

2004 July NTA Member Needs Survey Results

Responses Received: Tour Operators: 98 or 16%.

Because some of the respondent bases are low these numbers should be used with caution.

Was your overall sales volume during the second quarter of 2004 (April, May, June) greater than, less than or the same as 2003?

Response	Percent
Greater than	60%
Less than	22%
Same as	18%

During the third quarter of 2004 (July, August, September) do you expect your overall sales volume to be greater than, less than or the same as the third quarter of 2003?

Response	Percent
Greater than	49%
Less than	22%
Same as	29%

How many of your employees are full time?

Response	2000	2004	% change
1 to 3	34%	39%	+15%
4 to 6	28%	26%	-7%
7 to 9	11%	10%	-9%
10 to 15	10%	4%	-60%
15 to 19	3%	2%	-33%
20 or more	13%	19%	+46%

How many of your employees are part time?

Response	2000	2004	% change
1 to 3	51%	47%	-8%
4 to 6	9%	24%	+167%
7 to 9	9%	7%	-22%
10 to 15	8%	8%	no change
15 to 19	3%	2%	-33%
20 or more	20%	12%	-40%

How many of your full-time and part-time employees are primarily dedicated to: (do not include tour guides or drivers)

	Group Travel	Retail Travel Agency Operations	Independent Packages (FIT travel)
Full-time	16	3	2
Part-time	10	1	1

What is your annual turnover rate?

	2000	2004
Average	7%	5%

Which of the following best describes the location of your main office?

Response	2000	2004	% change
Retail/walk-in	22%	24%	+9%
Residence	20%	20%	no change
Commercial office	55%	52%	-5%
Other	3%	4%	+33%

How many office locations do you have?

Response	2000	2004
Average	1.48	1.87

Which of the following describes the ownership structure of your company?

Response	2000	2004	% change
Sole proprietorship	13%	13%	no change
Corporation	86%	74%	-14%
Partnership	1%	2%	+100%
LLC	n/a	11%	n/a

Is your tour operation a division of another corporation?

Response	2000	2004	% change
Yes	16%	12%	-25%
No	84%	88%	+5%

What is your company's annual gross sales from all areas of operation (U.S. dollars)?

Response	2000	2004	% change
Less than \$500,000	9%	9%	no change
\$500,001 - \$1,000,000	19%	21%	+11%
\$1,000,001 - \$2,000,000	19%	18%	+5%
\$2,000,001 - \$3,000,000	12%	13%	+8%
\$3,000,001 - \$5,000,000	17%	17%	no change
\$5,000,001 - \$7,000,000	9%	5%	-44%
\$7,000,001 - \$10,000,000	2%	2%	no change
\$10,000,001 - \$15,000,000	4%	4%	no change
\$15,000,001 - \$20,000,000	3%	3%	no change
More than \$20,000,000	6%	7%	+17%

Of your annual gross sales, what portion can be attributed to: (U.S. dollars)

	Less than \$500,000	\$500,001 to \$1,000,000	\$1,000,001 to \$2,000,000	2,000,001 to \$5,000,000	\$5,000,001 to \$10,000,000	More than \$10,000,000
Group Travel	18%	23%	26%	20%	6%	6%
Travel Agency	45%	18%	21%	6%	3%	6%
Independent Packages (FITs)	58%	15%	17%	2%	5%	1%
Other	63%	11%	0%	19%	7%	0%

Gross Sales Attributed to Group Travel

Response	2000	2004	% change
Less than \$500,000	19%	18%	-5%
\$500,001 to \$1,000,000	21%	23%	+10%
\$1,000,001 to \$2,000,000	18%	26%	+44%
2,000,001 to \$5,000,000	25%	20%	-20%
\$5,000,001 to \$10,000,000	11%	6%	-45%
More than \$10,000,000	8%	6%	-25%

Gross Sales Attributed to Travel Agency

Response	2000	2004	% change
Less than \$500,000	37%	45%	+22%
\$500,001 to \$1,000,000	33%	18%	-45%
\$1,000,001 to \$2,000,000	12%	21%	+75%
2,000,001 to \$5,000,000	14%	6%	-57%
\$5,000,001 to \$10,000,000	4%	3%	-25%
More than \$10,000,000	0%	6%	+600%

