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Tourism Barometer

VOLUME 1, NUMBER 4

WINTER 1982

The four quarter ahead forecasts of out-of-state domestic visitor arrivals for the first through the fourth quarter of 1983 are presented in the graph below and also in the table on the following page. These forecasts project 33,249,000 total domestic visitor arrivals for the four quarters of 1983. The 1983 forecast is 6.2 percent higher than the actual visitor arrivals for 1981 and 1.2 percent lower than the estimated visitor arrivals for 1982.

While the projected 1983 figures appear to be extremely conservative, they incorporate the data of 1981, which was an extremely bad year for tourism in the state of Florida. With this in mind, the user should interpret these projections as being a lower limit for tourism activity in 1983. However, other indicators currently not contained in the model suggest a more positive performance level. As a result, efforts are now underway to include variables that should provide more optimistic projections. The results of these efforts should be available in the Spring 1983 issue of the TOURISM BAROMETER.

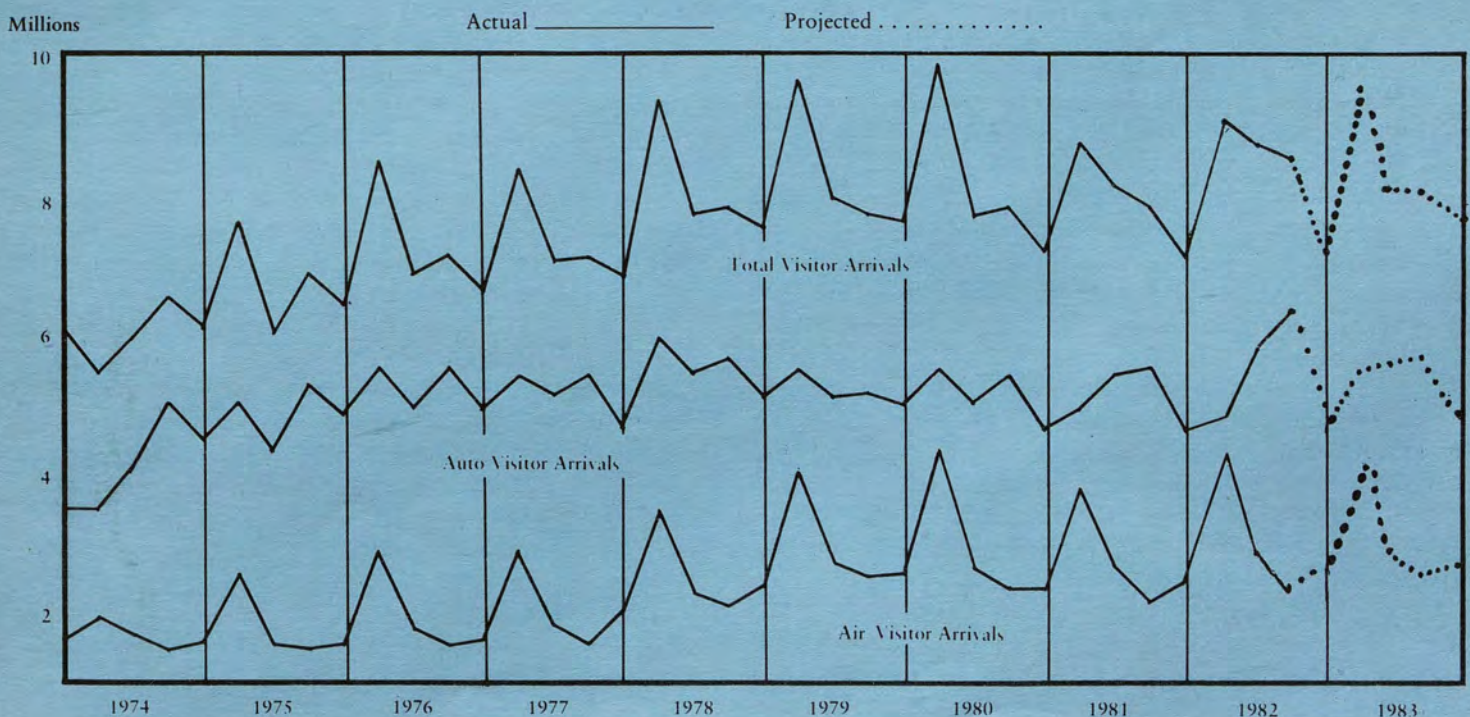
The first-quarter of 1983, is currently forecasted to total 9.556 million visitors. This estimate is only 41,000 visitors above the forecast made in the Fall 1982 TOURISM BAROMETER. However, the Summer 1982 forecast was 224,000 visitors greater than the current forecast. The first quarter has proven, in the more recent past, to be an extremely strong period for air arrivals

