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DISAGGREGATING SEASONAL DEMAND OF A COASTAL RESORT

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ABSTRACT

Recent national studies document the fact that the lackluster performance in the lodging industry's occupancy rates are directly attributable to the steady growth in the supply of available rooms at a rate that consistently outpaced the demand. Resort area managers who are facing this decade-long reduction in occupancy rates are especially cognizant of the need to revise current market strategies to shield their properties from additional economic fallout that are often triggered by external events. One purpose of the Hilton Head Island Study to determine if a chase demand strategy, where resort capacities are varied with changes in the level of demand, was the proper strategy for the Hilton Head Island destination resort area. Results indicated that visitors utilized timeshare, campgrounds and rental properties more often during the winter season because of their longer average stay. This study also documented the fact that winter season visitors differed significantly from peak season visitors with respect to the level of importance they placed upon many of the hospitality and travel-related amenities in the area. The Hilton Head Island resort should take a chase demand strategy as the basic strategic marketing approach for the winter-season development.

INTRODUCTION

The past decade forced service managers in resort destination areas to be especially cognizant that the lodging industry's recent lackluster performance was directly attributable to the steady growth in the supply of available rooms at a rate that consistently outpaced the demand (17, 12). While supply has been growing at about 3.5 percent annually from 1980 to 1988, demand has grown only about 2 percent each year. According to reports by two New York accounting firms, Dun & Bradstreet and Coopers & Lybrand, the occupancy rate dilemma is further compounded by other allied financial problems. For example Coopers & Lybrand regional executive, Bob Paterson, cites the fact that as the "hotel room inventory becomes newer and, consequently, the average investment per room grows higher, hoteliers really need a room rate exceeding the rate of inflation in order to keep pace." (15).

Marketing and sales departments in the lodging industry find it difficult to combat the multiple effects that accompany the steadily increasing supply of rooms. Yet, resort managers do command a wealth of information generated by visitors to each individual resort settings that could help avoid financial problems in troubled times. The in-depth analysis of a property's demand cycle for one or more of the population segments that often remain buried within a seemingly random use pattern (9).

It is essential for the hotel manager to unlock the reasons behind the 'seemingly random' fluctuations in demand, since all resort hotels fall into the category of a capacity-constrained organization. Many resort properties' stated goal as a capacity-restrained service is to operate at a high level of occupancy year-round. However, occupancy rates, alone, tell us little of the relative profitability of the business, since high occupancy rates may be achieved by heavy discounting of room rates (9). If, in financially difficult times, the hotel finds it must cut rates to remain competitive, then the property must either operate more efficiently or entice additional travelers at an uncompetitive rate to obtain the same relative profit.

A common method for creating a more efficient service organization is to develop a flowchart analysis of the complex social process that creates and delivers the hospitality service. This flowchart approach to management helps determine what potential bottlenecks can occur in the front-of-the-house and back-of-the-house operations as a result of certain market segment's particular demands on the resort. It is the guest histories and destination area surveys that supply much of the necessary information for predicting the social patterns and the various market segment's determinant demands.

Disaggregation of the overall demand at a resort in order to discover predictable cycles in the resort business is relatively simple because each customer transaction is recorded separately. Furthermore, the individual's consumer information, or patterns of consumption, may be amplified and/or substantiated through the use of survey research. In addition, many hospitality consumers are known by their identity which allows the service to be categorized by the type of user, (i.e. business

vs. pleasure traveler). Relative pricing by season and user type also yield information that is useful in assessing proper marketing strategies.

Historically, marketing strategies based on the economic relationship of seasonality and occupancy rates were addressed by examining the utility of pricing as a method to control, project and estimate visitation (7, 13). However, pricing only proved to be effective as a management tool if the manager had some notion of how the public responded to any fluctuation in room price during any set period of time. The marketers ability to determine the nature of all the possible demand cycles and curves is further complicated by the fact that each set time period usually involves a variety of market segments (9).

