
World Tourist Insight Report

How International Travelers Make Decisions To Travel Around The World

Key Players In Each Major Country That Sends International Tourists

Report Benefits:

- Successfully invite international travelers to your country, city or destination.
- Know the key players like travel agents, media, tourist bureaus that shape the traveler's decision making
- Know the facts, data and statistics about International Travelers. Make informed marketing decisions.
- Create the most effective marketing strategy to reach the travel marketing top countries.

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Australia Trade & Business

Overview

The trade structure in Australia is made up of Travel agents, Wholesalers and tour operators and GSA's (General sales agents).

Tour Operators

Commission levels for wholesalers, who generally will only sell to the agency community and tour operators; tend to be a minimum of 15%, more likely 20%-25%, sometimes more.

Most wholesalers and tour operators tend to be based in Sydney, although some have headquarters in Melbourne, Brisbane and a few in Perth mainly catering for the local market. Most of the larger airlines (Qantas, BA) operate their own in-house leisure wholesale and retail programme. Others sub-contract to independent operators (Cathay Pacific - Creative Holidays, Malaysia Airlines - Spree Holidays).

Tour operators generally close off their brochure contracting by September at the latest and print/distribute in October/November.

Travel Agencies

There are approximately 4,000 agencies in Australia and many are members of Australian Federation of Travel Agents. The majorities are either franchises of or wholly owned by the major chains (Flight Centre, American Express, Jetset, Travelworld, STA and Qantas). The remainders are either privately owned or belong to a travel agent collective benefiting from membership deals and override commissions (Harvey World Travel, TravelScene).

The trend is for the smaller, privately owned agencies either to become franchises of the major chains, or to be bought by the chains as wholly owned agencies. Many retail chains have a system of preferred suppliers whose products have priority in their agencies. They also take on products sold exclusively through their chain; though being sold by one chain may exclude a product from another. Agencies are highly computerised with almost 100% access to CRS systems.

Marketing Representation: is available in Australia from a number of companies, who will agree a budget and marketing plan beforehand.

Market Entry Strategies

One of the best ways to target the trade is to make contact with the various wholesale product managers face to face.

Top Tips

Remember that you will need a visa to enter Australia. Since February 2000, business travellers to Australia have been able to obtain their electronic business visitor visa free of any Australian Government charges. The single entry short stay business visitor Electronic Travel Authority is available through airlines and travel agents around the world that are linked to the system. As of 1st July 2000, visas have been available from Australian missions overseas.

Tour operators generally close off their brochures in September/October and any plans to be included should be completed beforehand. Some of the larger tour operators tend to contract product from their head office instead of on-territory in Australia. If this is the purpose for your visit, April to August is the best time. For promotional activity, January to April is a good time to visit. Note that Australia closes down for Christmas, as it is the main summer holiday and school holiday. You will have limited success in making appointments with either the trade or press between December 14 and January 14.

Remember that the seasons in the Southern Hemisphere are reversed. Business is generally conducted in a relaxed but formal manner. Business suits are the norm even in summer and meetings are by appointment. Australians are generally punctual and will become irritated if they think their time is being wasted.

E-mail is the standard method of business communication in Australia. It is essential that your e-mail address is featured on your business card and all company stationery. It is common practice to also feature your mobile number on your business card. Business hours are generally from 0830-0900 to 1700-1730 Monday-Friday. Check to see that your visit doesn't fall on a public holiday or the school summer holiday around Christmas.

Travel between major cities take more time than one thinks and is generally by air. Travel by train, coach and car is limited to shorter distances. There are a number of different time zones, even half an hour in some cases, with a three-hour difference between Sydney and Perth. Finally, ensure that you make an appointment early in your visit to meet with the VisitBritain manager or marketing manager in Sydney. Let them know your progress and follow up, particularly after you arrive back in Britain.

Argentina Trade & Business

Overview

There are over 100 tour operators (mayoristas) and 2,900 retail travel agencies (minoristas) in Argentina. Of this number, 1,250 are located in the city of Buenos Aires and Greater Buenos Aires. Most of the remainder are located in the major cities of Cordoba, Rosario and Mendoza.

