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Summer 2009 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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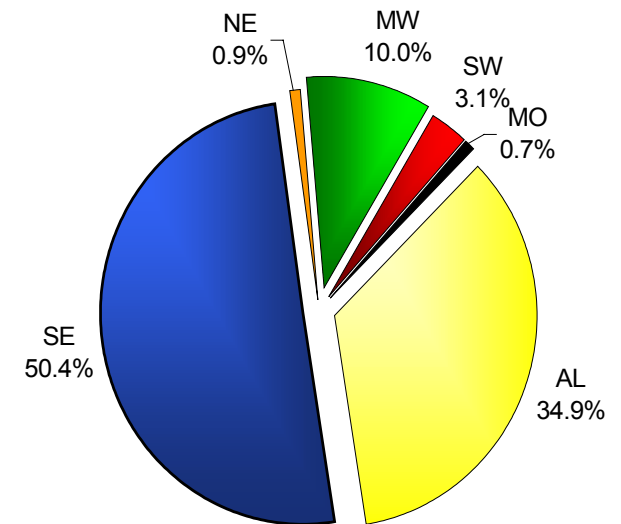
www.KlagesGroup.com

November 2009

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

	Summer '06	Summer '07	Summer '08	Summer '09	'08-'09 % Δ
Number of Visitors	505,240	549,570	555,380	574,100	+3.4
Visitor Expenditures	\$215,788,004	\$246,949,280	\$243,689,636	\$241,162,187	-1.0

2009 Regional Distribution of Visitors



Regional Visitor Distribution	Summer '06	Summer '07	Summer '08	Summer '09
Alabama	37.1%	35.9%	35.1%	34.9%
Southeast	48.1	48.8	49.9	50.4
Northeast	0.6	0.8	0.6	0.9
Midwest	8.6	9.7	10.5	10.0
Southwest	5.1	4.1	3.4	3.1
Markets of Opportunity	0.5	0.7	0.5	0.7
Total	100.0%	100.0%	100.0%	100.0%

	Summer 2006		Summer 2007		Summer 2008		Summer 2009	
	Occ.	Rm. Nights	Occ.	Rm. Nights	Occ.	Rm. Nights	Occ.	Rm. Nights
Lodging Occupancy								
Condominium Market	63.3%	471,843	68.1%	511,540	68.6%	518,465	67.2%	531,081
Hotel/Motel Market	81.9	115,659	82.9	124,774	76.4	116,608	73.6	132,309

Average Daily Rate	Summer 2006	Summer 2007	Summer 2008	Summer 2009
	Condominium Market	\$186.14	\$214.70	\$209.96
Hotel/Motel Market	155.29	161.44	168.14	164.69

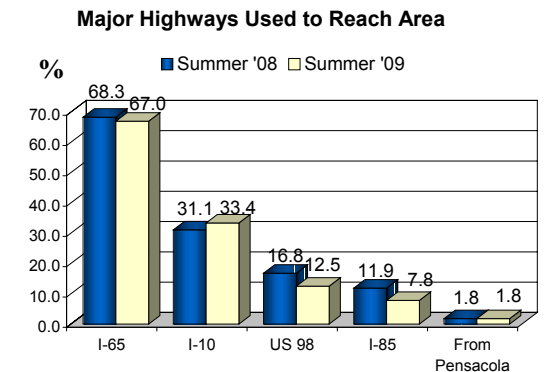
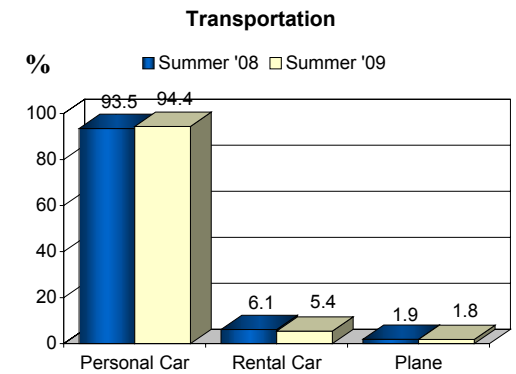
TOP U.S. FEEDER MARKETS

