

## National Tour Association 2001 Second Quarter Results

### Member Response Rate:

	Overall		Tour Operators		DMOs		Tour Suppliers	
First Quarter 2001	721	22%	180	29%	222	28%	319	15%
Second Quarter 2001	598	17%	150	24%	161	21%	287	13%

### Which of the following Industry Reports, available on NTA Online, have you read?

	Tour Operators	DMOs	Tour Suppliers
Succession Planning	9%	3%	6%
E-Business Guide	9%	5%	8%
Doing Business in the Global Marketplace	11%	9%	12%
Crisis Management	12%	4%	6%
Business Plan Resource Guide	9%	5%	7%
ADA	11%	2%	6%
External Volatilities	2%	1%	2%
Y2K	4%	1%	4%
Consolidation	5%	2%	2%
Technology 101	2%	3%	3%
I have not read any	69%	85%	76%

### Does your company/organization have a Web site?

	Tour Operators	DMOs	Tour Suppliers
Yes	64%	99%	95%
No	36%	1%	5%

### Are you satisfied with your current provider?

	Tour Operators	DMOs	Tour Suppliers
Yes	91%	92%	95%
No	9%	8%	5%

### How much does your company pay annually for each of the following?

	Tour Operators	DMOs	Tour Suppliers
Design	\$789	\$1,621	\$1,441
Hosting	\$862	\$789	\$908
Maintenance	\$512	\$1,029	\$625

**How much would you be willing to pay to upgrade your existing Web site?**

	<b>Tour Operators</b>	<b>DMOs</b>	<b>Tour Suppliers</b>
Less than \$1,000	28%	13%	21%
\$1,001 to \$2,000	12%	7%	12%
\$2,001 to \$4,000	9%	7%	4%
\$4,001 to \$6,000	1%	5%	3%
\$6,001 to \$8,000	0%	3%	1%
\$8,001 to \$10,000	1%	8%	2%
More than \$10,000	2%	8%	3%
I do not wish to upgrade	46%	49%	55%

**Does your Web site have the ability to book tours online?**

	<b>Tour Operators</b>
Yes	28%
No	72%

**Would you be interested in a program that would assist you in booking tours online?**

	<b>Tour Operators</b>
Yes	47%
No	53%

**Can a tour operator currently go to your Web site and book your product through your Web site?**

	<b>Tour Suppliers</b>
Yes	38%
No	62%

**Does your company offer credit card processing from your Web site?**

	<b>Tour Operators</b>	<b>DMOs</b>	<b>Tour Suppliers</b>
Yes	16%	8%	34%
No	84%	92%	66%

**Do you read the National Tourism Foundation's quarterly newsletter *Headlines*?**

	<b>Tour Operators</b>	<b>DMOs</b>	<b>Tour Suppliers</b>
Yes	67%	83%	75%
No	33%	17%	25%

**How useful in the information contained in *Headlines*?**

	<b>Tour Operators</b>	<b>DMOs</b>	<b>Tour Suppliers</b>
Very useful	8%	19%	18%
Somewhat useful	76%	73%	72%
Not very useful	16%	8%	10%

**Which of the following statements best describes your company?**

	<b>Tour Operators</b>
Domestic Only	37%
Domestic and International Inbound	9%
Domestic and International Outbound	39%
Domestic and both International Inbound and Outbound	13%
International Inbound only	1%
International Outbound only	2%

**Percentage of your company's international inbound business that is in the form of:**

	<b>Tour Operators</b>
<b>Number of Respondents</b>	<b>32</b>
Group Tours	82%
Independent Packages	18%

**What percentage of your international inbound groups tours does your company:**

	<b>Tour Operators</b>
<b>Number of respondents</b>	<b>31</b>
Package yourself	92%
Purchase from another NTA tour operator	4%
Purchase from on non-NTA tour operator	4%

**What percentage of your international inbound independent packages does your company?**

	<b>Tour Operators</b>
<b>Number of respondents</b>	<b>18</b>
Package yourself	93%
Purchase from another NTA tour operator	4%
Purchase from on non-NTA tour operator	3%

**Estimate the number of international inbound travelers your company served during 2000:**

	<b>Tour Operators</b>
<b>Number of respondents</b>	<b>29</b>
Average	1,164

During the past year has your international inbound business:

	Tour Operators
<b>Number of respondents</b>	<b>32</b>
Increased	34%
Decreased	31%
Stayed the same	35%

How many years have you been offering international inbound travel products?

