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Tourism Barometer

VOLUME 1, NUMBER 2

SUMMER 1982

The four-quarter-ahead forecasts of out-of-state domestic visitor arrivals for the third quarter of 1982 through the second quarter of 1983 are presented in the graph below and also in the table on the following page. These forecasts suggest that Florida visitor arrivals for all of 1982 will be off on the order of 1½ - 2 percent. This is approximately what was forecast for all of 1982 in the previous issue of the TOURISM BAROMETER.

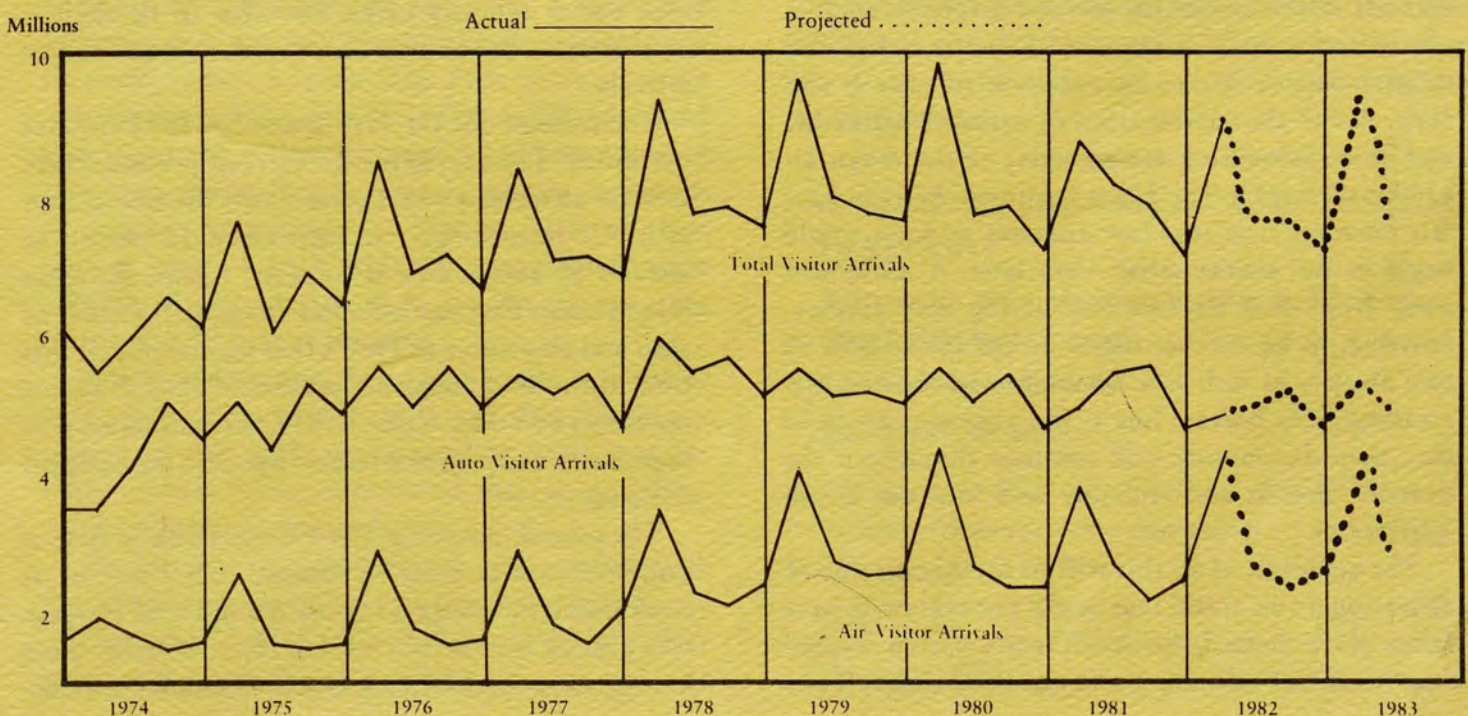
At this point in time, third quarter domestic visitor arrivals can be expected to be slightly less than forecast earlier. This small adjustment -- from -2.4 percent to -3.0 percent relative to the third quarter of 1981 -- would seem to be due to a delay in the anticipated rise of several key national economic indicators. The beginning of a national economic recovery, in other words, has been slow. This is reflected in several key economic indicators --and these, in turn, suggest slightly more of a downturn in domestic visitor

arrivals during the third quarter.

