

NTA Trends Analysis Survey – April 2008

Responses Received: Tour Operators – 105 or 18%

Current Events/Trends

Was your overall sales volume during the first quarter of 2008 (Jan, Feb., March) greater than, less than or the same as the first quarter of 2007?

Response	Percent
Greater than	38%
Less than	35%
Same	27%

Tour Operator Information

Which of the following describes your business? (select all that apply)

Response	Percent
My company offers group tours	93%
My company offers one-day sightseeing tours	58%
My company offers receptive services to other tour operators	63%
My company offers independent packages (FITs)	47%
My company offers sightseeing tours as a component of conferences/conventions	41%
My company offers an independent charter services (with our own motorcoaches) to groups other than the ones traveling on our regular group tours	20%
My company involves itself with any/all of the components of meeting planning	22%

Below are some common customer types within the travel industry. These are people who book your products - not the person who actually takes the trip. Indicate the percent of your company's sales volume that results from these customer types.

	Percent
Consumer (book product on their own behalf)	42%
Travel Agent (seats are booked by travel agent on behalf of the passenger)	12%
Other Tour Operators (seats are booked by other tour operators on behalf of their clients)	16%
Group Leader (this person represents the group and books seats on behalf of others, i.e. senior group leaders, bank travel directors, teachers/principals)	31%

Please rank 1 through 7 the following customer types from which you would like your company to have more business. (1 = most desirable channel and 7 = least desirable channel).

Rank Item	Rank
Senior Group Leaders	1
Direct to Consumers	2
Other Tour Operators	3
Bank Travel Leaders	4
All other group leaders	5
Travel Agents	6
Students	7

Which of the following types of customers does your company serve? (select all that apply)

Response	Percent
Students	49%
Young Adults/Gen X (21-38)	43%
Trailing Edge Boomers (39-50)	72%
Leading Edge Boomers (51-59)	82%
Future Seniors/Seniors (60 and older)	92%

What percentage of your customers fall into the following categories?

	Percent
Students (under 21)	17%
Young Adults/Gen X (21-38)	6%
Trailing Edge Boomers (39-50)	13%
Leading Edge Boomers (51-59)	18%
Future Seniors/Seniors (60 and older)	46%

Please estimate the percent of your overall sales volume (both domestic and international) that is derived from:

	Percent
Group Tours	78%
Independent Packages (FIT)	15%
Other	6%

What percent of your tours are:

	Percent
Scheduled/Published	46%
Customized/Preformed	54%

What is the average consumer booking timeline for business with your company?

Response	Percent
14 days in advance	3%
30 days in advance	10%
45 days in advance	19%
60 days in advance	11%
3 to 5 months in advance	34%
6 months in advance	18%
1 year in advance	4%
N/A	1%
Other	1%

Does your company offer guaranteed departures?

Response	Percent
Yes	44%
No	56%

Which of the following types of travel packages does your company offer?

Response	Percent
Agricultural	31%
Alumni	31%
Amusement Parks	24%
Cruises	55%
Culinary	51%
Cultural	73%
Dinner Theater	50%
Ecotours	21%
Ethnic	26%
Events	55%

Fall Foliage	67%
Family	40%
Gaming (casino, etc.)	34%
Garden (floral)	48%
Gay/Lesbian	8%
Hard Adventure	3%
Historic/Heritage	76%
Holidays	62%
Intergenerational	21%
Learning/Educational	52%
Museum	65%
Music	56%
Mystery	31%
National Parks	55%
Religious	35%
Reunion	30%
Science	18%
Shopping	56%
Soft Adventure	44%
Sports (participatory)	12%
Sports (spectator)	41%
Theaters (general)	54%
Voluntourism	9%
Wine Tasting	42%
Women-only	25%

What percentage of your packages include the following components?

Response	Percent
Motorcoach/Ground	81%
Air	28%
Passenger Vessel	14%
Rail	16%
Other	5%

What were your top 10 selling destinations for 2007?

Response	Tour Operators
New York/New York City	#1
Washington, D.C.	#2
Branson	#3
Alaska	#4
Pigeon Forge	#5
New England	#5
Chicago	#7
Philadelphia	#8
Canada	#8
Boston	#8

Please indicate the size of your company.

Response	Percent
Annual sales less than \$1 million	29%
Annual sales \$1 million to \$3 million	33%
Annual sales \$3 million to \$5 million	14%
Annual sales \$5 million to \$7 million	7%
Annual sales \$7 million to \$10 million	4%
Annual sales more than \$10 million	12%

International Business

For purposes of this survey, international inbound refers to travel to North America and international outbound refers to travel to overseas countries outside of North America.

My company currently arranges travel packages that are:

Response	Percent
Domestic Only (North America)	30%
Domestic and International Inbound	10%
Domestic and International Outbound	27%
Domestic and both International Inbound and Outbound	24%
International Inbound Only	3%
International Outbound Only	6%

During the past year has your international inbound business:

Response	Percent
Increased	55%
Decreased	13%
Stayed the same	32%

From which of the following countries does your company offer international inbound programs? (Please note: This percent is based on only the members who offer international outbound)

Response	Percent
Antigua and Barbara	3%
Argentina	17%
Aruba	0%
Australia	57%
Austria	20%
Bahamas	6%
Barbados	0%
Belgium	23%
Belize	0%
Bermuda	0%
Brazil	17%
British Virgin Islands	3%
Cayman Islands	3%
Chile	11%
China	26%
Croatia	3%
Curacao	0%
Cyprus	0%
Czech Republic	17%
Denmark	11%
Dominica	0%
Dominican Republic	0%
Dubai	6%
Egypt	6%
England	49%
France	54%

