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2008 - 2009 Visitor Profile
Alabama Gulf Coast Convention & Visitors Bureau



Prepared for:

Alabama Gulf Coast Convention and Visitors Bureau

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2008 - 2009 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

| Regional Distribution of Visitors | Fall 2008 | Winter 2008 | Spring 2009 | Summer 2009 |
|-----------------------------------|---------------|---------------|---------------|---------------|
| Alabama | 44.6% | 32.8% | 38.3% | 34.9% |
| Southeast | 37.0 | 21.3 | 39.1 | 50.4 |
| Northeast | 1.3 | 2.1 | 1.7 | 0.9 |
| Midwest | 9.9 | 38.4 | 16.8 | 10.0 |
| Southwest | 3.5 | 3.0 | 3.1 | 3.1 |
| Markets of Opportunity | 3.7 | 2.4 | 1.0 | 0.7 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% |

| Economic Impact Estimates | Fall 2008 | Winter 2008 | Spring 2009 | Summer 2009 |
|------------------------------|-----------|-------------|-------------|-------------|
| Occupancy Condominium Market | 31.6% | 14.8% | 47.9% | 67.2% |
| Occupancy Hotel/Motel Market | 46.1% | 29.2% | 55.3% | 73.6% |
| ADR Condominium Market | \$103.31 | \$64.06 | \$130.31 | \$194.40 |
| ADR Hotel/Motel Market | \$116.93 | \$76.69 | \$120.02 | \$164.69 |

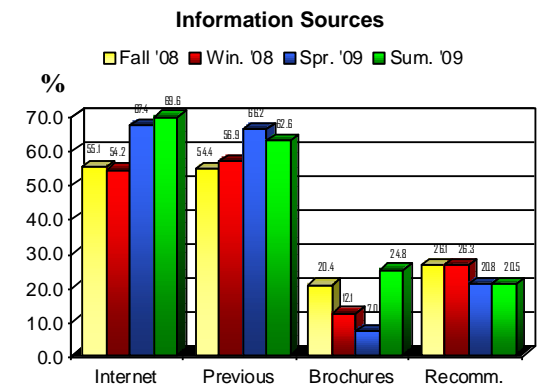
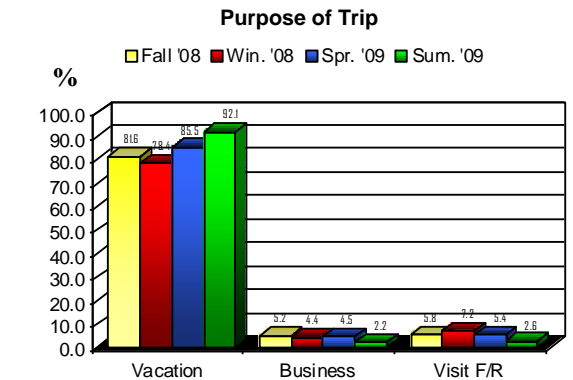
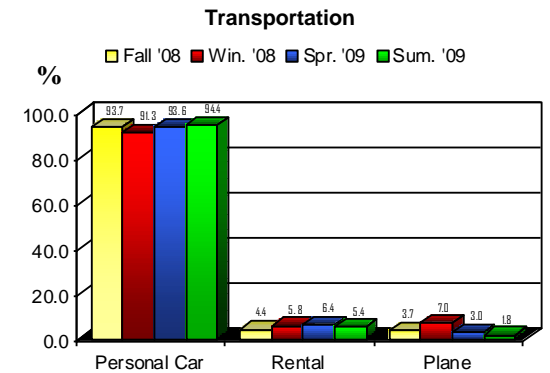
Top U.S. Feeder Markets (By Season)

