



The History, Arts, and Cultural Travel Industry in Michigan - 2013

By: Michigan Economic Development Corporation, Corporate Research
For: Michigan Council of Arts and Cultural Affairs

How important was the history, arts, and cultural travel industry in Michigan in 2013?

	# of Visitors (Person-stays) (Millions)	Direct Spending (\$ Millions)
Michigan leisure travel	87.27	\$13,804.3
History, arts, and cultural travel	9.90	\$2,066.8
Other types of leisure travel	77.37	\$11,737.6

Economic Impact of Leisure Trips in Michigan with History, Arts, and Cultural Activities (\$ Millions) - 2013

Beach/Waterfront	\$1,313.7	Wedding	\$221.3
Touring/Sightseeing	\$883.9	Reunion/Graduation	\$208.2
Gaming	\$835.5	Professional Sports Event	\$199.3
Parks: National/State, etc.	\$770.1	Camping	\$197.6
Nightlife	\$626.1	Zoo/Aquarium	\$196.9
Other Personal Celebrations and Gatherings	\$623.7	Art Show/Car Show/Boat Show/Home Show, etc.	\$167.0
Historic Sites	\$605.6	Medical/Health/Doctor Visit	\$160.4
Festival/Fairs	\$588.8	Snow/Winter Sports	\$145.9
Museum, Art Exhibits, etc.	\$588.1	Hunting	\$141.1
Movies	\$577.0	Funeral/Memorial	\$129.7
Boating/Sailing	\$512.0	Theme/Amusement/Water Park	\$127.9
Hiking	\$491.6	Other Activities	\$107.2
Winery/Distillery/Brewery Tours	\$419.9	Religious/Faith Based Conference	\$104.8
Fishing	\$409.3	Spa	\$86.3
Holiday Celebration	\$359.2	Business/Work	\$81.3
Biking	\$330.1	Service/Volunteerism/Charity	\$57.3
Wildlife Viewing	\$328.8	Tennis	\$49.9
Water Sports	\$311.8	Eco/Sustainable Travel	\$35.3
Concert, Theater, Dance	\$290.3	Real Estate (buy/sell)	\$34.5
Amateur Sports	\$240.9	Extreme Adventure Sports	\$24.5
Golfing	\$221.7	Michigan Total	\$13,804.3
		History, Arts, and Cultural Activities Total	\$2,649.8

Top 10 Origin States of History, Arts, and Cultural Travelers in Michigan - 2013

Michigan	78.3%
Ohio	4.5%
Indiana	3.5%
Illinois	3.4%
Wisconsin	1.1%
Tennessee	1.0%
Kentucky	0.9%
Mississippi	0.8%
New York	0.7%
Florida	0.6%
All Other States	5.1%

Top 10 Michigan Counties for History, Arts, and Cultural Travelers- 2013

Wayne	13.7%
Kent	10.7%
Saginaw	9.5%
Oakland	5.9%
Emmet	5.4%
Grand Traverse	5.0%
Cheboygan	4.4%
Macomb	3.7%
Jackson	2.9%
Allegan	2.7%
All Other Michigan Counties	36.0%

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An Explanation of Recent Methodological Changes to the
DIRECTIONS® Travel Intelligence SystemSM

D.K. Shifflet & Associates Ltd. (DKSA), founded in 1982, is the leading U.S. travel research firm and provides travel and tourism executives with the most complete and accurate travel data on U.S. residents and their travel worldwide. Their data are used daily by leading travel organizations and their strategic planning groups.

DKSA's *DIRECTIONS® Travel Intelligence SystemSM* contacts more than 50,000 U.S. households each travel month to obtain detailed travel data, resulting in the unique ability to identify trends and forecast U.S. travel behavior.

Since 1992, the Michigan Economic Development Corporation (MEDC) and its predecessor agencies have been purchasing annually updated, U.S. resident traveler data from DKSA, in the form of their *PERFORMANCE/MonitorSM* destination profile, as well as purchasing direct access to the company's travel data through their *DIRECTABS* software. DKSA also provides Michigan visitor volume and Michigan visitor direct spending estimates to the MEDC, annually.

