

NTA Member Needs Survey Results – December 2003

Responses Received: Tour Operators: 92 or 17%
Tour Suppliers: 220 or 12%
DMOs: 145 or 20%

Tour Operators

Was the number of passengers your company served during the third quarter of 2003 (July, Aug., Sept.) greater than, less than or the same as the third quarter of 2002?

Response	Tour Operators Passengers
Greater than	27%
Less than	44%
Same	29%

Was the number of departures your company had during the third quarter of 2003 (July, Aug., Sept.) greater than, less than or the same as the third quarter of 2002?

Response	Tour Operators
Greater than	23%
Less than	40%
Same	37%

Has your overall sales volume during the third quarter of 2003 (July, Aug., Sept.) been greater than, less than or the same as the third quarter of 2003? Why?

Response	Tour Operators
Greater than	26%
Less than	42%
Same	32%

Was the number of passengers your company served during the fourth quarter of 2003 (Oct., Nov., Dec.) greater than, less than or the same as the fourth quarter of 2002?

Response	Tour Operators
Greater than	44%
Less than	30%
Same	26%

Has your overall sales volume during the fourth quarter of 2003 (Oct., Nov., Dec.) been greater than, less than or the same as the fourth quarter of 2002?

Response	Tour Operators
Greater than	41%
Less than	29%
Same	30%

Was the number of departures your company had during the fourth quarter of 2003 (Oct., Nov., Dec.) greater than, less than or the same as the fourth quarter of 2002?

Response	Tour Operators
Greater than	34%
Less than	28%
Same	38%

During the first quarter of 2004 (Jan., Feb., March) do you expect your company's sales volume to be greater than, less than or the same as the first quarter of 2003?

Response	Tour Operators
Greater than	44%
Less than	16%
Same	40%

Top five selling destination for 2003.

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

Please rank the following governmental issues in order of their importance to your business with "1" being the most important issue and "11" being the least important issue.

Rank Item – Tour Operators	2003	2002	2001	2000
Traveler Safety and Security	1	2	3	3
Travel Industry Taxes and User Fees	2	1	4	8
Fair Labor Standards Act/Employee Classification Issues	3	n/a	n/a	n/a
Federal Land Issues (i.e. U.S. National Parks, Parks Canada, Forest Service, etc.)	4	7	9	7
State/Provincial Travel Laws and Regulations	5	3	5	4
Local/Municipal Tourism Regulations	6	6	10	6
Unfair Competition From the Public Sector	7	4	2	1
North American Border Crossing Issues	8	8	8	5
Americans with Disabilities Act	9	5	6	2
International Tourism Laws and Regulations	10	9	n/a	n/a
Environmental Impact/Protection	11	10	7	9

Which of the following sub-topics do you feel are especially important to tour operators regarding the American with Disabilities Act?

Response	Tour Operators
Employment Issues	16%
Accommodation of ADA Travelers	84%

Which of the following sub-topics do you feel are especially important to tour operators regarding Environmental Impact/Protection?

Response	Tour Operator
National Parks Preservation	45%
National Parks Transportation Issues	79%

Which of the following sub-topics do you feel are especially important to tour operators regarding Federal Land Issues?

Response	Tour Operators
Tour Operator Access Issues	77%
Entrance Fees	80%
National Parks Preservation/Protection	40%
Sustainable Tourism	42%
National Parks Transportation Issue	60%

Which of the following sub-topics do you feel are especially important to tour operators regarding International Tourism Laws and Regulations?

Response	Tour Operators
Sellers of Travel Laws Outside North America	42%
Visa/Entry/Exit Requirements	68%

Which of the following sub-topics to you feel are especially important to tour operators regarding Local/Municipal Tourism Regulations?

Response	Tour Operators
Taxation	66%
Motorcoach Restrictions	74%

Which of the following sub-topics do you feel are especially important to tour operators regarding North American Border Crossing?

Response	Tour Operators
U.S. - Canadian Border	80%
U.S. - Mexican Border	33%
NAFTA "Continuous Journey" Regulations/Tax Issues	34%

Which of the following sub-topics do you feel are especially important to tour operators regarding State/Provincial Travel Laws and Regulations?