| Fall 2008 | | Winter 2008 | | Spring 2009 | | Summer 2009 | |
|-----------------------|--------------|-------------------------|--------------|-----------------------|--------------|-----------------------|--------------|
| Core Origin Markets | | Core Origin Markets | | Core Origin Markets | | Core Origin Markets | |
| 1. Birmingham | 25.4% | 1. Birmingham | 17.1% | 1. Birmingham | 13.3% | 1. Birmingham | 17.8% |
| 2. Huntsville/Decatur | 9.1 | 2. Huntsville/Decatur | 6.9 | 2. Huntsville/Decatur | 9.1 | 2. Huntsville/Decatur | 9.4 |
| 3. Nashville | 5.6 | 3. Montgomery/Selma | 6.0 | 3. Mobile/Pensacola | 6.6 | 3. Nashville | 7.8 |
| 4. Atlanta | 4.8 | 4. Nashville | 4.0 | 4. Atlanta | 5.8 | 4. Atlanta | 6.4 |
| 5. Memphis | 4.7 | 5. Minneapolis/St. Paul | 3.8 | 5. Mobile/Pensacola | 5.4 | 5. Memphis | 5.8 |
| 6. Tuscaloosa | 2.8 | 6. Atlanta | 3.4 | 6. Nashville | 4.3 | 6. New Orleans | 3.8 |
| 7. Louisville | 2.7 | 7. Detroit | 3.2 | 7. Jackson, MS | 3.7 | 7. Montgomery | 3.2 |
| 8. Cincinnati | 2.6 | 8. Milwaukee | 2.7 | 8. Laurel/Hattiesburg | 3.4 | 8. Baton Rouge | 3.0 |
| 9. Montgomery/Selma | 2.4 | 9. St. Louis | 2.7 | 9. Baton Rouge | 3.1 | 9. Jackson, MS | 2.8 |
| 10. Meridian | 2.4 | 10. Cincinnati | 2.4 | 10. New Orleans | 3.0 | 10. Mobile | 2.6 |
| | | | | | | 11. Tuscaloosa | 2.6 |
| Total | 62.5% | Total | 52.2% | Total | 57.7% | Total | 65.2% |

| | Fall '08 (Sept. – Oct.) | Winter '08 (Nov. - Feb.) | Spring '09 (Mar. - May) | Summer '09 (Jun. - Aug.) | Annual '08 – '09 |
|----------------------|-------------------------|--------------------------|-------------------------|--------------------------|------------------|
| Number of Visitors | 267,200 | 230,200 | 260,400 | 574,100 | 1,331,900 |
| Visitor Expenditures | \$90,374,384 | \$96,414,700 | \$105,545,300 | \$241,162,187 | \$533,496,571 |

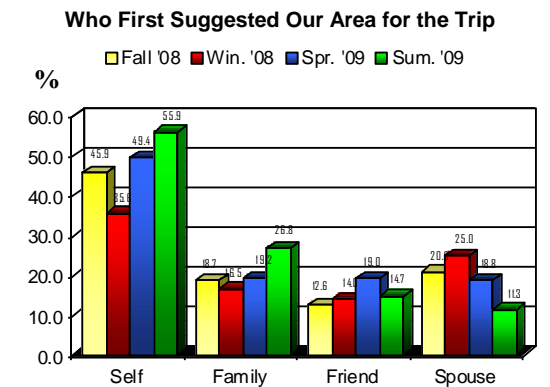
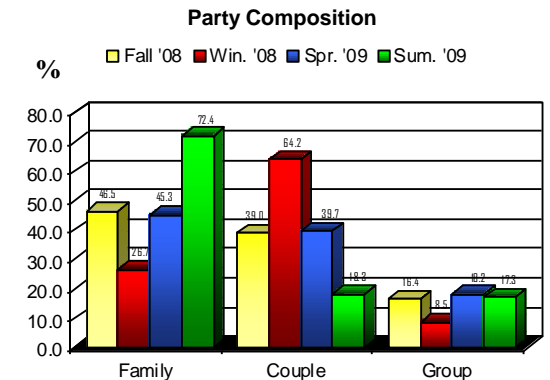
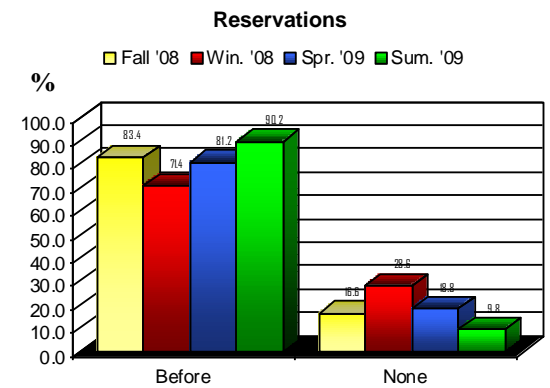
2008 - 2009 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

