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Summer 2008 Visitor Profile Alabama Gulf Coast Convention & Visitors Bureau



Prepared for:

Alabama Gulf Coast Convention and Visitors Bureau

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President

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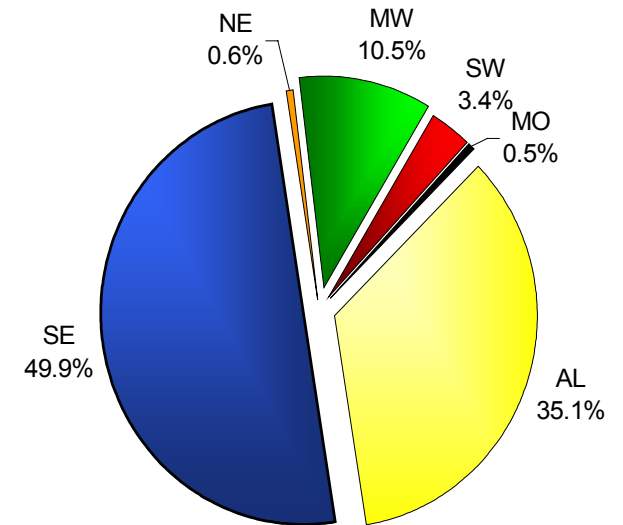
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October 13, 2008

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

	Summer '05	Summer '06	Summer '07	Summer '08	'07-'08 % Δ
Number of Visitors	375,260	505,240	549,570	555,380	+1.2
Visitor Expenditures	\$155,503,991	\$215,788,004	\$246,949,280	\$243,689,636	-1.3

2008 Regional Distribution of Visitors



Regional Visitor Distribution	Summer '05	Summer '06	Summer '07	Summer '08
Alabama	35.0%	37.1%	35.9%	35.1%
Southeast	47.0	48.1	48.8	49.9
Northeast	0.9	0.6	0.8	0.6
Midwest	10.6	8.6	9.7	10.5
Southwest	6.0	5.1	4.1	3.4
Markets of Opportunity	0.5	0.5	0.7	0.5
Total	100.0%	100.0%	100.0%	100.0%

	Summer 2005		Summer 2006		Summer 2007		Summer 2008	
	Occ.	Rm. Nights	Occ.	Rm. Nights	Occ.	Rm. Nights	Occ.	Rm. Nights
Lodging Occupancy								
Condominium Market	66.3%	325,003	63.3%	471,843	68.1%	511,540	68.6%	518,465
Hotel/Motel Market	77.0	104,892	81.9	115,659	82.9	124,774	76.4	116,608

	Summer 2005	Summer 2006	Summer 2007	Summer 2008
Average Daily Rate				
Condominium Market	\$187.16	\$186.14	\$214.70	\$209.96
Hotel/Motel Market	144.34	155.29	161.44	168.14

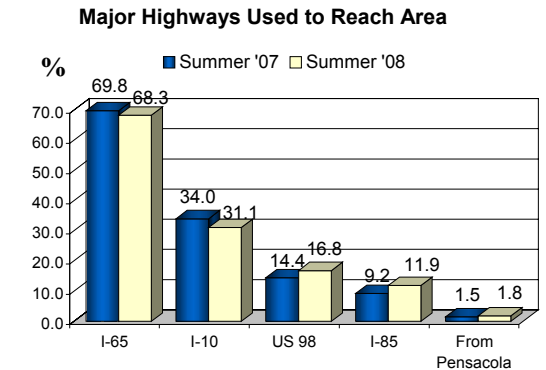
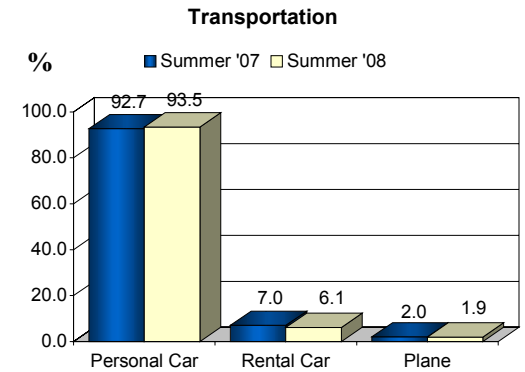
TOP U.S. FEEDER MARKETS

