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2007 - 2008 Visitor Profile Alabama Gulf Coast Convention & Visitors Bureau



Prepared for:

Alabama Gulf Coast Convention and Visitors Bureau

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www.KlagesGroup.com

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2007 - 2008 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

Regional Distribution of Visitors	Fall 2007	Winter 2007	Spring 2008	Summer 2008
Alabama	40.0%	31.8%	34.7%	35.1%
Southeast	38.9	21.9	37.7	49.9
Northeast	1.5	3.0	2.7	0.6
Midwest	11.4	37.3	19.6	10.5
Southwest	3.9	3.3	3.6	3.4
Markets of Opportunity	4.3	2.7	1.7	0.5
Total	100.0%	100.0%	100.0%	100.0%

Economic Impact Estimates	Fall 2007	Winter 2007	Spring 2008	Summer 2008
Occupancy Condominium Market	36.8%	16.9%	46.1%	68.6%
Occupancy Hotel/Motel Market	58.8%	35.0%	61.6%	76.4%
ADR Condominium Market	\$112.99	\$64.91	\$141.48	\$209.96
ADR Hotel/Motel Market	\$112.35	\$82.31	\$123.70	\$168.14

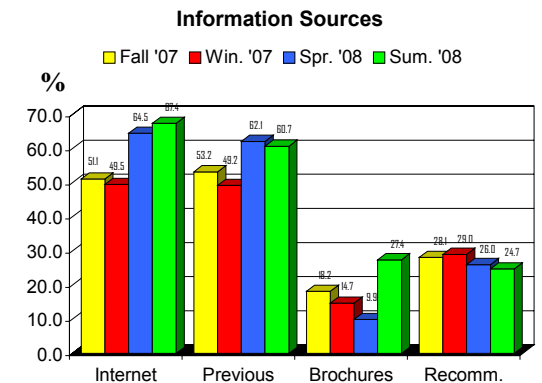
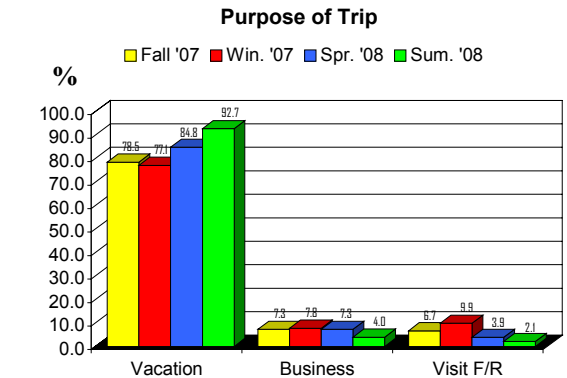
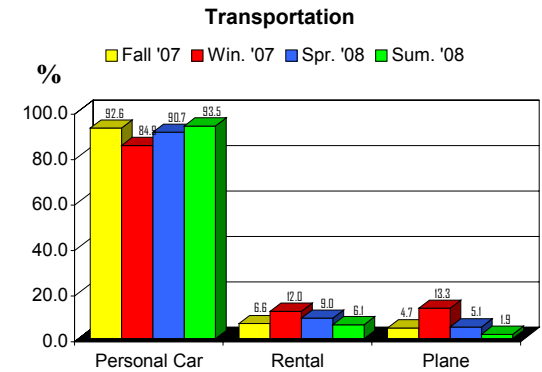
Top U.S. Feeder Markets (By Season)

Fall 2007		Winter 2007		Spring 2008		Summer 2008	
Core Origin Markets		Core Origin Markets		Core Origin Markets		Core Origin Markets	
1. Birmingham	20.3%	1. Birmingham	16.1%	1. Birmingham	12.0%	1. Birmingham	16.8%
2. Huntsville/Decatur	8.5	2. Huntsville/Decatur	6.1	2. Huntsville/Decatur	9.4	2. Huntsville/Decatur	11.0
3. Nashville	8.1	3. Montgomery/Selma	4.9	3. Nashville	7.1	3. Atlanta	7.4
4. Atlanta	5.2	4. Nashville	4.4	4. Montgomery/Selma	4.7	4. Nashville	7.1
5. Memphis	4.5	5. Atlanta	4.0	5. New Orleans	4.5	5. Memphis	6.1
6. Louisville	3.6	6. Detroit	3.9	6. Mobile/Pensacola	4.4	6. Montgomery	3.5
7. Baton Rouge	3.4	7. Minneapolis/St. Paul	3.7	7. Jackson, MS	4.2	7. New Orleans	3.2
8. Chattanooga	3.2	8. Memphis	3.4	8. Atlanta	4.0	8. Mobile	2.8
9. Tuscaloosa	3.0	9. Green Bay/Appleton	3.1	9. Anniston	3.0	9. Jackson, MS	2.6
10. Cincinnati	2.5	10. Baton Rouge	2.8	10. Baton Rouge	2.6	10. Baton Rouge	2.3
		11. Milwaukee	2.8				
Total	62.3%	Total	55.2%	Total	55.9%	Total	62.8%

