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Winter 2009/10 Visitor Profile Alabama Gulf Coast Convention & Visitors Bureau



Prepared for:

Alabama Gulf Coast Convention and Visitors Bureau

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President

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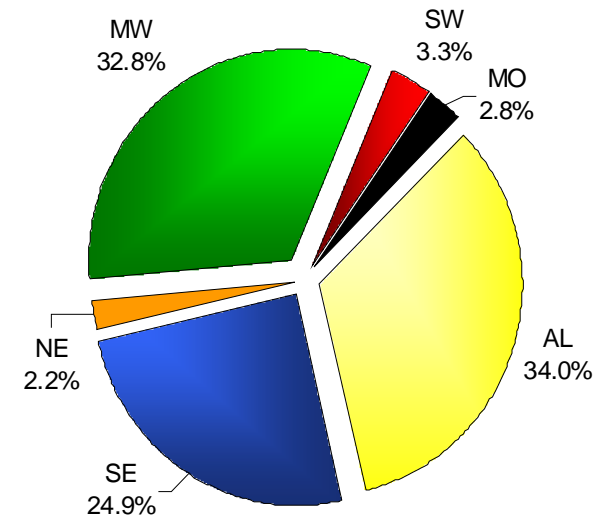
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May 2010

Winter 2009/10 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

	Winter '06	Winter '07	Winter '08	Winter '09	'08-'09 % Δ
Number of Visitors	247,300	249,900	230,200	232,000	+0.8%
Visitor Expenditures	\$101,751,585	\$105,535,269	\$96,414,700	\$95,500,480	-0.9

2009/'10 Regional Distribution of Visitors



Regional Visitor Distribution	Winter '06	Winter '07	Winter '08	Winter '09
Alabama	29.1%	31.8%	32.8%	34.0%
Southeast	23.2	21.9	21.3	24.9
Northeast	2.5	3.0	2.1	2.2
Midwest	38.8	37.3	38.4	32.8
Southwest	3.6	3.3	3.0	3.3
Markets of Opportunity	2.8	2.7	2.4	2.8
Total	100.0%	100.0%	100.0%	100.0%

	Winter 2006		Winter 2007		Winter 2008		Winter 2009	
	Occ.	Rm. Nights	Occ.	Rm. Nights	Occ.	Rm. Nights	Occ.	Rm. Nights
Lodging Occupancy	13.8%	84,704	16.9%	89,020	14.8%	81,327	17.1%	87,471
Condominium Market	13.8%	84,704	16.9%	89,020	14.8%	81,327	17.1%	87,471
Hotel/Motel Market	39.4	72,575	35.0	70,259	29.2	68,468	26.3	61,668

Average Daily Rate	Winter 2006	Winter 2007	Winter 2008	Winter 2009
	Condominium Market	\$66.39	\$64.91	\$64.06
Hotel/Motel Market	74.39	82.31	76.69	72.69

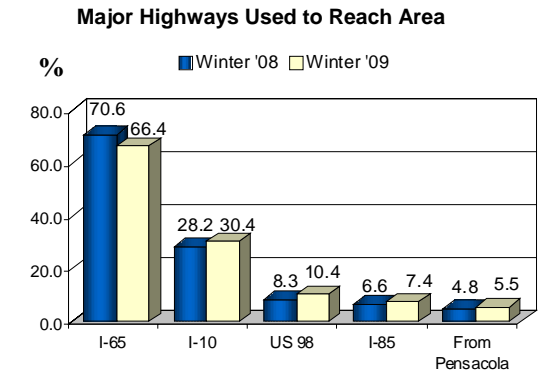
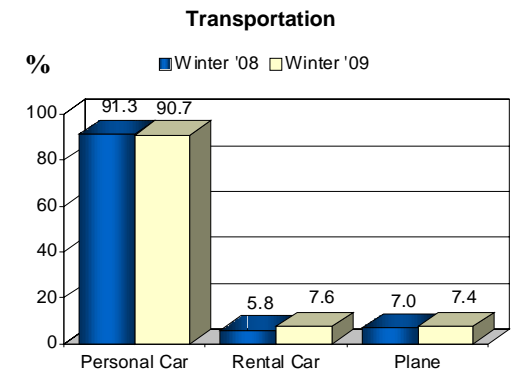
TOP U.S. FEEDER MARKETS

