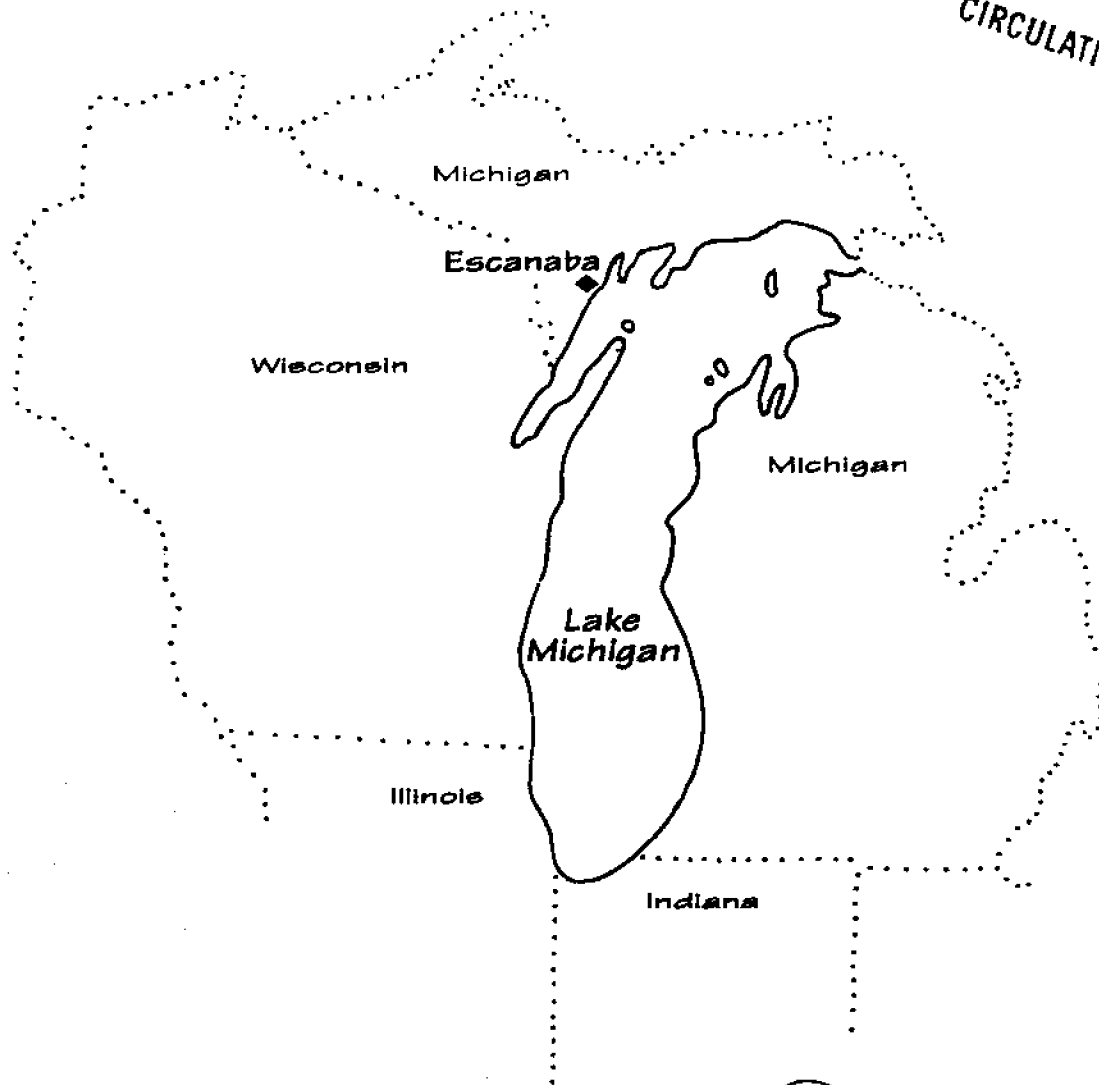


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A Comparison of the Escanaba 1988 and 1992 Transient Boater Marketing and Economics Surveys

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Michigan Sea Grant College Program

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***A COMPARISON OF THE ESCANABA
1988 AND 1992 TRANSIENT BOATER
MARKETING AND ECONOMICS SURVEYS***

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A Comparison of the Escanaba 1988 and 1992 Transient Boater Marketing and Economics Surveys

Abstract. A marketing study of transient boaters at Escanaba marina is described. Survey methods are briefly presented along with findings in five major areas: (1) characteristics of transient boats and boaters, (2) market areas and travel patterns, (3) information sources, (4) boater spending and local economic impact, and (5) boater preferences and evaluation of marina attributes and services. Guidelines and recommendations are given for the use and application of the findings.