	Fall '07 (Sept. – Oct.)	Winter '07 (Nov. - Feb.)	Spring '08 (Mar. - May)	Summer '08 (Jun. - Aug.)	Annual '07 – '08
Number of Visitors	310,720	249,900	267,100	555,380	1,383,100
Visitor Expenditures	\$108,111,917	\$105,535,269	\$115,977,491	\$243,689,636	\$573,314,313

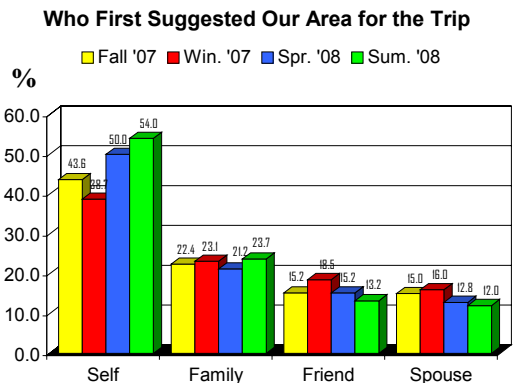
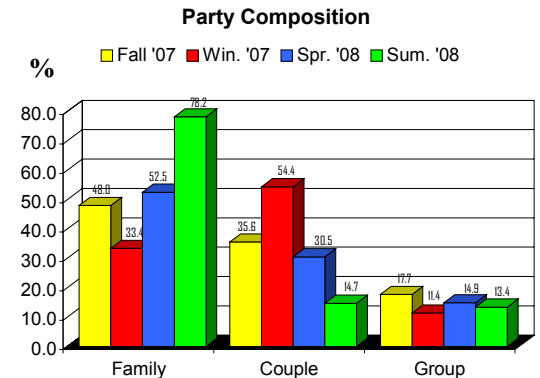
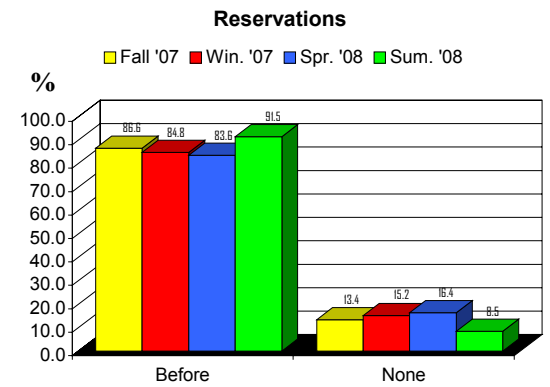
2007 - 2008 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

	<u>Fall '07</u>	<u>Winter '07</u>	<u>Spring '08</u>	<u>Summer '08</u>
Transportation Mode				
Personal Car	92.6%	84.9%	90.7%	93.5%
Rental Car	6.6	12.0	9.0	6.1
Plane	4.7	13.3	5.1	1.9
Major Highways Used to Reach Area (Multiple Response)				
Interstate 65	69.9%	68.5%	72.8%	68.3%
Interstate 10	30.9	21.9	25.2	31.1
U.S. Highway 98	7.2	8.8	17.1	16.8
Interstate 85	7.0	7.8	10.4	11.9
From Pensacola	3.9	6.2	4.0	1.8
Purpose of Trip (Primary Reason)				
Vacation	78.5%	77.1%	84.8%	92.7%
Business/Meeting/Conference	7.3	7.8	7.3	4.0
Visit Friends/Relatives	6.7	9.9	3.9	2.1
Fishing	2.1	2.2	0.9	0.7
Golfing	2.7	2.6	1.3	0.5
First Visit to GSH/ORB	36.3%	37.4%	29.9%	29.6%
Average Repeat Visits Past 5 Years (Base: Repeat Visitors)	4.0 trips	4.4 trips	4.2 trips	3.9 trips
Information Sources (Multiple Response)				
Internet	51.1%	49.5%	64.5%	67.4%
Previous Visit	53.2	49.2	62.1	60.7
Brochures	18.2	14.7	9.9	27.4
Recommendation by Friend/Relative	28.1	29.0	26.0	24.7
Vacation/Travel Guides	11.3	17.8	8.8	15.6
Convention and Visitors Bureau	6.7	8.6	5.7	7.1



