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The U.S. Travel Market to Spain: Perceptions of U.S. Residents who have Never Visited Spain

Dick Pope Sr. Institute for Tourism Studies



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**THE U.S. TRAVEL MARKET TO SPAIN:
PERCEPTIONS OF
U.S RESIDENTS
WHO HAD NEVER VISITED SPAIN**

Prepared for:

Secretaria General De Turismo
Madrid, Spain

by:

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EXECUTIVE SUMMARY

The following is a summary of the main findings of the research:

1. Respondents took an average of 2.7 trips to European destinations in the past five years.
2. When traveling to Europe the majority (74.9%) traveled individually rather than on an organized tour.
3. Respondents sought travel information primarily from travel agencies (34.5%), friends and relatives (27.2%), travel guide books (15%) and airlines (14.4%).
4. Of the European countries respondents **had previously visited**, respondents most often mentioned France (24%), the United Kingdom (20%), and Italy (15%) as the country they would most like to **revisit**.
5. Of the European countries respondents **had never visited**, respondents most often mentioned Spain (15.5%), Italy (15%), Greece (9%), and France (7.5%) as the country they would most like to visit.
6. When asked to state the first thing that came to their mind when thinking of Spain, respondents mentioned sun, sea, bull fights, Spanish cities, architecture, food, language, and "good vacation bargain" most often.
7. Respondents' estimate of round trip airfare from New York to Spain averaged \$812. Their estimates of the duration of a flight from New York to Spain averaged 8.1 hours.
8. Respondents perceived Spaniards to be warm, charming, and hospitable towards Americans. They did not perceive Spaniards to be dishonest nor did they perceive them to be like Hispanics in the U.S. Spain was not perceived by respondents to be a fascist country.
9. Respondents perceived Spain as a destination offering an abundance of arts and crafts items for sale. Spain was perceived as a warm climate destination where one should visit from two to three weeks.
10. Respondents did not perceive Spain as a country without a highly visible landmark like other European countries nor did they perceive Spain as not having enough night life. They didn't perceive Spanish food to be similar to Mexican food in the U.S.
11. Spain was perceived as an inexpensive destination to visit.

12. The majority (62%) of the respondents had not been exposed to advertising about Spain. Respondents who had seen advertising about Spain (36%) indicated that they saw advertising mostly in magazines (28.3%), newspapers (25.3%), and brochures (16.2%).

13. Two-thirds of the respondents said that they would either be very interested or fairly interested in visiting Spain (32% and 33%, respectively). Respondents who said that they would not be interested in visiting Spain indicated that they would rather visit other destinations, had already made other vacation plans, it was too expensive to visit Spain, or had old age limitations.

14. Almost one half of the respondents said that they probably would or definitely would be visiting Spain (16.2% and 31.5%, respectively).

15. The majority of the respondents (84.3%) said they would prefer to visit Spain along with other countries.

16. Potential travelers to Spain had the following characteristics:

- a. Perceived Spaniards to be warm, cordial, charming, and hospitable towards American tourists.
- b. Did not think that Spain was expensive relative to other European destinations.
- c. Did not think Spain was a fascist country
- d. Did not think Spain lacked a visible tourist landmark like other European countries.
- e. Had traveled more extensively in Europe.
- f. Were more likely to travel individually than with a organized tour group.
- g. Had seen or heard advertising about Spain.
- h. Were from the 40-49, 60-69, 30-39, and 18-29 age groups.
- i. Had a college degree.

I. INTRODUCTION

Research Objectives:

The major objective of this study was to identify and understand the image of Spain as a tourist destination among experienced European travelers who had never visited Spain. The study also identified the demographic characteristics, travel behavior, and exposure to promotion and advertising about Spain of U.S. residents who had never visited Spain.

II. METHODOLOGY

A. Instrument:

The study was conducted in two phases: first, eight focus groups of U.S. residents who were experienced international travelers to Europe but had never traveled to Spain. The focus groups were held in San Francisco, Los Angeles, New York City, and Miami. These metropolitan areas were chosen because a previous study conducted by the Dick Pope, Sr. Institute for Tourism Studies for the Government of Spain (May 1988) indicated a high propensity to travel to Spain among residents of these areas.

The purpose of the focus groups was to identify U.S. residents' image of Spain as a vacation destination, exposure to promotion about Spain, and suggestions for improving Spain's tourist image. For a comprehensive analysis of the focus group sessions please refer to our publication "U.S. Residents' Perception of Spain as a Tourist Destination: Focus Group Reports" (April, 1990).

In the second phase, A telephone questionnaire was developed

based on the focus group findings and the Dick Pope, Sr. Institute for Tourism Studies marketing research methodology.

B. Sampling:

Telephone interviews were conducted among a representative sample of residents of the San Francisco, Los Angeles, New York, and Miami metropolitan areas.

To achieve a net sample of 200 respondents, 1863 telephone calls were made. Out of these, 1537 were disqualified respondents (either had previously visited Spain, had never visited Europe, or spoke a language other than English or Spanish), leaving a net sample of 326 eligible. From this sample, 126 refused to participate in the study. The remaining 200 respondents yielded a response rate of 61.3%.

C. Data Analysis:

The 44-item questionnaire was designed to be completed within ten minutes. Interviews lasted between 5 and 24 minutes with an average length of 10.2 minutes.

Completed questionnaires were coded, and the data were analyzed at the University of Central Florida. Frequency distributions were generated for all questions. In addition, regression analysis, analyses of variance, and t-tests were performed for the variables predicting interest in and likelihood of visiting Spain. The results are presented in the Findings section of this report.

D. Limitations:

Several limitations in the research methodology are noted here. The practice of interviewing only willing respondents may create problems of representation. Since there was no control over who participated in the study the results could have been biased by either favorable or unfavorable participants.

In addition, respondents were generally aware that their opinions were being sought by a research institution sponsored by a foreign government and consequently, they may have been less likely to express dissatisfaction with various aspects of the Spanish tourism product.

The interviewing also occurred during a period when the U.S. dollar was relatively weak compared to many European currencies. This, might have affected responses to some of the questions and should be noted when comparing the present data to past or future data.

Finally, interviews were conducted in four metropolitan areas where residents had exhibited the highest likelihood of going to Spain. Consequently, the sample may not represent the total U.S. potential market to Europe who had never been to Spain.

III. FINDINGS

A. Demographic Profile of Respondent Sample:

The sample consisted of 45% males and 55% females (Table 1). The majority of the respondents (54.1%) were married (Table 2), had a college degree (61.6%) (Table 3), and their median age was between 40 and 49 (Table 4). Their median 1989 annual household income was \$40-50,000 (Table 5). Interviews were conducted equally in the Miami, New York, Los Angeles, and San Francisco metropolitan areas (Table 6).

Table 1:

Sex of Respondent

Sex	%
1. Male	44.5
2. Female	55.5
Total	100.0

Table 2:

Marital Status of Respondent

Status	%
1. Single	29.1
2. Married	54.1
3. Divorced/Separated	8.2
4. Widowed	8.7
Total	100.0

Table 3:
Highest Level of Education

Level	%
1. Grade School	1.0
2. Some High School	3.1
3. High School Diploma	10.8
4. Some College	23.6
5. College Degree	43.1
6. Advanced Degree	18.5
Total	100.0

Table 4:
Age of the Respondent

Age	%
1. 18-29	21.1
2. 30-39	24.2
3. 40-49	24.2
4. 50-59	14.4
5. 60-69	9.8
6. 70 and older	6.2
Total	100.0
Median	40-49

Table 5:
1989 Annual Household Income

Income	%
1. Under \$20,000	7.1
2. \$20-\$30,000	17.8
3. \$30-\$40,000	18.3
4. \$40-\$50,000	10.7
5. \$50-\$60,000	11.8
6. \$60-\$70,000	6.5
7. \$70-\$80,000	3.6
8. Over \$90,000	4.7
9. Refused	19.5
Total	100.0
Median	\$40-50,000

Table 6:
**Respondent's Permanent place of Residence
(Area of Dominant Influence)**

Area of Dominant Influence	%
1. Miami	25.0
2. New York	25.0
3. Los Angeles	25.0
4. San Francisco	25.0
Total	100.0

B. Foreign Vacation Travel Behavior:

The respondents took an average of 2.7 trips and a median of two trips to European destinations in the past five years (Table 7). When traveling to Europe, the majority of the respondents traveled individually (74.9%) rather than with an organized tour (19.6%). Only 5.5% indicated that they traveled both individually and/or with organized tours (Table 8).

