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Winter 2010/11 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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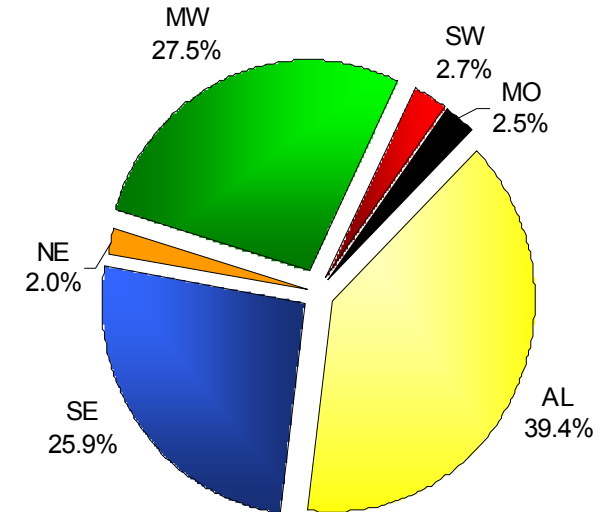
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June 2011

Winter 2010/11 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

	Winter '07	Winter '08	Winter '09	Winter '10	'09-'10 % Δ
Number of Visitors	249,900	230,200	232,000	241,900	+4.3
Visitor Expenditures	\$105,535,269	\$96,414,700	\$95,500,480	\$102,739,800	+7.6

2010 Regional Distribution of Visitors



Regional Visitor Distribution	Winter '07	Winter '08	Winter '09	Winter '10
Alabama	31.8%	32.8%	34.0%	39.4%
Southeast	21.9	21.3	24.9	25.9
Northeast	3.0	2.1	2.2	2.0
Midwest	37.3	38.4	32.8	27.5
Southwest	3.3	3.0	3.3	2.7
Markets of Opportunity	2.7	2.4	2.8	2.5
Total	100.0%	100.0%	100.0%	100.0%

	Winter 2007		Winter 2008		Winter 2009		Winter 2010	
	Occ.	Rm. Nights	Occ.	Rm. Nights	Occ.	Rm. Nights	Occ.	Rm. Nights
Lodging Occupancy	16.9%	89,020	14.8%	81,327	17.1%	87,471	16.4%	92,279
Condominium Market	16.9%	89,020	14.8%	81,327	17.1%	87,471	16.4%	92,279
Hotel/Motel Market	35.0	70,259	29.2	68,468	26.3	61,668	28.5	66,416

Average Daily Rate	Winter 2007	Winter 2008	Winter 2009	Winter 2010
	Condominium Market	\$64.91	\$64.06	\$68.01
Hotel/Motel Market	82.31	76.69	72.69	80.47

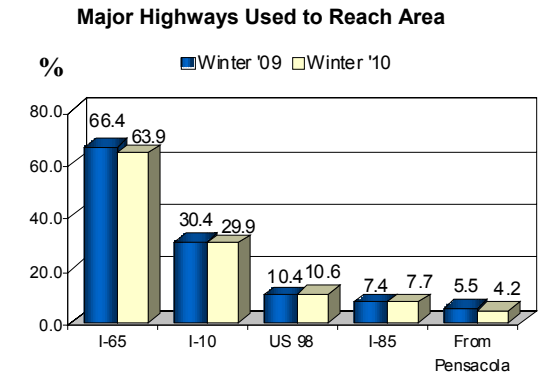
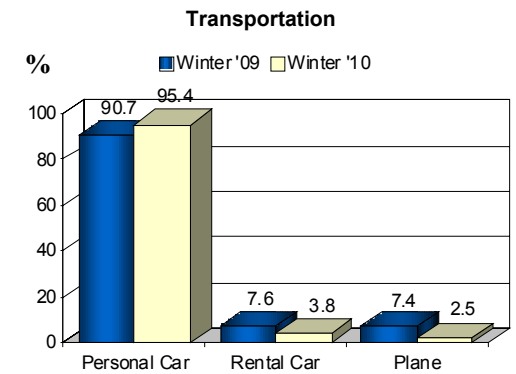
TOP U.S. FEEDER MARKETS

