Investigating the Economic Footprint of Cultural Tourism in Aruba

12-5-2009

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The Image of Central Florida as a Vacation Destination

by:
Dick Pope Sr. Institute for Tourism Studies
University of Central Florida

January 1991

Methodology

- Sample universe: fourteen SMSAs in seven states that generated the highest number of tourists to Florida in 1989.
- Interviews were conducted in two SMSAs in each of the following states: CA, GA, MI, NY, OH, PA, and TX.
- Screening: all respondents must have taken at least one VACATION trip during the past two years outside their home state.
- Sample: 750 households.
- Instrument: structured telephone questionnaire with a few open-ended questions.
- Response rate: 69.6%
Respondents’ Vacation Travel Behavior

- Respondents have taken an average of 7.2 and a median of 5 trips outside their home state in the past five years.
- 86% of those trips were in the continental U.S.
- Respondents usually spent an average of 9.9 days and a median of 7 days on their out-of-state vacation trips.
- They usually took their vacation in any season (45.6%) or in the summer (31.8%)
- The majority of the respondents usually begin planning their vacation trips 1-3 months (53.8%) prior to their departure.
- The male and female equally (41.1%) usually choose the vacation destination. In some households, the female is the major decision maker of destination choice (23.9%)

Impact of Children on Vacation Destination Choice

![Pie chart showing the impact of children on vacation destination choice]

Note: "How important are children in deciding where to go on vacation?"
33% of households had children; Median=2
Sources of Information Used for Planning Out-of-State Vacation

Source

<table>
<thead>
<tr>
<th>Source</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel agency</td>
<td>33.3%</td>
</tr>
<tr>
<td>Friends &amp; relatives</td>
<td>30.6%</td>
</tr>
<tr>
<td>Travel clubs</td>
<td>23.6%</td>
</tr>
<tr>
<td>Brochures</td>
<td>13.3%</td>
</tr>
<tr>
<td>Previous experience</td>
<td>11.8%</td>
</tr>
<tr>
<td>Newspaper articles</td>
<td>10.5%</td>
</tr>
<tr>
<td>Magazine articles</td>
<td>9.7%</td>
</tr>
<tr>
<td>Travel guide books</td>
<td>9%</td>
</tr>
</tbody>
</table>

Note: Multiple responses

Sources of Information Used for Planning Out-of-State Vacation (cont'd)

Source

<table>
<thead>
<tr>
<th>Source</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airline</td>
<td>8.9%</td>
</tr>
<tr>
<td>Newspaper ads</td>
<td>3.6%</td>
</tr>
<tr>
<td>Magazine ads</td>
<td>3.4%</td>
</tr>
<tr>
<td>TV ads</td>
<td>1.9%</td>
</tr>
<tr>
<td>Tour operator</td>
<td>1.7%</td>
</tr>
<tr>
<td>Radio ads</td>
<td>0.3%</td>
</tr>
<tr>
<td>Other</td>
<td>16.6%</td>
</tr>
</tbody>
</table>

Note: Multiple responses
State Which Respondents Would Most Like to Revisit

<table>
<thead>
<tr>
<th>State</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Florida</td>
<td>19.7%</td>
</tr>
<tr>
<td>California</td>
<td>14.9%</td>
</tr>
<tr>
<td>Colorado</td>
<td>5.5%</td>
</tr>
<tr>
<td>New York</td>
<td>4.1%</td>
</tr>
<tr>
<td>Nevada</td>
<td>3.9%</td>
</tr>
<tr>
<td>Texas</td>
<td>2.9%</td>
</tr>
<tr>
<td>Virginia</td>
<td>2.9%</td>
</tr>
<tr>
<td>South Carolina</td>
<td>2.7%</td>
</tr>
<tr>
<td>Arizona</td>
<td>2.5%</td>
</tr>
<tr>
<td>North Carolina</td>
<td>2.4%</td>
</tr>
</tbody>
</table>

Note: "Which state would you most like to visit again in the future?"