The respondents sought foreign travel information primarily from travel agencies (34.5%), friends and relatives (27.2%), travel guide books (15.0%), and airlines (14.5%). Least often sought travel information sources included: magazine advertisements (4.0%), government tourist offices (3.0%), newspaper advertisements (2.0%), and television advertisements (0.5%) (Table 9). "Other sources" mentioned included: business/employment contacts, religious organizations, educational institutions, or general books about the destinations.

Table 7:
Number of Foreign Trips Taken

Number	%
1. One	40.5
2. Two	23.5
3. Three	15.5
4. Four	6.5
5. Five	4.0
6. Six	2.0
7. Seven	1.5
8. Eight	2.0
9. Nine	0.5
10. Ten	3.0
11. Fifteen	0.5
12. Twenty	0.5
Total	100.0
Mean	2.7
Standard Deviation	2.6
Median	2.0

Table 8:

Whether European travel was part of a tour package

Method of Travel	%
1. Organized Tour	19.6
2. Individual	74.9
3. Both	5.5
Total	100.0

Table 9:

Sources used for planning trips to Europe^(a)

Source	%
1. Travel Agency	34.5
2. Friends and Relatives	27.0
3. Travel Guide Books	15.0
4. Airlines	14.5
5. Previous Experience	7.5
6. Brochures	6.5
7. Travel Club	5.5
8. Magazine Articles	5.5
9. Newspaper Articles	5.0
10. Tour Operator	4.5
11. Magazine Advertisement	4.0
12. Government Tourist Office	3.0
13. Newspaper Advertisement	2.0
14. Television Advertisement	0.5
15. Other	14.0
16. Did Not Get Any Travel Information	5.0

Note^(a): Total percentages exceed 100% due to multiple responses.

C. Destination Preference for Future Travel to Europe:

Respondents were asked to indicate which European country that they **had previously visited** would they most like to **revisit**. The three most often mentioned countries were: France (24%), the United Kingdom (20.0%), and Italy (15.0%) (Table 10).

Respondents were also asked to indicate which European country that they **had never visited** they would most like to visit. Spain was mentioned most often (15.5%), followed by Italy (15.0%), Greece (9.0%), and France (7.5%) (Table 11).

Table 10:

European country most wished to revisit

Country	%
1. France	24.0
2. United Kingdom	20.0
3. Italy	15.0
4. Germany	9.0
5. Austria	6.0
6. Switzerland	6.0
7. Greece	5.0
8. Belgium	3.0
9. Spain	2.0
10. Denmark	1.5
11. Norway	1.5
12. Yugoslavia	1.5
13. Denmark	1.0
14. Hungary	0.5
15. Monaco	0.5
16. Portugal	0.5
17. Russia	0.5
Total	100.0

Table 11:

European country most wished to visit for first time

Country	%
1. Spain	15.5
2. Italy	15.0
3. Greece	9.0
4. France	8.5
5. Switzerland	7.5
6. Sweden	6.0
7. Germany	6.0
8. United Kingdom	5.0
9. Russia	3.0
10. Holland	2.0
11. Norway	2.0
12. Portugal	2.0
13. Czechoslovakia	1.5
14. Poland	1.5
15. Yugoslavia	1.5
16. Belgium	1.0
17. Austria	1.0
18. Finland	1.0
19. Hungary	0.5
20. Israel	0.5
21. Luxembourg	0.5
22. Malta	0.5
23. Rumania	0.5
Total	100.0

D. Perception of Spain as a Vacation Destination:

Respondents were asked to state what first comes to their mind when thinking of Spain as a vacation destination. Table 12 indicates that Spain was perceived as a sun-sea destination. The bull fights were also mentioned. Respondents mentioned Spain's cities, as well as the architecture, food, and language. Finally, Spain was described as an inexpensive tourist bargain (Table 12).

Respondents were asked to estimate the duration of a flight from New York to Spain. Responses ranged from 3 to 24 hours. The average length of flight was 8.1 hours with a standard deviation of 2.5 hours. The median length of flight was estimated at 8 hours (Table 13).

Respondents were also asked to estimate the cost of a round trip ticket from New York to Spain. Responses ranged from \$149 to \$6,000 with an average cost of \$812.16 and a standard deviation of \$541.72. The median estimated cost of flight was \$700.00 (Table 14).

Respondents were asked to evaluate Spain as a vacation destination by indicating their agreement or disagreement with twenty-one statements about Spain. Respondents utilized a scale from 1 to 5 where "1" indicated total disagreement and "5" indicated total agreement. The results are presented in Table 15. Respondents perceived Spaniards to be warm, charming, and hospitable towards Americans. Spaniards were not perceived to be dishonest nor were they perceived to be like Hispanic people in the United States. Respondents neither agreed nor disagreed that

there is a lot of petty crime in Spain. They did not perceive Spain to be a fascist country either.

Spain was perceived to have an abundance of quality arts and crafts items for sale. Additionally, it was perceived as a very warm destination where one should visit for between two and three weeks. Respondents disagreed that Spain does not have a highly visible landmark like other European countries have and that there isn't enough night life in Spain. Respondents also disagreed that Spanish food is very similar to Mexican food in the United States.

In terms of value for money and comfort, Spain was perceived to be an inexpensive destination and airfare to Spain was not perceived to be expensive relative to other European destinations. Respondents neither agreed nor disagreed that tourists should be careful not to drink the water in Spain, that the train service in Spain is slow and unreliable, that shopping in Spain is no longer a bargain, or that deluxe hotels in Spain are not as nice as hotels in the United States. Additionally, respondents neither agreed nor disagreed that it is difficult to communicate in English in Spain. Respondents disagreed that Spain is not psychologically associated with Europe.

Table 12:

Perception of Spain as a vacation destination^(a)

Response	Incidents
1. Beaches	19
2. Bullfights	17
3. Madrid	14
4. Hot/Warm weather	13
5. Sun	11
6. Barcelona	8
7. Architecture	8
8. Food	7
9. Language	7
10. Inexpensive	6
11. Culture	6
12. South of Spain	6
13. Nice vacation spot	5
14. Olympics, 1992	5
15. Seville	4
16. Night life	4
17. Women	4
18. Toledo	4

Note: ^(a) "When you think about Spain as a vacation destination what comes first to the top of your mind?"

Table 13:

Perceived Length of Flight from New York to Spain

Length of Time	%
1. Three hours	0.5
2. Five hours	5.5
3. Six hours	29.7
4. Seven hours	45.6
5. Eight hours	22.5
6. Nine hours	8.2
7. Ten hours	8.2
8. Eleven hours	4.4
9. Twelve hours	7.7
10. Thirteen hours	1.1
11. Fourteen hours	0.5
12. Fifteen hours	1.1
13. Twenty-four hours	0.5
Total	100.0
Mean	8.1
Standard Deviation	2.4
Median	8.0

Table 14:

Estimated Round-Trip Airfare from New York to Spain

Airfare	%
1. \$149	0.6
2. \$320	0.6
3. \$350	0.6
4. \$400	5.3
5. \$450	0.6
6. \$498	0.6
7. \$500	11.2
8. \$550	0.6
9. \$600	17.6
10. \$650	2.9
11. \$700	14.7
12. \$800	17.6
13. \$850	0.6
14. \$900	7.1
15. \$950	0.6
16. \$1000	10.0
17. \$1100	0.6
18. \$1200	1.8
19. \$1400	0.6
20. \$1500	1.2
21. \$2000	2.9
22. \$2200	0.6
23. \$3000	0.6
24. \$6000	0.6
Total	100.0
Mean	\$812.2
Standard Deviation	\$541.7
Median	\$700.0

Table 15:

Perceptions of Spain as a Tourist Destination

Statement:	MEAN ^(a)	STD DEV
1. Spain has a large variety of quality arts and crafts for sale.	3.8	0.6
2. Spanish people are warm, cordial and charming.	3.7	0.8
3. Spain is a very warm destination.	3.6	0.8
4. A visit to Spain should last between two and three weeks.	3.4	1.0
5. Spain is an inexpensive destination.	3.3	0.9
6. Tourists should be careful not to drink the water in Spain.	3.0	1.1
7. The train Service in Spain is slow and unreliable.	3.0	0.7
8. In Spain, there is a lot of petty crime.	2.9	0.9
9. Spain's roads are old and difficult to drive on.	2.9	0.8
10. Shopping in Spain is no longer a bargain.	2.9	0.9
11. In Spain, it is difficult to communicate in English.	2.8	1.0
12. Deluxe hotels in Spain are not as nice as deluxe hotels in the United States.	2.8	1.0
13. Spain is not psychologically associated with Europe.	2.7	0.9
14. Compared to other European destinations, the airfare to Spain is very expensive.	2.5	0.8
15. Spain does not have a highly visible tourist landmark like other European countries have.	2.5	1.0

Table 15 (continued):

Perceptions of Spain

Statement:	MEAN	STD DEV
16. There is hardly any night life in Spain.	2.4	0.9
17. Spanish people are not hospitable to American Tourists.	2.4	0.9
18. Spain is a fascist country.	2.3	0.8
19. Spanish food is very similar to Mexican food in the U.S.	2.3	1.0
20. Spanish people are very much like the Hispanic residents of the United States.	2.2	0.9
21. Spaniards are dishonest people.	2.1	0.8

(a) Scale:

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree
 1-----2-----3-----4-----5

E. Exposure to Advertising:

When respondents were asked whether they had been exposed to advertising about Spain, the majority (62%) said that they had not. Those that said that they had seen advertising about Spain (38%) were asked to indicate what type of advertising they had seen. The three types of advertising most frequently seen were: magazine (28.3%), newspaper (25.3%), and brochure (16.2%). This was followed by television (9.1%), direct mail marketing (8.1%), radio (1.0%), and billboard (1.0%) advertising. Other types of advertising mentioned included: word of mouth, poster, book store and travel agency.

Table 16:

Exposure to Advertising about Spain^(a)

Response	%
1. No	62.0
2. Yes	38.0
Total	100.0

Note: ^(a) "Did you hear or read any advertising about Spain?"

Table 17:

Type of Advertising Seen by Respondents^(a)

Type:	%
1. Magazine	28.3
2. Newspaper	25.3
3. Brochure	16.2
4. Television	9.1
5. Direct Mail Marketing	8.1
6. Radio	1.0
7. Billboard	1.0
8. Other	11.1

Note: (a) Percentages will exceed 100% due to multiple responses.

F. Interest in and likelihood of visiting Spain in the next three years:

Respondents were asked to indicate whether they would be interested in visiting Spain within the next three years. One third (33%) indicated that they would be very interested in visiting Spain and almost as many (32%) indicated that they would be fairly interested in visiting Spain. Slightly over one third of the respondents indicated that they would not be interested at all or would only be fairly interested in visiting Spain in the next three years (22% and 13%, respectively) (Table 18).

Respondents who indicated that they would not be interested in visiting Spain were asked to state why they were not interested. Responses mentioned most often included (in a descending order): "would rather visit other places;" "already made other plans;" "too expensive;" or age limitations. Respondents were also asked to indicate the likelihood that they would be traveling to Spain within the next three years. Over half indicated that they definitely would not or probably would not be visiting Spain (21.3% and 31%, respectively). Almost a third (31.5%) indicated that they probably would be visiting Spain and 16.2% indicated that they definitely would be visiting Spain.

Respondents were asked that if they were to travel to Spain, whether they would prefer to visit Spain only or visit Spain along with other countries. The majority (84.3%) said that they would prefer to visit Spain along with other countries (Table 20).

Table 18:

Level of Interest in Visiting Spain Within next Three Years

Level of Interest	%
1. Not interested at all	22.0
2. Not too interested	13.0
3. Fairly interested	32.0
4. Very interested	33.0
Total	100.0
Mean	2.8
Standard Deviation	1.1
Median	3.0

Table 19:

Likelihood of visiting Spain

Response	%
1. Definitely will not	21.3
2. Probably will not	31.0
3. Probably will	31.5
4. Definitely will	16.2
Total	100.0
Mean	2.4
Standard Deviation	1.0
Median	2.0

Table 20:
Itinerary Preference^(a)

Preference	%
1. Visit Spain only	15.7
2. Visit Spain along with other countries	84.3
Total	100.0

Note: (a) "If you were to visit Spain would you prefer to go just to Spain or would you rather visit Spain and other countries?"

G. Predictors of Potential Travel to Spain:

One of the main research objectives was to determine which segments of the U.S. "non-travel market to Spain" have the highest potential of becoming travelers.

Potential travel to Spain was defined as the "likelihood to visit Spain in the next three years," and the "level of interest in going to Spain within the next three years."

To accomplish this, the relationships between a set of behavioral, attitudinal, and demographic characteristics and potential to travel to Spain were tested by applying a set of statistical techniques involving multiple regressions, Pearson correlations, analyses of variance and t-tests. Only significant variables are reported.

Please note that three regression analyses were calculated. The dependent variables were (1) level of interest in going to Spain (2) level of likelihood to go to Spain, and since these two variables were correlated ($r=0.64$) - (3) the additive sum of the latter two. The models yielded very low R squares ranging from 0.18 to 0.20, and consequently were not included in the report.

Other significant variables are reported below.

1. Attitudinal Factors:

Table 21 summarizes the attitudinal factors that were found to be correlated with potential of travel to Spain. Only correlations that were greater than 0.20 are reported.

The Table indicates that potential travelers to Spain considered the local Spanish people to be warm, cordial, and charming. They also perceived Spanish people to be hospitable towards American tourists, and did not think that airfares to Spain were expensive relative to other European destinations. They also did not think that Spain was a fascist country, and did not agree that Spain does not have a visible tourist landmark like other European countries. These issues were major areas of concern in the focus group process and were confirmed statistically in the telephone survey.

Table 21:

Correlation between behavioral and attitudinal variables and potential travel to Spain

	Correlation coefficient	
	"level of interest"	"level of likelihood"
1. "Spanish people are warm, cordial, and charming"	n/s	0.20
2. "Spanish people are not hospitable to American tourists"	n/s	-0.20
3. "Compared to other European destinations, the airfare to Spain is very expensive"	n/s	-0.24
4. "Spain is a fascist country"	n/s	-0.27
5. "Spain does not have a highly visible tourist landmark like other European countries"	-0.27	n/s

Note: All correlations are significant at the 0.05 level.

2. Overseas travel behavior:

Respondents who had taken more European trips exhibited a higher likelihood to go to Spain within the next three years ($R=0.21$).

3. Potential travel arrangements to Spain:

Respondents who preferred to travel to Spain exclusively have exhibited higher interest and higher likelihood to go to Spain in the next three years (means= 3.2 and 2.8, respectively) than respondents who preferred to combine the trip to Spain with other countries (means=2.7 and 2.4, respectively).

4. Advertising:

Respondents who heard or saw advertising about Spain were more interested in going to Spain within the next three years (mean=3.0), than respondents who did not see or hear any advertising about Spain (mean=2.6).

5. Demographic Characteristics:

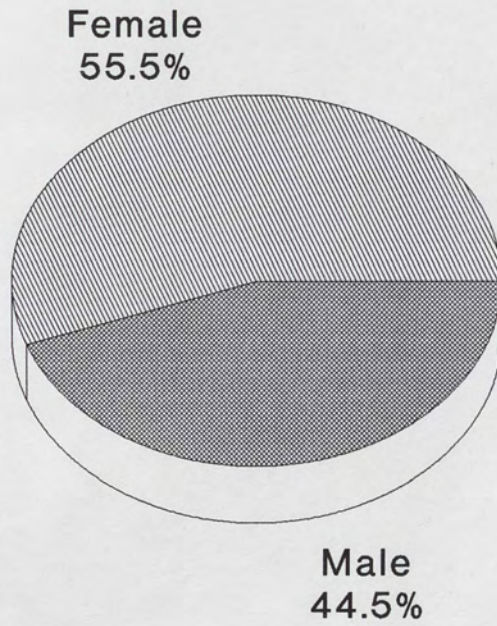
One-way analysis of variance revealed that respondents in the 40-49, 60-69, 30-39, and 18-29 age groups (means= 3.1, 3.0, 2.9, and 2.7, respectively) were more interested in going to Spain within the next three years than the "over 70" age group (mean= 1.8). Please note that the highest potential was recorded among middle age and "young" retirees age groups.