Core Origin Markets		Winter 2007/'08		Winter 2008/'09		Winter 2009/'10		Winter 2010/'11
'09 Rank		%	'07 Rank	%	'08 Rank	%	'09 Rank	%
1.	Birmingham	16.1%	1	17.1%	1	16.5%	1	19.1%
2.	Mobile/Pensacola (excluding Baldwin County)	**	**	**	**	4.6	3	7.5
3.	Huntsville/Decatur	6.1	2	6.9	2	6.1	2	5.4
4.	Montgomery/Selma	4.9	3	6.0	3	4.5	4	4.1
5.	New Orleans	**	**	**	**	3.0	7	3.6
6.	Atlanta	4.0	5	3.4	6	3.1	6	3.3
7.	Nashville	4.4	4	4.0	4	3.5	5	3.1
8.	Jackson, MS	**	**	**	**	**	**	2.7
9.	Baton Rouge	2.8	10	**	**	**	**	2.6
10.	Chattanooga	**	**	**	**	**	**	2.2

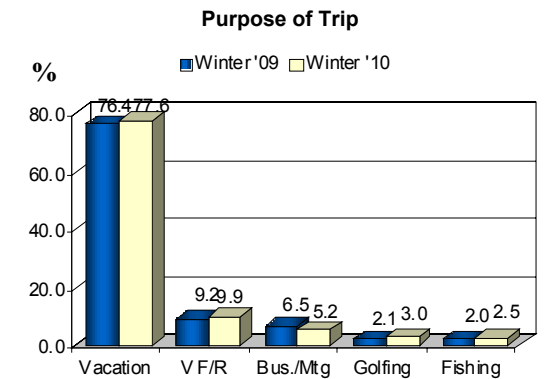
** Please Note: Not in Top Ten Listing

Winter 2010/11 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
Transportation Mode (Multiple Response)				
Personal Car/RV	84.9%	91.3%	90.7%	95.4%
Rental Car	12.0	5.8	7.6	3.8
Plane	13.3	7.0	7.4	2.5
Major Highways Used to Reach Area (Multiple Response)				
Interstate 65	68.5%	70.6%	66.4%	63.9%
Interstate 10	21.9	28.2	30.4	29.9
U.S. Highway 98	8.8	8.3	10.4	10.6
Interstate 85	7.8	6.6	7.4	7.7
From Pensacola	6.2	4.8	5.5	4.2



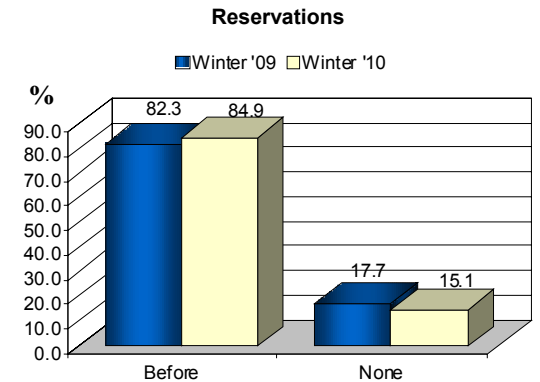
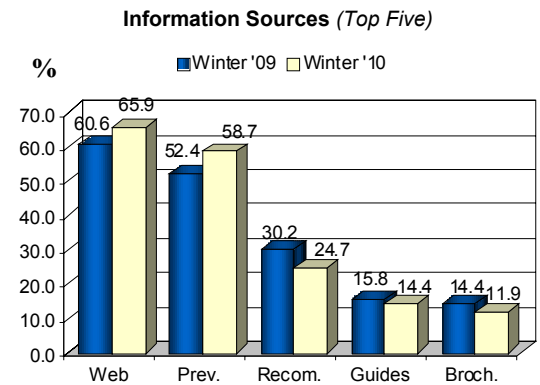
	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
Purpose of Trip (Primary Reason)				
Vacation	77.1%	78.4%	76.4%	77.6%
Visit Friends/Relatives	9.9	7.2	9.2	9.9
Business/Meeting/Conference	7.8	4.4	6.5	5.2
Golfing	2.6	1.5	2.1	3.0
Fishing	2.2	0.9	2.0	2.5



