



GROUP TOUR OPERATOR SURVEY RESULTS

November 8, 2021

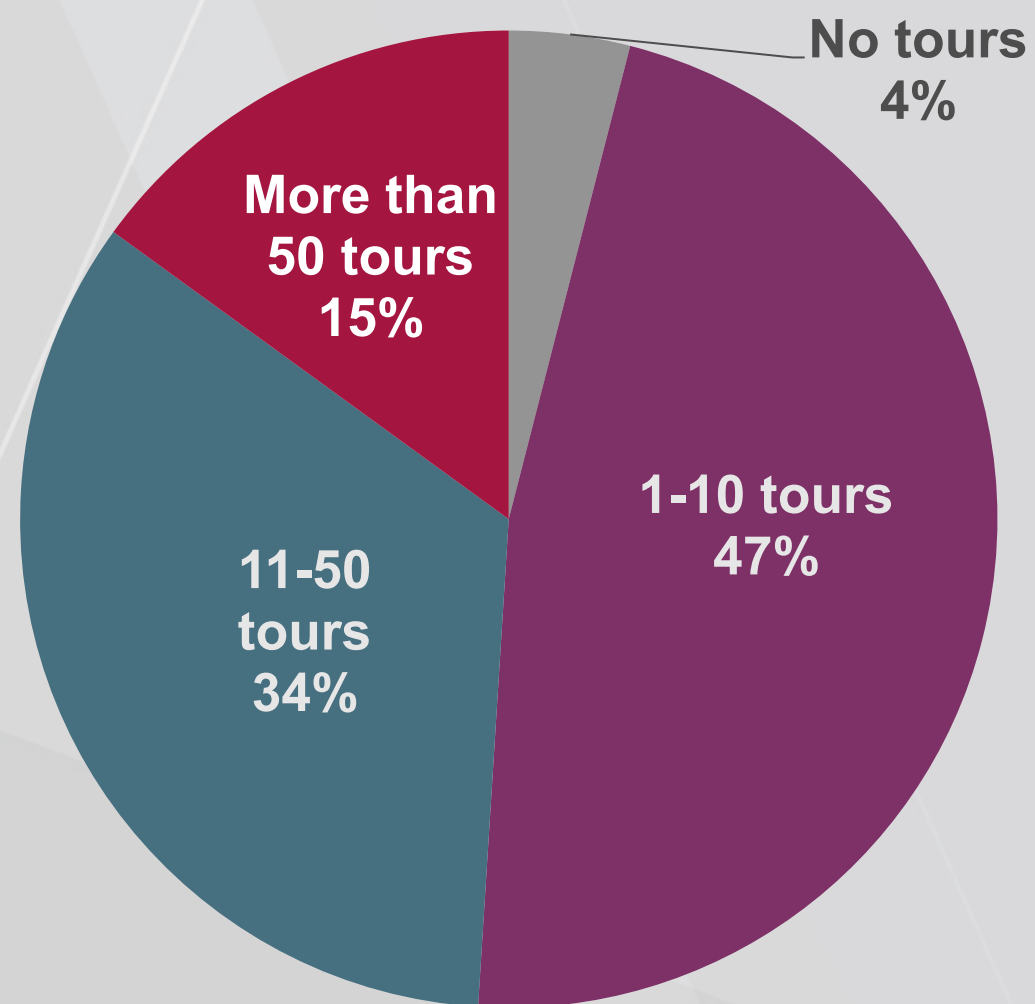
METHODOLOGY

- October 14-29, 2021
 - Looking at Fall 2021-Summer 2022 vs. 2019
- 136 operator responses
- Requirements:
 - U.S.-based company
 - Washington, DC tour within last 3 years

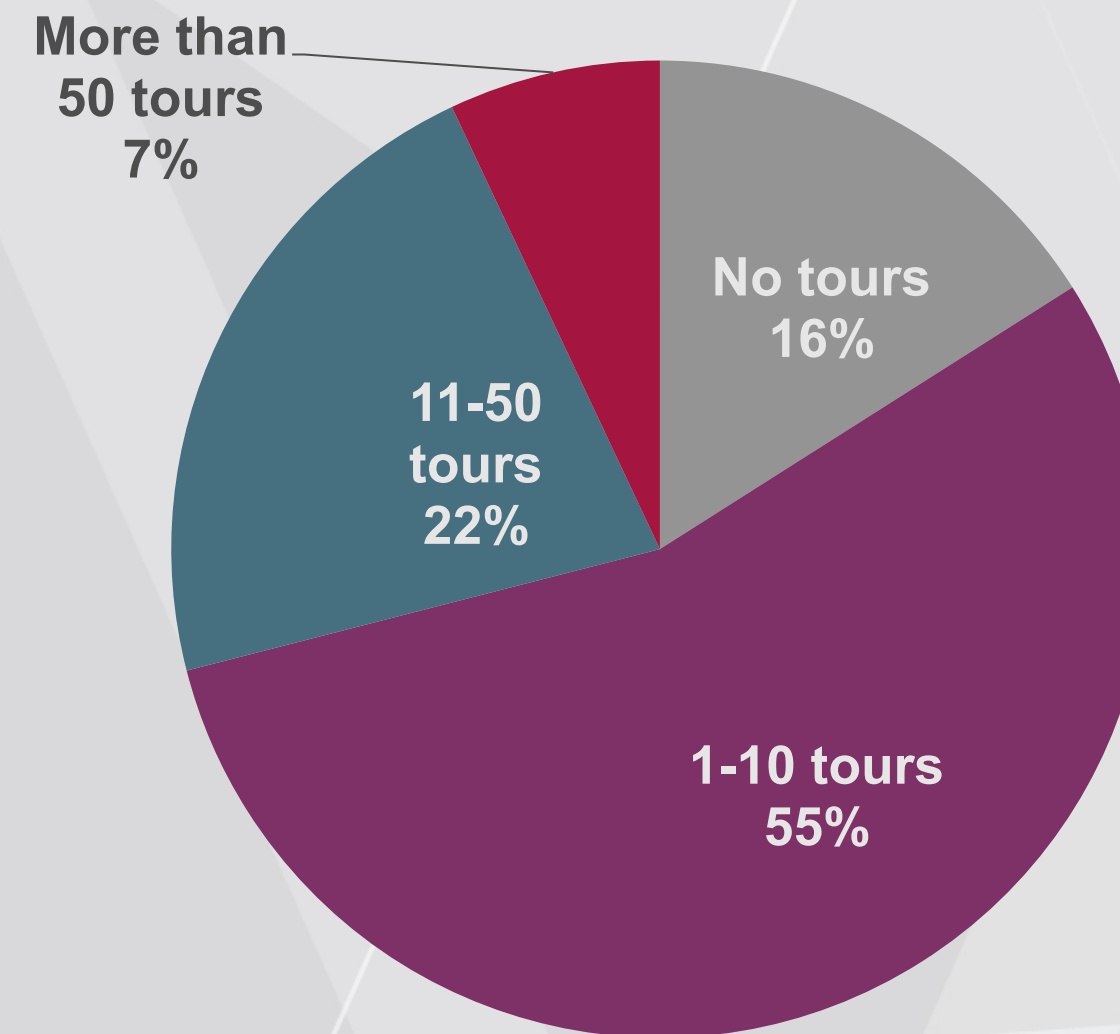
DOMESTIC TOUR EXPECTATIONS

FUTURE TOUR EXPECTATIONS: SPRING & SUMMER 2022

Spring 2022



Summer 2022

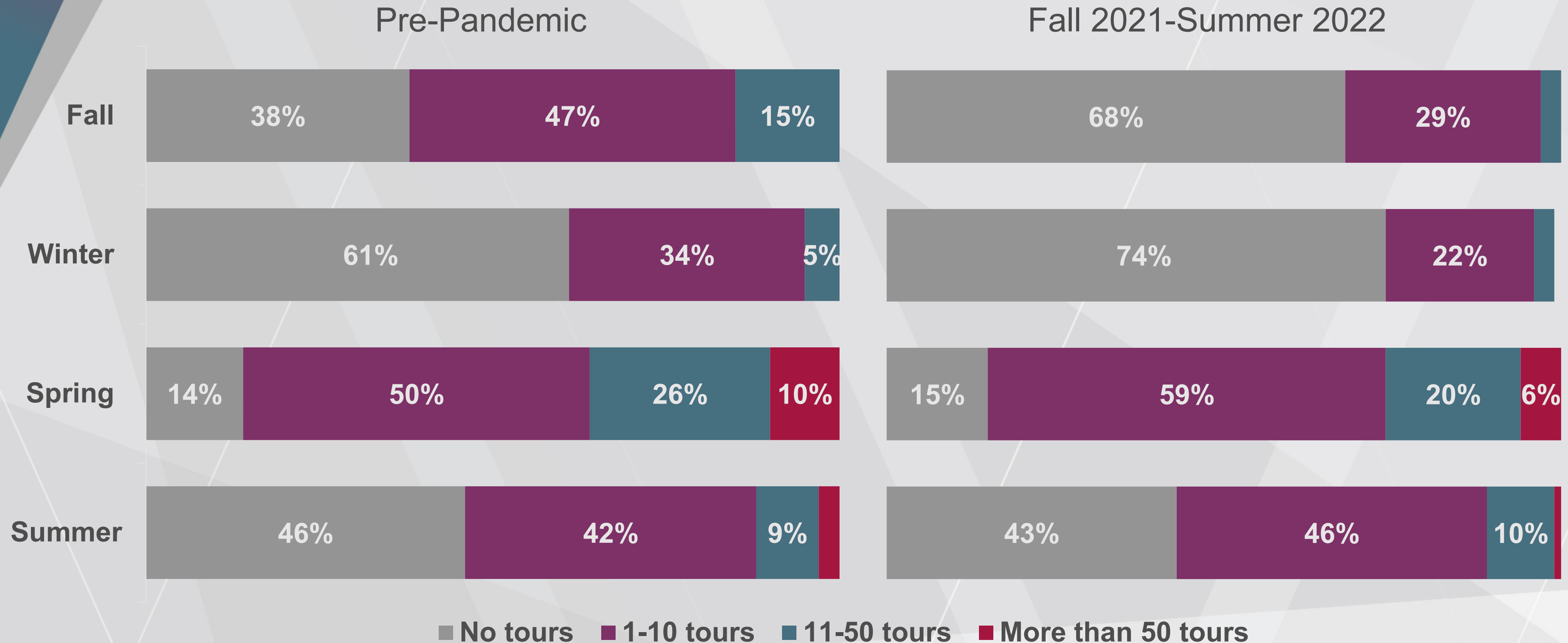


“How many tours do you currently expect to conduct within the U.S. in the next year?”

