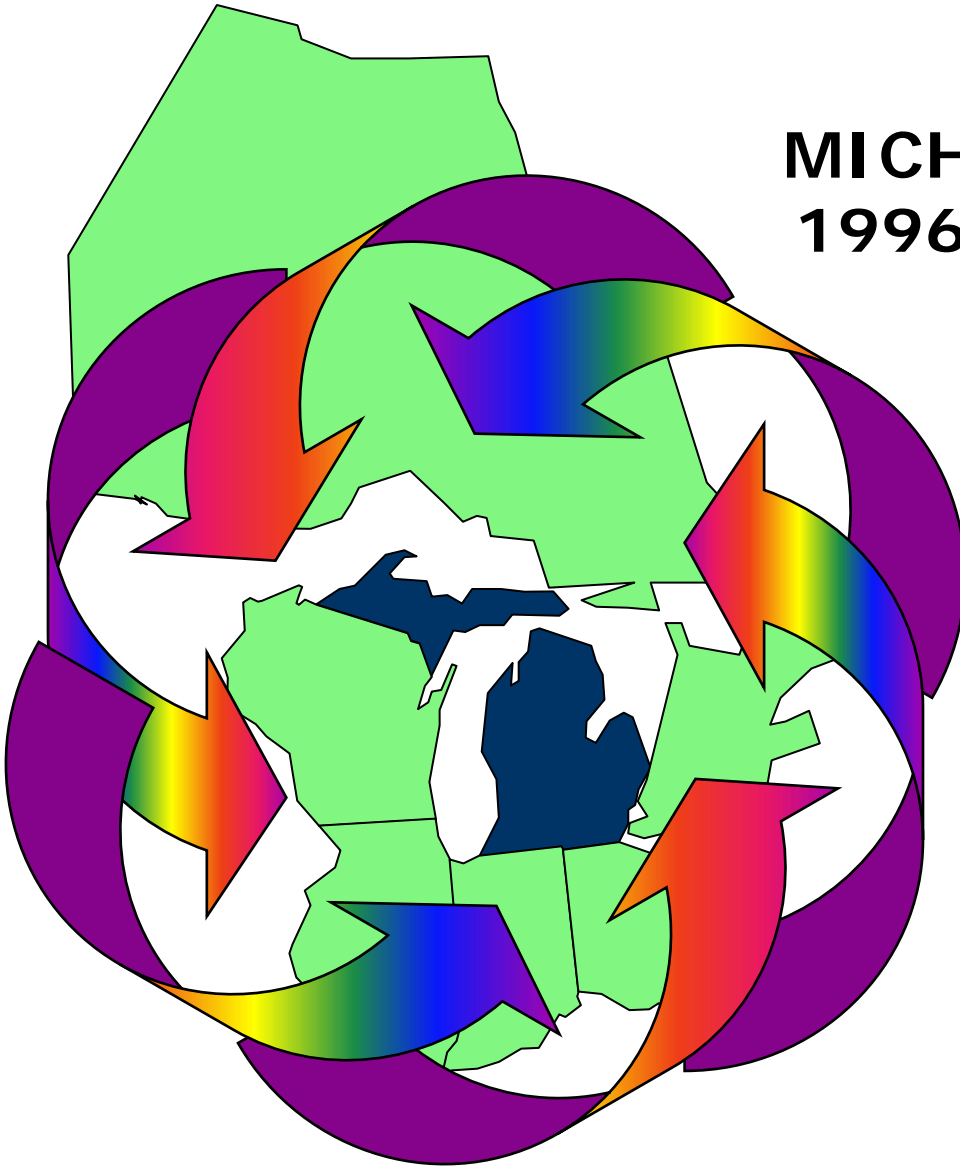


Michigan Tourism Outlook Conference

# MICHIGAN TOURISM MARKET: 1996-1997 VERSUS 2001-2002

SELECTED RESULTS FROM  
MICHIGAN TRAVEL MARKET SURVEY



Presented by:  
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Michigan State University

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Kellogg Center  
East Lansing, Michigan

# About the survey

- Results are based on a telephone survey of randomly selected households in Michigan, Illinois, Indiana, Ohio, Wisconsin and the province of Ontario.
- Interviews were conducted on a monthly basis.
- Respondents took a pleasure trip during 12 months prior to an interview.
- Pleasure trip – any overnight or day trip to a place at least 50 miles from home that was made for your enjoyment, including vacations, weekend getaways, shopping trips, trips to a second home, and trips to visit friends or relatives.

## Sample size, 1996-1997

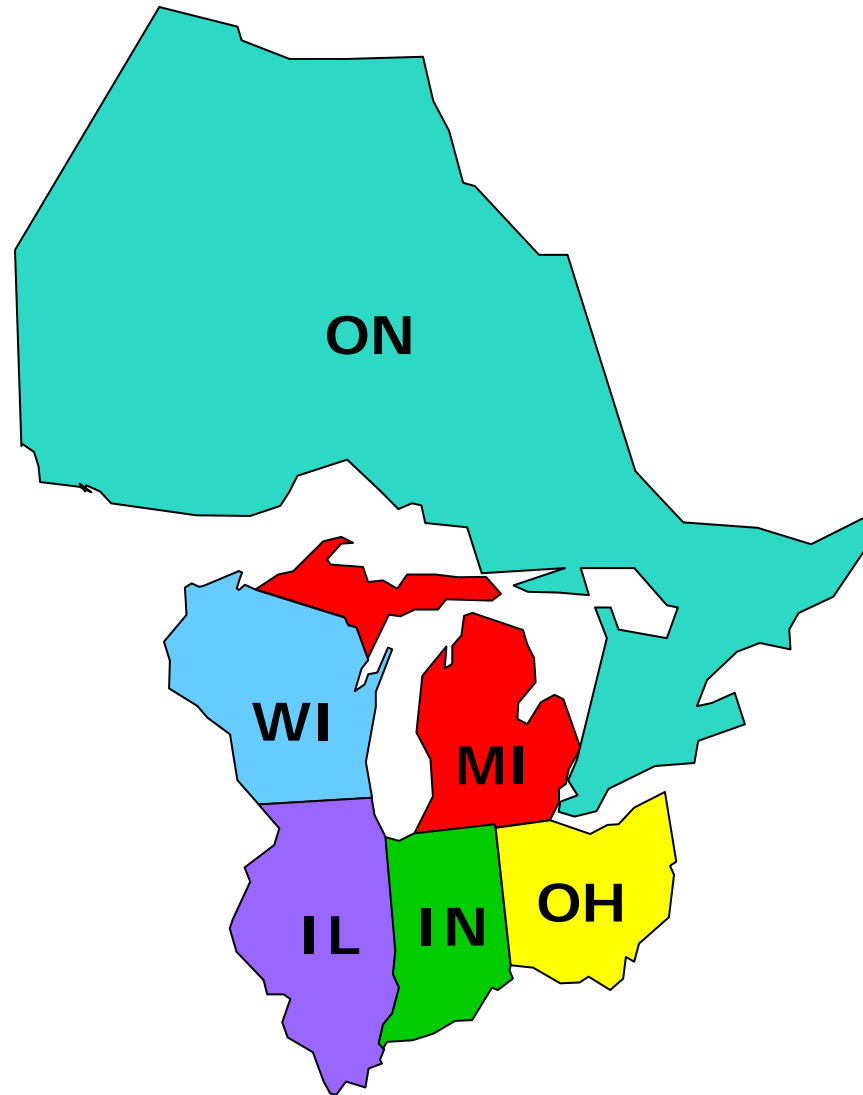
- 10,042 households in the region were interviewed
- 1,492 pleasure travelers to Michigan were interviewed

## Sample size, 2001-2002

- 10,768 households in the region were interviewed
- 1,591 pleasure travelers to Michigan were interviewed

