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2010 - 2011 Visitor Profile Alabama Gulf Coast Convention & Visitors Bureau



Prepared for:

Alabama Gulf Coast Convention and Visitors Bureau

Prepared by:

Evans - Klages, Inc.
www.KlagesGroup.com

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2010 - 2011 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

Regional Distribution of Visitors	Fall 2010	Winter 2010	Spring 2011	Summer 2011
Alabama	44.6%	39.4%	37.2%	35.5%
Southeast	39.7	25.9	41.0	46.1
Northeast	0.7	2.0	0.5	0.6
Midwest	8.6	27.5	14.1	8.8
Southwest	4.2	2.7	5.6	7.8
Markets of Opportunity	2.2	2.5	1.6	1.2
Total	100.0%	100.0%	100.0%	100.0%

Economic Impact Estimates	Fall 2010	Winter 2010	Spring 2011	Summer 2011
Occupancy Condominium Market	33.7%	16.4%	47.3%	69.2%
Occupancy Hotel/Motel Market	51.6%	28.5%	64.8%	78.6%
ADR Condominium Market	\$100.96	\$67.04	\$146.79	\$228.97
ADR Hotel/Motel Market	\$116.11	\$80.47	\$128.17	\$138.64

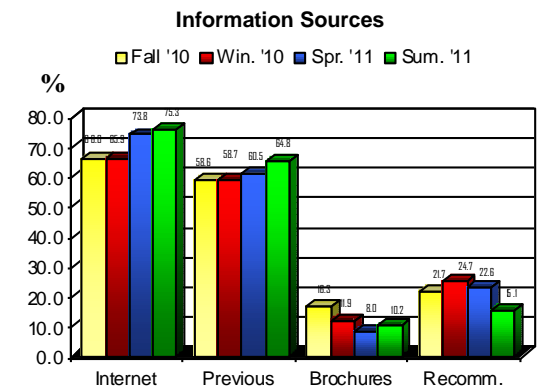
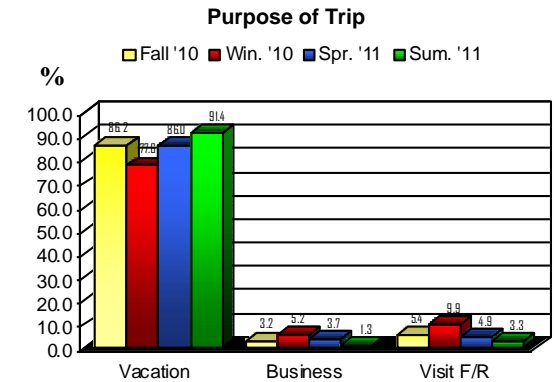
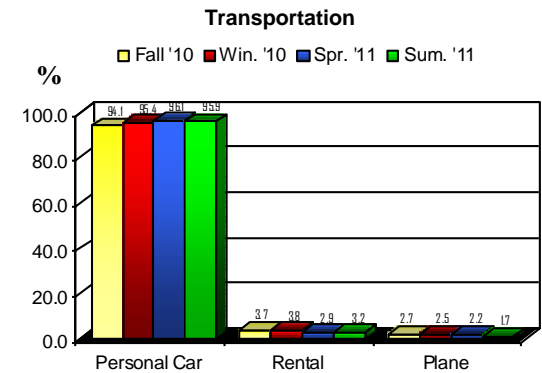
Top U.S. Feeder Markets (By Season)

Fall 2010		Winter 2010		Spring 2011		Summer 2011	
Core Origin Markets		Core Origin Markets		Core Origin Markets		Core Origin Markets	
1. Birmingham	23.1%	1. Birmingham	19.1%	1. Birmingham	18.1%	1. Birmingham	19.8%
2. Huntsville/Decatur	7.7	2. Mobile/Pensacola	7.5	2. Mobile/Pensacola	6.8	2. New Orleans	6.6
3. New Orleans	5.0	3. Huntsville/Decatur	5.4	3. Huntsville/Decatur	5.3	3. Huntsville/Decatur	6.4
4. Nashville	4.7	4. Montgomery/Selma	4.1	4. New Orleans	5.2	4. Nashville	5.2
5. Mobile/Pensacola	4.5	5. New Orleans	3.6	5. Montgomery/Selma	4.7	5. Mobile	4.3
6. Atlanta	3.7	6. Atlanta	3.3	6. Atlanta	4.4	6. Memphis	4.0
7. Montgomery/Selma	3.5	7. Nashville	3.1	7. Nashville	4.2	7. Montgomery	3.7
8. Baton Rouge	3.2	8. Jackson, MS	2.7	8. Baton Rouge	3.8	8. Baton Rouge	3.7
9. Jackson, MS	3.0	9. Baton Rouge	2.6	9. Jackson, MS	3.0	9. Jackson, MS	2.9
10. Memphis	2.5	10. Chattanooga	2.2	10. Columbus/Tupelo	2.4	10. Atlanta	2.8
						11. Lafayette, LA	2.8
Total	60.9%	Total	53.6%	Total	57.9%	Total	62.2%

