Visitor Profile Research

Spring 2022

Strategic Marketing & Research Insights, LLC

Table of Contents

Introduction

- Background
- Research Objectives
- Methodology

Detailed Findings

- Travel Planning
- Trip Characteristics
- Travel Party Characteristics
- Views Toward Gulf Shores/ Orange Beach and Trip Satisfaction

Appendices

- Comparing Target Travelers to Other Travelers
- Comparing Non-Target Trips Year-Over-Year
- Questionnaire

Introduction

Visitor Profile Research – Spring 2022

Background

- Gulf Shores & Orange Beach Tourism (GSOBT) is responsible for marketing the Alabama Gulf Coast as a year-round destination, while stewarding a thoughtful, sustainable level of growth. In support of this mission, GSOBT has conducted quarterly visitor profile research for nearly 20 years. To attract and manage additional visitation to the area, it is critical to first have a thorough understanding of the current situation, and visitor profiling is a vital way to gain that understanding.

- GSOBT began partnering with Strategic Marketing & Research Insights (SMARInsights) to gather information from 2017 and 2018 visitors to better understand the visitor experience, existing image of the area, demography and geographic origins of visitors by season. This report is the first of four seasonal reports covering 2022.

- The COVID-19 pandemic brought with it global disruptions to travel. Due to COVID-19 and beach closures, the Visitor Profile Study was not conducted in Spring 2020.

- As of spring 2022, with COVID-19 vaccines widely available and case counts at manageable levels in most places, travel readiness has nearly returned to pre-pandemic levels. Now, however, many destinations face workforce shortages. Further complicating the travel landscape are very high gas prices, air travel delays and cancellations, and a rapidly changing economy.

- In addition to the typical objectives of the quarterly research (outlined on the following page), this wave of research continued to explore visitor familiarity with beach safety and sustainability initiatives.

- The data reported here is the result of surveying in markets indicated by Arrivalist and Key Data. The origin markets reflect a much higher share of visits from the upper Midwest (26% of the total, up from 11% in spring 2021). These visitors tend to stay longer and spend more; they are also more likely than other regions to use condos. More representation from these markets has impacts on the overall spring results.

Research Objectives

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 past springs

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 spring 2022 (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 82% condo/vacation rentals and 18% hotel stays.

- Surveys were conducted in the markets where mobile data indicated were home markets for devices that spent time in the Gulf Shores/Orange Beach area during the spring months. Both Arrivalist and Key Data were sources of information to identify spring visitor source markets.

Number of trips represented in the data	Spring 2022
Target trips (stayed 1-30 nights in paid accommodations)	400
Non-target trips (visited but did not stay overnight)	103

- Comparisons are made to Spring 2019 and 2021 data. Due to COVID-19 and beach closures, the Visitor Profile Study was not conducted in Spring 2020.
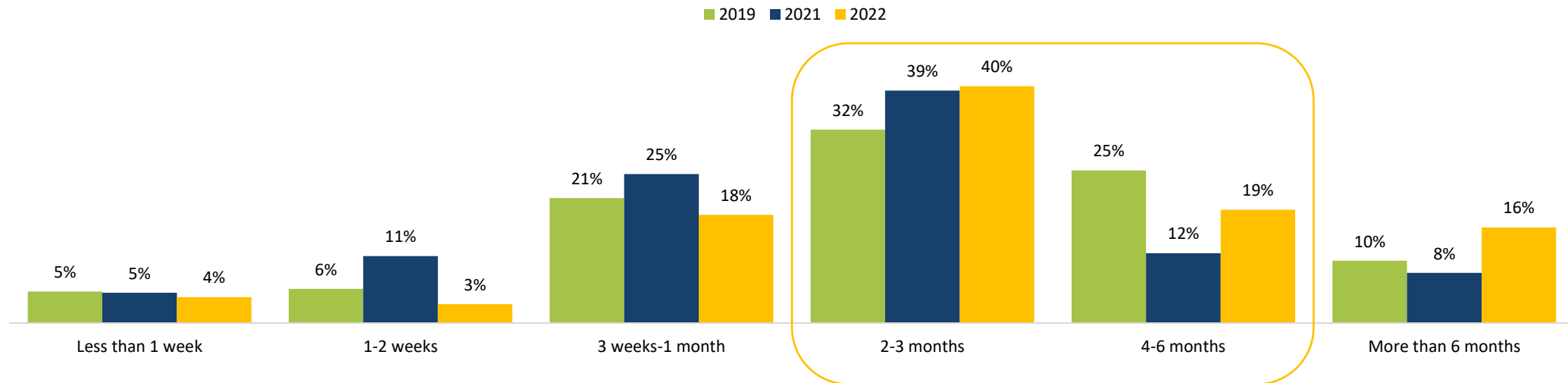
Detailed Findings

Visitor Profile Research – Spring 2022

Travel Planning

- The spring trip planning horizon appears to be returning to a more typical, pre-pandemic pattern, shifting back to a longer lead time.

- Over half of spring 2022 trips were planned 2-6 months in advance.

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

Legend: ■ 2019 ■ 2021 ■ 2022

	Less than 1 week	1-2 weeks	3 weeks-1 month	2-3 months	4-6 months	More than 6 months
2019	5%	6%	21%	32%	25%	10%
2021	5%	11%	25%	39%	12%	8%
2022	4%	3%	18%	40%	19%	16%

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

- Visitors in both lodging types are planning their GS/OB visit farther in advance. While still not as long as before the pandemic, planning horizons are moving in that direction.
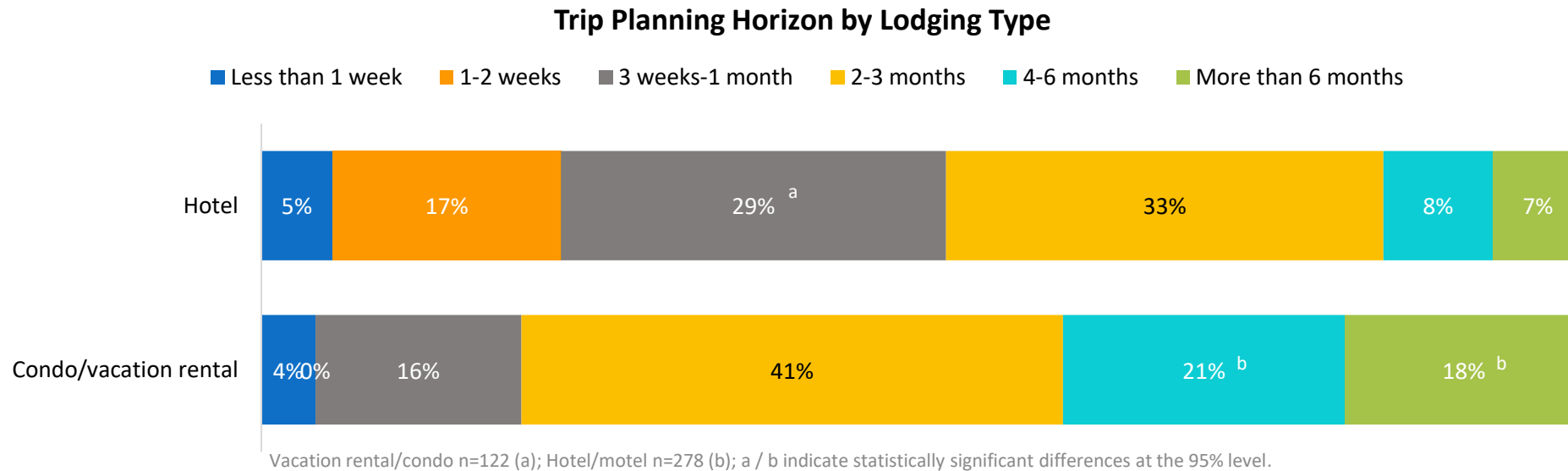
Trip Planning Horizon by Lodging Type

Legend: ■ Less than 1 week ■ 1-2 weeks ■ 3 weeks-1 month ■ 2-3 months ■ 4-6 months ■ More than 6 months

Hotel: 5% | 17% | 29% a | 33% | 8% | 7%

Condo/vacation rental: 4% 0% | 16% | 41% | 21% b | 18% b

Vacation rental/condo n=122 (a); Hotel/motel n=278 (b); a / b indicate statistically significant differences at the 95% level.
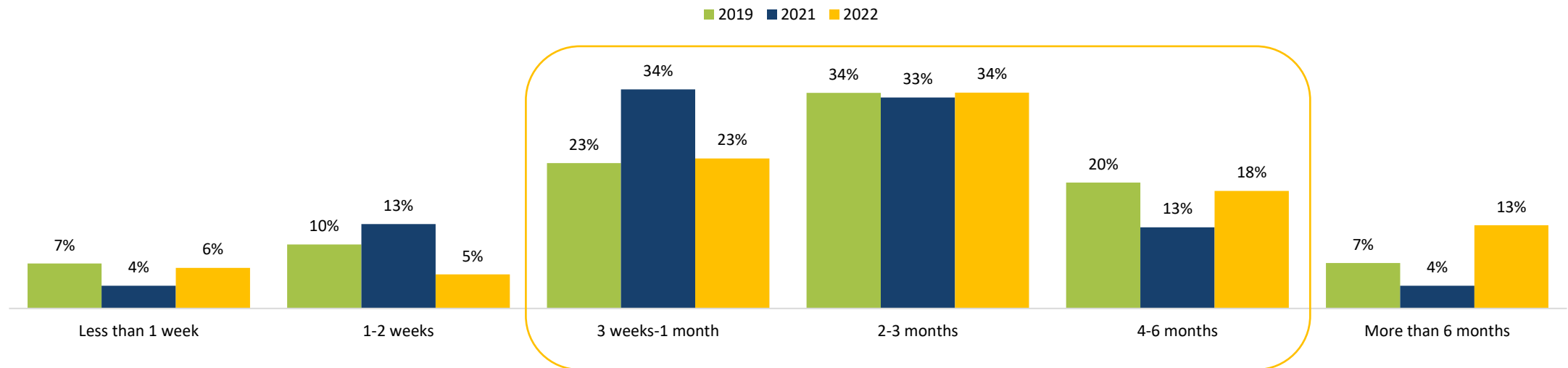
Question text: How far in advance did you begin planning your trip to Gulf Shores/Orange Beach? Response options as shown in graph above.

Travel Planning

- The booking window is also lengthening, although it is trailing planning.

- The distribution across booking time periods now looks very similar to spring 2019.

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

■ 2019 ■ 2021 ■ 2022

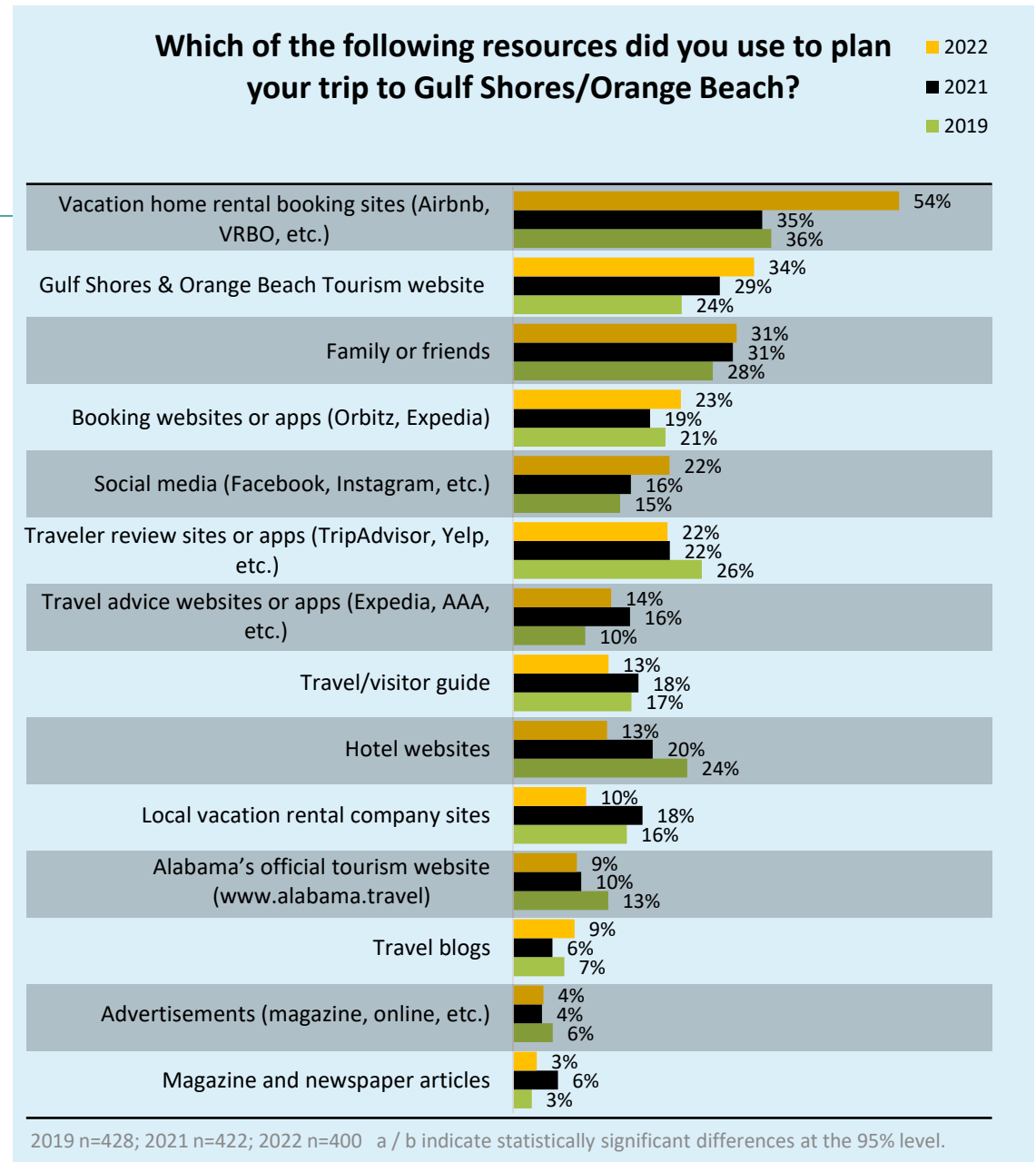|	Less than 1 week	1-2 weeks	3 weeks-1 month	2-3 months	4-6 months	More than 6 months
2019	7%	10%	23%	34%	20%	7%
2021	4%	13%	34%	33%	13%	4%
2022	6%	5%	23%	34%	18%	13%

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

10

Travel Planning

- This survey saw continued growth in usage of the GSOBT site.