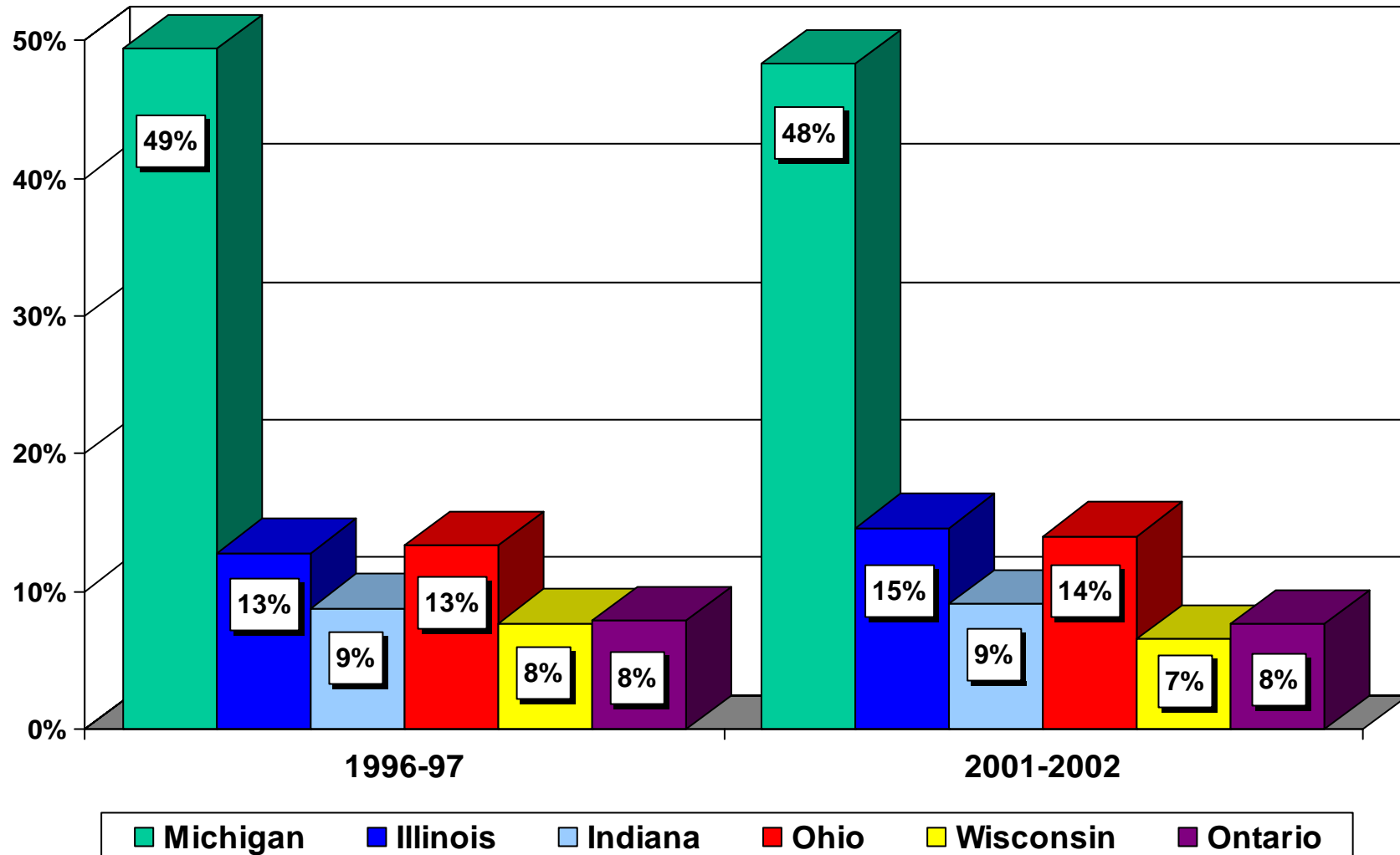


# Survey region



# Where are the visitors coming from?

Origin of pleasure trips to Michigan from within the study region



# Where are the visitors going?

## Primary destinations of respondents' most recent pleasure trip

| Destinations    | State/province of respondents' permanent residence [origins] (in percent) |              |              |              |              |              |              |              |              |              |              |              |
|-----------------|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
|                 | Illinois  |              | Indiana      |              | Michigan     |              | Ohio         |              | Wisconsin    |              | Ontario      |              |
|                 | A   | B            | A            | B            | A            | B            | A            | B            | A            | B            | A            | B            |
| Michigan        | 8.0   | 9.6          | 9.0          | 12.6         | 44.4         | 56.2         | 6.5          | 10.4         | 6.0          | 9.4          | 5.6          | 5.5          |
| Caribbean       | 0.9   | 0.6          | 0.5          | 0.8          | 0.7          | 1.0          | 1.7          | 1.2          | 0.5          | 0.6          | 0.5          | 2.3          |
| Florida         | 10.3  | 7.8          | 13.3         | 9.5          | 8.9          | 5.4          | 11.0         | 9.0          | 6.0          | 5.8          | 7.9          | 6.1          |
| Illinois        | 15.2  | 14.9         | 4.5          | 7.7          | 4.9          | 3.8          | 2.9          | 2.6          | 6.8          | 7.0          | 0.7          | 0.7          |
| Indiana         | 3.5   | 5.5          | 19.2         | 19.1         | 2.1          | 2.6          | 3.5          | 3.7          | 0.9          | 1.1          | 0.1          | 0.6          |
| Mexico          | 1.9   | 2.0          | 0.4          | 1.4          | 0.7          | 1.3          | 0.9          | 0.9          | 1.0          | 1.1          | 1.7          | 1.5          |
| Minnesota       | 1.9   | 2.7          | 1.1          | 1.2          | 0.8          | 0.3          | 0.5          | 0.3          | 7.9          | 7.0          | 0.4          | 0.5          |
| Nevada          | 3.2   | 3.0          | 2.7          | 2.3          | 2.7          | 2.3          | 3.4          | 2.4          | 2.2          | 2.5          | 0.9          | 0.7          |
| Ohio            | 2.0   | 1.8          | 7.4          | 5.5          | 4.4          | 3.7          | 19.0         | 24.6         | 0.9          | 1.3          | 2.2          | 0.8          |
| Ontario         | 1.0   | 0.8          | 0.7          | 0.8          | 3.8          | 3.6          | 3.5          | 2.9          | 1.4          | 0.9          | 43.4         | 46.7         |
| Other Canada    | 0.3   | 0.5          | 0.4          | 0.6          | 0.3          | 0.6          | 0.2          | 0.9          | 0.2          | 0.3          | 11.3         | 15.4         |
| Other States    | 36.4  | 34.9         | 30.9         | 29.7         | 19.9         | 14.5         | 37.8         | 33.9         | 21.6         | 20.8         | 15.7         | 12.0         |
| Overseas        | 3.3   | 2.3          | 2.3          | 2.0          | 2.4          | 1.6          | 2.2          | 2.1          | 3.8          | 1.3          | 8.6          | 6.5          |
| Tennessee       | 1.5   | 2.0          | 5.7          | 5.8          | 2.3          | 1.0          | 6.1          | 3.5          | 0.7          | 1.3          | 0.5          | 0.5          |
| USA Territories | 0.4   | 0.5          | 0.0          | 0.2          | 0.2          | 0.1          | 0.2          | 0.5          | 0.2          | 0.3          | 0.1          | 0.2          |
| Wisconsin       | 10.5  | 11.1         | 2.0          | 0.9          | 1.6          | 1.8          | 0.5          | 1.1          | 40.1         | 39.3         | 0.2          | 0.2          |
| <b>Total</b>    | <b>100.0</b>  | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

A = 1996-1997

B = 2001-2002



# What counties are the most popular destinations?

## Market share, 1996-1997

|                   |      |
|-------------------|------|
| 1. Wayne          | 8.2% |
| 2. Grand Traverse | 6.7% |
| 3. Saginaw        | 5.8% |
| 4. Mackinac       | 4.8% |
| 5. Oakland        | 4.4% |
| 6. Chippewa       | 3.9% |
| 7. Berrien        | 3.1% |
| 8. Kent           | 3.0% |
| 9. Jackson        | 2.6% |
| 10. Washtenaw     | 2.5% |

