Tour operators were also surveyed on their preference for breakfast, lunch and dinner menus as to whether they are pre-set menus or provide the option of entrée choices. The following are the average results from the tour operator survey where a rating of **five** is **prefer** and **one** is **do not prefer**:

Meal Preferences by Tour Operator Customers

Meal Type	Average
Breakfast – buffet	4.5
Breakfast – choice of three entrees	3.2
Breakfast – choice of two entrees	2.9
Breakfast – choice of four to six entrees	2.8
Breakfast – a la carte	2.4
Breakfast – set menu	2.3
Lunch – buffet	4.0
Lunch – choice of three entrees	3.6
Lunch – choice of two entrees	3.3
Lunch – choice of four to six entrees	2.8
Lunch – set menu	2.5
Lunch – a la carte	2.4
Dinner – choice of three entrees	4.0
Dinner – choice of four to six entrees	4.0
Dinner – buffet	3.4
Dinner – choice of two entrees	3.2
Dinner – set menu	2.5
Dinner – a la carte	2.4

With buffet being the most preferred by tour operators for both breakfast and lunch and 50 percent of NTA member restaurants offering buffet services, the two should be able to work together on successful group meals. For dinner, 83 percent of restaurants offer menu service with 39 percent offering pre-select three entrees. Again, a good match for NTA tour operator preferences.

Appendix A

Packaged Travel Market

Percentage of Business Derived from Packaged Travel Market:

	Hotel	Attraction	Receptive	Restaurant	Casino	Motorcoach Company	Railroad	Passenger Vessel
Average	27%	29%	76%	19%	20%	43%	31%	30%

Percentage of Business Derived From Packaged Travel Market That is in the Form of Group Tours and Independent Packages

	Hotel	Attraction	Receptive	Restaurant	Casino	Motorcoach Company	Railroad	Passenger Vessel
Group Tours	73%	71%	86%	82%	67%	--	90%	81%
Independent Packages	27%	29%	14%	18%	33%	--	10%	19%

Percentage of Packaged Tavel Business That is From NTA Tour Operators

	Hotel	Attraction	Receptive	Restaurant	Casino	Motorcoach Company	Railroad	Passenger Vessel
Average	27%	29%	35%	30%	18%	14%	16%	35%

Tiered Pricing

Percentage of Members Who Offer Tiered Pricing

	Hotel	Attraction	Receptive	Restaurant	Casino	Motorcoach Company	Railroad	Passenger Vessel
Yes	59%	49%	79%	31%	41%	62%	75%	77%
No	41%	51%	21%	39%	59%	38%	25%	23%

Groups For Which Tiered Pricing is Offered

	Hotel	Attraction	Receptive	Restaurant	Casino	Motorcoach Company	Railroad	Passenger Vessel
Professional Tour Operators	90%	89%	94%	100%	91%	54%	100%	90%
Group Leaders	63%	58%	58%	60%	73%	23%	33%	90%
General Public	39%	28%	25%	60%	46%	15%	33%	70%
Travel Agents	40%	42%	44%	80%	46%	23%	100%	60%
Receptive Operators	81%	73%	63%	80%	55%	62%	67%	90%
Other	5%	14%	8%	0%	9%	0%	0%	0%

Ranked Order of Tiered Pricing (#1 being the best price)

	Hotel	Attraction	Receptive	Restaurant	Casino	Motorcoach Company	Railroad	Passenger Vessel
Professional Tour Operators	#1	#2	#1	#1	#1	#1	#1	#2
Group Leaders	#3	#4	#4	#3	#3	#4	#4	#4
General Public	#5	#5	#5	#5	#5	#5	#5	#5
Travel Agents	#4	#3	#3	#4	#4	#3	#2	#3
Receptive Operators	#2	#1	#2	#2	#2	#2	#3	#1

