

Results of Recent Surveys of Martha's Vineyard Residents and Visitors



Martha's Vineyard Commission
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Table of Contents

- 1 Introduction
- 2 Responses Received
- 3 Characteristics of Respondents
- 4 Accommodations
- 5 Travel
- 6 Vineyard Activities and Services
- 7 Opinions on Island Issues

1 Introduction

In 2003 and 2004, the Martha's Vineyard Commission conducted a series of surveys to gain a better understanding of the characteristics, activities, and attitudes of permanent and seasonal residents as well as of visitors to the Vineyard.

We concluded that there was no single method that would provide an accurate profile of the various types of people who live on or come to the Island. The census already provides a considerable amount of information about permanent residents, so we focused our attention on seasonal residents and on visitors. This report summarizes the results of the two largest surveys, the 2003 "Ferry Survey" aimed largely at visitors, and the 2004 "Vineyard Survey" of newspaper readers targeting year-round and seasonal residents. In some cases, the results of both surveys are compared to each other, as well as to other surveys, including a business survey and a survey of air travelers, which were also conducted in 2003. (Note that, as part of this survey program, the MVC also carried out a Visual Preference Survey in 2005. The results of the Business Survey and Visual Preference Survey are available as separate reports.) Some comparisons are also provided to Census information that applies only to permanent residents.

The surveys were funded in part by MassHighway and the Federal Highway Administration. The assistance of the Steamship Authority, Island libraries and supermarkets (used as drop-off points), the Martha's Vineyard Times and the Vineyard Gazette is gratefully acknowledged.

The surveys were carried out with the help of interns Steve Bonavita and Jarita Sadler (2003 - UMass Amherst) and Brian Goodwin (2004 - Princeton). We thank them and also various professionals who helped design the surveys and analyze the results, including Zenia Kotval and David Loomis from UMass Amherst, as well as Daniel Greenbaum. Mr. Greenbaum especially provided assistance and insight through all phases of the survey project and analysis. An appreciative thanks also goes out to Vollmer Associates, which compiled extensive cross-tabulations for each of the two surveys. William Veno, MVC Senior Planner, prepared this summary with the assistance of Mark London, MVC Executive Director.

Many of the survey results were analyzed based on the type of resident or visitor. The surveys used the following definitions:

- "Permanent Resident" is someone whose principal residence is on the Vineyard or who is registered to vote on the Vineyard.
- "Seasonal Resident" is someone who owns a second home on the Island or who regularly rents on the Island for a month or more.
- "Visitor" is someone who comes to the Island for less than a month. This category was broken down into various subcategories, depending on length of stay, including "Day-Trippers" who do not stay overnight. The visitor category includes "Workers", those who live off-Island and work here, or live here and work there; sometimes these results are separated out from the other visitors.

2 Responses Received

The Ferry Survey: The survey administered on the ferries in August 2003 was principally targeted at visitors and other travelers as they left the Vineyard. A total of 102 different ferries departing the Island, representing 30 different departure times on both the SSA and private carriers, were surveyed on a representative sample of 24 days over a five-week period ending on Labor Day. The 1,740 randomly chosen people surveyed and their traveling companions total nearly 6,000 people.

The Vineyard Survey: This survey targeting year-round and seasonal residents was distributed as an insert in each of the two local newspapers – the Vineyard Gazette and the Martha’s Vineyard Times – the second week of August 2004. Over a four-week period, postage-paid envelopes and drop boxes at thirteen Island locations yielded 1,068 usable surveys from a combined newspaper distribution of roughly 32,000 papers (a very large number of people receive both papers). These surveys represented households or traveling parties of more than 3,100 people.

Type of Respondent	2003 Ferry Survey		2004 Vineyard Survey	
Permanent Residents	181	10%	517	48%
Seasonal Residents	326	18%	461	43%
Visitors	1,229	66%	88	8%
[Day-trippers]	[378]	[20%]	[1]	[0%]
Unidentified	121	7%	2	0%
All Responses	1,857	100%	1,068	100%

Both surveys received sufficient responses to be statistically sound, recognizing that there is an innate sampling bias due to the methods by which the surveys were solicited. The Ferry Survey focused on people leaving the Vineyard in August and therefore over-represented the number of visitors compared to permanent and seasonal residents. This especially true of day-trippers, as they constitute a much larger proportion of people on the ferries on a given day as compared to their representation among the total number of people on the Island on any given day. The Ferry Survey also cannot be assumed to be reflective of people traveling by air or personal watercraft. The Vineyard Survey was self-selecting and, since it depended upon who reads the local newspapers, probably under-represented short-term visitors.

Generally, the responses to the Ferry Survey from permanent residents are from Vineyarders who are younger than the overall permanent population in the 2000 U.S. Census figures, perhaps because younger people were more likely to be traveling in mid-summer. Conversely, the responses to the Vineyard Survey from permanent residents are from Vineyarders who are older than the overall permanent population in the 2000 U.S. Census. A couple of explanations for this may be that people busy with jobs and children were less inclined to complete the survey, and some “snow birds” – retirees who winter in the South – are not counted in the census that is taken on the 1st of April.

In addition, as particular responses are divided into finer categories, the statistical confidence in the survey numbers decreases and the margin of error increases. In some breakdowns, particularly by town, the number of responses may fall below that upon which any statistical significance can be attributed and such instances are noted. For example, the number of visitors responding to the Vineyard Survey was relatively small.

Despite the above qualifiers, the responses from these two surveys shed light on a broad range of issues relating to residents and non-residents on Martha's Vineyard.

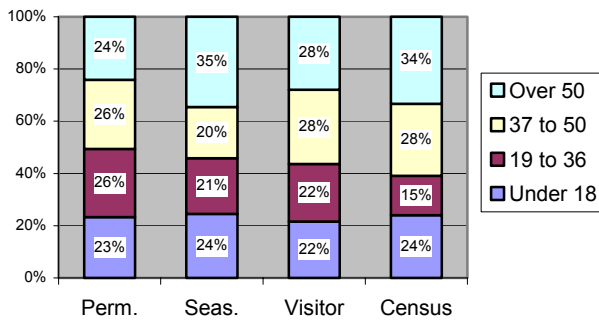
3 Characteristics of Respondents

3.1 Age

The Ferry Survey asked the age categories of everyone in the traveling party. The Vineyard Survey asked the age of only the person completing the survey.

