



2019 CNSJF

A tantalizing entertainment
experience benefiting
Curacao's economy.





UNIVERSITY OF
CENTRAL FLORIDA



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The Dick Pope Sr. Institute *for* Tourism Studies
Rosen College of Hospitality Management
University of Central Florida
9907 Universal Boulevard
Orlando, Florida 32819
Main Investigators:

Manuel A. Rivera, Ph.D.

Robertico Croes, Ph.D.

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Executive Summary

The 2019 Curaçao North Sea Jazz Festival (CNSJF) was held during the U.S. Labor Day Weekend between August 29 and August 31. The festival has generated beautiful memories for many and is a compelling magnet for bringing people together. Its sizeable economic contribution, promotional value, and its appeal to new and affluent market segments are the most significant benefits of the CNSJF to the destination. These gripping results make the festival the flagship platform shaping Curaçao's future.

The festival attracted 5,008 international attendees, which spent US\$2,522 per trip per person, and US\$413 per day per person. Spending per person was 10.3% higher compared to spending at the 2018 festival when spending per day per person was US\$343, and 33% more than 2015 (US\$311). This spending per person per day is twice as high as the average tourist spending per day (US\$171.00).

The 2019 CNSJF's total direct spending is estimated at US\$11,005,669, while the total economic contribution of the festival to the island's economy is US\$17,121,099. The festival's overall contribution to the island's economy represents two days of Curaçao's GDP output.

The promotional value of the festival is immense, reaching, by one account of the CTB, 22 million potential households in Latin America alone.

Respondents reported that they have a secure emotional connection with the festival expressing brand commitment and loyalty. The festival clearly fulfills the needs of international respondents. Similarly to previous years, overall satisfaction scores exceeded 90%, which is an impressive accomplishment. Respondents' behavioral intentions were also firm revealing intention to return and to recommend the festival to others.





Introduction

The title of the report reveals the meaning of the festival to the attendees and Curaçao. The festival reveals a premium value for international visitors (which reflects the concept of tantalizing); the festival brings people together cutting across time by uniting generations; and the festival generates significant economic benefit to the island's people. The quality of the festival and its memorable impact reveal the power of music as a catalyst that brings people together and unites them through their love of music and an enjoyable experience. The festival serves as a platform to drive income change benefiting Curaçao.

The ninth edition of the Curaçao North Sea Jazz Festival (CNSJF) was held during the U.S. Labor Weekend between August 29 and August 31, 2019. The festival took place at its traditional venue, the Curaçao World Trade Center. This year's festival offered, similar to the previous year, a unique promotion with one free admission to a show on Thursday night (August 29) featuring Juan Luis Guerra and Aimee Nuviola. The festival featured its customary super artists' line-up, which this year included, among others, Maroon 5, Mariah Carey, Pitt Bull, Kenny G, Michael McDonald, David Sandborn, Gladys Knight, Third World, and Nicky Jam. These artists performed on three stages, namely Sam Cooke, Celia, and Sir Duke.

The CNSJF has been sponsored and organized by Fundashon Bon Intenshon (FBI), a local foundation established in Curaçao [1]. 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 most significant 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 productions and marketing of events.

The festival is a tremendous source of income, promotion, and pull for new and affluent tourists to Curaçao. Over its nine years, the festival attracted thousands of new tourists to the destination who have steadily has increased their loyalty to the destination. Its impact on the destination promotional value is sizeable. For example, according to the Curaçao Tourist Board (CTB), ten TV stations in Latin America broadcasted 22 packages related to CNSJF, with over 42 minutes on air, reaching over 22 million potential households in those countries. This distribution had a value of US\$1.3 million in promotion [2]. The festival is the hallmark event of the destination and has become the most prestigious and celebrated event in the Caribbean region.

This report documents attendees' experience during and after the consumption of the festival and the host destination. The report also reveals the economic benefits for Curaçao because of the festival attendees spending. The survey instrument includes visitors' experiences, behavioral expectations, and spending. A festival-scape and behavioral intention perspectives, and an Input-output model framed the analysis. The report is organized: survey and data collection, profiling, behavioral intentions, experience, satisfaction, and economic impact.

[1] The festival was co-sponsored by the Curaçao Tourist Board (CTB), Maduro & Curiel's Bank (MCB), Curacao Airport Partners (CAP), and Heineken.

[2] Email from the Deputy Director of the CTB dated September 12, 2019.





