National Group Travel Report 2011

November 2011

RESEARCH

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This research has been carried out in compliance with the MRQSA international standard (ISO20:252)

Executive Summary

- The GTO market is a static but valuable market, especially at the shoulder periods in the season, with each group traveller on a day trip contributing on average £29.92 to the local economy and those on short breaks £149.59.

- The market is dominated by retired members but younger niche markets exist. There is an opportunity for destinations to tailor their offer to the markets they best fit.

- Although there are a few large membership organisations, GTOs are most likely to represent small and medium sized groups who organise a handful of excursions each year.

- With an increasing proportion of GTOs doing day trips rather than overnight stays, in order to maximise the economic value from this market destinations need to develop packages and strategies to extend, if they are not staying overnight, the amount of time group travellers are in the destination. How can groups on day trips be encouraged to do more or stay into the evening?

- GTOs want destinations to help them with tools and information so they can put together an interesting itinerary and also provide support material to help them sell this to their members.

- It is not yet the time to switch from providing printed marketing to primarily online.

- Although the use of online, especially for sourcing information about destinations is increasing, printed communications are still more widely used. Difficult decisions over the allocation of marketing budgets will need to be made given the broad range of information sources used to decide where to visit.

- Understanding and satisfying the needs of GTOs will result in more visits. The findings show what the key needs of GTOs are.

- Basic ‘hygiene’ factors are very important in decision making with GTOs seeking reassurances about practical elements (e.g. quality of hotels, facilities on offer, coach provision) and looking for financial benefits (e.g. group discounts) before considering a visit to a specific place.

- GTOs are predominantly looking for new experiences be it from visiting somewhere new or going back to a familiar destination which is offering something different.

How to increase your market share...

- For providers, critically review all aspects of your group travel offer to ensure it matches as closely as possible (or if feasible exceeds) the checklist of needs and requirements of group organisers as identified in the research.

- Given the influence of personal recommendation, marketers should look to utilise this source of 'free' marketing by devising strategies to proactively encourage and benefit from positive advocacy from and between GTOs.

- With most group travel trips increasingly being either evening or day trips, providing opportunities for group travellers to spend more time within a destination (for example encouraging them to stay for a meal or do an evening activity) will result in greater economic benefit for destinations from the additional secondary spend.

- As group travellers are open and actively seek new experiences, it is very important that destinations and attractions who have an established groups market continue to create 'new experiences' by packaging their products in different ways.

- With a market comprising a large number of mainly small to medium sized organisations who each do a handful of trips a year and given the high proportion of GTOs likely to return to a destination after a few years, especially if something new is on offer there is a need to build, maintain and effectively use CRM databases to keep potential visitors updated about 'what's on offer'.

- Providers should put mechanisms in place to capture feedback (formal and informal) from GTOs and enquirers who have not gone on to book to help evaluate the offer and get ideas on how to further develop it to satisfy the needs of this audience.

- Destinations and attractions should consider conducting some bespoke group travel research which could help define their individual target market and ultimately help maximise the revenue generated by the still 'lucrative' group travel market.

1. Introduction

This report aims to present the industry with a range of information from the perspective of group travel organisers to help providers better understand their needs and ultimately increase their share of this market.

This report builds on the previous group travel research reports Qa has produced for the industry, updating our National Group Travel Report 2009 and 2006 and before that 'Group 21' - the National Group Travel Report 2002 / 2003 and the National Group Travel Report 1997.

The definition of a group travel organiser (GTO) used for the research was an individual who acts on behalf of a group of travellers, usually twenty or more people, from a club, society or organisation where a common interest is shared. The organiser plans and executes his/her group's travel arrangements solely or in conjunction with an appointed travel professional.

2. Aims and objectives

The overall aim of the research was to:

Enable group marketers to increase their share of the group travel organiser (GTO) market.

The research sought to:

- Identify the various types of group travel organisations
- Determine the average size of organisations by membership
- Determine the average group sizes on trips
- Understand the age profile of group travellers
- Measure the frequency of group visits in the last 12 months in the UK and overseas
- Establish average length of group travel trips
- Determine the average group trip drive times
- Measure the average spend per person on a group trip in the UK
- Understand the length of lead time in planning and booking a trip
- Rank the key features that prompt decision making
- Understand the preferred information sources that prompt decision making
- Determine how trips are organised / booked
- Explore internet usage for group travel
- Establish problems group travel organisers regularly encounter when organising trips
- Uncover attitudes and opinions on different aspects of group travel.

3. Method & sample

In order to contact group travel organisers, Qa Research included a paper self-completion questionnaire in the June/July edition of Group Travel Organiser magazine who also provided contact details for Qa to send out a link to an online survey to those on their contact database who had an email address.

In addition links to an online survey were sent out by various other tourism organisations to relevant contacts.

Qa Research and Group Travel Organiser magazine would like to thank those organisations who have provided valuable input into the survey design and also helped distribute the survey to a wide audience of group travel organisers.

In total, 459 GTOs completed the survey. This provides a sample which in research terms means we can be 95% confident that the data has a variance of no more than +/- 4.6%. Therefore, the findings are based on a sample size inside the +/- 5% standard error rate required to provide statistically robust results.

Although the sample comprised more readers of GTO magazine than of the other group travel publications, over a third of the sample also read Group Leisure (37%), The Pass (36%), along with 25% who read a range of other publications. Our analysis of the answers given shows no statistically significant differences between readers of GTO magazine and any of the other publications. Therefore, we can be confident that a representative sample of group travel organisers have been consulted.

Only bona fide group organisers were eligible to take part; with screening questions asked in the online survey to ensure all respondents were GTOs as defined in the introduction.

Some questions allowed for direct comparison with the results from 2002, 2006 and 2009. Percentages have been rounded to the nearest whole number. Various questions also included multiple responses. Please note that for these reasons results might not add up to exactly 100%.

Comparisons with findings from previous research are reported under **Trend Analysis**.

Where appropriate, Qa has added our own comment and opinion about the findings throughout the report. This will be found with text in a light blue box titled **Comment** to differentiate it from the factual data.

Please note where relevant we have analysed the data using one or more of the following ways, giving a mode or median figure when the mean is affected by a number of outliers in the data.

The **mean** is the average of a set of numbers, calculated by adding up the total of all the scores and dividing by the base (i.e. the number of respondents answering the question).

The **median** is an alternative to the mean and is particularly useful where there are extreme values in a set of data. It is the mid-value in a size-ordered set.

The **mode** is another alternative to the mean and is defined as the most frequently occurring value in a set of data.

