

Understanding Group Travel Organisers

The National Group Travel Report 2009



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Research

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Introduction

QA Research is pleased to introduce the National Group Travel Report 2009.

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 your 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 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.

Aim

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 varying types of group travel organisations
- Determine the average size of organisations by membership
- Determine the average group sizes on trips
- Understand the typical age ranges of organisation membership
- Measure the frequency of group visits in the last 12 months
- Determine the average group trip drive times
- Measure the average spend per person on group trips
- Calculate the value of the official groups market
- Understand the preferred months to receive information, book trips and undertake trips
- Rank the key features that prompt decision making
- Determine the preferred activities for group trips
- Understand the preferred information sources that prompt decision making
- Determine how trips are organised / booked
- Explore current and likely future internet usage
- Uncover attitudes and opinions on different aspects of group travel.



Research

Method

In order to contact Group Travel Organisers, QA Research included a paper self-completion questionnaire in the February edition of Group Travel Organiser Magazine, had links to the survey sent to relevant contacts by Travel GBI and the East of England Tourist Board, along with access to the online version of the survey on www.grouptravelorganiser.com

Group Leisure Magazine, Group Travel Today and The Pass were all asked if they wanted to participate in the research. None opted to carry the self-completion questionnaire as an enclosure within their respective titles. Therefore, there is no market penetration or readership information comparing these other three titles.

However, a third of respondents in this survey read both Group Travel Organiser magazine and Group Leisure magazine (36%) or The Pass (37%), with 6% reading Group Travel Today as well as Group Travel Organiser magazine.

Taking into consideration the proportion of the market that is reading a multiple of the main group publications we can be confident that the distribution of the survey through one magazine reached a representative core of the GTO market place.

Questionnaires were distributed to 10,000 readers in the February edition of Group Travel Organiser Magazine.

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.

In total, 513 surveys were completed and returned. This is a statistically robust sample upon which to base conclusions and strategic decisions.

The questionnaire was designed by QA Research in conjunction with Group Travel Organiser magazine.

Some questions allowed for a direct comparison with the results from 2002 and 2006.

If a comparison was possible, any change is reported on as **Trend Analysis**.

Where appropriate, QA has added our own analysis and opinion of the findings throughout the report. This will often be found following the trend analysis with text in a grey box titled **Opinion** to differentiate it from the factual data.



Please note where relevant we have analysed the data using one or more of the following ways.

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.

Percentages have been rounded to the nearest whole number. Various questions also included multiple responses. Please note that for these reasons the results might not add up to exactly 100%. These instances are clearly marked in the text.



Executive Summary

- The GTO market remains fairly static in size (c11, 000 organisers) with a slight decrease in the value of the market (£142 million), caused in part by groups undertaking more day trips instead of short breaks than in 2006.
- The core GTO market continues to be made up of over 55s. What is not known is if the appeal of group travel is generational or related to chronological age; will younger age bands who are currently not members undertake group travel as they get older?
- Amongst current GTOs the market is still active and shows a small net increase (+13%) in the numbers whose members have undertaken more visits over the last few years than less.
- Consistent with previous research, word of mouth marketing and personal experiences are the key influencers on decision making on trips.
- Although there has been a sharp increase in online usage as a source of information, traditional marketing approaches (e.g. print) are still used by a larger number of GTOs. Therefore a broad mix of marketing approaches will be required in the foreseeable future to reach this market.
- The proportion of UK group visits which are day trips has increased at the expense of short breaks, with longer breaks remaining static since 2006.
- GTOs book and travel throughout the year, although spring and autumn are when most trips are undertaken. The GTO market can help extend the 'season' by bringing in valuable revenue at quieter periods.
- 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 predominately looking for new experiences be it from visiting somewhere new or going back to a familiar destination which is offering something different.



Points to consider

To increase your share of the GTO market...

- Destinations and attractions which show a clear understanding of the needs of GTOs and reflect these in their groups marketing, their interactions with GTOs during an enquiry, booking and reflect this in the product offer itself are more likely to attract group visits and subsequent positive word of mouth recommendations.
- Developing products / strategies to get GTOs to stay overnight or longer will result in greater economic benefit for destinations from the additional secondary spend.
- Given the influence of personal recommendation, marketers should look to utilise this source of 'free' marketing by devising strategies to ensure their destination or attraction is proactively and positively recommended by GTOs rather than relying on this happening by chance.
- GTOs want to fill their trips quickly so general marketing activities which raise the profile of a destination and/or attraction amongst the general public can also create a receptive audience amongst members and give GTOs confidence that a trip will appeal.
- Destinations and attractions who already attract a large group market need to either develop new products or at least create the perception of offering something new by packaging and themeing their offer differently.
- Use this report to help with planning and developing ideas on how to increase your share of this stable and lucrative market.

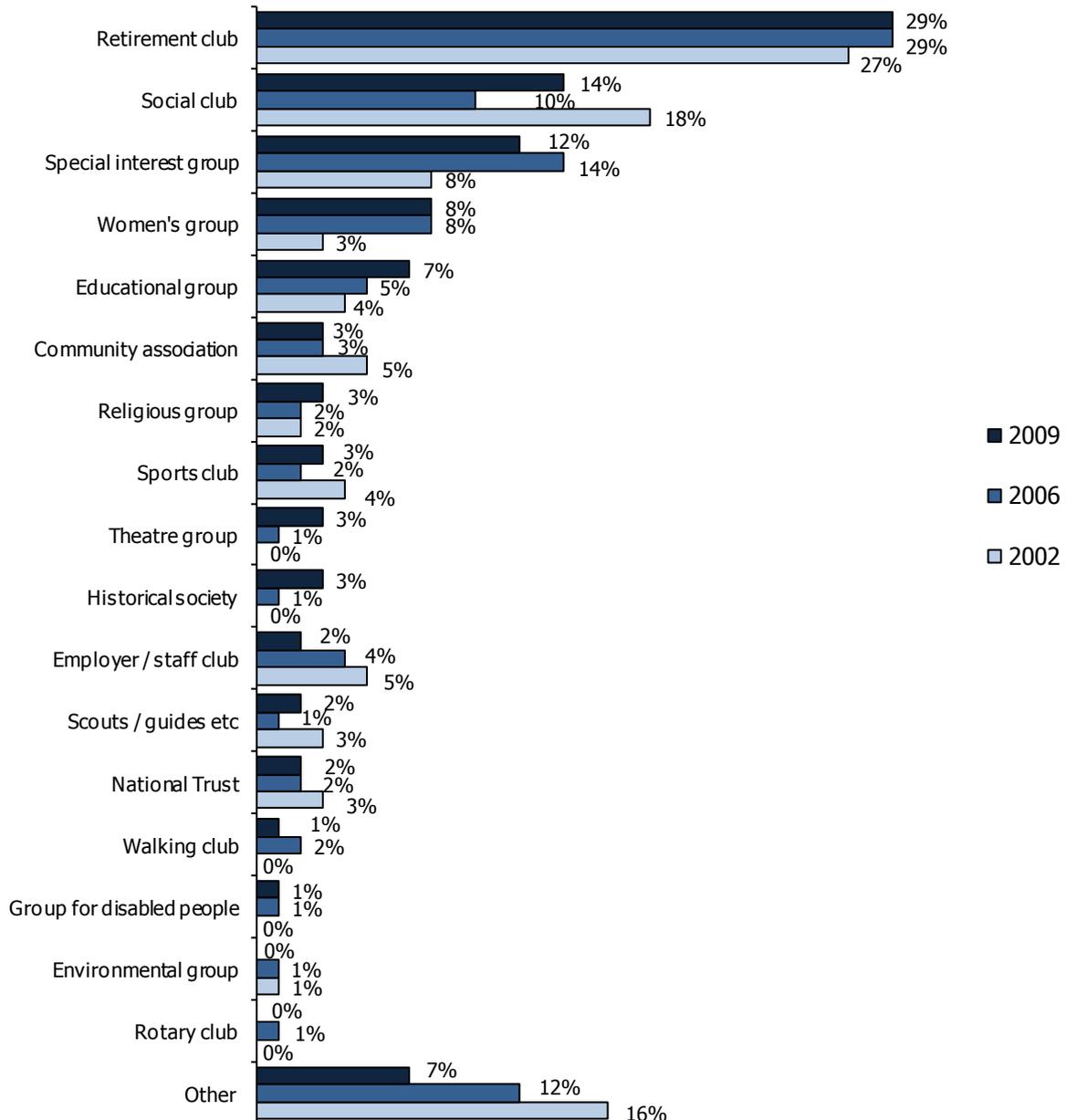


Key Findings

1. Profile of the GTO Market

1.1 Type of group travel organisation

GTOs were asked which type of group travel organisation they worked for or act on behalf of.