Core Origin Markets		Summer 2006		Summer 2007		Summer 2008		Summer 2009
'09 Rank		%	'06 Rank	%	'07 Rank	%	'08 Rank	%
1.	Birmingham	16.3%	1	17.3%	1	16.8%	1	17.8%
2.	Huntsville/Decatur	12.2	2	8.6	2	11.0	2	9.4
3.	Nashville	5.7	4	8.0	3	7.1	4	7.8
4.	Atlanta	7.8	3	7.0	4	7.4	3	6.4
5.	Memphis	5.0	5	5.3	5	6.1	5	5.8
6.	New Orleans	3.5	9	3.1	9	3.2	7	3.8
7.	Montgomery	3.8	7	4.7	6	3.5	6	3.2
8.	Baton Rouge	3.3	10	2.9	10	2.3	10	3.0
9.	Jackson, MS	**	**	**	**	2.6	9	2.8
10.	Mobile	4.1	6	3.9	7	2.8	8	2.6
11.	Tuscaloosa	**	**	**	**	**	**	2.6

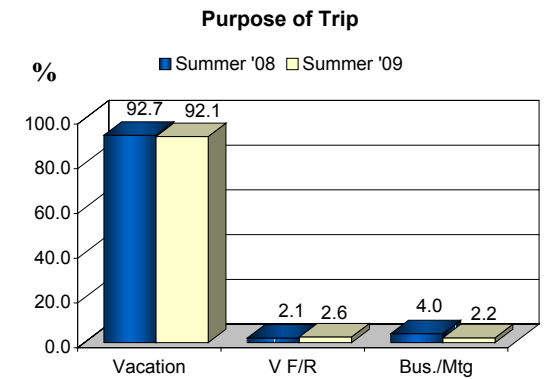
** Please Note: Not in Top Ten Listing

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

	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Transportation Mode				
Personal Car/RV	92.5%	92.7%	93.5%	94.4%
Rental Car	6.0	7.0	6.1	5.4
Plane	1.8	2.0	1.9	1.8
Major Highways Used to Reach Area				
Interstate 65	68.6%	69.8%	68.3%	67.0%
Interstate 10	29.8	34.0	31.1	33.4
U.S. Highway 98	15.4	14.4	16.8	12.5
Interstate 85	7.3	9.2	11.9	7.8
From Pensacola	2.5	1.5	1.8	1.8



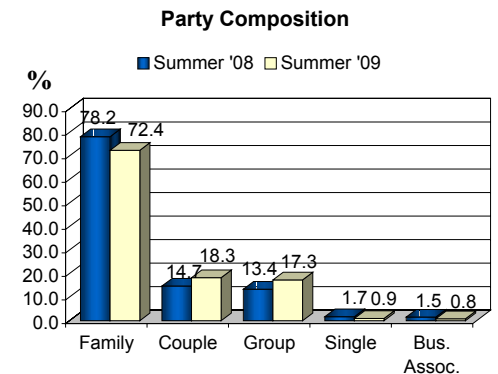
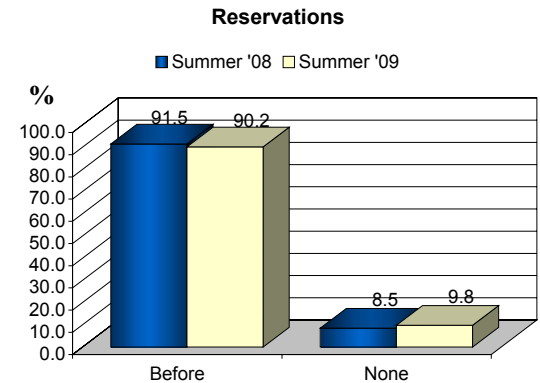
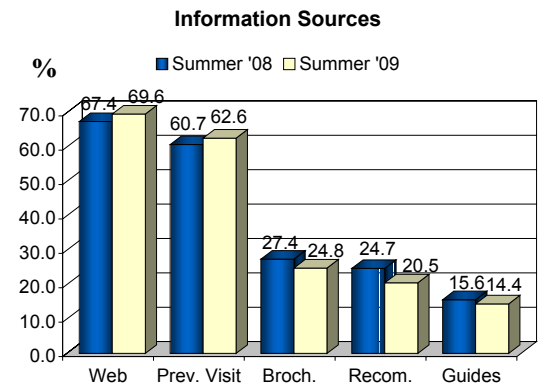
	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Purpose of Trip (Primary Reason)				
Vacation	93.8%	94.8%	92.7%	92.1%
Visit Friends/Relatives	1.2	1.5	2.1	2.6
Business/Meeting/Conference	2.2	3.7	4.0	2.2



