Belle Isle Summary Presentation

January 21, 2016

DEPARTMENT OF NATURAL RESOURCES
DNR
MICHIGAN

BELLE ISLE CONSERVANCY

morpace Market Research & Consulting

Background and Objectives

Background

PURPOSE

To gain an understanding, among different cohorts, of their perceptions of Belle Isle, its importance and value. To focus on the level of awareness surrounding the park's features and potential improvements.

QUANTITATIVE METHODOLOGY

A multiple-pronged methodology that included participants from Wayne, Oakland and Macomb counties.

A goal of 700 completed interviews and two focus groups. A total of 200 interviews with stakeholders associated with Belle Isle Conservancy, 400 surveys from the general population of the three counties and 100 in-person intercept interviews conducted on the island itself.

- 10 minute survey (the actual time was closer to 20 minutes)
- Because of the extended length of the survey instrument, several long questions were rotated and not asked of all the respondents
- 75 minute focus groups

RESPONDENT COMPOSITION

- The final composition is shown in the table below:

Sample	
	Total (N = 717)*
Detroit	264
Wayne (not Detroit)	159
Oakland	166
Macomb	115

* a total of 13 intercept participants were not from one of the three listed counties.

- Respondents had to be at least familiar with the park to participant (not all of the people had been to the park in the last year).
- Project fieldwork took place in August, September and November 2015.

For questions with 717 responses to be statistically different at a 90% confidence level there needs to be a difference between two percentage responses of about 4.3%. Morpace has marked statistical variations throughout the presentation.

Objectives

Only for respondents who have been to the park in the past year

Reasons for visiting Belle Isle

- Activities/things that they do
- How often they visit
- What sights and activities they visited/participated in over the past year
- Traveling to Belle Isle
- Food on the island

Satisfaction and importance with park features

- Satisfaction level from cleanliness to the bicycle trails and many other items
- Importance for each of the same features as were rated for satisfaction
- How welcome they feel at Belle Isle
- Their overall experience on the island

All respondents

Perception of Belle Isle

- Description of the island
- Review of various activities
- Island upkeep

Belle Isle improvements

- DNR presence
- Additional/varying activities
- Means of obtaining island information

Only for respondents who are aware of the park but have not been to it in the past year

Level of awareness and interest in Belle Isle

- When was the last time they visited
- Why they hadn't visited for at least a year
- Appropriateness, of the park, for various activities
- Level of interest in various park activities
- Awareness of various sites and features
- Likelihood of future visits

Satisfaction and importance with park features

- Satisfaction level from cleanliness to the bicycle trails and many other items
- Importance for each of the same features as were rated for satisfaction

Executive Summary

Executive Summary Conclusions

- If a goal of the Conservancy and DNR is to increase visits to the park by people who have been there before, but not in the past year, focusing some attention on specific things to visit (museums, monuments, gardens, etc.) would probably be worth-while. Some of the findings tend to indicate that more current visitors come to the island for what might be termed “traditional park-like features” – open spaces, fresh air, natural beauty and scenery, etc. while individuals who have not been there in a while are more focused on specific things/places to visit. It is strongly possible that once people who have not been to the park recently or not been there at all, will then come back for its many “traditional park-like features.”

- One possible way to increase park usage among Detroit resident could be to expand the level of awareness and frequency of various events (such as concerts, boating, etc.) as Detroiters, who have not been to the park in the past year, were enthusiastic about these concepts.

Executive Summary Conclusions

- Over the course of several questions the respondents strongly voiced their opinion that the idea of purchasing food on Belle Isle was not very important. Food on the island was an important topic during the focus groups and many varying concepts were put forward. Simple, limited, food items and beverages would probably suffice for the significant majority of visitors.

- Visiting Belle Isle is a social event (a very high percentage of respondents came to the park with other people), and when they visit, individuals spend a lot of time – usually over three hours – on the island. These findings underscore the park's potential for an increased level of visitors. Belle Isle is already recognized as a place to go with a group of people and this friends and family atmosphere and reputation can be built upon to broaden its circle of visitors. These results also highlight the need to potentially expand and improve park facilities that cater to groups of people - from picnic shelters to restrooms.

Executive Summary Conclusions…Continued

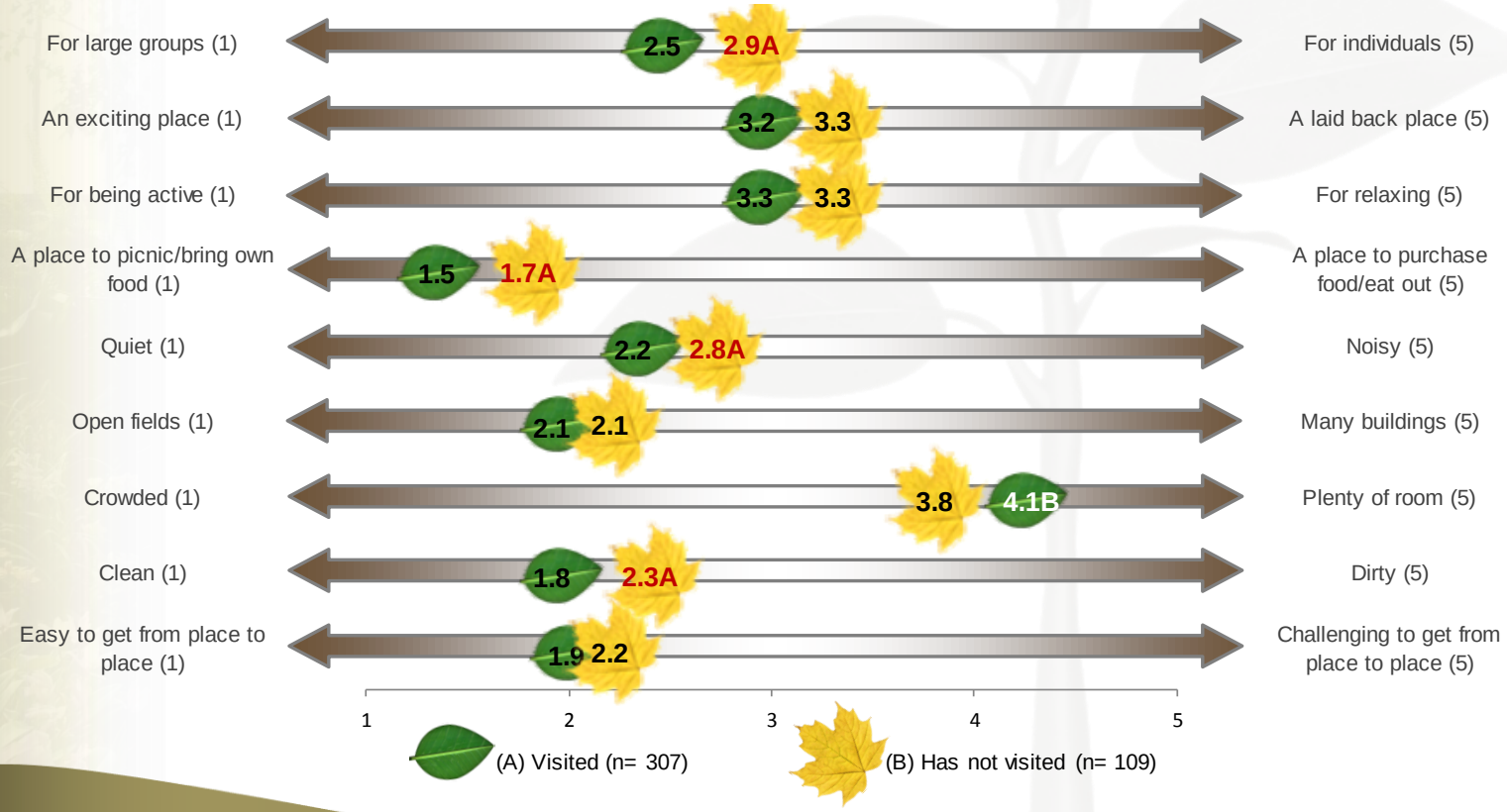
- The unmet needs charts, which is an analysis based on people's level of satisfaction about individual items and the importance of these same items, provided some clear-cut park improvement ideas. Many of participants' unmet needs rested in what could be generally termed "Sanitation / Maintenance". The restrooms and cleanliness were unmet needs of multiple groups of respondents. These responses were largely consistent among people who have been to the park recently and those who have not been (which provides us insights relating to the park's reputation). While obviously costing money (and therefore not being easy to undertake), improvements in the "Sanitation / Maintenance" area would very likely help it to expand its base of visitors and advance the perception and reputation of the island.