Core Origin Markets		Winter 2006/'07		Winter 2007/'08		Winter 2008/'09		Winter 2009/'10
'09 Rank		%	'06 Rank	%	'07 Rank	%	'08 Rank	%
1.	Birmingham	14.6%	1	16.1%	1	17.1%	1	16.5%
2.	Huntsville/Decatur	6.5	2	6.1	2	6.9	2	6.1
3.	Mobile/Pensacola (excluding Baldwin County)	3.7	7	**	**	**	**	4.6
4.	Montgomery/Selma	4.2	4	4.9	3	6.0	3	4.5
5.	Nashville	3.6	8	4.4	4	4.0	4	3.5
6.	Atlanta	4.7	3	4.0	5	3.4	6	3.1
7.	New Orleans	**	**	**	**	**	**	3.0
8.	St. Louis	**	**	**	**	2.7	9	2.9
9.	Minneapolis/St. Paul	4.0	5	3.7	7	3.8	5	2.7
10.	Indianapolis	**	**	**	**	**	**	2.2

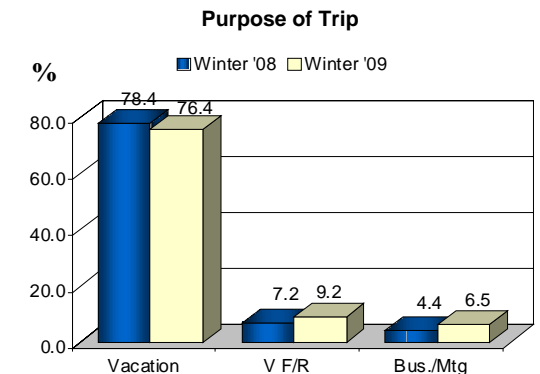
** Please Note: Not in Top Ten Listing

Winter 2009/10 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Transportation Mode (Multiple Response)				
Personal Car/RV	86.3%	84.9%	91.3%	90.7%
Rental Car	11.2	12.0	5.8	7.6
Plane	12.1	13.3	7.0	7.4
Major Highways Used to Reach Area (Multiple Response)				
Interstate 65	69.3%	68.5%	70.6%	66.4%
Interstate 10	25.9	21.9	28.2	30.4
U.S. Highway 98	6.7	8.8	8.3	10.4
Interstate 85	6.8	7.8	6.6	7.4
From Pensacola	7.1	6.2	4.8	5.5



