there	11%
I was attending a planned event (tournament, meeting, wedding, etc.)	7%

Likelihood to visit GS/OB in the next year

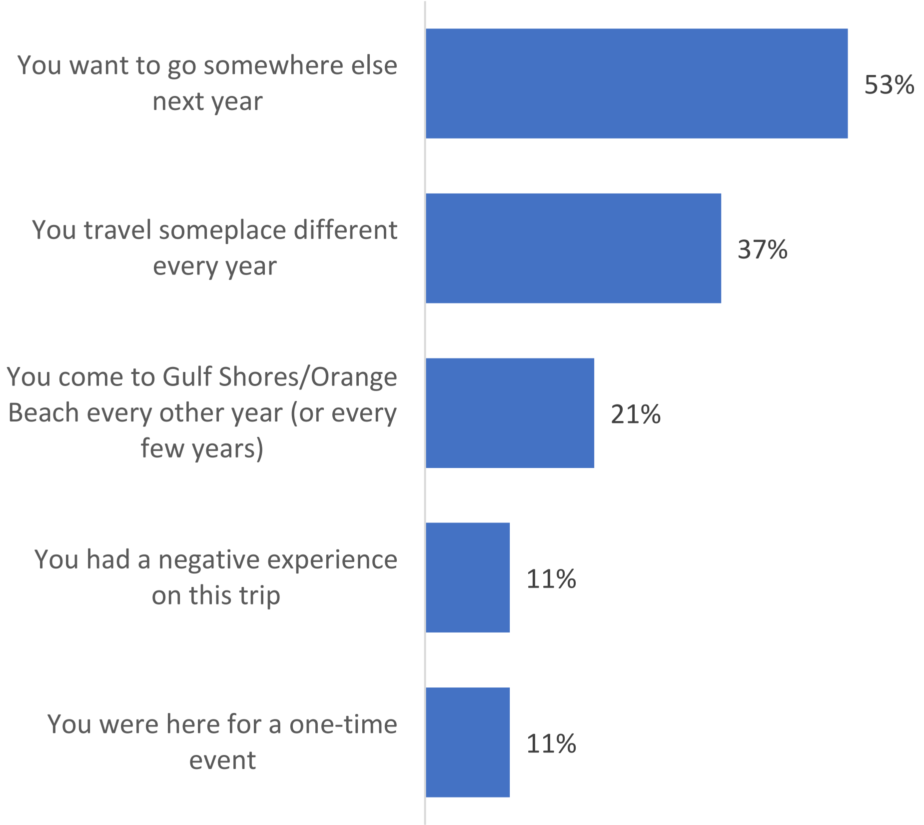


Question text: How likely are you to visit Gulf Shores/Orange Beach in the next year? Response options: Not at all likely, Not very likely, Somewhat likely, Very likely, Already planning a trip