| | <u>Fall '08</u> | <u>Winter '08</u> | <u>Spring '09</u> | <u>Summer '09</u> |
|---|-----------------|-------------------|-------------------|-------------------|
| Transportation Mode | | | | |
| Personal Car/RV | 93.7% | 91.3% | 93.6% | 94.4% |
| Rental Car | 4.4 | 5.8 | 6.4 | 5.4 |
| Plane | 3.7 | 7.0 | 3.0 | 1.8 |
| Major Highways Used to Reach Area (Multiple Response) | | | | |
| Interstate 65 | 68.2% | 70.6% | 69.2% | 67.0% |
| Interstate 10 | 30.3 | 28.2 | 28.5 | 33.4 |
| U.S. Highway 98 | 7.6 | 8.3 | 10.6 | 12.5 |
| Interstate 85 | 6.8 | 6.6 | 5.8 | 7.8 |
| From Pensacola | 3.3 | 4.8 | 2.6 | 1.8 |
| Purpose of Trip (Primary Reason) | | | | |
| Vacation | 81.6% | 78.4% | 85.5% | 92.1% |
| Business/Meeting/Conference | 5.2 | 4.4 | 4.5 | 2.2 |
| Visit Friends/Relatives | 5.8 | 7.2 | 5.4 | 2.6 |
| Fishing | 2.5 | 0.9 | 0.5 | 0.4 |
| Golfing | 1.0 | 1.5 | 1.9 | 1.0 |
| First Visit to GSH/ORB | 35.0% | 33.5% | 27.0% | 27.9% |
| Average Repeat Visits Past 5 Years (Base: Repeat Visitors) | | | | |
| | 4.4 trips | 4.1 trips | 3.9 trips | 4.0 trips |
| Information Sources (Multiple Response) | | | | |
| Internet | 55.1% | 54.2% | 67.4% | 69.6% |
| Previous Visit | 54.4 | 56.9 | 66.2 | 62.6 |
| Brochures | 20.4 | 12.1 | 7.0 | 24.8 |
| Recommendation by Friend/Relative | 26.1 | 26.3 | 20.8 | 20.5 |
| Vacation/Travel Guides | 12.7 | 15.0 | 5.7 | 14.4 |
| Convention and Visitors Bureau | 6.9 | 7.6 | 6.0 | 7.0 |



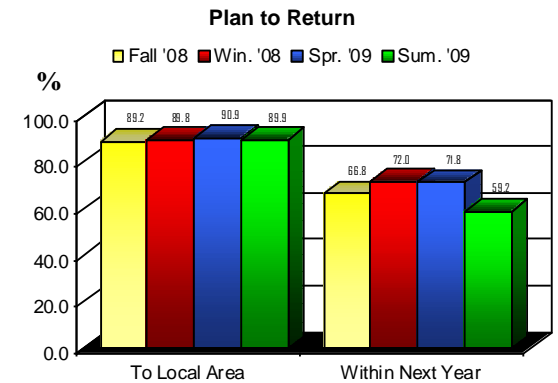
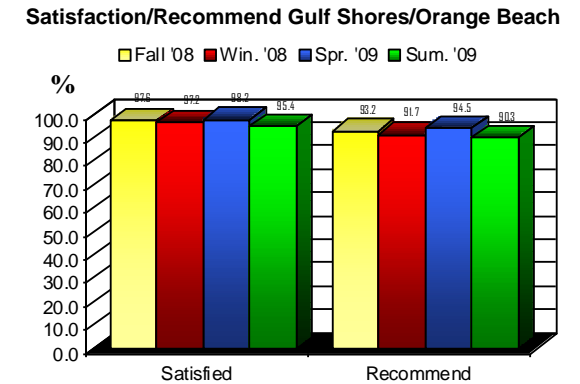
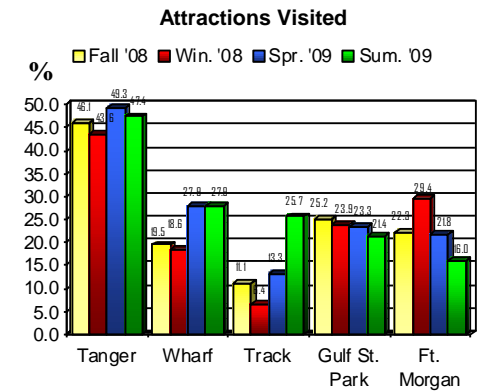