	Fall '10 (Sept. – Oct.)	Winter '10 (Nov. - Feb.)	Spring '11 (Mar. - May)	Summer '11 (Jun. - Aug.)	Annual '10 – '11
Number of Visitors	278,000	241,900	275,900	593,600	1,389,400
Visitor Expenditures	\$99,065,300	\$102,739,800	\$119,089,500	\$284,144,400	\$605,039,000

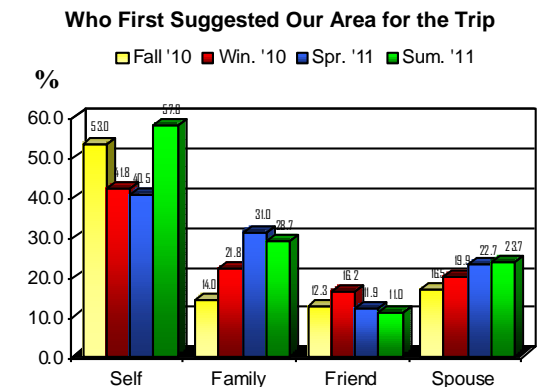
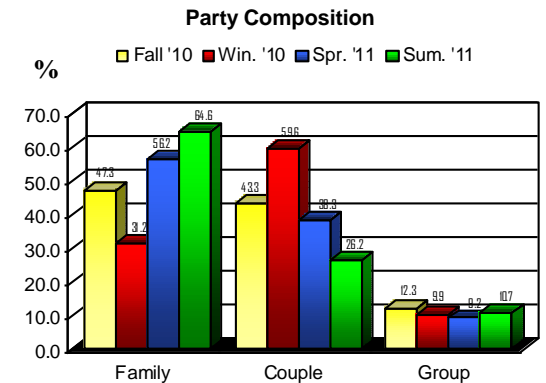
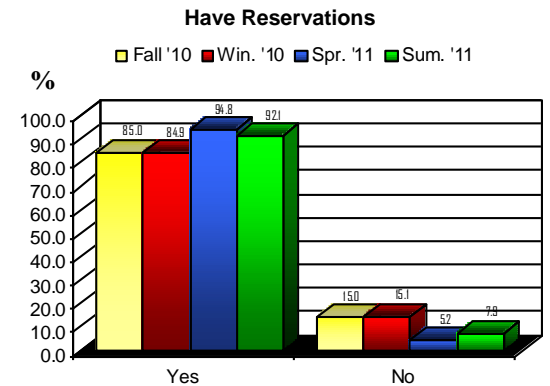
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	<u>Fall '10</u>	<u>Winter '10</u>	<u>Spring '11</u>	<u>Summer '11</u>
Transportation Mode				
Personal Car/RV	94.1%	95.4%	96.1%	95.9%
Rental Car	3.7	3.8	2.9	3.2
Plane	2.7	2.5	2.2	1.7
Major Highways Used to Reach Area (Multiple Response)				
Interstate 65	64.0%	63.9%	67.3%	60.7%
Interstate 10	32.5	29.9	33.2	36.1
U.S. Highway 98	8.4	10.6	10.9	7.5
Interstate 85	8.1	7.7	5.8	6.5
From Pensacola	3.9	4.2	3.2	2.8
Purpose of Trip (Primary Reason)				
Vacation	86.2%	77.6%	86.0%	91.4%
Business/Meeting/Conference	3.2	5.2	3.7	1.3
Visit Friends/Relatives	5.4	9.9	4.9	3.3
Fishing	1.7	2.5	1.5	1.3
Golfing	1.2	3.0	2.0	1.4
First Visit to GSH/ORB	32.8%	33.5%	26.6%	23.2%
Average Repeat Visits Past 5 Years (Base: Repeat Visitors)				
	4.8 trips	4.4 trips	4.1 trips	4.3 trips
Information Sources (Multiple Response)				
Internet	66.0%	65.9%	73.8%	75.3%
Previous Visit	58.6	58.7	60.5	64.8
Brochures	16.3	11.9	8.0	10.2
Recommendation by Friend/Relative	21.7	24.7	22.6	15.1
Vacation/Travel Guides	15.8	14.4	9.2	10.8
Convention and Visitors Bureau	8.9	9.8	5.3	4.6
Business	2.0	1.1	3.6	N/A
Television	1.2	1.0	1.1	3.9



