

# EVANS - KLAGES, INC.

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## Fall 2010 Visitor Profile Alabama Gulf Coast Convention & Visitors Bureau



### Prepared for:

Alabama Gulf Coast Convention and Visitors Bureau

### Prepared by:

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President

***Evans - Klages, Inc.***

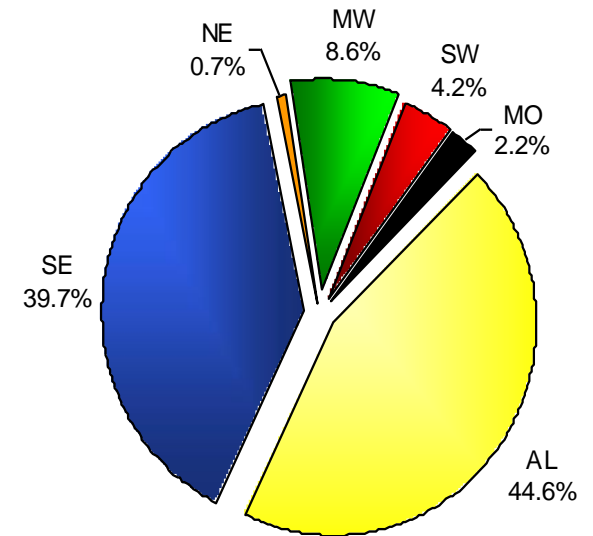
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April 2011

## Fall 2010 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

	Fall '07	Fall '08	Fall '09	Fall '10	'09-'10 % Δ
Number of Visitors	310,720	267,200	288,800	278,000	-3.7
Visitor Expenditures	\$108,111,917	\$90,374,384	\$99,722,640	\$99,065,300	-0.7

**2010 Regional Distribution of Visitors**



Regional Visitor Distribution	Fall '07	Fall '08	Fall '09	Fall '10
Alabama	40.0%	44.6%	41.0%	44.6%
Southeast	38.9	37.0	39.0	39.7
Northeast	1.5	1.3	1.1	0.7
Midwest	11.4	9.9	10.9	8.6
Southwest	3.9	3.5	3.9	4.2
Markets of Opportunity	4.3	3.7	4.1	2.2
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

	Fall 2007		Fall 2008		Fall 2009		Fall 2010	
	Occ.	Rm. Nights	Occ.	Rm. Nights	Occ.	Rm. Nights	Occ.	Rm. Nights
Lodging Occupancy								
Condominium Market	36.8%	167,960	31.6%	149,389	35.2%	172,152	33.7%	163,573
Hotel/Motel Market	58.8	59,505	46.1	46,653	46.8	55,783	51.6	61,126

	Fall 2007	Fall 2008	Fall 2009	Fall 2010
Average Daily Rate				
Condominium Market	\$112.99	\$103.31	\$100.21	\$100.96
Hotel/Motel Market	112.35	116.93	114.76	116.11

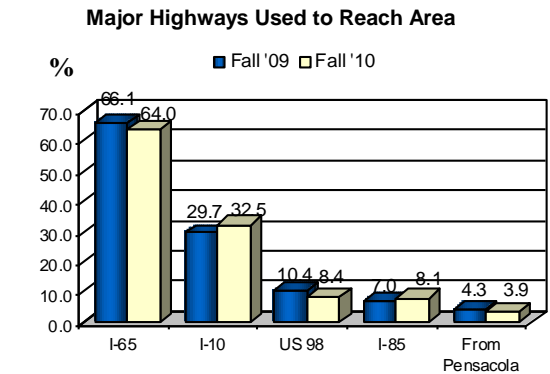
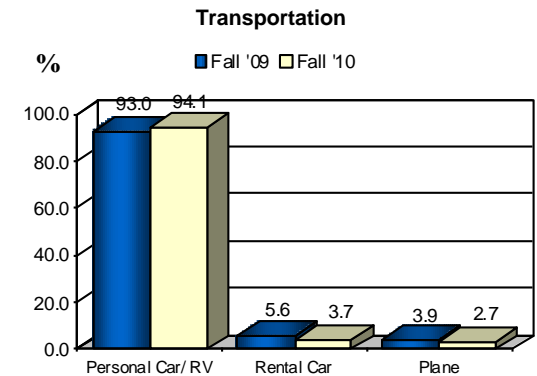
## TOP U.S. FEEDER MARKETS

