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## Silver Springs Non-Visitor Study - 1985

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INTRODUCTION SILVER SPRINGS NON-VISITOR STUDY - 1985

Research Objectives

Methodology

Sampling

Quantitative Design and Data Analysis

Limitations

APPENDICES

# *THE DICK POPE, SR. INSTITUTE FOR TOURISM STUDIES*



*COLLEGE OF BUSINESS ADMINISTRATION  
THE UNIVERSITY OF CENTRAL FLORIDA  
ORLANDO, FLORIDA*

*TO FACILITATE THE INDUSTRY AND PUBLIC BY PROVIDING . . .  
\* RESEARCH \* PROMOTION \* EDUCATION \*  
IN THE STATE OF FLORIDA*

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SILVER SPRINGS NON-VISITOR STUDY - 1985

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SILVER SPRINGS

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## I. INTRODUCTION

This report presents the results of a survey of tourists vacationing in Florida who did not visit Silver Springs. This group will be labeled as "non-visitors" in the report. The survey was designed and administered by the Dick Pope, Sr. Institute for Tourism Studies, for Silver Springs management.

The "non-visitor" survey was designed to provide a database for Silver Springs management use in planning marketing and advertising programs. The primary objective was to explore non visitors' attitudes and preferences toward Florida's tourist attractions, including Silver Springs. In addition, the survey will develop demographic profiles of non visitors and explore their vacation travel patterns.

### A. Research Objectives

The research objectives of this survey include the following:

1. Obtain a demographic profile of current adult vacationers in Florida who do not visit Silver Springs. This database will allow tracking of non-visitors' demographic characteristics.
2. Measure non-visitors' awareness of Silver Springs, and explore their reasons for not visiting or planning to visit the park.
3. Measure non-visitors' perceptions of Silver Springs and its attractions, as well as their potential to visit it in the future.
4. Measure the impact of various advertising media on non-visitors' intention to visit Silver Springs.
5. Identify specific demographic groups that have distinguished perceptions and attitudes toward Silver Springs. This will be done in order to identify specific potential market segments for Silver Springs.



## II. METHODOLOGY

### A. Sampling

The populations sampled consisted of adult vacationers in Florida. Interviews were conducted during the weeks of June 7 - June 21, 1985. Data were collected from personal interviews, using structured questionnaires. While a reliable sample of tourist populations is difficult to obtain, specific procedures were followed to secure a reasonably representative sample of adult vacationers in Florida.

Trained interviewers were stationed at I-95 and I-75 on the Florida-Georgia border. Interviewers intercepted passers-by, prescreening on adult status, and completed a brief interview. Interviews were conducted throughout the daytime hours.

As the primary research objective was to interview Silver Springs non-visitors, a further screening of sample respondents eliminated those adults who had already visited or planned to visit Silver Springs.

The final sample was considered reasonably representative of the Florida tourists who were "non-visitors" to Silver Springs. Most of the adults agreeing to be interviewed had not visited nor planned to visit Silver Springs on this trip, and thus answered the entire questionnaire. A final usable sample of 201 respondents was obtained.

### B. Questionnaire Design and Data Analysis

Most of the questionnaire items were structured, with several open-ended items used to explore additional visitors' opinions and perceptions, as well as some of the reasons for not visiting Silver Springs. The questionnaire was designed to be completed within ten minutes.

Completed questionnaires were coded and the data analyzed at the

University of Central Florida. Frequency distributions were generated for all questions, as well as cross-tabulations and correlations with selected demographic and behavioral variables. The results are shown in the Findings section of the report.

### C. Limitations

Several limitations in the research methodology are noted here. The sample is restricted to adults interviewed during daytime hours in two locations: I-75 and I-95 on the Florida-Georgia border. While those locations are a practical choice because they contain a broad cross-section of tourists traveling to or from Florida's northern border, the interview site may not represent the broader Florida tourist market, notably tourists which arrive from the West (I-10) or by air to the numerous airports that serve north and Central Florida.

Further, the sampling is limited to a single tourist season, the beginning of summer 1985, which will not fully represent tourist populations in Florida throughout the year. This limitation should be noted when comparing the present tourist profiles with those generated from interviews during other seasons.

The open-ended questions as well as the questioning of tourists on their reasons for not visiting or not thinking to visit Silver Springs proved to be difficult to complete. To keep interviews brief and to minimize problems of respondent fatigue, probing on the open-ended questions was minimized.

Finally, most questions relate to behavior intentions of the respondents rather than actual behavior; that is, those respondents who reported willingness to visit Silver Springs, would not necessarily translate it to actual behavior.



