



## EVANS - KLAGES, INC.

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# Spring 2009 Visitor Profile Alabama Gulf Coast Convention & Visitors Bureau



**Prepared for:**

Alabama Gulf Coast Convention and Visitors Bureau

**Prepared by:**

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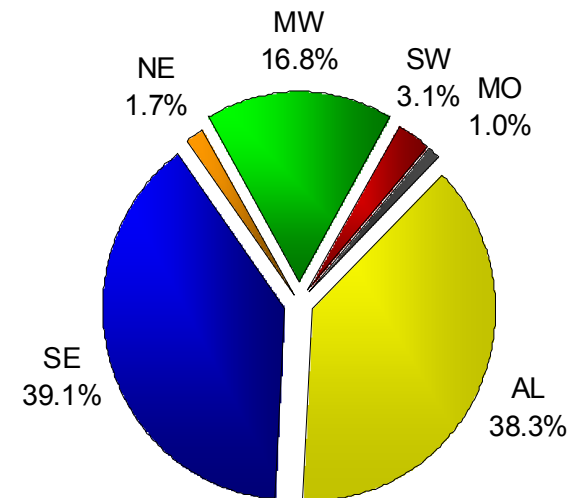
August 20, 2009

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

	Spring '06	Spring '07	Spring '08	Spring '09	'08-'09 % Δ
Number of Visitors	255,820	275,190	267,100	260,400	-2.5
Visitor Expenditures	\$110,265,536	\$121,892,660	\$115,977,491	\$105,545,300	-9.0

**2009 Regional Distribution of Visitors**



Regional Visitor Distribution	Spring '06	Spring '07	Spring '08	Spring '09
Alabama	33.0%	34.5%	34.7%	38.3%
Southeast	39.4	36.7	37.7	39.1
Northeast	1.4	1.7	2.7	1.7
Midwest	20.5	22.3	19.6	16.8
Southwest	4.0	3.2	3.6	3.1
Markets of Opportunity	1.7	1.6	1.7	1.0
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

	Spring 2006		Spring 2007		Spring 2008		Spring 2009	
	Occ.	Rm. Nights	Occ.	Rm. Nights	Occ.	Rm. Nights	Occ.	Rm. Nights
Lodging Occupancy								
Condominium Market	49.6%	304,833	50.3%	322,987	46.1%	310,668	47.9%	302,842
Hotel/Motel Market	76.6	108,175	69.9	105,208	61.6	94,019	55.3	99,412

Average Daily Rate	Spring 2006	Spring 2007	Spring 2008	Spring 2009
	Condominium Market	\$120.38	\$137.39	\$141.48
Hotel/Motel Market	109.03	122.44	123.70	120.02

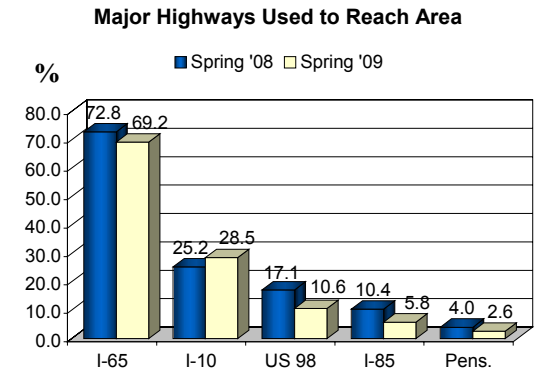
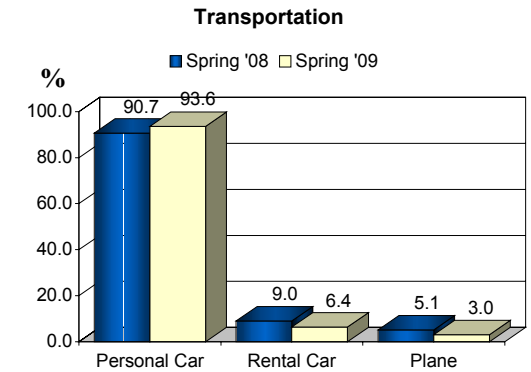
## TOP U.S. FEEDER MARKETS