Gross Sales Attributed to Independent Packages (FITs)

Response	2000	2004	% change
Less than \$500,000	52%	58%	+10%
\$500,001 to \$1,000,000	28%	15%	-46%
\$1,000,001 to \$2,000,000	8%	17%	+112%
2,000,001 to \$5,000,000	8%	2%	-75%
\$5,000,001 to \$10,000,000	0%	5%	+500%
More than \$10,000,000	2%	1%	+50%

How many years has your company been in business?

Response	2000	2004
Average	22 years	21 years

How many tours does your company operate annually?

Response	2000	2004	% change
Total	194	201	+3%
One-day	86	74	-14%
Multi-day	108	127	+148%

Of the multi-day tours your company offers, what is the average number of nights of the tour?

Response	2000	2004
Average	5.6 days	4.4 nights

During 2003 how many customers did your company serve?

Response	Percent
Less than 500	5%
501 to 1,000	14%
1,001 to 3,000	24%
3,001 to 5,000	15%
5,001 to 10,000	12%
10,001 to 15,000	6%
15,001 to 20,000	8%
20,001 to 25,000	1%
More than 25,000	13%

How many customers do you project your company will serve during 2004?

Response	Percent
Less than 500	5%
501 to 1,000	10%
1,001 to 3,000	25%
3,001 to 5,000	18%
5,001 to 10,000	12%
10,001 to 15,000	10%
15,001 to 20,000	4%
20,001 to 25,000	3%
More than 25,000	13%

2003 Actual versus 2004 Projected

Response	2003 Actual	2004 Projected
Less than 500	5%	5%
501 to 1,000	14%	10%
1,001 to 3,000	24%	25%
3,001 to 5,000	15%	18%
5,001 to 10,000	12%	12%
10,001 to 15,000	6%	10%
15,001 to 20,000	8%	4%
20,001 to 25,000	1%	3%
More than 25,000	13%	13%

What percentage of your group travel business is (total must equal 100%):

Response	2000	2004	% change
Scheduled/Published	37%	41%	+11%
Customized	37%	36%	-3%
Preformed	26%	23%	-12%

Is your company:

(Percentages)	2000	2004	% change
ARC appointed	40%	43%	+8%
IATAN appointed	50%	57%	+12%
CLIA appointed	54%	50%	-7%

What percentage of your total operating expenses goes towards the following:

Administrative Payroll	Non-Administrative Payroll
21%	24%

What is your average daily rate of compensation for your tour directors/tour guides (inclusive of wages, commissions)?

Response	2000	2004	2004
Average	\$113	\$99	-12%

Are your tour directors/tour guides/drivers classified as:

Response	2000	2004	2004
Employees	39%	33%	-16%
Independent Contractors	36%	32%	-11%
Both	25%	35%	+40%

How many tour guides are directly employed by your tour company?

Response	2000	2004
# of tour guides	10	9

How many drivers are directly employed by your tour company?

Response	2000	2004
# of drivers	21	7

What is your company's required educational level for the following positions?

(Percentages)	High School Diploma	Some College	College Degree	Post-Graduate Degree
Upper Management	14%	32%	48%	6%
Operations Manager	25%	35%	39%	1%
Tour Planner	42%	34%	23%	1%
Sales/Marketing Manager	29%	32%	37%	2%
Tour Director	45%	36%	19%	0%
Tour Guide	51%	39%	11%	0%
Drivers	91%	9%	0%	0%

Required Educational Level – Upper Management

Response	2000	2004	% change
High School Diploma	15%	14%	-6%
Some College	30%	32%	+7%
College Degree	47%	48%	-2%
Post-Graduate Degree	8%	6%	-25%

Required Educational Level – Operations Manager

Response	2000	2004	% change
High School Diploma	21%	25%	+19%
Some College	45%	35%	-22%
College Degree	31%	39%	+26%
Post-Graduate Degree	3%	1%	-67%