Base: All Operators

WASHINGTON, DC TOURS

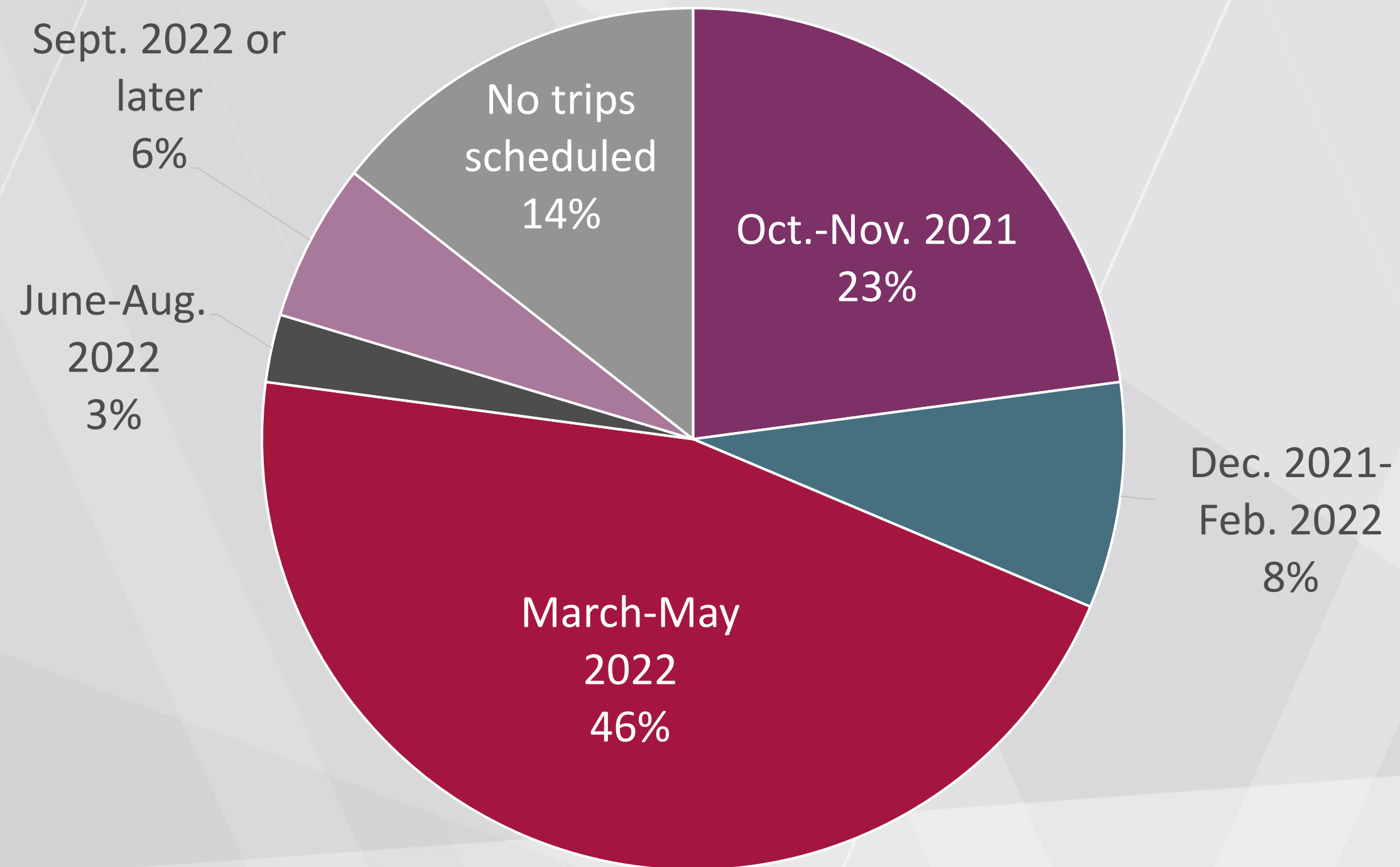
SEASONAL TOURS: WASHINGTON, DC



“How many tour groups did you operate in 2019/do you expect to operate in 2021-2022 during each of the following seasons in the Washington, DC metro area?”