	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
First Visit to Gulf Shores/Orange Beach	22.7%	30.6%	29.6%	27.9%

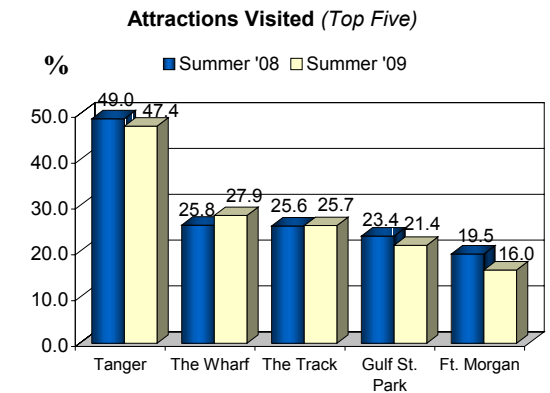
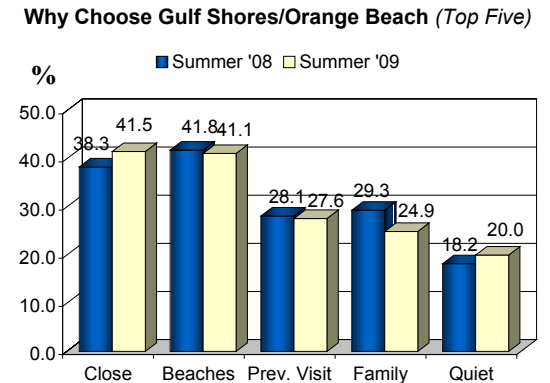
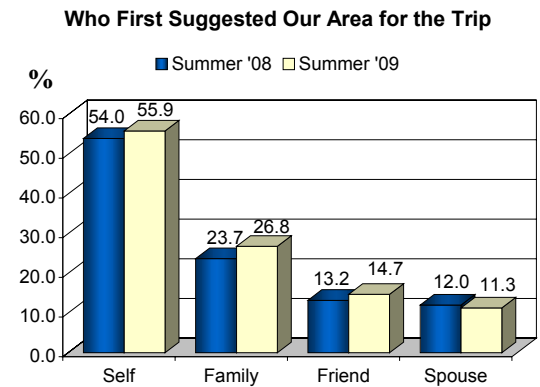
Summer 2009 Visitor Profile and Occupancy Statistics -- Alabama Gulf Coast Convention & Visitors Bureau

	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Average Repeat Visits to GSH/ORB over past 5 years (Base: Repeat Visitors)	3.8 trips	4.0 trips	3.9 trips	4.0 trips
Information Sources (Multiple Response)				
Internet	59.1%	64.5%	67.4%	69.6%
Previous Visit	65.7	61.3	60.7	62.6
Brochures	26.1	26.6	27.4	24.8
Recommendation by Friend/Relative	21.5	22.4	24.7	20.5
Vacation/Travel Guides	10.1	16.4	15.6	14.4
Convention and Visitors Bureau	8.4	9.3	7.1	7.0
Assisted by Travel Agent	3.4%	1.4%	2.1%	2.9%
Reservations				
Before Arriving in Area	90.1%	90.0%	91.5%	90.2%
None	9.9	10.0	8.5	9.8
	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Length of Stay in GSH/ORB (days)				
Get-away Trips	3.5	3.1	3.2	3.3
Vacation Trips	6.3	6.6	6.5	6.4
Party Size (Immediate Travel Party)	4.3	4.4	4.5	4.5
Party Composition (Multiple Response)				
Family	78.5%	77.2%	78.2%	72.4%
Couple	17.1	14.5	14.7	18.3
Group of Couples/Friends	11.3	9.2	13.4	17.3
Single	0.5	0.3	1.7	0.9
With Business Associates	0.9	2.1	1.5	0.8
Traveling with Children				
Yes	81.4%	76.2%	77.0%	70.8%
No	18.6	23.8	23.0	29.2