- A jump in usage of vacation home rental booking sites is attributable to an uptick in visitors from the upper Midwest.

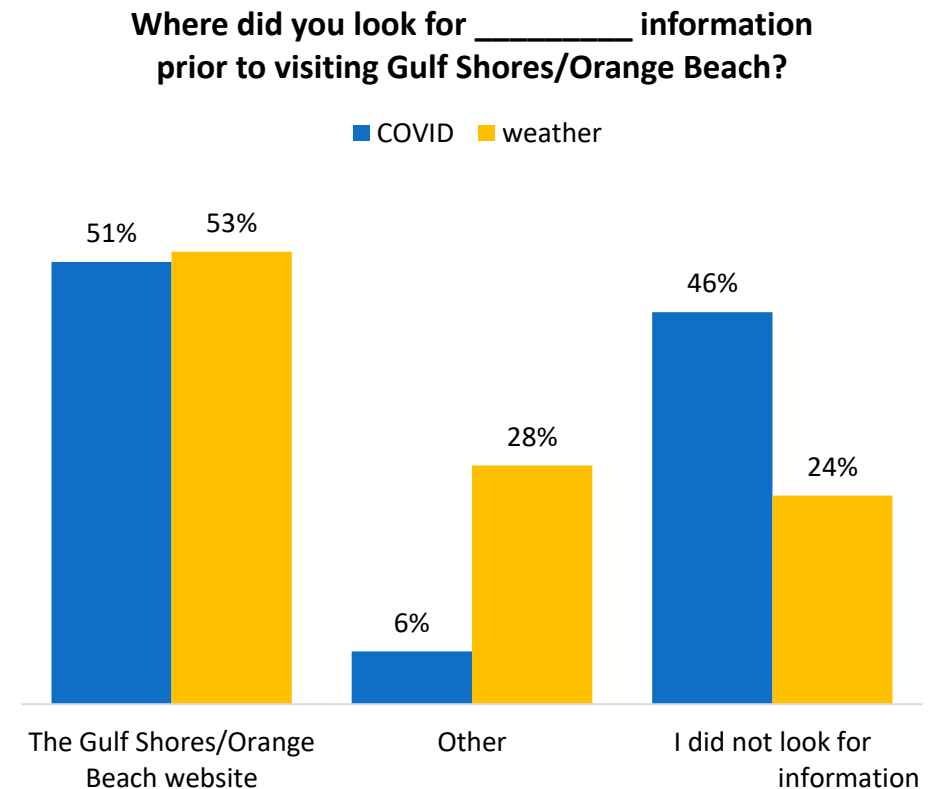- Reliance on visitor guides remains fairly steady, and most users access the guides both digitally and in print.

Visitor Guide format (2022)

- Both, 58%
- Digital guide downloaded from the website, 28%
- Printed guide, 13%

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

Legend: 2022, 2021, 2019

Resource	2022	2021	2019
Vacation home rental booking sites (Airbnb, VRBO, etc.)	54%	35%	36%
Gulf Shores & Orange Beach Tourism website	34%	29%	24%
Family or friends	31%	31%	28%
Booking websites or apps (Orbitz, Expedia)	23%	19%	21%
Social media (Facebook, Instagram, etc.)	22%	16%	15%
Traveler review sites or apps (TripAdvisor, Yelp, etc.)	22%	22%	26%
Travel advice websites or apps (Expedia, AAA, etc.)	14%	16%	10%
Travel/visitor guide	13%	18%	17%
Hotel websites	13%	20%	24%
Local vacation rental company sites	10%	18%	16%
Alabama's official tourism website (www.alabama.travel)	9%	10%	13%
Travel blogs	9%	6%	7%
Advertisements (magazine, online, etc.)	4%	4%	6%
Magazine and newspaper articles	3%	6%	3%

2019 n=428; 2021 n=422; 2022 n=400   a / b indicate statistically significant differences at the 95% level.

Travel Planning – GSOBT Website

- Last season (winter 2021-22), 70% of winter visitors used the GSOBT website to look for information on COVID-19 in the destination prior to visiting. Now, in Spring 2022, just half of visitors looked on the site for COVID info, and barely anyone looked elsewhere for COVID info. COVID is much less a concern now as travelers have largely learned to live with the idea of it.

- Weather is also a less pressing topic in spring than in winter, which is appropriate to the season. GSOBT's website remains the leading source of weather info for visitors – half looked on the CVB's website for weather information.

Where did you look for _____ information prior to visiting Gulf Shores/Orange Beach?

■ COVID ■ weather

|	COVID	weather
The Gulf Shores/Orange Beach website	51%	53%
Other	6%	28%
I did not look for _____ information	46%	24%

Travel Planning – Hotel vs. Condo Rental

- As expected, hotel users are more likely to use hotel websites, and condo stayers are more likely to use vacation home rental booking sites. Visitors from the upper Midwest are more likely than visitors from closer markets to use this travel planning resource.

- Hotel stayers are also much heavier users of the GS/OB Welcome Centers and more likely to use travel advice and booking websites, which is consistent with lower familiarity with the destination.

Trip planning resources with biggest difference by lodging type
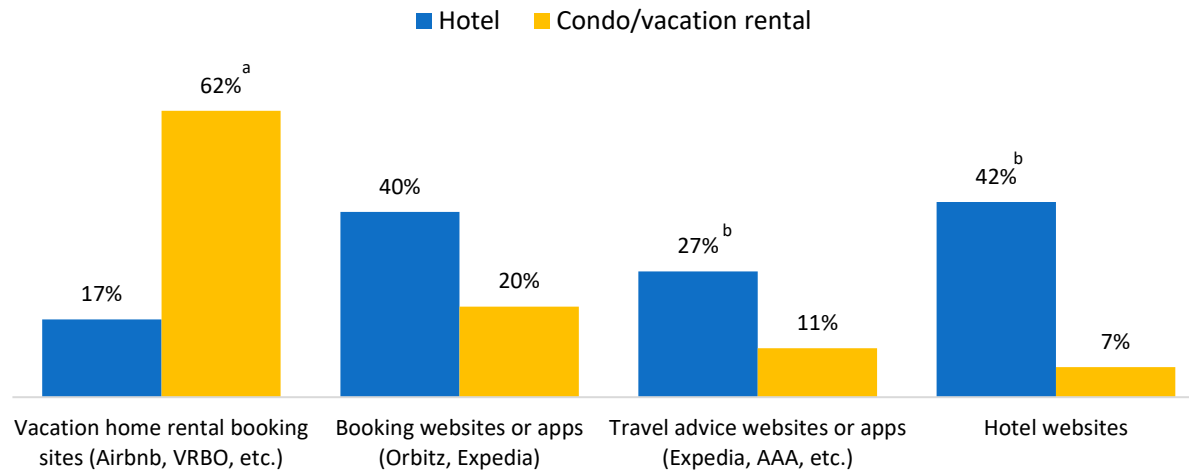
■ Hotel   ■ Condo/vacation rental

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.

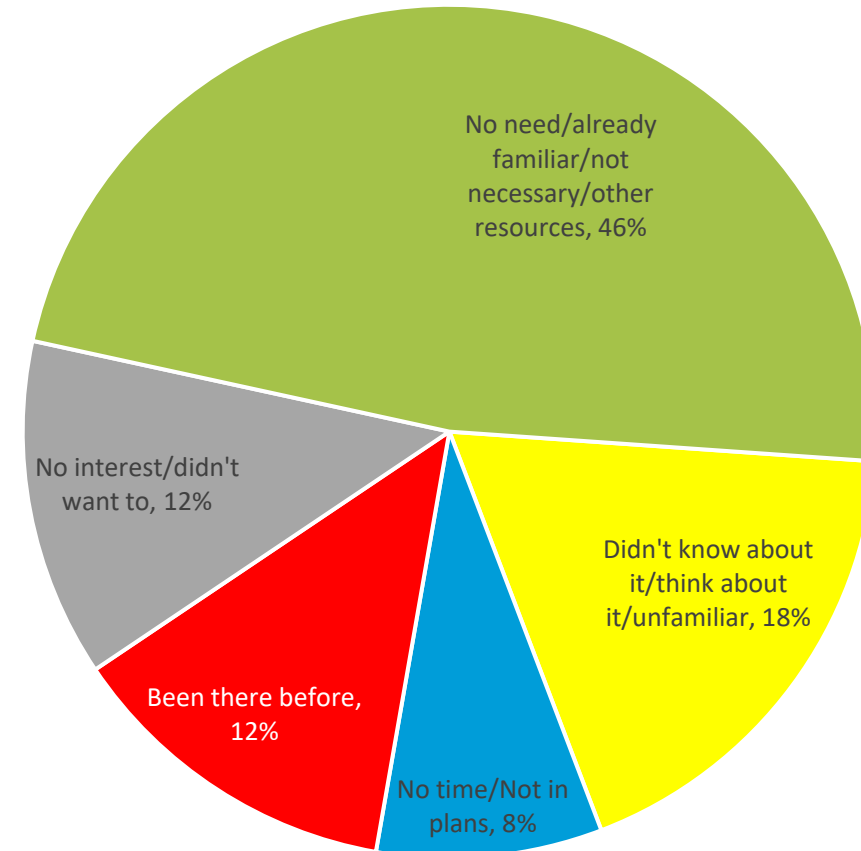**Visited the Gulf Shores/Orange Beach Welcome Center**
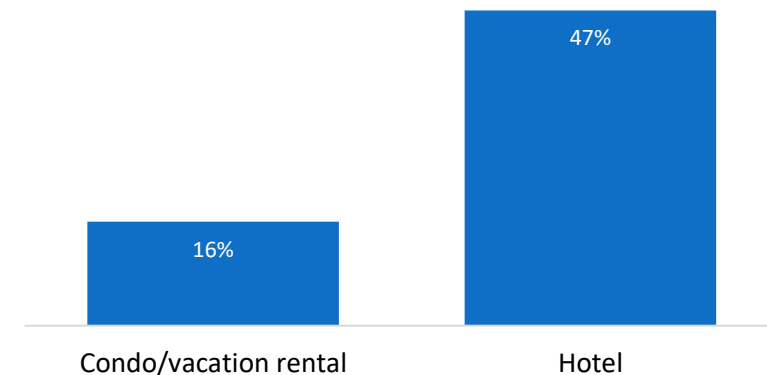
Vacation rental/condo n=122 (a); Hotel/motel n=278 (b); a / b indicate statistically significant differences at the 95% level.

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

13

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.

- Other reasons – lack of interest, prior visitation, didn't know about it or think about it – highlight an opportunity to educate visitors about the Welcome Centers and their benefits.

Why didn't you visit the welcome center?