Other attempts to monitor fluctuating demand cycles employed market segmentation analyses, such as sociodemographic, geographic and behavioralistic approaches, that were designed to identify specific consumer wants and needs (18, 8). Unfortunately, the utility of each of the described segmentation methods, when used separately, was suspect because these analyses often produced contradictory results. For example, segmentation studies that rely solely on sociodemographic information were useful in documenting trends (16) but paid little attention to changing consumer tastes, needs, images and preferences for particular travel-related services. Several other research studies documented the fact that demographic segmentation alone does not discriminate adequately between market segments (1, 3, 5, 10).

Geographic segmentation, when combined with other test criterion such as sociodemographics and psychographics, proved to have some utility when used to define predictable use cycles. Etzel and Woodside (6) found significant differences between distant and near-home travelers with respect to benefits sought and media influence. Studies involving ski resort visitor markets have successfully combined geographic and behavioral techniques in order to identify markets using variables such as visitor spending behavior (11), and level of skill (2).

Seasonality was examined, in an earlier state-wide study, as a market segmentation technique that combined variables including benefits sought, psychographics and geographic location (4). In another regional study, statistically significant differences were found to exist between tourists at a southeastern U.S. resort who appeared to seek different benefits based on the season of the year and the visitors' geographic point of origin (1). This study also suggested that resort managers must recognize the influence of seasonal variations on various market segments' needs and incorporate this recognition in annual plans.

THE STUDY

Winter occupancy rates at Hilton Head Island (approximately 30%) fall well below the optimum capacity. It is the purpose of this study to determine if there is one or more regional demand cycle present within the winter season population that would prove useful in developing an off-season marketing strategy. This paper's working hypothesis states

that the typical winter visitor to Hilton Head Island presents a distinctly different profile than the normal high and shoulder season visitor to the island. It is unlikely that any future winter marketing strategies will meet with success unless it is based on an adequate understanding of past winter visitors who chose Hilton Head Island as a winter-time vacation destination.

Identification of the various activities and benefits-sought by the winter season visitor is one of the first research steps to be taken by marketing managers at Hilton Head Island. This resultant information from such formal research can be utilized by resort managers to determine the basic marketing strategy. Two basic strategy alternatives are available to each resort manager. "The first is a strategy of level capacity in which the same amount of capacity continues to be offered, regardless of variations in demand. The second is a chase-demand strategy under which the amount of capacity is varied in response to changes in the level of demand" (9).

METHODOLOGY

During 1988 a study was initiated through the Hilton Head Island, South Carolina, Chamber of Commerce in an effort to acquire a better understanding of the phenomenon surrounding seasonal characteristics of visitors to Hilton Head Island, South Carolina. Attributes of resort amenities thought to be important factors in the decision to visit Hilton Head Island were the primary focus of the study. The survey returns provided information on the individual travelers' reported ranking of importance of selected activities and levels of satisfaction with those activities. Individuals also reported the degree of economic impact and certain demographic characteristics. The surveyed activities, economic information, and demographic characteristics listed above were identified by local tourism leaders as important components for the development of future marketing strategies.

Questionnaire Development

In order to gather information relative to the study objectives, a four page questionnaire was developed in conjunction with the Board of Directors for the Hilton Head Island Chamber of Commerce. During the Fall of 1987, a pre-test on a random sample of visitors departing Hilton Head Island was conducted at highway and airport locations. Prior to the pre-test, a methodology was specifically implemented to determine sample site concerns. During ten randomly selected dates, individuals were used as highway counters to record actual numbers of commercial, residential/employee, and visitor vehicular counts. Vehicles departing the island during the hours of 9 a.m. to 4 p.m. were counted and categorized into these groups. Vehicles with out-of-state license plates were identified and recorded also. This information was then utilized to determine the relative weighting of highway and airport respondents. Similarly, individuals departing via air were counted according to party size and trip purpose on randomly selected dates.

