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Results of the Sport Diving and Great Lakes Aquatic Parks Survey

Executive Summary

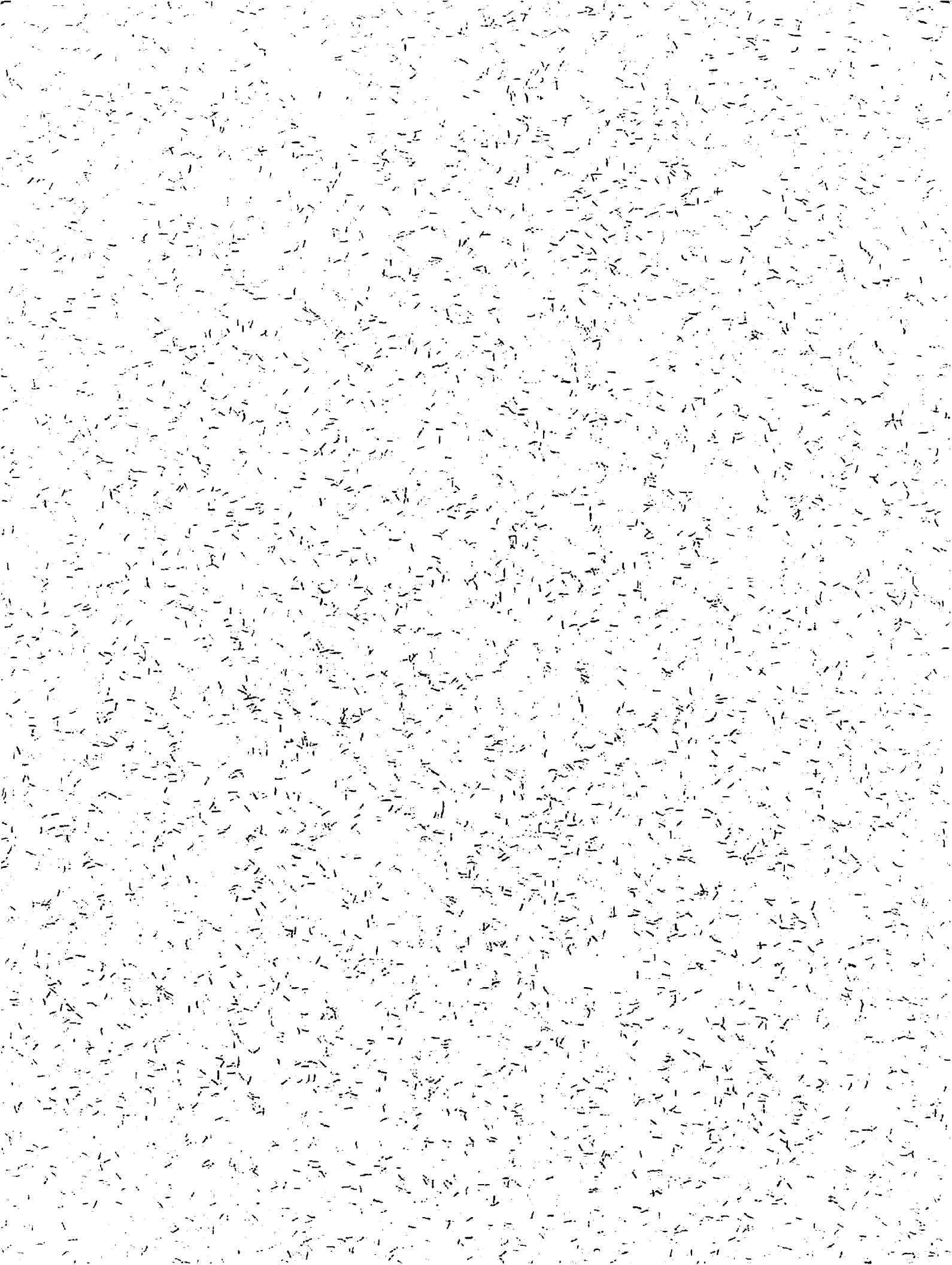


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Michigan Sea Grant College Program