Pie chart:
- No need/already familiar/not necessary/other resources, 46%
- Didn't know about it/think about it/unfamiliar, 18%
- No time/Not in plans, 8%
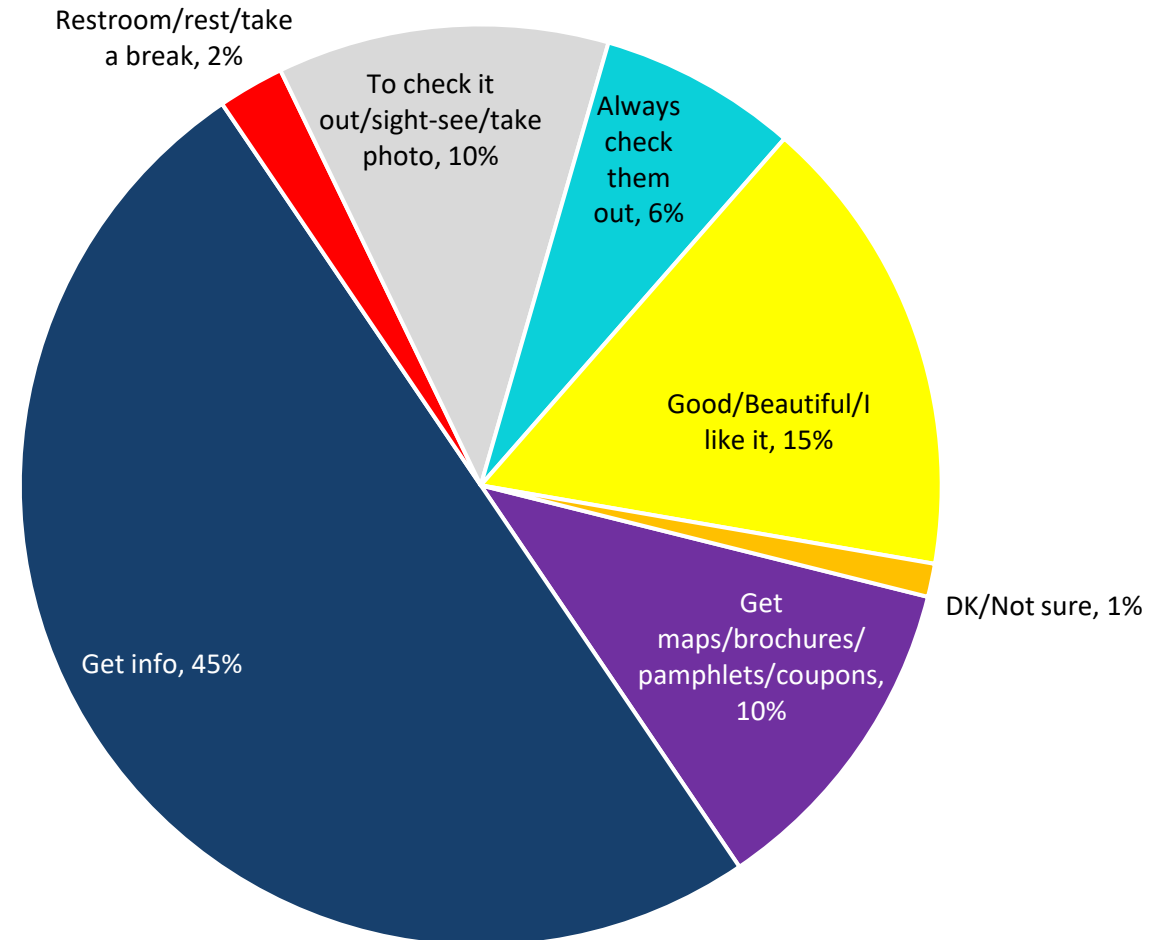- Been there before, 12%
- No interest/didn't want to, 12%

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, which is a typical result.

- The next most common reason is a more common response this spring than in past seasons: that the center itself is appealing and photo-worthy.

- Information gathering remains a common purpose for stopping at the Welcome Centers.

Why did you visit the welcome center?

Restroom/rest/take a break, 2%
To check it out/sight-see/take photo, 10%
Always check them out, 6%
Good/Beautiful/I like it, 15%
DK/Not sure, 1%
Get maps/brochures/pamphlets/coupons, 10%
Get info, 45%

Trip Characteristics

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

- Yes, I've been many times and know it will deliver the vacation I want: **43%**
- Yes, I've always wanted to go there: **25%**
- Yes, I go there every year: **23%**
- No, I was not familiar with Gulf Shores/Orange Beach prior to planning my recent trip: **17%**
- Yes, I have family and friends there: **15%**
- Yes, I was attending a planned event (tournament, meeting, wedding, etc.): **8%**
- Yes, Other: **4%**
- Yes, I used to live there: **2%**

First-time Visitors to Gulf Shores/Orange Beach

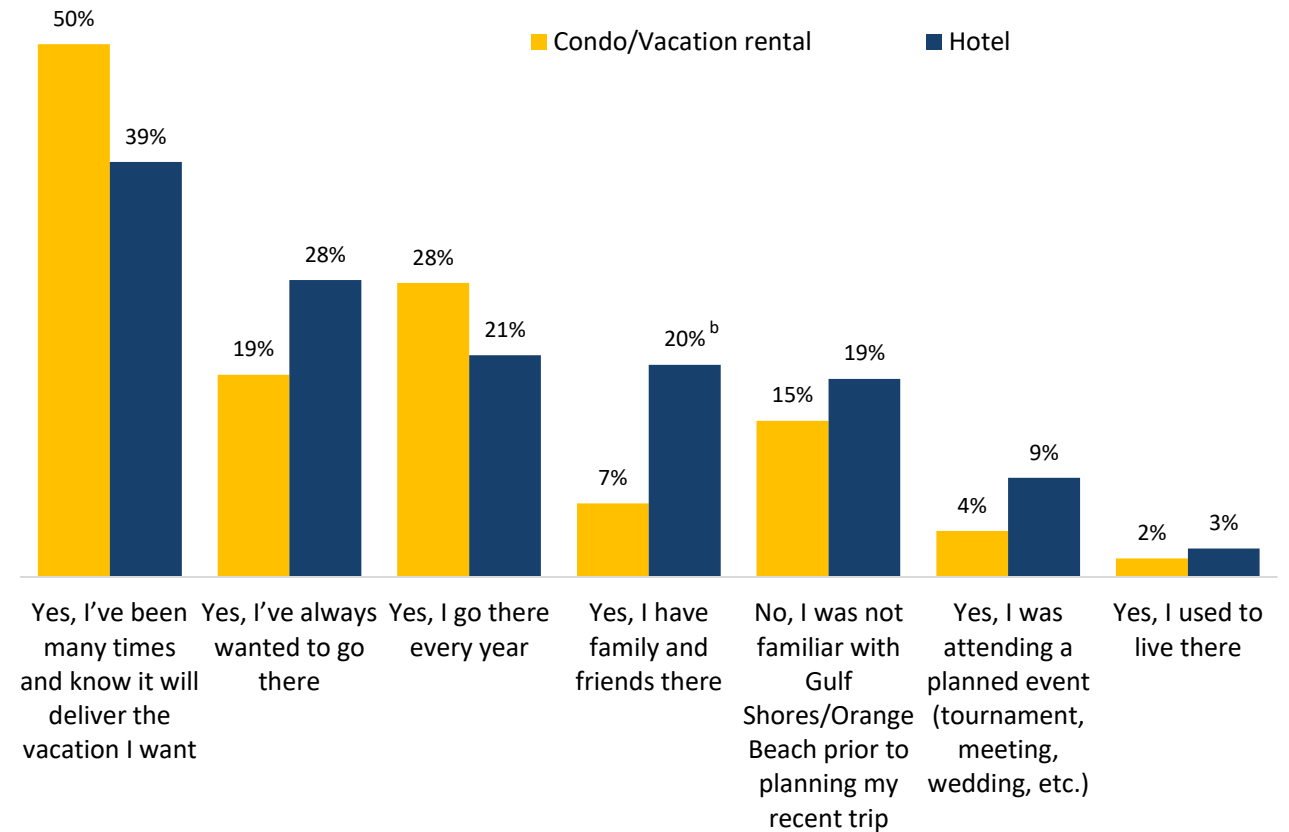| 2019	2021	2022
39%	33%	34%

- The bulk of GS/OB trips continue to be repeat visits from those who are familiar with the destination.

- Roughly a third of spring visitors are new to the destination, and this has remained fairly level despite the pandemic.
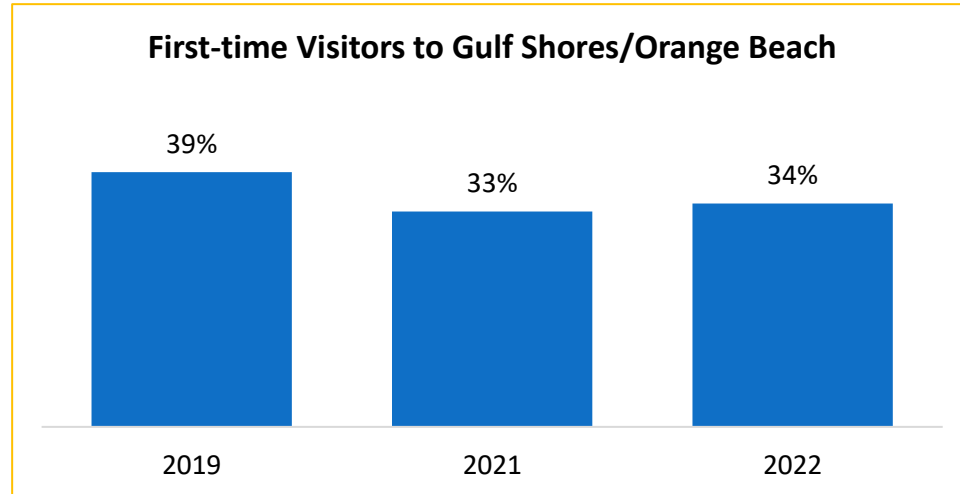
Question text: Prior to your visit, was Gulf Shores/Orange Beach familiar to you? Response options as shown in graph above.

16

In general, GS/OB's condo stayers are still repeat visitors. Hotel stayers are new to GS/OB and/or are visiting family/friends or attending an event.

Differences in Reasons for Familiarity

■ Condo/Vacation rental ■ Hotel

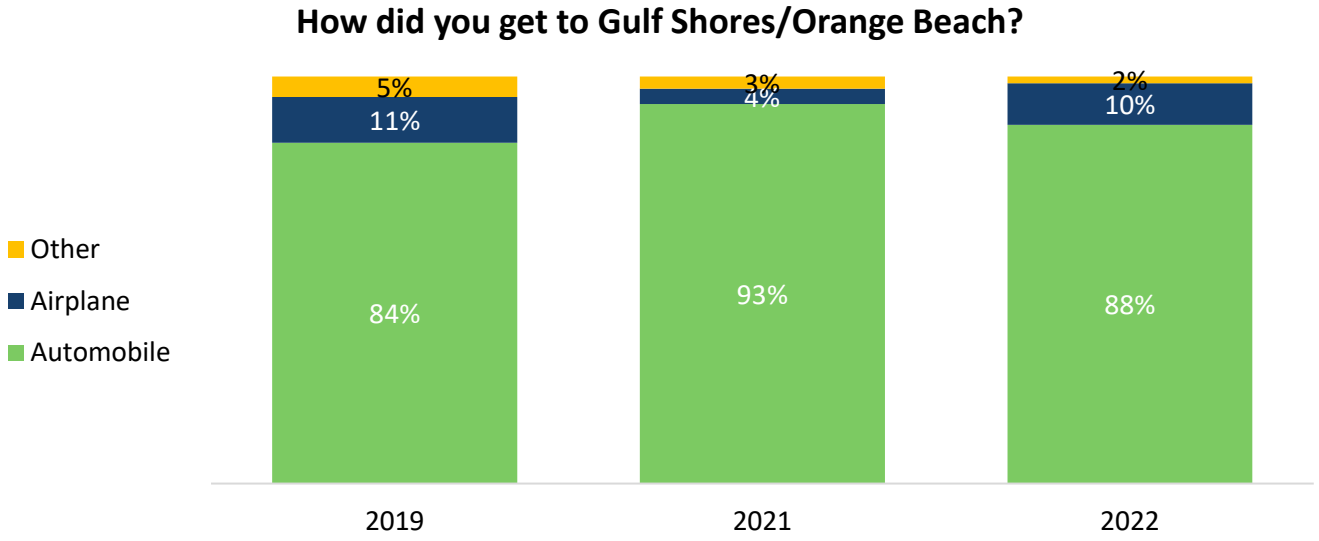| Category	Condo/Vacation rental	Hotel
Yes, I've been many times and know it will deliver the vacation I want	50%	39%
Yes, I've always wanted to go there	19%	28%
Yes, I go there every year	28%	21%
Yes, I have family and friends there	7%	20% [b]
No, I was not familiar with Gulf Shores/Orange Beach prior to planning my recent trip	15%	19%
Yes, I was attending a planned event (tournament, meeting, wedding, etc.)	4%	9%
Yes, I used to live there	2%	3%

Vacation rental/condo n=122 (a); Hotel/motel n=278 (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

- Like planning horizon, modes of transportation are returning to pre-pandemic levels. Car trips still dominate, but 10% of spring visits involve air travel.

How did you get to Gulf Shores/Orange Beach?

	2019	2021	2022
Other	5%	3%	2%
Airplane	11%	4%	10%
Automobile	84%	93%	88%

Legend:
- Other
- Airplane
- Automobile

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.

Trip Characteristics

- Most spring trips include the beach, and many also include the basic beach vacation activities of dining out, relaxing, shopping, and swimming.

- Activities that saw an uptick in participation this spring are Gulf State Park, dolphin tours, the Alabama Gulf Coast Zoo, and Dauphin Island.

