

National Tour Association 2001 First Quarter Results

Member Response Rate:

	Overall		Tour Operators		DMOs		Tour Suppliers	
First Quarter 2000	721	22%	180	29%	222	28%	319	15%

Please rank from 1 to 4 how you would prefer to receive communication:

	Tour Operators		DMOs		Tour Suppliers	
	NTA	Day to Day	NTA	Day to Day	NTA	Day to Day
Phone	#4	#1	#4	#2	#4	#1
Fax	#2	#2	#3	#3	#3	#3
E-mail	#3	#3	#1	#1	#2	#2
Regular mail	#1	#4	#2	#4	#1	#4

Have you visited the National Tourism Foundation's new Web site?

	Tour Operators	DMOs	Tour Suppliers
Yes	22%	55%	47%
No	78%	45%	53%

Which areas of the Web site did you visit?

	Tour Operators	DMOs	Tour Suppliers
About NTF	*	30%	32%
Career Links	*	12%	8%
Hall of Fame	*	7%	4%
Industry Links	*	44%	47%
News	*	54%	56%
NTF Online Auction	*	16%	16%
Research and Resources	*	74%	60%
Scholarships	*	4%	4%
Special Events	*	43%	41%

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

How useful is NTF Online?

	Tour Operators	DMOs	Tour Suppliers
Very useful	*	38%	38%
Somewhat useful	*	53%	53%
Not very useful	*	9%	9%

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

How do you use online auctions?

	Tour Operators	DMOs	Tour Suppliers
Buy items	13%	3%	6%
Sell items	3%	1%	5%
Do not use online auctions	84%	96%	89%

How often do you buy or sell items on online auctions?

	Tour Operators	DMOs	Tour Suppliers
Daily	*	*	*
Weekly	*	*	*
Monthly	*	*	*
Yearly	*	*	*
Other	*	*	*

* *Not enough members answered this question to make the results reliable.*

How useful is the NTA Tour Supplier/DMO Member Directory?

	Tour Operators	DMOs	Tour Suppliers
Extremely useful	36%	33%	36%
Very useful	35%	36%	36%
Somewhat useful	24%	27%	23%
Not very useful	2%	1%	1%
Not at all useful	1%	0%	1%
Do not use	2%	3%	3%

Do you read Courier magazine?

	Tour Operators	DMOs	Tour Suppliers
Yes	93%	93%	86%
No	7%	7%	13%

If NTA could provide you with additional time during the Annual Convention for educational opportunities, in which of the following would you participate?

	Tour Operators	DMOs	Tour Suppliers
One full day added to the front end of convention for an additional fee	33%	30%	28%
One full day added to the end of convention for an additional fee	6%	6%	8%
Evening seminars	25%	12%	22%
None of the above	36%	52%	42%

How does your budget run?

	DMOs	Tour Suppliers
Calendar year	40%	68%
Fiscal year	60%	28%
Other	0%	4%

Which of the following months does your budget run?

	DMOs	Tour Suppliers
July 1 to June 30	71%	29%
September 1 to August 31	6%	23%
Other	23%	48%

For each of the following member services, please indicate the importance of the service to you and the overall quality of service:

Tour Operator Directory: Importance

	Overall	Tour Operators	DMOs	Tour Suppliers
Very Important	74%	54%	82%	79%
Somewhat Important	19%	31%	16%	14%
Average	6%	12%	2%	6%
Somewhat Unimportant	1%	3%	*	1%
Totally Unimportant	0%	0%	0%	0%

* = less than 1%

Tour Operator Directory: Quality

	Overall	Tour Operators	DMOs	Tour Suppliers
Excellent	41%	43%	37%	44%
Above Average	45%	41%	52%	43%
Average	13%	16%	11%	13%
Below Average	1%	*	0%	*
Poor	*	0%	0%	*

* = less than 1%

Tour Supplier/DMO Member Directory: Importance

	Overall	Tour Operators	DMOs	Tour Suppliers
Very Important	47%	63%	38%	44%
Somewhat Important	31%	26%	35%	32%
Average	14%	8%	17%	16%
Somewhat Unimportant	5%	2%	8%	6%
Totally Unimportant	3%	1%	1%	2%

