

**Travel Michigan
Michigan Travel Business Barometer**

Prepared for:

Travel Michigan



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Prepared by:

Davidson-Peterson Associates

201 Lafayette Center
Kennebunk, Maine 04043

Introduction

Background

Travel Michigan commissioned Davidson-Peterson Associates (DPA) to conduct a study to provide a brief review of the Michigan tourism industry over the past year, as well as a look at 2004 industry projections. To conduct this study, Davidson-Peterson Associates gathered data from two groups – Michigan tourism businesses and potential Michigan travelers.

Methodology

Travel Michigan provided DPA with an industry list of Michigan tourism businesses. From this list, those business listings that included a full contact name and e-mail address were included in the study sample. 1,476 business owners/managers were contacted via e-mail on December 3, 2003 and asked to complete a brief online survey. By December 10th, 365 businesses had completed the survey, for a response rate of 25%. In order to encourage participation, businesses were offered a summary of the results upon completion of the study.

In addition to Michigan tourism businesses, a group of consumers was also surveyed for this study. This sample of consumers was drawn from the Travel Michigan Online Research Panel maintained by DPA. Invitations to participate in this survey were e-mailed to all 5,483 current panelists as of December 3, 2003. By December 10th, 2,273 panelists had completed the survey, for a response rate of 41%.

Executive Summary

Introduction and Methodology

In order to gather data regarding the Michigan tourism industry during 2003 and projections for 2004, Travel Michigan commissioned Davidson-Peterson Associates to conduct a brief online survey. Both Michigan tourism businesses and potential Michigan travelers were surveyed.

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Michigan Tourism Businesses

- Equal proportions of Michigan tourism businesses feel that their business was *better, worse, or the same* in 2003 as it was in 2002. Among those who feel their business improved in 2003, nearly nine-tenths feel it improved by 5% or more (87%). Results are similar for those who feel their business worsened during 2003, with 85% reporting that business was down 5% or more from 2002.

- Business owners/managers are much more optimistic about 2004, with 60% reporting that business for their organization will likely be *better* in 2004 than it was in 2003. One-third feel it will be *the same*, and only 6% feel it will be *worse*. Three-fourths of owners/managers who feel that their business will improve in 2004 say that it will likely improve by 5% or more (77%). One in seven feel it will likely improve by less than 5% (14%).
- When asked what one way Travel Michigan could help their business to be more successful, responses were varied. Overall, the highest proportion of responses centered on *advertising* and *promotions* suggestions.

Michigan Potential Travelers/Consumers

- Nearly all consumers surveyed have traveled in Michigan during 2003 and plan on traveling there in 2004 as well (98%). On average, these panelists intend to travel a bit more in 2004 than they did in 2003 (average of 5.7 trips versus 5.1 trips in 2003).
- On average, travelers spent seven nights lodging in paid accommodations in Michigan during 2003. In 2004, travelers intend to spend a slightly greater number of nights lodging in Michigan.
- The heaviest months for travel in Michigan appear to be June, July, and August, with May, September, and October following close behind. The timing of intended travel in 2004 does not differ much from actual travel in 2003, although increases are strongest in June and July.

SURVEY INSTRUMENTS

Michigan Tourism Business Survey

Thank you for offering to participate in this survey. The survey will take about 5 minutes for you to complete, and will ask you just a few questions about your impressions of the recent tourism business climate and your thoughts about the future. Remember, all of your individual responses will remain strictly confidential, as data will be reported in total only.

Survey ID Number: [_Num]

E-Mail Address: [_1X25]

1. Which of the following categories best describes the type of business you run?
 - Hotel/Motel/Resort/B&B/Inn
 - Campground/RV Park
 - Museum/Historic Site
 - Orchard/Vineyard/Farm/Etc.
 - Family Amusement/Activity Place
 - Retail store/Market
 - Rides – train, carriage, boat, etc.
 - Casino
 - Outdoor Sport – ski mountain, marina, golf course, etc.
 - Other (Please specify: [_1X25])
2. Considering just your own operation, compared to 2002, would you say that your business in 2003 was better, the same, or worse?
 - Better
 - Same
 - Worse
3. Compared to 2002, would you say your business in 2003 [improved/worsened] by:
 - 10% or more
 - 5% to 10%
 - Less than 5%
 - Not sure

4. Now, looking ahead to 2004, do you feel that, compared to 2003, your business is likely to be better, the same, or worse in 2004?
- Better
 - Same
 - Worse
5. Compared to 2003, do you think your business in 2004 is likely to [improve/worsen] by:
- 10% or more
 - 5% to 10%
 - Less than 5%
 - Not sure
6. What one thing could Travel Michigan do to help your business be more successful?
- [_5X45]
7. If your business is a lodging property, how many rooms does your property have available?
- [_Num]
- My business is not a lodging property
8. If your business is an attraction, is it a seasonal or year-round attraction?
- Seasonal
 - Year-round
 - My business is not an attraction

Thank you very much for your time!

Michigan Travel Intentions Survey

Thank you for offering to participate in this survey. The survey will take about 5 minutes for you to complete, and will ask you just a few questions about trips you've taken in Michigan during the past year and your future plans to travel in Michigan. Remember, all of your individual responses will remain strictly confidential, as data will be reported in total only.

Panel ID Number: [_NUM]

E-Mail Address: [_1X25]

1. During 2003, how many overnight pleasure trips have you taken in Michigan? (Please include in this total any trips you have planned for the remainder of December 2003.)

[_Num] →CLICK HERE IF "0" (Skip to Q4)

2. Considering all of these pleasure trips taken in Michigan in 2003, how many nights in total did you spend lodging in paid accommodations in Michigan in 2003?

[_Num]

3. During which months in 2003 did you travel in Michigan? (Please select all months in which you traveled in Michigan for pleasure.)

- January
- February
- March
- April
- May
- June
- July
- August
- September
- October
- November
- December

4. Now, looking ahead to 2004, how many overnight pleasure trips are you likely to take in Michigan in 2004?

[_Num] →CLICK HERE IF "0" ([Skip to Thank You page](#))

5. Considering all of these pleasure trips, how many nights in total are you likely to spend lodging in paid accommodations in Michigan in 2004?

[_Num]

6. During which months in 2004 are you likely to travel in Michigan? (Please select all months in which you are likely to take a pleasure trip in Michigan.)

- January
- February
- March
- April
- May
- June
- July
- August
- September
- October
- November
- December

Thank you very much for your time!

APPENDIX C

DETAILED DATA TABLES