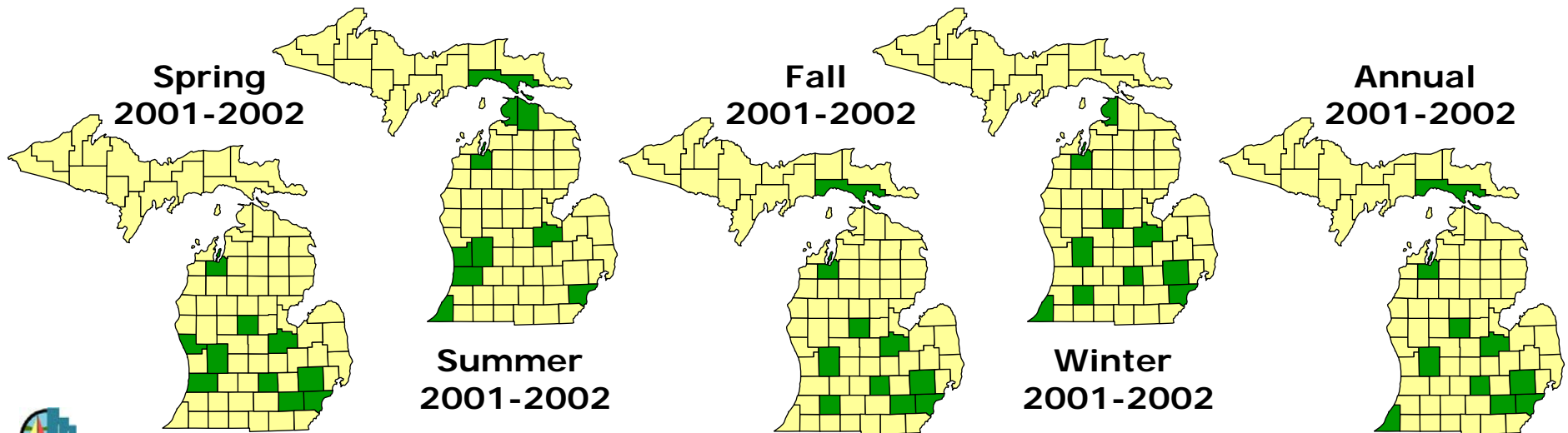
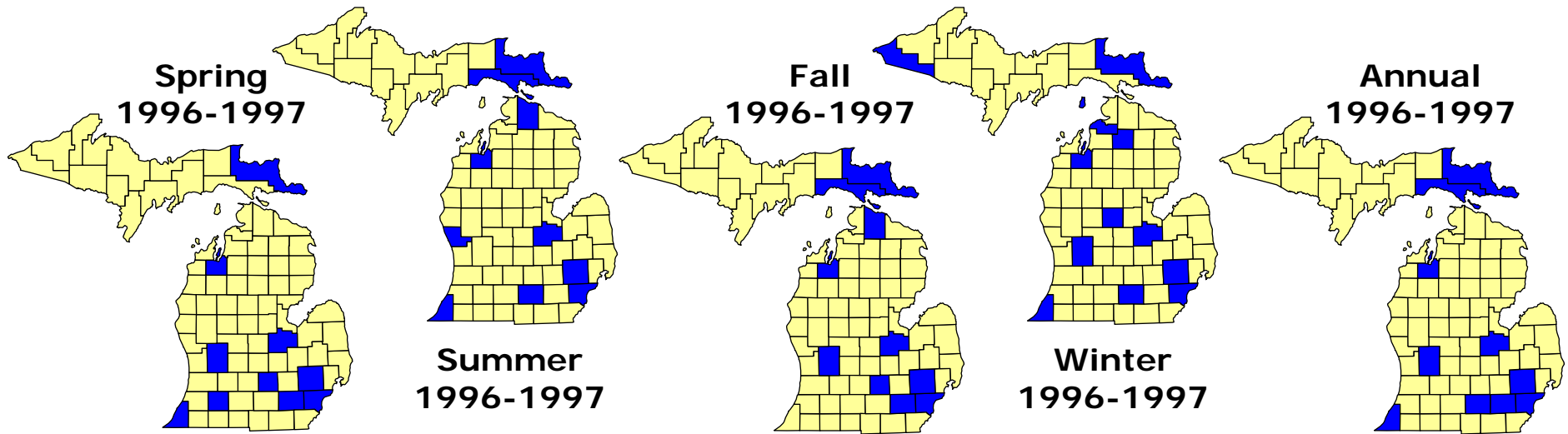
## Market share, 2001-2002

|                   |       |
|-------------------|-------|
| 1. Wayne          | 12.5% |
| 2. Grand Traverse | 5.6%  |
| 3. Saginaw        | 4.0%  |
| 4. Oakland        | 3.9%  |
| 5. Kent           | 3.7%  |
| 6. Berrien        | 3.6%  |
| 6. Ingham         | 3.6%  |
| 8. Mackinac       | 3.5%  |
| 9. Washtenaw      | 2.9%  |
| 10. Isabella      | 2.7%  |



# What counties are the most popular destinations?

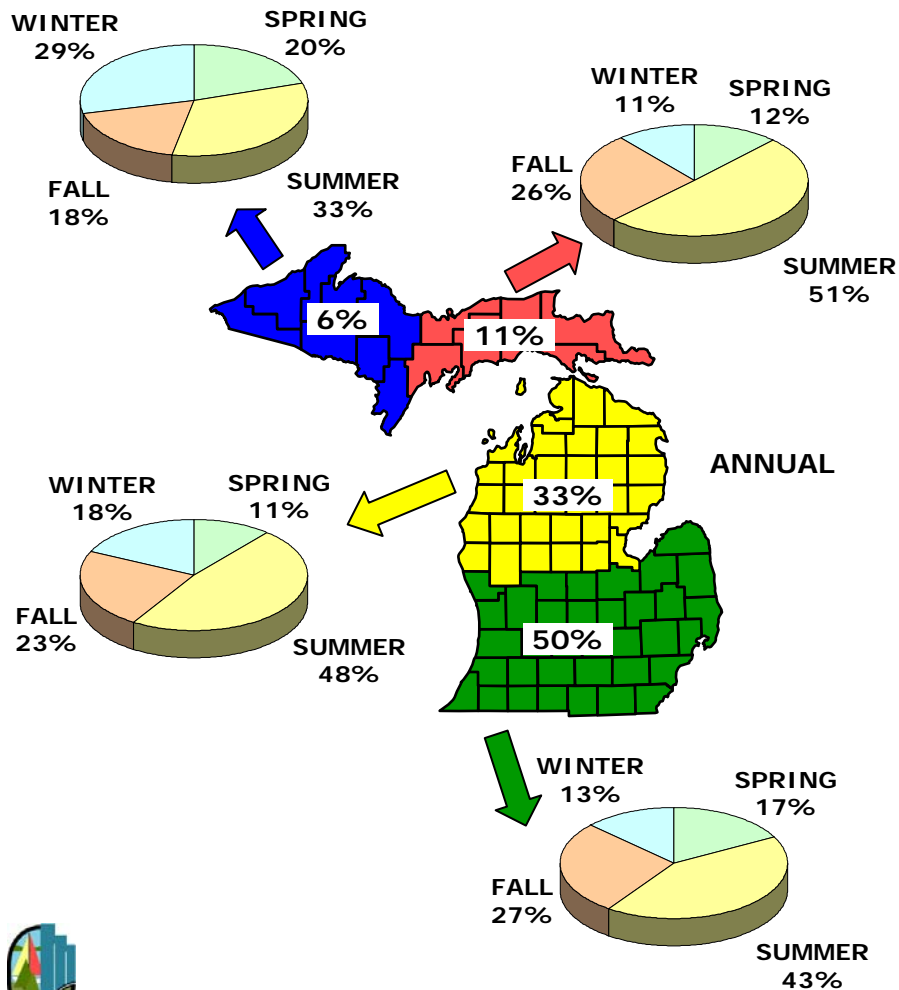
Top 10 counties as primary destinations of pleasure trips, by season and annually



