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Summer 2011 Visitor Profile Alabama Gulf Coast Convention & Visitors Bureau



Prepared for:

Alabama Gulf Coast Convention and Visitors Bureau

Prepared by:

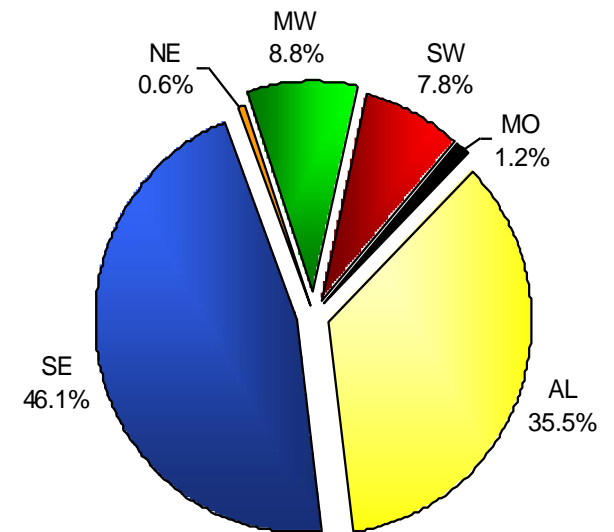
Walter J. Klages, Ph.D.
President
Evans - Klages, Inc.

November 2011

Summer 2011 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

	Summer '08	Summer '09	Summer '10	Summer '11	'10-'11 % Δ
Number of Visitors	555,380	574,100	346,900	593,600	+71.1
Visitor Expenditures	\$243,689,636	\$241,162,187	\$144,091,853	\$284,144,400	+97.2

2011 Regional Distribution of Visitors



Regional Visitor Distribution	Summer '08	Summer '09	Summer '10	Summer '11
Alabama	35.1%	34.9%	37.0%	35.5%
Southeast	49.9	50.4	45.6	46.1
Northeast	0.6	0.9	0.5	0.6
Midwest	10.5	10.0	8.3	8.8
Southwest	3.4	3.1	7.0	7.8
Markets of Opportunity	0.5	0.7	1.6	1.2
Total	100.0%	100.0%	100.0%	100.0%

	Summer 2008		Summer 2009		Summer 2010		Summer 2011	
	Occ.	Rm. Nights	Occ.	Rm. Nights	Occ.	Rm. Nights	Occ.	Rm. Nights
Lodging Occupancy								
Condominium Market	68.6%	518,465	67.2%	531,081	37.9%	322,041	69.2%	597,037
Hotel/Motel Market	76.4	116,608	73.6	132,309	60.9	109,479	78.6	152,072

Average Daily Rate	Summer 2008	Summer 2009	Summer 2010	Summer 2011
	Condominium Market	\$209.96	\$194.40	\$173.65
Hotel/Motel Market	168.14	164.69	127.25	138.64

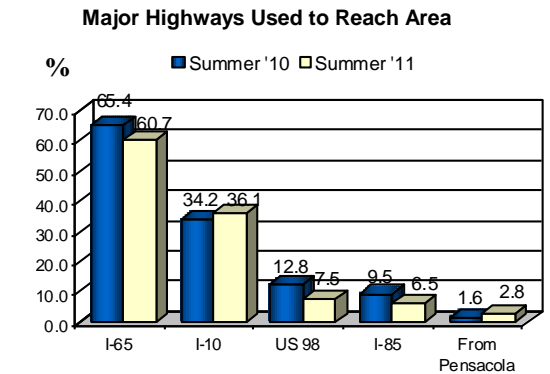
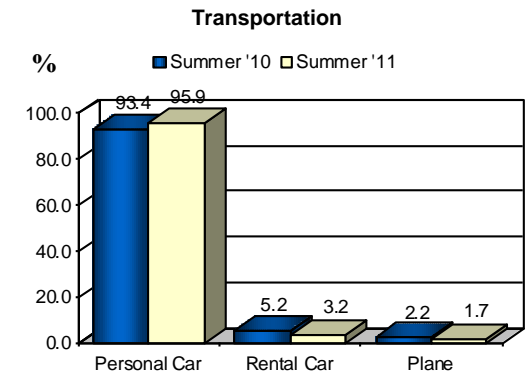
TOP U.S. FEEDER MARKETS