Core Origin Markets		Spring 2006		Spring 2007		Spring 2008		Spring 2009
'09 Rank		%	'06 Rank	%	'07 Rank	%	'08 Rank	%
1.	Birmingham	13.0%	1	12.5%	1	12.0%	1	13.3%
2.	Huntsville/Decatur	7.4	2	8.0	2	9.4	2	9.1
3.	Montgomery/Selma	4.5	6	3.6	7	4.7	4	6.6
4.	Atlanta	5.8	3	5.1	4	4.0	8	5.8
5.	Mobile/Pensacola	4.8	4	5.0	5	4.4	6	5.4
6.	Nashville	4.4	7	5.3	3	7.1	3	4.3
7.	Jackson, MS	3.6	8	3.3	9	4.2	7	3.7
8.	Laurel/Hattiesburg	**	**	**	**	**	**	3.4
9.	Baton Rouge	**	**	3.1	11	2.6	10	3.1
10.	New Orleans	4.7	5	3.5	8	4.5	5	3.0

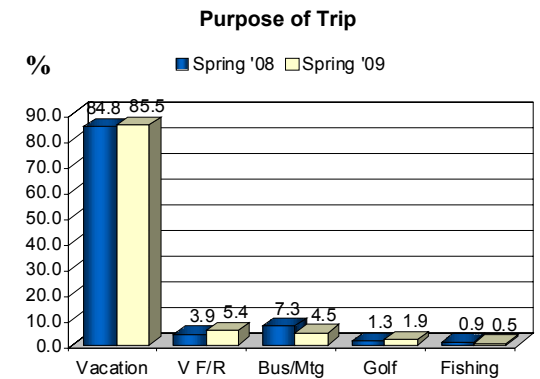
\*\* Please Note: Not in Top Ten Listing

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

	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
<b>Transportation Mode</b>				
Personal Car/R.V.	91.0%	90.0%	90.7%	93.6%
Rental Car	8.0	8.9	9.0	6.4
Plane	6.2	6.3	5.1	3.0
<b>Major Highways Used to Reach Area</b> (Multiple Response)				
Interstate 65	66.8%	70.7%	72.8%	69.2%
Interstate 10	28.6	26.2	25.2	28.5
U.S. Highway 98	13.3	13.2	17.1	10.6
Interstate 85	7.2	7.3	10.4	5.8
From Pensacola	6.0	5.9	4.0	2.6

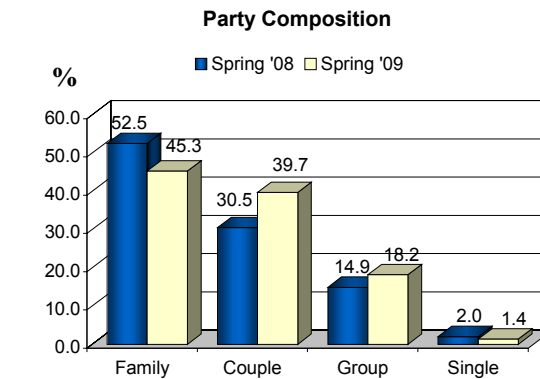
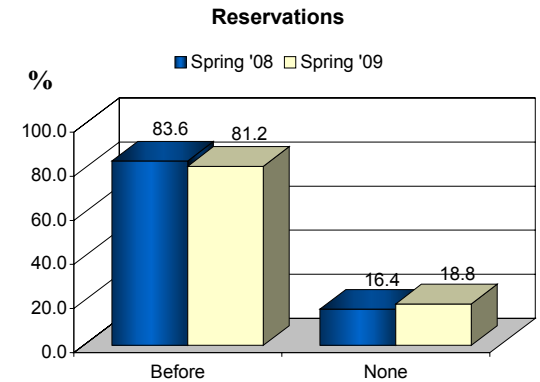
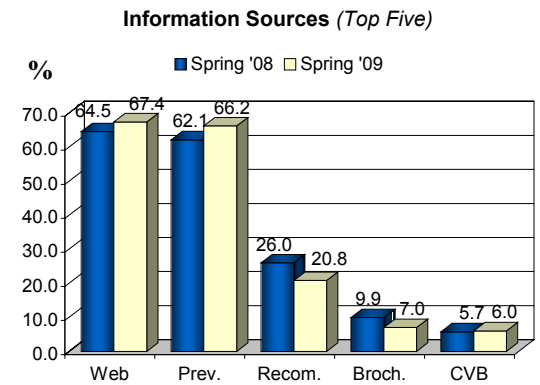


