

Implementing the 2012-2017 Michigan Tourism Strategic Plan: Fall 2015 Summit



Implementing the 2012-2017 Michigan Tourism Strategic Plan

Welcome!

Travel Commission Chair
Christian Øverland &
Travel Michigan Vice President
Dave Lorenz

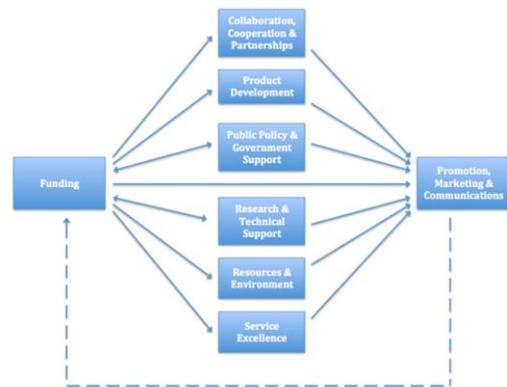


Implementing the 2012-2017 Michigan Tourism Strategic Plan

The 2012-2017 Michigan Tourism Strategic Plan – developed and implemented with continuing input from tourism industry stakeholders via a process facilitated by MSU and under the leadership of the Travel Commission.

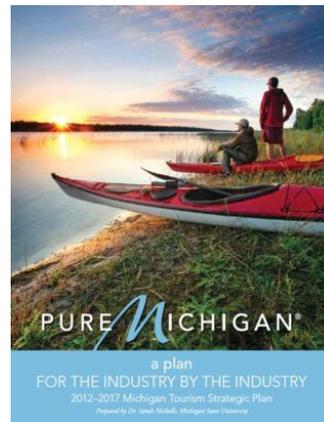


*"For the industry,
by the industry."*



Agenda/Materials

- * In your packet:
 - * Travel Commissioner committee roles
 - * Committee members
 - * Progress report
- * Committee Reports x 8 – Co-Chairs – 10-12 mins + discussion
- * All materials inc. PPT at <http://tourismplan.anr.msu.edu/>



MTSP Vision:

*Michigan is one of America's
favorite four seasons
travel experiences*

PURE MICHIGAN®

Collaboration, Cooperation and Partnerships

PURE MICHIGAN®

Collaboration, Cooperation and Partnerships

Foster a culture of public-private collaboration, cooperation, and partnerships – across the state and beyond – to continue to unify the tourism industry and help grow Michigan's economy.

Co-Chairs = Julie Sprenger and Brad Van Dommelen

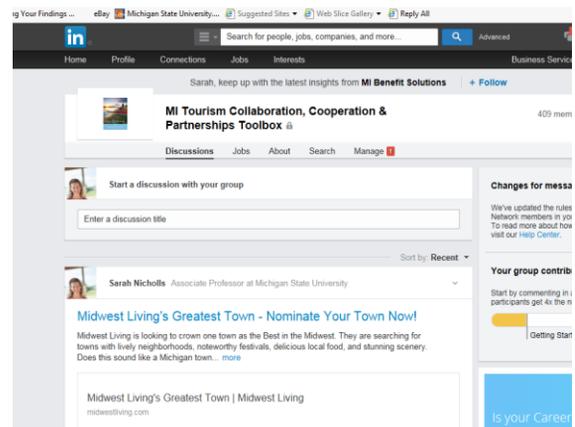
PURE MICHIGAN

CCP Objectives (Prioritized)

1. Objective #2 – Establish an online statewide toolbox or clearinghouse to support collaboration, cooperation and partnerships.
2. Objective #1 – Grow and strengthen partnership programs and communicate their success to the industry
3. Objective #4 – Increase the number and diversity of participants at the annual Governor's Conference on Tourism and in the associated industry awards program.
4. Objective #3 – (On hold) Support the establishment or revitalization of regional tourism development organizations

CCP Accomplishments

- LinkedIn "toolbox"



CCP Accomplishments

- LinkedIn “toolbox”
- TM Partnership program survey
- Surveyed other state tourism conference fees
- Met with MRA and SBAM CEOs



CCP Current Activities

- Niche market CCP development
- Revised TM Partnership survey



Co-Chairs = Jerome Toney and Steve Yencich

\$\$ Overall Funding Objective \$\$

Adequate funding—of the Pure Michigan campaign and of other strategic plan initiatives—was one of the most fundamental and critical issues identified during the planning process.