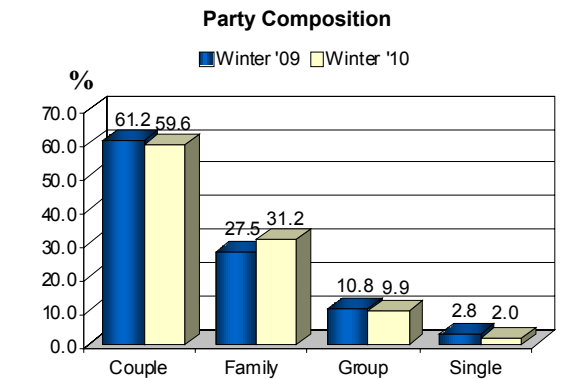
	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
First Visit to Gulf Shores/Orange Beach	37.4%	33.5%	37.8%	33.5%

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	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
Average Repeat Visits to GSH/ORB over past 5 years (Base: Repeat Visitors)	4.4 trips	4.1 trips	4.1 trips	4.4 trips
Information Sources (Multiple Response)				
Internet	49.5%	54.2%	60.6%	65.9%
Previous Visit	49.2	56.9	52.4	58.7
Recommendation by Friend/Relative	29.0	26.3	30.2	24.7
Vacation/Travel Guides	17.8	15.0	15.8	14.4
Brochures	14.7	12.1	14.4	11.9
Convention and Visitors Bureau	8.6	7.6	8.2	9.8
Assisted by Travel Professional	3.0%	3.0%	3.3%	3.5%
Reservations				
Before Arriving in Area	84.8%	71.4%	82.3%	84.9%
None	15.2	28.6	17.7	15.1

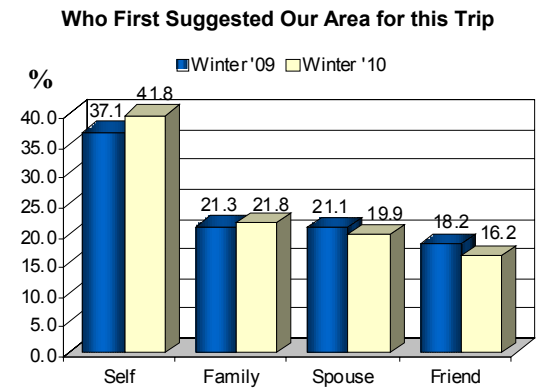


	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
Length of Stay in GSH/ORB (days)				
Vacation Trips	7.6	7.1	7.7	7.3
Get-away Trips	3.1	3.2	3.2	3.1
Party Size (Immediate Travel Party)	3.0	3.0	3.1	3.1
Party Composition (Multiple Response)				
Couple	54.4%	64.2%	61.2%	59.6%
Family	33.4	26.7	27.5	31.2
Group of Couples/Friends	11.4	8.5	10.8	9.9
Single	3.2	2.5	2.8	2.0
Traveling with Children				
Yes	27.5%	20.6%	23.8%	24.0%
No	72.5	79.4	76.2	76.0