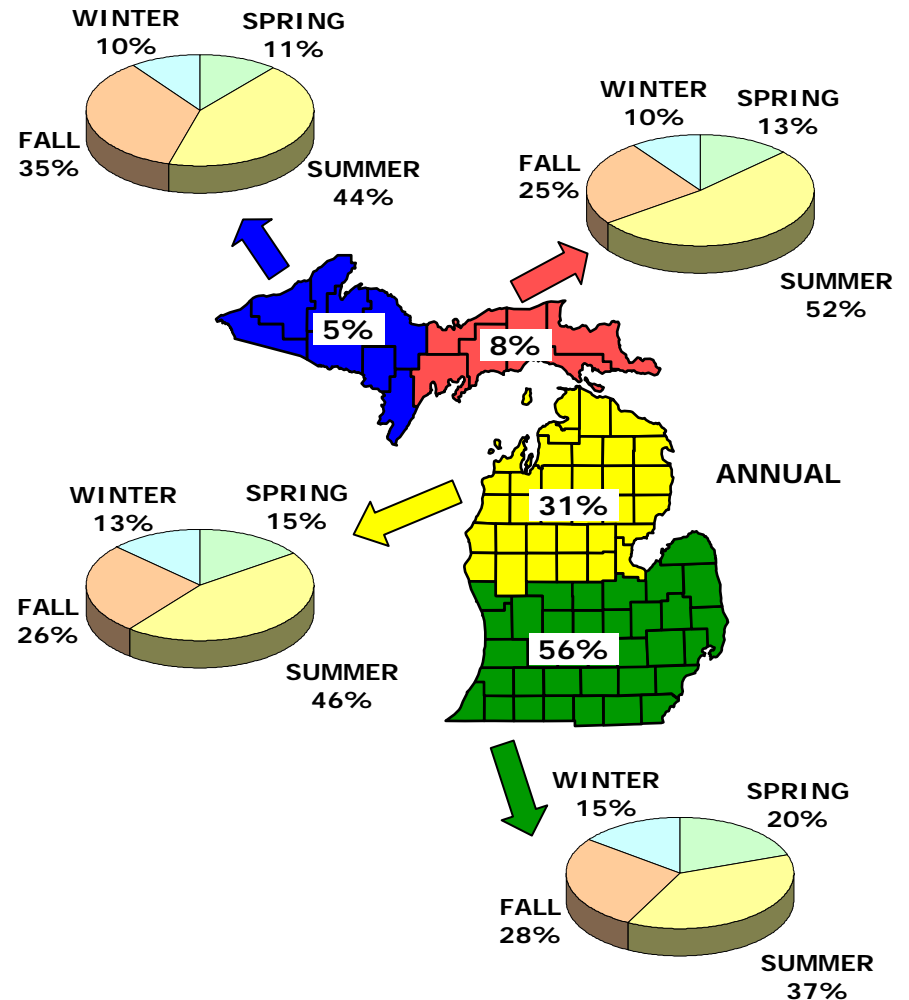
# What are the most popular seasons?

## Seasonal distribution of pleasure trips by region

### 1996-1997

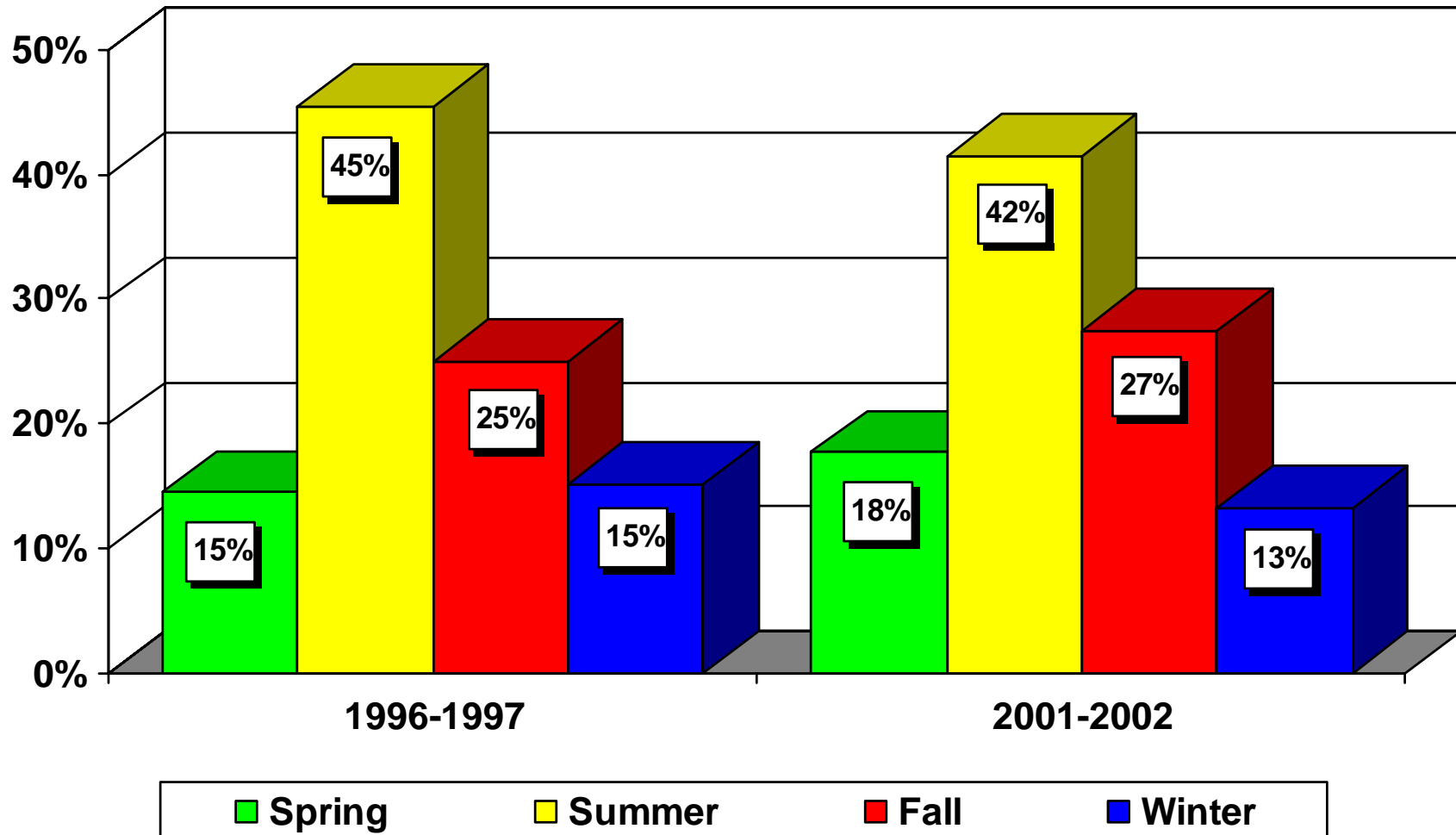


### 2001-2002



# What are the most popular seasons to visit?

Distribution of pleasure trips to Michigan by season



# What are the most popular seasons to visit?

Pleasure trips to Michigan as a percentage of total pleasure trips generated by residents of....

| Season in which trip began | Years   | Illinois | Indiana | Ohio  | Wisconsin | Ontario | Michigan |
|----------------------------|---------|----------|---------|-------|-----------|---------|----------|
| Spring                     | 1996-97 | 8.1%     | 1.7%    | 4.3%  | 4.0%      | 3.7%    | 31.0%    |
|                            | 2001-02 | 8.2%     | 6.6%    | 8.4%  | 7.9%      | 6.7%    | 51.0%    |
| Summer                     | 1996-97 | 8.3%     | 11.3%   | 8.5%  | 6.6%      | 7.4%    | 53.7%    |
|                            | 2001-02 | 11.7%    | 16.9%   | 8.7%  | 12.4%     | 6.3%    | 61.0%    |
| Fall                       | 1996-97 | 9.7%     | 10.3%   | 5.4%  | 5.4%      | 7.0%    | 42.9%    |
|                            | 2001-02 | 9.0%     | 13.8%   | 15.8% | 8.6%      | 5.7%    | 58.6%    |
| Winter                     | 1996-97 | 5.0%     | 8.0%    | 7.3%  | 8.1%      | 2.3%    | 41.8%    |
|                            | 2001-02 | 9.0%     | 10.5%   | 11.9% | 7.0%      | 2.6%    | 46.4%    |
| Annual                     | 1996-97 | 8.0%     | 8.6%    | 6.6%  | 6.0%      | 5.6%    | 44.0%    |
|                            | 2001-02 | 9.8%     | 12.8%   | 10.9% | 9.5%      | 5.6%    | 56.1%    |



# What are the most popular months to visit?

Monthly distribution of pleasure trips generated by residents of Michigan's prime market area to ... (in percent)