Goal

Secure adequate and stable funding for all strategic plan initiatives.

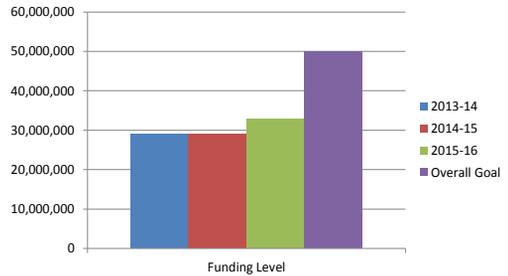
Objective 1

Increase funding for the Pure Michigan tourism campaign to \$50 million by 2017 and establish Michigan in the top five highest funded states for tourism marketing.

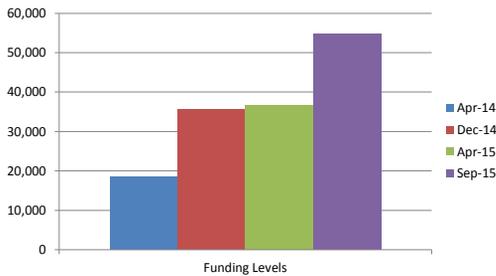
Objective 2

Identify sources of and raise sufficient funds to meet costs of other (non promotion/marketing) strategic plan initiatives.

Pure Michigan Funding



MI Tourism Plan Fund



Current/Ongoing Activities

MLTA continues to retain the services of Muchmore, Harrington, Smalley and Associates to lobby for Pure Michigan funding.

MLTA continues to invest association and industry financial and staff resources towards the goal of \$50M by 2017.

The Funding Committee continues to solicit funding for plan implementation.

Anticipated Funding Needs for 2015-16

**None
Spending
is not our
thing!**



Stumbling Blocks

Contributors are beginning to question:

“If you aren’t investing/spending what you have, why do you need more?”

“What has been the ROI of investments that have been made, or might be proposed in the future?”

Product Development

An adequate, accessible, and interconnected supply of tourism products and services, including accommodations, public and private transportation, and attractions and events, is an essential characteristic of a successful tourism destination.



Product Development

Enhance infrastructure to support the delivery of a world class Pure Michigan travel experience.

Co-Chairs = Mike Busley and Chris MacInnes



Prioritized Objectives

1. Support the establishment and showcasing of Michigan as a State with diverse, extensive and high quality network of motorized, non-motorized, and water-based routes and trails
2. Support the improvement and increased awareness of the quality, connectivity, and diversity of tourist transportation options into and throughout the State
3. Enhance the visitor's in-state travel experience
4. Increase access to capital for travel related businesses

Accomplishments to Date

2014: Developed a US State Tourism Competiveness Index to assess the relative strength of Michigan's tourism assets – based on the 22 factors incorporated, Michigan ranked 9th. Will be updated and results correlated with visitation/ spending in 2016.

DEVELOPMENT OF A TOURISM COMPETITIVENESS INDEX
 Hilary Norenson and Dr. Sarah Nicholls, Department of Community Sustainability

INTRODUCTION AND PURPOSE
 The purpose of this report is to provide a comprehensive overview of the factors that contribute to a state's tourism competitiveness. This report is based on a survey of 22 factors that are considered to be important in determining a state's tourism competitiveness. The factors are ranked based on their importance to the state's tourism industry and are used to calculate a state's overall tourism competitiveness score.

METHODS
 The data for this report was collected through a survey of 22 factors that are considered to be important in determining a state's tourism competitiveness. The factors are ranked based on their importance to the state's tourism industry and are used to calculate a state's overall tourism competitiveness score.

RESULTS
 Michigan's overall tourism competitiveness score is 9th in the United States. The factors that contribute most to Michigan's score are: Quality of life, Safety, and Infrastructure.

CONCLUSION
 Michigan's overall tourism competitiveness score is 9th in the United States. The factors that contribute most to Michigan's score are: Quality of life, Safety, and Infrastructure.

REFERENCES
 Nicholls, S. (2014). Michigan's Tourism Competitiveness Index. Michigan State University.

ACKNOWLEDGMENTS
 The authors would like to thank the following individuals for their assistance in the development of this report: Hilary Norenson, Dr. Sarah Nicholls, and the Michigan State University staff.