State Which Respondents Would Like to Visit for the First Time

<table>
<thead>
<tr>
<th>State</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>California</td>
<td>11.5%</td>
</tr>
<tr>
<td>Hawaii</td>
<td>10.3%</td>
</tr>
<tr>
<td>Washington</td>
<td>6.5%</td>
</tr>
<tr>
<td>Colorado</td>
<td>5.5%</td>
</tr>
<tr>
<td>Florida</td>
<td>5.3%</td>
</tr>
<tr>
<td>Alaska</td>
<td>4.8%</td>
</tr>
<tr>
<td>Maine</td>
<td>4.5%</td>
</tr>
<tr>
<td>Arizona</td>
<td>4%</td>
</tr>
<tr>
<td>Texas</td>
<td>3.9%</td>
</tr>
<tr>
<td>Wyoming</td>
<td>2.7%</td>
</tr>
</tbody>
</table>

Note: "Which state that you have never visited would you like to visit?"
Visiting Experience to Florida

Note: "Have you ever visited Florida?"

Why didn’t you Visit Florida?

- No interest: 31.3%
- Too expensive: 14.7%
- See other states: 14.7%
- Shortage of time: 11.3%
- Weather too hot: 5.3%
- Negative opinions-FL: 2%
- Lack of information: 1.3%
- Other: 32%

Note: Multiple responses
Familiarity with Central Florida

Note: "Have you heard of a tourist destination called Central Florida?"

Cities/Towns Affiliated with Central FL

Cites/Towns

<table>
<thead>
<tr>
<th>Cities/Towns</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orlando</td>
<td>79.9%</td>
</tr>
<tr>
<td>Walt Disney World</td>
<td>18%</td>
</tr>
<tr>
<td>Tampa</td>
<td>17.7%</td>
</tr>
<tr>
<td>Kissimme/St. Cloud</td>
<td>17.1%</td>
</tr>
<tr>
<td>St. Petersburg</td>
<td>8.5%</td>
</tr>
<tr>
<td>Miami</td>
<td>7.3%</td>
</tr>
<tr>
<td>Ft. Lauderdale</td>
<td>7.3%</td>
</tr>
<tr>
<td>Jacksonville</td>
<td>2.7%</td>
</tr>
</tbody>
</table>

Note: "Which cities or towns does Central Florida comprise of?"
Cities/Towns Affiliated with Central FL
(Continued)

<table>
<thead>
<tr>
<th>Cities/Towns</th>
<th>Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Winter Park</td>
<td>1.8%</td>
</tr>
<tr>
<td>Lake Buena Vista</td>
<td>1.5%</td>
</tr>
<tr>
<td>Casselberry</td>
<td>0.9%</td>
</tr>
<tr>
<td>Ft. Myers</td>
<td>0.6%</td>
</tr>
<tr>
<td>Maitland</td>
<td>0.3%</td>
</tr>
<tr>
<td>Oviedo</td>
<td>0.3%</td>
</tr>
<tr>
<td>Sanford</td>
<td>0.3%</td>
</tr>
<tr>
<td>Other</td>
<td>30.5%</td>
</tr>
</tbody>
</table>

Note: "Which cities or towns does Central Florida comprise of?"

Visiting Experience to Central Florida
(Respondents who heard of Crl FL)

- No 21%
- Yes 79%

Note: "Have you ever visited Central Florida?"
N=335
Main Purpose of most Recent Visit to Central Florida

Purpose of visit

- Vacation: 59.8%
- Visiting Frds/Rel: 21.2%
- Business: 11%
- Convention/trade shw: 0.8%
- Other: 7.2%

Note: N=264

Did Central Florida Trip involve a Package Tour?

- Yes: 16%
- No: 84%

Note: N=263
Compared to Expectations, Central Florida Visit was...