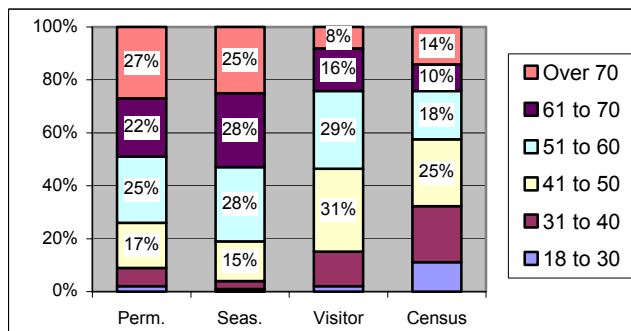
- **Children consistently comprised nearly one-quarter of the population across all groups on the ferries.** About 40% of the Ferry Survey respondents were traveling with children under 18 years of age.
- **It would appear that seasonal residents are somewhat older than permanent residents, while visitors are about the same age.** The percentage of seasonal residents 51 and older was greater than the percentage of permanent residents by 9% in the Ferry Survey and 7% in the Vineyard Survey. The percentage of visitors over 50 in the Ferry Survey was 4% greater than of permanent residents (too small a difference to be significant) and the percentage in the Vineyard Survey was 21% greater, though this sample was too small to be statistically significant.

Age Distribution Represented in Ferry Survey



Age	Permanent Residents	Seasonal Residents	Visitors
Over 50	86	278	1235
37 to 50	94	158	1256
19 to 36	93	172	975
18 or under	83	197	953
Totals	356	805	4419

Age Distribution of Vineyard Survey Respondents



Age	Permanent Residents	Seasonal Residents	Visitors
Over 70	136	113	7
61 to 70	112	129	14
51 to 60	126	130	25
41 to 50	86	68	27
31 to 40	38	12	11
18 to 30	12	6	2
Totals	510	458	86

Note: it is hard to draw other specific conclusions about the ages of various groups because of the inherent sampling bias discussed in section 1, as illustrated below.

- Permanent and seasonal residents in the Vineyard Survey averaged about 60 years in age.

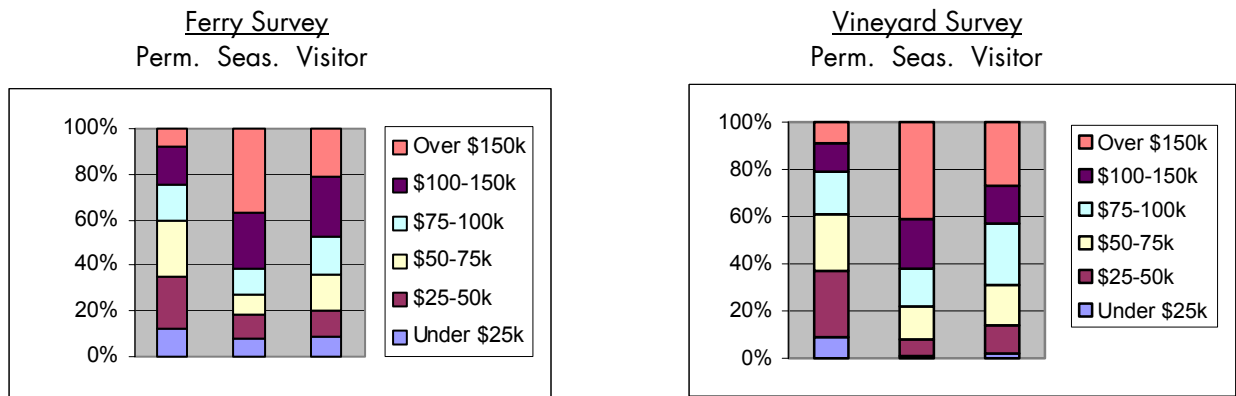
- One-quarter of both permanent and seasonal resident respondents to the Vineyard Survey were over the age of 70. This is twice the year round population tabulated by the 2000 Census.
- Less than 10% of permanent and seasonal resident responses were from people 18 to 40 years, compared to 16% of visitors. This age group comprised 33% of the year round adult population in 2000.

3.2 Income

- **Seasonal residents are by far the highest income group on the Vineyard.**

More than a third of seasonal residents – 41% (Vineyard Survey); 37% (Ferry Survey) – said their household income was more than \$150,000. The average household income was \$145,000 and \$154,000 in the two surveys.

Income Distribution of Survey Responses



Ferry Survey					Vineyard Survey				
Permanent Resident	Seasonal Resident	All Visitor	Day-tripper		Permanent Resident	Seasonal Resident	Visitor	All	
19	25	94	32	Under \$25k	42	7	2	51	
37	28	120	51	\$25-50k	130	27	9	166	
39	25	174	60	\$50-75k	110	56	13	179	
26	35	174	51	\$75-100k	82	65	20	167	
17	35	145	37	\$100-125k	33	49	8	90	
8	36	145	54	\$125-150k	20	35	4	59	
14	110	232	45	Over \$150k	42	167	21	231	
160	294	1084	330	Total Responses	459	406	77	943	

- **Visitors are the next highest income group. About a quarter of visitors – 27% (Vineyard Survey) and 21% (Ferry Survey) – said their household income was more than \$150,000.** The average income ranged between \$117,000 and \$125,000. The average income was just over \$100,000 for day-trippers.
- **Permanent residents are the lowest income group.** Only 9% of permanent residents in both surveys said their household income was more than \$150,000. The average household income was \$80,000. These figures are higher than the 2000 Census income

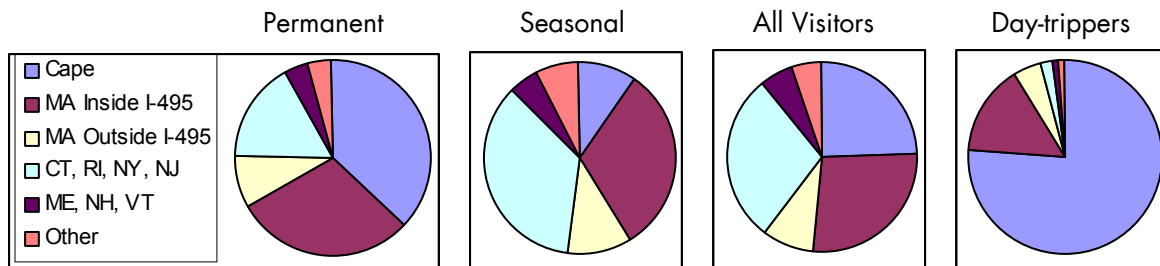
figures for permanent residents (6% earned over \$150,000 and \$45,559 median household income).

3.3 Origins and Destinations of Seasonal Residents and Visitors

The Ferry Survey asked passengers where was their primary destination after leaving the ferry on the mainland. For visitors and seasonal residents, this may be their permanent residences (less likely for day-trippers) or perhaps the next stop on a longer vacation. Passengers on private ferries and the SSA's New Bedford ferry are included in the survey results.

