

## National Tour Association 2000 Fourth Quarter Results

### Member Response Rate:

	Overall		Tour Operators		DMOs		Tour Suppliers	
First Quarter 2000	915	25%	235	37%	253	32%	427	19%
Second Quarter 2000	934	26%	183	29%	277	36%	474	21%
Third Quarter 2000	672	20%	195	30%	188	24%	289	14%
Fourth Quarter 2000	882	24%	165	26%	246	31%	471	21%

**If you were to change the format of NTA's Convention business opportunities, which of the following would you prefer?**

	Tour Operators	DMOs	Tour Suppliers
Staying with the format of the pre-scheduled business opportunities	51%	73%	64%
Offering a straight trade show format	4%	2%	4%
Offering a combination trade show/business appointment format	44%	25%	30%
Other	1%	0%	2%

**Have you participated in any online training programs in the past six months?**

	Tour Operators	DMOs	Tour Suppliers
Yes	3%	3%	3%
No	97%	97%	97%

**Would you prefer to purchase audio recordings of NTA's Annual Convention and Spring Meet on cassette or CD?**

	Tour Operators	DMOs	Tour Suppliers
Cassette	43%	40%	33%
CD	57%	60%	67%

**Would you prefer to receive *Tuesday* newsletter via e-mail rather than by mail?**

	Tour Operators	DMOs	Tour Suppliers
Yes	50%	74%	65%
No	50%	26%	35%

Have you visited the enhanced NTA Online, which debuted August 31?

	Tour Operators		DMOs		Tour Suppliers	
	3 <sup>rd</sup>	4 <sup>th</sup>	3 <sup>rd</sup>	4 <sup>th</sup>	3 <sup>rd</sup>	4 <sup>th</sup>
Yes	27%	33%	52%	66%	46%	52%
No	73%	67%	48%	34%	54%	48%

How useful is the enhanced NTA Online?

	Tour Operators		DMOs		Tour Suppliers	
	3 <sup>rd</sup>	4 <sup>th</sup>	3 <sup>rd</sup>	4 <sup>th</sup>	3 <sup>rd</sup>	4 <sup>th</sup>
Very useful	*	*	56%	48%	37%	43%
Somewhat useful	*	*	41%	49%	54%	51%
Not very useful	*	*	3%	3%	9%	6%

\* *Not enough tour operators answered this question to make the results reliable.*

Please rate the usefulness of the following NTA publications with "1" being not at all useful and "10" being extremely useful:

	Tour Operators	DMOs	Tour Suppliers
Convention Delegate Registry	7.4	7.7	8.0
Convention Program	8.3	8.8	8.8
<i>Courier</i>	7.0	6.9	6.5
NTA Leadership Directory	6.5	6.2	6.3
Seminar Handbook	6.4	7.4	7.2
Tour Operator Spring Meet Handbook	6.9	N/A	N/A
NTA Tour Supplier/DMO Member Directory	9.2	8.5	8.4
NTA Tour Operator Directory	9.0	9.4	9.3
NTA Online Express	6.4	7.1	6.7
<i>Tuesday</i> Newsletter	7.2	6.9	6.6

Did you attend the 2000 NTA Annual Convention in Salt Lake City?

	Tour Operators	DMOs	Tour Suppliers
Yes	61%	90%	82%
No	39%	10%	18%

Did you read the Convention Daily Newsletter that was distributed each day of the Convention?

	Tour Operators	DMOs	Tour Suppliers
Yes	85%	58%	67%
No	15%	42%	33%

**Please rate the Convention Daily Newsletter:**

	<b>Tour Operators</b>	<b>DMOs</b>	<b>Tour Suppliers</b>
Average	7.4	7.0	7.2

**What would you like to see included in next year's Convention Daily?**

	<b>Tour Operators</b>	<b>DMOs</b>	<b>Tour Suppliers</b>
Corporate partner updates	42%	18%	24%
Photos and updates from recent convention events	43%	40%	43%
News on upcoming convention events	<b>79%</b>	68%	<b>74%</b>
Recaps from seminars	68%	61%	61%
Current industry news	71%	68%	68%
Announcements of giveaway winners	41%	35%	33%
NTA and industry research	62%	<b>70%</b>	55%
Results of the NTA board elections	67%	63%	48%
Other	0%	6%	4%

**Did you watch NTA TV?**

	<b>Tour Operators</b>		<b>DMOs</b>		<b>Tour Suppliers</b>	
	<b>1999</b>	<b>2000</b>	<b>1999</b>	<b>2000</b>	<b>1999</b>	<b>2000</b>
Yes, in the convention mall	N/A	8%	N/A	12%	N/A	17%
Yes, in my hotel room	N/A	37%	N/A	21%	N/A	23%
Yes - Total	39%	45%	35%	33%	36%	40%
No	61%	55%	65%	67%	64%	60%

**Did your organization contribute to charitable organizations during 2000?**

	<b>Tour Operators</b>	<b>DMOs</b>	<b>Tour Suppliers</b>
Yes	81%	49%	81%
No	19%	51%	19%