Core Origin Markets		Summer 2008		Summer 2009		Summer 2010		Summer 2011
'11 Rank		%	'08 Rank	%	'09 Rank	%	'10 Rank	%
1.	Birmingham	16.8%	1	17.8%	1	20.9%	1	19.8%
2.	New Orleans	3.2	7	3.8	6	5.2	4	6.6
3.	Huntsville/Decatur	11.0	2	9.4	2	7.0	2	6.4
4.	Nashville	7.1	4	7.8	3	5.8	3	5.2
5.	Mobile	2.8	8	2.6	10	3.2	8	4.3
6.	Memphis	6.1	5	5.8	5	4.7	5	4.0
7.	Montgomery	3.5	6	3.2	7	3.6	6	3.7
8.	Baton Rouge	2.3	10	3.0	8	2.9	10	3.7
9.	Jackson, MS	2.6	9	2.8	9	3.1	9	2.9
10.	Atlanta	7.4	3	6.4	4	3.4	7	2.8
11.	Lafayette, LA	--	--	--	--	--	--	2.8

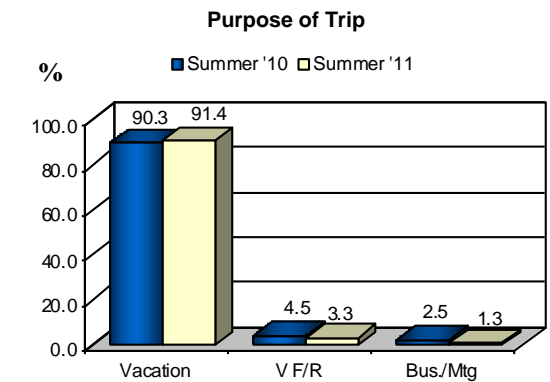
** Please Note: Not in Top Ten Listing

Summer 2011 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
Transportation Mode				
Personal Car/RV	93.5%	94.4%	93.4%	95.9%
Rental Car	6.1	5.4	5.2	3.2
Plane	1.9	1.8	2.2	1.7
Major Highways Used to Reach Area				
Interstate 65	68.3%	67.0%	65.4%	60.7%
Interstate 10	31.1	33.4	34.2	36.1
U.S. Highway 98	16.8	12.5	12.8	7.5
Interstate 85	11.9	7.8	9.5	6.5
From Pensacola	1.8	1.8	1.6	2.8



