

0022214

From: [Mike Murray](#)
To: carolm@rti.org
Cc: Sandra_Hamilton; pfield@cbuilding.org; rnf@fisherccs.com
Subject: Fw: visitation data
Date: 11/21/2008 11:03 AM

FYI

Mike Murray
Superintendent
Cape Hatteras NS/ Wright Brothers NMem/ Ft. Raleigh NHS
(w) 252-473-2111, ext. 148
(c) 252-216-5520
fax 252-473-2595

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----- Forwarded by Mike Murray/CAHA/NPS on 11/21/2008 11:03 AM -----

"Scott Leggat"
<scottl@outerbeaches.com>

To <Mike_Murray@nps.gov>

cc

11/21/2008 10:05 AM

Subject Re: visitation data

Good morning Mike,
Thank you for considering the input I offered during the breakout session.
My opinion is that determining occupancy by evaluating Dare County occupancy

taxes is a difficult, if not impossible method for determining actual occupancy numbers and visitation. There are many difficulties the raw data poses in using it for our purposes. Most importantly, the data only gives tax revenue collected. The weeks we are concerned about actually cover several different rate periods on most of the rental companies rate structures. For instance the first week of September is usually in the "Mid" season of most companies. The second or third week of Sept. drops to "Off" season rates in several programs. Comparing revenue from the first week of Sept. against the third week of Sept. would likely indicate a higher

occupancy for the first week in Sept. over the third due to more taxes being collected. The opposite is most likely the reality. Consumers are very attuned to the rates and take advantage of those transitional weeks when the rate drop.

They come in higher numbers than during the last couple of weeks of the previous "Mid" season when the rates are higher. Comparing the tax revenue would not indicate that this is the not case because the Mid weeks generate more tax revenue than the "Off" season weeks. There are also the complications with the number of Check-in dates in one month over another. I think all of the available methods of collecting occupancy information are

to some degree flawed. The best method available is to have the rental companies submit their occupancy figures. There are some issues here as well, especially with accounting for owner occupied homes. Most owners depend on the revenue from the high seasons to meet their financial objectives and therefore choose to come during the "Off" season for their personal use to lessen the impact to their revenue stream.

My suggestion that there may soon be a better method to collect the information more accurately come from an initiative among the property management companies to voluntarily pool their data through Smith Travel Analytics. Smith Travel currently collects data from the motel/hotel industry via automatic downloads weekly. The companies voluntarily submit the data and have access to the analytics to compare their own performances against industry wide and local market trends. The specific companies are not identified in the reports to preclude competitors from gaining access to

proprietary information. The property management industry is attempting to organize a similar program that may be in place next spring.

I have personally collected occupancy data on the four largest companies for

several years. I have submitted this to Carol Mansfield of RTI. My sense is that it will all least provide you with a general occupancy curve that would serve the purposes of the Village Closure Committee because it includes both guest and owner occupancy assumptions.

I hope this helps. I am more than willing to clarify any of my observations

or to help analyze any of the available data.

Scott

----- Original Message -----

From: <Mike_Murray@nps.gov>

To: <scottl@outerbeaches.com>

Cc: <pfield@cbuilding.org>; <rcf@fisherics.com>

Sent: Wednesday, November 19, 2008 4:35 PM

Subject: visitation data

>

> Hi Scott,

>

> I am following up on the discussion from one of the break-out sessions the
> other day about what is the most appropriate data to consider in trying to
> identify dates for when village beach closures should be seasonally closed
> to ORV use. During the discussion, you expressed concerns about the
> validity of using the Dare County occupancy revenue data, since it may not
> be reflective of on how the calendar affects revenue (e.g., in there were
> an extra week or weekend in the month). In determining the dates that NPS
> used in its alternatives, we looked at both the NPS visitation data and
> the

> Dare County occupancy revenue data. In either case, there appears to be a
> clear distinction (i.e., "breaks in the bell curve") between the
> off-season

> (Nov - Mar), the shoulder seasons (Apr-May and Sept - Oct), and the peak
> season (June - Aug); though there is some variability year-to-year (e.g.,
> some years March is busier than in other years, but still not as busy as
> April), presumably based on things like weather and how the weekends or
> Easter holiday falls on the calendar. While the time frames for the
> shoulder seasons look pretty clear to me, perhaps the debate is less about
> where to draw the line between the "shoulder season" and the "off-season"
> and more about how much ORV restriction in the villages is desirable
> during

> the shoulder season?

>

> In any case, my impression is that you were suggesting that some other
> form

> of data would be more appropriate to consider than visitation or occupancy
> revenue. I would appreciate it if you would suggest what other data you
> think is most relevant to the issue and provide the data, if you have it,
> so it can be referred to the Village Closure Subcommittee for their
> consideration (or, if you do not have it, please suggest where we might
> obtain it).

>

> Thank you,

>

>

> Mike Murray

> Superintendent

> Cape Hatteras NS/ Wright Brothers NMem/ Ft. Raleigh NHS

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