	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
<b>Purpose of Trip (Primary Reason)</b>				
Vacation	82.2%	82.6%	84.8%	85.5%
Visit Friends/Relatives	3.6	3.8	3.9	5.4
Business/Meeting/Conference	8.6	8.8	7.3	4.5
Golfing	1.9	0.9	1.3	1.9
Fishing	2.0	1.7	0.9	0.5
<b>First Visit to GSH/ORB</b>				
	21.7%	26.2%	29.9%	27.0%



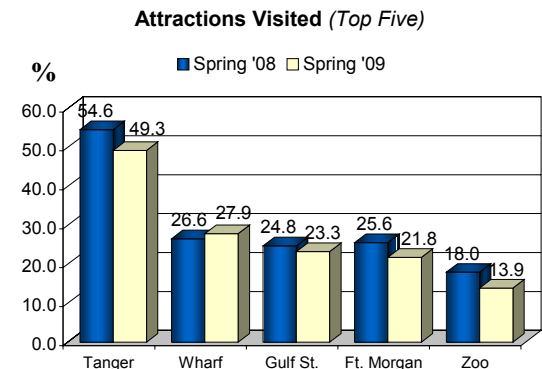
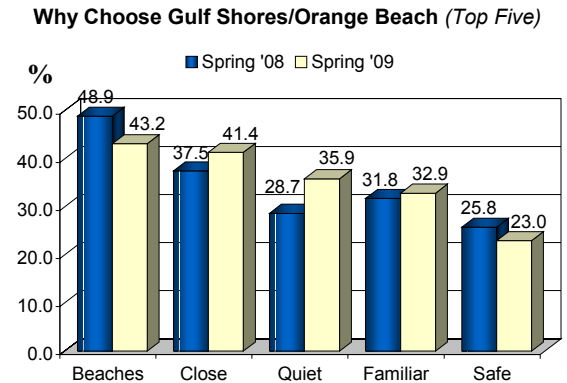
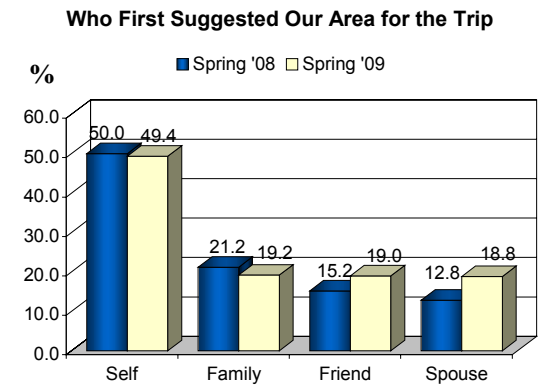
## Spring 2009 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
<b>Average Repeat Visits to GSH/ORB Over Past 5 Years</b> (Base: Repeat Visitors)	4.6 trips	4.5 trips	4.2 trips	3.9 trips
<b>Information Sources (Multiple Response)</b>				
Internet	58.4%	60.1%	64.5%	67.4%
Previous Visit	64.9	61.3	62.1	66.2
Recommendation by Friend/Relative	18.3	23.6	26.0	20.8
Brochures	7.8	7.1	9.9	7.0
Convention and Visitors Bureau	5.2	7.9	5.7	6.0
Travel/Vacation Guide	4.0	6.1	8.8	5.7
Business	6.3	5.3	7.3	3.7
<b>Assisted by Travel Agent</b>	3.5%	3.4%	3.1%	3.6%
<b>Reservations</b>				
Before Arriving in Area	88.3%	88.8%	83.6%	81.2%
None	11.7	11.2	16.4	18.8
	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
<b>Length of Stay in GSH/ORB (Days)</b>				
Vacation Trips	6.6	6.5	6.8	7.1
Get-Away Trips	3.3	3.5	3.4	3.1
<b>Party Size (Immediate Travel Party)</b>	3.5	3.7	3.8	3.9
<b>Party Composition (Multiple Response)</b>				
Family	47.6%	49.6%	52.5%	45.3%
Couple	33.0	30.0	30.5	39.7
Group of Couples/Friends	15.2	16.9	14.9	18.2
Single	4.1	3.4	2.0	1.4
<b>Traveling with Children</b>				
Yes	46.3%	49.2%	50.6%	49.7%
No	53.7	50.8	49.4	50.3