Views Toward GS/OB & Trip Satisfaction

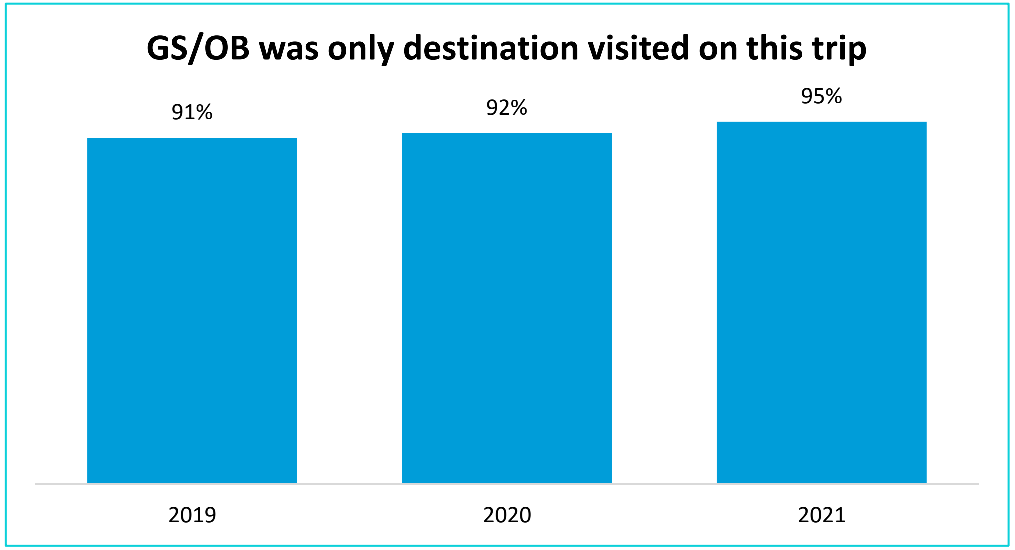
- Very few visitors have no likelihood to visit GS/OB again in the coming year; only 2 are not at all likely and 19 are not very likely (including day trippers).
- Those who said they were not at all or not very likely to visit again were asked why. Most of the responses are typical of what we see when we ask travelers this: consumers choose *for* a different destination rather than *against* GS/OB. As more destinations reopen, there will be increased competition for travelers.
- There were a couple of comments that suggested an opportunity related to the tourism product:
  - "It's more of a family/resort environment. I no longer have kids so I would like more options for adults."
  - "Orange Beach is a reunion spot for the family but with the virus..."
  - "We were simply shocked by the lack of acknowledgment of a global pandemic by the locals. I didn't feel welcome because I was trying to protect myself. It doesn't lead me to believe that I would be safe there under any circumstances."
  - "Orange Beach has always been our 'happy place' but this time it wasn't. The way they did the medians in the road is ridiculous and impossible to just go across the street and the prices are outrageous and make it out of reach for a nice vacation."

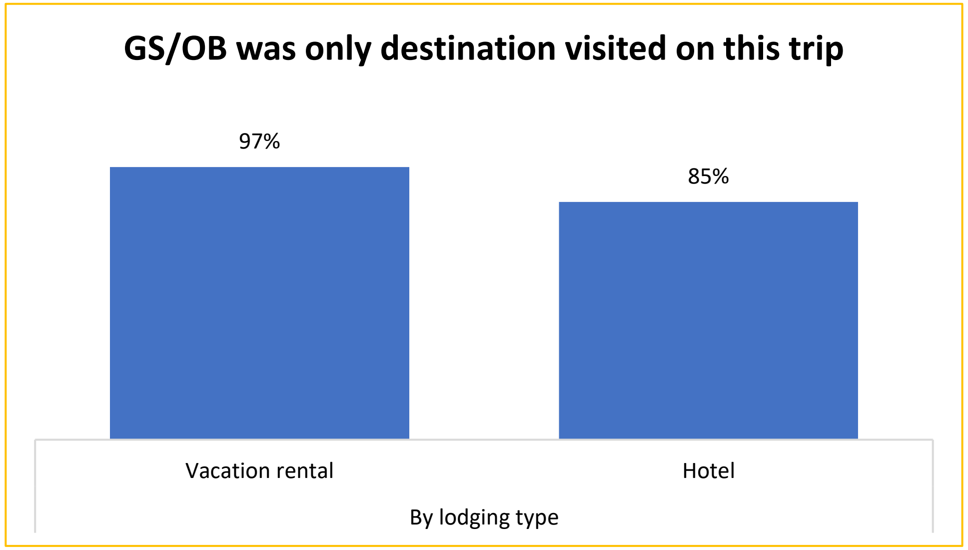
Would you say that the reason you are not likely to return next year is... ?



Destinations Visited

- GS/OB summer trips remain single-destination trips. Nearly all condo stayers visited only GS/OB. Hotel stayers are more likely to visit another destination on the same trip.





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

Welcome Center Supplemental Analysis

Visitor Profile Research – Summer 2021

Welcome Center Impact

- A third of hotel stayers and just 13% of condo stayers (up from 4% in summer 2020) visited the Welcome Center this summer.
- We don't typically see length of stay impacted by Welcome Center visitation, since trip length is typically determined before a trip begins. However, summer 2021 trips that included a Welcome Center are longer than those that don't include the Welcome Center. This could be the result of promotion by GSOBT to invite visits, with those staying longer in the destination more likely to include the Welcome Center in their itinerary.
- We continue to see Welcome Center visitors participate in more activities in the destination. Promoting activities and attractions at the centers is an excellent way to introduce new visitors to the destination, and to influence repeat visitors to try things they may not have considered in prior trips.
- Summer 2021 trips include more activities – 8.1 up from 6.6 in summer 2020. This could be due to the availability of more activities as places reopen, as well as longer trips.