Core Origin Markets		Fall 2007		Fall 2008		Fall 2009		Fall 2010
'10 Rank		%	'07 Rank	%	'08 Rank	%	'09 Rank	%
1.	Birmingham	20.3%	1	25.4%	1	22.3%	1	23.1%
2.	Huntsville/Decatur	8.5	2	9.1	2	8.8	2	7.7
3.	New Orleans	--	--	--	--	2.9	6	5.0
4.	Nashville	8.1	3	5.6	3	5.9	3	4.7
5.	Mobile/Pensacola <i>(excluding Baldwin County)</i>	--	--	--	--	--	--	4.5
6.	Atlanta	5.2	4	4.8	4	5.5	4	3.7
7.	Montgomery/Selma	--	--	2.4	9	2.6	9	3.5
8.	Baton Rouge	3.4	7	--	--	--	--	3.2
9.	Jackson, MS	--	--	--	--	2.7	8	3.0
10.	Memphis	4.5	5	4.7	5	4.0	5	2.5

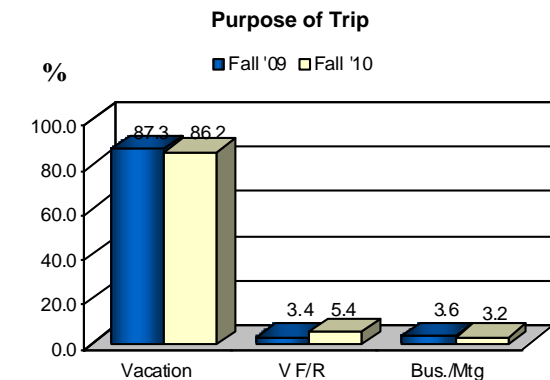
\*\* Please Note: Not in Top Ten Listing

## Fall 2010 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
<b>Transportation Mode (Multiple Response)</b>				
Personal Car/RV	92.6%	93.7%	93.0%	94.1%
Rental Car	6.6	4.4	5.6	3.7
Plane	4.7	3.7	3.9	2.7
<b>Major Highways Used to Reach Area (Multiple Response)</b>				
Interstate 65	69.9%	68.2%	66.1%	64.0%
Interstate 10	30.9	30.3	29.7	32.5
U.S. Highway 98	7.2	7.6	10.4	8.4
Interstate 85	7.0	6.8	7.0	8.1
From Pensacola	3.9	3.3	4.3	3.9