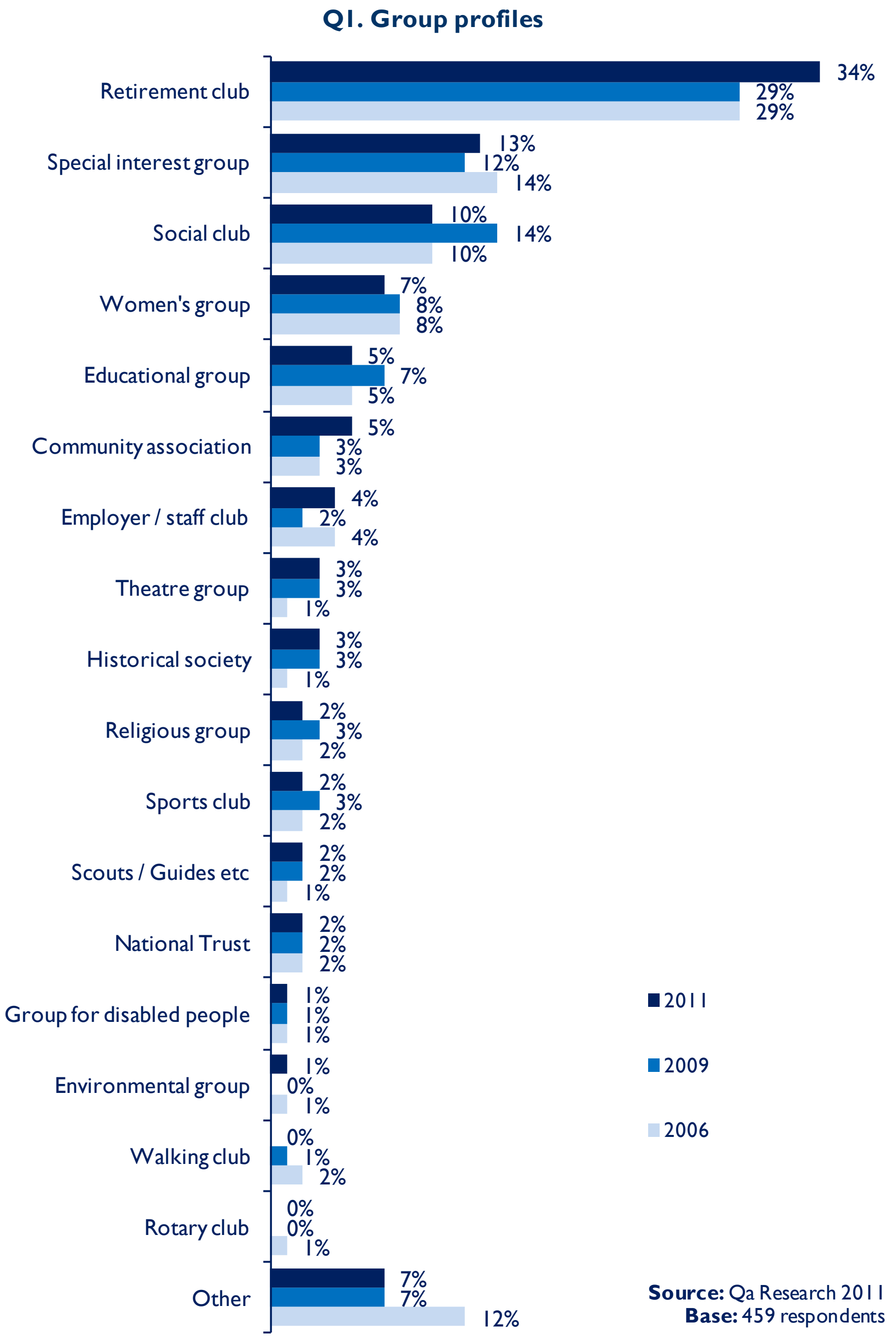
4. Key findings

The following section presents the key findings of the research.

4.1 Profile of the group travel market

4.1.1 Type of group travel organisation

GTOs were asked which type of group they work for or act on behalf of.



Trend analysis

Overall, the group types represented by GTOs in this research show a strong resemblance to the groups represented in previous years. The 2011 results seem to show a slight increase (up by 5% points) in retirement groups, which may be linked to the fact that the British population has an increasing retired population.[1]

Comment

The results indicate that the current group travel market is relatively stable. There appears to be a broad mix of different group types, although retirement groups continue to form the largest single type of membership organisation.

With such a diverse range of groups a one size fits all approach will be inappropriate.

As group travel attracts very different types of groups, it is important to identify and target specific group types who destinations, venues and attractions wish to attract. It therefore remains vital that services, facilities and marketing are tailored to the type of groups that destinations or attractions are aiming to attract.

[1] According to the Office for National Statistics, in 2011 13.9 million people in the UK will be over 60, compared to 12.1 million in 2001.- www.statistics.gov.uk

4.1.2 Size of organisation

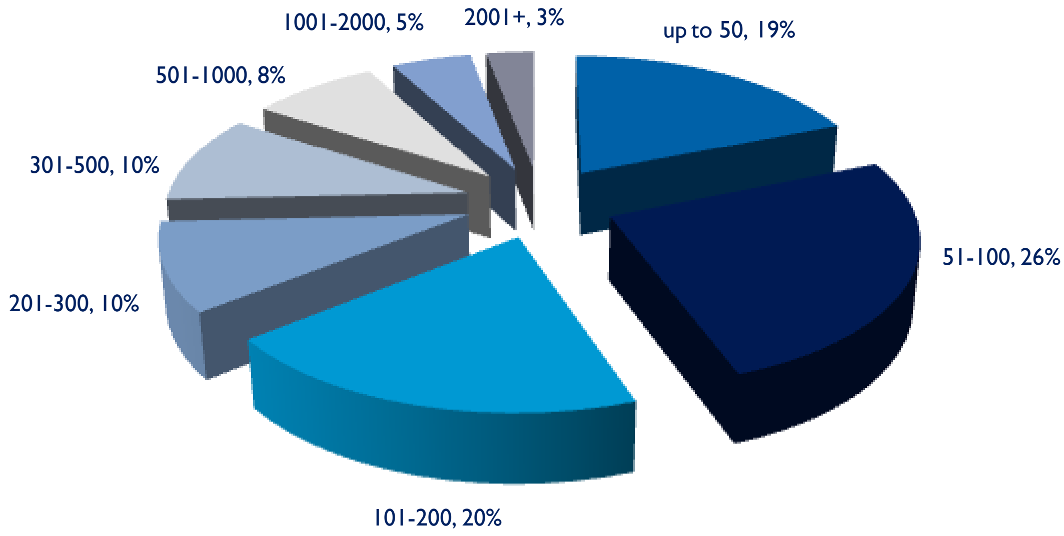
GTOs were asked how many members they have in their organisation.

The minimum was two members and the maximum 15,000 members.

The mean number of members was 427, the median 128 and the mode 100 in their organisation.

The chart below illustrates the size of the membership organisations GTOs represent.

Q2. Number of members in organisation



Source: Qa Research 2011 **Base:** 452 (excluding those saying 'don't know')

Overall, almost two thirds of all GTOs had less than 200 members in their organisation (65%), with medium sized groups (51 to 100 members) constituting the single largest proportion (26%).

Only 8% of all GTOs come from organisations with more than 1000 members and only 1% have more than 5000 members.

Average group size

GTOs were also asked to state the average number of members who participate in group excursions / breaks.

The average (mean) number of people on a group trip was 48; with a median figure of 40 and a mode of 40.