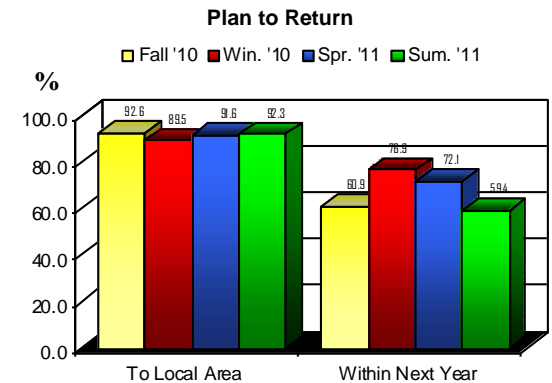
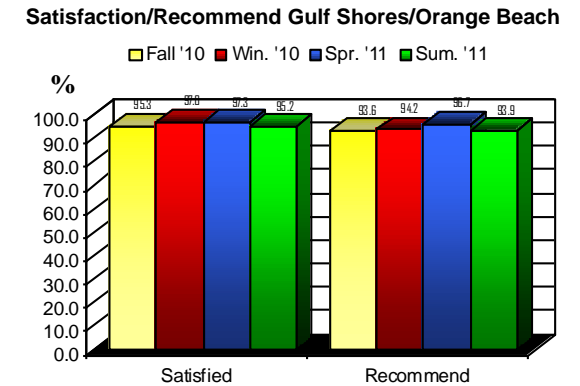
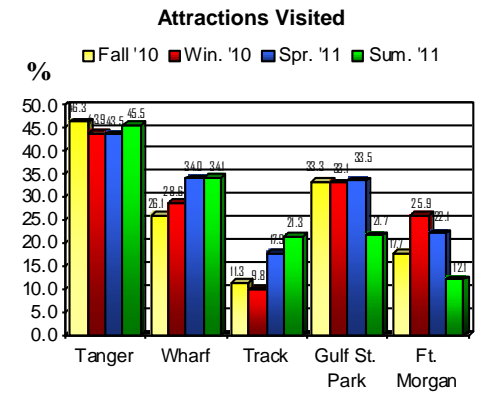
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	<u>Fall '10</u>	<u>Winter '10</u>	<u>Spring '11</u>	<u>Summer '11</u>
Assisted by Travel Professional	2.0%	3.5%	4.2%	4.2%
Have Reservations				
Yes	85.0%	84.9%	94.8%	92.1%
No	15.0	15.1	5.2	7.9
Length of Stay in GSH/ORB (days)				
Vacation Trips	6.6	7.3	7.0	6.4
Get-Away Trips	3.1	3.1	3.4	3.3
Party Size (Immediate Travel Party)	3.8	3.1	3.9	4.2
Party Composition				
Family	47.3%	31.2%	56.2%	64.6%
Couple	43.3	59.6	38.3	26.2
Group of Couples/Friends	12.3	9.9	9.2	10.7
Single	2.2	2.0	1.2	2.6
With Business Associates	1.2	0.4	0.2	0.7
Traveling with Children				
Yes	37.9%	24.0%	54.4%	60.9%
No	62.1	76.0	45.6	39.1
Who First Suggested Our Area for this Trip (Multiple Response)				
Self	53.0%	41.8%	40.5%	57.8%
Family	14.0	21.8	31.0	28.7
Friend	12.3	16.2	11.9	11.0
Spouse/Companion	16.5	19.9	22.7	23.7
% Female Recommending	66.3%	50.5%	62.9%	60.7%
Other Beach Areas Considered (Multiple Response)				
Florida	56.4%	52.3%	45.5%	54.7%
South Carolina	16.7	12.4	12.8	9.0
North Carolina	5.2	3.4	6.6	6.1
Georgia	3.7	3.3	2.3	5.1
Mississippi	5.9	6.0	4.5	5.7
Texas	2.2	4.9	4.4	3.1
Louisiana	2.5	4.2	1.6	6.0
None	33.0	38.8	48.1	38.3



