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**Fall 2008 - Summer 2009 First Time Visitor Profile
Alabama Gulf Coast Convention & Visitors Bureau**



Prepared for:

Alabama Gulf Coast Convention and Visitors Bureau

Prepared by:

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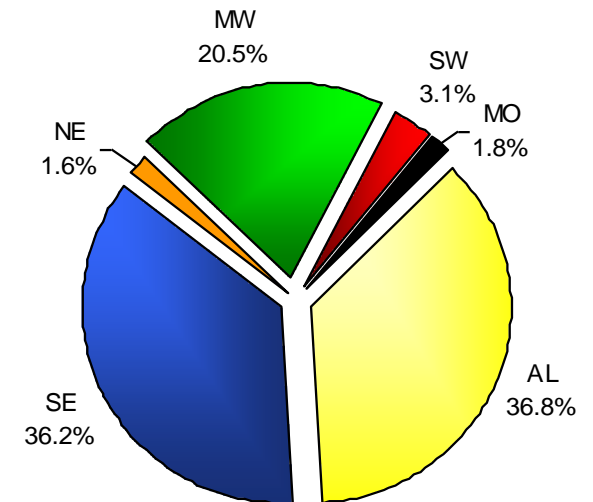
December 4, 2009

Fall 2008 - Summer 2009 First Time Visitor Profile -- Alabama Gulf Coast Convention & Visitors Bureau

	All Visitors 2008/09 Year	First Time Visitors	Repeat Visitors
Number of Visitors	1,331,900	406,230	925,670
Visitor Expenditures	\$533,496,571	\$152,421,558	\$381,075,013

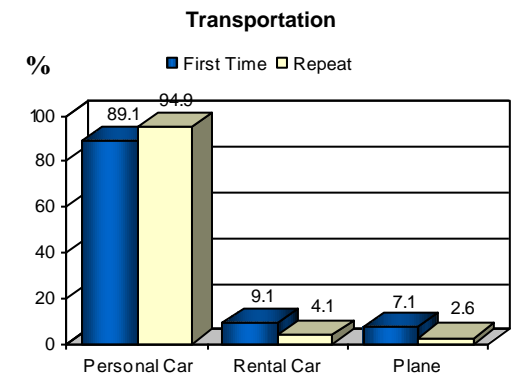
Regional Visitor Distribution	All Visitors	First Time Visitors	Repeat Visitors
Alabama	36.8%	16.8%	45.6%
Southeast	36.2	44.2	32.7
Northeast	1.6	1.7	1.5
Midwest	20.5	29.8	16.4
Southwest	3.1	4.2	2.7
Markets of Opportunity	1.8	3.3	1.1
Total	100.0%	100.0%	100.0%

2008/09 Regional Distribution of Visitors

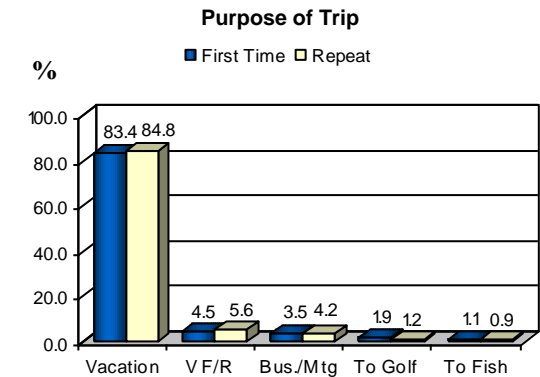
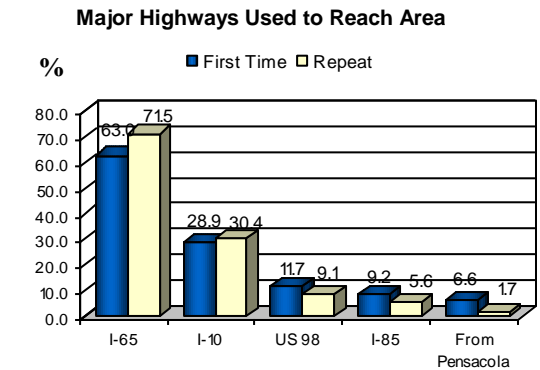


