SEASONAL POPULATION STUDY FOR NORTHWEST LOWER MICHIGAN

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Networks Northwest

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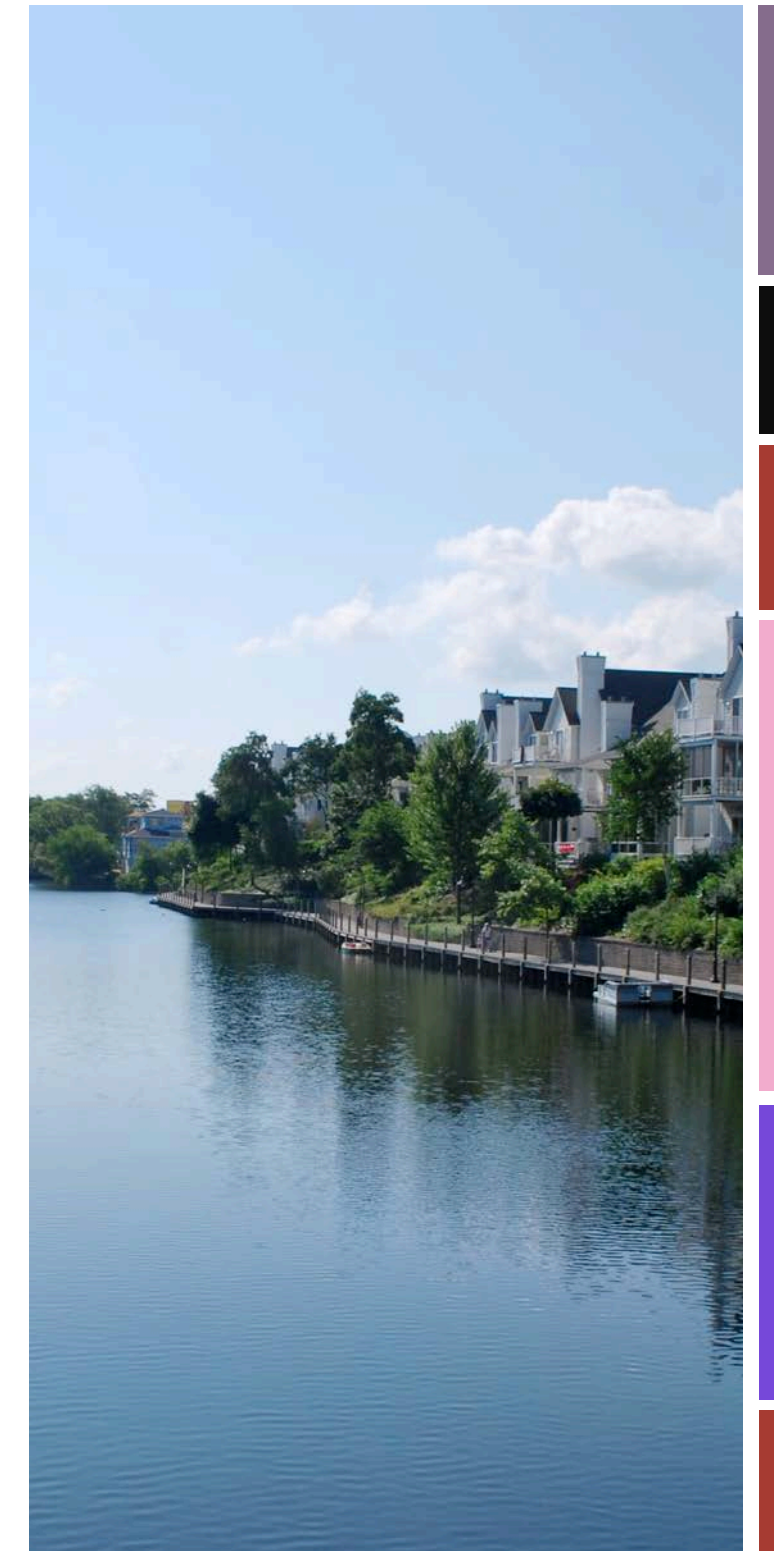
Glossary

American Community Survey. Annual statistical survey distributed by the United States Census Bureau

Bureau of Labor Statistics. A division of the United States Department of Labor and provides labor economic and statistics for the United States

Decennial Census. Complete count of the United States population, taken every ten years

Off-Season. Generally, the period of the year with a depressed seasonal population, ranging from October through April

On-Season. Generally, the period of the year with a substantial seasonal population, ranging from May through September

Seasonal Housing Unit. Those intended for occupancy during certain seasons of the year

United States Census Bureau. The Federal Agency in charge of producing data about the United States population and economy

AlltheRooms – Data Dictionary

Max Listings. Maximum number of listings available within the reporting period

Average Listings. Average number of available listings within the reporting period

Available Nights. Amount of listing-nights that are available to be booked

Available Room Nights. Maximum number of room-nights that is available to be booked within the reporting period. Sum of bedrooms per available listing

Nights Booked. Total number of guest occupied listing-nights, can also be defined as nights-stayed

Room Nights Booked. Total number of room-nights booked within the reporting period. Sum of bedrooms per booked listing

Occupancy Rate. Occupancy for the percentage of listings that are blocked, percentage of available nights that have been booked

Introduction

Population counts are valuable figures for several reasons including adequate public services provision, infrastructure planning, and funding allocation. However, in regions that have substantial population fluctuations throughout the year, estimating the true size of the population is difficult. Common population figures derived from the United States Census Bureau do not accurately detail the size of seasonal populations because they reflect where people live, not where they own second homes or where they vacation. In Northwest Michigan, the tourist season that generally runs from Memorial Day to Labor Day drives the seasonal population change. The tourism industry represents a substantial portion of the regional economy; therefore, understanding the true scale of seasonal population change is critical for the region.

Northwest Michigan, as defined in this report, is the 10-county region under the jurisdiction of Networks Northwest. Antrim, Benzie, Charlevoix, Emmet, Grand Traverse, Kalkaska, Leelanau, Manistee, Missaukee, and Wexford counties comprise the region and include the major population centers of Manistee, Cadillac, Traverse City, Charlevoix, Petoskey, and Harbor Springs.

In 2014, Networks Northwest, with assistance from the Michigan State University Land Policy Institute, published the first comprehensive analysis of the region's seasonal population. The study reported on the seasonal population in the calendar year 2012. This 2022 report intends to update and expand upon the figures from the original report including:

- Estimating the number of permanent residents;

- Estimating the number of part-time residents (second-home owners); and

- Estimating the number of overnight visitors in accommodation businesses.

The emergence of new trends in seasonal mobility, including the rise of short-term rentals (STRs), requires revising the initial methodology to better capture the current realities of seasonal population change. This 2022 report will also include:

- Estimating the number of overnight visitors in short-term rentals; and

- Estimating the seasonal workforce.

While this report uses similar methodology to the previous analysis, it is not intended to be used as a comparison or be used to identify overall trends in seasonal populations. The differing methodologies between the 2014 report and this edition render any comparisons inaccurate.

Methodology

Permanent Residents

The estimate of permanent residents was sourced from the 2020 decennial census. The 2020 decennial census is the most accurate source of population data in the country because it is a complete count of the entire United States population. Because the census occurs at the household level, it provides an excellent count of exactly how many people live in each community. The population estimate for the region is a total of the estimates for each community. Since the number of permanent residents does not change during the year, the number of permanent residents for each month is the same. In reality, people move and leave their permanent places of residence, so the number of permanent residents is likely to fluctuate marginally on a monthly basis. For the purposes of this study, this marginal fluctuation is not to the degree that warrants a revision to the 2020 decennial census estimates.

Part-Time Residents

Part-time residents are defined as people who own second homes in the region. Therefore, the number of seasonal homes in the region was the basis for estimating the part-time resident population. The United States Census Bureau records the number of seasonal homes in the American Community Survey. The U.S. Census Bureau defines seasonal homes as "housing units [that are] intended for occupancy only during certain seasons of the year and are found primarily in resort areas."[1] The number of seasonal homes was sourced from the 2020 American Community Survey 5-year estimates.

To estimate the number of seasonal homes occupied each month, the occupancy figures from the Stynes, Zheng, and Stewart 1997 study titled "Seasonal Homes and Natural Resources: Patterns of Use and Impact in Michigan" were used.[2] This report created the occupancy figures from a survey of seasonal homes in the state, and it contains the most recent figures for occupancy of seasonal homes in Michigan (Table 1). The same occupancy figures were used in the 2014 report; therefore the methodology for estimating the part-time population remained consistent to the 2014 study.

The average household size from the 1997 survey was 3.3; therefore, the total number of occupied homes each month was multiplied by 3.3 to estimate the number of part-time residents for each month. Household size has likely changed since the original survey, but in the absence of more recent data, the original 1997 figure was the only option. One challenge of this methodology is that if a person owns two homes in the region, they may be counted twice, once as a permanent resident and then again as a part-time resident. Removing this error would require analyzing property level ownership data to determine how many seasonal homes are owned by someone inside the region.

[1] United States Census Bureau, Definitions and Explanations, https://www.census.gov/housing/hvs/definitions.pdf

[2] Stynes, Zheng, Stewart, "Seasonal Homes and Natural Resources: Patterns of Use and Impact in Michigan", Michigan State University – Department of Park Recreation and Tourism Resources, https://www.fs.usda.gov/treesearch/pubs/10258

Table 1. Seasonal Home Occupancy in Michigan

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Antrim County	8%	8%	12%	12%	12%	64%	64%	64%	18%	18%	18%	18%
Benzie County	8%	8%	12%	12%	12%	64%	64%	64%	18%	18%	18%	18%
Charlevoix County	8%	8%	12%	12%	12%	64%	64%	64%	18%	18%	18%	18%
Emmet County	8%	8%	12%	12%	12%	64%	64%	64%	18%	18%	18%	18%
Grand Traverse County	8%	8%	12%	12%	12%	64%	64%	64%	18%	18%	18%	18%
Kalkaska County	9%	9%	15%	15%	15%	47%	47%	47%	18%	18%	18%	9%
Leelanau County	9%	9%	12%	12%	12%	69%	69%	69%	17%	17%	17%	9%
Manistee County	7%	7%	13%	13%	13%	59%	59%	59%	18%	18%	18%	7%
Missaukee County	9%	9%	15%	15%	15%	47%	47%	47%	18%	18%	18%	9%
Wexford County	9%	9%	15%	15%	15%	47%	47%	47%	18%	18%	18%	9%

Source: Seasonal Homes and Natural Resources: Patterns of Use and Impact in Michigan

Overnight Visitors

Transient populations are some of the most challenging to count because they are not easily recorded with surveys and census counts. Therefore, lodging facilities were surveyed to get an accurate estimate of overnight visitors. In 2014, the methodology to estimate the number of overnight visitors used a combination of surveys and travel market research data. However, the travel market research data had limited coverage for the region so was not used in this analysis. Additionally, short-term rentals (STRs) are much more common now than in 2014, and they represent a significant portion of the lodging opportunities in the region. This methodology separates overnight visitors into two categories: those who stay at traditional accommodation businesses (hotels, motels, bed & breakfasts, campgrounds, etc.) and those who stay in STRs.

Overnight Visitors - Accommodation Businesses

A shortcoming of the previous study was the limited coverage of the travel market research data. To avoid these limitations, this methodology relied solely on surveys. A list of accommodation businesses was sourced from the Pure Michigan website and formed the survey pool. Each accommodation business was mailed a link to an online survey, only 6 surveys were completed online. If an accommodation had not completed the survey within 10 days, it received the survey over the phone. Roughly 15% of listed business had a phone number that was disconnected or not valid. Of the valid phone numbers, 31% participated in the phone survey. The survey asked how many rooms/campsites/cabins each establishment operated, total occupancy, and occupancy rates for each month of the year. These figures were then used to calculate the number of people staying in each establishment each month of the year. A copy of the survey is in the appendix.

For businesses that did not participate in either the online or phone survey, information on total occupancy was sourced from their webpage and county-wide monthly occupancy averages were applied to determine their monthly occupancy. Businesses that did not respond to the survey or have the required information on their webpage are not represented in the figures, an estimated 50% of accommodation businesses are not represented in the data.

To estimate the number of occupants in accommodation businesses each month, the monthly occupancy rate for each business was applied to the total occupancy of that business. This figure was then multiplied by the number of days in the month to generate the total overnight visitors for each business. The figures were then totaled for each county. However, this methodology assumes that each visitor is only staying one night. In order to correct this assumption, the total number of days in each month was divided by 3.1, the average length of stay in Northwest Michigan according to the 2019 Overnight Visitation Report from Pure Michigan.[3] This correction converts the number of days in each month to the number of visits in each month for each establishment.

Overnight Visitors - Short-Term Rentals

The rise of short-term rentals (STRs) has significantly changed the accommodation landscape. Historically, most accommodation businesses in northwest Michigan were located in or near population centers with a few scattered establishments in the rural areas of the region. As Airbnb, VRBO, and other STR-hosting websites gained popularity, homes all over the region became potential lodging facilities. STRs were not included in the 2014 report but given their prevalence today, they are a necessary addition.

To estimate the number of people staying in STRs, data was sourced from AlltheRooms, a STR data provider. AlltheRooms gathers data from Airbnb and VRBO, two of the most popular STR hosting websites. For each county in the region, AlltheRooms provided the max number of STR listings, average listings, available nights, available room nights, nights booked, room nights booked, and occupancy rate for a 12-month period beginning May 1, 2021. To calculate the number of people staying in STRs in each month, the total room nights booked was multiplied by two under the assumption that at most, two people are staying in each room which is the maximum occupancy per bedroom according to Airbnb policy. However, like the accommodation business methodology, this calculation assumes that the length of stay is one night. A similar correction was applied to this equation by dividing the number of room nights booked by 3.81, the average length of a STR stay in Michigan, according to AlltheRooms. A full description of the data fields provided by AlltheRooms is in the glossary.

[3] Pure Michigan, "Travel USA Visitor Profile – Region 2: Northwest Region Overnight Visitation 2019", https://medc.app.box.com/s/s0fysmcetgnrks1fwhe7tji08quysod2

Seasonal Workforce

In most seasonal communities, the local workforce fluctuates in a similar fashion to the population. The on season brings more economic opportunities and demand for goods and services, so local businesses hire more staff to meet the demand.

The United States Bureau of Labor Statistics (BLS) records monthly employment for each county in the United States. This monthly data was used as the base for estimating the seasonal workforce for each county in the study area.

The BLS county data is not seasonally adjusted, meaning it is the raw count of how many people are employed for any given month (purple line in Figure 1). To calculate the number of seasonal employees, the number of non-seasonal employees needs to be subtracted from the original data set. To calculate the number of non-seasonal employees a second data set was produced by using the Census' X-13 ARIMA-SEATS software model. The X-13 ARIMA-SEATS model is used by the Census to transform non-seasonally adjusted data to seasonally adjusted data. The seasonally adjusted data shows overall trends in employment change, ignoring the fluctuations in seasonality (red line in Figure 1). Commonly reported information on the overall economy like "The United States added 4,000 jobs this quarter" is seasonally adjusted data. However, because the X-13 ARIMA-SEATS model includes the summer months, the months with the highest number of seasonal employees, it is not an exact calculation for only non-seasonal employees. Therefore, to calculate only the number of non-seasonal employees, an adjustment rate was applied to the model output.

The adjustment rate was the average range between the model output and the total employment during the months of October though April. While there are some seasonal employees during the winter, it can be assumed that the months of October through April have the lowest number of seasonal employees. Therefore, the difference between the model output (gray line) and non-seasonally adjusted employment numbers (blue line) during these months represents the number of seasonal employees included in the model output.