It is interesting to note that this forecasted decline in third quarter arrivals might be expected to be due entirely to a significant downturn of 8.9 percent in the number of auto visitors to Florida. Key visitor industry executives cite several factors that would support such a significant downturn in expected auto visitor arrivals. The World's Fair in Knoxville is one of these factors. Despite mixed critical reviews, attendance to date at the World's Fair has reportedly been pleasing to Knoxville authorities -- and this leads many Florida visitor industry leaders to suspect that the World's Fair will, in fact, have a depressing effect on Florida auto arrivals throughout the summer months. The recent upward movement in gasoline prices would also suggest a depressing effect on Florida auto visitor arrivals during the third quarter.

Walt Disney World's EPCOT, due to open on October 1, 1982, is also expected by some to have a

Out-of-State Visitor Arrivals



FLORIDA TOURISM FORECASTS
OUT-OF-STATE VISITOR ARRIVALS - QUARTERLY
1982-III through 1983-II
(Millions)

	1982-III	% Change from 1981-III	1982-IV	% Change from 1981-IV	1983-I	% Change from 1982-I	1983-II	% Change from 1982-II
AUTO	5.038	-8.9%	4.680	+2.4%	5.382	+12.3%	5.021	+1.0%(est.)
AIR	2.514	+11.7%	2.710	+8.6%	4.398	+3.4%	2.859	+7.3%(est.)
TOTAL	7.552	-3.0%	7.390	+4.6%	9.780	+8.1%	7.880	+3.2%(est.)

NOTE: Estimates include visitor arrivals from within the U.S. and Canada.

depressing effect on Florida's 1982 summer auto travel business. The validity of this hypothesis is perhaps questionable, given the fact that EPCOT appears to remain a well-kept secret outside of Florida. Nevertheless, there may be some who are postponing a 1982 summer visit to Florida until after the opening of EPCOT.

One other factor that is expected to have a depressing effect on third quarter auto visitor arrivals in Florida is the status of the Canadian market. The value of the Canadian dollar relative to the U.S. dollar has reached an all-time low -- making a Florida vacation even more expensive in real terms for a Canadian. To the extent, then, that Canadians represent an important source of potential third quarter auto visitors, the low value of the Canadian dollar can be expected to lower the number of Canadians traveling to Florida during this period.

Third quarter visitor arrivals by air present an entirely different picture. Three months ago, air visitor arrivals were projected to increase by 6.5 percent over the corresponding time period in 1981. The revised forecast at this time anticipates an even greater surge in air visitor arrivals -- some 11.7 percent. Industry officials believe this to be a realistic forecast at this time, due to the continuation of aggressive marketing and deep discounting among many of the major air carriers serving Florida. Many informed observers have felt for some time that low discount air fares would begin to end sooner rather than later. A movement away from deep air fare discounting now appears, however, to be another major airline bankruptcy or two away -- as well as a rebounding of the national economy. The bottom line at this time appears to be that deep discounting will continue throughout the summer months and probably well into the fourth quarter.

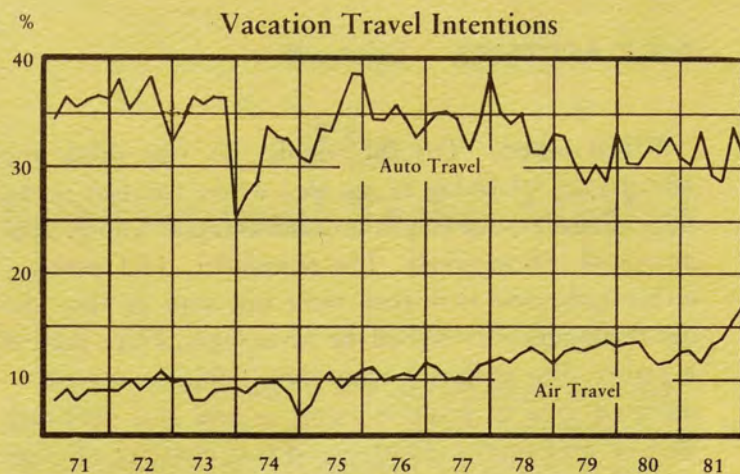
The net result of all this will be the stimulation of discretionary air travel that might not otherwise have taken place. Indeed, for small travel parties located near major air hubs, air travel can be as cheap, if not

cheaper than, automobile travel. All in all, it does not appear unreasonable to expect third quarter air arrivals to spurt on the order of 11-12 percent. This growth, however, will not be sufficient to compensate for the anticipated decrease in visitor arrivals by automobile during the third quarter.