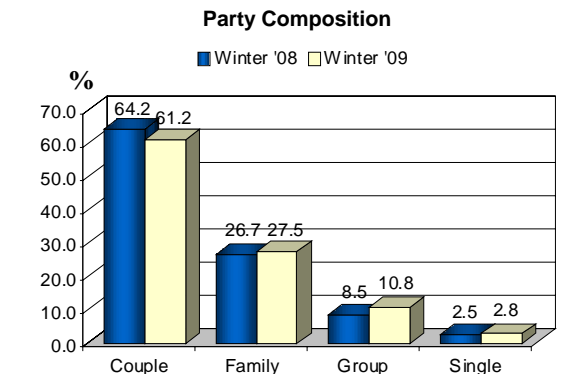
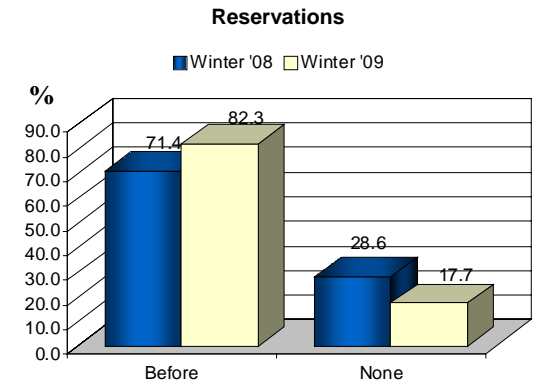
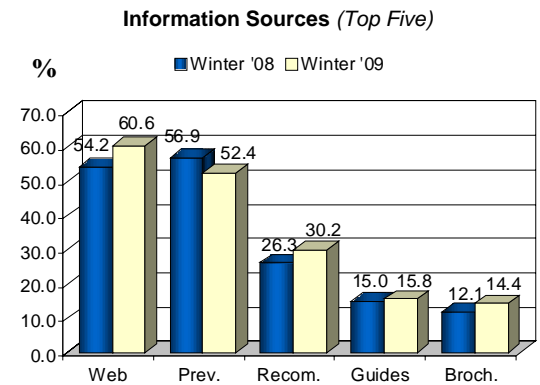
	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Purpose of Trip (Primary Reason)				
Vacation	77.5%	77.1%	78.4%	76.4%
Visit Friends/Relatives	10.3	9.9	7.2	9.2
Business/Meeting/Conference	6.9	7.8	4.4	6.5
Golfing	2.7	2.6	1.5	2.1
Fishing	2.5	2.2	0.9	2.0



First Visit to Gulf Shores/Orange Beach	34.9%	37.4%	33.5%	37.8%
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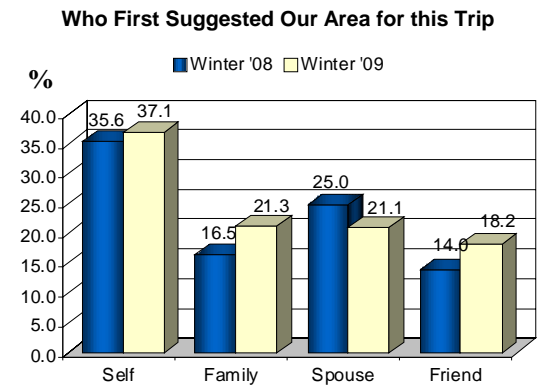
Winter 2009/10 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Average Repeat Visits to GSH/ORB over past 5 years (Base: Repeat Visitors)	4.5 trips	4.4 trips	4.1 trips	4.1 trips
Information Sources (Multiple Response)				
Internet	45.6%	49.5%	54.2%	60.6%
Previous Visit	56.7	49.2	56.9	52.4
Recommendation by Friend/Relative	28.0	29.0	26.3	30.2
Vacation/Travel Guides	15.9	17.8	15.0	15.8
Brochures	11.7	14.7	12.1	14.4
Convention and Visitors Bureau	10.2	8.6	7.6	8.2
Assisted by Travel Professional	3.5%	3.0%	3.0%	3.3%
Reservations				
Before Arriving in Area	89.1%	84.8%	71.4%	82.3%
None	10.9	15.2	28.6	17.7
	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Length of Stay in GSH/ORB (days)				
Vacation Trips	8.0	7.6	7.1	7.7
Get-away Trips	2.9	3.1	3.2	3.2
Party Size (Immediate Travel Party)	2.9	3.0	3.0	3.1
Party Composition (Multiple Response)				
Couple	55.3%	54.4%	64.2%	61.2%
Family	32.7	33.4	26.7	27.5
Group of Couples/Friends	8.9	11.4	8.5	10.8
Single	3.3	3.2	2.5	2.8
Traveling with Children				
Yes	28.4%	27.5%	20.6%	23.8%
No	71.6	72.5	79.4	76.2