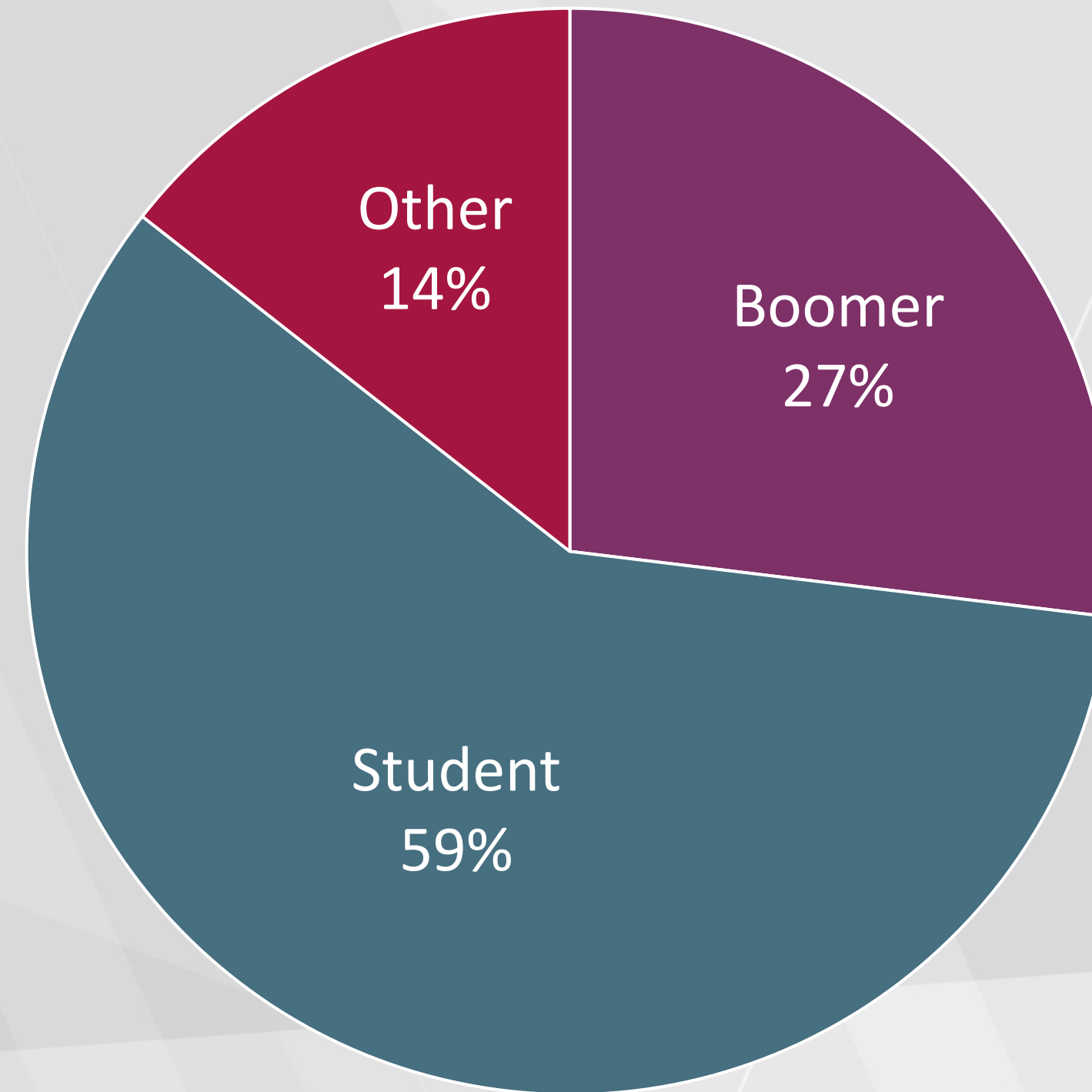
Base: All Operators

NEXT TRIP TO WASHINGTON, DC



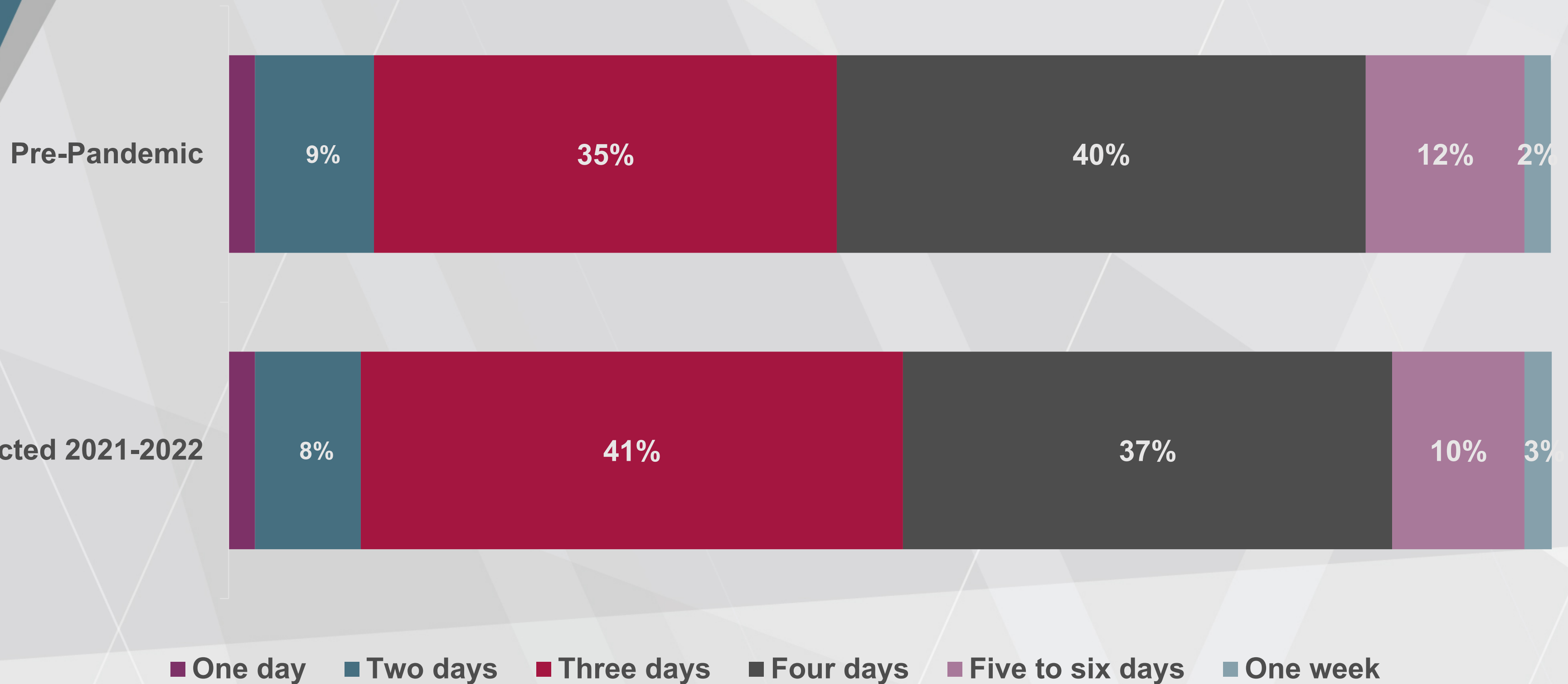
Base: All Operators

SHARE OF TOTAL TOURS: WASHINGTON, DC



Base: All Operators

LENGTH OF TOURS TO WASHINGTON, DC

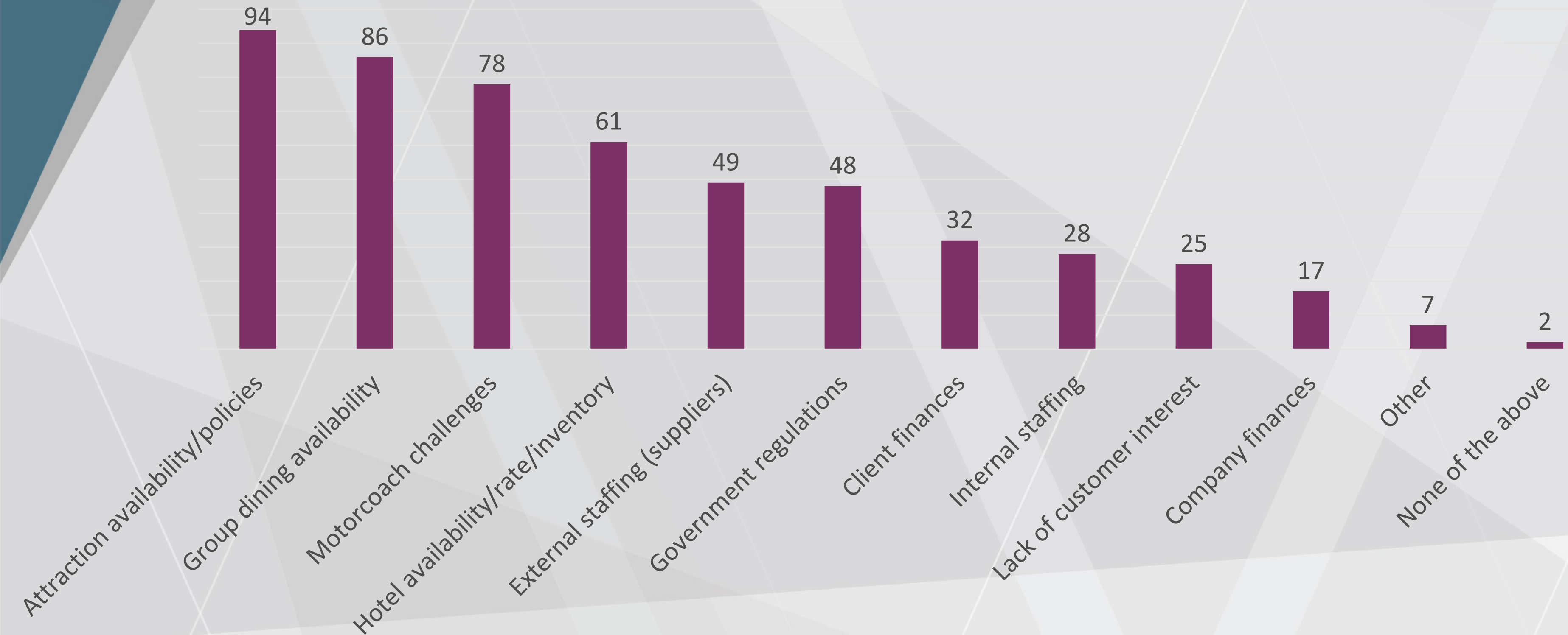


Base: All Operators

THEMATIC ADDITIONS

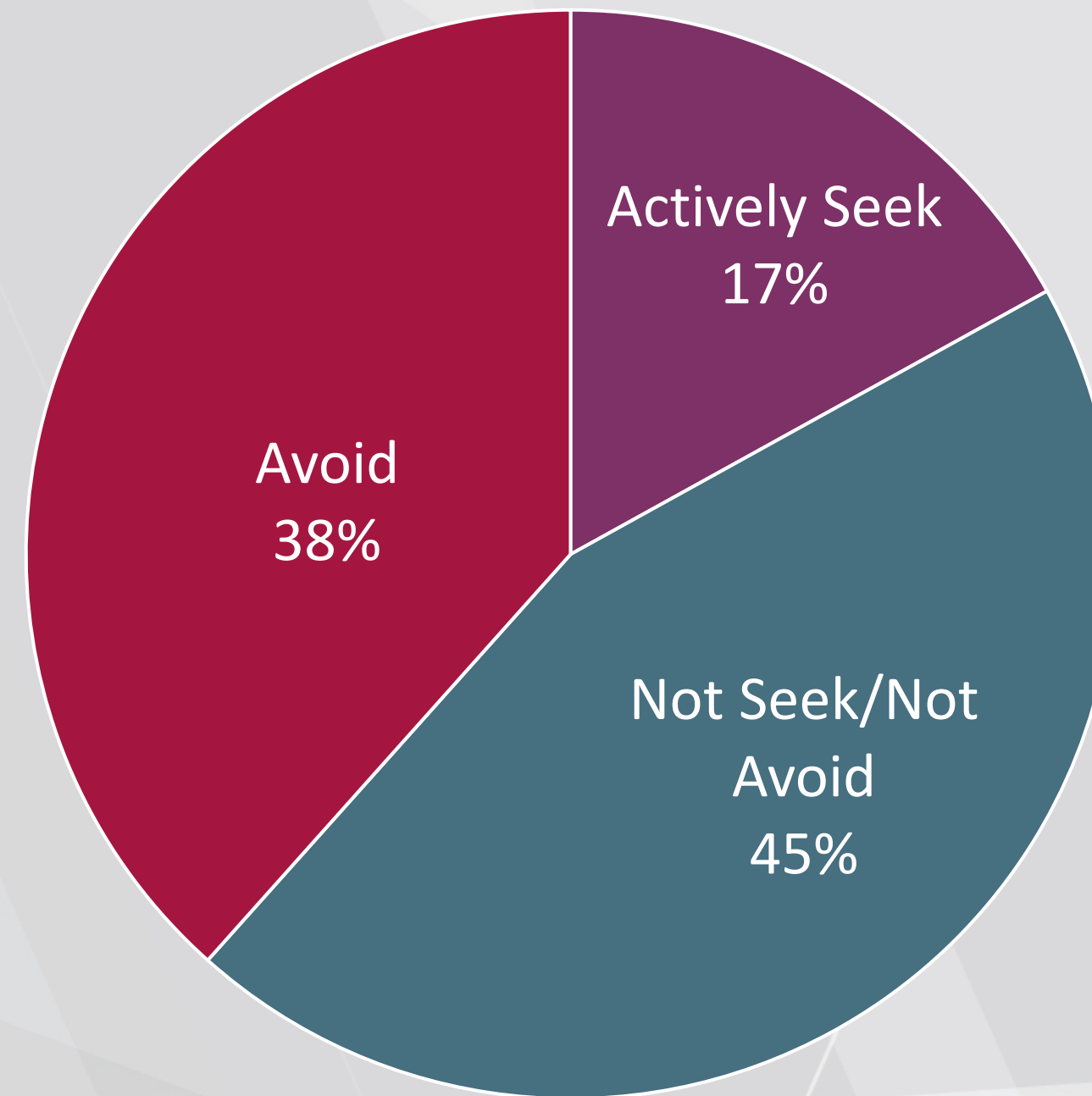
- Black history
- Diversity/social justice
- HBCUs
- Religious attractions