A total of 419 usable responses were obtained during a five day period between 9 a.m. and 4 p.m. The pre-test resulted in the rewording of several survey questions.

Sampling Techniques

A random day/site/time sampling frame was employed for the main study. During each quarter, departing visitors were randomly screened and sampled at highway and airport locations. A total of ten computer-generated highway sampling dates and times along with ten airport sampling dates and times were established each quarter for data collection purposes.

A total of 4,000 visitor surveys were randomly distributed to visitors departing Hilton Head Island from December 1, 1987 through November 30, 1988. Highway and airport locations were utilized for survey purposes. At highway locations randomly selected visitors were given one questionnaire per vehicle along with a self-addressed return envelope. Highway visitors were surveyed at the last traffic light prior to departing Hilton Head Island. The traffic light was set on a randomly calibrated timer by the South Carolina Department of Transportation. A total of 32 percent of those visitors sampled at highway locations responded to the survey.

Most of those sampled visitors departing by airplane from the Hilton Head Island airport completed surveys while waiting for their scheduled departure. Thus, the airport sample resulted in a higher rate of usable response (96 percent, N=699). Overall, 1759 usable surveys were received from both locations. This equaled a 44 percent rate of response. Table 1 identifies the survey sampling results by location and season. Potential respondents were screened by trained interviewers to avoid the distribution of questionnaires to island residents and employees.

THE RESULTS

Winter Season Profile Analysis

Seasonal categories were developed consistent with the method used by the State of South Carolina's Department of Tourism for its annual reporting system. Peak season was defined as Summer (June 1-August 31). Shoulder seasons included Spring (March 1-May 31), Fall (September 1-November 30) and Winter (December 1-February 28).

A descriptive analysis of the study revealed that the majority of Hilton Head Island's winter visitors completed at least some college course work (73.3%), and more than forty-three percent of all persons had an annual family income equal to or greater than \$60,000. Notice in Table 2 that winter visitors annual income seemed to be slightly smaller than the summer and shoulder seasons.

Table 3 presents the frequency distribution of primary reason for the trip characteristics categorized by season: study results indicated that pleasure travel was the primary reason (50.0%) for winter travelers to visit Hilton Head Island, followed by attendance at conventions and meetings (17.2%) throughout the majority of the seasons. The majority (60.1%) of the respondents traveled with a family group. Family groups seem to prefer the winter and summer months, while the shoulder seasons attracted a higher percentage of respondents traveling with friends (Table 4).

When examining seasonal differences by trip purpose, the pleasure/vacation category was cited as the predominant reason for visitation during all seasons of the year (Table 3). However, winter season visitors differed significantly in many areas when compared with visitors during peak and shoulder (summer, spring and fall) seasons. For instance, winter visitors were less interested in beach activities and more likely to fish. Other seasonal characteristics included the heightened interest in the ability to observe wildlife and to drive for pleasure. These characteristic behaviors could be the result of lack of heavy underbrush that blocks views of birds, animals and scenic vistas in all other seasons. Further analysis of the winter season visitors' profile revealed that these people were the least likely to be first-time visitors (20.6 percent) to the Hilton Head area when compared with first time visitors during any other season (Table 5). Winter visitors represented a heavier repeat travel market with 42.4 percent responding visitors indicating they had been to the area four times or more. Comparatively, 22 percent of those spring respondents indicated visiting the area four times or more (Table 5).

One of the study objectives was to identify patterns in accommodation usage by seasonal visitors to Hilton Head Island. Results indicated that visitors utilized timeshare, campgrounds and rental properties more often during the winter season because of their longer average stay (Table 6). Median travel expenditures per visit tended to be smaller during the winter season because of the larger percentage of room nights spent at campgrounds, timeshares and rental properties (Table 7).

