

Gulf Shores & Orange Beach Tourism
DESTINATION GROWTH INDICATORS
DECEMBER 2011

	2009	2010	2011	% Var.	2010	2011	% Var.
Hotel Occupancy Rate	14.5%	17.4%	16.8%	15.5%			
Hotel Average Daily Rate	\$81.18	\$84.16	\$70.60	-13.0%			
Hotel RevPAR	\$11.78	\$14.62	\$11.83	0.4%			
Condo Occupancy Rate	12.7%	14.9%	10.4%	-18.2%			
Condo Average Daily Rate	\$65.12	\$63.66	\$74.98	15.1%			
Condo RevPAU	\$8.26	\$9.51	\$7.78	-5.8%			
		November 2009	November 2011	% Var.	YTD FY '09	YTD FY '11	% Var.
Taxable Retail Sales		\$24,694,902	\$30,748,364	24.5%	\$536,842,889	\$597,794,314	11.4%
Taxable Lodging Rentals		\$5,131,814	\$6,363,610	24.0%	\$236,637,170	\$278,187,569	17.6%

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Gulf Shores & Orange Beach Tourism
HOTEL OCCUPANCY SUMMARY
Gulf Shores & Orange Beach, Alabama

	Occupancy Rate					Average Daily Rate					Revenue per Available Room				
	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012
DEC	19.9%	18.5%	14.5%	17.4%	16.8%	\$84.44	\$82.93	\$81.18	\$84.16	\$70.60	\$16.79	\$15.36	\$11.78	\$14.62	\$11.83
JAN	23.3%	22.6%	19.3%	23.3%	0.0%	\$74.50	\$62.95	\$57.49	\$73.65	\$0.00	\$17.38	\$14.25	\$11.11	\$17.18	\$0.00
FEB	<u>44.0%</u>	<u>45.7%</u>	<u>41.7%</u>	<u>41.6%</u>	<u>0.0%</u>	<u>\$86.84</u>	<u>\$82.27</u>	<u>\$75.43</u>	<u>\$84.11</u>	<u>\$0.00</u>	<u>\$38.20</u>	<u>\$37.58</u>	<u>\$31.42</u>	<u>\$35.01</u>	<u>\$0.00</u>
WINTER	28.7%	28.8%	25.0%	26.4%	16.8%	\$82.85	\$77.82	\$72.52	\$80.83	\$70.60	\$23.80	\$22.40	\$18.11	\$21.37	\$11.83
MAR	59.4%	49.3%	52.7%	59.9%	0.0%	\$124.19	\$116.45	\$117.10	\$118.87	\$0.00	\$73.83	\$57.39	\$61.70	\$71.22	\$0.00
APR	53.5%	52.3%	58.9%	67.7%	0.0%	\$127.61	\$132.55	\$128.88	\$130.69	\$0.00	\$68.27	\$69.36	\$75.87	\$88.46	\$0.00
MAY	<u>69.2%</u>	<u>65.3%</u>	<u>68.9%</u>	<u>65.3%</u>	<u>0.0%</u>	<u>\$150.21</u>	<u>\$142.36</u>	<u>\$123.04</u>	<u>\$149.47</u>	<u>\$0.00</u>	<u>\$103.90</u>	<u>\$92.98</u>	<u>\$84.74</u>	<u>\$97.56</u>	<u>\$0.00</u>
SPRING	60.8%	55.3%	59.8%	64.3%	0.0%	\$135.14	\$131.12	\$123.15	\$133.41	\$0.00	\$82.14	\$72.49	\$73.66	\$85.72	\$0.00
JUN	85.0%	81.6%	63.1%	83.3%	0.0%	\$169.49	\$165.73	\$147.34	\$175.02	\$0.00	\$144.04	\$135.27	\$93.00	\$145.85	\$0.00
JUL	86.6%	80.4%	68.3%	92.1%	0.0%	\$188.43	\$187.24	\$141.05	\$191.40	\$0.00	\$163.22	\$150.45	\$96.40	\$176.34	\$0.00
AUG	<u>58.0%</u>	<u>57.4%</u>	<u>45.2%</u>	<u>59.8%</u>	<u>0.0%</u>	<u>\$152.28</u>	<u>\$147.76</u>	<u>\$121.01</u>	<u>\$140.17</u>	<u>\$0.00</u>	<u>\$88.34</u>	<u>\$84.79</u>	<u>\$54.75</u>	<u>\$83.76</u>	<u>\$0.00</u>
SUMMER	76.4%	73.1%	59.7%	78.4%	0.0%	\$172.32	\$168.98	\$138.85	\$172.56	\$0.00	\$131.73	\$123.45	\$82.86	\$135.21	\$0.00
SEP	44.0%	50.4%	56.3%	50.0%	0.0%	\$114.10	\$110.30	\$114.44	\$121.38	\$0.00	\$50.15	\$55.55	\$64.41	\$60.67	\$0.00
OCT	48.2%	43.1%	54.1%	49.9%	0.0%	\$115.26	\$108.53	\$112.24	\$117.33	\$0.00	\$55.51	\$46.78	\$60.73	\$58.55	\$0.00
NOV	<u>25.5%</u>	<u>25.7%</u>	<u>27.3%</u>	<u>23.9%</u>	<u>0.0%</u>	<u>\$89.50</u>	<u>\$86.96</u>	<u>\$91.40</u>	<u>\$94.74</u>	<u>\$0.00</u>	<u>\$22.84</u>	<u>\$22.33</u>	<u>\$24.97</u>	<u>\$22.67</u>	<u>\$0.00</u>
FALL	39.3%	39.7%	45.9%	41.7%	0.0%	\$109.32	\$104.67	\$109.00	\$114.97	\$0.00	\$42.97	\$41.60	\$50.04	\$47.97	\$0.00
ANNUAL	51.8%	49.6%	47.8%	53.3%	16.8%	\$137.48	\$132.73	\$118.13	\$138.53	\$70.60	\$71.17	\$65.82	\$56.46	\$73.87	\$11.83