Similar trend was found when the one-way analysis of variance was performed on the level of likelihood to go to Spain. Respondents who were in the 60-69, 40-49, 30-39, and 18-29 had expressed higher likelihood to go to Spain (means= 2.8, 2.5, 2.5, and 2.5, respectively) than respondents in the "over 70" age group.

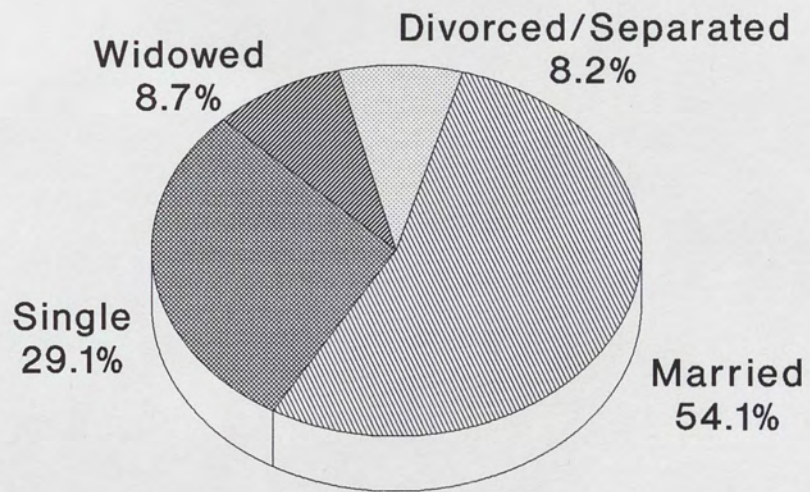
In addition, the motivation to go to Spain varied among different education levels. Respondents who had a college degree were more interested in going to Spain (mean= 3.0) than respondents who had a high school diploma (mean= 2.1).