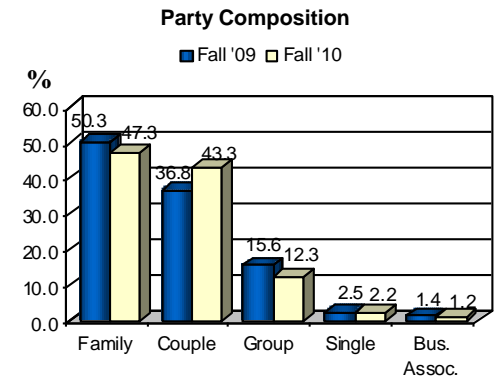
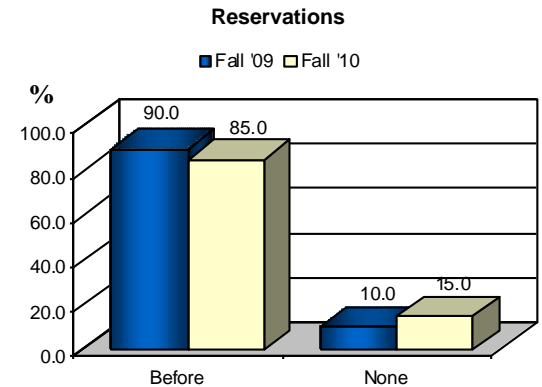
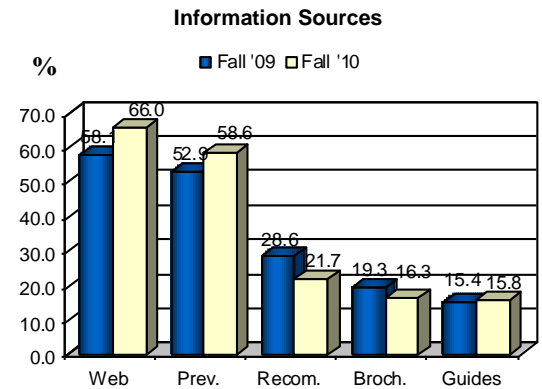
	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
<b>Purpose of Trip (Primary Reason)</b>				
Vacation	78.5%	81.6%	87.3%	86.2%
Visit Friends/Relatives	6.7	5.8	3.4	5.4
Business/Meeting/Conference	7.3	5.2	3.6	3.2
Fishing	2.1	2.5	1.5	1.7
Golfing	2.7	1.0	0.5	1.2



	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
<b>First Visit to Gulf Shores/Orange Beach</b>	36.3%	35.0%	38.8%	32.8%

# Fall 2010 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
<b>Average Repeat Visits to GSH/ORB over past 5 years</b> (Base: Repeat Visitors)	4.0 trips	4.4 trips	4.2 trips	4.8 trips
<b>Information Sources (Multiple Response)</b>				
Internet	51.1%	55.1%	58.1%	66.0%
Previous Visit	53.2	54.4	52.9	58.6
Recommendation by Friend/Relative	28.1	26.1	28.6	21.7
Brochures	18.2	20.4	19.3	16.3
Vacation/Travel Guides	11.3	12.7	15.4	15.8
Convention and Visitors Bureau	6.7	6.9	7.6	8.9
<b>Assisted by Travel Professional</b>	2.4%	3.8%	3.3%	2.0%
<b>Reservations</b>				
Before Arriving in Area	86.6%	83.4%	90.0%	85.0%
None	13.4	16.6	10.0	15.0
	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
<b>Length of Stay in GSH/ORB (days)</b>				
Vacation Trips	6.5	6.7	6.3	6.6
Get-away Trips	2.9	3.1	3.1	3.1
<b>Party Size (Immediate Travel Party)</b>	3.8	3.9	4.0	3.8
<b>Party Composition (Multiple Response)</b>				
Family	48.0%	46.5%	50.3%	47.3%
Couple	35.6	39.0	36.8	43.3
Group of Couples/Friends	17.7	16.4	15.6	12.3
Single	1.7	2.7	2.5	2.2
With Business Associates	2.3	2.1	1.4	1.2
<b>Traveling with Children</b>				
Yes	41.3%	38.7%	44.3%	37.9%
No	58.7	61.3	55.7	62.1



## Fall 2010 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

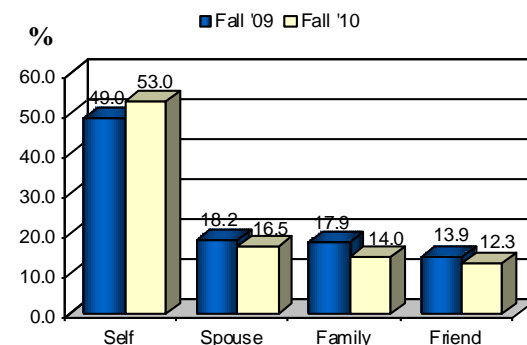
	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
<b>Who First Suggested Our Area for this Trip (Multiple Response)</b>				
Self	43.6%	45.9%	49.0%	53.0%
Spouse/Companion	15.0	20.8	18.2	16.5
Family	22.4	18.7	17.9	14.0
Friend	15.2	12.6	13.9	12.3
<b>% Female Recommending</b>	<b>68.6%</b>	<b>63.1%</b>	<b>64.1%</b>	<b>66.3%</b>