- With both questions featuring Top 2 Box results of over 80%, once they come to the park, people feel welcome and are very satisfied with their experience. These results strongly indicate that once "new" visitors come to Belle Isle their positive experience will lead them to come to the park again and again.

Description of Belle Isle, Uses and Management

Describing Belle Isle: Visited vs Has Not Visited

- Overwhelmingly, respondents thought of Belle Isle as a place to bring food/picnic rather than a location to purchase food.
- While not considered crowded, the park was thought of as having more room by individuals who have been there in the last year.

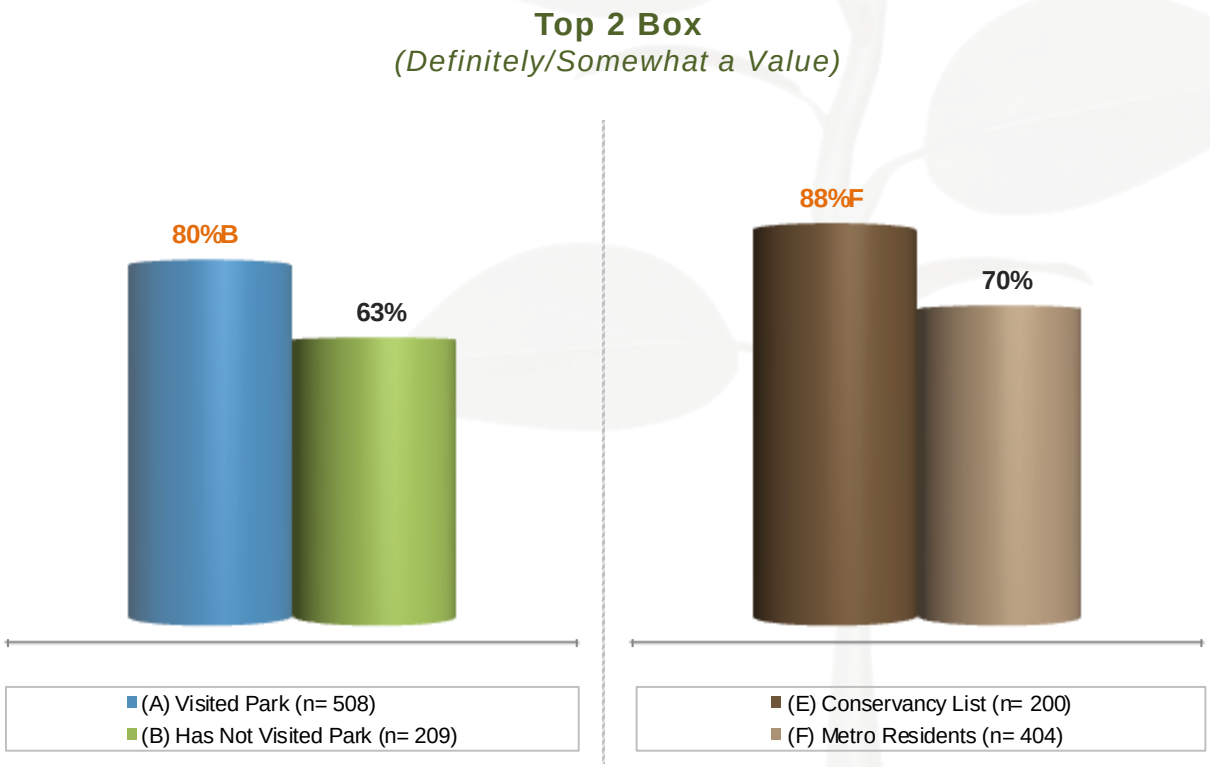


Q1A. On a scale of one to five where one means the first term describes Belle Isle more, three is neutral and five means the second term describes Belle Isle more please indicate which rating is the most accurate:

Capital letter indicates a statistically significant difference at a 90% Confidence Level.

State Park Passport

- Overall, the participants considered the State Park Passport to be a good value.



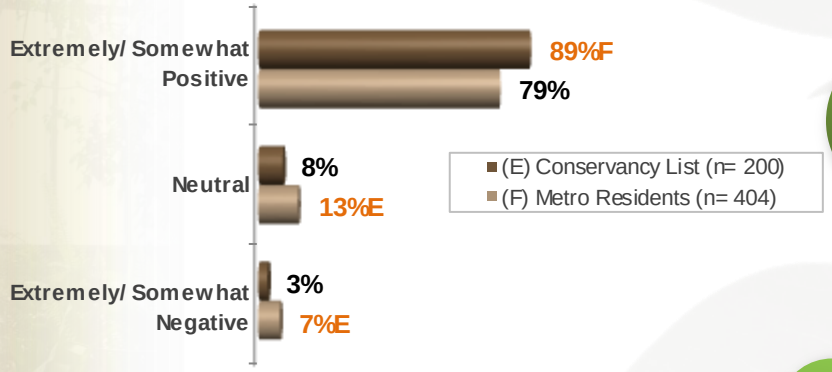
Q3. An $11 state park passport is needed to enter all 102 state parks. Belle Isle, being part of this system, requires this pass for entry. On a scale of 1 to 5 where 1 is definitely not a value and 5 is definitely a value, please indicate how much of a value this state park passport is to you.