Level of expectation

- 5. Much better: 10.8%
- 4. Somewhat better: 12.3%
- 3. About what expect: 68.5%
- 2. Slightly disapp.: 5.8%
- 1. Very disappoint: 2.7%

Note: N=260
Mean=3.2 Median=3.0

"Why didn’t you Visit Central Florida?"

- No interest: 29.2%
- Shortage of time: 20.8%
- Too expensive: 9.7%
- See other states: 9.7%
- Negative opinions-FL: 8.3%
- Weather too hot: 6.9%
- Lack of information: 4.2%
- Other: 30.6%

Note: Multiple responses
Other Destinations that were Perceived to be Similar to Central Florida

California (general) 26.4%
South Carolina 6.7%
Texas 5.1%
Los Angeles 4.9%
Arizona 2.6%
Hawaii 2.6%
Anahiem 2.4%
San Diego 2.2%

Note: an open-ended question

Other Destinations that were Perceived to be Similar to Central Florida (continued)

Houston 1.8%
Georgia 1.8%
Louisiana 1.6%
Daytona 1.4%
Tampa 1.4%
Washington D.C. 1.2%
North Carolina 1.2%
Other 36.7%

Note: an open-ended question
How Long does it take to Drive from Central Florida to the Closest Beach?

Note: 22.4% did not know
Median= two hours

How long does it take to Drive from Central Florida to Miami?

Length of drive

- One hour: 6.1%
- Two hours: 15.4%
- Three hours: 22.3%
- Four hours: 23.4%
- Five hours: 14.3%
- Six hours: 9.8%
- Seven hours: 2.6%
- Eight hours: 3.5%
- Over nine hours: 2.6%

Note: 27.9% did not know
Median= four hours
Why wouldn’t you be Interested in Visiting Central Florida?

- No interest: 32%
- Already been: 17.8%
- See other states: 15.2%
- Negative opinions-FL: 9.7%
- Weather too hot: 9.7%
- Too expensive: 6.3%
- Shortage of time: 4.8%
- Lack of information: 1.9%
- Other: 33.5%

Note: Multiple responses
N=269

Level of Interest to go to Central Florida in the next Two years

- No interest at all: 20%
- Not too interested: 16%
- Fairly interested: 37%
- Very interested: 27%

Mean=2.7  Median=3.0
How many Days should the Average Central Florida Vacation last?

- One day: 0.6%
- Two days: 1.7%
- Three days: 5.8%
- Four days: 7%
- Five days: 14.3%
- Six days: 1.8%
- Seven days: 41.2%
- Eight days: 1.8%
- Nine days: 0.4%
- Ten days: 8.3%
- 11-14 days: 13.7%
- Over 15 days: 3.4%

Note: Mean=8.0 days; Median=7 days

Type of Activities Available to Central Florida Tourists

Type of activities
- Beaches: 41.3%
- Attractions: 30.6%
- Water sports: 30.2%
- Golf: 21.3%
- Fishing: 16.4%
- Boating: 13.8%
- Tennis: 12.4%
- Night life: 11.1%

Note: Multiple responses
Type of Activities Available to Central Florida Tourists (continued)

Type of activities

- Rest & relaxation: 9.9%
- Historical sites: 9%
- Cultural/events: 5.1%
- Spectator sports: 4.8%
- Climate: 4.1%
- Visit Frds & rel: 3.7%
- Other: 48.1%

Note: Multiple responses

Familiarity with Central Florida Attractions

- Yes: 74%
- No: 26%

Note: Multiple responses
Familiarity with Specific Central Florida Attractions

Attraction

- WDW - Generic: 41.3%
- EPCOT Center: 30.6%
- Sea World: 30.2%
- Busch Gardens: 21.3%
- MGM Studio Tour: 16.4%
- Universal Studios: 13.8%
- Kennedy Space Center: 12.4%
- Cypress Gardens: 11.1%
- Magic Kingdom: 6.5%