GULF SHORES & ORANGE BEACH TOURISM
OCCUPANCY SUMMARY
HOTELS/MOTELS
2011

	NUMBER	RM.NIT.	OCCUPANCY RATES			AVERAGE DAILY RATES		
	REP'T.	RENTED	TOTAL	HIGH	LOW	TOTAL	HIGH	LOW
JAN	6	5,759	23.3%	36.6%	7.2%	\$73.65	\$88.10	\$50.64
FEB	5	8,239	41.6%	64.7%	20.0%	\$84.11	\$104.18	\$68.50
MAR	6	14,786	59.9%	89.8%	32.9%	\$118.87	\$136.00	\$91.10
APR	6	16,154	67.7%	90.4%	46.1%	\$130.69	\$144.00	\$91.11
MAY	6	16,126	65.3%	88.7%	48.0%	\$149.47	\$164.00	\$110.61
JUN	6	19,925	83.3%	99.9%	62.3%	\$175.02	\$202.00	\$113.53
JUL	6	22,764	92.1%	99.5%	82.3%	\$191.40	\$240.61	\$127.86
AUG	6	14,764	59.8%	89.0%	39.8%	\$140.17	\$159.13	\$101.21
SEP	6	11,938	50.0%	73.6%	34.6%	\$121.38	\$140.00	\$100.44
OCT	5	10,937	49.9%	81.2%	29.2%	\$117.33	\$149.00	\$87.77
NOV	5	5,061	23.9%	38.6%	10.7%	\$94.74	\$106.00	\$76.11
DEC	5	3,673	16.8%	34.1%	4.2%	\$70.60	\$132.66	\$65.94
ANNUAL	68	150,126	53.6%	72.5%	37.0%	\$138.43	\$149.60	\$104.70