Analysis Of The Winter Demand Cycles By Region

The identification of information concerning the possibility of winter season visitors responding to demand cycles that were substantially different from the other seasons was a major focus of this paper. Visitors from all seasons ranked the opportunity to relax, enjoy the beaches and dine out as the most important attributes in deciding to visit Hilton Head Island. At the same time the study noted that golf, tennis and (night-life) entertainment were relatively unimportant to the resort visitor (Table 8).

This study documented the fact that winter season visitors differed significantly from peak season visitors with respect to the level of importance they placed upon many of the travel-related amenities in the area. For example, winter visitors identified significant sources of benefits that Hilton Head Island offered to retirees, real-estate

investors, fishermen, or amateur naturalists (Table 9). However, a preliminary descriptive analysis such as the one provided by the information in Table 9 lacks the ability to provide a solid basis for developing a meaningful marketing strategy. As a counterpoint, this study suggests that a breakdown of the criterion variables, such as real estate interests, by season and region might yield information not readily apparent to the casual observer.

To illustrate this point a breakdown analysis was performed. The breakdown procedure was utilized here as a convenient way to arrange means of one variable for each of the categories of one or more variables. First, a breakdown of the criterion variable, "importance of real estate interests", was broken down by season and region of the country. This study documents seemingly identifiable seasonal trends in the reported importance of the criterion variable "importance of real estate" (Table 10). Except for the Carolina region, all other regions listed winter rated the importance of real estate interests highest in the winter season. Certainly the lack of differences in the reported means from the cited regions reflect that this expectation of a benefit represents a social pattern that differentiates the winter season personality. Table 10 also seems to indicate the winter visitors from the Southeast, Midwest and Far West regions were more interested in real estate than their contemporaries who came during other seasons.

Another regional analysis of Hilton Head's attributes seems to point out, in a statistically significant manner, that New England and Mid-Atlantic visitors (Region 1, Table 11) rank the level of importance of retirement interests, conferences and night-life entertainment in a different manner from most all of the other regions. For instance visitors from the northeastern states were less concerned about night-life and more interested in the possibility of retiring at Hilton Head than most of the other regions.

CONCLUSIONS

Historically, attempts at understanding fluctuating visitor patterns repeatedly focused on issues involving pricing, psychographics, benefits sought, geographic variables, travel motives and party size. Only a limited body of research addressed seasonality combined with regional analysis as a separate issue in understanding visitor patterns. This study supports the hypothesis that significant differences exist among winter visitors to coastal resorts when segmented according to region. Many significant differences between visitors segmented by their regional origin were identified in this study. Length of stay according to accommodation type used, attributes important in the decision to visit this coastal resort destination and the visitors trip origin comprised the characteristics found to be particularly useful in formulating a distinct winter visitor profile.

Although the overall study mentioned other significant differences utilizing seasonality as a dependent variable, the purpose of this article was to document if Hilton Head Island should seriously follow a chase demand strategy for the winter season visitors. Based upon the

initial information presented in this article, it does seem that the chase demand strategy would be the appropriate general marketing approach. The winter visitors would require change in such resort management elements as leisure activities programming, scheduling of maintenance downtime, use of part-time employees, cross-training of employees, pricing and alternative communication efforts in order to help smooth the differences in demand between the winter season and all other seasons.

In a tourist dependent area such as Hilton Head Island, South Carolina, the importance of attracting visitors during the winter season is vital to the success of local tourism related facilities. Therefore, information regarding a specific target market could prove to be very useful to Hilton Head Island marketers. Recently, Hilton Head Island lodging properties reported average winter occupancy figures consistently below the 30 percent level (14). Performance at this level is unacceptable in todays competitive environment given that current industry trends suggest an oversupply of lodging properties. These properties should be intrigued by the prospect of understanding the specific needs sought by winter visitors to Hilton Head Island. For example, Table 11 suggests that the winter visitors from New England and the Mid Atlantic States come to Hilton Head Island, in part, to seek benefits they attach to retirement interests. Similarly, other combinations of psychographic and demographic variables, when analyzed with respect to the season, may outline the basis for a successful winter season marketing in other regions.