Accomplishments to Date

August 2014: Coordinated a two day workshop in Marquette with approx 60 individuals from MDOT, MDNR, NPS, Travel Marquette, Iron Ore Heritage Trail Authority, MSU, etc. Purpose was to tour the IOHT and learn best practices in the creation and operation of this trail system so that this information can be shared with other communities

January 2015: Dr. Nicholls/MSU published A Survey of IOHT Trail Users. This document outlines methods of survey to be used across the state. It also provides limited insight into who uses the trail, why, how often, etc

August 2015: Dr. Nicholls/MSU published the Trails as Tourism Attractions: Best Practices from Marquette. This document has been distributed across many entities State-wide and is intended to be a reference in helping communities further their development of trail networks

**TRAILS AS TOURISM ATTRACTIONS:
BEST PRACTICES FROM MARQUETTE**



Prepared by
Dr. Sarah Nicholls,
Jacquelyn Baker & Meghan Woods
on behalf of the

2012-2017 Michigan Tourism Strategic Plan
Product Development Implementation Committee
August 2015



A Survey of Iron Ore Heritage Trail Users

Prepared by
Meghan Woods and Dr. Sarah Nicholls

Michigan State University
January 2015

Ongoing Activities

Objective: Enhance visitors in-state travel experience
Development of either a how-to guide or an award highlighting accessibility and mobility accommodations. This is to increase awareness of Michigan as a leader in attracting tourists in this expanding market sector.

Objective: Increased awareness of quality, connectivity, and diversity of transportation options throughout the State
Develop a cohesive Pure Michigan branding campaign in the airport terminals across the State.

Objective: Showcasing Michigan as 'The Trails State'
Identify existing trail data bases and assist in the integration of this data into a more user friendly, comprehensive product. Link with strategic partner websites/social media channels.

Promotion, Marketing and
Communications

PURE MICHIGAN



Promotion, Marketing, and Communications

Strengthen and grow the Pure Michigan brand through effective mediums at the regional, national and international levels to attract first-time and repeat visitors.

Co-Chairs = Sally Laukitis and Barry Owens



Objectives – Equal Prioritization Current figures listed in progress report

Objective One: Increase regional and national awareness of the Pure Michigan campaign from 70% and 36%, respectively, in 2011 to 80% and 50% by 2017.

Objective Two: Increase visitor spending from \$17.7 billion in 2011 to \$21.5 billion in 2017.

Objective Three: Increase the return on investment on Pure Michigan from \$4.90 in 2011 to \$6 by 2017.

Objective Four: Improve Michigan's desirability as a place to visit (per the Portrait of American Traveler Report) from 28th in 2010 to 15th or better in 2017.

Objective Five: Increase the Pure Michigan campaign's presence in international markets.

Objective Six: Increase Canadian visitation to Michigan from 1.54 million in 2011 to 2.15 million by 2017.



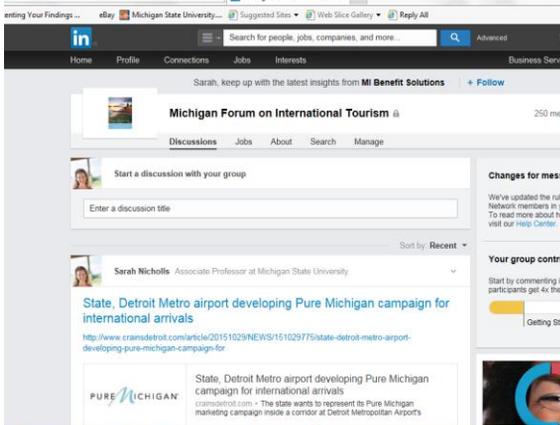
Focus = how to assist Travel Michigan in achieving these objectives via extending/strengthening of the Pure Michigan brand



Progress made in 2013-2015

- Michigan Forum on International Tourism launched Sept. 2013 – now has 250 members – please join!





Progress made in 2013-2015

- Study of MSU international students completed.
 - Implementation workshop in planning stages (CVBs, attractions, transportation, tour operators) (Feb 2016?).
- Michigan Bicycle Tourism Marketing Plan completed.
 - One community/advocacy group, Pedal Holland, already formed as a direct result of this activity.
 - Companion marketing plan template also written, to allow other niches to replicate the plan development process.



