

# BCC/TDC JOINT WORKSHOP

## February 19, 2008



# 2007 IN REVIEW



# TOURISM IMPACT 2007

- **1,393,820 Visitors - 0.6%**
- **\$70,061,100 Direct Spending +6.4%**
- **\$1,179,622,326 Economic Impact +6.3%**
- **\$14,343,027 Tourist Tax Revenue +3.6%**
- **\$167.35 Average Daily Lodging Rate  
+ \$11.52 or + 7.4%**
- **67% Lodging Occupancy -0.2% or -1.4 Pts**

# TOURISM ECONOMIC INDICATORS

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YEAR	TOURIST TAX REVENUE	# VISITORS	DIRECT SPENDING	MEETINGS IMPACT	ANNUAL OCCUPANCY	AV.DAIL RATE
2004	\$9,894,253	1,446,615	\$681,237,905	N/A	73.50%	\$140.08
2005**	10,706,176	1,415,775	\$713,368,588	\$2,701,243	68%	\$146.78
2006	\$13,837,680	1,401,711	\$744,349,458	\$10,171,825	68.40%	\$155.80
2007	\$14,343,027	1,393,820	\$791,161,855	\$13,827,733	67%	\$167.35

# Collier County Tourism Research

## 2007 Economic Impact

Presented to:

**The Collier County BCC and TDC Joint Workshop**

By:

**Research Data Services, Inc.**

**February 19, 2008**

# Occupancy

## 2007 Annual

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	<u>2006</u>	<u>2007</u>	<u>'06-'07</u> <u>% Δ</u>	<u>'06-'07</u> <u>Pt. Δ</u>
Jan.	70.3%	71.7%	+2.0	+1.4
Feb.	86.5	87.6	+1.3	+1.1
Mar.	87.0	86.3	-0.8	-0.7
Apr.	79.4	77.8	-2.0	-1.6
May	71.6	69.1	-3.5	-2.5
Jun.	68.9	66.0	-4.2	-2.9
Jul.	67.3	65.3	-3.0	-2.0
Aug.	50.4	52.5	+4.2	+2.1
Sep.	49.4	45.6	-7.7	-3.8
Oct.	56.4	54.4	-3.5	-2.0
Nov.	68.9	66.0	-4.2	-2.9
Dec.	64.8	61.1	-5.7	-3.7

# Average Daily Room Rate

## 2007 Annual

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	<u>2006</u>	<u>2007</u>	'06-'07 <u>% Δ</u>	'06-'07 <u>\$ Δ</u>
Jan.	\$170.0	\$174.7	+2.8	+\$4.70
Feb.	222.4	242.9	+9.2	+\$20.50
Mar.	248.5	276.6	+11.3	+\$28.10
Apr.	224.3	239.5	+6.8	+\$15.20
May	157.0	176.9	+12.7	+\$19.90
Jun.	132.9	137.2	+3.2	+\$4.30
Jul.	114.9	118.9	+3.5	+\$4.00
Aug.	102.5	107.8	+5.2	+\$5.30
Sep.	99.6	106.1	+6.5	+\$6.50
Oct.	112.1	120.3	+7.3	+\$8.20
Nov.	121.6	131.1	+7.8	+\$9.50
Dec.	164.2	176.2	+7.3	+\$12.00

# Number of Visitors

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## 2007 Estimates

	<u>2007</u>	<u>Δ %</u>
Quarter 1	487,180	0.0
Quarter 2	334,600	-2.5
Quarter 3	253,770	-0.1
Quarter 4	318,270	+0.3
Annual	1,393,820	-0.6



# Impacts of Tourism

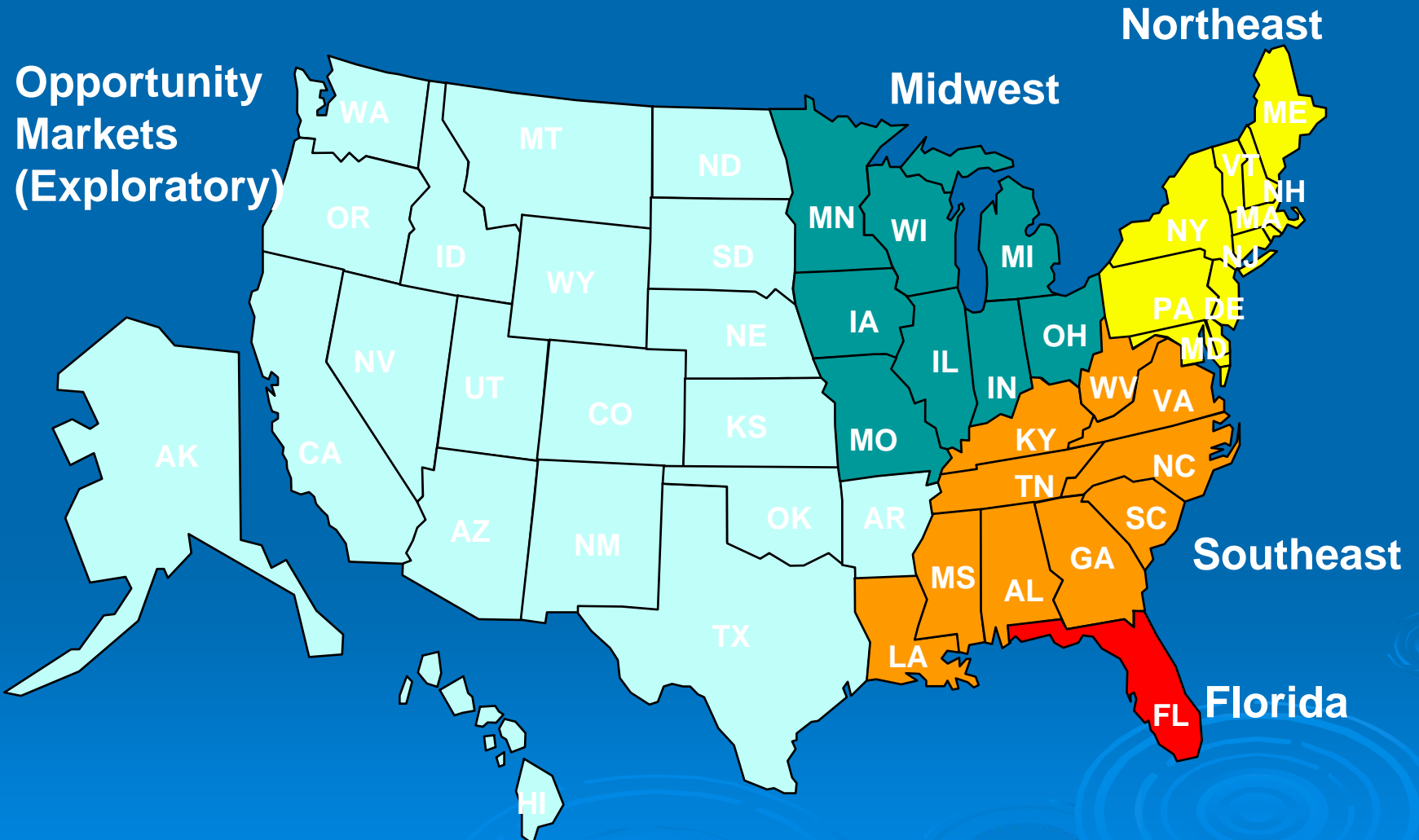
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## 2007 Estimates Direct & Induced