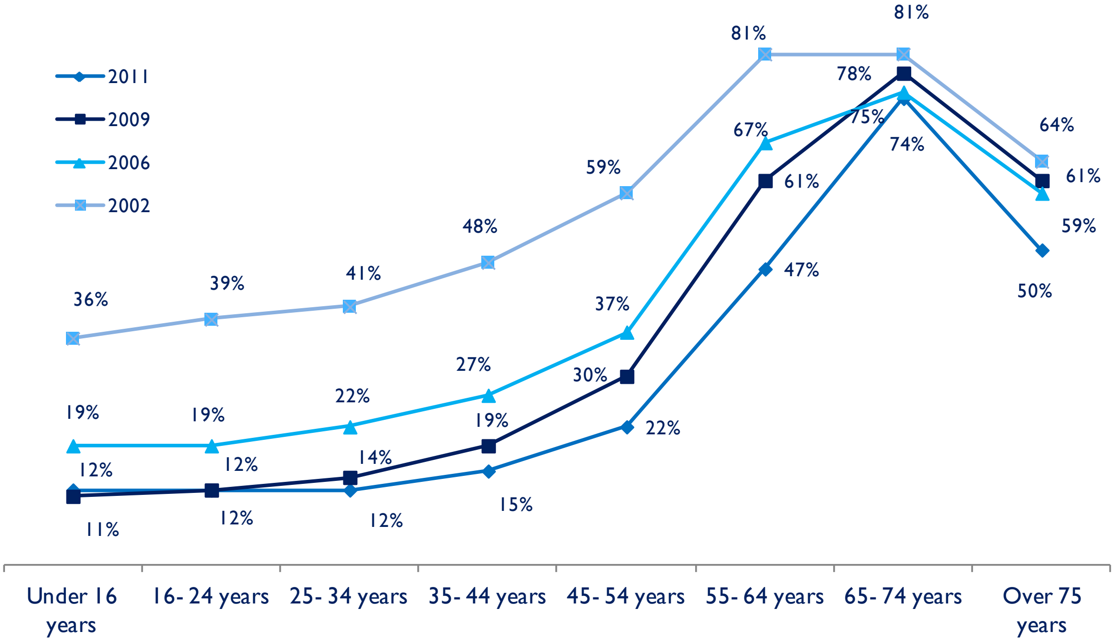
Trend Analysis

The average group size going on trips shows a slight decrease from 52 in 2009 to 48 in 2011, which is also lower than in 2002 and 2006 (50 people per group). However, it still equates to an average coach being almost completely filled.

4.1.3 Age of group members

Respondents were asked the age bands the majority of their members tend to fall into. There was an option to answer 'all age bands' or provide multiple answers hence the figures below add up to over 100%.

Q4: Age profile of members



Source: Qa Research 2011 **Base:** 459 respondents

The age of group members shows a distinct trend towards the retirement market; with 74% of all GTOs stating that the majority of their group members fall into the 65 to 74 years age bracket, with 50% having most of their members in the over 75 years old age category.

Trend analysis

As in previous years, younger age bands appear to comprise a smaller proportion of group travel organisations members than older age bands, with the age profile from this research mirroring the results from previous years.

Comment

The fact that younger age groups are still underrepresented in the proportion of members participating in group travel suggests that they still show a preference for individual travel.

The profile of the age range of group members and the types of groups shown earlier confirm that the largest proportion of GTO members are retired but other age bands could still constitute a valuable niche audience to attract depending on a destination or attraction's product offer.

4.2 Volume and length of trips

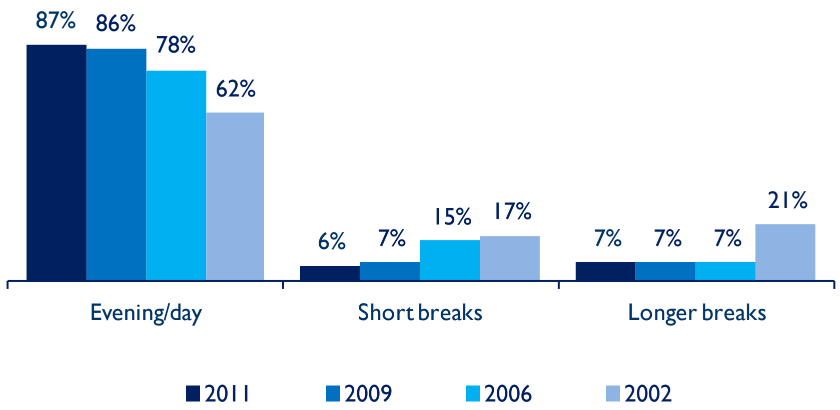
4.2.1 Volume and type of UK trips

GTOs were asked how many UK group visits in total they had undertaken over the whole of last year:

- The mean average number of trips undertaken was 14.68[2]
- The mode was 7
- The median was 10

The chart below illustrates the proportional distribution between evening/day, shorter (1 to 3 nights) and longer breaks (4+ nights) undertaken in this and during the previous three research studies.

Q5a. UK break distribution



Source: Qa Research 2011 **Base:** Varying

Evening/day trips remain the most popular type of group travel with 87% of all breaks undertaken in the most recent research being either an evening trip (23%) or a day trip (64%).

Trend analysis

The average number of trips organised by each GTO is broadly similar to previous research with a mean number of 12.5 UK trips in the 2009 research.

Overall, the proportional distribution between evening/day trips, short breaks and longer breaks shows strong similarity with the 2009 research and shows that the UK group travel market is fairly established and stable, although with a long term trend to undertake more day trips and fewer overnight stays than a decade ago.

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[2] Please note that the mean shows a significantly higher value as the small number of large sized GTOs are organising a large number of trips which impacts on the results.

The proportion of evening breaks undertaken appears to have slightly increased from 20% in 2009 to 23% in the most recent research, while day trips have decreased from 66% to 64% in the same period.

Comment

As most GTOs only undertake a few trips each year destinations will find it time consuming to service a large number of GTOs who are only likely to visit once or possibly twice a year. Depending on your product offer it may be worthwhile concentrating on building a personal relationship with the handful of GTOs who organise multiple trips each year.

Those GTOs who only infrequently organise trips may require or be grateful for any additional help in putting together or helping sell their trip to members; although this will be best done through ideas and help provided in your marketing communications rather than being individually tailored for each group.

With the proportion that organise overnight breaks decreasing (38% in 2002 to 13% in the most recent research), it is recommended to try and optimise the value derived from day trips by trying to maximise the amount of time group travellers spend at a destination.

Therefore it is vital that Destination Management Organisations work closely with venues and attractions to create a well packaged day trip experience.

4.2.2 Volume and type of overseas trips

GTOs were asked how many overseas group visits they had undertaken in 2010.

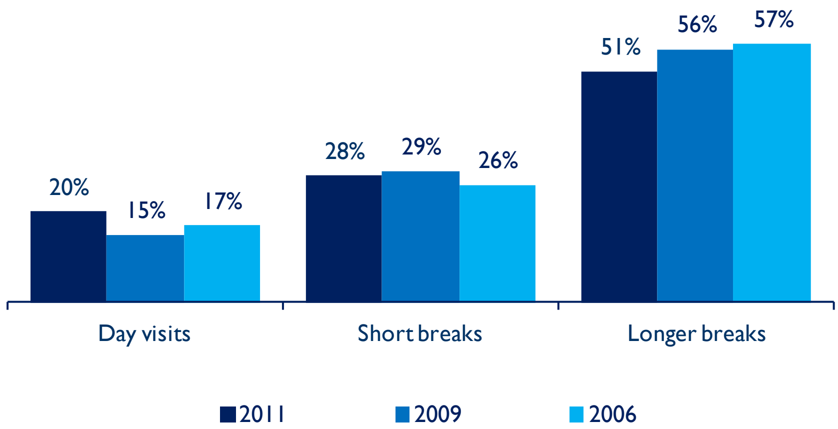
About one third (32%) of all GTOs had undertaken an overseas group visit over the course of last year, which is in line with the 2009 figures (33%).

The average (mean) number of overseas group visits GTOs had undertaken was 1.01 trips.

The chart overleaf illustrates the proportion of overseas visit types - day visits, short breaks (1 – 3 nights) and longer breaks (4+ nights) that were undertaken by GTOs compared to the 2009 and 2006 research findings.

The chart shows that the single largest proportion of those who had organised an overseas trip had organised longer breaks of four and more nights (51%) followed by short breaks (28%) and day visits (20%).

Q5b. Overseas break distribution



Source: Qa Research 2011 **Base:** Varying

Trend analysis

The proportion of GTOs undertaking longer breaks overseas has slowly declined over the past few years, although remaining by a long way the most common type of overseas GTO visit.

In the 2011 research a slightly lower proportion undertook longer breaks (51%) than in previous years (56% in 2009 and 57% in 2006), whereas a slightly higher proportion undertook day visits (20% in 2011 compared to 15% in 2009 and 17% in 2006).