INTRODUCTION

Michigan has extensively studied registered boats and boats stored in seasonal slips at marinas. The most recent studies were conducted by Stynes et al. (1982, 1983) in 1980 and 1981 under Michigan Sea Grant program funding and by Talhelm et. al. in 1986 and 1987 with funding from the Michigan Department of Natural Resources and Michigan Boating Industries Association.

While providing excellent information on the boating fleet, these studies have provided little detailed information on the transient boating market. The term "transient" refers to boats or boaters on overnight trips away from their home port. The Michigan Department of Natural Resources in cooperation with coastal communities manages public marinas on the Great Lakes for the purpose of providing shelter and facilities for transient boaters. Private marinas and others like the Huron Clinton Metropolitan Park Authority also provide facilities and services for transient boaters in Michigan.

In 1988 research was initiated to better understand the transient boater market. A survey of transient boaters was carried out at Escanaba, Gladstone, and Fayette State Park during the summer of 1988. The results are presented in Stewart, Stynes and Mahoney (1988). Upon completion of that survey, the study was extended to other marinas in Michigan in order to assemble a more complete statewide profile of the transient boater market.

The Michigan Sea Grant Extension Program and Michigan State University Agricultural Experiment Station assembled funds to conduct a similar survey in 1989 at six different marinas. These marinas were chosen to represent more of the diversity of Michigan marinas in terms of location, clientele and facilities (Stewart and Stynes, 1990).

The marinas studied in 1988 were all located in the Bay de Noc region of Michigan's Upper Peninsula. They are relatively small marinas drawing over 60 percent of their transient customers from Wisconsin and Illinois. Due to these unique characteristics, the results could not be readily applied to other marinas around the state.

As the budget for the 1989 survey was limited, marina selection also depended heavily on cooperation and interest of the local Sea Grant Advisory agents and the individual marina managers. Marinas participating in the survey in 1989 were Grand Haven, Muskegon, Leland, Sault Ste. Marie, DeTour, and Metro Beach Metropark. Metro Beach is operated by the Huron Clinton Metropolitan Authority and is located within Metro Beach Metropark. Grand Haven, Muskegon, and Leland marinas are operated jointly by Recreation Division, Michigan Department of Natural Resources (MDNR) and the local communities, and the DeTour marina is operated solely by MDNR. Sault Ste. Marie has two facilities, a private marina in town and a city/MDNR marina just outside of town. The majority of questionnaires completed at Sault Ste. Marie were from the private marina.

Escanaba had a need for information on how much the transient boater markets and economics changed over time. Thus data acquired from this 1992 study was compared to the original data acquired from the 1988 study in Escanaba marina.

METHODS

Survey methods closely paralleled the 1988 and 1989 study design, which was reasonably successful. Marina personnel were responsible for distributing a four page self-administered questionnaire to a random sample of skippers of boats registering at their marina for an overnight stay. Questionnaires could be returned to the marina prior to departure or by return mail using a business reply envelope that was provided.

Sample

Sampling procedures were designed to obtain a representative sample of boats registering at the marina for an overnight stay. For the Escanaba marina the boaters were sampled systematically as they registered with the Harbormaster. Transient use statistics from 1991 at Escanaba were used to calculate a sampling interval to yield approximately 200 surveys distributed. Marina personnel distributed a questionnaire to every second boater registering for one or more nights. Table 1 reports the sampling intervals and response rates in 1988 and 1992.

Instrument

The 1989 survey instrument was modified slightly for 1992. The survey in 1992 also requested information from transient boaters on primary destination.

Study Objectives

- (1) To describe the characteristics of transient boats and boating parties.
- (2) To measure patterns of transient boating including characteristics of the present trip and general patterns of transient boating last year.
- (3) To identify the primary sources of information used by transient boaters to find out about the marina and the local community.
- (4) To estimate spending by transient boaters in the marina and the local community.
- (5) To measure the importance of marina attributes to transient boaters and to evaluate facilities and services for transients.
- (6) To compare the 1988 findings with the 1992 survey results.

RESULTS

We briefly describe the results within five areas defined by our primary objectives: (1) characteristics of boats and boaters, (2) market areas and travel patterns, (3) information sources, (4) boater spending and local economic impact, and (5) boater preferences and evaluation of marina attributes and services. We rely heavily on tables, most of which are self-explanatory. Only highlights are discussed in the text with comparisons between the 1988 and 1992 surveys. General guidelines on the implication and application of findings are presented in italics at the end of each section.