IV. Appendix

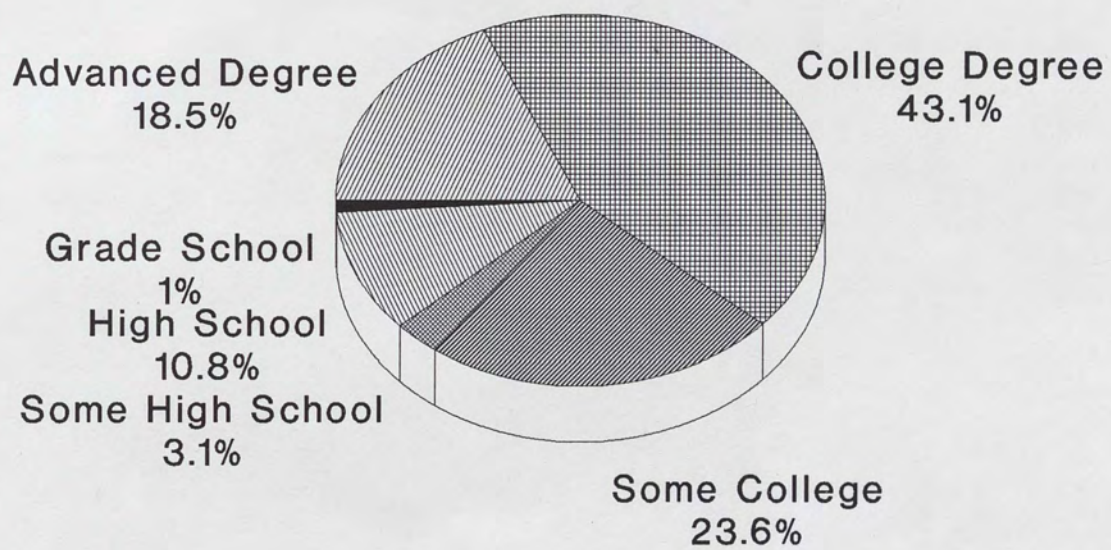
Sex of Respondent



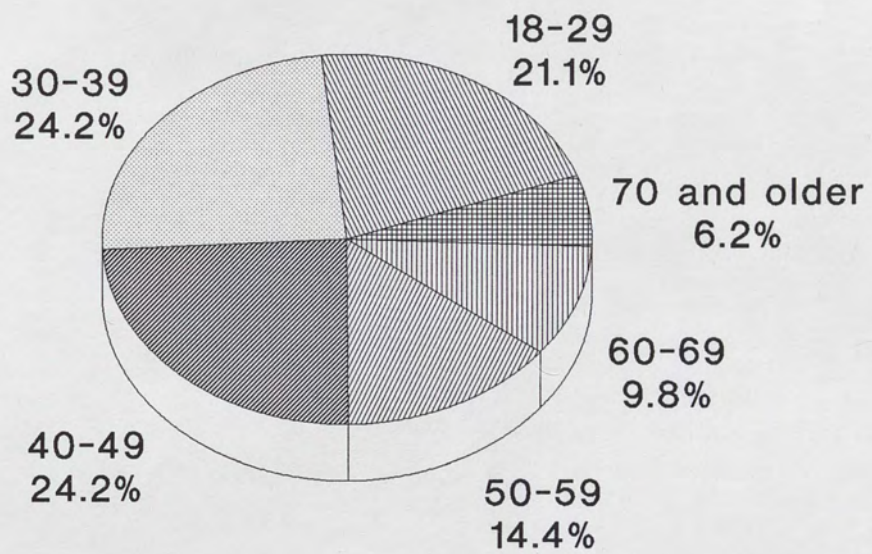
Marital Status of Respondent



Highest Level of Education

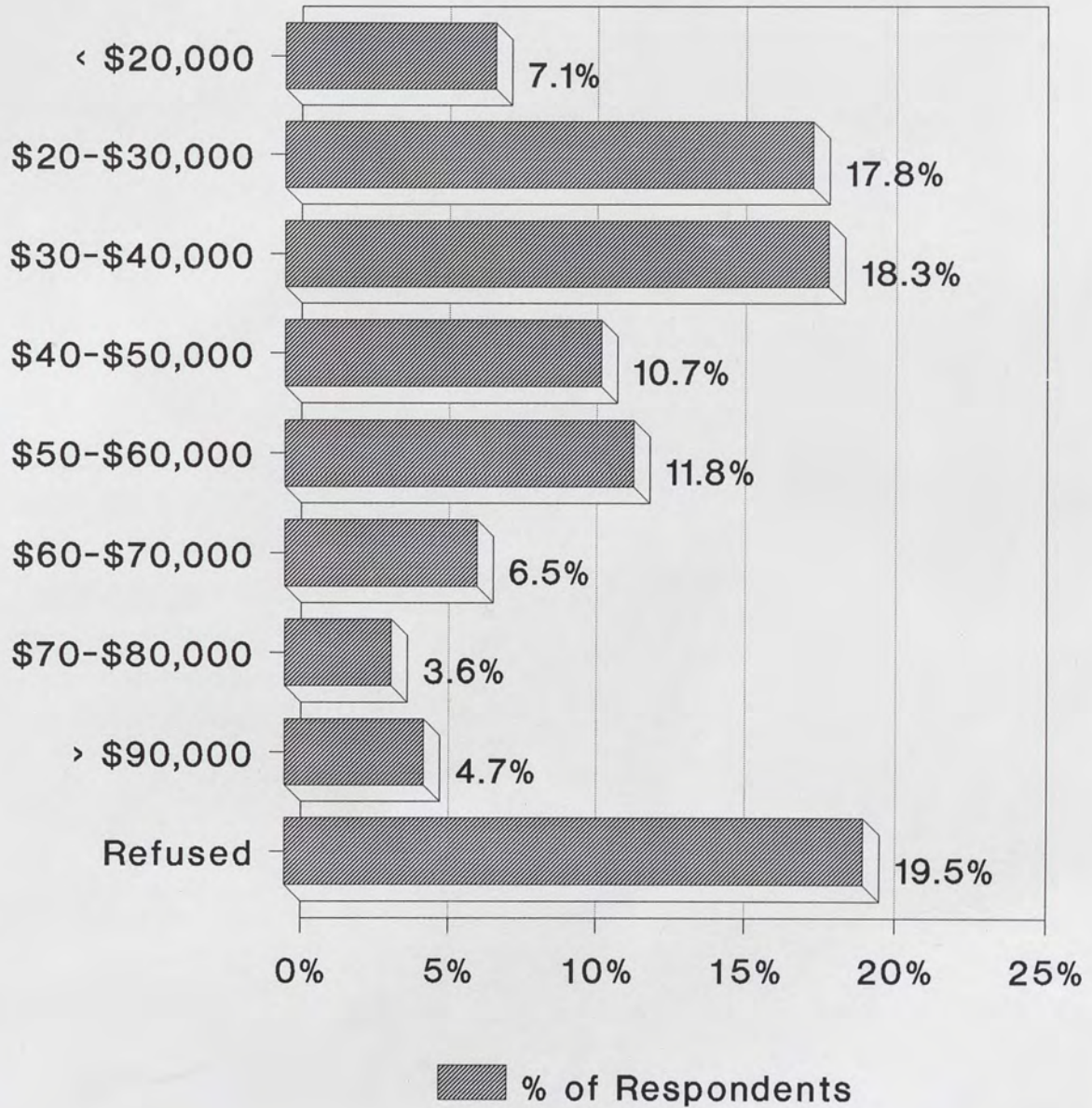


Age of the Respondent

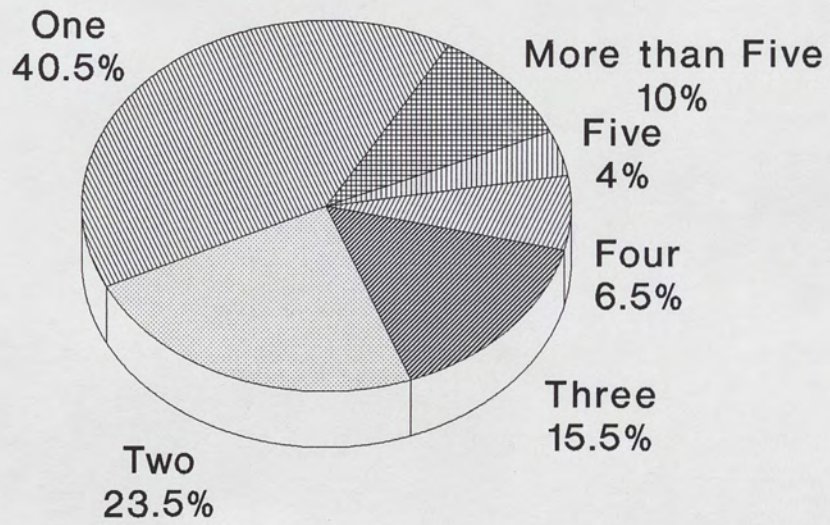