**Gulf Shores & Orange Beach Tourism
CONDOMINIUM OCCUPANCY SUMMARY
Gulf Shores & Orange Beach, Alabama**

	Occupancy Rate					Average Daily Rate					Revenue per Available Unit				
	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012
DEC	14.1%	11.9%	12.7%	14.9%	10.4%	\$64.62	\$58.80	\$65.12	\$63.66	\$74.98	\$9.10	\$7.00	\$8.26	\$9.51	\$7.78
JAN	47.4%	40.3%	46.9%	43.8%	0.0%	\$39.49	\$39.31	\$40.17	\$43.64	\$0.00	\$18.73	\$15.83	\$18.85	\$19.12	\$0.00
FEB	65.5%	65.0%	72.0%	58.2%	0.0%	\$47.26	\$48.93	\$52.30	\$53.11	\$0.00	\$30.94	\$31.78	\$37.64	\$30.91	\$0.00
WINTER	45.2%	38.0%	42.6%	38.7%	10.4%	\$45.68	\$46.53	\$49.33	\$50.94	\$74.98	\$20.63	\$17.70	\$21.03	\$19.73	\$7.78
MAR	57.3%	48.5%	51.6%	45.8%	0.0%	\$107.51	\$87.47	\$93.43	\$111.16	\$0.00	\$61.60	\$42.42	\$48.20	\$50.86	\$0.00
APR	27.6%	32.3%	33.9%	36.5%	0.0%	\$140.43	\$143.67	\$134.36	\$145.65	\$0.00	\$38.81	\$46.36	\$45.55	\$53.12	\$0.00
MAY	41.4%	37.7%	36.5%	45.8%	0.0%	\$176.17	\$158.71	\$167.62	\$182.12	\$0.00	\$72.95	\$59.78	\$61.24	\$83.40	\$0.00
SPRING	41.6%	45.4%	40.8%	42.7%	0.0%	\$139.03	\$125.27	\$126.16	\$147.27	\$0.00	\$57.88	\$49.53	\$51.47	\$62.88	\$0.00
JUN	74.0%	71.8%	44.3%	73.1%	0.0%	\$218.48	\$202.21	\$197.33	\$239.88	\$0.00	\$161.71	\$145.27	\$87.36	\$175.30	\$0.00
JUL	76.3%	79.5%	41.5%	87.8%	0.0%	\$233.79	\$215.60	\$183.78	\$253.52	\$0.00	\$178.48	\$171.34	\$76.33	\$222.64	\$0.00
AUG	52.1%	53.6%	26.7%	46.6%	0.0%	\$160.29	\$148.90	\$125.11	\$176.44	\$0.00	\$83.49	\$79.87	\$33.46	\$82.16	\$0.00
SUMMER	67.8%	68.7%	37.6%	69.2%	0.0%	\$209.96	\$194.40	\$175.50	\$231.41	\$0.00	\$142.25	\$133.59	\$66.03	\$160.07	\$0.00
SEP	27.4%	34.7%	30.7%	32.5%	0.0%	\$102.70	\$107.30	\$105.19	\$132.84	\$0.00	\$28.16	\$37.27	\$32.26	\$43.22	\$0.00
OCT	28.9%	31.6%	34.6%	31.5%	0.0%	\$102.03	\$91.30	\$94.89	\$116.61	\$0.00	\$29.49	\$28.85	\$32.87	\$36.69	\$0.00
NOV	14.9%	15.8%	18.0%	15.9%	0.0%	\$73.94	\$77.04	\$70.88	\$79.17	\$0.00	\$11.04	\$12.20	\$12.74	\$12.59	\$0.00
FALL	23.8%	28.0%	28.4%	26.3%	0.0%	\$96.49	\$95.93	\$94.71	\$115.05	\$0.00	\$22.97	\$26.86	\$26.89	\$30.21	\$0.00
ANNUAL	44.8%	44.0%	37.5%	44.6%	10.4%	\$140.64	\$131.38	\$111.76	\$158.66	\$74.98	\$63.05	\$57.77	\$41.89	\$70.73	\$7.78