Response Rate. We received a total of 93 usable questionnaires from the Escanaba marina for an overall response rate of 42%. This compared to 29% response rate in the 1988 survey. (Table 1) The budget did not permit extensive monitoring of distribution procedures or follow-ups to increase the response rate. Comparisons with harbor statistics indicate the samples are reasonably representative by month, boat type and size. We have not made any adjustments for the different sampling rates, lengths of stay, or frequency of trips. A number of findings are quite similar at the Escanaba marina, as well as with the nine marinas studied in 1988 and 1989. Also, variation across the nine facilities surveyed to date provides a good initial picture of differences across the state. Readers familiar with these facilities can identify initial hypotheses about how these characteristics vary with location and site characteristics.

Table 1. Questionnaire Distribution and Response by Year in Escanaba

Year	Sampling Interval	Surveys Distributed	Surveys Returned	Response Rate
1992	2	223	93	42
1988	1	344	101	29

Characteristics of boaters and boats. Characteristics of transient boaters and boats are fairly similar in 1988 and 1992. Skippers are almost all male, predominantly 40 to 69 years of age. The average age of the skipper was 54 in 1992 while the average age of all members of the boating party was 43. The average party size in 1992 was 2.5 with two-thirds of all parties consisting of two people. More than three-fourths of the transient boating parties do not have children (age 19 or under) aboard. Crew members are primarily adults, but represent all ages. Although skippers are almost all male, crews bring the ratio of men to women on transient boats to 1 to 2.5 (Table 2).

Almost two-thirds of the skippers had over 20 years of boating experience in 1992 compared to half in 1988. Well over half of the crew had more than ten years experience in 1992. On a scale of 1 (beginner) to 7 (expert), most skippers rated themselves from 5 to 7 in 1992 (Table 3).

Almost two-thirds of the boats surveyed in 1992 were power boats, compared to just over half in 1988 (Table 4). Most boats used on overnight trips are stored in the water, usually at a seasonal slip in a marina (Table 5).

The profiles of boats and boaters describe the market you currently serve. Comparisons with the totals of other marinas can reveal market segments you tend to attract more or less than other marinas. These differences may be due to your facilities, promotion/information, or your location. Understanding of the people you are serving is important both for designing facilities and services. Skippers are almost all middle aged men, while boating parties represent all ages and are divided among men and women 1 to 2.5. Age groups prominent among transient boaters will grow substantially during the 1990s, as the leading edge of baby boomers reach age 50 in 1995.

Table 2. Party Characteristics by Year in Escanaba

	1988	1992
	Party Size (%)	
People		
1	1	5.4
2	49	63.4
3	14	9.7
4	30	16.1
5+	7	5.4
	Skipper Age (%)	
Years		
<30	0	0
30-39	13	7.7
40-49	41	27.5
50-59	30	37.3
60-69	15	22.0
70+	2	5.5
	Crew Age (%)	
<10		4.9
10-19		12.0
20-29		6.3
30-39		9.2
40-49		23.2
50-59		32.4
60-69		9.2
70+		2.8
	Gender (%)	
Skipper		
Male		98.9
Female		1.1
Crew		
Male		28.0
Female		72.0

Table 3. Boating Experience and Skill of Transient Boaters by Year in Escanaba

	1988	1992
Boating Experience (%)		
Skipper		
0-5 years	5	2.2
6-10	11	12.2
11-15	14	7.8
16-20	19	13.3
21+	51	64.4
Crew		
0-5 years		21.6
6-10		21.6
11-15		18.0
16-20		13.6
21+		25.2
Skipper's Boating Skill* (%)		
1	2	0
2	2	0
3	16	1.1
4	47	6.8
5	33	25.0
6	*	45.5
7	*	21.6
Total	100	100.0

a. Average ratings where 1=Beginner, 7=Expert

*Ratings of 6 and 7 were not included in the 1988 survey.