**TOUR OPERATORS ONLY**

**Does your company conduct tours in Washington, DC that include a tour of the US Capitol building?**

	<b>Tour Operators</b>
Yes	70%
No	30%

**If yes, will you utilize the extended hours for your groups?**

	<b>Tour Operators</b>
Yes	70%
No	30%

**Do you feel the Department of Transportation's proposed hours of service for motorcoach drivers (12 hours "on" and 10 consecutive hours "off") are feasible for tour operators?**

	<b>Tour Operators</b>
Yes	27%
No	73%

**Rank the top five governmental issues in order of their importance to your business.**

	<b>2000</b>	<b>1999</b>
Unfair Competition	#1	#1
ADA	#2	#4
Traveler Safety and Security	#3	#3
State/Provincial Travel Laws and Regulations	#4	#2
North American Border Crossing Issues	#5	#7
Local/Municipal Tourism Regulations	#6	#6
Federal Land Issues	#7	#5
Travel Industry Taxes and User Fees	#8	#6
Environmental Impact/Protection	#9	#8

**Importance of sub-topics within each governmental issue:**

**ADA**

	<b>Tour Operators</b>
Employment Issues	9%
Accommodation of ADA Travelers	100%
Other	0%

**Environmental Impact/Protection**

	<b>Tour Operators</b>
National Parks Preservation	48%
National Parks Transportation Issues	84%
Other	7%

### **Federal Lands Issues**

	<b>Tour Operators</b>
Tour Operator Access Issues	83%
Entrance Fees	88%
Preservation/Protection	20%
Other	0%

### **Local/Municipal Tourism Regulations**

	<b>Tour Operators</b>
Taxation	49%
Motorcoach Restrictions	94%
Other	5%

### **North American Border Crossing Issues**

	<b>Tour Operators</b>
U.S. – Canadian Border	96%
U.S. – Mexican Border	23%
NAFTA/Tax Issues	18%

### **State/Provincial Travel Laws and Regulations**

	<b>Tour Operators</b>
State Sellers of Travel Laws	88%
Tax Issues	47%
Provincial Travel Taxes	50%
Other	5%

### **Traveler Safety and Security**

	<b>Tour Operators</b>
DOT Regulations	96%
Terrorism	29%
Airline Safety	45%
Natural Disasters	40%
Other	3%

### Travel Industry Taxes and User Fees

	Tour Operators
NPS Fees	56%
Local Taxes	45%
Fuel Taxes	67%
Accommodation Taxes	76%
Other	3%

### Unfair Competition

	Tour Operators
Religious Groups	73%
State/Provincial Govts.	32%
Senior Citizens Group	81%
Federal Governments	24%
Educational Institutions	71%
Alumni Groups	49%
Local Governments	34%
Museums	34%
Other	9%

### Did you contact any elected government officials on policy issues?

	1999	2000
Yes, at the local level	17%	22%
Yes, at the state/provincial level	27%	27%
Yes, at the federal	29%	26%
No	59%	59%

### Did you contact these officials:

	1999	2000
In Person	32%	38%
In Writing	77%	73%
By Telephone	34%	47%
Via E-mail	26%	28%

### Top three selling destinations during 2000 (overall):

	Tour Operators
New York City	#1
Washington, DC	#2
Branson	#3

**Top three selling United States destinations during 2000:**

	<b>Tour Operators</b>
New York City	#1
Branson	#2
Washington, DC	#3

**Top five selling Canadian destinations during 2000:**

	<b>Tour Operators</b>
Toronto	#1
Niagara Falls	#2
Nova Scotia	#3
Montreal	#4
Quebec	#5

**STATISTICAL INFORMATION**

**How many years have you worked in the travel industry?**

	<b>Tour Operators</b>	<b>DMOs</b>	<b>Suppliers</b>
Average	20	12	13

**Are you a:**

	<b>Tour Operators</b>	<b>DMOs</b>	<b>Suppliers</b>
U.S. member	88%	88%	81%
Canadian member	12%	12%	19%

**Size of company:**

	<b>Tour Operators</b>
Annual sales less than \$1 million	31%
Annual sales \$1million to \$3 million	35%
Annual sales \$3 million to \$5 million	13%
Annual sales \$5 million to \$7 million	9%
Annual sales more than \$7 million	12%

**Gender**

	<b>Tour Operators</b>	<b>DMOs</b>	<b>Suppliers</b>
Female	51%	79%	74%
Male	49%	21%	26%

**AGE - table 1**

	<b>Tour Operators</b>	<b>DMOs</b>	<b>Suppliers</b>
20-24	0%	2%	3%
25-29	1%	10%	13%
30-34	4%	17%	16%
35-39	7%	12%	14%
40-44	8%	17%	14%
45-49	16%	14%	13%
50-54	17%	14%	12%
55-59	22%	10%	9%
60-64	16%	4%	4%
65 or older	9%	1%	2%

**AGE - table 2**

	<b>Tour Operators</b>	<b>DMOs</b>	<b>Suppliers</b>
20-49	36%	71%	73%
50-64	55%	28%	25%
65 or older	9%	1%	2%

*Sums may not total 100% due to rounding.*