**Gulf Shores & Orange Beach Tourism
 CONDOMINIUM OCCUPANCY SUMMARY
 RENTAL MGT. COMPANIES
 2011**

	NUMBER	RM.NIT.	OCCUPANCY RATES			AVERAGE DAILY RATES		
	REPT.	RENTED	TOTAL	HIGH	LOW	TOTAL	HIGH	LOW
JAN	5	52,191	43.8%	54.0%	30.4%	\$43.64	\$52.44	\$35.71
FEB	5	68,598	58.2%	62.7%	38.1%	\$53.11	\$59.10	\$41.67
MAR	6	61,076	45.8%	53.0%	23.0%	\$111.16	\$187.01	\$64.10
APR	6	49,774	36.5%	46.0%	15.0%	\$145.65	\$166.30	\$108.30
MAY	6	65,574	45.8%	52.5%	27.9%	\$182.12	\$305.00	\$142.93
JUN	6	103,651	73.1%	82.8%	37.7%	\$239.88	\$376.00	\$191.00
JUL	6	129,015	87.8%	98.4%	71.9%	\$253.52	\$420.00	\$192.00
AUG	6	67,850	46.6%	53.0%	29.0%	\$176.44	\$308.00	\$123.00
SEP	6	45,004	32.5%	40.0%	10.9%	\$132.84	\$224.00	\$107.21
OCT	6	42,698	31.5%	38.0%	9.4%	\$116.61	\$200.00	\$97.64
NOV	6	24,174	15.9%	18.5%	5.8%	\$79.17	\$176.00	\$58.00
DEC	6	17,167	10.4%	13.3%	6.8%	\$74.98	\$124.00	\$47.28
ANNUAL	70	726,772	43.4%	47.4%	29.0%	\$159.06	\$1,534.14	\$118.83

**Gulf Shores & Orange Beach Tourism
TAXABLE RETAIL SALES**

Gulf Shores, Orange Beach, Ft. Morgan

Source: Cities' Revenue Department

	2007	VAR.	2008	VAR.	2009	VAR.	2010	VAR.	2011	VAR.
DEC	\$41,874,608	-12.5%	\$32,822,636	-21.6%	\$29,132,478	-11.2%	\$25,065,550	-14.0%	\$27,566,472	10.0%
JAN	\$33,199,869	-11.2%	\$28,243,994	-14.9%	\$23,396,042	-17.2%	\$23,489,081	0.4%	\$25,179,841	7.2%
FEB	\$38,985,795	0.7%	\$30,703,531	-21.2%	\$30,931,261	0.7%	\$28,016,166	-9.4%	\$32,756,282	16.9%
WINTER	\$114,060,272	-8.0%	\$91,770,161	-19.5%	\$83,459,781	-9.1%	\$76,570,797	-8.3%	\$85,502,594	11.7%
MAR	\$55,606,515	-0.4%	\$51,418,914	-7.5%	\$43,316,033	-15.8%	\$45,557,328	5.2%	\$48,962,687	7.5%
APR	\$56,039,930	4.2%	\$49,762,219	-11.2%	\$47,526,004	-4.5%	\$47,910,051	0.8%	\$57,355,084	19.7%
MAY	\$65,095,104	2.5%	\$55,758,719	-14.3%	\$53,572,556	-3.9%	\$51,265,138	-4.3%	\$61,434,399	19.8%
SPRING	\$176,741,550	2.1%	\$156,939,852	-11.2%	\$144,414,593	-8.0%	\$144,732,517	0.2%	\$167,752,171	15.9%
JUN	\$77,035,525	6.1%	\$74,616,804	-3.1%	\$75,908,166	1.7%	\$58,899,681	-22.4%	\$82,248,451	39.6%
JUL	\$80,400,085	0.6%	\$80,234,021	-0.2%	\$86,278,167	7.5%	\$58,134,589	-32.6%	\$94,762,238	63.0%
AUG	\$61,780,433	0.0%	\$55,317,935	-10.5%	\$52,839,963	-4.5%	\$38,756,430	-26.7%	\$58,052,974	49.8%
SUMMER	\$219,216,043	2.3%	\$210,168,760	-4.1%	\$215,026,297	2.3%	\$155,790,701	-27.5%	\$235,063,663	50.9%
SEP	\$43,261,798	-11.1%	\$36,391,648	-15.9%	\$35,993,890	-1.1%	\$35,502,120	-1.4%	\$38,743,628	9.1%
OCT	\$39,052,193	-6.6%	\$37,432,331	-4.1%	\$33,253,424	-11.2%	\$36,230,725	9.0%	\$39,983,894	10.4%
NOV	\$34,808,687	-4.7%	\$28,073,575	-19.3%	\$24,694,902	-12.0%	\$26,893,508	8.9%	\$30,748,364	14.3%
FALL	\$117,122,677	-7.8%	\$101,897,554	-13.0%	\$93,942,217	-7.8%	\$98,626,353	5.0%	\$109,475,886	11.0%
ANNUAL	\$627,140,542	-1.8%	\$560,776,328	-10.6%	\$536,842,889	-4.3%	\$475,720,367	-11.4%	\$597,794,314	25.7%