Tour Operators

The top tour operators in Argentina are: Cienitours, Furlong-Fox, Grupo TTS Viajes, Handling and Services Representaciones and Swan Supertravel. They are all located in Buenos Aires. Their main planning cycle is September – November ready for the following spring

Travel Agents

Anecdotal evidence suggests that travel agents are still important in making travel decisions. Recent research shows that 63% of international travellers used a travel agent to help them arrange their most recent leisure trip. One trend worth noting is the much lower usage of travel agents by those within the 25-34 age range. In this bracket, only 49% used an agent. This significant number among Argentina's youth segment could have a dramatic influence on the travel industry as the Internet and other sources become the preferred holiday booking method.

Market Entry Strategies

When in Argentina, brochures and information in Spanish are always preferred, although nearly all travellers will speak good English. If you wish to visit the trade independently, please see our following tips –

Sales Calls – Top Tips

- Before your visit get the the latest information on Argentina
- Avoid travelling during the months of December-February – these are the main summer holidays and many executives will be away for extended periods. July should also be avoided, as this is the main winter holiday month.
- In spite of an easy-going and relaxed lifestyle, business meetings are quite formal. Be sure to dress accordingly.
- Typical office hours are 0930-1300 and 1400-1830. Lunch can often be an extended affair lasting over two hours. Dinner is rarely taken before 2100 at the earliest.

- It is always useful to learn some Spanish phrases. A little effort will impress your client and give you an advantage in business negotiations.
- Avoid taking a taxi from Ezeiza, the international airport in Buenos Aires, as they can be very expensive and are often unregulated. Arrange a private car at the airport. Private car companies are more dependable and charge around \$50 or US\$18 for the journey between the international airport and the centre of the city.
- Be aware that you will be charged a departure tax, if it is not included in the airfare, when leaving Argentina.
- Remember national/bank holidays are unlike those in Britain. In Argentina, do not expect any offices to be open on these days though you may find that shops are open.

Public Holidays

January 1	May 25
April 2	June 19
April 13-14	July 9
April 16	August 21
May 1	

Brazil Trade & Business

Overview

The travel trade in Brazil still plays a very important role in the consumers' choice of travel destination. However, the trade still lacks knowledge of all but the basic product.

Travel trends continue to move away from package tours toward independent travel, with only 45% of international travellers using a travel agency to organise their trips. Over 56% of all trips are part of an escorted tour with 40% being FIT. There is also a fiercely competitive specialised student and educational travel trade sector.

Tour Operators

The top tour operators in Brazil are ADV Viagens e Turismo, CVC, Queensberry Viagens e Turismo, Soft Travel, New Age and Flot Operadora. The majority of operators are located in Sao Paulo or Rio de Janeiro the main planning cycle is September – November ready for the following spring.

Travel Agents

Brazil has approximately 6,300 travel agencies with international sales, although only about 65 have sales above US\$1 million. Increased operating costs are forcing smaller agencies to close or merge with larger, better-equipped agencies and operators. This should see a move towards a stronger travel trade structure in the future. The main CRS systems in use are Amadeus, Galileo and Sabre. Reaching the Brazilian Trade

When in Brazil, brochures and information in Portuguese is extremely helpful and the local trade appreciates this. One of the best ways to target the trade is to make contact with them face to face. If you wish to visit the trade independently, please see our following tips for making sales calls:

Market Entry Strategies

- Before your visit get the latest information on Brazil
- Check the timing of your visit. Avoid the holiday periods of December/January/February and July. Carnival and Easter are also bad times. Long weekends are common for top management when holidays fall on a Tuesday or Thursday.
- Make appointments with the agents you intend to visit a couple of weeks before you travel. A faxed confirmation two days before the meeting is a good idea. Also try and mail a copy of your brochure to them so they are able to learn about your product prior to your visit.

- Leave plenty of time between appointments, particularly in São Paulo. Traffic congestion is not unusual and travelling within the city is slow. Taxis are safe and meters currently show the fare to be paid. Buses should be avoided, but the underground system is clean and efficient.
- Speaking Portuguese will help immeasurably, instantly making your visit memorable. Print information, or at least flyers, in Portuguese. This should increase the probability of success over rival companies who have not made the effort to do so.
- Make presentations clear and concise; attention spans are short.
- Working hours tend to be 0900-1200 and 1400-1800, Monday to Friday. Some agencies are also open Saturday morning, but management might not necessarily be available.
- Lunch and dinner appointments are treated as social events, not just extensions of a business meeting.
- Success in the market depends greatly on building up personal relationships. Follow up after your visit to renew contact. Remember some personal details and ask after your contact’s spouse or children. Patience and flexibility will pay off in the end.