Required Educational Level – Tour Planner

Response	2000	2004	% change
High School Diploma	42%	42%	no change
Some College	38%	34%	-11%
College Degree	20%	23%	+15%
Post-Graduate Degree	0%	1%	+100%

Required Educational Level – Sales/Marketing Manager

Response	2000	2004	% change
High School Diploma	28%	29%	+4%
Some College	40%	32%	-20%
College Degree	32%	37%	+16%
Post-Graduate Degree	0%	2%	+200%

Required Educational Level – Tour Director

Response	2000	2004	% change
High School Diploma	52%	45%	-13%
Some College	33%	36%	+9%
College Degree	13%	19%	+46%
Post-Graduate Degree	2%	0%	-100%

Required Educational Level – Tour Guide

Response	2000	2004	% change
High School Diploma	52%	51%	-2%
Some College	33%	39%	+18%
College Degree	13%	11%	-15%
Post-Graduate Degree	2%	0%	-100%

Required Educational Level – Drivers

Response	2000	2004	% change
High School Diploma	83%	91%	+10%
Some College	15%	9%	-40%
College Degree	2%	0%	-100%
Post-Graduate Degree	0%	0%	no change

Regarding employee benefit programs, please indicate what programs are offered to full-time employees and how much the company pays:

(Percentages)	All	A Portion	None
Individual Health Insurance	28%	44%	28%
Family Health Insurance	15%	29%	56%
Life Insurance	25%	17%	58%
Short-Term Disability	15%	18%	67%
Long-Term Disability	18%	13%	69%
Retirement/Pension Plan	16%	42%	42%
Company Profit Sharing	19%	22%	59%
Bonus/Incentive	53%	26%	21%
FAM Tour Participation	57%	33%	10%
Vacation	78%	14%	8%
Sick Time	64%	18%	17%
Personal Time	50%	25%	25%
Reimbursement for Education/Training	40%	40%	20%

Portion Company Pays for Full-Time Employees – Individual Health Insurance

Response	2000	2004	% change
All	48%	28%	-42%
A Portion	32%	44%	+38%
None	20%	28%	+40%

Portion Company Pays for Full-Time Employees – Family Health Insurance

Response	2000	2004	% change
All	19%	15%	-21%
A Portion	33%	29%	-12%
None	48%	56%	+17%

Portion Company Pays for Full-Time Employees – Life Insurance

Response	2000	2004	% change
All	31%	25%	-19%
A Portion	20%	17%	-15%
None	49%	58%	+18%

Portion Company Pays for Full-Time Employees – Short-Term Disability

Response	2000	2004	% change
All	20%	15%	-25%
A Portion	12%	18%	+50%
None	69%	67%	-3%

Portion Company Pays for Full-Time Employees – Long-Term Disability

Response	2000	2004	% change
All	19%	18%	-5%
A Portion	13%	13%	no change
None	68%	69%	+1%

Portion Company Pays for Full-Time Employees – Retirement/Pension Plan

Response	2000	2004	% change
All	25%	16%	-36%
A Portion	34%	42%	+19%
None	41%	42%	+2%

Portion Company Pays for Full-Time Employees – Company Profit Sharing

Response	2000	2004	% change
All	21%	19%	-10%
A Portion	17%	22%	+29%
None	62%	59%	-5%

Portion Company Pays for Full-Time Employees – Bonus/Incentive

Response	2000	2004	% change
All	55%	53%	-4%
A Portion	23%	26%	+13%
None	22%	21%	-5%

Portion Company Pays for Full-Time Employees – FAM Tour Participation

Response	2000	2004	% change
All	61%	57%	-7%
A Portion	26%	33%	+27%
None	13%	10%	-23%

Portion Company Pays for Full-Time Employees – Vacation

Response	2000	2004
All	n/a	78%
A Portion	n/a	14%
None	n/a	8%

Portion Company Pays for Full-Time Employees – Sick Time

Response	2000	2004
All	n/a	64%
A Portion	n/a	18%
None	n/a	17%

Portion Company Pays for Full-Time Employees – Personal Time

Response	2000	2004
All	n/a	50%
A Portion	n/a	25%
None	n/a	25%

Portion Company Pays for Full-Time Employees – Reimbursement for Education/Training