The fourth quarter -- and particularly the December holiday season -- will, of course, present the first real test of EPCOT's ability to stimulate domestic vacation travel to Florida. The Knoxville World's Fair will have closed at the beginning of the fourth quarter and substantial publicity about EPCOT will have a chance to influence holiday vacation plans. In the previous TOURISM BAROMETER, a projection of a 2.4 percent increase in total fourth quarter domestic visitor arrivals was made. The revised forecast for the fourth quarter at this time is an increase of 4.6 percent over the fourth quarter of 1981. Most of this increase is due to a revision in anticipated air visitor arrivals. Much, of course, will depend on the status of a national economic recovery, as well as the status of deep air fare discounting. It is interesting to note here that visitor industry executives seem to be uncharacteristically anxious about fourth quarter visitor arrivals.

The forecast for the first quarter of 1983 remains optimistic. In fact, the revised forecast presented here calls for an increase of 8.1 percent over the first quarter of 1982. Interestingly, an increase of 12 percent in arrivals by automobile is forecast. Again, there are many factors that can influence the actual number of auto and air visitors in 1983's first quarter, but at this time there is widespread optimism among visitor industry executives -- due to EPCOT and to what is hoped to be an inevitable improvement in the national economy.

The second quarter of 1983 at this point in time is projected to experience an increase of 3.2 percent in total domestic visitor arrivals. Should this increase take place, it may be the first time since 1980 that there has been an actual increase in second quarter arrivals.



All in all, the four-quarter-ahead forecasts presented here parallel those presented in the previous issue of the TOURISM BAROMETER. The most significant difference, at least during the next two quarters, is in the area of domestic air visitor arrivals. Upward revisions in the number of air visitor arrivals are based on a period of sustained air fare discounting over the last year or more -- as well as the expectation that deep discounting will continue at least for the balance of 1982. □

Public Attitudes Toward Tourism

Clearly, the popularity of a vacation destination can be affected dramatically by the attitudes of an area's permanent residents. Some destination areas are well known for a great tradition of hospitality, for welcoming and treating visitors as guests. Other destination areas, from time to time, become well known, at best, for a reluctant acceptance of tourists. At worst, there is open hostility toward visitors -- and when this happens, the word spreads and tourists quickly begin to spend their vacation time and dollars elsewhere.

Permanent residents can also have a significant influence over the way in which visitors spend their time and money. A recent Dick Pope Institute survey of more than 400 households in Central Florida found that 56 percent of these households had been visited at least once, during the preceding 12 months, by friends or relatives vacationing in Florida. Half of these visitors traveled to Florida by automobile, while another 40 percent arrived by air. On average, they spent some 12 days in the state.

When asked whether their guests would have visited some place other than Florida had they not had a chance to visit with the respondent and his or her family, some 53 percent stated that their visitors would have traveled elsewhere.

The information below clearly suggests that those Floridians who are visited by vacationing friends and relatives exert considerable influence over how their guests spend their time and money.

QUESTION:

How much influence did you or your family have over . . .

	GREAT	SOME	LITTLE
Hotels where guests stayed (78% stayed with respondent)	11.5%	8.4%	2.2%
Attractions they visited (10.1% didn't visit attractions)	48.0%	26.4%	15.4%
Restaurants they patronized (11.0% didn't eat out)	50.2%	28.8%	10.6%

Respondents were also asked to identify the major advantages and disadvantages of living in an area where tourism is the major industry. Their answers are summarized below.

QUESTION:

What are the major *advantages* of living in an area where tourism is the major industry?

Economic/Employment/Income	43.6%
Amusements/Entertainment	13.0%
Social	5.4%
Recognition of the area/state or regional pride	4.9%
Environmental	1.0%
No advantages	8.1%
Other/Don't Know	24.0%

QUESTION:

What are the major *disadvantages* of living in an area where tourism is the major industry?