Table 4. Transient Boat Characteristics by Year in Escanaba

	1988	1992
Boat Length (%)		
17-25 ft.	19	14.0
26-30	36	43.0
31-35	33	18.3
36-40	8	13.9
41+	5	10.8
Total	100	100.0
Boat Draft (%)		
<3 ft.	9	6.6
3	36	37.4
4	24	26.4
5	18	18.7
6	11	6.6
7+	3	4.4
Total	100	100.0
Primary Propulsion Type (%)		
Power		
Inboard	36	35.4
I/O	0	28.0
Outboard	20	1.1
Total Power	56	64.5
Sail		
Gas aux.	23	17.2
Diesel	18	18.3
No aux.	5	0.0
Total Sail	46	35.5
All Boats	100	100.0

Table 5. Transient Boat Ownership and Storage

	1988	1992
Boat Ownership (%)		
Owned	91	97.8
Chartered	6	1.1
Borrowed	3	1.1
Total	100	100.0
Boat Storage During the Boating Season (%)		
In Water	89	89.2
At Marina	75	75.0
Seasonal Slip		68.8

Travel Patterns. Travel patterns of transient boaters are captured by examining the boater's permanent residence, where the boat is stored, where the trip began, the previous and next stops, and primary destination on this particular trip. Patterns vary quite a bit with the location of the marina relative to major markets. Northern marinas attract boaters from a wide geographic area. For example, Wisconsin and Illinois are important markets for Escanaba. Almost one-third of the transient boaters came from the Green Bay, Wisconsin area. (Table 6).

About two-thirds or more of boaters at Escanaba are either coming from or going to another port. The vast majority of boaters are on extended trips (Table 7). Over half of the visits to the Escanaba marina were made during July in 1988 and 1992. The majority of the boaters surveyed arrived at the marina between 11 a.m. and 6 p.m. The average boater spent 1.5 nights at Escanaba marina in 1992 compared to 1.8 nights in 1988. Just over one-third of the boaters in 1992 indicated that Escanaba was their primary destination.

Table 8 provides details for Escanaba marina on the distribution of visitors by storage location, trip origin, the previous and next stops, and primary destination.

Transient boaters are active boaters. About nine out of ten took an overnight boating trip during the previous year with most reporting several trips. About one-third of the trips were less than 50 miles and 17 percent were more than 100 miles. Boaters were away from home port an average of 17.5 nights with over a quarter away 22 or more nights (Table 9).

Origins of boaters identify key markets in which you may wish to promote. You may also wish to provide information about your marina in harbors that are within a one day cruise, both to reach short trip boaters and to reach boaters on extended cruises headed in your direction. Needs of boaters on extended trips will vary from those on shorter trips. If you do not get a lot of repeat traffic, you may be doing something wrong. Also, first time visitors will have more basic information needs than repeat visitors.

Table 6. Transient Boaters' Permanent Residence (1992).

Area	Zip Code ^a	Percent
Michigan		
Detroit	480-483	5.5
Tri-Cities	484-487	1.1
Lansing/Jackson	488,489,492	2.2
Kalamazoo	490,491	1.1
Grand Rapids	493-495	7.8
Northern Michigan	497	2.2
Western U.P.	498,499	2.2
Michigan Subtotal		22.0
Out of State		
Green Bay Area		29.0
Wausau Area		10.0
Milwaukee Area		7.8
Oshkosh Area		6.7
Other Wisconsin		2.2
Chicago Area		13.3
All Other States		9.0
Out of State Subtotal		78.0
Grand Total		100.0

^a Michigan Zip code areas are depicted in Figure 1.



Figure 1. Michigan 3 Digit Zip Codes

Table 7. Travel Patterns on this Trip

	1988	1992
First Stop (% Yes)		9.7
Next Stop (%)		
Another Port		65.6
Home		14.9
Don't Know		19.5
Number of Nights Spent Here	1.8	1.5
	Arrival at this Marina (%)	
Month		
June	3	0
July	54	61.2
August	34	28.0
September	9	10.8
Total	100	100.0
Time		
9-10 a.m.	5	0
11 a.m.-12 noon	5	22.0
1-2 p.m.	30	25.0
3-4 p.m.	31	29.4
5-6 p.m.	14	17.7
7-8 p.m.	7	3.0
9-10 p.m.	5	1.5
10 p.m.-9 a.m.	1	1.5
Total	100	100.0

Table 8. Travel Patterns of Escanaba Visitors in 1992 (Percentages)