System Used to Store or Maintain Leads

	Hotel	Attraction	Receptive	Restaurant	Casino	Motorcoach Company	Railroad	Passenger Vessel
Computerized system	46%	62%	55%	47%	48%	54%	75%	57%
Manual system	16%	8%	6%	12%	11%	0%	25%	7%
Both	38%	20%	39%	41%	41%	46%	0%	36%

Preference for Receiving Leads From DMOs

	Tour Operator	Hotel	Attraction	Receptive	Restaurant	Casino	Motorcoach Company	Railroad	Passenger Vessel
Mail	57%	47%	48%	48%	50%	63%	38%	50%	29%
E-mail	54%	75%	73%	66%	78%	85%	15%	25%	79%
In person	19%	26%	23%	19%	33%	26%	15%	75%	14%
Disk	11%	17%	19%	16%	17%	18%	0%	50%	7%
Fax	40%	64%	33%	52%	56%	59%	54%	50%	43%
Other	3%	6%	5%	3%	0%	4%	0%	0%	0%

Effectiveness Ratings for Marketing Tools Used to Reach Tour Operators:

	Tour Operator	Hotel	Attraction	Receptive	Restaurant	Casino	Motorcoach Company	Railroad	Pass. Ves.	DMO
Brochures	**4.1**	3.8	4.1	3.9	3.8	3.8	3.5	3.8	4.2	4.1
Co-op advertising	**3.2**	3.8	3.5	3.4	3.1	3.4	2.0	3.0	4.1	3.7
Courier	**3.2**	2.5	2.6	1.9	3.7	3.0	3.3	2.0	2.9	3.1
Direct mail	**3.8**	3.6	4.0	3.8	3.3	4.4	4.2	3.3	3.3	3.8
Domestic trade shows	**3.4**	3.9	3.9	3.8	4.1	3.8	4.1	4.0	3.7	4.2
E-mail	**3.1**	3.4	3.3	3.1	3.1	3.1	4.1	2.3	3.3	3.4
FAM tours	**3.9**	3.7	4.0	3.5	3.6	3.0	3.7	3.3	3.5	4.1
Group tour manuals	**4.3**	3.2	3.6	3.2	3.4	3.0	4.2	2.3	3.1	4.3
In-person sales calls	**3.2**	4.0	4.2	4.3	3.9	3.3	4.3	4.0	3.3	3.9
International trade shows	**2.4**	3.4	3.3	3.3	3.2	2.9	4.5	3.3	2.4	3.4
NTA Annual Convention	**4.0**	3.9	4.1	3.8	4.5	3.8	4.7	4.3	4.1	4.4
NTA Convention Daily Newsletter	**3.1**	2.1	2.4	2.2	3.0	2.8	--	3.0	1.8	2.4
NTA Online	**2.9**	2.7	2.3	2.6	3.1	2.9	3.7	--	2.5	3.0
Other associations publications	**3.0**	2.9	3.1	2.9	2.9	3.2	3.3	2.0	2.8	3.2
Slides	**2.8**	2.9	3.0	2.2	2.8	2.5	3.0	3.3	2.8	3.1
Sponsorships	**2.8**	2.6	3.0	2.6	2.9	3.3	4.0	2.0	2.6	3.0
Telemarketing	**2.1**	3.1	3.3	3.0	2.6	3.1	3.7	2.5	2.4	2.6
Videos	**3.3**	2.8	3.5	2.7	3.0	2.8	--	2.7	3.3	3.3
Web site banner advertising	**2.2**	2.8	2.8	2.6	3.3	3.3	--	2.5	2.8	2.7
Your Web site	**3.1**	3.9	4.0	3.8	3.7	3.8	3.7	4.5	4.2	4.2