Primary Destination After Leaving Vineyard (by percent)

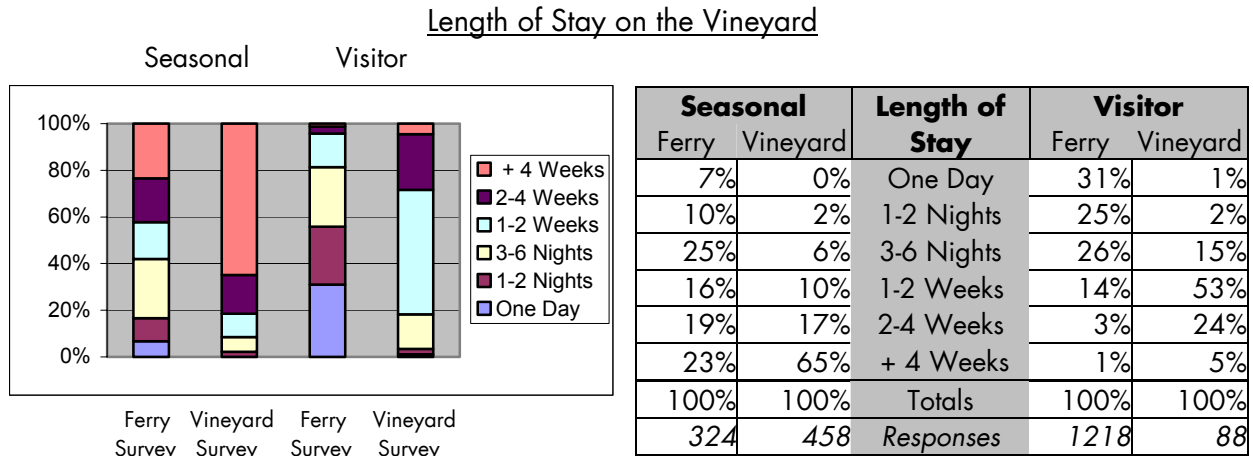
2003	Permanent	Seasonal	All Visitors	Day-trippers	Combined
Cape	37%	10%	25%	77%	22%
MA Inside I-495	29%	30%	27%	15%	26%
MA Outside I-495	9%	10%	9%	5%	10%
CT, RI, NY, NJ	17%	35%	29%	2%	32%
ME, NH, VT	4%	5%	6%	1%	5%
Other	4%	7%	5%	1%	6%
Total	100%	97%	101%	101%	101%
Responses	178	321	1194	371	1736



- **Three-quarters of day-trippers were destined for Cape Cod and another 15% to the Boston area.**
- **One-third of all ferry passengers traveled to Connecticut, Rhode Island, New York and New Jersey, more than any other destination.** Seasonal residents (35%) and visitors (29%) had the highest percentages to these states. These percentages jump to 42% and 53%, respectively, when looking at just passengers with cars on the Woods Hole ferries.
- **The Boston area is the destination for 27 to 30% for all groups, except day-trippers, and a quarter (26%) of all ferry passengers leaving the Vineyard.**
- **Two-thirds of permanent residents were headed to Cape Cod (37%) or the Boston area (29%)**
- **Roughly a quarter (22%) of all ferry passengers headed for Cape Cod.**

3.4 Length of Stay

Visitation patterns differed dramatically between the two survey methods, presumably because people who stayed on the Island for shorter periods of time were over-represented on the ferry and under-represented among newspaper readers. (Note that the sample of visitors on the Vineyard Survey was too small to be significant.)



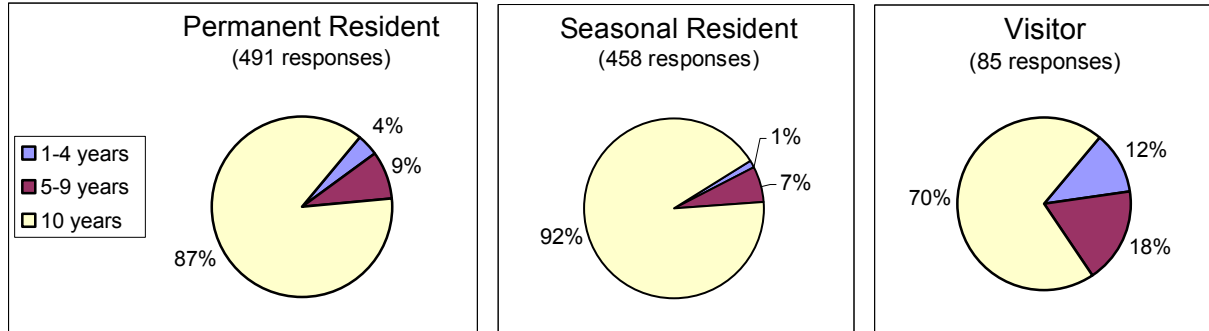
- **Of visitors taking the ferry, about one third (31%) were day-trippers (including 8% on work or business trips), a quarter (25%) stayed for 1 or 2 nights, another quarter (26%) for 3 to 6 nights, and a fifth (18%) stayed for more than a week.**
- **Combined, seasonal residents and visitors in the Ferry Survey were evenly distributed among people who were day-trippers (26%), staying 1 to 2 nights (22%), staying 3 to 6 nights (26%) and those staying more than a week (26%).**

3.5 Previous Visitation to the Island

- **A vast majority of permanent residents have lived on the Vineyard for ten or more years.** In the Vineyard Survey 87% of permanent residents said they had been on the Vineyard every year for the past decade. In the Ferry Survey, 65% of permanent residents reported living on the Vineyard for more than ten years and another 13% for more than five years. These percentages are close to the 2000 Census figure of 81% of year-round householders having lived on the Vineyard for at least the previous five years.
- **A still greater proportion (93%) of seasonal residents have been coming to the Vineyard for more than ten years.**
- **Even most visitors have come regularly for a decade or more.** 70% of visitors (neither own a Vineyard home nor visit for more than a period of four weeks) reported having at least a ten-year-long relationship with the Island. This is quite different from the results of the 1984 survey that showed 41% of SSA passengers visiting the Vineyard for the first time, but some of the difference is likely due to the self-selection of the Vineyard Survey – visitors

with a stronger interest in the Island were more likely to take the initiative to complete the survey. [This question was not asked in the Ferry Survey.]

Number of the Past Ten Years Spent on the Vineyard (Vineyard Survey)



3.6 Future Relationship with the Island

- Half the seasonal residents anticipate living on the Vineyard within five years.** 51% of seasonal resident respondents in the Ferry Survey (not asked in the Vineyard Survey) said they see themselves living on Martha's Vineyard in the next five years. [Note: If the survey is representative of the estimated 39,000 seasonal residents in 2000, and their anticipations become reality, this would more than double the Vineyard's 2000 permanent population of 15,000 residents by 2010.]
- About one sixth of visitors also anticipate moving to the Vineyard.** In the Ferry Survey, 21% of visitors staying one week or more and 11% of visitors staying less than a week see themselves living on the Island within five years.
- However, nearly one in six current residents anticipate moving off the Island.** 16% of permanent residents responding to the Ferry Survey said they did not see themselves living on the Island in five years. While little confidence can be given to characteristics of this small sample, these 30 Vineyarders have only a slightly shorter tenure but nearly a 22% lower average income than that of all permanent resident respondents. Nearly one-third (9) of the responses came from Oak Bluffs, which also had the most responses in this small sample living on the Vineyard for 10 years or less.