County/ State	Storage Location	Trip Origin	Previous Stop	Next Stop	Primary Destination
Alger	0	0	0	4.9	0
Antrim	1.1	1.1	0	0	0
Baraga	0	0	0	3.3	0
Bay	1.1	1.1	0	0	0
Benzie	0	1.1	0	0	9.1
Charlevoix	1.1	2.2	0	4.9	4.5
Cheboygan	2.2	3.3	0	0	4.5
Delta	0	2.2	40.0	26.2	22.7
Emmet	1.1	1.1	0	0	0
Leelanau	0	0	0	1.6	0
Mackinac	1.1	1.1	0	0	0
Macomb	1.1	1.1	0	0	0
Manistee	0	0	6.0	0	0
Menominee	3.3	3.3	11.0	9.8	4.5
Muskegon	1.1	1.1	0	0	0
Oceana	1.1	1.1	0	0	0
Ottawa	5.4	5.5	0	0	0
Schoolcraft	1.1	1.1	9.0	1.6	0
St. Clair	1.1	1.1	0	0	0
Van Buren	1.1	1.1	0	0	0
Washtenaw	1.1	0	0	0	0
Wayne	1.1	1.1	0	0	0
Subtotal	25.0	29.7	66.0	52.5	45.5
Out of State					
Illinois	6.5	3.3	0	0	0
Minnesota	1.1	0	0	0	0
Wisconsin	64.1	65.9	34.0	47.5	54.5
Other States	2.2	0	0	0	0
Ontario	1.1	1.1	0	0	0
Subtotal	75.0	70.3	34.0	47.5	54.5
Total	100.0	100.0	100.0	100.0	100.0

Table 9. Previous Year Travel Patterns

	1988	1992
Overnight trip — previous year (% yes)	81.0	93.5
Number of Overnight Trips on the Great Lakes (%)		
0	19	6.8
1-4	51	52.3
5-9	12	13.6
10-15	12	15.9
16-20	0	4.5
20+	5	6.8
Total	100	100.0
Average Distance of Trips in 1991 (%)		
Miles		
< 50		33.4
50-99		50.0
100-199		8.3
200+		8.3
Number of Nights Away From Home Port in 1991 (%)		
Nights		
0		6.7
1-7		19.1
8-14		20.3
15-21		26.9
22-28		7.9
29+		19.1

Information Sources. Half of the transient boaters visiting Escanaba marina in 1988 and 1992 were first time visitors, who will usually be less familiar with the harbor, the marina, and what is available in the community. One-third of transient boaters were not aware of any other transient marinas within an hour (Table 10). Transient boaters use a variety of sources for information about the marinas and community. Word of mouth and previous experience are the two most frequently cited sources for this group of experienced boaters in 1992. The DNR Harbor's Guide and Government Charts were used by two-thirds of the boaters for marina information in 1992. Local publications and the Harbormaster were sources of information about the community used by half of transient boaters in 1992 compared to none using these sources in 1988 (Table 11). Boaters are generally more aware of sources of information about the marina than about the community. Boater access to information about the community could

be improved either by additions to the Harbor's Guide or by more extensive distribution of local tourist information at the marina.

Knowing how boaters obtain information about your facility/community is helpful in designing information or promotion programs. Pay attention to how your marina or community is presented in popular information sources. Make sure your listings in guidebooks are up-to-date and convey the information and image you want. Word of mouth and previous experience are very important. Your customers are your best promoters. Make sure you treat them well and they are passing along positive messages about your facility and staff to other boaters. The Harbormaster and staff should be well informed about facilities and services in the community and about nearby ports, so that they can adequately address the information needs of your customers. We also encourage cooperative efforts with local businesses and tourist organizations to better meet the transient boater's information needs. Communities wishing to attract more transient traffic should promote both their boating facilities and their community's attractions. Promotional information should be distributed in marinas within your primary market area and particularly in nearby ports.

Table 10. Awareness of Other Marinas and Previous Visits to Escanaba Marina

	1988	1992
Aware of another transient marina within one hour of here		
% Yes	68	67.0
Visited this marina before		
% Yes	50	53.8

Table 11. Information Sources

	1988	1992
Marina Information (%)		
Word of mouth	26	73.6
Past experience	5	79.1
DNR Harbors Guide	22	64.9
Government Charts	4	67.0
Other Charts	14	47.3
Local Publications	0	18.7
G.L. Cruising Club	13	23.4
Harbormaster	0	20.9
Other	15	7.7
Community Information (%)		
Word of mouth	60	78.0
Past experience	6	68.1
Local Publications	0	50.6
Harbormaster	0	49.5
DNR Harbors Guide	5	18.7
Other Charts	2	22.0
Government Charts	0	9.9
G.L. Cruising Club	3	15.6
Other	24	4.4

Note: Columns do not sum to 100% in 1992 because respondents were asked to list all of the information sources they used. In 1988 respondents were asked to provide primary information source for each marina and community.