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| | <u>Fall '08</u> | <u>Winter '08</u> | <u>Spring '09</u> | <u>Summer '09</u> |
|--|-----------------|-------------------|-------------------|-------------------|
| Assisted by Travel Professional | 3.8% | 3.0% | 3.6% | 2.9% |
| Reservations | | | | |
| Before Arriving in Area | 83.4% | 71.4% | 81.2% | 90.2% |
| None | 16.6 | 28.6 | 18.8 | 9.8 |
| Length of Stay in GSH/ORB (days) | | | | |
| Vacation Trips | 6.7 | 7.1 | 7.1 | 6.4 |
| Get-Away Trips | 3.1 | 3.2 | 3.1 | 3.3 |
| Party Size (Immediate Travel Party) | 3.9 | 3.0 | 3.9 | 4.5 |
| Party Composition | | | | |
| Family | 46.5% | 26.7% | 45.3% | 72.4% |
| Couple | 39.0 | 64.2 | 39.7 | 18.3 |
| Group of Couples/Friends | 16.4 | 8.5 | 18.2 | 17.3 |
| Single | 2.7 | 2.5 | 1.4 | 0.9 |
| With Business Associates | 2.1 | 2.4 | N/A | 0.8 |
| Traveling with Children | | | | |
| Yes | 38.7% | 20.6% | 49.7% | 70.8% |
| No | 61.3 | 79.4 | 50.3 | 29.2 |
| Who First Suggested Our Area for this Trip (Multiple Response) | | | | |
| Self | 45.9% | 35.6% | 49.4% | 55.9% |
| Family | 18.7 | 16.5 | 19.2 | 26.8 |
| Friend | 12.6 | 14.0 | 19.0 | 14.7 |
| Spouse/Companion | 20.8 | 25.0 | 18.8 | 11.3 |
| % Female Recommending | 63.1% | 53.1% | 63.5% | 65.4% |
| Other Beach Areas Considered (Multiple Response) | | | | |
| Florida | 47.8% | 44.0% | 43.7% | 53.4% |
| South Carolina | 10.8 | 9.2 | 7.3 | 9.2 |
| North Carolina | 4.1 | 5.6 | 5.3 | 5.8 |
| Georgia | 6.1 | 4.4 | 1.2 | 3.3 |
| Mississippi | 9.5 | 7.6 | 1.8 | 5.0 |
| Texas | 3.4 | 6.8 | 1.5 | 3.1 |
| None | 40.9 | 49.9 | 50.8 | 38.7 |