Core Origin Markets		Summer 2005		Summer 2006		Summer 2007		Summer 2008
'08 Rank		%	'05 Rank	%	'06 Rank	%	'07 Rank	%
1.	Birmingham	16.1%	1	16.3%	1	17.3%	1	16.8%
2.	Huntsville/Decatur	11.5	2	12.2	2	8.6	2	11.0
3.	Atlanta	8.9	3	7.8	3	7.0	4	7.4
4.	Nashville	3.9	6	5.7	4	8.0	3	7.1
5.	Memphis	2.9	10	5.0	5	5.3	5	6.1
6.	Montgomery	3.5	7	3.8	7	4.7	6	3.5
7.	New Orleans	7.9	4	3.5	9	3.1	9	3.2
8.	Mobile	5.2	5	4.1	6	3.9	7	2.8
9.	Jackson, MS	**	**	**	**	**	**	2.6
10.	Baton Rouge	3.1	8	3.3	10	2.9	10	2.3

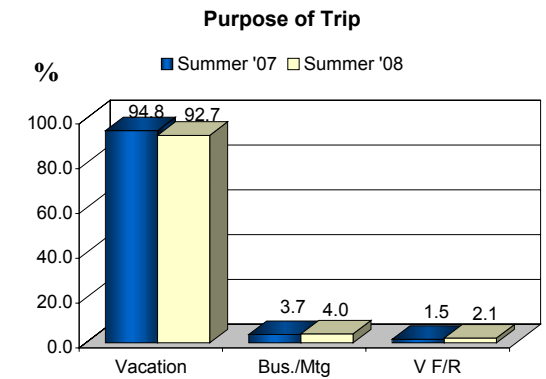
** Please Note: Not in Top Ten Listing

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

	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Transportation Mode				
Personal Car	96.7%	92.5%	92.7%	93.5%
Rental Car	2.1	6.0	7.0	6.1
Plane	1.4	1.8	2.0	1.9
Major Highways Used to Reach Area				
Interstate 65	63.9%	68.6%	69.8%	68.3%
Interstate 10	38.2	29.8	34.0	31.1
U.S. Highway 98	17.5	15.4	14.4	16.8
Interstate 85	9.0	7.3	9.2	11.9
From Pensacola	1.1	2.5	1.5	1.8



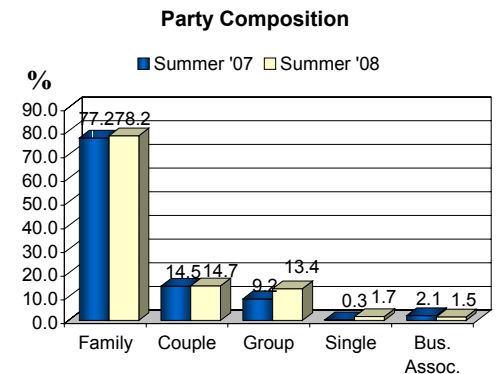
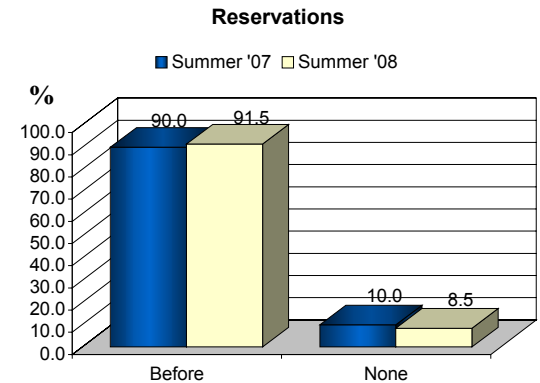
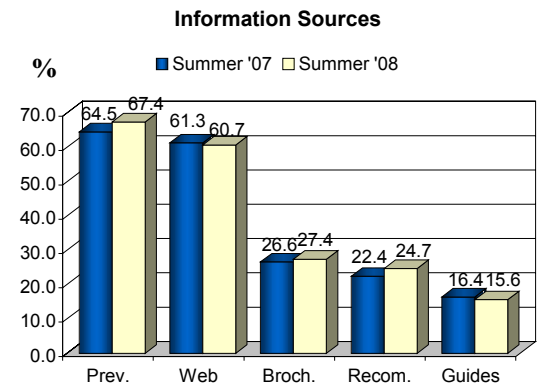
	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Purpose of Trip (Primary Reason)				
Vacation	94.7%	93.8%	94.8%	92.7%
Business/Meeting/Conference	0.7	2.2	3.7	4.0
Visit Friends/Relatives	4.5	1.2	1.5	2.1