Transient Boater Spending and Economic Impact. Transient boating parties spent an average of \$285 in Escanaba in 1992 compared to \$157 in 1988. Slightly more money was spent in the community as compared to the marina in 1992 which is the reverse as seen in 1988. Boater spending is somewhat less for boat-related compared to personal expenses. The majority of the boat-related expenses were made in the marina in 1988 and 1992. About three-fourths of the personal expenses were made in the community in 1988 compared to almost all in 1992. The largest boat-related items are dockage and fuel, while personal expenses are divided primarily between restaurants, groceries, and shopping (Tables 12 and 13). Spending in Escanaba by transient boaters in 1992 was 35 percent more than the spending measured in 1989 at six Michigan marina sites.

Table 12. Average Spending in Dollars per Party by Category (Escanaba 1988).

Spending Category	In Marina	In Community	Total	Percent
Dockage	19.30	0.70	20.00	12.7
Fuel	33.80	2.20	36.00	22.9
Pump Out	1.00	0.00	1.00	0.6
Repair	0.30	2.70	3.00	1.9
Supplies	0.60	1.40	2.00	1.3
Boat Subtotal	55.00	7.00	62.00	39.5
Restaurant	15.10	38.90	54.00	34.4
Grocery	5.30	9.70	15.00	9.5
Laundry	0.10	0.90	1.00	0.6
Shopping	3.90	14.10	18.00	11.5
Recreation	0.00	0.00	0.00	0.0
Other	2.20	4.80	7.00	4.5
Personal Subtotal	26.60	68.40	95.00	60.5
Grand Total	81.60	75.40	157.00	100.0

Note: Averages in this table reflect how many boaters spent money on an item and how much was spent by spenders in a given category.

Table 13. Average Spending in Dollars per Party by Category (Escanaba 1992).

Spending Category	In Marina	In Community	Total	Percent
Dockage	37.50	1.80	39.30	13.8
Fuel	78.30	1.70	80.00	28.1
Pump Out	1.80	0.00	1.80	0.6
Repair	0.70	1.50	2.20	0.8
Supplies	2.10	1.30	3.40	1.2
Boat Subtotal	120.40	6.30	126.70	44.5
Restaurant	0.00	59.50	59.50	20.9
Grocery	0.00	14.60	14.60	5.1
Laundry	0.00	0.80	0.80	0.3
Shopping	0.00	17.50	17.50	6.1
Recreation	0.00	16.60	16.60	5.8
Other	0.40	48.40	48.80	17.1
Personal Subtotal	0.40	157.40	157.80	55.5
Grand Total	120.80	163.70	284.50	100.0

Note: Averages in this table reflect how many boaters spent money on an item and how much was spent by spenders in a given category.

Differences in the total spending as well as the allocation of spending between the marina and the community and between personal expenses and boat related expenses seem to be related first to availability of products and services to spend money on, and secondarily to trip characteristics such as length of stay in the marina.

If we multiply the estimates of spending per boat in Table 14 by the number of boats served in each harbor, we get an estimate of the total spending generated in 1988 and 1992 by transient boaters in Escanaba. We estimate that Escanaba marina generated almost 109,000 dollars in spending by transient boaters in 1992, compared to over 56,000 dollars in 1988 (Table 15). More detailed itemization of spending can be obtained by multiplying the traffic counts from column two of Table 15 times the average spending by sector reported in Tables 12 and 13. Of particular note is the broad impact that transient boaters have on the community and their potential contribution to non-boating sectors of the local economy. Transient boaters spend somewhat more than the typical tourist and therefore represent a potentially lucrative market segment for coastal communities.

It is important to understand the economic impact that transient boaters have on your marina and your community. The marina itself captured only about 42 percent of the boater's spending in the harbor in 1992. Transient boaters are tourists who are travelling by boat. In addition to their spending in the marina, they have similar impacts as other tourists in the community. In order to spend money in the community, transient boaters need information and possibly local transportation. Communities with business districts near the marina will reap more income from transients. Individual businesses can profit by catering to the special needs of transient boaters. Careful attention to transient boater needs can increase local sales and revenue. Marina operators can enhance their role in the community by clarifying their contribution to the local economy and working cooperatively with local businesses and tourist organizations to better serve transient boaters.