Base: 506, multiple responses.

Trend Analysis

Overall there is a similar proportional breakdown of types of groups as in previous reports. Retirement clubs retain their primary position as comprising the highest proportion of groups GTOs act on behalf of.

Opinion

The GTO market comprises a diverse collection of interest groups. Although retirement clubs still remain the main party type there are also a very broad range of other niche interest groups who are having trips organised for them.

The similar proportional breakdown as in previous research suggests a relatively stable market.

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 being 321, the median 120 and the mode 100 members in their organisation.

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

The average (mean) number of people on a group trip was 52; with a median figure of 43 and a mode of 50.

Trend Analysis

The group size remains fairly constant with the mean average group size going on trips in 2002 and 2006 both being 50.

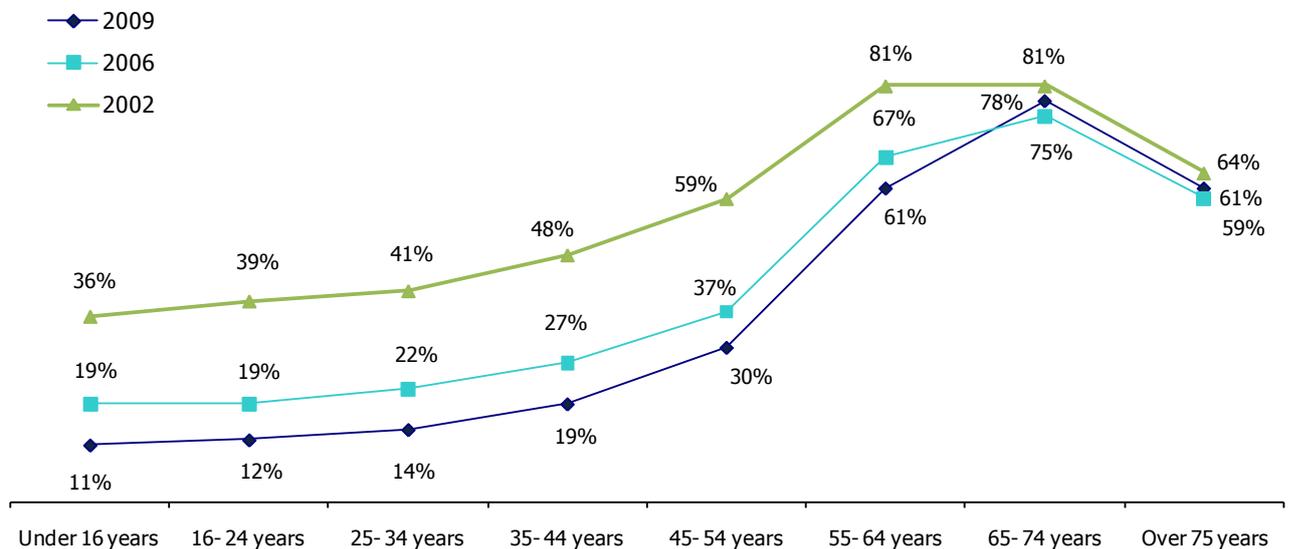
1.3 Market size

Taking the readership figures of Group Travel Organiser and Group Leisure Magazine the number of group travel organisers is estimated to be around 10,000.

The audit ABC figures for July 2007 to June 2008 show that Group Travel Organiser has an average net circulation of 9,896 and Group Leisure Magazine has 10,819¹.

1.4 Age of group members

Respondents were asked which age ranges their members tend to fall into.



Base: 513, multi-response

The highest proportion of members (78%) is still within the 65-74 age bracket, a small 3% point rise from 2006.

Trend Analysis

The chart suggests the core GTO market continues to be amongst over 55s, with the percentage of members in these age bands remaining fairly steady.

¹ Since the last ABC report Group Travel Organiser's average net circulation has been audited at 9,833 (July 08 – June 09) but Group Leisure have resigned their membership of ABC so no comparative circulation data is available.

However, there has been a further drop since 2006 in those in all age bands under 55 who are GTO members which in itself fell from 2002.

Opinion

Is the appeal of group travel generational or related to chronological age? The research does not tell us whether those in younger age bands who currently do not undertake group travel are likely to become GTO members when they get older or has there been an attitudinal and behavioural shift which will make younger people remain more independent travellers rather than opting for group travel when they get older.

2. Volume of trips

2.1 Change in the volume of trips

GTOs were asked about the broad change in the number of visits their group had undertaken over the last few years.

Nearly three quarters (71%) had done about the same, 21% of groups had done more and only 8% had done less visits.

This net change (+13%) suggests the GTO market is still active and has potential to grow further.

2.2 Volume of trips in the previous 12 months

Respondents were asked how many UK trips they had taken in the last 12 months.

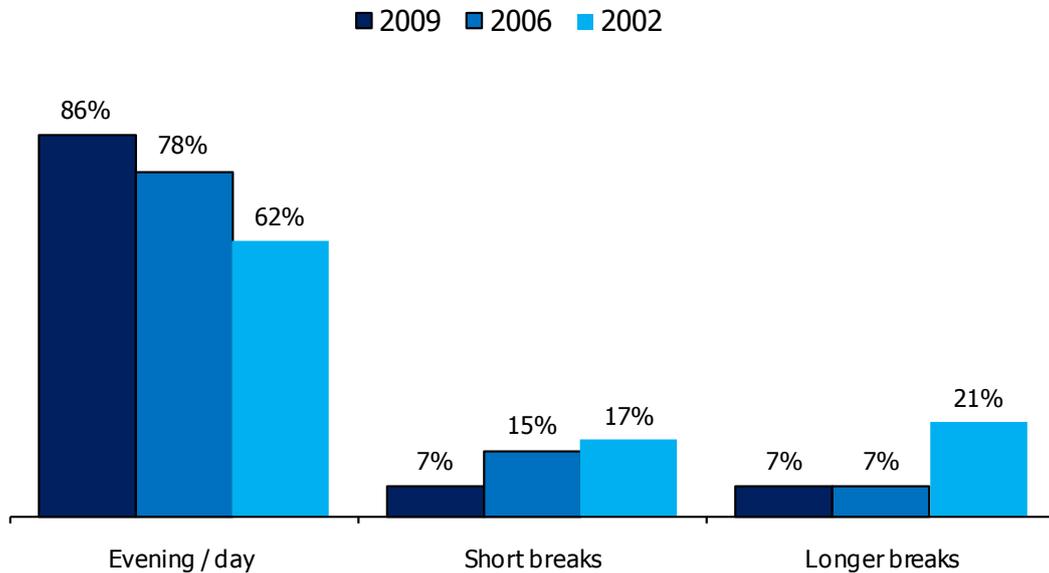
Calculating the average number of UK group visits GTOs had organised in the previous 12 months we found:

- the mean number of trips organised was 12.5
- the mode was 1
- and the median 3 visits per year.

Although the largest proportion of GTOs organise just a single UK trip per year, 54 (or 1% of all GTOs) organise 20 or more trips a year, with five of these organising between 100-200 trips a year.



The chart below shows the proportion of UK visit types by day / evening trip, short breaks (1-3 nights) and longer breaks (4 nights+) undertaken in the last 12 months compared to 2006 and 2002.



Base: 507

UK day / evening trips make up the vast majority (86%) of trips that GTOs undertook in the UK during the last 12 months.

When breaking down the proportion of evening and day trips we found that evening trips accounted for 20% and day visits 66% of trips.

Trend Analysis

The proportion of short breaks being undertaken by GTOs has decreased by 8% points since 2006 whilst the number of day / evening trips has increased by the same percentage.

Opinion

GTOs appear to be cutting back on the number of short breaks they are organising and replacing these with day long excursions. This may be a result of the current economic climate, although the proportion of longer breaks has remained static.