	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
First Visit to Gulf Shores/Orange Beach	15.4%	22.7%	30.6%	29.6%

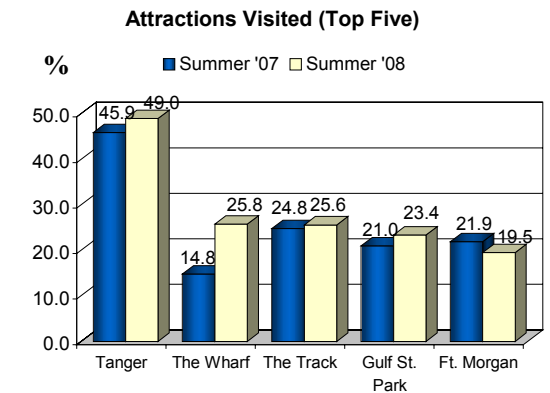
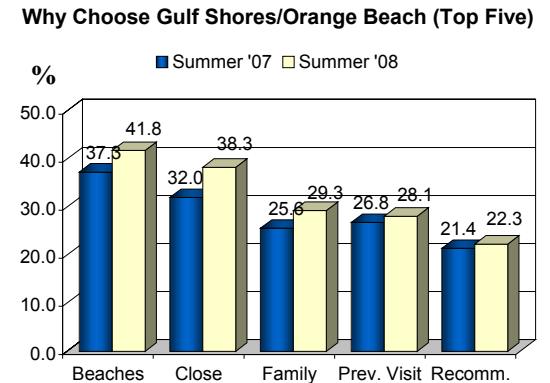
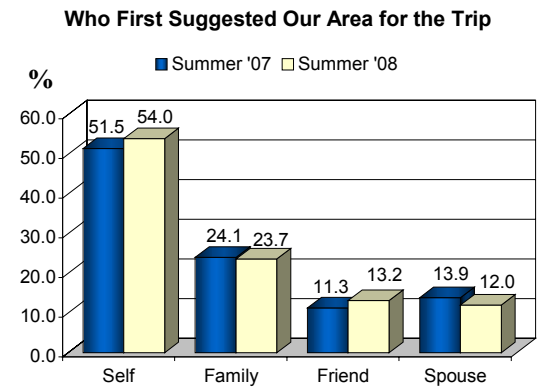
Summer 2008 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Average Repeat Visits to GSH/ORB over past 5 years (Base: Repeat Visitors)	5.2 trips	3.8 trips	4.0 trips	3.9 trips
Information Sources (Multiple Response)				
Internet	40.7%	59.1%	64.5%	67.4%
Previous Visit	72.1	65.7	61.3	60.7
Brochures	16.6	26.1	26.6	27.4
Recommendation by Friend/Relative	24.6	21.5	22.4	24.7
Vacation/Travel Guides	10.6	10.1	16.4	15.6
Convention and Visitors Bureau	5.7	8.4	9.3	7.1
Assisted by Travel Agent	2.7%	3.4%	1.4%	2.1%
Reservations				
Before Arriving in Area	97.0%	90.1%	90.0%	91.5%
None	3.0	9.9	10.0	8.5
	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Length of Stay in GSH/ORB (days)				
Get-away Trips	3.6	3.5	3.1	3.2
Vacation Trips	6.2	6.3	6.6	6.5
Party Size (Immediate Travel Party)	4.2	4.3	4.4	4.5
Party Composition (Multiple Response)				
Family	74.1%	78.5%	77.2%	78.2%
Couple	18.1	17.1	14.5	14.7
Group of Couples/Friends	6.1	11.3	9.2	13.4
Single	1.1	0.5	0.3	1.7
With Business Associates	N/A	0.9	2.1	1.5
Traveling with Children				
Yes	74.1%	81.4%	76.2%	77.0%
No	25.9	18.6	23.8	23.0