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	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Who First Suggested Our Area for this Trip (Multiple Response)				
Self	50.8%	51.5%	54.0%	55.9%
Family	28.0	24.1	23.7	26.8
Friend	13.2	11.3	13.2	14.7
Spouse/Companion	11.1	13.9	12.0	11.3
<hr/>				
% Female Recommending	67.0%	69.8%	69.5%	65.4%
Other Beach Areas Considered (Multiple Response)				
Florida	54.8%	51.1%	58.1%	53.4%
South Carolina	9.6	12.9	11.8	9.2
North Carolina	4.7	6.2	8.2	5.8
Mississippi	6.4	4.3	5.0	5.0
Georgia	5.5	6.8	5.8	3.3
None	39.9	36.9	33.6	38.7
Why Choose GSH/ORB (Multiple Response)				
Close to Home	34.4%	32.0%	38.3%	41.5%
Nice Beaches	36.2	37.3	41.8	41.1
Previous Visit	31.2	26.8	28.1	27.6
Family Oriented	26.5	25.6	29.3	24.9
Quiet/Laid Back	12.0	15.0	18.2	20.0
Reasonable Rates	11.3	14.5	19.3	18.3
Recommended	15.8	21.4	22.3	17.1
Accommodations	14.3	15.9	19.8	16.5
Clean	16.1	16.2	17.4	15.8
Safe Area	15.3	14.6	16.7	14.8
Never Been	6.8	14.8	13.5	13.7
Not Crowded/Commercial	10.7	13.6	11.5	13.3
Attractions Visited (Multiple Response)				
Tanger Center	43.4%	45.9%	49.0%	47.4%
The Wharf	N/A	14.8	25.8	27.9
The Track	27.2	24.8	25.6	25.7
Gulf State Park	20.2	21.0	23.4	21.4
Fort Morgan	19.5	21.9	19.5	16.0
Waterville	18.5	18.9	15.8	13.6
Alabama Gulf Coast Zoo	13.9	18.3	14.3	10.4
Battleship USS Alabama	8.0	11.8	11.1	10.3
Dauphin Island	10.6	11.8	8.6	8.3
Pensacola Naval Museum	8.6	11.6	10.4	8.1
None	15.0	16.0	15.0	17.7



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	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Satisfaction with GSH/ORB				
Very Satisfied	72.0%	69.6%	71.3%	70.1%
Satisfied	19.8	23.3	22.4	25.3
Satisfaction Level	91.8%	92.9%	93.7%	95.4%

Activities Enjoyed in GSH/ORB

(Multiple Response)

Beaches	97.7%	94.6%	97.6%	97.8%
Relaxing	84.8	83.4	85.0	83.3
Dining Out	86.5	80.9	84.0	82.0
Shopping	65.7	65.1	65.3	62.3
Pool	57.1	53.4	54.8	51.8
Sight Seeing	39.8	45.9	50.7	46.7
Attractions	36.3	39.5	41.1	39.6
Wildlife/Environment	15.8	26.3	24.4	24.0
Photography	18.7	22.0	25.9	23.7
Miniature Golf	21.5	23.3	19.7	18.9
Fishing	19.6	20.7	19.5	17.0
Visiting Friends/Relatives	15.4	17.0	14.4	16.0
Seafood	10.4	12.6	11.0	12.7
Bars/Night Life	11.1	11.2	13.7	12.1
Golfing	9.8	11.9	8.5	11.5
Movies	8.1	12.0	10.4	7.4

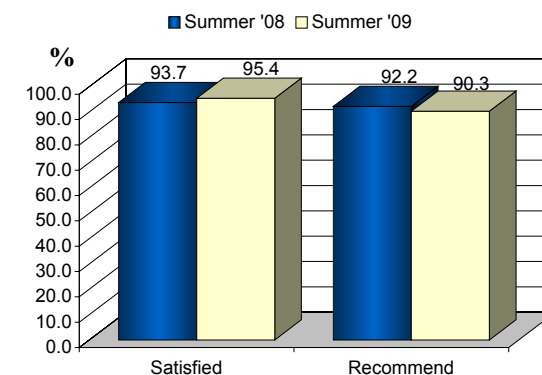
	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Recommend GSH/ORB to Friends/Relatives				
(% yes)	91.1%	93.6%	92.2%	90.3%

Plan to Return (% yes)

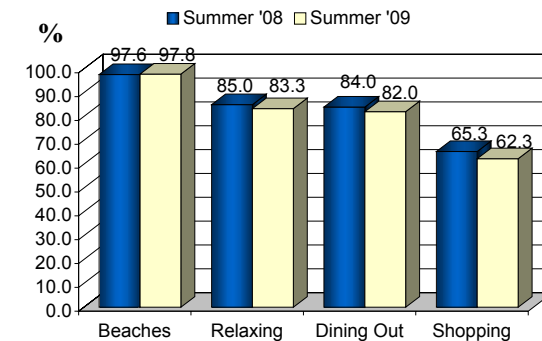
To Local Area	88.7%	89.2%	88.9%	89.9%
Next Year (BASE: All Respondents)	57.7	59.1	55.7	59.2