Spring trip participation	2019	2021	2022
Beaches	75%	73%	80%
Dining out	68%	65%	72%
Relaxing	60%	61%	65%
Shopping	53%	45%	49%
Swimming	47%	48%	48%
Sightseeing	39%	36%	32%
Tanger Outlets	35%	23%	24%
The Wharf	21%	19%	20%
Gulf State Park	19%	14%	19%
Watching wildlife	11%	17%	18%
Dolphin tour	11%	7%	15%
Fort Morgan Historic Site	12%	12%	15%
Fishing	17%	14%	15%
Historical sites	12%	10%	15%
Shelling	17%	17%	14%
Alabama Gulf Coast Zoo	13%	7%	14%
Dauphin Island	12%	9%	13%
Hiking on trails	15%	13%	13%
Battleship USS Alabama	11%	10%	11%
Alabama's Coastal Connection Scenic Byway	9%	8%	10%
The Track	3%	5%	10%
Bicycle riding	8%	10%	10%
Exercise/Working out	12%	12%	9%
Photography	13%	12%	9%
Boating or sailing	10%	13%	8%
Adventure Island	7%	6%	8%
Birdwatching	4%	8%	7%
Civil War History Trail		5%	7%

Cont'd.	2019	2021	2022
Concerts and nightlife	11%	10%	7%
Visiting friends/relatives who live in the area	9%	9%	6%
Festivals or special events (non-sports events)	6%	6%	6%
Golfing	5%	6%	5%
Coastal Birding Trail			5%
OWA Park	3%	6%	5%
Family/friends reunion	7%	10%	5%
Bon Secour National Wildlife Refuge	5%	3%	4%
Parasailing/Jet skiing	6%	5%	4%
Kayaking/Canoeing/Paddle boarding	7%	8%	4%
Visiting a spa	6%	10%	4%
Bellingrath Gardens	3%	3%	3%
Sporting events	4%	4%	3%
Hugh S. Branyon Backcountry Trail	0%	3%	3%
Tropic Falls Indoor Waterpark at OWA			3%
Scuba diving/Snorkeling	6%	4%	3%
Tennis	2%	4%	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.

19

Trip Characteristics

- A majority of spring visitors went to a GS/OB beach. Beach usage remains significantly higher among condo stayers.

- Hotel stayer beach usage is in line with last spring. Lower beach visitation is consistent with shorter visits organized around events and/or visiting friends/family.
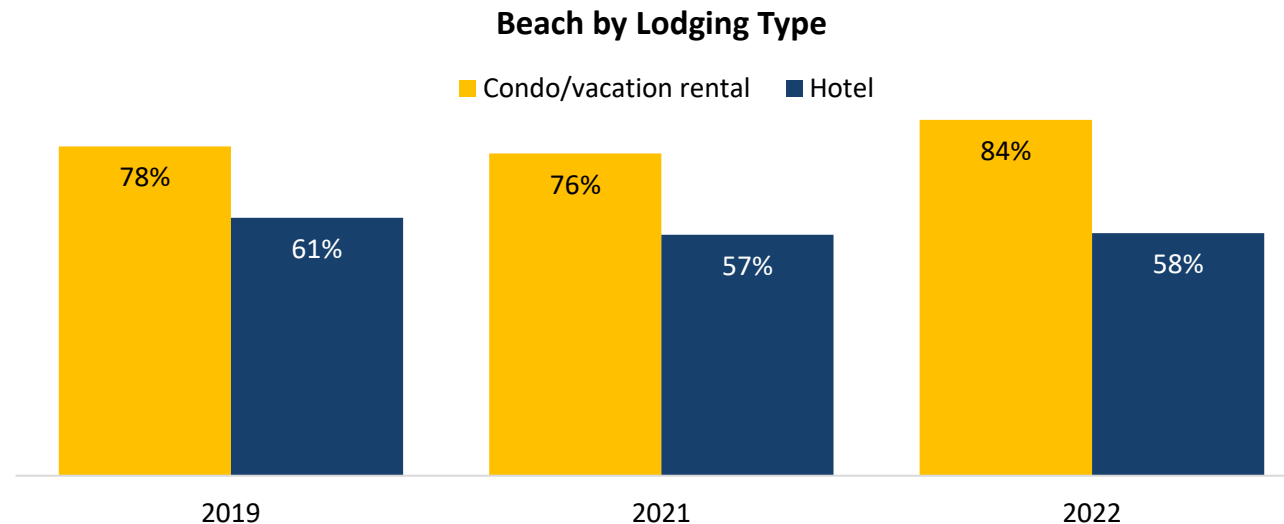
Beach by Lodging Type

■ Condo/vacation rental ■ Hotel

	2019	2021	2022
Condo/vacation rental	78%	76%	84%
Hotel	61%	57%	58%

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 2019 n=150; 2021 n=156; 2022 n=122
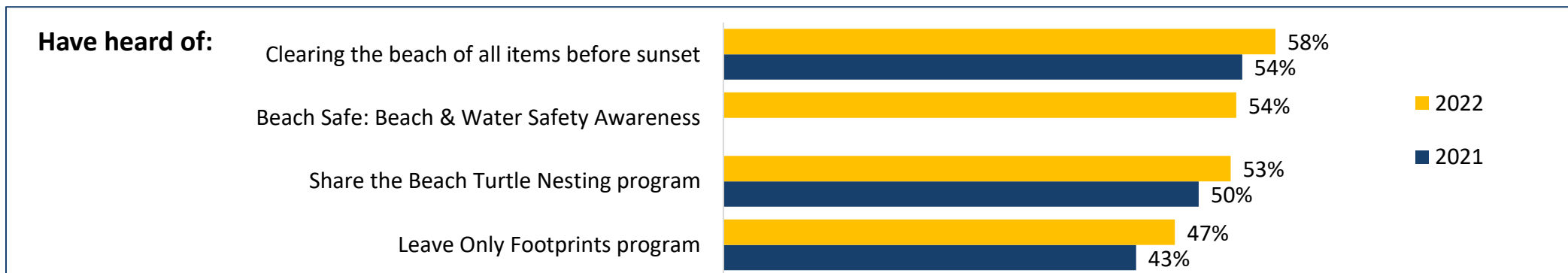Hotel/motel 2019 n=278; 2021 n=266; 2022 n=278
a / b indicate statistically significant differences at the 95% level.

Trip Characteristics

- The beach remains the main motivator of spring visits to GS/OB, followed by relaxing. Shopping rebounded as a motivator.

- Awareness of all of GSOBT's sustainability initiatives is higher now than it was a year ago. Just over half of spring visitors are aware of the Beach Safe program.

Top Spring trip motivators	2019	2021	2022
Beaches	66%	62%	67%
Relaxing	38%	42%	37%
Dining out	32%	23%	24%
Swimming	19%	17%	18%
Shopping	16%	9%	12%
Sightseeing	11%	12%	10%
Dolphin tour	6%	2%	8%
Fishing	8%	8%	7%
Dauphin Island	5%	5%	6%
The Wharf	4%	5%	6%

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.

Have heard of:

	2022	2021
Clearing the beach of all items before sunset	58%	54%
Beach Safe: Beach & Water Safety Awareness	54%	
Share the Beach Turtle Nesting program	53%	50%
Leave Only Footprints program	47%	43%

Trip Characteristics

- Overall spending increased showed a modest increase.

Average Travel Party Expenditures per Trip - SPRING	2019		2021		2022	
	Spending	% of total	Spending	% of total	Spending	% of total
Lodging	$842	52%	$1,007	52%	$1,017	52%
Meals/food/groceries	$340	21%	$382	20%	$394	20%
Shopping	$214	13%	$226	12%	$265	13%
Recreation or entertainment	$144	9%	$180	9%	$169	9%
Transportation within Gulf Shores	$45	3%	$67	3%	$80	4%
Other	$41	2%	$65	3%	$42	2%
Total	**$1,626**		**$1,926**		**$1,966**	

2019 n=428; 2021 n=422; 2022 n=400
a / b indicate statistically significant differences at the 95% level.

Average Travel Party Expenditures per Trip - SPRING	2019		2021		2022	
	Condo	Hotel	Condo	Hotel	Condo	Hotel
Lodging	$948	$420	$1,133	$485	$1,116[a]	$566
Meals/food/groceries	$368	$230	$407	$277	$418	$282
Shopping	$216	$208	$213	$278	$261	$284
Recreation or entertainment	$141	$154	$180	$180	$167	$182[b]
Transportation within Gulf Shores	$42	$58	$61	$90	$74	$110[b]
Other	$33	$69	$68	$51	$39	$56[b]
Total	**$1,748**	**$1,140**	**$2,061**	**$1,362**	**$2,076**	**$1,480**

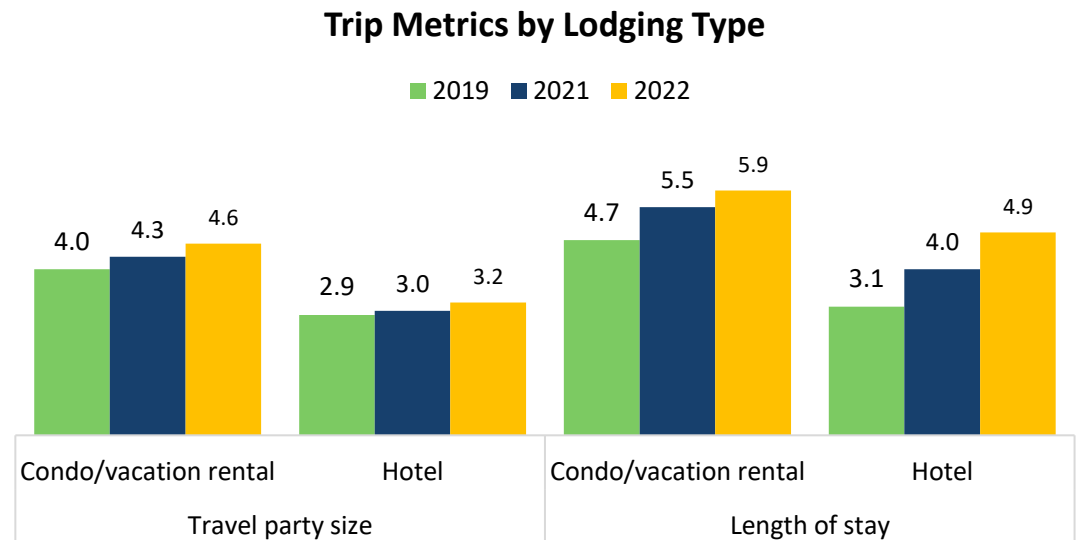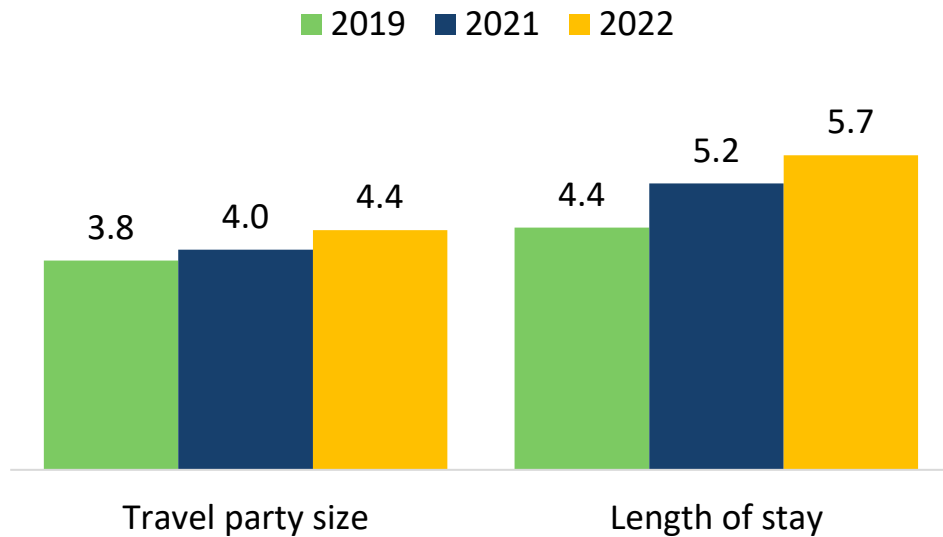Condo/vacation rental 2019 n=150; 2021 n=156; 2022 n=122
Hotel/motel 2019 n=278; 2021 n=266; n=278
a / b indicate statistically significant differences at the 95% level.

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 continued to increase among both lodging types.

- Length of stay also continued its upward climb; visits are longer for visitors in both lodging categories. Visitors from the upper Midwest typically stayed 33% longer than those from nearby markets; a higher share of these visitors helped drive up overall length of stay.

Trip Metrics by Lodging Type

Condo/vacation rental 2019 n=150; 2021 n=156; 2022 n=122
Hotel/motel 2019 n=278; 2021 n=266; 2022 n=278
a / b indicate statistically significant differences at the 95% level.

Trip Characteristics

- Trip length and party size increased – again, the result of a regional shift; visitors from the Upper Midwest brought larger parties to GS/OB and stayed longer. However, trip spending remained largely in line with prior Spring measures. Therefore unit spending – the average amount spent in GS/OB per person per night – declined.

Average Per-Person Per-Night Spending

2019	2021	2022
$97	$93	$79

2019 n=428; 2021 n=422; 2022 n=400
a / b indicate statistically significant differences at the 95% level.

