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A Profile of 1986 Diver Activity in the Thunder Bay Bottomland Preserve

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PREFACE

This study would not have been possible without the continuing efforts of the Thunder Bay Underwater Park Committee, who coordinated survey distribution within the Thunder Bay Bottomland Preserve. Special thanks go to Thunder Bay Divers, Blue Water Charter Service, Arnold Boat Works, and Summit Sports for distributing surveys. The Alpena Chamber of Commerce is also thanked for its support. Finally, recognition also goes to the dedicated efforts of the staff at the Michigan State University Travel, Tourism, and Recreation Resources Center, who compiled and analyzed the data.

Introduction

In an attempt to better document diving activity in Michigan bottomland preserve areas, Michigan Sea Grant Extension conducted survey work in the four existing and one proposed (Whitefish Point) preserve areas during the summer of 1986. The purpose of this effort was to document preserve diver activity across the state and to provide data on this activity which local preserve interests could apply to their future marketing and development efforts.

One common survey instrument was used in all the areas, a copy of which can be found at the end of this report. Diver travelling groups were surveyed, with one member of the group filling out a survey. The surveys were distributed on-site to respondents through local dive charters, dive shops, marinas, and lodging establishments. Because charter operators were in the most effective position to survey visiting divers, the results are probably somewhat biased toward divers who used charter services. Local resident divers and visiting divers using private boats are probably underrepresented.

This report summarizes survey information collected in Alpena during the 1986 diving season. A total of 120 surveys were collected, representing 106 different travel groups. (14 surveys were collected from already surveyed travel groups.)

This report will also draw comparisons with survey data collected in Alpena during 1985. By doing so, short-term trends in diver activity related to the Thunder Bay Bottomland Preserve will also be presented. Throughout the report, analyses between first-time/repeat and in-state/out-of-state visitors will be made. Many of these analyses will offer insight into not only diver activity, but the effectiveness of local promotional efforts as well.

First-Time/Repeat Visitors

Of those responding to the survey, 60% indicated that this was their first diving trip to Alpena. This compares well with the 63.3% of first-time visitors diving in Alpena in 1985. The high number of first-time visitors during the past two diving seasons is also an indication that local promotional efforts have been successful in attracting new diving tourists to Alpena.

Length of Stay

1986 survey respondent's average length of stay in Alpena was 2.9 days. This is an increase over the 1985 figure of 2.2 days. Table 1 summarizes length of stay data for 1985 and 1986, and shows that there was a dramatic increase in travel parties staying more than three days. This is significant because extended-stay visitors create greater economic impacts for the area. Longer stays mean more dollars spent in the community.

Table 1 Length of Stay

Length of Stay	% Staying	
	1985	1986
Did not stay overnight	12.5%	6.5%
1 Day	16.3	14.6
2 Days	46.5	41.5
3 Days	16.3	17.1
More than 3 days	8.4	20.3

There are also some significant length of stay differences between different types of travel groups. Out-of-state visitors stay an average of 3.7 days, compared to 2.5 days for divers from Michigan. Repeat visitors stay an average of 3.3 days, compared to 2.6 days for first-time visitors. This seems to indicate that repeat visitors have become familiar with the area, liked their previous experiences here, and are willing to come back and stay longer.

Accommodations

Analysis of data on accommodations used shows that visiting divers tend to stay in local motels, with fewer camping, staying with family or friends, or staying on their boat. This same trend was seen from 1985 survey data. Accommodation use by visiting divers in 1986 is presented in Table 2.

Table 2 Accommodations Used

<u>Accommodations</u>	<u>Percent Using</u>
Cabins	1.6
Second Home in Area	2.4
Staying on Boat	10.3
Family/Friends	15.1
Camping	27.8
Motel	42.8

Further analysis of accommodation use shows some important differences, particularly between first-time and repeat visitors. This data is presented in Table 3. The majority of first-time visitors (52.1%) stay in motels. By contrast, repeat visitors tend to utilize some of the other accommodation alternatives in the area. This might be because as repeat visitors, they are somewhat more familiar with these alternatives.

Table 3 Accommodations Used By First-Time and Repeat Visitors

<u>Accommodations</u>	<u>First Time (%)</u>	<u>Repeat (%)</u>
Cabins	0	3.8
Second Home	1.4	3.8
Staying on Boat	8.2	13.2
Family/Friends	12.3	18.8
Camping	26.0	30.2
Motel	52.1	30.2

The "Family/Friends" category is also worth noting. The high percentage of visitors staying with family or friends indicates that local residents are currently fulfilling important service needs of visitors.

Persons Accompanying Divers

Survey respondents were asked how many people accompanied them to Alpena and how many non-divers were in their travelling group. The average party size in 1986 was 7.9 people, with 1.7 non-divers. This compares with 4.6 people and .7 non-divers in 1985. The increase is probably due to the increased promotion of the area, particularly with large groups and dive clubs. Group sizes in 1986 ranged from 1 to 38 people, and from 0 to 15 non-divers in the travelling group.