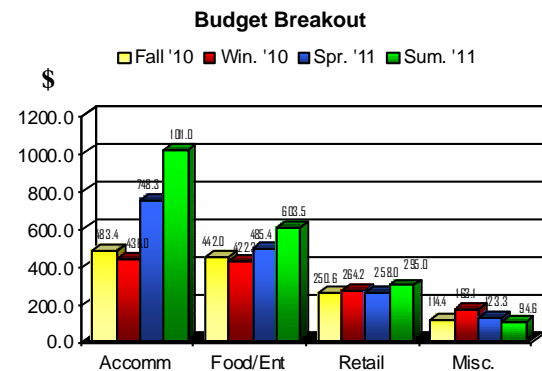
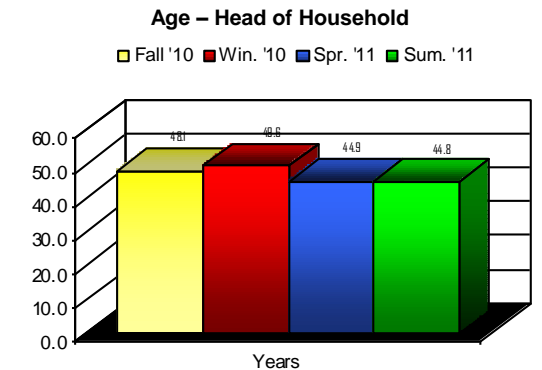
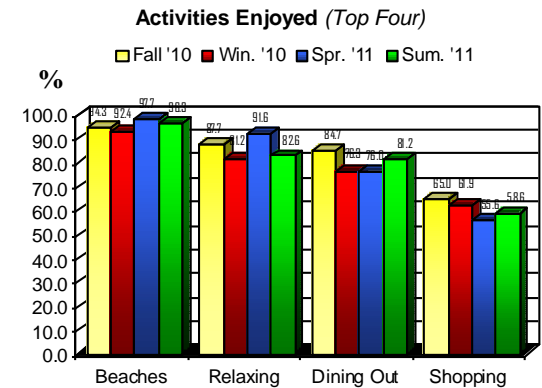
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	<u>Fall '10</u>	<u>Winter '10</u>	<u>Spring '11</u>	<u>Summer '11</u>
Why Choose GSH/ORB (Multiple Response)				
Nice Beaches	31.0%	39.4%	50.8%	57.4%
Close to Home	34.5	34.9	47.7	53.9
Family Oriented	26.4	15.8	29.5	37.9
Familiar/Previous Visit	29.6	34.0	30.8	51.4
Recommended by Friend/Relative	18.5	18.9	17.5	18.3
Accommodations	31.3	23.4	18.3	25.5
Reasonable Rates	32.8	25.7	21.4	43.7
Quiet/Laid Back	26.8	31.2	37.5	43.0
Clean	8.4	9.5	10.9	26.6
Safe Area	28.1	24.2	33.1	22.1
Never Been/Try Something Different	9.4	10.8	10.3	N/A
Not Crowded/Commercial	27.1	22.2	19.6	33.6
Food/Restaurants	25.1	23.1	25.9	N/A
Weather	28.3	27.9	23.8	N/A
Beautiful	7.4	20.7	18.5	N/A
Shopping	13.8	8.2	11.3	N/A
Nature	7.6	13.1	17.9	N/A
Fishing	10.6	8.7	9.6	N/A
Friends/Relatives in Area	9.6	11.5	9.1	N/A
Golfing	9.9	14.4	11.5	N/A
Attractions Visited (Multiple Response)				
Tanger Center	46.3%	43.9%	43.5%	45.5%
The Wharf	26.1	28.6	34.0	34.1
The Track	11.3	9.8	17.9	21.3
Gulf State Park	33.3	33.1	33.5	21.7
Fort Morgan	17.7	25.9	22.1	12.1
Waterville	2.5	N/A	9.1	13.0
Alabama Gulf Coast Zoo	9.4	10.5	11.7	11.3
Battleship USS Alabama	10.6	12.2	9.7	6.3
Pensacola Naval Museum	13.5	16.5	13.5	11.2
Dauphin Island	8.6	15.3	10.2	5.8
Mobile Bay Ferry	8.9	13.8	8.1	3.8
Bon Secour Wildlife Refuge	9.1	12.8	12.0	6.9
Bellingrath Gardens	4.4	8.6	1.3	0.6
None	17.7	16.6	16.3	20.7
Satisfaction with Area				
Very Satisfied	73.6%	72.9%	73.1%	73.2%
Satisfied	<u>21.7</u>	<u>24.1</u>	<u>24.2</u>	<u>22.0</u>
Satisfaction Level	95.3%	97.0%	97.3%	95.2%