Summer 2021 visits	No Welcome Center	Visited Welcome Center
Length of stay	4.1	5.1
# of activities on trip	5.0	8.1

Impact on Spending

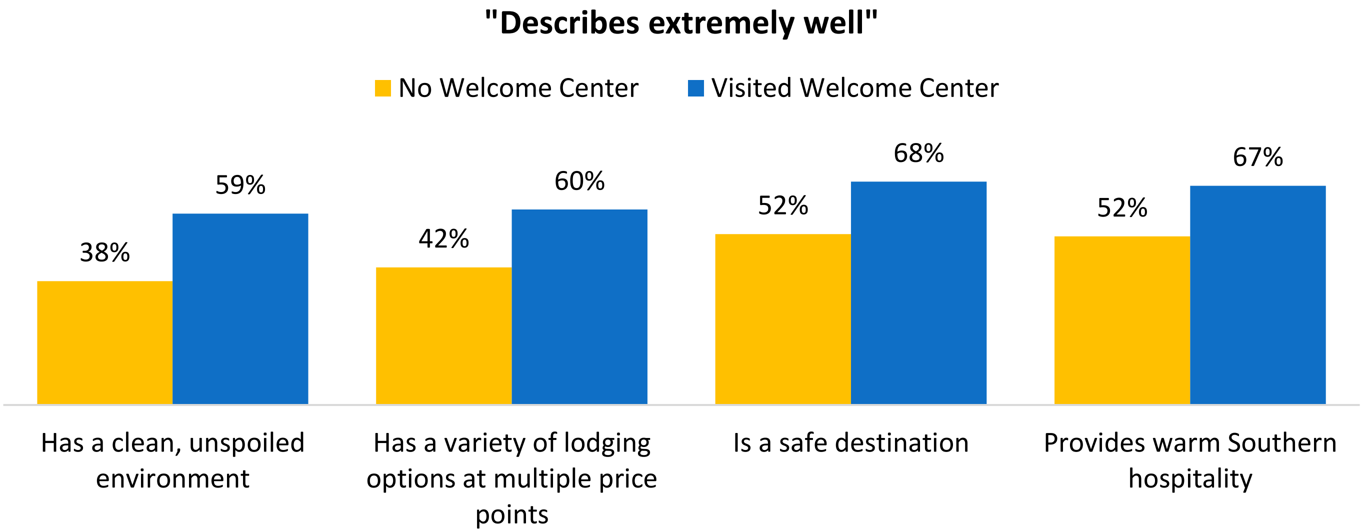
- Welcome Center visitors spent 3% more in the destination.
- Welcome Center visitation is associated with significantly higher spending in all categories other than lodging.
- Welcome Centers have little opportunity to impact decisions that are made ahead of the trip, such as lodging decisions. However, information provided at the centers could impact future lodging decisions on return trips.

Trip spending	No Welcome Center	Visited Welcome Center
Lodging	$1,164	$608
Meals/food/groceries	$333	$321
Shopping	$162	$327
Recreation or entertainment	$97	$267
Transportation within Gulf Shores	$39	$162
Other	$31	$202
Total	**$1,826**	**$1,886**