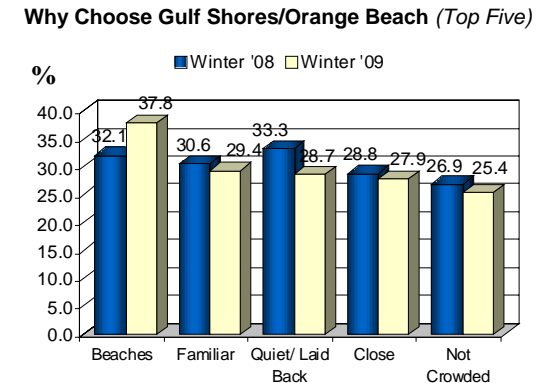


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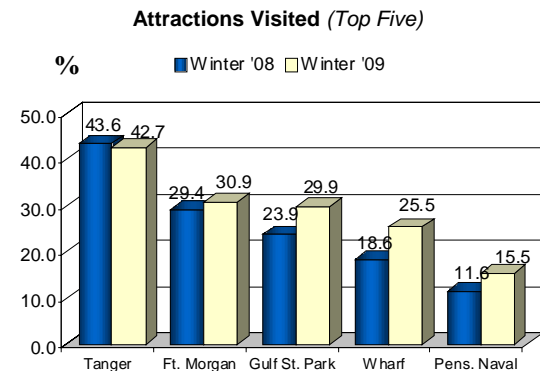
	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Who First Suggested Our Area for this Trip (Multiple Response)				
Self	38.1%	38.7%	35.6%	37.1%
Family	21.1	23.1	16.5	21.3
Spouse/Companion	18.4	16.0	25.0	21.1
Friend	19.9	18.5	14.0	18.2
% Female Suggesting	52.9%	52.5%	53.1%	52.5%



	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Other Beach Areas Considered (Multiple Response)				
None	52.8%	43.2%	49.9%	44.3%
Florida	42.2	47.7	44.0	47.1
South Carolina	4.0	7.8	9.2	9.0
Mississippi	8.0	9.6	7.6	8.7
Texas	3.4	6.7	6.8	6.5



	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Why Choose GSH/ORB (Multiple Response)				
Nice Beaches	30.2%	31.3%	32.1%	37.8%
Familiar/Previous Visit	26.4	26.0	30.6	29.4
Quiet/Laid Back	21.2	29.5	33.3	28.7
Close to Home	21.8	27.3	28.8	27.9
Not Crowded/Commercial	20.6	24.9	26.9	25.4
Weather	14.9	15.5	22.3	24.2
Recommended by Friend/Relative	18.0	21.1	18.2	22.9
Reasonable Rates	19.1	17.6	20.2	22.8
Accommodations	18.8	22.1	19.7	22.6
Safe Area	16.9	19.4	20.9	22.0
Beautiful	13.2	18.1	19.8	21.6
Food/Restaurants	16.2	20.0	21.6	19.5
Never Been	13.9	17.3	18.1	16.9
Family Oriented	10.7	14.1	13.9	15.1
Friends/Relatives in Area	10.9	12.9	11.6	12.6
Nature	8.0	12.5	13.5	11.9
Golfing	10.1	11.9	13.2	10.7



	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Attractions Visited (Multiple Response)				
Tanger Center	45.8%	47.0%	43.6%	42.7%
Fort Morgan	32.4	35.0	29.4	30.9
Gulf State Park	26.4	27.1	23.9	29.9
The Wharf	13.4	17.5	18.6	25.5
Pensacola Naval Museum	13.0	14.4	11.6	15.5
Battleship USS Alabama	11.3	14.7	10.9	14.1
Dauphin Island	12.6	15.4	11.7	13.0
Mobile Bay Ferry	11.4	14.1	12.2	12.4
The Track	7.3	9.5	6.4	10.6
Bon Secour Wildlife Refuge	11.6	14.8	13.7	10.2
None	18.7	15.8	15.5	17.1