Survey and Data



Several general research issues were reviewed, including a sampling of attendees, questionnaire design, and economic assessment. The study followed a systematic approach to festival policy or evaluation to facilitate festival evaluation to increase comparability, and support strategic decisions.

The study applied a survey instrument stemming from a theoretical framework founded on “the experience economy” that reflects the overall experience at a music festival [3]. This framework is relevant in assessing the offerings for event attendees to gauge the satisfaction level of attendees and provides an understanding of the attendees' decision-making processes. The survey design also included the input-output framework to estimate the total economic impact of the festival.

The survey contains predictors relevant to a music festival. The study queries how attendees evaluate their experience at the festival; isolates their demographic profile; identifies their satisfaction levels; and discovers whether they will return or provide a referral (behavioral characteristics) to prospective attendees.

The UCF team enlisted the assistance of the CTB through Christine Campagnard and recruited ten experienced canvassers to administer surveys only to tourists attending the festival. The sampling procedure involved a convenience sample of international visitors attending the festival, and the sample size consisted of 415 respondents (47% male and 53% female) [4]. The sample represents 8.3% of the tourists who attended the festival.

[3] 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.

[4] Convenience sampling is a type of sampling that involves getting participants wherever you can find them and typically wherever is convenient.



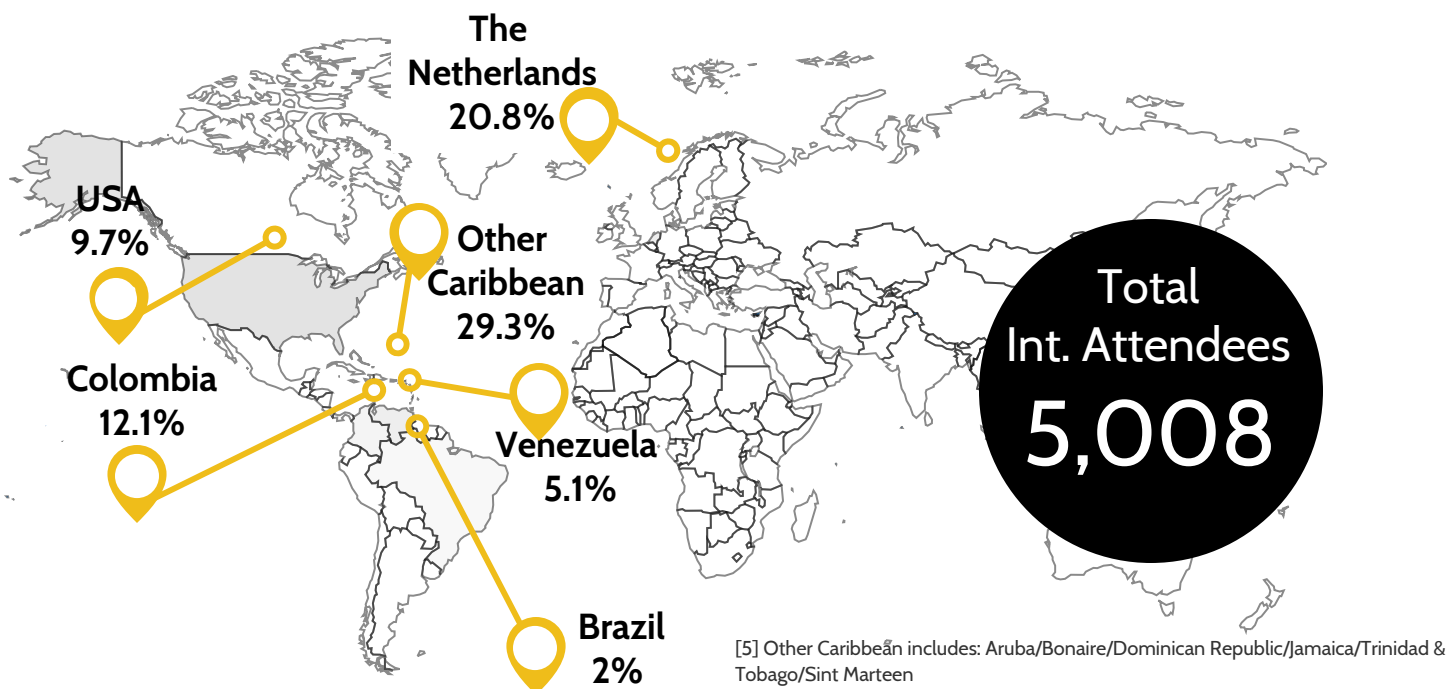


2019 Attendance

The CNSJF hosted 5,008 international visitors. The overwhelming majority –nearly 70%, visited Curaçao before, and 63% had attended the festival before. Nearly 10% have attended all the editions of the festival, while four out of ten had attended the festival three times or more. These numbers suggest a strong loyalty to the festival. However, 76.2% visited the destination for the sole purpose of attending the festival. The overwhelming majority of international visitors (90%) participated at the festival for two (2) days, indicating a strong desire and passion for the festival.

The distribution of source markets reveals essential changes compared to previous years. The festival attracted most of its attendees from Other Caribbean, specially from Surinam (29.3%), the Netherlands (21%), Colombia (12.1%), the United States (9.7%), followed by Venezuela (5.1%), and Brazil (2%)[5]. While the source countries have remained loyal, there has been a shift regarding attendees' distribution.

The preferred place of stay was hotels (52.4%), followed by family & friends (26.2%), and rented houses (12.4%). The demographic profile shows more than half of respondents were Generation X (59%), more than half had income exceeding US\$50K, while more than half was married. Another critical segment attending the festival was the single-segment, which remained a prominent and influential emerging market. Nearly 60% of the respondents participated at the festival before revealing strong loyalty, and 76% attended the festival for two days. The latter implies that the destination is also benefiting from increased loyalty.