<b>Other Beach Areas Considered (Multiple Response)</b>				
None	49.1%	40.9%	39.3%	33.0%
Florida	43.4	47.8	49.8	56.4
South Carolina	8.1	10.8	12.7	16.7
Mississippi	8.7	9.5	9.8	5.9
North Carolina	5.9	4.1	3.7	5.2
Georgia	6.7	6.1	4.7	3.7

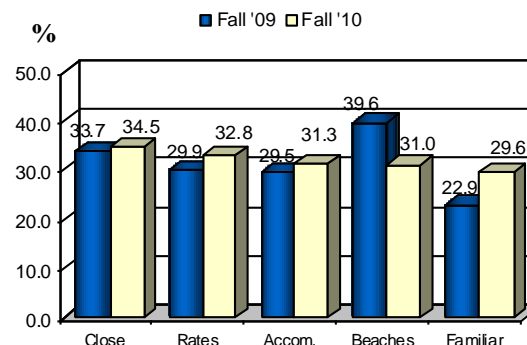
<b>Why Choose GSH/ORB (Multiple Response)</b>				
Close to Home/Convenient Location	37.6%	33.9%	33.7%	34.5%
Reasonable Rates	24.2	26.8	29.9	32.8
Accommodations	21.8	25.1	29.5	31.3
Nice Beaches	33.9	36.1	39.6	31.0
Familiar/Previous Visit	23.8	24.8	22.9	29.6
Weather	21.5	20.7	25.8	28.3
Safe Area	22.8	23.2	29.6	28.1
Not Crowded/Commercial	23.5	25.7	24.2	27.1
Quiet/Laid Back	16.1	19.5	22.2	26.8
Family Oriented	20.6	19.0	23.4	26.4
Food/Restaurants	17.8	18.5	21.4	25.1
Recommended by Friend/Relative	17.6	21.5	23.5	18.5

<b>Attractions Visited (Multiple Response)</b>				
Tanger Mall	48.7%	46.1%	45.1%	46.3%
Gulf State Park	22.4	25.2	29.9	33.3
The Wharf	16.2	19.5	22.9	26.1
Fort Morgan	26.0	22.3	21.1	17.7
Pensacola Naval Museum	12.1	13.2	11.6	13.5
The Track	13.0	11.1	13.7	11.3
Battleship USS Alabama	15.0	12.7	11.8	10.6
Alabama Gulf Coast Zoo	11.9	10.5	9.8	9.4
Bon Secour Wildlife Refuge	9.8	8.4	6.6	9.1
Mobile Bay Ferry	8.5	7.6	6.4	8.9
Dauphin Island	13.2	10.8	9.4	8.6
None	17.3	17.8	15.7	17.7

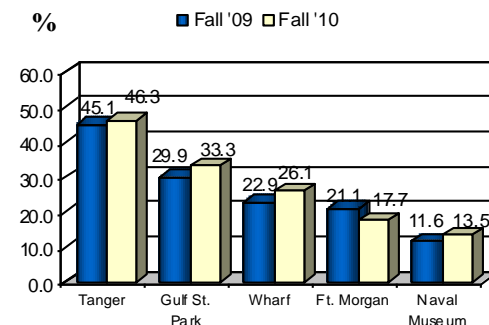
Who First Suggested Our Area for the Trip



Why Choose Gulf Shores/Orange Beach (Top Five)



Attractions Visited (Top Five)



## Fall 2010 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
<b>Satisfaction with GSH/ORB</b>				
Very Satisfied	71.3%	75.6%	76.1%	73.6%
Satisfied	23.6	22.0	19.7	21.7
<b>Satisfaction Level</b>	<b>94.9%</b>	<b>97.6%</b>	<b>95.8%</b>	<b>95.3%</b>