Comment

The trend towards fewer longer overseas breaks (4 nights plus) appears to continue.

This trend can also be noticed across the UK, with UK residents generally organising fewer overseas holidays and more UK based holidays.[3]

Given the current economic climate, the rising costs of air and coach travel (due to an increase in fuel costs) and the less favourable exchange rate with the Euro (the British Pound does not stretch as far as it might have done in 2006 and before), it is perhaps not surprising that the proportion of those taking longer overseas trips has slightly decreased (although still constitutes the largest individual proportion).

As destinations gain considerably more economic benefit from overnight visitors, in terms of direct and secondary spend, destinations might want to research further how to convert those who continue to go overseas to stay in the UK for a longer group holiday.

[3] VisitEngland – http://www.visitengland.org/media/pressreleases/visitengland_staycation.aspx

European River and Ocean Cruises

GTOs were also asked if they had organised either an ocean cruise or European river cruise in the last 12 months.

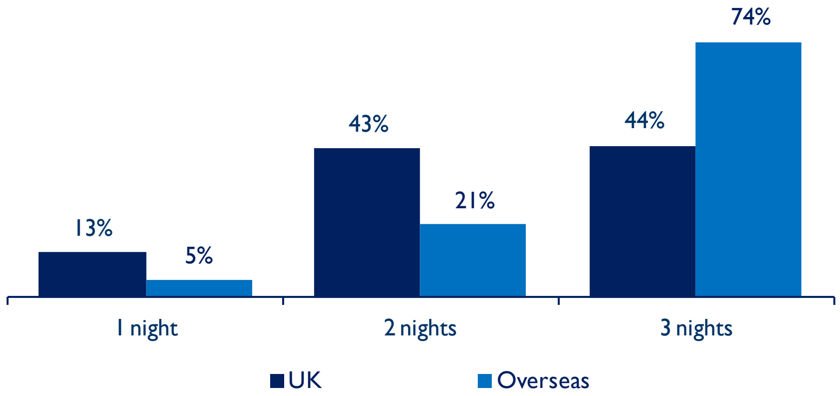
Overall 5% had organised a European river cruise (Rhine, Danube and Amsterdam featuring most frequently) and 5% had organised an ocean cruise.

Popular ocean cruise destinations included the Mediterranean Sea, the Baltic Sea, Norway and around the British Isles (including Ireland).

4.2.3 Length of trip and travel time

The chart below illustrates the proportional distribution between 1 and 3 nights of UK and overseas short breaks. With the average length of stay for UK short breaks being 2.31 nights and the average length of overseas short breaks being 2.70 nights.

Q8. UK and overseas short break - average length of stay



Source: Qa Research 2011 **Base:** Varying

The average length of time of UK longer breaks was 5.05 nights and overseas longer breaks 7.1 nights.

Travel time

Respondents were asked what the average amount of time was that their group travelled one way to a UK destination for day and overnight breaks.

The result for day visits was:

- Mean: 2 hours and 41 minutes
- Median: 2 hours
- Mode: 2 hours

Whereas the result for overnight visits was:

- Mean 4 hours and 35 minutes
- Median 5 hours
- Mode 4 hours

Trend analysis

The findings with previous research show a consistent pattern; comparison with the 2009 National Group Travel results show that the average amount of time that groups travelled one way for day visits whilst on their way to a UK destination was 2 hrs and 35 minutes.

Comment

Average travel time will provide destinations and attractions with a good indication about the target catchment areas they are most likely to draw GTOs from.

4.3 Economic value of group travel

GTOs were asked a series of questions about spend and secondary spend in terms of group travel.

Respondents were asked to state the average amount one person pays for the different types of trip. The results from 2011 and 2009 are displayed in the table below.

	2009 Total per person	2011 Total per person	% change
Evening trips	£27.49	£28.82	5%
Day trips	£26.25	£28.75	10%
Short breaks	£176.79	£153.52	-13%
Longer breaks	£312.88	£301.76	-4%

Trend analysis

It shows that group travel remains an important market with the average spend on evening and day trips being slightly higher (up by 5% and 10%), whereas the spend on shorter breaks in particular saw a decrease by 13% from £176.79 to £153.52 in 2011.

Groups were also asked to allocate what proportion of the total costs for each type of trip undertaken went on different elements. The table below illustrates the findings[4]:

	Evening trip	Day trip	Overnight trip
Travel (incl coach travel)	30%	50%	27%
Accommodation	N/A	N/A	44%
Food and drink	13%	13%	11%
Admission charges	10%	26%	9%
Evening entertainment	46%	7%	5%
Other expenses	2%	4%	4%

The results provide an indication about how much groups spend at destinations.

It clearly shows that destinations benefit most from overnight trips as almost half of the costs per person for the trip go directly to pay for accommodation (44%) in addition to the spend on food and drink, admission charges and evening entertainment.

[4] Please note that these figures are only indicative, as the sample size for some of these is rather small with many respondents being unable to break down and allocate the proportion of the total cost assigned to each category.

Therefore, for a short break costing £153.52 per person on average, 73% of this figure will be spent in the destination.

The table below outlines the average value each group traveller contributes to a destination.

In order to establish these figures the survey asked what the average spend per person was in addition to the cost of going on the trip whilst in the destination but excludes the proportion of the trip cost which goes on travel costs.

The second column is based on the average length of a trip.

	2011 Total average spend per person per day	2011 Total average spend per person per trip
Evening trips	£30.28	£30.28
Day trips	£29.92	£29.92
Short breaks	£65.04	£149.59
Longer breaks	£54.95	£277.51

The table illustrates the importance of encouraging overnight stays of group travellers, as each short break group traveller contributes on average twice as much per day to the local economy than a day visitor.

However with the spend for evening (£30.28 per person) and day trips (£29.92) at the destination being significant, one should not underestimate the value of attracting day visits from groups.

Comment

Again the results highlight the benefit of attracting overnight visitors as they are more likely to spend larger amounts (both from the cost of the trip which goes to the destination and on additional spending whilst there).

However, with most group travel trips being either evening or day trips, it remains important to encourage additional spend at destinations and attractions by providing opportunities for group travellers on day visits to spend more, for example by encouraging them to stay for a meal or do an evening activity.