Today's increasingly value conscious and educated traveler requires accurate, in-depth information about potential and actual visitors. An increased understanding of seasonal differences among visitors has emerged from this study. The importance placed upon resort attributes in deciding whether or not to visit a resort area has been found to be paramount for future marketing efforts involving destination resort visitors.

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Table 1
Hilton Head Island Survey Results by Season

Number of Surveys Distributed					
	WINTER	SPRING	SUMMER	FALL	OVERALL
Highway	716	768	1011	775	3270
Airport	96	222	207	205	730
Total	812	990	1218	980	4000

Number of Surveys Returned					
	WINTER	SPRING	SUMMER	FALL	OVERALL
Highway	256	245	332	227	1060
Airport	84	203	207	205	699
Total	340	448	539	432	1759

Overall Percent Returned					
	WINTER	SPRING	SUMMER	FALL	OVERALL
Highway	36%	31%	33%	29%	32%
Airport	88%	91%	100%	100%	96%
Total	42%	45%	44%	44%	44%

Table 2
Sociodemographic Characteristics Breakdown by Season

SOCIODEMOGRAPHIC CHARACTERISTIC	Percent of total by season			
	Winter	Spring	Summer	Fall
EDUCATION				
High School Diploma or Less	14.5%	8.1%	8.5%	11.8%
College degree or some college	50.8%	55.4%	46.3%	53.0%
Graduate degree or some grad school	34.7%	36.4%	45.2%	35.2%
Chi square=5.45; p=0.48				
GROSS FAMILY INCOME				
Less than \$30,000	13.7%	11.6%	8.7%	8.0%
\$30,000 to \$59,999	42.8%	32.2%	34.9%	29.5%
\$60,000 to \$99,999	26.0%	32.5%	31.3%	37.2%
Greater than \$100,000	17.5%	23.7%	24.8%	25.3%
Chi square=8.86; p=0.44				

Table 3
Primary Purpose of Hilton Head Island Trip

CATEGORY	WINTER (n=340)	SPRING (n=448)	SUMMER (n=639)	FALL (n=432)	OVERALL (n=1759)
Pleasure or vacation	50.0*	74.9	63.0	50.6	59.6
Attend meetings or conventions	16.0	7.4	16.8	14.1	13.6
Business	10.5	5.0	3.4	7.9	6.7
Visit friends & relatives	8.0	10.1	4.4	8.1	7.7
Retirement	7.0	0.2	0.2	1.0	2.1
Real estate	5.5	0.8	0.2	3.8	2.6
Personal	1.4	0.6	0.6	0.9	0.9
Other	1.2	0.8	10.6	11.8	6.1
No response	0.4	0.1	0.6	1.7	0.7

* All figures represent % of total

Table 4
Travel Group Type by Season

CATEGORY	WINTER (n=316)	SPRING (n=459)	SUMMER (n=486)	FALL (n=418)	OVERALL (n=1679)
ALONE	17.4	13.7	10.9	13.6	13.6
FAMILY	60.1	53.6	66.0	48.3	57.1
FRIENDS	10.4	20.9	8.6	18.2	14.7
BUSINESS	9.8	11.1	9.3	16.3	11.6
OTHER	2.2	0.7	5.1	3.6	3.0

All figures represent % of total

Note: Chi Square=72.13; df=12; p=0.00

Table 5
Number of Previous Visits to Hilton Head Island

PREVIOUS VISITS	WINTER	SPRING	SUMMER	FALL	OVERALL
First Visit	20.6	46.3	32.7	26.4	31.5
1 Previous Visit	14.8	17.0	12.1	12.1	14.0
2 Previous Visits	8.6	4.0	8.9	8.4	7.5
3 Previous Visits	9.1	10.5	6.1	5.1	7.7
4-5 Previous Visits	9.7	3.7	8.8	8.6	7.8
6 or More Visits	32.7	18.4	25.1	21.8	24.5
No Response	4.6	0.0	6/3	17.4	7.1