Permanent Residents Intending to Move from Vineyard in 5 Years (30 responses)								
Town	Responses	Average Home Size	Years on Vineyard			Income		
			<= 10	> 10	Average	<\$50K	=>\$50K	Average
Edgartown	5	3.00	2	3	19.0	3	2	\$57,500
Oak Bluffs	9	2.14	5	4	10.9	4	5	\$52,444
Tisbury	8	3.50	2	4	17.7	3	4	\$60,286
West Tisbury	4	3.67	0	4	20.5	2	2	\$46,125
Not Specified	4	4.00	1	2	17.0	1	2	\$129,167
Total	30	3.04	37%	63%	16.0	46%	54%	\$62,625
All Permanent Responses		3.20	35%	65%	23.5	35%	65%	\$80,000

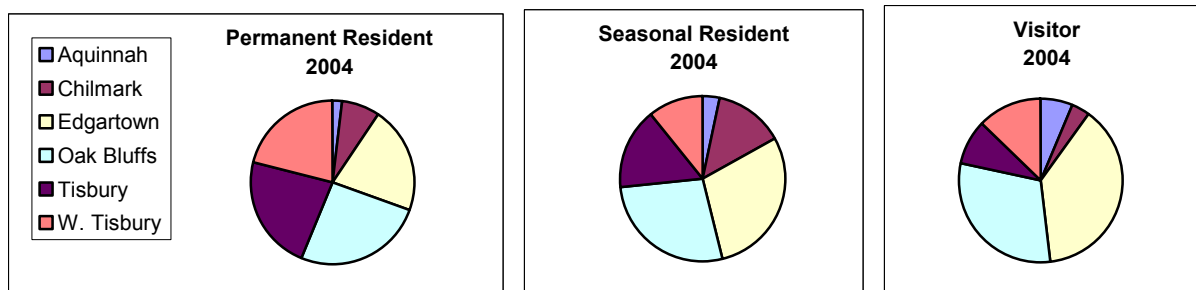
4 Accommodations

4.1 Where People Stay

Both surveys' distributions of permanent and seasonal resident responses among the six Vineyard towns closely mirror the comparable 2000 Census numbers.

- **Three-quarters of the permanent residents are even distributed among the three down-Island towns.**
- **Chilmark houses about as many seasonal residents as does Tisbury – as much as Aquinnah and West Tisbury combined.**
- **Edgartown and Oak Bluffs each host more than one-third of visitors spending the night on the Vineyard stay in Edgartown.**

Town in Which Vineyard Survey Respondent Stayed



Vineyard Survey	Permanent	Perm. (Census)	Seasonal	Seas. (Census)	Visitor [small sample]	All
Aquinnah	2%	2%	3%	4%	6%	3%
Chilmark	8%	6%	14%	13%	4%	10%
Edgartown	21%	25%	29%	34%	38%	26%
Oak Bluffs	25%	25%	27%	27%	30%	27%
Tisbury	23%	26%	16%	12%	9%	19%
W. Tisbury	21%	16%	11%	10%	13%	16%
MV	100%	100%	100%	100%	100%	100%
Responses	486		437		79	1002

Town in Which Ferry Survey Respondent Stayed

Ferry Survey	Permanent Resident	Seasonal Resident	All Visitors	Visitor week +	Visitor 1-6 nights	All
Aquinnah	5%	3%	1%	2%	1%	3%
Chilmark	4%	16%	7%	7%	7%	13%
Edgartown	20%	28%	37%	46%	34%	56%
Oak Bluffs	30%	29%	36%	24%	41%	57%
Tisbury	23%	16%	12%	13%	12%	22%
W. Tisbury	18%	9%	6%	8%	6%	13%
MV	100%	100%	100%	100%	100%	164%
Responses	169	306	830	218	612	1305

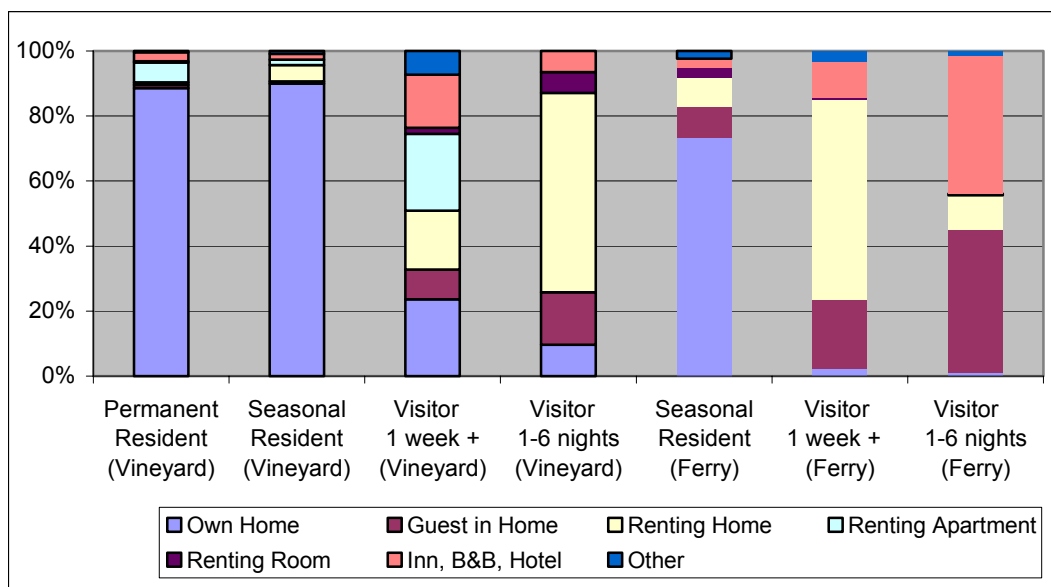
- **Visitors staying 1 to 6 nights were more likely to stay in Oak Bluffs (41%), while visitors staying longer than one week were more likely to stay in Edgartown (46%).**

4.2 Type of Accommodations

The length of stay significantly influences the type of accommodations used by visitors. This was true in both surveys, but the variation differed widely between the surveys. The Vineyard Survey contains a very small sample of visitors and the Ferry Survey is more likely to account for visitors who where guests. [Note that “renting an apartment” was not an option for respondents of the Ferry Survey.]