Tour Supplier/DMO Member Directory: Quality

	Overall	Tour Operators	DMOs	Tour Suppliers
Excellent	38%	46%	31%	38%
Above Average	45%	38%	53%	43%
Average	17%	16%	16%	18%
Below Average	*	*	0%	1%
Poor	*	0%	*	0%

* = less than 1%

Profile Forms: Importance

	Overall	Tour Operators	DMOs	Tour Suppliers
Very Important	60%	32%	69%	67%
Somewhat Important	22%	28%	22%	20%
Average	13%	28%	7%	9%
Somewhat Unimportant	3%	5%	1%	3%
Totally Unimportant	2%	7%	1%	1%

* = less than 1%

Profile Forms: Quality

	Overall	Tour Operators	DMOs	Tour Suppliers
Excellent	26%	28%	21%	29%
Above Average	38%	35%	37%	34%
Average	30%	34%	30%	28%
Below Average	3%	1%	8%	6%
Poor	3%	2%	4%	3%

CTP: Importance

	Overall	Tour Operators	DMOs	Tour Suppliers
Very Important	20%	17%	26%	19%
Somewhat Important	31%	27%	31%	32%
Average	26%	23%	26%	28%
Somewhat Unimportant	14%	19%	11%	12%
Totally Unimportant	9%	14%	6%	9%

CTP: Quality

	Overall	Tour Operators	DMOs	Tour Suppliers
Excellent	28%	21%	31%	30%
Above Average	38%	39%	38%	37%
Average	30%	36%	23%	30%
Below Average	3%	2%	6%	3%
Poor	1%	2%	2%	0%

Audio/Video tapes and materials: Importance

	Overall	Tour Operators	DMOs	Tour Suppliers
Very Important	13%	13%	14%	11%
Somewhat Important	26%	26%	25%	24%
Average	38%	41%	34%	38%
Somewhat Unimportant	13%	13%	19%	17%
Totally Unimportant	10%	7%	8%	10%

Audio/Video tapes and materials: Quality

	Overall	Tour Operators	DMOs	Tour Suppliers
Excellent	13%	6%	16%	16%
Above Average	35%	30%	46%	31%
Average	47%	57%	34%	48%
Below Average	5%	7%	3%	4%
Poor	*	0%	1%	1%

* = less than 1%

Seminars and Educational Opportunities: Importance

	Overall	Tour Operators	DMOs	Tour Suppliers
Very Important	47%	41%	55%	44%
Somewhat Important	34%	34%	32%	36%
Average	16%	21%	11%	17%
Somewhat Unimportant	3%	3%	2%	3%
Totally Unimportant	*	1%	0%	*

* = less than 1%

Seminars and Educational Opportunities: Quality

	Overall	Tour Operators	DMOs	Tour Suppliers
Excellent	25%	17%	30%	25%
Above Average	46%	45%	45%	48%
Average	25%	34%	22%	23%
Below Average	3%	2%	3%	2%
Poor	1%	2%	0%	2%

Annual Convention: Importance

	Overall	Tour Operators	DMOs	Tour Suppliers
Very Important	77%	64%	87%	77%
Somewhat Important	16%	24%	10%	16%
Average	5%	9%	2%	5%
Somewhat Unimportant	1%	2%	1%	1%
Totally Unimportant	1%	1%	0%	1%

Annual Convention: Quality

	Overall	Tour Operators	DMOs	Tour Suppliers
Excellent	55%	48%	60%	56%
Above Average	35%	44%	32%	33%
Average	9%	8%	8%	10%
Below Average	1%	0%	0%	1%
Poor	*	0%	0%	*

* = less than 1%

Tour Operator Spring Meet: Importance

	Overall	Tour Operators	DMOs	Tour Suppliers
Very Important	26%	35%	27%	19%
Somewhat Important	28%	34%	27%	23%
Average	20%	13%	22%	23%
Somewhat Unimportant	14%	13%	12%	16%
Totally Unimportant	12%	5%	12%	19%

Tour Operator Spring Meet: Quality

	Overall	Tour Operators	DMOs	Tour Suppliers
Excellent	29%	28%	39%	25%
Above Average	38%	46%	33%	32%
Average	26%	22%	22%	32%
Below Average	5%	4%	6%	5%
Poor	2%	0%	0%	6%