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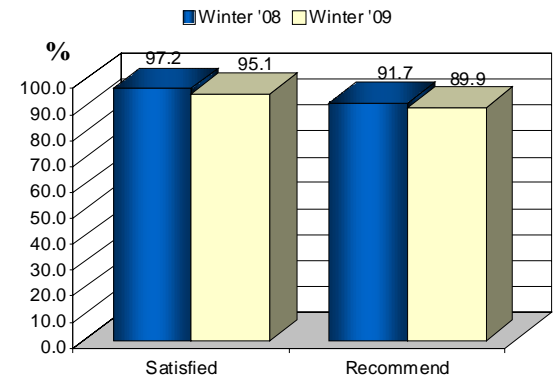
	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Satisfaction with GSH/ORB				
Very Satisfied	76.3%	73.1%	76.3%	71.5%
Satisfied	16.9	21.6	20.9	23.6
Satisfaction Level	93.2%	94.7%	97.2%	95.1%

Activities Enjoyed in GSH/ORB

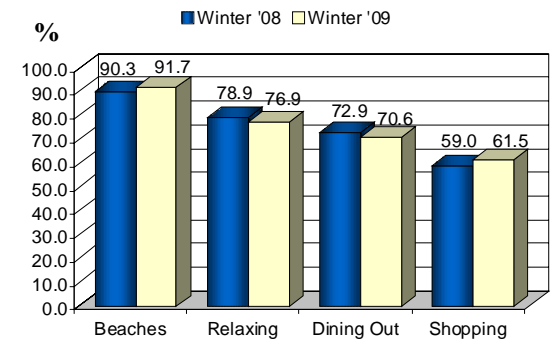
(Multiple Response)

Beaches	85.4%	89.6%	90.3%	91.7%
Relaxing	82.2	82.6	78.9	76.9
Dining Out	82.1	79.6	72.9	70.6
Shopping	60.0	62.7	59.0	61.5
Sight Seeing	58.4	63.5	61.0	57.5
Attractions	26.9	29.6	24.6	28.6
Wildlife/Environment	20.6	24.3	21.2	23.3
Pool	22.1	26.2	19.4	22.5
Visiting Friends/Relatives	18.0	15.8	17.3	20.6
Golfing	17.4	19.8	17.8	18.8
Photography	14.6	16.1	12.1	17.3
Fishing	15.6	17.9	15.7	17.1
Seafood/Shrimp Fest	14.7	15.6	12.7	13.4
Bars/Night Life	6.8	10.2	9.2	10.8
Miniature Golf	10.4	9.0	7.2	9.3
Cultural Events	8.6	8.2	8.0	9.2
Trip to Mississippi Casino	4.5	10.6	8.6	8.8
Bird Watching	9.1	8.1	7.5	8.3
Movies	9.1	8.6	7.7	8.0

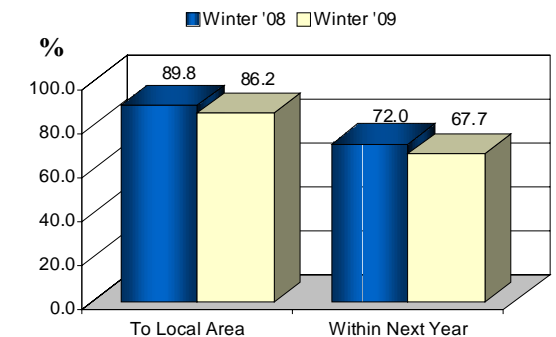
Satisfaction/Recommend Gulf Shores/Orange Beach



Activities Enjoyed (Top Four)