69%



Had visited
Curaçao before

63%



Had attended the
Festival before

10%



Attended the
Festival 1 day

90%

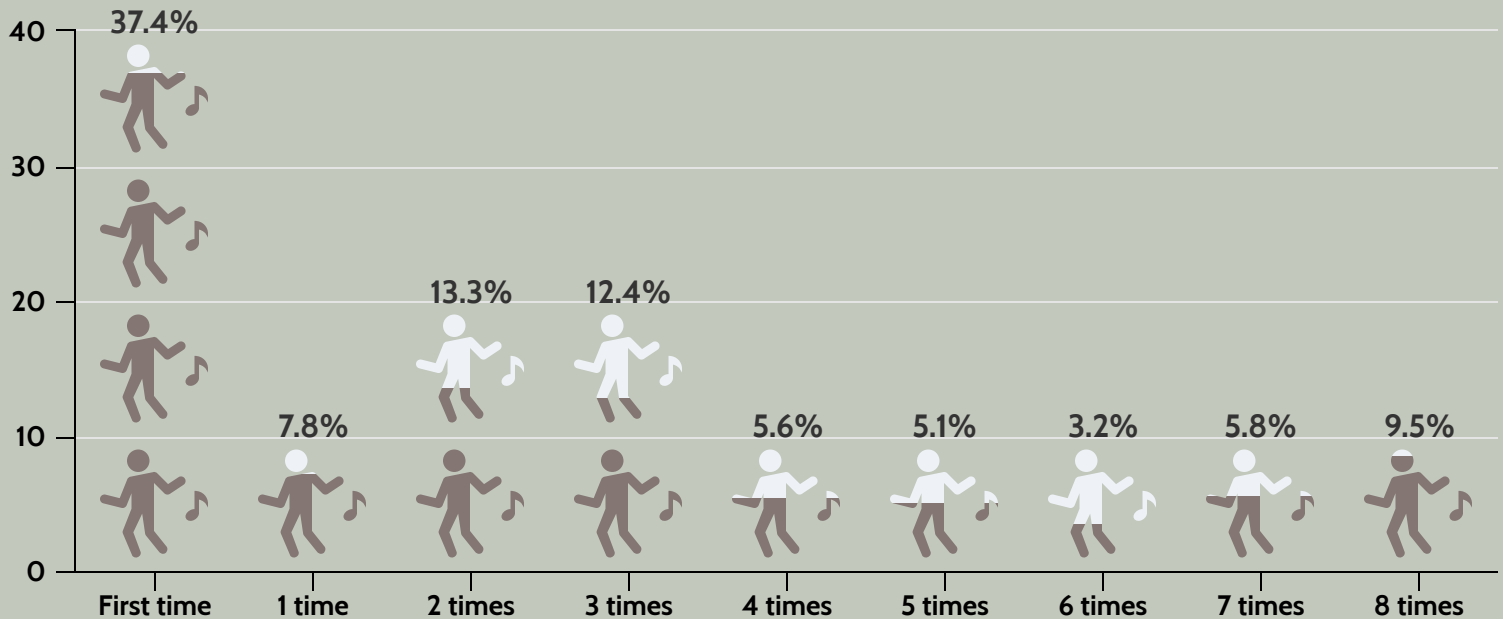


Attended the
Festival 2 days



2019 Attendees' Profile

Previous attendance to the CNSJF



69%



Visited Punda

58%



Visited Otrabanda

39%



Visited Pietermaai

46%



Visited Jan Thiel

11%



Visited Aloe
Plantation

12%



Visited National
Parks

24%



Visited Sharloo

59%

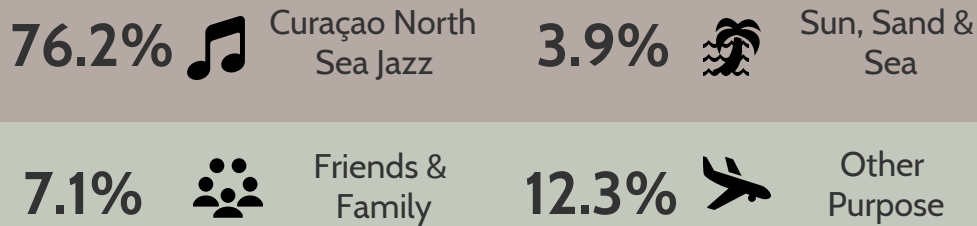


Visited Mambo
Boulevard

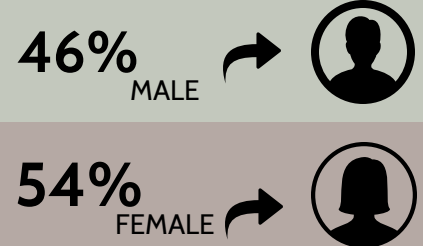


2019 Attendees' Profile

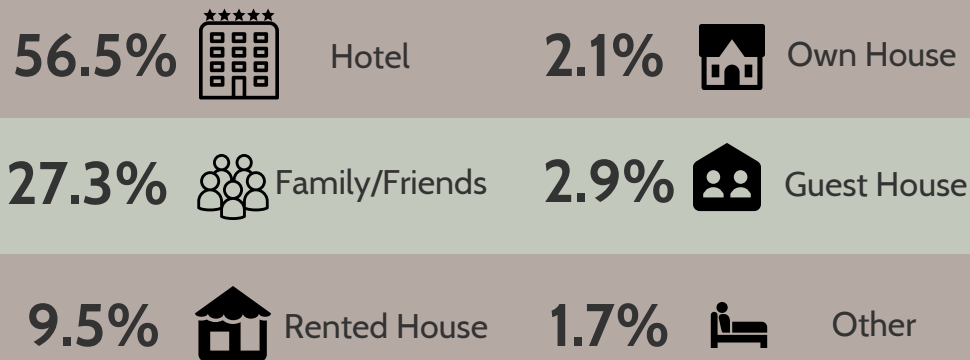
Purpose of visit



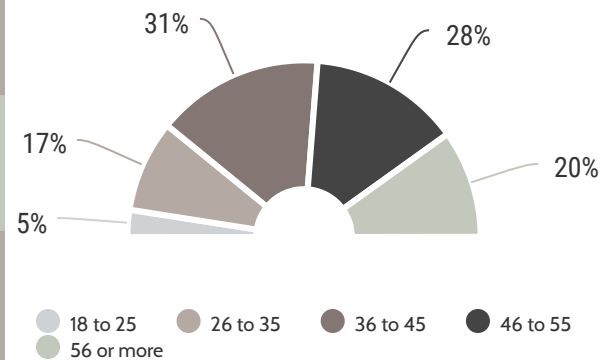
Gender



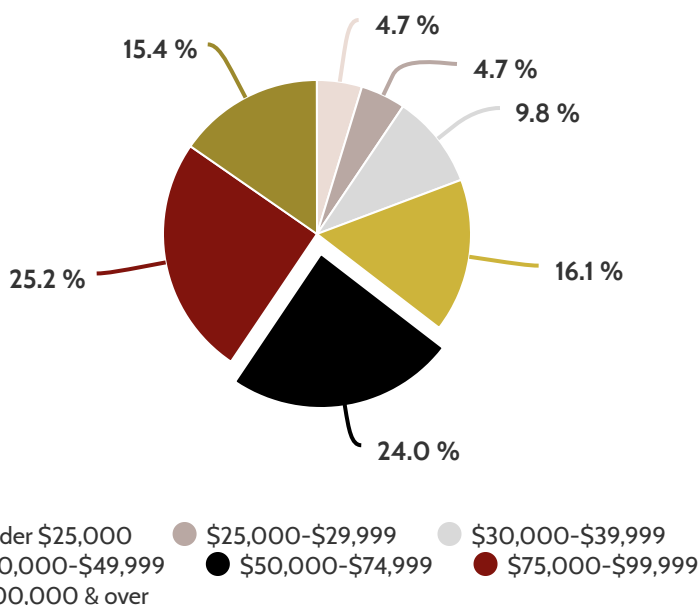
Place of Stay



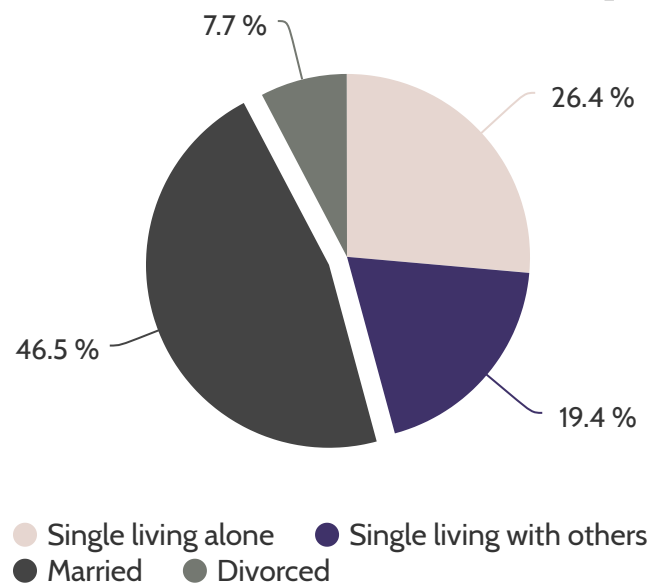
Age