Response	Tour Operators
State Sellers of Travel Laws	66%
Tax Issues	67%
Provincial Travel Taxes	46%

Which of the following sub-topics do you feel are especially important to tour operators regarding Traveler Safety and Security?

Response	Tour Operators
Department of Homeland Security Alerts/Recognition of Tourism Impacts	80%
DOT Regulations	51%
Terrorism	66 %
Airline Safety	55%
Natural Disasters, Disaster Preparedness	35%

Which of the following sub-topics do you feel are especially important to tour operators regarding Travel Industry Taxes and User Fees?

Response	Tour Operators
NPS Fees	53%
Local Taxes	54%
Fuel Taxes	60%
Accommodation Taxes	75%

Which of the following sub-topics do you feel are especially important to tour operators regarding Unfair Competition From the Public Sector?

Response	Tour Operators
Local Governments	65%
State/Provincial Governments	58%
Federal Governments	39%

During 2002, did you contact elected government officials on policy issues?

Response – Tour Operators	2003	2002	2001	2000
Yes, at the local level	28%	25%	28%	22%
Yes, at the state/provincial level	36%	31%	26%	27%
Yes, at the federal level	33%	26%	28%	26%
No, I did not contact government officials	42%	48%	54%	59%

How did you contact these officials?

Response – Tour Operators	2003	2002	2001	2000
In person	17%	16%	36%	38%
In writing	28%	26%	74%	73%
By telephone	22%	20%	48%	47%
By e-mail	25%	21%	41%	28%

What specific government relations topics or speakers would you suggest to benefit and educate NTA members?

Bill Clinton and Hillary Clinton.
Canadian border crossing regulations communicating with border officials lack of consistency of rules and regulations We need customs and INS to have a cooperative relationship with us, not antagonistic. We REALLY need one agent with whom we can communicate.
A strategy for contacting candidates in election years to win their support before being elected. Also, candidates are more accessible during campaign times than after being seated.
Update sellers of travel laws Information.
Small Business Association assistance and clarification of guidelines.
The differences between doing business domestically and internationally, now that we are global – for instance the EC Law, etc.
Labor issues.
Insurance reform.
Cuba travel.
How to get the attention of legislators to listen and support tourism.
National Park fees for Motorcoaches.
Non-profits, as they impact our business and what we can do about it.
Unfair competition by government entities like public land Commissions, ferry systems, railroads, CVBs etc.
Homeland Security and border crossing.
Fuel issues – costs are outrageous.
Department of Transportation inspections depends on which state you are in. New Jersey is company-

destructive in its policies, some of which are not backed by U. S. law

Bringing in groups from Poland.

Please describe other governmental issues of concern that were not mentioned in this survey, or that you believe the Government Relations Committee should address.

Push for a nationwide sellers of travel/consumer protection law to preempt inconsistent/unfair/burdensome individual state rules.

The only government entity I have been involved in NFIB and SBA. They both have been receptive and gracious, but not helpful to get me in newer direction.

The taxes on tourism are stifling. From government inspection fees, passenger facility charges, port taxes, occupancy taxes, sales taxes. All combined the taxes can add up to as much as 26 to 30 percent of a package.

Licensing laws - PUC - not enforced in Pennsylvania for motorcoach operators not licensed as tour operators and kitchen table operators not paying taxes.

Cooperative funding for tourism promotion.

Illinois has now begun to tax repair parts. We were tax-exempt before. Need to remain tax-exempt.

Fines for bus violations are exorbitant. Judges have very high money guidelines to follow. The enforcement is an egregious example of governmental "fund-raising"

DMOs

Was the number visitors to your area during the third quarter of 2003 (July, Aug., Sept.) greater than, less than or the same as the third quarter of 2002?

Response	DMOs
Greater than	43%
Less than	27%
Same	30%

Was the number of visitors to your area during the fourth quarter of 2003 (Oct., Nov., Dec.) greater than, less than or the same as the fourth quarter of 2002?

Response	DMOs
Greater than	37%
Less than	26%
Same	37%

Do you believe the number of visitors to your area during the first quarter of 2004 (Jan., Feb., March) will be greater than, less than or the same as the first quarter of 2003?