Plan to Return



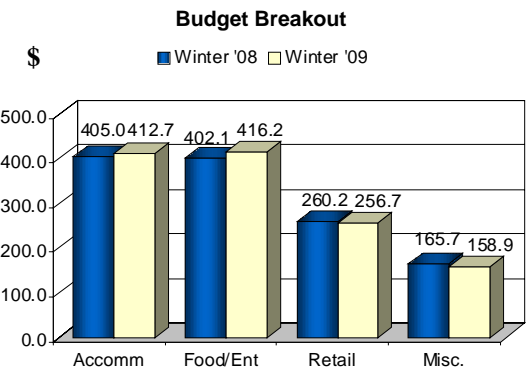
	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Recommend GSH/ORB to Friends/Relatives				
(% yes)	91.0%	90.6%	91.7%	89.9%
Plan to Return (% yes)				
To Local Area	84.0%	84.6%	89.8%	86.2%
Next Year (Base: Return to Local Area)	68.6	65.7	72.0	67.7
Median Age Head of Household (years)	55.1	54.8	53.4	52.8
Median Annual Household Income *	\$76,870	\$78,413	\$77,172	\$77,410

* Please Note: Median Household Income After Taxes

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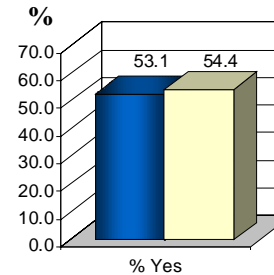
	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Visitor Party Budget (GSH/ORB Stay: Food/Lodging/Entertainment)				
Total	\$1,193.20	\$1,266.94	\$1,256.50	\$1,276.07
Per Person/Trip	411.45	422.31	418.83	411.64
Per Person/Day	70.94	74.09	72.21	69.77

	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Visitor Party Budget Breakout (GSH/ORB Stay)				
Accommodations	\$400.56	\$407.75	\$405.00	\$412.70
Food/Entertainment	390.15	407.81	402.13	416.15
Retail/Grocery	252.67	269.16	260.19	256.67
Miscellaneous Exp.	151.31	162.74	165.67	158.85

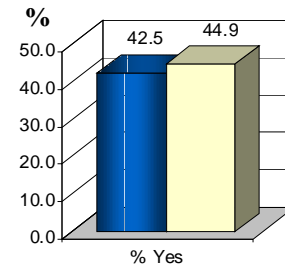


	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>Winter 2009</u>		
				<u>Total</u>	<u>First Time</u>	<u>Repeat</u>
See/Read/Hear GSH/ORB Beach Message	56.9%	56.6%	53.1%	54.4%	53.2%	55.0%
Type of Message Seen (Multiple Response)						
Internet	56.7%	62.2%	69.5%	73.1%	83.5%	67.0%
Brochure	27.0	31.3	27.7	25.1	22.0	26.9
Travel/Visitor Guide	14.3	17.2	17.8	19.0	20.7	17.9
Magazine Ad	22.2	19.6	14.4	15.3	12.8	16.8
Television	19.5	20.1	16.3	12.9	10.4	14.3
Magazine Story	10.1	11.1	8.0	11.1	11.6	10.8
Newspaper Ad	10.4	9.4	8.4	7.0	5.5	7.9
Newspaper Story	6.6	7.1	5.3	5.9	1.8	8.2