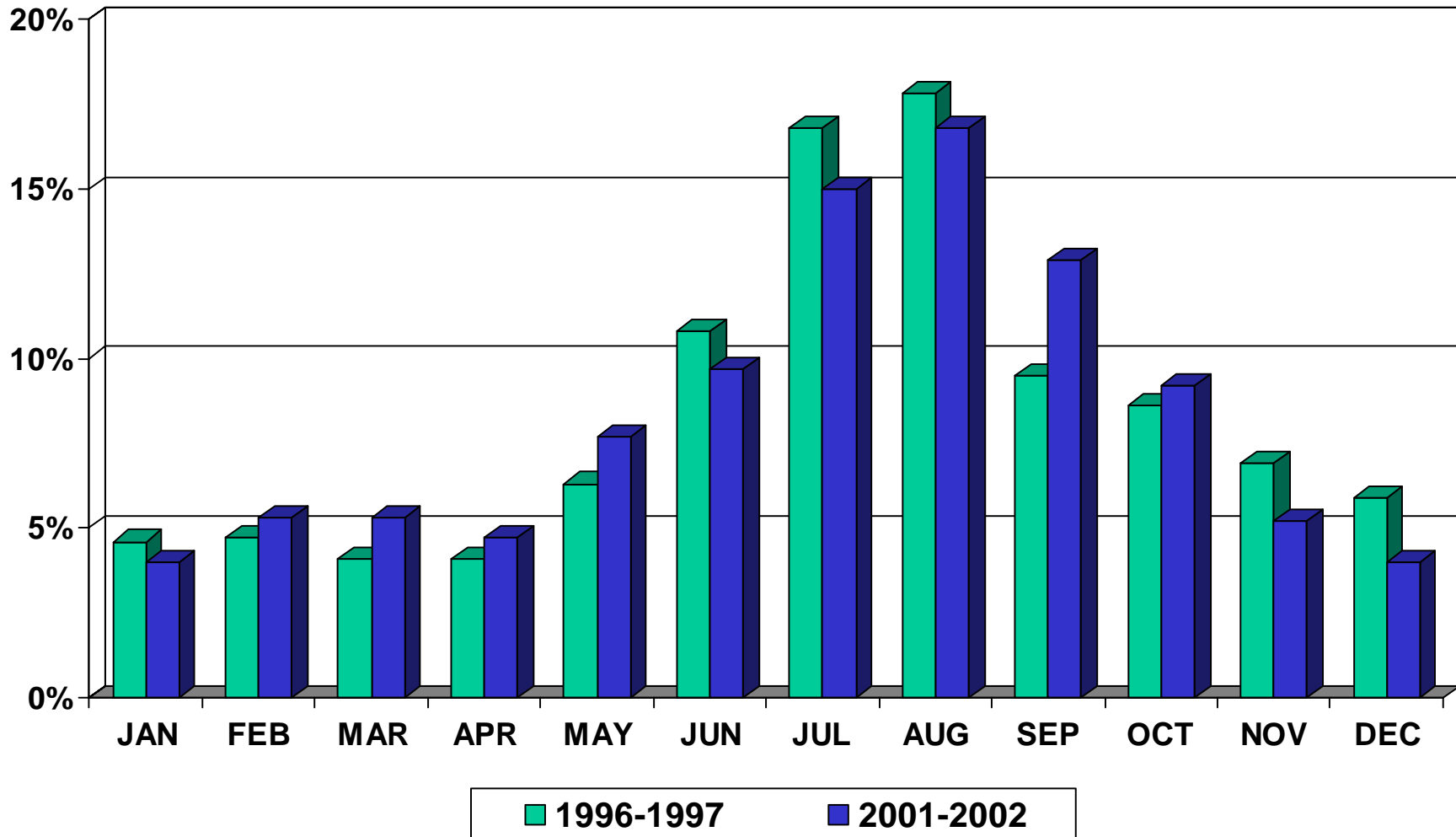
| Month in which trip began | Michigan destination |              | Destination other than Michigan |              | Any destination |              |
|---------------------------|----------------------|--------------|---------------------------------|--------------|-----------------|--------------|
|                           | A                    | B            | A                               | B            | A               | B            |
| January                   | 4.6                  | 4.1          | 5.1                             | 4.6          | 5.0             | 4.5          |
| February                  | 5.9                  | 5.2          | 5.6                             | 5.9          | 5.7             | 5.8          |
| March                     | 4.6                  | 6.1          | 7.9                             | 7.9          | 7.4             | 7.6          |
| April                     | 3.7                  | 4.2          | 6.4                             | 5.9          | 6.0             | 5.6          |
| May                       | 6.0                  | 6.3          | 7.4                             | 7.3          | 7.2             | 7.1          |
| June                      | 9.0                  | 8.8          | 9.8                             | 9.4          | 9.7             | 9.2          |
| July                      | 16.6                 | 14.1         | 13.3                            | 11.8         | 13.8            | 12.2         |
| August                    | 18.0                 | 17.6         | 12.8                            | 14.9         | 13.5            | 15.4         |
| September                 | 9.6                  | 14.5         | 8.8                             | 10.7         | 8.9             | 11.4         |
| October                   | 8.7                  | 9.4          | 9.1                             | 9.3          | 9.0             | 9.3          |
| November                  | 6.8                  | 5.7          | 6.7                             | 6.7          | 6.7             | 6.6          |
| December                  | 6.6                  | 3.9          | 7.0                             | 5.7          | 7.0             | 5.3          |
| <b>Total</b>              | <b>100.0</b>         | <b>100.0</b> | <b>100.0</b>                    | <b>100.0</b> | <b>100.0</b>    | <b>100.0</b> |

A = 1996-1997      B = 2001-2002



# What are the most popular months to visit?

Distribution of pleasure trips to Michigan by month



# During what months do Michigan residents travel out-of-state?

Percentage of Michigan residents' trips to out-of-state destinations, by month

| Month in which trip began | 1996-1997    | 2001-2002    |
|---------------------------|--------------|--------------|
| January                   | 64.5%        | 47.6%        |
| February                  | 56.9%        | 53.7%        |
| March                     | 67.9%        | 50.0%        |
| April                     | <u>78.7%</u> | 54.7%        |
| May                       | 61.1%        | 43.3%        |
| June                      | 58.0%        | 46.7%        |
| July                      | 42.8%        | 40.0%        |
| August                    | 42.8%        | 34.3%        |
| September                 | 51.6%        | 38.2%        |
| October                   | 56.7%        | 39.8%        |
| November                  | 64.1%        | 50.0%        |
| December                  | 54.4%        | <u>58.2%</u> |



# How large are the travel parties and how long do they stay?

Selected characteristics of pleasure trips in Michigan, by season

| Variable                           | Years   | Statistic | Spring<br>(Mar.-May) | Summer<br>(Jun.-Aug.) | Fall<br>(Sep.-Nov.) | Winter<br>(Dec.-Feb.) | Annual |
|------------------------------------|---------|-----------|----------------------|-----------------------|---------------------|-----------------------|--------|
| Number of nights<br>away from home | 1996-97 | Mean      | 3.6                  | 4.3                   | 3.3                 | 2.9                   | 3.7    |
|                                    | 2001-02 | Mean      | 2.8                  | 3.8                   | 3.6                 | 2.7                   | 3.4    |
|                                    | 1996-97 | Median    | 2.0                  | 3.0                   | 2.0                 | 2.0                   | 3.0    |
|                                    | 2001-02 | Median    | 2.0                  | 3.0                   | 2.0                 | 2.0                   | 2.0    |
| Number of nights<br>in Michigan    | 1996-97 | Mean      | 3.4                  | 4.1                   | 3.1                 | 2.8                   | 3.5    |
|                                    | 2001-02 | Mean      | 2.6                  | 3.6                   | 3.4                 | 3.5                   | 3.3    |
|                                    | 1996-97 | Median    | 2.0                  | 3.0                   | 2.0                 | 2.0                   | 3.0    |
|                                    | 2001-02 | Median    | 2.0                  | 3.0                   | 2.0                 | 2.0                   | 2.0    |
| Party size                         | 1996-97 | Mean      | 3.7                  | 3.9                   | 3.3                 | 3.8                   | 3.7    |
|                                    | 2001-02 | Mean      | 3.0                  | 3.7                   | 3.6                 | 3.9                   | 3.6    |
|                                    | 1996-97 | Median    | 3.0                  | 3.0                   | 2.0                 | 3.0                   | 3.0    |
|                                    | 2001-02 | Median    | 2.0                  | 3.0                   | 2.0                 | 3.0                   | 3.0    |