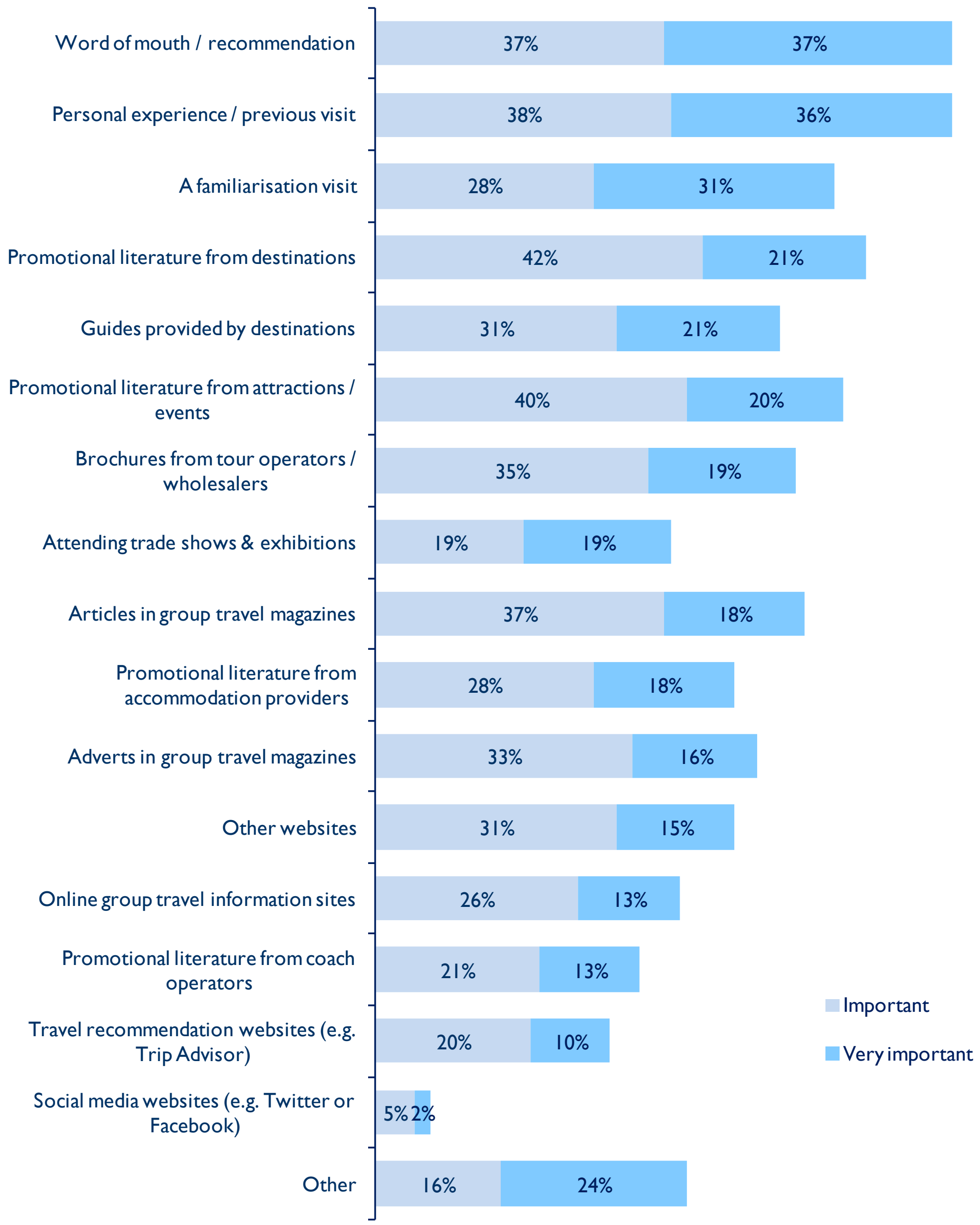
4.4 Information sources

4.4.1 Information sources used to decide where to go

GTOs were asked to rate on a scale of 1 to 5 (with 1 being 'not important' and 5 being 'very important') the importance of various information sources in helping to decide upon a group visit.

The chart below shows those who rated the information as 'very important' and 'important', ranked in order from most to least based on those saying 'very important'.

Q17. Sources of information



Source: Qa Research 2011 **Base:** Varying

Trend analysis

Word of mouth and previous experience/previous visits again top the list and remain the most important sources of information as they also were in 2009.

Although websites are increasing in importance compared to previous years (20% ‘very important’ and 21% ‘important’ in 2009), it is interesting to see that printed publications such as promotional literature from destinations (27% ‘very important’ and 37% ‘important’ in 2009) and attractions (25% / 29% respectively) have not lost their impact and still remain considerably more important than their online equivalent.

Comment

The results show that although it remains important for destinations and attractions to provide a range of online and printed sources of information the most important form of marketing is actual experience and recommendations to friends and families. Devising ways to capitalise on this may encourage proactive advocacy.

The findings also show that a wide range of sources of information are considered important both online and print, requiring difficult strategic decisions over where limited marketing budgets should be allocated.

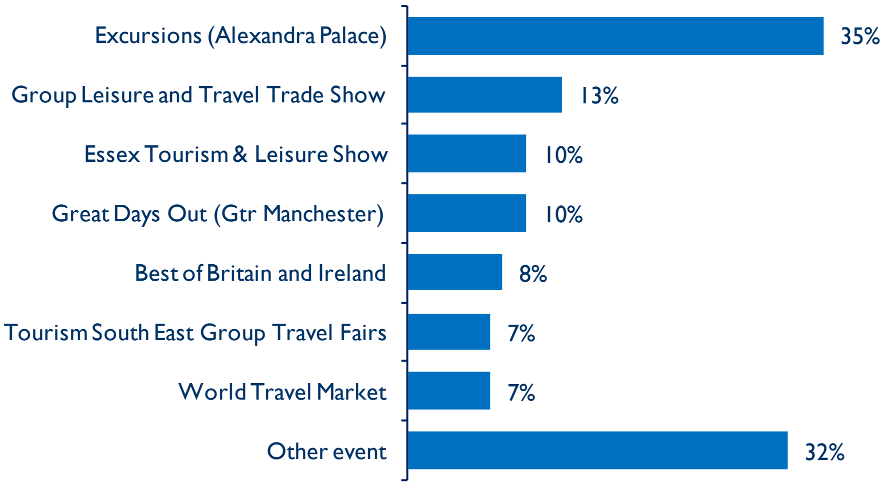
Should destinations or attractions decide that they wish to target the retired market, it is vital to provide information material that appeals to this age market such as printed guides.

4.4.2 Attendance at trade shows and exhibitions

GTOs were asked which if any travel shows and exhibitions they had attended in the last 12 months. In total 48% had attended a trade show or exhibition. Of those that attended a trade show or exhibition, the majority 82% only attended one trade show, with 18% attending 2 or more trade shows.

The percentages below are based only on those who attended a trade show or exhibition in the UK in the last 12 months.

Q18. Trade shows & exhibitions



Source: Qa Research 2011 **Base:** 220 respondents

Two thirds of all those who had gone to a trade show or exhibition considered them to be a useful source of information, with 33% of all those who had attended rating them as 'very important' and 31% as 'important' (see Q17 page 19).

Trend analysis

The results show a significant increase (up by 11% points compared to 37% in 2009) in GTOs that attended either a trade show or exhibition in 2011.

Despite the increase in numbers of GTOs attending trade shows, the average number of shows they attend has decreased (82% compared to 69% in 2009 only attended one trade show or exhibition).

4.4.3 Time taken to organise and book a trip

Lead in times

GTOs were asked how many months before a trip do they start planning the excursion programme and how many months before going do they book the trip.

GTOs continue to have a long lead in time before they are going on a trip. The average number of months GTOs start planning before actually going on a trip was 8.1 months ranging from spontaneous bookings (0 months) to over a year.

More than 80% of all GTOs start planning at least 6 months before the trip.

Booking trip

GTOs book their trip well in advance with 60% booking at least 6 months prior to taking the trip.

The average time between booking a trip and going is 6.1 months.

Comment

We know from this and previous research Qa has undertaken that GTOs are increasingly finding it difficult to know if a trip can run as a commitment from members and their booking forms are increasingly coming back later (see findings on page 31).

This increases worry over not having a full coach and therefore not covering costs. It would help some GTOs to receive posters and other support material which help sell / promote a trip to their members, especially for less well known destinations.

