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## Curacao North Sea Jazz & Destination Convergence: A Harbinger Beckoning?

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# Curaçao North Sea Jazz & Destination Convergence: A harbinger beckoning?



  
BON INTENSHON

**curaçao**  
**north**  
**sea Jazz**  


  
University of  
Central  
Florida

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# EXECUTIVE SUMMARY

The CNSJF was held at the World Trade Center in Curaçao on September 3-5, 2015, marking the 6th annual CNSJF. This year's festival offered, similar to the previous year, a unique promotion with one free admission to a show on Thursday night (September 3) featuring Juanes and Oscar de Leon. Friday and Saturday featured an impressive line-up of twenty-five top performers including Grammy Award-winning singer-songwriters John Legend and Lionel Ritchie, R&B legends The Isley Brothers, Grammy-winning star jazz vocalist Cassandra Wilson, Enrique Iglesias, and Usher.

The festival attracted 7,216 international tourists mainly from the Netherlands, the USA, Venezuela, Colombia, Aruba, and Suriname. The typical attendee was representative of Gen X, enjoying a high level of income and education. Their travel party size was 1.73 which was significantly lower than the previous year and they stayed for nearly a week at the host destination. Nearly one out of four attendees were single and female, which reveals that the festival has a strong appeal to this specific lifestyle segment.

Most respondents were reasonably familiar with Curaçao as a tourist destination; but, for nearly three out of four respondents, the CNSJF was the primary reason for their visit to Curaçao. Half of the respondents attended the festival before revealing strong loyalty to the festival. Respondents were clearly pleased with their experiences at both the CNSJF and the host destination. Satisfaction and behavioral intentions to recommend CNSJF and Curaçao to others was also strong.

The spending per person per trip exceeded last year's spending by more than US\$600 per trip, amounting for a total spending of US\$2,155.00. The spending per day per person was US\$311. Last year's respondents reported spending US\$254 per day, which means that spending this year surpassed the year before by 22.5%. This year's spending exceeded the spending per day per person of a typical tourist visiting Curacao by more than three times.

Hotels and restaurants captured almost half of total attendees' spending. Compared to the previous year, spending in hotels increased by 69%, while spending in restaurants swelled by an immense 85.4%. The other two categories that also benefited the most were car rentals and nightlife, where spending per trip per person was US\$183 and US\$176 respectively. Spending in hotels, restaurants, car rentals, and nightlife soared by the highest amounts compared to the previous years.



The increase in spending may be attributed to the festivals' high satisfaction level, the smaller travel party size, and longer stays. Nearly ninety-five percent of respondents were satisfied with the festival, while nine out of ten respondents reported a desire to return to the festival and to recommend it to anyone who asks. The festival was able to increase the attendees' length of stay by nearly one week. This was due to the extension of the concert nights from two to three, as well as to the staging of multiple events outside the festival.

The substantial spending surge spawned significant spillovers into the local economy. The total direct impact was US\$8.7 million, while the total indirect spending was US\$7.2 million for a total economic impact of US\$15.9 million. This year's total economic contribution surpassed last year's contribution by US\$1.5 million. Due to the lack of household income data, Curaçao's economic model does not allow for the inclusion of the festival's induced effects. Had this data been available, the economic impact would have been much higher.

The highlight of this year's festival is the seeming convergence between the festival and the host destination. The report last year expressed concern that "The ongoing and growing mismatch between the value of the festival and the value of the destination is endangering the viability of the festival." More events outside of the festival have been staged this year, such as the Punda Downtown Jazz Festival, the multiple hotel after parties, and events at local cafes. Stakeholders other than the festival organizer have realized that for the CNSJF to stay sustainable over time more entertainment opportunities that blend with the festival should be developed.

The festival has finally been able to change the perceptions regarding the host destination as is revealed by visitors' intentions to return to the host destination. For example, nearly 60% of respondents positively answered the question, "If the festival did not occur, would you still come to Curaçao?" Blending offerings that are staged outside the festival provides the host destination with the opportunity to take advantage of the economics that unique enterprises may bring. This, then, may enhance the destination brand with creative initiatives beyond that of sun, sand, and sea and into "beautiful nights in Curacao."

Though it is hopeful that we are seeing signs of convergence between the festival and the host destination through the initial offerings, the efforts for this convergence are only surfacing. However, while signs of convergence between the destination and the festival are evident it is important for all stakeholders to maintain rigorous strides in order to fully align the high quality of the festival to that of the destination.

# PURPOSE OF THE STUDY

The Director and Founder of Fundashon Bon Intenshon (FBI), Mr. Gregory Elias, commissioned the Dick Pope Sr. Institute for Tourism Studies (DPITS) of the Rosen College of Hospitality Management at the University of Central Florida to conduct an economic impact study of the Curacao North Sea Jazz Festival (CNSJF). In addition, the study assessed visitors' experience at the festival, as well as their experience while visiting Curaçao. Assessing visitors' experience beyond the festival to specifically include the host destination is original in its incorporation into this study. That is, the process of determining the economic impact gave rise to a lucrative opportunity to address visitors' experience beyond the festival to specifically include the host destination was done for the first time.

The CNSJF has been sponsored and organized by FBI, a local foundation established in Curaçao. The foundation signed an exclusive contract with Mojo Concerts, the owner of the North Sea Jazz Festival brand, for the production of a music festival in Curaçao. Mojo is one of the largest event organizers in the Netherlands and is a member of the American conglomerate, Live Nation Entertainment Inc. Live Nation Entertainment is one of the world's leaders in the production and marketing of events.

The mission of FBI is "to put Curaçao tourism at the forefront of the international arena". The FBI has been effective in realizing its mission. It has received significant international media attention and has crafted a positive image in the minds of repeat tourists, as well as potential tourists who have not yet visited the island. The festival has also spawned significant economic impact to the local tourist sector and the economy at large.<sup>i</sup> Finally, for the first time, festival attendees perceive Curacao to be a worthwhile destination to visit – even without the festival.

This study provides valuable insights regarding the attendees' festival experience, and how this impacts their future intentions to revisit the festival and the island. Since live music is an "experience good," demand is dependent on the attendees' expected utility. Therefore, the measurement reflects the benefits and experience during and after the consumption of the festival and the host destination. The study also estimates the economic benefits for Curaçao via analyses of festival attendees' spending. Moreover, it offers germane information for the organizer in terms of understanding the event and its audiences. This could allow the organizer to develop and improve marketing efforts, create new product offerings, nurture existing partnerships, and foster new relationships. Finally, the report contemplates the meaning of the festival to the local community, emphasizing value creation, potential development, and branding of the destination.