Household Income



Relationship





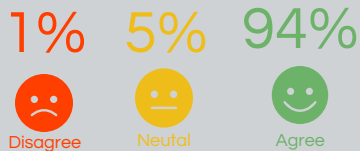
Behavioral Intentions

Intention to return or recommend the festival are indicators of a strong appeal of an event or destination. Festival attendees may return to the festival the following year and may have a significant influence in encouraging others to attend the festival when they share their experience with them. Measuring a recommendation or intention to return to the festival is a powerful way of gauging a festival's appeal and success.

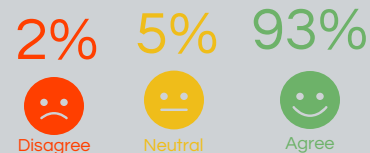
The CNSJF has consistently revealed a substantial impact on the behavioral intention of respondents. The retention perspectives are healthy, with 96% of respondents reporting the willingness to recommend the festival, 94% consider coming back to visit the festival the next year, and 86% will share their experience with others on social media. The festival has engendered compelling word-of-mouth opportunities.

The festival also seems to propagate positive behavioral responses to the destination, with 93% would come back to the destination for vacation, and 96% would recommend the destination. These responses show how the festival has become a significant opportunity for the destination in appealing to new affluent tourists. The results are also consistent with previous years.

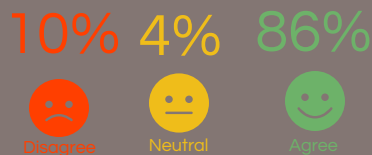
I want to come back to this festival.



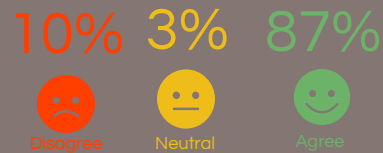
I want to come back to Curaçao for a vacation



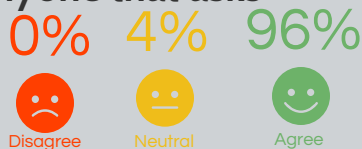
I will share my festival experiences on social media.