- **About 90% of permanent residents lived in homes that they owned** (Vineyard Survey). (Note: this is greater than the 2000 Census figure of 74%). Permanent residents who rented were most likely to be in apartments (60%, but small sample).
- **The great majority of seasonal residents (74% in the Ferry Survey and 90% in the Vineyard Survey) stay in homes they own.** Fewer than one in ten seasonal residents rent a home. A similar number may stay as guests of other Vineyard homeowners. About 8% (Vineyard Survey) to 15% (Ferry Survey) of seasonal residents rent their Vineyard accommodations, mostly likely houses.
- **Overnight visitors are just as likely to be guests of friends or relatives than stay in hotels, inns or B&Bs.** The two types of accommodations each accounted for 1/3 of all visitors. More than two in five overnight visitors staying less than one week stayed as guests (44%) or in hotels, inns or B&Bs (43%). Short-term visitors are twice as likely to be guests than visitors staying more than a week.

Type of Accommodations by Resident/Visitor Type

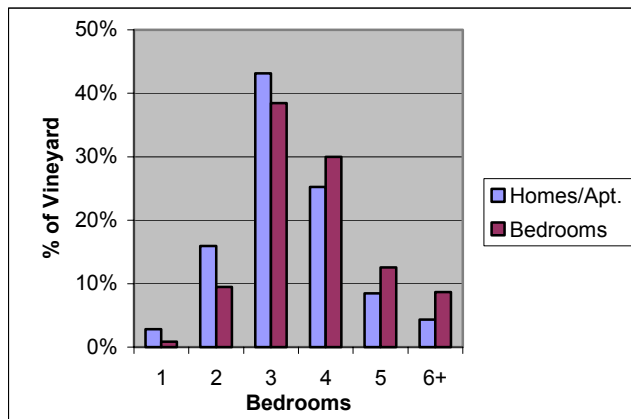


Accommodation Type	Permanent Resident (Vineyard)	Seasonal Resident (Vineyard)	Visitor 1 week + (Vineyard)	Visitor 1-6 nights (Vineyard)	Seasonal Resident (Ferry)	Visitor 1 week + (Ferry)	Visitor 1-6 nights (Ferry)
Own Home	448	413	13	3	222	5	5
Guest in Home	5	3	5	5	28	47	258
Renting Home	4	23	10	19	27	136	61
Renting Apartment	31	8	13	0	Not asked	Not asked	Not asked
Renting Room	2	0	1	2	9	1	3
Inn, B&B, Hotel	14	8	9	2	9	25	248
Other	2	4	4	0	7	7	8
Total Responses	506	459	55	31	302	221	583

4.3 Size of Households

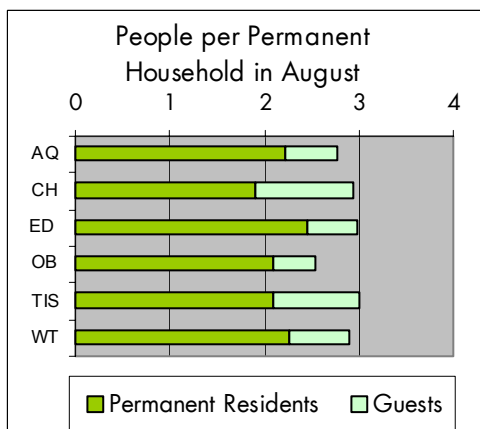
Both surveys asked the number of people with the respondent, but the Vineyard Survey also asked the number of bedrooms in the accommodations.

Distribution of Homes and Bedrooms by Number of Bedrooms in Homes



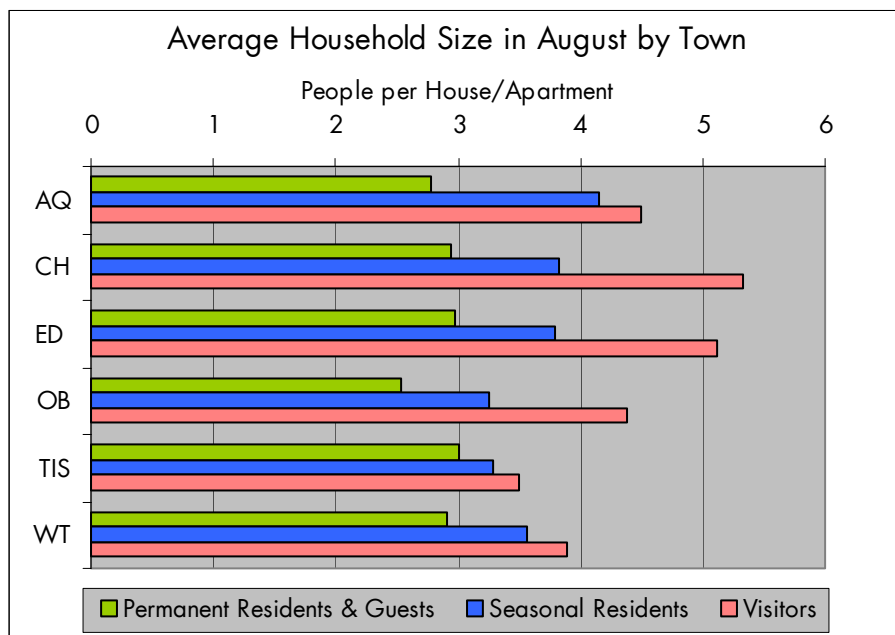
Bedrooms In Home	Homes (Responses)	% All Homes	# of Bdrms	% All Bdrms
1	26	3%	26	1%
2	147	16%	294	10%
3	398	43%	1194	38%
4	233	25%	932	30%
5	78	9%	390	13%
6+	40	4%	270	9%
6	20	2%	120	4%
7	10	1%	70	2%
8	10	1%	80	3%
Total MV	922	100%	3106	101%

- **Seasonal homes average 20% more bedrooms (3.6) than the homes of permanent residents (3.0).** Almost 40% of seasonal residents' homes have more than three bedrooms compared to 25% of the homes of permanent residents.



- **In August, there are about two guests for every three homes of permanent residents (.65 guests per home).** Chilmark has the highest average occupancy of guests (1.03), increasing its year-round occupancy of year-round homes by more than 50%. Oak Bluffs has the lowest average number (.45) of guests per permanent residence.

- **The average number of people staying in a house inversely reflects the length of stay.** Homes accommodating visitors had the greatest average number of people at 4.6 for the Vineyard (ranging between 3.5 in Tisbury and 5.3 in Chilmark). Homes accommodating seasonal residents had the next highest number of people, 3.6 (ranging between 3.3 in Oak Bluffs to 4.2 in Aquinnah). Homes accommodating permanent residents, including guest, on average had the least number of people, 2.9 Island-wide (ranging between a low of 2.5 in Oak Bluffs to a high of 3.0 in both Edgartown and Tisbury).



4.4 Period of Occupancy and Rental Activity

[Note: Questions about whether and how frequently homeowners rented out all or portions of their homes were asked only in the Vineyard Survey. Consequently, the responses are not likely to represent seasonal homeowners who are not on-Island in August.]