	<u>2006</u>	<u>2007</u>	<u>Δ %</u>
Q1	\$409,454,804	\$441,979,240	+7.9
Q2	315,895,452	327,945,524	+3.8
Q3	152,491,376	161,211,468	+5.7
Q4	231,983,409	248,486,094	+7.1
Annual	\$ 1,109,825,041	\$1,179,622,326	+6.3

# United State Regions

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# 2007 Visitor Origins

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	<u>2007</u>	<u>Δ %</u> <u>06-07</u>
Florida	538,071	-4.1
Southeast	102,176	-6.9
Northeast	249,452	+4.0
Midwest	246,908	+0.6
Canada	33,612	+0.4
Europe	141,400	+1.8
Markets of Opp.	82,201	+11.6
<b>Total</b>	<b>1,393,820</b>	<b>-0.6</b>

# Purpose of Trip (%)

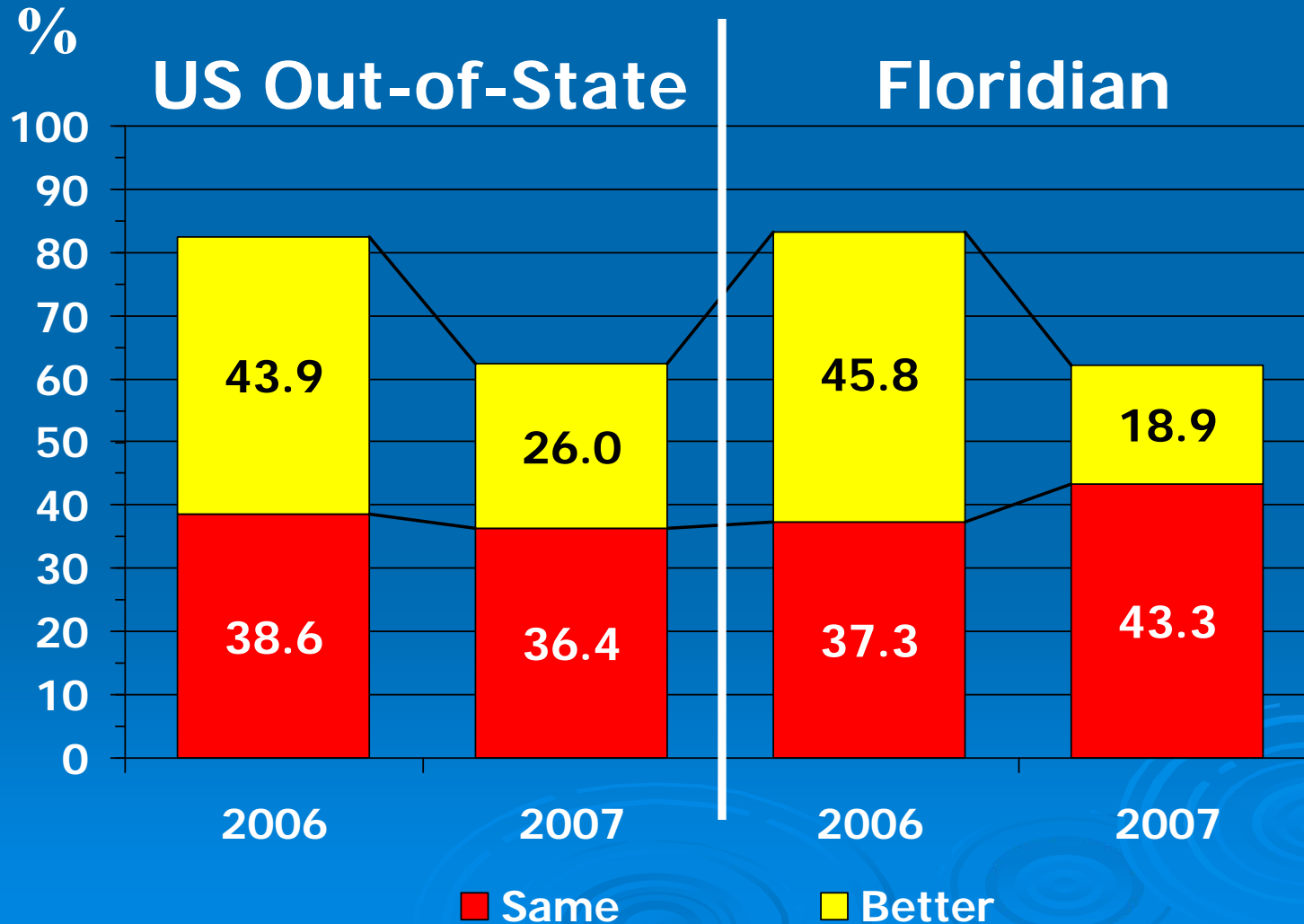
## 2006 - 2007 Visitors

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	First Quarter		Second Quarter		Third Quarter		Fourth Quarter	
	'06	'07	'06	'07	'06	'07	'06	'07
Leisure	70.3	65.9	68.3	64.9	67.1	69.4	66.9	64.7
Business/ Meetings	29.7	34.1	31.7	35.1	32.9	30.6	33.1	35.3