Member Roundtables: Importance

	Overall	Tour Operators	DMOs	Tour Suppliers
Very Important	24%	26%	24%	23%
Somewhat Important	32%	30%	35%	30%
Average	28%	30%	23%	32%
Somewhat Unimportant	10%	9%	12%	8%
Totally Unimportant	6%	5%	6%	7%

Member Roundtables: Quality

	Overall	Tour Operators	DMOs	Tour Suppliers
Excellent	20%	20%	16%	23%
Above Average	36%	34%	37%	37%
Average	37%	40%	37%	35%
Below Average	5%	5%	8%	2%
Poor	2%	1%	2%	3%

Networking Opportunities: Importance

	Overall	Tour Operators	DMOs	Tour Suppliers
Very Important	63%	51%	66%	69%
Somewhat Important	23%	29%	23%	19%
Average	11%	15%	9%	10%
Somewhat Unimportant	2%	4%	2%	1%
Totally Unimportant	1%	1%	0%	2%

Networking Opportunities: Quality

	Overall	Tour Operators	DMOs	Tour Suppliers
Excellent	33%	27%	32%	37%
Above Average	38%	41%	41%	35%
Average	24%	25%	25%	23%
Below Average	4%	6%	3%	4%
Poor	1%	1%	0%	1%

Tour & Travel Exchange Appointments: Importance

	Overall	Tour Operators	DMOs	Tour Suppliers
Very Important	78%	60%	89%	81%
Somewhat Important	14%	23%	8%	12%
Average	7%	15%	3%	5%
Somewhat Unimportant	1%	1%	0%	1%
Totally Unimportant	*	1%	0%	1%

* = less than 1%

Tour & Travel Exchange Appointments: Quality

	Overall	Tour Operators	DMOs	Tour Suppliers
Excellent	49%	41%	52%	50%
Above Average	34%	39%	31%	34%
Average	14%	18%	12%	14%
Below Average	2%	1%	4%	2%
Poor	1%	1%	1%	*

* = less than 1%

Government Relations: Importance

	Overall	Tour Operators	DMOs	Tour Suppliers
Very Important	30%	40%	33%	22%
Somewhat Important	34%	35%	31%	35%
Average	27%	20%	31%	29%
Somewhat Unimportant	6%	4%	3%	9%
Totally Unimportant	3%	1%	2%	5%

Government Relations: Quality

	Overall	Tour Operators	DMOs	Tour Suppliers
Excellent	27%	34%	26%	24%
Above Average	37%	36%	38%	36%
Average	31%	24%	34%	35%
Below Average	3%	5%	1%	3%
Poor	2%	1%	1%	2%

Publications: Importance

	Overall	Tour Operators	DMOs	Tour Suppliers
Very Important	26%	29%	30%	22%
Somewhat Important	43%	48%	42%	40%
Average	26%	18%	26%	31%
Somewhat Unimportant	4%	4%	1%	5%
Totally Unimportant	1%	1%	1%	2%

Publications: Quality

	Overall	Tour Operators	DMOs	Tour Suppliers
Excellent	28%	29%	30%	27%
Above Average	43%	38%	48%	41%
Average	27%	25%	22%	32%
Below Average	2%	6%	*	*
Poor	*	1%	0%	0%

* = less than 1%

Corporate Partners/Benefit Providers: Importance

	Overall	Tour Operators	DMOs	Tour Suppliers
Very Important	16%	24%	9%	15%
Somewhat Important	24%	33%	25%	18%
Average	35%	29%	36%	37%
Somewhat Unimportant	14%	10%	18%	15%
Totally Unimportant	11%	4%	12%	14%

Corporate Partners/Benefit Providers: Quality

	Overall	Tour Operators	DMOs	Tour Suppliers
Excellent	14%	16%	10%	16%
Above Average	32%	38%	33%	25%
Average	43%	34%	43%	51%
Below Average	8%	10%	8%	6%
Poor	3%	2%	6%	2%

NTA Online: Importance

	Overall	Tour Operators	DMOs	Tour Suppliers
Very Important	38%	20%	49%	41%
Somewhat Important	36%	34%	34%	38%
Average	19%	33%	13%	16%
Somewhat Unimportant	5%	9%	3%	5%
Totally Unimportant	2%	4%	1%	0%