TABLE III. FINDINGS

A. Demographic Profile of the Adult Non-Visitor

The primary purpose of measuring demographic characteristics of Florida tourists is to establish benchmark profiles. These data are useful for tracking tourist profiles over time. Additionally, it is insightful to compare demographic profiles of tourist non-visitors with visitors to Silver Springs. In this section, demographic characteristics of adult tourists visiting Florida are discussed for the total sample.

1. Age of respondent. The sample data suggest that adult non-visitors are primarily younger to middle-age adults. Over fifty percent of the sample are in the over 50 age group; 28.4 percent are in the 50-64 age group (Table 1). Note that only adult tourists were interviewed.

TABLE 1: AGE OF RESPONDENT

<u>Age Group</u>	<u>%</u>
18-34	28.4
35-49	19.9
50-64	28.4
OVER 65	<u>23.4</u>
	100.0
Total Sample Size	(201)

2. Sex and marital status of respondent. The total sample was not evenly divided between male and female respondents (Table 2). This is probably due higher response rate among males in a personal interview. Most respondents (76.6%) were married (Table 3).



TABLE 2: SEX OF RESPONDENT

	<u>%</u>
Male	65.5
Female	<u>34.5</u>
	100.0

TABLE 3: MARITAL STATUS OF RESPONDENT

	<u>%</u>
Married	76.6
Unmarried	<u>23.4</u>
	100.0

3. Household composition of the respondent. The majority of the respondents (87.6%) lived in households where more than two persons lived in (Table 4). In addition, 68.2% of the respondents said that there were no children under the age of 18 living in their household (Table 5). This profile is consistent with the age groups of "non-visitors" to Silver Springs discussed earlier.

TABLE 4: NUMBER OF PERSONS LIVING IN HOUSEHOLD

<u>Number</u>	<u>%</u>
1	12.4
2	45.3
3	17.4
4	19.4
5	3.5
6	1.5
7	<u>.5</u>
	100.0

TABLE 5: NUMBER OF CHILDREN UNDER 18 LIVING IN HOUSEHOLD

<u>Number</u>	<u>%</u>
0	68.2
1	15.9
2	12.4
3	2.5
4	.5
8	.5
	<u>100.0</u>

e. Household income. The non-visitor sample represented a broad range of household incomes. Over 15 percent reported less than \$15,000 annual household income, while another 10 percent report annual income over \$50,000. The median income was between \$25,000-\$50,000 a year.

TABLE 6: HOUSEHOLD INCOME

<u>Income</u>	<u>%</u>
Under \$15,000	15.9
\$15-\$25,000	30.3
\$25-\$50,000	41.3
Over \$50,000	10.0
refused	<u>2.5</u>
	100%

#### B. Major Tourist Attractions Previously Visited

Respondents were asked if they had previously visited any of the major commercial attractions in the Central Florida area. Results are shown in Table 7. As expected, the Walt Disney World attractions ranked first,



attracting a large proportion of the respondents. None of the respondents indicated Silver Springs, since they would not be under the category of "non-visitors".

TABLE 7: MAJOR TOURIST ATTRACTIONS PREVIOUSLY VISITED\*

<u>Attraction</u>	<u>Visited %</u>
Disney - Magic Kingdom	62.2
Disney - EPCOT	52.5
Busch Gardens	48.8
Sea World	42.3
Kennedy Space Center	37.8
Cypress Gardens	29.9
Circus World	18.4
Church Street Station	4.0
Wet and Wild	3.5
Other	15.9

\*Percentages exceed 100% due to multiple responses

### C. Non-Visitors' Awareness and Perception of Silver Springs

This section reports survey findings on how non-visitors were aware of and perceived Silver Springs.

#### 1. Familiarity with Silver Springs.

Almost half of the respondents were unfamiliar with Silver Springs (47.2%). Only 7.5% were very familiar with the park. (Table 8)

TABLE 8: FAMILIARITY WITH SILVER SPRINGS.

	<u>%</u>
Unfamiliar	47.2
Somewhat Familiar	45.2
Very Familiar	<u>7.5</u>
	100.0

## 2. Perception of Silver Springs' Attractions

The majority of the respondents perceived Silver Springs to be a water attraction park (46.3%) followed by Glass bottom boats (34%) and fish and marinelife attraction (33%). Only 10% of the respondents perceived Silver Springs to be a botanical garden.