# A GLIMPSE INTO THE 2015 CNSJF

The CNSJF was held at the World Trade Center in Curaçao on September 3-5, 2015, marking the 6th annual CNSJF. This year's festival offered, similar to the previous year, a unique promotion with one free admission to a show on Thursday night (September 3) featuring Juanes and Oscar de Leon. While a large crowd appreciated the free concert, its analysis was not enveloped in the study. Only the music events that were presented on Friday and Saturday (September 4-5, are included in the study.

The excitement that attendees revealed regarding the festival seems to have extended for the first time beyond the festival's boundaries thus eliciting excitement for the island as a destination. The excitement for Curaçao as a destination is in stark contrast to "the disconnect" experienced between the festival and the destination in previous years. That is, the 2014 report expressed its concern that "a disconnect between the quality and positive experiences of the festival was not matched by what the wider destination has to offer".<sup>ii</sup>

The warning that the disconnect could render the continuation of the festival in Curaçao unsustainable seems to have been effective: the festival and the host destination are finally beginning to connect as one! For example, nearly five out of ten respondents reported that, in terms of their future intentions, they would visit Curaçao regardless of the occurrence of the festival. This favorable commentary on the destination seems associated with a host of ancillary events that took place outside of the festival perimeter in the days before and during the festival. For example, the Punda Jazz Fest had two nights of music events leading to the CNSJF,<sup>iii</sup> and several hotels hosted after parties.

A further example is revealed in the personal experiences of the DPITS researchers who witnessed taxi drivers engaging in conversations with visitors about the CNSJF, encouraging them to visit the festival. It seems that, finally, the host destination stakeholders other than the festival organizers are grasping "the connect" value over "the disconnect" danger by facilitating the creation of a destination-large ambience that enhances the experience of festival attendees both at and outside the festival!

The festival attracted 7,216 international tourists mainly from the Netherlands, the USA, Venezuela, Colombia, Aruba, and Suriname. This indicates 337 fewer tourists than the previous year. However, their spending exceeded last year's spending by more than US\$600 per trip spawning significant spillovers into the local economy. Again, attendees came to hear a first class line-up of music performers such as Grammy Award-winning singer-songwriters John Legend and Lionel Ritchie, R&B legends The Isley Brothers, Grammy-winning star jazz vocalist Cassandra Wilson, Enrique Iglesias, and Usher.



The festival has become the crown jewel of the Curaçao tourism industry and has opened the door for the island to promote itself as the destination that “owns the nights in the Caribbean.” In other words, Curaçao has the opportunity by way of the festival to fulfill the tourists’ nightlife better than any other sun, sand, and sea destination in the Caribbean.



# THE SURVEY

The study applied a survey instrument to acquire information from respondents and to gauge their perceptions of the experience at and outside the event, their behavioral intentions, and their spending behavior. The survey design emanated from a theoretical framework founded on “the experience economy” that reflects the overall experience at the music festival and the host destination.<sup>iv</sup> This framework is relevant in assessing the offerings for event attendees, as a means to gauge the satisfaction level of attendees, and in providing an understanding of attendees’ decision-making processes.

The survey contained predictors relevant to a music festival and music consumption. It included a total of five sections, and consisted of six fewer questions compared to 2014 for a total of 23 questions. The survey queried how attendees evaluate their experience at the festival as well as the host destination, isolated their demographic profile, identified their satisfaction levels, discovered whether they will return or provide a referral (behavioral characteristics) to prospective attendees; and, finally, it ascertained how much they spend at the festival.

Measuring seven major dimensions gauged the festival experience: hedonic value, enjoyment, memory, excellence, escapism, preference and economic value. Overall, these six experience categories were measured using 13 specific items. The previous survey (2014) consisted of ten major dimensions, of which six dimensions were identical to the 2015 survey with the exception of entertainment, visual appeal, efficiency and cultural value. Entertainment, visual appeal, and efficiency were demonstrated *ad nauseam* by previous surveys. Cultural value was replaced with explicit questions regarding respondents’ experience with the destination. The latter set of questions were deemed necessary in order to measure directly whether the festival and the destination were connected in respondents’ experience and perceptions.

The survey included three new categories of questions in order to examine whether the festival was able to connect with the destination in the mind of the festival’s attendees. One group of questions was specifically about the experience at the host destination, which is distinct from the experience at the festival. The same ten items that were used to measure the experience at the festival were applied to gauge the experience at the destination. For example, “Attending the festival *‘gets me away from it all’*” was also posed to respondents when querying about their experience in Curaçao, “Being in Curaçao *‘gets me away from it all’*.” The other group of questions was related to behavioral intentions (loyalty), while the last group posed the question: “If the festival did not occur, would you still come to Curaçao this weekend?”



The survey instrument allowed for an exploration of causal relationships. The assessments of the experience are the result of multi-dimensional interactions amongst a number of variables that are rated by the festival attendees. The questions related to the spending behavior of the respondents were aimed at estimating the economic impact that spending had on the island. Satisfaction is measured by an overall mean. Crucial in the analysis is the separation or identification of respondents who specifically visit Curaçao to attend the CNSJF from those that come for other purposes.

Since 2012, a question regarding respondents' marital status was included in the survey. The inclusion of this question is due to observations made at other festivals of the growing significance of newly emerging market segments, "Solo Dwellers" and female participants. A "Solo Dweller" is described as a festival attendee who currently lives by himself/herself. Whether an individual is married, single, divorced, or widowed has become an important variable in demographic segmentation for marketing purposes. Failure to pay special attention to this new phenomenon as observed at other festivals could underestimate and undervalue these segments, thereby missing the opportunity to understand and maximize the presence of these segments at future editions of the festival.



# DATA COLLECTION

**D**ata collection involved the polling of tourists. Curaçao residents were not surveyed. Data collection took place on Friday and Saturday, September 4<sup>th</sup> and 5<sup>th</sup>, (data collection did not take place on Thursday during the free concert) at key locations during the festival, e.g. near the concession stands, resting areas, and exit areas. In order to ensure a random sampling of attendees, the survey was conducted on both days of the festival from different positions at the festival site. Survey participants received a souvenir (baggage nametags) from the Curaçao Tourism Board (CTB).

Members of the DPITS trained the CTB data collectors on proper data collection and on conducting the survey. The training took place at the CTB offices on September 3, 2015. Those involved in the data collection included the following: two supervisors from the DPITS (during both nights), one supervisor from the CTB (during both nights), and a group of 11 data collectors from the CTB who conducted the surveys. Ten out of the eleven data collectors were seasoned data collectors who have been involved with the data collection process for all six editions of the festival. A total of 491 usable surveys were collected: 200 surveys were collected on day 1 and 291 on day 2. The 491 surveys represent 6.8% of the total tourist population attending the festival.<sup>v</sup>

At the end of each day, the supervisors counted and numbered all of the surveys collected. In order to ensure the sample was representative, the supervisors also evaluated the respondents' country of origin and validated the count with the ticket sales in those countries in order to ensure participation from all tourists. The week following the event, the data collectors entered the survey information into a web-based database developed by the DPITS. Once all the data was entered, the researchers from the DPITS evaluated the data to search for duplicates, data entry errors, and any incomplete and/or missing information.