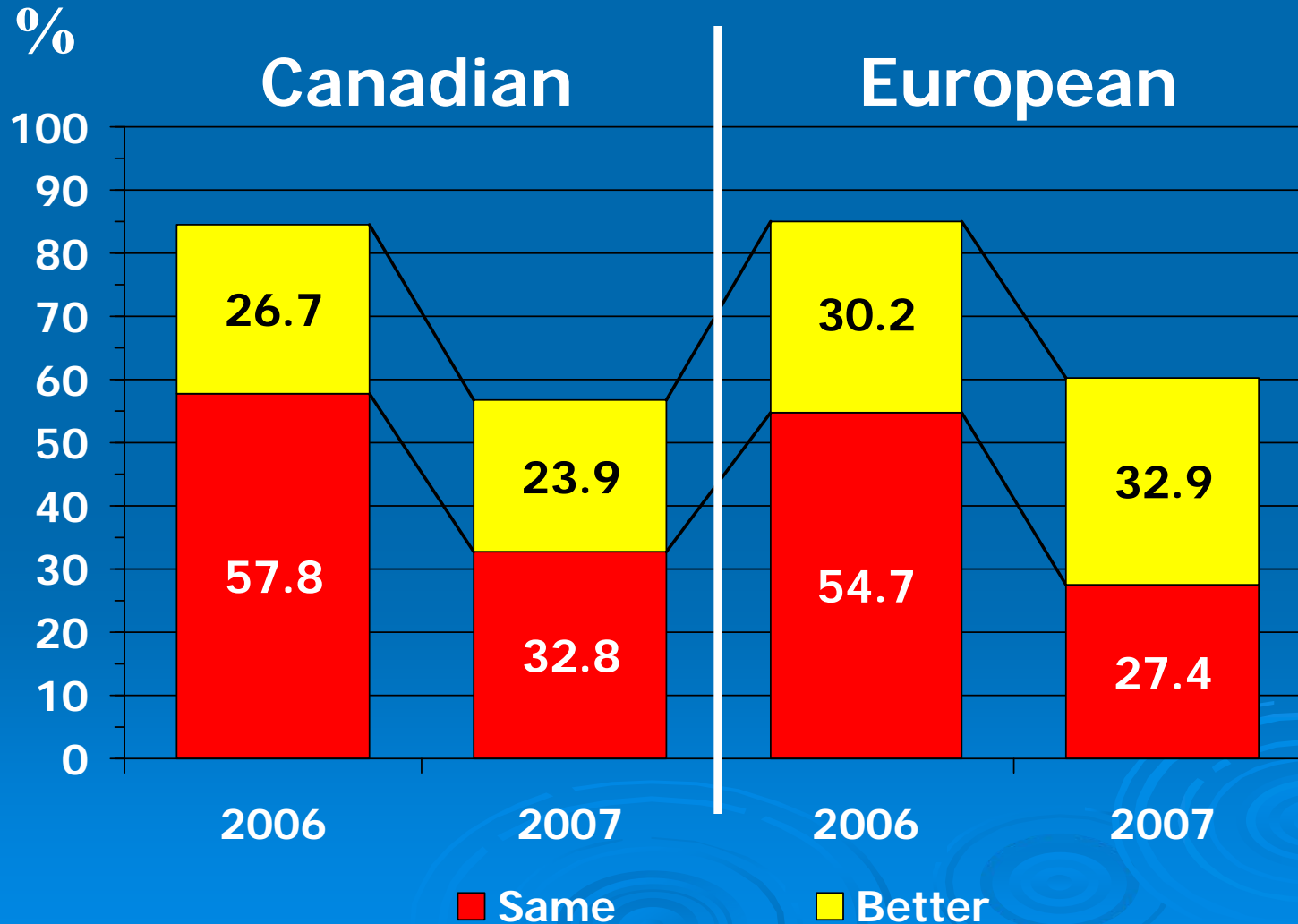
# Management Barometer

## Q1 2008 Next Three Months Reservation Outlook: Better/Same



# Management Barometer

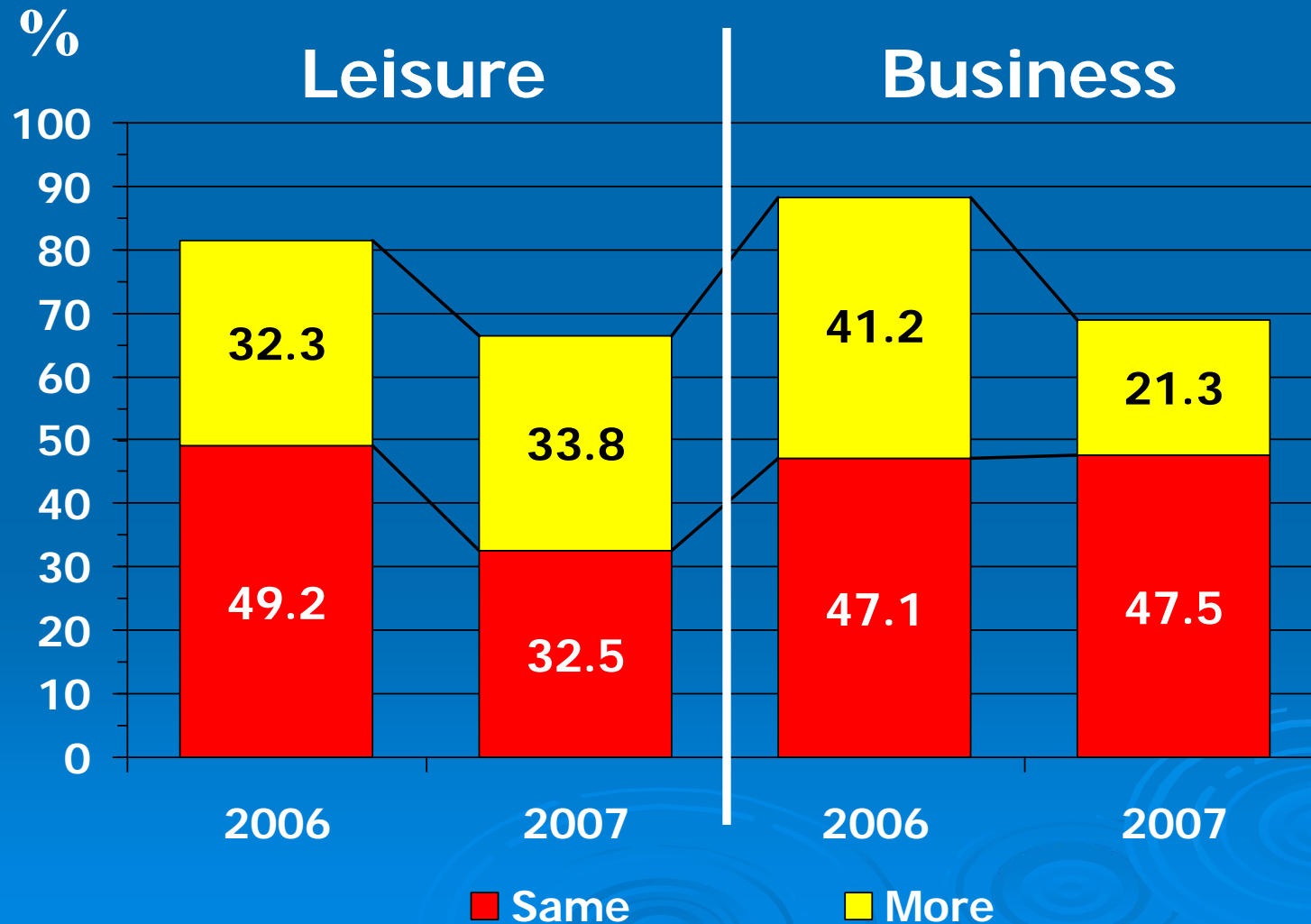
*Q1 2008 Next Three Months Reservation Outlook: Better/Same*



# Management Barometer

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*Q1 2008 Next Three Months Expectations:  
More/Same*



*Thank you!*





# **Paradise Advertising & Marketing, Inc.**

## **2008 Marketing Plan**



# **Sales & Marketing Annual Report**

**Niccole Haschak,  
Sales & Marketing Associate**

A decorative graphic consisting of several sets of concentric circles in a lighter shade of blue, scattered across the bottom half of the slide. The circles vary in size and are positioned in the lower right and bottom center areas.