Gulf Shores & Orange Beach Tourism TAXABLE LODGING RENTALS

Fort Morgan, Gulf Shores, Orange Beach, Alabama

Source: Alabama Department of Revenue

	2007	VAR.	2008	VAR.	2009	VAR.	2010	VAR.	2011	VAR.
DEC	\$3,490,282	9.8%	3,947,519	13.1%	\$4,328,753	9.7%	\$3,901,977	-9.9%	\$4,332,702	11.0%
JAN	\$5,670,657	-3.5%	5,709,030	0.7%	\$5,810,568	1.8%	\$6,300,115	8.4%	\$6,577,895	4.4%
FEB	<u>\$8,425,318</u>	7.4%	<u>9,208,481</u>	9.3%	<u>\$9,088,347</u>	-1.3%	<u>\$9,544,897</u>	5.0%	<u>\$9,919,042</u>	3.9%
WINTER	\$17,586,257	4.1%	18,865,030	7.3%	\$19,227,667	1.9%	\$19,746,988	2.7%	\$20,829,638	5.5%
MAR	\$16,382,723	20.5%	\$17,663,872	7.8%	\$14,184,584	-19.7%	\$16,191,907	14.2%	\$18,099,997	11.8%
APR	\$18,721,483	23.2%	\$14,608,074	-22.0%	\$16,804,541	15.0%	\$17,747,340	5.6%	\$19,865,523	11.9%
MAY	<u>\$22,509,039</u>	11.9%	<u>\$24,118,717</u>	7.2%	<u>\$22,064,192</u>	-8.5%	<u>\$21,009,454</u>	-4.8%	<u>\$27,900,502</u>	32.8%
SPRING	\$57,613,245	17.8%	56,390,663	-2.1%	\$53,053,317	-5.9%	\$54,948,701	3.6%	\$65,866,021	19.9%
JUN	\$50,442,441	31.9%	\$48,367,507	-4.1%	\$46,787,497	-3.3%	\$29,232,831	-37.5%	\$55,324,311	89.3%
JUL	\$51,863,406	12.6%	\$55,544,441	7.1%	\$56,531,999	1.8%	\$27,302,769	-51.7%	\$70,153,772	156.9%
AUG	<u>\$28,583,673</u>	39.2%	<u>\$27,050,064</u>	-5.4%	<u>\$29,982,362</u>	10.8%	<u>\$14,186,139</u>	-52.7%	<u>\$29,425,711</u>	107.4%
SUMMER	\$130,889,520	24.8%	\$130,962,011	0.1%	\$133,301,858	1.8%	\$70,721,739	-46.9%	\$154,903,794	119.0%
SEP	\$13,809,936	23.3%	\$11,372,500	-17.6%	\$15,042,680	32.3%	\$12,244,706	-18.6%	\$16,195,725	32.3%
OCT	\$11,552,849	13.7%	\$10,938,603	-5.3%	\$10,879,836	-0.5%	\$11,828,435	8.7%	\$14,028,783	18.6%
NOV	<u>\$5,929,950</u>	-2.8%	<u>\$4,756,988</u>	-19.8%	<u>\$5,131,814</u>	7.9%	<u>\$5,648,718</u>	10.1%	<u>\$6,363,610</u>	12.7%
FALL	\$31,292,734	13.9%	\$27,068,091	-13.5%	\$31,054,329	14.7%	\$29,721,859	-4.3%	\$36,588,118	23.1%
ANNUAL	\$237,381,756	19.8%	\$233,285,794	-1.7%	\$236,637,170	1.4%	\$175,139,286	-26.0%	\$278,187,569	58.8%