


9-1-1988

## Tourism Barometer II

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# Tourism Barometer II

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The **Tourism Barometer II** forecasts generated for the first and second quarters of 1989 foresee an increase of 11.11% and 9.44%, respectively. The increase could be attributed to a few factors. First, some of the air carriers have reduced the air fares previously increased in the Fall of 1988, and offered special promotional fares for the first quarter of 1989.

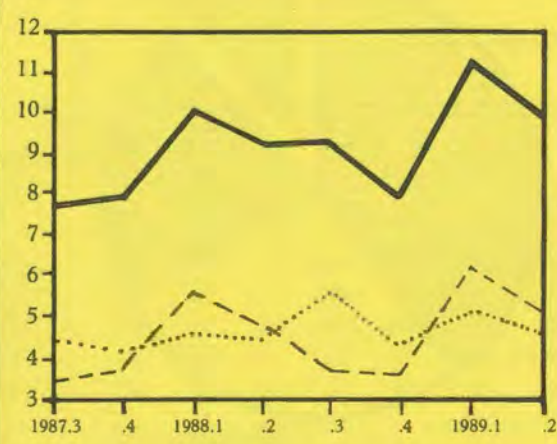
Second, sub-segments of the Florida tourist market have exhibited substantial growth. The *Travel Industry Indicators* (December, 1988) reported that the cruise line industry announced a double digit growth in the past year. Needless to mention, this industry has an impact on the number of air arrivals in South Florida airports as well as the economic contribution to Florida tourism and hospitality industries.

The foreign tourist market segment has also increased its share in Florida arrivals. The rate of exchange of the U.S. dollar, coupled with reasonable hotel room rates and competitive tour package prices will continue to result a gain in tourist arrivals.

Third, auto travel has grown steadily for the past three consecutive years, giving a boost to Florida's easily accessible tourist attractions. The *Travel Industry Indicators* (December, 1988) reported that auto travel in 1988 has increased 4.9% over the previous year.

As for the fourth quarter of 1988 the **Tourism Barometer II** estimates a 2.7% decrease in tourist arrivals compared to the previous year. The decline in tourist activity is mainly attributed to the general trend of slower air traffic in 1988 coupled with a traditional low volume in Florida tourism arrivals during the fourth quarter. Domestic air fares are up, and the average domestic ticket for the period ended in October, 1988 cost 7.6% more than the respective period of 1987. (*Travel Industry Indicators*, December 1988). Furthermore, The Airlines Reporting Corporation reported that the month of November 1988 broke a record of lowest sales in 1988. (*Travel Weekly*, December 29, 1988).