- **10% of permanent residents do not occupy their Vineyard home throughout the winter season.** Although half of these are rented out, 1 in 20 permanent residents' homes lie vacant in the winter.
- **Even with rentals, seasonal homes are occupied only 38% of the year.** Seasonal homes go unoccupied 15% of the three summer months.
- **More than one in five seasonal residents rent out their homes whereas 15% of the permanent residents rent out all or part of their accommodations.**
- **Both permanent and seasonal homeowners rent out their homes at the same proportions.** 5% of both groups rent during the off seasons and both rent 8% of their homes in the summer.
- **About 13% of permanent residents who rent out their homes indicated that they own another Vineyard property with a home on it.** Some homes contain

apartments or rooms that can be rented while the owners continue to occupy the home. This explains why there is more than 100% occupancy (negative time unoccupied) of permanent residents' homes in the summer.

Type of Home Occupancy by Season

	<u>Fall</u>	<u>Winter</u>	<u>Spring</u>	<u>Summer</u>	<u>Total</u>
Homes of Permanent Residents					
Percent time occupied by owner	95%	90%	93%	96%	94%
Percent time occupied by renter	5%	5%	5%	8%	6%
Percent time unoccupied	0%	5%	2%	-4%	1%
Homes of Seasonal Residents					
Percent time occupied by owner	32%	10%	10%	77%	32%
Percent time occupied by renter	5%	5%	4%	8%	6%
Percent time unoccupied	63%	85%	86%	15%	62%

5 Travel

5.1 Number of Vehicles

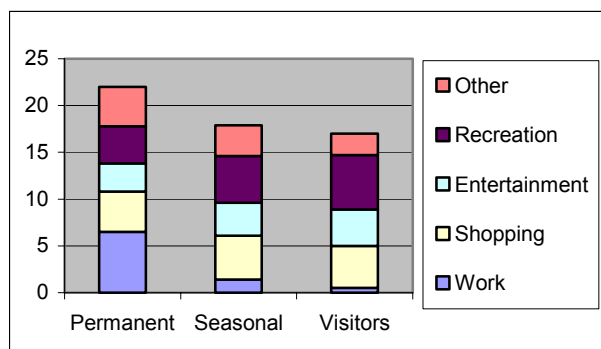
- **The average number of registered motor vehicles per year round household is between 2.0 (Vineyard Survey) and 2.5 (Ferry Survey).** This held true across all towns and across all incomes except that 65% of householders with incomes under \$25,000 had just one vehicle.
- **Seasonal residents and visitors, on average, have access to 1.5 vehicles on the Vineyard.** Only 7% of visitors' vehicles are rented.
- **About 40% of seasonal residents register one or more vehicles on the Vineyard.** More than half the seasonal residents leave their vehicles on the Vineyard all year, and one-quarter of these leave more than one vehicle.
- **20% or more residents and visitors on Martha's Vineyard keep another car on the Cape.** One in five permanent respondents also has access to a vehicle on the Cape. An even higher ratio – nearly one in four (24%) – of seasonal residents and visitors reported having access to a vehicle on the Cape. [Possibly, their vehicles parked during their stay on the Vineyard.]

5.2 Volume and Purpose of On-Island Vehicle Trips

[Note that the surveys asked for information about the numbers of vehicular trips, for use in transportation planning; however, this methodology cannot be considered as accurate as other techniques such as using traffic counters or having motorists fill out travel logs of their movements over a period of time. While these survey results help in comparing the number of trips by type of destination and type of user, traffic surveys conducted by the Martha's Vineyard Commission suggest that the actual total number of trips would be higher than the numbers indicated here.]

The average number of personal vehicle trips made per week on the Island was 22 for permanent residents, 18 for seasonal residents, and 17 for visitors. The additional trips by permanent residents were work trips. The permanent residents' number seems unusually low. [The averaged estimate of permanent residents is less than two-thirds the customary average ascribed for residences.]

Number of Vehicle Trips per Week – August 2004



	Permanent	Seasonal	Visitors
Work	29.0%	7.8%	2.9%
Shopping	19.2%	26.1%	26.2%
Entertainment	13.4%	19.4%	22.7%
Recreation	17.9%	27.8%	33.7%
Other	20.6%	18.9%	14.6%
All purposes	100.0%	100.0%	100.0%
<i>Weekly Trips</i>	<i>22.4</i>	<i>18.0</i>	<i>17.2</i>

- **Recreational trips comprised the largest share of trips for visitors (six per week or over one-third of all trips) and for seasonal residents (five per week, or almost one-quarter of all trips).**
- **Work and business accounted for the most trips for permanent residents.**
- **Shopping accounted for a major portion of the travel for all groups, with about four trips per week for each group.** However, the ambiguity of the question had some respondents including grocery shopping in this category while others did not.

6 Activities, Services & Expenditures

6.1 Activities

- **Participation in activities varies widely, but seasonal residents and visitors generally participated between 10 and 20 percentage points more than permanent residents.**
- **Shopping ranked as the activity in which two-thirds or more of all groups were most engaged; beach going and swimming ranked second, and going to restaurants ranked third.** With day-trippers, beach –going and swimming did not rank second since only a quarter participate. [Note: the fact that “shopping” ranked high among permanent residents suggests some may have interpreted the category to include groceries and other necessities rather than as strictly a recreational activity.]
- **Activities in which at least half of a population type participates include shopping, restaurants, walk/hiking, sightseeing and nature viewing.** Seasonal resident and visitor engagement in walk/hiking, sightseeing and nature viewing cited in the Vineyard Survey was consistently 20 percentage points or more than in the Ferry Survey. Without the Vineyard Survey numbers, sightseeing and nature viewing would not have met the 50% threshold.

Percentage of Respondents Engaged in Activity in Last Week**				
Ordered by Highest Rates of Participation				
[Ferry Survey / Vineyard Survey]				
Activity	Permanent Residents	Seasonal Residents	Visitors	Day-tripper
Shopping	/ 82	79 / 84	79 / 65*	76 / *
Restaurants	/ 55	81 / 66	78 / 57	66 /
Beach/Swimming	/ 55	87 / 77	64 / 65	27 /
Walking/hiking	/ 41	70 / 53	60 / 43	49 /
Sightseeing	/ 14	54 / 26	68 / 27	72 /
Nature viewing	/ 23	55 / 29	45 / 24	31 /
Bicycling	/ 24	43 / 39	26 / 30	12 /
Art galleries	/ 16	44 / 33	26 / 21	10 /
Movies	/ 25	46 / 32	14 / 16	3 /
Nightlife	/ 17	44 / 16	31 / 15	4 /
Boating	/ 15	35 / 30	14 / 7	3 /
Fishing	/ 13	29 / 23	11 / 15	1 /
Antiquing	/ 7	28 / 14	18 / 12	9 /
Golfing	/ 10	19 / 18	8 / 8	2 /
Other	/ 18	na / 13	na / 6	na
Responses	/ 517	326 / 461	1229 / 88	378 /

Activities in which at least half of a population type participates labeled in **bold**.

Highest rate of participation for each population also in **bold**.