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

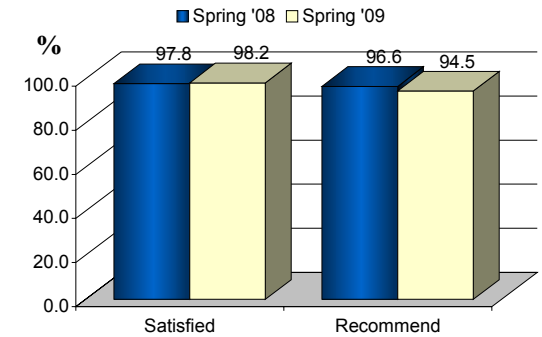
	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
<b>Who First Suggested Our Area for this Trip (Multiple Response)</b>				
Self	45.7%	48.2%	50.0%	49.4%
Family	27.8	23.3	21.2	19.2
Friend	10.9	12.8	15.2	19.0
Spouse/Companion	11.7	11.2	12.8	18.8
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% Female Suggesting	68.9%	68.4%	64.1%	63.5%
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<b>Other Beach Areas Considered (Multiple Response)</b>				
None	58.1%	52.2%	47.9%	50.8%
Florida	36.3	41.4	46.3	43.7
South Carolina	6.4	10.7	11.7	7.3
North Carolina	2.2	5.5	6.0	5.3
<hr/>				
<b>Why Choose GSH/ORB (Multiple Response)</b>				
Nice Beaches	44.7%	46.9%	48.9%	43.2%
Close to Home	34.3	31.5	37.5	41.4
Quiet/Laid Back	16.4	21.3	28.7	35.9
Familiar/Previous Visit	35.5	34.7	31.8	32.9
Safe Area	5.9	19.0	25.8	23.0
Reasonable Rates	11.4	15.5	19.7	22.5
Family Oriented	15.2	22.6	24.0	20.1
Food/Local Restaurants	13.4	19.4	17.7	19.2
Not Crowded/Commercial	10.5	14.9	13.2	18.4
Recommended by Friend/Relative	13.2	17.0	23.2	17.6
Beautiful	5.2	6.7	8.0	16.9
Accommodations	8.2	10.0	12.8	16.7
Weather	6.8	14.5	16.2	14.6
Nature/Environment	8.8	11.7	15.3	13.4
Shopping	8.4	12.3	14.1	10.5
Friend/Family in Area	6.9	9.8	7.4	9.0
Fishing	13.0	13.7	11.2	7.9
Golfing	10.0	10.5	9.1	7.3
<hr/>				
<b>Attractions Visited (Multiple Response)</b>				
Tanger Center	44.3%	50.9%	54.6%	49.3%
The Wharf	N/A	9.8	26.6	27.9
Gulf State Park	22.8	26.0	24.8	23.3
Fort Morgan	18.1	24.3	25.6	21.8
Alabama Gulf Coast Zoo	14.3	16.9	18.0	13.9
The Track	10.1	15.8	16.8	13.3
Pensacola Naval Museum	12.4	12.2	14.3	11.5
Mobile Bay Ferry	14.4	16.2	14.5	11.2
Bon Secour Wildlife Refuge	14.4	13.3	11.7	10.2
Battleship USS Alabama	8.3	10.9	11.5	8.8
None	17.4	14.4	18.5	20.6