	Fall 2008	Winter 2008/09	Spring 2009	Summer 2009	2008/09 Year
First Time Visitors	35.0%	33.5%	27.0%	27.9%	30.5%
Repeat Visitors	65.0	66.5	73.0	72.1	69.5

	<u>All Visitors</u>	<u>First Time Visitors</u>	<u>Repeat Visitors</u>
Transportation Mode			
Personal Car/RV	93.1%	89.1%	94.9%
Rental Car	5.6	9.1	4.1
Plane	4.0	7.1	2.6
Major Highways Used to Reach Area			
Interstate 65	68.9%	63.0%	71.5%
Interstate 10	30.0	28.9	30.4
U.S. Highway 98	9.9	11.7	9.1
Interstate 85	6.7	9.2	5.6
From Pensacola	3.2	6.6	1.7



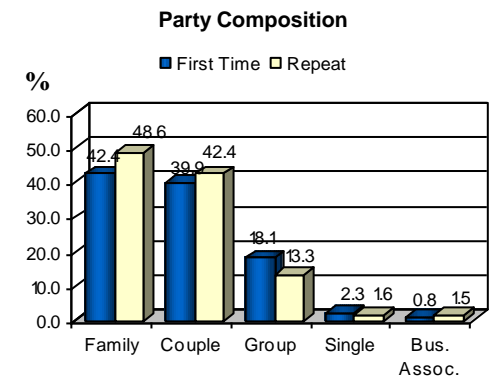
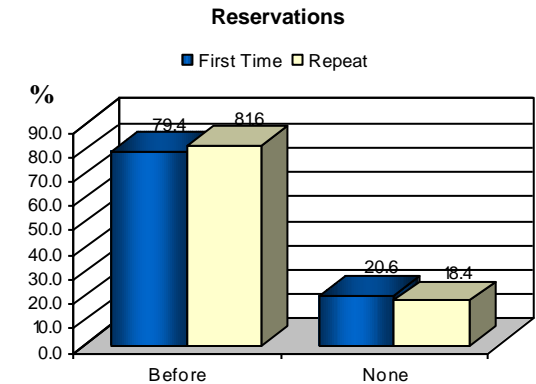
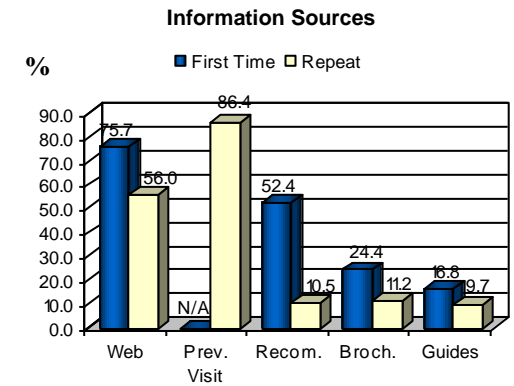
	<u>All Visitors</u>	<u>First Time Visitors</u>	<u>Repeat Visitors</u>
Purpose of Trip (Primary Reason)			
Vacation	84.4%	83.4%	84.8%
Visit Friends/Relatives	5.3	4.5	5.6
Business/Meeting/Conference	4.0	3.5	4.2
To Golf	1.4	1.9	1.2
To Fish	0.9	1.1	0.9
Making Trips Outside of Gulf Shores/ Orange Beach on this Visit			
	6.7%	11.4%	4.7%