(normally 40% above the quarterly average). Nevertheless, the projected vitality in the first quarter of 1983 is based on an expected 11.0% increase in arrivals by automobile. This increase is based on an analysis of specified macroeconomic variables, the past history of auto arrivals, and previous "forecasting" errors.

Total visitor arrivals for 1983-II are projected to be 8.9% beneath the actual arrivals in 1982-II. However, this pessimism should be interpreted with caution. The second quarter of 1982 was a record setter - auto arrivals were more than 8 percent larger than during any previously recorded second quarter. The current forecasts of auto, air and total arrivals have incorporated the "new" information contained in the forecast errors obtained in the Institute's previous forecasts of second quarter 1982 arrivals. Since the 1982-II forecast significantly underestimated arrivals, the current forecast of total arrivals for 1983-II has been revised upward and is 4.1% above the previous forecast made in the Fall. The magnitude of the revision merely reflects the value of new information made available during the intervening 3 months.

At this point in time, third quarter visitor arrivals for 1983 can be expected to be 8.049 million visitors. Again, as in the case of second quarter arrivals, the past quarter has resulted in an upward revision in the order of 5.3%. The increased optimism has been exclusively in terms of a more favorable expectation regarding

Out-of-State Visitor Arrivals



Out of State Visitor Arrivals-Quarterly: 1983-I through 1983-IV (millions)

Series	1983-I	% Change from 1982-I	1983-II	% Change from 1982-II	1983-III	% Change from 1982-III	1983-IV	% Change from 1982-IV
	Auto	5.323	+11.0	5.217	-11.2	5.553	-10.0	4.950
Air	4.233	-0.4	2.755	-2.8	2.496	+2.9	2.722	NA
Total	9.556	+5.6	7.972	-8.4	8.049	-6.4	7.672	NA

auto arrivals, as was the case for the second quarter.

The fourth quarter of 1983 is expected to record 7.672 million total visitor arrivals. This forecast reflects a 5.8% increase over the projected arrivals for the same period of 1982 and an increase of just under 9% compared to the actual arrivals in the fourth quarter of 1981.

Despite the fact that 1982 will likely prove to be somewhat disappointing to the Florida visitor industry, given the state of the national economy and the plight of many formerly prosperous industries such as automobiles and steel, the tourism sector of the Florida economy performed reasonably well. Given the conventional wisdom that the Florida economy in general and Florida tourism in particular tend to follow business cycles in the national economy; most economic analysts would have expected Florida's economic performance to have been much worse. The resiliency of Florida tourism is most impressive in light of the length and severity of the national recession.

As is generally the case, the national economy is currently providing mixed signals. On the positive side - inflation has been

substantially reduced, real personal income per capita has risen, gas prices have fallen and are expected to continue to fall, interest rates have shown signs of dropping, auto sales have increased in response to rebates and more attractive interest rates, unemployment may have peaked, and EPCOT will increase Florida's national and international visibility. On the negative side - consumers appear reluctant to provide the necessary stimulus for recovery, large government deficits appear extremely likely, the progress made in reducing interest rates by lowering inflationary expectations might be obliterated by the tremendous borrowing of the U.S. Treasury, and appreciations of the U.S. dollar in international currency markets is not consistent with growth in the United States share of the international tourism market.

Despite the mixed signals, the Dick Pope Institute believes there is more to be positive than negative about concerning the Florida visitor industry in the upcoming year. However, this optimism must be tempered by the realities of the current economic situation.

The Overseas Demand for Tourism in the United States*

by Dr. William B. Stronge, Chairman

Department of Economics

Florida Atlantic University

Ever since World War II, there has been an annual exodus of U.S. tourists to overseas countries. Between 1960 and 1981, the number of U.S. residents who traveled overseas, increased from 1.634 million to 8.040 million, an increase of almost 400 percent. Phenomenal as this growth was, however, it was overshadowed by the growth in the number of overseas residents who visited the United States. Between 1960 and 1981, the number of overseas visitors to the United States increased from 0.602 million to 8.069 million, an increase of over 1200 percent.