1989 Annual Household Income

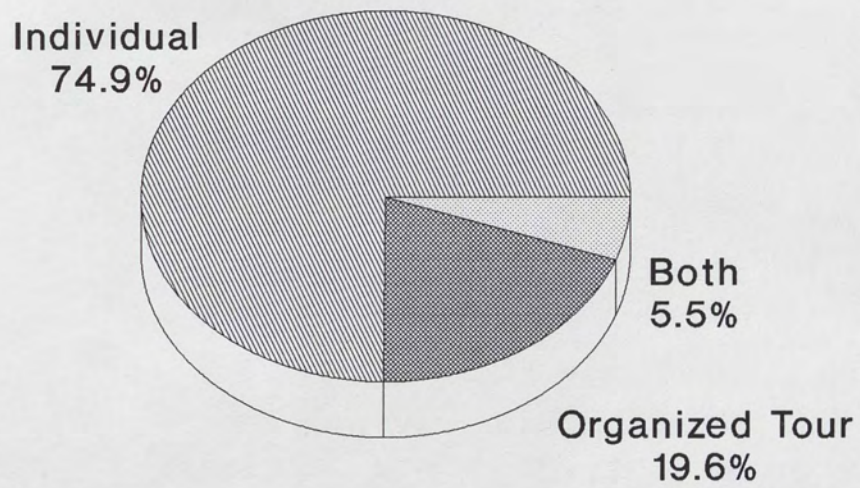
Income



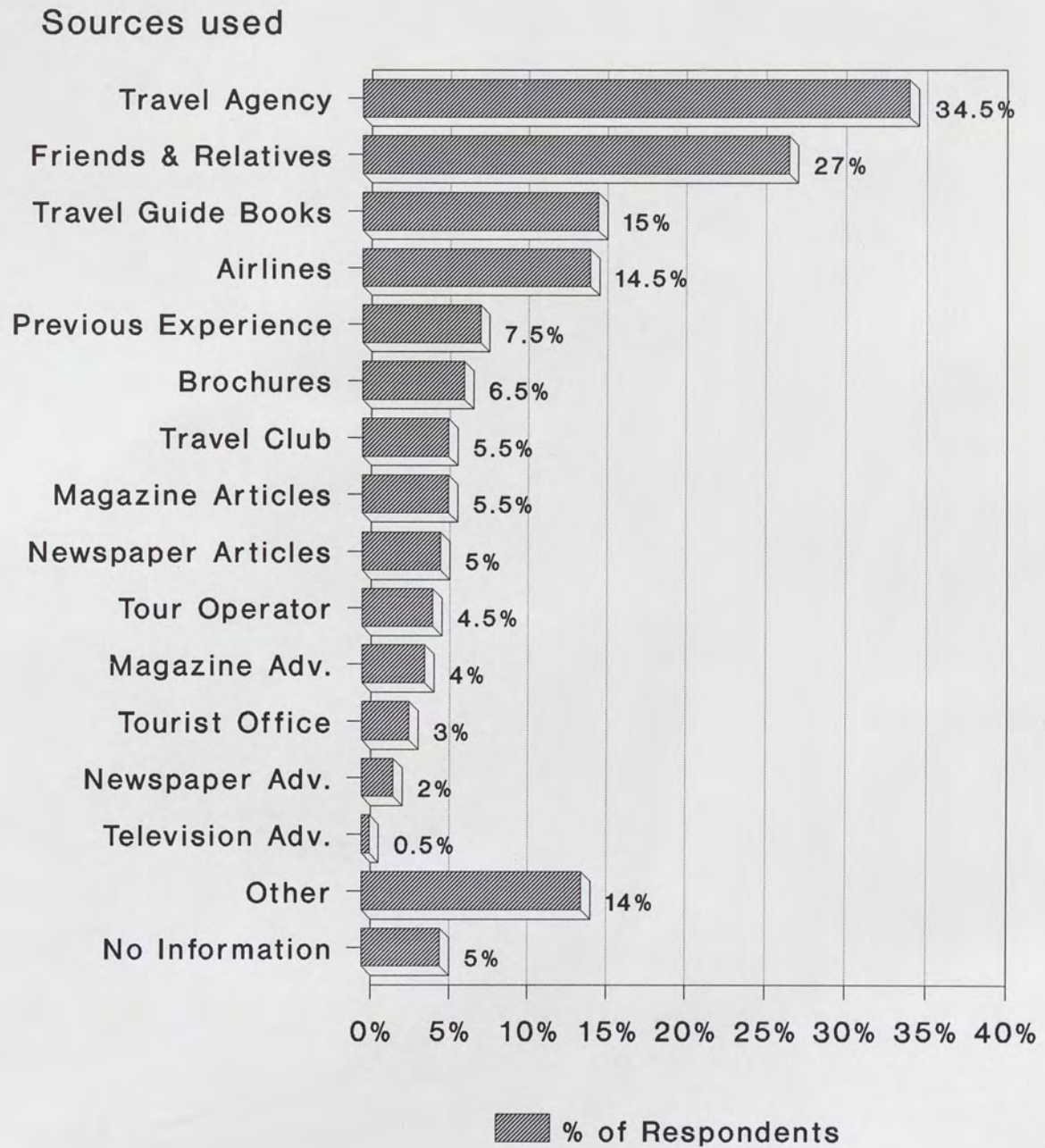
Number of Foreign Trips Taken



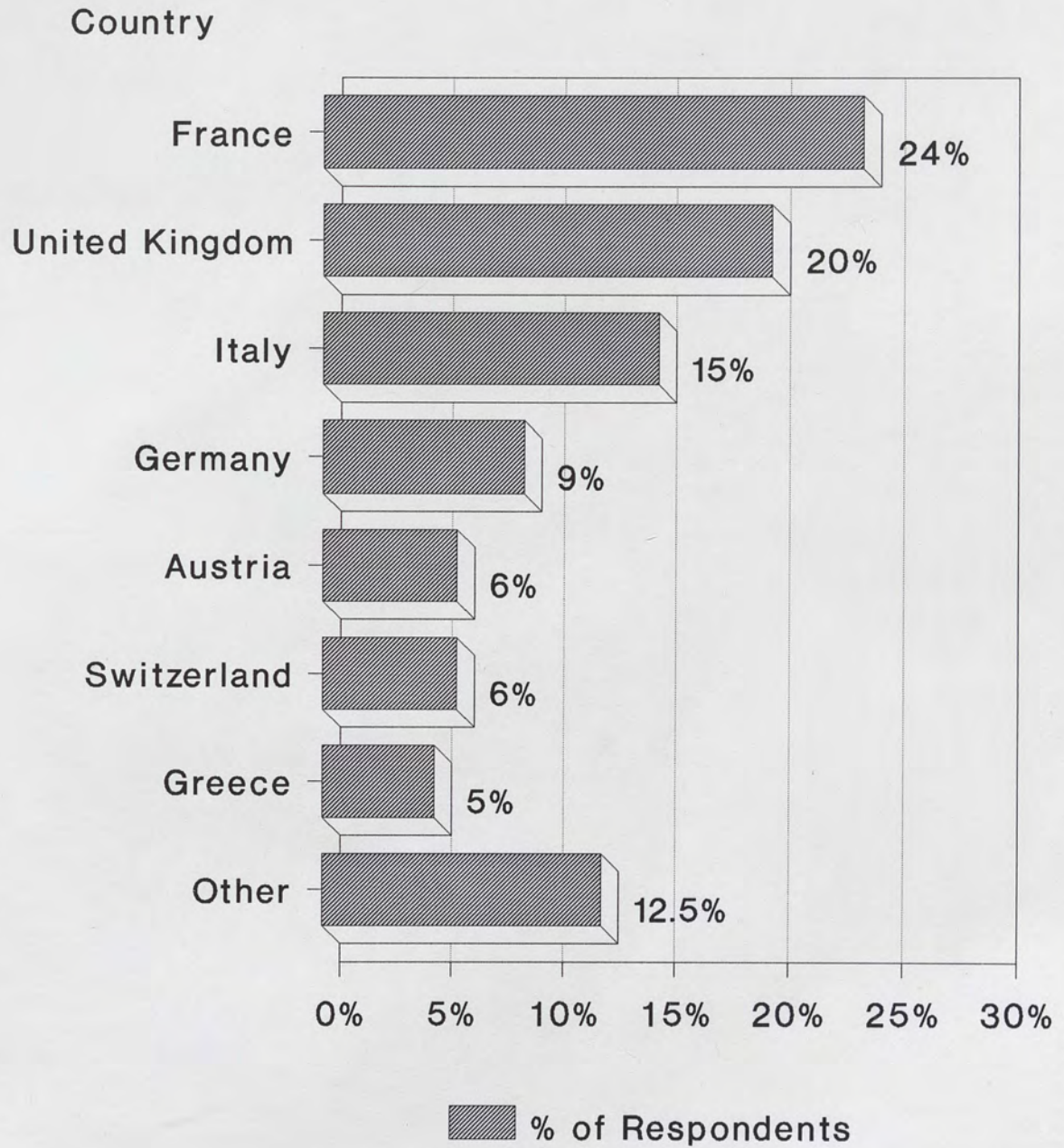
Travel Arrangements



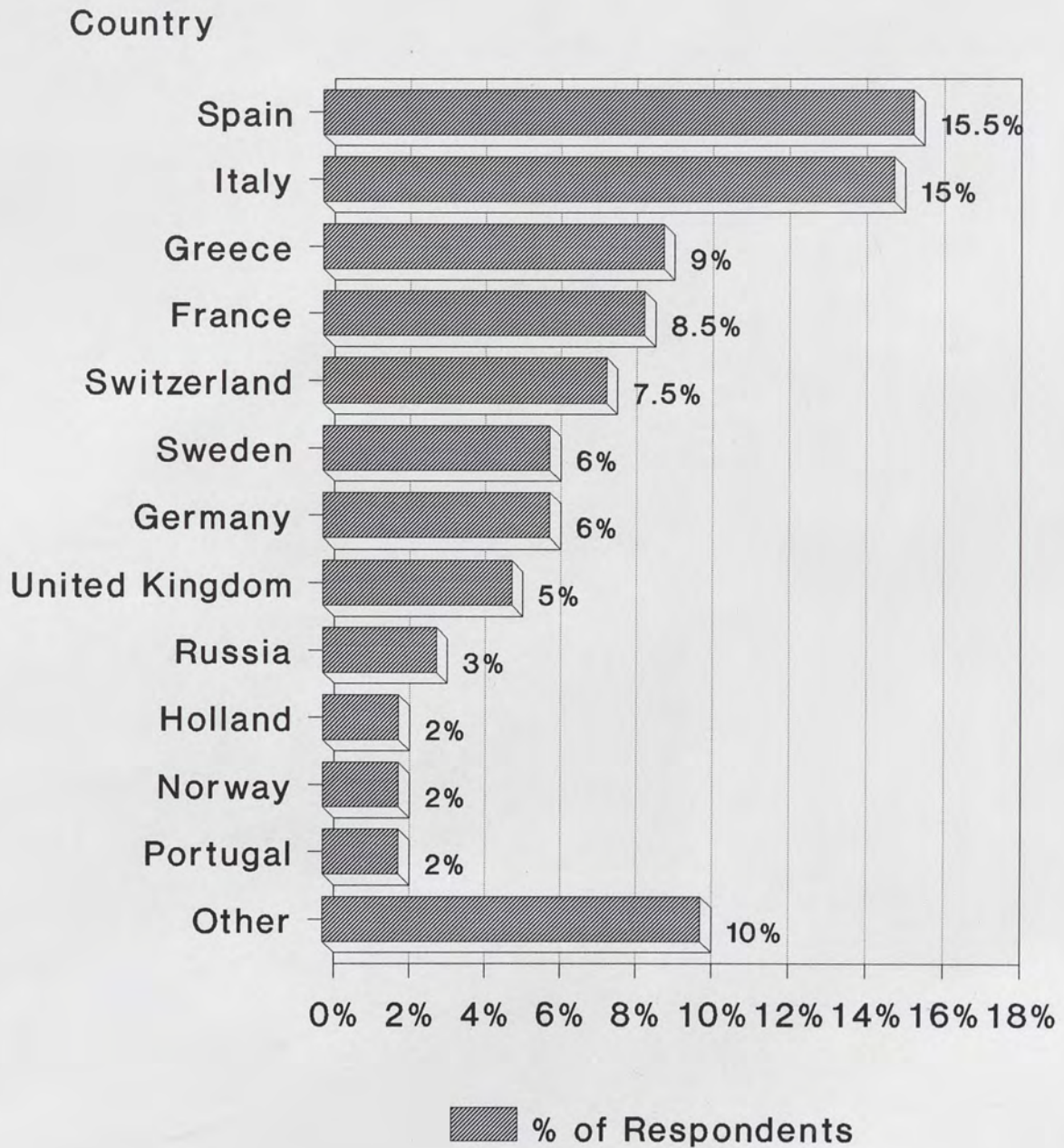
Sources used for planning trips to Europe



