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Abstract

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by
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The U.S. pleasure travel market is enormous and provides Canada with an important and lucrative source of tourist dollars each year. However, during the past five years, U.S. visitors to Canada have failed to regain the peak of nearly 14 million arrivals in 1986.¹ In a recent 1993 *Travel and Tourism Outlook* conference, Colleen Flannery, market research analyst of the U.S. Travel and Tourism Administration, indicated:

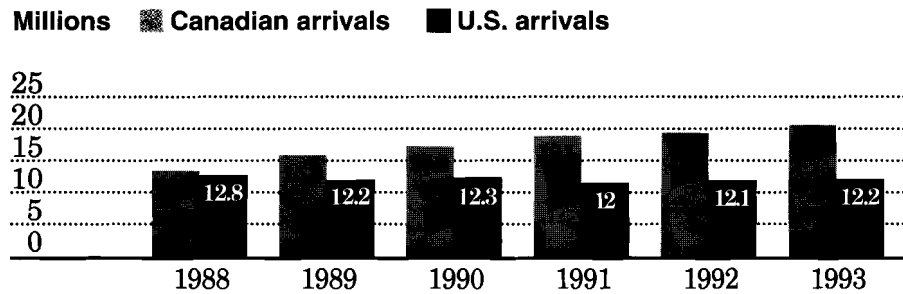
...The outbound picture based on data provided to USTTA from the international travel survey of Statistics Canada, we see a pretty flat situation...Despite the very favorable exchange rate...and the fact that this is our number 2 destination outside the U.S., growth in American travel to Canada is simply not happening. Our last big year of travel to that country was in 1988. Since that time U.S. arrivals have fluttered just above the 12 million mark...²

While Canada ranked top in foreign country advertising expenditure in the U.S. (\$10.71 million in 1990), projections also indicate a flat growth (Figure 1).

The U.S. travel market to Canada is diverse. *The U.S. Travel Market study* concluded that:

...The U.S. pleasure travel market is not one market, but many. U.S. travelers (that) seek different amenities on different occasions, demonstrating once again that variety is the spice of life...eight distinct pleasure travel markets exist in the U.S., each with its own different travel patterns and travel needs, and each defining its own particular set of travel experiences...³

Figure 1
Canadian Arrivals to the U.S. and U.S. Arrivals to Canada:
1988-1993 Comparison



Source: U.S. Travel and Tourism Administration & World Tourism Organization, 1993.

The eight distinct pleasure travel markets are touring (37 percent), visits to friends and relatives (23 percent), outdoors (20 percent), city (8 percent), close-to-home (6 percent), resort (3 percent), theme park (2 percent), and cruise (1 percent).⁴

Graham and Geoffrey's study⁵ of U.S. visitors to Canada revealed four market segments: sightseeing, commercial recreation, water-oriented activities, and outdoor activities. Another Canadian government study of U.S. residents revealed that higher Canadian vacation potential is related to the types of Canadian geographical areas previously visited by U.S. residents, and the activities that these travelers had enjoyed during their vacations. Travelers who enjoyed vacations in wilderness areas, mountains, or near lakes and streams, coupled with activities like fishing, hiking, and scenery, are more likely to visit Canada. On the other hand, U.S. vacationers who historically enjoyed vacations near the oceanside, or shopping and night life, were less likely to have Canadian vacation potential.⁶

Other studies of U.S. Canadian tourism addressed topics like across-the-border travel,⁷ exchange rate,⁸ winter games,⁹ research methodology,¹⁰ forecasting tourism flows,¹¹ and tourism regionalization of the North American continent.¹²

U.S. Regions Generate Tourists to Canada

The regions of New England, the Middle Atlantic, the North Central, and the Pacific have traditionally accounted for the majority of U.S. visitors who stayed at least one night in Canada. Another study of potential U.S. pleasure travel markets for Canada revealed that U.S. travelers who visited Canada and resided in the Northwest and Southwest regions of the United States were likely to have a higher Canadian vacation potential than others.¹³