Per-Person Per-Night Spending by Lodging Type

■ Vacation rental ■ Hotel

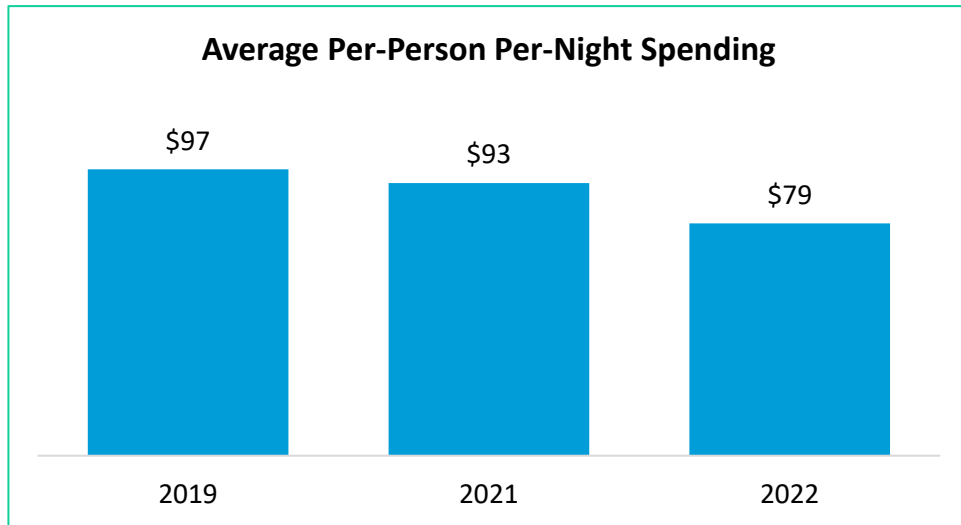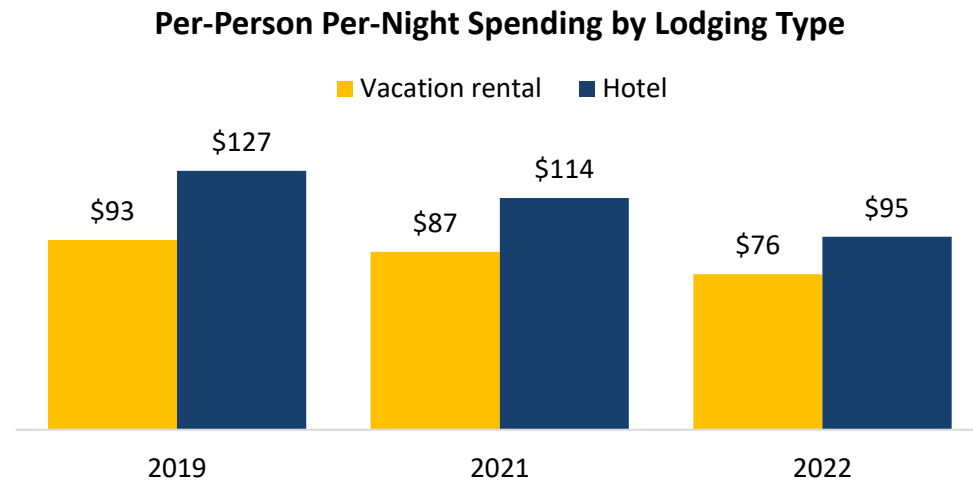|	2019	2021	2022
Vacation rental	$93	$87	$76
Hotel	$127	$114	$95

Condo/vacation rental 2019 n=150; 2021 n=156; 2022 n=122
Hotel/motel 2019 n=278; 2021 n=266; 2022 n=278
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.

Travel Party Characteristics

- Of travel parties that included children, the shares of elementary-aged and pre-school aged children remain in line with last spring.

- There was an increase this year in the share of travel parties that included teenagers.

Ages of Children (of travel parties with kids)

■ 2019 ■ 2021 ■ 2022

	Under 6 years old	6-11 years old	12-17 years old
2019	48%	40%	49%
2021	40%	57%	46%
2022	41%	58%	57%
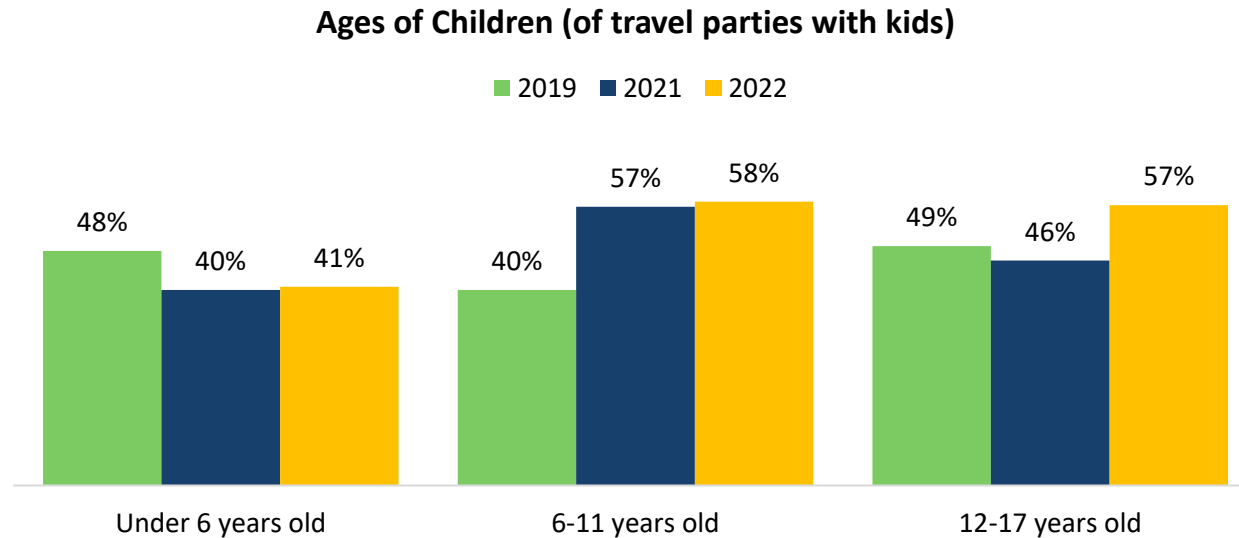
Question text: What ages were the children in your travel party? Response options as shown in graph above.

Travel Party Characteristics

- Spring visitor demographics are consistent with prior years in terms of age and marital status – most visitors are married.

- Household income was higher this spring than in prior spring seasons. This supports higher visit spending.

Year-over-Year Demographic Profile		2019	2021	2022
Age	Average	49	47	47
Marital status	Married	70%	67%	71%
	Divorced/ Separated	7%	11%	8%
	Single/ Never married	19%	18%	16%
	Widowed	4%	3%	4%
HH income	Average	$115,594	$128,531	$146,553

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

- Condo renters are older and have higher incomes, although both lodging types have higher incomes than last spring.

- Educational levels are higher among both groups this spring, with hotel stayers slightly more likely to be college educated.

- Hotel stayers are more likely to be executives or in IT. Condo stayers are more likely to be retired or in skilled trade/service.

- Hotel visitors continue to be a more ethnically diverse group than condo stayers.

Spring demographic profile by lodging type		2019 Vacation rental/condo	2019 Hotel	2021 Vacation rental/condo	2021 Hotel	2022 Vacation rental/condo	2022 Hotel
Age	Average	49	47	48	47	50	45
Marital status	Married	75%	67%	74%	64%	74%	70%
	Divorced/Separated	10%	4%	11%	12%	13%[a]	6%
	Single/Never married	11%	26%	3%	3%	3%	4%[b]
	Widowed	4%	3%	12%	22%	9%	19%
HH income	Average	$118,387	$104,274	$141,421	$121,835	$150,806	$144,369
Education	College grad+	64%	61%	63%	61%	67%	69%
Occupation	Executive/upper mgmt.	15%	15%	14%	19%	9%	22%[b]
	IT professional	5%	10%	6%	10%	7%	17%[b]
	Educator	13%	11%	7%	5%	10%	6%
	Healthcare					12%[a]	11%
	Homemaker	14%	10%	10%	7%	2%	1%
	Student	1%	1%	1%	0%	6%	4%
	Small business owner	4%	4%	5%	6%	4%	8%
	Skilled trade/service	7%	10%	15%	9%	16%	8%
	Other	17%	14%	21%	26%	10%	7%
	Retired	24%	17%	20%	11%	20%	12%
	Not currently employed	1%	6%	2%	7%	5%	5%
Ethnicity	Caucasian/White	92%	77%	92%	87%	91%	85%
	African-American/Black	5%	15%	6%	6%	5%	11%
	Latino/Hispanic	2%	4%	2%	5%	3%	4%
	Asian	2%	6%	2%	4%	2%	0%
	American Indian	0%	0%	0%	1%	0%	0%
	Other	1%	0%	0%	0%	2%	1%

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 2022 visitors. The upper Midwest represents a larger share of spring visitors.
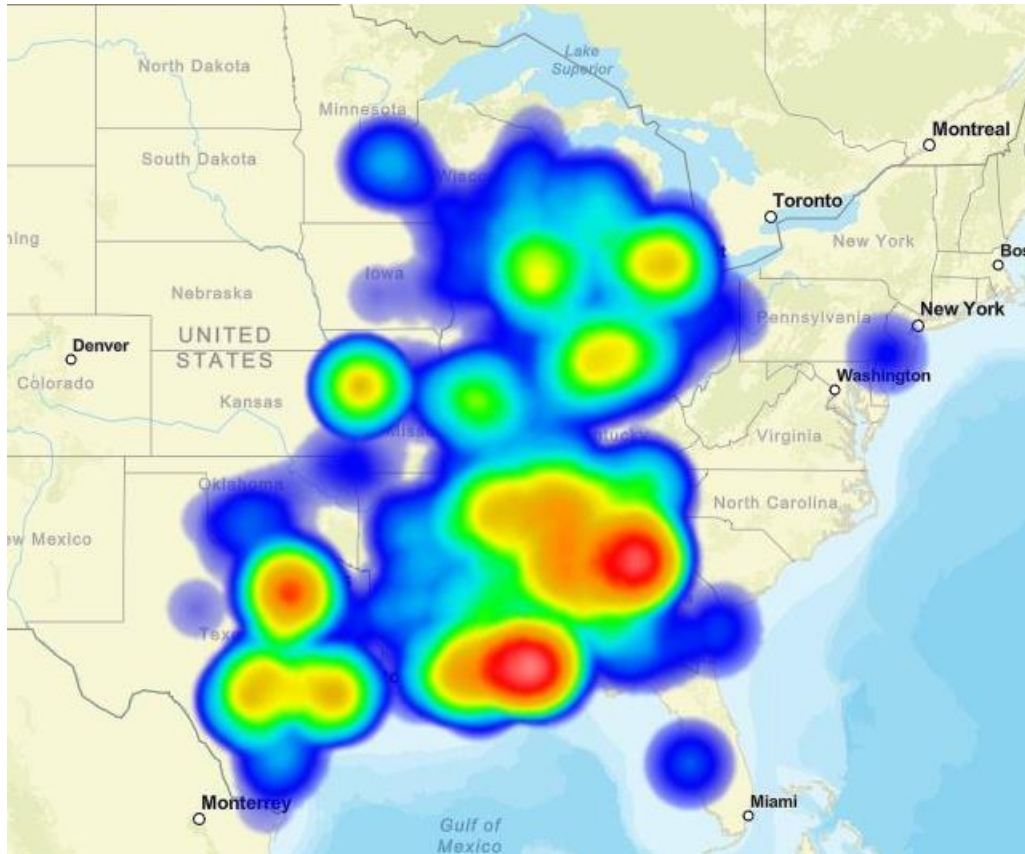
Top States of Origin	2019	2021	2022
Alabama	25%	28%	24%
Mississippi	9%	12%	14%
Louisiana	12%	14%	10%
Michigan	2%	2%	9%
Georgia	5%	8%	8%
Texas	6%	5%	6%
Indiana	2%	2%	6%
Minnesota	0%	0%	6%
Ohio	1%	1%	4%
Wisconsin	1%	1%	3%
Oklahoma	0%	0%	3%
Tennessee	5%	6%	2%
Illinois	2%	2%	2%
Missouri	2%	3%	2%
Arkansas	3%	3%	2%
Iowa	0%	1%	2%

Views Toward GS/OB & Trip Satisfaction

- GS/OB visitors continue to give it highly favorable ratings. The destination's relaxing atmosphere and beaches are its top-rated image attributes this spring.

- Ratings for being easy to get to by car declined, potentially the result of higher gas prices and more distant origin markets. A dip in agreement that GS/OB offers a good vacation value for the money would support this.