Appendix B – Demographic Data

Region Company or Organization is Located

	Tour Operator	DMO	Hotel	Attraction	Receptive	Restaurant	Casino	Motorcoach Company	Railroad	Passenger Vessel
United States	**92%**	**91%**	**81%**	**85%**	**88%**	**100%**	**82%**	**77%**	**100%**	**93%**
Midwest *(Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin)*	32%	32%	12%	28%	15%	13%	37%	8%	0%	21%
New England *(Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont)*	8%	7%	6%	6%	10%	0%	4%	0%	0%	14%
Middle Atlantic *(New Jersey, New York, Pennsylvania)*	13%	3%	8%	14%	18%	20%	7%	0%	50%	0%
South Atlantic *(D.C., Delaware, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia)*	10%	16%	17%	14%	17%	13%	4%	23%	0%	14%
East South Central *(Alabama, Kentucky, Mississippi, Tennessee)*	4%	8%	4%	4%	8%	0%	15%	0%	0%	7%
West South Central *(Arkansas, Louisiana, Oklahoma, Texas)*	6%	7%	5%	4%	5%	27%	4%	0%	25%	7%
West *(Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming)*	19%	18%	27%	17%	12%	27%	22%	46%	25%	0%

	Tour Operator	DMO	Hotel	Attraction	Receptive	Restaurant	Casino	Motorcoach Company	Railroad	Passenger Vessel
Canada	**8%**	**9%**	**19%**	**15%**	**12%**	**0%**	**8%**	**15%**	**0%**	**7%**
Atlantic Canada *(Newfoundland and Labrador, Nova Scotia, Prince Edward Island, New Brunswick)*	2%	2%	0%	1%	3%	0%	0%	0%	0%	7%
Quebec	0%	1%	4%	2%	3%	0%	0%	0%	0%	0%
Ontario	2%	2%	5%	6%	7%	0%	4%	0%	0%	7%
The Prairies *(Manitoba, Saskatchewan)*	1%	2%	1%	1%	0%	0%	4%	0%	0%	0%
The Mountains and the West Coast *(Alberta, British Columbia)*	3%	1%	9%	5%	2%	0%	0%	15%	0%	0%
Northern Canada *(Yukon, Northwest Territories)*	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%
Mexico	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**8%**	**0%**	**0%**

Average Number of Years NTA Members Have Worked in/with the Travel Industry

	Tour Operator	DMO	Hotel	Attraction	Receptive	Restaurant	Casino	Motorcoach Company	Railroad	Passenger Vessel
Average	20	13	15	12	21	12	11	20	15	14

Gender of NTA Members

	Tour Operator	DMO	Hotel	Attraction	Receptive	Restaurant	Casino	Motorcoach Company	Railroad	Passenger Vessel
Female	55%	79%	76%	73%	69%	71%	81%	50%	50%	67%
Male	45%	21%	24%	17%	31%	29%	19%	50%	50%	33%

Age of NTA Members

	Tour Operator	DMO	Hotel	Attraction	Receptive	Restaurant	Casino	Motorcoach Company	Railroad	Passenger Vessel
18 to 24	1%	2%	1%	2%	0%	6%	4%	0%	0%	0%
25 to 29	1%	9%	11%	11%	0%	18%	8%	0%	0%	17%
30 to 34	6%	14%	15%	17%	11%	0%	19%	17%	0%	25%
35 to 39	7%	11%	16%	16%	8%	6%	23%	17%	25%	25%
40 to 44	11%	19%	20%	12%	16%	23%	19%	0%	0%	8%
45 to 49	15%	16%	8%	13%	16%	23%	12%	8%	0%	8%
50 to 54	16%	15%	16%	12%	14%	6%	8%	33%	25%	8%
55 to 59	19%	7%	10%	10%	14%	6%	8%	17%	25%	0%
60 to 64	17%	6%	2%	7%	10%	0%	0%	8%	25%	8%
65 or older	7%	1%	2%	1%	10%	12%	0%	0%	0%	0%

Appendix C – Tour Operator Data

Average Consumer Booking Timelines

	Before Sept. 11	After Sept. 11
14 days in advance	1%	8%
30 days in advance	2%	11%
45 days in advance	5%	8%
60 days in advance	10%	14%
3 to 5 months in advance	35%	15%
6 months in advance	28%	6%
1 year in advance	--	1%
Other	13%	2%
Not applicable	1%	35%