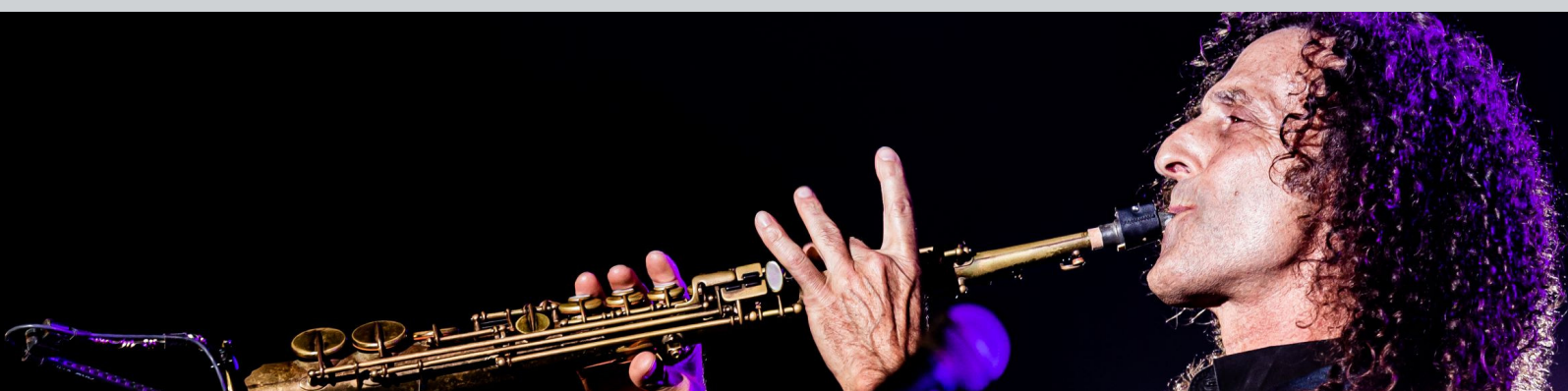
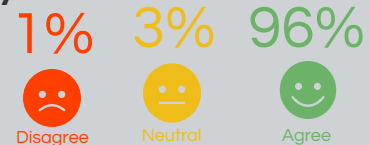
I will share my experience in Curaçao on social media



I would recommend this festival to anyone that asks



I would recommend Curaçao to anyone that asks





Identity, desire & passion towards the CNSJF

The 2018 report uncovered a strong and large fan base that the festivals have acquired over the years. This strong fan base is an outcome of the growing brand appeal of the CNSJF. However, the responses last year did not enable an in-depth understanding of the reasons the festival has accumulated this strong fan base.

The results of our study suggest that emotions towards the festival are relevant to the festival's brand and loyalty. This year's responses uncover the international attendees' intense desire to identify with the festival. More than 75% of respondents identify themselves with the festival by either thinking often about the festival or feeling a loss if not attending the festival. They like and perceive the festival as part of their identity and essential to them, which is more significant than the excellent quality imparted at the festival.

The appeal of the festival relates to the strong desire of the international attendees towards the festival. Desire is a relevant factor in determining the action of attending the festival and is connected in marketing with identity. Nearly 90% of respondents reported a strong desire to participate in the music festival, which affects the behavioral intention of international visitors. The strong preference towards the festival for pleasure and enjoyment resonates with the identity of respondents. This sense of identity with the festival's brand commitment and loyalty, both were recommending the festival and re-attending the festival. From this perspective, the festival is a critical source of fulfilling respondents' needs.





Identity with CNSJF

Attending this music festival is something I often think about.

7.8%



Disagree

10.3%



Neutral

81.8%



Agree

I would feel a loss if I were forced to give up attending this music festival.

12.4%



Disagree

10.9%



Neutral

76.8%



Agree

I really have clear feelings about attending this music festival.

6.4%



Disagree

10.1%



Neutral

83.5%



Agree

Attending this music festival is an important part of who I am.

12.7%



Disagree

11.9%



Neutral

75.6%



Agree





Desire towards the CNSJF

My desire to attend this music festival can best be expressed as strong.

4.9%



Disagree

10.5%



Neutral

84.6%



Agree

I like attending this music festival.

2.7%



Disagree

8%



Neutral

89.3%



Agree

I feel an urge or need to attend this music festival.

10.3%



Disagree

13.4%



Neutral

76.3%



Agree

My overall wish to attend this music festival can be summarized as very strong.

5.5%



Disagree

13.4%



Neutral

81.1%



Agree





Passion towards the CNSJF

Attending this music festival allows me to have a variety of experiences.