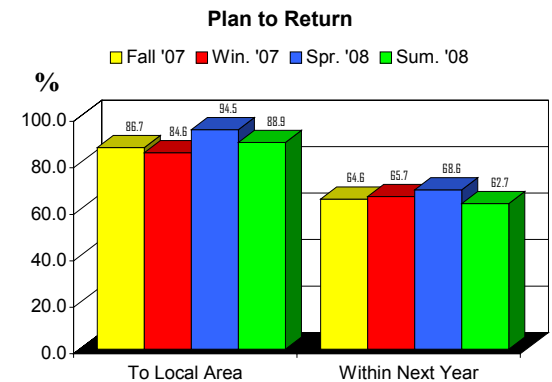
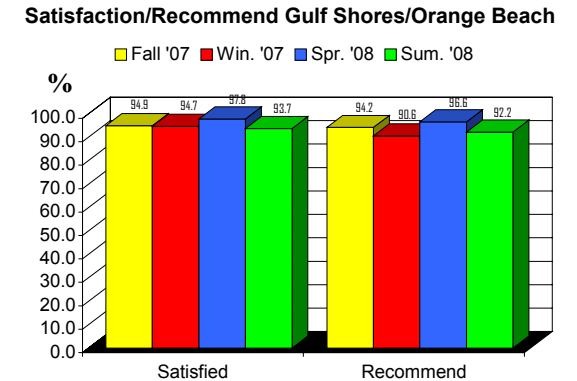
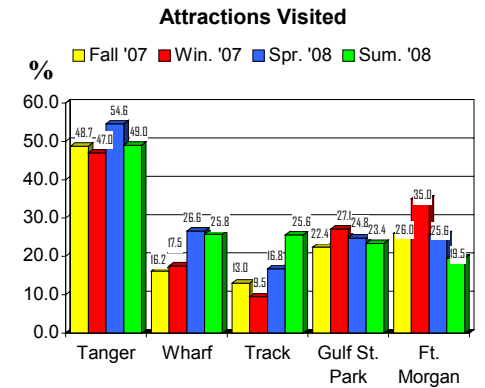
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	<u>Fall '07</u>	<u>Winter '07</u>	<u>Spring '08</u>	<u>Summer '08</u>
Assisted by Travel Agent	2.4%	3.0%	3.1%	2.1%
Reservations				
Before Arriving in Area	86.6%	84.8%	83.6%	91.5%
None	13.4	15.2	16.4	8.5
Length of Stay (days)				
Vacation Trips In GSH/ORB	6.5	7.6	6.8	6.5
Get-Away Trips In GSH/ORB	2.9	3.1	3.4	3.2
Party Size (Immediate Travel Party)	3.8	3.0	3.8	4.5
Party Composition				
Family	48.0%	33.4%	52.5%	78.2%
Couple	35.6	54.4	30.5	14.7
Group of Couples/Friends	17.7	11.4	14.9	13.4
Single	1.7	3.2	2.0	1.7
With Business Associates	2.3	1.8	2.9	1.5
Traveling with Children				
Yes	41.3%	27.5%	50.6%	77.0%
No	58.7	72.5	49.4	23.0
Who First Suggested Our Area for this Trip (Multiple Response)				
Self	43.6%	38.7%	50.0%	54.0%
Family	22.4	23.1	21.2	23.7
Friend	15.2	18.5	15.2	13.2
Spouse/Companion	15.0	16.0	12.8	12.0
% Female Recommending	68.6%	52.5%	64.1%	69.5%
Other Beach Areas Considered (Multiple Response)				
Florida	43.4%	47.7%	46.3%	58.1%
South Carolina	8.1	7.8	11.7	11.8
North Carolina	5.9	4.6	6.0	8.2
Georgia	6.7	4.7	3.0	5.8
Mississippi	8.7	9.6	4.1	5.0
Texas	4.0	6.7	2.6	4.9
None	49.1	43.2	47.9	33.6