Traffic/People Congestion	40.2%
Higher Prices	7.1%
Environmental	6.1%
Unstable Economy	5.1%
Attitudes of Visitors	4.7%
Social	1.7%
No advantages	10.3%
Other/Don't Know	24.7%

PUBLIC ATTITUDES . . . (continued)

When asked, "On the whole, do you think the advantages (of living in an area where tourism is the major industry) outweigh the disadvantages?", 56 percent answered affirmatively. The remainder, 44.1 percent, either indicated that they were not sure or that the disadvantages outweighed the advantages. Thus, there is a rather slim majority who view living in a tourist-oriented area in positive terms -- and this probably should cause visitor industry leaders to consider whether there is a need to communicate the positive benefits of tourism to Florida's resident population. □

Consumer Attitudes and Vacation Travel Intentions

The previous edition of the TOURISM BAROMETER reported on six-months-ahead vacation travel intentions data gathered by The Conference Board. This data is collected bi-monthly and is based on responses from a national sample of consumers. Three months ago, the vacation travel intentions data supported forecasts of a probable decrease in Florida visitor arrivals by automobile and a possible increase in visitor arrivals by air through the second and third quarters of 1982. As indicated in the accompanying chart, the most recent Conference Board vacation intentions data suggest a downturn in both auto and air arrivals over the next several months (compared to year earlier visitor arrival levels). The visitor arrival forecasts presented on page 2 anticipate a decrease in auto arrivals in the months ahead, but they project an increase in arrivals by air. Vacation intentions information can, at times, be very useful in projecting actual vacation behavior. This information must be evaluated with considerable care, however -- especially in times of great economic uncertainty.

The present national economic climate is, of course, a very uncertain one. The national economy affects consumers in a variety of ways -- including, for many, their vacation planning. Overall consumer confidence is also tracked on a regular basis by The Conference Board, and it reports that only twice since 1970 has consumer confidence in the national economy been as low as it is presently. At the same time, consumer attitudes concerning economic prospects over the next six months have begun to improve. Fewer consumers

expect business conditions to worsen, and attitudes toward future employment prospects have improved. In short, consumers -- like many visitor industry executives -- expect the national economy to begin rebounding before too long, and this optimism can have a positive impact on vacation travel intentions. □



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The International Travel Market

Travel by foreigners is one of the fastest growing segments of the travel market, and the importance of the international market has been recognized for some time by Florida's visitor industry. What growth the state's leading industry experiences in the years ahead may depend to a significant extent on the growth of the international market.

Many are convinced that it is a market that needs to be carefully nurtured -- but this requires deliberate movement away from the cultural illiteracy from which most Americans suffer. There is a need to know much more about international visitors than that they speak strange languages and carry different currencies.

A recent Dick Pope Institute survey confirmed that many visitor industry businesses have not yet developed the facilities nor begun to offer the services that would make most international tourists feel more comfortable while visiting Florida. Even for Spanish-speaking visitors, the most numerous of foreign visitors to Florida, there are many hotels, restaurants, and attractions that have not yet done all that can be done to make the foreign guest feel even more at ease. This is illustrated in the accompanying table.

Available
Facilities/Services
For Spanish-speaking

Visitors	Hotels	Restaurants	Attractions
Access to interpreter	86%	36%	86%
Informational signs	55%	14%	71%
Menus		32%	
Handouts/Brochures	68%		71%
Telephone Operators	41%		
"How To Get To" Signing	41%	7%	29%
Bilingual service personnel	55%	11%	43%
Foreign currency exchange	64%		14%

In-depth interviews by Dick Pope Institute researchers with Latin American visitors to Florida have revealed that the number one problem faced by these visitors has to do with the "language barrier." Not only are there too few people with bilingual skills working in the visitor industry, but "signing" is apparently very inadequate. At many places (attractions, hotels, restaurants, etc.), one of the few accommodations to the language barrier are the signs on restroom doors.

Those Latins who have been interviewed have had little to say about hotel accommodations, either in a positive or negative way. They are generally satisfied if their accommodations are clean and comfortable. One thing many Latins are surprised to discover is that it is safe to drink tap water in the hotels. In their home countries, many are accustomed to drinking bottled water.

In an American restaurant, the Latin visitor generally presents a series of problems. It can start when he is presented with an English menu and told that there are no menus in his own native language. Tipping presents a problem, too. Many Latins are not familiar with American tipping customs, and it is not an uncommon story about the Latin who leaves behind a 20 cent tip in a fancy restaurant. If he is told, however, that it is customary to leave a 15 percent tip if he is pleased with the service he has received, he is generally very comfortable with this. (One firm, after printing tipping suggestions and providing these to foreign guests, found that its employees' tips quickly doubled.) The manner in which a Latin diner seeks the attention of a waiter or waitress can also cause serious problems. "Pssst!" and finger-snapping, perfectly acceptable customs in native Latin cultures, can easily offend the unenlightened waiter or waitress. It would be easy enough, it seems, to educate Americans to these cultural differences -- and thereby allow them to more effectively and profitably serve their foreign guests.