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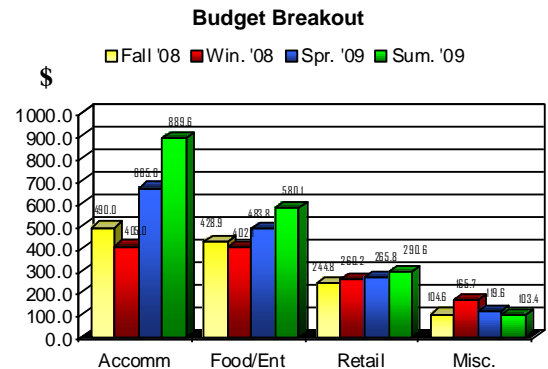
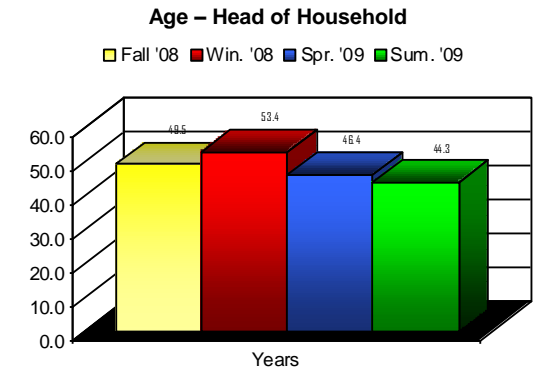
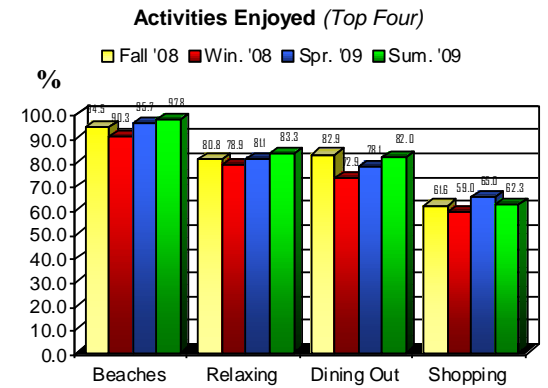
| | <u>Fall '08</u> | <u>Winter '08</u> | <u>Spring '09</u> | <u>Summer '09</u> |
|--|-----------------|-------------------|-------------------|-------------------|
| Why Choose GSH/ORB (Multiple Response) | | | | |
| Nice Beaches | 36.1% | 32.1% | 43.2% | 41.1% |
| Close to Home | 33.9 | 28.8 | 41.4 | 41.5 |
| Family Oriented | 19.0 | 13.9 | 20.1 | 24.9 |
| Familiar/Previous Visit | 24.8 | 30.6 | 32.9 | 27.6 |
| Recommended by Friend/Relative | 21.5 | 18.2 | 17.6 | 17.1 |
| Accommodations | 25.1 | 19.7 | 16.7 | 16.5 |
| Reasonable Rates | 26.8 | 20.2 | 22.5 | 18.3 |
| Quiet/Laid Back | 19.5 | 33.3 | 35.9 | 20.0 |
| Clean | 9.7 | 9.7 | 6.3 | 15.8 |
| Safe Area | 23.2 | 20.9 | 23.0 | 14.8 |
| Never Been/Try Something Different | 11.9 | 18.1 | 5.5 | 13.7 |
| Not Crowded/Commercial | 25.7 | 26.9 | 18.4 | 13.3 |
| Food/Restaurants | 18.5 | 21.6 | 19.2 | 10.9 |
| Weather | 20.7 | 22.3 | 14.6 | 9.3 |
| Beautiful | 8.7 | 19.8 | 16.9 | 9.6 |
| Shopping | 11.4 | 10.1 | 10.5 | 7.3 |
| Nature | 13.4 | 13.5 | 13.4 | 11.5 |
| Fishing | 5.8 | 7.1 | 7.9 | 4.7 |
| Friends/Relatives in Area | 6.5 | 11.6 | 9.0 | 9.6 |
| Golfing | 2.5 | 13.2 | 7.3 | 8.6 |
| Attractions Visited (Multiple Response) | | | | |
| Tanger Center | 46.1% | 43.6% | 49.3% | 47.4% |
| The Wharf | 19.5 | 18.6 | 27.9 | 27.9 |
| The Track | 11.1 | 6.4 | 13.3 | 25.7 |
| Gulf State Park | 25.2 | 23.9 | 23.3 | 21.4 |
| Fort Morgan | 22.3 | 29.4 | 21.8 | 16.0 |
| Waterville | 2.1 | 0.9 | 6.8 | 13.6 |
| Alabama Gulf Coast Zoo | 10.5 | 9.6 | 13.9 | 10.4 |
| Battleship USS Alabama | 12.7 | 10.9 | 8.8 | 10.3 |
| Pensacola Naval Museum | 13.2 | 11.6 | 11.5 | 8.1 |
| Dauphin Island | 10.8 | 11.7 | 7.1 | 8.3 |
| Mobile Bay Ferry | 7.6 | 12.2 | 11.2 | 5.7 |
| Bon Secour Wildlife Refuge | 8.4 | 13.7 | 10.2 | 4.4 |
| Bellingrath Gardens | 3.1 | 7.2 | 3.3 | 0.9 |
| None | 17.8 | 15.5 | 20.6 | 17.7 |
| Satisfaction with Area | | | | |
| Very Satisfied | 75.6% | 76.3% | 72.7% | 70.1% |
| Satisfied | <u>22.0</u> | <u>20.9</u> | <u>25.5</u> | <u>25.3</u> |
| Satisfaction Level | 97.6% | 97.2% | 98.2% | 95.4% |