CURRENT TOUR CHALLENGES IN WASHINGTON, DC



Base: All Operators

ATTRACTIONS, RESTAURANTS, ETC.: RESPONSE TO VACCINATION REQUIREMENTS



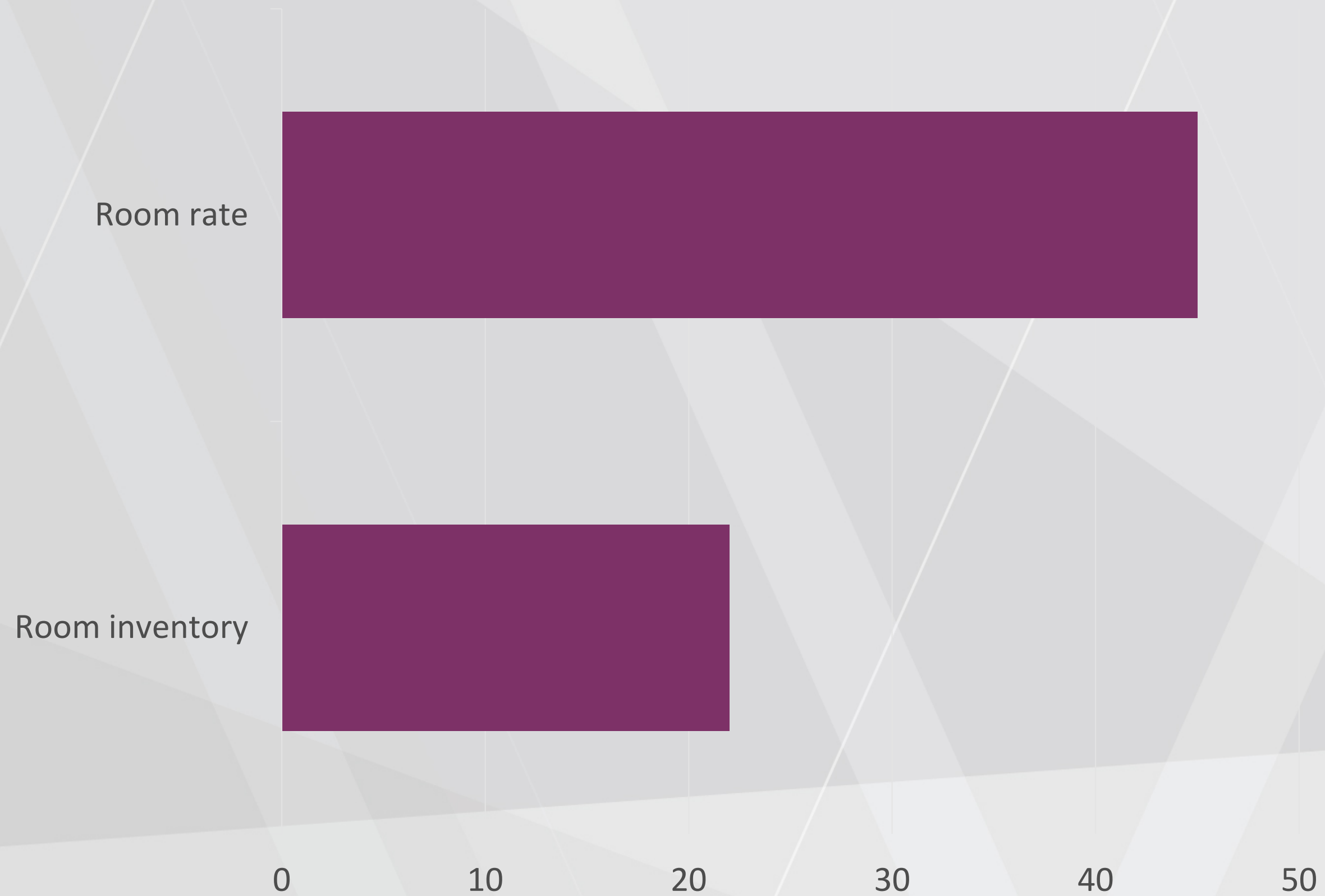
“Would you bring groups to attractions, restaurants or other locations in the Washington, DC metro area who require proof of vaccination or a negative test within 72 hours for entry?”

Base: All Operators



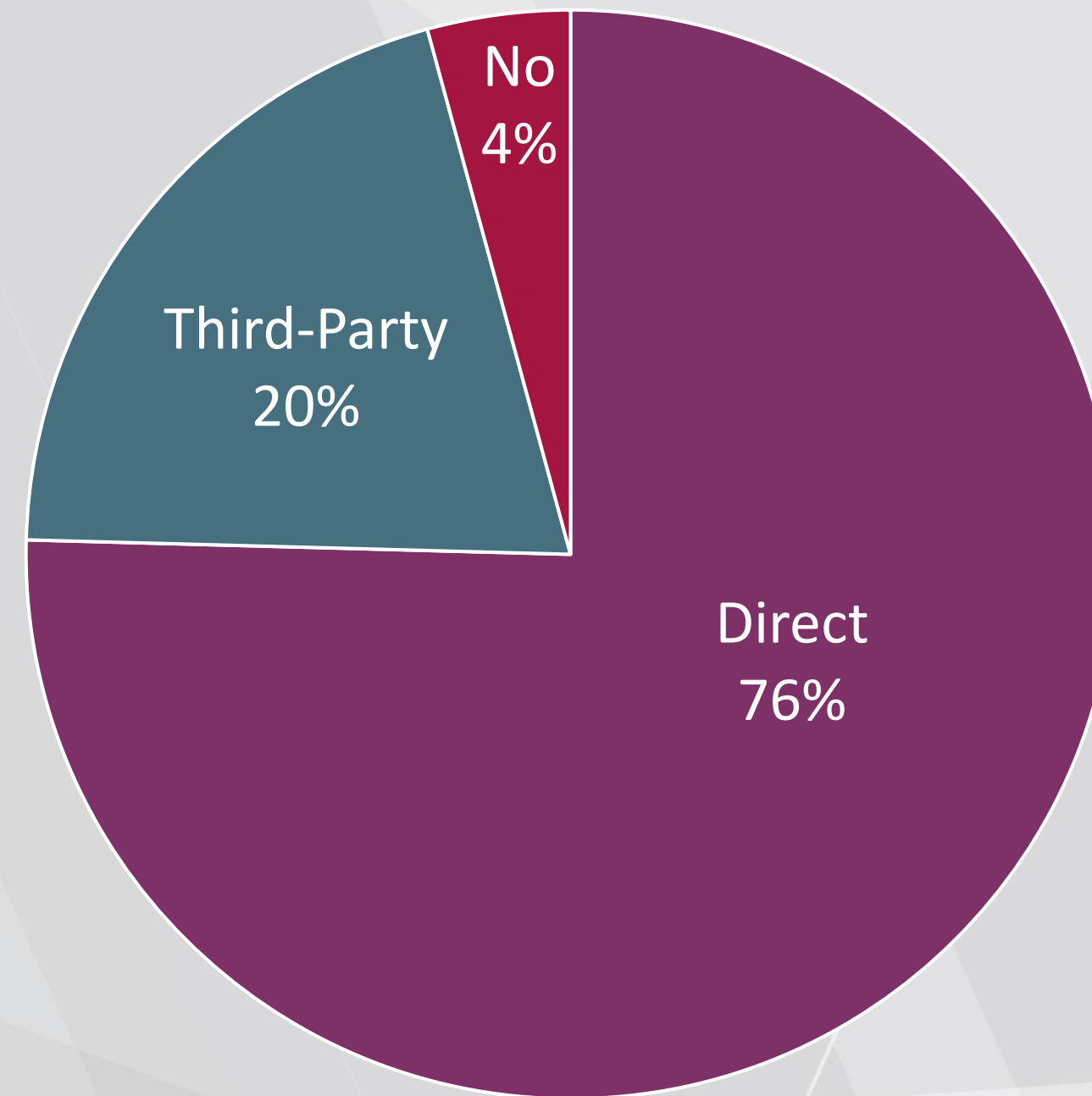
HOTELS

CURRENT HOTEL CHALLENGES



Base: All Operators

HOTEL BOOKINGS: WASHINGTON, DC



“Does your company organize any of the overnight accommodations for group travel into the Washington, DC metro area?”