Note: Statistically Significant Difference

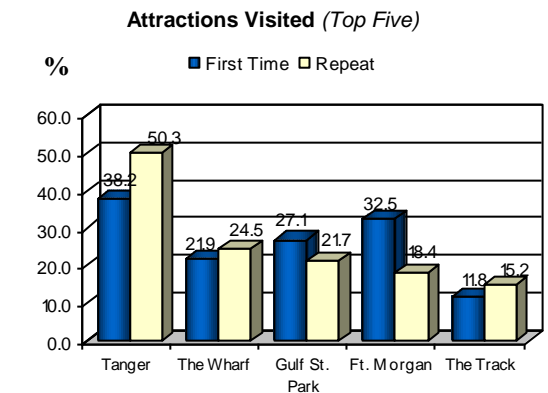
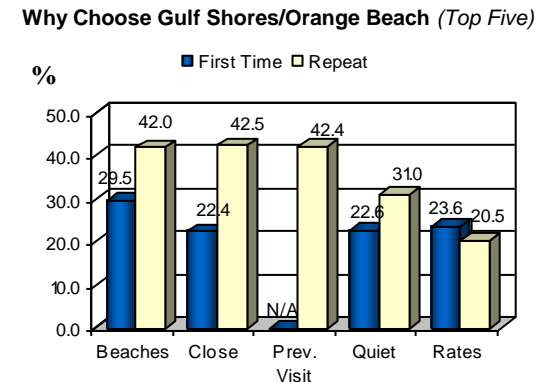
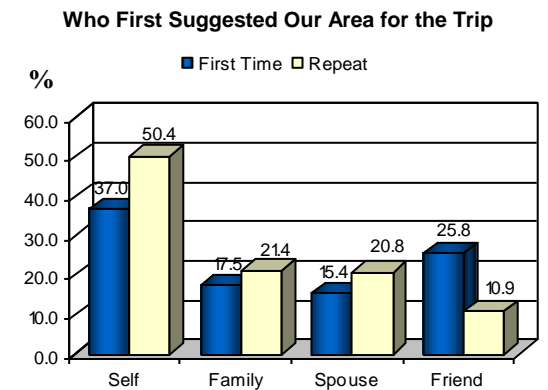
Fall 2008 - Summer 2009 First Time Visitor Profile -- Alabama Gulf Coast Convention & Visitors Bureau

	<u>All Visitors</u>	<u>First Time Visitors</u>	<u>Repeat Visitors</u>
Average Repeat Visits to GSH/ORB over past 5 years (Base: Repeat Visitors)	4.1 trips	N/A	4.1 trips
Information Sources (Multiple Response)			
Internet	62.0%	75.7%	56.0%
Previous Visit	60.6	N/A	86.4
Recommendation by Friend/Relative	23.2	52.4	10.5
Brochures	15.2	24.4	11.2
Vacation/Travel Guides	11.8	16.8	9.7
Convention and Visitors Bureau	6.9	8.1	6.4
Assisted by Travel Agent	3.3%	4.3%	2.8%
Reservations			
Before Arriving in Area	80.9%	79.4%	81.6%
None	19.1	20.6	18.4
	<u>All Visitors</u>	<u>First Time Visitors</u>	<u>Repeat Visitors</u>
Length of Stay in GSH/ORB (Days)	5.3	5.0	5.4
Party Size (Immediate Travel Party)	3.8	3.8	3.8
Party Composition (Multiple Response)			
Family	46.7%	42.4%	48.6%
Couple	41.6	39.9	42.4
Group of Couples/Friends	14.7	18.1	13.3
Single	1.8	2.3	1.6
With Business Associates	1.3	0.8	1.5
Traveling with Children			
Yes	44.4%	46.9%	43.4%
No	55.6	53.1	56.6