Response	2000	2004	% change
All	34%	40%	+18%
A Portion	25%	40%	+60%
None	40%	20%	-50%

Regarding employee benefit programs, please indicate what programs are offered to part-time employees and how much the company pays:

(Percentages)	All	A Portion	None
Individual Health Insurance	4%	11%	85%
Family Health Insurance	1%	9%	90%
Life Insurance	1%	1%	98%
Short-Term Disability	0%	3%	97%
Long-Term Disability	0%	3%	97%
Retirement/Pension Plan	3%	7%	90%
Company Profit Sharing	5%	6%	89%
Bonus/Incentive	20%	17%	63%
FAM Tour Participation	21%	24%	50%
Vacation	20%	12%	68%
Sick Time	16%	13%	71%
Personal Time	15%	15%	70%
Reimbursement for Education/Training	18%	32%	50%

Portion Company Pays for Part-Time Employees – Individual Health Insurance

Response	2000	2004	% change
All	4%	4%	no change
A Portion	11%	11%	no change
None	85%	85%	no change

Portion Company Pays for Part-Time Employees – Family Health Insurance

Response	2000	2004	% change
All	1%	1%	no change
A Portion	6%	9%	+50%
None	93%	90%	-3%

Portion Company Pays for Part-Time Employees – Life Insurance

Response	2000	2004	% change
All	4%	1%	-75%
A Portion	4%	1%	-75%
None	92%	98%	+7%

Portion Company Pays for Part-Time Employees – Short-Term Disability

Response	2000	2004	% change
All	1%	0%	-100%
A Portion	2%	3%	+50%
None	97%	97%	no change

Portion Company Pays for Part-Time Employees – Long-Term Disability

Response	2000	2004	% change
All	1%	0%	-100%
A Portion	2%	3%	+50%
None	97%	97%	no change

Portion Company Pays for Part-Time Employees – Retirement/Pension Plan

Response	2000	2004	% change
All	6%	3%	-50%
A Portion	7%	7%	no change
None	87%	90%	+3%

Portion Company Pays for Part-Time Employees – Company Profit Sharing

Response	2000	2004	% change
All	3%	5%	+67%
A Portion	4%	6%	+50%
None	93%	89%	-4%

Portion Company Pays for Part-Time Employees – Bonus/Incentive

Response	2000	2004	% change
All	22%	20%	-9%
A Portion	16%	17%	+6%
None	62%	63%	+2%

Portion Company Pays for Part-Time Employees – FAM Tour Participation

Response	2000	2004	% change
All	27%	21%	-22%
A Portion	21%	24%	+14%
None	52%	50%	-4%

Portion Company Pays for Part-Time Employees – Vacation

Response	2000	2004
All	n/a	20%
A Portion	n/a	12%
None	n/a	68%

Portion Company Pays for Part-Time Employees – Sick Time

Response	2000	2004
All	n/a	16%
A Portion	n/a	13%
None	n/a	71%

Portion Company Pays for Part-Time Employees – Personal Time

Response	2000	2004
All	n/a	15%
A Portion	n/a	15%
None	n/a	70%

Portion Company Pays for Part-Time Employees – Reimbursement for Education/Training

Response	2000	2004
All	n/a	18%
A Portion	n/a	32%
None	n/a	50%

How long must your employees be employed before they begin receiving the following company benefits?

(Percentages)	Three Months	Six Months	Nine Months	One Year	Five Years	Other
Bonus/Incentives	20%	35%	3%	40%	0%	2%
Company Profit Sharing	13%	23%	3%	59%	0%	1%
Health Insurance	54%	25%	0%	15%	0%	6%
Personal Time	37%	30%	5%	27%	0%	2%
Reimbursement for Education/Training	34%	31%	4%	25%	3%	5%
Sick Time	37%	31%	4%	24%	0%	3%
Vacation (1 week)	14%	30%	6%	48%	0%	2%
Vacation (2 weeks)	6%	6%	6%	51%	21%	13%
Vacation (3 weeks)	0%	2%	2%	3%	65%	28%