1.4%



Disagree

7.3%



Neutral

91.2%



Agree

Attending this music festival allows me to appreciate festivals even more.

2.5%



Disagree

8.8%



Neutral

88.7%



Agree

Attending this music festival allows me to have memorable experiences.

0.9%



Disagree

6.4%



Neutral

92.7%



Agree

Attending this music festival is in harmony with the other activities in my life.

3.1%



Disagree

9.3%



Neutral

87.5%



Agree





Festival Satisfaction

Satisfaction is a critical driver of choice (destination or event), spending, and intention to revisit or spread positive word of mouth (behavioral intentions). Satisfaction is a post-consumption assessment of the festival that meets or exceeds expectations. The satisfaction scores by respondents are all 90% and above, similar to the previous year. Respondents were satisfied with the musical quality of performers (93%), the performers' line-up (94%), and were overwhelmingly (94%) satisfied with the festival. These are impressive satisfaction scores for a music festival.

I am satisfied with the musical quality of the artists.

92.9%



1.4%



Disagree

5.6%



Neutral

Agree

I am satisfied with the number of artists.

93.6%



1.7%



Disagree

4.6%



Neutral

Agree

I am satisfied with the artist selection.

92.4%



2.2%



Disagree

5.4%



Neutral

Agree

Overall, I am satisfied with the festival.

93.6%



1.5%



Disagree

4.9%



Neutral

Agree





Curaçao Experience

When it comes to a vacation, Curaçao will be my first preference.

10%



Disagree

16.2%



Neutral

73.8%



Agree

I will have wonderful memories about Curaçao.

2.5%



Disagree

8.8%



Neutral

88.7%



Agree

I will remember many positive things about Curaçao.

0.9%



Disagree

6.4%



Neutral

92.7%



Agree

I am thrilled about my experience in Curaçao.

3.1%



Disagree

9.3%



Neutral

87.5%



Agree

The festival proffers the opportunity to consider the destination as a future vacation option. We have noticed over the years that the festival has become an essential source of this opportunity for vacationing. Over 90% of the respondents reported a positive destination experience. However, only 73% of respondents stated that the destination would be their first vacation choice in the future. This result implies that Curaçao requires effort in the continued development of destination brand loyalty. This effort will require planning, time, and work.





Tourists' Spending

Visitor's spending was estimated at US\$2,522 per trip per person and US\$413 per day per person. Spending per person was 20.4% more compared to spending at the 2018 festival when spending per day per person was US\$343, and 33% more than 2015 (US\$311). Visitors' spending attending the festival remains higher than the typical tourists visiting Curaçao. This spending per person per day is more than twice as high as the regular tourist spending per day (US\$171.00). Hotels received the most spending per trip per person (US\$575), followed by shopping (US\$263), food and beverage (US\$223), car rental (US\$211), and casino (153). Nightlife also showed strong spending per trip per person estimated at US\$167. The festival's tickets sales were US\$390 per person during the three-night event.

The total direct economic impact spawned by the 2019 CNSJF was estimated at US\$11,005,669. This spending was US\$3 million more than in 2018. The indirect impact which measures the business transaction spawned by the direct spending of international visitors was US\$6,115,430. The total economic impact includes the leakage factor estimated at 30.8%. The total economic contribution of the CNSJF to the island economy in 2019 was US\$17,121,099 million, with a multiplier impact of 1.54.

 At Hotel \$575 Per trip/Person	 F&B (Rest.) \$223 Per trip/Person	 Nightlife \$167 Per trip/Person	 Tours Attractions \$139 Per trip/Person
 Car & Gas \$211 Per trip/Person	 Festival Tickets \$390 3 night event	 Shopping \$263 Per trip/Person	 Groceries \$128 Per trip/Person
 Casino \$153 Per trip/Person	 Taxi \$70 Per trip/Person		 Other \$200 Per trip/Person

*All figures are in US\$.

Spending Per Tourist

\$2,522

*All figures are in US\$.

Spending Per Day

\$413

*All figures are in US\$.



Conclusion



Respondents expressed a high level of satisfaction and emotional connectedness with the festival. Satisfaction and connectedness suggest that respondents value how the festival responds to their needs. International attendees seem to suggest that their loyalty towards the festival is because they know what to expect and because they receive consistent, predictable, positive experiences. Our research over the years indicates that overall attendees' satisfaction scores exceeded 90%, where attendees expressed their satisfaction with the musical quality of performers and the performers' line-up. These are impressive satisfaction scores for a music festival.