## OUT OF STATE VISITOR ARRIVALS QUARTERLY 1988.3 to 1989.2



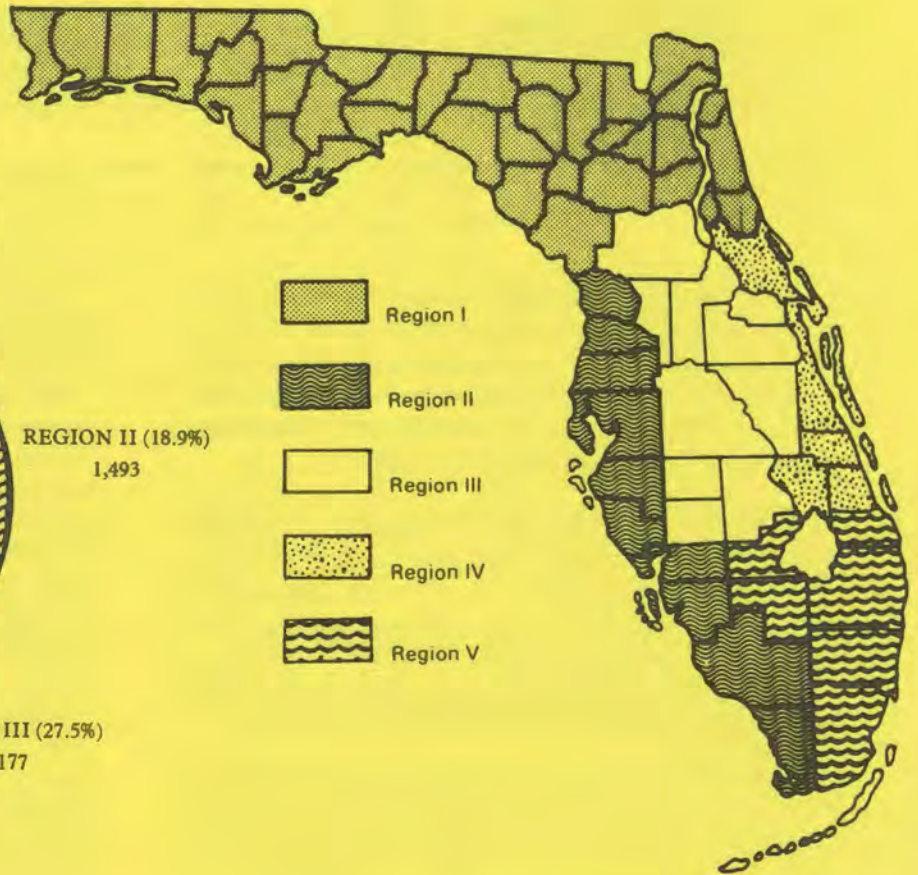
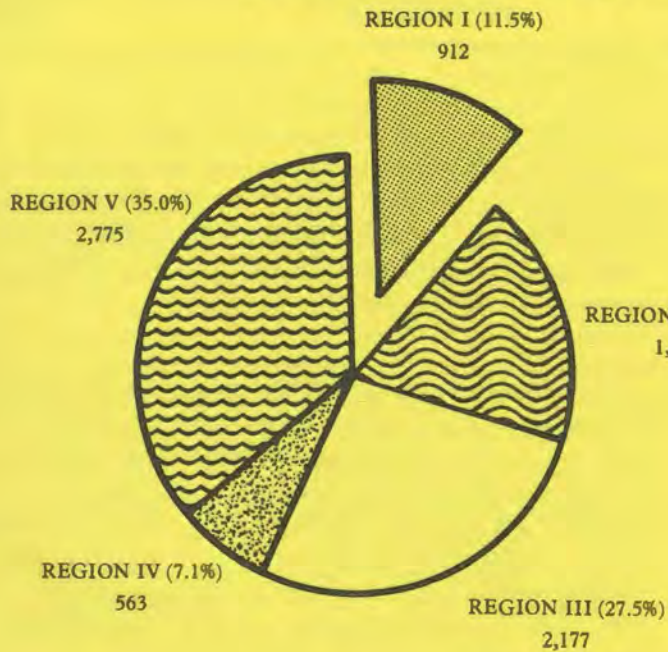
|       | (MILLIONS) |         |          |        |          |         |          |        |
|-------|------------|---------|----------|--------|----------|---------|----------|--------|
|       | 1988.3     | CH FR   | 1988.4   | CH FR  | 1989.1   | CH FR   | 1989.2   | CH FR  |
|       | ACTUAL     | PREV    | ESTIMATE | PREV   | FORECAST | PREV    | FORECAST | PREV   |
|       | YEAR       | YEAR    | YEAR     | YEAR   | YEAR     | YEAR    | YEAR     | YEAR   |
| AIR   | 3.766      | +9.30%  | 3.601    | -2.76% | 6.146    | +11.11% | 5.263    | +9.44% |
| AUTO  | 5.542      | +25.60% | 4.318    | +2.41% | 5.067    | +11.89% | 4.641    | +5.68% |
| TOTAL | 9.307      | +18.45% | 7.919    | -0.00% | 11.213   | +11.46% | 9.904    | +7.64% |