The number of seasonal employees was calculated by subtracting the adjustment rate from the model output (black line in Figure 1) and then subtracting the non-seasonal employee data set (black line) from the original non-seasonally adjusted data set (purple line). Employment data for the 12-month period beginning June 2021 was used to calculate the monthly seasonal employees reported in this report, although employment data from 1990-present was used to feed the seasonal adjustment model. This process was repeated for each county in the region. It is important to note that employment in several counties in the study has yet to return to pre-COVID-19 levels.
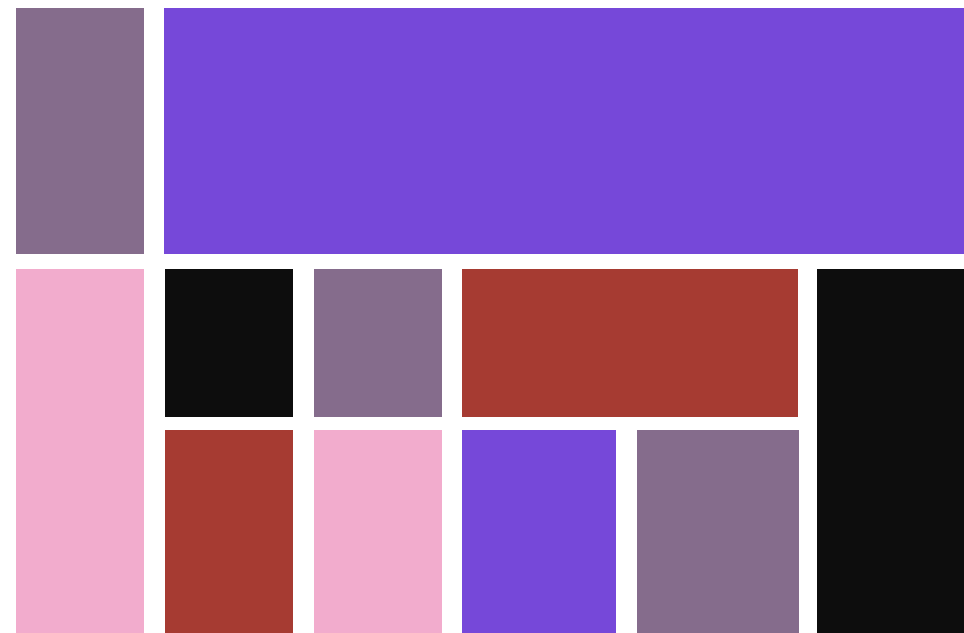
Figure 1. Employment in Emmet County
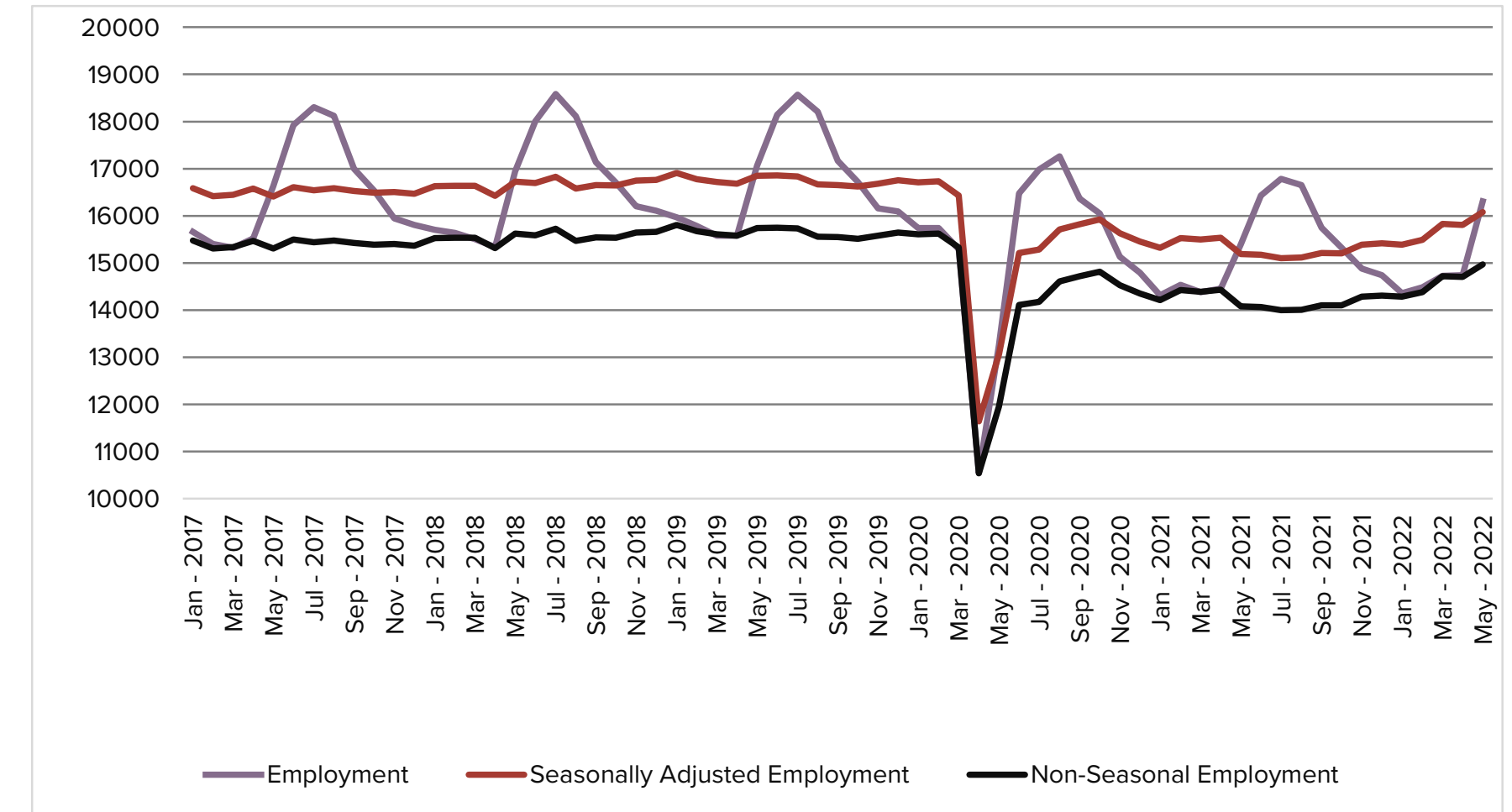
Northwest Michigan Region

The population of Northwest Michigan is extremely seasonal as it rises and falls by 78% in the summer. The increase of roughly 295,000 people to the region in the summer is driven predominately by overnight visitors. In the peak month of July, overnight visitors account for 40% of the region's population. Of the 270,000 overnight visitors in the month of July, roughly 82% of them stay at traditional accommodation businesses like hotels, motels, and campgrounds. The remaining overnight visitors stay in short-term rentals (STRs). On a monthly basis, the region averages roughly 4,300 STR listings and roughly 213,000 room nights available.

A smaller portion of the population are part-time residents. In the month of February, the number of part-time residents in the region is at its lowest point, only 13,120 individuals. The regional part-time population in the span of four months increases by 636% to 96,566 individuals in June.

As a heavily seasonal region, employment levels fluctuate within the region as well. In the month of July, there are an estimated 15,898 seasonal employees in the region, representing 10.4% of the total labor force. However, the seasonal changes in population and employment vary by county and are discussed in more detail on each page of the following section.

Figure 2: Population Breakdown, Northwest Michigan Region
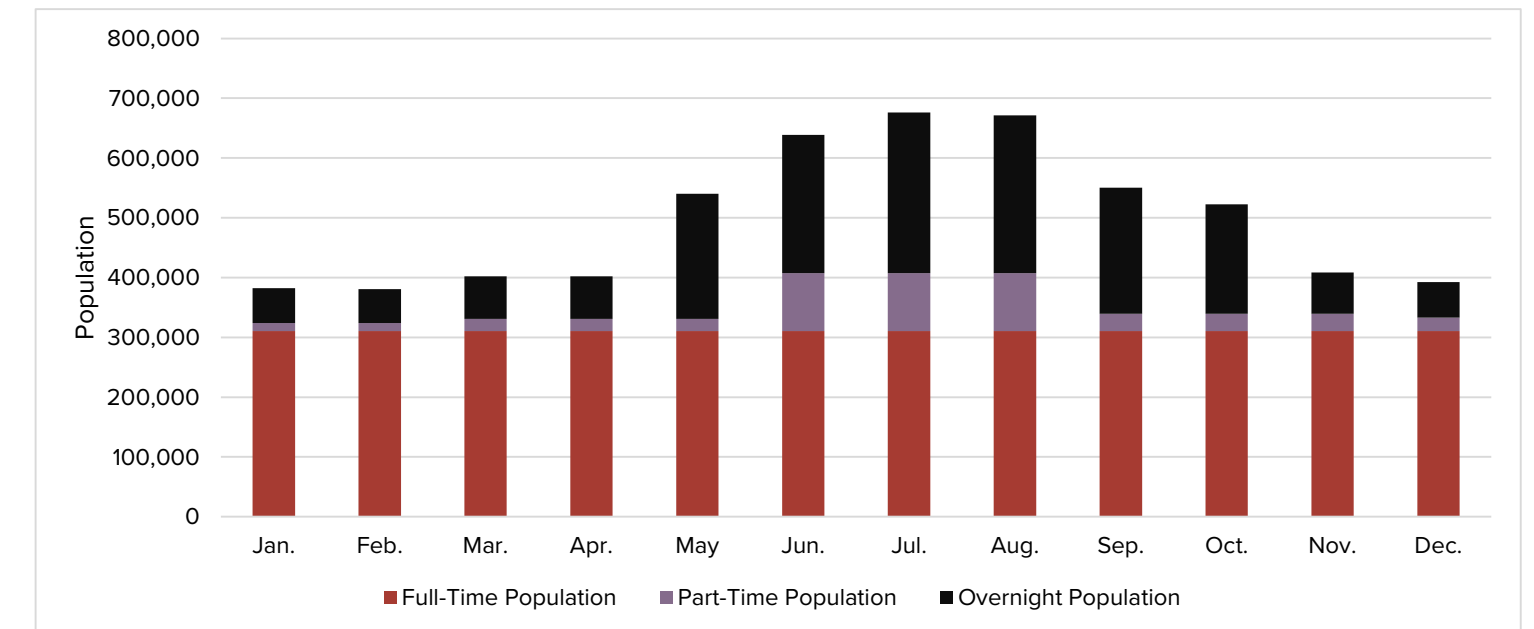
Table 2. Seasonality Summary

	Minimum Population	Maximum Population	Change	Percent Change
Antrim County	30,860 – Mar	59,352 – Jul	28,492	92%
Benzie County	27,535 – Feb	60,904 – Jul	33,370	121%
Charlevoix County	34,603 – Apr	59,533 – Jul	24,930	72%
Emmet County	43,666 – Feb	89,628 – Jul	45,961	105%
Grand Traverse County	109,408 – Feb	161,088 – Jul	51,680	47%
Kalkaska County	21,601 – Dec	42,795 – Jul	21,194	98%
Leelanau County	26,630 – Jan	60,094 – Jul	33,464	126%
Manistee County	28,218 – Jan	54,924 – Aug	26,706	95%
Missaukee County	15,926 – Jan	29,894 – Jul	13,969	88%
Wexford County	40,879 – Feb	58,168 – Jul	17,290	42%
Region	380,708 – Feb	676,052 – Jul	295,344	78%

Table 3. Seasonal Population - Networks Northwest Region

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Full-Time Population	310,802	310,802	310,802	310,802	310,802	310,802	310,802	310,802	310,802	310,802	310,802	310,802	310,802
Part-Time Population	13,120	13,120	20,329	20,329	20,329	96,566	96,566	96,566	28,574	28,574	28,574	22,410	13,120
Overnight Population	58,511	56,786	58,575	71,136	208,810	231,331	268,684	264,215	210,750	182,910	69,002	59,321	145,003
Accommodations	36,097	32,756	37,883	51,362	174,524	185,910	217,672	211,950	168,080	142,683	48,735	36,623	112,023
Short-term Rentals	22,415	24,030	20,692	19,774	34,287	45,421	51,012	52,265	42,670	40,227	20,267	22,698	32,980
Total	382,433	380,708	389,706	402,267	539,941	638,699	676,052	671,583	550,126	522,286	408,378	392,532	496,226

Table 4. Short-term Rental Details - Networks Northwest Region

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Max Listings	4,474	4,520	4,617	4,748	3,903	4,057	4,202	4,344	4,433	4,378	4,314	4,390	4,365
Average Listings	4,431	4,472	4,541	4,646	3,758	3,971	4,127	4,236	4,360	4,322	4,243	4,286	4,283
Available Nights	100,217	89,166	100,728	103,436	87,387	80,628	74,899	81,206	94,757	102,174	96,918	96,906	92,369
Available Room Nights	232,113	206,577	236,089	242,318	203,503	182,024	165,868	181,309	215,692	236,388	228,162	226,227	213,023
Nights Booked	18,832	20,292	17,612	17,543	29,653	39,866	47,049	46,933	38,953	36,455	17,678	18,839	29,142
Room Nights Booked	42,700	45,778	39,418	37,669	65,316	86,527	97,178	99,565	81,286	76,632	38,608	43,239	62,826
Occupancy Rate	18.9%	23.0%	17.5%	16.9%	33.9%	49.4%	63.1%	57.7%	40.9%	35.5%	18.2%	19.6%	32.9%

Table 5. Seasonal Workforce - Networks Northwest Region

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Labor Force	139,368	139,870	141,761	141,859	150,736	150,501	152,588	150,619	144,680	142,419	140,545	139,952	144,575
Employed	130,967	131,264	134,447	134,869	144,086	141,311	143,606	143,236	138,388	136,811	134,973	133,184	137,262
Non-Seasonal	130,613	130,843	133,378	133,145	135,133	127,367	127,708	128,507	129,385	129,696	130,616	130,790	130,598
Seasonal	354	421	1,069	1,724	8,953	13,944	15,898	14,729	9,003	7,115	4,357	2,394	6,663
Percent of Labor Force Seasonal	0.3%	0.3%	0.8%	1.2%	5.9%	9.3%	10.4%	9.8%	6.2%	5.0%	3.1%	1.7%	6.4%

Antrim County

In the off-season, Antrim County's permanent (year-round) population of 23,431 individuals accounts for over 70% of the total population. However, in the summer months, Antrim County's population nears 60,000 people, driven by the influx of second homeowners and overnight visitors. The population staying in accommodation businesses tops 14,000 people in the months of June and July, representing 6.6% of the total regional visitors staying in accommodation businesses. In the summer, the majority of overnight visitors stay in traditional accommodation businesses (hotels, motels, campgrounds), but in the off-season, STRs hosts more individuals, likely because many accommodation businesses close in the off-season. On average, Antrim County's workforce is 6.4% seasonal, but exceeds 15% in the month of June, roughly 1,700 individuals. Housing for seasonal workers is a continuing challenge for many workers and local businesses. A lack of seasonal housing limits the pool of workers to those who live in the area or are lucky enough to find the scarce seasonal units. Recently, local businesses have taken on the responsibility of securing seasonal housing. For example, Short's Brewery, a large employer in the Village of Bellaire, bought a motel to use as a temporary transitional housing for their non-local seasonal workers.