Median Age Head of Household (years)	44.3	43.7	44.8	44.3
Median Annual Household Income	\$79,205	\$83,051	\$85,588	\$83,453

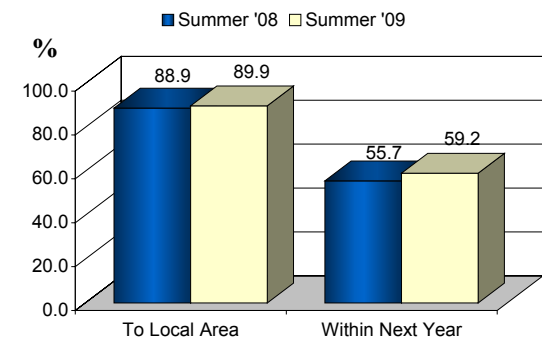
Satisfaction/Recommend Gulf Shores/Orange Beach



Activities Enjoyed (Top Four)



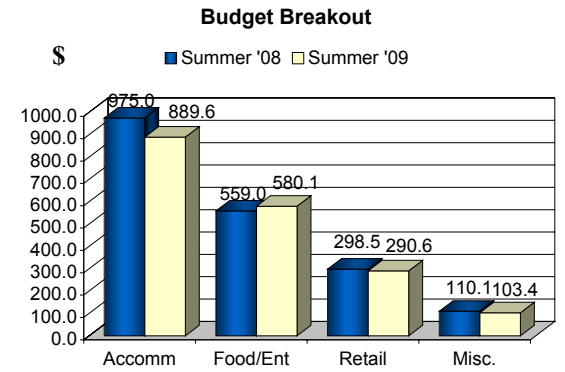
Plan to Return



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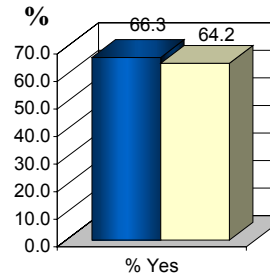
	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Visitor Party Budget (GSH/ORB Stay: Food/Lodging/Entertainment)				
Total	\$1,836.54	\$1,977.12	\$1,974.49	\$1,890.32
Per Person/Trip	427.10	449.35	438.78	420.07
Per Person/Day	80.59	83.21	82.79	80.78

	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Visitor Party Budget Breakout (GSH/ORB Stay)				
Accommodations	\$864.35	\$998.96	\$975.00	\$889.60
Food/Entertainment	495.86	530.80	559.03	580.12
Retail/Grocery	291.38	300.64	298.53	290.63
Miscellaneous Exp.	116.55	120.14	110.08	103.39

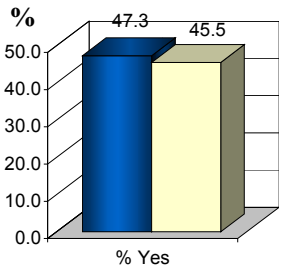


	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>Summer 2009</u>		
				<u>All</u>	<u>First Time</u>	<u>Repeat</u>
See/Read/Hear GSH/ORB Message	61.4%	62.3%	66.3%	64.2%	66.6%	63.2%

See/Hear/Read Message
■ Summer '08 □ Summer '09



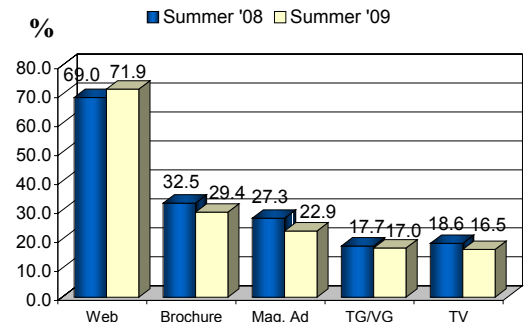
Influenced by Message
■ Summer '08 □ Summer '09