NTA Online: Quality

	Overall	Tour Operators	DMOs	Tour Suppliers
Excellent	24%	15%	28%	26%
Above Average	43%	36%	47%	43%
Average	27%	37%	22%	26%
Below Average	4%	7%	2%	4%
Poor	2%	5%	1%	1%

Consumer Protection Plan: Importance

	Overall	Tour Operators	DMOs	Tour Suppliers
Very Important	53%	73%	35%	42%
Somewhat Important	22%	17%	29%	23%
Average	14%	7%	20%	19%
Somewhat Unimportant	5%	1%	10%	7%
Totally Unimportant	6%	2%	6%	9%

Consumer Protection Plan: Quality

	Overall	Tour Operators	DMOs	Tour Suppliers
Excellent	43%	60%	23%	30%
Above Average	35%	31%	42%	39%
Average	20%	9%	33%	28%
Below Average	2%	1%	2%	3%
Poor	0%	0%	0%	0%

Efforts to enhance the image of the packaged travel industry: Importance

	Overall	Tour Operators	DMOs	Tour Suppliers
Very Important	58%	61%	60%	54%
Somewhat Important	28%	27%	28%	30%
Average	11%	10%	10%	13%
Somewhat Unimportant	2%	2%	2%	1%
Totally Unimportant	1%	0%	0%	2%

Efforts to enhance the image of the packaged travel industry: Quality

	Overall	Tour Operators	DMOs	Tour Suppliers
Excellent	24%	32%	20%	23%
Above Average	45%	34%	52%	46%
Average	27%	27%	26%	27%
Below Average	3%	4%	2%	3%
Poor	1%	3%	0%	1%

Research on changing marketplace conditions and trends: Importance

	Overall	Tour Operators	DMOs	Tour Suppliers
Very Important	55%	44%	69%	52%
Somewhat Important	30%	34%	24%	33%
Average	12%	17%	7%	12%
Somewhat Unimportant	2%	5%	0%	2%
Totally Unimportant	1%	0%	*	1%

* = less than 1%

Research on changing marketplace conditions and trends: Quality

	Overall	Tour Operators	DMOs	Tour Suppliers
Excellent	23%	23%	24%	23%
Above Average	46%	43%	47%	46%
Average	28%	28%	28%	29%
Below Average	2%	4%	1%	2%
Poor	1%	2%	0%	*

* = less than 1%

Media relations: Importance

	Overall	Tour Operators	DMOs	Tour Suppliers
Very Important	38%	32%	47%	36%
Somewhat Important	33%	34%	32%	33%
Average	24%	26%	19%	27%
Somewhat Unimportant	3%	7%	2%	1%
Totally Unimportant	2%	1%	0%	3%

Media relations: Quality

	Overall	Tour Operators	DMOs	Tour Suppliers
Excellent	20%	22%	17%	21%
Above Average	40%	29%	48%	40%
Average	37%	42%	33%	36%
Below Average	3%	5%	1%	3%
Poor	*	1%	1%	*

* = less than 1%

Marketing Assistance Programs – Travel Agents: Importance

	Tour Operators
Very Important	25%
Somewhat Important	26%
Average	26%
Somewhat Unimportant	12%
Totally Unimportant	11%

Marketing Assistance Programs – Travel Agents: Quality

	Tour Operators
Excellent	11%
Above Average	19%
Average	55%
Below Average	10%
Poor	5%

Marketing Assistance Programs – Group Leaders: Importance

	Tour Operators
Very Important	32%
Somewhat Important	30%
Average	23%
Somewhat Unimportant	6%
Totally Unimportant	9%

Marketing Assistance Programs – Group Leaders: Quality

	Tour Operators
Excellent	12%
Above Average	24%
Average	47%
Below Average	8%
Poor	9%

Marketing Assistance Programs – Student/Youth Groups: Importance

	Tour Operators
Very Important	22%
Somewhat Important	22%
Average	22%
Somewhat Unimportant	14%
Totally Unimportant	20%

Marketing Assistance Programs – Student/Youth Groups: Quality

	Tour Operators
Excellent	7%
Above Average	19%
Average	53%
Below Average	11%
Poor	10%

Marketing Assistance Programs – International Markets: Importance

	Tour Operators
Very Important	26%
Somewhat Important	20%
Average	24%
Somewhat Unimportant	10%
Totally Unimportant	10%

Marketing Assistance Programs – International Markets: Quality

	Tour Operators
Excellent	9%
Above Average	22%
Average	45%
Below Average	11%
Poor	13%

Please indicate how much you agree or disagree with the following statements:

I am familiar with the variety of services NTA provides.