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	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Who First Suggested Our Area for this Trip (Multiple Response)				
Self	40.5%	50.8%	51.5%	54.0%
Family	37.0	28.0	24.1	23.7
Friend	12.3	13.2	11.3	13.2
Spouse/Companion	15.1	11.1	13.9	12.0
<hr/>				
% Female Recommending	68.3%	67.0%	69.8%	69.5%
Other Beach Areas Considered (Multiple Response)				
Florida	43.3%	54.8%	51.1%	58.1%
South Carolina	5.3	9.6	12.9	11.8
North Carolina	2.7	4.7	6.2	8.2
Georgia	4.1	5.5	6.8	5.8
None	48.4	39.9	36.9	33.6
Why Choose GSH/ORB (Multiple Response)				
Nice Beaches	27.5%	36.2%	37.3%	41.8%
Close to Home	29.7	34.4	32.0	38.3
Family Oriented	20.9	26.5	25.6	29.3
Previous Visit	36.0	31.2	26.8	28.1
Recommended	8.1	15.8	21.4	22.3
Accommodations	9.4	14.3	15.9	19.8
Reasonable Rates	6.1	11.3	14.5	19.3
Quiet/Laid Back	5.3	12.0	15.0	18.2
Clean	4.1	16.1	16.2	17.4
Safe Area	0.4	15.3	14.6	16.7
Never Been	4.2	6.8	14.8	13.5
Not Crowded/Commercial	5.6	10.7	13.6	11.5
Attractions Visited (Multiple Response)				
Tanger Center	43.6%	43.4%	45.9%	49.0%
The Wharf	N/A	N/A	14.8	25.8
The Track	26.6	27.2	24.8	25.6
Gulf State Park	11.7	20.2	21.0	23.4
Fort Morgan	22.3	19.5	21.9	19.5
Waterville	12.8	18.5	18.9	15.8
Alabama Gulf Coast Zoo	N/A	13.9	18.3	14.3
Battleship USS Alabama	4.1	8.0	11.8	11.1
Pensacola Naval Museum	6.1	8.6	11.6	10.4
Dauphin Island	8.4	10.6	11.8	8.6
None	23.0	15.0	16.0	15.0



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	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Satisfaction with GSH/ORB				
Very Satisfied	68.8%	72.0%	69.6%	71.3%
Satisfied	<u>23.2</u>	<u>19.8</u>	<u>23.3</u>	<u>22.4</u>
Satisfaction Level	92.0%	91.8%	92.9%	93.7%

Activities Enjoyed in GSH/ORB

(Multiple Response)

Beaches	98.5%	97.7%	94.6%	97.6%
Relaxing	89.9	84.8	83.4	85.0
Dining Out	75.6	86.5	80.9	84.0
Shopping	71.5	65.7	65.1	65.3
Pool	53.2	57.1	53.4	54.8
Sight Seeing	32.5	39.8	45.9	50.7
Attractions	26.0	36.3	39.5	41.1
Photography	11.1	18.7	22.0	25.9
Wildlife/Environment	8.5	15.8	26.3	24.4
Miniature Golf	24.4	21.5	23.3	19.7
Fishing	19.1	19.6	20.7	19.5
Visiting Friends/Relatives	15.2	15.4	17.0	14.4
Bars/Night Life	11.0	11.1	11.2	13.7
Seafood	8.9	10.4	12.6	11.0
Movies	9.6	8.1	12.0	10.4
Golfing	15.9	9.8	11.9	8.5

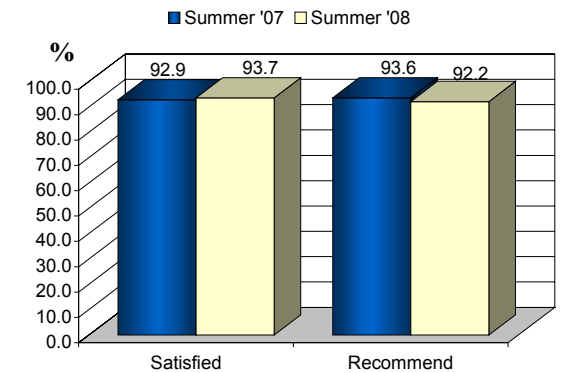
	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Recommend GSH/ORB to Friends/Relatives				
(% yes)	94.6%	91.1%	93.6%	92.2%