AIR - - - - - AUTO ..... TOTAL ———

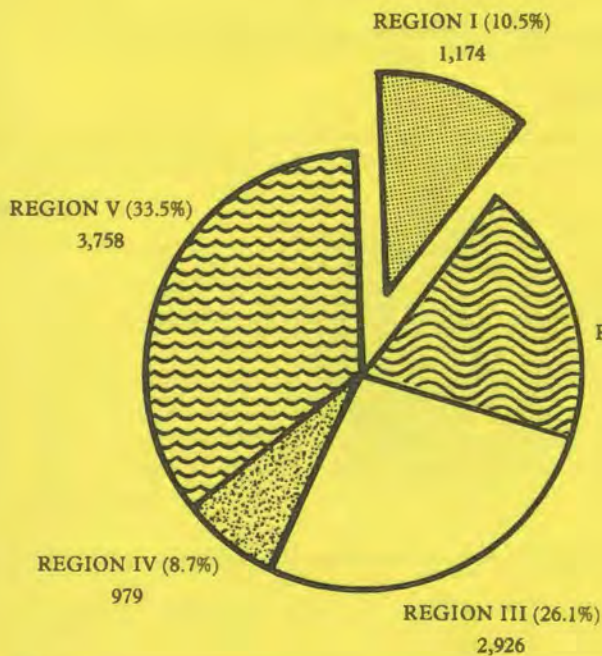


# Total Visitors Distribution

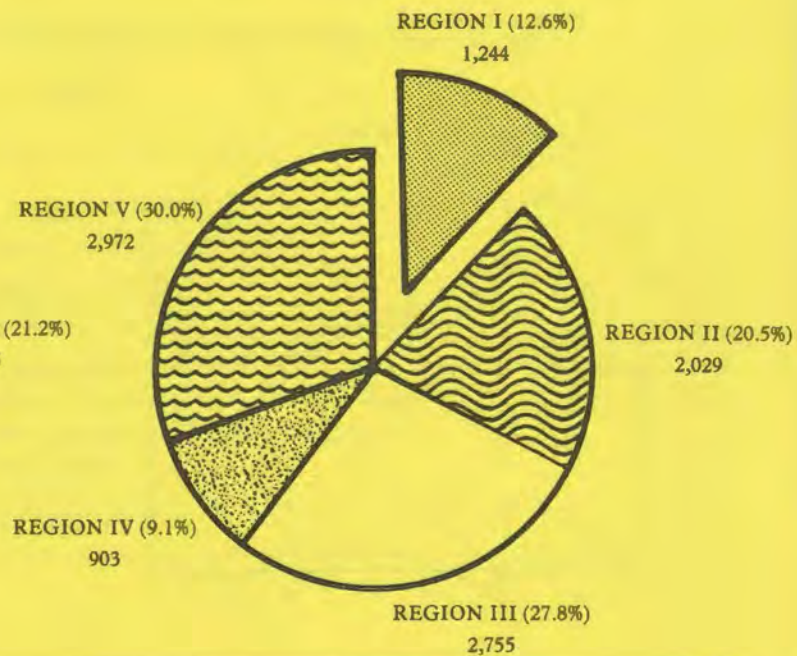
1988.4 ESTIMATE  
(THOUSANDS)