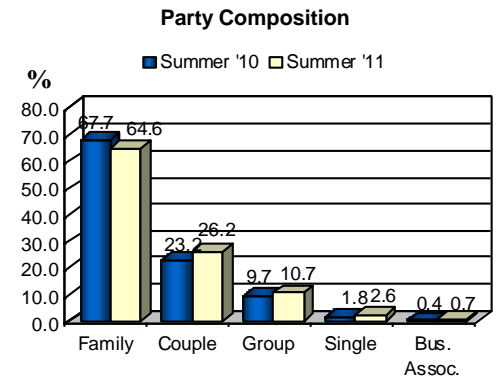
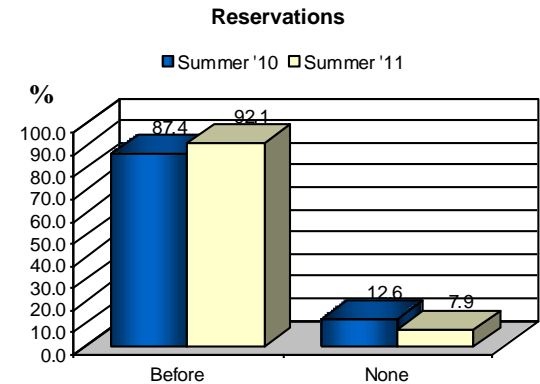
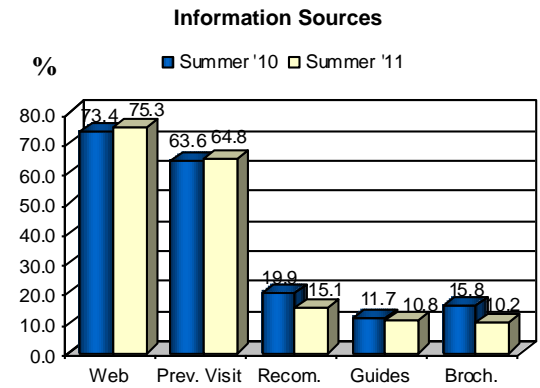
	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
Purpose of Trip (Primary Reason)				
Vacation	92.7%	92.1%	90.3%	91.4%
Visit with Friends/Relatives	2.1	2.6	4.5	3.3
Business/Meeting/Conference	4.0	2.2	2.5	1.3



	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
First Visit to Gulf Shores/Orange Beach	29.6%	27.9%	26.0%	23.2%

Summer 2011 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
Average Repeat Visits to GSH/ORB over past 5 years (Base: Repeat Visitors)	3.9 trips	4.0 trips	4.6 trips	4.3 trips
Information Sources (Multiple Response)				
Internet	67.4%	69.6%	73.4%	75.3%
Previous Visit	60.7	62.6	63.6	64.8
Recommendation by Friend/Relative	24.7	20.5	19.9	15.1
Vacation/Travel Guides	15.6	14.4	11.7	10.8
Brochures	27.4	24.8	15.8	10.2
Convention and Visitors Bureau	7.1	7.0	4.3	4.6
Television	2.7	2.7	4.7	3.9
Assisted by Travel Professional	2.1%	2.9%	2.5%	4.2%
Reservations				
Before Arriving in Area	91.5%	90.2%	87.4%	92.1%
None	8.5	9.8	12.6	7.9
	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
Length of Stay in GSH/ORB (days)				
Get-away Trips	3.2	3.3	3.2	3.3
Vacation Trips	6.5	6.4	6.4	6.4
Party Size (Immediate Travel Party)	4.5	4.5	4.1	4.2
Party Composition (Multiple Response)				
Family	78.2%	72.4%	67.7%	64.6%
Couple	14.7	18.3	23.2	26.2
Group of Couples/Friends	13.4	17.3	9.7	10.7
Single	1.7	0.9	1.8	2.6
With Business Associates	1.5	0.8	0.4	0.7
Traveling with Children				
Yes	77.0%	70.8%	63.9%	60.9%
No	23.0	29.2	36.1	39.1