The CNSJF continues to be a strong draw for the destination, according to respondents. More than 5,000 international attendees visited the destination and enjoyed the three-night festival. They came from multiple countries, and the distribution of source markets reveals a shift towards regional markets. The festival also attracted for the first time in its history more international visitors compared to local residents.

The positive experience evoked by the festival's emotional connectedness with the international attendees generated an estimated value of US\$11 million to the economy. This spending of the international festival attendees is astounding with spending per day that surpassed all previous CNSJF editions. The spending power per person per day at the festival is more than twice as high as the average tourist spending per day (US\$171.00). The festival by itself generated two days of the economic output for the island.

The festival also reveals substantial promotional value for the destination. Reporters from Aruba, Canada, Colombia, Germany, the Netherlands, Sint Maarten, and Surinam covered the 2019 CNSJF. Almost 22 million potential households in Latin America were exposed to the festival on their television screens.

The festival enjoys a strong perception of quality and satisfaction revealed in meaningful and memorable experiences for attendees with strong behavioral intentions to recommend and re-attend the festival. This behavioral response seems connected to the active brand commitment and loyalty towards the festival. These loyal attendees are excited and emotionally attached to the brand. The festival has become a rite of passage for these international visitors because this festival experience is about the atmosphere, about the food they eat, the friends they make and the memories they create.

The festival continues to draw thousands of international visitors to Curaçao, providing substantial business opportunities to the island.



Rosen College of Hospitality Management

UNIVERSITY OF CENTRAL FLORIDA

Dick Pope Sr. Institute *for* Tourism Studies (DPI) <https://hospitality.ucf.edu/>

In 1979 the University of Central Florida established the Dick Pope Sr. Institute for Tourism Studies (DPI). The Institute was established for the purpose of (1) conducting proprietary and public domain research, (2) promulgating information to the public at large about the contributions of the hospitality and tourism industry, especially along economic, sociological, environmental, and quality-of-life dimensions, and (3) carrying out credit and non-credit educational activities.

Since 2005, DPI has secured over \$1.2 million in contracts and grants for research purposes. Its extensive client list includes categorical sampling, destination management organizations, convention and visitor bureaus, hotels, hospitals, vacation homes, restaurants and theme parks.

Furthermore, DPI has played a significant role in facilitating over \$4 million in non-credit educational programs with international partners. UCF's Rosen College doctoral students are extraordinarily essential to the Institute's ability to meet its objectives and its commitments. In addition, contracts and grants funded through DPI have been an invaluable source of external funds to support graduate assistantships for the doctoral students.

Applied Innovative Research

The Dick Pope Sr. Institute for Tourism Studies is the intelligent choice for private and public domain hospitality research, both domestically and abroad. We have conducted research for organizations in countries such as Australia, Canada, Japan, New Zealand, South Africa and South Korea. Our client list includes destination management organizations, convention and visitor bureaus, hotels, hospitals, vacation homes, restaurants, theme parks and more.

Improving the Quality of Tourism

We are dedicated to increasing the benefits of tourism through research, public awareness and education. We invite you to visit the Dick Pope Sr. Institute for Tourism Studies digital collection to access our portfolio of research, publications, & white paper series.

A Tradition of Excellence

The Institute offers non-credit educational programs aimed at improving professionalism in the industry. It was established in 1979 after receiving \$25,000 from the Florida Public Relations Association, Orange Blossom Chapter. The name honors the late Dick Pope Sr., the former owner of Cypress Gardens and the first commercial tourist entrepreneur in Florida.

In 1983, the Institute's advisory board successfully lobbied the Florida University System's Board of Regents and created the Hospitality Management undergraduate degree program at UCF. Its successor, the Rosen College of Hospitality Management, oversees baccalaureate program activities.

Contact Our Experts

Benefit from access to more than 40 researchers in the hospitality and tourism industry. For more information, please contact Dr. Croes (407.903.8028 OR Robertico.Croes@ucf.edu)



For More Information
Please Contact:

Dr. Manuel Rivera
Manuel.Rivera@ucf.edu
Dr. Robertico Croes
Robertico.Croes@ucf.edu

University of Central Florida
Rosen College of Hospitality Management
9907 Universal Blvd.
Orlando, FL 32819

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