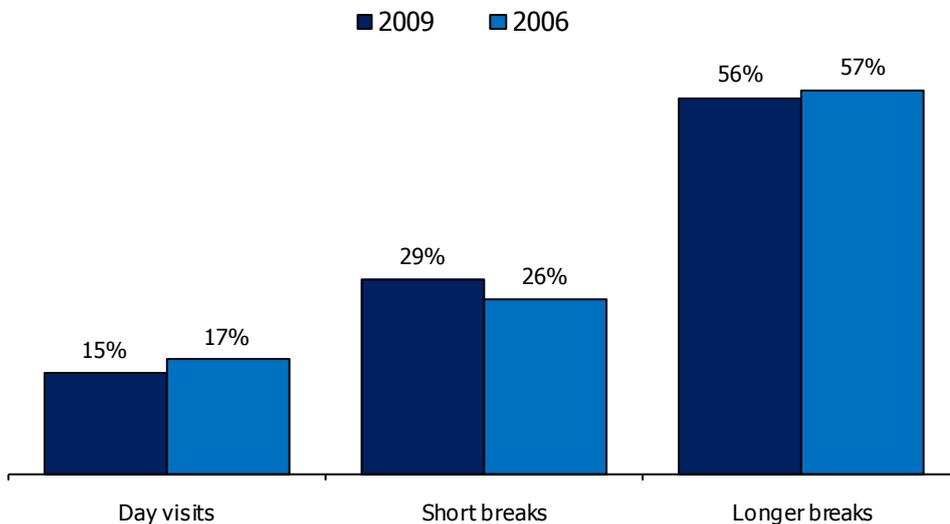
Overseas trips

A third of GTOs undertook an overseas group visit in 2008.

Calculating the average number of overseas group visits GTOs had organised in the previous 12 months we found:

- the mean number of trips organised was 2.6
- the mode was 1
- and the median 1 visit per year.

The following chart shows the proportions of overseas visit types by day visits, short breaks (1-3 nights) and longer breaks (4+ nights) undertaken in the last 12 months compared to 2006.



Base: 169

Amongst those undertaking an overseas group visit, the largest proportion (56%) of the overseas trips tend to be longer breaks of four or more nights.

Trend Analysis

The composition of the overseas GTO market remains very similar to 2006 with longer breaks comprising the largest proportion of group visits, followed by short breaks and then day visits.

Opinion

Visits which include an overnight stay have considerably more economic benefit for a destination in terms of secondary spend.

Therefore, further research may be required to understand the reasons why GTOs are reducing the proportion of short breaks they are organising.

It may be a result of the present economic climate but also could be due to other factors such as perceptions of the product, price or awareness of the offer.

Given the proportion of GTOs undertaking day trips, destination managers targeting groups should think about strategies that maximise the use of their attractions both during the day and also in the evening, increasing the depth of the offer and perceptions of value for money to help extend dwell time and spend.

2.3 Travel time

The average amount of time (in hours) groups travel in one direction to get to a destination for a day visit in the UK is:

- Mean 2 hours and 55 minutes
- Median 2 and a half hours
- Mode 2 hours

Opinion

Travel times can be used by attractions and destinations to target relevant GTOs based within the average drive times.



3. Value of the GTO Market

3.1 Average spend by type of UK trip

Respondents were asked for the total average spend per person on different types of UK group visits.

The table below shows the average spend per person on a UK group visit for evening and day trips as well as short and longer breaks.

Type of UK trip	Average spend per person
Evening trip	£27
Day visit	£26
Short break	£177
Longer break	£313

Trend Analysis

When calculating the average overall daily spend, which takes all types of trips into consideration, we estimate that groups are spending £46 per person on average. This figure is slightly down on 2006 when the average was £48.

This may be as a result of groups undertaking more day visits and fewer short breaks than they did in 2006.



3.2 Overall value of the UK GTO market

The steps taken to calculate the value of the groups market as represented by GTOs has included:

1. Establishing the number of visits organised in the last 12 months
2. Apportioning the proportion of group visits to evening trips, day visits, short and longer breaks
3. Calculating the number of active group visit days per group
4. Establishing the size of groups on trips
5. Establishing overall daily spend considering all types of trips in the calculation
6. Calculating group daily spend
7. Calculating group annual spend
8. Estimating the size of the GTO market to be 11,000
9. Calculating the annual value of the GTO market

Statistic	2009	2006	2002
Active group visit days	5.6 days	7 days	7.2 days
Size of group	50	50	50
Daily spend per group member	£46	£48	£50
Group daily spend	£2,300	£2,400	£2,500
Group annual spend	£12,880	£16,800	£18,000
Group market size	11,000	11,000	10,000
Annual value of UK GTO market	£142m	£180m	£180m

The findings suggest that the value of the UK GTO market has declined slightly since 2002.

As seen previously the proportion of short breaks being undertaken from 2006 has decreased with an increase in day visits. This has resulted in a decrease in the number of active group visit days and ultimately the value of the market.

Opinion

Despite the slight decrease the value of the GTO market is still considerable. Destinations need to work hard to convince GTOs that a short break as opposed to a day visit is worth doing by making them aware of how comprehensive the offer is, the value for money and the benefits of staying longer.



3.3 Average spend by type of overseas trip

Respondents were asked for the total average spend per person on different types of overseas group visits.

The table below shows the mean average spend per person on an overseas group visit for evening and day trips as well as short and longer breaks.

Type of overseas trip	Average spend per person
Day trip	£49
Short break	£246
Longer break	£665

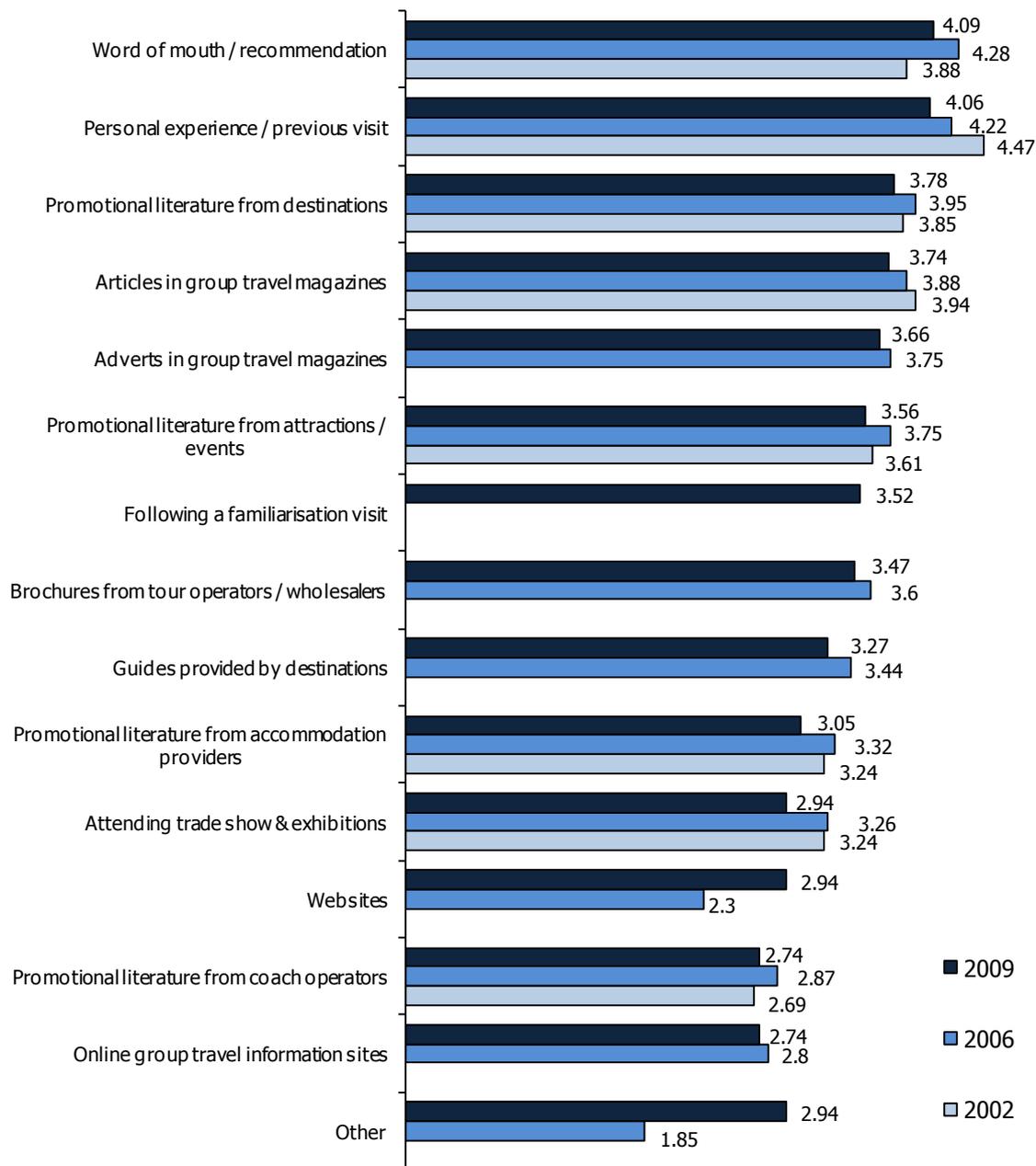


4. Information Sources

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

The table shows the mean averages for each information source (out of a total of five), ranking them in order of importance based on the 2009 findings.