	Overall	Tour Operators	DMOs	Tour Suppliers
Strongly Agree	35%	40%	38%	31%
Somewhat Agree	58%	54%	55%	62%
Neither	4%	4%	5%	3%
Somewhat Disagree	3%	1%	2%	4%
Strongly Disagree	*	1%	*	*

** = less than 1%*

NTA's staff is helpful and knowledgeable.

	Overall	Tour Operators	DMOs	Tour Suppliers
Strongly Agree	60%	57%	65%	58%
Somewhat Agree	34%	36%	30%	36%
Neither	4%	4%	3%	5%
Somewhat Disagree	1%	2%	1%	1%
Strongly Disagree	1%	1%	1%	0%

NTA's staff is responsive.

	Overall	Tour Operators	DMOs	Tour Suppliers
Strongly Agree	61%	58%	63%	60%
Somewhat Agree	33%	34%	31%	34%
Neither	4%	4%	4%	5%
Somewhat Disagree	1%	3%	1%	1%
Strongly Disagree	1%	1%	1%	0%

NTA is currently focusing enough attention on technology issues such as online travel sales, marketing and promotion.

	Overall	Tour Operators	DMOs	Tour Suppliers
Strongly Agree	36%	34%	38%	34%
Somewhat Agree	48%	50%	48%	48%
Neither	11%	9%	9%	14%
Somewhat Disagree	4%	6%	4%	4%
Strongly Disagree	1%	1%	1%	*

* = less than 1%

NTA is responsive to the changing trends in the industry.

	Overall	Tour Operators	DMOs	Tour Suppliers
Strongly Agree	42%	38%	48%	40%
Somewhat Agree	48%	52%	44%	48%
Neither	7%	5%	5%	9%
Somewhat Disagree	3%	4%	3%	2%
Strongly Disagree	*	1%	0%	1%

NTA is focusing enough attention on identifying new and emerging markets and customers for its members.

	Overall	Tour Operators	DMOs	Tour Suppliers
Strongly Agree	34%	32%	34%	34%
Somewhat Agree	49%	53%	50%	46%
Neither	11%	9%	8%	15%
Somewhat Disagree	5%	5%	7%	4%
Strongly Disagree	1%	1%	1%	1%

NTA should focus attention on cultivating international members.

	Overall	Tour Operators	DMOs	Tour Suppliers
Strongly Agree	21%	19%	15%	26%
Somewhat Agree	40%	40%	36%	43%
Neither	21%	28%	23%	15%
Somewhat Disagree	12%	10%	16%	11%
Strongly Disagree	6%	3%	10%	5%

NTA should focus attention on cultivating current member opportunities in the international market.

	Overall	Tour Operators	DMOs	Tour Suppliers
Strongly Agree	28%	29%	23%	31%
Somewhat Agree	39%	42%	34%	42%
Neither	18%	20%	22%	15%
Somewhat Disagree	9%	8%	12%	8%
Strongly Disagree	6%	1%	9%	4%

It is appropriate for NTA to place a priority focus on tour operators.

	Overall	Tour Operators	DMOs	Tour Suppliers
Strongly Agree	42%	75%	28%	33%
Somewhat Agree	35%	17%	43%	39%
Neither	11%	6%	11%	13%
Somewhat Disagree	10%	1%	15%	12%
Strongly Disagree	2%	1%	3%	3%

NTA has been successful in recruiting new members.

	Overall	Tour Operators	DMOs	Tour Suppliers
Strongly Agree	19%	20%	18%	20%
Somewhat Agree	48%	50%	49%	45%
Neither	27%	25%	26%	28%
Somewhat Disagree	5%	4%	5%	6%
Strongly Disagree	1%	1%	2%	1%

NTA has consistently met my expectations since I became a member.