# 2007 Year End Sales

## Leads Report

- **184 RFP's sent to hotels in 2007**
  - **Over 76,000 potential room nights**
  - **Booked 34 groups**
  - **17,000 estimated room nights**
  - **Over \$2,828,000 in room rental**
  - **(F&B and Meeting rental not included in this estimate based on \$166.40 annual ADR)**

# 2007 Accomplishments

- **Successful Promotions**
- **Training & Experience Volunteers**
- **Newsletters to Meeting Planners, Attractions and Travel Agents quarterly**
- **Meeting Planner FAM's**
- **Brochure Distribution**
  - **Visitors Centers, Airports, Travel Agents, Meeting Planners & Trade Shows**
- **Sponsorship Support**

# Accomplishments Continued

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- **Annual Meeting Planner Guide**
- **Passport to Paradise Maps**
- **Escorted 9 Meeting Planners  
& Tour Operators**
- **iDSS Data Base Program**
- **Continuing Education**
  - **9 seminars and 24 points earned toward  
Professional in Destination  
Marketing Designation**

# Accomplishments Continued

- **Associations and Memberships**
  - **MPI, HSMAI, DMAI, ASAE, National Wedding Professionals, SWFL Concierge, FSAE, SGMP, SWFL Attractions, ASTA, TIA**
- **Cultural Tourism Committee Formed**

# Trade Shows & Events

- **Trade Shows - Debi 16**
  - **Niccole 9**
  - **Jack 5 Major Trade Shows**
  - **Total of 30**
  - **Prospecting leads**
- **FAMS -7 major groups escorted & hosted in destination**
- **Events - 50 one-day events hosted/attended**

# RFP History

- **2005 sent 91 RFP's**
- **2006 sent 131 RFP's + 44% over '05**
- **2007 sent 184 RFP's +40% over '06**
- **Trends show repeat planner usage**
- **RFP's coming from Planners met  
at past shows**
- **iDSS Reports Will Help Future Tracking**



# Total Economic Impact Estimate

➤ **\$13,827,733 for 2007**

- **20% Increase over 2006**

# 2005 -2007 Comparison

## Economic Impact

➤ 2005	\$2,701,243	
➤ 2006	\$10,171,825	up 27%
➤ 2007	\$13,827,733	up 7%

# **Public Relations Annual Report**

**JoNell Modys,  
Public Relations &  
Communications Manager**

The background of the slide features several sets of concentric circles in a lighter shade of blue, resembling ripples in water. These circles are scattered across the lower half of the slide, with one set being particularly prominent in the bottom right corner.



# Communications Accomplishments 2007

- **Growing focus on individual itineraries**
  - Customized service produces key story points
- **High quality group FAM experiences**
- **Excellent focus on outdoor, luxury and family media produces quality coverage**
- **Secured BCF as CVB PR Agency**
- **YTD Ad Value \$7+Million**
  - Analysis Nearly Complete – number will grow



# Communications Outlook 2008

## MEDIA RELATIONS

- Destination releases at least monthly
- New travel media e-news with links story ideas, partner info

## PARTNER PROJECTS

- Improved industry e-news
- Tourism PR 101 Seminar

## FAMS

- Groups – Spring & Fall
- Individual – As Opportunities Arise



## ➤ INTERNET PROJECTS

- Video segments for Web site, YouTube
- *Destination Diary* blog for staff and visiting VIPs
- An online contest to highlight arts/culture & nature...

# Outlook '08

**PAINIT**  
**PARADISE**  
**PRESERVE**  
**PARADISE**



# Web-based Arts, Culture and Nature Initiative

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Quisque molestie elit. Vivamus vestibulum cursus du

**PAINT  
PARADISE  
PRESERVE  
PARADISE**

Jane Smith, Naples Painter & this session's Host Artist



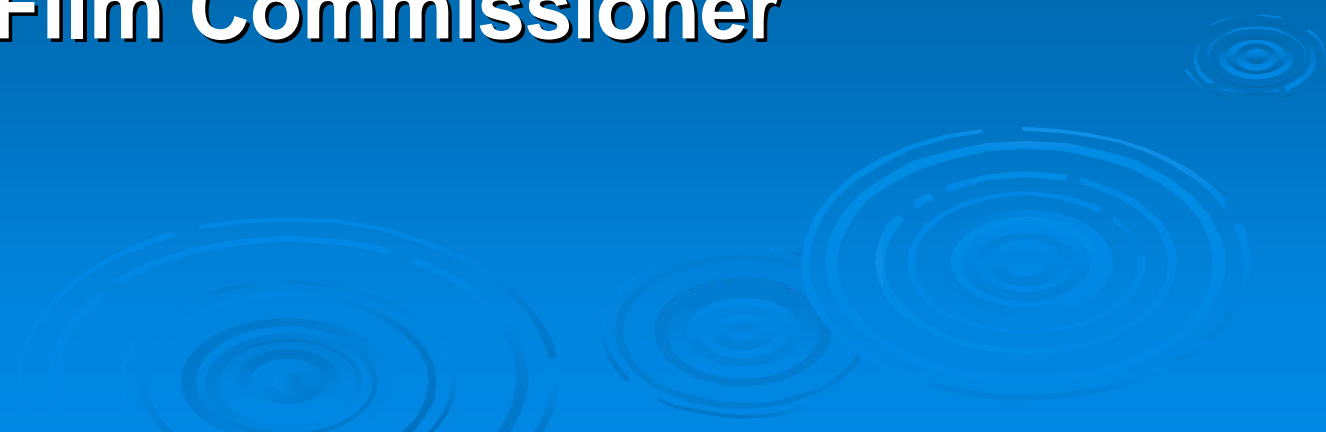
# **Advertising & Promotion Annual Report**

**Cedar Hames  
Paradise Advertising &  
Marketing, Inc.**

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# **Film Office Annual Report**

**Maggie McCarty,  
Film Commissioner**



# 2007 HIGHLIGHTS

- 3 NATIONAL COMMERCIALS
- LEGISLATIVE WORK (INCENTIVES)
- TRAINING
  - Photoshop<sup>®</sup>, Location Photography
  - Masters Program (Marketing, Economics) AFCI
  - Reel-Scout<sup>®</sup>