Receipts from overseas tourists, and expenditures by U.S. travelers overseas, distinguished by region of the world and excluding passenger fares for transoceanic travel, are shown in Tables 1 and 2. The regional classification is the most comprehensive for which reasonably consistent data are available over the entire period.

In 1981, Western Europeans spent \$2.152 billion on travel in the United State and this amounted to 34.7 percent of the total. Central Americans and residents of the West Indies and Caribbean spent \$0.474 billion (over 8 percent), and South Americans spent \$1,108 billion or almost 20 percent. The remainder was spent by residents of the Rest of the World, primarily Japan and Oceania.

Tourists expenditures are the product of the number of tourists and their average per capita expenditure. Table 3 shows that the most rapid growth in the number of visitors occurred among

residents of Europe and the Rest of the World, although South American visitors grew most rapidly since 1975.

The per capita expenditures in Table 4 show that the highest expenditures are made by South Americans, the next highest by Rest of the World (Japanese), then Western Europeans and finally Central Americans.

An important determinant of per capita expenditures is the purpose of visit by the tourist. An overseas resident may visit the U.S. for one of four possible reasons: business, pleasure, transit or study. The expenditures of persons in transit are usually very low, and the expenditures of persons visiting for study are very high because the former stay a very short period of time, and the latter have an extended stay. Business visitors have relatively high per capita expenditures, and pleasure visitors have relatively low expenditures. The latter usually spend a relatively large part of their stay visiting friends and relatives.

The proportions of overseas arrivals in the U.S. accounted for by pleasure travelers from each of the four regions of the world are given in Table 5. The table shows that the growth in the importance of pleasure travel was most rapid for Western Europe and the Rest of the World, and these were the areas with the slowest growth in per capita expenditure. Correspondingly, the most rapid growth in expenditures per capita was in Central and South America, the regions with the slowest growth in the share of pleasure travel.

A second factor that is important for explaining per capita expenditures is length of stay. Such data are not available over the 1960-1980 period, although figures for 1979 have been developed

by the author. One of the major determinants of length of stay is distance traveled to the U.S. because tourists tend to spread the (fixed) transportation cost over a large number of days the higher is the cost incurred. This role of length of stay is evident from Table 4 where per capita expenditures are seen to be positively correlated with distance from the U.S., Western European and Central Americans are relatively close and have relatively low per capita expenditures. Rest of the World residents and at least some South Americans are relatively far and have higher per capita expenditures.

Finally, expenditures per capita are relatively high by Central and South Americans because shopping is an important part of their trips. Shopping will be more important the less available or more expensive are consumer durables in the home country, and the closer is the home country to the U.S. These two factors are present for much of Central America and the West Indies, and for the Northern part of South America (Venezuela and Colombia).

Economic theory suggests that principal determinants of expenditures by overseas tourists in the United States will be the U.S. price level relative to prices overseas expressed in dollars, and the purchasing power of overseas income in the United States.

After adjustment for inflation, it is clear that the overseas tourist expenditures had two exceptionally strong growth periods; 1960-65 and 1975-80. The first period was characterized by slow U.S. inflation relative to overseas countries, a declining cost of air travel and rapid income growth. The growth in overseas travel to the United States was slower during 1965-70 as European devaluations eroded the U.S. price advantage. In 1970-75, the sharp rise in airfares and devaluation of the dollar prevented the rise in foreign income from exerting its full impact on overseas visitors. Moderation in airfares and a relatively rapid rise in overseas incomes during 1975-80 led to very rapid growth in overseas spending in the United States.

The results of the research show that overseas tourist expenditures (in dollars) are income inelastic (when income is measured in

dollars) but price elastic. They are also inelastic with respect to the dollar airfare**. The implication of these results is that rapid growth in overseas tourism to the United States during the period 1960-80 was primarily due to favorable price developments, rather than to a growth in overseas income. The Rest of the World countries expenditures to the United States are income elastic but relatively insensitive to airfares, whereas European expenditures are income inelastic, but more sensitive to airfares. Central American expenditures are much less sensitive to income and much more sensitive to airfares.

