

NTA Member Needs Survey - October 2002

Results

Responses Received: Tour Operators: 153 or 25%
 DMOs: 220 or 29%
 Tour Suppliers: 246 or 11%

Has your overall sales volume/visitors/customers during the first three quarters of 2002 (Jan. – Sept.) been greater than, less than or the same as the first three quarters of 2001?

Response	Tour Operators (sales volume)	DMOs (visitors)	Tour Suppliers (customers)
Greater than	24%	42%	37%
Less than	58%	37%	45%
Same	18%	16%	15%
Don't know	n/a	5%	3%

Do you believe your sales volume/visitors/customers during the fourth quarter of 2002 (Oct. - Dec.) will be greater than, less than or the same as the fourth quarter of 2001?

Response	Tour Operators (sales volume)	DMOs (visitors)	Tour Suppliers (customers)
Greater than	36%	41%	43%
Less than	33%	22%	25%
Same	31%	33%	27%
Don't know	n/a	5%	5%

After the events of Sept. 11, did your company lay off any employees?

Response	Tour Operators	DMOs	Tour Suppliers
Yes	38%	9%	30%
No	62%	91%	70%

Has your company hired back any of the employees it laid off?

Response	Tour Operators	DMOs	Tour Suppliers
Yes	30%	10%	49%
No	70%	90%	51%

Has your company hired new people to fill the positions of the people who were laid off?

Response	Tour Operators	DMOs	Tour Suppliers
Yes	25%	15%	41%
No	75%	18%	59%

Which of the following trends is your company experiencing?

Response	Tour Operators
Increase in business to business partnering	34%
Travelers are taking shorter trips	64%
Travelers are taking longer trips	8%
Travelers are staying closer to home	72%
Increase in the number of group travelers	28%
Increase in the number of independent travelers	12%
Decrease in the number of group travelers	40%
Decrease in the number of independent travelers	21%
People are beginning to travel further from home	12%
People are beginning to travel to international destinations	12%
Increase in the number of travelers from the U.S. to Canada	25%
Decrease in the number of travelers from the U.S. to Canada	8%
Shift in the age of travelers	15%
Other	8%

Which of the following trends is your company experiencing?

Response	DMOs	Tour Suppliers
Increase in cooperative marketing	65%	51%
Increase in the number of leisure travelers	60%	54%
Decrease in the number of leisure travelers	20%	38%
Increase in the number of business travelers	12%	18%
Decrease in the number of business travelers	46%	40%
Other	15%	12%

During 2002 has the number of visitor/customer inquiries increased, decreased or stayed the same?

Response	DMOs (visitors)	Tour Suppliers (customers)
Increased	51%	39%
Decreased	17%	23%
Stayed the same	32%	38%

Do you receive the e-mail edition of Tuesday each month?

Response	Tour Operators	DMOs	Tour Suppliers
Yes	73%	71%	66%
No	27%	29%	34%

Which one of the following do you prefer?

Response	Tour Operators	DMOs	Tour Suppliers
E-mail Tuesday	65%	74%	71%
Printed Tuesday	35%	26%	29%

Do you click on the articles and go to the actual electronic version of Tuesday?

Response	Tour Operators	DMOs	Tour Suppliers
Yes	73%	72%	68%
No	27%	28%	32%

Please indicated how much you agree or disagree with the following statements regarding the electronic version of Tuesday.

Electronic Tuesday is easy to access:

Response	Tour Operators	DMOs	Tour Suppliers
Strongly Agree	43%	61%	54%
Somewhat Agree	42%	31%	33%
Neither	8%	6%	8%
Somewhat Disagree	5%	2%	3%
Strongly Disagree	2%	0%	2%

Electronic Tuesday is user friendly:

Response	Tour Operators	DMOs	Tour Suppliers
Strongly Agree	38%	53%	46%
Somewhat Agree	43%	39%	35%
Neither	11%	6%	13%
Somewhat Disagree	5%	2%	5%
Strongly Disagree	3%	0%	1%

Electronic Tuesday is more convenient:

Response	Tour Operators	DMOs	Tour Suppliers
Strongly Agree	36%	52%	48%
Somewhat Agree	28%	19%	20%
Neither	15%	11%	12%
Somewhat Disagree	14%	14%	16%
Strongly Disagree	7%	4%	4%

The articles are relevant to the packaged travel industry:

Response	Tour Operators	DMOs	Tour Suppliers
Strongly Agree	24%	49%	46%
Somewhat Agree	61%	45%	43%
Neither	9%	4%	8%
Somewhat Disagree	6%	1%	2%
Strongly Disagree	0%	0%	0%

The quality of the articles provide value to my business:

Response	Tour Operators	DMOs	Tour Suppliers
Strongly Agree	17%	32%	23%
Somewhat Agree	57%	51%	57%
Neither	20%	15%	15%
Somewhat Disagree	6%	2%	4%
Strongly Disagree	0%	0%	0%

The articles keep me adequately informed about NTA:

Response	Tour Operators	DMOs	Tour Suppliers
Strongly Agree	30%	54%	43%
Somewhat Agree	53%	43%	46%
Neither	10%	2%	9%
Somewhat Disagree	4%	0%	1%
Strongly Disagree	3%	1%	1%

Do you read Courier magazine?