French Polynesia	6%
Germany	51%
Greece	17%
Grenada	0%
Guatemala	0%
Holland	37%
Hong Kong	8%
Hungary	6%
Iceland	11%
India	14%
Ireland	40%
Israel	17%
Italy	37%
Japan	31%
Kenya	3%
Liberia	0%
Lithuania	3%
Luxembourg	8%
Malaysia	3%
Maldives	0%
Malta	3%
Mexico	28%
Monaco	0%
Morocco	6%
Netherlands	23%
New Zealand	28%
North Korea	3%
Norway	6%
Peru	3%
Philippines	3%
Poland	8%
Portugal	14%
Puerto Rico	8%
Romania	6%
Russia	14%
Saudi Arabia	6%
Scandinavia	11%

Senegal	0%
Singapore	14%
South Africa	17%
South Korea	6%
Spain	23%
St. Kitts & Nevis	0%
St. Lucia	0%
St. Vincent	0%
Sweden	20%
Switzerland	23%
Taiwan	6%
Thailand	3%
Turkey	3%
Turks and Caicos	0%
United Kingdom	54%
Venezuela	3%
Vietnam	3%
Virgin Islands	6%

During the past year has your international outbound business:

Response	Percent
Increased	37%
Decreased	25%
Stayed the same	38%

For which of the following countries does your company offer international outbound programs? (Please note: This percent is based on only the members who offer international outbound)

Response	Percent
Antigua and Barbara	11%
Argentina	16%
Aruba	11%
Australia	58%
Austria	34%
Bahamas	18%
Barbados	9%
Belgium	27%
Belize	14%
Bermuda	14%
Brazil	20%
British Virgin Islands	5%
Cayman Islands	5%
Chile	18%
China	38%
Croatia	16%
Curacao	4%
Cyprus	9%
Czech Republic	25%
Denmark	29%
Dominica	4%
Dominican Republic	11%
Dubai	5%
Egypt	24%
England	60%
France	49%
French Polynesia	7%
Germany	51%
Greece	49%
Grenada	4%
Guatemala	9%
Holland	38%
Hong Kong	20%

Hungary	20%
Iceland	24%
India	16%
Ireland	64%
Israel	14%
Italy	64%
Japan	16%
Kenya	9%
Liberia	0%
Lithuania	7%
Luxembourg	16%
Malaysia	4%
Maldives	2%
Malta	14%
Mexico	47%
Monaco	14%
Morocco	16%
Netherlands	31%
New Zealand	49%
North Korea	2%
Norway	36%
Peru	24%
Philippines	4%
Poland	24%
Portugal	31%
Puerto Rico	11%
Romania	9%
Russia	24%
Saudi Arabia	0%
Scandinavia	25%
Senegal	2%
Singapore	11%
South Africa	20%
South Korea	5%
Spain	36%
St. Kitts & Nevis	7%
St. Lucia	13%

St. Vincent	2%
Sweden	24%
Switzerland	49%
Taiwan	4%
Thailand	25%
Turkey	25%
Turks and Caicos	5%
United Kingdom	54%
Venezuela	5%
Vietnam	18%
Virgin Islands	13%

What are the most important issues/trends in the packaged travel industry today?

Response	Percent
Consolidation and mergers	12%
Demographic changes	33%
Product diversity	32%
Changing distribution channels	34%
Technological advances and changes	35%
Changes in planning/booking patterns	51%
Advocacy - government and industry relations	11%
Security concerns/issues	30%
Crisis management	8%
Liability management	16%
Data mining for customized marketing to consumers	11%
Reduced group sizes	63%
Increase in intergenerational travel	11%
Increase in intermodal travel	7%
Growth in experiential travel	19%
Growth in niche/affinity travel	25%
Growth in FIT market	25%
Increased competition	24%
U.S. image abroad	22%
Price instability/fluctuating costs (fuel, insurance, etc.)	77%
Other	9%

What are the most important issues for NTA in the next year?

Response	Percent
Member growth and diversity	45%
Member involvement/activity	43%
Improved technology	25%
Consolidation and mergers within the industry	14%
Education/research on changing consumers	47%
Education/research on product diversity/development	39%
Reformatting/updating of Annual Convention	30%
Reformatting of Spring Meet	11%
Tracking/ROI	22%
Other	5%

What changes do you foresee taking place within your company during the next year?

Response	Percent
Increased product diversity	50%
Change in consumer demographics	44%
Online booking engine	37%
Increased investment in technology	42%
Increase in group travelers	32%
Increase in FIT travelers	30%
Decrease in group travelers	10%
Decrease in FIT travelers	0%
New distribution channels	37%
Growth in partnering with tour operators	56%
Growth in partnering with suppliers and DMOs	36%
Increase in profits	30%
Steady profits	31%
Decrease in profits	15%
Shorter booking times	54%
Longer booking times	4%
Other	1%

Does your company/organization have a Web site?

Response	Tour Operators
Yes	92%
No	8%

Does your company sell and collect money for tours/packages sold through your Web site?

Response	Tour Operators
Yes	22%
No	78%

What percentage of your total sales is obtained through your Web site?

Response	Tour Operators
Average	18%

How many years have you worked in the travel industry?

Response	Tour Operators
Average number of years	23

How many years have you been a member of NTA?

Response	Tour Operators
Average number of years	12

Are you a:

Response	Tour Operators
U.S. member	85%
Canadian member	8%
Mexican member	1%
International member	5%

Note: Sums may not total 100% due to rounding.