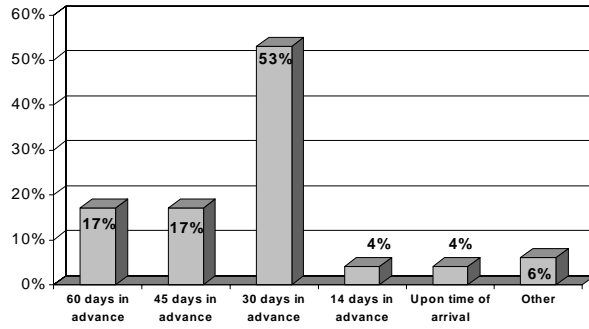
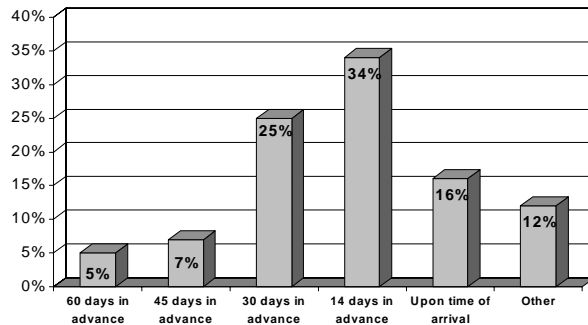


Reasonable Timeframe to Request **Full** Refund
(Receptive/Sightseeing Company)



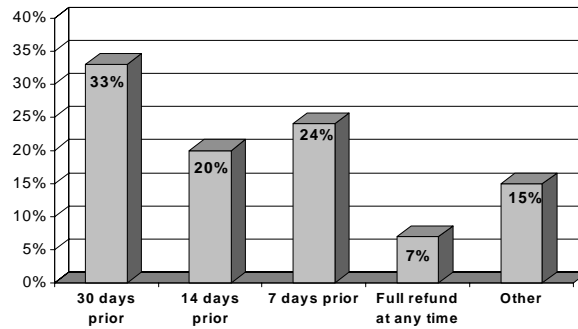
As for receiving a partial refund, 47 percent of tour operators believe a reasonable timeframe for cancellation with a partial refund would be 14 days in advance of arrival with 29 percent stating the day of arrival. For the receptive, 34 percent agree with the tour operators, with 25 percent stating a 30 days prior to arrival to be optimal.

Reasonable Timeframe to Request **Partial** Refund
(Receptive/Sightseeing Company)



The view on when an entire deposit becomes non-refundable is split for receptives. While 33 percent state 30 days prior to departure, 24 percent believed seven days prior was appropriate, closely followed by 20 percent stating 14 days as more reasonable.

**When Entire Deposit Becomes Non-Refundable
(Receptive/Sightseeing Company)**



Tiered Pricing:

Seventy-nine percent of receptives offer tiered pricing with 94 percent offering such pricing to tour operators and providing them with the best price on the tier.

To Whom Receptive/Sightseeing Companies Offer Tiered Pricing

	Offer Tiered Pricing	Price Rank
Professional Tour Operators	94%	#1
Group Leaders	58%	#4
General Public	25%	#5
Travel Agents	44%	#3
Receptive Operators	63%	#2

Other Information:

Other facts learned from NTA receptive/sightseeing members are that 78 percent maintain professional liability “errors and omissions” insurance, 62 percent communicate updated rate schedules whenever they occur and 82 percent provide in-house training to their staff on the travel industry.

In order to attract business, 65 percent of receptive members list their company in both city and state/provincial DMO group tour manuals. Receptive/sightseeing companies offer a great deal of services to tour operators. The following list shows the percentage of NTA receptive/sightseeing members who offer these many services to tour operators.

Services Offered by NTA Receptive/Sightseeing Company Members

Services Offered	
Meals	98%
Attractions	97%
Hotel accommodations	97%
City tours	94%
Custom tours	94%
Step-on guide service	94%
Baggage handling	92%
Meet and greet services	92%
Entertainment	89%
Inclusive land packages	87%
Itinerary planning/suggestions	87%
Special interest tours	87%
Airport transfers	81%
Boat tours	81%
Charter coach services	79%
FAM Tours	79%
Site inspection	74%
Catered functions	73%
Walking tours	68%
Multi-lingual guides	64%
Convention services	61%
Incentive tours	56%
Group photos	50%
Carriage rides	48%
Study tours	47%
Cruises	42%
Limousine services	42%
Intermodal tours	37%
Van services	37%
Car rentals	29%
Winter skiing or snowmobiling	19%
Coordination and secretarial services	13%
Motor home rentals	3%

Finally, when asked to rank the benefits of using a receptive operator, receptives ranked knowledge of local market as the number one benefit for tour operators to utilize their company. Following on that list, in order, were guarantee of performance, convenience, efficiency, cost savings and tour supplier contacts.