Diving Mode

Dive charters were used by 63.1% of the divers in 1986. Divers used private craft 30.8% of the time, and 6.1% of the divers participated in shore diving.

Once again, first-time and repeat divers exhibit some differences. Table 4 shows the diving mode used by first-time and repeat visitors in 1986. The greater percentage of repeat, private craft divers again suggests that once familiar with the area, visitors tend to seek other alternatives.

Table 4 Diving Mode Used By First-Time And Repeat Visitors

<u>Diving Mode</u>	<u>First-Time (%)</u>	<u>Repeat (%)</u>
Charter	67.1	56.9
Private Craft	25.3	39.2
Shore	7.6	3.9

Finally, by looking at the tabulation of diving mode and accommodations used by visitors in Table 5, we can begin to see the different visitor segments coming to the area. The implication here is that each of these groups may have different needs and satisfying them may require different services to be packaged by local businesses. For instance, private boaters coming to Alpena who wish to stay in a motel may require shuttle service between the motel and marina.

From Table 5, it can be seen that the largest segment (35.5%) of visitors is charter divers using motels. From prior discussion of accommodations and first-time preference for charters, it is probably also safe to say that most charter/motel visitors tend to be first-time visitors.

Table 5 Diving Mode and Accommodations Used By Visitors (Percent)

<u>Accommodations</u>	<u>Charter</u>	<u>Private Craft</u>	<u>Shore</u>
Motel	35.5	5.2	0
Camping	16.3	10.4	4.4
Boat	0.7	9.6	0
Family/Friends	9.6	4.4	0.7
Cabin	1.5	0	0
Second Home	0	1.5	0

Information Sources

Survey respondents were also asked how they first learned about diving in the area. Responses to this question, particularly by first-timers, can be a means of evaluating existing promotional efforts; and also useful in planning future ones. Table 6 presents information sources used by all respondents, along with first-time and repeat visitors.

Table 6 Information Sources Used By Diver Visitors

<u>Information Source</u>	<u>All Visitors (%)</u>	<u>First-time (%)</u>	<u>Repeat (%)</u>
Other Divers	45.7	45.8	45.5
Charter Operator	24.1	25.0	22.7
Diving Trade Show	19.0	22.2	13.6
Preserve Brochure	17.2	22.2	9.1
Dive Club	13.8	4.2	29.5
Advertisements	6.0	9.7	0
Other	3.4	4.2	2.3
Dive Shop	0.8	0	2.3

(Totals more than 100% due to multiple responses)

As seen in Table 6, 'word-of-mouth' information from other divers, and local charter operators are very important sources of information. Significant percentages of first-time visitors also responded that a trade show, advertisement, or brochure was an important source of information. This seems to indicate that recent promotional efforts are paying off. By contrast, many of the repeat visitors (29.5%) were informed through a dive club, indicating that this has been a major information source prior to the promotional efforts of the past two years.

There are also some significant differences between information sources used by in-state and out-of-state visitors. For in-state divers, charter operators, dive clubs, and the preserve brochure are important. Out-of-state visitors used trade shows as a significant source of information (37.5%). This indicates that the recent efforts at trade shows in Canada, Illinois, and Ohio are showing results.

Table 7 Information Sources Used By In-State And Out-Of-State Visitors

<u>Information Source</u>	<u>In-State (%)</u>	<u>Out-of-State (%)</u>
Other Divers	47.4	42.5
Charter Operator	27.6	17.5
Diving Trade Show	9.2	37.5
Preserve Brochure	14.5	22.5
Dive Club	19.7	2.5
Advertisements	3.9	10.0
Other	1.3	7.5
Dive Shop	1.3	0

(Totals more than 100% due to multiple responses)

Diver Residence

Table 8 shows the residence of divers visiting the Thunder Bay Preserve in 1985 and 1986. As seen, a much greater percentage of total visitors during 1986 was from out-of-state. Again, this seems to be evidence that recent out-of-state marketing efforts (particularly trade shows) have been successful. The major in-state difference of other Michigan counties from 1985 (22.5%) to 1986 (14.2%) is primarily a result of many more Alpena County resident responses in the 1985 data set.

Table 8 Diver Residence

	(Percent of Total Respondents)	
	1985	1986
MICHIGAN	89.4	66.7
Oakland County	18.8	17.5
Wayne	18.8	14.2
Saginaw	9.6	7.5
Ingham	8.5	2.5
Macomb	5.0	6.7
St. Clair	3.9	1.7
Lapeer	2.3	2.5
Other Counties	22.5	14.2
OUT-OF-STATE	10.6	33.3
Illinois	5.3	4.2
Ohio	1.8	11.7
Wisconsin	1.1	5.0
Ontario	0.9	5.0
Indiana	0	2.5
Kentucky	0.2	2.5
Other U.S.	1.1	2.5

Month of Visitation

Table 9 shows the diving activity by month within Thunder Bay for survey respondents during 1986. As shown, the diving season is six months long, with the majority of activity in mid-summer.