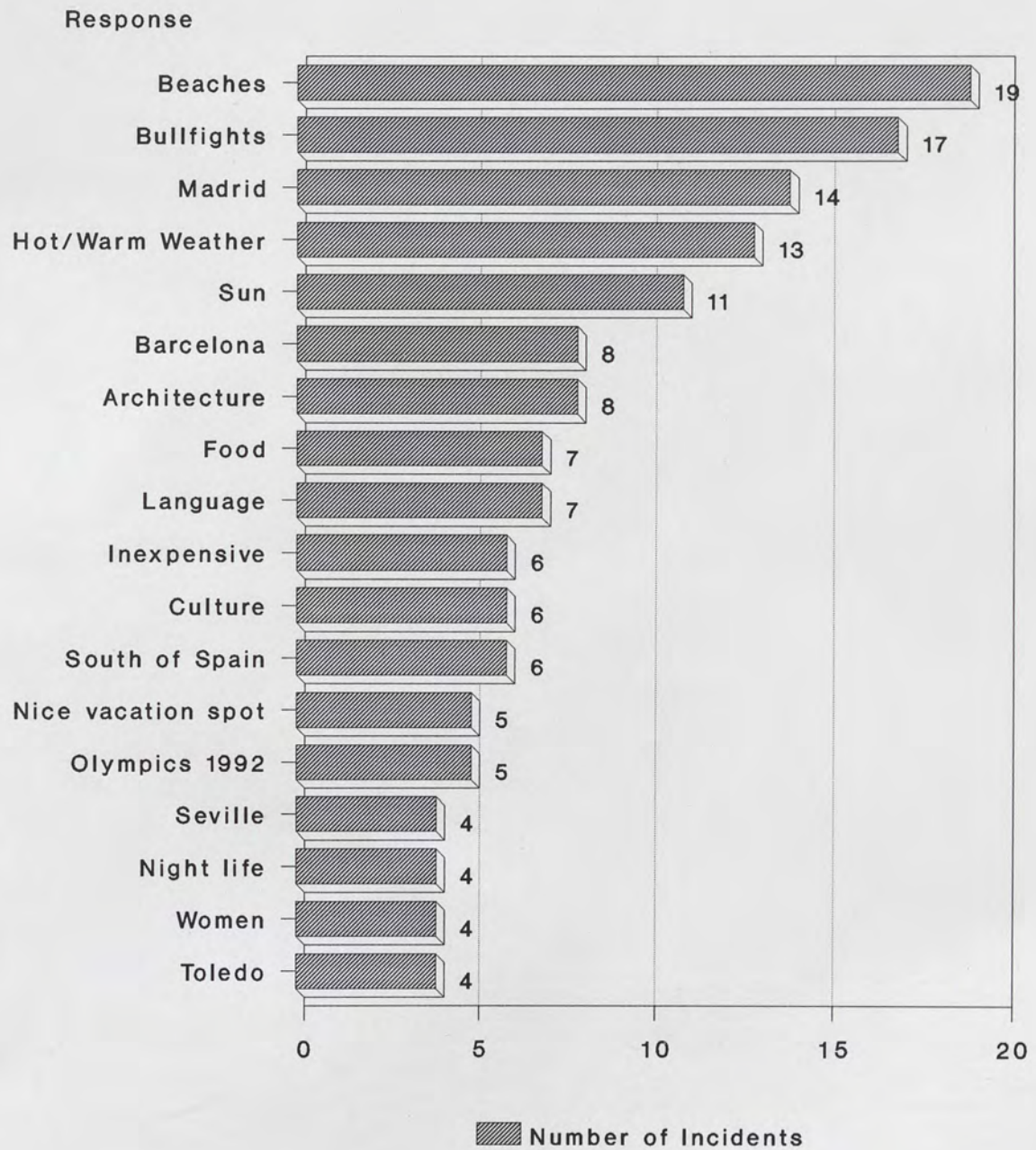
European Country most wished to revisit



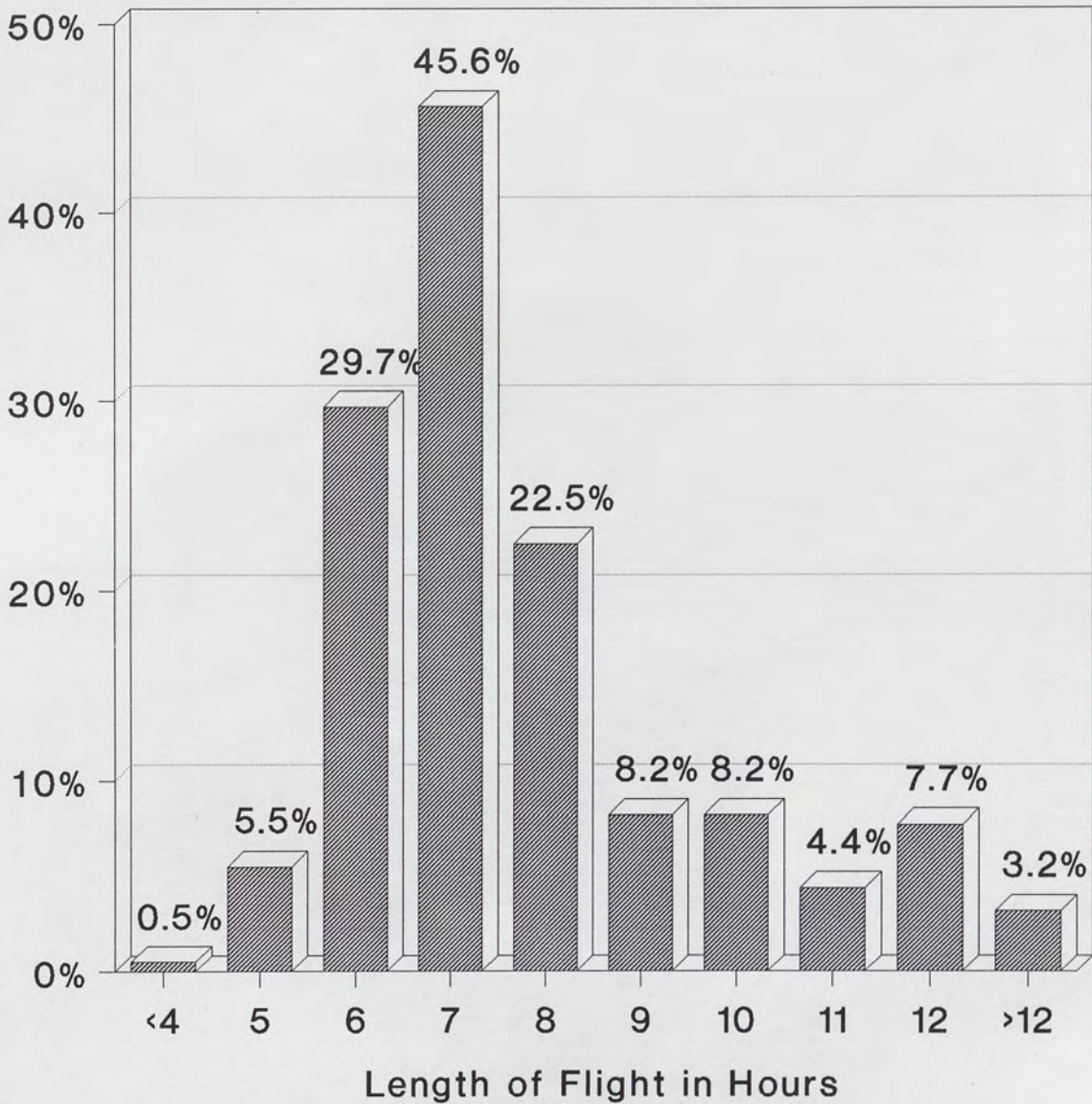
European Country most wished to visit for first time