	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>Summer 2009</u>		
				<u>All</u>	<u>First Time</u>	<u>Repeat</u>
Type of Message Seen (BASE: Respondents Reporting See/Read/Hear Message)(Multiple Response)						
Internet	63.7%	65.9%	69.0%	71.9%	81.9%	67.9%
Brochure	34.8	33.7	32.5	29.4	43.3	23.7
Magazine Ad	20.2	22.3	27.3	22.9	22.4	23.1
Travel/Visitor Guide	16.5	15.4	17.7	17.0	26.1	13.3
Television	24.3	22.8	18.6	16.5	15.5	16.9
Magazine Story	9.1	11.6	10.9	7.9	7.2	8.1
Newspaper Ad	6.7	8.8	8.2	7.7	8.8	7.2
Newspaper Story	10.4	11.2	9.2	6.1	4.3	6.8
Billboards	3.1	5.9	4.9	4.6	4.1	4.8

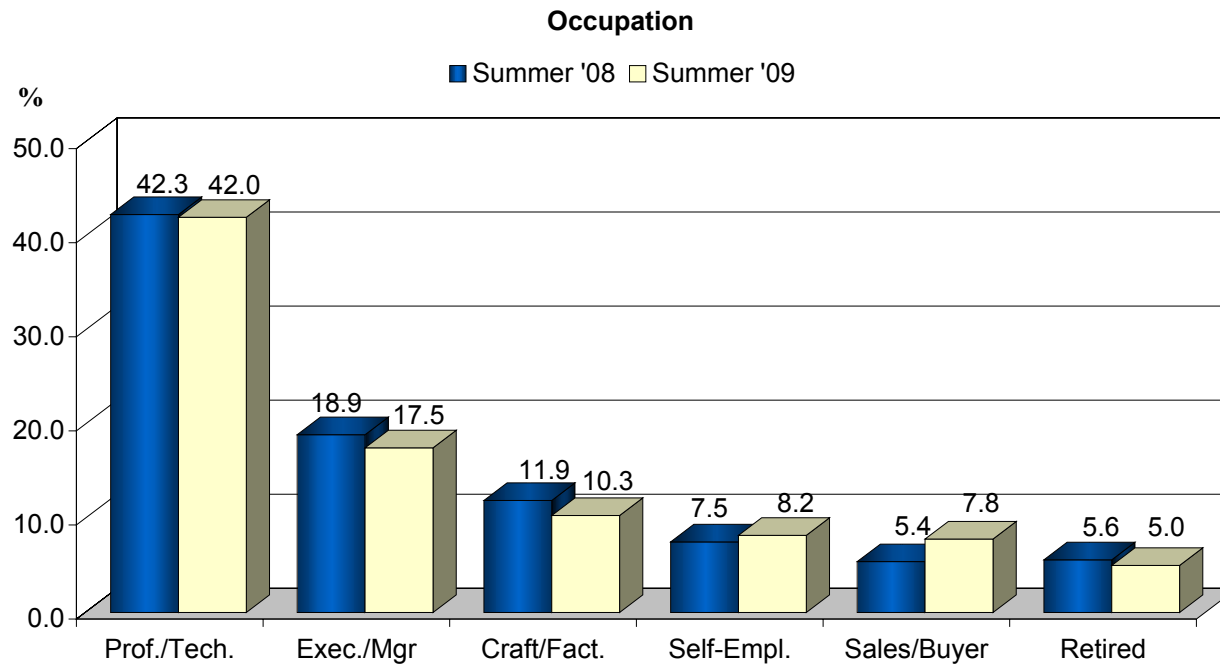
	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>Summer 2009</u>		
				<u>All</u>	<u>First Time</u>	<u>Repeat</u>
Influenced by GSH/ORB Message (BASE: Respondents Reporting See/Read/Hear Message)	46.2%	48.3%	47.3%	45.5%	68.7%	36.0%