These findings are consistent with the view that long distance travelers (Rest of the World and South America) have tourist expenditures with the highest income elasticity and the lowest airfare elasticities; short haul travelers (Central America and Western Europe) have the lowest income elasticity and the highest airfare elasticity. Since length of stay is strongly positively correlated with distance traveled, long distance travelers reduce the airfare cost per day in the United States, and hence, their expenditures are relatively insensitive to this variable. Short haul travelers incur relatively high per day airfare costs and so their expenditures are more sensitive to these costs. Because long distance travelers stay a long period, their expenditures in the United States are more in line with their income than short haul travelers. The latter may visit relatives or friends and, hence, have low expenditures relative to their income or, indeed, they may live at a standard far above the level to which they are accustomed (during a visit to the United States).

**This section is part of a paper presented at the Atlantic Economic Conference on October 8, 1982 in Miami Beach. Dr. Stronge is an active researcher on the economics of international tourism.*

***Elasticity refers to the responsiveness of the overseas demand for tourism to changes in variables that determine this demand. Elastic demand implies that the percentage change in demand exceeds the percentage change in the causal variable (e.g., price, airfares, or income). Inelastic demand implies that the percentage change in demand is less than the percentage change in the causal variable.*

TABLE 1
U.S. Receipts from Overseas Visitors 1960-1981
(\$ billion and percent)

Year	Total		Western Europe		Central America		South America		Rest of the World	
	\$	%	\$	%	\$	%	\$	%	\$	%
1960	0.224	100.0	0.087	38.8	0.040	17.9	0.046	20.5	0.051	22.8
1965	0.500	100.0	0.200	40.0	0.093	18.6	0.107	21.4	0.100	20.0
1970	0.889	100.0	0.318	35.8	0.170	19.1	0.164	18.4	0.237	26.7
1975	1.825	100.0	0.611	33.5	0.206	11.3	0.303	16.6	0.705	38.6
1980	5.108	100.0	1.942	38.0	0.417	8.2	0.277	19.1	1.772	34.5
1981	5.716	100.0	2.152	37.7	0.474	8.3	1.108	19.4	1.982	34.7



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Dick Pope Sr. Institute for Tourism Studies
College of Business Administration
University of Central Florida
Orlando, Florida 32816

TABLE 2
U.S. Expenditures for Overseas Travel 1960-1981
(\$ billion)

Year	Total		Western Europe		Central America		South America		Rest of the World	
	Exp.	Surplus	Exp.	Surplus	Exp.	Surplus	Exp.	Surplus	Exp.	Surplus
1960	0.987	-0.763	0.643	-0.556	0.166	-0.126	0.045	0.001	0.133	-0.082
1965	1.298	-0.798	0.795	-0.595	0.220	-0.127	0.068	0.039	0.215	-0.115
1970	2.184	-1.295	1.310	-0.992	0.390	-0.220	0.090	0.074	0.394	-0.157
1975	3.474	-1.649	1.709	-1.098	0.787	-0.581	0.242	0.061	0.736	-0.031
1980	6.016	-0.908	3.021	-1.079	1.134	-0.717	0.392	0.585	1.078	-0.694
1981	6.547	-0.831	3.123	-0.917	1.277	-0.803	0.383	0.725	1.300	-0.682

TABLE 3
Flows of Overseas Tourists Into and Out Of the United States
(000's)

Year	Total			Europe			Central America			South America			Rest of the World		
	In-Flow	Out-Flow	Surplus	In-Flow	Out-Flow	Surplus	In-Flow	Out-Flow	Surplus	In-Flow	Out-Flow	Surplus	In-Flow	Out-Flow	Surplus
1960	602	1634	-1032	267	832	-565	144	641	-497	105	71	34	86	90	-4
1965	1204	2623	-1419	570	1405	-835	264	891	-627	186	127	59	184	200	-16
1970	2228	5260	-3032	984	2898	-1914	484	1663	-1179	318	249	69	502	450	52
1975	3674	6354	-2680	1500	3185	-1685	478	2065	-1587	438	447	-9	1258	657	601
1980	7706	8163	-457	3368	3934	-566	835	2624	-1789	1168	594	574	2335	1011	1324
1981	8069	8040	29	3530	3931	-401	869	2453	-1584	1221	567	654	2449	1089	1360

TABLE 4
Per Capita Expenditures by Overseas Visitors to the United States
1960-1981 (\$)

