

USTOA 2022

Reimagining the next 50 years

Introduction

USTOA has once again embarked on a critically important project for your Association. We have commissioned PwC to conduct our fourth Economic Impact Study of our Active Members to determine our economic footprint which will touch every element of programming moving forward – from advocacy in our nation's capitol to speaking with an authoritative voice with the consumer and trade media. We thank you in advance for taking the time to participate.

This survey should take approximately 15 minutes to complete. We would greatly appreciate receiving your response as soon as possible and before the closing date on 16 September.

This year's research will have a smaller focus on economic metrics and more on the challenges and opportunities facing your organization.

We have included a link to the PDF of the survey, allowing you to share with others in your organization if needed before completing the survey online.

This survey is being conducted independently by PwC in accordance with the Market Research Society Code of Conduct, which guarantees your confidentiality and anonymity. Your individual response will not be shared with anyone outside of PwC.

Completing the survey

The 'Back' and 'Next' buttons at the bottom of each screen allow you to navigate through the survey. Please note that using the web browser's 'back' button will take you out of the survey without saving your answers.

Some screens may require you to use the scroll bar at the right-hand side of the screen in order to move down the page and answer the rest of the question. The navigation buttons will be located at the end of each set of questions.

It is best to complete the survey in one sitting. However, if you need to save your questionnaire and return to it later, please do so by simply closing your browser window, this will save all responses previously submitted. To restart the survey please click on the link included in your email message. The survey will open at the last question submitted.

As a security feature the survey will 'time-out' if any page is left inactive for more than 20 minutes. To access the survey again, please click on the link sent to you via email.

About your corporation

The first set of questions will require you to provide some information about yourself and your corporation.

Q1) Please confirm your name, position and email address within your corporation.
Please record response in the boxes provided

Name:	
Position:	
Email:	

Q3) Please confirm the name of the corporation you will be completing this survey on behalf of below.
Please select ONE only

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Abercrombie & Kent USA, LLC	1	HollandAmerica Group	25
Adventures by Disney	2	Homeric Tours, Inc.	26
AHI International	3	Hotelbeds USA	27
Alexander+Roberts	4	Hurtigruten	28
ALG Vacations Corporation	5	Intrepid Group	29
Amawaterways	6	Lindblad Expeditions	30
American Council for International Studies	7	Perillo Tours	31
Audley Travel	8	Pleasant Holidays LLC	32
Avanti Destinations	9	Premier World Discovery	33
Celtic Tours World Vacations	10	Railbookers Group	34
CIE Tours International	11	Ritz Tours	35
Classic Vacations	12	Scenic Tours inc. Mayflower Cruises & Tours, Emerald Cruises, Scenic Luxury Cruises & Tours	36
Club Adventures by AAA Exclusive Vacations	13	Sky Vacations	37
Collette	14	SITA World Tours	38
CroisiEurope America	15	smarTours LLC	39
Delta Vacations	16	Swain Destinations	40
DH Enterprise & Associates Inc.	17	Tauck	41
Down Under Answers	18	The Travel Corporation USA	42
EF Institute for Cultural Exchange	19	Travelopia USA	43 Go to Q3.1
Flight Centre Travel Group	20	USA Gateway Inc. dba Majestic Vacations	44
Gate 1 Travel	21	Viking Cruises	45
Globus Family of Brands	22	Windstar Cruises	46
Goway Travel, Inc.	23	WorldStrides	47
Grand Circle	24	Xanterra Leisure Resort Holdings- incl. Country Walkers, Holiday Vacations, VBT Bicycling Vacations	48

Q3.1) [If selected option 43, 'Travelopia USA' at Q3] Please confirm the name of the Travelopia USA brand(s) you will be completing this survey on behalf of.
Please select ALL that apply

Brian Moore International Tours	1
Enchanting Travels	2
Europe Express	3
Exodus travels	4
Go-today.com	5
Le Boat	6
Quark Expeditions	7
Sunsail	8
TCS Expeditions	9
The Moorings	10
YMT Vacations	11

If part of Travelopia USA, please note: For the remaining questions in this survey, please complete them at an overall level for the brands you have just selected.

Q4) Please indicate the region/ country your corporation is headquartered in.