Research also indicated that the Southeast U.S. constituted a small proportion of the U.S. market to Canada. A study of attitudes of

U.S. residents toward travel to Canada revealed that 57 percent of U.S. residents living in the Southeast may be considered vacationers to Canada; however, the proportion of actual travelers was much lower.¹⁴ In addition, Alberta Travel Survey showed that although 27 percent of Alberta's summer visitors were from the United States, only 2 percent resided in the Southeast seaboard.¹⁵ Furthermore, a 1985 study of foreign pleasure travel by Americans revealed that geographic residency influenced the selection of a foreign destination. While the South Atlantic was a major source of travelers to the Caribbean, Europe, and Mexico, only a small proportion (18.2 percent) traveled to Canada.¹⁶

Travel patterns of Canadians to the United States are different. Although over one half of the travel activity from Canada to the United States is to border states (mainly New York and Washington), Florida ranked second to New York as a non-border destination for Canadians.¹⁷

The phenomenon of Canadian outbound travel to warm-weather destinations is not only characterized by long average stays, but also by ownership of second homes and condominiums. For years, Canada sent more tourists to Florida than to any other country outside the U.S. In 1991, 2.35 million Canadians visited Florida, spending over \$1.7 billion.¹⁸ Florida's rapidly increasing population can be a potential market for Canada that should be studied carefully. Unlike Canadians who annually migrate to warm weather spots, Floridians do not have a similar motivation to travel to Canada. For Floridians, the distance between Florida and Canada may play an important decision role in choosing Canada as a vacation destination. While U.S. residents along the Canadian border have to travel about 100 miles to a Canadian destination, Floridians have to travel over 1000 miles to the nearest Canadian destination.

The primary objective of this study was to analyze the existing and potential Florida-resident travel market to Canada. This was achieved through the study of Florida's travel market, its perceptions of Canada as a vacation destination, and the likelihood of Floridians to vacation there.

Floridians Are Survey Target

The study was launched with a focus group¹⁹ of Florida residents who discussed their perceptions about out-of-state travel and, in particular, vacationing in Canada. The focus group generated about 100 themes that described Canada as a vacation destination. Development of a 102-item self-administered structured questionnaire followed. A random sample of Florida residents was selected in a few Central Florida shopping malls. To take part in the study, respondents had to be adult heads of households (male or female over 18) who were permanent Florida residents and had taken at least one overnight trip outside Florida in the past three years. The latter screening was necessary to eliminate respondents whose propensity to travel was very low.

A total of 695 adults were intercepted during a period of one week. After eliminating 445 who did not qualify or refused to be interviewed, a sample of 250 respondents was obtained to yield a response rate of 78.1 percent. Respondents completed the questionnaire in an average of 11.5 minutes.

Almost one-half the respondents had lived in Florida for over 10 years (49.2 percent). They held a college degree (57.3 percent), and their median age was between 40 and 49 years; 51 percent were male. Most respondents were married (62.3 percent) and had no children under 18 living in their household (78.9 percent). Respondents who had children living with them reported an average of one child. Median annual income was \$30,000 to \$40,000, and the majority (58.7 percent) did not speak any foreign language. Those who spoke other languages were fluent in Spanish (20 percent), French (12.3 percent), and German (8.1 percent).

Florida residents have taken an average of 3.8 vacation trips in the past three years, 3.1 trips in the United States, and 1.6 to foreign destinations. Time of year included the summer (37.2 percent), "any season" (28 percent), the spring (13.2 percent), the winter (13.2 percent), or the fall (10 percent). The median length of vacations was eight to 14 days.

Most Prefer to Plan Trips Themselves

The majority of respondents preferred to take an individually-planned vacation trip rather than an organized tour (79.6 percent vs. 3.6 percent, respectively). The remaining preferred both arrangements equally (16.8 percent).