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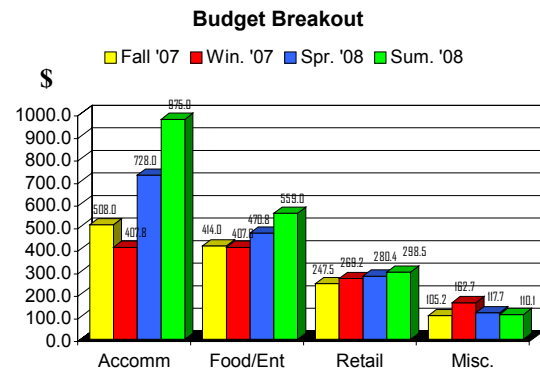
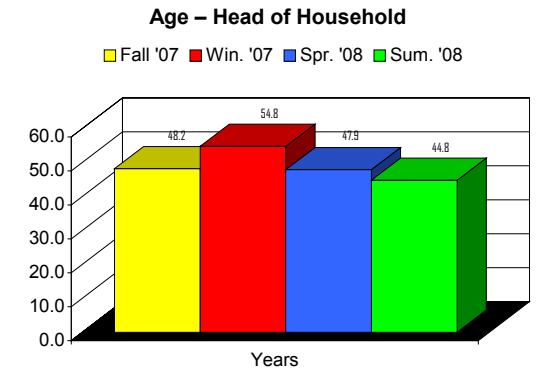
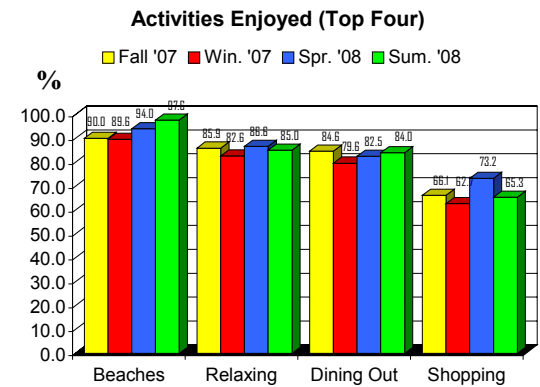
	<u>Fall '07</u>	<u>Winter '07</u>	<u>Spring '08</u>	<u>Summer '08</u>
Why Choose GSH/ORB (Multiple Response)				
Nice Beaches	33.9%	31.3%	48.9%	41.8%
Close to Home	37.6	27.3	37.5	38.3
Family Oriented	20.6	14.1	24.0	29.3
Familiar/Previous Visit	23.8	26.0	31.8	28.1
Recommended by Friend/Relative	17.6	21.1	23.2	22.3
Accommodations	21.8	22.1	12.8	19.8
Reasonable Rates	24.2	17.6	19.7	19.3
Quiet/Laid Back	16.1	29.5	28.7	18.2
Clean	9.3	9.3	7.2	17.4
Safety	22.8	19.4	25.8	16.7
Never Been/Try Something Different	12.3	17.3	6.7	13.5
Not Crowded/Commercial	23.5	24.9	13.2	11.5
Food/Local Restaurants	17.8	20.0	17.7	10.3
Weather	21.5	15.5	16.2	9.3
Beautiful	13.1	18.1	8.0	8.9
Shopping	9.3	8.1	14.1	8.8
Nature	13.8	12.5	15.3	7.9
Fishing	11.3	9.8	11.2	7.0
Friends/Relatives in Area	8.1	12.9	7.4	6.0
Golfing	6.4	11.9	9.1	4.7
Attractions Visited (Multiple Response)				
Tanger Center (Riviera Centre)	48.7%	47.0%	54.6%	49.0%
The Wharf	16.2	17.5	26.6	25.8
The Track	13.0	9.5	16.8	25.6
Gulf State Park	22.4	27.1	24.8	23.4
Fort Morgan	26.0	35.0	25.6	19.5
Waterville	1.3	2.4	7.4	15.8
Alabama Gulf Coast Zoo	11.9	12.2	18.0	14.3
Battleship USS Alabama	15.0	14.7	11.5	11.1
Pensacola Naval Museum	12.1	14.4	14.3	10.4
Dauphin Island	13.2	15.4	10.3	8.6
Mobile Bay Ferry	8.5	14.1	14.5	7.5
Bon Secour Wildlife Refuge	9.8	14.8	11.7	5.3
Bellingrath Gardens	5.9	11.0	4.3	1.2
None	17.3	15.8	18.5	15.0
Satisfaction with Area				
Very Satisfied	71.3%	73.1%	75.3%	69.9%
Satisfied	23.6	21.6	22.0	23.8
Satisfaction Level	94.9%	94.7%	97.8%	93.7%