# How much do they spend?

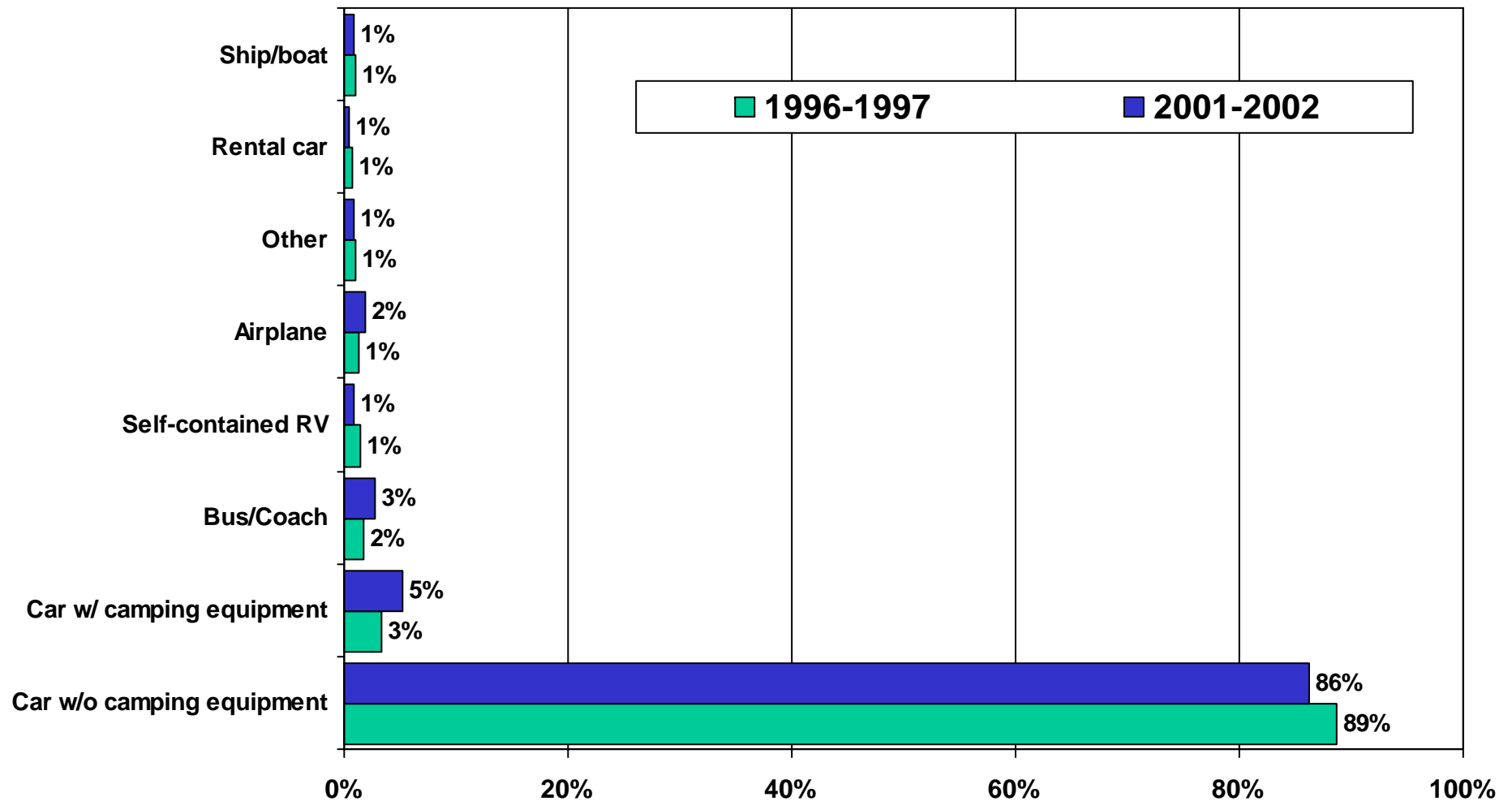
Selected characteristics of pleasure trip in Michigan, by season, cont.

| Variable  | Years   | Statistic | Spring<br>(Mar.-May) | Summer<br>(Jun.-Aug.) | Fall<br>(Sep.-Nov.) | Winter<br>(Dec.-Feb.) | Annual   |
|---|---------|-----------|----------------------|-----------------------|---------------------|-----------------------|----------|
| Overall per trip<br>expenditures<br>in Michigan | 1996-97 | Mean      | \$432.17             | \$547.99              | \$410.93            | \$471.90              | \$485.12 |
|   | 2001-02 | Mean      | \$418.44             | \$510.86              | \$424.82            | \$530.50              | \$473.59 |
|   | 1996-97 | Median    | \$250.00             | \$319.61              | \$300.00            | \$300.00              | \$300.00 |
|   | 2001-02 | Median    | \$300.00             | \$300.00              | \$300.00            | \$300.00              | \$300.00 |
| Overall per day<br>expenditures<br>in Michigan  | 1996-97 | Mean      | \$205.45             | \$180.50              | \$181.05            | \$218.27              | \$189.94 |
|   | 2001-02 | Mean      | \$207.54             | \$194.74              | \$244.50            | \$283.51              | \$222.23 |
|   | 1996-97 | Median    | \$148.29             | \$125.00              | \$122.73            | \$166.67              | \$130.00 |
|   | 2001-02 | Median    | \$166.67             | \$133.33              | \$150.00            | \$200.00              | \$150.00 |



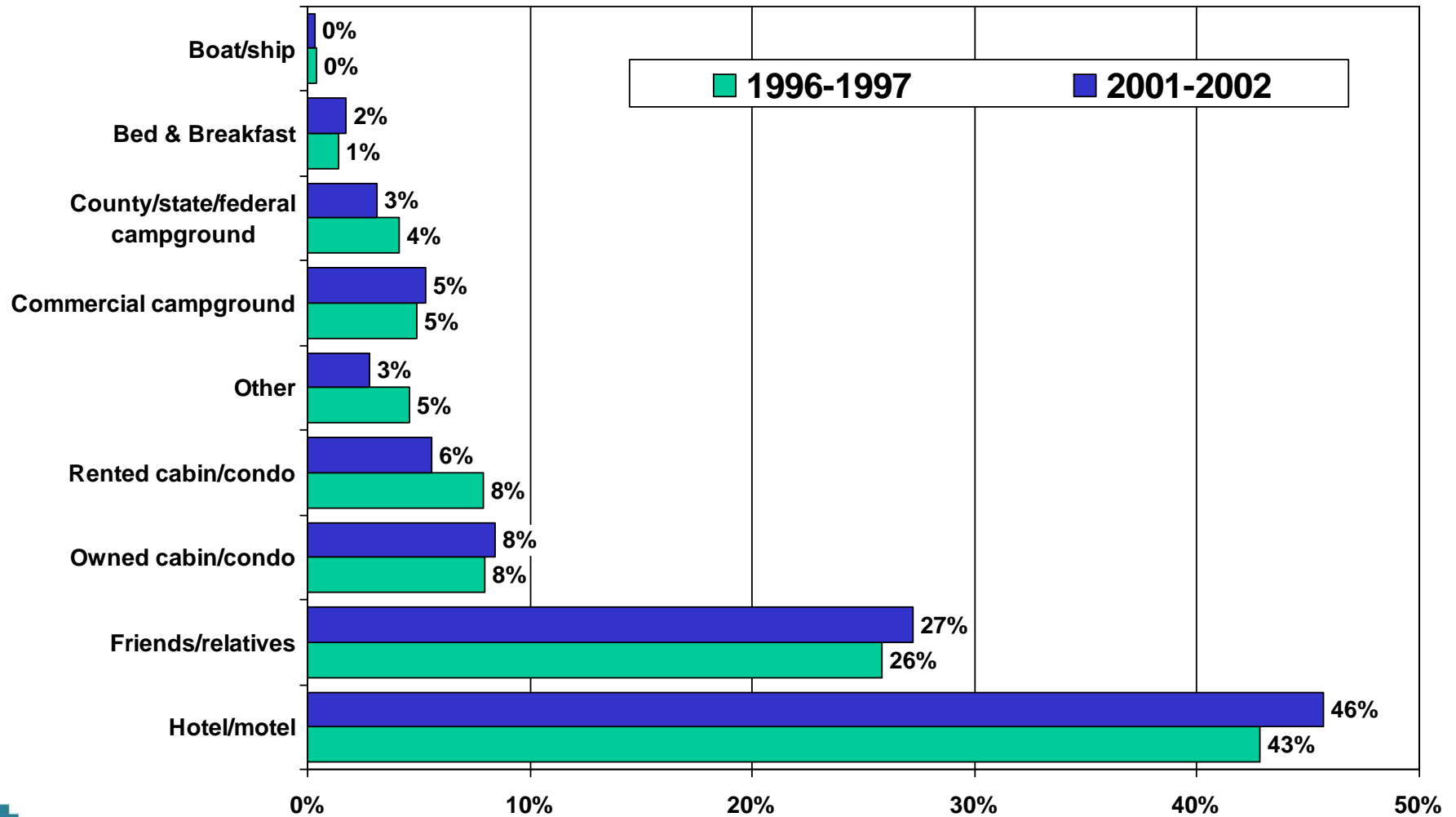
# What types of transportation do they use?