The data set contained within *DIRECTABS* allows Michigan's research specialists to understand the travel characteristics of various types of visitors to the state, including business and leisure travelers. *DIRECTABS* also provides data on the demographics, origin geography, accommodations utilized, activities participated in, spending behaviors, and destination perceptions, of travelers to and within Michigan.

In the years prior to 2010, travel data was collected from U.S. households using mailed survey questionnaires. However, in 2010, DKSA's surveying method was modernized to an online survey administered to a panel of U.S. households. That first online survey was very similar to the previous mailed paper survey in that it did not utilize skip patterns or dynamic logic checks. It merely emulated the paper survey and continued to allow survey respondents to skip questions that they preferred not to answer.

In 2011, the list of activity variables included within the survey was enhanced and greatly expanded to allow for more comprehensive understanding of traveler behavior during trips. (See page 2.) Two new activity nets—libation and culinary and family/life events were also added to the existing list of activity nets comprising nature, attractions, outdoor sports, culture, touring/sightseeing, and general.

Then, in 2012, three major improvements were made to DKSA's data collection methods to enable more precise estimates of per-person-per-day spending than in prior years. First, the survey logic was revised to take full advantage of all the benefits of online data collection, including better skip patterns and dynamic logic checks, which their earlier paper survey and their original online survey did not allow. Second, a change was made to the way traveler spending data were captured by the online survey. For the first time, travelers were asked to report their spending at a stay or destination level, rather than at a trip level. This meant, for example, that if a traveler stayed in three different Michigan cities during a trip in Michigan, they were asked to report their spending in each city individually, rather than reporting an aggregate of their spending while in Michigan. This allows for much more precise spending estimates. And, third, the survey began capturing more specific types of spending for lodging (room rate, other room) and transportation (airfare, rental car, other transportation).

The improved survey logic has also eliminated many non-responses for spending, which were previously considered as zero dollars. Missing values should not be treated the same as reported zero values, so this was an important improvement. And where previously, spending was calculated on the entire base of those reporting as least \$1 spent in at least one category, sometimes resulting in lower than expected averages, it is now calculated based only on those respondents reporting spending in a given category. This is a more accurate way to calculate spending averages.

The result of these changes is two-fold. First, because individual averages are no longer calculated off a common base, the sum of sub-category averages will no longer equal the total average. Second, it will be difficult to compare 2012 or later per-person-per-day spending to prior years, particularly for lodging and transportation, the two categories most impacted by using the entire sample base to estimate averages.

What this all means for Michigan is that 1) spending figures for 2012 and subsequent years are higher, due to more rigorous and comprehensive capture of spending data, 2) the variables included in the original activity nets have changed significantly, and 3) weighting distributions across all activity nets results in a smaller percentage for each net than in years prior to 2012, due to their being two additional activity nets factored into the weighting equation.

It is important for all users of DKSA's traveler data to recognize that apples-to-apples data comparability of the total spending to their values in years prior to 2012 cannot be replicated using the *DIRECTABS* cross tabulations. The categorical totals, however, remain consistent within the dataset. As a result, DKSA believes that the newer data provides more in-depth and more accurate insights.