4.1 Important information sources when deciding on group visits



Base: 513

Trend Analysis

Word of mouth remains the most important information source followed closely by previous experience.

Although currently relatively low down the list of information sources compared to others, websites have dramatically increased in importance since similar research in 2006 (41% in 2009 rated it as 'important' or 'very important' compared to 15% giving the same ratings in 2006).

Opinion

All the information sources can have a role to play in attracting GTOs.

With the importance of word of mouth recommendations, destinations and attractions not only need to ensure a good experience but should then devise strategies to proactively manage to this turn it into a tangible recommendation rather than leaving it to chance.

The most important information sources (e.g. word of mouth, personal recommendations) suggest GTOs need to trust that any visit they are organising will be good and a safe 'bet'. They are more likely to be confident of this if they have had a previous positive experience themselves or have talked to others they trust who have.

GTO publications, in conjunction with destinations and attractions could look to assist GTOs by capturing or encouraging feedback and then promoting where GTOs can source reviews and comments from other GTOs (i.e. in the style of 'trip adviser')

Traditional marketing approaches such as brochures, articles in magazines and print advertising are still most commonly used and their importance should not be forgotten but the biggest increase in the last three years is from websites.

4.2 Attendance at trade shows and exhibitions

GTOs were asked which if any travel shows or exhibitions they had attended in the last 12 months.

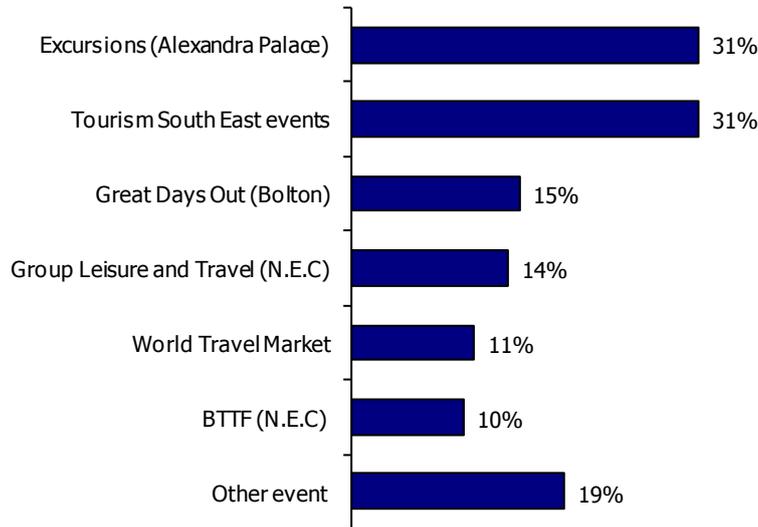
A total of 37% of GTO surveyed had attended a trade show or exhibition during this time period.



Research

The percentages for which ones have been calculated based only on those who attended any travel show or exhibition.

A total of 69% of attendees went to only one trade show or exhibition with 31% attending two or more.



Base: 192, multiple response

Trend Analysis

The percentage of GTOs attending trade shows and exhibitions has in many cases remained static but declined in some areas since 2006 (e.g. in 2006 23% attended Great Days Out Bolton, 15% World Travel Market and 25% BTF).

Opinion

Given that GTOs who visit trade shows and exhibitions tend to visit only a single one the attendees at each event are likely to be different. However, destinations and attractions will also need to utilise a broad mix of marketing methods to reach the large proportion of non-attendee GTOs.

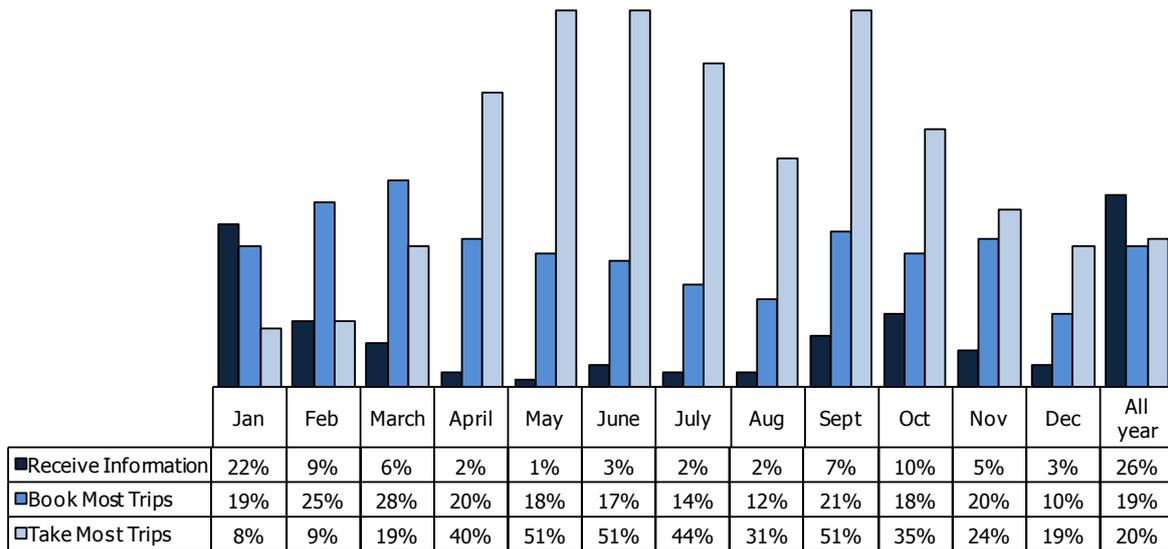
Destinations and attractions should decide which event(s) to have a presence at depending on their offer and if it falls within the average drive times GTOs attending that event are likely to undertake.

Trade shows and exhibitions can be a good way to promote your products and in particular engage with GTOs to discuss and understand their needs in more detail to help shape your offer and should be used by destinations and attractions to collect information as well as impart it.



4.3 Key months for information, booking and travelling

GTOs were asked when they preferred to receive information, when they were most likely to book trips and when they tended to take most trips.



Base: 457 receive info, 473 book, 474 take most trips - multiple response question.

Whilst the highest proportion of GTOs (26%) were happy to receive information all year round, information at the start of the year in January (22%) is a better month for GTOs to receive information than any other.

Bookings take place throughout the year although Spring (February-May) and Autumn (September to November) are key times to book.

The months when most trips are undertaken are early and late summer. This may be a reflection of the older age profile of most GTOs who are looking to go on a visit when there is a higher chance of good weather but avoiding the busy school holiday periods.

Trend Analysis

The same pattern emerged in previous research in 2006 and 2002 which showed a level of activity throughout the year but with February, March and April being key months for booking and April, May, June and September the key months for taking trips.

Opinion

Marketing and sales activity to GTOs can and should take place throughout the year but higher proportions are likely to be receptive to receiving information and offers in January.

It takes most GTOs time to fill a trip so information is needed a relatively long time in advance of going.

Providers need to ensure they have sufficient staff to advise GTOs and take bookings especially at key times.

As GTOs tend to visit outside of the school holiday period this should offer a useful way to help destinations extend the season.