TABLE 9: PERCEPTION OF SILVER SPRINGS' ATTRACTIONS\*

<u>Perceived Attraction</u>	<u>%</u>
A water attraction park	46%
Glass bottom boats	34%
Fish, marine life park	33%
Zoological gardens	30%
Don't know	24%
Boat rides	14%
Alligator farm	12%
Botanical gardens	10%

\*Percentages exceed 100% due to multiple responses

## 3. Perception of admission price and distance from Orlando.

The average perceived admission fee was between \$6-\$8. Almost 10% of the respondents thought that the admission to Silver Springs is free, while 10.5% perceived the admission fee correctly (Table 10).

Most respondents perceived the distance of Silver Springs from Orlando correctly. The average perceived distance from Orlando was about two hours (Table 11).



TABLE 10: PERCEIVED ADMISSION FEE TO SILVER SPRINGS.

<u>Perceived Fee</u>	<u>%</u>
Free Admission	9.8
\$1-\$2	3.9
\$2-\$4	13.7
\$4-\$6	23.5
\$6-\$8	19.0
\$8-\$10	10.5
\$10-\$12	12.4
More than \$12	<u>7.2</u>
	100.0

TABLE 11: PERCEIVED DRIVING DISTANCE FROM ORLANDO (IN HOURS).

<u>Perceived distance</u>	<u>%</u>
Less than 1 hour.	24.5
1-2 hours.	51.6
2-3 hours.	20.0
More than 3 hours.	<u>3.9</u>
	100.0

#### D. Non-visitors' perceived image of Silver Springs.

Non-visitors were asked to evaluate Silver Springs on a eight-statement image profile. Respondents used five levels on a agree-disagree scale, where "1" represented the highest disagreement with a particular statement, and "5" was the highest agreement.

Results of the image profile are shown in Tables 12-19. Silver Springs is strongly perceived as "a fun place to be" (mean 3.8). The majority of the respondents (51.3%) perceived Silver Springs to be "a place for kids." In addition, the majority of the respondents did not

know if Silver Springs is "good value for money" (51.7%). However, of those who knew, over half (53.6%) agreed that Silver Springs is "a good value for money." A majority of the respondents (51.7%) did not know whether Silver Springs is always crowded or not.

Of those respondents who knew whether Silver Springs is best suited for senior citizens, 43.9% disagreed with the statement that "Silver Springs is best suited for senior citizens," and 28% agreed. In addition, of those respondents who knew whether "Silver Springs is a very educational experience," a very large majority (84.3%) agreed with this statement.

Finally, of those respondents who knew whether Silver Springs is a place for nature lovers only, the majority (50.4%) disagreed with the statement that "Silver Springs is a place for nature lovers only." Of those respondents who knew whether Silver Springs is a place for rest and relaxation only, a majority (51.8%) disagreed with the statement that "At Silver Springs you can rest and relax but do nothing else."

TABLE 12: "TO WHAT DEGREE DO YOU THINK THAT SILVER SPRINGS IS A FUN PLACE TO VISIT?"

	<u>%</u>	<u>Adjusted %</u>
Disagree strongly	3.0	4.2
Disagree	3.0	4.2
Neither agree nor disagree	9.0	12.7
Agree	44.3	62.7
Agree strongly	11.4	16.2
Don't know	<u>29.4</u>	<u>--</u>
	100.0	100.0
Mean	3.82	



TABLE 13: "TO WHAT DEGREE DO YOU THINK THAT SILVER SPRINGS IS

NOT A PLACE FOR KIDS"

	<u>%</u>	<u>Adjusted %</u>
Disagree strongly	21.4	29.3
Disagree	29.9	40.8
Neither agree nor disagree	8.0	10.9
Agree	11.4	15.6
Agree strongly	2.5	3.4
Don't know	<u>26.9</u>	<u>--</u>
Mean	100.0	100.0
Mean	3.82	

TABLE 14: "TO WHAT DEGREE DO YOU THINK THAT SILVER SPRINGS IS

BEST VALUE FOR MONEY?"

	<u>%</u>	<u>Adjusted %</u>
Disagree strongly	1.0	2.1
Disagree	3.0	6.2
Neither agree nor disagree	18.4	38.1
Agree	21.9	45.4
Agree strongly	4.0	8.2
Don't know	<u>51.7</u>	<u>--</u>
Mean	100.0	100.0
Mean	3.51	

TABLE 15: "TO WHAT DEGREE DO YOU THINK THAT SILVER SPRINGS IS ALWAYS CROWED?"