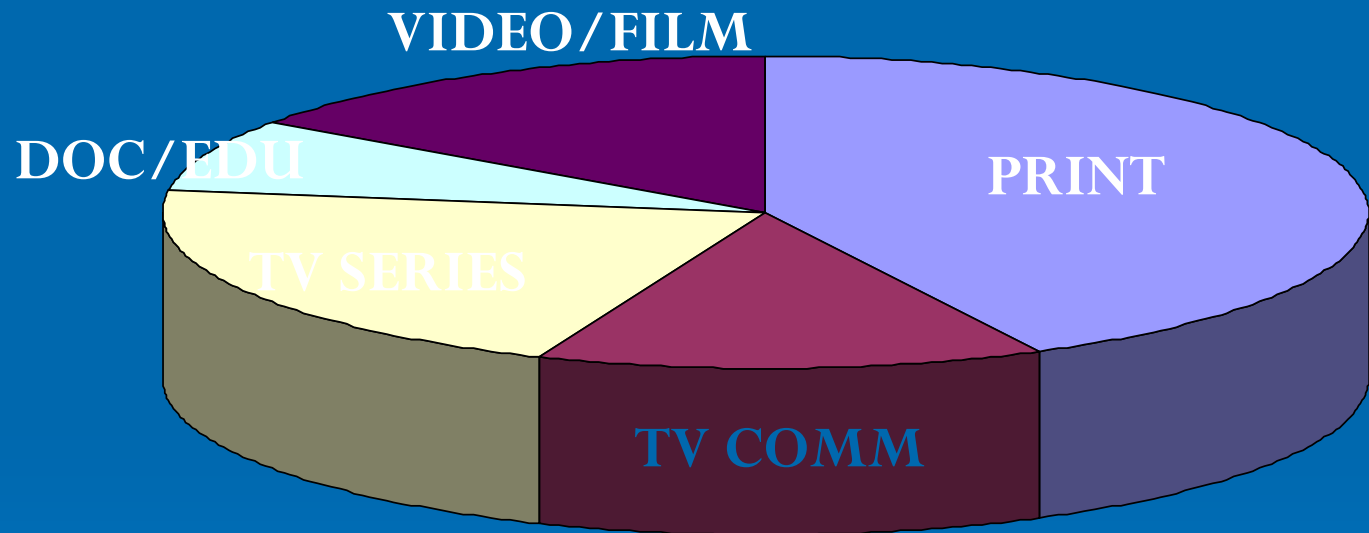
# PRODUCTIONS WRAPPED

**66 TOTAL:**

- 28 PRINT PROJECTS**
- 9 TV COMMERCIALS**
- 14 TV SEGMENTS/SERIES**
- 5 DOC/EDUCATIONAL**
- 10 VIDEO/FILM**



# PRODUCTION BY TYPE

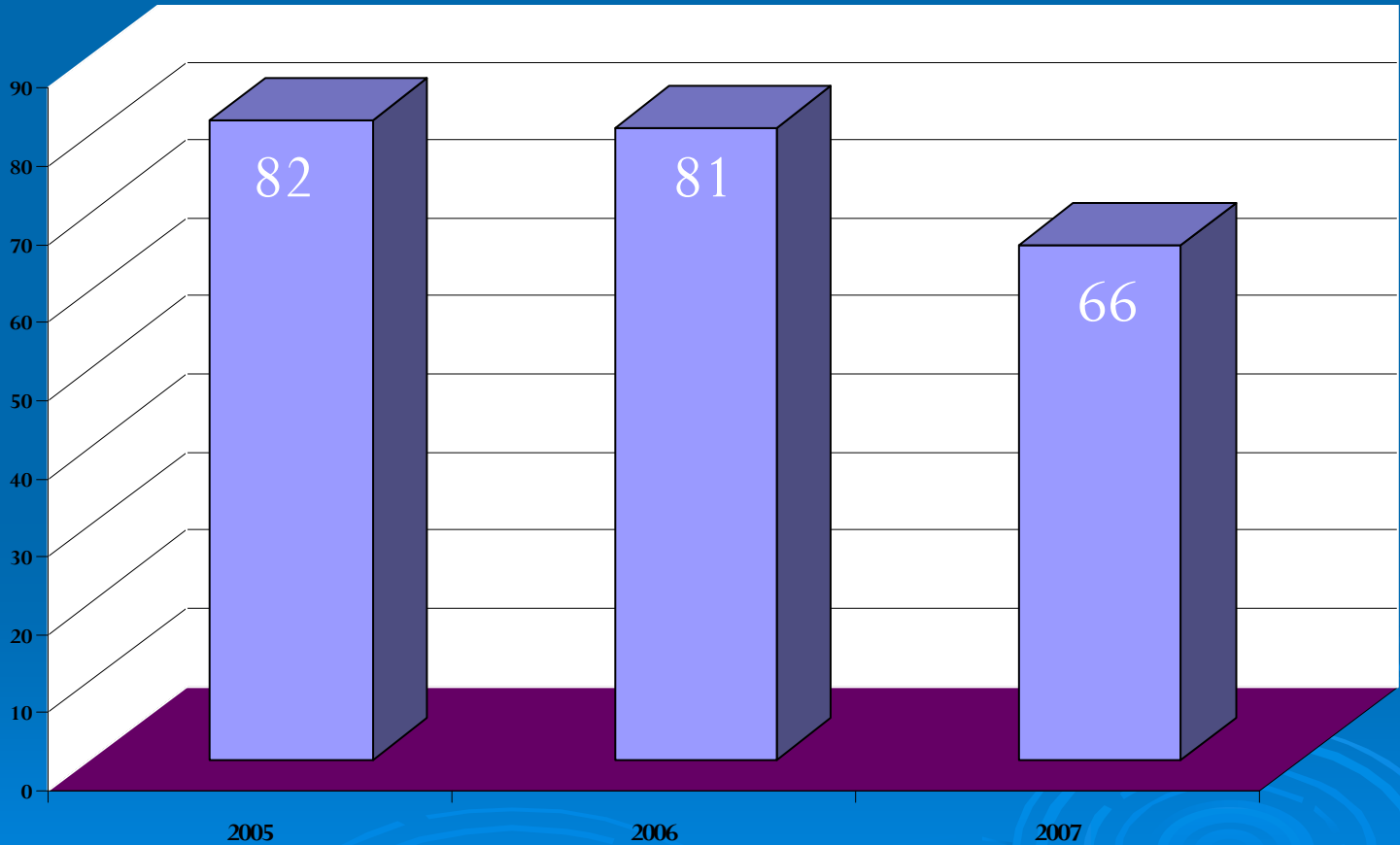


**OVER 40% - STILL PHOTOGRAPHY**

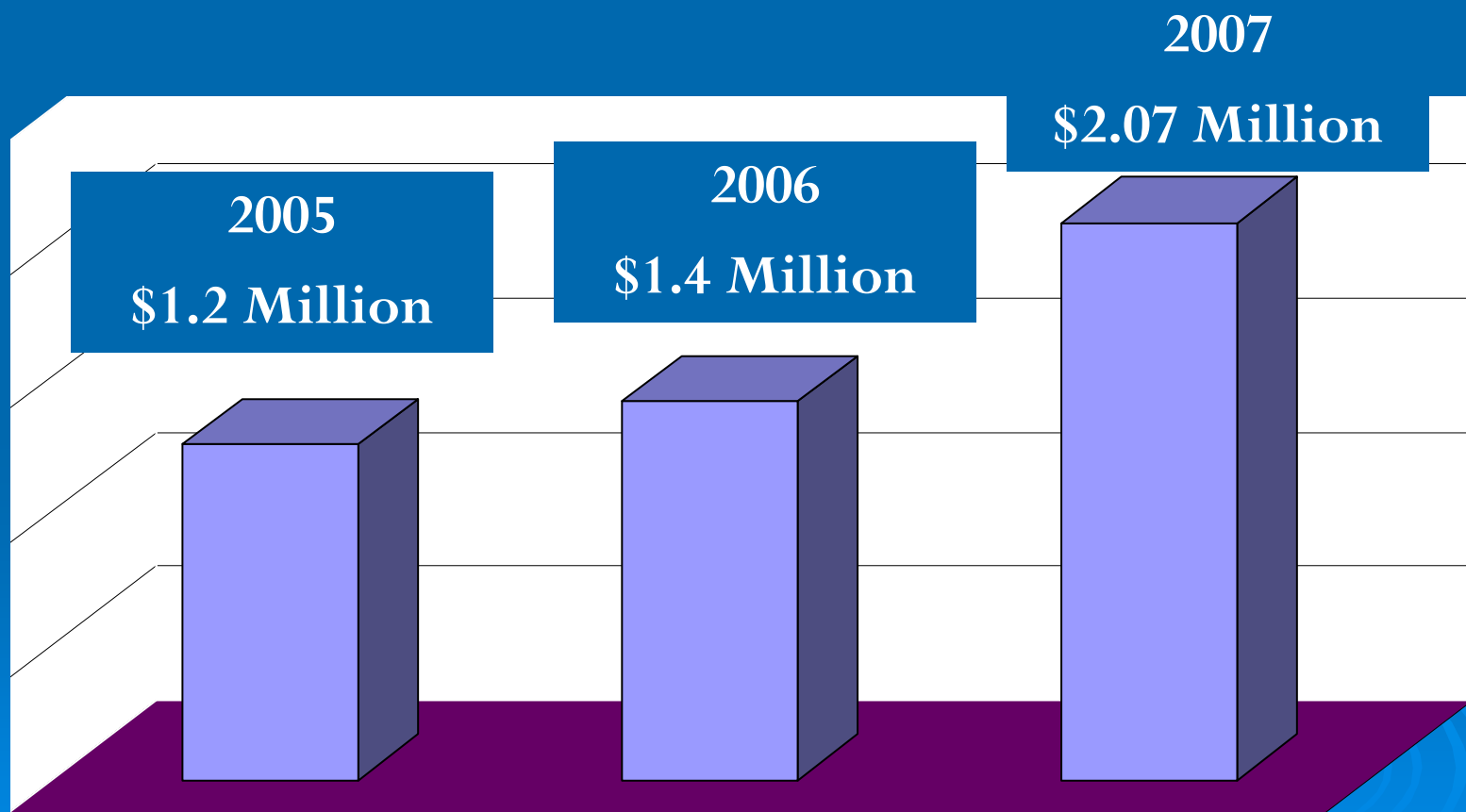
**VIDEO/FILM PRODUCTION UP 10%**

# TOTAL PROJECTS COMPARISONS

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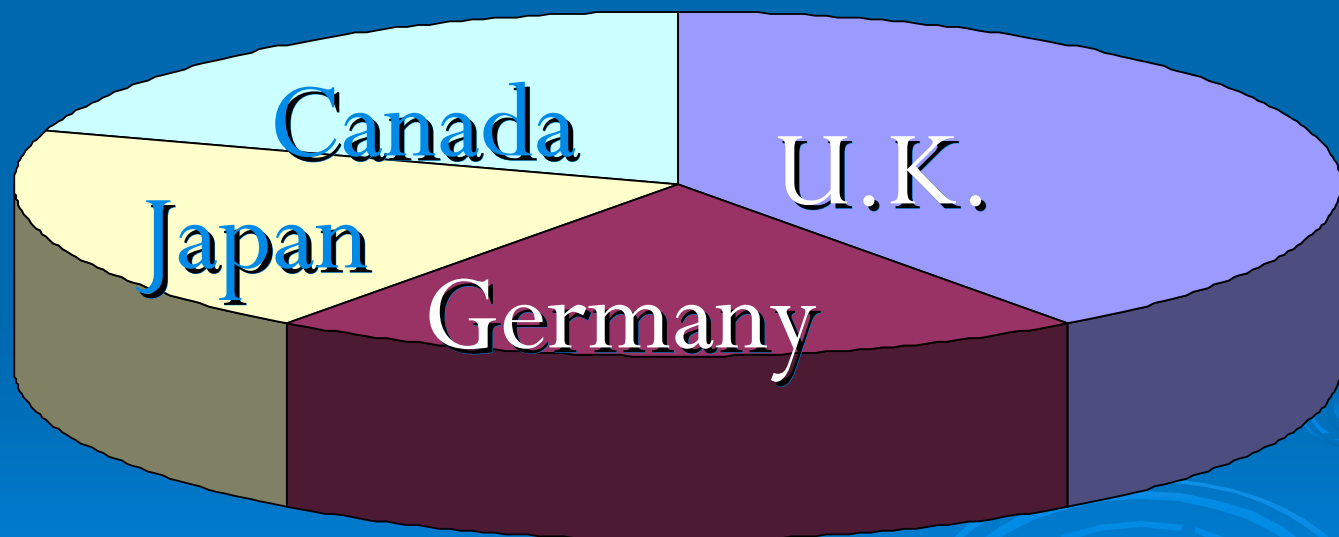


# PRODUCTION REVENUE COMPARISON



# NON-U.S. CLIENTS

15% TOTAL  
PROJECTS/SCOUTS





# NEXT YEAR'S OBJECTIVES

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- NEW WEBSITE w/ ORIGINAL VIDEO CONTENT
- EUROPEAN MARKET OPPORTUNITIES
- EXPAND LOCATION LIBRARY
- AFCI MASTERS COURSE CERTIFICATION



# **Sports Marketing Annual Report**

**Ralph Pryor,  
Sports Coordinator**

The background of the slide is a solid blue color. In the lower right quadrant, there are several decorative elements consisting of concentric circles, resembling ripples in water. These circles are light blue and vary in size and opacity, creating a subtle pattern.