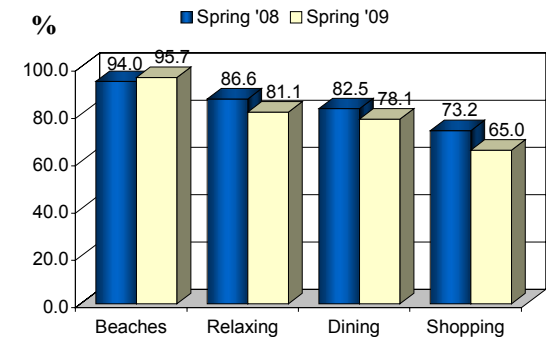
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	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
<b>Satisfaction with Area</b>				
Very Satisfied	70.7%	70.3%	75.3%	72.7%
Satisfied	<u>23.6</u>	<u>25.5</u>	<u>22.0</u>	<u>25.5</u>
<b>Satisfaction Level</b>	<b>94.3%</b>	<b>95.8%</b>	<b>97.8%</b>	<b>98.2%</b>
<b>Activities Enjoyed in Area (Multiple Response)</b>				
Beaches	96.9%	94.9%	94.0%	95.7%
Relaxing	86.2	85.7	86.6	81.1
Dining Out	88.4	87.8	82.5	78.1
Shopping	70.2	70.9	73.2	65.0
Sight Seeing	51.2	53.7	56.2	47.7
Pool	41.4	44.8	39.7	40.2
Attractions	36.9	39.4	44.3	38.7
Wildlife/Environment	25.0	29.0	26.5	28.5
Photography	14.7	18.0	21.3	20.4
Visiting Friends/Relatives	13.3	15.6	18.1	16.7
Miniature Golf	11.7	14.5	17.0	15.4
Golfing	13.9	15.0	16.0	14.8
Bars/Nightlife	11.4	12.0	13.5	13.9
Fishing	19.8	19.6	13.9	12.0
Bird Watching	6.9	7.4	11.6	9.7
Movies	6.8	9.5	10.2	6.8

Satisfaction/Recommend Gulf Shores/Orange Beach

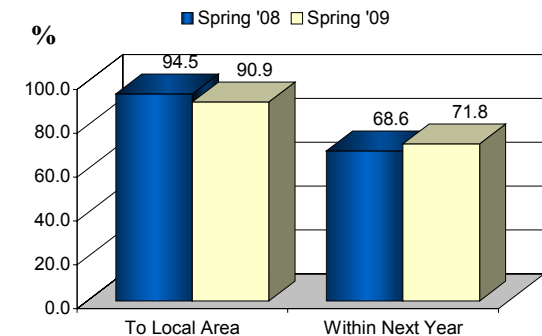


Activities Enjoyed (Top Four)



	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
<b>Recommend Area to Friends</b> (% Yes)	94.8%	95.0%	96.6%	94.5%
<b>Plan to Return (% Yes)</b>				
To Local Area	88.8%	90.1%	94.5%	90.9%
Next Year (Base: Return to Local Area)	72.2	71.1	68.6	71.8
<b>Median Age Head of Household (Years)</b>	49.5	48.2	47.9	46.4
<b>Median Annual Household Income *</b>	\$73,485	\$74,638	\$78,547	\$77,304