	<u>%</u>	<u>Adjusted %</u>
Disagree strongly	8.0	16.5
Disagree	10.0	20.6
Neither agree nor disagree	19.4	40.2
Agree	8.5	17.5
Agree strongly	2.5	5.2
Don't know	<u>51.7</u>	<u>--</u>
	100.0	100.0
Mean	2.74	

TABLE 16: "TO WHAT DEGREE DO YOU THINK THAT SILVER SPRINGS IS BEST SUITED FOR SENIOR CITIZENS?"

	<u>%</u>	<u>Adjusted %</u>
Disagree strongly	6.5	9.4
Disagree	23.9	34.5
Neither agree nor disagree	19.4	28.1
Agree	13.4	19.4
Agree strongly	6.0	8.6
Don't know	<u>30.8</u>	<u>--</u>
	100.0	100.0
Mean	2.83	



TABLE 17: "TO WHAT DEGREE DO YOU THINK VISITING SILVER SPRINGS IS AN EDUCATIONAL EXPERIENCE?"

	<u>%</u>	<u>Adjusted %</u>
Disagree strongly	3.0	4.1
Disagree	6.5	8.8
Neither agree nor disagree	9.5	12.8
Agree	37.3	50.7
Agree strongly	17.4	23.6
Don't know	<u>26.4</u>	<u>--</u>
	100.0	100.0
Mean	3.81	

TABLE 18: "TO WHAT DEGREE DO YOU AGREE THAT SILVER SPRINGS IS A PLACE FOR NATURE LOVERS ONLY?"

	<u>%</u>	<u>Adjusted %</u>
Disagree strongly	14.4	19.5
Disagree	22.9	30.9
Neither agree nor disagree	13.4	18.1
Agree	15.9	21.5
Agree strongly	7.5	10.1
Don't know	<u>25.9</u>	<u>--</u>
	100.0	100.0
Mean	2.71	

TABLE 19: "TO WHAT DEGREE DO YOU AGREE THAT SILVER SPRINGS IS A PLACE WHERE YOU CAN REST AND RELAX ONLY?"

	%	Adjusted %
Disagree strongly	14.9	21.3
Disagree	21.4	30.5
Neither agree nor disagree	15.9	22.7
Agree	15.9	22.7
Agree strongly	2.0	2.8
Don't know	29.9	--
Other reasons	100.0	100.0
Mean	2.55	

E. Non Visitors' Interest In Visiting Silver Springs

1. Non Visitors' intention to visit Silver Springs

Respondents who had never visited Silver Springs were asked if they thought seriously about visiting Silver Springs. Less than half of the respondents (45.8%) said that they thought seriously about visiting the park (Table 20).

TABLE 20: "HAVE YOU EVER THOUGHT SERIOUSLY ABOUT VISITING SILVER SPRINGS?"

	%
Yes	45.8
No	54.8

2. Primary reason for not visiting Silver Springs.

Respondents who had not visited Silver Springs were asked why they had



not visited the park. The question was open-ended; respondents gave "top-of-mind" unaided answers. All answers were recorded verbatim and later grouped into the categories shown below in Table 21. Of those who thought seriously about visiting Silver Springs and did not visit, a plurality (19.4%) did not visit it because of "lack of time" followed by "other reasons" (10.4) and "Visited others attractions" (9.0%).

TABLE 21: "WHY HAVEN'T YOU VISITED SILVER SPRINGS?"\*

	<u>%</u>
No time	19.4
Other reasons	16.4
Visited other attractions	9.0
Silver Springs is out of the way	4.5
Family Situation (young children, too old)	2.0
Never heard of it	1.5

\* Percentages may add up to 100% due to a few multiple responses

### 3. Primary reason for not thinking seriously about visiting Silver Springs.

Of those who have not thought seriously about visiting Silver Springs a plurality (13.9%) said that they had "never heard of it" followed by "other reasons" (11.4%) and "Other attractions appeal better" (7.0%).

TABLE 22: "HAVE YOU EVER TALKED TO A PERSON WHO HAS BEEN TO SILVER SPRINGS?"

TABLE 22: "WHY HAVEN'T YOU THOUGHT SERIOUSLY ABOUT VISITING SILVER SPRINGS?"\*

	<u>X</u>	<u>%</u>
Never heard of it	13.9	13.9
Other reasons	11.4	11.4
Other attractions appeal better	7.0	7.0
No time	6.0	6.0
Out of the way	5.0	5.0
Do not visit attractions	2.5	2.5
Family situation	1.5	1.5

\*Percentage may not add up to 100% due to a few multiple responses.

4. "Word of Mouth" influence on future intention to visit Silver Springs.