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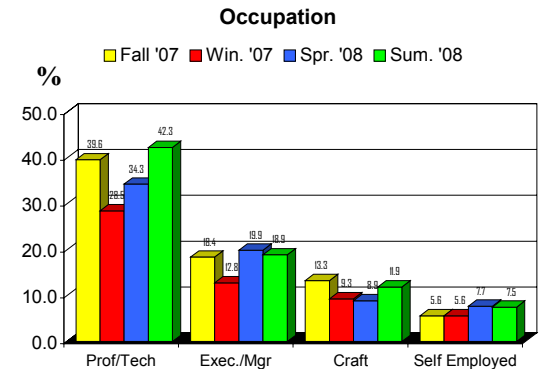
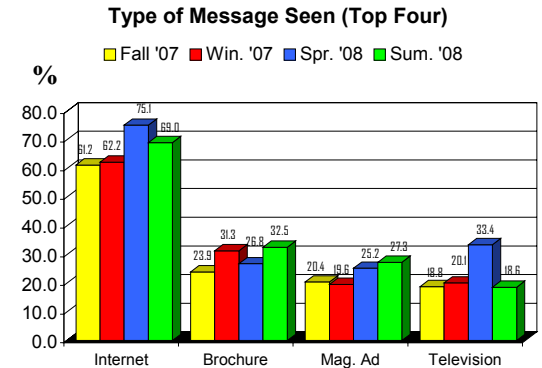
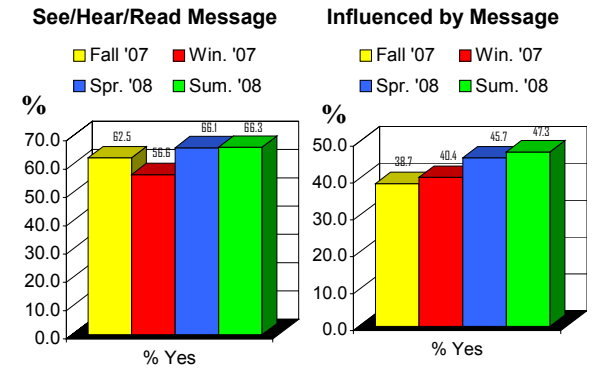
	Fall '07	Winter '07	Spring '08	Summer '08
Recommend Area to Friends	94.2%	90.6%	96.6%	92.2%
Plan to Return (% yes)				
To Local Area	86.7%	84.6%	94.5%	88.9%
Next Year (<i>Base: Return to Local Area</i>)	64.6	65.7	68.6	62.7
Activities Enjoyed in Area (Multiple Response)				
Beaches	90.0%	89.6%	94.0%	97.6%
Relaxing	85.9	82.6	86.6	85.0
Dining Out	84.6	79.6	82.5	84.0
Shopping	66.1	62.7	73.2	65.3
Pool	38.4	26.2	39.7	54.8
Sight Seeing	39.7	63.5	56.2	50.7
Attractions	30.8	29.6	44.3	41.1
Photography	18.6	16.1	21.3	25.9
Wildlife/Environment	17.8	24.3	26.5	24.4
Miniature Golf	12.9	9.0	17.0	19.7
Fishing	19.2	17.9	13.9	19.5
Visiting Friends/Relatives	12.8	15.8	18.1	14.4
Bars/Nightlife	10.5	10.2	13.5	13.7
Seafood/Shrimp Fest	17.7	15.6	12.5	11.0
Movies	7.3	8.6	10.2	10.4
Golfing	13.1	19.8	16.0	8.5
Bird Watching	2.4	8.1	11.6	4.3
Median Age Head of Household (years)	48.2	54.8	47.9	44.8
Median Annual Household Income*	\$71,056	\$78,413	\$78,547	\$85,588
Visitor Party Budget (GSH/ORB Stay: Food/Lodging/Entertainment)				
Total	\$1,322.18	\$1,266.94	\$1,650.01	\$1,974.49
Per Person/Trip	347.94	422.31	434.21	438.78
Per Person/Day	77.32	74.09	81.93	82.79
Visitor Party Budget Breakout (GSH/ORB Stay)				
Accommodations	\$508.00	\$407.75	\$727.96	\$975.00
Food/Entertainment	414.02	407.81	470.77	559.03
Retail/Grocery Purchases	247.47	269.16	280.40	298.54
Miscellaneous Expenditures	105.21	162.74	117.73	110.08