** No time restriction for Ferry Survey question

* Overall small sample size

- **The most frequent activity of visitors involved in recreational activities was walking or hiking – about five times a week – followed closely by going to the beach, bicycling and sightseeing.**
- **Four of five participants – whether visitors or seasonal residents – expressed satisfaction with most activities.** The only activities with less than an 80% “satisfied” or “very satisfied” rating were shopping, antiques, nightlife, and going to the movies. Visitors also gave golf a “very satisfied” rating of slightly less than 80%.
- **The activities most popular with day-trippers were sightseeing, shopping and eating at restaurants.** In addition to these activities, going to the beach and walking/hiking were the most popular with visitors staying more than one day. The most popular activities for seasonal residents were going to the beach, walking/hiking and eating at restaurants.

6.2 Satisfaction with Public Services

- **Island services generally received good marks.** All categories of people showed the greatest satisfaction with the Island libraries. Also receiving very high marks were conservation properties followed by fire protection, emergency medical services and bike paths.
- **Most respondents were not satisfied with parking and public restrooms.** Less than one-half of the permanent residents indicated satisfaction with garbage disposal services.

Percent Respondents Satisfied or Very Satisfied with Public Services

Vineyard Survey (Ferry Survey)	Permanent	Seasonal	Visitor	Day-tripper
Libraries	90	91	79	
Conservation Properties	88	90	92	
Fire Department	82	76	80	
Emergency Medical/Hosp	81	80	88	
Bicycle Paths	71	81	81	
Schools	70	57	Small sample	
Town Parks/Ball Fields	69	73	82	
Police Department	67	74	77	
Health Advisory	66	51	Small sample	
Road Maintenance	62	78	85	
Direction Signs	53	66 (71)	82 (70)	(66)
Garbage Disposal/Litter	46	57	58	
Public Restrooms	31	43 (54)	57 (54)	(48)
Parking	15	23	30	

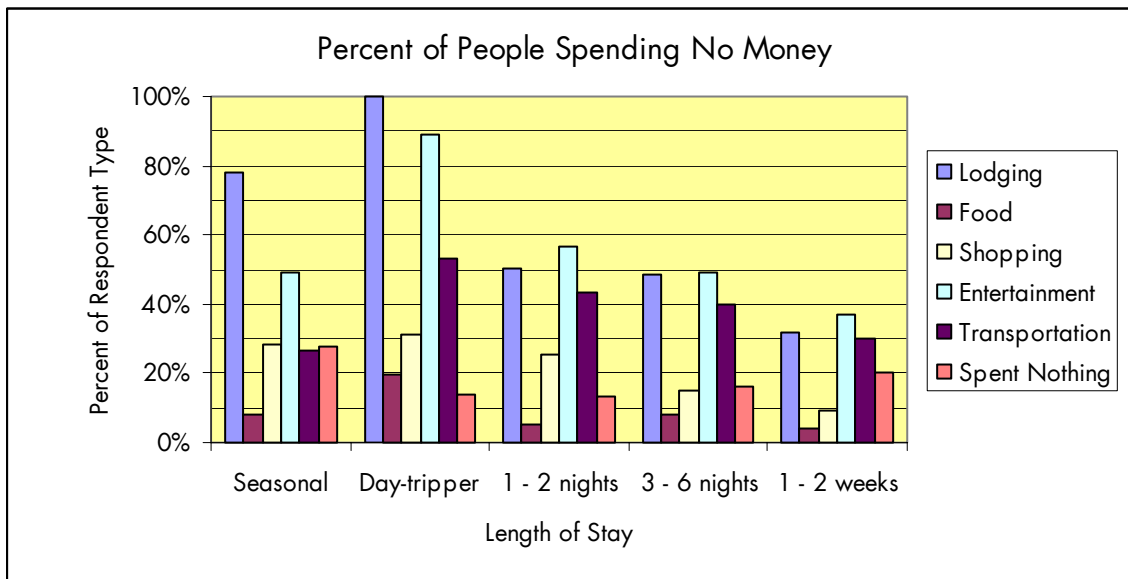
6.3 Expenditures

Ferry passengers leaving the Vineyard were asked in the Ferry Survey to estimate their expenditures while on the island. The analysis assumes responses are for expenses of the

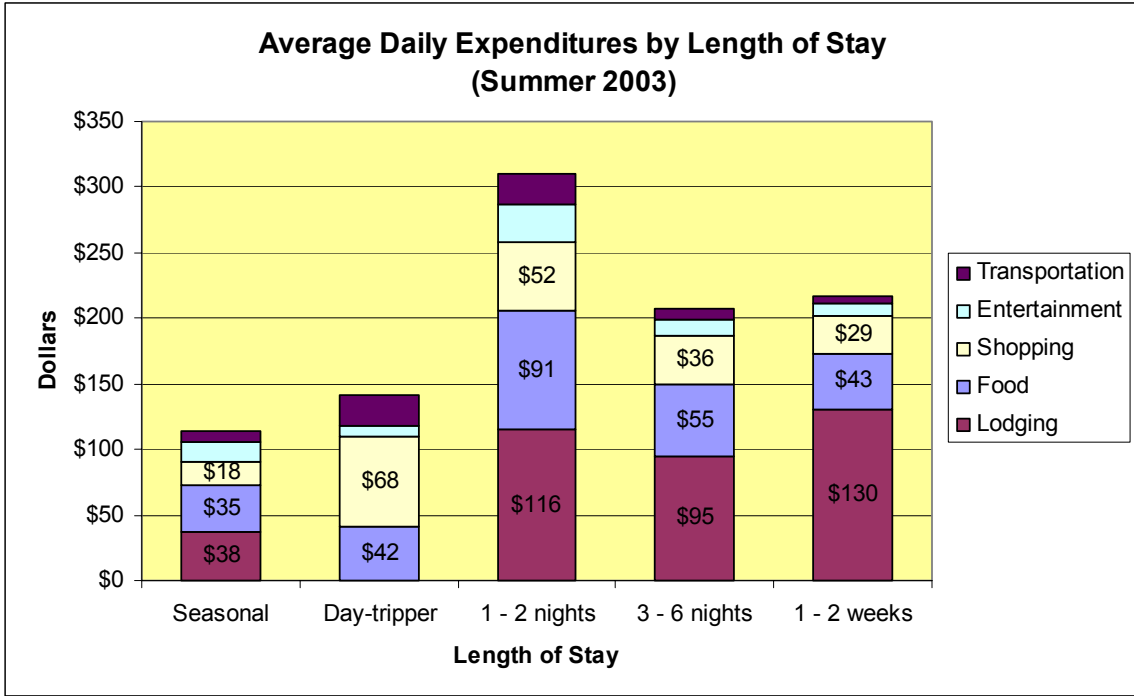
respondent's traveling party although some people might have answered for the individual who answered the question. Also there were too few responses from visitors staying more than two weeks, so they are not presented here.