Response	DMOs
Greater than	37%
Less than	7%
Same	56%

Tour Suppliers

Was your number of customers during the third quarter of 2003 (July, Aug., Sept.) greater than, less than or the same as the third quarter of 2002?

Response	Tour Suppliers
Greater than	39%
Less than	35%
Same	26%

Was the number of customers during the fourth quarter of 2003 (Oct., Nov., Dec.) greater than, less than or the same as the fourth quarter of 2002?

Response	Tour Suppliers
Greater than	44%
Less than	27%
Same	29%

Do you believe the number of customers during the first quarter of 2004 (Jan., Feb., March) will be greater than, less than or the same as the first quarter of 2003?

Response	Tour Operators
Greater than	45%
Less than	19%
Same	36%

All Members

Using a five point scale where "1" is not at all valuable and "5" is extremely valuable, please rate the value of the following industry magazines to your business.

Response	Tour Operators	DMOs	Tour Suppliers
Courier	3.75	3.74	3.45
Destinations	3.44	3.57	3.29
Group Tour Magazine	3.32	3.46	3.27
Travel Weekly	3.04	2.48	2.55
Group Travel Leader	2.95	3.28	2.93
Tour Trade	2.78	2.17	2.34
Packaged Travel Insider	2.78	2.75	2.58
Leisure Travel News	2.73	2.88	2.64
Travel Trade	2.72	2.05	2.33
Travel Agent Magazine	2.59	2.06	2.29
Bank Travel	2.37	2.91	2.41
ASTA Agency Management	1.82	1.79	1.82

Do you read Courier magazine?

Response	Tour Operators	DMOs	Tour Suppliers
Yes	96%	92%	89%

Did you attend the 2003 NTA Annual Convention?

Response	Tour Operators	DMOs	Tour Suppliers
Yes	72%	87%	80%

Please rate the effectiveness of the pre-Convention communication tools using a 10 point scale where "1" is not at all effective and "10" is extremely effective.

Response	Tour Operators	DMOs	Tour Suppliers
Pre-Convention Newsletters	7.3	7.4	7.3
Pre-Convention Issue of Courier	7.2	7.3	6.9
Pre-Convention Web Casts	6.1	6.7	6.5
Pre-Convention E-mail Updates	7.7	8.0	7.8
Information Provided On NTA Online	7.6	8.4	8.2

How prepared do you feel you were for the new format changes to the 2003 NTA Annual Convention?

Response	Tour Operators	DMOs	Tour Suppliers
Extremely Prepared	26%	19%	20%
Very Prepared	31%	47%	42%
Somewhat Prepared	37%	33%	33%
Not Very Prepared	6%	1%	4%
Not At All Prepared	0%	0%	1%

The frequency of information NTA sent you prior to Convention was:

Response	Tour Operators	DMOs	Tour Suppliers
Too much	20%	27%	24%
About right	75%	72%	74%
Too little	5%	1%	2%

How many years have you worked in the travel industry?

Response	Tour Operators	DMOs	Tour Suppliers
Average	20 years	14 years	14 years

Please indicate the size of your company.

Response	Tour Operators
Annual sales less than \$1 million	31%
Annual sales \$1 million to \$3 million	32%
Annual sales \$3 million to \$5 million	14%
Annual sales \$5 million to \$7 million	10%
Annual sales more than \$7 million	13%

Is your company a:

Response	Tour Operators	DMOs	Tour Suppliers
U.S. member	93%	88%	84%
Canadian member	6%	11%	16%
Mexican member	0%	0%	0%
International member	1%	1%	0%

Please indicate your gender.

Response	Tour Operators	DMOs	Tour Suppliers
Female	56%	77%	69%
Male	44%	23%	31%

What is your age?

Response	Tour Operators	DMOs	Tour Suppliers
18-24	0%	1%	2%
25-29	0%	8%	11%
30-34	1%	15%	10%
35-39	6%	10%	15%
40-44	8%	15%	17%
45-49	14%	15%	16%
50-54	21%	17%	12%
55-59	22%	10%	11%
60-64	18%	6%	5%
65 or older	10%	3%	2%