* Please Note: Median household income after taxes



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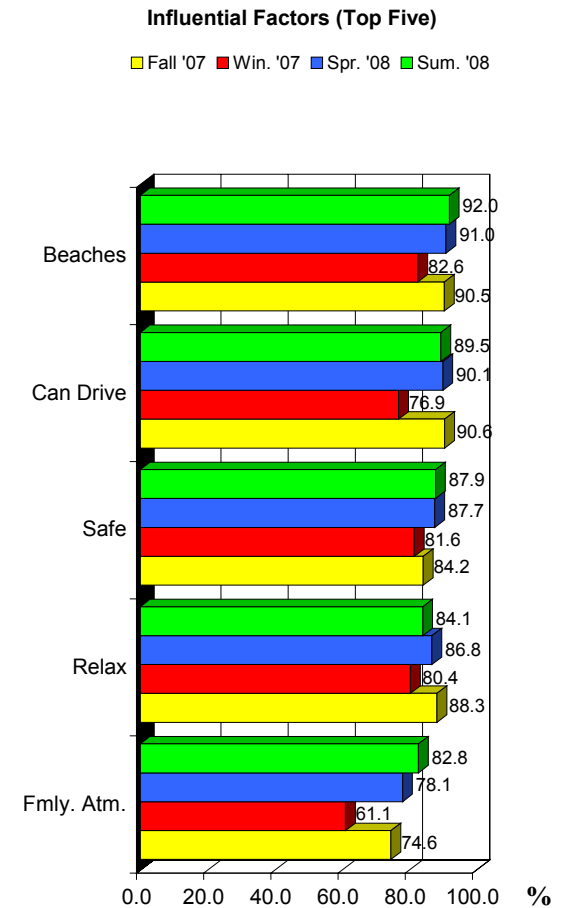
	Fall '07	Winter '07	Spring '08	Summer '08
See/Read/Hear GSH/ORB Message	62.5%	56.6%	66.1%	66.3%
Type of Message Seen				
Internet	61.2%	62.2%	75.1%	69.0%
Brochure	23.9	31.3	26.8	32.5
Magazine Ad	20.4	19.6	25.2	27.3
Television	18.8	20.1	33.4	18.6
Travel/Visitor Guide	19.7	17.2	15.6	17.7
Magazine Story	8.4	11.1	5.7	10.9
Newspaper Story	7.4	7.1	14.3	9.2
Newspaper Ad	5.3	9.4	15.3	8.2
Radio	5.4	3.7	4.3	7.0
Billboards	6.5	4.2	1.9	4.9
Influenced by GSH/ORB Message <i>(Base: Respondents Reporting See/Read/Hear Message)</i>	38.7%	40.4%	45.7%	47.3%
Likely or Very Likely to Combine a Gaming Trip to Mississippi w/a Future Stay at GS/OB	14.5%	17.3%	14.0%	13.8%
Occupation				
Professional/Technical	39.6%	28.5%	34.3%	42.3%
Executive/Managerial	18.4	12.8	19.9	18.9
Craft/Factory	13.3	9.3	8.9	11.9
Self-Employed	5.6	5.6	7.7	7.5
Retired	8.9	27.1	11.5	5.6
Salesman/Buyer	4.9	5.5	8.1	5.4



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Influential Factors in Choosing GSH/ORB