MICHIGAN BICYCLE TOURISM MARKETING PLAN



Prepared by
 Dr. Sarah Nicholls, MSU
 and Dave Sertino, TwoSix Digital
 on behalf of the
 2012-2017 Michigan Tourism Strategic Plan
 Promotions, Marketing and Communications
 Implementation Committee
 February 2015

Current Activities

- Preparation of Michigan Equestrian Tourism Marketing Plan underway
 - Final input session 9:30am-1:30pm this Thurs (Nov 12) in Lansing



Plans for 2016

- Facilitate implementation of recommendations re. international students
- Assist bicycle sector with implementation of Bicycle Tourism Marketing Plan
- Finalize Equestrian Tourism Marketing Plan
- Support redevelopment of michigan.org



Public Policy and Government Support





Public Policy and Government Support

Empower the industry to encourage policy-makers at all levels to support the travel industry.

Co-Chairs = Jon Nunn and George Moroz



Public Policy & Gov't Support Committee: Accomplishments to Date (since Jan 2013)

- PP&GS Committee met 4 times in 2013, 4 times in 2014, 3 times in 2015.
- Invited several registered multi-client lobbyists to join PP&GS Committee.
- Committee Co-Chair testified before MI House Tourism Committee asking them to invite a full presentation on the MTSP and inviting them to work with PP&GS Committee.
- Prof. Sarah Nicholls subsequently did provide a presentation on the MTSP before the House Committee.
- Invited and had MI House Tourism Committee Chairman Pettalia and Minority Vice Chair Rep. Kosowski meet with PP&GS Committee for discussion on MTSP issues, e.g., importance of/need for tourism industry research, role of tourism in economic development, and how the two Committees could interact for mutual benefit.
- Recommended to TM that local state legislators and municipal officials be invited to all MI Travel Commission meetings.

Public Policy & Gov't Support Committee: Accomplishments cont.

- Co-Chair testified at first organizational meeting of the new (98th Legislature) House Tourism & Outdoor Recreation Committee, introducing our PP&GS committee and its work, and offering its support to the House Committee.
- Co-Chair met individually with all the new legislative leadership to discuss the importance and value of Michigan's tourism industry.
- Secured the attendance of Rep. Bruce Rendon, the new Chairman of the House Tourism & Outdoor Recreation Committee, at a meeting of PP&GS committee where we shared our respective committees' objectives and our mutual commitments to work together.
- In the process of developing a MI tourism impact stats PowerPoint that MSU Extension personnel will share with local county commissions.
- Had Lance Binoniemi of the Michigan Infrastructure & Transportation Assoc. (MITA) present to the PP&GS Committee on their MI roads funding position and strategy.
- Worked with TICOM to develop for the Advocacy Toolkit industry sector infographics highlighting impact stats for various industry sectors.

Prioritized Objectives:

Objective One – TOP PRIORITY: Improve understanding of the value of tourism and support for the tourism industry among state legislators, county and local officials, businesses and residents.

- Develop legislative toolkit to educate industry members on how to advocate with public officials
- Establish relationships with tourism focused legislative committees
- Develop brief presentation highlighting key tourism stats/impacts and share with relevant groups

Objective Two: Improve existing and develop new organizational structures to enhance public sector interaction with and support of tourism policy and planning activities.

Public Policy & Gov't Support Committee: Accomplishments cont.

- Approached Tourism Industry Coalition of MI (TICOM) to take on the advocacy toolkit project; TICOM agreed to do so, pending TC funding support for that effort.
- Secured support for TICOM's request to the new MI Tourism Plan Fund for funding support for the Advocacy Toolkit project. Toolkit is live: <http://mitourismadvocacy.com/index.html>
- PP&GS Committee Members Bill Sheffer and George Moroz presented testimony before the MI House Appropriations Subcommittee for Transportation regarding the critical importance of a quality transportation infrastructure to MI's tourism industry.
- Encouraged industry members to attend tourism related hearings in the MI State Legislature.
- Met with and secured agreement from MEDC lobbyist to give a educational presentation to MI Travel Commission re advocacy, legislative schedule, etc. at future TC meeting.
- Worked with TICOM to take a lead role in advocacy efforts on several federal

Public Policy & Gov't Support Committee: Accomplishments cont.