	Tour Operators
<b>Number of respondents</b>	<b>33</b>
Average	10 years

From which of the following countries do you receive international inbound business?

	Tour Operators	DMOs	Tour Suppliers
<b>Number of respondents</b>	<b>27</b>	<b>135</b>	<b>238</b>
Argentina	10%	24%	19%
Australia	41%	43%	47%
Austria	31%	27%	20%
Brazil	10%	35%	28%
Chile	3%	17%	12%
China	7%	29%	31%
France	41%	54%	56%
Germany	<b>76%</b>	<b>93%</b>	<b>84%</b>
Ireland	7%	39%	27%
Israel	7%	17%	15%
Italy	17%	37%	33%
Japan	45%	70%	59%
Korea	0%	22%	21%
Netherlands	28%	35%	31%
New Zealand	21%	23%	24%
Spain	10%	24%	24%
Switzerland	21%	37%	27%
Taiwan	7%	21%	21%
United Kingdom	72%	89%	80%
Venezuela	0%	15%	12%
Other	10%	7%	8%

Is your company looking for additional business-to-business buying/selling opportunities for international inbound business?

	Tour Operators
<b>Number of respondents</b>	<b>30</b>
Yes	83%
No	17%

**Where would you like to see additional business opportunities?**

	<b>Tour Operators</b>
<b>Number of respondents</b>	<b>24</b>
NTA Annual Convention	58%
NTA Tour Operator Spring Meet	50%
An additional (new) international event	42%

**Percentage of your company's international outbound business that is in the form of:**

	<b>Tour Operators</b>
<b>Number of respondents</b>	<b>79</b>
Group Tours	78%
Independent Packages	22%

**What percentage of your international outbound groups tours does your company:**

	<b>Tour Operators</b>
<b>Number of respondents</b>	<b>77</b>
Package yourself	36%
Purchase from another NTA tour operator	40%
Purchase from on non-NTA tour operator	24%

**What percentage of your international outbound independent packages does your company?**

	<b>Tour Operators</b>
<b>Number of respondents</b>	<b>43</b>
Package yourself	33%
Purchase from another NTA tour operator	42%
Purchase from on non-NTA tour operator	25%

**Estimate the number of international outbound travelers your company served during 2000:**

	<b>Tour Operators</b>
<b>Number of respondents</b>	<b>70</b>
Average	3,774

**During the past year has your international outbound business:**

	<b>Tour Operators</b>
<b>Number of respondents</b>	<b>77</b>
Increased	56%
Decreased	21%
Stayed the same	23%

**How many years have you been offering international outbound travel products?**

	<b>Tour Operators</b>
<b>Number of respondents</b>	<b>78</b>
Average	12 years

**From which of the following countries do you offer international outbound programs?**

	<b>Tour Operators</b>
<b>Number of respondents</b>	<b>77</b>
Argentina	13%
Australia	70%
Austria	45%
Brazil	12%
Chile	12%
China	44%
France	73%
Germany	65%
Ireland	66%
Israel	25%
Italy	65%
Japan	10%
Korea	7%
Netherlands	47%
New Zealand	58%
Spain	47%
Switzerland	53%
Taiwan	5%
United Kingdom	82%
Venezuela	6%
Other	14%

**Is your company looking for additional business-to-business buying/selling opportunities for international outbound business?**

	<b>Tour Operators</b>
<b>Number of respondents</b>	<b>74</b>
Yes	72%
No	28%

**Where would you like to see additional business opportunities?**

	<b>Tour Operators</b>
<b>Number of respondents</b>	<b>55</b>
NTA Annual Convention	71%
NTA Tour Operator Spring Meet	53%
An additional (new) international event	35%

**What percentage of your visitors are from international markets?**

	<b>DMOs</b>	<b>Tour Suppliers</b>
Average	11%	16%

**During the past year has your number of international visitors:**

	<b>DMOs</b>	<b>Tour Suppliers</b>
Increased	48%	43%
Decreased	9%	22%
Stayed the same	43%	35%

**Are you actively pursuing the international inbound market?**

	<b>DMOs</b>	<b>Tour Suppliers</b>
Yes	71%	70%
No	29%	30%

Which of the following trade shows did your company attend during 2000, and did you exhibit on your own or did you share a booth?