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

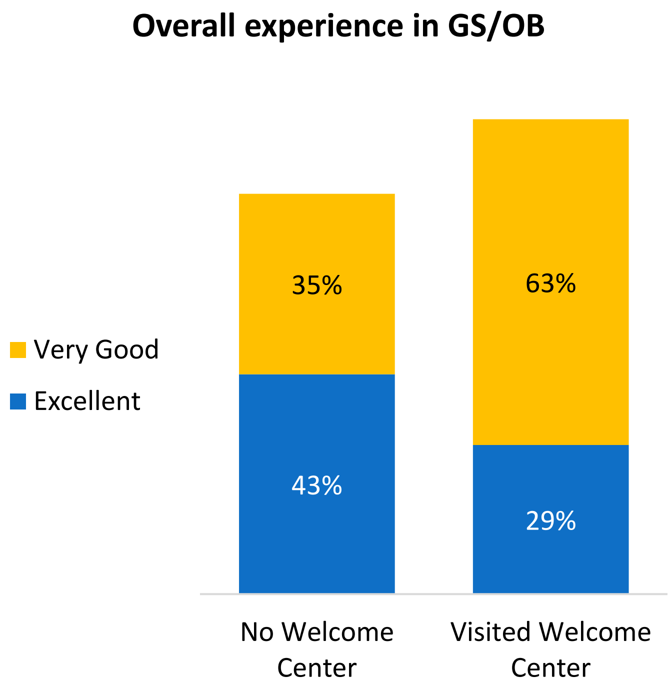
Impact on Image

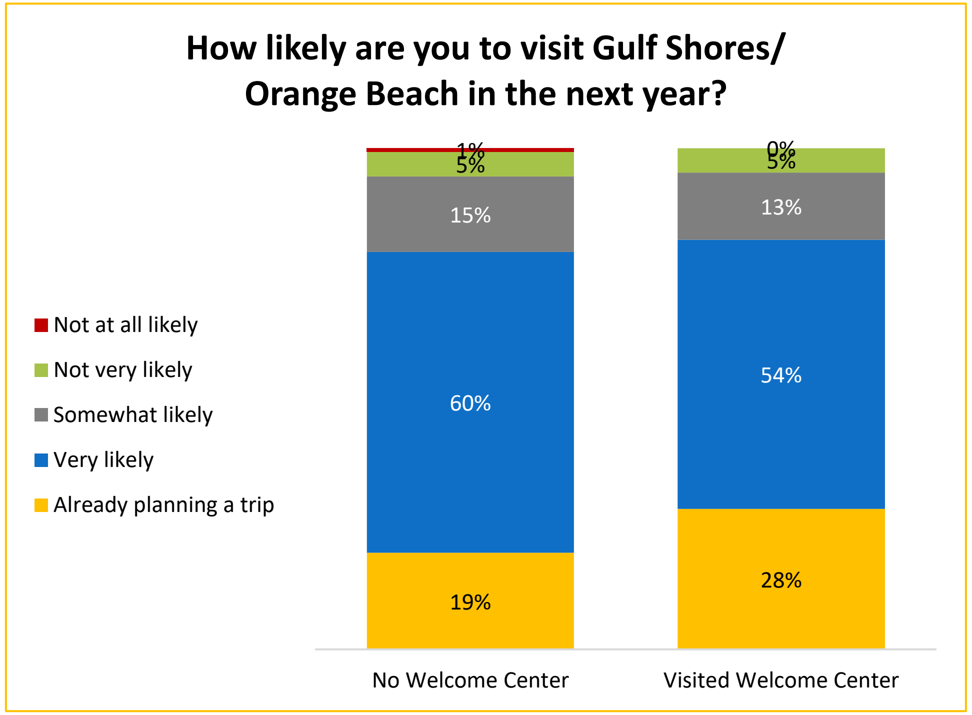
- Compared to those who did not use the Welcome Center, center visitors agree with image statements about the destination's natural assets and variety of lodging options.
- Welcome Center visitation is also associated with perceptions that GS/OB is a safe destination and provides warm Southern hospitality. These are important brand measures that help differentiate the destination from others.



Impact on Experience and Intent to Return

- Summer visitors who used a Welcome Center are more likely to report a very good overall experience in the destination, although there has been a shift since last summer from "excellent" to "very good."
- Welcome Center usage is associated with a higher likelihood to return to the destination.





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

Appendix

Visitor Profile Research – Summer 2021

Comparing Target to Other Travelers

- This year's day trip visitors have visited two-and-a-half times in the past year. This represents the beginning of an improvement over summer 2020 but remains much lower than pre-pandemic.
- GSOBT focuses analysis of non-target trips on day visits to the destination. These non-target day trips exclude local residents. Visitors from Pensacola are included.
- We also employed screening questions to ensure that day visitors are coming to Gulf Shores/Orange Beach for leisure, rather than for work.