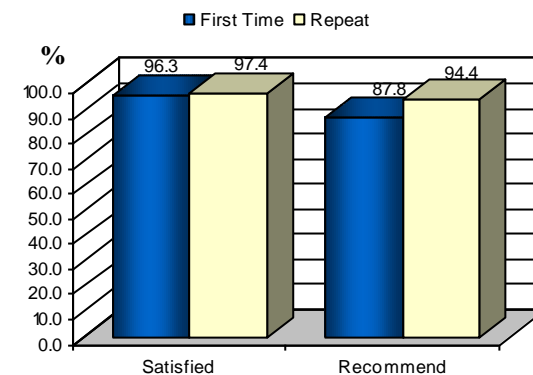
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	<u>All Visitors</u>	<u>First Time Visitors</u>	<u>Repeat Visitors</u>
Who First Suggested Our Area for this Trip (Multiple Response)			
Self	46.3%	37.0%	50.4%
Family	20.2	17.5	21.4
Spouse/Companion	19.1	15.4	20.8
Friend	15.4	25.8	10.9
Other Beach Areas Considered (Multiple Response)			
Florida	46.9%	65.7%	38.7%
South Carolina	8.9	19.8	4.2
Mississippi	5.6	10.2	3.6
North Carolina	5.3	12.8	2.1
Texas	3.8	7.7	2.1
Georgia	3.5	8.6	1.2
None	45.9	23.6	55.7
Why Choose GSH/ORB (Multiple Response)			
Nice Beaches	38.2%	29.5%	42.0%
Close to Home	36.4	22.4	42.5
Previous Visit	29.6	N/A	42.4
Quiet/Laid Back	28.5	22.6	31.0
Reasonable Rates	21.4	23.6	20.5
Not Crowded/Commercial	20.8	13.9	23.9
Safe Area	20.4	12.0	24.0
Family Oriented	19.3	11.4	22.7
Accommodations	18.9	22.5	17.4
Recommended	18.3	41.5	8.1
Food/Restaurants	17.7	14.8	19.0
Weather	16.6	21.9	14.3
Attractions Visited (Multiple Response)			
Tanger Center	46.6%	38.2%	50.3%
The Wharf	23.7	21.9	24.5
Gulf State Park	23.3	27.1	21.7
Fort Morgan	22.7	32.5	18.4
The Track	14.0	11.8	15.2
Pensacola Naval Museum	10.9	16.8	8.4
Battleship USS Alabama	10.4	18.1	7.1
Alabama Gulf Coast Zoo	10.4	9.8	10.6
Mobile Bay Ferry	9.6	14.7	7.3
Bon Secour Wildlife Refuge	9.5	11.7	8.6
Dauphin Island	9.4	12.8	7.9
None	17.9	19.5	17.2

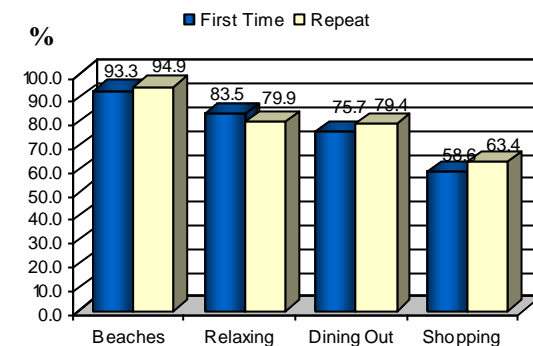


	<u>All Visitors</u>	<u>First Time Visitors</u>	<u>Repeat Visitors</u>
Satisfaction with GSH/ORB			
Very Satisfied	73.6%	63.3%	78.1%
Satisfied	23.5	33.0	19.3
Satisfaction Level	97.1%	96.3%	97.4%
Activities Enjoyed in GSH/ORB (Multiple Response)			
Beaches	94.4%	93.3%	94.9%
Relaxing	81.0	83.5	79.9
Dining Out	78.3	75.7	79.4
Shopping	61.9	58.6	63.4
Sight Seeing	50.6	57.3	47.7
Pool	35.9	32.4	37.4
Attractions	34.2	34.0	34.4
Wildlife/Environment	23.9	23.7	24.0
Photography	18.0	23.5	16.0
Visiting Friends/Relatives	16.1	17.9	15.3
Fishing	14.9	12.6	16.0
Golfing	14.3	14.9	14.1
Miniature Golf	12.9	14.3	12.3
Bars/Night Life	11.1	15.4	9.3
Seafood	9.7	7.7	10.6
Movies	6.8	4.9	7.7
Bird Watching	6.1	7.5	5.5

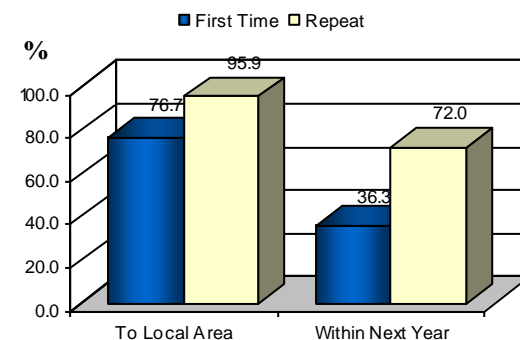
Satisfaction/Recommend Gulf Shores/Orange Beach