	Tour Operators*	DMOs	Tour Suppliers
<b>Number of respondents</b>	<b>23</b>	<b>122</b>	<b>224</b>
<b>Borsa Internazionale del Turismo</b>		8%	3%
Exhibit on own		1	0
Shared booth		6	4
Did not exhibit		0	0
<b>Fitur</b>		5%	1%
Exhibit on own		3	1
Shared booth		1	1
Did not exhibit		0	0
<b>German Travel Mart</b>		8%	3%
Exhibit on own		3	0
Shared booth		3	3
Did not exhibit		0	0
<b>ITB</b>		47%	19%
Exhibit on own		9	4
Shared booth		25	16
Did not exhibit		2	0
<b>La Cumbre</b>		17%	20%
Exhibit on own		7	10
Shared booth		5	12
Did not exhibit		0	0
<b>POW WOW</b>		81%	56%
Exhibit on own		30	28
Shared booth		30	29
Did not exhibit		1	1
<b>Rendez Vous Canada</b>		14%	44%
Exhibit on own		12	13
Shared booth		0	31
Did not exhibit		0	0
<b>Travel Trade Workshop</b>		6%	0%
Exhibit on own		2	0
Shared booth		2	0
Did not exhibit		0	0
<b>World Travel Market</b>		81%	38%
Exhibit on own		8	8
Shared booth		27	12
Did not exhibit		0	2
<b>Did not attend any trade shows</b>	63%	35%	46%

Note: Of the 94 tour operators who said they do some amount of international business, only 41 percent (or 39 tour operators) attended an international trade show during 2000.

Do you invite tour operators to share your booth?

	DMOs	Tour Suppliers
Yes	20%	11%
No	80%	89%

**If no, would you consider this cooperative marketing opportunity in the future?**

	<b>DMOs</b>	<b>Tour Suppliers</b>
Yes	67%	72%
No	33%	28%

**TOUR OPERATORS ONLY**

**Quarterly Business Update- Second Quarter 2001**

	<b>Greater Than 2000</b>	<b>Less Than 2000</b>	<b>Same As 2000</b>
Number of passengers	34%	42%	24%
Number of departures	27%	41%	32%
Gross revenue	40%	41%	19%

**Does your company belong to any consortiums?**

	<b>Tour Operators</b>
Yes	24%
No	76%

**STATISTICAL INFORMATION**

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

	<b>Tour Operators</b>	<b>DMOs</b>	<b>Suppliers</b>
Average	19	12	14

**Are you a:**

	<b>Tour Operators</b>	<b>DMOs</b>	<b>Suppliers</b>
U.S. member	90%	88%	76%
Canadian member	10%	12%	24%

**Size of company:**

	<b>Tour Operators</b>
Annual sales less than \$1 million	33%
Annual sales \$1million to \$3 million	34%
Annual sales \$3 million to \$5 million	17%
Annual sales \$5 million to \$7 million	7%
Annual sales more than \$7 million	9%

**Gender**

	<b>Tour Operators</b>	<b>DMOs</b>	<b>Suppliers</b>
Female	56%	80%	68%
Male	44%	20%	32%

**AGE - table 1**

	<b>Tour Operators</b>	<b>DMOs</b>	<b>Suppliers</b>
20-24	1%	1%	2%
25-29	0%	8%	11%
30-34	6%	14%	18%
35-39	6%	18%	12%
40-44	9%	16%	12%
45-49	17%	12%	18%
50-54	18%	16%	14%
55-59	25%	8%	6%
60-64	13%	7%	4%
65 or older	4%	0%	3%

**AGE - table 2**

	<b>Tour Operators</b>	<b>DMOs</b>	<b>Suppliers</b>
20-49	39%	69%	73%
50-64	57%	31%	24%
65 or older	4%	0%	3%

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