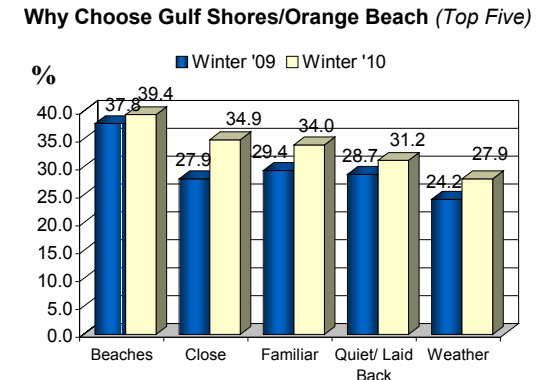


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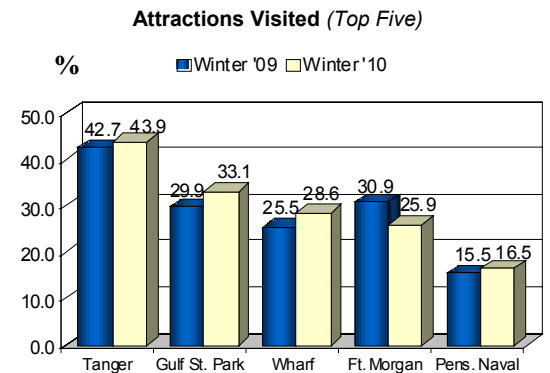
	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
Who First Suggested Our Area for this Trip (Multiple Response)				
Self	38.7%	35.6%	37.1%	41.8%
Family	23.1	16.5	21.3	21.8
Spouse/Companion	16.0	25.0	21.1	19.9
Friend	18.5	14.0	18.2	16.2
% Female Suggesting	52.5%	53.1%	52.5%	50.5%



Other Beach Areas Considered (Multiple Response)	2007	2008	2009	2010
None	43.2%	49.9%	44.3%	38.8%
Florida	47.7	44.0	47.1	52.3
South Carolina	7.8	9.2	9.0	12.4
Mississippi	9.6	7.6	8.7	6.0
Texas	6.7	6.8	6.5	4.9



Why Choose GSH/ORB (Multiple Response)	2007	2008	2009	2010
Nice Beaches	31.3%	32.1%	37.8%	39.4%
Close to Home	27.3	28.8	27.9	34.9
Familiar/Previous Visit	26.0	30.6	29.4	34.0
Quiet/Laid Back	29.5	33.3	28.7	31.2
Weather	15.5	22.3	24.2	27.9
Reasonable Rates	17.6	20.2	22.8	25.7
Safe Area	19.4	20.9	22.0	24.2
Accommodations	22.1	19.7	22.6	23.4
Food/Restaurants	20.0	21.6	19.5	23.1
Not Crowded/Commercial	24.9	26.9	25.4	22.2
Beautiful	18.1	19.8	21.6	20.7
Recommended by Friend/Relative	21.1	18.2	22.9	18.9
Family Oriented	14.1	13.9	15.1	15.8
Golfing	11.9	13.2	10.7	14.4
Nature	12.5	13.5	11.9	13.1
Friends/Relatives in Area	12.9	11.6	12.6	11.5
Never Been	17.3	18.1	16.9	10.8