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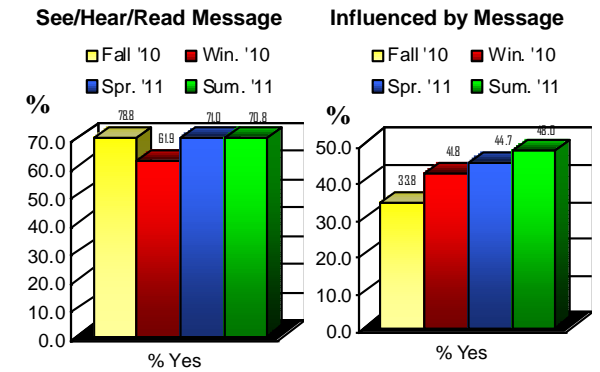
	Fall '10	Winter '10	Spring '11	Summer '11
Recommend Area to Friends	93.6%	94.2%	96.7%	93.9%
Plan to Return (% yes)				
To Local Area	92.6%	89.5%	91.6%	92.3%
Next Year (<i>Base: Return to Local Area</i>)	60.9	76.9	72.1	59.4
Activities Enjoyed in Area (Multiple Response)				
Beaches	94.3%	92.4%	97.7%	96.3%
Relaxing	87.7	81.2	91.6	82.6
Dining Out	84.7	76.3	76.0	81.2
Shopping	65.0	61.9	55.6	58.6
Pool	32.0	20.7	46.6	56.4
Sight Seeing	41.9	53.7	41.6	41.3
Attractions	34.0	26.7	34.9	32.2
Photography	16.5	20.0	18.7	19.1
Wildlife/Environment	17.5	26.6	31.8	21.3
Miniature Golf	11.6	10.5	20.7	23.2
Fishing	15.3	19.4	21.8	18.4
Visiting Friends/Relatives	14.0	22.1	16.5	15.5
Bars/Nightlife	11.8	12.9	17.6	16.8
Seafood/Shrimp Fest	16.3	9.8	4.1	1.5
Movies	3.9	7.6	4.2	6.1
Golfing	13.1	21.3	16.3	9.8
Bird Watching	4.4	8.9	7.2	2.1
Trip to Mississippi Casino	5.4	10.1	3.8	2.7
Cultural Events	8.4	11.2	3.2	2.4
Median Age Head of Household (years)	48.1	49.6	44.9	44.8
Median Annual Household Income*	\$72,026	\$72,410	\$79,127	\$89,023
Visitor Party Budget (<i>GSH/ORB Stay: Food/Lodging/Entertainment</i>)				
Total	\$1,354.13	\$1,316.62	\$1,683.40	\$2,010.47
Per Person/Trip	356.35	424.72	431.64	478.68
Per Person/Day	77.47	70.79	77.08	90.32
Visitor Party Budget Breakout (<i>GSH/ORB Stay</i>)				
Accommodations	\$483.40	\$435.96	\$748.34	\$1,011.02
Food/Entertainment	441.96	422.33	485.44	603.48
Retail/Grocery Purchases	250.64	264.16	257.96	294.97
Miscellaneous Expenditures	114.36	163.10	123.28	94.60