5. Needs and wants of GTOs

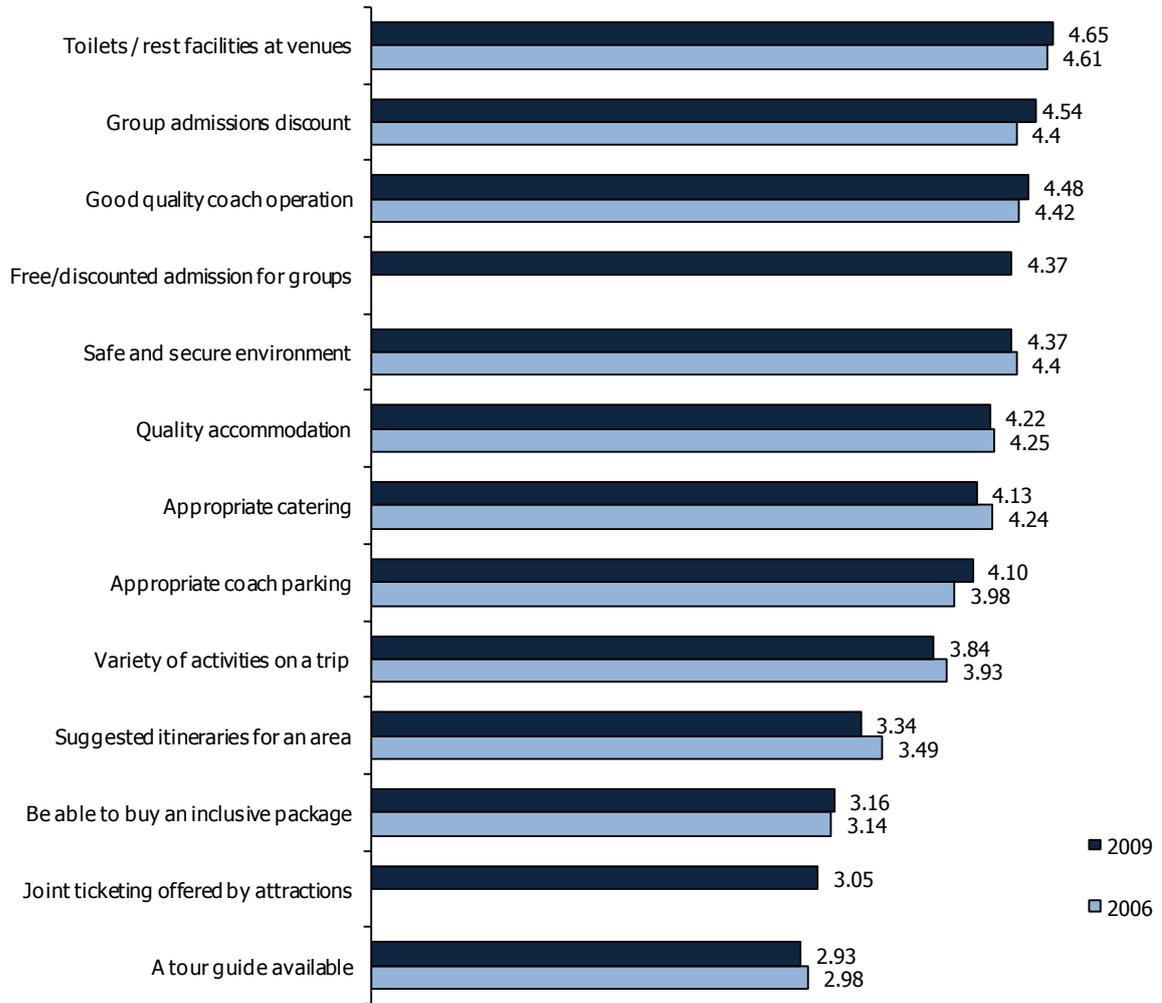
5.1 Importance of services and features to groups

GTOs were asked to rate on a scale of 1 to 5 (with 1 being 'not important' and 5 'very important') the importance of various services and features for themselves or their groups.

The results have been shown as mean averages (out of a total of five), with the chart overleaf ranking them in order of importance based on the findings in this year's survey but also showing comparisons to the 2006 findings.

None of the services and features were deemed of no or little importance but the ones which are likely to make most impact are practical elements (e.g. availability of toilets, good quality coach provision) and financial benefits (e.g. group discounts).





Base: various from 435 -496

Opinion

The range of factors scoring on average over 4 highlight the multitude of highly important services and features sought by GTOs which destinations and attractions need to satisfy.

The high position of many practical features such as toilets at venues, a safe and secure environment, the quality of accommodation and also that of the coach operation suggest GTOs are looking for reassurance against what may be considered basic 'hygiene' factors which may have negatively impacted on previous trips they have organised.

Financial savings are also important with GTOs wanting and in some cases expecting a discount for bringing a group.

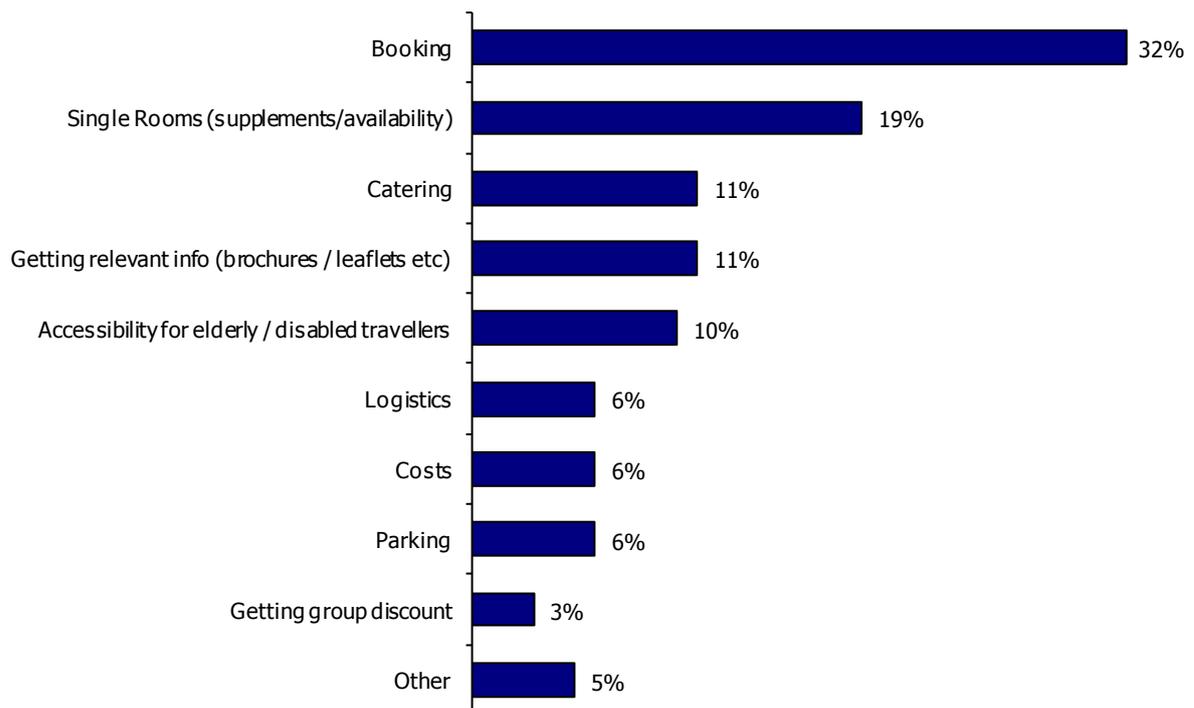
Once GTOs are reassured over the 'basics', the findings later on in this report suggest they are often also looking for 'something new' or different to attract them to a destination or attraction.

5.2 Issues and problems

GTOs were asked in an open ended question what problems they regularly encounter when organising group travel. The verbatim answers given have been grouped together, coded and shown below.

Just over a third (34%) of GTOs either wrote in 'none' or left the question blank suggesting they had no major problems.

The table below has been calculated on those who answered the question and suggested one or more problems they face.



Base: 332, multiple response question

A few GTOs commented that they feel staff at destinations, hotels and attractions often do not understand or appreciate the needs of groups because they have no experience of group travel themselves.

The sorts of issues faced regarding booking are:

- Getting responses back promptly from venues when trying to organise a trip (e.g. prices, discounts, availability, disabled access), especially when this involves multiple activities
- Finding suitable accommodation which is big enough, has the required facilities and is within budget
- Filing up a coach to be able to confirm a provisional booking with many members committing to going later than they used to. GTOs, especially those taking older members can have problems when a member then drops out due to illness or health reasons.

The specific catering issues cited are:

- Obtaining information on where to go and eat in a large party in terms of which places take coach parties, which have sufficient room / staff and still can produce food of a high quality
- Getting information on disabled access and for those with older members if a venue will offer smaller portion sizes (and a discount).

Some of the problems with getting relevant information are:

- Receiving details far in advance to put together a package for members (e.g. prices for next season) with enough time to fill up the trip
- The lack of details on disabled access
- The unwillingness of some destinations and attractions to provide marketing materials GTOs can hand out to their members to sell a trip (e.g. leaflets and fliers)
- With several GTOs wanting "inspiration" of where to go and what to do.