- Secured permission from the MI NonProfit Association to include their "Advocacy Primer" in the TICOM tourism advocacy toolkit.
- PP&GS Committee hosted Co-Chairs of the MTSP Resource & Environment Committee to discuss integration and coordination of respective efforts, e.g., Great Lakes protection/stewardship issues such as banning of micro-beads from personal grooming products and opposition to open-cage aquaculture.

Public Policy & Gov't Support Committee: Recent/Current/Ongoing Activities

- Committee members developing a 15-20 minute "Why Tourism Matters" presentation on the role, value and impact of tourism activity on local geographies (e.g., cities, villages, towns, townships, counties). Intended audiences for the presentation include local elected officials, local chambers of commerce, local business groups, etc.
- Co-Chair and a small group of tourism stakeholders in the Bay City area met with U.S. Sen. Gary Peters to discuss and seek his support on a variety of tourism related issues/concerns.
- PP&GS Committee Co-Chairs, Co-Chairs and members of the RE Committee, Chair of TICOM Advocacy Committee, VP of Travel MI and Sarah Nicholls met with Jon Allan, Director, and Emily Finnell, Great Lakes Policy Specialist, Office of the Great Lakes, to discuss their draft water strategy for Michigan, "Sustaining MI Water Heritage: A Strategy for the Next Generation," and the roles that MI's tourism industry could play in the plan's dissemination and (partial) implementation.
- The PP&GS Committee will continue to advocate on all of the unresolved issues mentioned in previous slides.

Public Policy & Gov't Support Committee: Future Projects

- Support TICOM's efforts to develop Phase 2 of the Advocacy Toolkit.
- Develop and carry out an implementation strategy for the "Why Tourism Matters" local communities initiative, and the MSU Extension program titled "Understanding Tourism for Michigan Communities".
- Develop advocacy strategies for new tourism related issues that may arise.
- Develop advocacy strategies around tourism related issues for the 2016 MI House of Representatives elections.



Research & Technical Assistance

Co-Chairs: John Madigan & Melisa Thom-Brown



GOAL: Establish a central, easily accessible and inclusive information system to capture and share timely, relevant and reliable industry research.

Objective 1
Define and prioritize the research and technical needs of the other seven plan goals

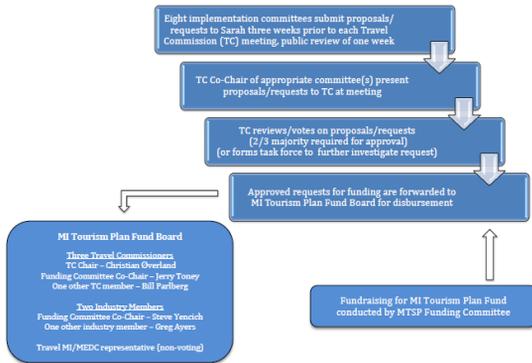
Objective 2
Develop a financially sustainable online information system to capture and share relevant industry research.



Objective 1: COMPLETED

With the Travel Commission's development of a funding/governance structure for the implementation of the MTSP in the spring of 2014, the RTA committee's role relative to *the research and technical needs of the other seven plan goals* has been shifted to the Travel Commission.

2012-2017 Michigan Tourism Strategic Plan Funding / Governance Structure



Objective 2 In Progress

1. Conceptualization and acquisition of funding to support a center similar to the former MSU Travel, Tourism, and Recreation Resource Center (TTRRC)
2. Work with Travel Michigan to ascertain what additional, finer scale data is available from their current data/research providers
3. Request Travel Michigan include a few critical survey questions to the request form for the State Travel Guide



Objective 2 (continued): In Progress

4. Install touch screen survey kiosks at a few key Michigan Welcome Centers (New Buffalo, Monroe, Sault Ste. Marie, Ironwood)
5. Develop protocol for a visitor survey, for use by interested CVB's; protocol would contain suggested questions as well as information about how to conduct a random survey.



Objective 2 : NEXT STEPS

1. Research possible grant sources for a support center such as the former TTRRC
2. Ascertain finer scale Tourism Economic data available thru D.K. Shifflet or possibly USTA
3. Continue discussion with Travel Michigan regarding an online critical travel pattern survey at www.michigan.org
4. Request funding from the Travel Commission to place survey kiosks at Welcome Centers
5. Work with Sarah + Don Holecek to develop protocol for a standardized visitor survey

Resources and Environment



Resources and the Environment

Be internationally recognized for our stewardship of – and rich opportunities to experience – our natural, cultural, and heritage resources.