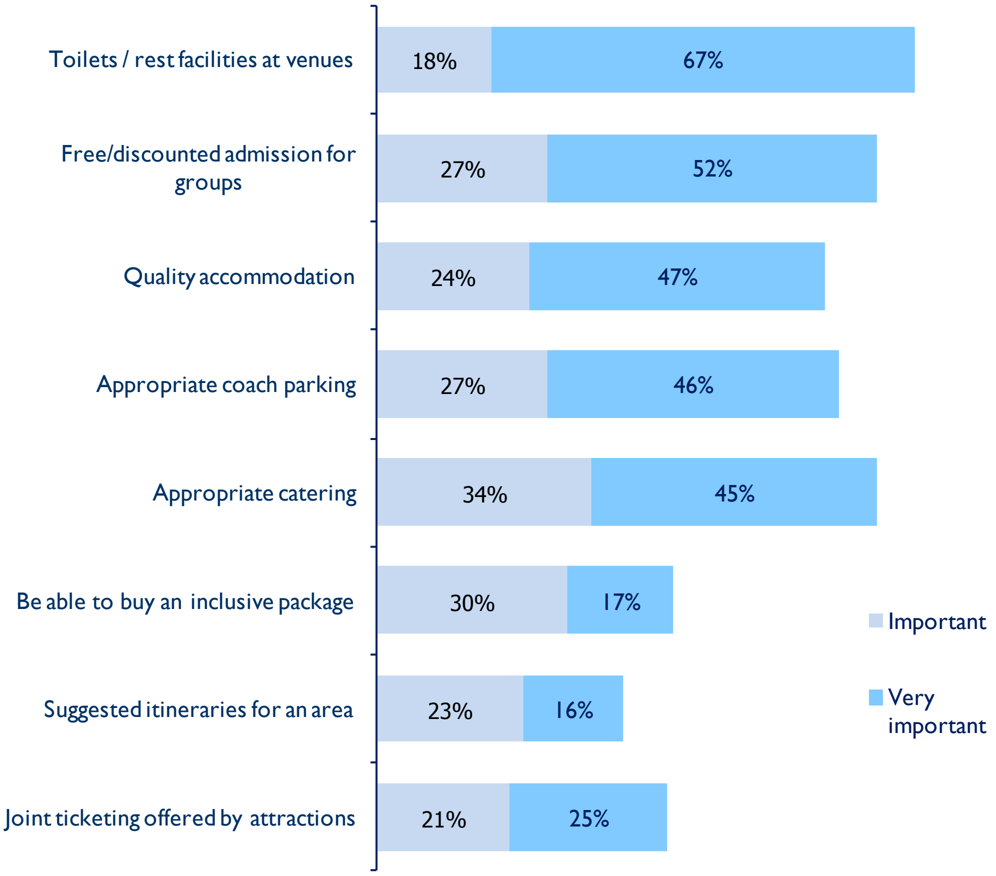
4.5. Needs and wants of GTOs

4.5.1 What GTOs want from providers

As in previous years GTOs were asked to rate on a scale of 1 to 5 (with 1 being not important and 5 being very important) the importance of a range of different services and features to themselves and their groups.

The chart below is based on the percentages giving a 'very important' and 'important' rating, ordered from the highest based on those saying 'very important'.

Q16. Needs and wants of groups



Source: Qa Research 2011 **Base:** Varying

Trend analysis

Overall the 2011 results mirror the 2009 and 2006 results, with their top 5 needs and wants remaining the same.

Interestingly, the results show that 'quality accommodation' appears to be slightly less important in 2011 compared to previous years (59% 'very important' and 22% 'important' in 2009), which might be linked to the fact that fewer overnight stays are being undertaken or that GTOs are willing to trade down slightly to reduce the overall cost of a trip.

Comment

The research shows it is important not to lose sight of the basics (e.g. toilets, groups being able to be catered for and all fed at the same time, parking close to venues especially for older members) and provide reassurance and evidence in marketing communications.

Groups believe they should be rewarded for bringing a large number of visitors to a destination or attraction so ideally any marketing should acknowledge and reflect this and provide a financial thank you in terms of a suitable discount.

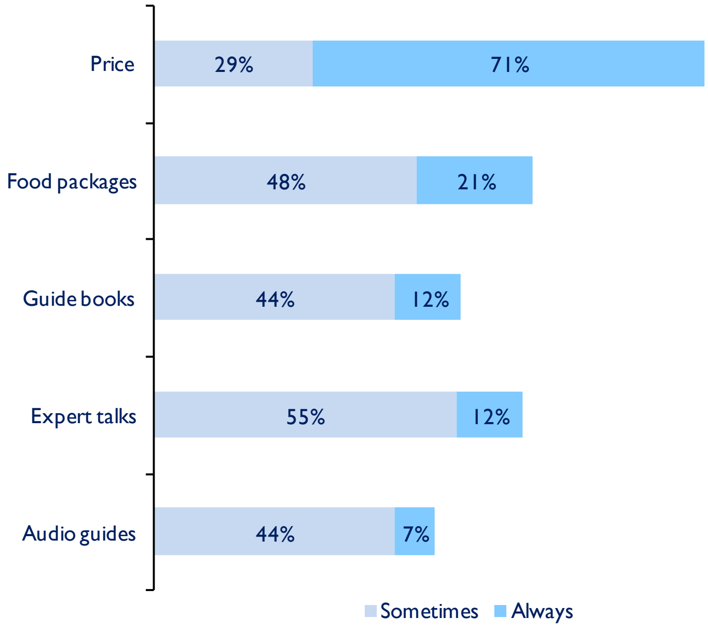
4.5.2 Factors impacting on decision making

GTOs were asked to what extent (ranging from never, sometimes to always) they considered any of the following aspects when deciding which trip to book.

Although the questionnaire did not include an option for 'price' there was an option for 'other' in which it was mentioned spontaneously by a large number of GTOs as a 'very important' factor that influenced the choice of destination.

The findings below show those who said 'sometimes' or 'always' but excludes those saying 'never', with the chart below showing the results in rank order based on those who said 'always'.

Q15. Aspects impacting on groups choice



Source: Qa Research 2011 **Base:** Varying

Comment

Findings suggest that price is a crucial factor for groups during their decision process. Therefore it is vital when marketing to groups to be perceived as offering good value for money. A single price without lots of hidden add-ons is needed to help GTOs price the trip to their members. Transparency about what is and isn't included in the price is likely to have more appeal than a low headline grabbing price.

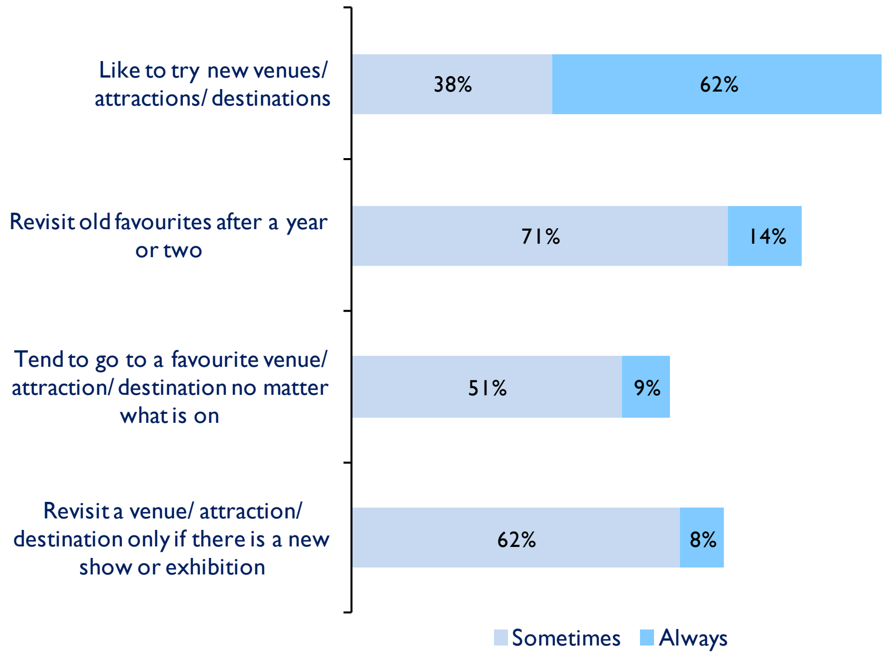
4.6. Appeal of old favourites versus going somewhere new

GTOs were asked to assign a level of agreement about a range of attitudinal statements. The question began ...'does your group...' followed by the sentences in the chart below.