Non-target SUMMER Day trips	2019	2020	2021
Average # visits/year	3.7	2.2	2.6
First time trips	36%	24%	16%

2019 day trip = 125; 2020 day trip =100; 2021 day trip = 149

Comparing Target to Other Travelers

Began planning summer trip	2019 Target travelers	2019 Non-target Day trip	2020 Target travelers	2020 Non-target Day trip	2021 Target travelers (a)	2021 Non-target Day trip (b)
< 1 week before trip	3%	47%	5%	66%	6%	69% [a]
1-2 weeks	10%	26%	14%	17%	11%	18% [a]
3 weeks - 1 month	16%	18%	25%	11%	17% [b]	9%
2 - 3 months	33%	7%	36%	3%	35% [b]	3%
4-6 months	22%	0%	14%	0%	15%	0%
6+ months	17%	2%	7%	3%	15% [b]	1%

GS/OB is only destination visited on this trip	2019 Target travelers	2019 Non-target Day trip	2020 Target travelers	2020 Non-target Day trip	2021 Target travelers (a)	2021 Non-target Day trip (b)
	91%	83%	92%	85%	95%	87%

2019 target n=500, day trip n=125; 2020 target n=401, day trip n=100; 2021 target n=350, day trip n=149
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		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Family or friends	34%	40%	33%	20%	35%	34%
Gulf Shores & Orange Beach Tourism website	26%	6%	17%	12%	27% b	13%
Social media	19%	24%	18%	18%	21% b	10%
Travel blogs	8%	7%	2%	6%	5%	9%
Alabama's official tourism website	9%	4%	5%	9%	7%	9%
Traveler review sites or apps	26%	10%	16%	6%	18% b	8%
Travel/visitor guide	15%	4%	6%	8%	12%	7%
Travel advice websites or apps	15%	11%	13%	4%	15% b	7%
Booking websites or apps	22%	8%	13%	8%	20% b	7%
Hotel websites	20%	11%	14%	4%	17% b	5%
Vacation home rental booking sites/apps	41%	4%	46%	4%	33% b	5%
Local vacation rental company sites	20%	4%	11%	2%	17% b	5%
Magazine and newspaper articles	4%	4%	2%	0%	3%	4%

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

2019 target n=500, day trip n=125;
2020 target n=401, day trip n=100;
2021 target n=350, day trip n=149
a / b indicate statistically significant differences at the 95% level.

Comparing Target to Other Travelers

Children on trip	2019		2020		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	59%	45%	59%	32%	53%[b]	31%
Of trips with children: *2019 target n=295, day trip n=56; 2020 target n=204, day trip n=27; 2021 target n=168, day trip n=34*						
< 6 years old	43%	55%	44%	48%	37%	41%
6-11 years old	48%	52%	57%	37%	44%	76%[a]
12-17 years old	47%	38%	55%	78%	63%[b]	35%

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		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Automobile	89%	76%	99%	90%	94%	97%
Bus	1%	4%	0%	4%	0%	1%
Airplane	10%	6%	1%	5%	6%	2%
Other	1%	13%	0%	0%	1%	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=500, day trip n=125;
2020 target n=401, day trip n=100;
2021 target n=350, day trip n=149
a / b indicate statistically significant differences at the 95% level.

Comparing Target to Other Travelers

	2019		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Travel party size	4.4	3.5	4.9	3.1	4.3 b	2.4

Trip spending	2019		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Lodging	$1,272	$ -	$1,234	$ -	$1,541	$ -
Meals/food/groceries	$415	$98	$397	$103	$620 b	$72
Shopping	$275	$171	$207	$55	$225 b	$78
Recreation or entertainment	$203	$241	$167	$51	$158 b	$47
Transportation in Gulf Shores	$58	$76	$48	$32	$68 b	$24
Other	$58	$79	$44	$28	$67 b	$18
TOTAL	$2,280	$665	$2,097	$270	$2,679 b	$240
Per person spending	**$517**	**$190**	**$428**	**$87**	**$141**	**$99**