DIRECTABS Variables - Downloaded on 10/14/2014	Disused Variables	Current Variables	Activity Nets
Nature/Culture/Eco-Travel (2011 back)	Nature/Culture/Eco-Travel (2011 back)		
Eco/Sustainable Travel (2011+)		Eco/Sustainable Travel (2011+)	Nature
Watch Sports Event (2011 back)	Watch Sports Event (2011 back)		
Amateur Sports (2011+)		Amateur Sports (2011+)	Attractions
Professional Sports Event (2011+)		Professional Sports Event (2011+)	Attractions
Hike, Bike, etc. (2010 back)	Hike, Bike, etc. (2010 back)		
Hiking (2011+)		Hiking (2011+)	Outdoor Sports
Biking (2011+)		Biking (2011+)	Outdoor Sports
Hunt, Fish, etc. (2010 back)	Hunt, Fish, etc. (2010 back)		
Hunting (2011+)		Hunting (2011+)	Outdoor Sports
Fishing (2011+)		Fishing (2011+)	Outdoor Sports
Snow/Winter Sports		Snow/Winter Sports	Outdoor Sports
Extreme Adventure Sports		Extreme Adventure Sports	Outdoor Sports
Golfing		Golfing	Outdoor Sports
Beach/Waterfront		Beach/Waterfront	Nature
Boating/Sailing		Boating/Sailing	Outdoor Sports
Parks: National/State, etc.		Parks: National/State, etc.	Nature
Historic Sites		Historic Sites	Culture
Museum, Art Exhibits, etc.		Museum, Art Exhibits, etc.	Culture
Concert, Theater, Dance		Concert, Theater, Dance	Culture
Festival/Fairs		Festival/Fairs	Culture
Nightlife		Nightlife	Attractions
Gaming		Gaming	Attractions
Show: Boat, Car, Home (2012 back)	Show: Boat, Car, Home (2012 back)		
Art Show/Car Show/Boat Show/Home Show, etc. (2013+)		Art Show/Car Show/Boat Show/Home Show, etc. (2013+)	Attractions
Theme/Amusement/Water Park		Theme/Amusement/Water Park	Attractions
Touring/Sightseeing		Touring/Sightseeing	Touring/Sightseeing
Real Estate (Buy/Sell)		Real Estate (Buy/Sell)	General
Group Tour (2010 back)	Group Tour (2010 back)		
Entertainment (expenditure based) (2010 back)	Entertainment (expenditure based) (2010 back)		
Shopping (expenditure based) (2010 back)	Shopping (expenditure based) (2010 back)		
Dining (expenditure based) (2010 back)	Dining (expenditure based) (2010 back)		
Sports/Olympic Event (2010 back)	Sports/Olympic Event (2010 back)		
Zoo/Aquarium (2011+)		Zoo/Aquarium (2011+)	Attractions
Movies (2011+)		Movies (2011+)	Culture
Wildlife Viewing (2011+)		Wildlife Viewing (2011+)	Nature
Camping (2011+)		Camping (2011+)	Nature
Tennis (2011+)		Tennis (2011+)	Outdoor Sports
Water Sports (2011+)		Water Sports (2011+)	Outdoor Sports
Shopping (2011+)		Shopping (2011+)	General
Medical/Health/Doctor Visit (2011+)		Medical/Health/Doctor Visit (2011+)	General
Service/Volunteerism/Charity (2011+)		Service/Volunteerism/Charity (2011+)	General
Religious/Faith Based Conference (2011+)		Religious/Faith Based Conference (2011+)	General
Spa (2011+)		Spa (2011+)	General
Business/Work (2013+)		Business/Work (2013+)	General
Visit Friends/Relatives (2011+)		Visit Friends/Relatives (2011+)	Family/Life Events
Holiday Celebration (2011+)		Holiday Celebration (2011+)	Family/Life Events
Reunion/Graduation (2011+)		Reunion/Graduation (2011+)	Family/Life Events
Wedding (2011+)		Wedding (2011+)	Family/Life Events
Funeral/Memorial (2011+)		Funeral/Memorial (2011+)	Family/Life Events
Other Personal Celebrations and Gatherings (2013+)		Other Personal Celebrations and Gatherings (2013+)	Family/Life Events
Culinary/Dining Experience (2011+)		Culinary/Dining Experience (2011+)	Libation and Culinary
Winery/Distillery/Brewery Tours (2011+)		Winery/Distillery/Brewery Tours (2011+)	Libation and Culinary
Other Activities (Any)		Other Activities (Any)	General