Public Holidays

January 1	April 21
February 25 (Carnival 4 days)	May 1
March 1	June 15
April 14	September 7
April 16	

Canada Trade & Business

Overview

Product distribution to the customer has traditionally been through retail travel agencies.

The rising importance and sophistication of travel Internet sites together with global uncertainty have led more Canadians to take a "wait and see" attitude before committing to taking a trip. This trend has forced fundamental changes in how travel is marketed, promoted and sold.

Travel e-commerce has grown rapidly with the entry of new web-based companies and traditional agencies offering a web site booking facility. Airlines and tour operators are placing more emphasis on direct sell. The number of holiday travellers using a traditional travel agent has fallen to 51% in 2004 from 64% in 2002 (CTRI)

While more Canadians are buying their travel on-line, this has not replaced the need for the storefront travel agent. What Internet travel sites have done is change the role of the travel agent. Internet travel websites perform a valuable service for Canadians looking for a flight, hotel and/or car rental for a domestic or US business or leisure trip. However, the same traveller will turn to a travel agent to help them with booking a package vacation or a group tour to Europe or Asia. The more complex and costly the trip, the more likely the traveller is to use a travel agent.

Agencies using a multi-channel approach seek to get customers to visit their website for product information and then either to book the trip directly on-line or to visit their nearest store front agent.

On-line retailers started out relying on selling air travel as their main source of revenue. However, they had to branch out to selling higher margin hotel, car rental, insurance and packages in order to churn out a profit. While on-line retailers are getting good at capturing customer information to sell more proactively, the storefront agent will continue to be relied upon for the higher margin, more complex trips.

Canada's major tour operators share more characteristics with tour operators in the UK than with US tour operators. British travel companies own two of Canada's major tour operators, Signature Vacations and MyTravel. Many of Canada's major tour operators are vertically integrated with their own fleet, tour operations and travel retailers. They are also national in scope.

In the past five years the number of IATA approved retail travel agencies has fallen by nearly 25% to 3,034 (IATA). The drop is a result of a consolidation in the retail travel industry, agencies going out of business and agencies being acquired or joining consortiums or becoming a franchisee. The independent retailers have become specialists

in group travel and other niche travel products. Off-line agencies are beginning to use the power of the Internet to develop personal relationships with their clients through e-communications.

Tour Operators

The majority of tour operators are based in and around the greater Toronto area with branch offices in other Canadian cities. The top twenty tour operators offer air seats and a choice of add-on land products such as gateway hotels, car hire, coach tours, fly-drive programmes, etc.

The planning/buying is completed in September through November and the brochure is printed and launched in January and February. Tour operators are moving content to their web-sites and investing in ebrochures, virtual touring, etc, while using print for image and branding purposes and reach through traditional travel agencies.

Coach tour operators such as Contiki Holidays, Globus, Cosmos, Insight Vacations and Trafalgar Tours have corporate offices in Toronto. There are hundreds of small tour operators, often part of a retail travel outlet, offering one-off group tours.

Travel Agents

There are 5,000 retail travel agency outlets throughout Canada. The number of IATA accredited agencies fell from 4,011 in August 1999 to 3,179 in August 2004 as a result of agency consolidation, bankruptcies and changing business practices. The popularity of carrier Web based booking systems has also reduced the demand for BSP accredited agencies. Air Canada reports that half of its domestic bookings are now made through its Website.

The number of holiday travellers using a traditional travel agent has fallen to 51% in 2004 from 64% in 2002 (CTRI). While more Canadians are buying their travel on-line, this has not replaced the need for the storefront travel agent. What Internet travel sites have done is change the role of the travel agent. Internet travel websites perform a valuable service for Canadians looking for a flight, hotel and/or car rental for a domestic or US business or leisure trip. However, the same traveller will turn to a travel agent to help them with booking a package vacation or a group tour to Europe or Asia. The more complex and costlier the trip, the more likely is the traveller to use a travel agent.

Retail Agents: For lists of retail agents you can purchase the following publications:

- Baxter - Personnel Guide
- Travel Week – The Blue Book

There are 4,855 retail travel agency outlets throughout Canada. The popularity of carrier Web based booking systems has also reduced the demand for accredited agencies. Air Canada reports that half of its domestic bookings are now made through its Website.

The major national retail chains, with Toronto head offices, are Advantage Travel, T-Comm, American Express, CAA Travel, Carlson- Wagonlit, Giants, Goliger’s, MyTravel, Thomas Cook, Sears, Uniglobe and Vacation.com. They tend to have preferred agreements to enhance their commissions and profitability.