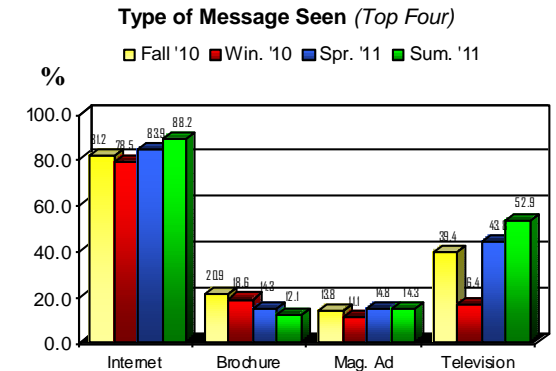
* Please Note: Median household income after taxes

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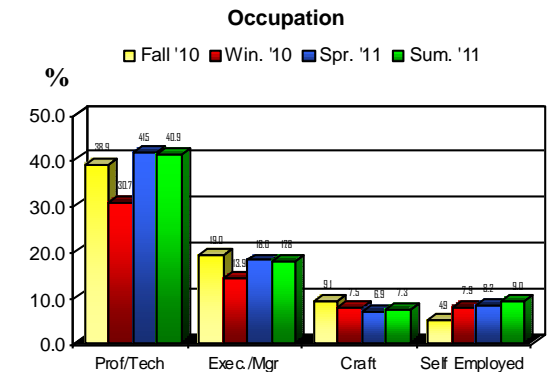
	<u>Fall '10</u>	<u>Winter '10</u>	<u>Spring '11</u>	<u>Summer '11</u>
See/Read/Hear GSH/ORB Message	78.8%	61.9%	71.0%	70.8%
Type of Message Seen				
Internet	81.2%	78.5%	83.9%	88.2%
Brochure	20.9	18.6	14.3	12.1
Magazine Ad	13.8	11.1	14.8	14.3
Television	39.4	16.4	43.8	52.9
Travel/Visitor Guide	14.1	15.0	12.3	15.1
Magazine Story	6.6	9.4	4.0	8.2
Newspaper Story	24.4	11.3	13.3	30.5
Newspaper Ad	5.3	5.7	6.7	6.5
Radio	18.4	6.1	11.0	17.9
Billboards	1.2	3.1	2.0	4.6



Influenced by GSH/ORB Message (Base: Respondents Reporting See/Read/Hear Message)	Fall '10	Winter '10	Spring '11	Summer '11
	33.8%	41.8%	44.7%	48.0%



Occupation	Fall '10	Winter '10	Spring '11	Summer '11
Professional/Technical	38.9%	30.7%	41.5%	40.9%
Executive/Managerial	19.0	13.9	18.0	17.8
Craft/Factory	9.1	7.5	6.9	7.3
Self-Employed	4.9	7.9	8.2	9.0
Retired	8.9	22.9	8.5	7.6
Salesman/Buyer	10.1	7.8	7.4	7.0

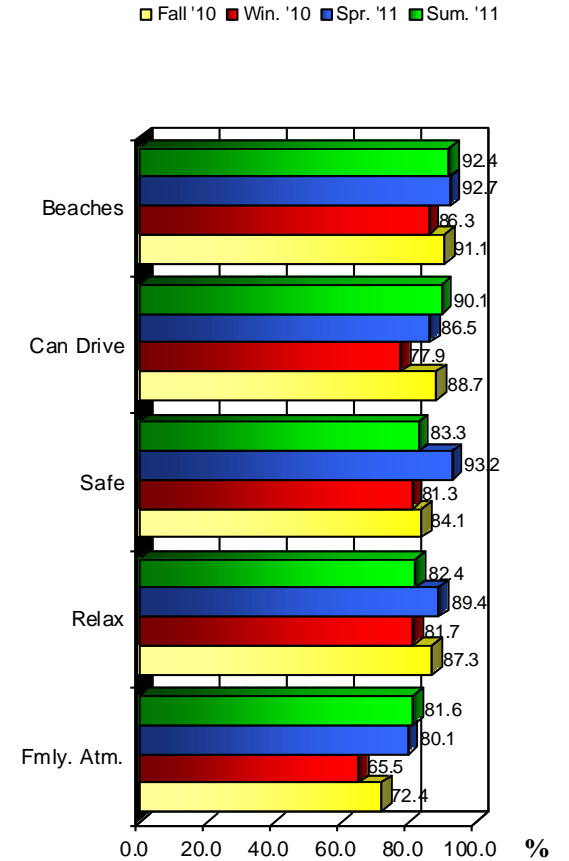


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Influential Factors in Choosing GSH/ORB