	Total Overseas	Western Europe	Central America	South America	Rest of the World
1960	372	340	278	438	526
1965	415	369	352	575	472
1970	389	323	351	516	472
1980	662	576	499	835	759
1981	708	609	545	908	809

TABLE 5
Pleasure Visitors as a Proportion of All Arrivals
1960-1980 (percent)

	Total Overseas	Western Europe	Central America	South America	Rest of the World
1960	64.0	58.6	75.0	70.5	54.6
1965	71.6	67.0	84.5	81.7	59.4
1970	74.6	73.8	86.8	80.2	60.8
1975	79.2	77.3	84.9	84.5	77.4
1980	81.9	80.8	85.6	88.4	78.9
1981	81.0	80.4	85.0	87.2	77.2

Foreign Exchange Rates & The Florida Visitor Industry

In the previous issue of the TOURISM BAROMETER, foreign exchange rates were presented for West Germany, Canada, Mexico, Japan and the United Kingdom. An intuitive explanation of the causal relationship between exchange rates and international tourism was also developed. In this issue of the TOURISM BAROMETER, exchange rate data are presented for five additional countries - South Africa, Sweden, France, Brazil, and Argentina. The reader should note that the exchange rates for Brazil and Argentina are measured in terms of cruzeiros and pesos per dollar respectively. Since the graph of each increases over time, more cruzeiros and pesos are required in exchange for one dollar and these currencies have depreciated. Thus, a visit to the United States has recently become more expensive to Brazilians and Argentinians.

The August 1982 exchange rate for South Africa was 86.77 cents per rand. As displayed in the graph below, this rate has declined significantly since mid-1980. In addition, the average and minimum exchange rates for the decade of the 1970's were 129.96 and 114.69 respectively. The August 1982 rate is approximately 33 percent less than the 1970's average.

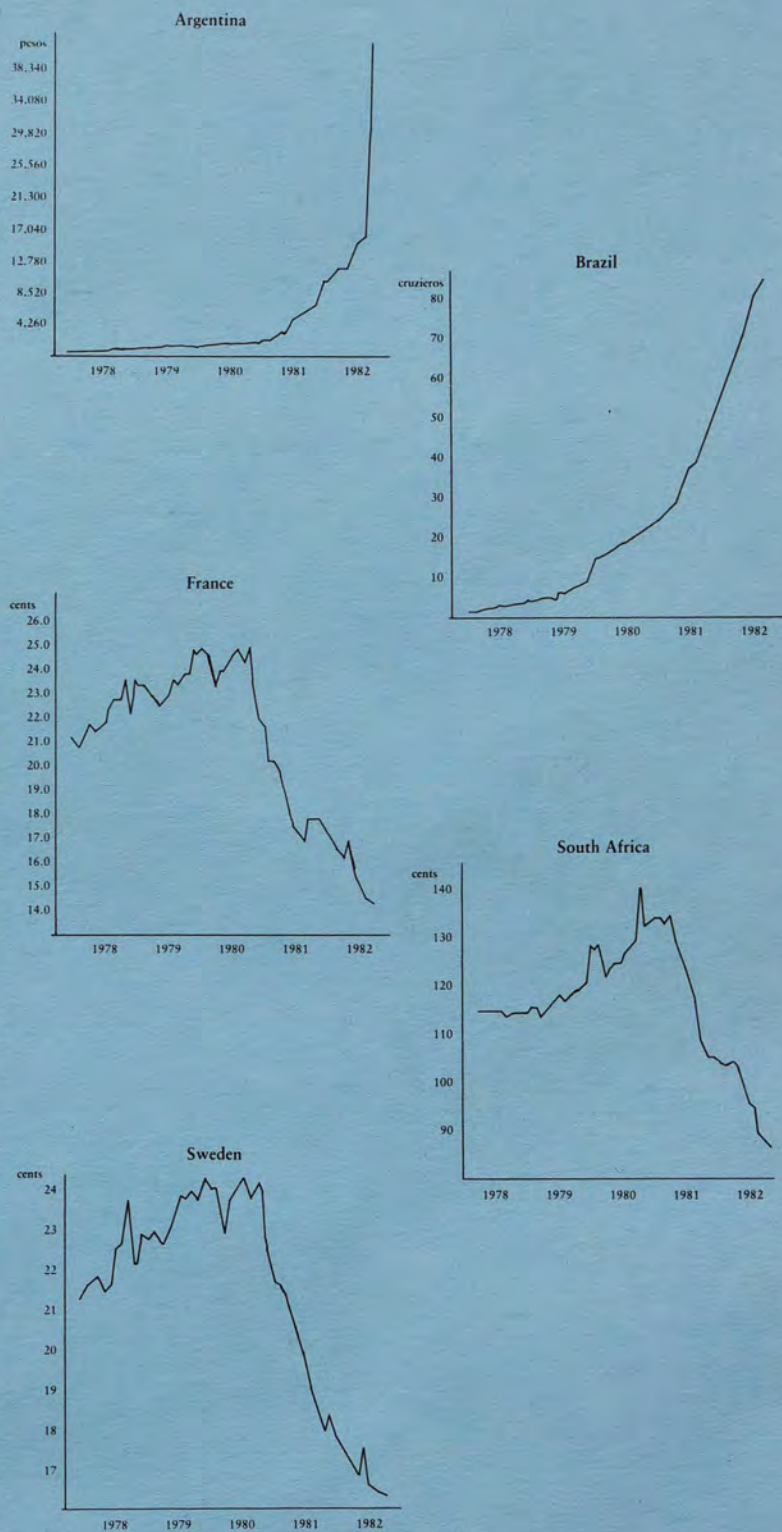
In the case of Sweden, the August 1982 exchange rate was 16.276 cents per krona. The Swedish exchange rate graph reflects a steep and virtually continuous decline since early 1980. The average and minimum exchange rates for the 1970's were 22.04 and 19.225 respectively. Thus, the recent level of 16.276, represents a 26 percent decline relative to the average exchange rate for the 1970's.