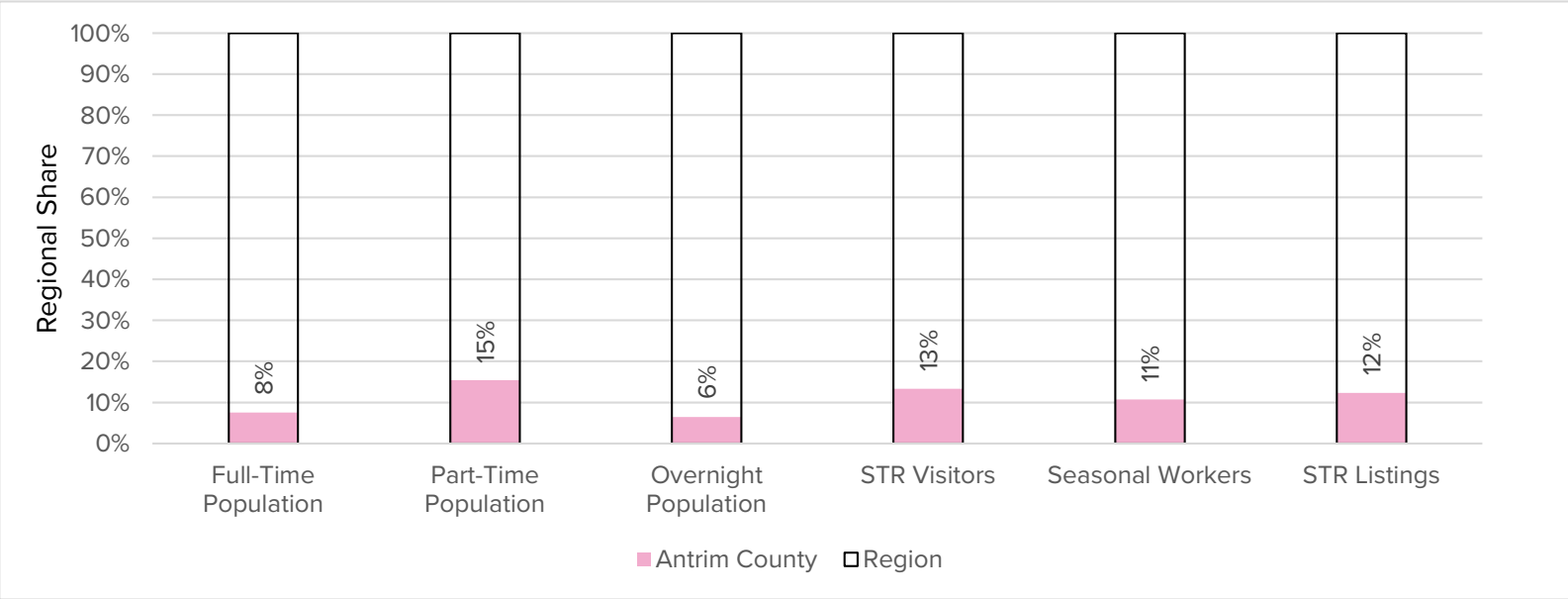Figure 3. Regional Share, Antrim County

Table A-1. Seasonal Population - Antrim County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Full-Time Population	23,431	23,431	23,431	23,431	23,431	23,431	23,431	23,431	23,431	23,431	23,431	23,431	23,431
Part-Time Population	1,861	1,861	2,792	2,792	2,792	14,892	14,892	14,892	4,188	4,188	4,188	4,188	6,127
Overnight Population	5,698	5,811	4,637	5,478	16,457	19,123	21,029	20,914	15,843	10,995	5,777	5,900	11,472
Accommodations	2,420	2,201	2,131	3,360	12,011	13,112	14,354	14,112	10,525	5,937	3,179	2,659	7,167
Short-term Rentals	3,278	3,610	2,506	2,118	4,446	6,010	6,676	6,802	5,318	5,058	2,598	3,241	4,305
Total	30,991	31,104	30,860	31,701	42,680	57,446	59,352	59,237	43,462	38,615	33,397	33,519	41,030

Figure 4. Population Breakdown, Antrim County
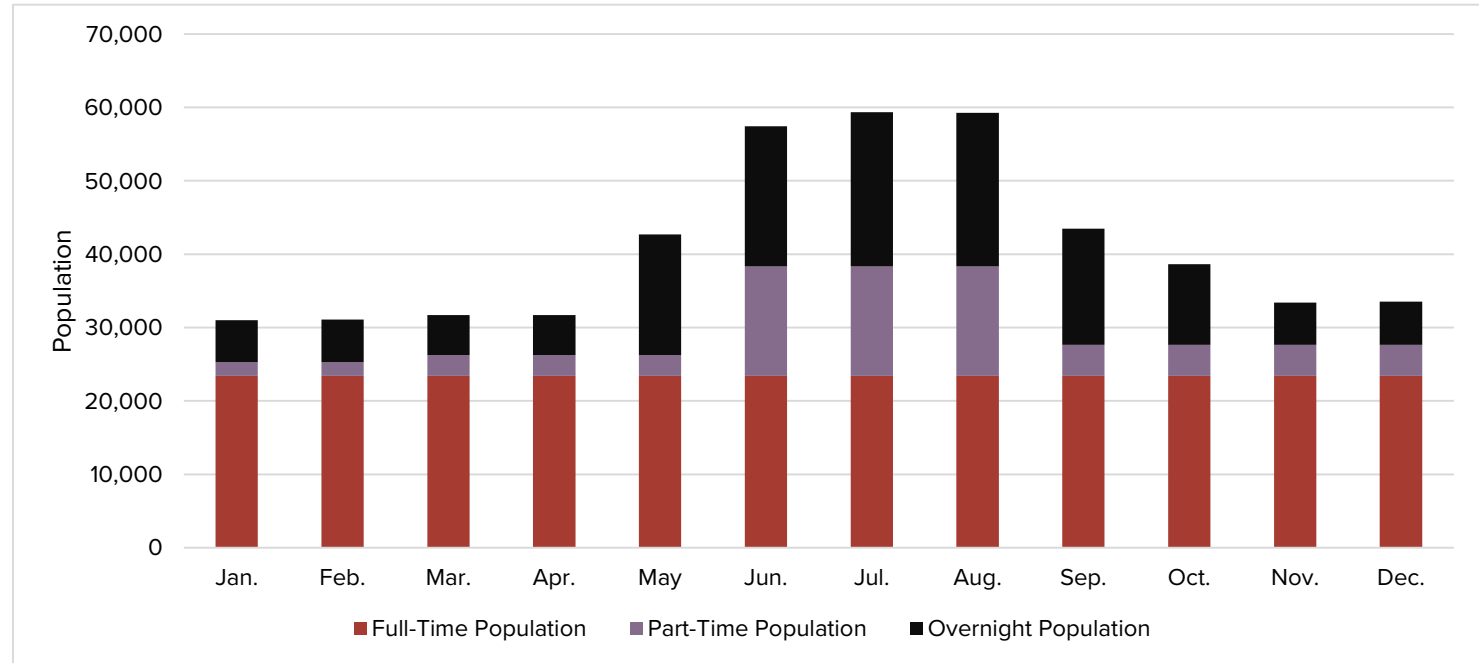
Table A-2. Short-term Rental Details - Antrim County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Max Listings	526	526	531	544	490	498	519	530	540	531	516	522	523
Average Listings	521	523	527	537	473	492	511	522	533	523	511	512	515
Available Nights	12,728	11,301	13,071	13,207	11,769	10,549	9,744	10,423	12,662	13,520	12,707	12,259	11,995
Available Room Nights	30,461	27,188	31,377	31,983	27,731	24,376	22,005	23,457	29,382	32,223	30,879	29,545	28,384
Nights Booked	2,620	2,879	2,012	1,656	3,511	4,925	5,911	5,869	4,645	4,286	2,057	2,477	3,571
Room Nights Booked	6,245	6,877	4,774	4,034	8,469	11,450	12,717	12,957	10,130	9,636	4,949	6,174	8,201
Occupancy Rate	20.6%	25.5%	15.4%	12.5%	29.8%	46.7%	60.7%	56.3%	36.7%	31.7%	16.2%	20.2%	31.0%

Table A-3. Seasonal Workforce - Antrim County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Labor Force	9,361	9,414	9,505	9,422	10,246	10,504	10,973	10,650	10,061	9,738	9,383	9,303	9,880
Employed	8,644	8,671	8,878	8,799	9,678	9,741	10,231	10,060	9,555	9,283	8,922	8,747	9,267
Non-Seasonal	8,539	8,514	8,712	8,670	8,870	8,402	8,523	8,584	8,621	8,631	8,633	8,592	8,608
Seasonal	105	157	166	129	808	1,339	1,708	1,476	934	652	289	155	660
Percent of Labor Force Seasonal	1.1%	1.7%	1.7%	1.4%	7.9%	12.7%	15.6%	13.9%	9.3%	6.7%	3.1%	1.7%	6.4%

Benzie County

With a permanent population of 17,970, Benzie County is one of the smallest counties in the region in population However, in the month of July, when accounting for the second-home owners and overnight visitors, Benzie County becomes the third-most populous county in the region. The substantial increase in population is primarily driven by visitors staying in accommodation businesses like campgrounds, hotels, and motels. Those saying in STRs also contribute to the boom in overnight visitors, but they only account for roughly 14% of the total overnight visitors in the month of July. For half the year, the overnight visitor population is larger than the permanent population and second-home population combined. Benzie County's seasonal labor force never accounts for more than 10% of the labor force at any point in the year and is aligned with the regional averages.

Figure 5. Regional Share, Benzie County
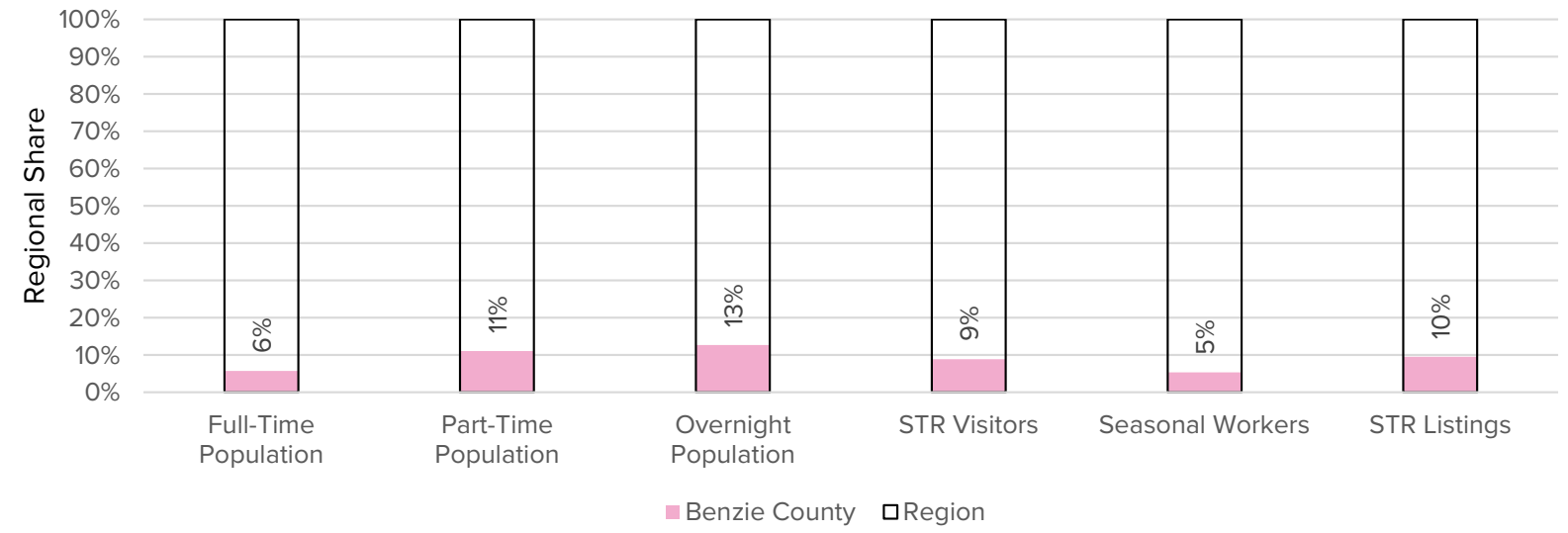

	Full-Time Population	Part-Time Population	Overnight Population	STR Visitors	Seasonal Workers	STR Listings
Benzie County	6%	11%	13%	9%	5%	10%

Benzie County ■ Region □

Table B-1. Seasonal Population - Benzie County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Full-Time Population	17,970	17,970	17,970	17,970	17,970	17,970	17,970	17,970	17,970	17,970	17,970	17,970	17,970
Part-Time Population	1,338	1,338	2,008	2,008	2,008	10,708	10,708	10,708	3,012	3,012	3,012	3,012	4,406
Overnight Population	8,804	8,226	8,755	8,845	29,251	30,600	32,227	32,136	29,513	29,713	8,409	8,717	19,600
Accommodations	7,227	6,530	7,204	7,196	25,994	26,340	27,687	27,487	25,836	26,270	7,066	7,244	16,840
Short-term Rentals	1,577	1,696	1,551	1,649	3,256	4,259	4,539	4,648	3,677	3,443	1,344	1,473	2,759
Total	28,112	27,535	28,733	28,823	49,228	59,278	60,904	60,814	50,495	50,694	29,391	29,699	41,975

Figure 6. Population Breakdown, Benzie County
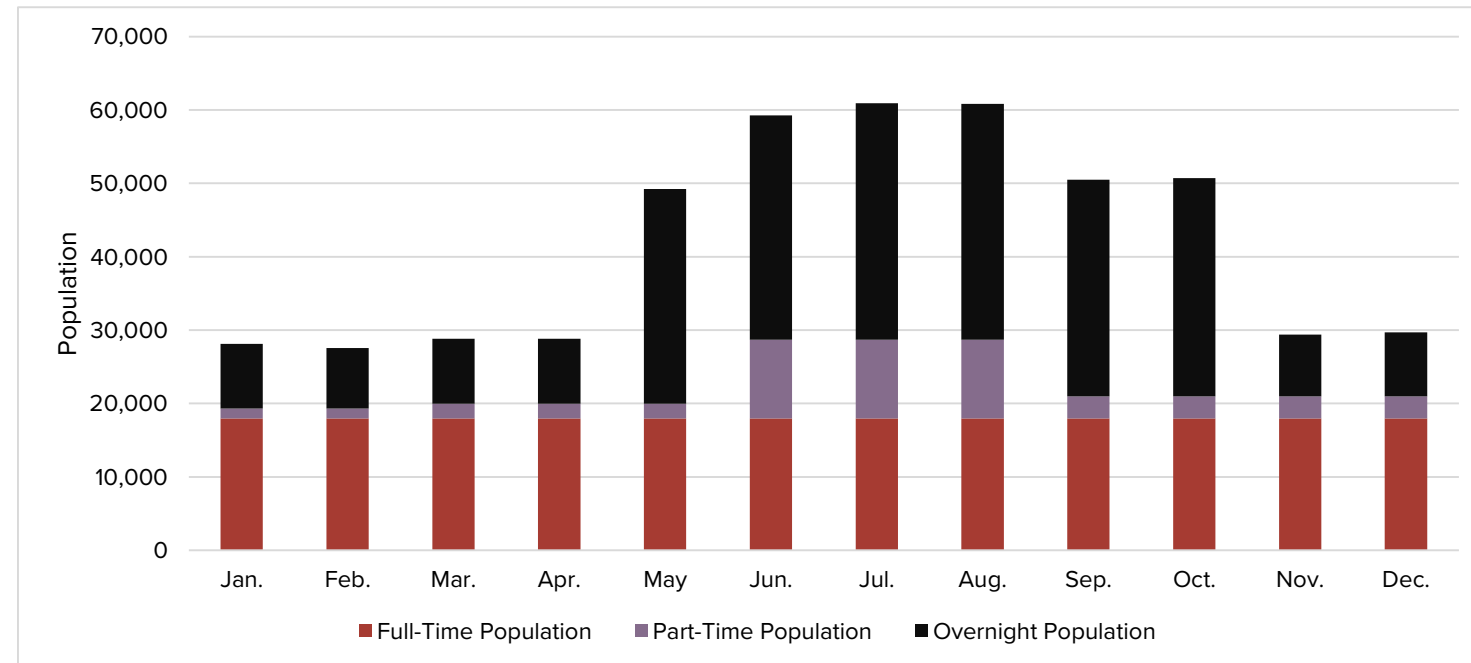
Table B-2. Short-term Rental Details - Benzie County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Max Listings	401	396	395	421	382	394	403	410	416	405	400	398	402
Average Listings	396	392	393	409	371	386	397	406	408	403	397	396	396
Available Nights	9,824	8,430	9,422	9,967	9,079	8,600	8,197	8,505	9,430	10,357	9,576	9,879	9,272
Available Room Nights	23,212	19,968	22,361	23,189	20,725	19,116	18,192	18,470	21,419	23,793	22,474	23,204	21,344
Nights Booked	1,263	1,344	1,185	1,352	2,771	3,647	4,213	4,210	3,291	2,944	1,057	1,174	2,371
Room Nights Booked	3,004	3,231	2,955	3,141	6,203	8,114	8,647	8,855	7,005	6,559	2,560	2,807	5,257
Occupancy Rate	12.9%	15.9%	12.6%	13.6%	30.5%	42.4%	51.4%	49.5%	34.9%	28.4%	11.0%	11.9%	26.3%