Table 14. Average Spending per Party at Escanaba Marina by Year, Type and Location

Year	Spending in Dollars			Percent of Spending		
	In Marina	In Community	Total	In Marina	In Community	Total
Boat Related Spending						
1988	55.00	7.00	62.00	35.0	4.5	39.5
1992	120.40	6.30	126.70	42.3	2.2	44.5
Personal Spending						
1988	26.60	68.40	95.00	16.9	43.6	60.5
1992	0.40	157.40	157.80	0.1	55.4	55.5
All Spending						
1988	81.60	75.40	157.00	52.0	48.0	100.0
1992	120.80	163.70	284.50	42.4	57.6	100.0

Table 15. Total Transient Boater Spending in Escanaba (1988 and 1992)

Year	Boat Traffic	Marina \$	Community \$	Total \$
Boat-Related Spending				
1988	360	19,800	2,520	22,320
1992	383	46,113	2,413	48,526
Personal Spending				
1988	360	9,576	24,624	34,200
1992	383	153	60,284	60,437
All Spending				
1988	360	29,376	27,144	56,520
1992	383	46,266	62,697	108,963

Preferences and Evaluations. The most important reason for stopping in Escanaba marina was to find a place to spend the night. Next in importance was shelter. Fuel, local attractions, and groceries were of moderate importance. Special events and fishing were not important reasons for boaters to visit Escanaba (Table 16).

Table 16. Importance of Factors for Stopping in this Harbor

Attribute	1988	1992
Place to spend night	1.1	2.2
Shelter	1.5	2.7
Fuel	1.8	3.0
Local attractions	1.9	3.8
Groceries	2.0	3.6
Recreation facilities	-	4.2
Visit friends	2.7	4.4
Special event	2.9	4.7
Fishing	2.8	4.6

1992: 1=crucial, 2=very important, 3=important, 4=somewhat important, 5=not important

1988: 1=very important, 2=somewhat important, 3=not important

Boaters were asked to rate the importance of marina attributes in choosing a marina on an overnight trip. Transient boaters' primary concerns are with the physical facilities (protection from rough weather, dock structures, utilities, showers) and the social atmosphere in the marina (security, hospitality, noise). Recreation ranked last in importance out of 13 attributes in 1992 (Table 17).

Boaters were also asked to evaluate the marina on this same list of attributes. The evaluation of Escanaba marina's facilities is reported in Table 17. Boaters rated the performance of the marina on each attribute as excellent (1), good (2), fair (3), poor (4), or not available (5).

Marina performance increased from 1988 to 1992, indicating that in general Escanaba marina is concentrating on the attributes of most importance to boaters. Important discrepancies between Escanaba marina's performance and what is important to the boater helps pinpoint areas on which the marina should concentrate. For instance, the only performance concern by boaters in 1992 was Escanaba marina's inaccessibility to stores and restaurants.

Table 17. Importance-Performance Comparison

Attribute	1988		1992	
	Importance	Performance	Importance	Performance
Protection	1.1	1.4	1.8	1.6
Water Depth	1.2	1.8	2.1	1.3
Cleanliness	1.3	1.8	2.2	1.5
Security	1.5	2.1	2.2	2.2
Dock Structures	1.4	1.6	2.3	1.1
Utilities	1.6	2.0	2.4	1.3
Hospitality	1.5	1.4	2.5	1.3
Noise	1.5	1.9	2.5	1.7
Showers	1.5	2.1	2.5	1.9
Marine Radio	1.6	1.9	2.5	1.7
Easy to find	1.6	1.6	2.7	1.4
Near Stores/ Restaurants	1.8	2.3	2.7	2.8
Recreation	-	-	3.5	2.5

1992 Importance Rating: 1=crucial, 2=very important, 3=important, 4=somewhat important, 5=not important.
Performance Rating: 1=excellent, 2=good, 3=fair, 4=poor, 5=not available

1988 Importance Rating: 1=very important, 2=somewhat important, 3=not important.
Performance Rating: 1=excellent, 2=good, 3=fair, 4=poor.

Boaters were also given the opportunity to suggest improvements to Escanaba marina. These were classified into categories and are summarized in Table 18. The most common suggestions were for transportation and accessibility to stores and restaurants, and improvements in bathrooms and showers. Boaters requested a wide range of additional or improved services, the majority of which involved information about, access to, or availability of various stores and services in the community.

It should be noted that preferences and evaluations may vary between different members of the boating party. Results reflect the viewpoints of the skippers, who may assign greater importance to boat related facilities and services as compared with community facilities and personal services. The latter may be more important to other members of the crew. Unsolicited positive comments are given in Table 19. It is apparent that boaters are extremely pleased with Escanaba's marina and staff.

Understanding your customer's needs and preferences is essential to serving their needs. Almost all effective organizations periodically evaluate their performance. For customer-oriented organizations there is no good substitute for having the customer evaluate your performance. Marinas should compare their performance on each attribute to identify areas that may need improvement. Particular attention should be paid to attributes your customers rate as important, but for which they evaluate your performance below average. The open ended comments and suggestions tend to support the quantitative evaluations, while raising many topics for consideration by each marina.