Plan to Return (% yes)

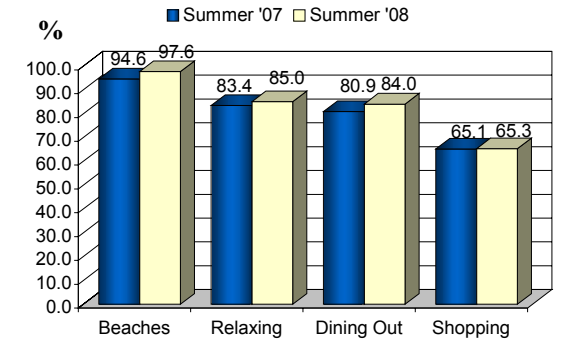
To Local Area	88.2%	88.7%	89.2%	88.9%
Next Year (BASE: All Respondents)	61.7	57.7	59.1	55.7

Median Age Head of Household (years)	46.2	44.3	43.7	44.8
Median Annual Household Income	\$77,000	\$79,205	\$83,051	\$85,588

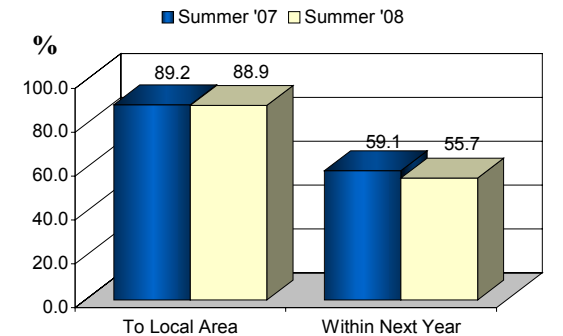
Satisfaction/Recommend Gulf Shores/Orange Beach



Activities Enjoyed (Top Four)



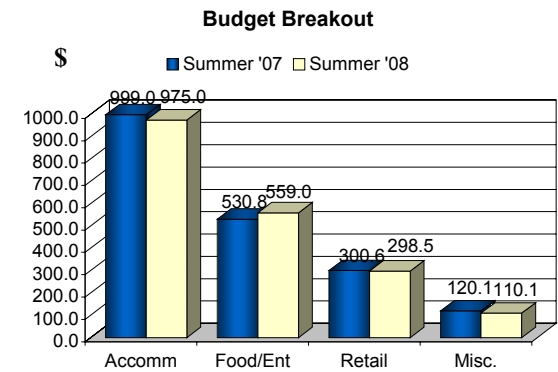
Plan to Return



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	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Visitor Party Budget (GSH/ORB Stay: Food/Lodging/Entertainment)				
Total	\$1,740.43	\$1,836.54	\$1,977.12	\$1,974.49
Per Person/Trip	414.39	427.10	449.35	438.78
Per Person/Day	81.25	80.59	83.21	82.79

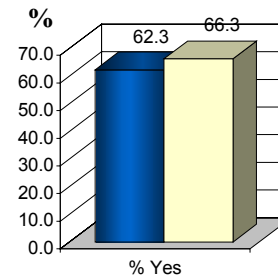
	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Visitor Party Budget Breakout (GSH/ORB Stay)				
Accommodations	\$819.00	\$864.35	\$998.96	\$975.00
Food/Entertainment	470.82	495.86	530.80	559.03
Retail/Grocery	276.56	291.38	300.64	298.53
Miscellaneous Exp.	109.66	116.55	120.14	110.08



	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>Summer 2008</u>		
See/Read/Hear GSH/ORB Message	55.0%	61.4%	62.3%	<u>All</u>	<u>First Time</u>	<u>Repeat</u>
				66.3%	67.1%	66.0%