Table 9 1986 Diving Activity By Month

<u>Month</u>	<u>%</u>
May	1.7
June	18.3
July	24.2
August	36.7
September	13.3
October	5.8

Diver Attitudes Toward Area

Respondents to the 1986 survey were also given the opportunity to express what they like most or least about the Alpena area.

Table 10 summarizes the comments written by respondents on the surveys. Please note that these are general categories compiled by the authors which group specific responses made by individuals.

Table 10 Diver Attitudes Toward Area

<u>Like Most</u>	<u>Number of Responses</u>	<u>Like Least</u>	<u>Number of Responses</u>
Shipwrecks	19	Weather	14
Friendly People	16	Distance From Home	7
Service of Charters	13	Services (Restaurants, Lodging)	3
Variety of Wrecks, Dive Sites	13	Lack of Gas Early or Late	2
Water Clarity	11	Few Sheltered Dive Sites	2
Marked, Accessible Dive Sites	6	Lack of Camping on Lake	2
Clean, Relaxing Area	6	Lack of Entertainment	1
Natural Beauty	5		
Services (Lodging, Restaurants)	4		
Boating Facilities	3		
Distance From Home	2		

Conclusions

As evidenced by the results from the 1986 Diver Survey, recent marketing efforts to diver tourists of diving in Thunder Bay are having results. Many first-time visitors continue to come to Alpena, with significant new numbers from out-of-state areas. In many cases, visitors from these out-of-state areas (Canada, Illinois, Ohio) were related to the distribution of Alpena visitor information at diver trade shows. Continued participation in these trade shows should be supported by Alpena business interests, as they are a proven producer of new visitors to the area. Most importantly, it has been shown that out-of-state visitors stay one day longer than in-state visitors, thereby contributing increased expenditures in the local economy.

Since recreational diving tends to be a family/group/club activity, tour packaging should also continue to be developed as a promotional tool for the area. The network of dive shops and clubs in Michigan and throughout the Midwest could be important avenues for distributing information about tour packages and diving in Thunder Bay.

Dive festivals like the one planned for June, 1987 also could prove to be a significant piece of the promotional strategy. Such events can package a variety of activities of interest to divers and non-divers, and also be an effective means of "showcasing" the area.

Packaging of dive travel with other underwater preserve locations might be another way to promote diving. This might be particularly effective with out-of-state divers who wish to maximize their vacation time. If cooperative advertising and business practices could be developed, a tourist diver might be very receptive to a week-long package of diving in two or three Michigan preserve areas.

A key aspect of these or other promotional efforts will be the ability to provide a complete picture of services, recreation opportunities, and events in the area. Today's tourist wants timely, detailed and accurate information with which to make their travel decision. Such information may be especially important to non-divers interested in joining their diving family or friends for a trip to the Alpena area.

The most effective promotional tool is based on providing a quality experience to visitors. Continued development of services, recreation opportunities, and facilities to support and attract increased numbers of visitors will be vital. Additional management programs may also have to be implemented as increased people take to the waters of Thunder Bay.

Finally, "feeling welcome" is the best advertising for generating the always important repeat visit. Many of the survey respondents commented on the friendly service they were extended by local businesses while in the area. And, as evidenced by the importance of "word of mouth" information sources, satisfied visitors will also likely make positive travel recommendations to family and friends.

THUNDER BAY UNDERWATER PRESERVE
DIVER SURVEY

In order to effectively plan for the future development of the Thunder Bay Preserve, it is important that we learn more about the divers who are enjoying its diving attractions.

We would appreciate your assistance by taking a few minutes to complete the following form.

Thank you,

Thunder Bay Underwater Park Committee

Date: _____

Is this your first diving trip to the Alpena Area? Yes No

How many days do you plan to stay in the area? _____

Local accommodations:

Not staying overnight
Motel/Hotel
Rental Cabins/Cottages

Camping
Family/Friends
Own second home

How many persons accompanied you on this trip? _____

How many non-divers accompanied you on this trip? _____

I will dive from:

Charter boat
Private craft

Rental craft
Shore

How did you first learn about diving in this area?

Other diver(s)
Charter operator
Paper/magazine ads
Other (please specify) _____

Dive Club
Trade show
Preserve brochure

Where is your permanent residence located:

CITY STATE OR PROVINCE ZIP CODE

What do you like most about this area?

What do you like least about this area?

Please fill out if you are willing to provide additional information.

NAME _____

ADDRESS _____

CITY/STATE/ZIP _____