Plan to Return

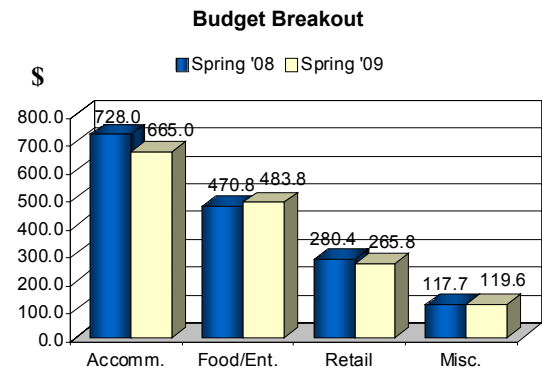


\* Please Note: Median Household Income After Taxes

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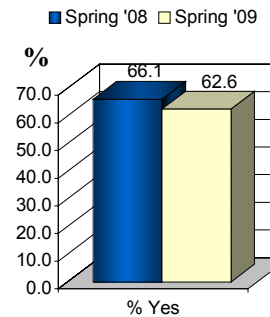
	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
<b>Visitor Party Budget</b> (GSH/ORB Stay: Food/Lodging/Entertainment)				
Total	\$1,508.57	\$1,638.89	\$1,650.01	\$1,580.76
Per Person/Trip	431.02	442.94	434.21	405.32
Per Person/Day	81.23	82.03	81.93	77.95

	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
<b>Visitor Party Budget Breakout</b> (GSH/ORB Stay)				
Accommodations	\$622.27	\$722.00	\$727.96	\$665.00
Food/Entertainment	442.01	469.41	470.77	483.78
Retail/Grocery	275.42	278.19	280.40	265.75
Miscellaneous Exp.	126.17	121.50	117.73	119.64

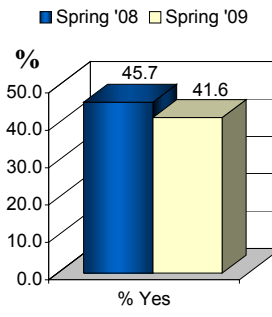


	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>Spring 2009</u>		
				<u>Total</u>	<u>First Time</u>	<u>Repeat</u>
<b>See/Read/Hear GSH/ORB Message</b>	63.1%	65.5%	66.1%	62.6%	76.3%	57.5%
<b>Type of Message Seen</b>						
Internet	70.2%	70.3%	75.1%	73.3%	77.8%	71.0%
Television	24.3	28.6	33.4	20.2	24.9	18.0
Brochure	25.7	24.9	26.8	19.5	25.3	16.6
Magazine Ad	29.4	29.2	25.2	18.5	18.4	18.5
Travel/Visitor Guide	20.9	18.5	15.6	11.3	19.9	7.1
Newspaper Ad	14.7	16.4	15.3	10.4	7.0	12.1
Newspaper Story	16.9	17.0	14.3	7.3	5.4	8.2
Radio	6.0	5.4	4.3	6.3	6.5	6.2
Magazine Story	12.2	8.6	5.7	4.6	5.4	4.2