1989.1 FORECAST  
(THOUSANDS)

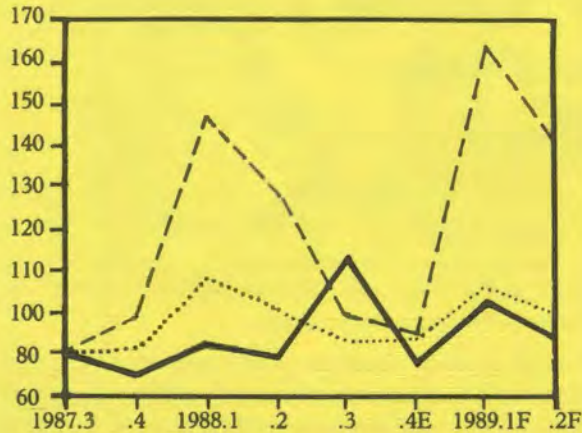


1989.2 FORECAST  
(THOUSANDS)





### Statewide Activity Index by Industry



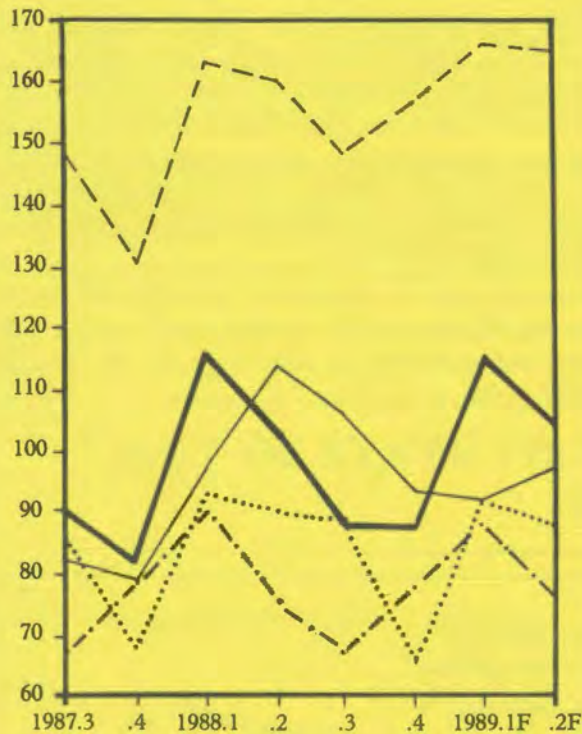
Air Visitors — — — — Hotel/Motel Occupancy ·····  
Auto Visitors —————

| Industry  | 1987.3 | .4 | 1988.1 | .2  | .3  | .4E | 1989.1F | .2F |
|-----------|--------|----|--------|-----|-----|-----|---------|-----|
| Air       | 92     | 99 | 147    | 128 | 100 | 96  | 164     | 140 |
| Auto      | 90     | 86 | 92     | 90  | 113 | 88  | 103     | 95  |
| Occupancy | 90     | 92 | 109    | 101 | 93  | 93  | 107     | 100 |

The air, auto and Occupancy indices are computed using a 1981.1 base. An "E" denotes an estimated value. An "F" denotes a forecasted number.

### Hotel/Motel Occupancy Index (1981.1 Base)

Region I ——— Region III — — — — Region V - · - · -  
Region II ——— Region IV ·····