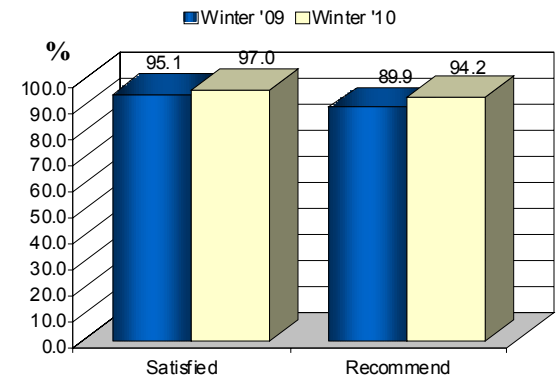


Attractions Visited (Multiple Response)	2007	2008	2009	2010
Tanger Center	47.0%	43.6%	42.7%	43.9%
Gulf State Park	27.1	23.9	29.9	33.1
The Wharf	17.5	18.6	25.5	28.6
Fort Morgan	35.0	29.4	30.9	25.9
Pensacola Naval Museum	14.4	11.6	15.5	16.5
Dauphin Island	15.4	11.7	13.0	15.3
Mobile Bay Ferry	14.1	12.2	12.4	13.8
Bon Secour Wildlife Refuge	14.8	13.7	10.2	12.8
Battleship USS Alabama	14.7	10.9	14.1	12.2
Alabama Gulf Coast Zoo	12.2	9.6	9.6	10.5
None	15.8	15.5	17.1	16.6

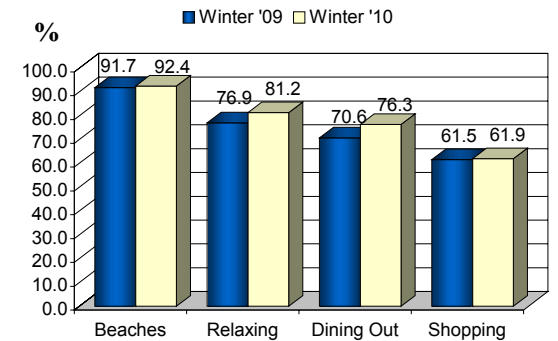
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	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
Satisfaction with GSH/ORB				
Very Satisfied	73.1%	76.3%	71.5%	72.9%
Satisfied	<u>21.6</u>	<u>20.9</u>	<u>23.6</u>	<u>24.1</u>
Satisfaction Level	94.7%	97.2%	95.1%	97.0%
Activities Enjoyed in GSH/ORB (Multiple Response)				
Beaches	89.6%	90.3%	91.7%	92.4%
Relaxing	82.6	78.9	76.9	81.2
Dining Out	79.6	72.9	70.6	76.3
Shopping	62.7	59.0	61.5	61.9
Sight Seeing	63.5	61.0	57.5	53.7
Attractions	29.6	24.6	28.6	26.7
Wildlife/Environment	24.3	21.2	23.3	26.6
Visiting with Friends/Relatives	15.8	17.3	20.6	22.1
Golfing	19.8	17.8	18.8	21.3
Pool	26.2	19.4	22.5	20.7
Photography	16.1	12.1	17.3	20.0
Fishing	17.9	15.7	17.1	19.4
Bars/Night Life	10.2	9.2	10.8	12.9
Cultural Events	8.2	8.0	9.2	11.2
Miniature Golf	9.0	7.2	9.3	10.5
Trip to Mississippi Casino	10.6	8.6	8.8	10.1
Seafood/Shrimp Fest	15.6	12.7	13.4	9.8
Bird Watching	8.1	7.5	8.3	8.9
Movies	8.6	7.7	8.0	7.6

Satisfaction/Recommend Gulf Shores/Orange Beach

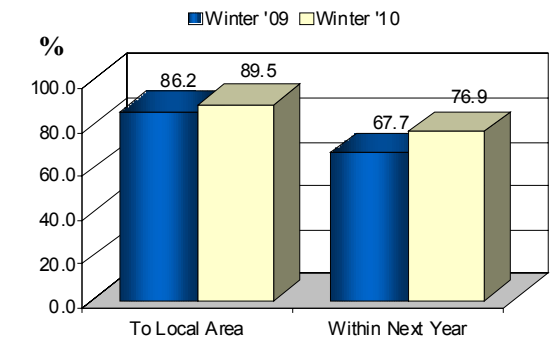


Activities Enjoyed (Top Four)



	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
Recommend GSH/ORB to Friends/Relatives (% yes)				
	90.6%	91.7%	89.9%	94.2%
Plan to Return (% yes)				
To Local Area	84.6%	89.8%	86.2%	89.5%
Next Year (Base: Return to Local Area)	65.7	72.0	67.7	76.9
Median Age Head of Household (years)	54.8	53.4	52.8	49.6
Median Annual Household Income *	\$78,413	\$77,172	\$77,410	\$72,410