Mode(s) of transportation used by respondents on their most recent pleasure trip in Michigan



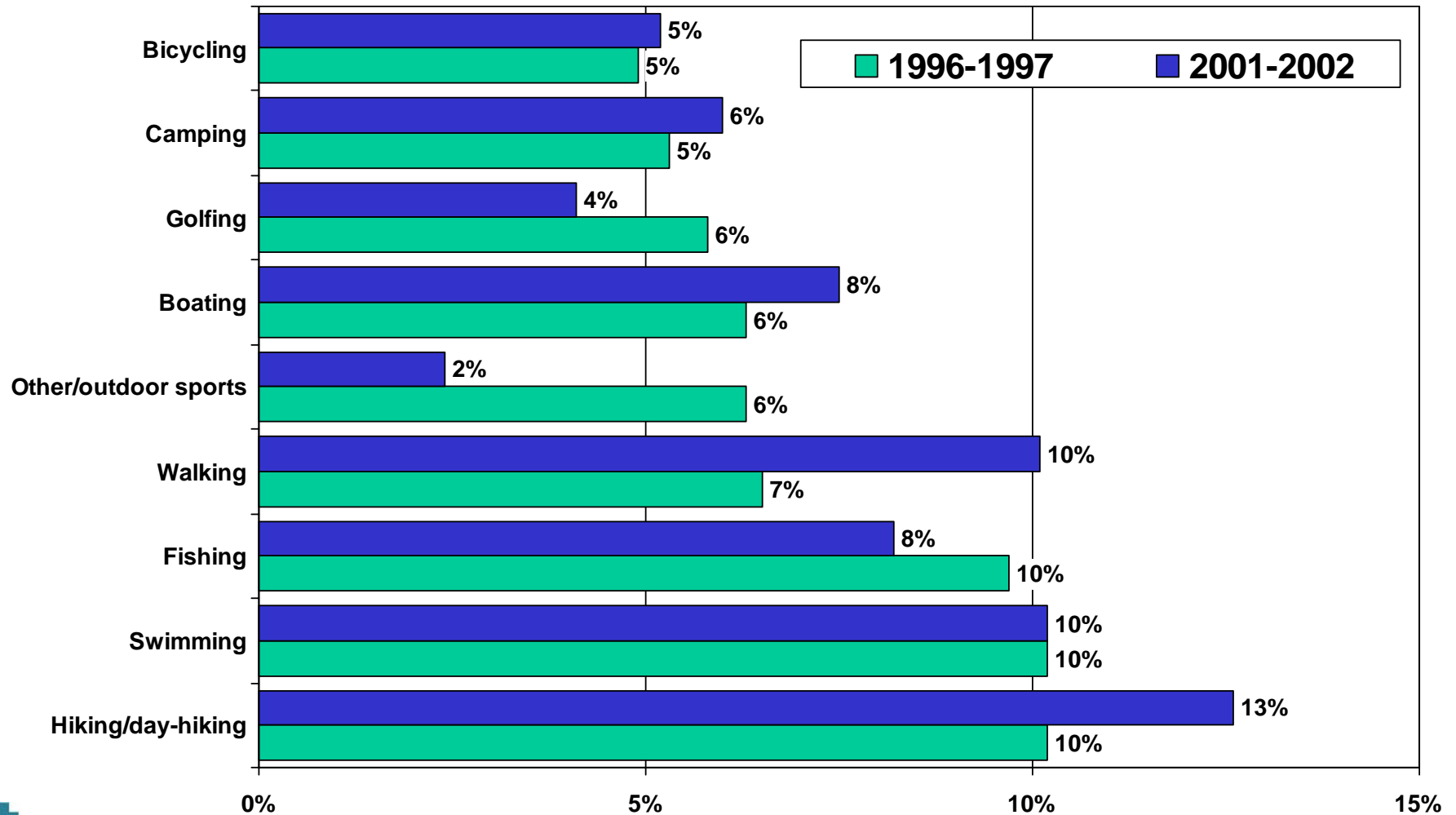
# What types of lodging are used?

Main types of lodging used by respondents on their most recent pleasure trip in Michigan



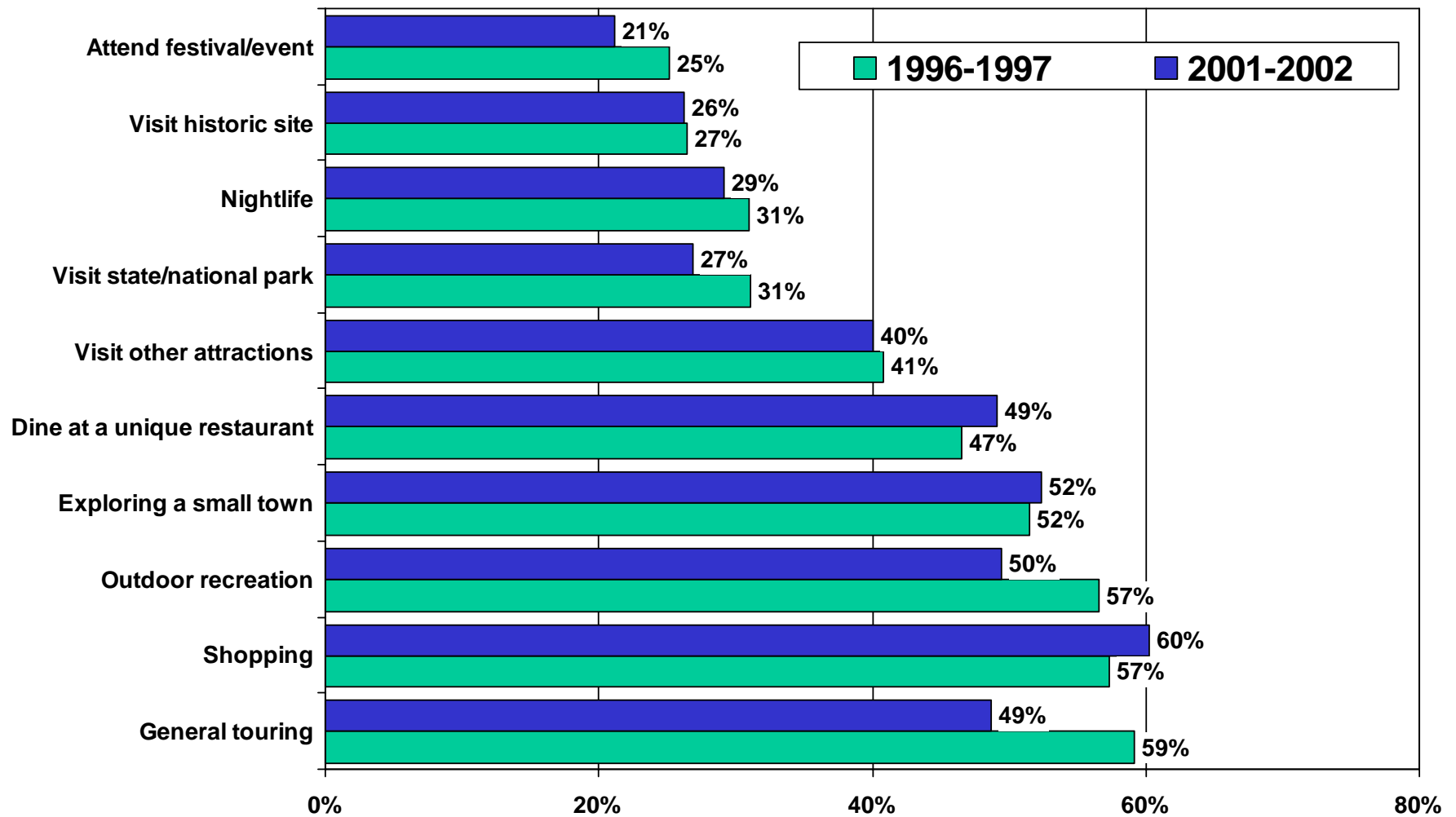
# What outdoor activities do visitors participate in?