When 2003 Domestic Packages are Planned and Purchased

	Plan	Purchase
Winter 2001 (Jan., Feb., March)	2%	2%
Spring 2001 (April, May, June)	4%	2%
Summer 2001 (July, Aug., Sept.)	4%	3%
Fall 2001 (Oct., Nov., Dec.)	2%	5%
Winter 2002 (Jan., Feb., March)	20%	16%
Spring 2002 (April, May, June)	30%	23%
Summer 2002 (July, Aug., Sept.)	24%	27%
Fall 2002 (Oct., Nov., Dec.)	13%	22%

When 2003 International Packages are Planned and Purchased

	Plan	Purchase
Winter 2001 (Jan., Feb., March)	3%	2%
Spring 2001 (April, May, June)	5%	3%
Summer 2001 (July, Aug., Sept.)	1%	3%
Fall 2001 (Oct., Nov., Dec.)	7%	6%
Winter 2002 (Jan., Feb., March)	30%	16%
Spring 2002 (April, May, June)	27%	30%
Summer 2002 (July, Aug., Sept.)	23%	20%
Fall 2002 (Oct., Nov., Dec.)	4%	20%

Company Size by Annual Sales

Less than $1 million	25%
$1 million to $3 million	43%
$3 million to $5 million	13%
$5 million to $7 million	7%
More than $7 million	12%

Percentage of Sales Volume

Group Tours	87%
Independent Packages	13%
Other	0%

Scheduled vs. Customized Tours

Customized/Preformed	49%
Scheduled/Published	51%

Percentage of Customers That are the Following Ages

Student	16%
Young Adult (21 – 34)	3%
Baby Boomer (35 – 53)	9%
Future Senior (54 – 64)	22%
Senior (65 and older)	50%

Percentage of Sales Volume

Group Leaders	31%
Travel Agents	9%
Other Tour Operators	11%
Direct to Consumers	46%
Other	3%

Percentage of NTA Tour Operators Who Offer Domestic vs. International Packages

Domestic only	39%
Domestic and International	61%

Percentage of NTA Tour Operators Who Offer International Inbound vs. International Outbound

Inbound	20%
Outbound	53%

Appendix D - Methodology

Through an initiative NTA is calling Forward Together, every individual member category was sent a survey in March 2002 in regards to their particular business, their policies and practices, what they can provide, and what they need most from other NTA members – helping to identify areas with great potential for successful partnerships between various NTA member segments.

Because the surveys were rather long, as an added incentive, NTA held a drawing for a complimentary DMO registration, a complimentary tour supplier registration and two complementary tour operator registrations to the 2002 NTA Annual Convention. To be eligible, NTA members had to return the completed survey and postcard by the survey deadline.

Surveys were sent to 3,668 NTA members. The members were instructed to fill out the survey and return it in a postage paid reply envelope to NTA Headquarters.

Two weeks after the initial mailing a mass fax was sent to all members reminding them to fill out and return their survey. After the initial deadline of April 8, an additional mass fax was sent to all members extending the deadline to receive completed surveys to April 15.

Data entry for the tour operator, DMO, hotel, attraction, and receptive/sightseeing surveys were completed by Lexington Opinion Research. The research firm then ran tabulations for the completed questionnaires. Due to the small respondent base, data entry and tabulations for casinos, motorcoach companies, passenger vessels, railroads and restaurants was completed by NTA staff

The final number of members responding to the surveys was 1,031, for an overall response rate of 28 percent.

Forward Together Surveys Response Rate by Member Category

	Surveys Mailed	Surveys Returned	Response Rate
Tour Operator	642	253	39%
DMO	798	307	38%
Airline	3	1	33%
Attraction	634	135	21%
Casino	66	27	41%
Hotel	1,050	198	19%
Motorcoach Company	66	13	20%
Passenger Vessel	70	13	19%
Railroad	11	4	36%
Receptive/Sightseeing	179	62	35%
Restaurant	84	18	21%
Total	3,668	1,031	28%