Type of Message Seen (Top Five)
■ Summer '08 □ Summer '09



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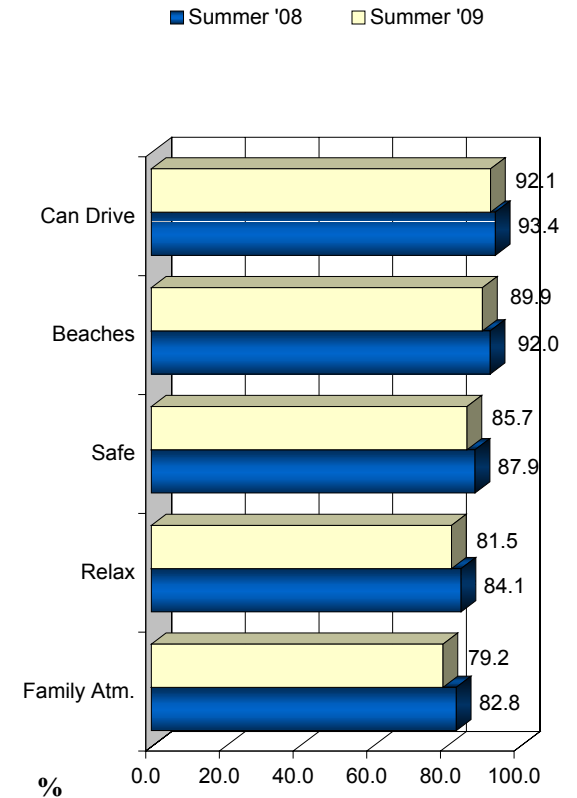
Occupation	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Professional/Technical	42.4%	40.5%	42.3%	42.0%
Executive/Managerial	16.0	19.8	18.9	17.5
Craft/Factory	14.6	11.0	11.9	10.3
Self-Employed	5.6	8.1	7.5	8.2
Salesman/Buyer	7.2	5.8	5.4	7.8
Retired	6.2	5.4	5.6	5.0



Influential Factors in Choosing Gulf Shores/Orange Beach

	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
I Can Drive There With My Family	91.9%	91.0%	93.4%	92.1%
White, Sandy Beaches	92.7	92.5	92.0	89.9
Safe Destination	87.0	90.0	87.9	85.7
Complete Relaxation	84.5	82.2	84.1	81.5
Family Atmosphere	86.3	83.6	82.8	79.2
Clean, Unspoiled Environment	73.0	76.0	75.3	77.8
Sunning on the Beach	79.9	74.9	76.8	77.2
Good Family Restaurants	74.7	70.6	73.1	74.4
Good Value for the Money	78.8	77.3	76.7	72.7
Safe Beaches for Children	78.5	74.6	76.0	72.4
Warm Weather	75.2	76.4	73.1	70.8
Reasonably Priced Lodging	75.9	73.5	74.5	70.0
Uncommercialized Beaches	65.3	64.5	67.0	66.2
Upscale Accommodations	61.3	57.0	58.0	54.8
Shopping	40.4	48.8	42.7	46.4
Romantic Place	32.7	32.5	34.9	32.0
Good Fishing	20.1	21.7	20.7	18.1
Good Golfing	13.5	15.6	16.6	16.1
Good Boating	12.2	13.2	12.4	12.6

Influential Factors (Top Five)



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	<u>2008</u>	<u>2009</u>
Have Access to the Internet	98.9%	98.2%
Seek Out Travel Information On-Line (BASE: Those with Internet Access)	93.2%	94.4%
Ever Book Reservations On-Line (BASE: Those with Internet Access)	77.2%	79.0%
Used the Internet to Gather Travel Information for this Trip (BASE: Those who Seek Travel Information On-Line)	91.5%	91.9%
First Time	97.4%	96.3%
Repeat	89.2	90.1
Booked Reservations for this Trip on the Internet (BASE: Those who Seek Travel Information On-Line)	48.5%	47.0%
Accessed the Website www.gulfshores.com (BASE: Those who Seek Travel Information On-Line)	49.7%	52.6%

	<u>2008</u>	<u>2009</u>
Requested Information About Area for Trip (Multiple Response)		
Accessed www.gulfshores.com	37.2%	39.1%
Accessed individual hotel/motel/condominium website	32.5	36.0
Accessed destination sites for Gulf Shores/Orange Beach	22.6	21.0
Called a hotel/motel/condominium toll-free number	10.7	12.4
Accessed an on-line travel agency website	12.1	11.7
Called the CVB toll-free number	3.9	3.2
Did not request information	40.8	38.6

	<u>2008</u>	<u>2009</u>
Sources of Information About Destination Once Arrive in Area (Multiple Response)		
Visitor guides	31.6%	32.9%
Front desk personnel	35.5	32.2
Internet	16.2	18.6
Visitor welcome centers	17.0	17.6
Maps	15.5	17.2
Local information TV channel	17.7	15.8
Waiters/waitresses	15.1	12.1
Don't look for information once in area	32.4	29.6

Planning/Reservation Window Analysis
Days to Arrival