**See/Hear/Read Message**

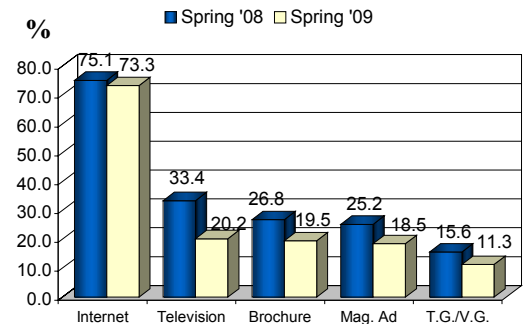


**Influenced by Message**



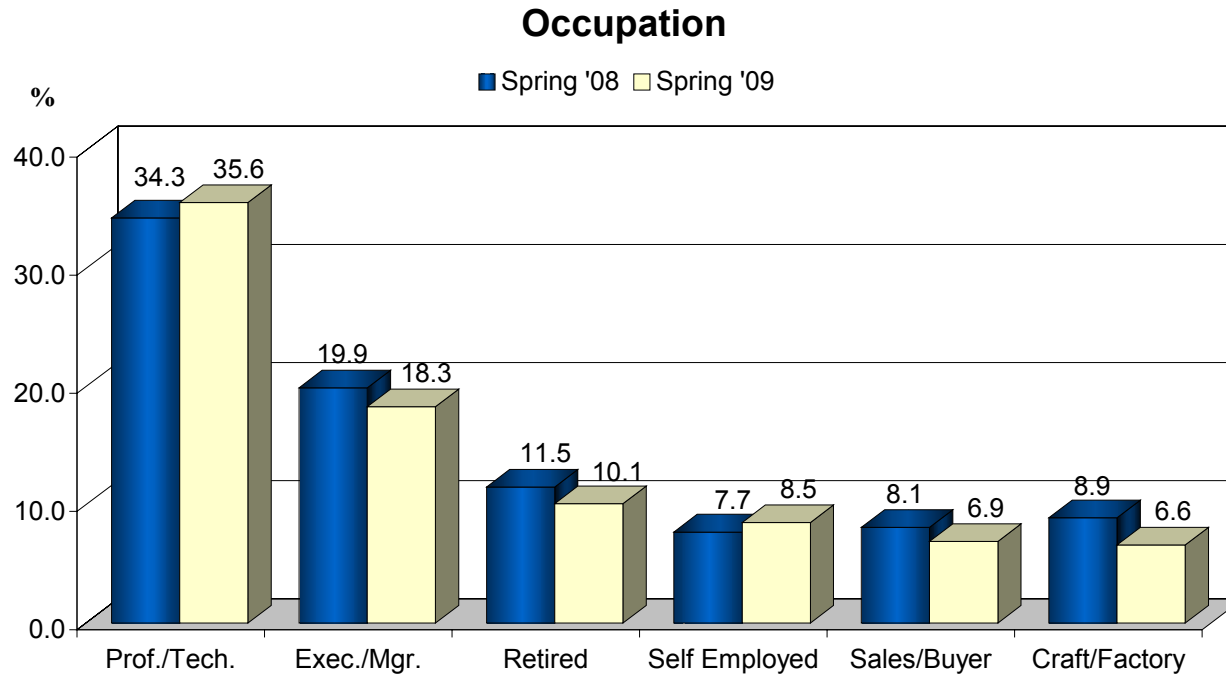
<b>Influenced by GSH/ORB Message</b> (Base: Respondents Reporting See/Read/Hear Message)	45.5%	44.2%	45.7%	41.6%	60.0%	32.5%
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**Type of Message Seen (Top Five)**



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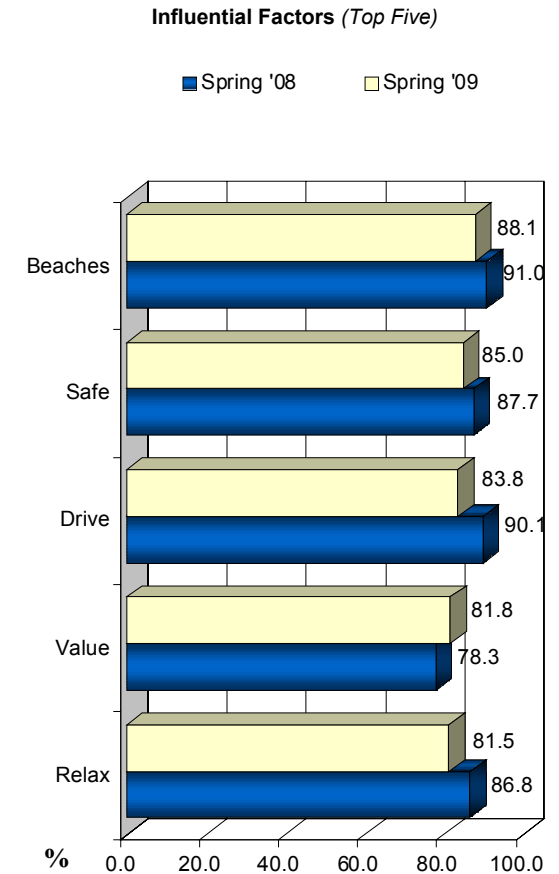
	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
<b>Likely or Very Likely to Combine a Gaming Trip to Mississippi with a Future Stay at GSH/ORB</b>	11.6%	12.9%	14.0%	13.4%
<b>Occupation</b>				
Professional/Technical	39.9%	37.6%	34.3%	35.6%
Executive/Managerial	16.6	17.9	19.9	18.3
Retired	13.9	11.1	11.5	10.1
Self Employed	4.3	6.9	7.7	8.5
Salesman/Buyer	4.0	6.2	8.1	6.9
Craft/Factory	9.7	9.9	8.9	6.6