See/Hear/Read Message
■ Winter '08 ■ Winter '09

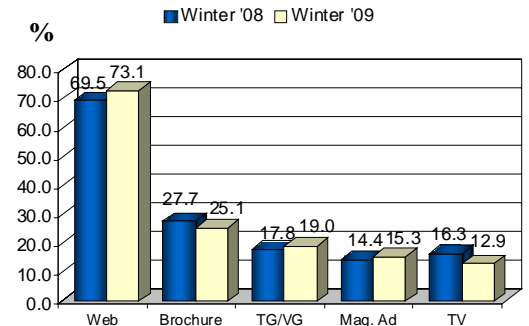


Influenced by Message
■ Winter '08 ■ Winter '09



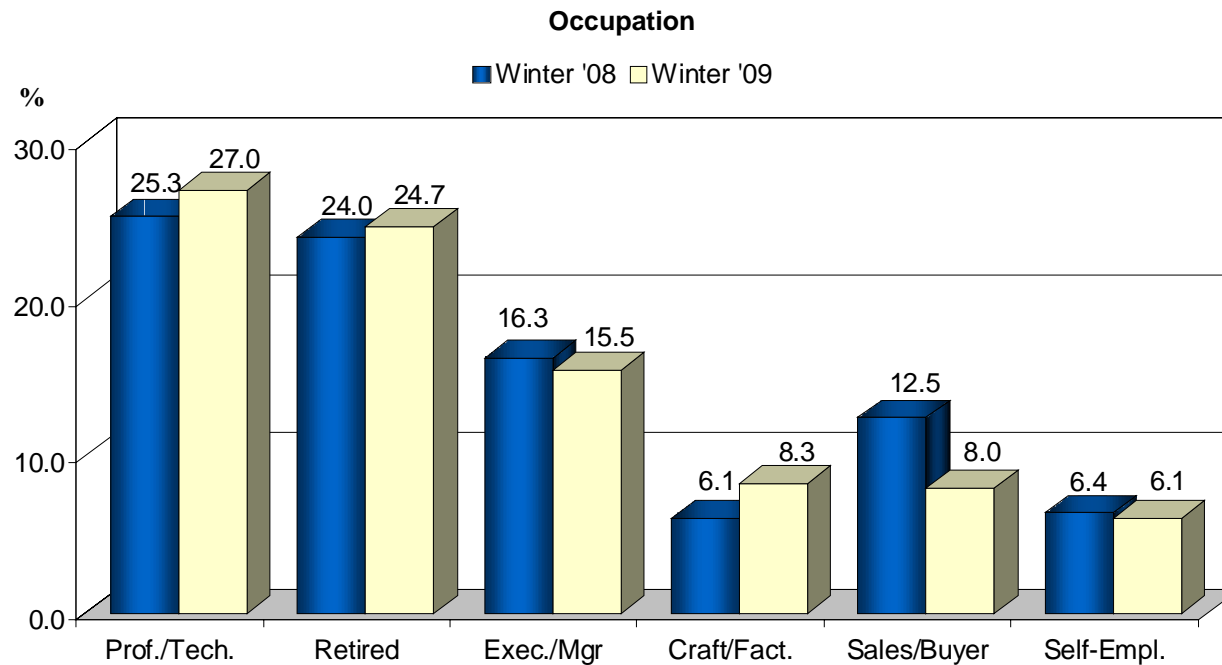
Influenced by GSH/ORB Message (Base: Respondents Reporting See/Read/Hear Message)	38.3%	40.4%	42.5%	44.9%	66.5%	32.3%
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Type of Message Seen (Top Five)
■ Winter '08 ■ Winter '09



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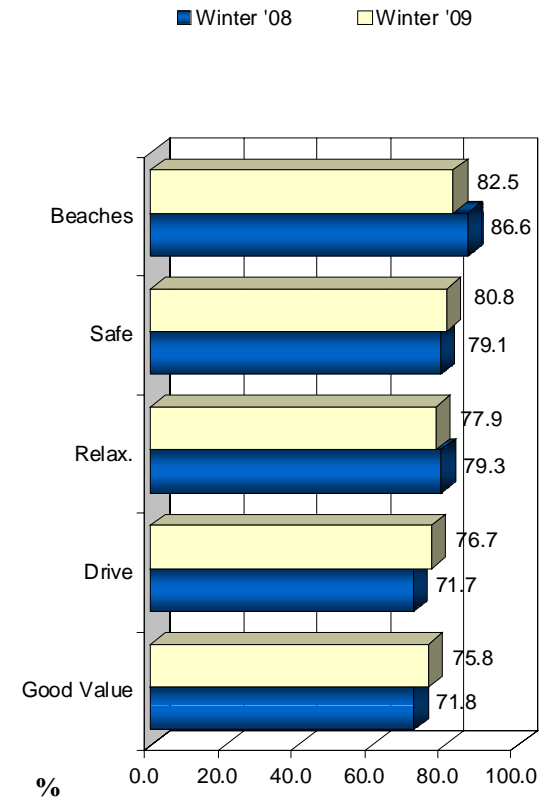
	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Occupation				
Professional/Technical	26.9%	28.5%	25.3%	27.0%
Retired	27.5	27.1	24.0	24.7
Executive/Managerial	15.3	12.8	16.3	15.5
Craft/Factory	10.1	9.3	6.1	8.3
Salesman/Buyer	4.2	5.5	12.5	8.0
Self-Employed	5.4	5.6	6.4	6.1



