

NTA Member Needs Survey Results – August 2003

Responses Received: Tour Operators: 117 or 20%
Tour Suppliers: 380 or 19%
DMOs: 179 or 24%

Tour Operators

Was the number of passengers your company served during the second quarter of 2003 (April, May, June) greater than, less than or the same as the second quarter of 2002?

Response	Tour Operators
Greater than	24%
Less than	57%
Same as	19%

Was the number of departures your company had during the second quarter of 2003 (April, May, June) greater than, less than, or the same as the second quarter of 2002?

Response	Tour Operators
Greater than	22%
Less than	50%
Same as	28%

Was your overall sales volume during the second quarter of 2003 (April, May, June) greater than, less than, or the same as 2002?

Response	Tour Operators
Greater than	24%
Less than	59%
Same as	17%

During the third quarter of 2003 (July, August, September) do you expect your company's sales volume to be greater than, less than, or the same as the third quarter of 2002? Why?

Response	Tour Operators
Greater than	26%
Less than	45%
Same as	29%

Which of the following describes your business?

Response	2003	2001
My company offers group tours	96%	93%
My company offers one-day sightseeing tours	55%	62%
My company offers receptive services to other tour operators	50%	53%
My company offers independent packages (FITs)	31%	34%
My company offers sightseeing tours as a component of conferences/conventions	35%	39%
My company offers an independent charter service (with our own motorcoaches) to groups other than ones traveling on our regular group tours	26%	20%
My company involves itself with any/all components of meeting planning	26%	23%

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

Response	2003	2001
Consumers	42%	48%
Travel Agents	13%	13%
Other Tour Operators	13%	9%
Group Leaders	32%	36%

If any of your customers are group leaders, please indicate the percentage of your company's sales volume that results from the following types of group leaders.

Response	2003	2001
Senior Group Leaders	41%	48%
Bank Travel Directors	10%	13%
Teachers/Principals	20%	22%
Other Group Leaders	19%	17%

Please rank in order 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	2003	2001
Bank Travel Leaders	1	3
Senior Group Leaders	2	1
Other Tour Operators	3	5
All Other Group Leaders	4	2
Direct to Consumers	5	4
Travel Agents	6	6
Students	7	7

What percentage of your customers fall into the following categories?

Response	Tour Operators
Student	17%
Young Adult (21-34)	5%
Baby Boomer (35-53)	14%
Future Senior (54-64)	23%
Seniors (65 and older)	41%

Percent of your overall sales volume (both domestic and international) that is derived from:

Response	Tour Operators
Group Tours	82%
Independent Packages	12%
Other	6%

Number of passengers company served for pacackages:

Response	2002	2003
Overnight	7,529	7,071
Day	3,496	3,657

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

Response	2003	2001
Agricultural	24%	22%
Alumni	31%	26%
Amusement Parks	35%	43%
Cruises	67%	78%
Cultural	59%	66%
Dinner Theaters	58%	72%
Ecotours	22%	22%
Events	58%	72%
Fall Foliage	74%	79%
Family	35%	36%
Gaming (casino, etc.)	44%	51%
Garden (floral)	55%	52%
Gay/Lesbian	8%	4%
Grandparent/Grandchild	28%	26%
Hard Adventure	10%	7%
Historic Heritage	73%	79%
Holidays	63%	63%
Learning	34%	19%
Museum	68%	66%
Music	53%	57%
Mystery	39%	47%
National Parks	67%	65%
Religious	33%	41%
Reunion	35%	29%
Science	20%	23%
Shopping	55%	59%
Soft Adventure	44%	25%
Sports (golf, skiing, etc.)	26%	20%
Sports	36%	38%
Student	47%	n/a
Theaters (general)	65%	70%
Wine Tasting	39%	37%

How often do you refer to the NTA Preferred Provider Book that was sent to you in January?

Response	Tour Operators
Very often	16%
Somewhat often	32%
Seldom	38%
Not at all	15%

How useful is the NTA Preferred Provider Book?

Response	Tour Operators
Extremely useful	13%
Very useful	21%
Somewhat useful	55%
Not very useful	11%
Not at all useful	0%

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

Response	Tour Operators
0	27%
1	12%
2	17%
3	44%

How many NTA Tour Operator Spring Meets have you attended in the past three years?

Response	Tour Operators
0	53%
1	14%
2	15%
3	18%

Complete the following statement: "My company currently arranges travel packages that are..."

Response	Percent
Domestic Only (North America)	36%
Domestic and International Inbound	13%
Domestic and International Outbound	31%
Domestic and both International Inbound and Outbound	16%
International Inbound Only	2%
International Outbound Only	2%

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

Response	Tour Operators
Group Tours	80%
Independent Pacakges	20%
Other	0%

During the past year has your international inbound business:

Response	Tour Operators
Increased	17%
Decreased	50%
Stayed the same	33%

For which of the following countries does your company offer international inbound programs?