### Activities Enjoyed in GSH/ORB

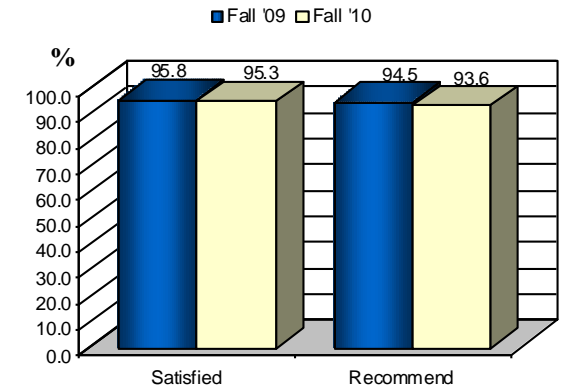
(Multiple Response)

Beaches	90.0%	94.5%	95.9%	94.3%
Relaxing	85.9	80.8	83.0	87.7
Dining Out	84.6	82.9	80.2	84.7
Shopping	66.1	61.6	59.8	65.0
Sight Seeing	39.7	42.5	41.4	41.9
Attractions	30.8	36.1	39.9	34.0
Pool	38.4	34.4	33.6	32.0
Wildlife/Environment	17.8	20.7	21.0	17.5
Photography	18.6	17.7	18.8	16.5
Seafood/Shrimp Fest	17.7	16.0	15.5	16.3
Fishing	19.2	15.6	17.1	15.3
Visiting Friends/Relatives	12.8	13.2	12.2	14.0
Golfing	13.1	11.5	11.2	13.1
Bars/Night Life	10.5	8.4	9.5	11.8
Miniature Golf	12.9	9.7	12.3	11.6

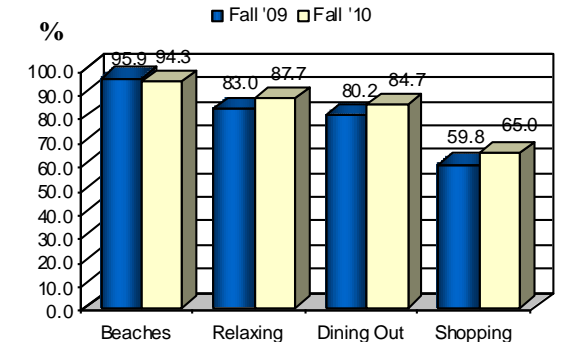
	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
<b>Recommend GSH/ORB to Friends/Relatives</b>				
(% yes)	94.2%	93.2%	94.5%	93.6%
<b>Plan to Return (% yes)</b>				
To Local Area	86.7%	89.2%	91.6%	92.6%
Next Year (Base: Return to Local Area)	64.6	66.8	66.5	60.9
<b>Median Age Head of Household (years)</b>	48.2	49.5	49.2	48.1
<b>Median Annual Household Income *</b>	\$71,056	\$75,000	\$73,603	\$72,026

\* Please Note: Median Household Income After Taxes

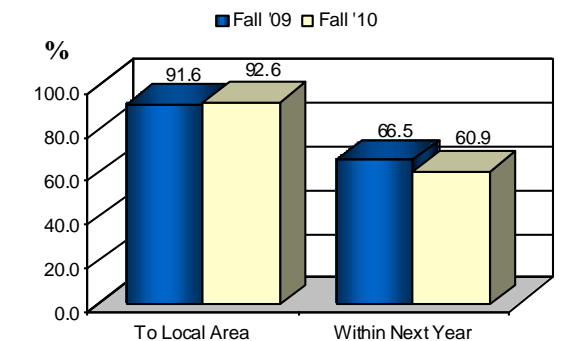
Satisfaction/Recommend Gulf Shores/Orange Beach



Activities Enjoyed (Top Four)