Influential Factors in Choosing Gulf Shores/Orange Beach

	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
White, Sandy Beaches	80.9%	82.6%	86.6%	82.5%
Safe Destination	80.2	81.6	79.1	80.8
Complete Relaxation	78.1	80.4	79.3	77.9
I Can Drive There With My Family	80.8	76.9	71.7	76.7
Good Value for the Money	75.0	72.6	71.8	75.8
Reasonably Priced Lodging	74.3	70.4	67.7	74.0
Warm Weather	67.5	73.4	75.5	72.4
Good Family Restaurants	69.9	71.8	68.6	69.7
Clean, Unspoiled Environment	63.6	69.0	72.5	69.2
Family Atmosphere	62.0	61.1	57.1	63.8
Uncommercialized Beaches	53.8	50.1	52.8	54.7
Upscale Accommodations	55.8	55.2	51.8	51.2
Sunning on the Beach	47.6	49.9	46.6	47.2
Safe Beaches for Children	46.6	43.4	40.3	44.7
Shopping	37.1	39.2	37.8	40.2
Romantic Place	32.4	34.3	35.5	37.5
Good Golfing	19.5	20.8	24.9	22.0
Good Fishing	15.2	17.0	15.9	15.2
Good Boating	14.3	15.4	17.6	14.9

Influential Factors (Top Five)



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	<u>2008</u>	<u>2009</u>
Requested Additional Information		
About Area for Trip (Multiple Response)		
Did not request information	33.5%	31.0%
Accessed individual hotel/motel/condominium website	32.4	31.9
Accessed www.gulfshores.com	30.8	31.4
Accessed destination sites for Gulf Shores/Orange Beach	23.5	21.6
Accessed an Internet travel website	14.4	16.7
Called a hotel/motel/condominium toll-free number	7.7	8.7
Called the CVB toll-free number	5.2	6.3
<hr/>		
Have Access to the Internet	94.0%	95.3%
Seek Out Travel Information On-Line		
<i>(BASE: Those with Internet Access)</i>	93.5%	92.4%
Ever Book Reservations On-Line		
<i>(BASE: Those with Internet Access)</i>	73.7%	75.4%
Used the Internet to Gather Travel Information for this Trip		
<i>(BASE: Those who Seek Travel Information On-Line)</i>	82.6%	85.0%
First Time	91.4%	92.6%
Repeat	77.9	80.0
<hr/>		
Booked Reservations for this Trip on the Internet		
<i>(BASE: Those who Seek Travel Information On-Line)</i>	38.8%	45.0%
Accessed the Website www.gulfshores.com		
<i>(BASE: Those who Seek Travel Information On-Line)</i>	48.8%	50.6%
<hr/>		
Sources of Information about Destination Once Arrive in Area		
<i>(Multiple Response)</i>		
Front desk personnel	33.0%	36.0%
Visitor guides	23.7	23.7
Visitor welcome centers	19.2	20.0
Internet	17.7	17.5
Maps	15.6	17.3
Waiters/waitresses	16.9	16.7
Local information TV channel	18.0	16.3
Don't look for information once in area	16.6	18.0

Planning/Reservation Window Analysis Days to Arrival