Table 6
Chi-Square Analysis of Relationships to Accomodation Types
Used by Season at Hilton Head Island in 1988

ACCOMODATION TYPE	WINTER	SPRING	SUMMER	FALL
TIMESHARE	20.7	8.03	10.4	18.2
RENTAL PROPERTY	13.5	14.2	20.7	15.0
CONDOMINIUM	12.8	18.1	11.2	7.4
FRIENDS/RELATIVES	13.5	26.9	9.1	14.5
HOTEL/MOTEL/INN	35.5	25.5	43.4	43.7
CAMPGROUND/R.V.	3.9	7.8	5.1	1.2

Chi square = 37.24 P = .00016 df = 15

Table represents columns percentages

TABLE 7
A Seasonal Comparison of Expenditures

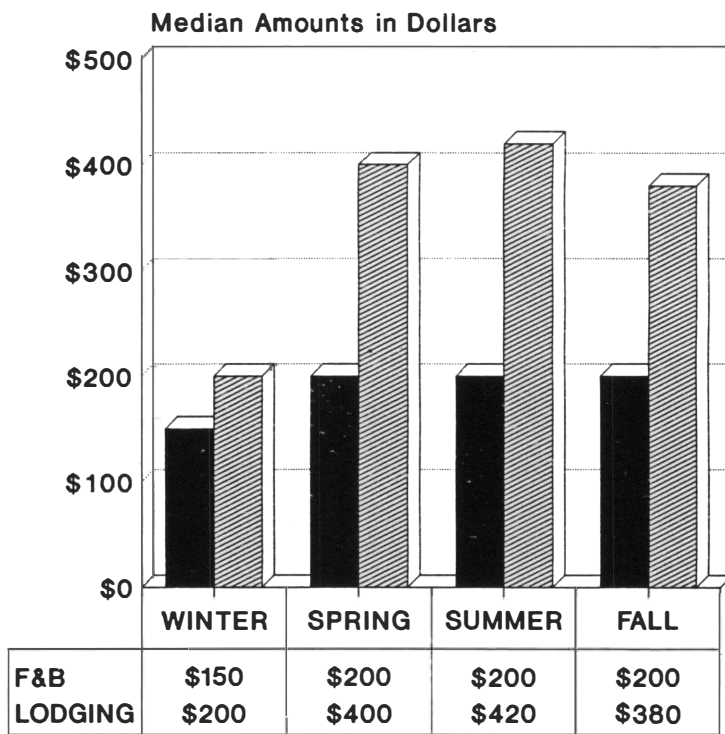


Table 8
Overall Ranking of Winter Season Attributes

<u>Rank</u>	<u>Attributes</u>	<u>Mean</u>
1	Rest	4.27
2	Beaches	3.97
3	Dining Out	3.67
4	Sightseeing	3.25
5	Golf	2.96
6	Shopping	2.90
7	Entertainment	2.65
8	Tennis	2.33
9	Sport Events	2.30
10	Real Estate	2.26
11	Retirements	2.24
12	Conferences	2.22
13	Fishing	2.17
14	Boating	1.16