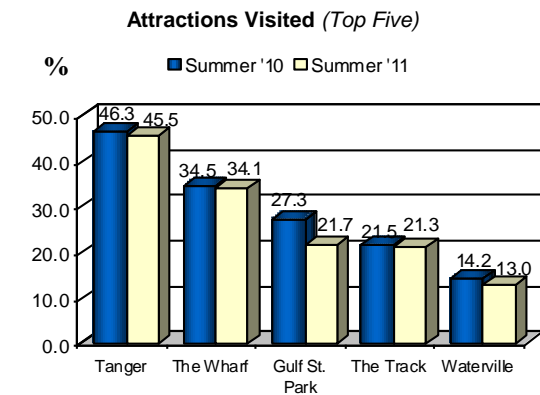
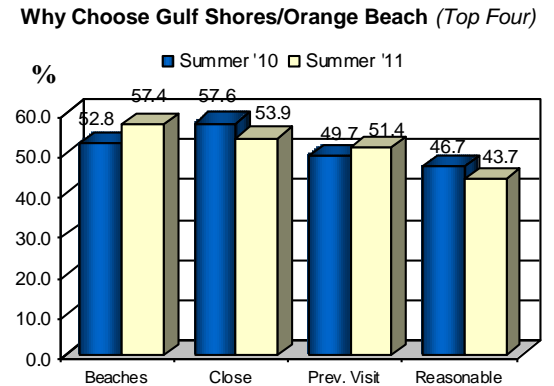
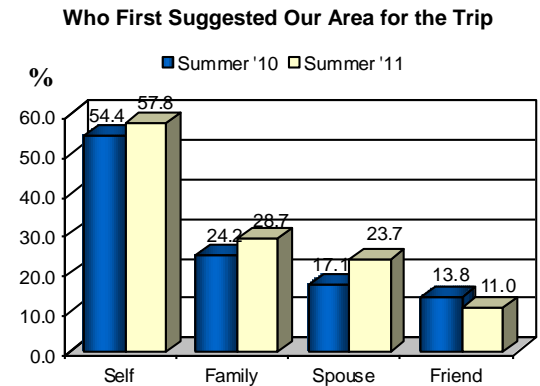
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	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
Who First Suggested Our Area for this Trip (Multiple Response)				
Self	54.0%	55.9%	54.4%	57.8%
Family	23.7	26.8	24.2	28.7
Spouse/Companion	12.0	11.3	17.1	23.7
Friend	13.2	14.7	13.8	11.0
% Female Recommending	69.5%	65.4%	56.0%	60.7%

Other Beach Areas Considered (Multiple Response)				
Florida	58.1%	53.4%	57.3%	54.7%
South Carolina	11.8	9.2	10.1	9.0
North Carolina	8.2	5.8	6.6	6.1
Louisiana	2.6	2.3	5.4	6.0
Mississippi	5.0	5.0	8.3	5.7
Georgia	5.8	3.3	4.8	5.1
Texas	4.9	3.1	5.0	3.1
None	33.6	38.7	33.2	38.3

Why Choose GSH/ORB (Multiple Response)				
Nice Beaches	41.8%	41.1%	52.8%	57.4%
Close to Home	38.3	41.5	57.6	53.9
Previous Visit	28.1	27.6	49.7	51.4
Reasonable Rates	19.3	18.3	46.7	43.7
Quiet/Laid Back	18.2	20.0	40.4	43.0
Family Oriented	29.3	24.9	33.2	37.9
Not Crowded/Commercial	11.5	13.3	36.3	33.6
Clean	17.4	15.8	21.5	26.6
Accommodations	19.8	16.5	27.5	25.5
Safe Area	16.7	14.8	18.1	22.1
Recommended	22.3	17.1	21.2	18.3

Attractions Visited (Multiple Response)				
Tanger Center	49.0%	47.4%	46.3%	45.5%
The Wharf	25.8	27.9	34.5	34.1
Gulf State Park	23.4	21.4	27.3	21.7
The Track	25.6	25.7	21.5	21.3
Waterville	15.8	13.6	14.2	13.0
Fort Morgan	19.5	16.0	15.3	12.1
Alabama Gulf Coast Zoo	14.3	10.4	12.9	11.3
Pensacola Naval Museum	10.4	8.1	11.5	11.2
Battleship USS Alabama	11.1	10.3	8.4	6.3
None	15.0	17.7	20.1	20.7



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	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
Satisfaction with GSH/ORB				
Very Satisfied	71.3%	70.1%	69.3%	73.2%
Satisfied	<u>22.4</u>	<u>25.3</u>	<u>21.5</u>	<u>22.0</u>
Satisfaction Level	93.7%	95.4%	90.8%	95.2%