# TICKET SALES: A REVIEW

**7**,216 international visitors bought tickets for this year’s event, of which 6,152 came to Curaçao for the sole purpose of attending the festival. Another 1,064 came to Curaçao for purposes other than the festival. Seventy-three percent of respondents (73%) indicated that they visited the destination for the sole purpose of attending the festival. The overwhelming percentage of international visitors who reported that they visited Curaçao for the festival has shown a consistent pattern over its six-year tenure (see Table 1 and 2). This high proportion is an indication of the festival’s popularity in the international market.

**Table 1 Attendees and ticket sales**

<b>Festival Attendees</b>	<b>Tourists</b>	<b>Tickets</b>
Main purpose 1 day	1,257	1,257
Main purpose 2 days	3,639	7,278
Other purpose 1 day	1,256	1,256
Other purpose 2 days	1,064	2,128
<b>Total</b>	<b>7,216</b>	<b>11,919</b>

**Table 2 Purpose of the trip**

<b>Purpose of Trip</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>
Main Purpose CNSJF	84%	85%	85%	79%	86%	73%
Other Purposes	16%	15%	15%	21%	14%	27%

Ticket sales revealed a different pattern this year compared to the previous year. Two distinct phases in ticket sales are discernable. The first phase reveals sales between six and three months prior to the festival. In 2014, 39% of the tickets were sold during that time span, while this year only 23% of tickets were sold. Anticipation and excitement to attend the festival was lower this year compared to 2014. Only 5% of advance tickets were sold six plus months prior to the festival. Last year, eleven percent (11%) of the tickets were sold six months in advance. The drop in ticket sales during this time frame may be due the late announcement of the performers’ line-up compared to the previous year.

On the other hand, phase two reveals that nearly half of advance tickets (46%) were sold between the three months and two weeks leading to the festival. The previous year sold 37% of tickets during the same time span. These patterns are revealed in Table 3. However, overall, the festival continues with its strong advance festival commitment. Sixty-nine percent (69%) of all tickets were purchased one to six months prior to the



festival compared to 65% the year before. An opportunity exists to smooth out ticket sales from month 3 to 2 weeks prior to the festival, thereby modifying the steepness in the S-shape booking window, as revealed in Table 3.

**Table 3 Reservation window (all tourists)**

Reservation	2010	2011	2012	2013	2014	2015
>1 week	35%	11%	6%	11%	18%	19%
1-2 Weeks	19%	7%	8%	8%	6%	12%
2-4 weeks	12%	21%	12%	21%	11%	19%
1-3 months	21%	28%	33%	38%	26%	27%
3-6 months	11%	28%	31%	15%	28%	18%
6 + months	1%	4%	10%	7%	11%	5%

It is noteworthy to document the booking behaviors of first-time festival attendees versus repeat festival attendees. The booking behavior of repeat attendees seems to indicate that they are more committed to the festival when compared to the commitment of first-timers. Sixty-four percent (64%) of the repeat attendees booked their tickets one month or more prior to the festival, while 44% of first-timers booked their tickets during that time frame. However, first-timers seemed more excited as the festival drew nearer in time. This is evidenced by a trend in their booking behavior where nearly one out of four first-timers bought their tickets less than a week prior to the festival, as compared to only 12% of repeat attendees.

Visitor booking behaviors were also patterned differently across the various source countries.” For example, differences were observed in terms of the advance purchase of festival tickets. Nearly half of the respondents from Aruba and Venezuela bought their tickets in the last two weeks prior to the festival, while more than half of the respondents from the Netherlands and the USA bought their tickets three months or more prior to the festival. Differences in booking behavior could be the result of the intensity of the commitment to the festival. Or it is possible that people are buying tickets earlier in various regions due to cheaper flight costs for booking early.

# TOURIST PROFILE: A REVIEW

Respondents' demographic characteristics have generally remained unchanged as compared to the previous five years in terms of age, education level, and income. For example, the average age of the respondents was 45 years old; almost 80% had at least a college degree, and 56% earned more than US\$50,000 per year.

**Table 4 Demographic profile**

Tourists	2010	2011	2012	2013	2014	2015
<b>Education</b>						
High School	10.90%	17.30%	15.30%	18.44%	16.50%	20.20%
Undergraduate Degree	49.30%	43.10%	40.30%	39.39%	37.00%	30.20%
Master/Doctorate	39.70%	36.40%	44.50%	42.18%	46.40%	49.60%
<b>Salary</b>						
Less than US\$25,000	11.8%	5.9%	5.6%	8.1%	6.8%	9.8%
US\$25,000-US\$29,999	13.5%	2.3%	8.4%	6.2%	7.5%	6.6%
US\$30,000-US\$39,999	11.8%	10.1%	9.3%	13.2%	12.6%	15.8%
US\$40,000-US\$49,999	10.1%	27.6%	17.3%	16.9%	12.3%	12.3%
US\$50,000-US\$74,999	10.1%	24.8%	21.5%	22.7%	24.9%	14.6%
US\$75,000-US\$99,999	22.0%	14.2%	16.8%	20.9%	18.8%	22.2%
US\$100,000 & over	20.3%	14.7%	21.0%	12.1%	17.1%	18.7%
<b>Age</b>						
Average Age (years)	45.5	45.7	44.9	44.0	44.0	45.5
<b>Gender</b>						
Male	53.00%	49.30%	37.60%	40.86%	49.50%	40.50%
Female	47.00%	53.60%	62.40%	59.14%	50.50%	59.50%

The profile of respondents has remained steady compared to last year in three distinct ways. First, there is a strong singles presence (50%) at the festival; second, there is an increasing trend of repeat attendees (50%) at the festival; and third, regional markets consisting of Aruba, Colombia, Venezuela and Suriname have remained strong and account for 64% of total markets.

**Table 5 Relationship status**

Relationship status (all tourists)	2012	2013	2014	2015
Single	51.60%	51%	53%	50%
Married	48.40%	49%	47%	50%





Half of the respondents were single (50%) and more than two out of ten (22%) live alone. Two out of ten singles are living with others. In other words, almost half of singles attending the festival live alone. Females comprise the largest portion within this segment. Nearly two-thirds (65.7%) of those living alone were females. Respondents who reported being single and living alone are mainly from Suriname (30%), the USA (26%) and Aruba (24%). Respondents from the Netherlands revealed the lowest frequency in this category (12.7%). This segment of 'single female living alone' corresponds to the growing preference of the younger generation to live alone as a lifestyle.<sup>vi</sup> Indeed, the consumption of events and festivals appears to have become a preferable social practice by social dwellers in the network society.