The findings below show those who said 'sometimes' or 'always' but excludes those saying 'never'.

The chart is ranked in order of those who said 'always'.

Q14. Loyalty to destinations/ attractions/ venues



Source: Qa Research 2011 **Base:** Varying

Trend analysis

The results show a fairly consistent picture with the 2009 and 2006 research. For example in 2011, 62% of all GTOs 'always' like to try new venues, attractions and destinations; this compares to 65% in 2009 and 2006.

However, the proportion that 'always' revisit old favourites continues to decrease with 14% in 2011, down from 20% in 2009 and 25% in 2006, suggesting that groups are becoming more adventurous and open to trying new experiences.

Comment

It should be easier to attract GTOs if offering something new, either a new (but trusted) venue to visit or a new offer in a previously appealing destination.

In order to create the perception of something new, a new package, event or themed tour could be introduced.

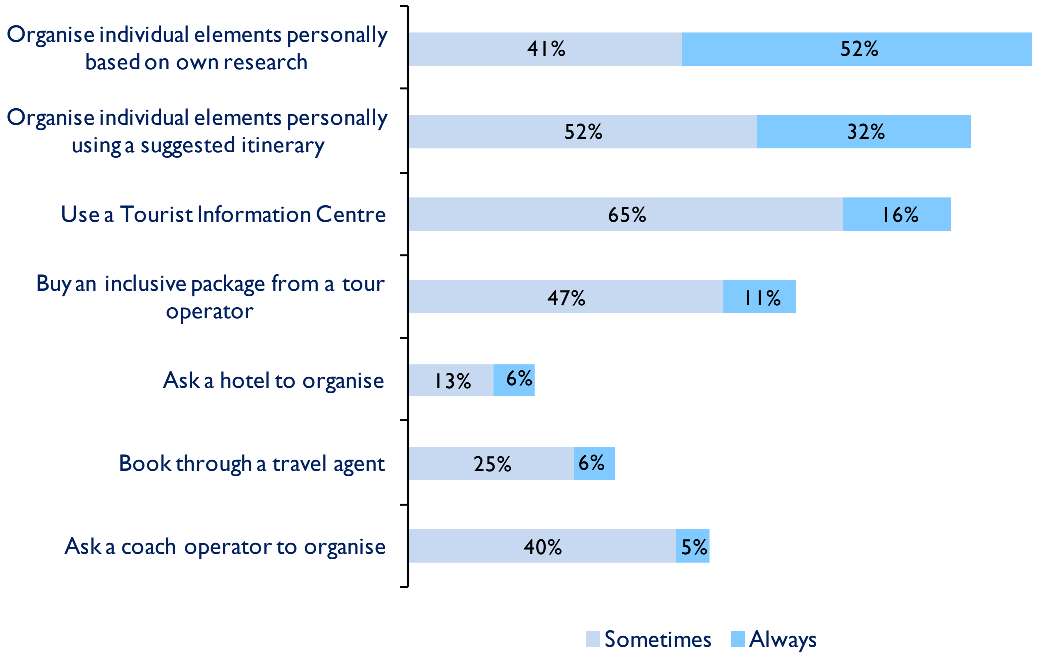
However, even destinations offering nothing new but a previously good experience, have a good opportunity to attract a large proportion of GTOs back after a few years so it is important to maintain or develop good contact databases to enable yourselves to keep in contact with GTOs.

4.7 Booking preferences

GTOs were asked how they tended to organise or book their group travel trip. The findings below show those who said 'sometimes' or 'always' but excludes those saying 'never'.

The chart is ranked in order of those who said 'always'.

Q21. Booking behaviour



Source: Qa Research 2011 **Base:** Varying

The chart above clearly illustrates that GTOs show a clear preference for organising the trip themselves, with 52% stating they would 'always' organise individual elements personally based on their own research and 32% stating that they would 'always' organise individual elements personally, using a suggested itinerary.

Trend analysis

The comparison with previous years' results shows a similar pattern overall. However there seems to be an increasing tendency to organise trips themselves, rather than relying on other agents to organise it on the group's behalf. For example the proportion of GTOs who state they would 'never' book via a hotel or travel agent increased from 74% and 65% in 2009 to 81% and 69% respectively in 2011.

Similarly, fewer GTOs appear to be interested in having coach operators organising their trip (5% stated always in 2011 compared to 8% in 2009).

Comment

The results suggest most GTOs want to be in charge of tailor making their trips but destinations can help make it easier for them to create their own package by providing menus of ideas or interactive suggested itineraries.

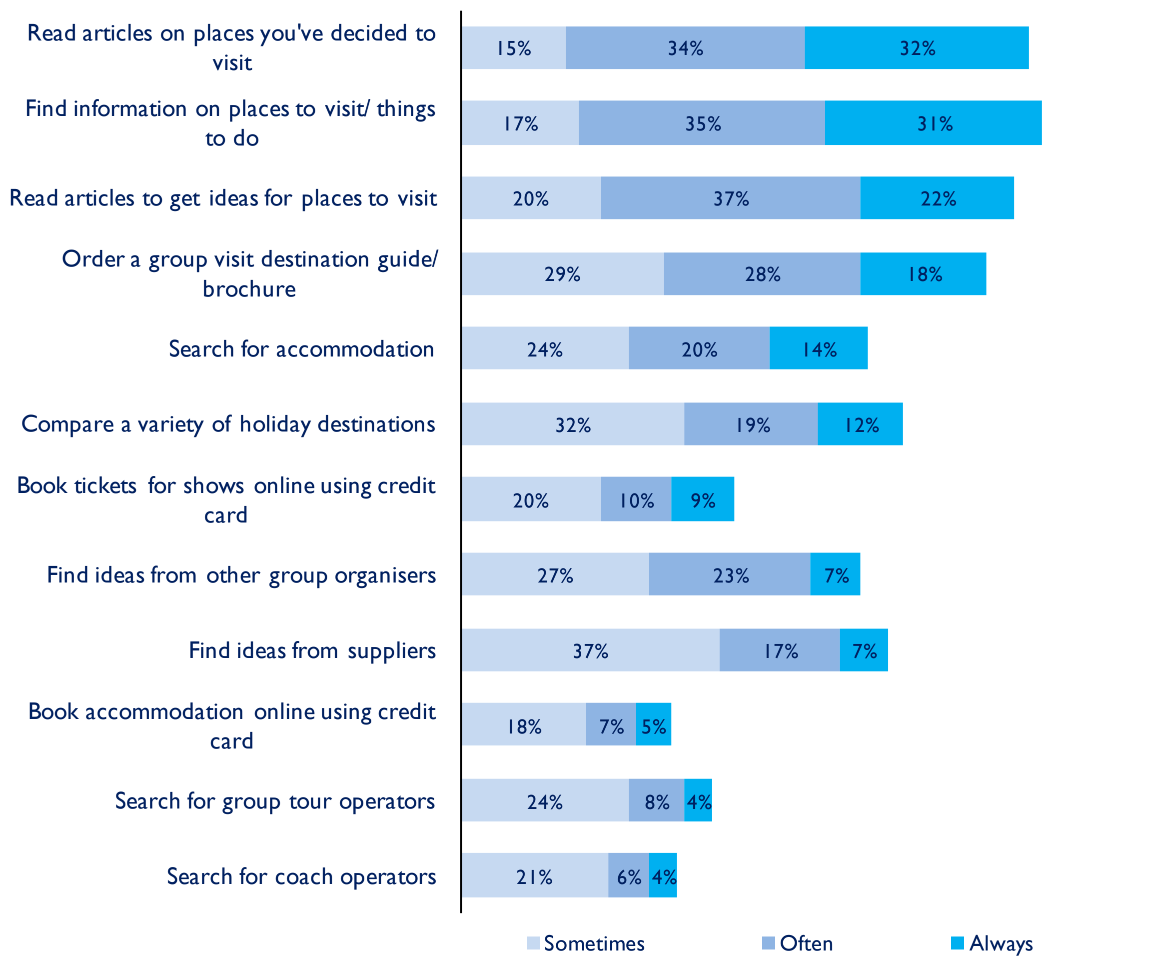
Although only sometimes used there is still a potential to benefit from building a relationship with coach operators and travel agents.