	Overall	Tour Operators	DMOs	Tour Suppliers
Strongly Agree	36%	41%	36%	34%
Somewhat Agree	43%	40%	45%	44%
Neither	14%	12%	14%	16%
Somewhat Disagree	5%	5%	5%	5%
Strongly Disagree	2%	2%	*	1%

** = less than 1%*

NTA Board of Directors effectively represents the interests of my organization.

	Overall	Tour Operators	DMOs	Tour Suppliers
Strongly Agree	23%	26%	20%	25%
Somewhat Agree	45%	40%	52%	42%
Neither	24%	23%	21%	27%
Somewhat Disagree	7%	10%	6%	5%
Strongly Disagree	1%	1%	1%	1%

NTA provides me with plenty of opportunities to participate in committees, task forces, and other volunteer opportunities.

	Overall	Tour Operators	DMOs	Tour Suppliers
Strongly Agree	34%	39%	32%	34%
Somewhat Agree	41%	34%	46%	40%
Neither	17%	22%	14%	16%
Somewhat Disagree	6%	3%	5%	8%
Strongly Disagree	2%	2%	3%	2%

The organizational structure of NTA's Board of Directors is effective.

	Overall	Tour Operators	DMOs	Tour Suppliers
Strongly Agree	27%	28%	27%	27%
Somewhat Agree	42%	43%	47%	38%
Neither	24%	20%	21%	30%
Somewhat Disagree	5%	8%	4%	4%
Strongly Disagree	2%	1%	1%	1%

Rate the overall value of your NTA membership:

	Tour Operators	DMOs	Tour Suppliers
2001 – First Quarter Survey	7.8	8.3	8.1
2000 – First Quarter Survey	8.4	8.3	8.0
1999 – First Quarter Survey	8.1	8.2	7.9
1998 – First Quarter Survey	8.4	8.7	8.4
1997 – Third Quarter Survey	8.4	7.9	7.9

TOUR OPERATORS ONLY

Quarterly Business Update- First Quarter 2001

	Greater Than 2000	Less Than 2000	Same As 2000
Number of passengers	34%	39%	27%
Number of departures	29%	34%	37%
Gross revenue	40%	39%	21%

Which of the following describes your business?

	Tour Operators
Escorted group tours	93%
One-day sightseeing tours	62%
Receptive services to other tour operators	53%
Independent packages (FITs)	34%
Sightseeing tours as a component of conferences/conventions	39%
Independent charter services	20%
Meeting planning	23%

Are you familiar with the concept of permission marketing?

	Tour Operators
Yes	15%
No	85%

Did you participate in the United Airlines transportation provider program during 2000?

	Tour Operators
Yes	39%
No	61%

Would you like your e-mail address to be added to a list of other tour operators that would be made available to all NTA members?

	Tour Operators
Yes	64%
No	36%

STATISTICAL INFORMATION

How many years have you worked in the travel industry?

	Tour Operators	DMOs	Suppliers
Average	19	12	13

Are you a:

	Tour Operators	DMOs	Suppliers
U.S. member	92%	91%	90%
Canadian member	8%	9%	10%

Size of company:

	Tour Operators
Annual sales less than \$1 million	26%
Annual sales \$1 million to \$3 million	44%
Annual sales \$3 million to \$5 million	14%
Annual sales \$5 million to \$7 million	8%
Annual sales more than \$7 million	8%

Gender

	Tour Operators	DMOs	Suppliers
Female	59%	78%	73%
Male	41%	22%	27%

AGE - table 1

	Tour Operators	DMOs	Suppliers
20-24	1%	3%	3%
25-29	2%	10%	13%
30-34	7%	13%	17%
35-39	6%	13%	11%
40-44	10%	15%	16%
45-49	16%	15%	13%
50-54	20%	16%	13%
55-59	14%	8%	6%
60-64	14%	6%	6%
65 or older	10%	1%	2%

AGE - table 2

	Tour Operators	DMOs	Suppliers
20-49	42%	69%	73%
50-64	48%	30%	25%
65 or older	10%	1%	2%

Sums may not total 100% due to rounding.