Base: All Operators

ATTRACTIONS

CURRENT ATTRACTION CHALLENGES

Difficulty in obtaining group tickets



Inconsistent group policies



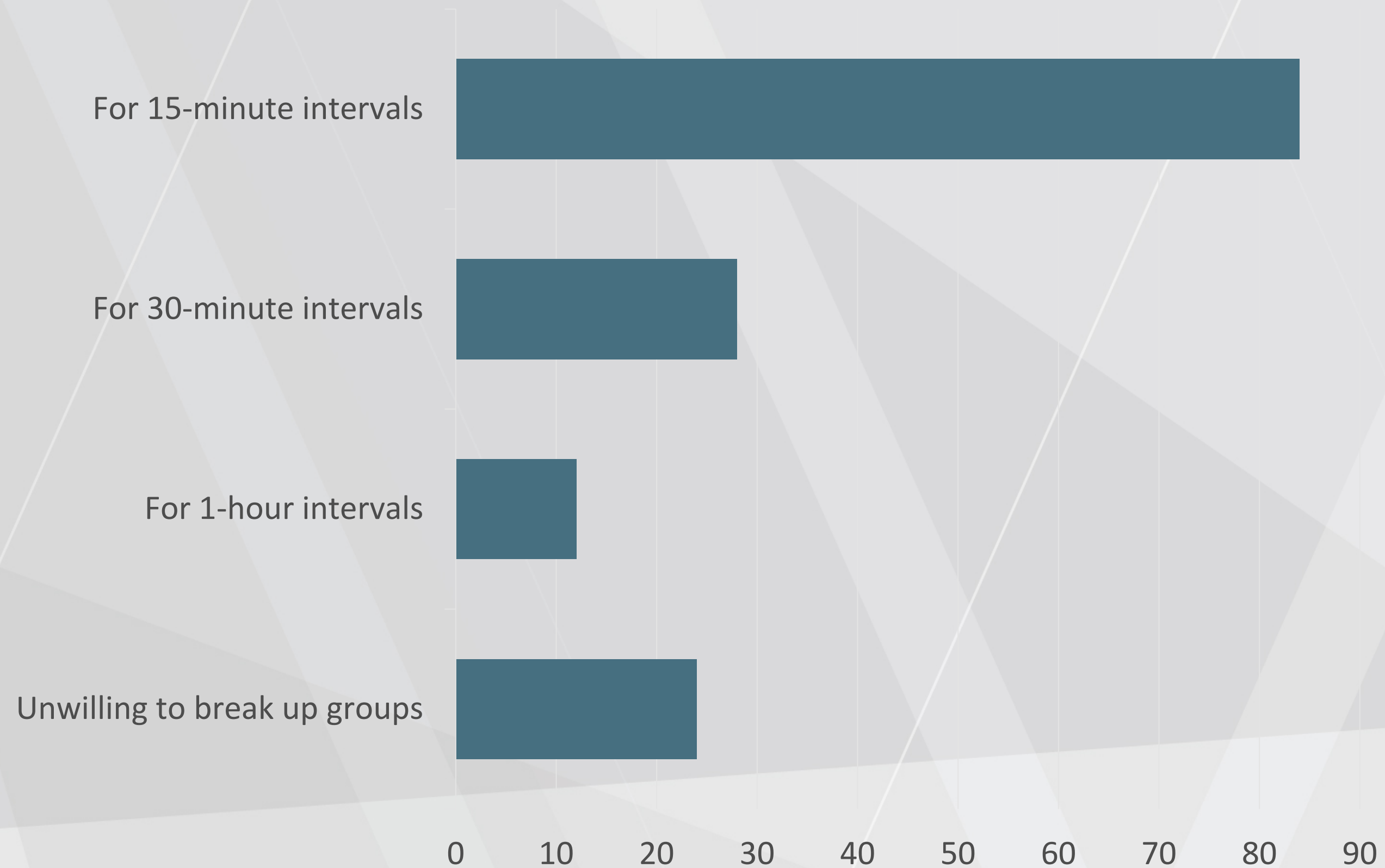
Inconsistent COVID-19 policies



0 10 20 30 40 50 60 70 80

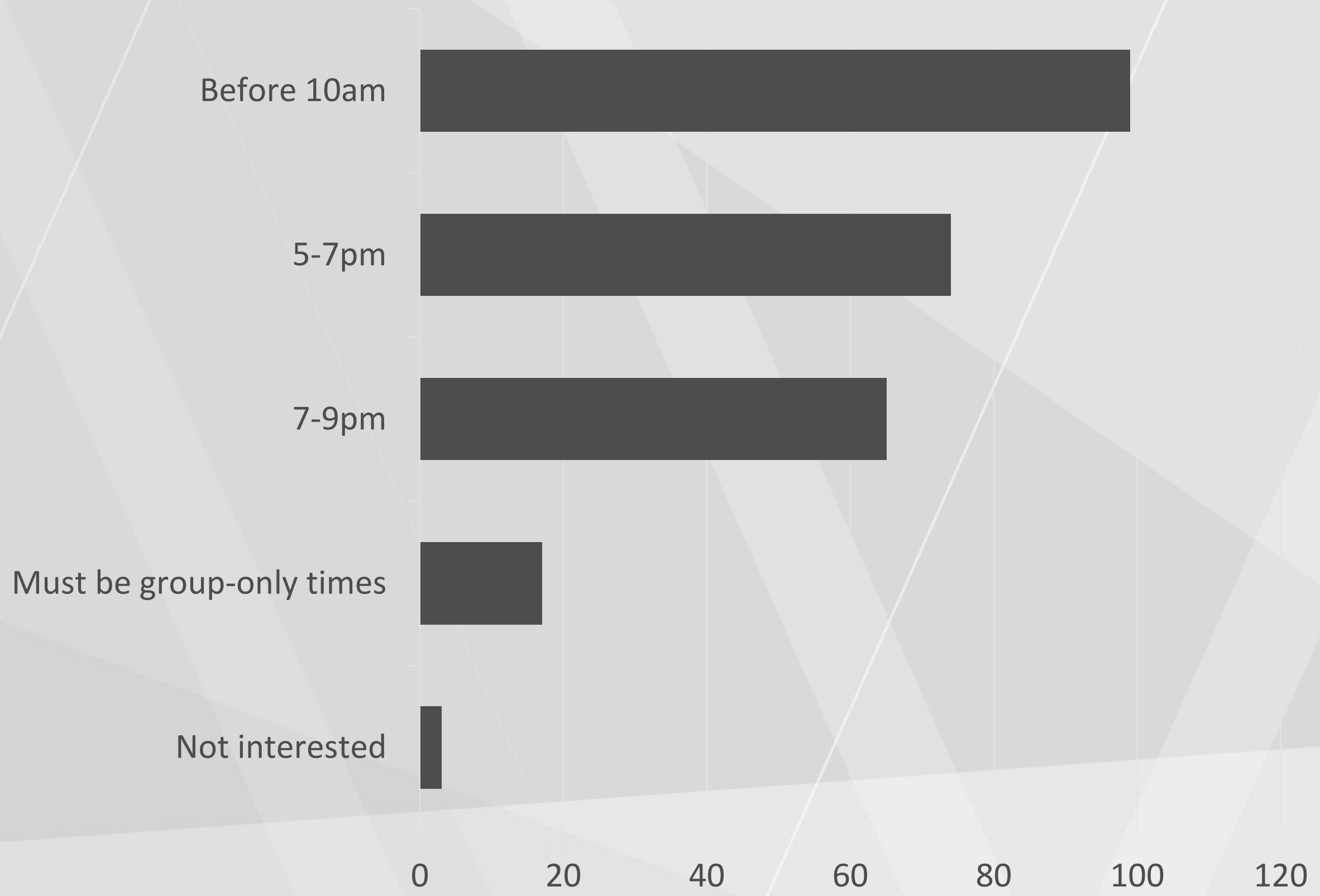
Base: All Operators

ATTRACTIONS: WILLINGNESS TO BREAK UP A GROUP



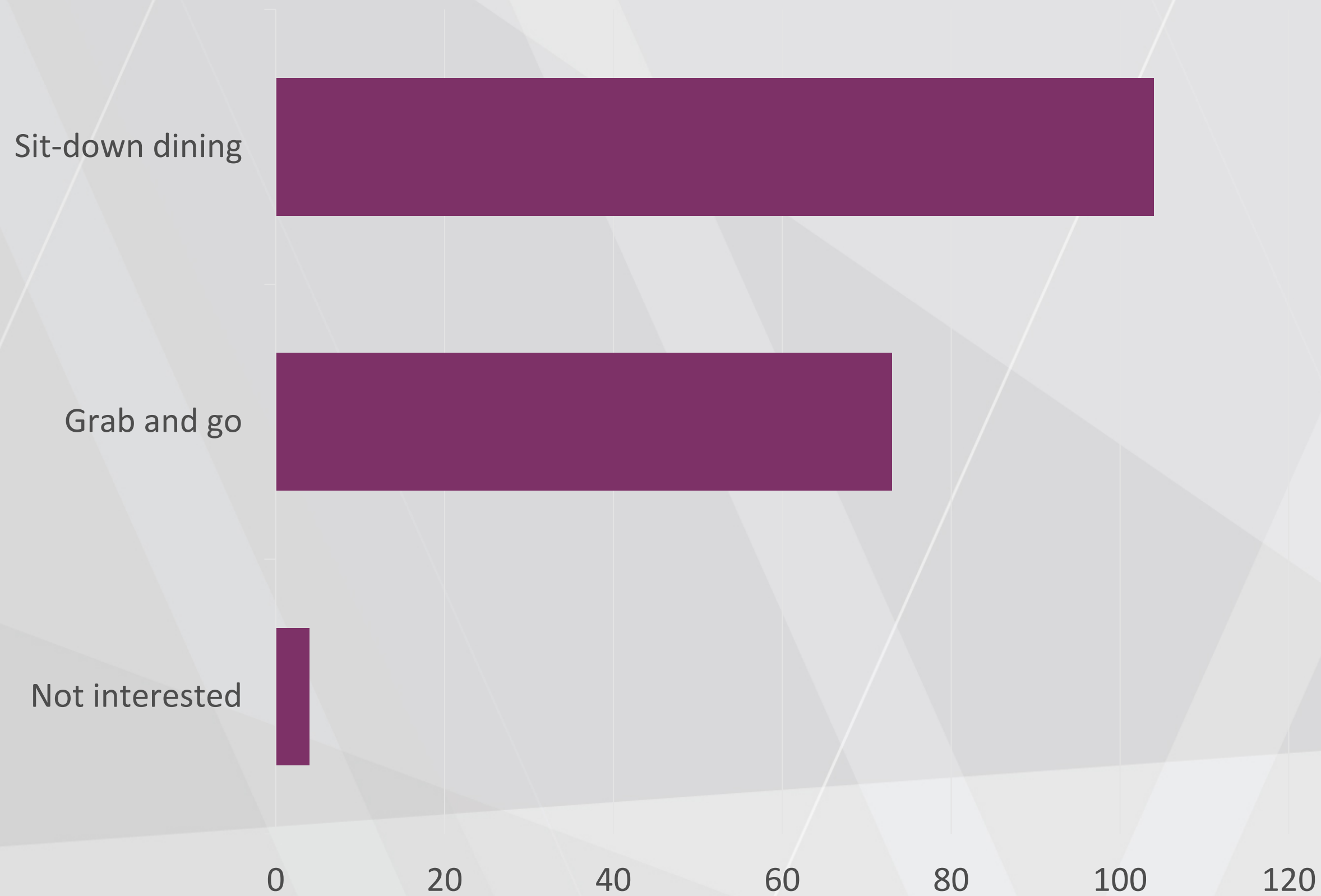
Base: All Operators

ATTRACTIONS: INTEREST IN MORNING/EVENING HOURS