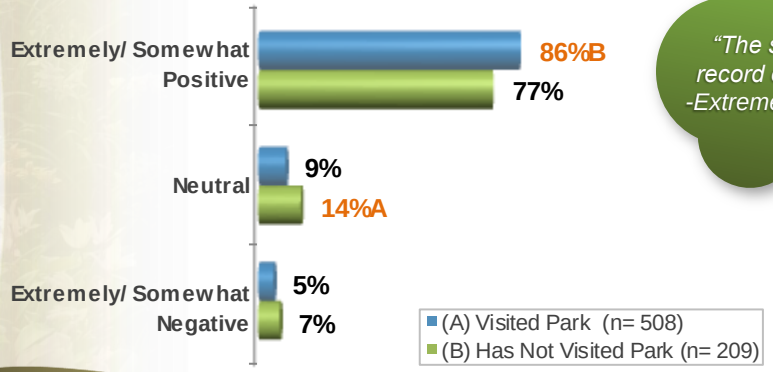
Capital letter indicates a statistically significant difference at a 90% Confidence Level.

State Park Management

- The fact that Belle Isle is now managed by the Michigan DNR was clearly seen as a positive development.

State Park Management: Positive/Negative





"The fee may limit the accessibility of people who can not afford the pass."
-Extremely/Somewhat Negative

"The state has pick up the tab and made it more friendly, cleaner and provides more security"
-Extremely/Somewhat Positive

"It's nice to have somewhere to go in the city. There is a lot of police presence there now."
-Extremely/Somewhat Positive

"The state has good track record of maintaining parks."
-Extremely/Somewhat Positive

Q31. As you may or may not know Belle Isle is now managed as a state park. On a scale of 1 to 5 where 1 is extremely negative and 5 is extremely positive How positive or negative do you think this development is?
Q32. In a few words, please tell me why you feel this way?

Capital letter indicates a statistically significant difference at a 90% Confidence Level.

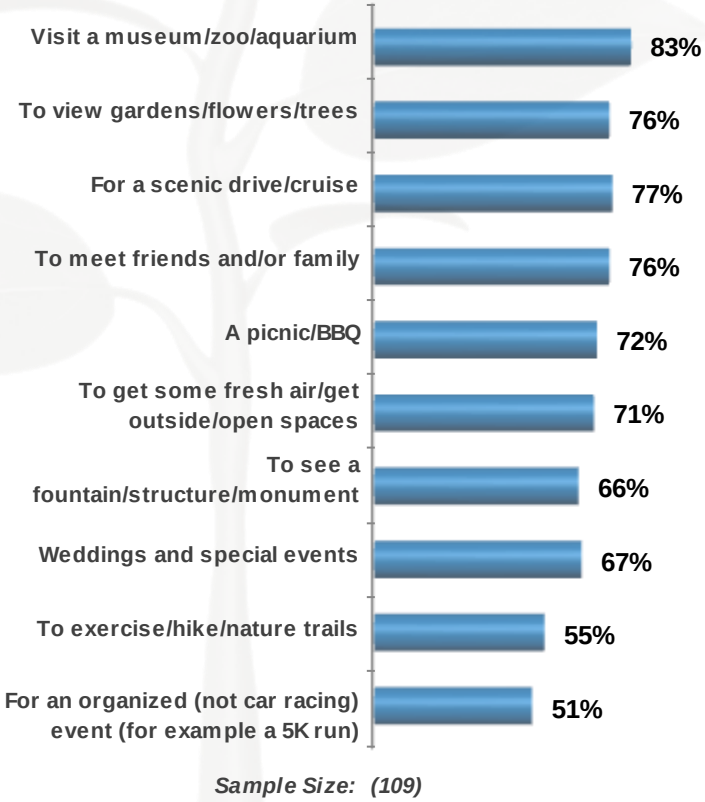
Visiting the Park

Reasons For Visiting Belle Isle

- Fresh air/open spaces, scenic drive/cruise, to meet a friend/family and a picnic/BBQ were favorite reasons to come to Belle Isle among people who had been there in the past year, but visiting a museum and gardens were very high on the list among non-recent visitors as reasons they would visit.

Reasons for Visiting
Visited in Past Year

Reasons to Visit
Not Visited in Past Year

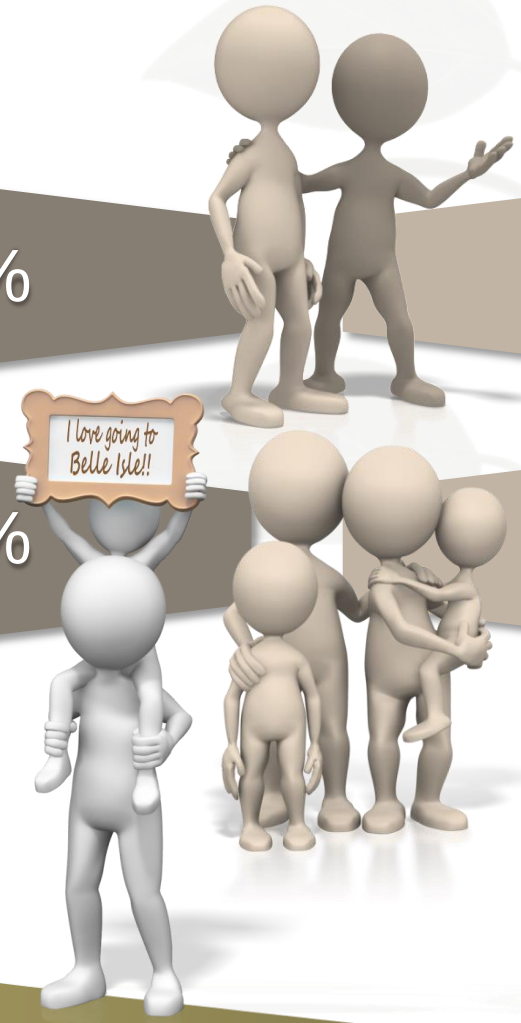


Q6. You have indicated that you visited Belle Isle at least once over the past year. What were the reasons that you have visited the park?
Q17A. If you were to visit Belle Isle, which of the following activities/reasons would interest you?

Visiting the Park

- Visiting Belle Isle is a social thing with an overwhelming percentage of the respondents indicating that they go or will go with at least one other person.

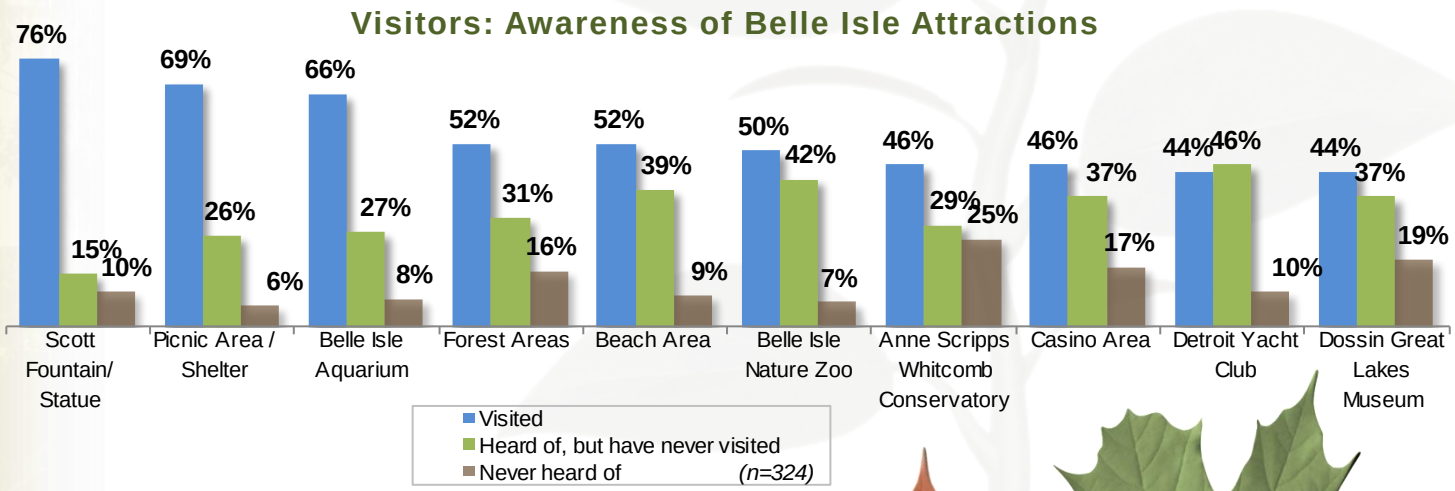
Visited Park		Has Not Visited Park
Usually visit with at least one other person (45% say typically 2-3 others) *N=508*	87%	99% Would visit with at least one other person *n=147*
Usually bring children *n=444*	46%	53% Would be extremely or somewhat likely to bring children under 18 *N=137*