Table 9
Significant Differences in Attribute Importance by Season*

ATTRIBUTE	WINTER	FALL	SPRING	SUMMER	Overall Mean	F-Test Value	> F
BEACHES	<u>2.03</u>	<u>1.88</u>	<u>1.79*</u>	<u>1.62</u>	1.81	9.39	0.000
GOLF	<u>3.04</u>	<u>3.27</u>	<u>2.91</u>	<u>3.34</u>	3.15	5.67	0.000
FISHING	<u>3.82</u>	<u>4.04</u>	<u>4.14</u>	<u>4.07</u>	4.03	3.19	0.023
RETIREMENT INTERESTS	<u>3.76</u>	<u>4.17</u>	<u>4.23</u>	<u>4.33</u>	4.15	11.03	0.000
REAL ESTATE INTERESTS	<u>3.73</u>	<u>4.03</u>	<u>3.96</u>	<u>4.04</u>	3.46	3.24	0.021
SPORTING EVENTS	<u>3.70</u>	<u>3.67</u>	<u>3.54</u>	<u>3.83</u>	3.69	2.46	0.061
PLEASURE DRIVING	<u>2.74</u>	<u>2.96</u>	<u>3.06</u>	<u>3.18</u>	3.00	6.34	0.000
OBSERVING WILDLIFE	<u>2.42</u>	<u>3.29</u>	<u>3.36</u>	<u>3.13</u>	3.02	3.71	0.003

* Duncan's Multiple Range A Posteriori Test was used for identifying significant differences.

** Seasonal means that are not significantly different are joined with an underline. Breaks Please note that the Golf attribute is an exception to the rule. In this case, Fall and Summer seasonal means were significantly different from the Winter and Spring seasonal means. Also note that all means from a scale where (1= Most Important and 5= Least Important).

Table 10
Importance of Real Estate
Broken Down by Region and Season

REGION/SEASON	MEAN	REGION/SEASON	MEAN
NEW ENGLAND & M.A.	2.05	THE SOUTHEAST	1.98
Fall	2.39	Fall	1.83
Winter	<u>2.31</u>	Winter	<u>2.30</u>
Spring	2.25	Spring	2.03
Summer	2.01	Summer	1.89
WASHINGTON, DC	2.28	THE MIDWEST	2.00
Fall	2.33	Fall	1.76
Winter	<u>2.41</u>	Winter	<u>2.45</u>
Spring	2.07	Spring	1.93
Summer	2.36	Summer	2.05
THE CAROLINAS	1.99	FAR WEST	1.75
Fall	2.08	Fall	1.50
Winter	<u>1.88</u>	Winter	<u>2.36</u>
Spring	2.07	Spring	1.54
Summer	1.97	Summer	1.74
N.E. & M.A. = MA, NH, VT, MN, CN		S. E. = GA, AL, TN, MS, KY, LA	
M. A. = PA, DE, NY, NJ		M. W. = OH, IN, MI, IA, IL	
DC = DC, MD, VA, WVA		F. W. = The remainder of the states	
CAROLINAS = NC, SC			

Note = Differences between regions was significant
at the 0.010 level

Table 11
Significant Differences in Winter Season Attributes
by Region

ATTRIBUTE	Region 1	Region 2	Region 3	Region 4	Region 5	Region 6 ***	Prob. > F
RETIREMENT	<u>2.84*</u>	<u>1.87</u>	<u>1.89</u>	<u>1.97</u>	<u>2.22</u>	<u>2.19</u>	0.0038 **
CONFERENCE	<u>1.30</u>	<u>2.90</u>	<u>2.59</u>	<u>2.49</u>	<u>2.25</u>	<u>2.31</u>	0.0001
NIGHT LIFE	<u>2.19</u>	<u>3.01</u>	<u>2.80</u>	<u>3.00</u>	<u>2.68</u>	<u>2.55</u>	0.0270

• Duncan's Multiple Range A Posteriori Test was used for identifying significant differences.

** Regional means that are not significantly different are joined with an underline.
 Breaks in the underline indicate a significant difference between regional means.

*** Region 1 NORTHEAST - MA, NH, VT, MN, CN PA, DE, NY, NJ

Region 2 D.C. AREA - D.C., MD, VA, WVA

Region 3 CAROLINAS - NC, SC

Region 4 SOUTHEAST - GA, AL, TN, MS, LA, KY

Region 5 MIDWEST - OH, IN, MI, IA, IL

Region 6 FAR WEST - The remainder of the states