Plan to Return

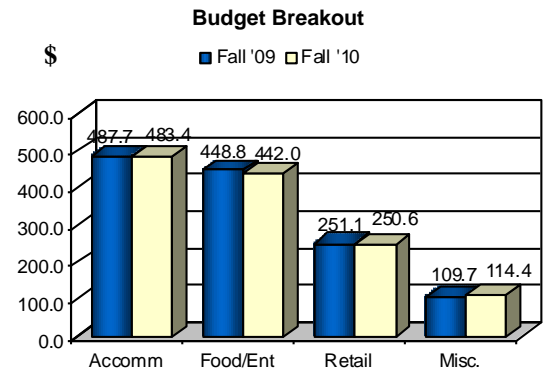


# Fall 2010 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
<b>Visitor Party Budget</b> (GSH/ORB Stay: Food/Lodging/Entertainment)				
Total	\$1,322.18	\$1,319.05	\$1,381.21	\$1,354.13
Per Person/Trip	347.94	338.22	345.30	356.35
Per Person/Day	77.32	73.53	73.47	77.47

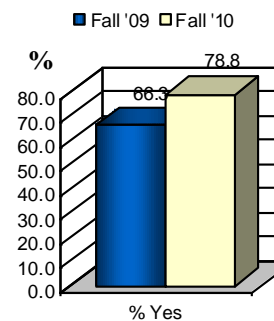
## Visitor Party Budget Breakout (GSH/ORB Stay)

	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
Accommodations	\$508.00	\$490.00	\$487.70	\$483.40
Food/Entertainment	414.02	428.90	448.75	441.96
Retail/Grocery	247.47	244.80	251.09	250.64
Miscellaneous Exp.	105.21	104.57	109.74	114.36

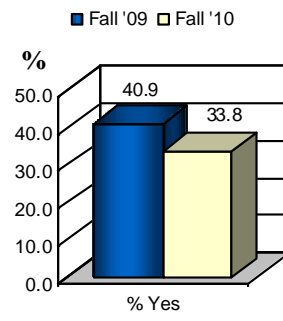


	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>Fall 2010</u>		
				<u>Total</u>	<u>First Time</u>	<u>Repeat</u>
<b>See/Read/Hear GSH/ORB Beach Message</b>	62.5%	63.4%	66.3%	78.8%	80.5%	78.0%
<b>Type of Message Seen</b>						
Internet	61.2%	67.3%	73.9%	81.2%	89.7%	77.0%
Television	18.8	15.4	17.5	39.4	29.9	44.1
Newspaper Story	7.4	7.3	6.6	24.4	20.6	26.3
Brochure	23.9	25.5	24.2	20.9	31.8	15.5
Radio	5.4	N/A	0.7	18.4	15.9	19.7
Travel/Visitor Guide	19.7	18.4	17.6	14.1	21.5	10.3
Magazine Ad	20.4	17.0	17.2	13.8	14.0	13.6
Magazine Story	8.4	5.6	7.0	6.6	5.6	7.0
Newspaper Ad	5.3	5.9	8.0	5.3	6.5	4.7