2019 target n=500, day trip n=125;
2020 target n=401, day trip n=100;
2021 target n=350, day trip n=149
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		2020		2021	
		Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Gender	Male	29%	35%	21%	28%	29%	35%
	Female	71%	65%	73%	64%	71%	66%
Age	Average	45	48	42	44	46	48
Marital status	Married	68%	61%	70%	64%	66%	54%
	Divorced/Separated	11%	7%	11%	12%	13%	13%
	Widowed	2%	7%	2%	4%	4%	4%
	Single/Never married	19%	25%	17%	20%	18%	28%
HH income	Average	$116,268	$101,881	$115,949	$101,600	$118,352	$102,138

2019 target n=500, day trip n=125; 2020 target n=401, day trip n=100; 2021 target n=350, day trip n=149
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		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Is easy to get to by car	92%	86%	92%	92%	95%	93%
Has warm weather	99%	88%	96%	94%	98%	93%
Has a “family-friendly” atmosphere	95%	86%	93%	96%	95%	90%
Offers a relaxing atmosphere	95%	93%	92%	94%	93%	86%
Is a safe destination	95%	90%	94%	86%	92%	86%
Has nice weather	96%	92%	94%	80%	92%	86%
Provides warm Southern hospitality	92%	88%	91%	86%	91%	86%
Has a variety of dining options at several price points	92%	81%	89%	86%	90%	86%
Has beautiful scenery	95%	85%	93%	96%	95%	84%
Has beautiful beaches	94%	83%	93%	90%	95%	84%
Has a clean, unspoiled environment	89%	86%	83%	78%	85%	76%
Offers a good vacation value for the money	88%	83%	87%	80%	84%	74%
Has a variety of lodging options at multiple price points	92%	83%	85%	80%	83%	72%
Offers plenty to see and do	90%	81%	88%	88%	91%	71%

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=500, day trip n=125;
2020 target n=401, day trip n=100;
2021 target n=350, day trip n=149

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

Comparing Target to Other Travelers

Overall experience	2019		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Top 2 Box Rating	**91%**	**85%**	**84%**	**83%**	**70%**	**84%**
5 (Excellent)	48%	46%	39%	34%	36%	41%
4 (Very good)	43%	39%	45%	48%	34%	44%
3 (Good)	7%	15%	14%	14%	30%	14%
2 (Fair)	1%	0%	2%	2%	1%	2%
1 (Poor)	0%	0%	0%	1%	0%	0%

Likelihood to recommend	2019		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Top 2 Box Rating	**95%**	**85%**	**92%**	**88%**	**93%**	**91%**
5 (Extremely likely)	69%	53%	67%	56%	66%	47%
4	26%	32%	25%	32%	27%	45%
3	4%	12%	7%	10%	6%	7%
2	0%	3%	1%	2%	1%	2%
1 (Not at all likely)	0%	0%	0%	0%	0%	0%

2019 target n=500, day trip n=125; 2020 target n=401, day trip n=100; 2021 target n=350, day trip n=149

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		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Likely to return (top 2 box)	**74%**	**69%**	**77%**	**76%**	**79%**	**84%**
5 (Already planning a trip)	26%	20%	24%	12%	25%	12%
4 (Very likely)	48%	48%	53%	64%	54%	72%
3 (Somewhat likely)	21%	24%	18%	18%	15%	12%
2 (Not very likely)	5%	7%	5%	4%	5%	3%
1 (Not at all likely)	0%	0%	0%	2%	1%	0%

During which season(s) would you be most likely to visit (of those likely to visit)	2019		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Spring	28%	44%	29%	40%	32%	54%
Summer	79%	69%	81%	77%	83%	63%
Fall	24%	36%	28%	57%	27%	50%
Winter	6%	22%	5%	19%	8%	14%

2019 target n=500, day trip n=125; 2020 target n=401, day trip n=100; 2021 target n=350, day trip n=149