4.8 Internet usage

GTOs were asked how they use the internet for group travel purposes. The chart below only shows the percentages of GTOs who at the very least sometimes use the internet for each of the activities given (and excludes those who said 'not at all').

The answers have been ranked in order of those saying 'always'.

Q20. Usage of internet for group travel purposes



Source: Qa Research 2011 **Base:** Varying

In total 17% of GTOs said 'not at all' or left every option blank, suggesting nearly one fifth of GTOs do not currently have or use the internet.

Trend analysis

The research shows that the internet continues to grow in importance particularly for sourcing information. The results show that in 2011, a larger proportion used the internet to either read articles (32% compared to 25% in 2009) or find information on places to visit (31% in 2011, compared to 22% in 2009).

However while the internet appears to be used as an inspirational tool to find out about and help decide on places to visit, there are considerably fewer GTOs as yet using it for actually booking tickets or accommodation.

The proportion of GTOs using it to book tickets or accommodation is very similar to the findings from 2009.

Comment

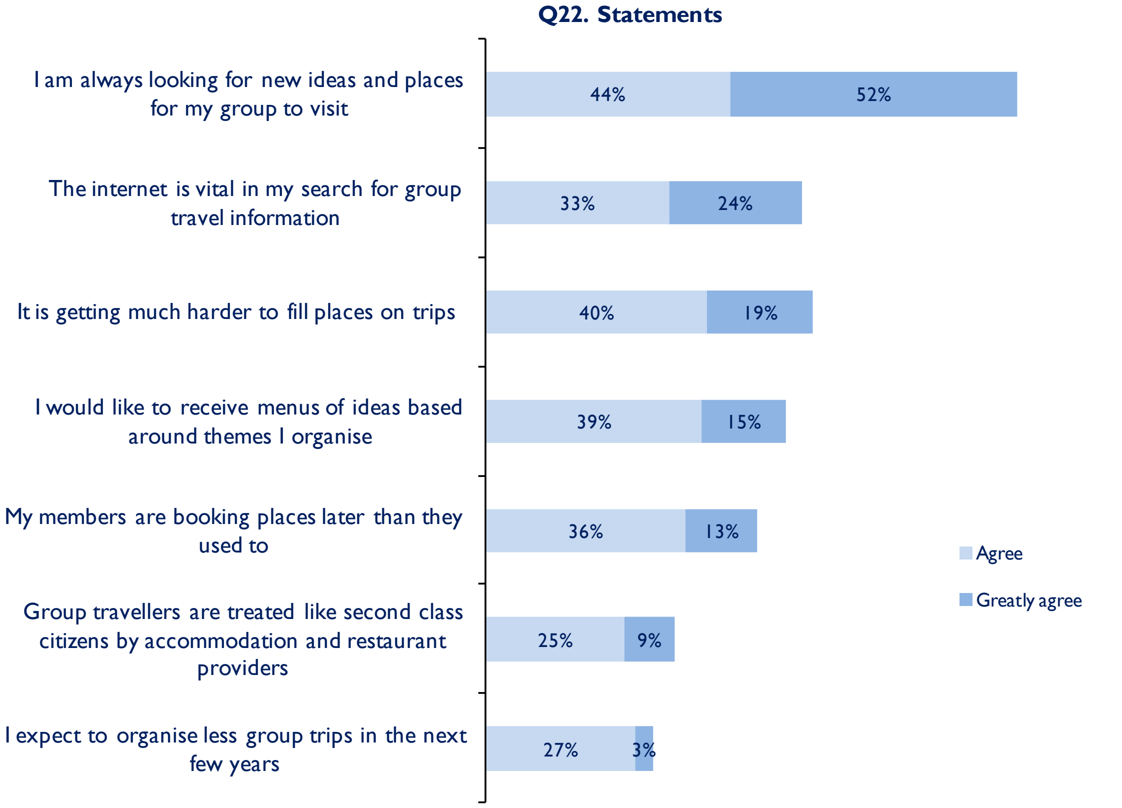
Although there appears to be an increase in the usage of the internet to choose which places to visit, it continues to be used much less for booking accommodation or tickets.

Therefore the design and functionality of websites should focus on providing tools to help itinerary planning, whilst providing the option to book accommodation or tickets online but with clear contact details to also do this offline.

4.9 Future of the GTO market

GTOs were presented with a series of statements which explored their future behaviour.

The findings below are based on those who said 'agree' or 'strongly agree' with the statements given. The answers are shown in ranked order based on those saying 'greatly agree'.



Source: Qa Research 2011 **Base:** Varying

Comment

The groups market remains reasonably stable given that over half of all GTOs expect to organise the same or more group trips over the next few years and only one in three (30%) expect to organise fewer group trips.

The results show that GTOs are very open to new ideas and places to visit with 96% of all respondents agreeing to this statement, therefore there is a clear need for destinations to innovate and offer new experiences.

As previously seen, the internet is perceived as a useful tool to search for group travel information but is far from being ubiquitous amongst this audience. Other channels are also used and still very much desired.

Destinations and providers who appreciate the challenges GTOs face in filling places on a trip, with their members booking a place later than ever before and who devise ways to help GTOs sell a proposed trip are likely to reap the benefit of more bookings.

Simply valuing GTO business is a good starting point given that a third (34%) feel they are treated poorly by accommodation providers and restaurants. Experiences on the ground are likely to have a big impact on the decision to return to a particular destination.

5. Optimising your market share

Subsequent bespoke research

Qa has a contact database of group travel organisers who participated in this and previous research that are willing to participate in further research.

We are happy to discuss with you any further research requirements you may have and devise an appropriate and cost effective approach to answer the questions and objectives you may have.

GTO seminar and workshop for destination and attraction professionals

Qa can run bespoke seminars and workshops for professionals working for destinations and attractions who want to explore key issues and better understand how to optimise their share of the GTO market and learn from the good practice and experience of others in the sector.

If you want to receive more information about Qa Research or the GTO workshop seminar specifically please contact Kathrin Tennstedt, Research Manager in the Leisure & Tourism Research team at Qa on 01904 632 039 or email kathrin.tennstedt@qaresearch.co.uk

Qa RESEARCH

6. About Qa Research

Qa Research has a dedicated tourism team that provides destinations, attractions and other tourism bodies with qualitative and quantitative research that enables them to:

- Gain market share
- Test new products or refine existing ones
- Increase customer satisfaction levels
- Attract non-visitors
- Strengthen funding bids
- Target hard to reach groups
- Measure the effectiveness of marketing campaigns
- Develop or refine brand identities
- Understand perceptions and awareness of their products
- Produce sustainable tourism policies and plans

Our tourism team undertakes research with visitors, non-visitors and stakeholders that allows destinations and attractions to make informed decisions.

Our core research services include:

- Online surveys
- Face-to-face surveying
- In-depth interviews
- Self-completion surveys
- Telephone research (using our in-house specialist contact centre)
- Focus groups
- Workshops
- Desk research

For more information about Qa Research please look on our website www.qaresearch.co.uk

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