Most popular forms of outdoor recreation respondents participated in while on their most recent pleasure trip in Michigan



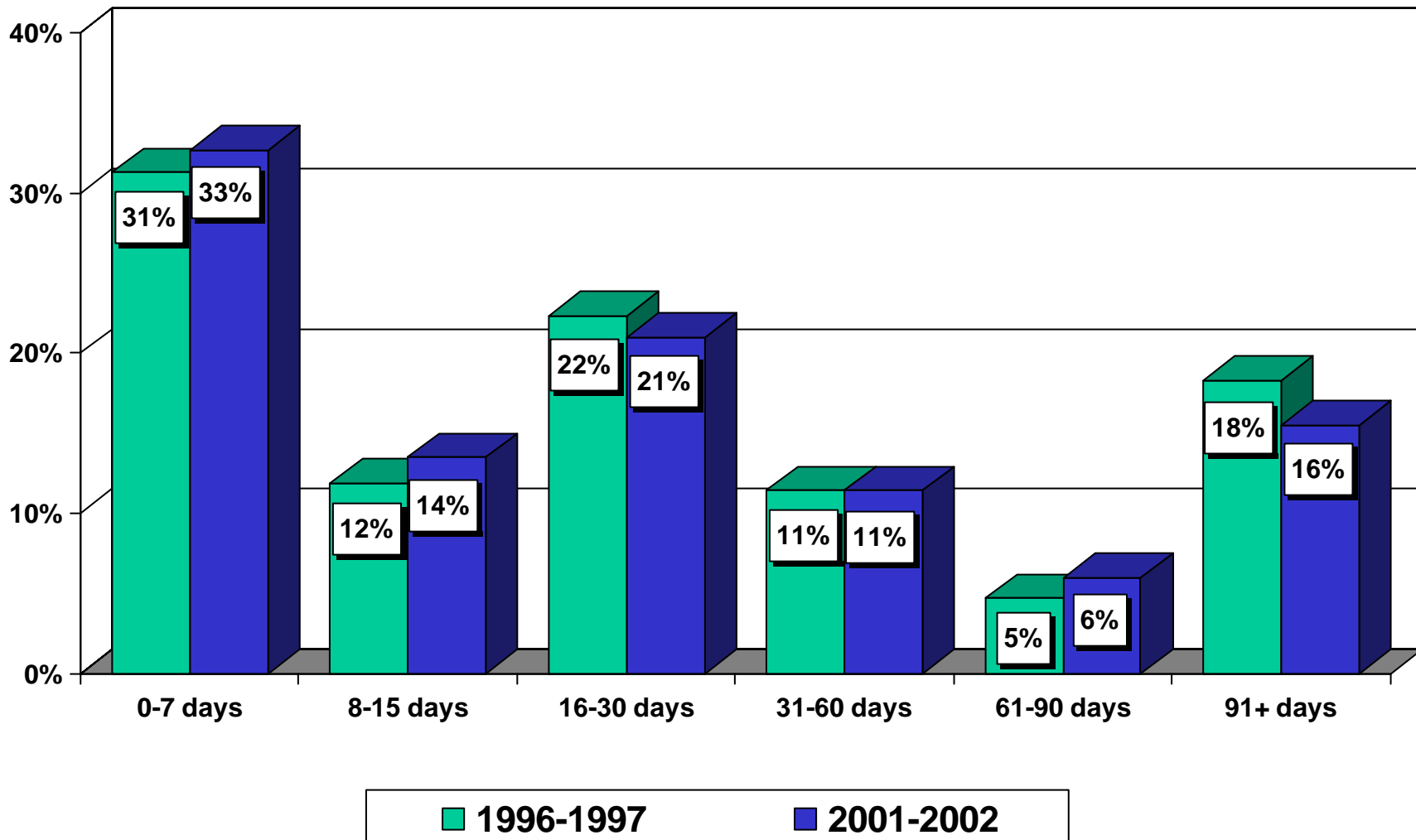
# What activities do visitors participate in?

Recreation activities participated in on most recent pleasure trip to Michigan



# What are the visitors' trip planning horizons?

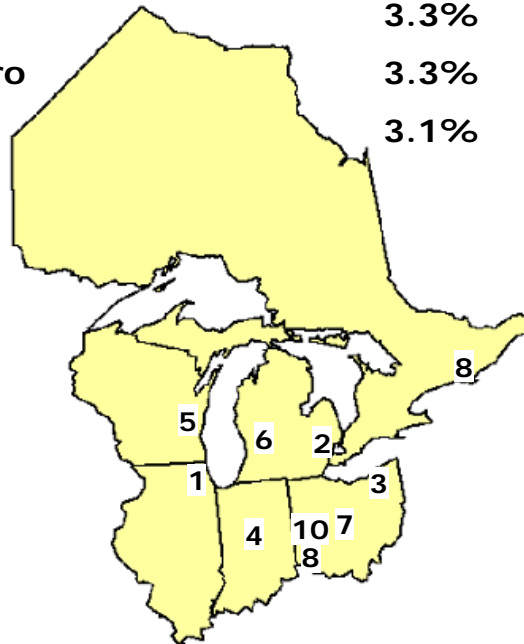
Number of days trip planning began before a Michigan pleasure trip was taken



# What DMAs generate the most trips to Michigan?

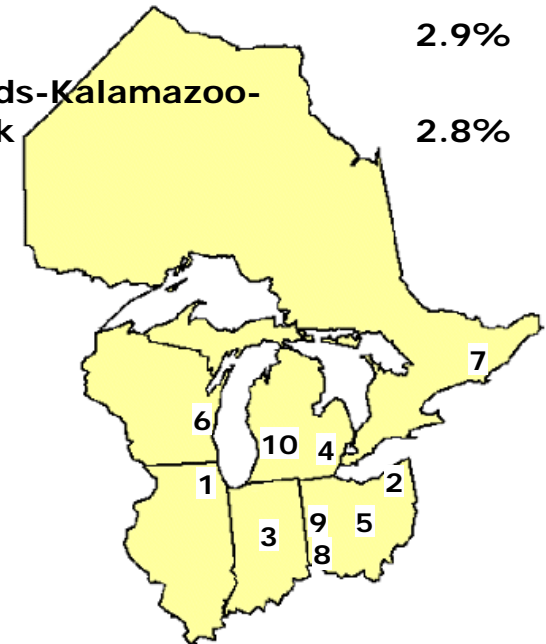
## Top DMAs, 1996-1997

|  |       |
|--|-------|
| 1. Chicago                             | 13.4% |
| 2. Detroit                             | 8.6%  |
| 3. Cleveland                           | 7.4%  |
| 4. Indianapolis                        | 4.4%  |
| 5. Milwaukee                           | 3.9%  |
| 6. Grand Rapids-Kalamazoo-Battle Creek | 3.8%  |
| 7. Columbus, OH                        | 3.6%  |
| 8. Cincinnati                          | 3.3%  |
| 8. Toronto-metro                       | 3.3%  |
| 10. Dayton                             | 3.1%  |



## Top DMAs, 2001-2002

|   |       |
|---|-------|
| 1. Chicago                              | 16.4% |
| 2. Cleveland                            | 7.4%  |
| 3. Indianapolis                         | 5.5%  |
| 4. Detroit                              | 5.0%  |
| 5. Columbus, OH                         | 4.1%  |
| 6. Milwaukee                            | 3.6%  |
| 7. Toronto-metro                        | 3.4%  |
| 8. Cincinnati                           | 3.0%  |
| 9. Dayton                               | 2.9%  |
| 10. Grand Rapids-Kalamazoo-Battle Creek | 2.8%  |



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