Co-Chairs = Christian Øverland and Maia Turek



Prioritized Objectives

- Priority 1 - Objective Two: Identify key issues facing and threats to the integrity of Michigan's tourism resources and raise awareness of and support for these issues.
- Priority 2 - Objective Three: Raise the profile of Michigan's tourism industry as a national leader in resource quality and stewardship.
- Priority 3 - Objective One: Support and expand efforts to inventory resources critical to Michigan tourism and communicate results to relevant entities.

Accomplishments

- Objective Two: Identify key issues facing and threats to the integrity of Michigan's tourism resources and raise awareness of and support for these issues.
- Issues and Threats Survey (n = 556)

Issue	n	%
Spread of invasive species (aquatic + terrestrial)	330	59.4
Lack of/limited funding for resource protection/maintenance	327	58.8
Reduction in historic preservation tax credits	265	47.7
Declining water quality of our lakes, rivers and streams	244	43.9
Diversion of water from the Great Lakes	219	39.4
Declining water levels of our lakes, rivers and streams	217	39.0
Closure of Department of History, Arts and Libraries (HAL)	180	32.4
Fracking	137	24.6
Under-appreciation of Native American history and culture	114	20.5
Need for better/faster adoption of technology at tourism sites	112	20.1
Climate change	96	17.3
Spread of infectious diseases (e.g., Lyme disease)	48	8.6
Increasing number of wind farms	45	8.1

Accomplishments

- Objective Two: Identify key issues facing and threats to the integrity of Michigan's tourism resources and raise awareness of and support for these issues.
- Advocating against micro-bead manufacturing and for banning products made with micro-beads from Michigan –
 - Michigan Bill SB -0158
 - Federal Bills Microbead-Free Waters Act of 2015 (H.R. 1321; S. 1424)

Accomplishments

- Working with Jon W. Allan, Michigan Office of the Great Lakes and MTSP PPGS comm.
- Add additional tourism-related language and support into the Governor's Michigan State of the Great Lakes Report (see 2014 version here: http://www.michigan.gov/documents/06c4/State_of_the_Great_Lakes_2013_opt_44798_5_1.pdf)
- Hold a tourism-water forum – in-person or webinar
- Integrate Great Lakes Water Strategy into 2016 Governor's Conference on Tourism
- Convene other Great Lake States Travel Commissions, equivalents of TICOM, etc. to discuss tourism priorities for the future of the Great Lakes

Accomplishments

- Objective Three: Raise the profile of Michigan's tourism industry as a national leader in resource quality and stewardship.
- A Michigan tourism resource stewardship award, *The Pure Award*, has been conceptualized, for inaugural presentation at the 2016 Governor's Conference.
 - Criteria – innovativeness, significance, statewide impact and/or ability to be replicated throughout the state, inspirational, commitment to continuous improvement.
 - A zero-waste best practices toolkit for event organizers is under development.

Service Excellence

PURE MICHIGAN

Service Excellence

Foster a culture of service excellence that allows us to deliver on the Pure Michigan promise.

Co-Chairs = Larry Schuler and Jennifer Zieger

PURE MICHIGAN

Prioritization of Objectives

- * Objective One: Define “Service Excellence” and “The Pure Michigan Promise” and share these definitions with the industry.
- * Objective Two: Improve our D.K. Shifflet leisure visitor satisfaction scores and maintain a ranking in the top five states.
- * Objective Three: Establish and increase satisfaction and intention to return/recommend levels among national and international visitors.

PURE MICHIGAN

2013 Progress

* Define “Service Excellence”

We are passionate ambassadors of Pure Michigan, committed to creating memorable experiences and igniting our guests with an undeniable desire to return to our state.

- * A Ambassadors
- * C Creating
- * M Memorable
- * E Experiences

PURE MICHIGAN

2013 Progress ... cont.

* Define “The Pure Michigan Promise”

We promise to take pride in exceeding your expectations with a heartfelt and unforgettable experience, leaving you eagerly anticipating your return to Pure Michigan.