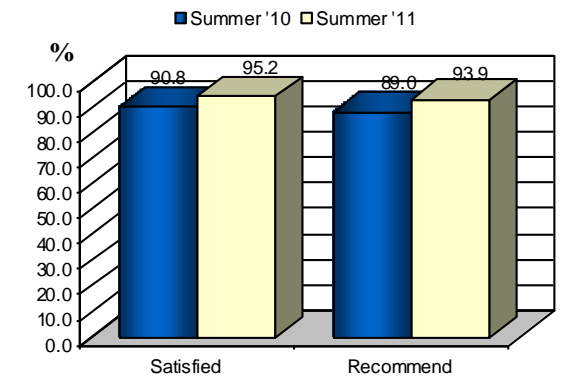
Activities Enjoyed in GSH/ORB

(Multiple Response)

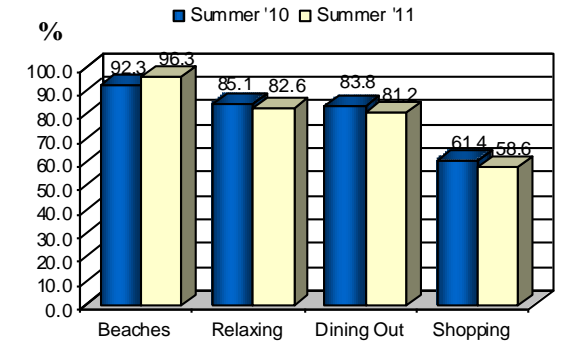
Beaches	97.6%	97.8%	92.3%	96.3%
Relaxing	85.0	83.3	85.1	82.6
Dining Out	84.0	82.0	83.8	81.2
Shopping	65.3	62.3	61.4	58.6
Pool	54.8	51.8	53.1	56.4
Sight Seeing	50.7	46.7	44.9	41.3
Attractions	41.1	39.6	35.9	32.2
Miniature Golf	19.7	18.9	19.7	23.2
Wildlife/Environment	24.4	24.0	17.4	21.3
Photography	25.9	23.7	21.4	19.1
Fishing	19.5	17.0	13.1	18.4
Bars/Night Life	13.7	12.1	14.9	16.8
Visiting with Friends/Relatives	14.4	16.0	18.0	15.5
Golfing	8.5	11.5	13.6	9.8
Movies	10.4	7.4	7.9	6.1

	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
Recommend GSH/ORB to Friends/Relatives				
(% yes)	92.2%	90.3%	89.0%	93.9%
Plan to Return (% yes)				
To Local Area	88.9%	89.9%	87.4%	92.3%
Next Year (BASE: All Respondents)	55.7	59.2	57.5	59.4
Median Age Head of Household (years)	44.8	44.3	43.0	44.8
Median Annual Household Income	\$85,588	\$83,453	\$86,357	\$89,023

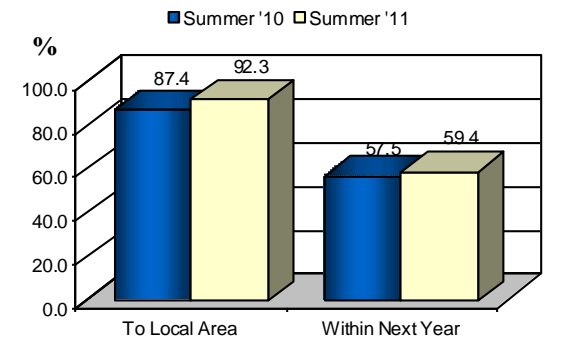
Satisfaction/Recommend Gulf Shores/Orange Beach



Activities Enjoyed (Top Four)