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

### Influential Factors in Choosing GSH/ORB

	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
White, Sandy Beaches	91.8%	90.1%	91.0%	88.1%
Safe Destination	85.8	87.6	87.7	85.0
I Can Drive There With My Family	87.5	88.8	90.1	83.8
Good Value for the Money	82.4	81.5	78.3	81.8
Complete Relaxation	87.9	82.9	86.8	81.5
Family Atmosphere	73.9	74.8	78.1	77.0
Clean, Unspoiled Environment	80.0	78.4	79.1	75.9
Reasonably Priced Lodging	78.4	78.1	75.2	71.9
Good Restaurants/Dining Out	75.1	77.1	76.0	71.2
Warm Weather	76.3	76.6	72.9	70.9
Sunning on the Beach	76.7	70.9	70.0	66.4
Safe Beaches for Children	61.8	64.3	67.0	62.1
Uncommercialized Beaches	66.7	62.9	60.9	57.6
Upscale Accommodations	60.2	58.2	57.4	54.4
Shopping	48.0	48.8	46.9	48.3
Romantic Place	36.5	32.4	36.7	40.7
Good Golfing	14.7	16.1	15.4	13.6
Good Fishing	20.1	17.3	14.5	12.0
Good Boating	10.9	12.9	11.0	10.1



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

	<u>2008</u>	<u>2009</u>
<b>Requested Additional Information</b>		
<b>About Area for Trip (Multiple Response)</b>		
Did Not Request Information	35.5%	38.5%
Accessed www.gulfshores.com	39.5	37.5
Accessed Individual Hotel/Motel/Condominium Website	22.0	24.4
Accessed Destination Sites for Gulf Shores/Orange Beach	19.2	18.3
Accessed an On-Line Travel Agency Website	14.2	15.7
Called a Hotel/Motel/Condominium Toll-Free Number	6.8	9.3
Called the CVB Toll-Free Number	5.1	4.8
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<b>Have Access to the Internet</b>	94.1%	94.5%
<b>Seek Out Travel Information On-Line</b> (BASE: Those with Internet Access)	94.6%	92.2%
<b>Ever Book Reservations On-Line</b> (BASE: Those with Internet Access)	76.1%	75.1%
<b>Used the Internet to Gather Travel Information for this Trip</b> (BASE: Those who Seek Travel Information On-Line))	88.1%	86.0%
First Time	94.8	93.5
Repeat	84.8	82.9
<b>Booked Reservations for this Trip on the Internet</b> (BASE: Those who Seek Travel Information On-Line)	42.0%	44.2%
<b>Accessed the Website www.gulfshores.com</b> (BASE: Those who Seek Travel Information On-Line)	59.6%	56.6%
<hr/>		
<b>Sources of Information about Destination Once Arrive in Area</b> (Multiple Response)		
Don't Look for Information Once in Area	31.3%	32.8%
Visitor Guides	26.2	29.6
Front Desk Personnel	33.5	27.1
Local Information TV Channel	25.6	22.1
Visitor Welcome Centers	21.2	21.6
Internet	16.3	16.7
Waiters/Waitresses	17.2	15.5
PDA's/iPOD's/Navigation Systems	N/A	13.8
Maps	15.3	12.6

### Planning/Reservation Window Analysis Days to Arrival