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 Gulf Shores/Orange Beach

■ Top 2 Box ■ 3 ■ Bottom 2 Box

Attribute	Top 2 Box	3	Bottom 2 Box	Last year top 2 box
Offers a relaxing atmosphere	96%	4%	0%	94%
Has beautiful beaches	95%	5%	0%	95%
Has warm weather	94%	5%	1%	96%
Has a variety of dining options at several price points	94%	5%	0%	92%
Offers plenty to see and do	94%	5%	1%	91%
Has beautiful scenery	94%	6%	0%	93%
Is a safe destination	93%	6%	1%	95%
Has nice weather	93%	6%	0%	93%
Has a "family-friendly" atmosphere	93%	6%	1%	93%
Has a variety of lodging options at multiple price points	90%	8%	2%	90%
Provides warm Southern hospitality	90%	8%	1%	93%
Has a clean, unspoiled environment	88%	10%	2%	87%
Is easy to get to by car	87%	10%	3%	95%
Offers a good vacation value for the money	87%	13%	1%	89%

29

Views Toward GS/OB & Trip Satisfaction

- Likelihood to recommend GS/OB remains very high.

- Hotel stayers are especially likely to recommend the destination, which is notable because these visitors tend to be newcomers to GS/OB.

Likelihood to Recommend GS/OB
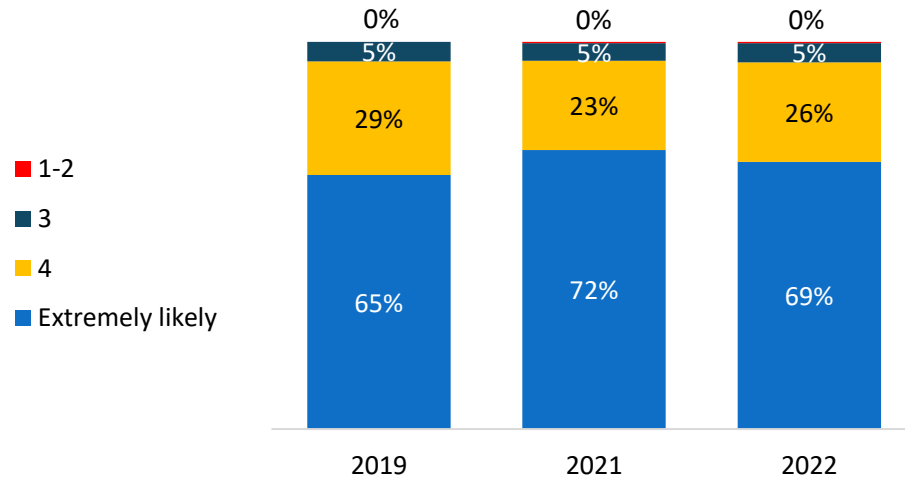
	2019	2021	2022
1-2			
3	5%	5%	5%
4	29%	23%	26%
Extremely likely	65%	72%	69%
(top labels)	0%	0%	0%

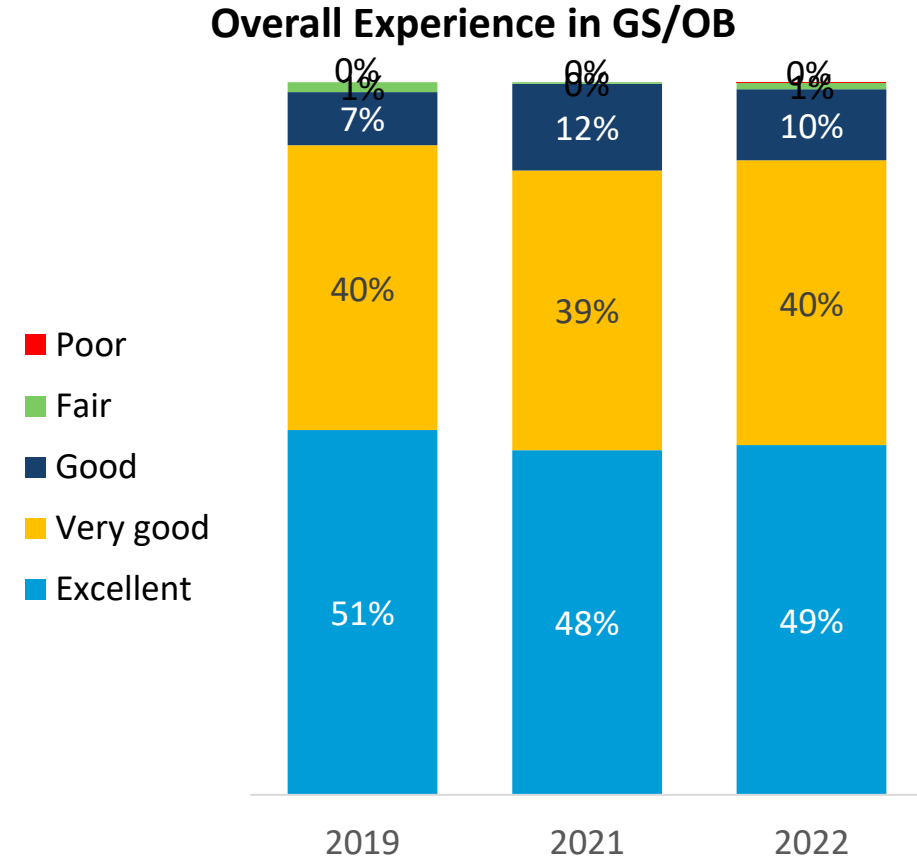| How likely are you to recommend Gulf Shores/Orange Beach to your friends or family as a destination to visit for a leisure trip?		2019	2021	2022
Vacation rental/condo	**Top 2 Box**	**94%**	**96%**	**93%**
	5 – extremely likely	68%	77%	68%
	4	26%	19%	25%
Hotel	**Top 2 Box**	**96%**	**95%**	**96%**
	5 – extremely likely	66%	70%	70%
	4	31%	25%	26%

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 trip experience is in line with last spring.

Overall Experience in GS/OB

Legend:
- Poor
- Fair
- Good
- Very good
- Excellent

2019
- 0%
- 1%
- 7% (Good)
- 40% (Very good)
- 51% (Excellent)

2021
- 0%
- 0%
- 12% (Good)
- 39% (Very good)
- 48% (Excellent)

2022
- 0%
- 1%
- 10% (Good)
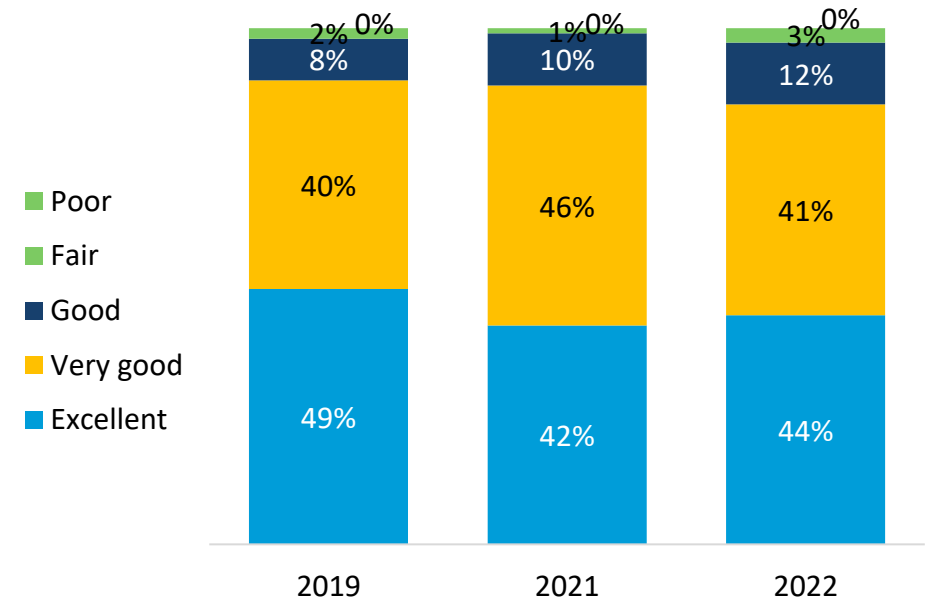- 40% (Very good)
- 49% (Excellent)

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

- 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:
  - "People were nice but it didn't seem like a lot of unique experiences"
  - "People were courteous, but not friendly"
  - "It was not excellent; people were trying to do their best but short of staff and lower quality then usual"
  - "I felt they did what they should but did not go out of their way"

- Of those who rated it fair, comments include:
  - "Every place at the Gulf is in desperate need of hired help, just like everywhere else in the country."
  - "The VRBO rental was a nightmare. Nothing in the house worked."

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

Legend:
- Poor
- Fair
- Good
- Very good
- Excellent

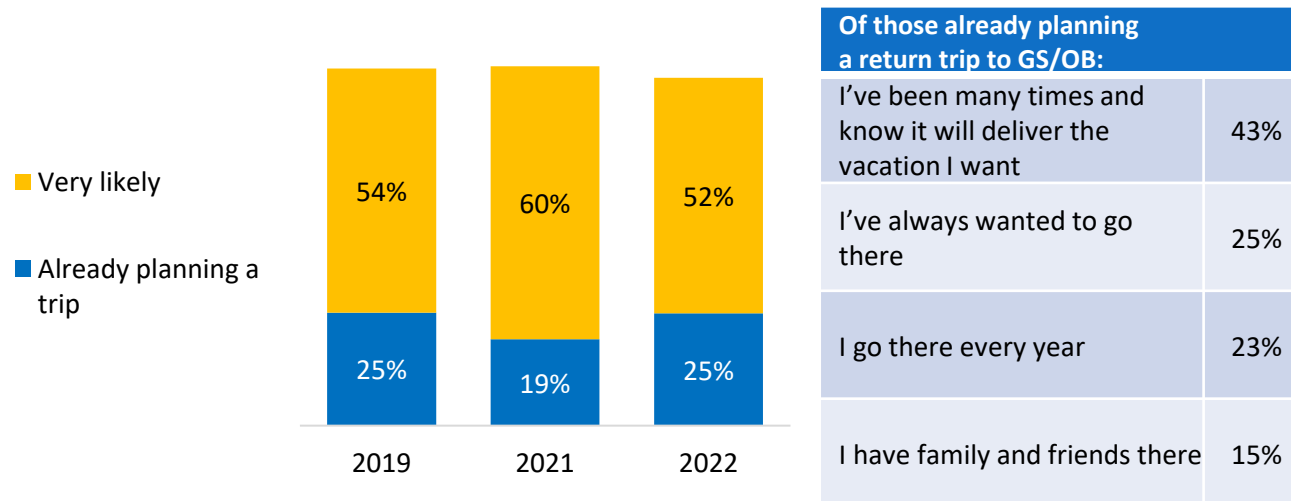|	2019	2021	2022
Fair	2%	1%	3%
Poor	0%	0%	0%
Good	8%	10%	12%
Very good	40%	46%	41%
Excellent	49%	42%	44%

2019 n=428; 2021 n=422; 2022 n=400

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
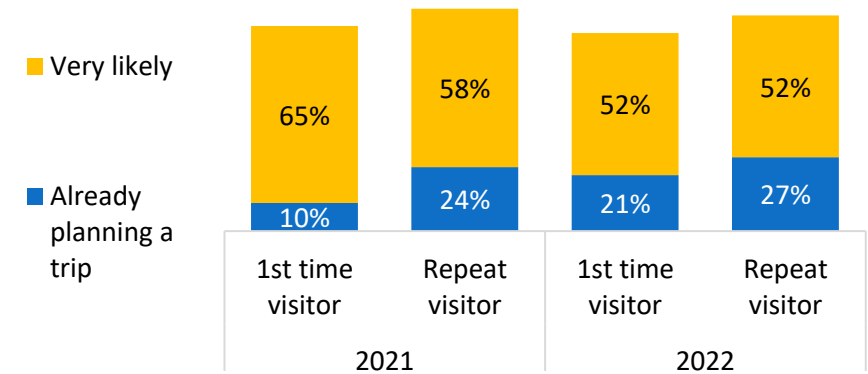
Views Toward GS/OB & Trip Satisfaction

- Likelihood to return remains high, with a quarter of those who are already planning their next trip saying they had always wanted to visit.

- Consistent with positive experiences among first-time visitors, twice as many are already planning a trip this year compared with last.