Base: All Operators

ATTRACTIONS: INTEREST IN DINING SPACE

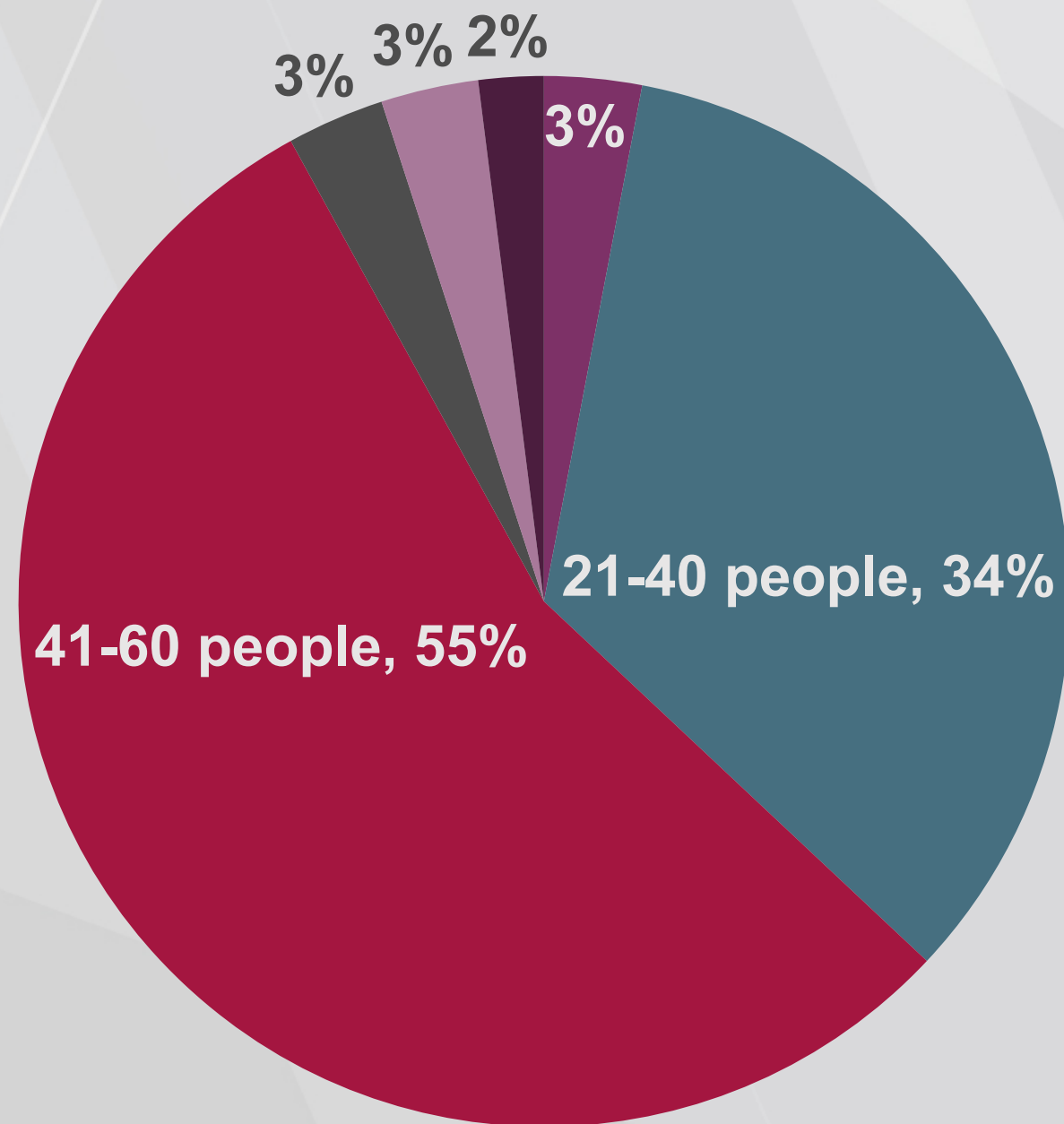


Base: All Operators

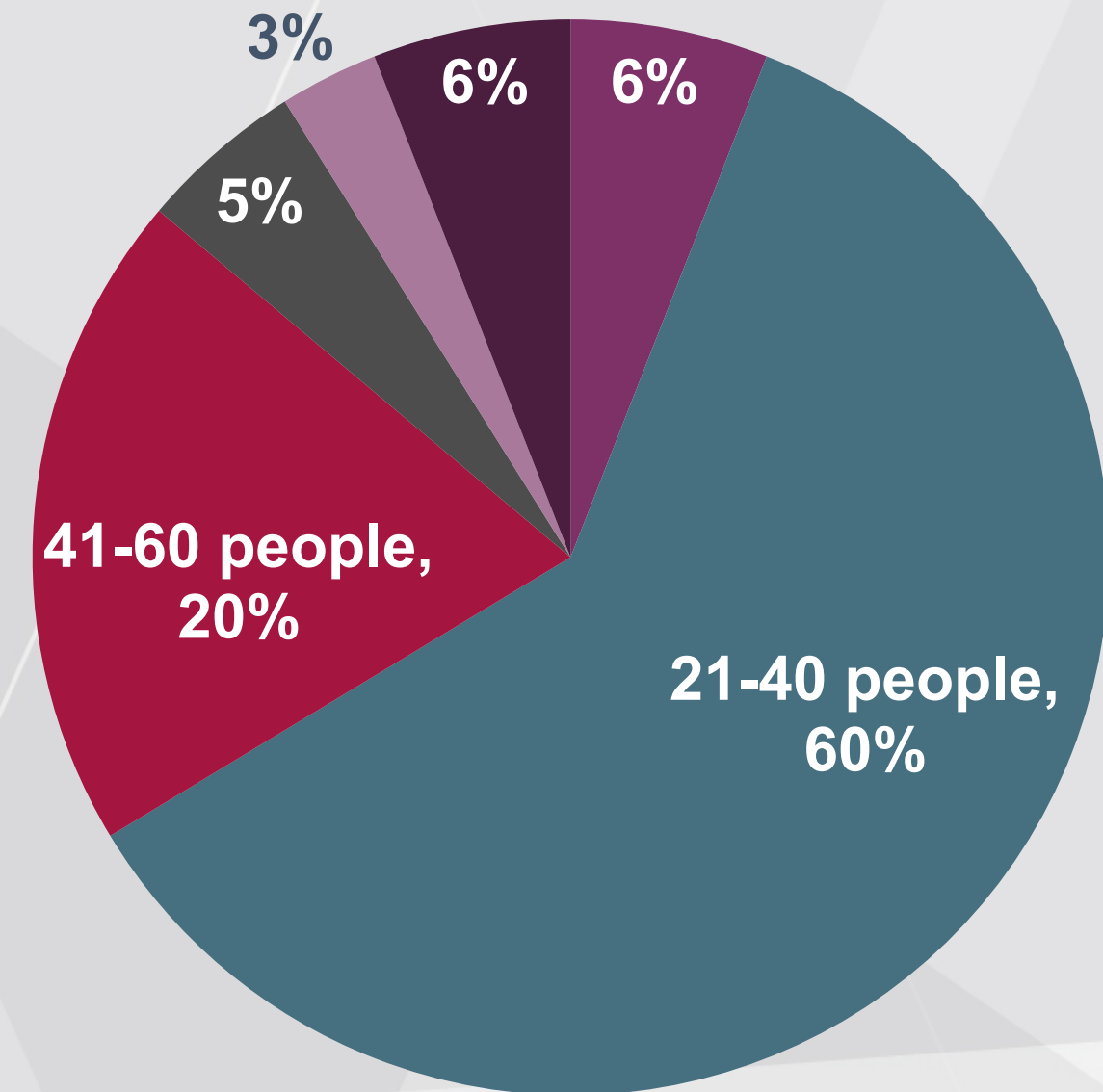
BOOMERS VS. STUDENTS

AVERAGE GROUP SIZE: BOOMERS

Boomers Pre-Pandemic



Boomers Expected 2021-2022



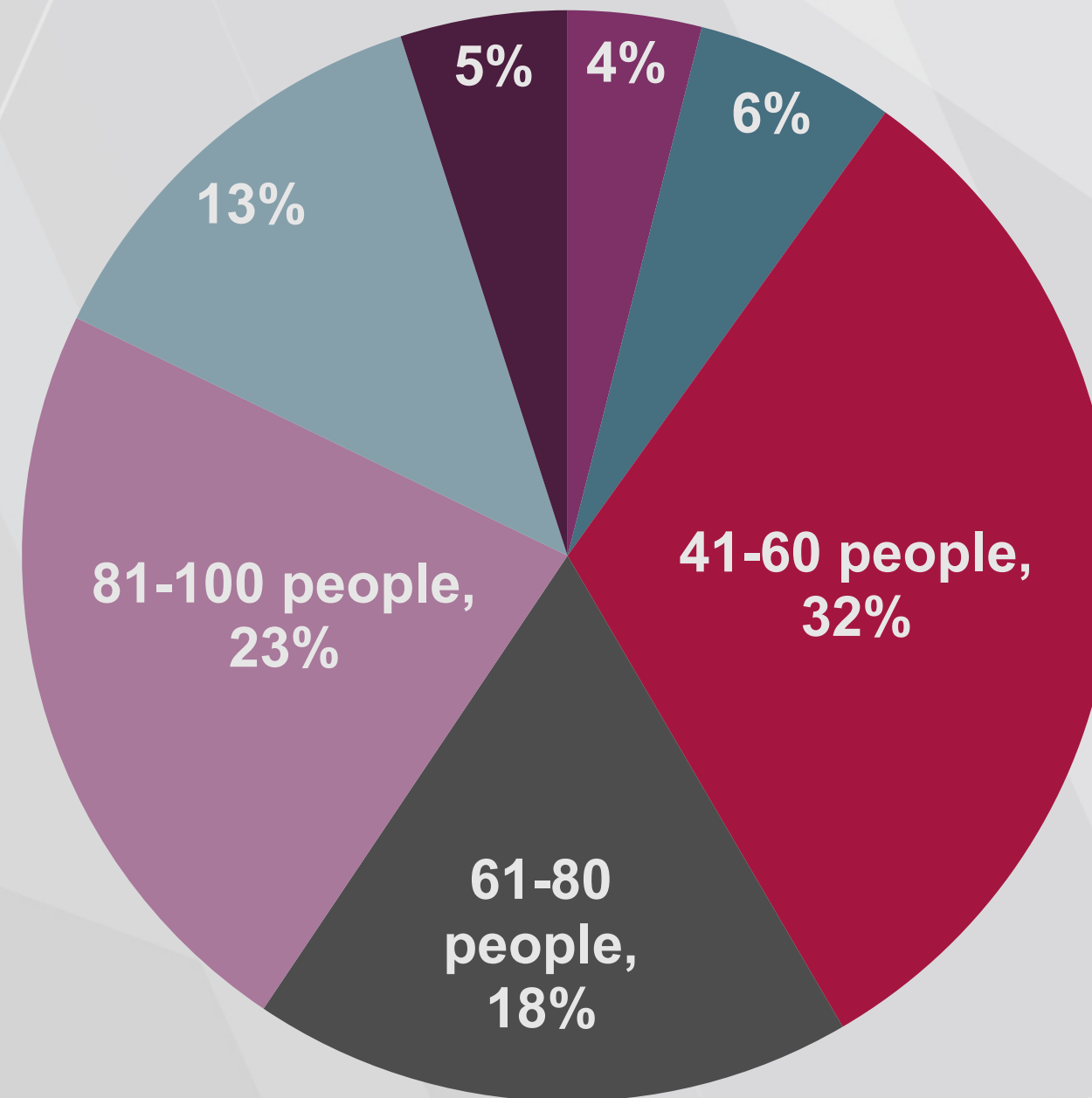
Operators expect boomer groups will be somewhat smaller for 2021-2022 than pre-pandemic, but still nearly all with 60 or fewer people