	<u>Fall '10</u>	<u>Winter '10</u>	<u>Spring '11</u>	<u>Summer '11</u>
White, Sandy Beaches	91.1%	86.3%	92.7%	92.4%
I Can Drive There with Family	88.7	77.9	86.5	90.1
Safe Destination	84.1	81.3	93.2	83.3
Complete Relaxation	87.3	81.7	89.4	82.4
Family Atmosphere	72.4	65.5	80.1	81.6
Sunning on the Beach	59.0	48.8	74.5	74.5
Good Value for the Money	84.8	78.4	82.0	79.2
Safe Beaches for Children	53.3	43.0	62.2	72.4
Clean, Unspoiled Environment	70.6	71.2	81.9	75.7
Reasonably Priced Lodging	73.2	75.1	77.8	78.1
Warm Weather	75.5	74.0	81.1	76.5
Good Restaurants/Dining Out	75.2	72.5	74.8	74.4
Uncommercialized Beaches	67.0	60.6	65.2	68.6
Upscale Accommodations	55.6	49.4	53.7	56.8
Shopping	46.7	41.6	37.6	51.9
Romantic Place	38.5	40.8	46.7	35.7
Good Fishing	16.0	21.3	16.3	20.5
Good Golfing	15.8	24.2	16.8	14.7
Good Boating	14.1	17.4	15.3	15.7

Influential Factors (Top Five)



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	<u>Fall '10</u>	<u>Winter '10</u>	<u>Spring '11</u>	<u>Summer '11</u>
Requested Additional Information				
About Area for Trip (Multiple Response)				
Did Not Request Information	30.3%	28.4%	29.3%	24.7%
Accessed www.gulfshores.com	32.5	36.9	43.1	41.2
Accessed Individual Hotel/Motel/Condominium Website	32.3	33.2	35.6	38.3
Accessed Destination Sites for Gulf Shores/Orange Beach	24.9	23.1	20.6	27.5
Accessed an Internet Travel Website	19.7	18.6	15.0	18.3
Called a Hotel/Motel/Condominium Toll-Free Number	9.6	7.4	8.3	7.5
Called the CVB Toll-Free Number	3.4	5.3	4.6	3.9
<hr/>				
Use the Internet	97.5%	95.6%	98.8%	98.9%
Seek Out Travel Information On-Line (BASE: Those with Internet Access)	96.2%	93.2%	95.6%	97.3%
Ever Book Reservations On-Line (BASE: Those with Internet Access)	76.3%	78.9%	83.8%	83.9%
Used the Internet to Gather Travel Information for this Trip				
(BASE: Those who Seek Travel Information On-Line)	96.3%	91.9%	95.5%	93.0%
First Time	96.0	94.1	97.4	98.1
Repeat	97.1	90.7	94.8	91.5
Booked Reservations for this Trip on the Internet (BASE: Those who Seek Travel Information On-Line)				
	50.9%	53.1%	56.6%	59.8%
Accessed the Website www.gulfshores.com (BASE: Those who Seek Travel Information On-Line)				
	49.6%	56.8%	60.5%	58.3%
Sources of Information About Destination Once Arrive in Area (Multiple Response)				
Front Desk Personnel	27.6%	35.2%	22.6%	24.5%
Visitor Guides	34.2	21.9	37.4	30.6
Local Information TV Channel	18.2	16.9	19.3	15.7
Visitor Welcome Centers	18.0	20.9	27.4	19.9
Internet	18.7	19.5	17.3	23.7
Maps	19.7	18.6	11.1	14.3
Waiters/Waitresses	17.5	18.8	15.2	15.3
Local Radio	3.2	3.3	8.2	7.4
Smartphones/PDA's/iPods/Navigation Systems	15.0	16.5	20.2	20.4
Don't Look for Information Once in Area	29.3	15.0	21.8	21.6

Planning/Reservation Window Analysis
Days to Arrival