Likely to Return to GS/OB in the Next Year

- Very likely
- Already planning a trip

	2019	2021	2022
Very likely	54%	60%	52%
Already planning a trip	25%	19%	25%

Of those already planning a return trip to GS/OB:	
I've been many times and know it will deliver the vacation I want	43%
I've always wanted to go there	25%
I go there every year	23%
I have family and friends there	15%

Likelihood to Visit GS/OB in the Next Year

- Very likely
- Already planning a trip

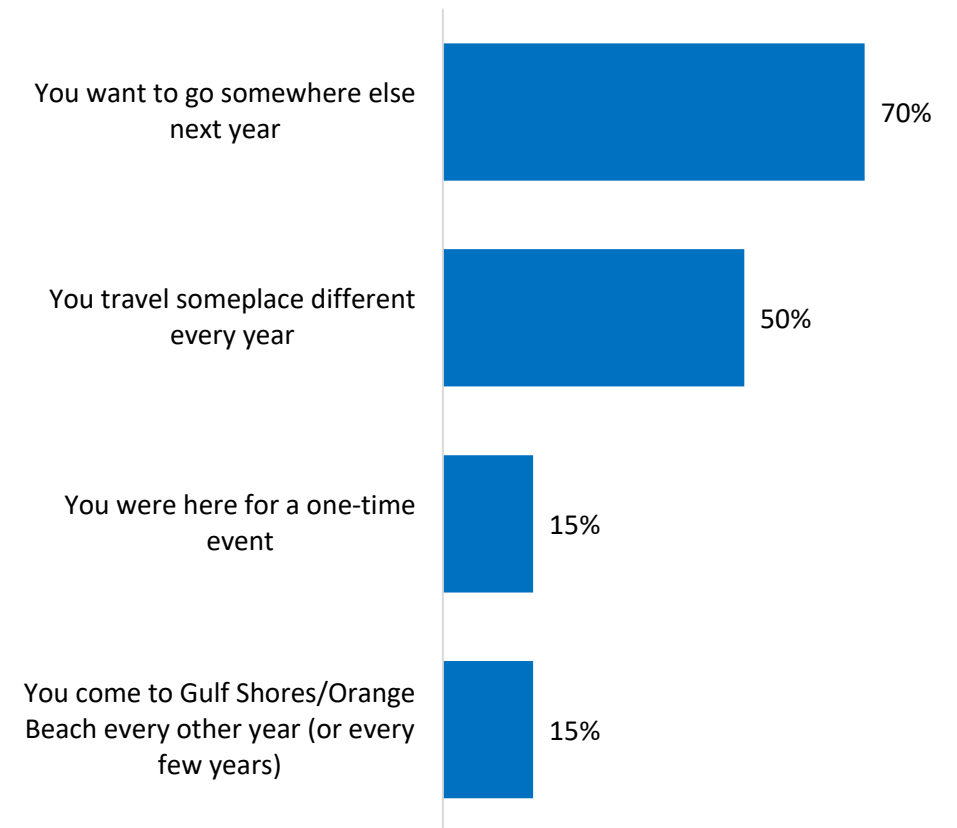|	2021		2022	
	1st time visitor	Repeat visitor	1st time visitor	Repeat visitor
Very likely	65%	58%	52%	52%
Already planning a trip	10%	24%	21%	27%

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

- Among the very few (24) spring visitors unlikely to return next year, seven in 10 want to go somewhere else, and half are in the habit of visiting a different location each year.

- For most, it is about seeing other places, rather than not wanting to return to GS/OB – although cost is a factor. Comments from those who won't return in 2023 include:
    - "We are trying a different beach but will go to gulf shores another time"
    - "TOOOOOOOOOO EXPENSIVE"
    - "It was way too busy"
    - "I will vacation closer to home due to high gas prices."
    - "I will not visit in the next calendar year, but very likely I will visit again within the next 2-3 years. I have other places that I would like to visit in the coming year; in particular St. Augustine, Florida."
    - "I travel to many places every year and rarely return to a spot that soon."

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

Reason	%
You want to go somewhere else next year	70%
You travel someplace different every year	50%
You were here for a one-time event	15%
You come to Gulf Shores/Orange Beach every other year (or every few years)	15%

Destinations Visited

- GS/OB overnight trips continue to be single-destination trips for the most part, regardless of lodging type or transportation. Of those who stayed in a vacation rental, more than 8 in 10 visited only GS/OB. Likewise, of those who stayed in a hotel, more than 80% visited only GS/OB.

- We see a similar result when we look at spring visits by transportation type. Of those who arrived by car, 85% visited only GS/OB on their trip. Of those who arrived by plane, 85% did not visit anywhere other than GS/OB (these visitors do not consider flying through another city to be visiting that other city).

- Other destinations visited by the few who took side trips or had multiple stops along the way include Biloxi and Pensacola.
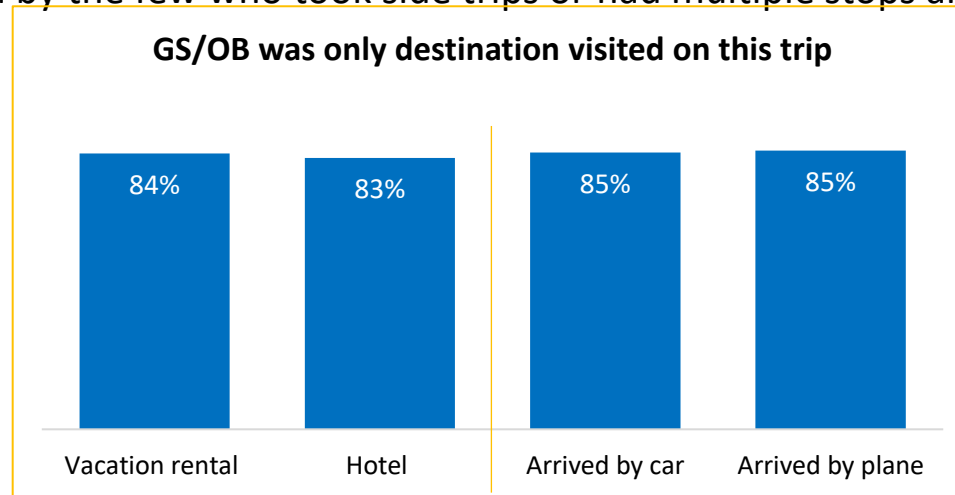
GS/OB was only destination visited on this trip

Vacation rental	Hotel	Arrived by car	Arrived by plane
84%	83%	85%	85%

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.

Welcome Center Supplemental Analysis

Visitor Profile Research – Spring 2022

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

Welcome Center Impact

- 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 longer stays among those who visited a Welcome Center, it is more likely that people who stay in the area longer are also those who explore the Welcome Center.

- Welcome Centers do point visitors toward more activities, since that is one of their functions. And the data indicate that the Welcome Centers helped insulate GS/OB from the general decline in activity participation at the height of the pandemic.

- First-time GS/OB visitors are more likely to visit a Welcome Center.

Spring visits	No Welcome Center			Visited Welcome Center		
	2019	2021	2022	2019	2021	2022
Length of stay	3.5	4.2	4.7	3.6	4.8	5.5
# of activities on trip	5.3	4.9	5.8	9.1	8.7	7.9

Visited Welcome Center

Repeat visitor	1st time
30%	39%
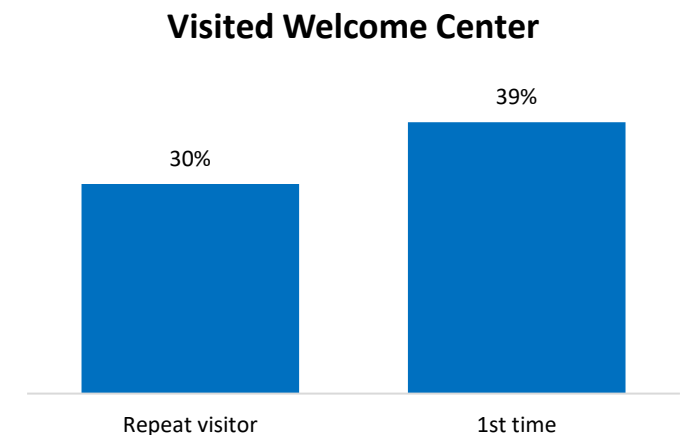
Impact on Spending

- Welcome Center visitors spent 12% more in the destination.

- Welcome Center visitation is higher than non-Center visitors for shopping, recreation and entertainment, and transportation within the destination.

- The Welcome Centers are having a positive impact on visitor behavior.

Trip spending	No Welcome Center			Visited Welcome Center		
	2019	2021	2022	2019	2021	2022
Lodging	$690	$782	$825	$672	$549	$712
Meals/food/groceries	$282	$266	$336	$334	$291	$303
Shopping	$135	$170	$210	$345	$359	$355
Recreation or entertainment	$113	$103	$131	$174	$280	$224
Transportation within Gulf Shores	$35	$40	$62	$100	$144	$121
Other	$27	$30	$30	$81	$107	$63
Total	$1,282	$1,391	$1,594	$1,706	$1,730	$1,778

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

- Spring Welcome Center visitors agree more strongly the GS/OB has a clean, unspoiled environment, offers plenty to see and do, and has beautiful beaches. The latter is already quite high even among those who don't go to the Welcome Centers, so a further increase is an especially positive result.

"Describes extremely well"

■ No Welcome Center ■ Visited Welcome Center

	No Welcome Center	Visited Welcome Center
Has a clean, unspoiled environment	50%	52%
Offers plenty to see and do	59%	65%
Has beautiful beaches	70%	72%
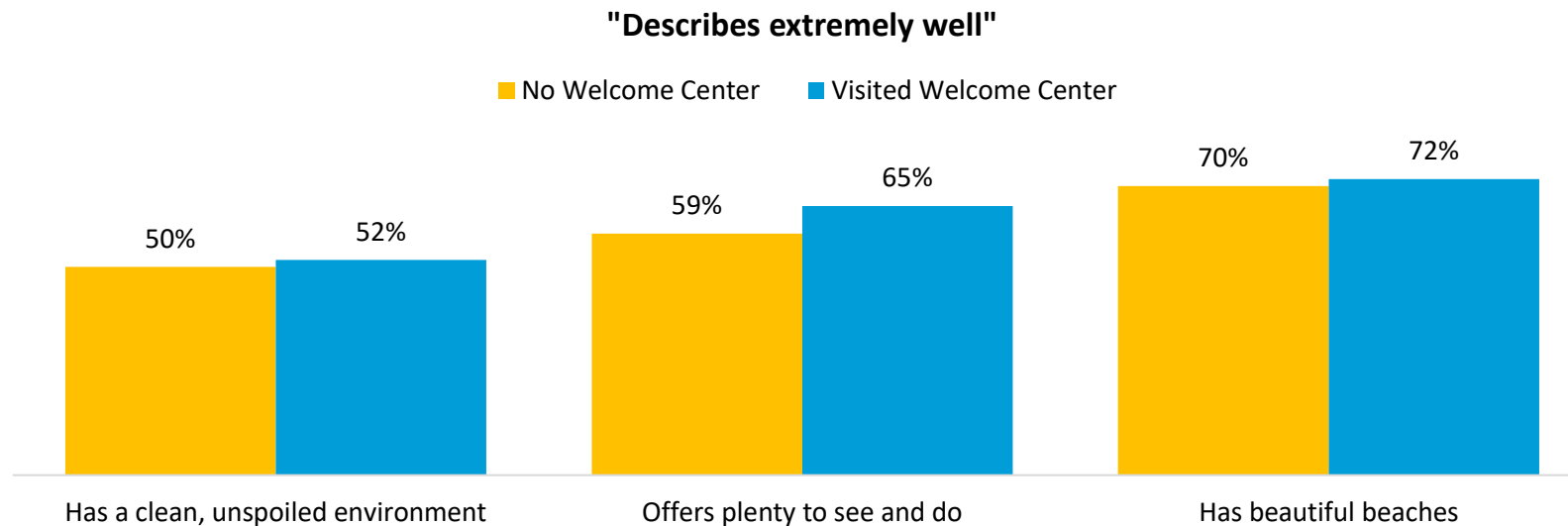
Impact on Experience and Intent to Return

- Exceptionally high "excellent" ratings among non-Center visitors sets a high bar for the Welcome Centers to beat. Particularly since those who don't visit the Centers tend to be regular visitors who know the destination well.

- This shift compared to last spring could also be a function of a return to the more standard GS/OB visitor – versus 2020 and 2021 when the destination hosted people who were less familiar to the area and less familiar with leisure travel in general.

Overall experience in GS/OB

	Very good	Excellent
No Welcome Center (2021)	43%	43%
Visited Welcome Center (2021)	49%	42%
No Welcome Center (2022)	39%	51%
Visited Welcome Center (2022)	41%	41%

How likely are you to visit Gulf Shores/Orange Beach in the next year?

Legend:
- Not at all likely
- Not very likely
- Somewhat likely
- Very likely
- Already planning a trip

	2021 No Welcome Center	2021 Visited Welcome Center	2022 No Welcome Center	2022 Visited Welcome Center
Not at all likely	0%	0%	1%	2%
Not very likely	3%	0%	5%	7%
Somewhat likely	20%	10%	17%	20%
Very likely	57%	74%	51%	57%
Already planning a trip	20%	16%	26%	15%

40

Appendices

Visitor Profile Research – Spring 2022

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 and 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	2019	2021	2022
Average # visits/year	1.8	2.2	2.0
First-time trips	37%	33%	22%

2019 day trips n=160; 2021 day trips n=113; 2022 day trips n=103

Comparing Target to Other Travelers

Began planning trip	2019		2021		2022	
	Target travelers	**Non-target Day trip**	**Target travelers**	**Non-target Day trip**	**Target travelers (a)**	**Non-target Day trip (b)**
< 1 week before trip	5%	49%	5%	65%	4%	34%[a]
1-2 weeks	6%	20%	11%	16%	3%	35%[b]
3 weeks - 1 month	21%	11%	25%	13%	18%	23%
2 - 3 months	32%	5%	39%	3%	40%[a]	4%
4-6 months	25%	5%	12%	2%	19%[a]	3%
6+ months	11%	9%	8%	1%	16%[a]	1%

GS/OB is only destination visited on this trip	2019		2021		2021	
	Target travelers	**Non-target Day trip**	**Target travelers**	**Non-target Day trip**	**Target travelers (a)**	**Non-target Day trip (b)**
	90%	75%	88%	87%	84%[a]	63%

2019 day trips n=160; 2021 day trips n=113; 2022 day trips n=103
a / b indicate statistically significant differences at the 95% level.