Note: Multiple responses

Familiarity with Specific Central Florida Attractions

Attraction

- Silver Springs: 3.9%
- Wet N' Wild: 3.1%
- Pleasure Island: 3.1%
- Typhoon Lagoon: 2.5%
- Watermania: 2%
- Medieval Times: 1.8%
- Church Street Sta.: 1.6%
- Arabian Nights: 0.9%
- King Henry's Feast: 0.4%
- Other: 20.4%

Note: Multiple responses
Perceptions of Central Florida

<table>
<thead>
<tr>
<th>Statement</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central Floridians are hospitable toward tourists</td>
<td>3.6</td>
</tr>
<tr>
<td>Vacationing in Central Florida is a good value for money</td>
<td>3.4</td>
</tr>
<tr>
<td>All you hear about Central FL is Disney attractions</td>
<td>3.4</td>
</tr>
<tr>
<td>Prices of Central Florida attractions are reasonable</td>
<td>3.1</td>
</tr>
<tr>
<td>FL is very similar to other sunny destinations (CA, TX, LA)</td>
<td>3.1</td>
</tr>
</tbody>
</table>

Scale: 1=disagree strongly<-------->5=agree strongly

Perceptions of Central Florida (continued)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central Florida offers great shopping bargains</td>
<td>3.0</td>
</tr>
<tr>
<td>With the exception of a few attractions, Crl FL is rural</td>
<td>2.8</td>
</tr>
<tr>
<td>Orlando airport is small</td>
<td>2.7</td>
</tr>
<tr>
<td>The scenery in Florida is not diversified</td>
<td>2.7</td>
</tr>
<tr>
<td>The weather in Central Florida is too hot year-round</td>
<td>2.4</td>
</tr>
</tbody>
</table>

Scale: 1=disagree strongly<------>5=agree strongly
Perceptions of Central Florida (continued)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central FL is a destination for families only</td>
<td>2.3</td>
</tr>
<tr>
<td>There are not many hotels in Central Florida</td>
<td>2.1</td>
</tr>
<tr>
<td>There is not a lot of info available about Central Florida vacation</td>
<td>2.6</td>
</tr>
<tr>
<td>opportunities</td>
<td></td>
</tr>
<tr>
<td>Crl FL is an unsafe destination</td>
<td>2.1</td>
</tr>
</tbody>
</table>

Scale: 1=disagree strongly<------>5=agree strongly

Perceived Price of a One-Week Crl FL Vacation (all inclusive, per person)

Note: Mean= $1079  SD= $702
Median= $1000
20% of the respondents didn’t know
Exposure to Advertising about Central Florida

Note: "How often do you see, hear, or read advertising about travel to Central Florida?"

Type of Advertising Respondents were Exposed to

Type of advertising

- TV: 61.4%
- Newspapers: 52%
- Magazines: 39.5%
- Brochures: 9.5%
- Radio: 9.2%
- Billboards: 6.6%
- Direct mail: 5.4%
- Other: 10.1%

Note: Multiple responses
"Where did you see or hear advertising about Central Florida?"
Level of Likelihood to visit Central Florida in the next Two years

- Probably will: 35%
- Definitely will: 17%
- Definitely won't: 15%
- Probably will not: 33%
Age of the Respondents

<table>
<thead>
<tr>
<th>Age group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-29</td>
<td>21.8%</td>
</tr>
<tr>
<td>30-39</td>
<td>25.9%</td>
</tr>
<tr>
<td>40-49</td>
<td>17.5%</td>
</tr>
<tr>
<td>50-59</td>
<td>15.5%</td>
</tr>
<tr>
<td>60-69</td>
<td>11.6%</td>
</tr>
<tr>
<td>70 and over</td>
<td>7.7%</td>
</tr>
</tbody>
</table>

Marital Status of the Respondent

- Married: 60%
- Single: 23%
- Widowed: 8%
- Divorced/separated: 9%
Respondents' Highest Level of Education