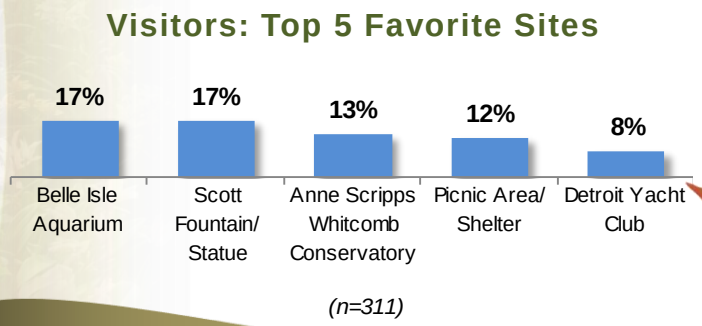


Q8. When you visit Belle Isle do you usually come alone or with at least one other person?
Q9. Typically, how many additional people are with you when you visit Belle Isle?
Q10. Are any of these additional people typically children under the age of 18?
Q21. If you were to visit Belle Isle, do you think you would come alone or with at least one other person?
Q22. On a scale of 1-5 where 1 is extremely unlikely and 5 extremely likely, would it be likely that this additional person/people will include at least 1child under the age of 18?

Belle Isle Attractions: Visitors

- Scott Fountain/statue and the Belle Isle Aquarium were easily the most visited sites and they were the favorites as well. While they were visited less often than other attractions, respondents still had at least an awareness of the casino area and the Dossin Great Lakes Museum.





"I visit it [Belle Isle Aquarium] I love the structure, historical and it's being redone."

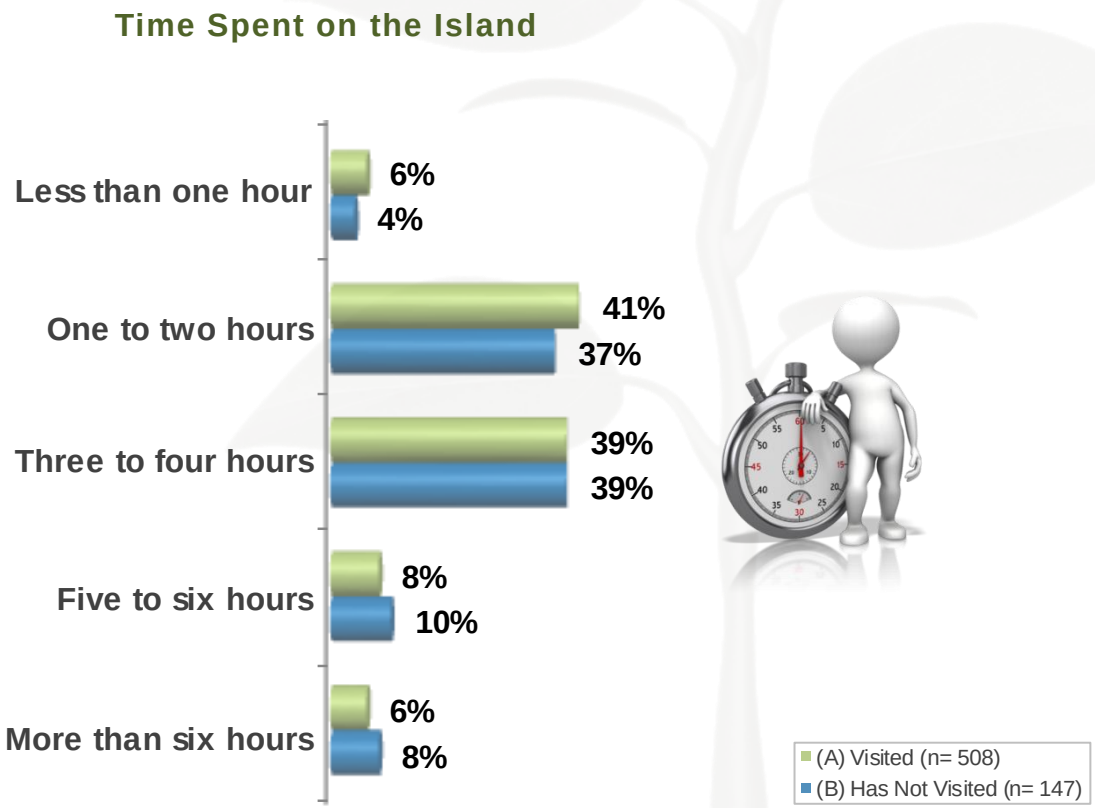
"Because it's [Anne Scripps Whitcomb Conservatory] beautiful and nice to visit in the winter."

"I like it [Scott Fountain/Statue] when it lights up it gives you a relaxed feeling"

Q11A. Over the past year, have you visited and/or are you aware of/have you ever heard of any of the following specific sites/locations on Belle Isle?
Q12. Of all the sites/locations that you visited, which one was your favorite?
Q12A. Why did you select (INSERT RESPONSE FROM Q12) as your favorite?

Time Spent on the Island

- Whether a visitor within the past year or not, the vast majority of individuals spent at least one hour in the park with more than 50%, of each group, being on the island for three or more hours.



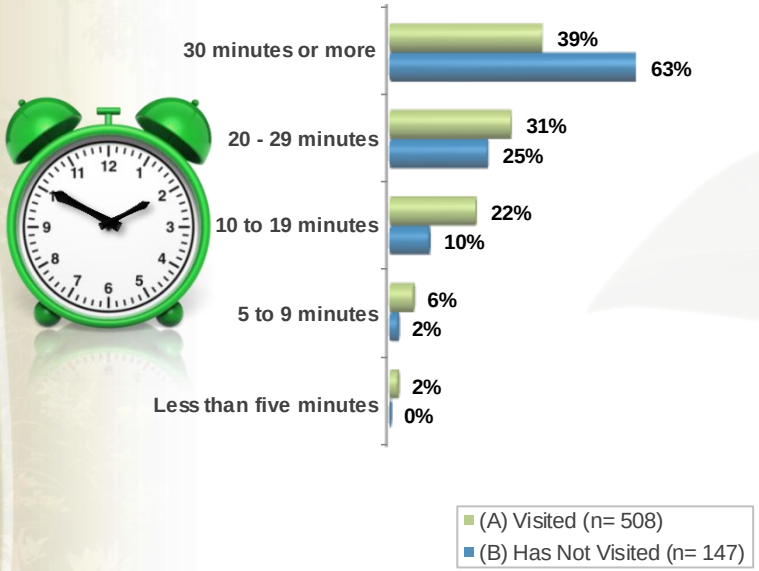
Q14. During an average visit, how long do you spend on Belle Isle?
Q24. If you were to visit Belle Isle, how long do you think you would spend there?