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Please select ONE only

		Routing
United States (including Puerto Rico and the U.S. Virgin Islands)	1	Go to Q4.1
Canada	2	Skip to Q5
Mexico	3	
Caribbean	4	
Europe	5	
Middle East & Africa	6	
South America	7	
Asia Pacific	8	

Q4.1) [If selected 'United States (including Puerto Rico and the U.S. Virgin Islands)' at Q4] You indicated your corporate headquarters are based in the United States, Puerto Rico or the U.S. Virgin Islands. Please select the state/unincorporated territory your headquarters is based in.

Please select ONE only

		US Division			US Division
Alabama	1	South	Nebraska	28	Mid West
Alaska	2	West	Nevada	29	West
Arizona	3	West	New Hampshire	30	North East
Arkansas	4	South	New Jersey	31	North East
California	5	West	New Mexico	32	West
Colorado	6	West	New York	33	North East
Connecticut	7	North East	North Carolina	34	South
Delaware	8	South	North Dakota	35	Mid West
District of Columbia	9	South	Ohio	36	Mid West
Florida	10	South	Oklahoma	37	South
Georgia	11	South	Oregon	38	West
Hawaii	12	West	Pennsylvania	39	North East
Idaho	13	West	Puerto Rico	40	South
Illinois	14	Mid West	Rhode Island	41	North East
Indiana	15	Mid West	South Carolina	42	South
Iowa	16	Mid West	South Dakota	43	Mid West
Kansas	17	Mid West	Tennessee	44	South
Kentucky	18	South	Texas	45	South
Louisiana	19	South	U.S. Virgin Islands	46	South
Maine	20	North East	Utah	47	West
Maryland	21	South	Vermont	48	North East
Massachusetts	22	North East	Virginia	49	South
Michigan	23	Mid West	Washington	50	West
Minnesota	24	Mid West	West Virginia	51	South
Mississippi	25	South	Wisconsin	52	Mid West
Missouri	26	Mid West	Wyoming	53	West
Montana	27	West			

The economic impact

This section will require you to provide economic information about **your corporation**. All responses should be answered at the corporate level.

The purpose of this section is to compare pre and post pandemic key metrics.

Please provide your actual metrics recorded for the **year ending 2019** as well as your projecting metrics for the **current year (2022)**

Q5) Please provide, to the best of your ability, the following information in relation to your corporation

*Please record your response in the boxes provided
Please record your response to the nearest whole number and do not enter any commas or decimal points*

	Actual for year ending 2019	Projected for year ending 2022
Total number of packages sold		
Total number of individual travelers		
Revenues generated from all travel categories offered (\$)		
Purchases of Goods & Services for Travel Packages (\$)		
Percentage of Packages sold through Travel Agencies		
Total employment within the U.S.		

Q6) Please calculate the estimated percentage contribution from each revenue category to the Total Revenues for the year ending 2019 and the projected contribution for the year ending 2022.

*Please record your response in the boxes provided
Please record your response to the nearest whole number and do not enter any commas or decimal points*

	Percentage contribution for year ending 2019 (%)	Projected percentage contribution for year ending 2022 (%)
Student travel	%	%
Escorted/Guided tours	%	%
FIT packages	%	%
Custom packages	%	%
Cruises	%	%
Other (please specify)	%	%
TOTAL	100%	100%

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Q7a) Do you anticipate a growth in sales volumes for the year ending 2023?

Please select ONE only

Yes, we anticipate an significant growth in sales (More than 10%)	1
Yes, we anticipate an optimistic growth in sales (7 to 9%)	2
Yes, we anticipate a cautiously optimistic growth in sales (4 to 6%)	3
Yes, we anticipate a stable growth in sales (1 to 3%)	4
No, we anticipate there will be no change	5
No, we anticipate a decrease in sales	6

Q7b) Do you anticipate a growth in passenger volumes for the year ending 2023?

Please select ONE only

Yes, we anticipate an significant growth in passengers (More than 10%)	1
Yes, we anticipate an optimistic growth in passengers (7 to 9%)	2
Yes, we anticipate a cautiously optimistic growth in passengers (4 to 6%)	3
Yes, we anticipate a stable growth in passengers (1 to 3%)	4
No, we anticipate there will be no change	5
No, we anticipate a decrease in passengers	6

Q7c) Has the cost of travel packages increased/decreased since the beginning of the pandemic in 2020?