Table 18. Suggestions for Improvement in Escanaba Marina

Suggestions	Number of Boaters
Need convenience store nearby	16
Car rental or other transportation available	14
New and larger shower facilities	8
Improve restrooms	7
Need restaurant and lounge	7
Need marine supplies store	4
Laundry facilities	3
Information about community stores and restaurants	3
Bike rental	2
Enforce no wake area	2
Keep fishermen, general public, non-boaters off docks	2
More public phones	2
More hooks for clothing in shower/toilet area	2
Shower mats on floor	1
Shorter shower curtains	1
Liquid soap dispensers in bathroom	1
Install grab-rail and anti-slip strips in bathroom	1
Pool	1
Add "dog leg" at entrance to prevent surge on ESE winds	1
Add pelican poles between slips	1
Need longer pier at launch ramp	1
Need grills for boaters	1
More wind break (ie. trees)	1
Better head pump equipment	1
Hire additional marina help	1
Provide self-addressed stamped envelope for key return	1
Cut down noise of teenagers/vehicles in park after 10 pm	1
Escanaba should be on CST if they want Wisconsin boaters	1
Stores and restaurants close too early on Sunday	1
Clue Wisconsin in on the money boaters bring into communities	1

Table 19. Unsolicited Positive Comments about Escanaba Marina

Comments	Number of Boaters
Hospitality and service tops	1
Marina was an excellent surprise	1
Stay in Escanaba was enjoyable	1
Escanaba is one of the best marinas	1
Wonderful marina	1

SUMMARY AND CONCLUSIONS

The 1992 Escanaba marina transient boater survey was designed to extend information about Michigan's transient boating market and to provide practical marketing and economic information. Data from Escanaba marina in 1988 and 1992 and six marinas in 1989 document some general characteristics of the transient boater market, while also illustrating many unique characteristics of the market in different harbors. While caution must be used in drawing general conclusions from the sample of marinas thus far studied, we can begin to identify some common patterns and some hypotheses that may explain differences among the marinas.

Boats taken on overnight trips on the Great Lakes outside of their home port tend to be larger craft piloted by quite experienced skippers. The most common party is two adults, usually between the ages of 40 and 60. For Escanaba visitors, these boats tend to be stored in the water at marinas in seasonal slips and are away from home port an average of 18 nights a year divided among 7 trips. About two-thirds of the trips are 50 miles or longer. More than three-fourths of the transient boaters in Escanaba marina studied in 1992 were from out-of-state, principally Michigan's neighboring states of Wisconsin and Illinois.

Transient boaters should be seen both as boaters and as tourists. As boaters, they are concerned with the safety and security of their craft, and the availability of necessary marine services such as dockage, navigational aids, fuel, and dockside utilities. After the basic needs for dockage and utilities, cleanliness (particularly bathrooms and showers), security and hospitality are the three most important marina features for transient boaters.

As tourists, transient boaters generally want or need food, local transportation, recreation, and information. Increasing access to local information and transportation can help to better serve the boaters' needs, and to generate additional sales for local businesses. These are particularly important if the marina is not located near commercial facilities. Communities such as Marquette that are now in the process of locating a transient marina near local businesses and attractions (or vice versa) can benefit the marina, the businesses, and transient boaters. Cooperation between marinas, local visitor bureaus and businesses in the community can likewise benefit all concerned.

Our past surveys have uncovered a great deal of variation across harbors. Most of the major differences seem to be related to the location of the harbor relative to concentrations of seasonal slips, and the marina location relative to the community. Harbors close to large markets tend to attract more repeat traffic and boaters on shorter trips. By contrast, northern marinas such as Escanaba, serve boaters on more extended trips and therefore draw larger craft with more experienced skippers from a broader range of trip origins.

Spending in a given harbor seems to depend most upon opportunities to spend money in the marina and the community and secondarily upon trip and party characteristics. Transient boater economic impacts on the community also depend upon the volume of traffic.

Differences across the marinas thus far surveyed begin to illustrate how the general location of a transient facility as well as the specific location of the marina relative to the community influence the kinds of boats and boaters that are attracted, and the impacts those boaters will have on the community.

The 1992 boating season on northern Lake Michigan was one of the worst on record because of below normal summer temperatures and a higher frequency of extremely windy days. The Harbormaster at the Escanaba marina reported that their 1992 transient boater traffic was down significantly. Thus the total economic impact of transient boaters is probably underestimated in this report.

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