Activities Enjoyed (Top Four)



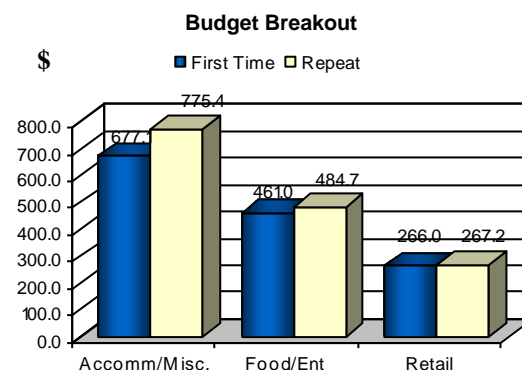
Plan to Return



	<u>All Visitors</u>	<u>First Time Visitors</u>	<u>Repeat Visitors</u>
Recommend GSH/ORB to Friends/Relatives (% yes)			
	92.4%	87.8%	94.4%
Plan to Return (% yes)			
To Local Area	90.0%	76.7%	95.9%
Next Year (BASE: All Respondents)	61.1	36.3	72.0
Median Age Head of Household (years)	49.0	46.7	49.8
Median Annual Household Income	\$78,370	\$73,642	\$80,566

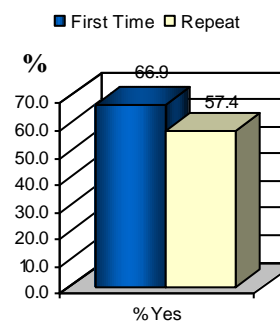
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	<u>All Visitors</u>	<u>First Time Visitors</u>	<u>Repeat Visitors</u>
Visitor Party Budget (GSH/ORB Stay: Food/Lodging/Entertainment)			
Total	\$1,518.86	\$1,425.79	\$1,556.78
Per Person/Trip	399.70	375.21	409.68
Per Person/Day	75.42	75.04	75.87

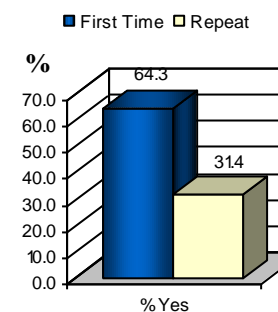


Visitor Party Budget Breakout (GSH/ORB Stay)	<u>All Visitors</u>	<u>First Time Visitors</u>	<u>Repeat Visitors</u>
Accommodations/Misc. Expenses	\$747.94	\$677.07	\$775.38
Food/Entertainment	477.62	460.95	484.67
Retail/Grocery	266.83	266.00	267.19

See/Hear/Read Message



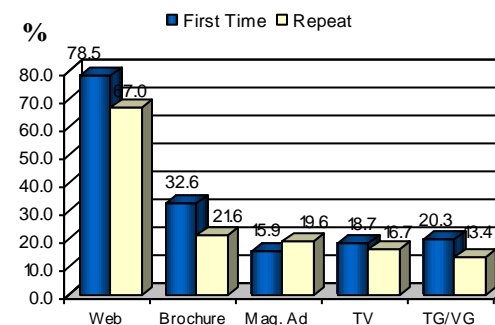
Influenced by Message



See/Read/Hear GSH/ORB Message	<u>All Visitors</u>	<u>First Time Visitors</u>	<u>Repeat Visitors</u>
	60.3%	66.9%	57.4%