However, when tour operators were asked the reasons they do utilize a receptive, 87 percent stated product knowledge, 66 percent enjoyed the ease of packaging, 56 percent reported time considerations and 41 percent stated cost effectiveness. In addition, 71 percent of tour operators stated that they will sometimes utilize guide services regardless of whether or not a

package is purchased. When asked if they would be willing to have a receptive company combine their tour with another tour operators' clients, 59 percent of operators said "no."

Conversely, when tour operators were asked the reasons they did not utilize a receptive, the no. 1 reason was that they preferred dealing with tour suppliers directly (50 percent) followed by expense (22 percent). Eight percent of tour operators responding did not clearly understand the service provided by receptives.

Forward Together – Tour Operators and Restaurants

Level of Interaction:

According to the survey, 94 percent of tour operators do business with restaurants. NTA member restaurants report 19 percent of their business is derived from the packaged travel market with 30 percent of this packaged travel business coming from NTA tour operators. Additionally, NTA restaurant members report that 82 percent of their business in the packaged travel market is derived from group tours and 18 percent from independent packages. (See appendix A.)

Booking Timelines:

When asked about a preferred booking timeline for group business, 24 percent of member restaurants would prefer bookings three to five months in advance with 18 percent preferring both 30 days and six months in advance.

Actual bookings for group business is as varied as the preferred with the percentages mirroring those of the preferred.

Booking Timelines for Group Tours

	Preferred	Actual
14 days in advance	12%	12%
30 days in advance	18%	18%
45 days in advance	6%	6%
60 days in advance	12%	12%
3 to 5 months in advance	24%	24%
6 months in advance	18%	18%
1 year in advance	0%	0%
Other	12%	12%

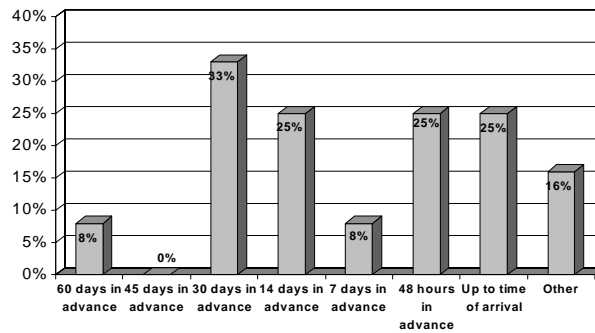
Deposits, Payments and Refunds:

Fifty-six percent of restaurants require a signed contract from tour operators with 50 percent requiring a deposit at an average amount of \$175. Tour operators reported that a reasonable time frame for a restaurant to expect a deposit was 30 days in advance (39 percent) with 32 percent stating a preference for direct bill as opposed to any form of deposit.

As for receiving full payment, an overwhelming 70 percent of restaurants require payment on the day of arrival.

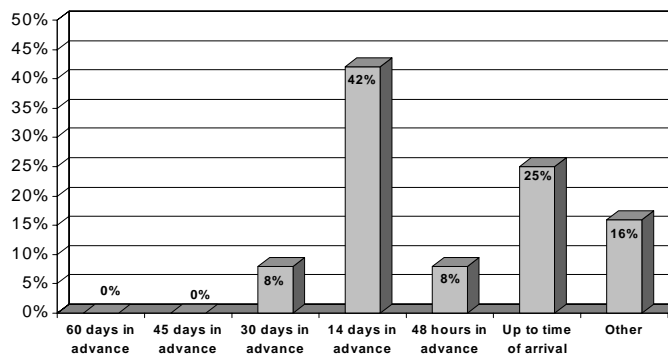
Eighty-one percent of member restaurants report providing refunds to tour operators. Tour operators report that, if a tour is not going to operate, more than half (52 percent) will cancel 30 days prior to arrival. Additionally, 38 percent of tour operators believe that is also a reasonable timeframe for receiving a full refund. Thirty-three percent of restaurants agree on this timeframe for a full refund with 25 percent stating both a 14-day and 48-hour advance notice as preferable.

Reasonable Timeframe to Request **Full** Refund
(Restaurant)



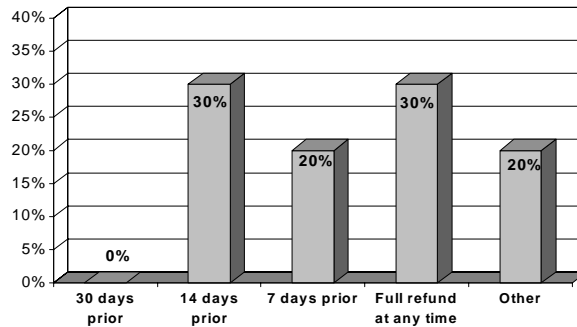
As for receiving a partial refund, 47 percent of tour operators believe a reasonable timeframe for cancellation with a partial refund would be up to the day of arrival with 31 percent stating 14 days advance notice as fair. For the restaurant, 42 percent would prefer at least a 14-day advance notice with 25 percent accepting the day of arrival for a partial refund.