Please select ONE only

Increased more than 50%	1
Increased 25% to 49%	2
Increased 10% to 24%	3
Increased 1 to 9 %	4
No, we anticipate there will be no change	5
No, we anticipate a decrease in price	6

Travel trends - Challenges and opportunities facing the industry

Q8.1) What “off-the-beaten path” countries do you foresee becoming popular for travelers in 2022/2023?

Q8.2) What “Hot Destinations” countries do you foresee becoming popular for travelers in 2022/2023?

*Please record your response in the boxes provided.
Please rank based on popularity where ‘1’ will be the most popular in decreasing order to the 5th most popular destination.*

Rank	Q27.1 Off the beaten path	Q27.2 Hot Destinations
1		
2		
3		
4		
5		

Q9a) What categories of “experiential travel” programs do you currently offer?
Please select ALL that apply

	Adventure	<input type="checkbox"/> 1
	Art & Culture	<input type="checkbox"/> 2
	Culinary	<input type="checkbox"/> 3
	Multi-generational/Family	<input type="checkbox"/> 4
	Religious/Faith-Based	<input type="checkbox"/> 5
	Voluntourism	<input type="checkbox"/> 6
	Health & Wellness	<input type="checkbox"/> 7
	Safari/Nature	<input type="checkbox"/> 8
	Honeymoon/Romance	<input type="checkbox"/> 9
	Other (<i>please specify</i>)	<input type="checkbox"/> 10

Q10) To what extent are you concerned about each of the following global risks and their potential impact on your growth prospects in the next three years?
Please select one on each row only

	Extremely concerned	Very concerned	Somewhat concerned	Not at all concerned	N/A
Strength of the US dollar	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Terrorism	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5

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Pandemics and other health crises	1	2	3	4	5
Global financial instability	1	2	3	4	5
Natural disasters	1	2	3	4	5
Political instability	1	2	3	4	5
Overtourism	1	2	3	4	5
War in Europe	1	2	3	4	5
Cost of living increases (inflation)	1	2	3	4	5
Widespread staffing shortages	1	2	3	4	5
Drop in demand for international travel following well publicized issues such as air capacity, delays and cancelations	1	2	3	4	5

Q11) Looking ahead, please rank in order the issues you believe USTOA will face in 2023 and beyond.

Please rank only those that you believe are an issue

Please rank where '1' will be the biggest issue and then in decreasing order

	Rank
Department of Transportation Regulations	
Global & U.S. tourism taxes	
VISA restrictions	
Open Borders (e.g. Cuba)	
Airline relationships (including surcharges)	
Lobbying Congress	
Consumer/Agent awareness campaign	
Sustainability	
War in Europe	
Increasing costs	
Diversity and inclusion in the Tour Operator industry	

Sustainability

Now thinking specifically about sustainability ...

Q12_NEW) Which of the following best describes your organization’s current position with regard to a sustainability strategy?

ASK ALL

Please select ONE only

No formal strategy	1
We have an informal strategy, that we have discussed internally but not documented	2
We have a formal, documented sustainability strategy but it is not fully embedded across the whole organization	3
Our sustainability is fully embedded across our whole organization	4
Don't know/Unsure	97

Q13_NEW) [Mandatory question] Which of the following factors do you believe are the most important reason(s) for adopting a sustainability strategy within your organization?

ASK ALL

Please rank up to THREE responses in order of importance

SCRIPTING NOTE: Randomise and rotate list excluding Other (94) and Don't know (97)

Compliance with regulations/policies	1
Reducing costs	2
Directive from organization’s leadership	3
Reputational risk	4
Brand and PR	5
Access to finance	6
Corporate values and culture	7
Competition (falling behind - staying ahead)	8
Responding positively to global crises	9
Stakeholders (staff, board, shareholders, customers, public) demanding it	10
Other (please specify)	94
Don't know	97

Q14_NEW) How confident are you that your organization is taking sufficient action to address sustainability issues to remain competitive within your industry?

ASK ALL

Please select ONE only

Not at all confident	1
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Somewhat confident	2
Fairly confident	3
Very confident	4
Don't know	97

Q15_NEW) Which of the following sustainability related areas is your organization planning to focus on most over the next 12 months?