The French franc stood at 14.433 cents as of August 1982. Moreover the relevant graph again displays an almost continuous decline since early 1982. The decade of the 1970's recorded average and minimum exchange rates of 20.99 and 18.01 cents per franc respectively. The recent level of 14.433 reflects a 31 percent decrease relative to the average for the 1970's.

In the case of Brazil, the September 1982 exchange rate was 182.71 cruzeiros per dollar. The same rate was 16.25 cruzeiros per dollar in January 1978. In addition the average and minimum rates for the 1970's were 10.81 and 4.35. Since a dollar recently buys more cruzeiros, the Brazilian currency has depreciated. The extent of that depreciation has been enormous. Specifically, the September rate reflects a 1,590 percent increase in the value of the dollar relative to the cruzeiro, if compared to the 1970's average rate.

The Argentinian peso has depreciated relative to the dollar much like the Brazilian cruzeiro. The September 1982 rate of 38,975 pesos per dollar is 6 times the same rate for January 1978. Moreover, the average and minimum rates for the 1970's were 276.91 and 3.5 and the dollar appreciated by 13,975 percent if compared to the 1970's average.

The findings of the exchange rate analysis in this and the previous TOURISM BAROMETER suggests significant appreciation in the value of the U.S. dollar in international currency markets. However, the strength of the dollar brings mixed blessings. For international tourism, the exchange rate variations tend to suggest increases in Americans travelling abroad and reductions in international visitors to the United States. Despite the importance of exchange rates in shaping the decisions to travel abroad (see section by William B. Stronge), recognize that this is but one of numerous factors and the above analysis should be viewed as suggestive rather than conclusive.



Notes: Exchange rates are measured as follows:

- South Africa - cents per rand
- France - cents per franc
- Argentina - pesos per dollar
- Sweden - cents per krona
- Brazil - cruzeiros per dollar

Hospitality Management Education Opportunities in the U.S. and Florida

Travel and tourism represents the third largest retail industry in the U.S. averaging \$160 billion in domestic and international spending in 1980. Tourism is among the top three industries in 38 states employing 4.5 million Americans at every level of skill with the indirect production of another 2.2 million supporting jobs. Tourism is a highly diversified industry with one million component companies ranging from small travel agencies to large airlines and hotel chains. Forecasts indicate it will be the largest business activity in the world by the year 2010.

Furthermore, U.S. employment is expected to rise over 20 percent from 1980 to 1985. Of the 34 occupational categories believed to show the most growth, 70 percent have been identified as being travel and tourism related. Data generated in 1980 by the U.S. Travel Data Center "indicates that jobs in travel, tourism, and recreation industries are expected to increase faster than the 29 percent growth in total U.S. private employment projected between 1977 and 1990 by the U.S. Department of Labor."