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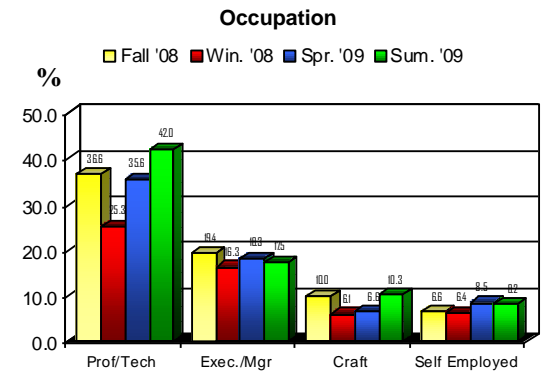
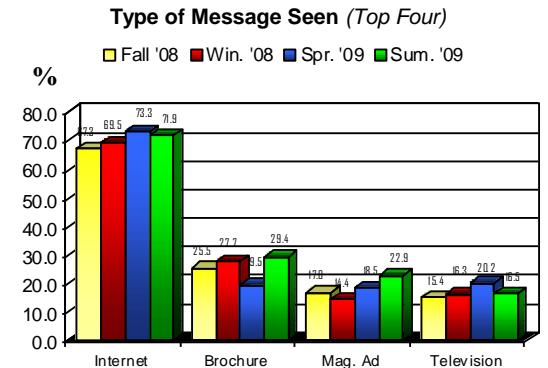
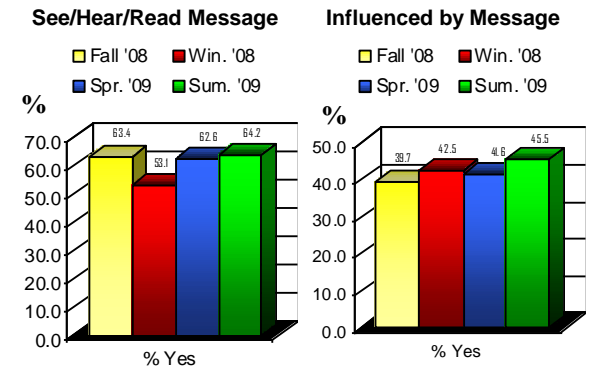
| | Fall '08 | Winter '08 | Spring '09 | Summer '09 |
|---|------------|------------|------------|------------|
| Recommend Area to Friends | 93.2% | 91.7% | 94.5% | 90.3% |
| Plan to Return (% yes) | | | | |
| To Local Area | 89.2% | 89.8% | 90.9% | 89.9% |
| Next Year (Base: Return to Local Area) | 66.8 | 72.0 | 71.8 | 59.2 |
| Activities Enjoyed in Area (Multiple Response) | | | | |
| Beaches | 94.5% | 90.3% | 95.7% | 97.8% |
| Relaxing | 80.8 | 78.9 | 81.1 | 83.3 |
| Dining Out | 82.9 | 72.9 | 78.1 | 82.0 |
| Shopping | 61.6 | 59.0 | 65.0 | 62.3 |
| Pool | 34.4 | 19.4 | 40.2 | 51.8 |
| Sight Seeing | 42.5 | 61.0 | 47.7 | 46.7 |
| Attractions | 36.1 | 24.6 | 38.7 | 39.6 |
| Photography | 17.7 | 12.1 | 20.4 | 23.7 |
| Wildlife/Environment | 20.7 | 21.2 | 28.5 | 24.0 |
| Miniature Golf | 9.7 | 7.2 | 15.4 | 18.9 |
| Fishing | 15.6 | 15.7 | 12.0 | 17.0 |
| Visiting Friends/Relatives | 13.2 | 17.3 | 16.7 | 16.0 |
| Bars/Nightlife | 8.4 | 9.2 | 13.9 | 12.1 |
| Seafood/Shrimp Fest | 16.0 | 12.7 | 6.6 | 12.7 |
| Movies | 4.2 | 7.7 | 6.8 | 7.4 |
| Golfing | 11.5 | 17.8 | 14.8 | 11.5 |
| Bird Watching | 2.4 | 7.5 | 9.7 | 5.9 |
| Median Age Head of Household (years) | 49.5 | 53.4 | 46.4 | 44.3 |
| Median Annual Household Income* | \$75,000 | \$77,172 | \$77,304 | \$83,453 |
| Visitor Party Budget (GSH/ORB Stay: Food/Lodging/Entertainment) | | | | |
| Total | \$1,319.05 | \$1,256.50 | \$1,580.76 | \$1,890.32 |
| Per Person/Trip | 338.22 | 418.83 | 405.32 | 420.07 |
| Per Person/Day | 73.53 | 72.21 | 77.95 | 80.78 |
| Visitor Party Budget Breakout (GSH/ORB Stay) | | | | |
| Accommodations | \$490.00 | \$405.00 | \$665.00 | \$889.60 |
| Food/Entertainment | 428.90 | 402.13 | 483.78 | 580.12 |
| Retail/Grocery Purchases | 244.80 | 260.19 | 265.75 | 290.63 |
| Miscellaneous Expenditures | 104.57 | 165.67 | 119.64 | 103.39 |