For the most part, the typical Latin visitor is very satisfied with the attractions he visits in Florida. His major complaint has to do with inadequate signing. He is also something less than totally pleased when he is not helped to understand a particular "educational" attraction. "Shows" at several parks are also likely to leave the Latin somewhat bewildered if there is no effort to explain things in his native tongue. On the whole, however, Latin guests are clearly amazed by the variety of attractions they find in Florida.

What perhaps impresses Latins most about Florida (and America) is the efficiency, organization, and cleanliness they encounter. The first-time visitor seems

to arrive with the idea that much of America -- including its people -- is mechanized. But they are surprised to find that the people are not robots, and that they smile a lot!

Potentially the most troublesome finding the interviewers have reported is the negative reaction of some domestic vacationers toward the Latin visitor. It is true that many Latins are more festive, louder, and "routier." They sometimes crash the front lines (an acceptable behavior in some foreign cultures). They talk during "shows" (perhaps because they don't know what's going on).

Obviously, the international visitor is different in

several important ways from the domestic vacationer from Hartford or Harrisburg. The visitor industry should continue to move toward a better understanding of the international guest and adapt to his special and unique needs.

One country with a much longer tradition of catering to foreign visitors is Mexico. The following pages contain an edited version of a presentation made by *William Cobb*, who represents the Mexican Government Tourism Office in Washington, D.C. The presentation was made at a 1981 conference on "Reception Services for International Visitors", and it discusses some of the special efforts that Mexico has made over the years to better accommodate its foreign visitors. □

Mexico's Visitor Service System

by WILLIAM COBB

MEXICAN GOVERNMENT TOURISM OFFICE, Washington, D.C.

One of the reasons I was interested in appearing on this program is because I think that Mexico, although an underdeveloped country, has done things that we in the United States can learn from when it comes to receptive tourism. Tourism is much more important to Mexico than it is to the United States, let's face it. Tourism is the second largest earner of dollars in Mexico. In major coast cities, I have been told that perhaps eighteen percent of the hotel rooms are occupied by foreign visitors at one time or the other. In Mexico, almost every day, forty-four percent of the hotel rooms are occupied by foreign visitors. Some of you who go to Acapulco and stay at the Princess think that one hundred percent of the hotel rooms are occupied by foreign visitors, and in that hotel, they may be. But for the most part, Mexicans themselves occupy fifty to fifty-five percent of the hotel rooms in Mexico at any given time, and Americans and other foreign visitors occupy about forty-five percent of the hotel rooms. Mexico receives each year about 4,500,000 foreign visitors. Eighty percent of these come from the United States. Most of them come from the southern tier of the United States. The services that Mexico offers to its foreign visitors reflect needs that have developed over a period of years, and I'd just like to touch on some of them for you so that you'll understand them, and perhaps take an idea or two back

with you.

First of all, Mexico operates a series of road emergency vehicles called the Green Angels. There are two hundred of these mobile repair units on the highways in Mexico every single day, traversing some 20,000 miles of paved road twice a day. These vehicles are manned by bilingual mechanics, and they stop and service both Mexican and foreign vehicles that need assistance on the highways. There is no charge for the mechanical service, no charge for the translation. The only charge is for gasoline if you need extra gasoline, or for any repair parts that may be necessary to put your vehicle back in order. The Green Angels do not, however, enter the cities of Mexico, or at least they did not until last year when it became apparent that there were Americans who got stranded at the edge of town where the Green Angels were not allowed to operate at that time. So the Ministry of Tourism, which operates the Green Angels, has now entered into an agreement with certain border cities and other cities in Mexico, that will allow the Green Angels to service vehicles on the edge of town that may get into trouble.