Finally, the numbers of people reporting "no expenditures" for various categories (as opposed to leaving the question blank) are consistently high percentages of responses among all classes of visitors and all categories of expenditures. The people who spent nothing were added to those who did spend money to calculate and overall average expenditures. Thus, expenditures by people spending money had to be significantly higher than the averages to offset the number of people who spent nothing.

- **Between 14 and 28% of each group reported spending nothing on their current stay on the Vineyard.** Perhaps counter-intuitively, the longer the stay, the higher the percentage of people reported zero expenditures on Island: day-trippers and visitors staying 1-2 day = 14%; visitors staying 3-6 nights = 16%; visitors staying 1-2 weeks = 20%; seasonal residents (whose average stay was 1-2 weeks) = 28%.



- **Half of visitors staying less than a week spent nothing for lodging or entertainment.** The lodging figure closely tracks the 44% of this group that said they stayed as guests in a house (see section 4.3).
- **About one-third of visitors staying 1 to 2 weeks reported spending no money on lodging (32%) or entertainment (37%).**
- **Only about one in ten day-trippers spent money on entertainment.**
- **Half of seasonal residents spent nothing on entertainment (reflecting the popularity of hiking and enjoying the beach).**
- **Day-trippers were most likely to spend nothing on shopping (31%) or transportation (53%).**



- **Visitors staying 1-2 nights averaged the highest amount of daily expenditures – \$300. Visitors staying from three nights to two weeks spent an average of a little over \$200 per day. Lodging accounted for 37 to 60% of these daily expenses.**
- **Day-trippers said that they spent \$145 on average, more than seasonal residents (\$110). Discounting lodging expenses, day-trippers spent more per day than any group other than visitors staying just 1-2 nights.**
- **Daily spending on shopping declined the longer people stayed on Island. Day-trippers spent nearly a third (31%) more than the next closest group.**

7 Opinions on Island Issues

Overall, the opinions of the permanent residents, seasonal residents and visitors do not vary greatly. The responses from the two surveys to a series of opinion questions were quite similar, although the Vineyard Survey respondents, especially seasonal residents, tended to be slightly more pro-environment and anti-development than respondents to the Ferry Survey. (Unless otherwise specified, the results quoted in the summary statements are from the Vineyard Survey.)

- **There was near universal agreement that preserving the Vineyard's environment and character is a high priority and promoting development was a low one.** Virtually everyone in both the Ferry and Island surveys agreed with this statement, as did over 89% of the business owners and managers in the Business Survey. Fewer than 10% of the people agreed that promoting development was a high priority.
- **Most people thought that the summer population was maxed out, but opinions varied significantly by residency and length of stay.** Roughly 70% to 80% of permanent and seasonal residents in both surveys thought that the summer population should not grow much (as did a majority, 54%, of businesses). In fact, fewer than 5% of people thought the summer population could grow without major problems (8% of businesses). Relating to both preservation of character and concern about additional summer growth, only 9% of people thought that the Vineyard needs more resort, tourist-oriented, active recreational facilities, and even fewer (7%) thought the Island community should make every effort to attract more visitors (29% of businesses favored more such facilities).
- **There is less clear consensus regarding the growth of the year-round population.** Not quite half (48%) of permanent residents agreed that the Island's year-round population should not increase much. More than a third (35%) of businesses, 30% of seasonal residents and a quarter (24%) of visitors agreed. Conversely, between 15 and 24% of all groups, including businesses, felt the year-round population could grow considerably without much problem.
- **Visitors generally perceived less congestion and were less concerned about growth than permanent or seasonal residents.**
- **People strongly favored stricter controls over the quantity and quality of development.** Support for these controls varied from 64% for permanent residents and 65% for visitors, to 74% for seasonal residents. Fewer than 6% thought that these controls should be relaxed.
- **People favored maintaining the status quo with respect to the ferry and road capacity.** In the Vineyard Survey, half the people thought that the ferry capacity for cars during the summer should continue to be restricted, even though it meant that they might not be able to make a reservation when they wanted, compared to 30% who disagreed. Less than 30% of each group favored increasing the number of ferries to and from the Island. However, people surveyed on the ferries were less inclined to agree; only about one-third of the permanent and seasonal residents, and just 13% of visitors, surveyed on the ferries agreed with the restriction on cars. Only 20% of people in the Vineyard Survey (24% of permanent

residents) thought the road network should be expanded. Slightly more respondents to the Ferry Survey agreed with the expanding the road capacity, although a lower percentage (15%) of permanent residents favored this.

- **The majority of permanent residents favored Island-wide funding of affordable housing and of elementary and middle schools.** Of permanent residents, the proportion that favored Island-wide funding of affordable housing was 68% and of schools was 55%. The support was somewhat lower for seasonal residents and visitors, but for all groups, more people supported rather than opposed Island-wide funding.

Opinions on Island Issues	Ferry Survey (2003)/ Vineyard Survey (2004)			Business Survey (2003)
	Permanent Residents	Seasonal Residents	Visitors	
Preserving the MV environment and character is a high priority	91 / 97	95 / 99	95 / 99	89
Promoting new development/growth is a high priority *	* / 10	* / 4	* / 6	18
Martha's Vineyard summer population should not increase much.	69 / 76	73 / 82	57 / 77	54
Summer population could grow without major problems.	6 / 5	11 / 3	12 / 2	8
Year-round population should not increase much	46 / 48	25 / 30	22 / 24	35
Year-round population can grow considerably without much problem.	15 / 16	24 / 17	23 / 18	24
MV needs more resort, tourist-oriented, active recreational facilities	17 / 13	15 / 6	18 / 6	29
Martha's Vineyard should make every effort to attract more visitors.	15 / 8	8 / 5	13 / 8	30
Relax controls over the quantity/quality of development.	14 / 6	9 / 4	11 / 5	12
Make stricter controls over the quantity/quality of development.	58 / 64	56 / 74	40 / 65	43
Island road system should be expanded to handle increased traffic.	15 / 24	24 / 17	26 / 14	24
Cars on summer ferries should continue to be limited to 1995 levels.	35 / 49	34 / 52	13 / 49	38
Run more ferries in the summer.	na / 29	na / 26	na / 29	na
Need traffic lights at certain intersections	na / 40	na / 34	na / 49	na
Fund elementary & middle schools on an Island-wide basis.	na / 55	na / 44	na / 38	na
Affordable housing should be funded on an Island-wide basis.	na / 68	na / 65	na / 44	na
Install wireless communication towers up-Island, if necessary.	na / 41	na / 37	na / 18	na
Increase housing density to allow creation of more affordable housing.	na / 56	na / 33	na / 35	na

* This question was ambiguously worded in the Ferry Survey and the results were set aside. (It asked about "responsible new development", thereby lumping together those who favored more development provided it was responsible, and those who opposed more development but supported efforts to make it more responsible).



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