**Table 6 Living arrangements**

<b>Relationship status (all tourists)</b>	<b>2015</b>
Single living alone	22%
Single living with others	19%
Married	50%
Divorced	9%

There is a noticeable increase in the Dutch market compared to the previous year, growing from 20.5% in 2014 to 27.1% of the total market share. The Dutch market has reversed its declining trend in market share compared to previous years. However, it remains to be seen that the upward trend will sustain for the coming years. The Venezuelan/Colombian is the only market that is showing a steady increase over the years. This market increased from 20.5% of the market share in 2014 to 23.2% this year. The increase of this market is phenomenal revealing a positive trend of 158% increase since the inception of the festival.

**Table 7 Country of residence**

<b>Country</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>
United States	13.0%	8.0%	13.0%	11.0%	9.0%
Netherlands	39.0%	35.0%	22.0%	20.5%	27.1%
Venezuela/Colombia	9.0%	14.0%	19.0%	20.5%	23.2%
Surinam	9.0%	11.0%	9.0%	11.3%	9.8%
Aruba	5.0%	18.0%	12.0%	10.8%	9.6%
Other	26.0%	14.0%	25.0%	25.9%	21.3%



There are also clear differences among respondents from the main source markets. For example, respondents from the USA revealed the highest age with a mean of 52 years old, followed by respondents from the Netherlands averaging 50 years old. Respondents from Venezuela, Aruba and Suriname revealed an average age of 42 years old.

The average party size was 1.78, which is smaller than 2014 (2.39). Smaller party size may be a consequence of the increasing presence of singles due to lifestyle changes globally. These lifestyle changes have a large impact on festival attendance as singles are increasingly visiting festivals to socially interact with other people. In addition, smaller party size may have a larger impact on the local economy. Evidence from the literature suggests that people traveling by themselves or in smaller groups tend to spend more money at a destination.<sup>vii</sup>

**Table 8 Purpose of the trip (2010-2015)**

Purpose of Trip	2010	2011	2012	2013	2014	2015
Main Purpose CNSJF	84%	85%	85%	79%	86%	73%
Other Purposes	16%	15%	15%	21%	14%	27%

Seventy-three percent of respondents came to Curaçao for the sole purpose of attending the festival. This is the lowest percentage of tourists visiting the host destination for the sole purpose of attending the festival since its 2010 inception. Respondents from Suriname reported the highest incidence of visiting the host destination for the sole purpose of attending the festival (83%), while the Dutch respondents, followed by the USA, displayed the lowest frequency in terms of their main purpose to attend the festival. Table 9 displays the frequency of main purpose by country.

**Table 9 CNSJF main purpose by country**

Country	CNSJF Main Purpose
Surinam	83%
Bonaire	80%
Venezuela	79%
Colombia	77%
Other	75%
Aruba	70%
United States	68%
Netherlands	59%



The declining percentage of island visitors who state the festival as their main reason for traveling to the island may indicate a change in tourists' perceptions of the destination itself. In other words, the festival and the host destination appear to be converging in a manner that enhances the overall tourist experience - the result of which could be extended island stays. For example, more than two-thirds (69%) of respondents have visited the host destination before, and more than one-third of these respondents have attended the festival four times.

**Table 10 Number of previous visits to the CNSJF**

<b>Number of previous visits to the CNSJF</b>	<b>%</b>
First Time	50%
2nd time	16%
3rd time	13%
4th time	9%
5th time	8%
6th time	4%



# CHANGING PERCEPTIONS

As indicated previously, the study followed the same experiential consumption framework as the year before. Applying the same framework enables comparison of the festival’s experiential consumption between two years, which facilitates the detection of patterns, and trends.

The experiential framework is centered on experiential consumption theories. The main premise of these theories is that people are in search of unique, memorable, and extraordinary experiences. Experiential aspects of a music festival are regarded as more important than the pure music content of the festival. In other words, while the music content is an important factor to consider, other aspects such as emotions, socialization, fun, and escapism may be shaping the behavior of attendees at the festival.

The actual product at a music festival is the artists’ performance, while experience is defined as escaping from everyday life, engaging in sensory pleasure, and fostering an increased measure of memory. This study based its investigation on such fundamental dimensions of experience as they pertain to a music festival that provides escapism, enjoyment, economic value, memory, hedonism, preference and excellence.

These seven dimensions are conceptualized with 10 experiential items and were rated with a seven point Likert scale ranging from 1 completely disagree to 7 completely agree. For example, if a respondent completely agreed with the statement “*I am in another world*”, the respondent would score 7 on the Likert scale. The scores in Table 11 reveal the strong positive feelings and perceptions regarding all the items investigated. For example, the hedonic dimension measured by “*I am thrilled about my experience*” scored a mean 6.06. Seventy-three percent of respondents strongly agreed or agreed with this statement.

Table 11 Tourists experience (Curacao vs. CNSJF)

Travel Experience (Festival vs. Curaçao)	Festival	Curaçao	sig.
“Gets me away from it all”	5.89	5.91	p>.001
Makes me feel like I am in another world	5.77	5.85	p>.001
I get so involved I forget everything else	5.64	5.66	p>.001
<b>Prices are a good economic value</b>	<b>5.22</b>	<b>5.48</b>	<b>p&lt;.001</b>
<b>Overall, I am happy with prices</b>	<b>5.24</b>	<b>5.47</b>	<b>p&lt;.001</b>
Superior value in comparison to other	5.54	5.49	p>.001
Will be my first preference	5.55	5.48	p>.001
I will have wonderful memories	6.06	6.04	p>.001
I will remember many positive things	6.16	6.09	p>.001
I am thrilled about my experience	6.06	6.04	p>.001

The highest mean score was 6.16 and corresponded to the dimension memory measured by the “*I will remember many positive things.*” Seventy-seven percent of respondents



strongly agreed or agreed with this statement. The lowest mean score for the festival pertains to the dimension of economic value, measured by “Prices are a good economic value,” which scored a mean of 5.22. Only half of the respondents strongly agreed or agreed with this statement.

Up until this year, the CNSJF had been unable to migrate its positive image and brand to the host destination. The CNSJF did not appear to marshal enough capacity to create positive perceptions of the destination as revealed by the low likelihood of respondents to visit the destination in the future. The apparent causes of this disconnect were thoroughly discussed in the 2014 report.<sup>viii</sup>

This disconnect prompted a shift in the study’s research approach to investigate in-depth the notion that this music festival could play a role in developing positive perceptions of the host destination. Consequently, this year’s study specifically investigated the perceptions that were believed to influence the behavioral intentions of respondents toward the host destination and toward the music festival. Evidence suggests that consumption experience can influence these perceptions toward the destination. This means that the experience at the festival as well as the host destination during the festival can influence the perceptions of the destination that attendees maintain after their Curacao experience.