Capital letter indicates a statistically significant difference at a 90% Confidence Level.

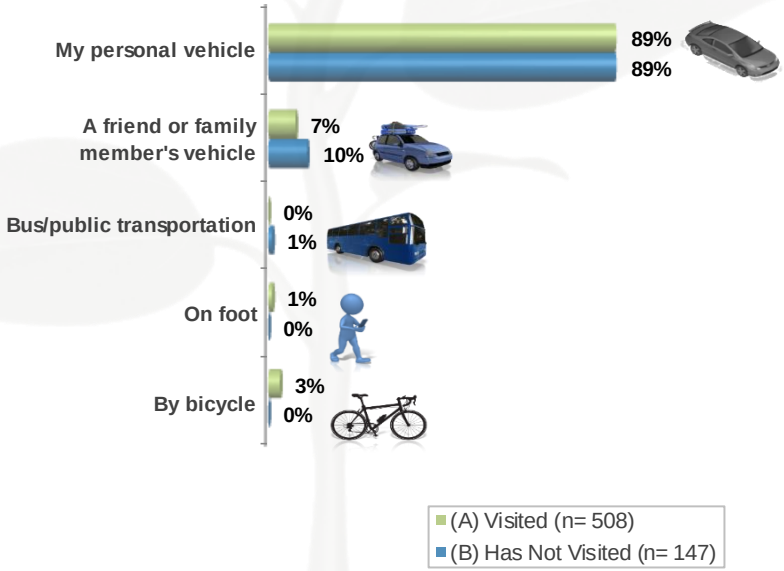
Transportation

- People who have not visited Belle Isle in the past year indicated that it would take them much longer to get there than participants who had visited it.

Average Time



Transportation to the Park

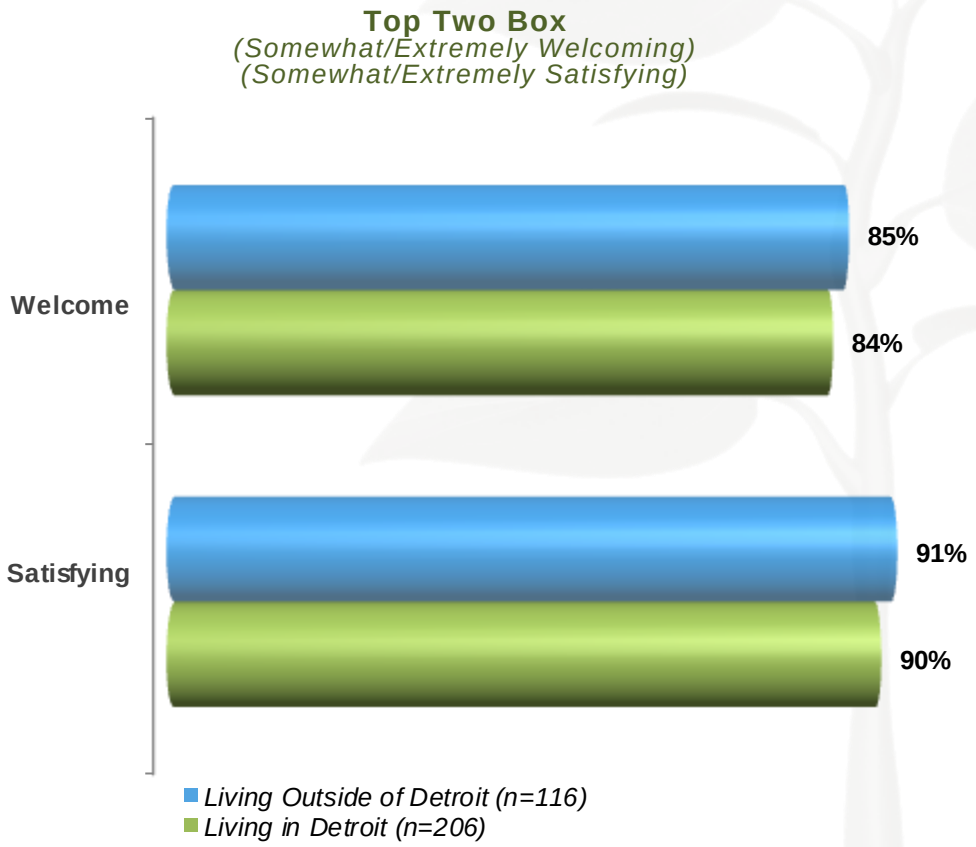


Q13. Typically, how do you get to Belle Isle?
Q13A. Normally, when you visit, how long does it take you to travel to Belle Isle?
Q23. If you were to visit Belle Isle, what is the most likely mode of transportation that you would utilize?
Q23A. If you were to visit, how long do you think it would take you to travel to Belle Isle?

Capital letter indicates a statistically significant difference at a 90% Confidence Level.

Welcome/Satisfied

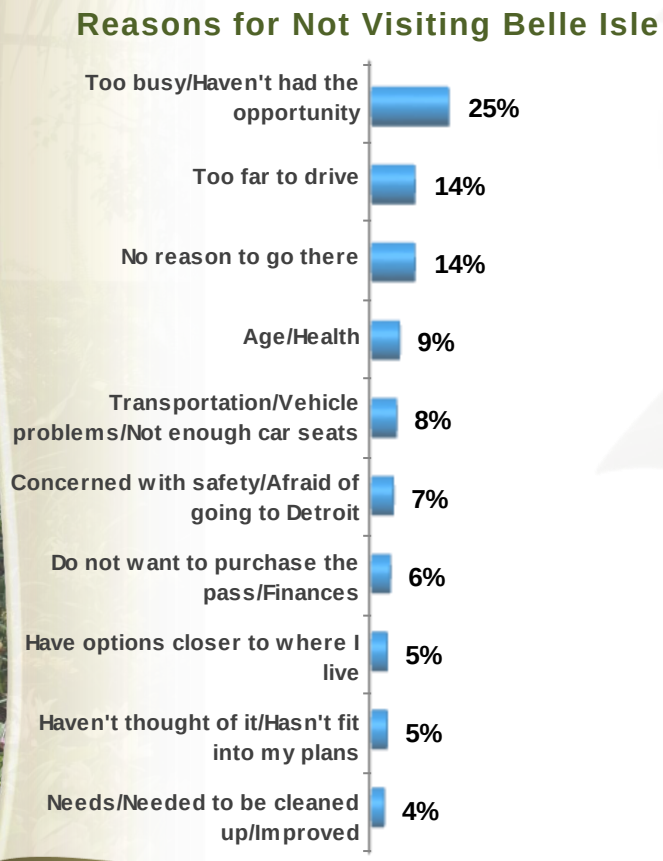
- People who have been to the park within the past year clearly felt welcome and were satisfied with their experience/visit.