Table B-3. Seasonal Workforce - Benzie County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Labor Force	8,325	8,347	8,451	8,456	8,914	8,778	8,907	8,807	8,498	8,383	8,363	8,350	8,548
Employed	7,752	7,755	7,953	7,994	8,485	8,251	8,401	8,386	8,130	8,068	8,017	7,899	8,091
Non-Seasonal	7,752	7,755	7,885	7,871	7,969	7,512	7,545	7,598	7,648	7,666	7,730	7,747	7,723
Seasonal	0	0	68	123	516	739	856	788	482	402	287	152	368
Percent of Labor Force Seasonal	0.0%	0.0%	0.8%	1.5%	5.8%	8.4%	9.6%	9.0%	5.7%	4.8%	3.4%	1.8%	4.2%

Charlevoix County

Charlevoix County, along with Antrim, Benzie, and Emmet Counties, maintains a sizable population of overnight visitors year-round. This is likely driven by the winter recreation opportunities in each county, all of which have a winter resort. In the winter, the permanent population represents roughly 75% of the total population, and in the summer, the permanent population accounts for roughly 50% of the total population. Charlevoix County is also a hotspot for short-term rentals in the regional having the most listings in the month of June, behind Grand Traverse and Leelanau Counties. The STR listings in Charlevoix County account for 16% of the total listings in the region. Charlevoix's seasonal population is one of the largest in the region with roughly 2,000 seasonal workers in July, behind Grand Traverse and Emmet Counties.

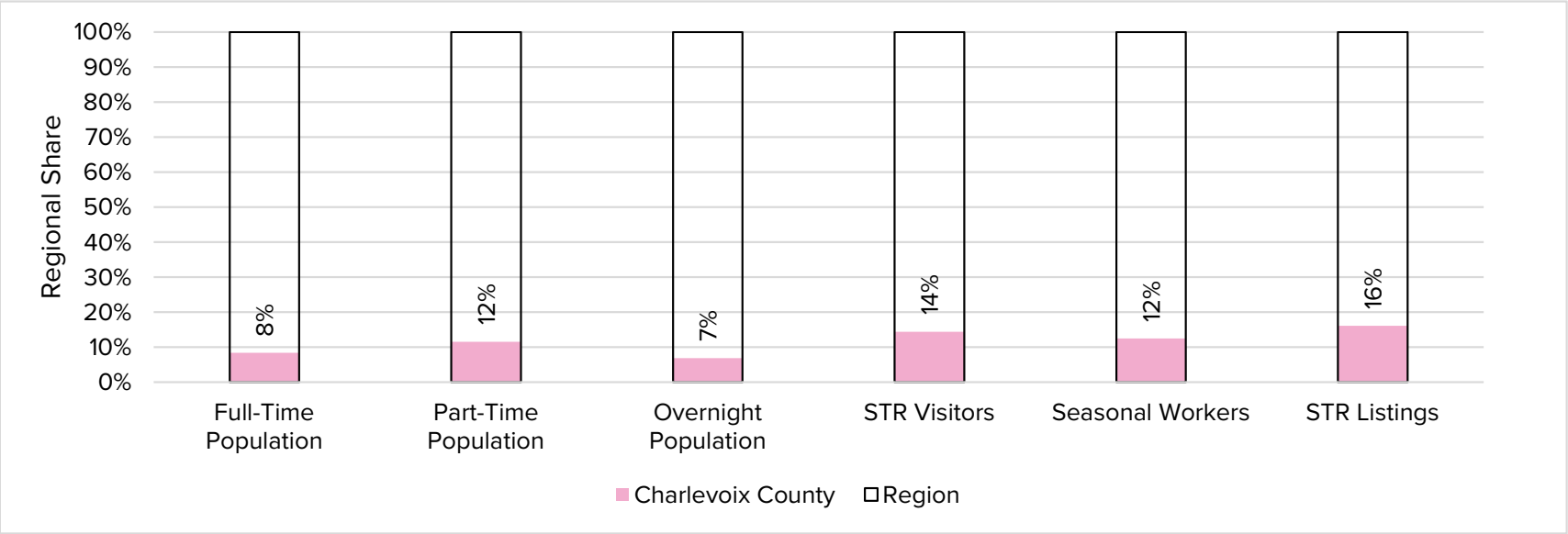Figure 7. Regional Share, Charlevoix County

Table C-1. Seasonal Population - Charlevoix County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Full-Time Population	26,054	26,054	26,054	26,054	26,054	26,054	26,054	26,054	26,054	26,054	26,054	26,054	26,054
Part-Time Population	1,391	1,391	2,086	2,086	2,086	11,126	11,126	11,126	3,129	3,129	3,129	3,129	4,578
Overnight Population	7,337	7,504	6,640	6,463	12,363	15,951	22,353	18,384	13,626	11,452	5,510	6,970	11,213
Accommodations	2,670	2,460	2,510	3,446	8,217	9,499	15,010	10,720	8,023	6,024	2,820	2,744	6,179
Short-term Rentals	4,667	5,045	4,130	3,017	4,146	6,452	7,342	7,664	5,603	5,428	2,690	4,225	5,034
Total	34,781	34,949	34,780	34,603	40,504	53,131	59,533	55,564	42,809	40,635	34,694	36,153	41,845

Figure 8. Population Breakdown, Charlevoix County
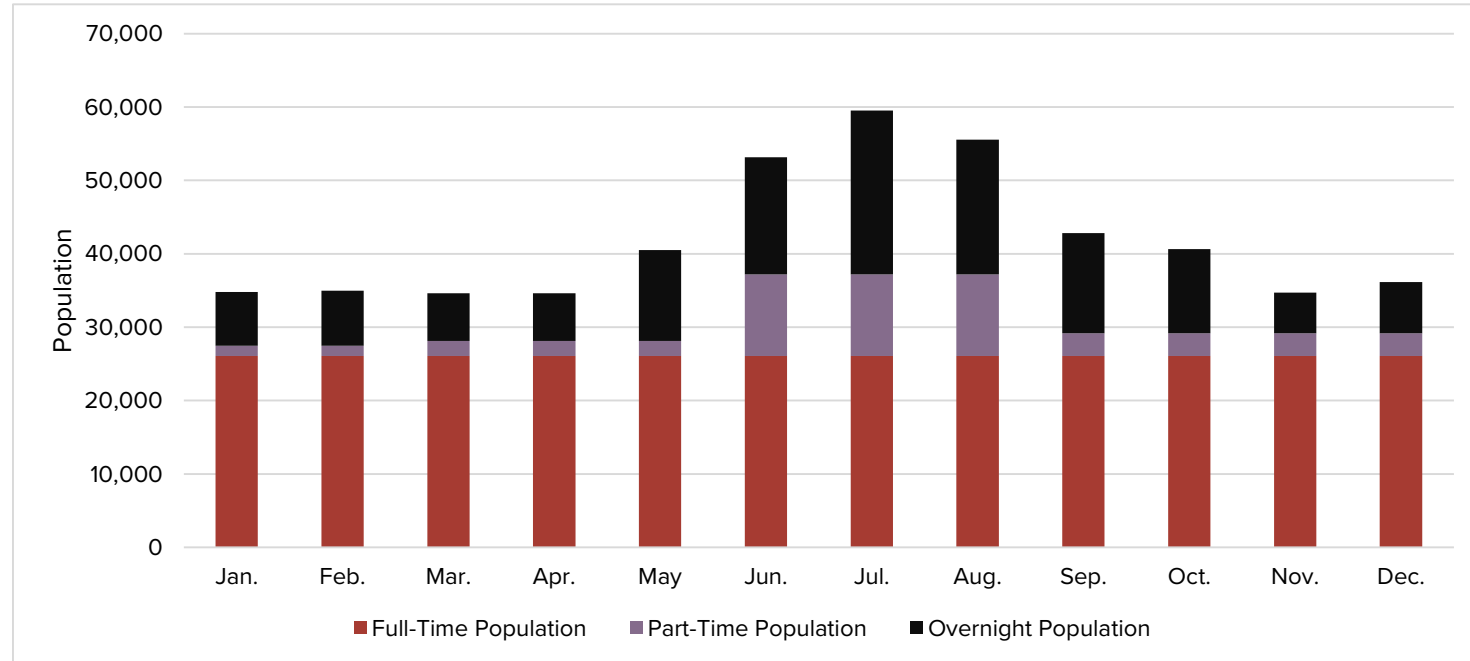
Table C-2. Short-term Rental Details - Charlevoix County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Max Listings	908	939	1,022	1,032	634	665	677	766	779	772	772	860	819
Average Listings	895	921	984	1,013	624	651	668	707	770	766	757	812	797
Available Nights	16,540	14,601	17,503	18,225	13,717	11,827	10,479	11,802	14,139	15,057	15,036	15,383	14,526
Available Room Nights	40,654	35,592	44,368	46,120	36,352	30,532	25,871	29,963	36,846	39,657	39,505	39,347	37,067
Nights Booked	3,587	3,987	3,290	2,730	3,202	4,982	5,908	6,033	4,502	4,309	2,181	3,265	3,998
Room Nights Booked	8,890	9,610	7,867	5,747	7,899	12,292	13,987	14,600	10,674	10,340	5,125	8,049	9,590
Occupancy Rate	21.7%	27.3%	18.8%	15.0%	23.3%	42.1%	56.4%	51.1%	31.8%	28.6%	14.5%	21.2%	29.3%

Table C-3. Seasonal Workforce - Charlevoix County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Labor Force	11,767	11,824	11,931	11,716	12,697	13,159	13,388	13,187	12,364	11,981	11,604	11,650	12,272
Employed	11,041	11,076	11,305	11,102	12,131	12,355	12,592	12,551	11,844	11,525	11,146	11,086	11,646
Non-Seasonal	10,893	10,933	11,171	11,100	11,283	10,636	10,609	10,675	10,766	10,814	10,869	10,894	10,887
Seasonal	148	143	134	2	848	1,719	1,983	1,876	1,078	711	277	192	759
Percent of Labor Force Seasonal	1.3%	1.2%	1.1%	0.0%	6.7%	13.1%	14.8%	14.2%	8.7%	5.9%	2.4%	1.6%	5.9%

Emmet County

Emmet County is the second-most seasonal county in the region, largely driven by an influx of overnight visitors in the months of May – October. In the summer, the permanent population of 34,112 individuals accounts for less than 40% of the total population compared to over 70% in the off-season. Over 17% of the regional accommodation visitors in the month of July stay in Emmet County. The seasonal workforce heavily mirrors the substantial monthly fluctuations in population. In the off-season, the seasonal workforce represents less than 4% of the total labor force, and in the on-season, seasonal workers are upwards of 15% of the total labor force. In the month of July, there are an estimated 2,789 seasonal workers in Emmet County, 18% of the region's seasonal workforce.

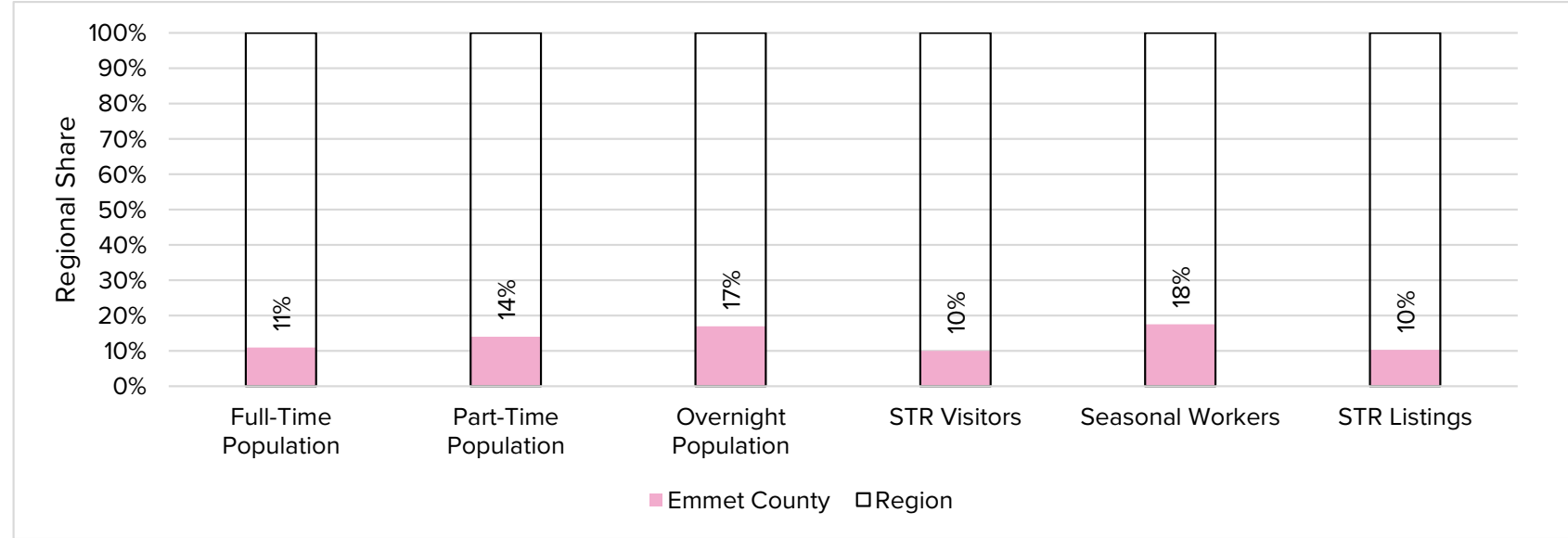Figure 9. Regional Share, Emmet County

Table D-1. Seasonal Population - Emmet County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Full-Time Population	34,112	34,112	34,112	34,112	34,112	34,112	34,112	34,112	34,112	34,112	34,112	34,112	34,112
Part-Time Population	1,688	1,688	2,532	2,532	2,532	13,504	13,504	13,504	3,798	3,798	3,798	3,798	5,556
Overnight Population	8,386	7,866	7,786	7,472	38,367	40,136	42,011	41,898	34,779	34,794	6,725	7,715	23,162
Accommodations	5,087	4,608	5,222	5,586	34,538	35,205	36,962	36,785	30,386	30,419	4,467	5,168	19,536
Short-term Rentals	3,299	3,258	2,564	1,887	3,829	4,931	5,049	5,113	4,393	4,376	2,259	2,548	3,625
Total	44,186	43,666	44,430	44,116	75,011	87,752	89,628	89,514	72,690	72,705	44,635	45,625	62,830