* Please Note: Median household income after taxes



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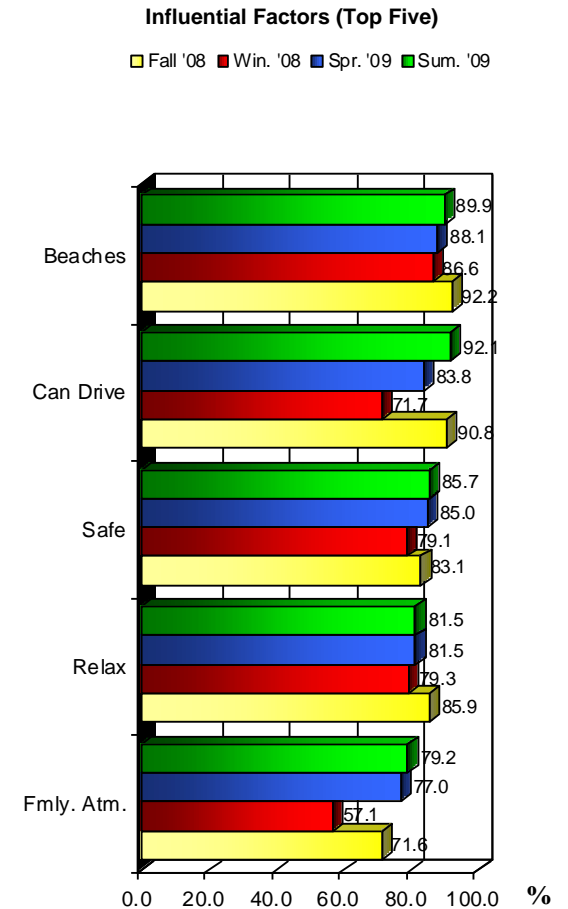
| | <u>Fall '08</u> | <u>Winter '08</u> | <u>Spring '09</u> | <u>Summer '09</u> |
|---|-----------------|-------------------|-------------------|-------------------|
| See/Read/Hear GSH/ORB Message | 63.4% | 53.1% | 62.6% | 64.2% |
| Type of Message Seen | | | | |
| Internet | 67.3% | 69.5% | 73.3% | 71.9% |
| Brochure | 25.5 | 27.7 | 19.5 | 29.4 |
| Magazine Ad | 17.0 | 14.4 | 18.5 | 22.9 |
| Television | 15.4 | 16.3 | 20.2 | 16.5 |
| Travel/Visitor Guide | 18.4 | 17.8 | 11.3 | 17.0 |
| Magazine Story | 5.6 | 8.0 | 4.6 | 7.9 |
| Newspaper Story | 7.3 | 5.3 | 7.3 | 6.1 |
| Newspaper Ad | 5.9 | 8.4 | 10.4 | 7.7 |
| Radio | N/A | 1.0 | 6.3 | 3.3 |
| Billboards | N/A | 1.9 | 1.7 | 4.6 |
| Influenced by GSH/ORB Message (Base: Respondents Reporting See/Read/Hear Message) | 39.7% | 42.5% | 41.6% | 45.5% |
| Occupation | | | | |
| Professional/Technical | 36.6% | 25.3% | 35.6% | 42.0% |
| Executive/Managerial | 19.4 | 16.3 | 18.3 | 17.5 |
| Craft/Factory | 10.0 | 6.1 | 6.6 | 10.3 |
| Self-Employed | 6.6 | 6.4 | 8.5 | 8.2 |
| Retired | 9.4 | 24.0 | 10.1 | 5.0 |
| Salesman/Buyer | 9.7 | 12.5 | 6.9 | 7.8 |



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Influential Factors in Choosing GSH/ORB