MICHU-SG-92-200ex



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Note: Any information or data used from this survey should be referenced as follows:

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**Michigan Department of Natural Resources, Land and Water Management Division
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Michigan State University Travel, Tourism & Recreation Resource Center
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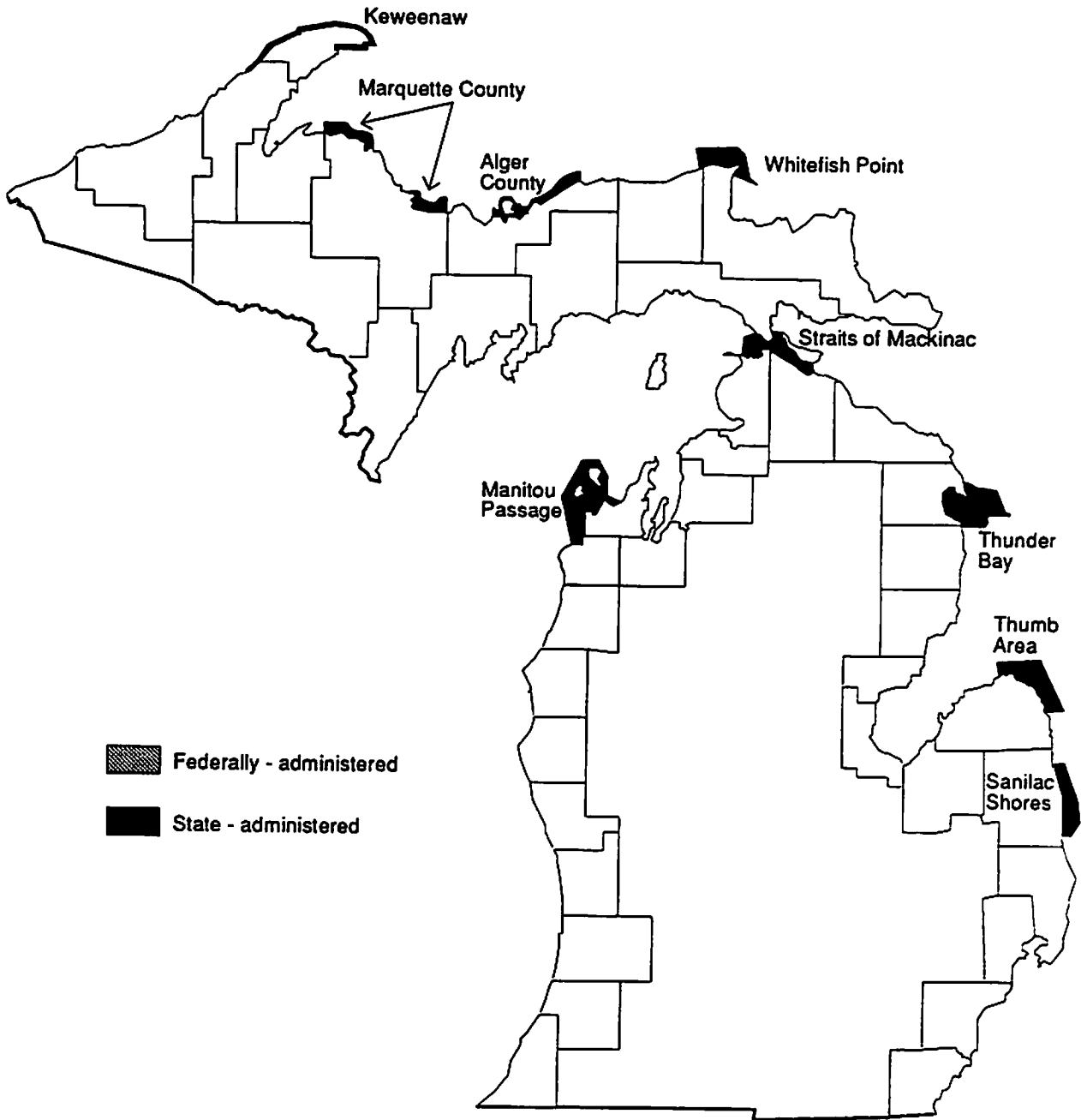
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To obtain a complete copy of the *Results of the Sport Diving and Great Lakes Aquatic Parks Survey* (52+ pages), please contact Michigan Sea Grant Extension at the following address:

Michigan Sea Grant Extension
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Isle Royale
National
Park



MICHIGAN UNDERWATER PRESERVES

NEEDS FOR THE SURVEY

- Cooperative advertising and marketing
- Underwater preserves vs aquatic parks
- Lack of quantitative survey results on sport diving populations

GOALS

Provide data on a large population of sport divers, for the following reasons.

- Marketing underwater preserves as tourism destination areas
- Planning and designing services, facilities and attractions
- Defining the concept of a Great Lakes aquatic park

WHY SUBSCRIBERS TO *SKIN DIVER* MAGAZINE?

- Attractive population for travel & tourism marketing
- Geographic proximity to the Great Lakes
- Direct access to advertising and publicity
- Diverse sport diving affiliations and characteristics
- Interest of the Michigan Underwater Preserves Council, Inc.
- Support of *Skin Diver* Magazine

METHODS

Survey Instrument Design

- Literature review
- Research questions
- Expert review
- Pretest analysis
- In-depth interviews
- Expert review

Sampling Design

- *Skin Diver* magazine subscriber list
- Regional segmentation (5 administrative regions)
- Systematic sample with random start
(sample size of 2,000)

Survey Implementation

(1991)

- Two complete bulk rate mailings
(41% return rate)
- Data entry and analysis (SPSS)
- Nonrespondent telephone survey
- Bias (gender; subscriber vs reader; inexperience with Great Lakes)

RESULTS AND DISCUSSION

Demographics

Results:

- Primarily male (82%), age 27-45 (66%)
- Well-educated (52% completed a college degree)
- Nearly 70% have an annual household income of \$45,000 or greater
- Travel and tourism life-style:
 - "late baby boomers" (37%)
 - "early baby boomers" (29%)

Discussion:

- *Consistent with Skin Diver magazine survey*
- *Diversity in characteristics*

Scuba Diving Background

Certification Level:

- Open water (47%)
- Advanced (32%)
- Professional (12%)
- Other (9%)

Years Sport Diving:

- 1-3 years (34%)
- 4-9 years (40%)
- 10 or more (25%)

Annual Sport Diving Activity:

- 0-5 dives (36%)
- 6-20 dives (40%)
- 21 or more (23%)

Discussion:

- *Diversity of experience and activity level*
- *Marketing and service provision by experience/activity level*

Sport Diving Trip Background

Annual Frequency of Sport Diving Trips:

- None (17%)
- 1-2 trips (40%)
- 3-4 trips (20%)
- 5 or more (22%)

Annual Frequency of U.S. Trips:

- None (35%)
- 1-2 trips (33%)
- 3-4 trips (15%)
- 5 or more (17%)

Annual Frequency of Great Lakes Trips:

- None (91%)

Discussion:

- *Need to demonstrate value in sport diving at domestic destinations and Great Lakes in particular*
- *Marketing to high vs low trip activity segments*

Benefits of Sport Diving

Results:

- The most important personal benefits:
 - 1) Experiential (i.e. exploration, enjoyment, escape from routine, fantasize)
 - 2) Stimulation (i.e. excitement, exploration)
 - 3) Independence/freedom
 - 4) Therapeutic/healing (i.e. relaxation)
- Most respondents indicated that freedom of choice (86%) and feeling of independence (72%) were very important or crucial
- Nostalgia (i.e. "going back in time," learning about maritime history or historic ship construction) and commodity related (i.e. collection, fishing) seem to be the least important personal benefits
- Risk-taking (which may be defined as an extreme form of stimulation) was very important or crucial to 23% of respondents

Discussion:

- *Diversity of benefits sought*
- *Marketing and service provision by benefits sought*

Beliefs about Great Lakes Sport Diving and Tourism

Strong Positive Beliefs

Most respondents agree that:

- There are numerous geologic features to explore
- People in local communities are friendly
- There are numerous recreational activities in addition to diving in which to participate

Most respondents disagree that:

- The Great Lakes region is too isolated
- Travel costs to the Great Lakes are too expensive
- The Great Lakes are too polluted to safely dive
- The shipwrecks are too deep to explore

Negative Beliefs

Most respondents disagree that:

- Underwater visibility is excellent for sport diving
- Access to shipwrecks is not restricted by regulations

No Opinion Responses

- 13 of 21 statements elicited no opinion responses that total over 40%

Discussion:

- *General lack of knowledge on Great Lakes sport diving and tourism*
- *Most respondents (that could answer true or false) have positive beliefs about Great Lakes sport diving and/or tourism*
- *Opportunity to increase awareness and competitive advantage over other domestic tourism destinations*

Attributes of a Great Lakes Aquatic Park

Results:

- Services and facilities that directly support sport diving participation appear to be most important (i.e. air compressor station, full service dive shop, information center, (800) number, mooring buoys)

- Services and facilities that support visitor safety programs appear to be the next important category (i.e. emergency medical services, hospital, boater search and rescue service, recompression chamber)

- The quality of the water-based diving experience may be strongly related to:
 - 1) good water visibility
 - 2) dive sites with intact or relatively undisturbed resources
 - 3) diving that is free of user conflict

- Most respondents prefer travel by private automobile
- A variety of lodging alternatives are needed
- Preference for information related directly to scuba diving activities
- 75% would rent one or more pieces of scuba equipment
- A variety of boat transportation alternatives are needed, but respondents favor smaller charter boats
- Biological and geological dive sites preferred over shipwreck and other historical sites
- Most respondents prefer dive sites at a depth less than 100 feet
- Preference for other recreational activities that are complementary to sport diving
- Approximately 20% are interested in avocational educational experiences

Discussion:

- *Diversity of attributes sought*
- *Marketing and service provision by attributes sought*

Aquatic Park Development and Management

Conversion of Underwater Preserves to Aquatic Parks:

- Key characteristics of underwater preserves:
 - 1) Protection of resources through a "leave it alone" policy
 - 2) Limited resource management programs
 - 3) Sport diving is permitted but not encouraged *

- Key characteristics of aquatic parks:
 - 1) Provision of a diversity of services and facilities
 - 2) Significant resource management programs to protect resources and enhance visitor satisfaction
 - 3) The encouragement of sport diving

- *Nearly all respondents (93%) favored conversion to aquatic parks and were willing to pay an average of \$ 13.50 for a daily use permit*

* Although the private sector encourages and promotes sport diving within the underwater preserves, the intent was to characterize the present status of state management

Preferences for Organizational Development/Management:

- 1) Private-government cooperation (46%)
- 2) State government (22%)
- 3) Private non-profit (18%)
- 4) Other organizations (14%)

- 58% of respondents agree that government should provide only those services/facilities/attractions which the private sector cannot profitably provide.

Attitudes Toward User Fees:

- Most respondents (85%) agree that government should charge the user only an amount needed to cover the costs of providing services/facilities/attractions at an aquatic park

Attitudes on the Removal of Shipwreck Artifacts:

- Over two-thirds of respondents (68%) agree that sport divers should not be allowed to remove shipwreck artifacts from a Great Lakes aquatic park under any circumstances

Discussion:

- *Willingness to pay assumes that visitors receive satisfying tourism and recreation experiences from a certain bundle of services/facilities/attractions*
- *Aquatic parks seem to provide value to this population*
- *Opportunity for private-public partnerships*
- *Need for innovative resource protection strategies*

CONCLUSION

- Results indicate that this population is not homogeneous; *Skin Diver* magazine subscribers are comprised of diverse sport diver markets
- This population can be segmented for the purpose of target marketing
- Target marketing depends on the mission, goals and objectives of the involved organization
- An important barrier to the use of a target marketing approach involving common property resources is organizational culture within government agencies
- The results from this survey are part of an assessment for the development of Michigan underwater preserves

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