Figure 10. Population Breakdown, Emmet County
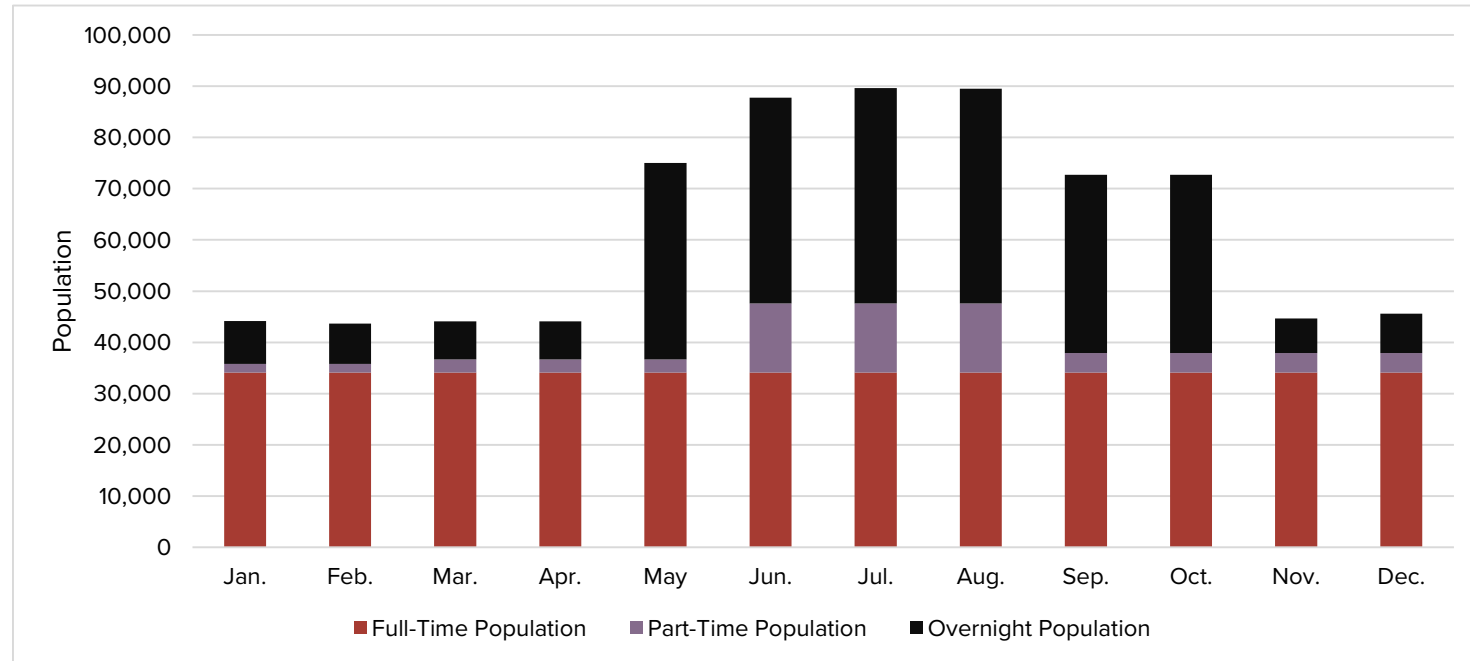
Table D-2. Short-term Rental Details - Emmet County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Max Listings	438	439	451	467	411	417	435	437	445	445	439	437	438
Average Listings	436	435	444	458	400	411	427	432	440	442	431	423	432
Available Nights	10,981	9,502	10,938	11,363	9,685	9,016	8,586	8,837	9,964	11,102	10,918	10,185	10,090
Available Room Nights	27,187	23,634	28,082	29,519	24,189	21,518	20,245	20,957	24,104	27,466	27,609	25,336	24,987
Nights Booked	2,569	2,532	1,938	1,635	3,167	4,280	4,802	4,699	3,935	3,940	1,897	2,141	3,128
Room Nights Booked	6,285	6,206	4,885	3,594	7,295	9,393	9,619	9,740	8,369	8,336	4,303	4,853	6,907
Occupancy Rate	23.4%	26.6%	17.7%	14.4%	32.7%	47.5%	55.9%	53.2%	39.5%	35.5%	17.4%	21.0%	32.1%

Table D-3. Seasonal Workforce - Emmet County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Labor Force	15,565	15,728	15,760	15,746	17,164	17,487	17,802	17,466	16,441	15,959	15,604	15,654	16,365
Employed	14,361	14,483	14,729	14,739	16,310	16,430	16,787	16,650	15,748	15,323	14,882	14,741	15,432
Non-Seasonal	14,283	14,384	14,722	14,702	14,971	14,067	13,998	14,008	14,104	14,099	14,282	14,310	14,327
Seasonal	78	99	7	37	1,339	2,363	2,789	2,642	1,644	1,224	600	431	1,104
Percent of Labor Force Seasonal	0.5%	0.6%	0.0%	0.2%	7.8%	13.5%	15.7%	15.1%	10.0%	7.7%	3.8%	2.8%	6.5%

Grand Traverse County

With a permanent population of 95,238 individuals and a peak population of roughly 161,000, Grand Traverse is the largest County in the region by population. A substantial portion of the county population is in the Traverse City area. Despite having the highest number of overnight visitors, compared to other counties in the region, the permanent population never dips far below 60% of the total population at any point. Grand Traverse County has one of the lowest counts of part-time residents indicating that seasonal home ownership is not as prevalent in Grand Traverse County. However, some of the seasonal homes may have been converted into one of the 1,000 STRs in the county. Roughly a quarter of all the STR listings in the region are in Grand Traverse County. The county also has the most seasonal workers, accounting for 30% of the region's seasonal workforce in the month of July. The mathematical formula used to estimate the seasonal workforce has some degree of error, which is why January and February are not included in this analysis.

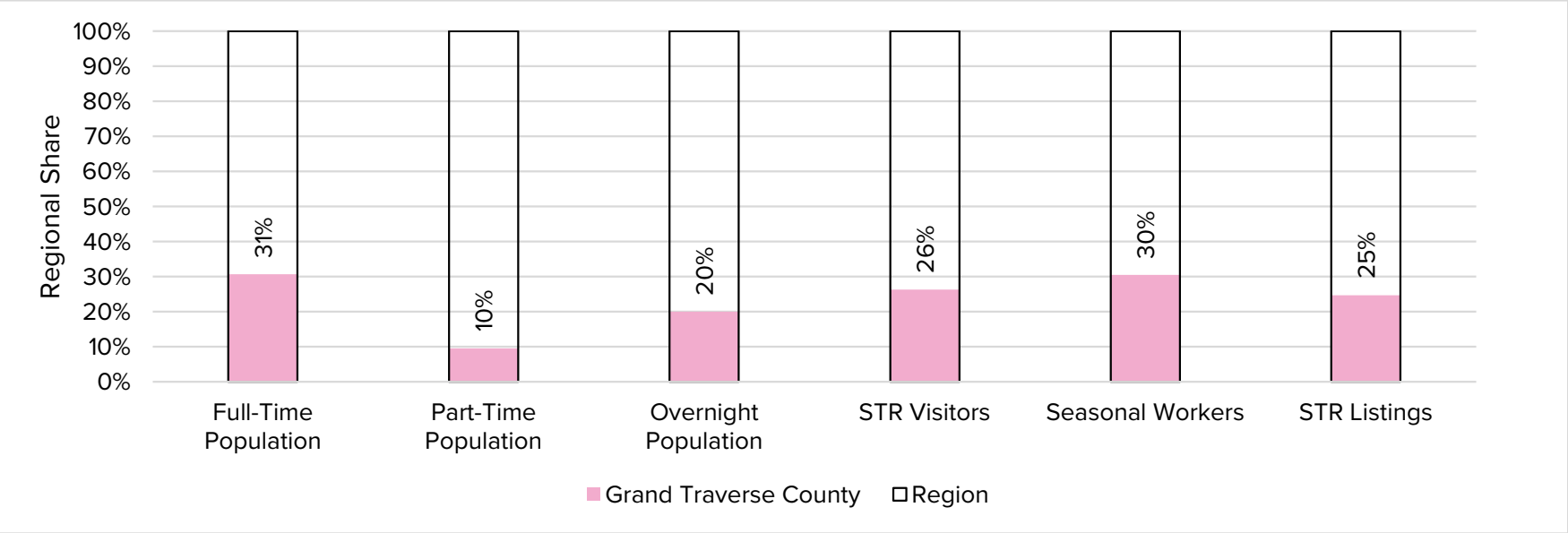Figure 11. Regional Share, Grand Traverse County

Table E-1. Seasonal Population - Grand Traverse County

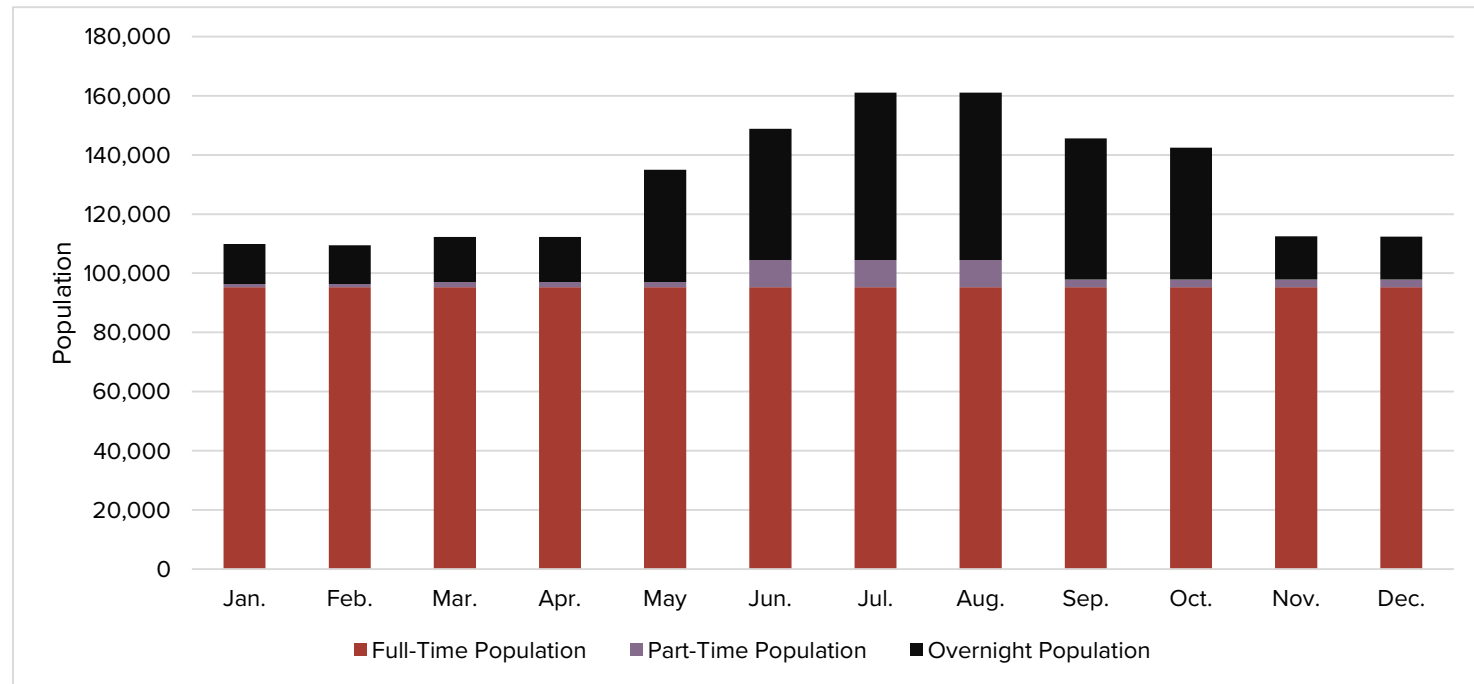|	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Full-Time Population	95,238	95,238	95,238	95,238	95,238	95,238	95,238	95,238	95,238	95,238	95,238	95,238	95,238
Part-Time Population	1,153	1,153	1,730	1,730	1,730	9,225	9,225	9,225	2,595	2,595	2,595	2,595	3,796
Overnight Population	13,543	13,017	13,648	15,315	37,973	44,344	56,565	56,625	47,742	44,562	14,644	14,587	31,047
Accommodations	8,245	7,503	8,171	9,560	28,878	32,944	43,509	43,199	36,273	33,957	8,784	8,866	22,491
Short-term Rentals	5,298	5,514	5,478	5,755	9,095	11,400	13,056	13,426	11,469	10,605	5,860	5,722	8,556
Total	109,934	109,408	110,616	112,283	134,941	148,807	161,028	161,088	145,575	142,394	112,477	112,420	130,081

Figure 12. Population Breakdown, Grand Traverse County

Table E-2. Short-term Rental Details - Grand Traverse County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Max Listings	1,067	1,071	1,054	1,106	954	1,002	1,035	1,036	1,078	1,079	1,088	1,086	1,055
Average Listings	1,060	1,065	1,042	1,079	903	978	1,022	1,029	1,059	1,065	1,075	1,072	1,037
Available Nights	25,720	23,004	24,919	25,537	21,733	20,730	19,449	21,108	24,071	25,883	25,576	25,711	23,620
Available Room Nights	49,991	44,864	48,115	49,285	42,217	39,471	36,545	40,387	46,552	50,751	49,771	49,620	45,631
Nights Booked	5,529	5,908	5,669	6,082	9,452	11,994	14,175	14,047	12,230	11,570	6,227	5,762	9,054
Room Nights Booked	10,092	10,504	10,435	10,963	17,326	21,717	24,872	25,577	21,849	20,202	11,164	10,900	16,300
Occupancy Rate	21.5%	25.7%	22.7%	23.8%	43.5%	57.9%	72.9%	66.5%	50.8%	44.7%	24.3%	22.4%	39.7%

Table E-3. Seasonal Workforce - Grand Traverse County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Labor Force	46,647	46,682	47,481	47,593	50,411	49,943	50,650	50,094	48,306	47,773	47,473	47,158	48,351
Employed	44,530	44,512	45,591	45,843	48,597	47,268	48,059	47,933	46,453	46,144	45,927	45,311	46,347
Non-Seasonal	44,530	44,512	45,184	45,095	45,678	43,038	43,219	43,524	43,821	43,923	44,302	44,405	44,269
Seasonal	x	x	407	748	2,919	4,230	4,840	4,409	2,632	2,221	1,625	906	2,078
Percent of Labor Force Seasonal	x	x	0.9%	1.6%	5.8%	8.5%	9.6%	8.8%	5.4%	4.6%	3.4%	1.9%	4.2%

Kalkaska County

With a total population of 42,795 individuals in the month of July, Kalkaska is one of the smallest counties in the region by population. The permanent population of 17,939 individuals accounts for roughly 80% of the total population in the off-seasonal and roughly 44% in the on-season. The seasonal rise in population is primarily driven by overnight visitors who predominantly stay in campgrounds and RV parks. There are very few STRs in Kalkaska County and only account for 2% of the regional listings in the month of July. The county averages about 100 listings a month. Kalkaska County also has a relatively small seasonal workforce, likely because there is only one community in the county (Village of Kalkaska) with a concentration of commercial activity. In July, there are an estimated 784 seasonal workers, accounting for only 5% of the region's seasonal workforce.