Another facilitative system Mexico has adopted in recent years is the system of the pictogram, or picture of a location, to help one identify where one is going. It is particularly useful in the Mexico City subway. At the time the Mexico City subway was built, there was

a realization that probably twenty percent of the people who used it might not read or write and couldn't determine which station they were going to or when to get off. A solution was devised whereby the Mexico City subway is now coded by pictograms, and anyone knows if he looks at the airplane, that he's going to the airplane station, or if he looks at the mound of oranges that he's going to the market, or if he looks at the Liberty Bell, that he's going to the Central Square in Mexico, the Zocolo, or if he's going to any of the thirty-five stations on the Mexico City subway, each has its own individual pictogram. This system has been picked up in the United States in the city of Washington by the managers of the National Zoo, where the same man who did the pictograms for the Mexico City subway has done the pictograms for the Zoo, which helps children of all ages see the sights that they want to see without necessarily having to read the sign.

Another thing Mexico did at the time of the Olympics, which has been very useful, was to color-code the streets of the City leading to the principal events of the Olympics. For the track and field events, the normal highjumping, running and the like, there was a color-code of blue, and all the streets leading out to the main stadium were color-coded blue. For the indoor sports such as basketball, there was a color-code of orange. The lighting markers on the streets, where the street lights were, were all color-coded, so that visitors, by following the code of the color and looking at the light posts along the way, could tell whether they were on the right route or on the wrong route to the destination they wanted to go to. Maps that were available to all tourists were printed with the color codes on them.

Another thing that we have in Mexico, and I would recommend it to the hoteliers in this country, is laundry lists in more than the English language or the Spanish language. A perfectly simple device, but every hotel in Mexico provides the client with a laundry list that's at least in Spanish and English and often in French. Have you ever seen a laundry list in the United States in any language but English? It would be so simple to make this little change. It would be of such great help to the French-speaking people who visit us from Canada, or to the Spanish-speaking people who visit us from Mexico and from Europe and from South America.

Another thing that we have in Mexico that has proven very useful is a traveler's hotline, operated in Mexico City by the government, for emergency use. Anyone can dial 250-0123 and receive an answer to any question in any of five or six languages. Recently, Japanese was added to the languages available on the Travel Hotline because of the increasing number of Japanese visitors coming to Mexico.

The Mexico City Police have an interesting device for helping tourists. All the policemen who are qualified in more than one language wear on their uniforms the flag of the country whose language they speak. You will see in Mexico policemen wearing a Mexican flag, an American or British flag, a French flag; it indicates that they know three languages. I

“ . . . receive an answer to any question in any of five or six languages.”

don't yet know of any policeman who've got the Japanese flag on their lapel, but that may come. I do know that the bellhops in the Marie Isabel Hotel can all count from one to twenty in Japanese, so that they can take the Japanese visitor to the proper floor.

Another thing we have in Mexico is foreign language guides in the major museums. One thing we don't have is foreign language signs under the exhibits. There seems to be something peculiarly chauvinistic about museum managers the world around, and it's the rare national museum one visits that has signs in more than one language. Certainly in Washington, we don't have any of our national museums with the signs in Spanish or French or German, and the same is true in the great Mexico City Museum of Anthropology; there are no signs in English. But guide service, qualified, experienced, well-educated guide service, is available in many different languages in that museum.

Another thing we've found useful to do in Mexico is not to inspect the baggage of bonafide tourists entering the country. This has been a recent change, and it has worked well. I wonder if that day will even come when the United States will do the same thing; I have my doubts. But I do think that there are systems open to us that we could continue to look at to make the baggage processing system more convenient than it presently is. I should also remind you, as you probably know, that most menus in hotels and restaurants in Mexico are

printed in English and in Spanish and some in French, some in German. The Mexican government also prints its promotional brochures in Japanese, English, French, and German. The Mexican Tourism Secretariat, which inspects all the menus for price control and conformity with the law, makes sure that they are in at least two languages if they're to be offered to tourists.

I'm pleased to tell you that in Mexico City, you can get twenty-four hour banking at the Mexico City Airport, three hundred and sixty-five days a year. This is a service offered by the commercial banks because they compete. There are three different commercial banks located at the Airport and each one has the opportunity of staying open twenty-four hours a day on a circulating schedule. In Acapulco, eighteen-hour a day banking service is available at the new Acapulco Center, three hundred and sixty-five days a year.

These are some of the things that Mexico has done to meet the needs of its foreign tourists. Those of you who go to Mexico can pick up other ideas and bring them back here, because as we exchange ideas, as we learn about what other people are doing, we too can improve our receptive services and make the world just a little bit better for our friends. □

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