National Tour Association
2001 Fourth Quarter Results

September 11 Follow-Up Survey – Tour Operators

What continuing effects has your company experienced as a result of the Sept. 11 events?

	Sept. 11 Survey	Fourth Quarter
Cancellations	90%	79%
Slowed bookings	76%	86%
Tour disruptions	41%	17%
Forfeited deposits	38%	32%
Refunded deposits	58%	56%
Other	6%	8%
No effect	4%	4%

Please estimate the financial impact to your company as a result of these events:

	Sept. 11 Survey	Fourth Quarter *
Average	$122,761	$257,477

Note: These numbers should be used with caution – only 85 tour operators responded to this question.

Identify the forms in which this financial impact has occurred:

	Sept. 11 Survey	Fourth Quarter
Client cancellations – immediate	96%	76%
Client cancellations – future	78%	88%
Forfeited supplier deposits/payments	30%	36%
Cancellation penalties	61%	26%
Increased operating costs	18%	39%
Rebookings	24%	38%
Refunds	52%	73%
Tour modifications	n/a	39%
Booking modifications	38%	n/a
Other	1%	5%

How many trips has your company cancelled as a result?

	Sept. 11 Survey	Fourth Quarter
Immediate aftermath (Sept. 11 – 23)	7 average	8 average
Next thirty days (Sept. 24 – Oct. 31)	7 average	10 average
Remainder of 2001 (Nov. 1 – Dec. 31)	6 average	8 average
Next year (2002)	3 average	12 average

What percentage of your trips have been cancelled as a result?

	Sept. 11 Survey	Fourth Quarter
Immediate aftermath (Sept. 11 – 23)	18% average	15% average
Next thirty days (Sept. 24 – Oct. 31)	18% average	12% average
Remainder of 2001 (Nov. 1 – Dec. 31)	13% average	14% average
Next year (2002)	4% average	9% average

How many passengers have cancelled as a result?

	Sept. 11 Survey	Fourth Quarter
Immediate aftermath (Sept. 11 – 23)	129 average	201 average
Next thirty days (Sept. 24 – Oct. 31)	118 average	244 average
Remainder of 2001 (Nov. 1 – Dec. 31)	120 average	237 average
Next year (2002)	128 average	520 average

What percentage of passengers have cancelled as a result?

	Sept. 11 Survey	Fourth Quarter
Immediate aftermath (Sept. 11 – 23)	23% average	18% average
Next thirty days (Sept. 24 – Oct. 31)	21% average	14% average
Remainder of 2001 (Nov. 1 – Dec. 31)	16% average	15% average
Next year (2002)	4% average	8% average

Which of the following trends is your company experiencing?

	Fourth Quarter
Travelers are staying closer to home	89%
Travelers are taking shorter trips	69%
Increase in business to business partnering	22%
Shift in age of travelers	10%
Other	10%
Travelers are taking longer trips	2%

During the first quarter of 2002 do you expect your company's sales volume to increase, decrease or stay the same?

	Fourth Quarter
Increase	12%
Decrease	66%
Stay the same	22%

Is this decrease in sales volume directly related to?

	Fourth Quarter
Events of Sept. 11	35%
Economy in general	19%
Both	46%

Sept. 11 Follow-Up Survey – Tour Suppliers

What effects has your company experienced as a result of the Sept. 11 events?

	Sept. 11 Survey	Fourth Quarter
Cancellations	95%	92%
Slowed bookings	62%	88%
Refunded deposits	44%	43%
Other	10%	16%
No effect	3%	11%

Please estimate the financial impact to your company as a result of these events.

	Sept. 11 Survey	Fourth Quarter
Average	$116,032	$241,614

Identify the forms in which this financial impact has occurred.

	Sept. 11 Survey	Fourth Quarter
Client cancellations – immediate	96%	98%
Client cancellations – future	78%	92%
Forfeited deposits/payments	30%	28%
Waived cancellation penalties	61%	60%
Increased operating costs	18%	15%
Rebookings	24%	35%
Refunds	52%	48%
Booking modifications	38%	52%
Other	1%	8%

Which of the following, if any, has the above mentioned financial impact had on your company?