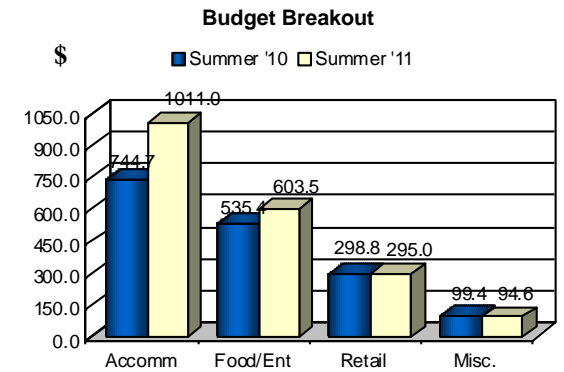
Plan to Return



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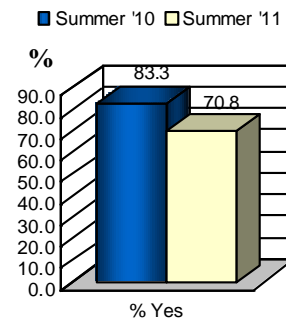
	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
Visitor Party Budget (GSH/ORB Stay: Food/Lodging/Entertainment)				
Total	\$1,974.49	\$1,890.32	\$1,703.02	\$2,010.47
Per Person/Trip	438.78	420.07	415.37	478.68
Per Person/Day	82.79	80.78	81.45	90.32

	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
Visitor Party Budget Breakout (GSH/ORB Stay)				
Accommodations	\$975.00	\$889.60	\$744.65	\$1,011.02
Food/Entertainment	559.03	580.12	535.39	603.48
Retail/Grocery	298.53	290.63	298.75	294.97
Miscellaneous Exp.	110.08	103.39	99.37	94.60

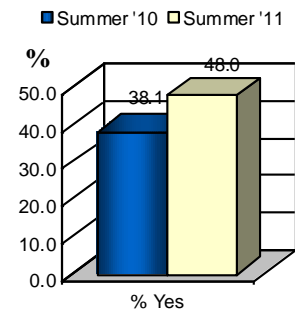


	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>Summer 2011</u>		
				<u>All</u>	<u>First Time</u>	<u>Repeat</u>
See/Read/Hear GSH/ORB Information/News	66.3%	64.2%	83.3%	70.8%	56.2%	75.3%

See/Hear/Read Info

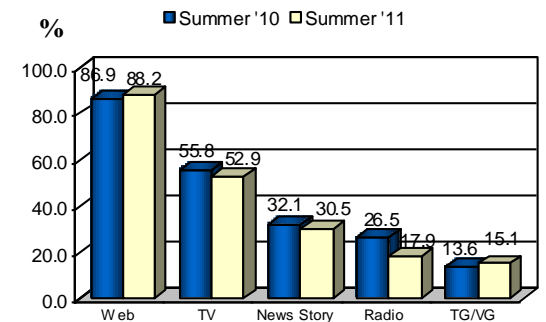


Influenced by Info



	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>Summer 2011</u>		
				<u>All</u>	<u>First Time</u>	<u>Repeat</u>
Type of Information Seen (BASE: Respondents Reporting See/Read/Hear Info) (Multiple Response)						
Internet	69.0%	71.9%	86.9%	88.2%	93.0%	87.1%
Television	18.6	16.5	55.8	52.9	45.8	54.6
Newspaper Story	9.2	6.1	32.1	30.5	11.9	34.7
Radio	7.0	3.3	26.5	17.9	4.9	20.8
Travel/Visitor Guide	17.7	17.0	13.6	15.1	27.6	12.3
Magazine Ad	27.3	22.9	15.5	14.3	13.5	14.5
Brochure	32.5	29.4	16.6	12.1	33.1	7.4
Magazine Story	10.9	7.9	11.4	8.2	14.0	6.9
Newspaper Ad	8.2	7.7	8.8	6.5	9.7	5.8