Floridians usually made plans for their vacation trip two to three months prior to their departure date. A small proportion of respondents (12.8 percent) planned their vacation within a two-week period prior to their departure, while about 8.8 percent planned their vacation trip six months ahead.

Friends and relatives (41.8 percent), travel agencies (37.1 percent), and previous experience at the destination (34.2 percent) were the major sources used by Floridians for obtaining travel information. Media advertising like radio (1.3 percent), TV (3.8 percent), newspapers (7.2 percent), or magazines (8.5 percent) were not reported as significant sources of travel information. (See Table 1).

In a large proportion of the households, the decision of where to go on vacation was equally shared by both the male and female members of the household (44.8 percent of the time). In other households, either the female (20.8 percent) or male (15.6 percent) was quite instrumental in choosing where to go on vacation.

Many Are Familiar with Canada For Vacations

Two-thirds of respondents (66.4 percent) visited Canada at least once. To evaluate respondents' distance perception from Florida to Canada, they were asked to estimate the duration of the flight between Central Florida (Orlando) and major Canadian cities. A new

Table 1
Information Sources Usually Used for Travel Information

Information Sources	%
1. Friends and relatives	41.8
2. Travel agency	37.1
3. Previous experience at the destination	34.2
4. Airline	29.1
5. Brochures of destinations	27.8
6. Travel club (like AAA, Allstate)	19.4
7. Travel guide books	16.5
8. Magazine articles	14.3
9. Newspaper articles	10.1
10. Magazine advertising	8.5
11. Newspaper advertising	7.2
12. TV advertising	3.8
13. Radio advertising	1.3
14. Tour operator	0.8
15. Other	7.6

Note: Total percentages exceed 100 percent due to multiple responses

variable was created to measure the difference between actual and perceived duration of flight between Central Florida and the four Canadian cities.

For example, respondents perceived Montreal to be 4.3 flight hours away from Orlando, when it is actually 2.4 hours away. Likewise, Toronto was perceived to be 4.3 flight hours away, when it is actually 2.1 hours away. Calgary was perceived to be 5.6 hours away (actually 4.4 hours away), and Vancouver was perceived to be 6.1 hours away (actually 5.1 hours away). Calculations were based on Delta Airlines' air mileage and average cruising speed. Florida residents perceived Canadian cities to be further (in terms of flying time) than their actual distance.

Respondents were asked to express their agreement or disagreement with various statements regarding Canada as a vacation destination. The statements were derived from the focus group discussions. For each of the 19 statements, respondents were asked to assign a value from "1" to "5," where "1" represented strong disagreement and "5" strong agreement with the statement.

Findings revealed that Florida residents perceived Canada's cities to be an interesting vacation experience. They also perceived Canada as a land of mountains and lakes, and a place to enjoy night life, good restaurants, dancing, and entertainment. Respondents also thought that Canada was best known for its outdoor vacation activities like

Table 2
Perception of Canada as A Vacation Destination:
The Florida Resident Perspective

Statement	Mean ^(*)	Std Dev
1. Canadian cities provide a very interesting vacation experience	3.9	0.7
2. Canada is a land of mountains and lakes	3.8	0.9
3. Canada is a place where you can enjoy night life, good restaurants, dancing, and entertainment	3.7	0.8
4. Canada is best known for its outdoor vacation activities like fishing, hunting, camping, or rafting	3.7	0.8
5. Skiing in Canada is a great experience	3.5	0.8
6. The Canadian passenger rail system is very efficient	3.4	0.7
7. I would go to Canada to see Niagara Falls	3.3	1.2
8. Canada offers great shopping bargains	3.3	0.8
9. Vacationing in Canada is like vacationing in the U.S.	3.0	1.0
10. Canada has beautiful beaches	3.0	0.8
11. In Canada, the French culture can be found almost everywhere	2.9	1.0
12. Vacationing in Canada is like vacationing in Europe	2.8	0.8
13. The food in Canada is very different from the food in the U.S.	2.7	0.8
14. In Canada you can drive for hours and see the same scenery	2.7	1.0
15. The U.S. dollar doesn't buy much in Canada	2.4	1.0
16. Canadians are inhospitable	2.2	1.0
17. Canada is cold year-round	2.1	0.9
18. Compared with the U.S.A., Canada is dirty	2.1	1.0
19. Canada is a boring place to visit	2.0	1.0