The results indicate that, based on their levels of previous visitation(s) to Curaçao, most respondents were reasonably familiar with Curaçao as a tourist destination; but, for nearly three out of four respondents the CNSJF was the primary reason for their visit to Curaçao. Respondents were clearly pleased with their experiences at both the CNSJF and the host destination. Satisfaction and behavioral intentions to recommend CNSJF and Curaçao to others were also strong.

On the 7-point Likert scales, the mean rating for overall satisfaction with the festival was 6.18, and the mean rating for satisfaction with Curaçao as a tourist destination was 6.22. The correlation between overall satisfaction with the festival and overall satisfaction with Curaçao as a tourist destination was 0.574, which was statistically significant ( $p < 0.1$ , two-tailed). The correlation between intentions to recommend the festival and Curaçao was 0.570, which was also statistically significant ( $p < 0.1$ , two-tailed). On the 7-point Likert scales, the mean rating for intentions to recommend the festival was 6.36, and the mean rating for intentions to recommend Curaçao as a tourist destination was 6.31.

In order to further examine perceptions of the host destination as a result of attending the festival, the study used pairwise variables in 14 areas. These areas are economic value,



escapism (revealed in three variables), memorable experience (revealed in two variables), satisfaction, preferences, intention to return, electronic word of mouth, recommending the festival, and hedonistic experience (each revealed through one variable). Each variable was measured in two contexts: one in the context of the host destination (Curaçao) and the other in the context of the CNSJF. Examining each variable separately in each context facilitated the investigation of potential gaps in the above-mentioned factors.

In order to estimate the perception gap between the host destination and the festival, the study proceeded as follows. The host destination was considered the comparison benchmark. The gap was estimated by subtracting the values pertaining to the variables for the festival from the same variables pertaining to the host destination. Positive values indicate that respondents perceived that the host destination outperformed the festival in a specific area. Negative values indicate that respondents perceived that the festival outperformed the host destination in a specific area, and zero indicates that there is no difference in performance between the host destination and the festival. One sample t-test was employed to investigate if there is any difference in the value of the gap.

The results of the t-tests show that, except for three variables, all other variables failed to reveal significant differences between the host destination and the festival. This means that the festival has finally been able to create positive perceptions of the host destination, which seems likely to be associated with positive behavioral intentions to visit the host destination in the future. This likely association demonstrates the power that festival attendance has on perceptions of the host destination.

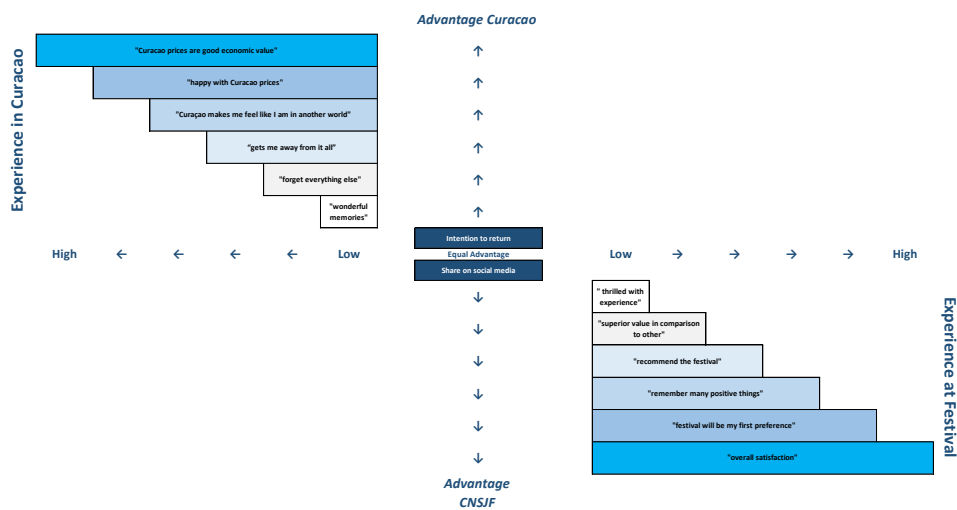
However, there are three variables that revealed significant differences between the festival and the host destination. These variables are “*prices are a good economic value*,” “*I am happy with the prices*,” and “*overall satisfaction*.” With regard to “*prices are a good economic value*” ( $M=0.26$ ,  $SD=1.472$ ), the host destination significantly outperformed the festival ( $t(492)=3.855$ ,  $p<0.001$ ). Similarly, the host destination outperformed the festival with regard to “*I am happy with the prices*”, ( $M=0.25$ ,  $SD=1.362$ ) with ( $t(492)=4.096$ ,  $p<0.001$ ). In contrast, the festival significantly outperformed the host destination ( $t(492)=-2.003$ ,  $p=0.046$ ) in terms of overall satisfaction ( $M=-0.08$ ,  $SD=0.909$ ).

In order to confirm the results, the data matrix was transposed to conduct a Friedman test.<sup>ix</sup> A Friedman test was utilized to confirm or disconfirm the difference in the mean value of gaps among respondents. The results of the Friedman test show that there are significant differences in mean ranks of the variables confirming the results that respondents perceived economic values one and two at the host destination more



favorably than at the festival, while respondents were more pleased with the festival than with the host destination ( $\chi^2(13) = 86.025, p < 0.001$ ).

**Figure 1 Data matrix (destination and festival)**



It is only natural that prices at the host destination are perceived more positively than those at the festival because respondents tend to buy products and services separately at multiple sites and therefore have only a scattered recollection of prices at the destination. However, when at the festival, respondents purchase products at one place only and their recollection reveals price points that are only from that particular place. These price points include food and beverages as well as the ticket price, which together amount to a significant sum. The differences in economic value do not hinder a closer synergy between the festival and the host destination. Also, the fact that respondents were more pleased with the festival than the destination means that the festival remains an important attraction within the host destination. Finally, another indication that the festival has finally been able to change the perceptions regarding the host destination is revealed by visitors' intentions to return to the host destination. For example, nearly 50% of respondents positively answered the question "If the festival did not occur, would you still come to Curaçao?" This finding is relevant for destination managers and marketers as the notion that the CNSJF plays a role in developing positive perceptions of host destinations has, in the past, not been corroborated.

# ECONOMIC CONTRIBUTION

**A**ttendees to a festival spend money at multiple business establishments while at the host destinations. They may eat at a local restaurant, fill up their car with gas, pay for parking, buy souvenirs, or even spend the night at a local hotel. Their presence at the festival represents incremental spending above and beyond what would be expected in the community if the event were not held. Attendees' spending spawns changes in sales, income, and jobs in businesses or agencies that receive event attendees' spending directly or indirectly. Thus, the impact of a festival trickles down to many sectors of the local economy, and in turn, to residents and business owners.