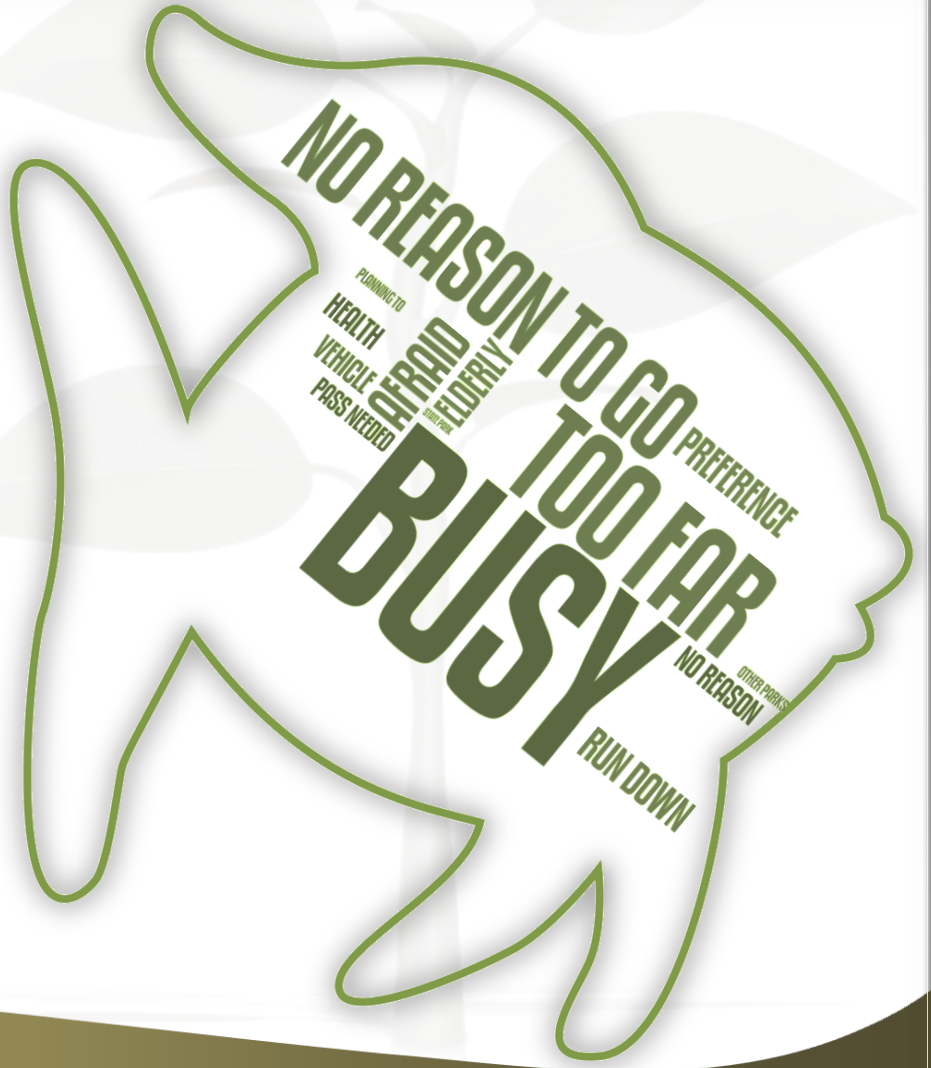
Q28. On a scale of 1 to 5 where 1 is extremely unwelcoming and 5 extremely welcoming, how welcome do you feel when you visit Belle Isle overall?
Q28A. On a scale of 1 to 5 where 1 is extremely unsatisfied and 5 extremely satisfied, how satisfying of an experience is visiting Belle Isle overall?

Reasons for Not Visiting Belle Isle

- There was no extravagant reason for not visiting the park. People simply noted that they were too busy, that it was too far to drive, etc.



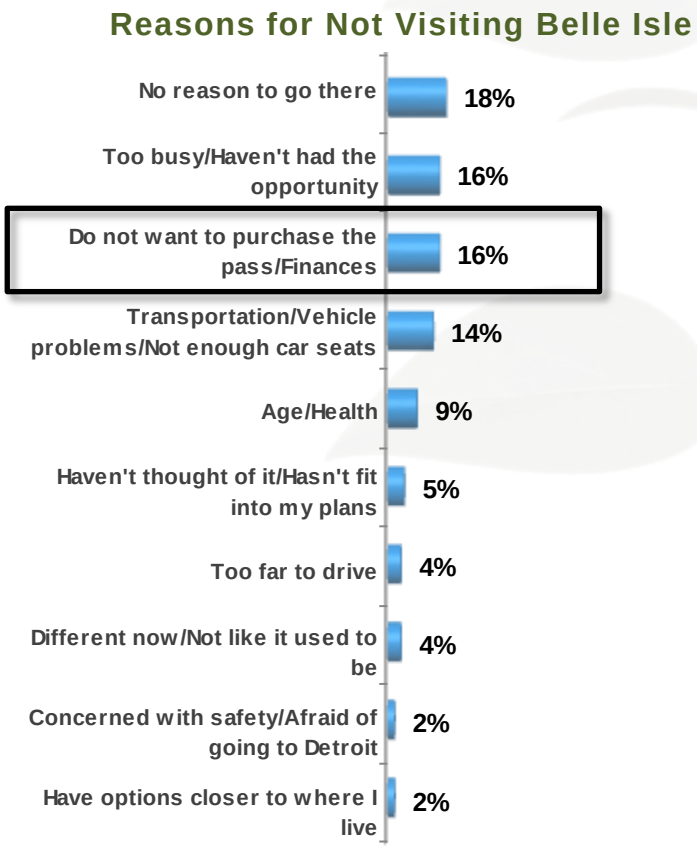
Sample Size: 207



Q16A. You previously indicated that you are aware of Belle Isle Park but have not visited it within the last year. What is the main reason why this is the case?

Reasons for Not Visiting Belle Isle - Detroiters

- Just like the overall sample, there was not one main reason why Detroit residents have not visited Belle Isle in the past year.