Response	Tour Operators
Argentina	8%
Australia	19%
Brazil	11%
Chile	3%
China	5%
France	31%
Germany	56%
Ireland	19%
Israel	8%
Italy	22%
Japan	19%
Korea	11%
Netherlands	8%
New Zealand	14%
Spain	17%
Switzerland	14%
Taiwan	6%
United Kingdom	67%
Venezuela	1%

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

Response	Tour Operators
Group Tours	79%
Independent Packages	20%
Other	1%

During the past year has your international outbound business:

Response	Tour Operators
Increased	10%
Decreased	63%
Stayed the same	27%

For which of the following countries does your company offer international outbound programs?

Response	Tour Operators
Argentina	16%
Australia	56%
Brazil	12%
Chile	12%
China	23%
France	53%
Germany	63%
Ireland	77%
Israel	9%
Italy	65%
Japan	9%
Korea	2%
Netherlands	44%
New Zealand	40%
Spain	49%
Switzerland	53%
Taiwan	7%
United Kingdom	81%
Venezuela	4%
Scandinavia	1%
Russia	1%
Costa Rica	1%

In addition to the time you invest in other NTA events, can you spare three to five days (inclusive of a weekend) away from your offices for a networking opportunity with other NTA tour operators?

Response	Tour Operators
Yes	58%
No	42%

What is the most you would pay for such an opportunity? (Assume the amount would include registration, food, lodging, and activity fees, but does not include transportation to the event.)

Response	Tour Operators
Less than \$400	46%
\$400 - \$600	41%
\$601 - \$800	7%
\$801 - \$1,000	2%
\$1,001 - \$1,200	2%
More than \$1,200	2%

Which one type of venue would you most prefer for the event?

Response	Tour Operators
Golf	11%
Skiing	3%
Cruise	64%
Other	22%

In which month would you most prefer to have the event take place? (check only one response)

Response	Tour Operators
January	22%
February	31%
March	6%
April	4%
May	3%
June	6%
July	10%
August	4%
September	4%
October	3%
November	6%
December	0%

Please indicate the size of your company.

Response	Tour Operators
Annual sales less than \$1 million	26%
Annual sales \$1 million to \$3 million	46%
Annual sales \$3 million to \$5 million	10%
Annual sales \$5 million to \$7 million	5%
Annual sales more than \$7 million	13%

How many years have you worked in the travel industry?

Response	Tour Operators
Average	21 years

Are you a:

Response	Tour Operators
U.S. member	94%
Canadian member	4%
Mexican member	0%
International Affiliate member	2%

DMOs

Was the number of visitors to your area during the second quarter of 2003 (April, May, June) greater than, less than, or the same as the second quarter of 2002?

Response	Percent
Greater than	32%
Less than	36%
Same as	25%
Don't track	7%

Do you feel the number of visitors to your area during the third quarter of 2003 (July, August, September) will be greater than, less than or the same as the third quarter of 2002?

Response	Percent
Greater than	42%
Less than	17%
Same as	36%
Don't track	5%

Which of the following trends is your organization experiencing?

Response	Percent
Increase in cooperative marketing	54%
Increase in the number of leisure travelers to my area	60%
Decrease in the number of leisure travelers to my area	20%
Increase in the number of business travelers to my area	12%
Decrease in the number of business travelers to my area	40%
Other	4%

During 2003 has the number of visitor inquiries about your area increased, decreased or stayed the same?

Response	Percent
Increased	57%
Decreased	15%
Stayed the same	28%

In what range does the portion of your budget devoted to tourism and packaged travel fall?

Response	Tourism	Packaged Travel
\$0 - \$25,000	8%	49%
\$25,001 - \$50,000	8%	19%
\$50,001 - \$100,000	11%	10%
\$100,001 - \$150,000	10%	7%
\$150,001 - \$200,000	5%	5%
\$200,001 - \$250,000	5%	2%
\$250,001 - \$300,000	8%	2%
\$300,001 - \$500,000	13%	4%
\$500,001 - \$1 million	14%	1%
More than \$1 million	20%	1%

How many years have you worked in the travel industry?

Response	DMOs
Average	13 years

Are you a:

Response	DMOs
U.S. member	89%
Canadian member	10%
Mexican member	0%
International Affiliate member	1%

Tour Suppliers

Was the number of customers you had during the second quarter of 2003 (April, May, June) greater than, less than or the same as the number of customers during the second quarter of 2002?

Response	Tour Suppliers
Greater than	28%
Less than	54%
Same	15%
Don't know	3%

Do you feel the number of customers during the third quarter of 2003 (July, August, September) will be greater than, less than or the same as the third quarter of 2002?

Response	Tour Suppliers
Greater than	33%
Less than	40%
Same	23%
Don't know	4%

Which of the following trends is your company experiencing?

Response	Tour Suppliers
Increase in cooperative marketing	41%
Increase in the number of leisure travelers	45%
Decrease in the number of leisure travelers	39%
Increase in the number of business travelers	17%
Decrease in the number of business travelers	31%

During 2003 has the number of customer inquiries increased, decreased or stayed the same?

Response	Tour Suppliers
Increased	35%
Decreased	29%
Stayed the same	36%

How many years have you worked in the travel industry?

Response	Tour Suppliers
Average	14 years

Are you a:

Response	Tour Suppliers
U.S. member	85%
Canadian member	14%
Mexican member	*
International Affiliate member	1%

* = less than 1%.