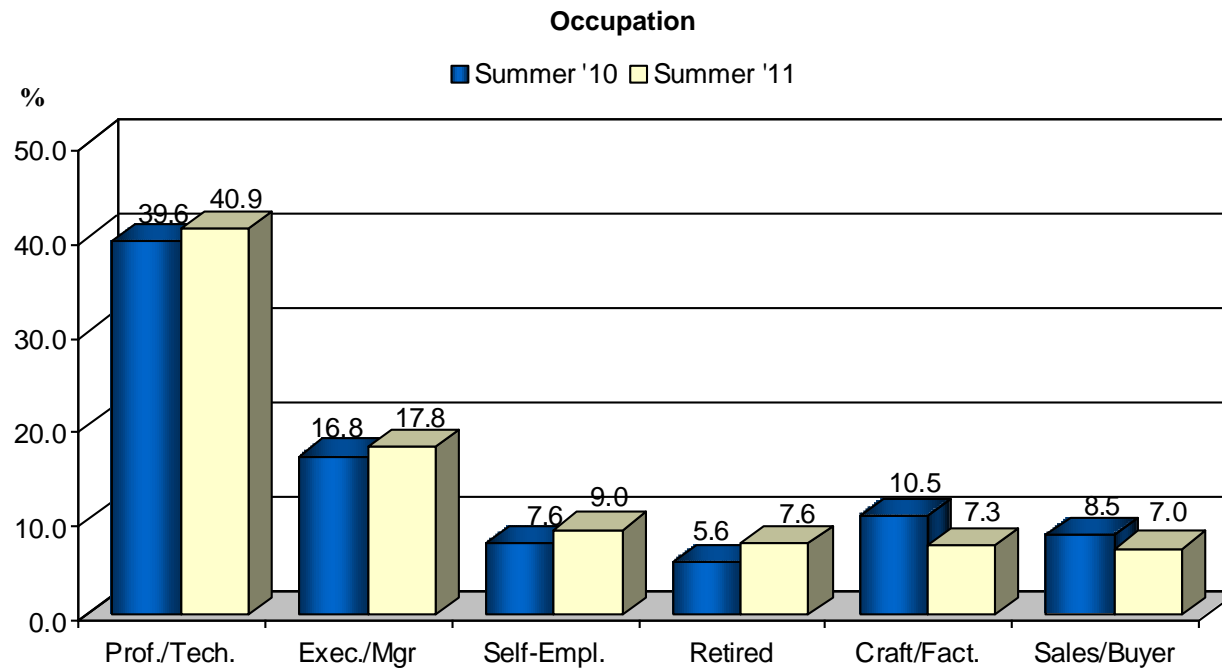
Type of Info Seen (Top Five)



	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>Summer 2011</u>		
				<u>All</u>	<u>First Time</u>	<u>Repeat</u>
Influenced by GSH/ORB Info (BASE: Respondents Reporting See/Read/Hear Info)	47.3%	45.5%	38.1%	48.0%	71.2%	42.7%

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Occupation	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
Professional/Technical	42.3%	42.0%	39.6%	40.9%
Executive/Managerial	18.9	17.5	16.8	17.8
Self-Employed	7.5	8.2	7.6	9.0
Retired	5.6	5.0	5.6	7.6
Craft/Factory	11.9	10.3	10.5	7.3
Salesman/Buyer	5.4	7.8	8.5	7.0