Question text: How far in advance did you begin planning your trip to Gulf Shores/Orange Beach? Response options as shown in table.
Question text: Was Gulf Shores/Orange Beach the only destination you visited on this trip? YES/NO

Comparing Target to Other Travelers

Resources used to plan GS/OB trip	2019		2021		2022	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Traveler review sites or apps	26%	6%	22%	9%	22%	25%
Gulf Shores & Orange Beach Tourism website	24%	8%	29%	15%	34% [a]	24%
Travel/visitor guide	17%	5%	18%	11%	13%	22% [b]
Family or friends	28%	31%	31%	33%	31% [a]	17%
Social media	15%	8%	16%	16%	22%	17%
Travel advice websites or apps	10%	10%	16%	4%	14%	17%
Vacation home rental booking sites/apps	36%	5%	35%	5%	54% [a]	13%
Booking websites or apps	21%	11%	19%	5%	23%	13%
Magazine and newspaper articles	3%	7%	6%	6%	3%	11%
Hotel websites	24%	11%	20%	7%	13%	11%
Travel blogs	7%	11%	6%	6%	9%	9%
Alabama's official tourism website	13%	4%	10%	7%	9%	8%
Local vacation rental company sites	16%	4%	18%	4%	10% [a]	3%

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 day trips n=160; 2021 day trips n=113; 2022 day trips n=103
a / b indicate statistically significant differences at the 95% level.

Comparing Target to Other Travelers

Children on trip	2019		2021		2022	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
% of trips with children	42%	34%	48%	30%	49%[a]	26%
Of trips with children: *2019 target n=177, day trip n=33; 2021 target n=182, day trip n=27; 2022 target n=187, day trip n=20*						
< 6 years old	48%	33%	40%	30%	41%	20%
6-11 years old	40%	64%	57%	37%	58%	80%
12-17 years old	49%	36%	46%	56%	57%	55%

Question text: Who traveled with you on this trip? Select all that apply. Response options: Spouse/Partner, Adult friends/relatives, Children under 18 [shown], Sports team, Business associates, Other, specify.
Question text: [IF CHILDREN UNDER 18 SELECTED] What ages were the children in your travel party? Response options as shown in table.

Mode of travel to GS/OB	2019		2021		2022	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Automobile	84%	85%	93%	96%	88%	89%
Airplane	11%	14%	4%	4%	10%	8%
Other	5%	1%	3%	1%	2%	3%

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 day trips n=160; 2021 day trips n=113; 2022 day trips n=103
a / b indicate statistically significant differences at the 95% level.

Comparing Target to Other Travelers

	2019		2021		2022	
	Target travelers	**Non-target Day trip**	**Target travelers**	**Non-target Day trip**	**Target travelers (a)**	**Non-target Day trip (b)**
Travel Party Size	3.8	2.7	4.0	2.6	4.4	2.4

Trip spending	2019		2021		2022	
	Target travelers	**Non-target Day trip**	**Target travelers**	**Non-target Day trip**	**Target travelers (a)**	**Non-target Day trip (b)**
Lodging	$842	$0	$1,007	$0	$1,017	$0
Meals/food/groceries	$340	$134	$382	$90	$394[a]	$95
Shopping	$214	$105	$226	$89	$265	$121
Recreation or entertainment	$144	$76	$180	$37	$169	$54
Transportation within Gulf Shores	$45	$78	$67	$23	$80	$41
Other	$41	$44	$65	$24	$42	$11
TOTAL	$1,626	$436	$1,926	$263	$1,966	$322
Per person spending	**$432**	**$160**	**$479**	**$103**	**$451**	**$135**

2019 day trips n=160; 2021 day trips n=113; 2022 day trips n=103
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		2019		2021		2022	
		Target travelers	Non-target travelers	Target travelers	Non-target travelers	Target travelers (a)	Non-target travelers (b)
Age	Average	49	54	47	49	47	52 [b]
Marital status	Married	70%	75%	67%	59%	71%	73%
	Single	26%	18%	18%	26%	16%	16%
	Other	4%	7%	14%	15%	4%	6%
HH income	Average	$115,594	$96,292	$128,531	$101,459	$146,553	$132,137

2019 day trips n=160; 2021 day trips n=113; 2022 day trips n=103
a / b indicate statistically significant differences at the 95% level.

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

Comparing Target to Other Travelers

Top 2 Box	2019		2021		2022	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Offers a relaxing atmosphere	95%	89%	94%	93%	96%	96%
Is easy to get to by car	90%	87%	95%	90%	87%	88%
Has beautiful beaches	95%	94%	95%	97%	95%	94%
Has a "family-friendly" atmosphere	93%	90%	93%	85%	93%	92%
Is a safe destination	93%	92%	95%	87%	93%	82%
Has a clean, unspoiled environment	85%	93%	87%	87%	88%	86%
Offers plenty to see and do	91%	83%	91%	80%	94%	92%
Has nice weather	93%	90%	93%	97%	93%	94%
Provides warm Southern hospitality	92%	88%	93%	85%	90%	94%
Has a variety of dining options at several price points	91%	88%	92%	80%	94%	82%
Has a variety of lodging options at multiple price points	90%	81%	90%	72%	90%[a]	69%
Has beautiful scenery	94%	95%	93%	90%	94%	96%
Has warm weather	93%	93%	96%	97%	94%	96%
Offers a good vacation value for the money	89%	81%	89%	80%	87%	78%

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 day trips n=160; 2021 day trips n=113; 2022 day trips n=103
a / b indicate statistically significant differences at the 95% level.

Comparing Target to Other Travelers

Overall Experience	2019		2021		2022	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Top 2 Box Rating	**91%**	**83%**	**88%**	**80%**	**89%**	**86%**
5 (Excellent)	51%	46%	48%	43%	49%	50%
4 (Very good)	40%	37%	39%	36%	40%	36%
3 (Good)	7%	15%	12%	20%	10%	12%
2 (Fair)	1%	1%	0%	0%	1%	1%
1 (Poor)	0%	1%	0%	0%	0%	1%

Likelihood to Recommend	2019		2021		2022	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Top 2 Box Rating	**95%**	**87%**	**95%**	**90%**	**95%**	**94%**
5 (Extremely likely)	65%	58%	72%	66%	69%	65%
4	29%	29%	23%	25%	26%	29%
3	5%	12%	5%	7%	5%	4%
2	0%	0%	0%a	2%	0%	2%
1 (Not at all likely)	0%	1%	0%	2%	0%	0%

2019 day trips n=160; 2021 day trips n=113; 2022 day trips n=103
a / b indicate statistically significant differences at the 95% level.

Question text: Thinking about your overall experience in Gulf Shores/Orange Beach during your trip, would you say it was…? Response options: Poor, Fair, Good, Very good, Excellent

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

Comparing Target to Other Travelers

Likelihood to Visit Again in the Next Year	2019		2021		2022	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Likely to Return (top 2 box)	**79%**	**73%**	**79%**	**84%**	**77%**	**75%**
5 (Already planning a trip)	25%	28%	19%	18%	25%	25%
4 (Very likely)	54%	46%	60%	66%	52%	49%
3 (Somewhat likely)	16%	16%	18%	11%	17%	20%
2 (Not very likely)	4%	7%	2%	3%	5%	4%
1 (Not at all likely)	1%	4%	0%	2%	1%	2%

During which season(s) would you be most likely to visit (of those likely to visit)	2019		2021		2022	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Spring	59%	54%	50%	48%	57%	63%
Summer	52%	47%	62%	66%	59%	48%
Fall	29%	37%	38%	38%	35%	58%[b]
Winter	9%	14%	10%	17%	11%	19%

2019 day trips n=160; 2021 day trips n=113; 2022 day trips n=103
a / b indicate statistically significant differences at the 95% level.

Question text: How likely are you to visit Gulf Shores/Orange Beach in the next year? Response options: Not at all likely, Not very likely, Somewhat likely, Very likely, Already planning a trip
Question text: [IF SOMEWHAT LIKELY OR ABOVE] During which season(s) would you be most likely to visit? Select all that apply. Response options: Spring, Summer, Fall, Winter

Comparing Target to Other Travelers

Top States of Origin	2019		2021		2022	
	Target travelers	**Non-target Day trip**	**Target travelers**	**Non-target Day trip**	**Target travelers (a)**	**Non-target Day trip (b)**
Alabama	17%	10%	20%	28%	19%	41%[b]
Georgia	7%	5%	12%	7%	18%	10%
Mississippi	5%	5%	6%	8%	10%	15%
Texas	12%	16%	10%	10%	5%	0%
Indiana	3%	3%	5%	2%	2%	0%
Louisiana	9%e	4%	8%	4%	14%	8%
Illinois	3%	3%	7%	11%	11%	2%
Missouri	2%	3%	6%	1%	3%	1%
Michigan	3%	3%	5%	4%	2%	0%
Wisconsin	6%	2%	3%	2%	1%	0%
Tennessee	4%	5%	7%	2%	6%	0%
Ohio	5%	3%	1%	0%	1%	0%
Arkansas	6%	1%	0%	0%	0%	0%
Iowa	0%	1%	0%	0%	0%	0%

2019 day trips n=160; 2021 day trips n=113; 2022 day trips n=103
a / b indicate statistically significant differences at the 95% level.

Comparing Non-Target Trips Year-Over-Year

General Activities SPRING	2019		2021		2022	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Beaches	75%	31%	64%	43%	80%[b]	40%
Dining out	68%	32%	61%	37%	10%[b]	5%
Relaxing	60%	30%	56%	36%	7%[b]	5%
Shopping	53%	18%	47%	19%	8%[b]	2%
Swimming	47%	15%	38%	19%	7%[b]	3%
Sightseeing	39%	19%	36%	18%	72%[b]	30%
Hiking on trails	15%	6%	18%	10%	9%	5%
Watching wildlife	11%	5%	18%	8%	5%	7%
Exercise/Working out	12%	8%	14%	4%	6%	3%
Historical sites	12%	6%	14%	3%	15%[b]	5%
Fishing	17%	6%	13%	4%	5%[b]	3%
Visiting friends/relatives who live in the area	9%	13%	13%	10%	13%	7%
Photography	13%	6%	13%	11%	15%	5%
Shelling	17%	11%	11%	10%	4%	1%
Bicycle riding	8%	4%	10%	5%	4%	1%
Visiting a spa	6%	6%	9%	3%	9%	8%
Boating or sailing	10%	4%	9%	4%	65%[b]	30%
Concerts and nightlife	11%	3%	9%	5%	3%	1%
Dolphin tour	11%	4%	8%	2%	14%	10%
Kayaking/Canoeing/Paddle boarding	7%	2%	8%	2%	49%	28%
Birdwatching	4%	4%	8%	5%	32%	15%
Festivals or special events (non-sports events)	6%	4%	6%	3%	3%	3%
Golfing	5%	4%	6%	3%	48%	10%
Sporting events	4%	4%	4%	3%	2%	4%
Scuba diving/Snorkeling	6%	4%	4%	3%	4%	4%
Parasailing/Jet skiing	6%	4%	4%	3%	6%	9%
Tennis	2%	4%	3%	3%	18%	7%

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 day trips n=160;
2021 day trips n=113;
2022 day trips n=103
a / b indicate statistically significant differences at the 95% level.

52

Comparing Non-Target Trips Year-Over-Year

Specific Attractions SPRING	2019		2021		2022	
	Target travelers	Non-target Day trip	Target travelers	Non-target Day trip	Target travelers (a)	Non-target Day trip (b)
Dauphin Island	12%	10%	11%	4%	13%	15%
Tanger Outlets	35%	16%	19%	18%	24%[a]	14%
OWA Park	3%	9%	4%	11%	3%	12%
Tropic Falls Indoor Waterpark at OWA					3%	12%[b]
Gulf State Park	19%	4%	15%	12%	19%	12%
Battleship USS Alabama	11%	10%	8%	7%	11%	11%
The Wharf	21%	6%	15%	7%	20%[a]	11%
The Track	3%	3%	5%	3%	10%	9%
Alabama's Coastal Connection Scenic Byway	9%	6%	10%	5%	10%	8%
Alabama Gulf Coast Zoo	13%	7%	8%	8%	14%[a]	7%
Fort Morgan Historic Site	12%	5%	11%	4%	15%[a]	6%
Coastal Birding Trail					5%	4%
Waterville	4%	3%	4%	4%	4%	4%
Bellingrath Gardens	3%	3%	3%	5%	3%	3%
Bon Secour National Wildlife Refuge	5%	0%	2%	3%	4%	3%
Civil War History Trail					7%	3%
Hugh S. Branyon Backcountry Trail	0%	1%	3%	2%	3%	2%
Adventure Island	7%	3%	6%	4%	8%[a]	1%

2019 day trips n=160; 2021 day trips n=113; 2022 day trips n=103
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.