## See/Hear/Read Message



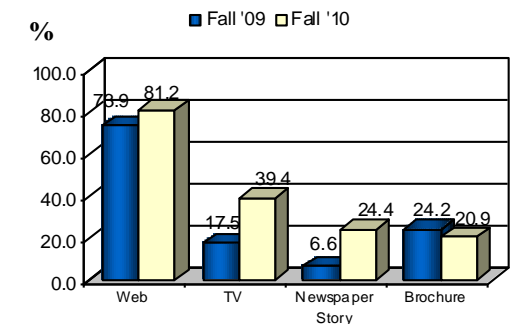
## Influenced by Message



## Influenced by GSH/ORB Message

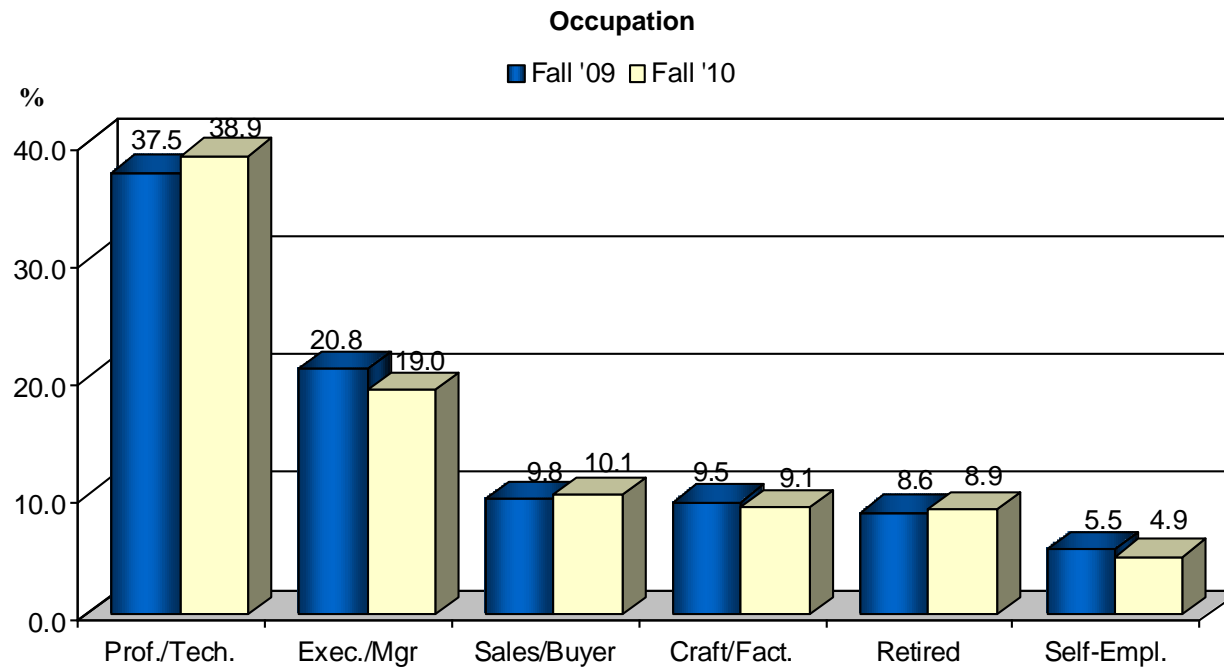
	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
(Base: Respondents Reporting See/Read/Hear Message)	38.7%	39.7%	40.9%	33.8%

## Type of Message Seen (Top Four)



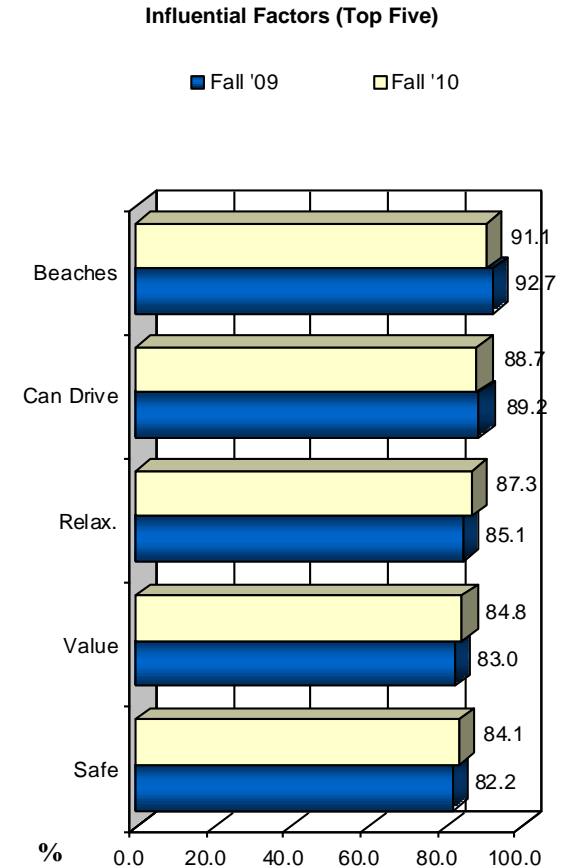
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Occupation	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
Professional/Technical	39.6%	36.6%	37.5%	38.9%
Executive/Managerial	18.4	19.4	20.8	19.0
Salesman/Buyer	4.9	9.7	9.8	10.1
Craft/Factory	13.3	10.0	9.5	9.1
Retired	8.9	9.4	8.6	8.9
Self-Employed	5.6	6.6	5.5	4.9