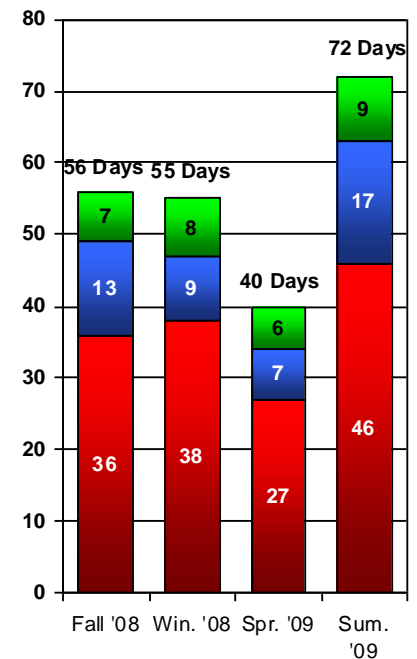
| | <u>Fall '08</u> | <u>Winter '08</u> | <u>Spring '09</u> | <u>Summer '09</u> |
|-------------------------------|-----------------|-------------------|-------------------|-------------------|
| White, Sandy Beaches | 92.2% | 86.6% | 88.1% | 89.9% |
| I Can Drive There with Family | 90.8 | 71.7 | 83.8 | 92.1 |
| Safe Destination | 83.1 | 79.1 | 85.0 | 85.7 |
| Complete Relaxation | 85.9 | 79.3 | 81.5 | 81.5 |
| Family Atmosphere | 71.6 | 57.1 | 77.0 | 79.2 |
| Sunning on the Beach | 55.5 | 46.6 | 66.4 | 77.2 |
| Good Value for the Money | 81.8 | 71.8 | 81.8 | 72.7 |
| Safe Beaches for Children | 56.7 | 40.3 | 62.1 | 72.4 |
| Clean, Unspoiled Environment | 72.7 | 72.5 | 75.9 | 77.8 |
| Reasonably Priced Lodging | 73.4 | 67.7 | 71.9 | 70.0 |
| Warm Weather | 76.1 | 75.5 | 70.9 | 70.8 |
| Good Restaurants/Dining Out | 73.1 | 68.6 | 71.2 | 74.4 |
| Uncommercialized Beaches | 63.0 | 52.8 | 57.6 | 66.2 |
| Upscale Accommodations | 51.4 | 51.8 | 54.4 | 54.8 |
| Romantic Place | 37.1 | 35.5 | 40.7 | 32.0 |
| Good Fishing | 16.8 | 15.9 | 12.0 | 18.1 |
| Good Golfing | 14.1 | 24.9 | 13.6 | 16.1 |
| Good Boating | 12.9 | 17.6 | 10.1 | 12.6 |



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| | <u>Fall '08</u> | <u>Winter '08</u> | <u>Spring '09</u> | <u>Summer '09</u> |
|---|-----------------|-------------------|-------------------|-------------------|
| Requested Additional Information | | | | |
| About Area for Trip (Multiple Response) | | | | |
| Did Not Request Information | 37.1% | 33.5% | 38.5% | 38.6% |
| Accessed www.gulfshores.com | 27.6 | 30.8 | 37.5 | 39.1 |
| Accessed Individual Hotel/Motel/Condominium Website | 29.6 | 32.4 | 24.4 | 36.0 |
| Accessed Destination Sites for Gulf Shores/Orange Beach | 24.5 | 23.5 | 18.3 | 21.0 |
| Accessed an Internet Travel Website | 16.3 | 14.4 | 15.7 | 11.7 |
| Called a Hotel/Motel/Condominium Toll-Free Number | 9.0 | 7.7 | 9.3 | 12.4 |
| Called the CVB Toll-Free Number | 3.5 | 5.2 | 4.8 | 3.2 |
| <hr/> | | | | |
| Have Access to the Internet | 94.3% | 94.0% | 94.5% | 98.2% |
| Seek Out Travel Information On-Line (BASE: Those with Internet Access) | 93.0% | 93.5% | 92.2% | 94.4% |
| Ever Book Reservations On-Line (BASE: Those with Internet Access) | 69.6% | 73.7% | 75.1% | 79.0% |
| Used the Internet to Gather Travel Information for this Trip | | | | |
| (BASE: Those who Seek Travel Information On-Line) | 89.7% | 82.6% | 86.0% | 91.9% |
| First Time | 98.3 | 91.4 | 93.5 | 96.3 |
| Repeat | 84.4 | 77.9 | 82.9 | 90.1 |
| Booked Reservations for this Trip on the Internet (BASE: Those who Seek Travel Information On-Line) | 42.0% | 38.8% | 44.2% | 47.0% |
| Accessed the Website www.gulfshores.com (BASE: Those who Seek Travel Information On-Line) | 42.7% | 48.8% | 56.6% | 52.6% |
| Sources of Information About Destination Once Arrive in Area (Multiple Response) | | | | |
| Front Desk Personnel | 31.8% | 33.0% | 27.1% | 32.2% |
| Visitor Guides | 33.8 | 23.7 | 29.6 | 32.9 |
| Local Information TV Channel | 14.2 | 18.0 | 22.1 | 15.8 |
| Visitor Welcome Centers | 16.3 | 19.2 | 21.6 | 17.6 |
| Internet | 14.7 | 17.7 | 16.7 | 18.6 |
| Maps | 19.3 | 15.6 | 12.6 | 17.2 |
| Waiters/Waitresses | 16.0 | 16.9 | 15.5 | 12.1 |
| Local Radio | N/A | 1.2 | N/A | 3.6 |
| Don't Look for Information Once in Area | 35.9 | 16.6 | 32.8 | 29.6 |

Planning/Reservation Window Analysis
Days to Arrival



■ Reservation ■ Decide
■ Start Talking ■ Total