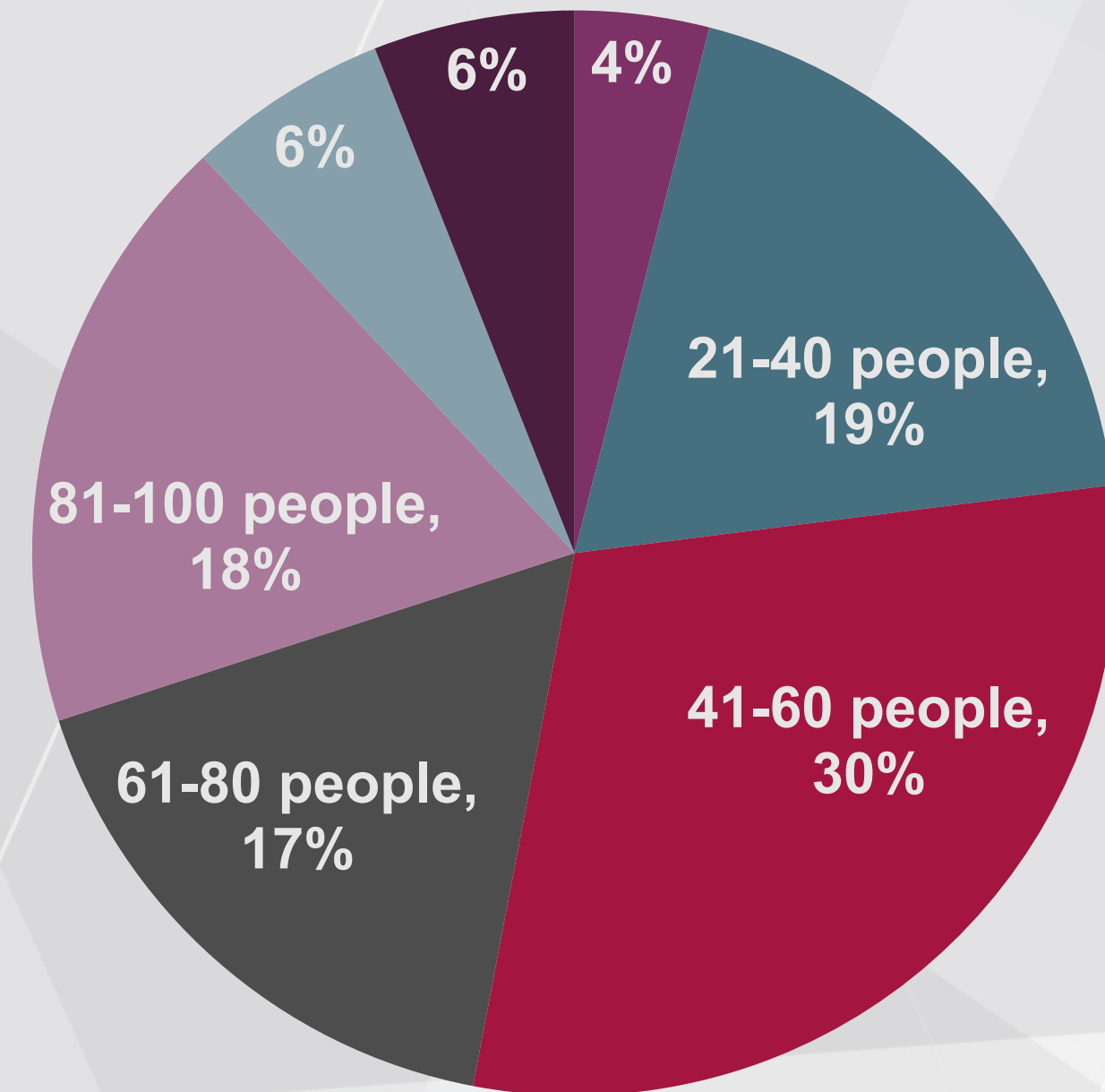
Base: Operators who run Boomer Tours to DC (69); Student Tours: (113)

AVERAGE GROUP SIZE: STUDENTS

Students Pre-Pandemic



Students Expected 2021-2022

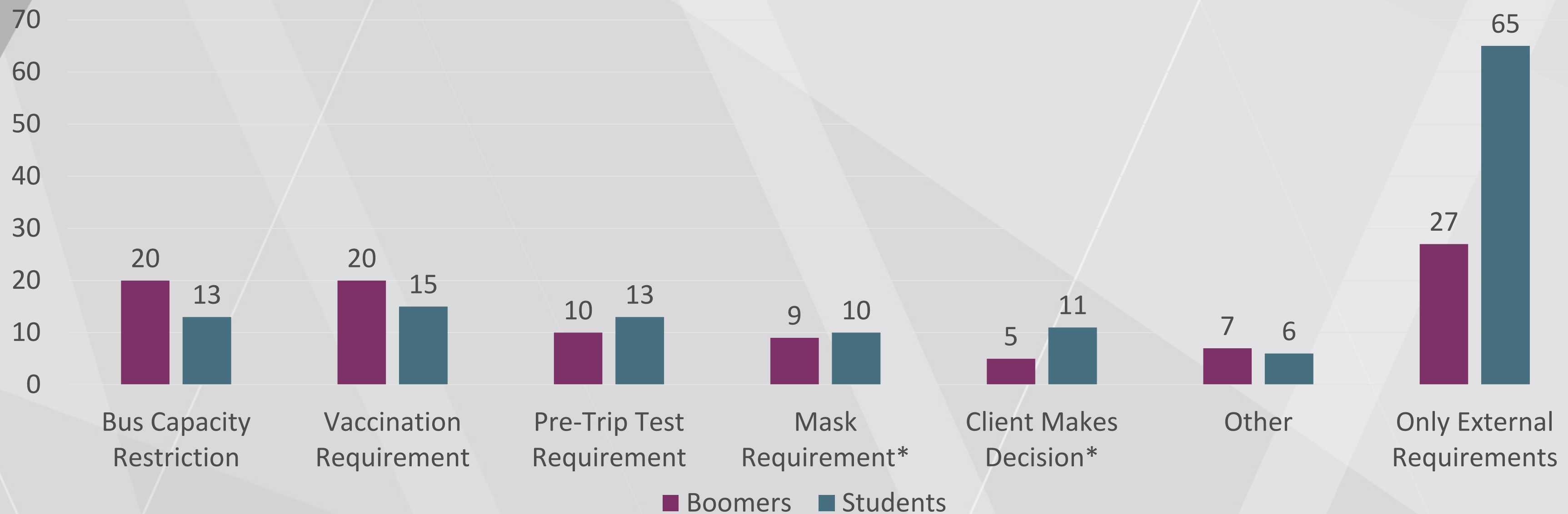


Operators expect **student** groups will be significantly somewhat smaller for 2021-2022 than pre-pandemic, with the drop of groups of 100+ students from 1/3 to 1/4.