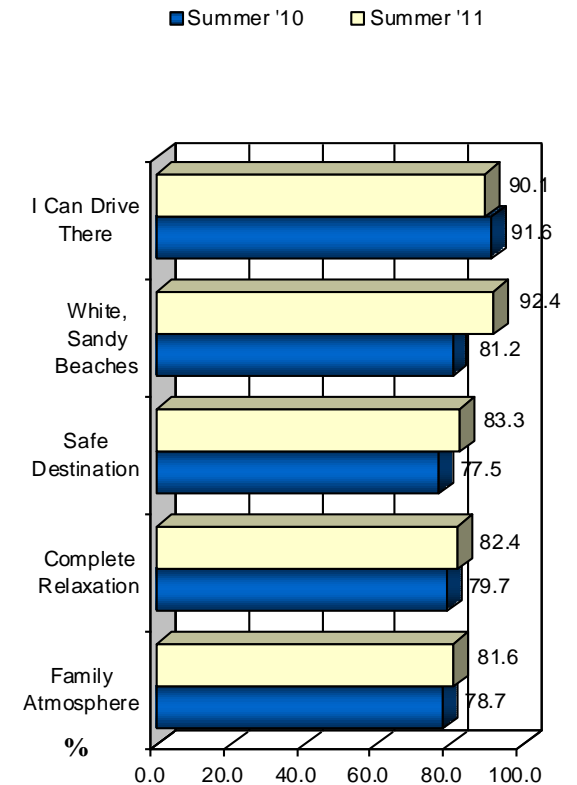


Summer 2011 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

Influential Factors in Choosing Gulf Shores/Orange Beach

	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
I Can Drive There With My Family	93.4%	92.1%	91.6%	90.1%
White, Sandy Beaches	92.0	89.9	81.2	92.4
Safe Destination	87.9	85.7	77.5	83.3
Complete Relaxation	84.1	81.5	79.7	82.4
Family Atmosphere	82.8	79.2	78.7	81.6
Good Value for the Money	76.7	72.7	82.0	79.2
Reasonably Priced Lodging	74.5	70.0	81.3	78.1
Warm Weather	73.1	70.8	75.5	76.5
Clean, Unspoiled Environment	75.3	77.8	61.8	75.7
Sunning on the Beach	76.8	77.2	69.1	74.5
Good Restaurants/Dining Out	73.1	74.4	76.6	74.4
Safe Beaches for Children	76.0	72.4	62.1	72.4
Uncommercialized Beaches	67.0	66.2	66.0	68.6
Upscale Accommodations	58.0	54.8	59.7	56.8
Shopping	42.7	46.4	47.9	51.9
Romantic Place	34.9	32.0	36.8	35.7
Good Fishing	20.7	18.1	15.6	20.5
Good Boating	12.4	12.6	9.7	15.7
Good Golfing	16.6	16.1	14.4	14.7

Influential Factors (Top Five)



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	<u>2010</u>	<u>2011</u>
Use the Internet	98.7%	98.9%
Seek Out Travel Information On-Line (BASE: Those who Use the Internet)	96.7%	97.3%
Ever Book Reservations On-Line (BASE: Those who Use the Internet)	81.6%	83.9%
Used the Internet to Gather Travel Information for this Trip (BASE: Those who Seek Travel Information On-Line)	96.4%	93.0%
First Time	97.8%	98.1
Repeat	95.9	91.5
Booked Reservations for this Trip on the Internet (BASE: Those who Seek Travel Information On-Line)	53.6%	59.8%
Accessed the Website www.gulfshores.com (BASE: Those who Seek Travel Information On-Line)	59.6%	58.3%

	<u>2010</u>	<u>2011</u>
Requested Information about Area for Trip (Multiple Response)		
Accessed www.gulfshores.com	42.0%	41.2%
Accessed individual hotel/motel/condominium website	32.7	38.3
Accessed destination sites for Gulf Shores/Orange Beach	23.2	27.5
Accessed an on-line travel website	18.7	18.3
Called a hotel/motel/condominium toll-free number	10.2	7.5
Called the CVB toll-free number	4.7	3.9
Did not request information	28.9	24.7

	<u>2010</u>	<u>2011</u>
Sources of Information about Destination Once Arrive in Area (Multiple Response)		
Visitor guides	28.7%	30.6%
Front desk personnel	28.2	24.5
Internet	22.6	23.7
Smartphones/PDA's/iPod's/Navigation Systems	13.8	20.4
Visitor welcome centers	18.7	19.9
Local information TV channel	16.2	15.7
Waiters/waitresses	16.0	15.3
Maps	18.1	14.3
Don't look for information once in area	24.8	21.6