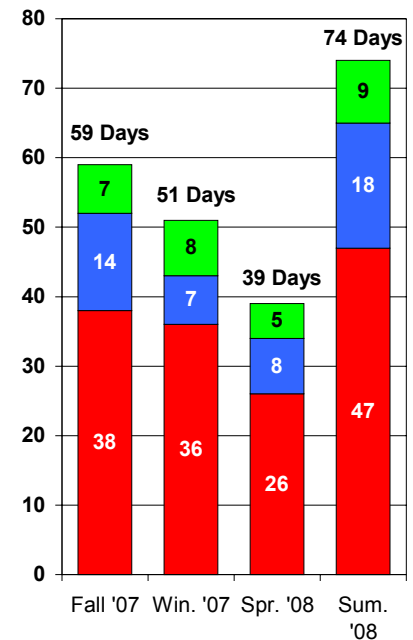
	<u>Fall '07</u>	<u>Winter '07</u>	<u>Spring '08</u>	<u>Summer '08</u>
White, Sandy Beaches	90.5%	82.6%	91.0%	92.0%
I Can Drive There with Family	90.6	76.9	90.1	89.5
Safe Destination	84.2	81.6	87.7	87.9
Complete Relaxation	88.3	80.4	86.8	84.1
Family Atmosphere	74.6	61.1	78.1	82.8
Sunning on the Beach	61.7	49.9	70.0	76.8
Good Value for the Money	84.3	72.6	78.3	76.7
Safe Beaches for Children	59.3	43.4	67.0	76.0
Clean, Unspoiled Environment	71.5	69.0	79.1	75.3
Reasonably Priced Lodging	74.9	70.4	75.2	74.5
Warm Weather	76.8	73.4	72.9	73.1
Good Family Restaurants	75.5	71.8	76.0	73.1
Uncommercialized Beaches	62.1	50.1	60.9	67.0
Upscale Accommodations	52.4	55.2	57.4	58.0
Romantic Place	40.0	34.3	36.7	34.9
Good Fishing	17.6	17.0	14.5	20.7
Good Golfing	13.3	20.8	15.4	16.6
Good Boating	11.8	15.4	11.0	12.4



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	<u>Fall '07</u>	<u>Winter '07</u>	<u>Spring '08</u>	<u>Summer '08</u>
Requested Additional Information				
About Area for Trip (Multiple Response)				
Did Not Request Information	38.6%	29.6%	35.5%	40.8%
Accessed www.gulfshores.com	28.1	28.9	39.5	37.2
Accessed Individual Hotel/Motel/Condominium Website	25.6	25.6	22.0	32.5
Accessed Destination Sites for Gulf Shores/Orange Beach	21.5	22.5	19.2	22.6
Accessed an On-Line Travel Agency Website	13.7	15.6	14.2	12.1
Called a Hotel/Motel/Condominium Toll-Free Number	8.3	11.1	6.8	10.7
Called the CVB Toll-Free Number	2.8	8.0	5.1	3.9
<hr/>				
Have Access to the Internet	92.1%	89.5%	94.1%	98.9%
Seek Out Travel Information On-Line (BASE: Those with Internet Access)	92.5%	92.0%	94.6%	93.2%
Ever Book Reservations On-Line (BASE: Those with Internet Access)	71.5%	71.1%	76.1%	77.2%
Used the Internet to Gather Travel Information for this Trip				
(BASE: Those who Seek Travel Information On-Line)	86.3%	83.7%	88.1%	91.5%
First Time	98.4	95.3	94.8	97.4
Repeat	78.6	76.0	84.8	89.2
Booked Reservations for this Trip on the Internet (BASE: Those who Seek Travel Information On-Line)				
	41.4%	37.2%	42.0%	48.5%
Accessed the Website www.gulfshores.com (BASE: Those who Seek Travel Information On-Line)				
	41.8%	45.7%	59.6%	49.7%
Sources of Information About Destination Once Arrive in Area (Multiple Response)				
Front Desk Personnel	29.9%	37.0%	33.5%	35.5%
Visitor Guides	29.1	19.4	26.2	31.6
Local Information TV Channel	13.2	19.6	25.6	17.7
Visitor Welcome Centers	17.8	18.7	21.2	17.0
Internet	11.1	13.0	16.3	16.2
Maps	17.7	14.7	15.3	15.5
Waiters/Waitresses	16.8	18.4	17.2	15.1
Local Radio	2.9	2.7	4.7	5.7
Don't Look for Information Once in Area	39.4	18.2	31.3	32.4

Planning/Reservation Window Analysis
Days to Arrival



■ Reservation ■ Decide ■ Start Talking Total