■ 1-20 people ■ 21-40 people ■ 41-60 people ■ 61-80 people
■ 81-100 people ■ 101-150 people ■ More than 150 people

Base: Operators who run Boomer Tours to DC (69); Student Tours: (113)

OPERATOR COVID-19 REQUIREMENTS: BOOMERS VS. STUDENTS



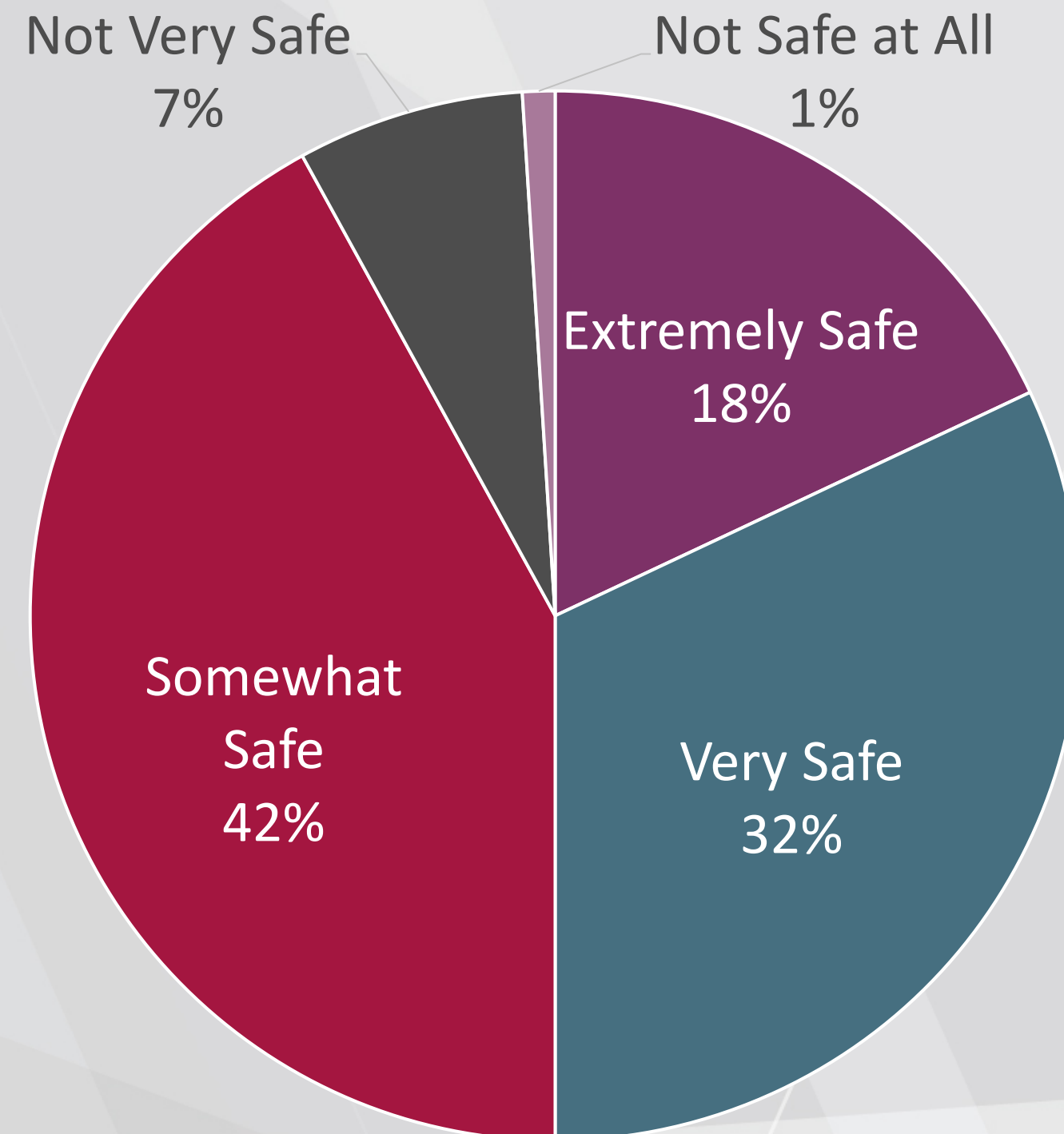
“Are you implementing any of the following COVID-19 protocols for group travelers on your tours? Please select all that apply.”

*Unaided responses; “External Requirements” include government & venue requirements

Base: Operators who run Boomer Tours to DC (69); Student Tours: (113)

SAFETY IN WASHINGTON, DC

SAFETY PERCEPTIONS OF WASHINGTON, DC: BOOMERS

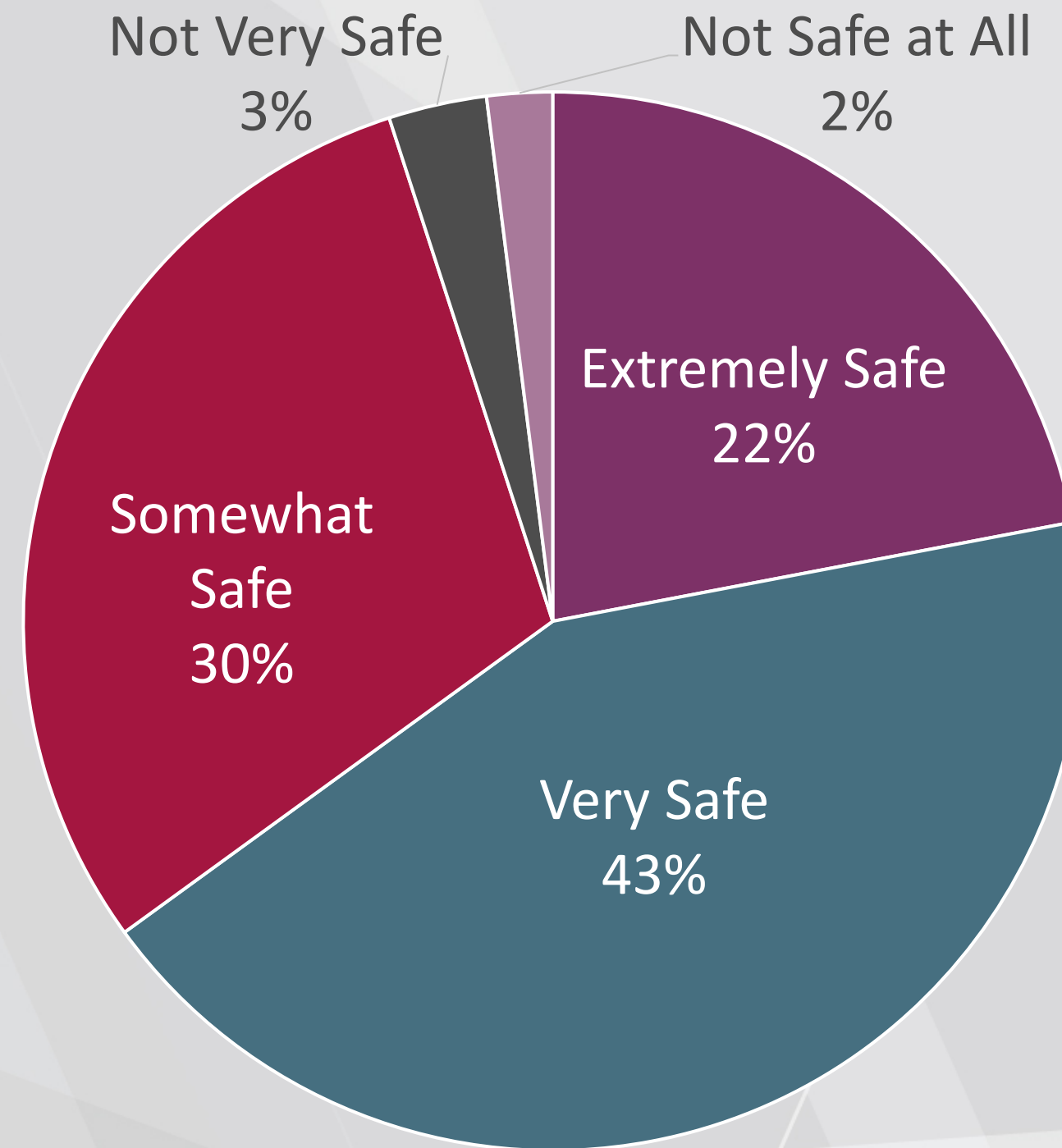


Respondents considered
“safety” to include COVID,
politics and crime

“How safe do you feel bringing a boomer/senior group to the Washington, DC metro area?”

Base: Boomer Operators (76)

SAFETY PERCEPTIONS OF WASHINGTON, DC: STUDENTS



Respondents considered
“safety” to include COVID,
politics and crime

“How safe do you feel bringing a student group to the Washington, DC metro area?”

Base: Student Operators (102)

KEY TAKEAWAYS

- COVID-related policies & uncertainty require operators to create backup plans
- Operators expect tours to be smaller and shorter
- Tours to DC are expected to return in Spring & Summer 2022, but still below 2019 levels
- Nearly half of operators expect their next trip to DC to run in Spring 2022
- Top challenges in DC relate to attractions, dining and motorcoaches

THANK YOU!