Those mentioning access for disabled or elderly members tended to do this in broad generic terms but the specific issues mentioned were:

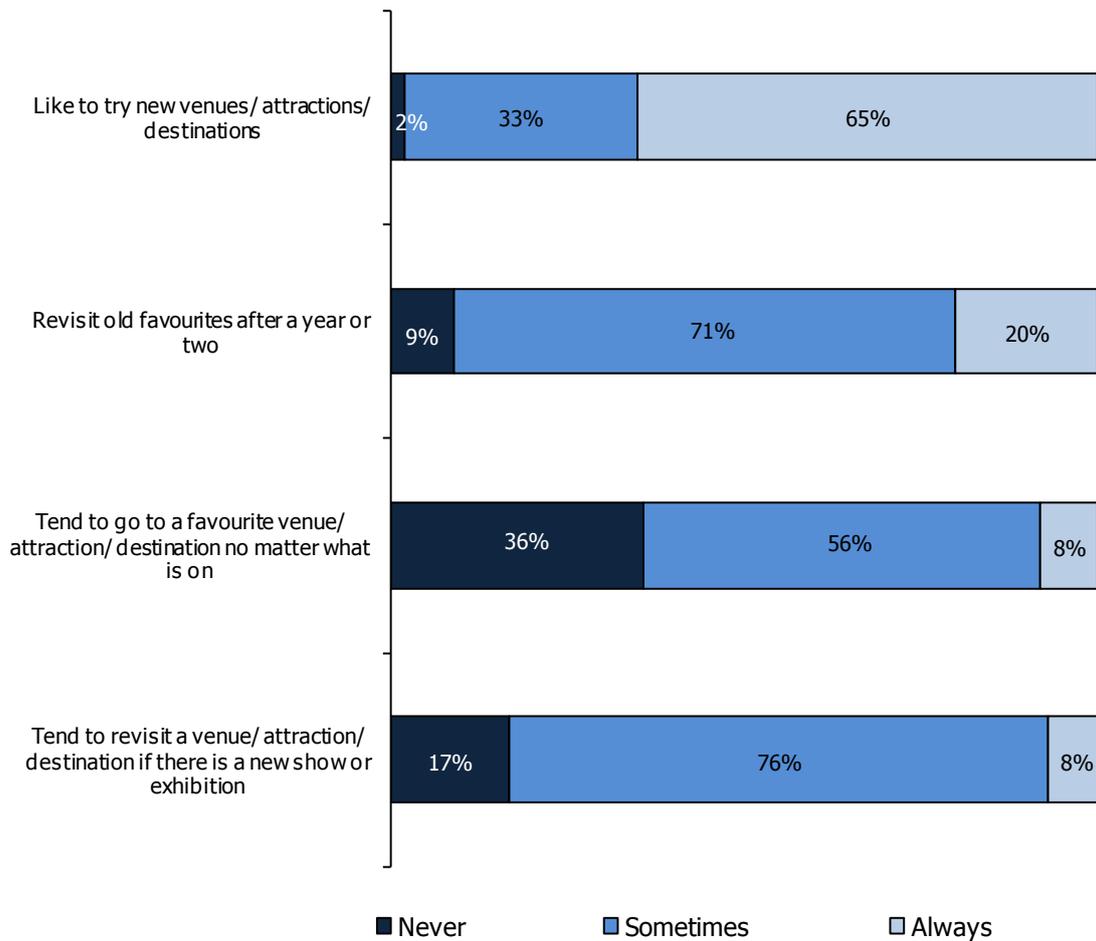
- The suitability of bathroom facilities
- The need to avoid long walks at hotels and attractions, information about which can often be difficult to obtain
- Disabled members being able to sit around group tables for meals.



6. Activities / Attractions

6.1. Return versus new visits

GTOs were asked to rate the opinions of their group against a number of statements. The question asked: 'does your group ...' followed by the sentences in the chart below.



Base: 454 - 493

More GTOs like to try new venues, attractions or destinations (65% always) than go back to a favourite place (8% always) especially if there is nothing new on offer.

Trend Analysis

The results are very consistent with the findings from 2002 and 2006 when 67% and 65% respectively also 'always' liked to try new venues, attractions and destinations.

The proportion of GTOs who 'always' revisit old favourites after a year or two has decreased from 25% in 2006 to 20% now.

Opinion

With the majority of the GTO market always looking for something new, this poses a challenge for destinations and attractions who have previously attracted large numbers of groups but an opportunity for those who have not.

Whilst you cannot always build or develop something new, destinations and attractions can create the perception of offering something new by packaging and themeing products differently.

With a sizeable minority of GTOs (20% always) who are open to revisiting old favourites after a year or two it is important to provide a memorable first visit and keep communicating with these GTOs to attract them back for a repeat visit.

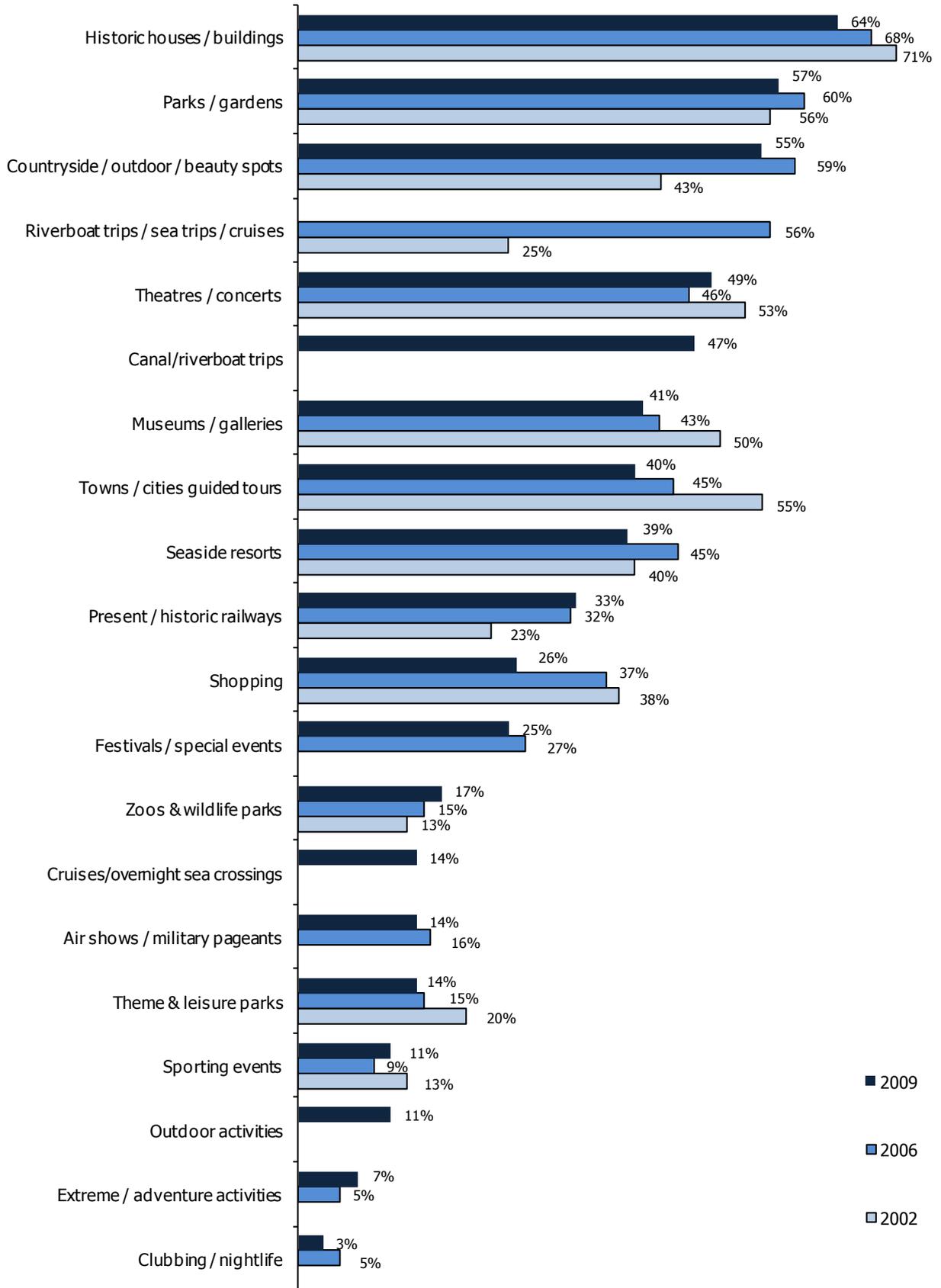
6.2. Appeal of various activities and attractions

GTOs were asked to rate on a scale of 1 to 5 (with 1 being 'not at all' and 5 'greatly') their groups level of interest in undertaking a variety of activities or visiting a range of different attractions on a group visit.

The scores in the chart overleaf show the combined percentage of GTOs who gave a score of either 4 or 5 (i.e. interested in visiting).

In this year's survey the previous category of 'river boat trips, sea trips and cruises' has been separated into two separate categories; 'canal / river boat trips' and 'cruises / overnight sea crossings'.