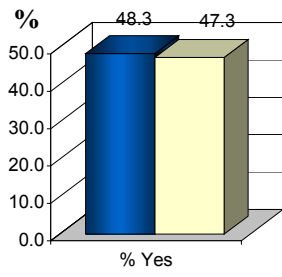
See/Hear/Read Message

■ Summer '07 □ Summer '08



Influenced by Message

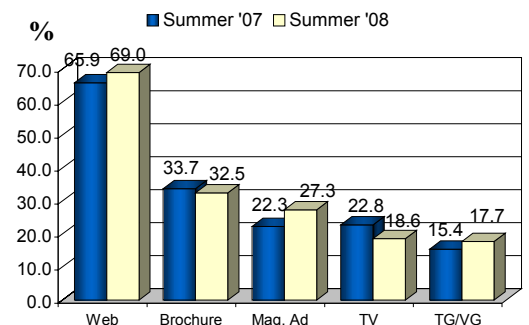
■ Summer '07 □ Summer '08



	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>Summer 2008</u>		
Type of Message Seen (BASE: Respondents Reporting See/Read/Hear Message)(Multiple Response)				<u>All</u>	<u>First Time</u>	<u>Repeat</u>
Internet	59.7%	63.7%	65.9%	69.0%	78.5%	65.0%
Brochure	28.9	34.8	33.7	32.5	42.2	28.4
Magazine Ad	27.1	20.2	22.3	27.3	20.7	30.2
Television	28.8	24.3	22.8	18.6	17.4	19.1
Travel/Visitor Guide	13.8	16.5	15.4	17.7	29.9	12.5
Magazine Story	13.1	9.1	11.6	10.9	9.0	11.7
Newspaper Story	21.2	10.4	11.2	9.2	2.6	12.1
Newspaper Ad	11.6	6.7	8.8	8.2	7.9	8.3
Radio	1.4	12.2	8.8	7.0	3.1	8.7
Billboards	3.4	3.1	5.9	4.9	3.5	5.4

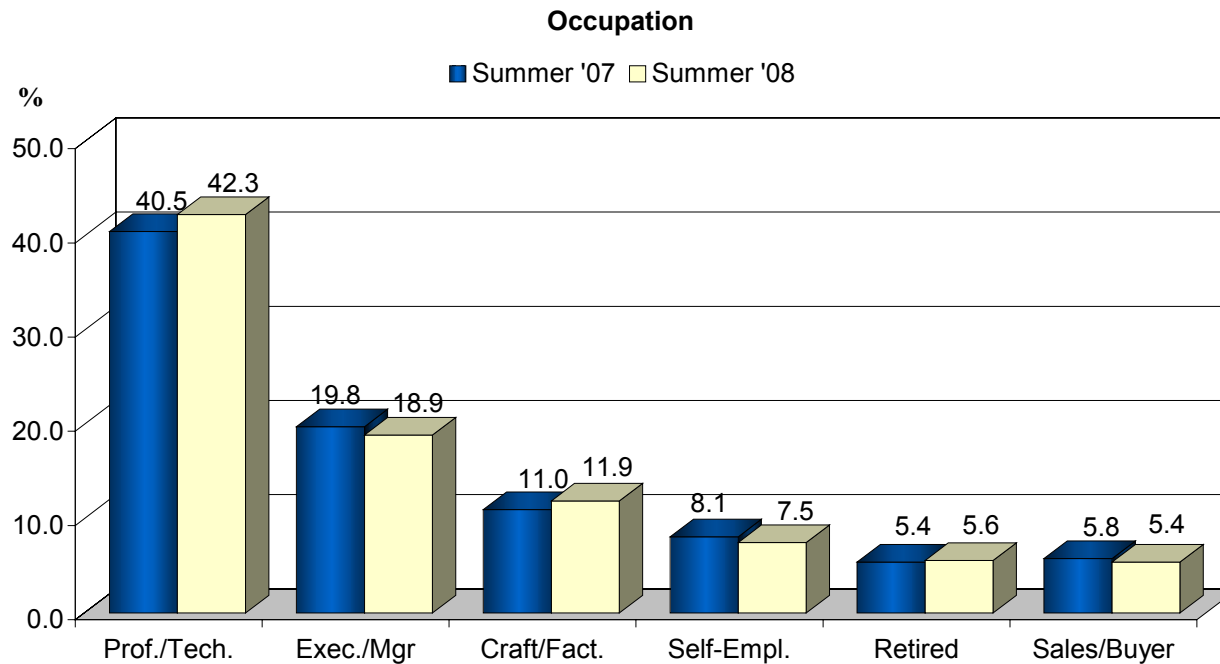
	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>Summer 2008</u>		
Influenced by GSH/ORB Message (BASE: Respondents Reporting See/Read/Hear Message)	47.6%	46.2%	48.3%	<u>All</u>	<u>First Time</u>	<u>Repeat</u>
				47.3%	66.2%	39.3%