ASK ALL

Please rank the top 3 areas of focus to your organization

Reducing / offsetting carbon emissions	1
Transferring to sustainable energy	2
Switching to recycled, reusable and biodegradable products	3
Preserving biodiversity	4
Reducing food waste	5
Aligning sustainability goals with supply chain and partner	6
Itinerary planning to support local communities	7
Don't know	97

Q16_NEW) Has your company made any of the following commitments?

Please select ONE response for each statement

<i>Do not rotate order</i>	Yes, my company has made this commitment	No, but my company is working toward making this commitment	No, my company has not made this commitment	Don't know
Carbon-neutral commitment Achieved when a company offsets its greenhouse gas (GHG) emissions to zero (e.g., by purchasing voluntary carbon credits)	1	2	3	97
Net-zero commitment Achieved when a company reduces its greenhouse gas (GHG) emissions to near zero and removes its remaining unavoidable emissions	1	2	3	97

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<p>Gender equality commitment Achieved when a company reduces the salary gap between male and female workers in the same role to zero</p>	1	2	3	97
<p>Demographic diversity commitment Achieved when a company's workforce reflects closely the makeup of the local community</p>	1	2	3	97
<p>ESG reporting independently audited Achieved when a company has all of its ESG reporting and performance reviewed by an independent auditor</p>	1	2	3	97

Diversity, Equity, Inclusion and Justice

And finally, thinking about diversity, equity, inclusion and justice in your corporation...

Q17_NEW) To what extent do you agree or disagree with the following statements about the travel and tourism industries customers?

ASK ALL

Please select ONE answer per statement

	Strongly disagree	Disagree	Neither/ Nor	Agree	Strongly agree	Don't know
Travel and tourism is primarily an activity done by the most wealthy in society	1	2	3	4	5	97
Travel and tourism can help address diversity, equity, inclusion and justice issues in wider society	1	2	3	4	5	97
The travel and tourism industry is well equipped to meet the diverse needs of its customers	1	2	3	4	5	97
Looking ahead, the customer base for travel and tourism needs to become more diverse	1	2	3	4	5	97

Q18_NEW) To what extent do you agree or disagree with the following statements about the travel and tourism industries work population?

ASK ALL

Please select ONE answer per statement

	Strongly disagree	Disagree	Neither/ Nor	Agree	Strongly agree	Don't know
Work within the travel and tourism industry is accessible to all	1	2	3	4	5	97
Where I live the individuals who work in travel and tourism are representative of the wider population	1	2	3	4	5	97
The travel and tourism industry respects individual differences, such as culture, working styles, background etc.	1	2	3	4	5	97
I have experienced/witnessed bullying, harassment and/or discrimination in the travel and tourism industry	1	2	3	4	5	97

Q19_NEW) To your knowledge does your organization have networks/groups and/or relevant policies, covering any of the following:

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ASK ALL

Please select ALL that apply

	Networks / Groups		Policies		
	Yes	No	Yes	No	
Gender					1
Race & Ethnicity					2
LGBTQ+					3
Social mobility					4
Faith/religion					5
Seen or unseen disability					6
Age					7
Care responsibilities					8
None of the above					97

Looking ahead - Reimagining the next 50 years

Q20_NEW) To what extent do you agree or disagree with the following statements about the Future of the Tour Operators industry

ASK ALL

Please select ONE answer per statement

	Strongly disagree	Disagree	Neither/ Nor	Agree	Strongly agree	Don't know
New technology will make it easier for customers to get travel information and complete bookings	1	2	3	4	5	97
The current challenging global circumstances are temporary and there will remain a permanent appetite for global travel	1	2	3	4	5	97
The Tour Operator industry has to make a significant shift in business model to survive in a sustainability focused world	1	2	3	4	5	97
The Tour Operator industry will be able to attract the diverse talent base needed to grow in the future	1	2	3	4	5	97

Q21_NEW) What is the biggest area you see USTOA supporting your corporation with over the next 5 years?

ASK ALL

Please type your response in the box below

**Thank you for taking the time to complete this survey.
Your participation has been critical to providing meaningful information. Again, we reassure you that your response will be kept confidential. PwC will not share your individual responses with anyone.**