Note: 1 represents strongly disagree and 5 strongly agree.

fishing, hunting, camping or rafting, and that skiing in Canada is a great experience. These findings are consistent with the results of the *Potential Pleasure Market for Canada in the U.S.* study.²⁰ Florida residents did not perceive Canada to be "a boring place to visit," cold year-round, dirty compared to the U.S., or inhospitable (See Table 2).

To find out whether the perceptions of Canada as a vacation destination varied between Florida residents who had visited Canada and those who did not visit Canada, a t-test was conducted to determine whether the means of the two resident groups differed. Table 3 indicates that the means of the two groups differ in 12 out of the 19 statements about Canada summarized in Table 2.

Table 3
T-test between Visitors and Non-Visitors to Canada
Regarding their Perception of Canada as a Vacation Destination

Statement	Visitors Mean ^(*)	Non-visitors Mean ^(*)	T value ^(**)
1. Canada cities provide a very interesting vacation experience	4.0	3.7	3.19
2. Canada is a place where you can enjoy night life, good restaurants, dancing, and entertainment	3.8	3.5	3.58
3. The Canadian passenger rail system is very efficient	3.5	3.2	3.89
4. Canada offers great shopping bargains	3.4	3.1	2.79
5. In Canada, the French culture can be found almost everywhere	2.8	3.1	2.36
6. The food in Canada is very different from the food in the U.S.	2.6	2.8	2.46
7. In Canada you can drive for hours and see the same scenery	2.6	2.9	2.33
8. The U.S. dollar doesn't buy much in Canada	2.3	2.7	2.98
9. Canadians are inhospitable	2.1	2.4	2.81
10. Canada is cold year-round	1.9	2.5	4.50
11. Compared to the U.S.A., Canada is dirty	1.9	2.5	4.24
12. Canada is a boring place to visit	1.9	2.2	2.24

Note: 1 represents strongly disagree and 5 strongly agree.

()** Significant at the 0.05 level.

Floridians who had visited Canada exhibited more favorable attitudes toward Canadians' hospitality, Canada's cold weather, cleanliness, and its image as a "non-boring" destination than Floridians who had never visited Canada. Floridians who had visited Canada also perceived it to be more a place to enjoy interesting cities and night life, and also offering efficient rail service and shopping bargains.

However, Florida residents who had not visited Canada perceived the French culture in Canada to be more dominant, the food to be more different than in the U.S., and the scenery to be more monotonous than previous visitors to Canada thought. Non-visitors also perceived the U.S. dollar to be less valuable in Canada than previous visitors did. Previous visitors to Canada not only had more favorable attitudes about the country and its tourist attractions, but were also more knowledgeable about the Canadian travel experience, including food, scenery, weather, or currency (See Table 3).

Visits to Canada Rank High For the Future

A large population of respondents were "very interested" (33.1 percent) or "fairly interested" (45.5 percent) in visiting Canada within the next three years. Only 14.9 percent of the respondents were "not too interested," or "not interested at all" (6.5 percent). Respondents who were not interested in visiting Canada were asked why they wouldn't be interested in going. Although the number of responses to this question was relatively low, a large proportion of those who responded said that they had "already been to Canada" (36 percent), that they "would like to see the U.S. first" (24 percent), and that they would rather go to "warm climate destinations" (20 percent). A relatively small proportion of the respondents (12 percent) also said that they were not exposed to enough information about Canada.