Figure 13. Regional Share, Kalkaska County
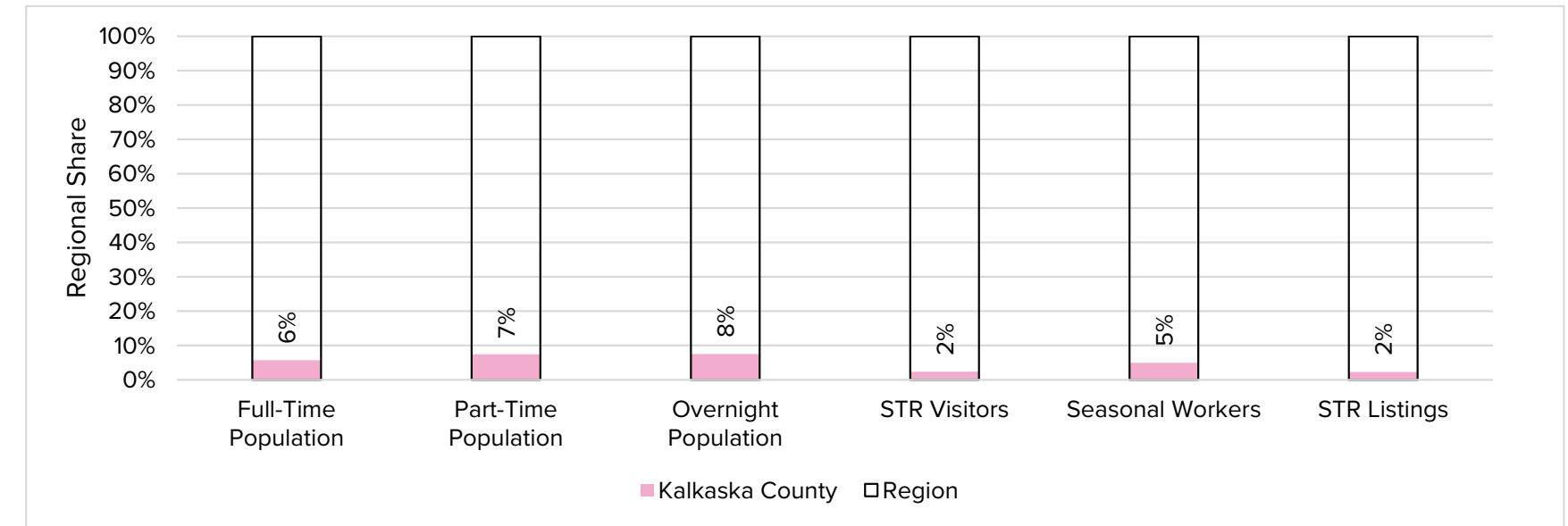
F-1. Seasonal Population - Kalkaska County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Full-Time Population	17,939	17,939	17,939	17,939	17,939	17,939	17,939	17,939	17,939	17,939	17,939	17,939	17,939
Part-Time Population	1,369	1,369	2,281	2,281	2,281	7,149	7,149	7,149	2,738	2,738	2,738	1,369	3,384
Overnight Population	2,875	2,753	2,112	10,393	14,653	15,362	17,707	17,694	15,375	12,502	2,270	2,293	9,666
Accommodations	2,423	2,188	1,819	10,066	13,828	14,266	16,463	16,463	14,266	11,315	1,761	1,819	8,890
Short-term Rentals	452	564	293	328	825	1,097	1,245	1,231	1,109	1,187	510	474	776
Total	22,183	22,061	22,333	30,614	34,873	40,450	42,795	42,781	36,052	33,179	22,947	21,601	30,989

Figure 14. Population Breakdown, Kalkaska County
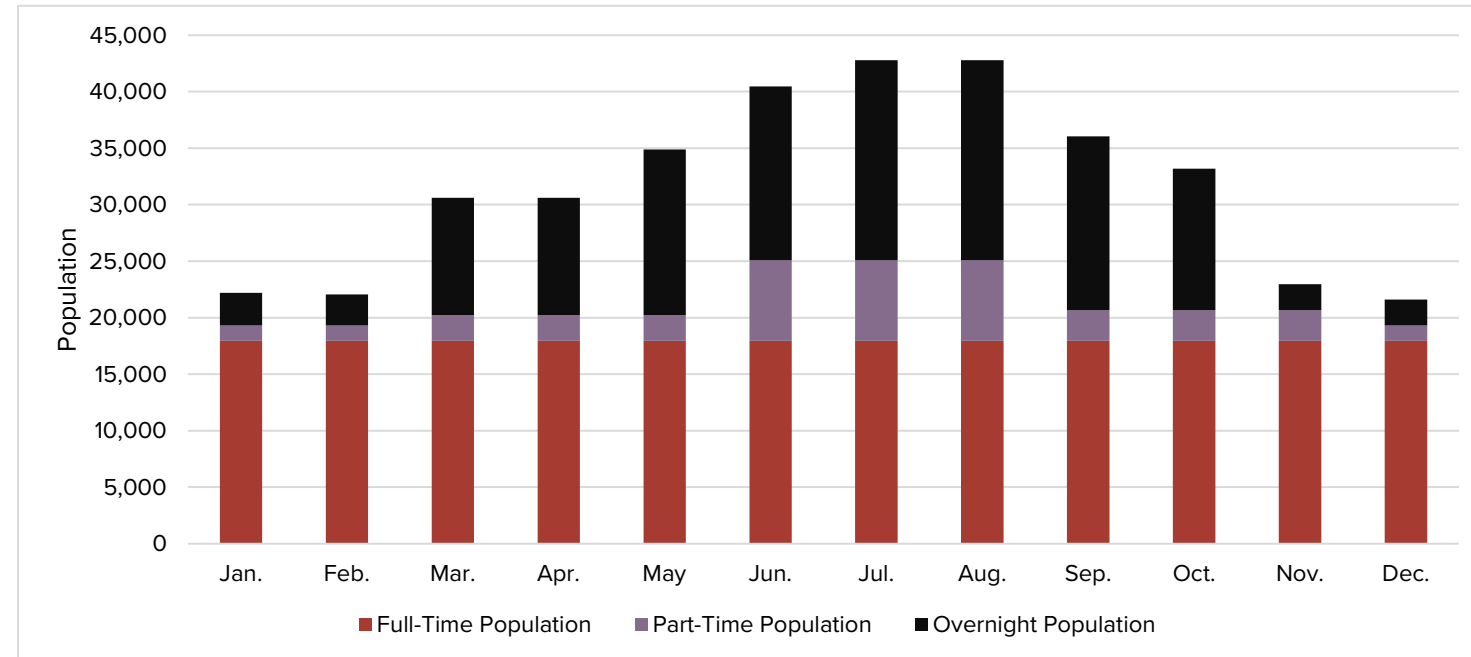
Table F-2. Short-term Rental Details - Kalkaska County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Max Listings	103	105	107	105	92	96	98	99	99	100	103	103	101
Average Listings	100	104	106	102	89	93	96	98	97	98	101	103	99
Available Nights	1,814	1,688	1,818	1,745	1,732	1,313	981	1,288	2,215	2,388	1,698	1,710	1,699
Available Room Nights	6,425	5,946	6,310	6,002	5,594	4,296	3,072	4,008	5,616	6,433	5,848	6,024	5,465
Nights Booked	287	323	188	202	547	651	749	772	815	828	315	274	496
Room Nights Booked	862	1,075	558	624	1,572	2,089	2,371	2,345	2,113	2,261	971	903	1,479
Occupancy Rate	15.8%	19.1%	10.3%	11.6%	31.6%	49.6%	76.4%	59.9%	36.8%	34.7%	18.6%	16.0%	31.7%

Table F-3. Seasonal Workforce - Kalkaska County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Labor Force	7,549	7,541	7,609	7,599	7,995	7,947	8,061	7,924	7,643	7,551	7,537	7,545	7,708
Employed	6,938	6,923	7,087	7,126	7,551	7,355	7,477	7,452	7,222	7,176	7,140	7,058	7,209
Non-Seasonal	6,915	6,918	7,011	6,993	7,081	6,668	6,693	6,742	6,791	6,809	6,867	6,886	6,865
Seasonal	23	5	76	133	470	687	784	710	431	367	273	172	344
Percent of Labor Force Seasonal	0.3%	0.1%	1.0%	1.7%	5.9%	8.6%	9.7%	9.0%	5.6%	4.9%	3.6%	2.3%	4.4%

Leelanau County

Leelanau County experiences the greatest change between the off-season and on-season of any county in the region. The total population grows by a staggering 126%, topping out at 60,094 individuals in the month of July. The growth is driven by a large number of part-time residents and overnight visitors. The part-time population accounts for over 20% of the total population in the months of June, July, and August, the largest share of any county. The number of overnight visitors in Leelanau County approaches 26,000 individuals, most of whom stay in traditional accommodation businesses. Leelanau County also has one of the highest concentrations of short-term rentals, accounting for 16% of the total listings in the region. The number of people staying in the short-term rentals is second highest in the region behind only Grand Traverse County. The number of seasonal workers in Leelanau County reaches a peak of roughly 1,100 workers in the month of July, and the respective share of seasonal workers in the total labor force is similar to the regional averages.

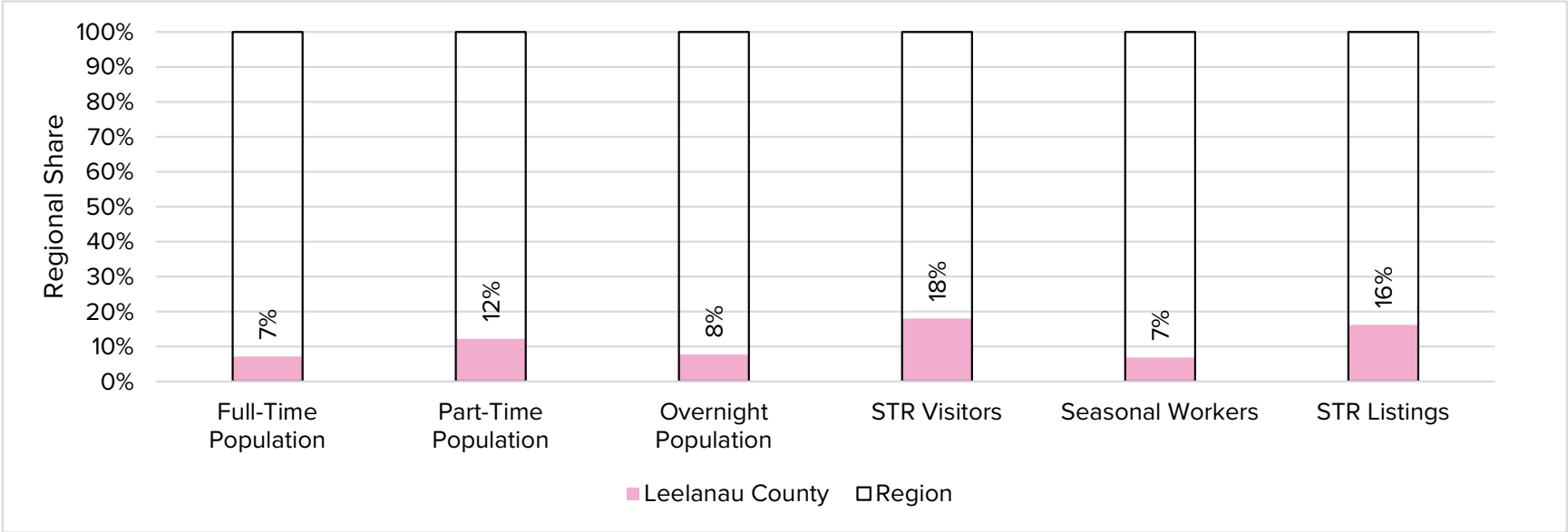Figure 15. Regional Share, Leelanau County

Table G-1. Seasonal Population - Leelanau County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Full-Time Population	22,301	22,301	22,301	22,301	22,301	22,301	22,301	22,301	22,301	22,301	22,301	22,301	22,301
Part-Time Population	1,543	1,543	2,057	2,057	2,057	11,829	11,829	11,829	2,914	2,914	2,914	1,543	4,586
Overnight Population	2,786	3,043	3,274	4,492	17,251	21,112	25,964	25,656	15,522	11,312	4,237	3,612	11,522
Accommodations	827	749	806	1,378	11,836	13,396	16,760	16,585	8,032	4,090	966	841	6,356
Short-term Rentals	1,960	2,294	2,468	3,113	5,415	7,716	9,204	9,071	7,490	7,223	3,271	2,771	5,166
Total	26,630	26,887	27,632	28,850	41,610	55,242	60,094	59,786	40,737	36,528	29,452	27,456	38,409

Figure 16. Population Breakdown, Leelanau County
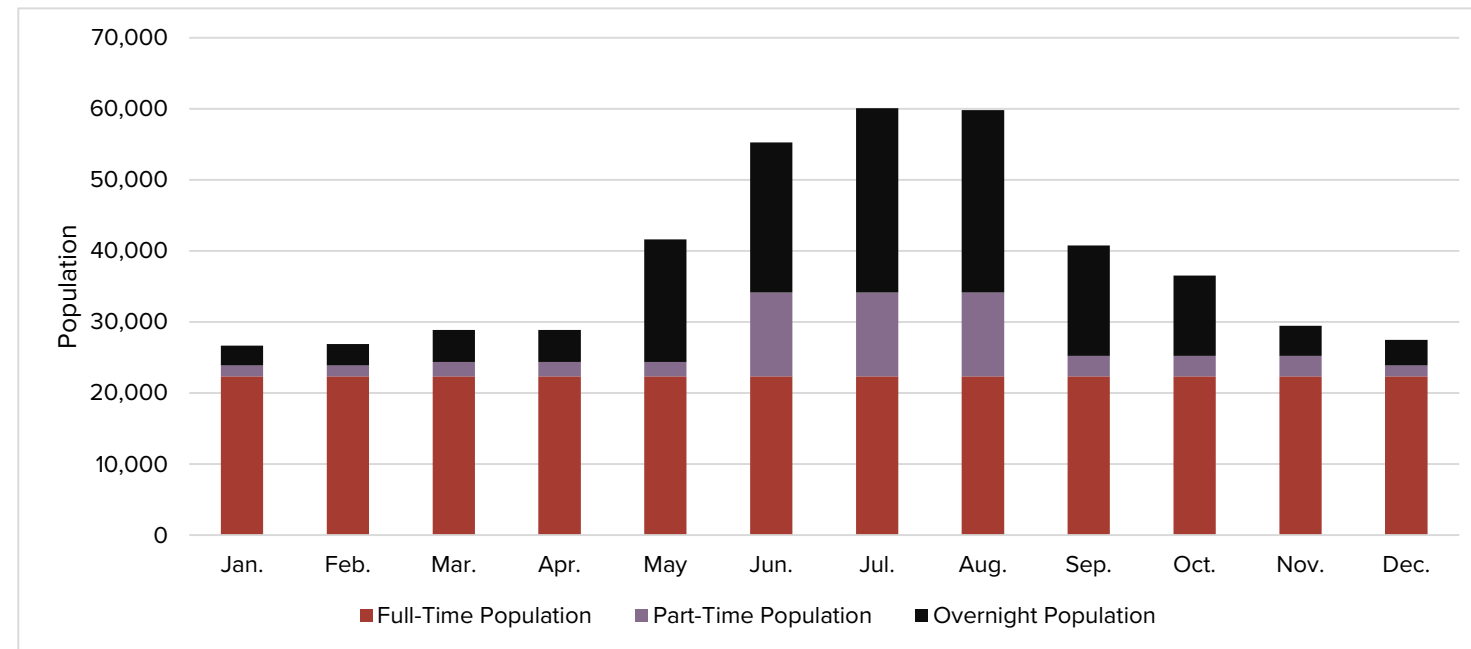
Table G-2. Short-term Rental Details - Leelanau County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Max Listings	659	658	662	681	617	645	682	708	713	693	648	620	666
Average Listings	655	655	657	675	586	629	664	689	699	679	627	615	652
Available Nights	15,922	14,257	15,555	15,936	13,313	12,785	12,443	13,257	15,394	16,875	15,121	14,968	14,652
Available Room Nights	37,596	33,490	36,655	37,636	30,997	28,991	28,739	30,079	35,045	38,984	36,642	36,350	34,267
Nights Booked	1,570	1,803	1,993	2,437	4,565	6,648	8,121	7,986	6,773	6,250	2,603	2,146	4,408
Room Nights Booked	3,733	4,370	4,701	5,931	10,316	14,699	17,534	17,280	14,269	13,759	6,231	5,278	9,842
Occupancy Rate	9.9%	12.6%	12.8%	15.3%	34.3%	52.0%	65.3%	60.2%	44.0%	37.0%	17.2%	14.3%	31.2%