Respondents were asked if they had ever talked to someone who has been to Silver Springs. About 38% of the respondents talked to someone who has been to Silver Springs. (Table 23). Of those respondents who talked to someone who has been to Silver Springs, the majority (54.4%) were more interested in going there (Table 24).

Those respondents who became less interested in visiting Silver Springs said so because of three reasons: "too much walking", "it sounds for kids" and "sounds like other attractions". Note that only 3 respondents answered this question.

TABLE 23: "HAVE YOU EVER TALKED TO A PERSON WHO HAS BEEN TO SILVER SPRINGS?"

	<u>%</u>
Yes	38.3
No	<u>61.7</u>
	100.0



TABLE 24: LEVEL OF INTEREST TO VISIT SILVER SPRINGS  
AFTER TALKING TO SOMEONE WHO HAS BEEN THERE

<u>Level of Interest</u>	<u>%</u>
Less Interested	6.3
No Effect	39.2
More Interested	<u>54.4</u>
	100.0
Mean	2.48
Standard deviation	0.61
Standard error of mean	0.07

F. Influence of advertising on Non-Visitors' Intention to visit Silver Springs.

Respondents were asked whether they saw any of the following three types of advertisements: billboards, brochures, and TV commercials. Billboards were the most seen form of advertising (59.7%) followed by brochures (48.8%), and TV Commercials (20.9%). (Table 25)

When all three forms were crosstabulated, the plurality of the respondents (36.3%) saw a combination of billboards and brochures. (Table 26)

When respondents were asked if these forms of advertising influenced them to visit Silver Springs, brochure advertising was ranked first (74.5%) followed by TV commercials (72%) and billboards (52.1%) (Table 27).

TABLE 25: ADVERTISEMENTS SEEN BY NON VISITORS

	<u>%</u>
Billboards	59.7%
Brochures	48.8%
TV commercials	20.9%

TABLE 26: PROPORTION OF RESPONDENTS WHO SAW A COMBINATION OF TWO FORMS OF ADVERTISING

	<u>%</u>
Billboards and brochures	36.3
Billboards and TV commercials	17.9
Brochures and TV commercials	16.9

TABLE 27: INFLUENCE OF ADVERTISING ON INTENTION TO VISIT SILVER SPRINGS

	<u>%</u>	
Brochures	74.5	(N=98)
TV commercials	72.1	(N=43)
Billboards	47.9	(N=121)

G. Impact of behavioral and demographic variables on intention to visit and perceived image of Silver Springs.

In this section, a few behavioral and demographic variables were crosstabulated and correlated with the variables "intention to visit" and "perception of Silver Springs." This was done in order to reveal the impact of advertising on intention to visit, and perceived image of Silver Springs, as well as to identify potential market segments to which marketing strategies should be directed. Only statistically significant findings are reported below.



1. Impact of familiarity with Silver Springs on intention to visit and perceived image

Of those respondents who thought seriously of visiting Silver Springs, the majority (75%) were familiar with the park. The level of interest in visiting Silver Springs after talking to someone who visited the park, is positively associated with the level of familiarity with the park: Respondents who were very familiar with the park were more interested in visiting (66.7%) than those who were not familiar (36.8%).

TABLE 28: IMPACT OF LEVEL OF FAMILIARITY WITH SILVER SPRINGS ON INTENTION TO VISIT

Level of Familiarity with Silver Springs	Thought seriously of visiting Silver Springs		After talking to someone who has been, how interested did you become?		
	Yes	No	Less Interested	No Effect	More Interested
	%	%	%	%	%
Unfamiliar	24.5 <sup>1</sup>	75.5 <sup>1</sup>	-	63.2 <sup>1</sup>	36.8 <sup>1</sup>
	25.0 <sup>2</sup>	66.4 <sup>2</sup>	-	40.0 <sup>2</sup>	16.3 <sup>2</sup>
Somewhat Familiar	67.8 <sup>1</sup>	32.2 <sup>1</sup>	9.4 <sup>1</sup>	30.2 <sup>1</sup>	60.4 <sup>1</sup>
	66.3 <sup>2</sup>	27.1 <sup>2</sup>	100.0	53.3 <sup>2</sup>	74.4 <sup>2</sup>
Very Familiar	53.3 <sup>1</sup>	46.7 <sup>1</sup>	-	33.3 <sup>1</sup>	66.7 <sup>1</sup>
	8.7 <sup>2</sup>	6.5 <sup>2</sup>	-	6.7 <sup>2</sup>	9.3 <sup>2</sup>

<sup>1</sup> Row percentage

<sup>2</sup> Column percentage

Respondents who were more familiar with Silver Springs perceived Silver Springs to be more as "a fun place to be" than those who were less familiar.