In Florida, tourism is clearly the number one industry in the state employing 580,000 in 1981. Just under 36 million tourists visited the state in 1981 spending roughly \$17 billion dollars. The future for tourism in Florida, and Central Florida in particular, continues to expand with the development of such projects as EPCOT, MCA's Universal Studios and the Orange County Civic Center. Out of state visitor arrivals for 1983 are predicted to increase by 3.8 percent over the expected visitor arrivals for 1982. This trend is expected to continue at an annual growth rate exceeding 5 percent over the 1983-1986 period. The expectation of an improving national economy, steady increases in the Sunbelt population, a resurgence of air charters, the increasing popularity of tour packages, an expansion of the family market, and more meetings and convention trade all point to a continued strengthening in Florida's tourism industry.

These facts all indicate the need for Hospitality Management programs throughout the U.S. and, in particular, Florida. Hospitality programs are needed to provide the skilled manpower necessary to direct and develop the travel and tourism industry into an efficient and effective sector in our economy. As a result, the present paper overviews Hospitality Management education in the U.S. and Florida. This overview should provide the interested reader with some of the options currently available in this field of endeavor.

II.

Hospitality education in the U.S. encompasses a broad range of programs. These programs include the concerns of hotel and motels, travel agencies, restaurants, attractions, and other important components in the travel industry. In this paper, hospitality education will be defined as the education of students interested in all phases of the travel and tourism industry. While this "umbrella" concept is admittedly broad it highlights the diversity of such programs and allows us to delve into the types of programs which are now available to the interested student.

Hospitality education programs in the U.S. utilize two approaches to educating students entering the tourist industry. Figure 1 diagrammatically compares these two approaches. The first approach is largely technical with the other being more of a managerial orientation. Technical schools tend to have a strong emphasis on operating skills with courses covering the detailed

functions of various aspects of the industry. Much weight is placed on a nuts and bolts approach to education using a staff who are usually operationally oriented. Examples of courses in these programs are "Airline Ticketing", "Classical Cuisine", and "Meat Analysis." This approach produces a graduate who is extremely capable of running or doing an operation.

On the other hand, schools utilizing the managerial orientation have a more academically based program which stresses traditional business disciplines in a hospitality and tourism setting. The student's education is generally less technical and more analytical. Some work experience in the hospitality and tourism field is usually required in order to expose the student to the practical side of the industry. These programs produce students who are more flexible and are generally capable of fitting into managerial positions in the hospitality industry.

Figure 1:
Two Major Educational Orientations in Hospitality Education

Hospitality Education	
Technical	Managerial
- primarily focused on operators of first level management	- primarily focused on middle to upper level management
- Technical in nature	- analytical in nature
- predominately taught in junior colleges	- predominately taught in four year colleges and universities
- exemplary programs	- exemplary programs
- Daytona Beach Community College	- Cornell University
- Bucks County Community College	- University of Nevada-Las Vegas
- Mid-Florida Technical	- University of Hawaii at Manoa
- Tampa Bay Area Vocational-Technical Center	- Purdue University
	- University of Denver

Currently there are 188 Hospitality Management programs (or at least called by that name) being offered at colleges and universities in the United States. Of this total, 115 of them offer associate degrees, 48 offer bachelor degrees, 11 offer master degrees, 4 offer doctorate degrees and 9 offer certificates. The associate degree programs are designed primarily to prepare individuals for low level management positions. Examples of courses required for an associate degree would be, "Essentials of Nutrition," "Introduction to the Lodging Industry," and "Food Service Sanitation."

The bachelor of science degree is usually designed to prepare the student for middle to upper level management in the hospitality industry. The experience usually consists of two years of general education, and two years of hospitality and tourism education. As noted before, many four year programs require students to complete between 600 and 800 hours of practical work experience or internship related to his or her specialized interest. This field experience allows the student to put classroom theory into prac-

tice in a paid position within the hospitality industry. Usually this requirement is fulfilled during their junior or senior year.

III.

Florida's educational institutions presently offer hospitality education in management, mid-management, vocational-technical, and correspondence course programs. Only Florida State University and Florida International University offer upper division managerial curriculums. However, the University of Central Florida is currently in the planning stage for such a program.