Perception of Spain as a vacation destination

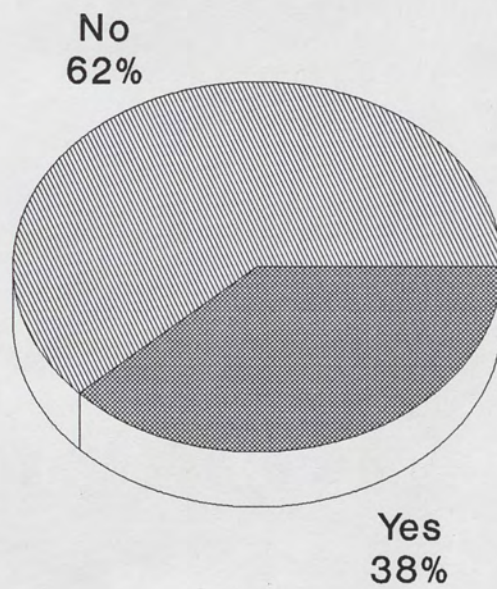


Perceived Length of Flight from New York to Spain



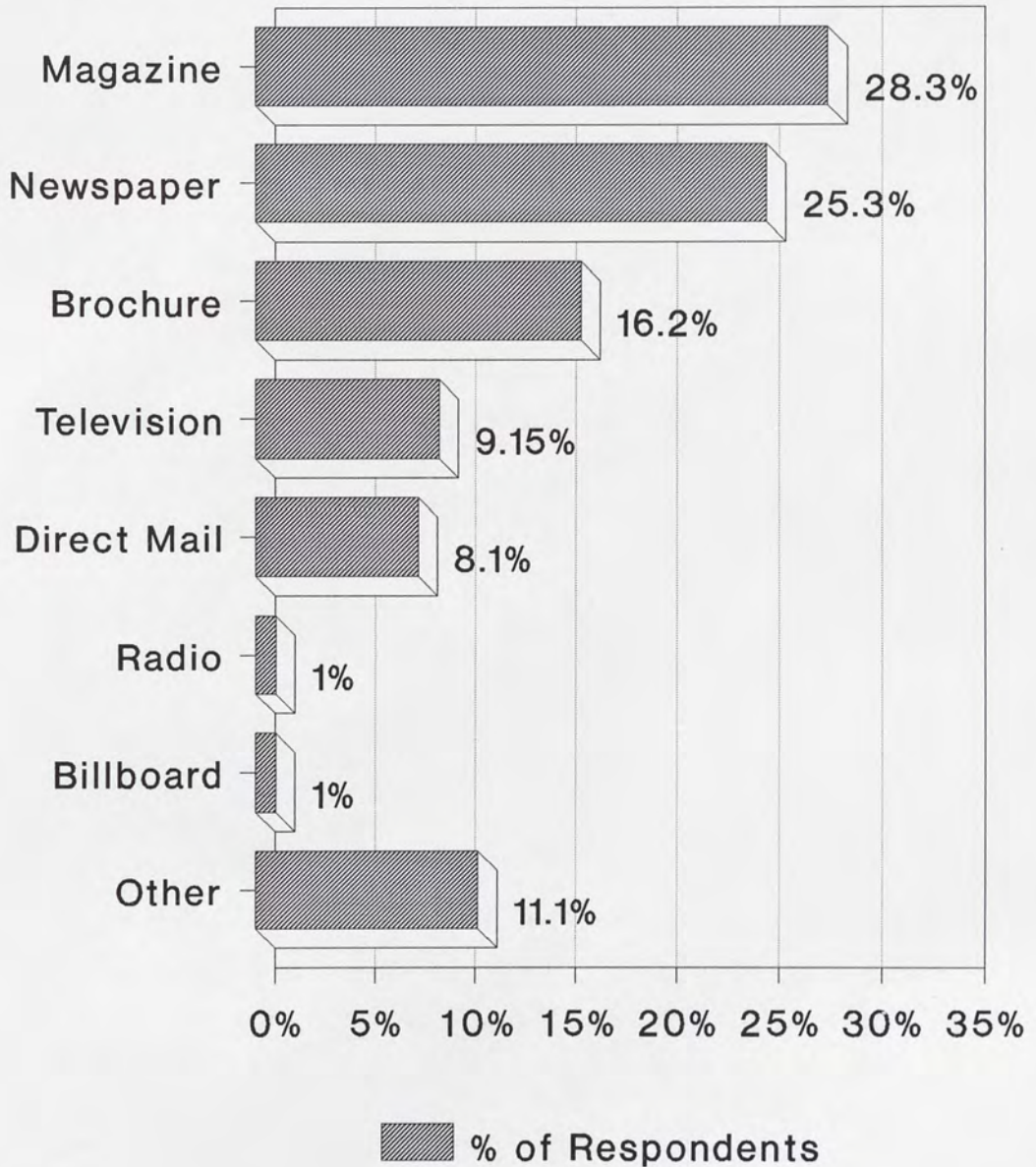
■ % of Respondents

Exposure to Advertising about Spain

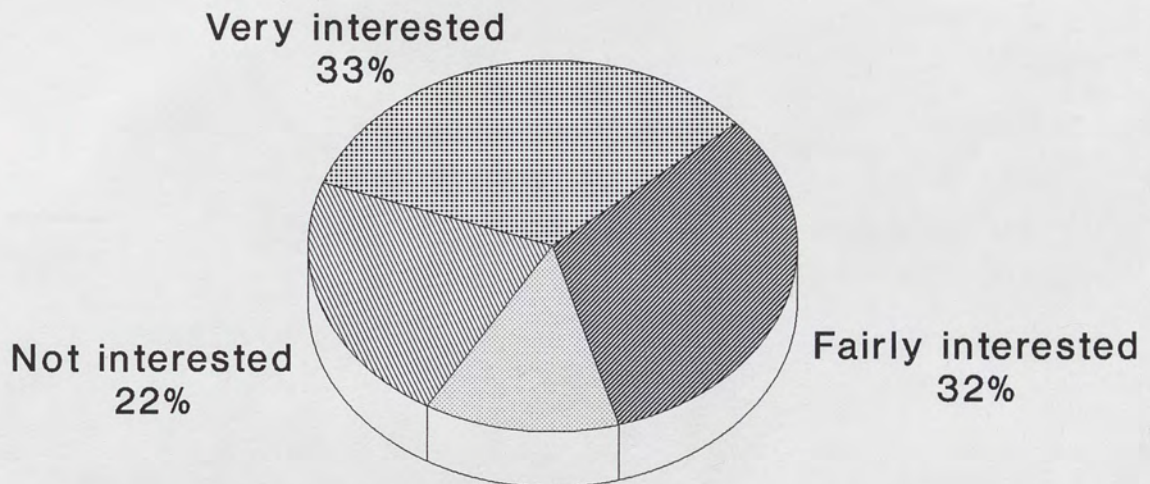


Type of Advertising Seen by Respondents

Advertising Seen



Level of Interest in Visiting Spain Within the next Three Years

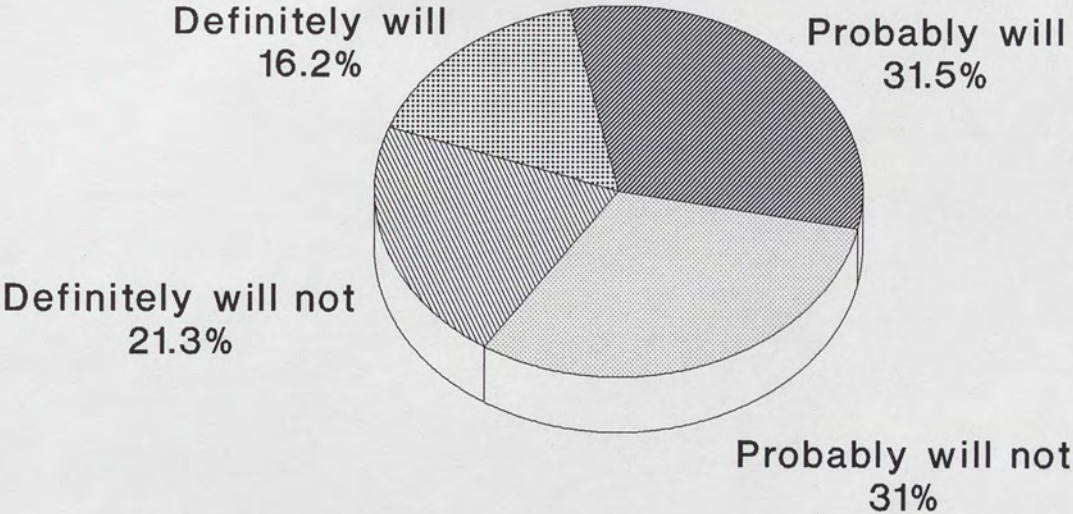


Not too interested
13%

Respondents were not interested because:

- * "would rather visit other places"
- * "already made other plans"
- * "too expensive"
- * "limitations due to old age"

Likelihood of Visiting Spain



Itinerary Preference