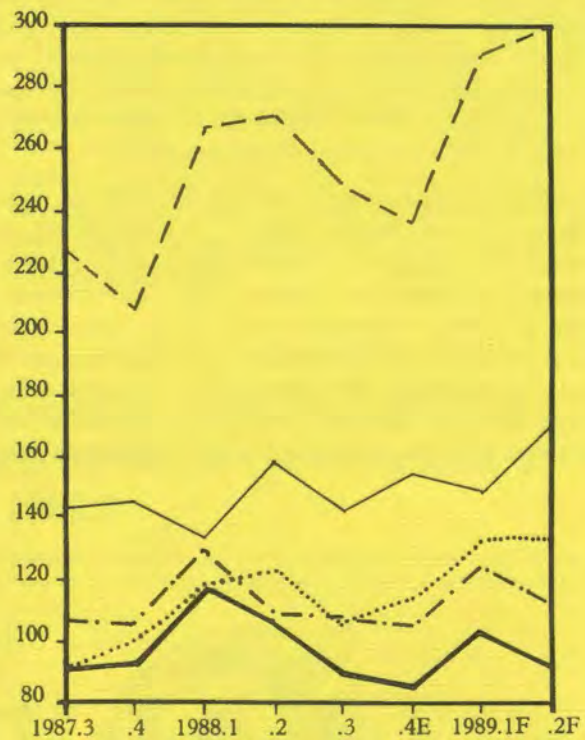


|            | 1987.3 | .4  | 1988.1 | .2  | .3  | .4  | 1989.1F | .2F |
|------------|--------|-----|--------|-----|-----|-----|---------|-----|
| Region I   | 82     | 79  | 97     | 113 | 107 | 93  | 91      | 97  |
| Region II  | 90     | 82  | 115    | 102 | 87  | 87  | 113     | 103 |
| Region III | 150    | 130 | 162    | 160 | 149 | 157 | 166     | 165 |
| Region IV  | 86     | 68  | 93     | 90  | 89  | 66  | 90      | 88  |
| Region V   | 68     | 78  | 91     | 75  | 69  | 78  | 88      | 75  |

An "E" denotes an estimated value.  
An "F" denotes a forecasted value.

### Airport Passenger Activity Index (1980.1 Base)

Region I ——— Region III — — — — Region V - · - · -  
Region II ——— Region IV ·····



|            | 1987.3 | .4  | 1988.1 | .2  | .3  | .4E | 1989.1F | .2F |
|------------|--------|-----|--------|-----|-----|-----|---------|-----|
| Region I   | 144    | 147 | 136    | 157 | 143 | 154 | 151     | 169 |
| Region II  | 91     | 93  | 115    | 106 | 90  | 87  | 103     | 95  |
| Region III | 227    | 209 | 265    | 270 | 249 | 237 | 291     | 300 |
| Region IV  | 91     | 99  | 118    | 122 | 106 | 114 | 133     | 134 |
| Region V   | 106    | 105 | 128    | 109 | 107 | 105 | 123     | 112 |

An "E" denotes an estimated value.  
An "F" denotes a forecasted value.



# Central Florida Residents' Visiting Patterns to Local Theme Parks

By: *Dr. Ady Milman, Research Director*  
*Dick Pope Sr. Institute for Tourism Studies*

Although one might assume that many leisure activities depend on available free time, this is not the case with Central Florida residents' visiting patterns to local theme parks. A recent study undertaken by the Dick Pope Sr. Institute for Tourism Studies revealed that there is no correlation between theme park visitation patterns and available leisure time of local residents.

The majority (65%) of the 300 Central Florida residents interviewed had previously visited at least one theme park. Local residents' annual theme park visits ranged between 1 and 50 times with an average of 5 visits a year. They usually spend about 8 hours in the park during each visit.

In addition, the findings revealed that there are no relationships between admission price consciousness and residents' frequency of visits to the local theme parks. In other words, the level of interest or likelihood to visit the local theme parks was not attributed to "price breaks," discounts or any other promotional campaigns.

In order to understand visiting patterns of local residents to local theme parks it is appropriate to investigate the perception of leisure among local residents. Theme park visitation is a "relationship" leisure activity. Almost all of the respondents went to the local theme parks as a social group like families, couples, or groups of friends. Considering the findings that in most cases children were very important in deciding whether or not to go to the local theme parks, it can be suggested that

parents fulfill their role relationships by taking their children to the local theme parks.

Central Florida residents who "consume" the local theme parks for their own enjoyment, self satisfaction, or educational experience are more likely to show an interest in, or to visit the local theme parks in the future. This free-choice leisure activity may be exercised in spite of budget and time constraints.

However, Central Florida residents who perceive theme park visits as an obligatory and quite unrewarding inherent experience (for example, taking out-of-town guests to the park) are less likely to go to the theme park in the future.

Note that although Central Florida residents have shown a great interest in local theme parks, and also have exhibited a high likelihood to visit them in the near future, they did not attend them as often as one might expect. This could be explained by the fact that a theme park is a very lengthy leisure activity, and local residents cannot "afford" to participate in them as frequently as they might in briefer leisure activities.

Research into the relationship among leisure, theme parks and tourism is still in its infancy and is part of many studies undertaken by the Dick Pope, Sr. for Tourism Studies in this area.



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