Level of education

- Grade School: 1.1%
- Some high school: 2.8%
- High school diploma: 24.1%
- Some college: 23.5%
- College degree: 34.7%
- Advanced degree: 13.8%

Respondents' 1990 Household Income

Level of income

- Under $20,000: 11.8%
- $20-30,000: 20.1%
- $30-40,000: 20.9%
- $40-50,000: 15.9%
- $50-60,000: 10.8%
- $60-70,000: 6.4%
- $70-80,000: 4.1%
- Over $80,000: 11%

16.3% did not answer this question.
Gender of the Respondent

Male 42%

Female 58%
Who are more interested in visiting Central Florida in the next two years?

- Respondents in households where all members participate equally in vacation destination choice (rather than one dominant member).
- Respondents who had children under 18 living in their household.
- Respondents who had previously visited Central Florida.
- Respondents who were familiar with Crl FL attractions.
- Respondents who were often exposed to advertising about Central Florida.
- Female respondents.

Who are more likely to visit Central Florida in the next two years?

- Respondents in households where all members participate equally in vacation destination choice (rather than one dominant member).
- Respondents who had previously visited Florida.
- Respondents who had previously visited Central Florida.
- Respondents who were familiar with Crl FL attractions.
- Respondents who were often exposed to advertising about Central Florida.
- Married respondents.
Perceptions of Central Florida:
Respondents who had been vs. those who had not

Respondents who had been to Central Florida:
- Perceived Crl FL scenery to be less diversified.
- Perceived Central Floridians to be more hospitable toward tourists.
- Perceived Central Florida to be a safer destination.
- Perceived that more vacation information is available about Crl FL.
- Were more likely to have seen advertising about Crl FL.

than respondents who had never been to Central Florida

Perceptions of Central Florida:
Respondents who had been vs. those who had not

Respondents who had been to Central Florida agreed less with the following statements:
- "All you hear about Crl FL is Disney attractions."
- "Crl FL is a destination for families with children only."

than respondents who had never been to Central Florida
Perceptions of Central Florida: Respondents who had heard vs. those who had not

Respondents who had heard about Central Florida:

- Perceived Central Floridians to be more hospitable toward tourists.
- Were less likely to agree that "Florida is similar to other sunny destinations like CA, TX, LA, Carolinas."
- Were less likely to agree that "there are not many hotels in Central Florida."
- Were more likely to have seen advertising about Crl FL.

than respondents who had never been to Central Florida

Predictors of Interest and Likelihood to Visit Central Florida in the next Two Years
Summary of Findings

- Florida and Central Florida are high repeat-visitation destinations.

- Florida is not a very high first-time visit destination.

- Majority of subjects in states that generate the majority of tourists to Florida, have not heard of Central Florida.

- Those who have heard of Central Florida have also visited it.

- Majority of visitors to Central Florida are vacationeers.

- Level of satisfaction with Ctr. Fl. visit was about what the subjects expected.
- Central Florida was perceived to be similar to California.
- The level of INTEREST to go to Ctr. Fl. in the next two years was high (64%).
- Beaches and attractions were perceived to be the most common type of activities available in Ctr. Fl.
- Specific perceptions about Ctr. Fl. and its touristic attractions and facilities were all positive.
- Price perceptions of Ctr. Fl. "typical vacation" were mostly accurate.
- Exposure to advertising about Ctr. Fl. was relatively high.
- The most mentioned advertising media were TV, newspapers and magazines.
- The level of LIKELIHOOD to visit Ctr. Fl. in the next two years was pretty high (52%).
Profile of Potential Visitors To Central Florida

Previous visitors to Florida

Previous visitors to Central Florida

People who are familiar with Central Florida attractions

People who were exposed to advertising about Central Florida

Married people

People with children under 18 in their households

Females

Democratic "vacation decision-makers"