	Sept. 11 Survey	Fourth Quarter
Potential layoffs	56%	24%
Actual layoffs	n/a	44%
Decrease in overall operating budget	79%	78%
Decrease in marketing budget	60%	56%
Decrease in tourism budget	38%	30%
Increase in marketing budget	n/a	10%
Refocused marketing budget	n/a	59%
Other	3%	3%

How many groups have cancelled their reservation as a result?

	Sept. 11 Survey	Fourth Quarter
Immediate aftermath (Sept. 11 – 23)	16 average	23 average
Next thirty days (Sept. 24 – Oct. 31)	12 average	18 average
Remainder of 2001 (Nov. 1 – Dec. 31)	7 average	14 average
Next year (2002)	1 average	9 average

What percentage of your groups have cancelled their reservation as a result?

	Sept. 11 Survey	Fourth Quarter
Immediate aftermath (Sept. 11 – 23)	39% average	54% average
Next thirty days (Sept. 24 – Oct. 31)	24% average	23% average
Remainder of 2001 (Nov. 1 – Dec. 31)	10% average	14% average
Next year (2002)	3% average	8% average

How many independent travelers have cancelled their reservation as a result?

	Sept. 11 Survey	Fourth Quarter
Immediate aftermath (Sept. 11 – 23)	192 average	131 average
Next thirty days (Sept. 24 – Oct. 31)	145 average	103 average
Remainder of 2001 (Nov. 1 – Dec. 31)	66 average	85 average
Next year (2002)	3 average	21 average

What percentage of your independent travelers have cancelled their reservation as a result?

	Sept. 11 Survey	Fourth Quarter
Immediate aftermath (Sept. 11 – 23)	22% average	15% average
Next thirty days (Sept. 24 – Oct. 31)	15% average	11% average
Remainder of 2001 (Nov. 1 – Dec. 31)	6% average	6% average
Next year (2002)	1% average	2% average

September 11 Follow-Up Survey – DMOs

What effects has your company experienced as a result of the Sept. 11 events?

	Sept. 11 Survey	Fourth Quarter
Decrease in the number of leisure travelers to your area	71%	49%
Decrease in the number of business travelers to your area	70%	54%
Cancelled convention (Sept. 11 – Dec. 31)	54%	40%
Cancelled convention (2002)	5%	9%
Decrease in the number of visitor inquiries to your area	41%	34%
Increase in the number of visitor inquiries to your area	8%	19%
Other	10%	8%
No effect	9%	13%

Which of the following, if any, has the Sept. 11 events had on your organization

	Sept. 11 Survey	Fourth Quarter
Actual layoffs	n/a	9%
Potential layoffs	17%	12%
Decrease in overall operating budget	56%	50%
Decrease in marketing budget	40%	38%
Decrease in tourism budget	34%	34%
Increase in marketing budget	n/a	10%
Refocused marketing budget	n/a	53%
Other	32%	3%

2002 Member Viewpoint Survey – Tour Operators

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

	2000	1999	2001
Post Sept. 11 Industry Economic Relief	n/a	n/a	#1
Unfair Competition	#1	#1	#2
Traveler Safety and Security	#3	#3	#3
Travel Industry Taxes and User Fees	#8	#6	#4
State/Provincial Travel Laws and Regulations	#4	#2	#5
ADA	#2	#4	#6
Environmental Impact/Protection	#9	#8	#7
North American Border Crossing Issues	#5	#7	#8
Federal Land Issues	#7	#5	#9
Local/Municipal Tourism Regulations	#6	#6	#10

Importance of sub-topics within each governmental issue:

ADA

	Tour Operators
Employment Issues	4%
Accommodation of ADA Travelers	96%
Other	4%

Environmental Impact/Protection

	Tour Operators
National Parks Preservation	100%
National Parks Transportation Issues	80%
Other	0%

Post Sept. 11 Industry Economic Relief

	Tour Operators
Small Business Loans	51%
Tax Breaks for Travel Companies	93%
National Marketing Funds	44%
Tax Breaks for Travelers	58%
Other	2%