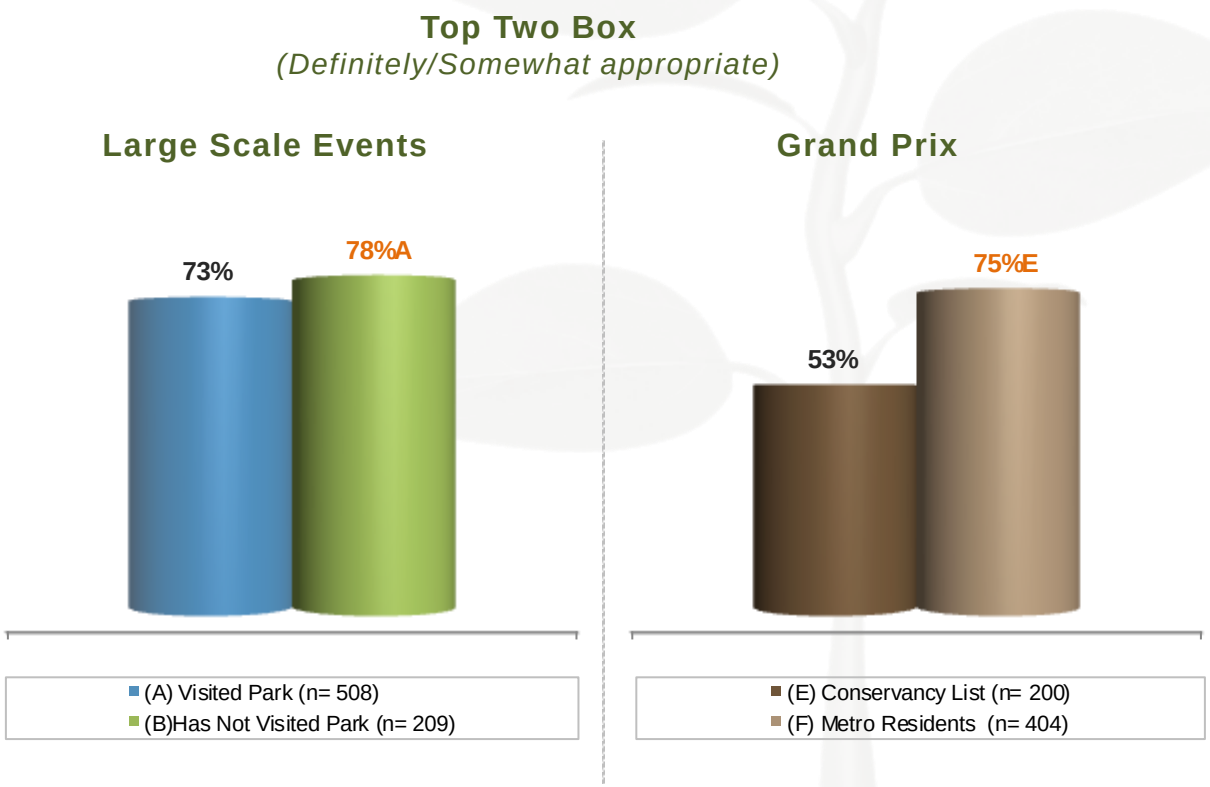
Sample Size: 206

Q16A. You previously indicated that you are aware of Belle Isle Park but have not visited it within the last year. What is the main reason why this is the case?

Additional Insights

Large Scale Events

- The idea of large scale events were relatively popular with among people how had and had not visited the park in the past year.

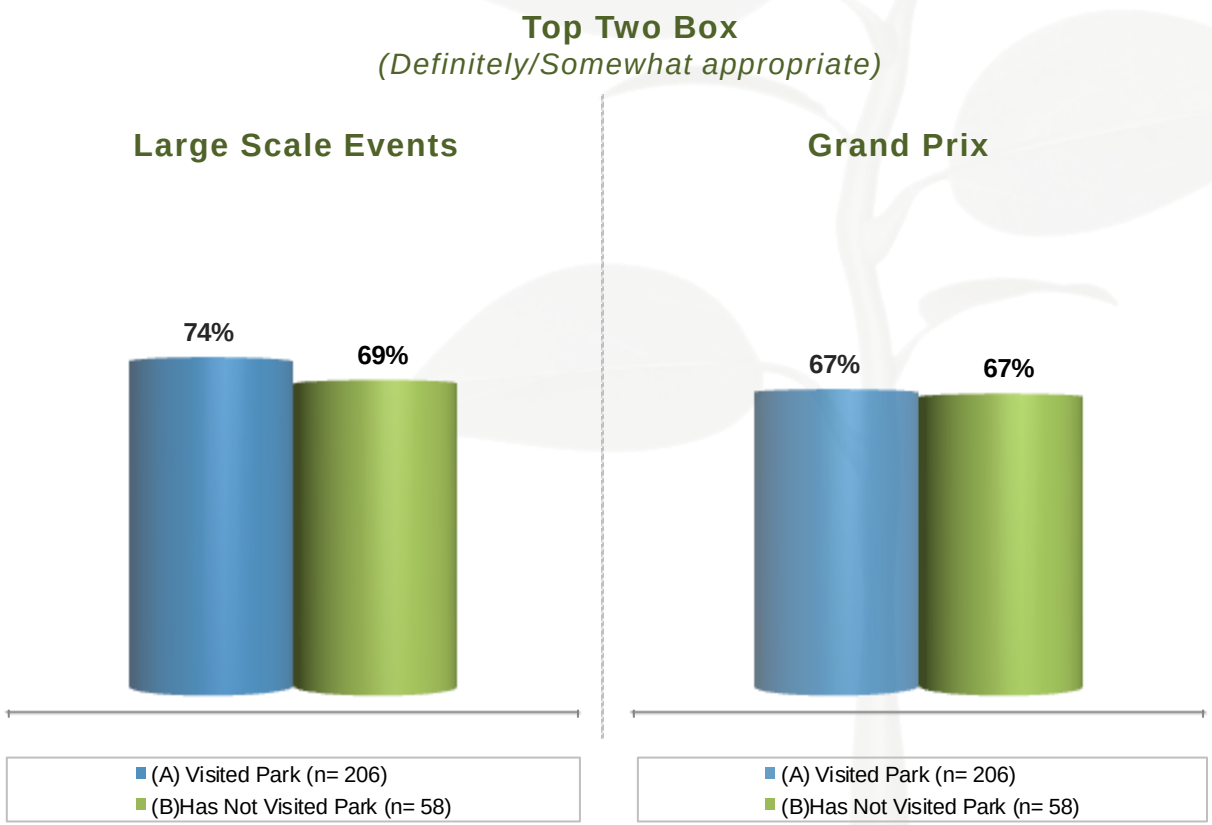


Q37A. On a scale of 1 to 5 where 1 is definitely inappropriate and 5 is definitely appropriate, how appropriate do you feel Belle Isle is for large scale events such as car races, concerts, marathons, etc.?

Capital letter indicates a statistically significant difference at a 90% Confidence Level.

Large Scale Events – Detroiters who have Visited vs Detroit who have not Visited

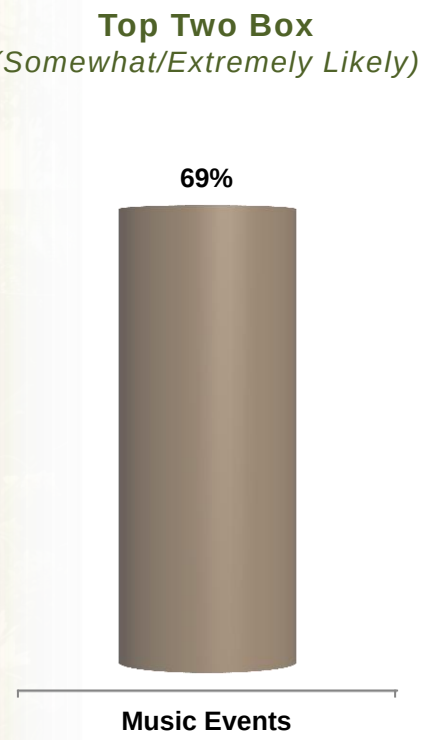
- Among Detroiters, approximately two-thirds felt that Belle Isle was an appropriate location for large scale events as well as the Grand Prix.