Response	Tour Operators	DMOs	Tour Suppliers
Yes	88%	88%	88%
No	12%	12%	12%

How do you use the NTA Tour Supplier/DMO Member Directory in your day-to-day job? (check all that apply)

Response	Tour Operators	DMOs	Tour Suppliers
As a research tool for appointment scheduling	16%	54%	59%
Company contact information	78%	76%	85%
Corporate property cross reference	9%	3%	8%
Tour planning	70%	9%	14%
View advertising for tour information	15%	9%	11%
Do not use	9%	13%	15%
Other	2%	6%	5%

Do you use the Tour Supplier/DMO Search on NTA Online?

Response	Tour Operators	DMOs	Tour Suppliers
Yes	37%	55%	49%
No	63%	45%	51%

Do you use the Tour Supplier/DMO Search in conjunction with the NTA Tour Supplier/DMO Member Directory?

Response	Tour Operators	DMOs	Tour Suppliers
Yes	34%	51%	49%
No	66%	49%	51%

How useful do you find the printed version of the NTA Leadership Directory?

Response	Tour Operators	DMOs	Tour Suppliers
Extremely useful	15%	15%	14%
Very useful	17%	25%	22%
Somewhat useful	35%	27%	26%
Not very useful	9%	9%	8%
Not at all useful	3%	3%	3%
Do not use the NTA Leadership Directory	20%	21%	27%

With which one of the following statements do you most strongly agree?

Response	Tour Operators	DMOs	Tour Suppliers
I prefer the printed version of the NTA Leadership Directory	65%	58%	58%
I prefer the version of the NTA Leadership Directory that is posted on NTA Online	35%	42%	42%

How interested would you be in an NTA planning calendar which would include all committee and council members, NTA Staff, as well as a seven-day week calendar on one page and then a photograph or advertisement on the other?

Response	Tour Operators	DMOs	Tour Suppliers
Extremely interested	6%	7%	9%
Very interested	10%	17%	14%
Somewhat interested	31%	28%	34%
Not very interested	32%	28%	24%
Not at all interested	20%	19%	19%

How would you use the NTA Calendar?

Response	Tour Operators	DMOs	Tour Suppliers
As a date book	28%	23%	30%
As a directory	33%	43%	42%
Would not use	22%	31%	23%
Other	3%	3%	5%

What size calendar would be most useful?

Response	Tour Operators	DMOs	Tour Suppliers
Smaller (4 7/8 x 8 ")	38%	59%	51%
Larger (8 1/2 x 11")	62%	41%	49%

How interested would your company be in purchasing an advertisement in the calendar?

Response	Tour Operators	DMOs	Tour Suppliers
Extremely interested	0%	1%	1%
Very interested	2%	1%	1%
Somewhat interested	9%	29%	30%
Not very interested	40%	38%	36%
Not at all interested	49%	31%	32%

How much would your company be willing to pay for a full-page, four color advertisement?

Response	Tour Operators	DMOs	Tour Suppliers
\$1,000 to \$1,250	95%	87%	86%
\$1,250 - \$1,500	0%	5%	7%
\$1,500 - \$1,750	0%	5%	7%
\$1,750 to \$2,000	5%	3%	0%

Does your company have a Web site?

Response	Tour Operators	DMOs	Tour Suppliers
Yes	77%	99%	96%
No	23%	1%	4%

How much of your company sales volume is generated through each of the following?

Response	Tour Operators
Consumer direct calls	60%
Company Web site	8%
Travel agents	11%
Other	21%

What is your primary method of educating travel agents about your company's products?

Response	Tour Operators
Direct mail/e-mail/fax	53%
Industry trade shows	10%
Relationships with consortia/associations	14%
Sales representatives	22%
Telemarketing	1%

What is the most effective way for you to learn about new travel agent marketing opportunities?

Response	Tour Operators
Word of mouth	32%
Trade magazines	41%
Consortia/trade associations	22%
Other	5%

Which two industry publications do you read most?

Response	Tour Operators
Courier (NTA)	#1
Travel Weekly	#2

What were your top five selling destinations during 2002?

Response	Tour Operators
Branson	#1
New York/New York City	#2
New England	#3
Washington D.C.	#4
Canada	#5

Please indicate the size of your company.

Response	Tour Operators
Annual sales less than \$1 million	31%
Annual sales \$1 million to \$3 million	37%
Annual sales \$3 million to \$5 million	14%
Annual sales \$5 million to \$7 million	6%
Annual sales more than \$7 million	11%

How many years have you worked in the travel industry?

	Tour Operators	DMOs	Tour Suppliers
Average	21 years	13 years	15 years

Is your company a:

Response	Tour Operators	DMOs	Tour Suppliers
U.S. member	92%	89%	87%
Canadian member	7%	11%	12%
Mexican member	1%	0%	1%

Please indicate your gender.

Response	Tour Operators	DMOs	Tour Suppliers
Female	45%	77%	72%
Male	55%	23%	28%

What is your age?

Response	Tour Operators	DMOs	Tour Suppliers
18 - 24	0%	3%	1%
25 - 29	3%	7%	8%
30 - 34	3%	16%	17%
35 - 39	5%	11%	15%
40 - 44	14%	19%	18%
45 - 49	14%	18%	14%
50 - 54	15%	13%	13%
55 - 59	23%	7%	8%
60 - 64	15%	3%	4%
65 or older	9%	3%	2%