**Influential Factors in Choosing Gulf Shores/Orange Beach**

	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
White, Sandy Beaches	90.5%	92.2%	92.7%	91.1%
I Can Drive There With My Family	90.6	90.8	89.2	88.7
Complete Relaxation	88.3	85.9	85.1	87.3
Good Value for the Money	84.3	81.8	83.0	84.8
Safe Destination	84.2	83.1	82.2	84.1
Warm Weather	76.8	76.1	72.4	75.5
Good Restaurants/Dining Out	75.5	73.1	71.7	75.2
Reasonably Priced Lodging	74.9	73.4	75.8	73.2
Family Atmosphere	74.6	71.6	75.5	72.4
Clean, Unspoiled Environment	71.5	72.7	73.2	70.6
Uncommercialized Beaches	62.1	63.0	65.0	67.0
Sunning on the Beach	61.7	55.5	57.7	59.0
Upscale Accommodations	52.4	51.4	50.8	55.6
Safe Beaches for Children	59.3	56.7	59.8	53.3
Shopping	40.6	44.5	42.5	46.7
Romantic Place	40.0	37.1	34.4	38.5
Good Fishing	17.6	16.8	17.7	16.0
Good Golfing	13.3	14.1	13.1	15.8
Good Boating	11.8	12.9	12.3	14.1



## Fall 2010 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

	<u>2009</u>	<u>2010</u>
<b>Requested Additional Information</b>		
<b>About Area for Trip (Multiple Response)</b>		
Did not request information	36.0%	30.3%
Accessed www.gulfshores.com	29.5	32.5
Accessed individual hotel/motel/condominium website	31.1	32.3
Accessed destination sites for Gulf Shores/Orange Beach	26.5	24.9
Accessed an Internet travel site	18.6	19.7
Called a hotel/motel/condominium toll-free number	8.7	9.6
Called the CVB toll-free number	3.3	3.4
<hr/>		
<b>Have Access to the Internet</b>	96.7%	97.5%
<hr/>		
<b>Seek Out Travel Information On-Line</b> (BASE: Those with Internet Access)	93.4%	96.2%
<hr/>		
<b>Ever Book Reservations On-Line</b> (BASE: Those with Internet Access)	72.7%	76.3%
<hr/>		
<b>Used the Internet to Gather Travel Information for this Trip</b> (BASE: Those who Seek Travel Information On-Line)	92.4%	96.3%
First Time	98.8%	96.0%
Repeat	87.8	97.1
<hr/>		
<b>Booked Reservations for this Trip on the Internet</b> (BASE: Those who Seek Travel Information On-Line)	45.3%	50.9%
<hr/>		
<b>Accessed the Website www.gulfshores.com</b> (BASE: Those who Seek Travel Information On-Line)	44.6%	49.6%
<hr/>		
<b>Sources of Information About Destination Once Arrive in Area</b> (Multiple Response)		
Don't look for information once in area	33.1%	29.3%
Visitor guides	36.3	34.2
Front desk personnel	31.3	27.6
Maps	20.8	19.7
Internet	16.5	18.7
Local information TV channel	16.3	18.2
Visitor welcome centers	15.0	18.0
Waiters/waitresses	15.5	17.5
Smartphones/Navigation Systems	8.0	15.0

**Planning/Reservation Window Analysis**  
*Days to Arrival*