Respondents who were more familiar with Silver Springs perceived Silver Springs to be more of a "best value for money" than those who were less familiar.

Respondents who were more familiar with Silver Springs perceived Silver Springs to be more an "educational experience" than those who were less familiar.

Respondents who were less familiar with Silver Springs perceived Silver Springs to be more a place "for nature lovers only" than those who were more familiar. (Table 29 indicates these correlations)

TABLE 29: CORRELATION OF LEVEL OF FAMILIARITY WITH SILVER SPRINGS ON PERCEIVED IMAGE

<u>perceived image</u>	<u>correlation with level of familiarity</u>
"Silver Springs is a fun place to be"	.24
"Silver Springs is best value for money"	.19
"Silver Springs is an educational experience"	.20
"Silver Springs is a place for nature lovers only"	-.30

2. Impact of intention to visit Silver Springs ("Thought Seriously") on perceived image.

Respondents who thought seriously about visiting Silver Springs, perceived Silver Springs to be more as "a fun place to visit" (mean= 4.12) than those who did not think seriously (mean= 3.35).

Respondents who thought seriously about visiting Silver Springs, perceived Silver Springs to be more "best value for money" (mean= 3.73) than those who did not think seriously (mean= 3.06).

Respondents who thought seriously about visiting Silver Springs, perceived Silver Springs to be "less best suited for senior citizens" (mean= 2.57) than those who did not think seriously (mean= 3.21).

Respondents who thought seriously about visiting Silver Springs, perceived Silver Springs to be more as an "educational experience" (mean= 4.11) than those who did not think seriously (mean= 3.38).

Respondents who thought seriously about visiting Silver Springs, perceived Silver Springs to be less as "a place for nature lovers only" (mean= 2.49) than those who did not think seriously (mean= 3.03).



Respondents who thought seriously about visiting Silver Springs, perceived Silver Springs to be less as a place for rest and relaxation only (mean= 2.38) than those who did not think seriously (mean= 2.80).

Respondents who thought seriously about visiting Silver Springs, were more interested in visiting after talking to someone who has been (mean= 2.69) than those who did not think seriously (mean= 1.95).

3. Impact of billboard advertising on intention to visit and perceived image Silver Springs

Of those respondents who saw billboard ads, 55% thought seriously about visiting Silver Springs. In addition, of those respondents who saw billboard ads, 48.3% were influenced to visit Silver Springs.

TABLE 30: SEEING BILLBOARD ADVERTISING BY THINKING SERIOUSLY ABOUT VISITING SILVER SPRINGS, AND INFLUENCE OF BILLBOARDS TO VISIT.

Ever seen Billboard Advertising?	Thought seriously of visiting Silver Springs?		Billboards influenced to visit?	
	Yes	No	Yes	No
	%	%	%	%
Yes	55.0 <sup>1</sup> 71.7 <sup>2</sup>	45.0 <sup>1</sup> 49.5 <sup>2</sup>	48.3 <sup>1</sup> 100.0 <sup>2</sup>	51.7 <sup>1</sup> 98.4 <sup>2</sup>
No	32.1 <sup>1</sup> 28.3 <sup>2</sup>	67.9 <sup>1</sup> 50.5 <sup>2</sup>	- -	100.0 <sup>1</sup> 1.6 <sup>2</sup>

<sup>1</sup> Row percentage    <sup>2</sup> Column percentage

Respondents who saw billboards advertising Silver Springs, perceived Silver Springs to be more as a fun place to visit (mean= 4.03) than those who did not see billboards advertising (mean= 3.49).

Respondents who saw billboards advertising Silver Springs, perceived Silver Springs to be more as an educational experience (mean= 4.04) than those who did not see billboards advertising (mean= 3.42).

Respondents who saw billboards advertising Silver Springs, perceived Silver Springs to be less as a place for nature lovers only (mean= 2.55) than those who did not see billboards advertising (mean= 3.00).

Respondents who were influenced by billboard advertising, were more interested in visiting Silver Springs after talking to someone who has been there (mean= 2.77) than those who did not see billboard advertising (mean= 1.95).

4. Impact of TV commercials on intention to visit and perceived image of Silver Springs.

Of those respondents who saw TV commercials, 71.4% thought seriously about visiting Silver Springs. In addition, of those respondents who saw TV commercials, 73.8% were influenced to visit Silver Springs.