PURE MICHIGAN

2014 Progress

* Shared definitions at 2014 Governor’s Conference

- * Discussed development and implementation of a statewide “Pure Michigan Promise” training program
 - * Investigated possibility of aligning with CTA program

PURE MICHIGAN

2015 Progress

- * Decided to pursue a statewide Pure Michigan awareness/training program
- * Spent most of 2015 doing research .. Evaluating if we should create something new or collaborate with an existing program
- * Many challenges ... political, financial, ownership, management, and implementation among brands and variety of business size



2015 SE PM Awareness Campaign

After much deliberation ... we have decided

- * A Power Point presentation that will be housed on the Travel Michigan and MTSP websites
- * Easily integrated into any training program and does not overlap with Brand training
- * Intention – to increase state awareness among front line staff – increasing pride and desire to travel in the state
- * Much appreciation to Dr. Sarah Nicholls for compiling the information and developing the PPT!!
- * You are the first to see



Delivering on The Pure Michigan Promise



Implementing the 2012-2017 Michigan Tourism Strategic Plan

Tourism at the Global Level

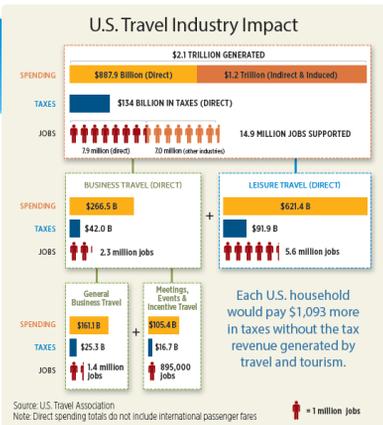


* Source: UNWTO Tourism Highlights, 2014 Edition

Tourism in the USA

- Accounts for:
- ❖ 2.7% of GDP
 - ❖ 1/9 jobs (#6)

The US's largest export



Tourism in Michigan

- * 113.4 million visitors in 2014 (includes in-state)
- * Approx. 58% day visitors, 42% overnight
- * Direct spending in 2014 = \$22.8 billion

Tourism's Contribution to Jobs

- * Tourism directly supports > 214,000 jobs in Michigan
- * Including indirect employment, tourism supports > 326,000 jobs (> 6% of all jobs in the state)

Tourism's Contribution to Taxes

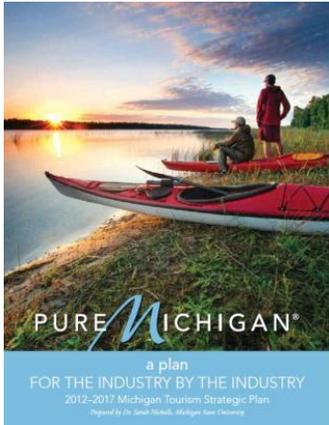
- * Tourism generated nearly \$2.4 billion in state/local and \$2.5 billion in federal tax revenue in 2014
- * If the tourism industry did not exist in Michigan, the additional cost in taxes to each household would be in the order of \$640 per year
- * Total impact of tourism = 3.9% of Michigan's economic activity



MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

PURE MICHIGAN

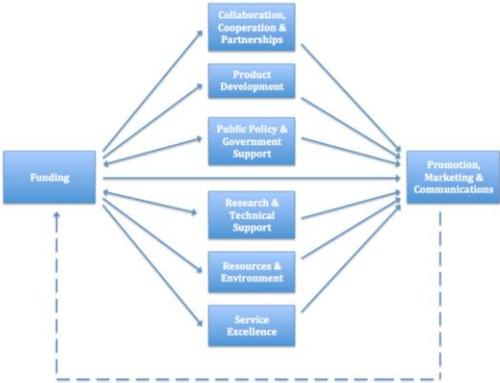
State's return on investment = \$6.87 in 2014,
\$4.81 for 2006-2014



The Vision:

Michigan is one of America's favorite four seasons travel experiences

PURE MICHIGAN



Service Excellence



Foster a culture of service excellence that allows us to deliver on the Pure Michigan promise.



What Do We Mean By Service Excellence?

Ambassadors Creating Memorable Experiences

We are passionate ambassadors of Pure Michigan, committed to creating memorable experiences and igniting our guests with an undeniable desire to return to our state.



What is The Pure Michigan Promise?

We promise to take pride in exceeding your expectations with a heartfelt and unforgettable experience, leaving you eagerly anticipating your return to Pure Michigan.