Type of Message Seen (Top Five)



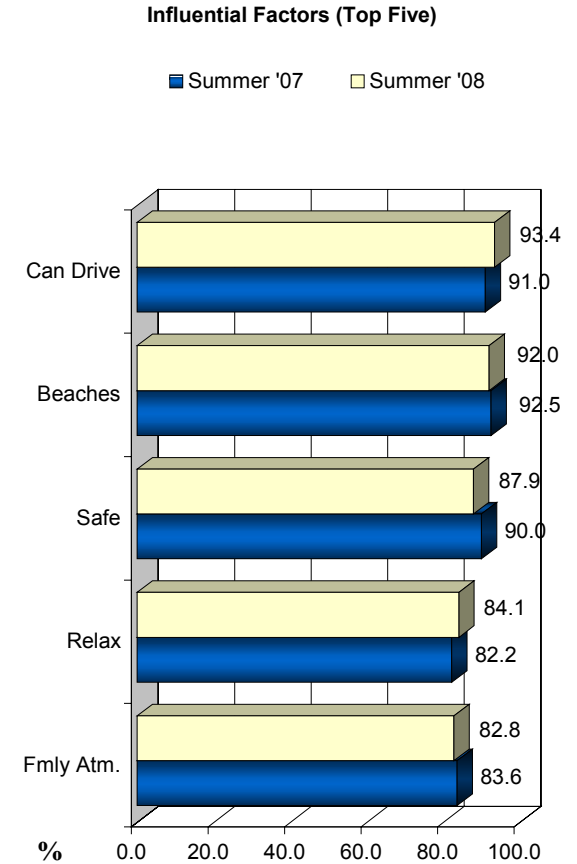
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Occupation	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Professional/Technical	43.0%	42.4%	40.5%	42.3%
Executive/Managerial	18.0	16.0	19.8	18.9
Craft/Factory	13.4	14.6	11.0	11.9
Self-Employed	3.2	5.6	8.1	7.5
Retired	7.4	6.2	5.4	5.6
Salesman/Buyer	10.4	7.2	5.8	5.4



Influential Factors in Choosing Gulf Shores/Orange Beach

	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
I Can Drive There With My Family	92.0%	91.9%	91.0%	93.4%
White, Sandy Beaches	93.6	92.7	92.5	92.0
Safe Destination	79.9	87.0	90.0	87.9
Complete Relaxation	89.0	84.5	82.2	84.1
Family Atmosphere	89.1	86.3	83.6	82.8
Sunning on the Beach	83.1	79.9	74.9	76.8
Good Value for the Money	79.3	78.8	77.3	76.7
Safe Beaches for Children	75.7	78.5	74.6	76.0
Clean, Unspoiled Environment	71.7	73.0	76.0	75.3
Reasonably Priced Lodging	79.5	75.9	73.5	74.5
Warm Weather	70.7	75.2	76.4	73.1
Good Family Restaurants	78.2	74.7	70.6	73.1
Uncommercialized Beaches	61.1	65.3	64.5	67.0
Upscale Accommodations	65.9	61.3	57.0	58.0
Romantic Place	30.9	32.7	32.5	34.9
Good Fishing	15.5	20.1	21.7	20.7
Good Golfing	14.2	13.5	15.6	16.6
Good Boating	14.0	12.2	13.2	12.4



Important Visitation Motivators:

- ❖ A safe, beautiful environment for my family.
- ❖ A true family destination.
- ❖ Beautiful and fun.
- ❖ Brother's family likes to go there. Wanted to vacation with them.
- ❖ Came so we could see dolphins.
- ❖ Came to the area last summer and enjoyed it so much. Had an even better time this year.
- ❖ Change from Myrtle Beach and wanted my daughter and granddaughter to see Gulf Shores.
- ❖ Clean, with great shopping and restaurants.
- ❖ Close to Foley shopping.
- ❖ Close to home, because of gas prices.
- ❖ Condo had a lazy river and waterslide meaning we did not have to go anywhere else for these things.
- ❖ Condo offered a free night.
- ❖ Different.
- ❖ Dining out.
- ❖ Dogs are allowed on the beach in Fort Morgan and the house was clean.
- ❖ Every one I talked to loved it there.
- ❖ Family oriented.
- ❖ Fun, safe place.
- ❖ Gas prices and deals to help with gas
- ❖ Good value for dollar.
- ❖ Great food, nice beaches, great views from condo, and not far to drive.
- ❖ Great kids activities and attractions.
- ❖ I wanted somewhere I could drive with my daughters and relax.
- ❖ It's a beautiful place.
- ❖ Just wanted to go somewhere to relax and to listen to the waves.
- ❖ Just wanted to try the Gulf Coast after experiencing the Atlantic Ocean beaches.
- ❖ Love the white sand beaches.
- ❖ Condo had a great web page - most helpful in sending materials.
- ❖ My father could come with us in his RV and it wasn't a long drive.
- ❖ Not another beach like it that we have been to.
- ❖ Not as commercialized as Florida beaches.
- ❖ Not taken over by big corporations, NO CASINOS!
- ❖ People visiting are mostly families. Not as much partying as other locations.
- ❖ Seemed like a great place so we came here to relax.
- ❖ Short drive
- ❖ Something new.
- ❖ Somewhere other than Florida.
- ❖ The drive is 90% interstate.
- ❖ There are no casinos. That's what I like. It's safer.
- ❖ Wanted to stay on the Gulf side, ocean view.
- ❖ Wanted to visit "The little zoo that could."
- ❖ Was looking for a nice place to bury my feet in the sand with a cold drink in my hand.
- ❖ We decided that Orange Beach was a great location for a family get together.
- ❖ Wildlife.
- ❖ Within a reasonable driving distance.

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	<u>2007</u>	<u>2008</u>
Have Access to the Internet	98.0%	98.9%
Seek Out Travel Information On-Line (BASE: Those with Internet Access)	92.4%	93.2%
Ever Book Reservations On-Line (BASE: Those with Internet Access)	77.8%	77.2%
Used the Internet to Gather Travel Information for this Trip (BASE: Those who Seek Travel Information On-Line)	91.3%	91.5%
First Time	96.3%	97.4%
Repeat	89.2	89.2
Booked Reservations for this Trip on the Internet (BASE: Those who Seek Travel Information On-Line)	49.6%	48.5%
Accessed the Website www.gulfshores.com (BASE: Those who Seek Travel Information On-Line)	50.9%	49.7%

	<u>2007</u>	<u>2008</u>
Requested Information About Area for Trip (Multiple Response)		
Did not request information	37.2%	40.8%
Accessed www.gulfshores.com	36.6	37.2
Accessed individual hotel/motel/condominium website	29.8	32.5
Accessed destination sites for Gulf Shores/Orange Beach	20.9	22.6
Accessed an on-line travel agency website	11.6	12.1
Called a hotel/motel/condominium toll-free number	11.8	10.7
Called the CVB toll-free number	4.3	3.9

Sources of Information About Destination Once Arrive in Area

	<u>2007</u>	<u>2008</u>
Sources of Information About Destination Once Arrive in Area (Multiple Response)		
Front desk personnel	32.9%	35.5%
Visitor guides	28.3	31.6
Local information TV channel	14.7	17.7
Visitor welcome centers	19.2	17.0
Internet	11.8	16.2
Maps	14.5	15.5
Waiters/waitresses	14.3	15.1
Don't look for information once in area	33.1	32.4

Planning/Reservation Window Analysis Days to Arrival