TABLE 31: EXPOSURE TO TV COMMERCIAL BY THINKING SERIOUSLY ABOUT VISITING SILVER SPRINGS AND INFLUENCE OF TV COMMERCIAL TO VISIT.

Ever seen TV commercial?	Thought seriously of visiting Silver Springs		TV commercial influenced to visit?	
	Yes %	No %	Yes %	No %
Yes	71.4 <sup>1</sup> 32.6 <sup>2</sup>	28.6 <sup>1</sup> 11.0 <sup>2</sup>	73.8 <sup>1</sup> 100.0 <sup>2</sup>	26.2 <sup>1</sup> 91.7 <sup>2</sup>
No	39.0 <sup>1</sup> 67.4 <sup>2</sup>	61.0 <sup>1</sup> 89.0 <sup>2</sup>	- -	100.0 <sup>1</sup> 8.3 <sup>2</sup>

<sup>1</sup> Row percentage

<sup>2</sup> Colomn percentage

Respondents who saw TV commercials advertising Silver Springs, perceived Silver Springs to be more as "a fun place to visit" (mean= 4.07) than those who did not see TV commercials (mean= 3.72).

Respondents who saw TV commercials advertising Silver Springs, perceived Silver Springs to be more as "a place for children" than those who did not see TV commercials.



Respondents who saw TV commercials advertising Silver Springs, perceived Silver Springs to be more as an "educational experience" (mean= 4.10) than those who did not see TV commercials (mean= 3.70).

Respondents who saw TV commercials advertising Silver Springs, perceived Silver Springs to be less as "a place for nature lovers only" (mean= 2.17) than those who did not see TV commercials (mean= 2.90).

Respondents who were influenced by TV commercials perceived that Silver Springs is less "best suited for senior citizens" (mean= 2.33) than those who were not influenced by TV commercials (mean= 3.60).

Respondents who were influenced by TV commercials perceived more correctly the admission fee to Silver Springs (about \$8) than those who were not influenced by TV commercials (about \$3).

5. Impact of brochure advertising on intention to visit and perceived image of Silver Springs.

Of those respondents who saw brochure advertising of Silver Springs, 71.4% thought seriously about visiting Silver Springs. In addition of those respondents who saw brochure advertising, 74.5% were influenced to visit Silver Springs.

TABLE 32: SEEING BROCHURE ADS BY THINKING SERIOUSLY ABOUT VISITING SILVER SPRINGS AND INFLUENCE OF THE BROCHURE ADVERTISING TO VISIT

Ever seen brochure advertising?	Thought seriously of visiting Silver Springs		Brochure advertising influenced to visit?	
	Yes %	No %	Yes %	No %
Yes	71.4 <sup>1</sup> 76.1 <sup>2</sup>	28.6 <sup>1</sup> 25.7 <sup>2</sup>	74.5 <sup>1</sup> 100.0 <sup>2</sup>	25.5 <sup>1</sup> 100.0 <sup>2</sup>
No	21.4 <sup>1</sup> 23.9 <sup>2</sup>	78.6 <sup>1</sup> 74.3 <sup>2</sup>		

1 Row percentage      2 Column percentage

Respondents who saw brochures advertising Silver Springs, perceived Silver Springs to be more as "a fun place to visit" (mean= 4.12) than those who did not see brochures advertising Silver Springs (mean= 3.33).

Respondents who saw brochures advertising Silver Springs, perceived Silver Springs to be more as "a place for children" than those who did not see brochures advertising Silver Springs.

Respondents who saw brochures advertising Silver Springs, perceived Silver Springs to be more as "best value for money" (mean= 3.67) than those who did not see brochures advertising Silver Springs (means= 3.25).

Respondents who saw brochures advertising Silver Springs, perceived Silver Springs to be less "best suited for senior citizens" (means= 2.63) than those who did not see brochures advertising Silver Springs (mean= 3.14).

Respondents who saw brochures advertising Silver Springs, perceived Silver Springs to be more an "educational experience" (mean= 4.09) than those who did not see brochures advertising Silver Springs (mean= 3.40).

Respondents who saw brochures advertising Silver Springs, were more interested in visiting Silver Springs after talking to someone who has visited (mean= 2.60) than those who did not see a brochures advertising Silver Springs (mean= 2.05).

Respondents who were influenced by brochures advertising Silver Springs were more interested in visiting Silver Springs after talking to someone who has visited (mean= 2.80) than those who did not see brochures advertising (mean= 2.05).

6. Impact of age, income, and number of children under 18 in household, on perceived image of Silver Springs.

Respondents with more children in the household perceived Silver Springs to be more a fun place to visit than those with fewer children.