Furthermore, although Floridians exhibited a high interest in Canada, only a small proportion of the respondents exhibited propensity to transform it into actual behavior by stating that they would definitely visit Canada within the next three years (14.5 percent); 41.3 percent said that they would "probably will," and the rest (44.2 percent) said that they would "probably will not" or "definitely will not" visit Canada within the next three years.

To determine which segments of the Florida travel market have the highest potential to vacation in Canada, two sets of multiple regression models were conducted. The two dependent variables were "level of interest in going to Canada within the next three years" and "likelihood to visit Canada in the next three years." The independent variables consisted of all the behavioral, attitudinal, and demographic characteristics. The two predictive models yielded a low R square (0.26 and 0.22, respectively) and, therefore, will not be reported.

To identify potential travelers to Canada, a Pearson correlation was calculated between each of the behavioral, attitudinal, and demographic variables and the two dependent variables representing interest and likelihood to visit Canada. The findings revealed higher correlations between the latter variables. Table 4 summarizes the correlation coefficients between the likelihood to visit Canada and a set of variables that exhibited statistically significant correlation coefficient greater than 0.15.

In general, Florida residents interested in Canadian cities, shopping bargains, night life, and a good value for the U.S. dollar were more likely to go to Canada. These potential travelers did not perceive Canada to be boring, cold, and inhospitable.

In addition, older Florida residents were more likely to travel to Canada. These findings are consistent with a 1985 study concluding that Canada appealed to an older market than the total U.S. vacation market.²¹ Furthermore, Florida residents who usually take longer vacation trips are more likely to go to Canada. Established Florida residents (in terms of length of time that they lived in the state) were less likely to go to Canada. However, new migrants who did not live in the Sunshine State for a long time were more likely to go.

Table 4
Correlation between Attitudinal, Behavioral, and Demographic Variables and Likelihood to Visit Canada in the Next Three Years

Variable	Pearson Correlation Coefficient
Attitudinal Variables:	
Canada cities provide an interesting vacation experience	0.29
Canada is a boring place to visit	-0.28
U.S. dollar doesn't buy much in Canada	-0.28
Canadians are inhospitable	-0.27
Canada is cold year-round	-0.24
Canada offers great shopping bargains	0.23
Canada is a place where you can enjoy night life, good restaurants, dancing...	0.23
Behavioral Variables:	
Average length of vacation trips	0.22
Demographic Variables:	
Age of the respondent	0.17
Number of years the respondent lived in Florida	-0.16

Some relationships also emerged between the perceived distance of Canada from Florida and the level of interest or likelihood to visit Canada. Pearson correlation coefficients were calculated between "level of interest" and "level of likelihood" to visit Canada in the next three years, and the difference or variability between actual and perceived distance. The greater the variability, or difference, between the actual and perceived length of flight to Canada, the smaller the interest or likelihood to visit Canada. This is another piece of evidence that lack of knowledge or accurate information about a potential destination may hinder travel there.

While current statistics about the number of Floridians traveling to Canada are not available, it is clear that unequal balance of tourists flows between Florida and Canada exist. Canada is counting heavily on the U.S. tourist market to bring its travel deficit down in its marketing of non-traditional markets throughout the U.S. This may be a first step to increase tourist flows to Canada.

It is recommended that the Canadian government and private tourism industry increase their promotional efforts to meet this goal. Word of mouth advertising campaigns, travel agents, and the encouragement of repeat visitors may be appropriate strategies. Target markets should be city lovers, shoppers, and tourists who seek good value for their dollar in foreign countries. Experienced travelers,

older people, and relatively new migrants to Florida may also be a successful market.

A coordinated approach by the Canadian government and the private sector is essential to effective advertising and other marketing campaigns in attracting tourists from Florida and other non-traditional potential markets. This approach will reduce duplicated efforts and avoid presentation of conflicting or confusing messages about Canada as a tourist destination.

The close economic relationships between Canada and the U.S. call for investigating not only trade issues concerned with goods and funds, but also tourism issues, which are likewise important to the North American economy.

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