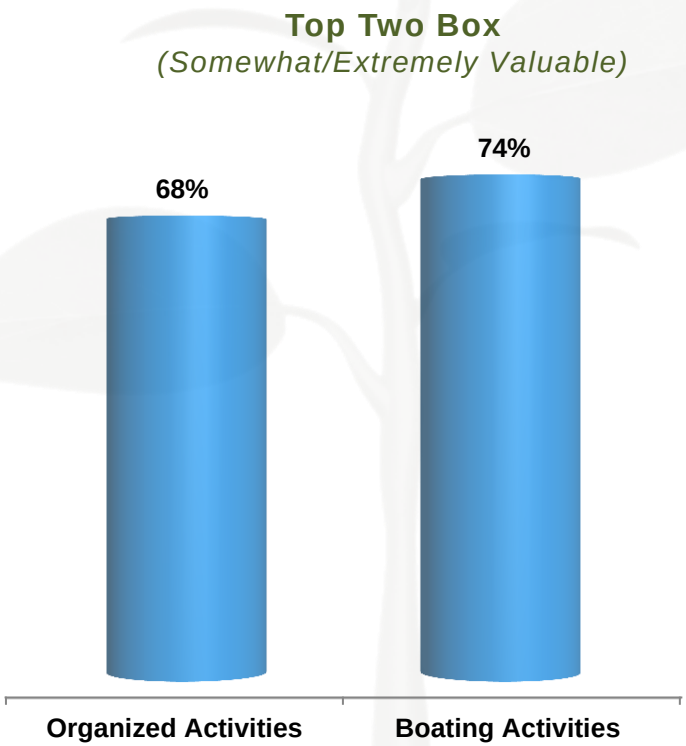


Q37A. On a scale of 1 to 5 where 1 is definitely inappropriate and 5 is definitely appropriate, how appropriate do you feel Belle Isle is for large scale events such as car races, concerts, marathons, etc.?
Q37B. On a scale of 1 to 5 where 1 is definitely inappropriate and 5 is definitely appropriate, how appropriate do you think it is to hold the annual Detroit Belle Isle Grand Prix on the island?

Activities – Add Value/Likelihood to Visit

- The participants liked the idea of adding more music events and making more organized activities available on Belle Isle. But, the concept that would add the most value to the park was additional boating activities.



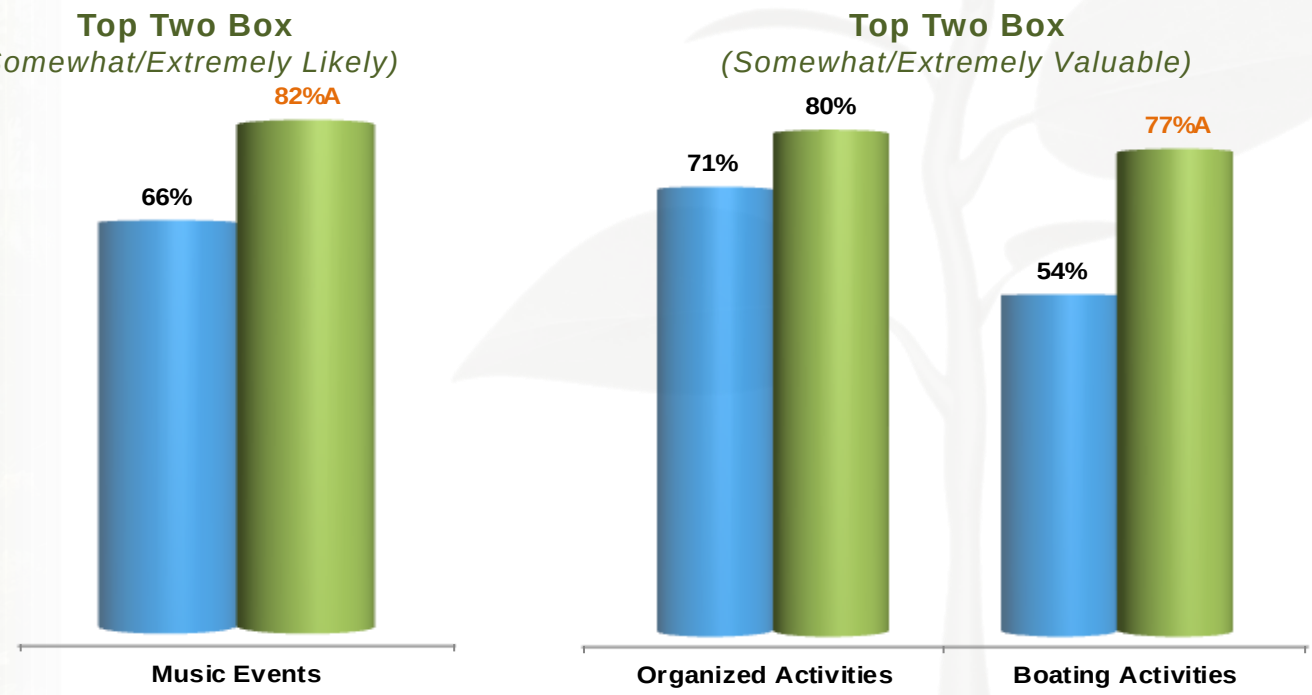


Sample Size: 717

Q33. On a scale of 1 to 5 where 1 is definitely not valuable and 5 is definitely valuable, do you think it would be valuable if additional/expanded organized activities (for example, exercise classes or team/group sports) were available at Belle Isle?
Q35. On a scale of 1 to 5 where 1 is extremely unlikely and 5 extremely likely, how likely would you be to attend Belle Isle if live music events were available?
Q36. On a scale of 1 to 5 where 1 is definitely not valuable and 5 is definitely valuable, how valuable would it be to have more boating activities (like canoeing and kayaking in the canals) available on Belle Isle?

Activities – Add Value/Likelihood to Visit among Detroiters

- Individual Detroit residents who have not visited Belle Isle in the past year were more enthusiastic about music events and boating activities than were Detroiters who have been to the park within the past year.



(A) Visited: n=206
(B) Has not visited: n=58

Capital letter indicates a statistically significant difference at a 90% Confidence Level.

Q33. On a scale of 1 to 5 where 1 is definitely not valuable and 5 is definitely valuable, do you think it would be valuable if additional/expanded organized activities (for example, exercise classes or team/group sports) were available at Belle Isle?
Q35. On a scale of 1 to 5 where 1 is extremely unlikely and 5 extremely likely, how likely would you be to attend Belle Isle if live music events were available?
Q36. On a scale of 1 to 5 where 1 is definitely not valuable and 5 is definitely valuable, how valuable would it be to have more boating activities (like canoeing and kayaking in the canals) available on Belle Isle?

morpace Market Research & Consulting

Creative Minds. Intelligent Solutions.