Table G-3. Seasonal Workforce - Leelanau County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Labor Force	9,720	9,780	9,979	9,986	10,584	10,450	10,633	10,556	10,187	10,038	9,936	9,817	10,139
Employed	9,212	9,249	9,511	9,555	10,173	9,878	10,082	10,089	9,785	9,689	9,599	9,417	9,687
Non-Seasonal	9,212	9,249	9,384	9,368	9,485	8,942	8,984	9,048	9,109	9,126	9,203	9,216	9,194
Seasonal	0	0	127	187	688	936	1,098	1,041	676	563	396	201	493
Percent of Labor Force Seasonal	0.0%	0.0%	1.3%	1.9%	6.5%	9.0%	10.3%	9.9%	6.6%	5.6%	4.0%	2.0%	4.8%

Manistee County

Between the months of January and August, Manistee County's population nearly doubles. The total population of 28,218 in January, of which 89% are permanent residents, increases by 26,706 to 54,924 people in August. The summer population is just below 50% permanent residents, roughly 35% overnight visitors, and 18% part-time residents. In the summer, traditional accommodation businesses host the majority of overnight visitors totaling 17,599 in the month of July. However, in the off-season, STRs and accommodation businesses account for similar proportions of overnight visitors. On a monthly basis, there is an average of roughly 230 STR listings in Manistee County, which is approximately 5% of the region's STR listings. Manistee County's seasonal workforce follows regional trends and peaks in July with 964 seasonal workers, 9.4% of the total labor force.

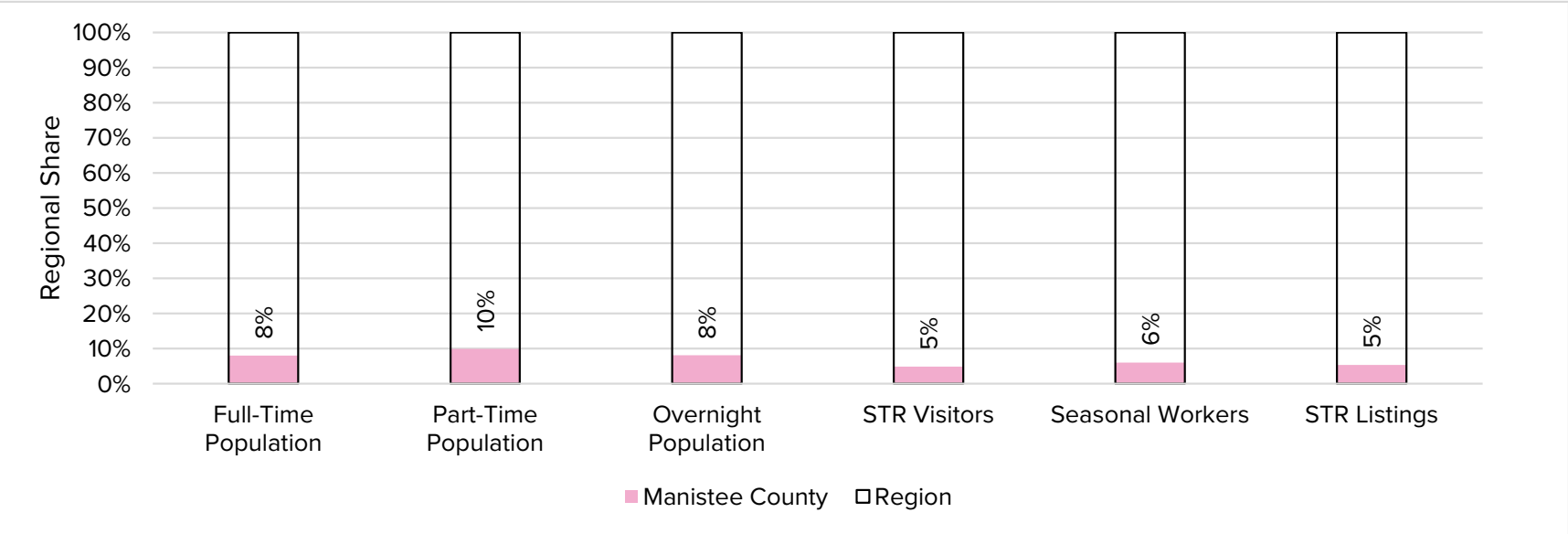Figure 17. Regional Share, Manistee County

Table H-1. Seasonal Population - Manistee County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Full-Time Population	25,032	25,032	25,032	25,032	25,032	25,032	25,032	25,032	25,032	25,032	25,032	25,032	25,032
Part-Time Population	1,134	1,134	2,106	2,106	2,106	9,558	9,558	9,558	2,916	2,916	2,916	1,134	3,928
Overnight Population	2,052	2,078	2,080	2,790	14,681	16,610	20,066	20,334	11,040	6,385	2,284	2,398	8,566
Accommodations	1,062	964	1,027	1,668	12,467	14,132	17,599	17,400	8,627	4,572	1,242	1,088	6,821
Short-term Rentals	990	1,114	1,053	1,122	2,215	2,478	2,467	2,934	2,414	1,813	1,041	1,310	1,746
Total	28,218	28,244	29,218	29,928	41,819	51,200	54,656	54,924	38,988	34,333	30,232	28,564	37,527

Figure 18. Population Breakdown, Manistee County
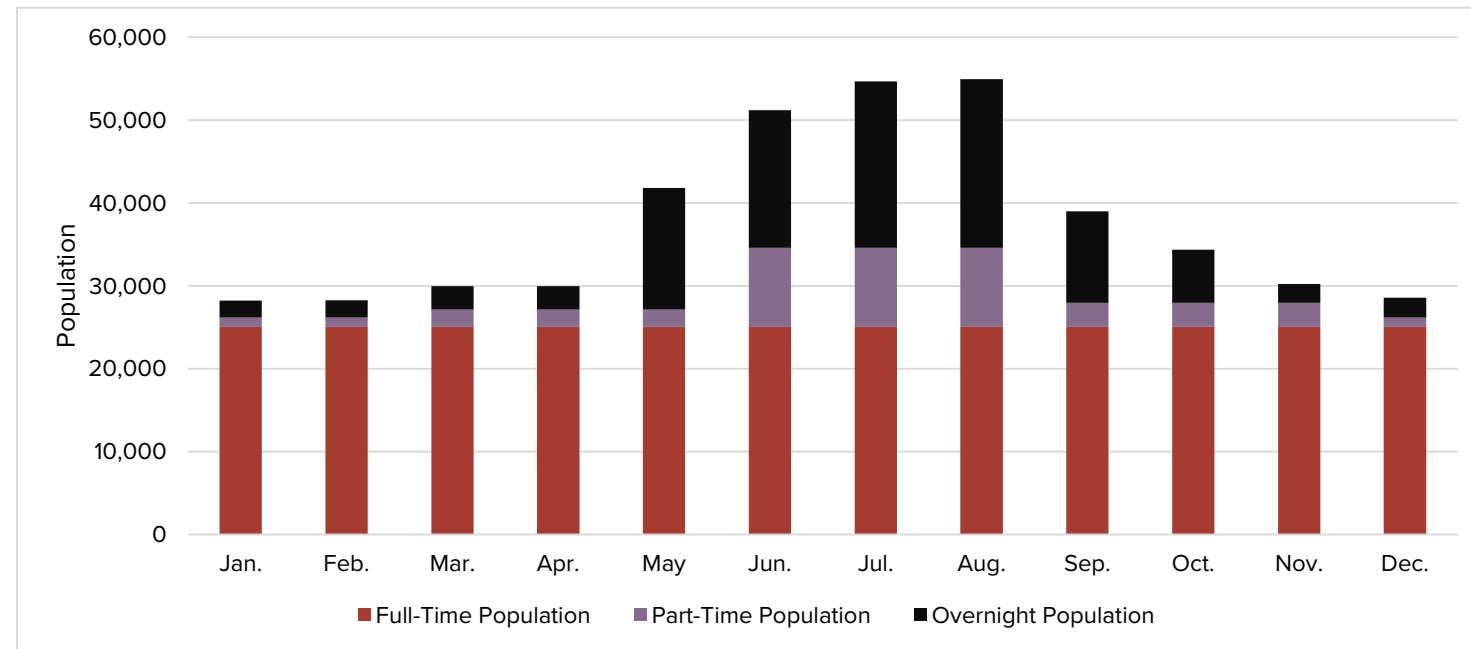
Table H-2. Short-term Rental Details - Manistee County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Max Listings	237	247	255	249	213	222	226	229	231	226	223	234	233
Average Listings	235	241	251	237	208	218	221	226	228	222	221	227	228
Available Nights	3,917	3,760	4,593	4,355	3,988	3,477	2,652	3,394	4,004	4,032	3,699	4,047	3,827
Available Room Nights	10,345	9,923	11,869	11,261	10,483	8,937	6,287	8,728	10,527	10,592	9,636	10,456	9,920
Nights Booked	775	831	869	882	1,610	1,851	1,929	2,170	1,827	1,456	811	952	1,330
Room Nights Booked	1,885	2,122	2,006	2,137	4,219	4,720	4,700	5,590	4,598	3,454	1,984	2,495	3,326
Occupancy Rate	19.8%	22.1%	18.9%	20.3%	40.4%	53.2%	72.7%	63.9%	45.6%	36.1%	21.9%	23.5%	36.5%

Table H-3. Seasonal Workforce - Manistee County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Labor Force	9,525	9,563	9,692	9,975	10,538	10,198	10,233	10,136	9,814	9,765	9,577	9,518	9,878
Employed	8,806	8,845	9,073	9,363	9,968	9,398	9,447	9,485	9,261	9,276	9,096	8,949	9,247
Non-Seasonal	8,806	8,845	9,073	9,149	9,340	8,490	8,483	8,556	8,630	8,752	8,802	8,865	8,816
Seasonal	0	0	0	214	628	908	964	929	631	524	294	84	431
Percent of Labor Force Seasonal	0.0%	0.0%	0.0%	2.1%	6.0%	8.9%	9.4%	9.2%	6.4%	5.4%	3.1%	0.9%	4.3%

Missaukee County

Missaukee County is the smallest county in the region by population. The permanent population of 15,052 accounts for roughly 5% of the region's permanent population. Missaukee's off-season population remains relatively stable, fluctuating only slightly with the arrival/departure of part-time residents. The growth of the county in the summer and into the fall is driven by overnight visitors staying in accommodation businesses. Because most of the accommodation businesses in Missaukee County are campgrounds, RV parks, and cabins, many of the businesses are closed in the off-season, contributing to the low overnight visitor population. Additionally, Missaukee County has the fewest number of short-term rentals, averaging roughly 34 each month. The county's seasonal workforce is also small, compared to the other counties in the region, and at most accounts for 5.3% of the total county labor force.

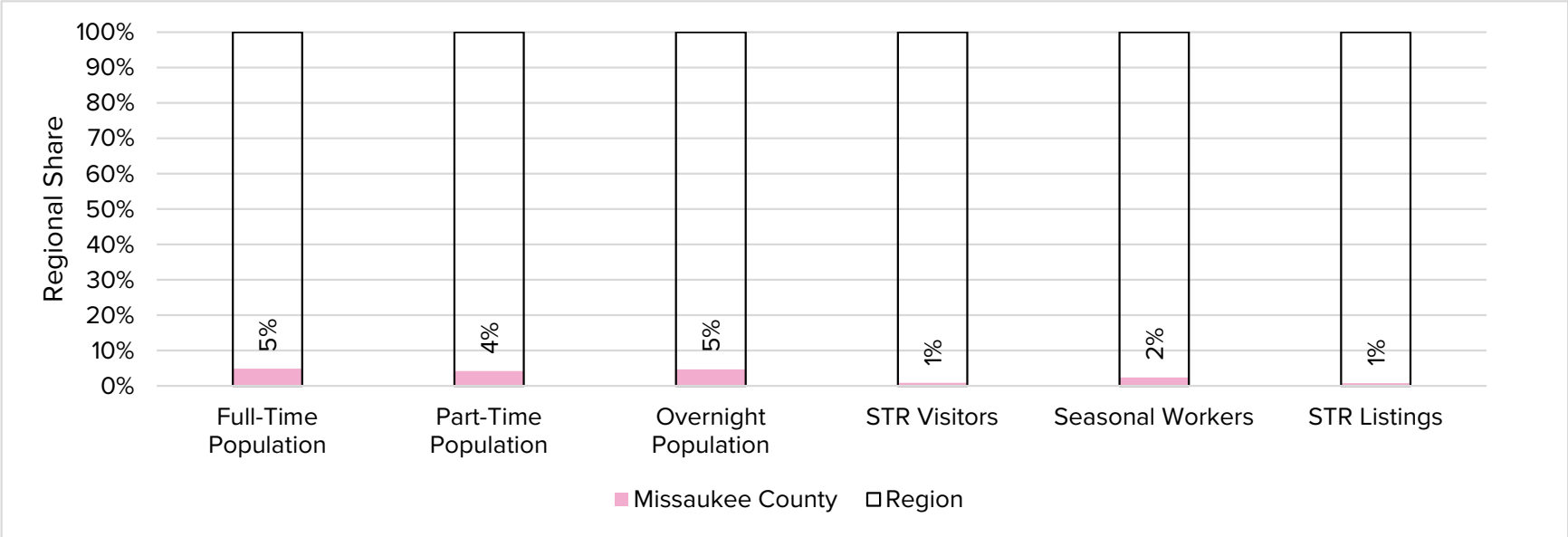Figure 19. Regional Share, Missaukee County