Florida State offers an undergraduate degree in Hotel and Restaurant Management. The program tends to emphasize more direct, staff oriented courses which you would expect to find in a mid-management curriculum. Sample courses are entitled "Design and Layout of Hotel," "Motel and Restaurant Operations," "Food Service Engineering," and "Cost Control Systems in the Hotel and Restaurant Industry."

FIU offers a much more developed program in Hospitality Management offering both a Bachelor's and Master's degree. In the Bachelor's program the school operates on a single major concept in which 49 semester credits is required of all students. The program requires an additional 15 semester credits of electives which may be used by the student to concentrate in one of the following areas: "Hotel/Motel Management," "International Hotel/Motel Management," "Restaurant and Food Service Management," "Tourism and Travel Management," "Coop, Condominium and Apartment House Management" or "General Hospitality Management."

The programs also require the student to earn three semester hours in an Advanced Internship with a local business in the hospitality industry. The Masters program requires 33 hours of advanced education in "Hospitality Law," "Research and Statistical Methods," and "Financial Management." Although the program at FIU is a more comprehensive hospitality curriculum

than Florida State's, it tends to concentrate on the international hotel/motel trade in and around Miami. Still, the School has been designated a *Program of Distinction* by the Florida Board of Regents.

There are presently fifteen two-year Colleges in the State of Florida that offer two-year degree programs designed to prepare individuals for entry level Management Positions in the hospitality industry. These include Valencia Community College, Brevard Community College, and Daytona Beach Community College to name a few. Course offerings are primarily constructed to prepare the student for job entry at the end of two years. In most cases however, the program maintains a structure that will be acceptable for transfer to senior institutions upon graduation. A few of the courses commonly offered in their Hospitality Management degree programs are, "Intro to the Hospitality Industry," "Hotel-Motel Front Office Procedure," and "Hospitality Law."

In the area of Vocational/Technical and Adult Education in the Hospitality field there are presently twelve institutions which offer various programs. These courses are designed to provide introductory, refresher, and advanced training in the more than 60 different types of positions available in the Hospitality Industry. Subjects offered on the Vo/Tech level include "Front Office Management," "Waiter-Waitress Training," "Food Handling and Sanitation," as well as many others. Centers and institutes offering Vo/Tech training include: Mid-Florida Technical Institute in Orlando; Tampa Bay Area Vo/Tech Center in Tampa; and St. Augustine Technical Center in St. Augustine.

As one can see there are numerous opportunities for the prospective student in the Hospitality Management Field. What the student must do is to identify the appropriate program and curriculum which will satisfy the needs of his or her desires in terms of employment possibilities. A careful matching of one's desires with potential programs should help ensure a rewarding and lasting career in an extremely exciting industry.

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George J. Becker, Jr.
President
Sea World of Florida, Inc.

An Open Letter to the Travel Industry:

This issue of the TOURISM BAROMETER marks the end of the first year of publication of this aid to the travel industry. This event is significant because it represents the first sustained comprehensive forecasting effort on behalf of the State of Florida. This effort was made possible largely on the basis of grants received from the ORLANDO SENTINEL and the Division of Tourism of the State of Florida.

However, what is perhaps more significant is the fact that the Dick Pope, Sr. Institute for Tourism Studies at the University of Central Florida has established itself as a viable entity which can and does service the travel industry in the State of Florida. In the short three year time span of which the Institute has been in existence and I have been Chairman of the Advisory Board, I have seen a host of positive research and educational programs emanate from their efforts. In addition to the TOURISM BAROMETER, numerous other studies have been initiated and/or completed, and significant strides have been made in the creation of a Hospitality Management Program at the University of Central Florida. All of these activities are indeed commendable and are of direct benefit to the travel industry in the State of Florida.

The Institute is now at a point where it needs our support if it is to continue to further expand its services to the industry. The support needed is not only financial, but it includes moral and public support of the usefulness of the Institute to both government and the private sector. Your help is needed to ensure that the Institute for Tourism Studies remains a viable organization in the years to come. I personally hope we can count on your support in the future.

If you or your organization are willing to support the Institute's efforts in anyway, please speak up and be heard. The Institute is in the throes of planning a rather aggressive program of activities in the future which should benefit us all. Please do your part to support the program.

We look forward to hearing from you in the near future.

Sincerely,

George Becker
President, Sea World of Florida
and
Chairman of the Advisory Board
Dick Pope, Sr. Institute for Tourism Studies