Length of Employment to Receive – Bonus/Incentives

Response	2000	2004	% change
Three Months	36%	20%	-44%
Six Months	15%	35%	+133%
Nine Months	6%	3%	-50%
One Year	40%	40%	no change
Five Years	0%	0%	no change
Other	4%	2%	-50%

Length of Employment to Receive – Company Profit Sharing

Response	2000	2004	% change
Three Months	10%	13%	+30%
Six Months	12%	23%	+92%
Nine Months	4%	3%	-25%
One Year	62%	59%	-5%
Five Years	6%	0%	-100%
Other	6%	1%	-83%

Length of Employment to Receive – Health Insurance

Response	2000	2004	% change
Three Months	64%	54%	-16%
Six Months	17%	25%	+47%
Nine Months	1%	0%	-100%
One Year	9%	15%	+67%
Five Years	0%	0%	no change
Other	10%	6%	-40%

Length of Employment to Receive – Personal Time

Response	2000	2004	% change
Three Months	50%	37%	-26%
Six Months	22%	30%	+30%
Nine Months	4%	5%	-25%
One Year	15%	27%	+80%
Five Years	1%	0%	-100%
Other	8%	2%	-75%

Length of Employment to Receive – Reimbursement for Education/Training

Response	2000	2004	% change
Three Months	36%	34%	-6%
Six Months	22%	31%	+41%
Nine Months	3%	2%	-33%
One Year	32%	25%	-22%
Five Years	0%	3%	+300%
Other	8%	5%	-38%

Length of Employment to Receive – Sick Time

Response	2000	2004	% change
Three Months	56%	37%	-34%
Six Months	22%	31%	+41%
Nine Months	2%	4%	+100%
One Year	12%	24%	+100%
Five Years	0%	0%	no change
Other	9%	3%	-67%

Length of Employment to Receive – Vacation (1 week)

Response	2000	2004	% change
Three Months	15%	14%	-7%
Six Months	30%	30%	no change
Nine Months	2%	6%	+200%
One Year	50%	48%	-4%
Five Years	0%	0%	no change
Other	3%	2%	-33%

Length of Employment to Receive – Vacation (2 weeks)

Response	2000	2004	% change
Three Months	9%	6%	-33%
Six Months	2%	6%	+200%
Nine Months	3%	6%	+100%
One Year	59%	51%	-16%
Five Years	10%	21%	+110%
Other	17%	13%	-24%

Length of Employment to Receive – Vacation (3 weeks)

Response	2000	2004	% change
Three Months	6%	0%	-100%
Six Months	5%	2%	-60%
Nine Months	1%	2%	+100%
One Year	6%	3%	-50%
Five Years	55%	65%	+18%
Other	27%	28%	+4%

List your top three selling destinations.

Response	2004
New York/New York City	#1
Branson	#2
Washington, DC	#3

Most popular international destination.

Response	2004
Ireland	#1
Italy	#1
England	#3

List your top three most popular shopping destinations.

Response	2004
New York City	#1
Chicago	#2
Mall of America	#3

List your three most popular historical/cultural destinations.

Response	2004
Washington, DC	#1
New York City	#2
Boston	#3

List the top three hotel chains that work best with the packaged travel industry (i.e. value, quality, customer service, amenities).

Response	2004
Best Western	#1
Marriott	#2
Hampton Inns	#3

How frequently do you refer to the Profile Form Notebook when you return from Convention?

Response	Percent
Often	49%
Seldom	39%
Never	7%
Don't attend Convention	5%

How valuable is the Profile Form Notebook to your business?

Response	Percent
Average	5.8

Are you a:

Response	2004
U.S. member	95%
Canadian member	5%
Mexican member	0%
International member	0%

Please indicate your gender.

Response	2004
Female	47%
Male	53%

What is your age?

Response	2004
18 - 24	0%
25 - 29	0%
30 - 34	4%
35 - 39	6%
40 - 44	13%
45 - 49	16%
50 - 54	17%
55 - 59	19%
60 - 64	16%
65 or older	9%

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