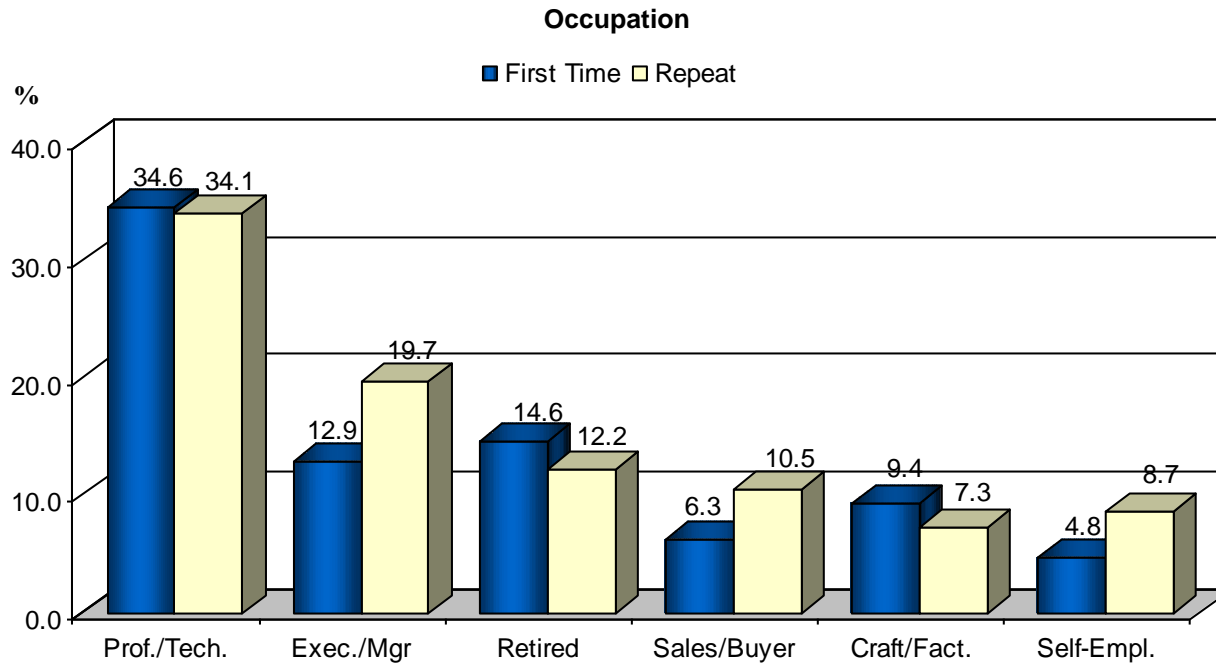
Type of Message Seen (Multiple Response) (BASE: Respondents Reporting See/Read/Hear Message)	<u>All Visitors</u>	<u>First Time Visitors</u>	<u>Repeat Visitors</u>
Internet	70.9%	78.5%	67.0%
Brochure	25.3	32.6	21.6
Magazine Ad	18.3	15.9	19.6
Television	17.4	18.7	16.7
Travel/Visitor Guide	15.8	20.3	13.4
Newspaper Ad	8.4	7.4	8.9
Magazine Story	6.5	6.1	6.8
Newspaper Story	6.4	4.7	7.3
Radio	3.0	2.5	3.3

Type of Message Seen (Top Five)



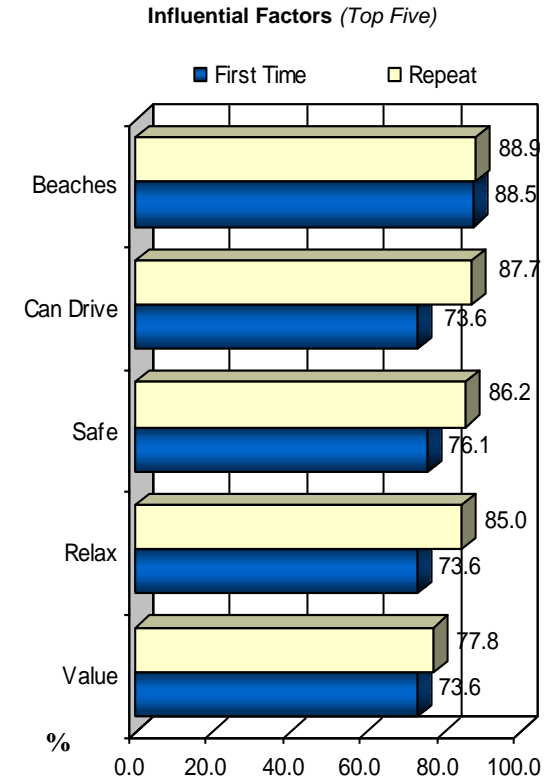
Influenced by GSH/ORB Message (BASE: Respondents Reporting See/Read/Hear Message)	<u>All Visitors</u>	<u>First Time Visitors</u>	<u>Repeat Visitors</u>
	42.6%	64.3%	31.4%