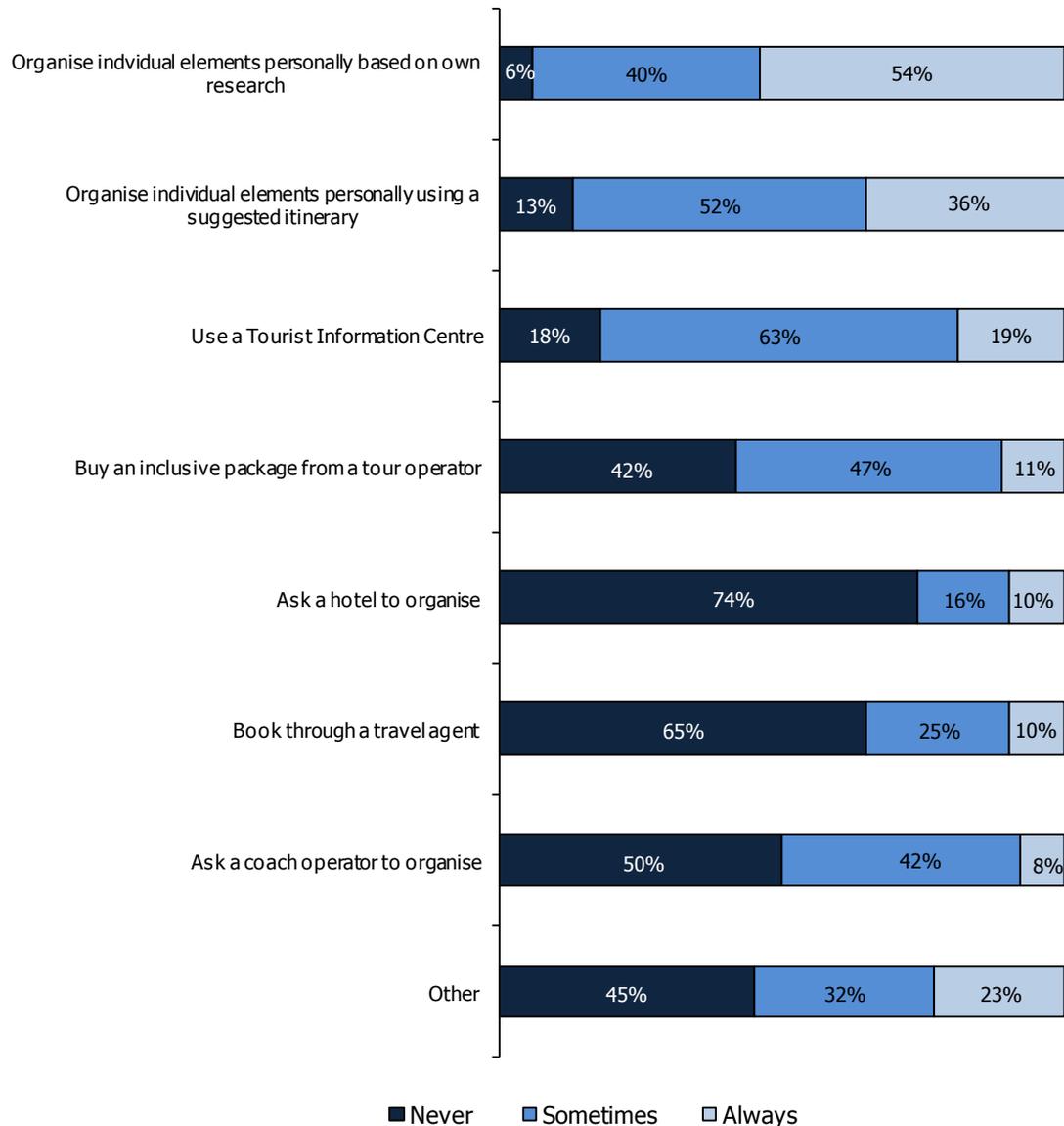


Base: 454 - 489

7. Booking Preference

7.1 Organising Group Travel trips

GTOs were asked how they organise and book group travel trips.



Base: 439- 481

GTOs show a strong preference for taking on the organisation themselves with more than half (54%) stating that they would 'always' organise individual elements personally based on their own research. This was followed by one third (36%) of all GTOs who would 'always' organise individual elements personally using suggested itineraries.

Trend Analysis

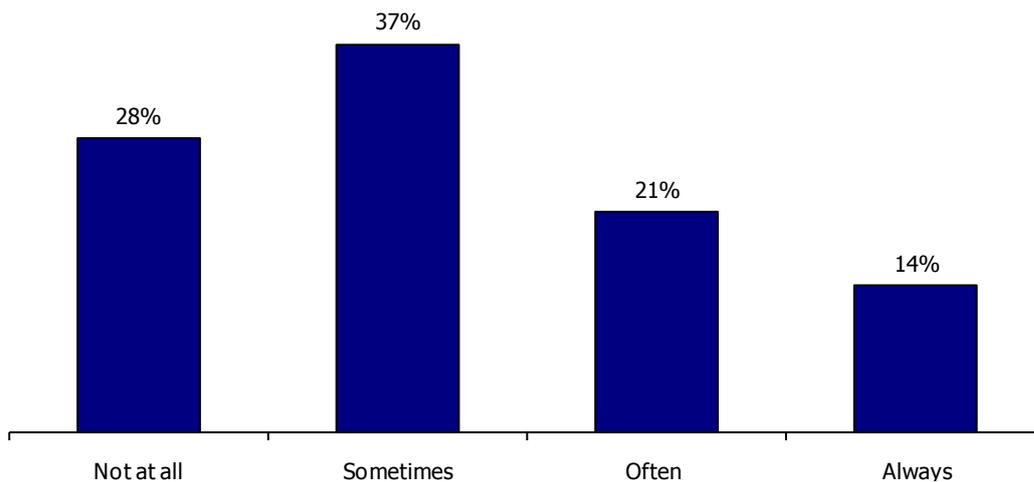
A very similar pattern emerged in 2006 with GTOs again showing a clear preference for taking on the organisation of trips themselves.

However, those always booking through a travel agent has increased by 6% points and asking a hotel to organise by 9% points since 2006, although the survey did not ask the reasons behind GTOs booking preferences so we do not know why these areas have increased dramatically.

8. Internet Usage

8.1 Current internet usage

Respondents were asked how often they use the internet to plan their group travel.