Table I-1. Seasonal Population - Missaukee County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Full-Time Population	15,052	15,052	15,052	15,052	15,052	15,052	15,052	15,052	15,052	15,052	15,052	15,052	15,052
Part-Time Population	782	782	1,304	1,304	1,304	4,085	4,085	4,085	1,565	1,565	1,565	782	1,934
Overnight Population	91	142	123	125	9,989	9,947	10,757	10,677	9,755	9,887	9,567	251	5,943
Accommodations	0	0	0	0	9,814	9,655	10,303	10,303	9,497	9,732	9,418	0	5,727
Short-term Rentals	91	142	123	125	175	291	454	373	258	154	149	251	216
Total	15,926	15,977	16,479	16,481	26,345	29,084	29,894	29,814	26,372	26,503	26,184	16,086	22,929

Figure 20. Population Breakdown, Missaukee County
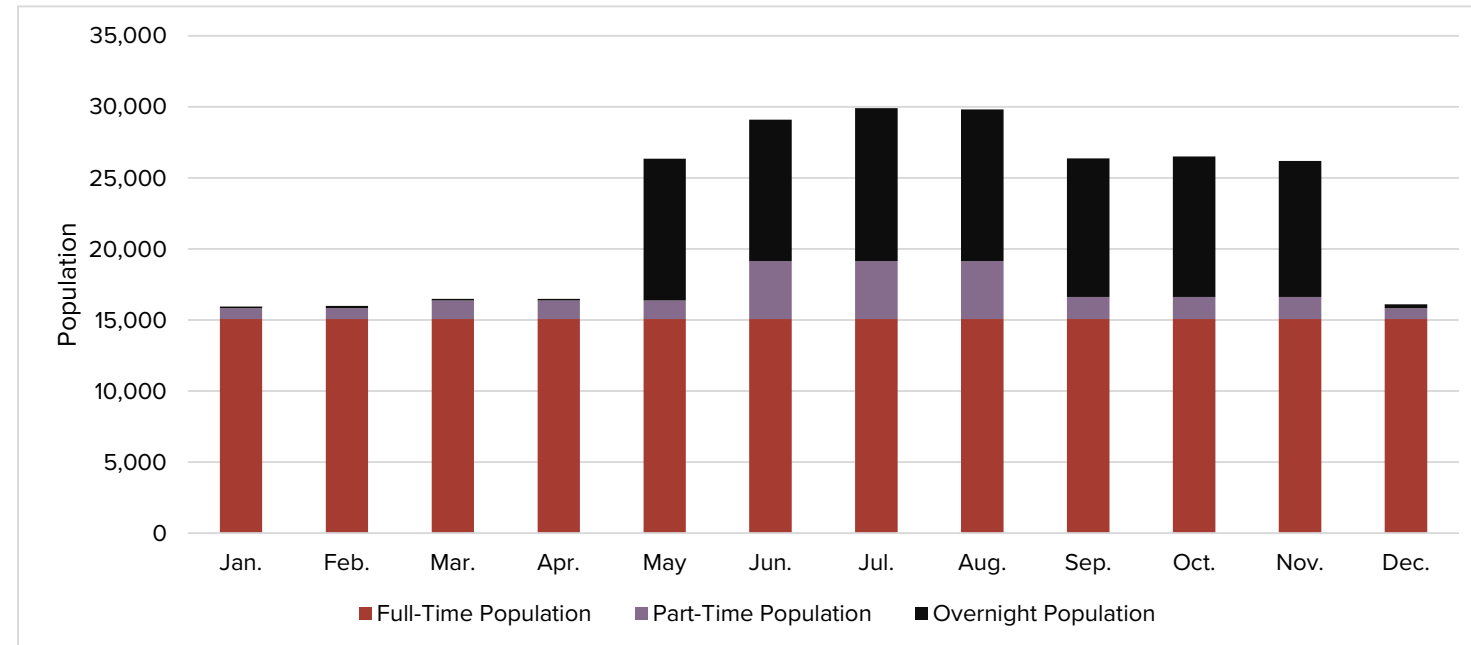
Table I-2. Short-term Rental Details - Missaukee County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Max Listings	35	38	39	38	30	32	34	34	34	30	30	33	34
Average Listings	35	37	39	36	28	31	33	33	31	29	30	30	33
Available Nights	556	541	673	671	503	497	467	547	634	615	507	590	567
Available Room Nights	1,694	1,673	2,122	2,156	1,424	1,426	1,254	1,446	1,795	1,770	1,501	1,731	1,666
Nights Booked	54	87	82	76	98	187	303	267	159	119	106	148	141
Room Nights Booked	174	271	234	239	333	555	864	711	491	294	283	479	411
Occupancy Rate	9.7%	16.1%	12.2%	11.3%	19.5%	37.6%	64.9%	48.8%	25.1%	19.3%	20.9%	25.1%	25.9%

Table I-3. Seasonal Workforce - Missaukee County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Labor Force	6,602	6,645	6,790	6,782	7,074	7,010	7,038	7,019	6,875	6,807	6,682	6,630	6,830
Employed	6,194	6,228	6,436	6,439	6,761	6,590	6,614	6,665	6,588	6,534	6,445	6,336	6,486
Non-Seasonal	6,194	6,228	6,416	6,415	6,495	6,221	6,239	6,295	6,341	6,339	6,356	6,336	6,323
Seasonal	0	0	20	24	266	369	375	370	247	195	89	0	163
Percent of Labor Force Seasonal	0.0%	0.0%	0.3%	0.4%	3.8%	5.3%	5.3%	5.3%	3.6%	2.9%	1.3%	0.0%	2.3%

Wexford County

Wexford County is the least-seasonal county in the region, with the total population change by roughly 42% between 40,879 in the month of February and 58,168 in July. The permanent population represents roughly 78% of the total population in the off-season and 61% of the total population in the on-season. The seasonal growth of the county is driven by people staying in traditional accommodation businesses. In July, there are 19,025 individuals staying in traditional accommodation businesses in Wexford County (33% of the total population). However, Wexford County only accounts for 9% of the regional accommodation visitors in the month of July. STR visitors are not as prevalent in Wexford County with an average of 800 STR visitors each month. Wexford County also has a small seasonal workforce as the seasonal workers never account for more than 4.4% of the total county labor force.

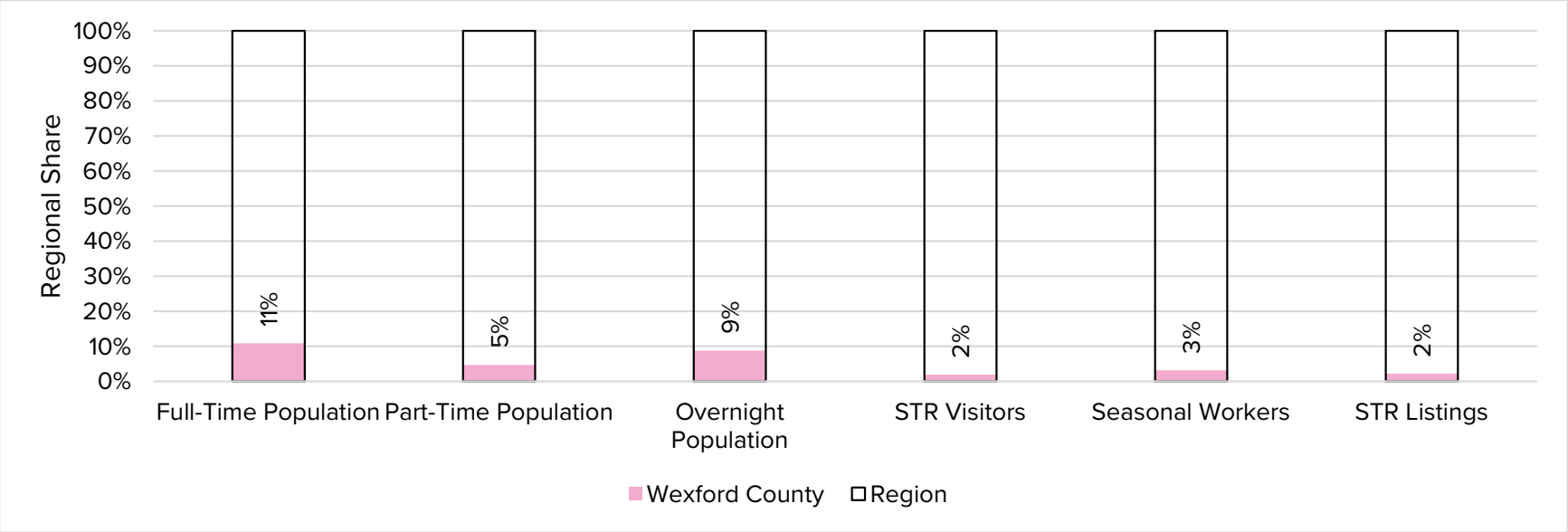Figure 21. Regional Share, Wexford County

Table J-1. Seasonal Population - Wexford County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Full-Time Population	33,673	33,673	33,673	33,673	33,673	33,673	33,673	33,673	33,673	33,673	33,673	33,673	33,673
Part-Time Population	860	860	1,433	1,433	1,433	4,490	4,490	4,490	1,720	1,720	1,720	860	2,126
Overnight Population	6,939	6,346	9,519	9,763	17,825	18,147	20,005	19,898	17,554	11,308	9,577	6,877	12,813
Accommodations	6,136	5,552	8,992	9,102	16,941	17,360	19,025	18,896	16,615	10,368	9,032	6,194	12,018
Short-term Rentals	803	794	527	661	884	786	980	1,003	939	940	545	683	795
Total	41,472	40,879	44,625	44,869	52,931	56,310	58,168	58,061	52,946	46,701	44,970	41,410	48,612

Figure 22. Population Breakdown, Wexford County
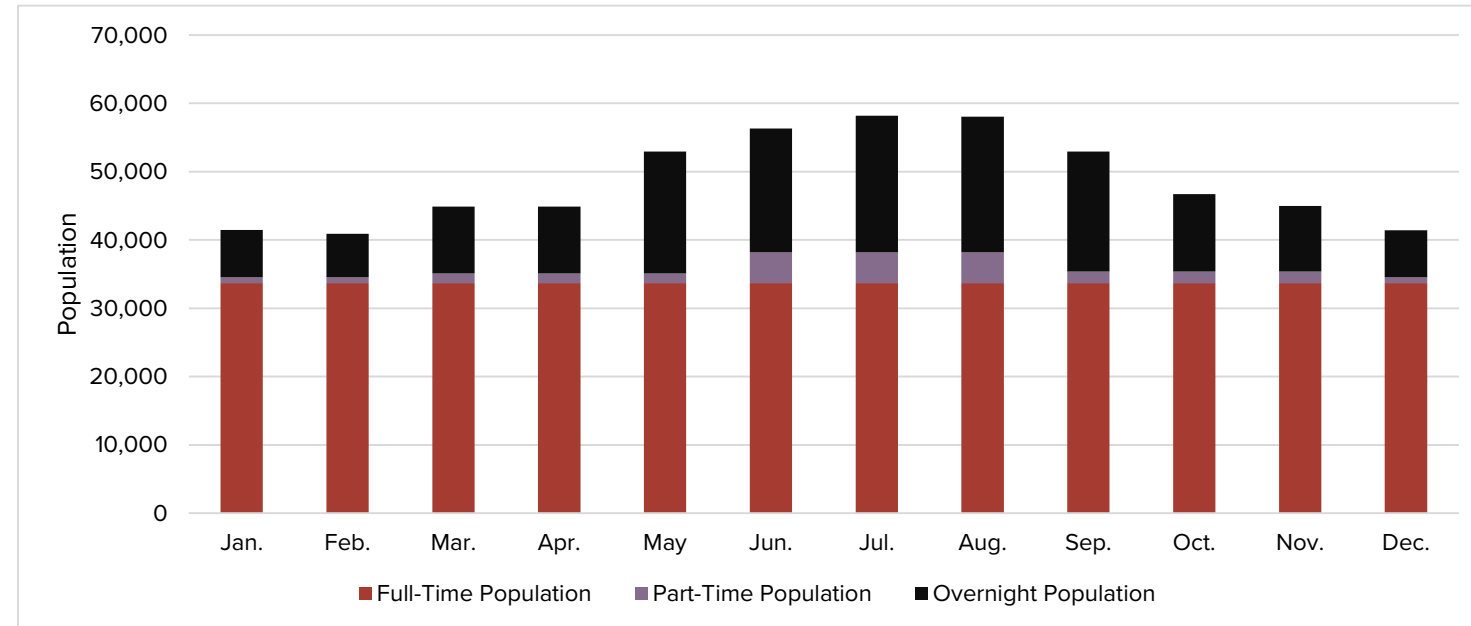
Table J-2. Short-term Rental Details - Wexford County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Max Listings	100	101	101	105	80	86	93	95	98	97	95	97	96
Average Listings	98	99	99	101	75	83	88	93	95	95	93	94	93
Available Nights	2,215	2,082	2,236	2,430	1,868	1,834	1,901	2,045	2,244	2,345	2,080	2,174	2,121
Available Room Nights	4,548	4,299	4,830	5,167	3,791	3,361	3,658	3,814	4,406	4,719	4,297	4,614	4,292
Nights Booked	578	598	386	491	730	701	938	880	776	753	424	500	646
Room Nights Booked	1,530	1,512	1,003	1,259	1,684	1,498	1,867	1,910	1,788	1,791	1,038	1,301	1,515
Occupancy Rate	26.1%	28.7%	17.3%	20.2%	39.1%	38.2%	49.3%	43.0%	34.6%	32.1%	20.4%	23.0%	31.0%

Table J-3. Seasonal Workforce - Wexford County

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
Labor Force	14,307	14,346	14,563	14,584	15,113	15,025	14,903	14,780	14,491	14,424	14,386	14,327	14,604
Employed	13,489	13,522	13,884	13,909	14,432	14,045	13,916	13,965	13,802	13,793	13,799	13,640	13,850
Non-Seasonal	13,489	13,505	13,820	13,782	13,961	13,391	13,415	13,477	13,554	13,537	13,572	13,539	13,587
Seasonal	0	17	64	127	471	654	501	488	248	256	227	101	263
Percent of Labor Force Seasonal	0.0%	0.1%	0.4%	0.9%	3.1%	4.4%	3.4%	3.3%	1.7%	1.8%	1.6%	0.7%	1.8%

Appendix

Accommodation Survey

Thank you for taking the time to fill out this brief survey. Networks Northwest, the regional planning body for northwest Michigan, is conducting a study of the seasonal population in the region. Understanding how populations change throughout the year provides local leaders a valuable data source for decision making, economic development, and capital improvements. A critical component of this process is inventorying local accommodation businesses to estimate the number of people staying in hotels, motels, inns, etc.

Any information provided will not be shared with the public or other parties outside of the project team. All information will be aggregated at the county level to ensure confidentiality.

1. What is the name of your business?

2. What is the address of your business?

3. How would you describe your business?

   a. Bed & Breakfast

   b. Cabin, Cottage, Vacation Rental

   c. Campground

   d. RV Park

   e. Hotel

   f. Motel

   g. Resort

   h. Other (please specify)

4. What is the total number of rooms, lots, or campsites available for overnight accommodation?

5. What is the average number of occupants per room, lot, or campsite?

6. What is the occupancy rate (percentage of rooms, lots, or campsite occupied) during each month of the year?

   a. January: _____

   b. February: _____

   c. March: _____

   d. April: _____

   e. May: _____

   f. June: _____

   g. July: _____

   h. August: _____

   i. September: _____

   j. October: _____

   k. November: _____

   l. December: _____

7. Are the occupant rates exact or estimated?

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