Occupation	All Visitors	First Time Visitors	Repeat Visitors
Professional/Technical	34.3%	34.6%	34.1%
Executive/Managerial	17.6	12.9	19.7
Retired	12.9	14.6	12.2
Salesman/Buyer	9.3	6.3	10.5
Craft/Factory	7.9	9.4	7.3
Self-Employed	7.5	4.8	8.7



Influential Factors in Choosing Gulf Shores/Orange Beach

	<u>All Visitors</u>	<u>First Time Visitors</u>	<u>Repeat Visitors</u>
White, Sandy Beaches	88.8%	88.5%	88.9%
I Can Drive There With My Family	83.4	73.6	87.7
Safe Destination	83.1	76.1	86.2
Complete Relaxation	81.6	73.6	85.0
Good Value for the Money	76.5	73.6	77.8
Clean, Unspoiled Environment	74.9	70.1	77.0
Warm Weather	73.1	78.5	70.7
Good Restaurants/Dining Out	71.5	61.5	76.0
Family Atmosphere	70.7	63.1	74.1
Reasonably Priced Lodging	70.4	69.6	70.8
Sunning on the Beach	61.4	62.1	61.1
Uncommercialized Beaches	59.2	47.8	64.2
Safe Beaches for Children	57.3	50.3	60.4
Upscale Accommodations	53.2	48.9	55.2
Shopping	44.1	33.8	48.6
Romantic Place	36.4	29.9	39.2
Good Golfing	17.7	18.7	17.2
Good Fishing	15.5	14.1	16.1
Good Boating	13.4	10.0	14.9



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	<u>All Visitors</u>	<u>First Time Visitors</u>	<u>Repeat Visitors</u>
Have Access to the Internet	95.3%	97.0%	94.5%
Seek Out Travel Information On-Line (BASE: Those with Internet Access)	93.3%	97.1%	91.6%
Ever Book Reservations On-Line (BASE: Those with Internet Access)	74.8%	81.6%	71.7%
Used the Internet to Gather Travel Information for this Trip (BASE: Those who Seek Travel Information On-Line)	87.1%	94.4%	83.7%
Booked Reservations for this Trip on the Internet (BASE: Those who Seek Travel Information On-Line)	43.0%	45.1%	42.0%
Accessed the Website www.gulfshores.com (BASE: Those who Seek Travel Information On-Line)	51.0%	55.4%	48.9%

	<u>All Visitors</u>	<u>First Time Visitors</u>	<u>Repeat Visitors</u>
Requested Information about Area for Trip (Multiple Response)			
Accessed www.gulfshores.com	34.3%	43.7%	30.2%
Accessed individual hotel/motel/condominium website	30.6	30.9	30.4
Accessed destination sites for Gulf Shores/Orange Beach	21.6	32.9	16.6
Accessed an on-line travel agency website	14.4	21.9	11.1
Called a hotel/motel/condominium toll-free number	9.5	11.5	8.7
Called the CVB toll-free number	4.3	5.2	4.0
Did not request information	36.8	24.6	42.1

	<u>All Visitors</u>	<u>First Time Visitors</u>	<u>Repeat Visitors</u>
Sources of Information about Destination Once Arrive in Area (Multiple Response)			
Front desk personnel	31.0%	35.7%	28.9%
Visitor guides	29.3	29.3	29.3
Visitor welcome centers	19.0	17.9	19.5
Local information TV channel	18.0	18.4	17.8
Internet	17.1	22.8	14.7
Maps	15.8	25.8	11.3
Waiters/waitresses	15.1	18.8	13.5
Don't look for information once in area	27.6	23.0	29.6