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		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Florida	12%	32%	3%	12%	3%	38% [a]
Alabama	11%	12%	33%	51%	29%	33%
Georgia	8%	8%	6%	1%	22%	12%
Mississippi	4%	10%	13%	6%	7%	9%
Texas	13%	10%	8%	10%	15% [b]	3%
Tennessee	10%	3%	8%	1%	12%	3%
Louisiana	14%	17%	21%	15%	11% [b]	2%
Arkansas	2%	0%	4%	2%	1%	0%
Kentucky	2%	0%	2%	0%	0%	0%
Missouri	7%	2%	3%	2%	0%	0%
Illinois	8%	5%	0%	0%	0%	0%
Indiana	4%	0%	0%	0%	0%	0%
Michigan	4%	0%	0%	0%	0%	0%

2019 target n=500, day trip n=125; 2020 target n=401, day trip n=100; 2021 target n=350, day trip n=149

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

Comparing Non-Target Trips Year-Over-Year

General activities (non-target trips)	2019		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Beaches	81%	49%	80%	52%	71% b	32%
Dining out	67%	43%	66%	30%	58% b	26%
Relaxing	65%	25%	63%	32%	54% b	26%
Visiting friends/relatives who live in the area	12%	8%	8%	6%	9%	23% a
Shopping	54%	18%	43%	15%	48% b	17%
Swimming	58%	20%	64%	31%	52% b	16%
Sightseeing	37%	18%	21%	17%	23%	13%
Exercise/working out	15%	3%	16%	4%	10%	9%
Photography	12%	11%	7%	8%	13%	9%
Historical sites	13%	6%	4%	9%	6%	7%
Concerts and nightlife	9%	7%	4%	1%	7%	5%
Watching wildlife	16%	4%	10%	6%	13% b	5%
Birdwatching	9%	1%	3%	4%	4%	5%
Festivals or special events (non-sports events)	7%	4%	2%	2%	4%	5%
Hiking on trails	12%	4%	7%	12%	12% b	5%
Scuba diving/snorkeling	5%	2%	4%	3%	5%	4%
Boating or sailing	11%	10%	11%	5%	10% b	4%
Golfing	10%	2%	4%	2%	7%	4%
Shelling	19%	6%	15%	9%	18% b	4%
Fishing	14%	8%	14%	12%	18% b	3%
Visiting a spa	8%	4%	3%	3%	4%	3%
Kayaking/canoeing/paddle boarding	8%	2%	5%	6%	9% b	3%
Family/friends reunion	8%	4%	8%	3%	9% b	3%
Bicycle riding	7%	3%	4%	8%	9% b	2%
Sporting events	3%	3%	3%	1%	3%	2%
Dolphin tour	14%	9%	10%	6%	10% b	2%
Tennis	6%	1%	2%	2%	2%	1%
Parasailing/jet skiing	6%	1%	5%	2%	4%	1%

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

2019 target n=500, day trip n=125;
2020 target n=401, day trip n=100;
2021 target n=350, day trip n=149

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

Comparing Non-Target Trips Year-Over-Year

Specific attractions (non-target trips)	2019		2020		2021	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Adventure Island	15%	3%	3%	2%	9%	3%
Alabama Gulf Coast Zoo	13%	8%	6%	4%	6%	7%
Alabama's Coastal Connection Scenic Byway	14%	4%	8%	5%	12%	7%
Battleship USS Alabama	12%	6%	6%	4%	7%	7%
Bellingrath Gardens	3%	4%	2%	1%	2%	3%
Bon Secour National Wildlife Refuge	5%	4%	3%	1%	2%	5% [a]
Dauphin Island	13%	5%	8%	6%	2%	3%
Civil War History Trail					4%	2%
Coastal Birding Trail					11%	5%
Fort Morgan Historic Site	12%	4%	6%	6%	5%	3%
Gulf State Park	13%	4%	12%	10%	14%	9%
Hugh S. Branyon Backcountry Trail	3%	1%	1%	2%	3%	2%
National Naval Aviation Museum	8%	4%	2%	1%	4%	4%
OWA Park	4%	4%	4%	2%	7%	7%
Tanger Outlets	32%	16%	22%	12%	23% [b]	13%
The Track	12%	3%	8%	2%	7%	3%
The Wharf	28%	9%	16%	6%	19% [b]	10%
Waterville	7%	4%	3%	4%	4%	5%

b

2019 target n=500, day trip n=125; 2020 target n=401, day trip n=100; 2021 target n=350, day trip n=149
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.