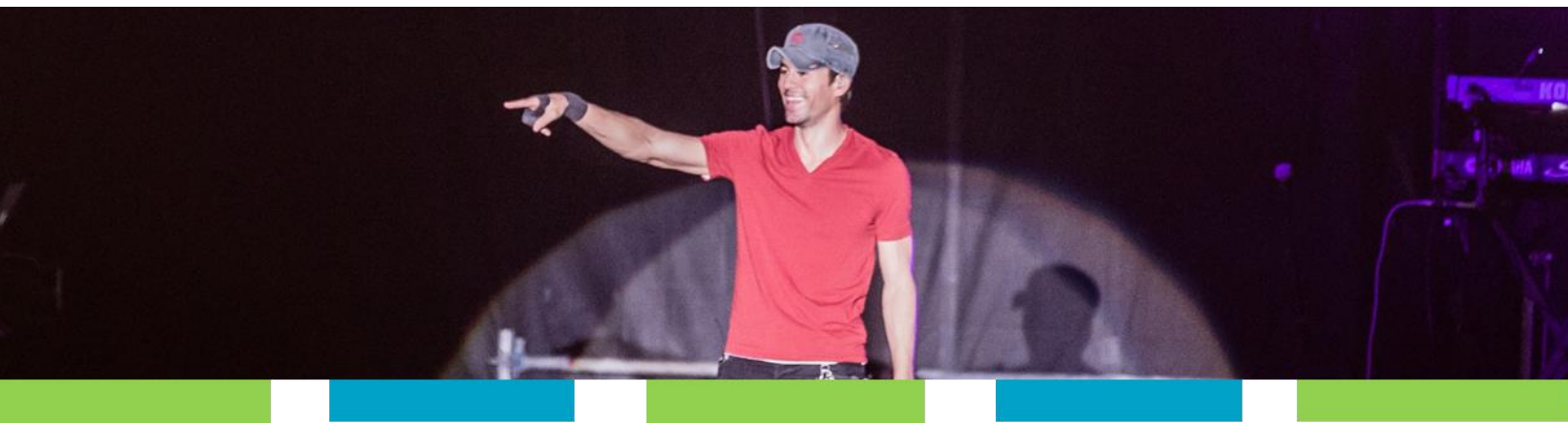
Three types of expenditures were analyzed in the case of the 2015 festival. First, the study assessed the expenditures related to the organization of the festival. Second, the study considered expenditures related to the spending of tourists whose main purpose for visiting the destination was to attend the festival. And, third, the study also captured expenditures of tourists whose main purpose for visiting the destination was something other than attending the festival. The study made the assumption that a portion of expenses of the organizers and attendees would leak outside of the local economy. That is, money that exits the local economy and do not remain in the local economy. For example, the organizer had to compensate the performers, pay for the North Sea Jazz license, and the Mojo organization.

The study applied a leakage factor of 0.308 and subtracted this fraction from the total direct spending from the festival organizers and the international attendees. The economic impact analysis for the CNSJF stemmed from the I-O model calibrated in the 2010 Report.<sup>x</sup>

The duration of stay is an important indication of the spending impact of tourism expenditures, and the stability of these expenditures in the industry (in particular the hotel industry). The average length of stay this year was 6.93. The festival has increased the duration of stay of international tourists by an average of 10.9% over the past five years. The 2015 festival continued with the steady growth in length of stay increasing at a pace higher (13.8%) than that of the past five years. The increase in length of stay may be attributed to the festival increasing the concert nights from two to three, including the free concert on Thursday.

The spending per trip this year saw a substantial increase from US\$1,545 in 2014 to US\$2,155, which is equivalent to a 39.5% increase. In other words, respondents reported that they spent US\$610.00 more per trip than in the previous year. This pattern indicates a steady increase in spending per trip over past festivals. Respondents reported that they spent US\$311 per day, which is an increase of US\$57 per day.





This is a clear reversal in the decline of spending per day that was documented last year. Last year's respondents reported spending US\$254 per day, which means that spending this year surpassed the year before by 22.5%.

Table 12 reveals the spending per category. Similar to previous years, the hotel and restaurant sectors were the sectors that most benefited from the festival. Respondents reported to have spent US\$752 per trip per person and US\$317 per trip per person in hotels and restaurants respectively. Compared to the previous year, spending in hotels increased by 69%, while spending in restaurants swelled by a whopping 85.4%. The other two categories that also benefited the most were car rentals and nightlife where spending per trip per person was US\$183 and US\$176 respectively. Spending in hotels, restaurants, car rentals, and nightlife soared by the highest amounts compared to the previous years.

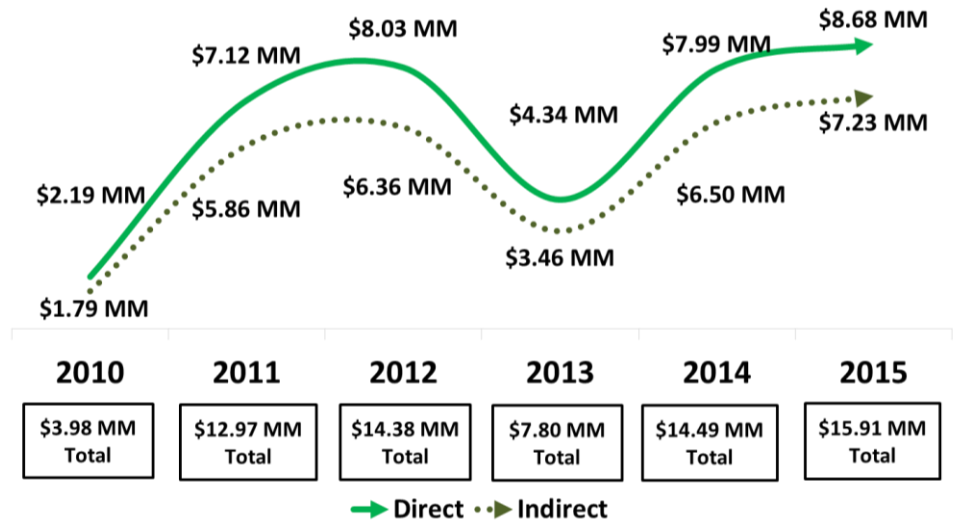
**Table 12 Spending per tourist (2010-2015)**

<b>Spending Category</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>
Tickets	\$219	\$333	\$342	\$234	\$324	\$349
Hotel(F&B)	\$184	\$393	\$515	\$447	\$445	\$752
F&B	\$64	\$168	\$164	\$149	\$171	\$317
Car Rental	\$39	\$139	\$138	\$161	\$144	\$183
Other	\$34	\$358	\$442	\$155	\$181	\$204
Nightlife	\$24	\$101	\$115	\$133	\$117	\$176
Gasoline	\$8	\$75	\$43	\$56	\$49	\$58
Taxi	\$5	\$62	\$43	\$44	\$61	\$60
Music CDs	\$1	\$36	\$12	\$3	\$21	\$18
Souvenirs	\$5	\$52	\$23	\$17	\$31	\$40
<b>Total</b>	<b>\$582</b>	<b>\$1,717</b>	<b>\$1,837</b>	<b>\$1,397</b>	<b>\$1,545</b>	<b>\$2,155</b>

The economic impact of the 2015 festival totaled US\$15.9 million. This total economic impact surpassed the previous year (US\$14.5 million) by 9.6%. This total contribution included US\$8.7 million of direct economic impact that resulted from the direct spending of international tourists while they were visiting the island, plus the amount of money spent by the festival organizer, and the money spent at the festival by tourists who did visit the host destination for another purpose other than the festival. The direct impact only references new money that entered and stayed in the local economy.