Plan to Return

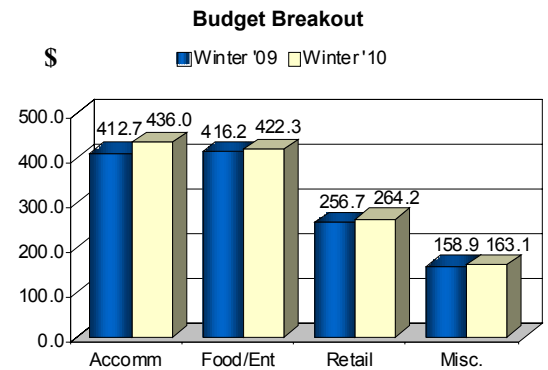


* Please Note: Median Household Income After Taxes

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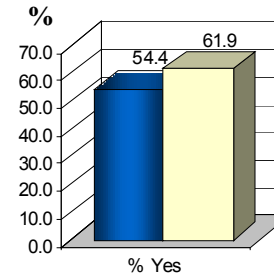
	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
Visitor Party Budget (GSH/ORB Stay: Food/Lodging/Entertainment)				
Total	\$1,266.94	\$1,256.50	\$1,276.07	\$1,316.62
Per Person/Trip	422.31	418.83	411.64	424.72
Per Person/Day	74.09	72.21	69.77	70.79

Visitor Party Budget Breakout (GSH/ORB Stay)	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
Accommodations	\$407.75	\$405.00	\$412.70	\$435.96
Food/Entertainment	407.81	402.13	416.15	422.33
Retail/Grocery	269.16	260.19	256.67	264.16
Miscellaneous Exp.	162.74	165.67	158.85	163.10

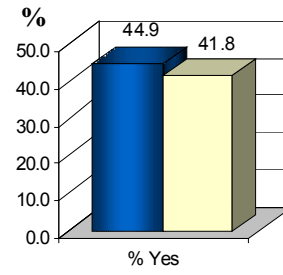


	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>Winter 2010</u>		
				<u>Total</u>	<u>First Time</u>	<u>Repeat</u>
See/Read/Hear GSH/ORB Beach Message	56.6%	53.1%	54.4%	61.9%	60.2%	62.7%
Type of Message Seen (Multiple Response)						
Internet	62.2%	69.5%	73.1%	78.5%	77.4%	79.9%
Brochure	31.3	27.7	25.1	18.6	40.9	7.9
Television	20.1	16.3	12.9	16.4	13.2	17.9
Travel/Visitor Guide	17.2	17.8	19.0	15.0	32.1	6.7
Newspaper Story	7.1	5.3	5.9	11.3	7.5	13.1
Magazine Ad	19.6	14.4	15.3	11.1	18.9	7.3
Magazine Story	11.1	8.0	11.1	9.4	14.5	7.0
Radio	N/A	1.0	2.5	6.1	6.3	6.1
Newspaper Ad	9.4	8.4	7.0	5.7	8.8	4.3