Reasonable Timeframe to Request **Partial** Refund
(Restaurant)



The view on when an entire deposit becomes non-refundable is split for restaurants. While 30 percent state both 14 days prior to departure and refunds at any time, 20 percent believe both seven days notice as well as other timeframes are more reasonable.

When Entire Deposit Becomes Non-Refundable (Restaurant)



Volume/Tiered Pricing:

Seventy percent of member restaurants offer volume discounts to tour operators. Among those offering volume discounts, they consider an average of 13 tours and/or 148 people as sufficient to constitute such a discount.

Conversely, only 31 percent of restaurants offer tiered pricing with all of them (100 percent) offering such pricing to tour operators and providing them with the best price on the tier.

To Whom Restaurants Offer Tiered Pricing

	Offer Tiered Pricing	Price Rank
Professional Tour Operators	100%	#1
Group Leaders	60%	#3
General Public	80%	#5
Travel Agents	80%	#4
Receptive Operators	80%	#2

Other Information:

Other facts learned from NTA restaurant members are that 60 percent do not maintain professional liability “errors and omissions” insurance, 56 percent communicate updated rate schedules whenever they occur and 44 percent provide this information annually.

In order to attract business, 64 percent of restaurant members list their company in both city and state/provincial DMO group tour manuals.

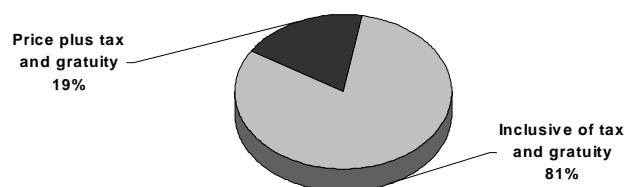
To attract group tour business, 67 percent of restaurants offer complimentary meals for both tour directors and drivers. This is consistent with tour operator preferences as 73 percent of tour operators surveyed stated tour director and driver as the preferred recipients of complimentary meals.

No NTA member restaurant reported a holding fee charge if a group arrives later than the time designated and 39 percent will hold table 30 minutes past the reserved time for late arrivals. Additionally, 89 percent of member restaurants provide seating in a reserved area in the public dining room for groups with 56 percent having private dining areas. When tour operators were asked about their clients' dining preferences, 67 percent stated that it depended on the group with 17 percent reporting that public dining areas are preferable.

As an added convenience, 27 percent of restaurants require menu selection 48 hours in advance of arrival with 20 percent asking for two weeks advance notice. Additionally, 20 percent of tour operators reported a one-week advance notice of menu selections followed by 17 percent providing 48-hour notice and 16 percent giving restaurants a 72-hour notice.

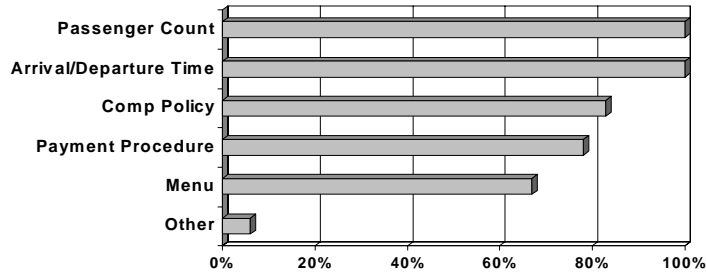
Twenty-eight percent of the restaurants surveyed expect payment in the form of a check at the end of the meal, with 26 percent accepting credit cards and 21 percent asking for the meal to be prepaid. When receiving pricing from the restaurant, 81 percent of tour operators prefer a price that is inclusive of tax and gratuity.

Tour Operators' Preference for Pricing from Restaurants

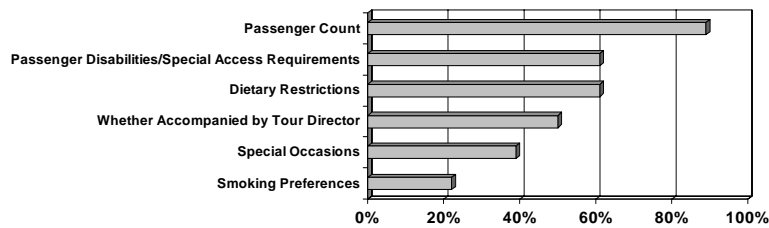


The following are charts detailing items that both the restaurant and the tour director should know prior to arrival to make the group's visit the best possible:

What the Tour Director is Expected to Know Prior to the Groups' Arrival



What the Restaurant is Expected to Know Prior to the Groups' Arrival



A variety of options are important, as tour operators receive a number of alternative menu requests from their clients. Half of tour operators surveyed (50 percent) report that 1 to 9 percent of their clients request alternative menus with 21 percent stating the percentages to be between 10 and 25 percent.

The following chart describes some of these menus and the percentage of requests received. The average number of clients who request alternative menu choices is 5 percent.

NTA member restaurants also offer a variety of food services as well as menu selections, as detailed in the charts below.

Types of Food Services Provided by NTA Restaurant Members