Federal Lands Issues

	Tour Operators
Tour Operator Access Issues	86%
Entrance Fees	71%
Preservation/Protection	28%
Other	0%

Local/Municipal Tourism Regulations

	Tour Operators
Taxation	56%
Motorcoach Restrictions	89%
Other	4%

North American Border Crossing Issues

	Tour Operators
U.S. – Canadian Border	100%
U.S. – Mexican Border	22%
NAFTA/Tax Issues	7%

State/Provincial Travel Laws and Regulations

	Tour Operators
State Sellers of Travel Laws	92%
Tax Issues	58%
Provincial Travel Taxes	29%
Other	0%

Traveler Safety and Security

	Tour Operators
DOT Regulations	55%
Terrorism	94%
Airline Safety	96%
Natural Disasters	26%
Other	0%

Travel Industry Taxes and User Fees

	Tour Operators
NPS Fees	57%
Local Taxes	69%
Fuel Taxes	69%
Accommodation Taxes	86%
Other	2%

Unfair Competition

	Tour Operators
State/Provincial Govts.	73%
Federal Governments	40%
Local Governments	33%
Other	50%

Did you contact any elected government officials on policy issues?

	1999	2000	2001
Yes, at the local level	17%	22%	28%
Yes, at the state/provincial level	27%	27%	26%
Yes, at the federal	29%	26%	28%
No	59%	59%	54%

Did you contact these officials:

	1999	2000	2001
In Person	32%	38%	36%
In Writing	77%	73%	74%
By Telephone	34%	47%	48%
Via E-mail	26%	28%	41%

Miscellaneous Questions

How many NTA Annual Conventions have you attended in the past three years?

	Tour Operators	DMOs	Tour Suppliers
Average	1.8	2.3	1.9

Did you know that there is destination materials from both tour suppliers and DMOs available for tour operators to use in the Research Center?

	Tour Operators	DMOs	Tour Suppliers
Yes	76%	92%	89%
No	24%	8%	11%

Do you utilize the Research Center for this information?

	Tour Operators
Yes	43%
No	57%

If there were an area set up at the NTA Annual Convention in which you could select DMO and tour supplier brochures of interest to take home, would you take advantage of this opportunity?

	Tour Operators
Yes	61%
No	39%

If there were an area set up at the NTA Annual Convention in which you could display your brochures for tour operators to review and take home, would you take advantage of this opportunity?

	DMOs	Tour Suppliers
Yes	75%	82%
No	25%	18%

How much would you be willing to pay to display your brochures in this specific area at Convention?

	DMOs	Tour Suppliers
Average	$109	$101
Percentage who said $0	34%	30%

Statistical Information

Percentage of customers who are:

	Tour Operators
Student	20%
Young Adult	3%
Baby Boomer	8%
Future Senior	19%
Senior	50%

How many years have you worked in the travel industry?

	Tour Operators	DMOs	Suppliers
Average	21	15	14

Are you a:

	Tour Operators	DMOs	Suppliers
U.S. member	95%	91%	78%
Canadian member	5%	8%	22%
Mexican	0%	1%	0%

Size of company:

	Tour Operators
Annual sales less than $1 million	25%
Annual sales $1million to $3 million	36%
Annual sales $3 million to $5 million	15%
Annual sales $5 million to $7 million	10%
Annual sales more than $7 million	14%

Gender

	Tour Operators	DMOs	Suppliers
Female	47%	75%	65%
Male	53%	25%	35%

AGE - table 1

	Tour Operators	DMOs	Suppliers
20-24	0%	2%	4%
25-29	1%	9%	10%
30-34	3%	13%	14%
35-39	5%	11%	12%
40-44	10%	19%	15%
45-49	20%	16%	9%
50-54	14%	15%	18%
55-59	16%	7%	9%
60-64	20%	7%	6%
65 or older	11%	1%	3%

AGE - table 2

	Tour Operators	DMOs	Suppliers
20-49	39%	70%	64%
50-64	50%	29%	33%
65 or older	11%	1%	3%