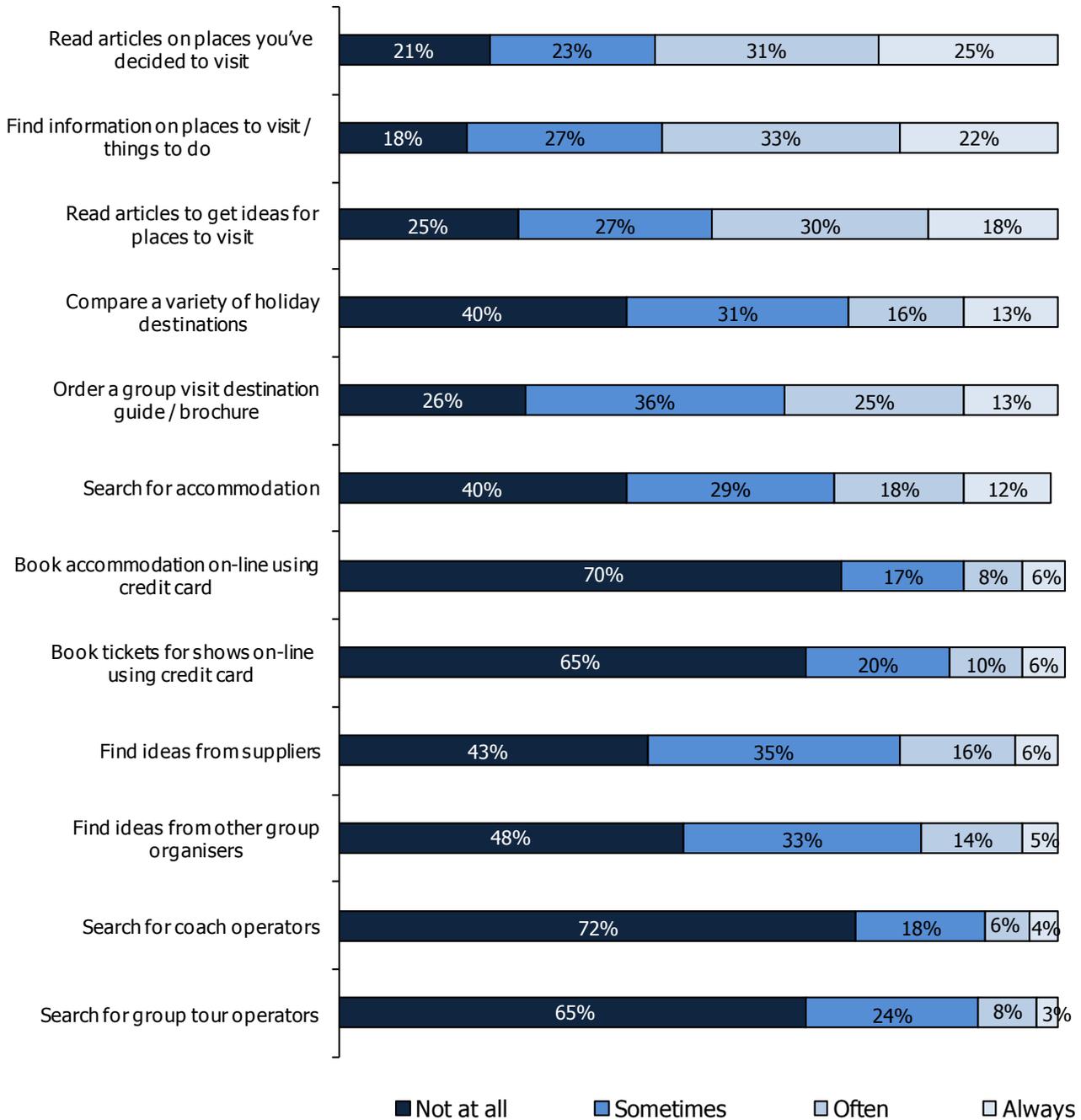


Base: 502

Only a third of GTOs (35%) currently frequently (often and always) use the internet as a resource for planning group travel.

8.2 Expected future usage

GTOs were asked, thinking about the next few years, what they expected to use the internet for when organising group travel trips.



Base: varies between 429 – 436

Given that 28% said that they currently 'don't use' the internet at all for organising group travel, the findings above suggest internet usage will

increase over the next few years (e.g. only 18% said they would 'not at all' use the internet to find information on places to visit / things to do).

The findings suggest that GTOs are mainly expecting to use the internet as an information source for ideas rather than a mechanism to book different elements of a trip.

Opinion

Although the internet is becoming more important for sourcing group travel information (see findings overleaf), in the foreseeable future destinations and attractions are likely to require both an online and physical presence with staff that can deal with requests, take bookings, and advise GTOs.

There appears to be a real reluctance currently to book tickets and accommodation directly online. Should providers want to move GTOs to using more online resources further research is required to understand the barriers and how these may be overcome.

It may be that for some functionality (e.g. find ideas from other group organisers) GTOs do not have any experience of or understand how the concept of how it may work or be useful to them. Some of the potential functionality may be popular in the future and useful in helping organise trips but needs explaining and promoting to increase awareness and usage. GTOs are unlikely to be early adopters of new online functionality.

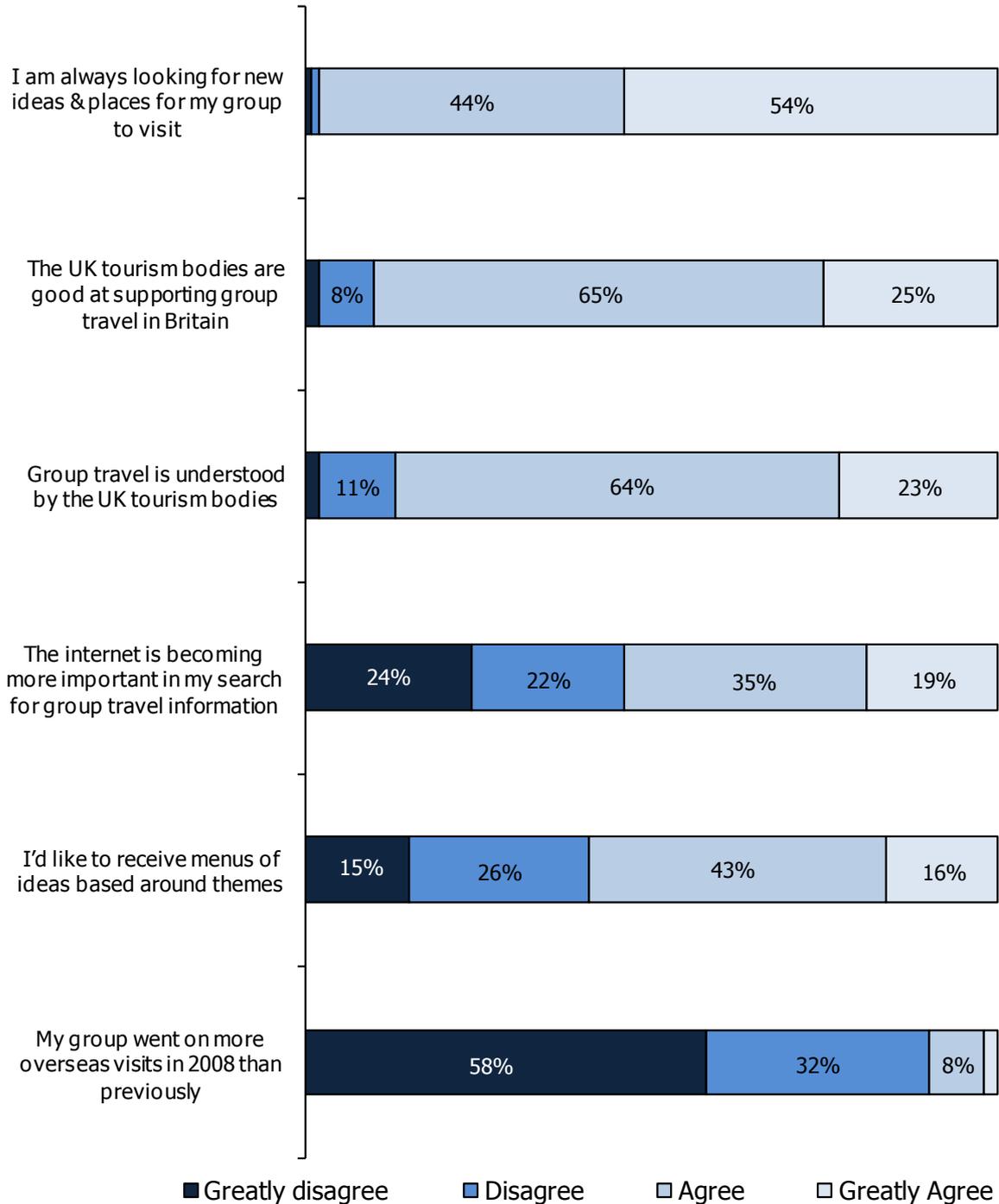
For providers of services such as coach operators and tour operators the findings suggest that to make GTOs aware of these services a more direct traditional sales approach will be required.



9. Future of the GTO Market

GTOs were asked a series of questions designed as statements to uncover their opinions about the future of group travel.

9.1 The future of group travel



Base: 398 - 489

Opinion

The results of this question reveal some interesting points:

In the research conducted in 2006 overseas group trips were considered to be becoming more popular (81% agreeing with the statement), where as in this more recent research only 10% of GTOs in 2008 went on more overseas trips than previously. Does this suggest the overseas group travel market is reaching a peak or is this more a reflection of the current economic situation?

GTOs are very receptive to new ideas and themed ideas; indeed they are actively looking for new experiences and places to visit (98% agreeing with the statement). Destinations which can market themselves in this way are likely to benefit.

GTOs appear to be happy with the support from UK tourism bodies who they feel understand this market and their needs (although 15% ticked the option 'can't say' for the option 'group travel is understood by the UK tourism bodies' and 13% gave the same response to the statement 'the UK tourism bodies are good at supporting group travel').

Destinations need to look at regularly re-packaging and refreshing their GTO offer, especially if the product itself remains the same, to attract groups from this not inconsiderable if rather static market. GTOs are seeking new ideas and places to visit but not averse to considering returning after a few years to a destination.



10. Optimising your share of the GTO market

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 will be running a day long seminar and workshop on 9th November 2009 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.

The full details are still to be confirmed but provisionally the day will include an overview of the research findings and what it means for you, tips from leading professionals working in the groups market, workshop seminars discussing solutions to some of the key challenges the sector faces in attracting GTOs, followed by a question time session with key players within the market.

If you want to receive more information about QA Research or the GTO workshop seminar specifically please contact Nick How, Head of Leisure & Tourism Research on 01904 632039 or email nick.how@qaresearch.co.uk

11. 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 researchers all have tourism industry experience which means they are able to add meaningful interpretation to any statistic or in-depth opinion.

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

QA Research employs members of the Tourism Society and the Tourism Management Institute.

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





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