Figure 2 Total economic impact (2010-2015)



The direct spending of US\$8.7 million is slightly more than the 2012 festival (US\$8 million), which was the largest direct spending figure until the 2015 festival. The indirect effect of the 2015 festival totaled US\$7.2 million, which is again larger than all the previous years. Overall, the total economic contribution of this year’s festival had the largest impact on the total economy, surpassing the 2014 and the 2012 festivals by 9.7% and 10.4% respectively (see Figure 2).

The economic impact of this year’s festival is a conservative estimation of its economic effects. Induced effects were not included in the estimation. These effects are the money spent by recipient employees who spend their wages and income throughout the local economy. However, due to the lack of household income data, Curaçao’s economic model does not allow for the inclusion of the festival’s induced effects. Had this data been available, the economic impact would have been much higher.

Those international tourists who arrived to Curaçao with the sole intention to attend the festival spent US\$7.3 million, and their total economic contribution of this spending was US\$13.5 million. The international tourists who had other purposes for visiting Curaçao during the time of the festival spent US\$456,732 for a total economic contribution of US\$884,579. Finally, the organizer’s spending in the local economy totaled US\$923,484 for a total economic contribution of US\$1.5 million. The complete results are displayed in the in tables 13, 14, and 15).



**Table 13 Economic impact main purpose tourists**  
**Main Purpose Tourists**

Sectors	Direct Impact	Indirect Impact	Total Impact
Agriculture	\$0	\$455,099	\$455,099
Manufacturing	\$0	\$1,558,970	\$1,558,970
Utilities	\$0	\$648,755	\$648,755
Construction	\$0	\$119,324	\$119,324
Wholesale/Trade	\$885,325	\$0	\$885,325
Hotels-Restaurants	\$5,398,130	\$224,163	\$5,622,293
Transportation	\$1,017,859	\$565,556	\$1,583,415
Finance	\$0	\$1,451,047	\$1,451,047
Real Estate	\$0	\$572,852	\$572,852
Government	\$0	\$0	\$0
Education	\$0	\$19,253	\$19,253
Health	\$0	\$14,945	\$14,945
Other	\$0	\$610,683	\$610,683
<b>Totals</b>	<b>\$7,301,314</b>	<b>\$6,240,647</b>	<b>\$13,541,962</b>

**Table 14 Economic impact other tourists**  
**Other Purpose Tourists**

Sectors	Direct Impact	Indirect Impact	Total Impact
Agriculture	\$0	\$37,928	\$37,928
Manufacturing	\$0	\$115,397	\$115,397
Utilities	\$0	\$49,022	\$49,022
Construction	\$0	\$8,826	\$8,826
Wholesale/Trade	\$0	\$0	\$0
Hotels-Restaurants	\$456,732	\$14,099	\$470,831
Transportation	\$0	\$29,752	\$29,752
Finance	\$0	\$98,888	\$98,888
Real Estate	\$0	\$35,231	\$35,231
Government	\$0	\$0	\$0
Education	\$0	\$1,097	\$1,097
Health	\$0	\$775	\$775
Other	\$0	\$36,831	\$36,831
<b>Totals</b>	<b>\$456,732</b>	<b>\$427,847</b>	<b>\$884,579</b>



**Table 15 Economic impact festival organizers**  
**Festival Organizers**

<b>Sectors</b>	<b>Direct Impact</b>	<b>Indirect Impact</b>	<b>Total Impact</b>
Agriculture	\$0	\$25,826	\$25,826
Manufacturing	\$0	\$166,371	\$166,371
Utilities	\$0	\$26,283	\$26,283
Construction	\$379,700	\$14,800	\$394,500
Wholesale/Trade	\$53,193	\$0	\$53,193
Hotels-Restaurants	\$114,489	\$20,462	\$134,951
Transportation	\$338,042	\$69,258	\$407,300
Finance	\$0	\$112,843	\$112,843
Real Estate	\$38,060	\$60,003	\$98,063
Government	\$0	\$0	\$0
Education	\$0	\$2,361	\$2,361
Health	\$0	\$1,591	\$1,591
Other	\$0	\$62,560	\$62,560
<b>Totals</b>	<b>\$923,484</b>	<b>\$562,359</b>	<b>\$1,485,844</b>



# CONCLUSIONS

**F**our main conclusions stem from the 2015 CNSJF research results:

- 1) More focus is on providing value for money: for example, by providing added entertainment through offers such as the free concert.
- 2) The festival is consolidating itself as the marquee attraction at the destination.
- 3) The festival and the destination are closer than ever before.
- 4) More money is being spent by festival attendees, thereby spawning larger economic impacts.

## **Value for money**

The CNSJF has offered a free concert for festival attendees for the second consecutive year. This year's free concert featured Juanes and Oscar de Leon, and attracted close to 10,000 attendees. The free concert added value to the festival by including three instead of two nights of concerts, and did so without increasing the ticket price for attending the three nights' concerts. While the festival featured an impressive line-up with 25 top jazz performers seamlessly over three nights, the price per ticket for the whole festival remained US\$400.00. This price package was irrespective of whether the attendee experienced the two or three nights' festival.

A ticket per night normally costs US\$200.00; thus, by providing one free night's concert, the festival saves the attendee US\$200.00. For US\$400.00, a festival attendee could see performers that he/she might not otherwise experience at this price point. This saving is certainly a great bargain for festival attendees and works to make the CNSJF one of the best value festivals in the Caribbean.

This increase in value for money had the immediate effect of increasing the length of stay from a little over six nights to nearly seven nights, which added an important dimension to the attendees' trip characteristics. The impact of the longer stay was felt in the spending per day per person, as well in venues other than the festival.

## **The consolidation of the CNSJF as a marquee event**

No single event attracts as many tourists during a near week-long activity in Curacao as much as the festival does. The festival attracted 7,216 international tourists from mainly the Netherlands, the USA, Venezuela, Aruba, Colombia and Suriname. Half of the respondents were repeaters. This significant number of repeat visitors exposes the likelihood that a substantial number of people are highly satisfied with their festival experience. As the mean score on a seven point Likert scale exceeds six points, the implication is that a high level of satisfaction exists. Moreover, eighty percent would like to come back to the festival, while seventy-six percent would want to share their experience on social media.