# Sports Marketing

## Overview of all 1<sup>st</sup> Quarter '07

### Events

EVENT FACTORS	Quantity	Multiplier	Event days	Total
How much will event organizers spend locally?				\$ -
How many adult out-of-area participant days expected?	225	\$ 102.00	6	\$ 137,700.00
How many youth out-of-area participant-days are expected?		\$ 51.00		\$ -
How many out-of-area spectator-days are expected?	300	\$ 51.00	6	\$ 91,800.00
How many out-of-town media-days are expected?		\$ 102.00		\$ -
How many in-area spectator days are expected?	100	\$ 25.00	6	\$ 15,000.00
What is the expected event-site spending?				\$ -
What other expenditures, if any, are anticipated?				\$ -
<b>Total direct impact =</b>				<b>\$ 244,500.00</b>
	Output multiplier	1.73	Total output impact	\$ 422,985.00
		Employment impact		8.5575
		Total earnings impact		132030
<b>Transient lodging tax</b>				<b>\$ 1,956.00</b>
Local option gasoline tax				\$ 670.07
Occupational license tax rev.				\$ -
Payment for use of public facility				\$ -
<b>Total gross revenue</b>				<b>\$ 2,626.07</b>
Funds expended by local government to attract the event or team				\$ -
Cost of additional public services required by the event or team				\$ -
Additional items				\$ -
Total expenditures				\$ -
Gross revenue				\$ 2,626.07
Net revenue				\$ 2,626.07
November 9-14, 2007				



# Sports Marketing

## Overview of All 1<sup>st</sup> Quarter '08

### Events

EVENT FACTORS	Quantity	Multiplier	Event days	Total
How much will event organizers spend locally?				\$ -
How many adult out-of-area participant days expected?	600	\$ 102.00	2.25	\$ 137,700.00
How many youth out-of-area participant-days are expected?	720	\$ 51.00	2	\$ 73,440.00
How many out-of-area spectator-days are expected?	680	\$ 51.00	2.2	\$ 76,296.00
How many out-of-town media-days are expected?		\$ 102.00		\$ -
How many in-area spectator days are expected?	655	\$ 25.00	2.2	\$ 36,025.00
What is the expected event-site spending?	Concessions			\$ 15,342.75
What other expenditures, if any, are anticipated?				\$ -
<b>Total direct impact =</b>				<b>\$ 338,803.75</b>
	Output multiplier	1.73	Total output impact	\$ 586,130.49
			Employment impact	11.85813125
			Total earnings impact	182954.025
<b>Transient lodging tax</b>				<b>\$ 2,710.43</b>
Local option gasoline tax				\$ 928.52
Occupational license tax rev.				
Payment for use of public facility				\$ -
<b>Total gross revenue</b>				<b>\$ 3,638.95</b>
Funds expended by local government to attract the event or team				\$ -
Cost of additional public services required by the event or team				\$ -
Additional items				\$ -
Total expenditures				\$ -
Gross revenue				\$ 3,638.95
Net revenue				\$ 3,638.95
<b>Overview of All Events</b>				
<b>1st Quarter FY '08 Sports Events Oct. - Dec. 2007</b>				



# Sports Marketing

## Major Objectives 2007 - 08

- Attract at least 3 major sports and/or athletic events to our area for the year 2008 that do not fall into the soccer and softball category. These events should be in other categories such as fishing tournaments, wakeboard/waterskiing, lacrosse, beach and outdoor field volleyball tournaments, offshore motorboat racing, flag football, etc. We should secure at least 3 events by December 31, 2007
- **Status:** As of today, we have secured 2 non-soccer/softball events
- Establish a secure and effective billing system to collect hotel room night rebates from our Sports Council member hotels by December 31, 2007
- **Status:** We have finally brought the billing system up to date allowing us to distribute invoices to all hotels immediately after an event.



# Sports Marketing

## Objectives (continued)

- Recruit at least 3 new hotel members to the Sports Council of Collier County by December 31, 2007
- **Status: 2 new member hotels recruited as of 2/15/08**
- Continue working with the Sports Management Department of Florida Gulf Coast University and other universities to attract additional student interns and volunteers every semester of the 2007-2008 school years.
- **Status: New student intern as of 1/14/08 from U. of Wisconsin**

Ralph Pryor



# Hotel Sports Business Report

Time Period	Average Room Rate	Total Rooms Blocked	Total Rooms Booked	Average Number of Nights Stayed	Actual Room Nights	Approximate Hotel Room Revenue	Tourist Tax Revenue	Expected SCCC Rebate
FY '07 Second Quarter Report	\$211.67	15	588	1.64	965	\$205,116.00	\$8,204.64	\$2,265.00
FY '07 Third Quarter Report	\$123.04	135	304	1.86	564	\$86,709.03	\$3,468.36	\$2,265.00
FY '07 Fourth Quarter Report	\$74.50	25	92	1.8	167	\$12,346.73	\$493.87	\$805.00
<b>FY '07 Yearly Report</b>	<b>\$141.80</b>	<b>175</b>	<b>984</b>	<b>1.72</b>	<b>1,696</b>	<b>\$304,171.76</b>	<b>\$12,166.87</b>	<b>\$5,335.00</b>

\*FY '07 First Quarter Data is not available.

Time Period	Average Room Rate	Total Rooms Blocked	Total Rooms Booked	Average Number of Nights Stayed	Actual Room Nights	Approximate Hotel Room Revenue	Tourist Tax Revenue	Expected SCCC Rebate
FY '08 First Quarter Report	\$94.72	370	284	2	591	\$55,979.52	\$2,239.18	\$2,285.00
FY '08 Second Quarter to Date	\$163.43	305	483	1.73	837	\$136,789.71	\$5,471.59	\$1,690.00
<b>FY '08 YTD</b>	<b>106.17</b>	<b>675</b>	<b>767</b>	<b>1.86</b>	<b>1,428</b>	<b>\$192,769.23</b>	<b>\$7,710.77</b>	<b>\$3,975.00</b>