See/Hear/Read Message
Winter '09 Winter '10

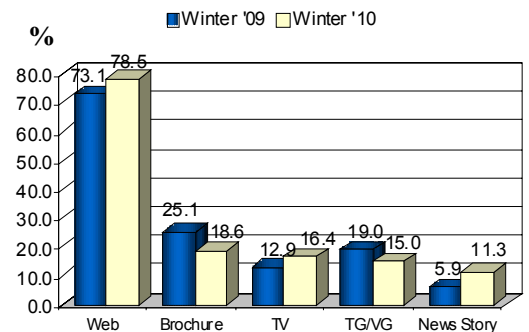


Influenced by Message
Winter '09 Winter '10



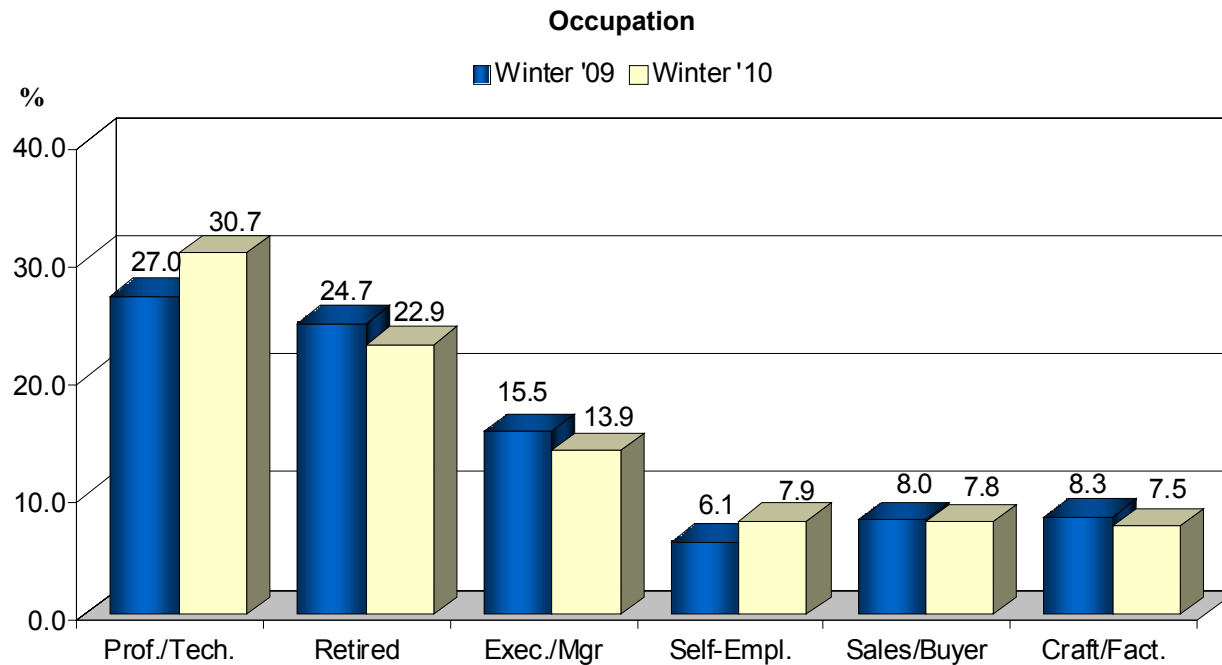
Influenced by GSH/ORB Message (Base: Respondents Reporting See/Read/Hear Message)	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
	40.4%	42.5%	44.9%	41.8%

Type of Message Seen (Top Five)
Winter '09 Winter '10



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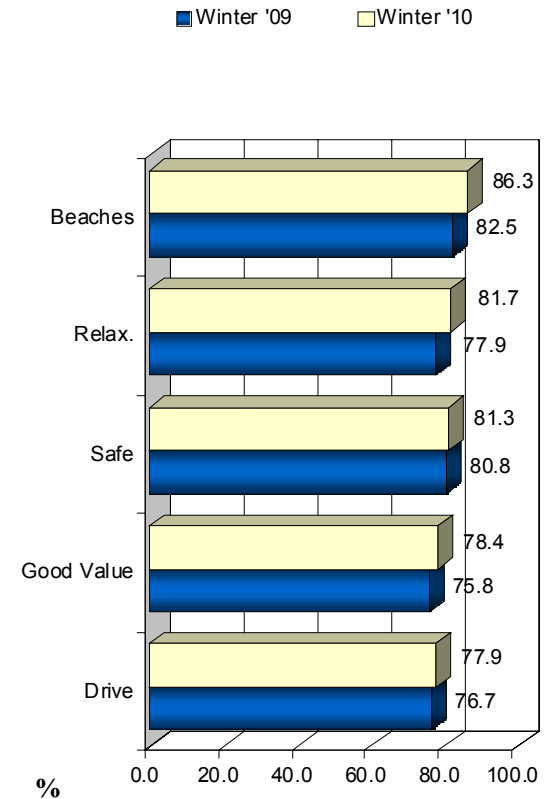
	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
Occupation				
Professional/Technical	28.5%	25.3%	27.0%	30.7%
Retired	27.1	24.0	24.7	22.9
Executive/Managerial	12.8	16.3	15.5	13.9
Self-Employed	5.6	6.4	6.1	7.9
Salesman/Buyer	5.5	12.5	8.0	7.8
Craft/Factory	9.3	6.1	8.3	7.5