Findings from previous CNSJF editions demonstrated the significant relationship between the level of the festival's satisfaction and such festival attributes as organization, facilities, and locals' friendliness. This year's study focused more on the experiential dimension of the consumption of the festival. The satisfaction level of respondents was very strong scoring 6.18 on a seven point Likert scale. Two dimensions may have prompted the festival's high satisfaction level: 1) the festival is an opportunity to escape from everyday life; 2) the festival is a source of spawning positive feelings and enduring memories. This opportunity to escape from a lifestyle characterized by a society whose nature is fraught with the pressure to achieve amid highly competitive circumstances is vividly compelling.

### **The festival and the destination are closer than ever before**

The most prominent finding at this year's festival is that events within the festival concerts have blended with events outside the festival. More events outside of the festival have been staged this year, such as the Punda Downtown Jazz Festival, the multiple hotel after parties, and local cafes. These activities are in stark contrast to previous years when there was a clear disconnect between the festival and activities outside the festival. Finally, stakeholders other than the festival organizers have realized that for the CNSJF to maintain its sustainability over time, destination offerings that enhance the experience of attendees should be merged compatibly with the festival concerts. Thus, a harmonious synergy could emerge more fruitfully for the benefit of the festival and the destination in its whole.

While we know that the performers' line-up entices people to visit Curacao, it is the degree of rich experiences that brings them back to the host destination. Creating experiences beyond those provided by the music facilitates the immersion into the local cultural landscape. This could ultimately make a festival such as the CNSJF sustainable over time. It seems that, finally, by organizing similar events of their own, local stakeholders have realized that they can take advantage of the considerable numbers of tourists who visit the island for the festival. These events could provide more opportunities for festival attendees to escape everyday life and to engage with friends, thereby enhancing their overall experience at the festival and the destination. With eight out of ten respondents reporting a desire to return to the festival, the power of the festival to induce repeat business is clear. As stakeholders continue to develop similar events to increase attendees' experiences, repeat business opportunities could continue as well.

The festival has finally been able to change the perceptions regarding the host destination and is revealed by visitors' intentions to return to the host destination. For example, nearly 50% of respondents positively answered the question "If the festival did not occur,



would you still come to Curaçao?” This finding is relevant for destination managers and marketers as the notion that the CNSJF plays a role in developing positive perceptions of host destinations has, in the past, not been corroborated.

### **The spectacular increase in spending**

The spending per person this year surpassed all expectations. Despite global economic uncertainty, respondents reported to have spent US\$610.00 more than the previous year per trip. Nearly half of this spending went to hotels and restaurants. This enormous increase in spending may be attributed to longer stays, smaller travel party size, and the satisfaction level of respondents. By staying longer, attendees had the opportunity to increase their immersion in destination activities beyond the festival. The presence of attendees at other activities and venues other than the festival was also noticed by local stakeholders.

The increase in spending per person per day was US\$ US\$311, which is an increase of US\$57 per day or 22.5% compared to last year’s edition. This is a clear reversal in the decline of spending per day that was documented last year. Last year’s respondents reported spending US\$254 per day. The spending per person per day is three times larger than the typical tourist spending per day per person when visiting Curacao. The total economic impact is nearly US\$16 million compared to US\$14.5 million in 2014, revealing the large economic spillovers to other sectors in the local economy.

The success of the festival is not only assessed through its economic prowess. Due to increased exposure, the extra attention gained by the destination as a direct result of the festival could reap greater economic benefits for the island in the future. The festival has definitely put Curaçao on the traveling music festival attendees’ map, and has qualified it as a week-long international tourist hotspot. The sustained success of the festival depends not only on enhancing the attendees’ experience at the festival, but also on the continued efforts to stage events outside the festival as a way to enhance the overall experience of attendees. Music attracts, but music on its own cannot ensure loyalty to the destination. The seeming convergence between the festival and the host destination beckons a harbinger for uniqueness and hence sustained success. However, while signs of convergence between the destination and the festival are evident it is important for all stakeholders to maintain rigorous strides in order to fully align the high quality of the festival to that of the destination.

# ENDNOTES:

<sup>i</sup> The economic impact is not only observed through the traditional forms of direct, indirect and induced effects, but also through a non-traditional representation of internationalization whereupon the destination is stimulated both on the foreign front through foreign exchange and through the backward economic linkages. See, for example, Rivera, M., Semrad, K. and Croes, R. (2015). The Internationalization benefits of a music festival: The case of the Curacao North Sea Jazz Festival. *Tourism Economics* (SSCI) DOI: <http://dx.doi.org/10.5367/te.2015.0485>.

<sup>ii</sup> Rivera, M., Croes, R., & Semrad, K. (2014). *The Curacao North Sea Jazz Festival: A lustrum churning economic and promotional opportunities for Curacao*. Dick Pope Sr. Institute for Tourism Studies: Orlando, FL.

<sup>iii</sup> See, for example, <http://www.curacaopartyguide.com/events/punda-jazz-fest-day-1/>.

<sup>iv</sup> Rivera, M., Semrad, K. and Croes, R. (2015). The five E's in festival experience in the context of Gen Y: Evidence from a small island destination. *Revista Española de Investigación en Marketing ESIC* (REIMKE), 19(2), 95-106.

<sup>v</sup> The sample size should be at least  $n=365$  for the population size of  $N=7162$  and a confidence interval of 95%. The current sample size of  $n=491$  in  $p=50\%$  increases, therefore, the estimation accuracy to  $\pm 4.27$ . See, for example, Krejcie, R. V., & Morgan, D. W. (1970). Determining sample size for research activities. *Educational and Psychological Measurement*, 30, 607-610.

<sup>vi</sup> For a discussion on the relevance of the female solo dwellers, see, for example, Klinenberg, E. (2010).

*Going solo, the extraordinary rise and surprising appeal of living alone*. The Penguin Press, New York.

<sup>vii</sup> Wang, Y., Rompf, P., Severt, D., and Peerapatdit, N. (2006). Examining and identifying the determinants of travel expenditure patterns. *International Journal of Tourism Research*, 8(5), 333-346.

<sup>viii</sup> Rivera, M., Croes, R., & Semrad, K. (2014). *The Curacao North Sea Jazz Festival: A lustrum churning economic and promotional opportunities for Curacao*. Dick Pope Sr. Institute for Tourism Studies: Orlando, FL.

<sup>ix</sup> The Friedman test is a non-parametric statistical test developed by the U.S. economist Milton Friedman. Similar to the parametric repeated measures ANOVA, it is used to detect differences in treatments across multiple test attempts.

<sup>x</sup> Croes, R., Rivera, M. & Semrad, K. (2010). *Uncovering the potential of a new more affluent and loyal market: the Curacao North Sea Jazz Festival*. Fundashon Bon Intenshon, Curacao.





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