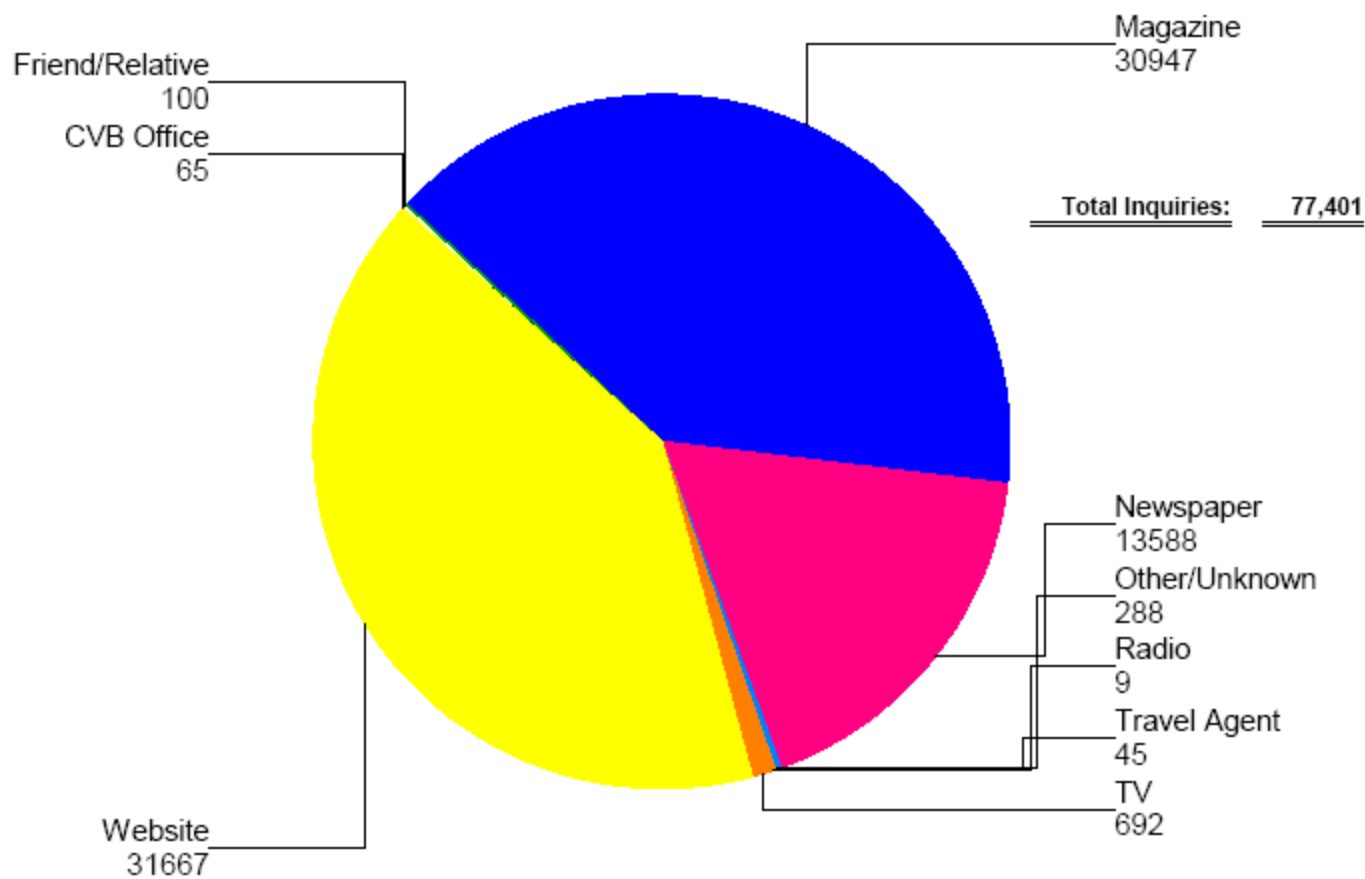


# **Fulfillment Annual Report**

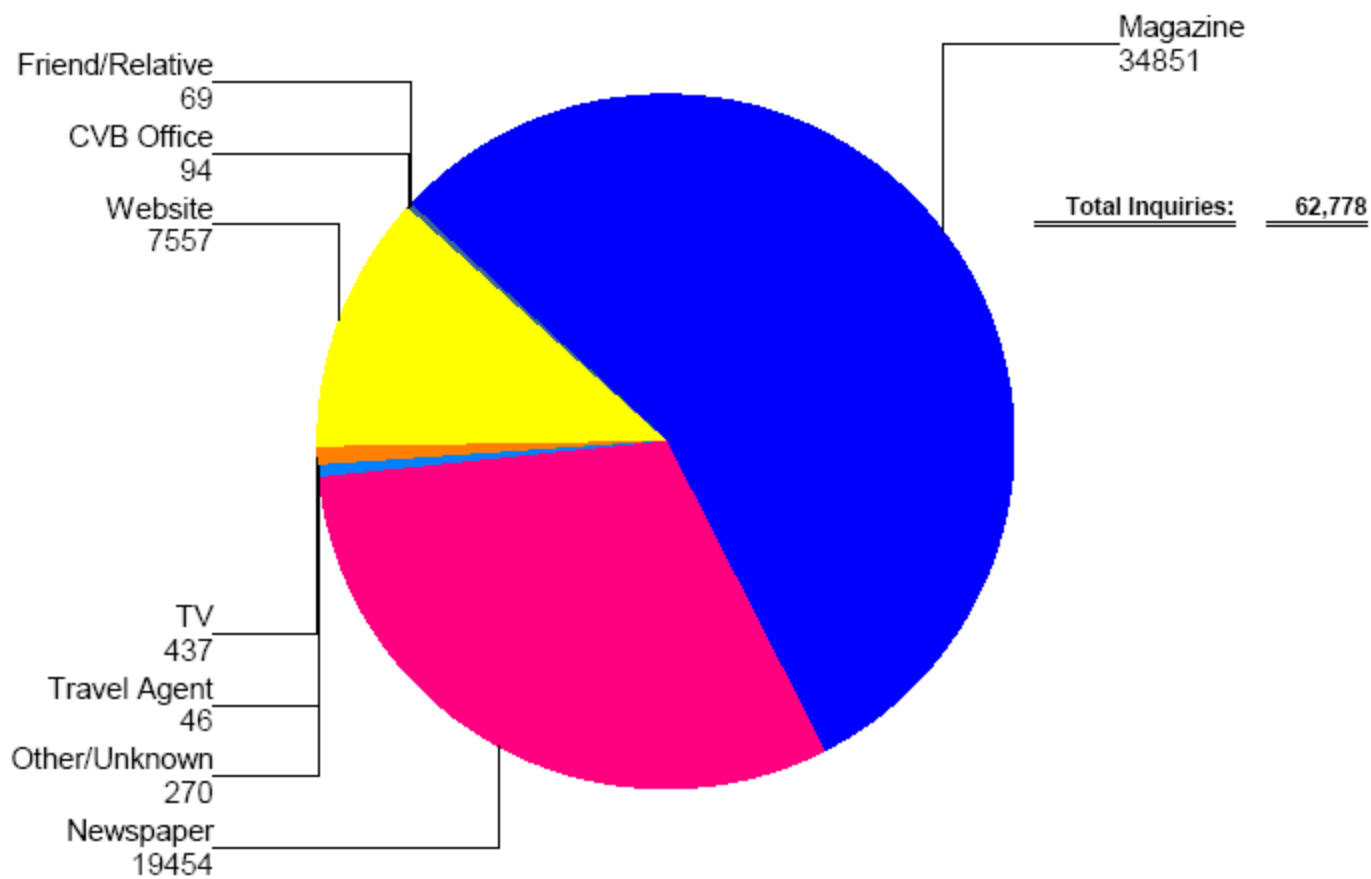
**Ginny DeMas,  
Phase V**



### Naples, Marco Island, Everglades CVB Request Summary by Source Calendar Year 2006



### Naples, Marco Island, Everglades CVB Request Summary by Source Calendar Year 2007



# Inquiries - Leading 6 States

## 2006

- Miami
- Orlando
- Jacksonville
- Tampa
- Sarasota
- Lakeland

## 2007

- Miami
- Orlando
- Jacksonville
- Tampa
- Chicago
- Houston

# Inquiries – Leading 4 Countries

## 2006

- USA
- Canada
- UK
- Germany
- Belgium
- Iran

## 2007

- USA
- Canada
- UK
- Germany
- France
- Brazil

# QUESTIONS?