Influential Factors in Choosing Gulf Shores/Orange Beach

	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
White, Sandy Beaches	82.6%	86.6%	82.5%	86.3%
Complete Relaxation	80.4	79.3	77.9	81.7
Safe Destination	81.6	79.1	80.8	81.3
Good Value for the Money	72.6	71.8	75.8	78.4
I Can Drive There With My Family	76.9	71.7	76.7	77.9
Reasonably Priced Lodging	70.4	67.7	74.0	75.1
Warm Weather	73.4	75.5	72.4	74.0
Good Restaurants/Dining Out	71.8	68.6	69.7	72.5
Clean, Unspoiled Environment	69.0	72.5	69.2	71.2
Family Atmosphere	61.1	57.1	63.8	65.5
Uncommercialized Beaches	50.1	52.8	54.7	60.6
Upscale Accommodations	55.2	51.8	51.2	49.4
Sunning on the Beach	49.9	46.6	47.2	48.8
Safe Beaches for Children	43.4	40.3	44.7	43.0
Shopping	39.2	37.8	40.2	41.6
Romantic Place	34.3	35.5	37.5	40.8
Good Golfing	20.8	24.9	22.0	24.2
Good Fishing	17.0	15.9	15.2	21.3
Good Boating	15.4	17.6	14.9	17.4

Influential Factors (Top Five)



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	<u>2009</u>	<u>2010</u>
Requested Additional Information		
About Area for Trip (Multiple Response)		
Did not request information	31.0%	28.4%
Accessed www.gulfshores.com	31.4	36.9
Accessed individual hotel/motel/condominium website	31.9	33.2
Accessed destination sites for Gulf Shores/Orange Beach	21.6	23.1
Accessed an Internet travel website	16.7	18.6
Called a hotel/motel/condominium toll-free number	8.7	7.4
Called the CVB toll-free number	6.3	5.3
<hr/>		
Have Access to the Internet	95.3%	95.6%
Seek Out Travel Information On-Line (BASE: Those with Internet Access)	92.4%	93.2%
Ever Book Reservations On-Line (BASE: Those with Internet Access)	75.4%	78.9%
Used the Internet to Gather Travel Information for this Trip		
(BASE: Those who Seek Travel Information On-Line)	85.0%	91.9%
First Time	92.6%	94.1%
Repeat	80.0	90.7
<hr/>		
Booked Reservations for this Trip on the Internet (BASE: Those who Seek Travel Information On-Line)	45.0%	53.1%
Accessed the Website www.gulfshores.com (BASE: Those who Seek Travel Information On-Line)	50.6%	56.8%
<hr/>		
Sources of Information about Destination Once Arrive in Area (Multiple Response)		
Front desk personnel	36.0%	35.2%
Visitor guides	23.7	21.9
Visitor welcome centers	20.0	20.9
Internet	17.5	19.5
Waiters/waitresses	16.7	18.8
Maps	17.3	18.6
Local information TV channel	16.3	16.9
SmartPhones/Navigation System	4.8	16.5
Don't look for information once in area	18.0	15.0

Planning/Reservation Window Analysis Days to Arrival