Older respondents perceived Silver Springs to be more "best suited for senior citizens" than those who were younger.

Respondents who had lower annual income perceived Silver Springs to be more crowded than respondents who had higher annual income.

Respondents who had lower annual income perceived Silver Springs to be more a place "for nature lovers only" than respondents who had higher annual income.

TABLE 33: CORRELATION OF AGE, INCOME AND NUMBER OF CHILDREN UNDER 18 IN HOUSEHOLD, ON PERCEIVED IMAGE OF SILVER SPRINGS.

Perceived Image	Correlation with		
	Age	Level of education	Number of Children in household
"Silver Springs is a fun place to be"	N/S	N/S	.14
"Silver Springs is always crowded"	N/S	-.20	N/S
"Silver Springs is best suited for Senior Citizens"	.16	N/S	-.20
"Silver Springs is a place for nature love is only"	N/S	-.14	N/S

Key: N/S=Not Significant

Finally, Male respondents perceived Silver Springs to be more as a fun place to visit (mean= 3.95) than Females (mean= 3.59).

#### IV. SUMMARY AND CONCLUSIONS

##### A. Demographic Profile of the Non-Visitor to Silver Springs

This study found that the typical non-visitor is: married, over 50 years of age, does not have children living at home and has an annual income of \$25,000-50,000.

This profile is similar to the typical profile of the visitor which was found in previous studies. The typical visitor to Silver Springs is married (82%), head of a household (67%), has an average of 2.9 persons in his family, of which 2.1 are 18 or over, is between 49 and 53 years of age, and is earning between \$25000 and \$50000 per year.

It is obvious therefore that currently Silver Springs does not attract mature, well to do families who have no children living in their homes.

##### B. Attractions Previously Visited

Silver Springs' major competitors in the non-visitor segment were not surprisingly found to be Magic Kingdom, EPCOT, Bush Gardens and Sea World.

##### C. Familiarity and Perception of Silver Springs

By their own admission about one half of the respondents were not familiar with Silver Springs.

Silver Springs was perceived by non-visitors to be mostly a glass bottom and fish and marine-life attraction. Only few non-visitors perceived it to be a Botanical Garden. The admission fee was perceived to be lower than in reality, while the perception distance from Orlando was accurate.

The majority of respondents thought that Silver Springs was: 1) a fun place to be; 2) an attraction suitable for children; 3) a good value for money and 4) an educational experience. Most respondents did not perceive Silver



Springs to be "suitable for nature lovers only" and "a place for rest and relaxation only."

In other words Silver Springs was perceived as a fun, educational and active type of attraction suitable for all ages.

D. Interest in visiting Silver Springs

The majority of respondents have never thought seriously about visiting Silver Springs either because they never heard of it, or the place did not appeal to them. Of those who thought seriously about visiting, the major reason for no visitation was lack of time.

Talking to someone who has been to Silver Springs had usually increased the interest in visiting Cypress Gardens.

E. Advertising

Brochures and billboards turned out to be more powerful means of influencing the decision to visit Silver Springs than TV advertising.

F. Factors affecting intention to visit

Familiarity affects intention to visit as well as perception of the park. Those respondents who were familiar with the park had stronger intentions to visit it, as well as perceived it in a more positive manner. (e.g. best value for money, educational experience etc.).

Advertising had also a significant impact on intentions to visit. Those respondents who were exposed to billboards, brochures and TV commercials expressed stronger intentions to visit than those who had not been exposed.

Finally, respondents' age, income and number of children in the household affected the perception of the attraction. Respondents with more children and

higher income perceived the park in a more positive manner than those with fewer children and lower income.

#### V. RECOMMENDATIONS

We recommend the enactment of the following new Marketing strategies in order to attract more of the non-visitor segment:

- 1) Reposition the park's image by deemphasizing glass-bottom boats and balancing the animal and botanical components.
- 2) Emphasize the positive aspects of the park, namely: that it is fun, good value for money, suitable for all ages and is never crowded.
- 3) Position the park vis-a-vis the man-made competition.
- 4) Reevaluate the allocation of resources between advertising media. Major TV allocations should be done only on an experimental basis in test markets with close examination of results. Distribution of brochures should be further increased.
- 5) Change the composition of some billboards to reflect the totality of the park and not just the "water aspects."
- 6) Increase park awareness by means of publicity, public relations and scheduling of special events.
- 7) Examine the potential of non-visiting Floridians as an additional segment as well as a "word of mouth" source of advertising.