Market Entry Strategies

One of the best ways to target the trade is to make contact with them face to face via sales calls.

Top Tips

- Canadians tend to use British and not American spelling, therefore your literature and correspondence should reflect this.
- Office hours in Canada are generally the standard 9 -5.
- Make appointments in advance with all the people you wish to meet.
- Dress code tends to vary with the season in Canadian offices. Normally during the winter period business attire is worn and in the summer months business casual wear (polo shirts) is worn.
- English is spoken all over Canada. Quebec is the exception, although most in the travel industry will speak English as well as French. Montreal is a bilingual city.
- Follow-up is very important. Canadians like prompt answers to questions, whether by telephone, letter, fax or e-mail.
- The Canadian climate varies enormously. There are four distinct seasons. British Columbia has a moderate climate similar to Britain. The rest of Canada has more extreme seasonal differences. Temperatures range from bitterly cold winters and lots of snow to hot and humid summers. If you do visit in the winter, do not be surprised by temperatures of -35°C.
- Avoid the holiday periods for your visit – most Canadian public holidays are different to American ones.

Distances: Distances in Canada are measured in kilometres. Canada is over 7,000 kilometres from east to west. You would need seven days to drive from Halifax, Nova Scotia, to Vancouver, British Columbia. By airplane, the same trip would take about seven hours. The distance from Toronto to Montreal is 546km – recommend flying. The Greater Toronto Area covers a huge geographic area and there is lot of traffic congestion – getting from one side of Toronto to the other during rush hour can take several hours.

Commitment to the market: You must be prepared to take a long term view and persevere in the market for at least 2-3 years, and modify your product to meet Canadian needs where necessary. Keep the visits going and back these up with e-communications and a web presence in the marketplace. Send messages and New Year cards.

Reaching the Press: Due to Canada’s vast area, newspapers tend to be more provincially based, with all major cities having at least one daily paper. The Globe & Mail and the

National Post are national papers published in Toronto Community and ethnic newspapers are also very prevalent in most cities and towns.

Four papers dominate the trade scene and are nationally distributed – Canadian Travel Press, Travel Courier, Canadian Traveller and Travel week. In addition, openjaw.com, a travel trade web site, has revolutionised the delivery of industry news, product, pricing, etc. to the travel agents’ desktop.

Mexico Trade & Business

Overview

Travel Agents and Operators are found predominantly across major Mexican cities, namely Mexico City, Guadalajara and Monterrey. Those firms specialising or with a greater interest can be found in Mexico City.

Tour Operators

There are around 50 major operators within Mexico of whom the following offer best potential:

- Viajes Fama
- Las Estrellas
- viajes Capistrano
- viajes excelsior
- viajes intermex
- asatej
- texmar

Travel Agents

Consumer use of travel agents is low in comparison to other Latin American countries. The majority will use their agent to purchase airline tickets, or to book hotel accommodation. Travel agents are used sparingly with reference to choice of destination or planning of itineraries.

The association of Mexican Travel Agents currently lists around 785 member companies, although there are approx 2000 travel agents operating in country, with 60% based in Mexico City.

United States Trade & Business

Overview

The trade structure in the US is dominated by agents and operators and is split as below:

Tour Operator:	Retail Travel Agent:
Coach Tour	Consortia
FIT	Independent
Non-Profit	Online Agency
Special Interest	

Intelligence from travel partners suggests that the traditional coach tour groups continue to decline and FIT trips and product is gaining market share.

Despite the spate of doom concerning the future of the travel agency as the interface between client and supplier, this distribution mechanism is likely to remain the dominant force in the dissemination and sale of international travel.

Tour Operators

There are 550 qualified tour operator companies with product, ranging from small to large size. Many larger companies belong to an association, either USTOA (United States Tour Operators Association) or NTA (National Tour Association). Many operators are also preferred suppliers of retail consortia, e.g. Vacation.Com, Virtuoso, Ensemble Travel (new name for GIANTS).

The planning cycle for operators depends on the size of the company and business focus. Many do have main season and off-season product, so will engage in the buying process with suppliers in spring for the following year.

Tour operators can get over 50% of sales from retail agents, especially on group business. Large operators employ sales reps throughout the USA to target agents and group organisers, paying higher commissions to large agency chains like American Express.

Operators will tend to approach ground handlers for complex planning (non-profit) and some will end up working with a number of ground handlers depending on service and speciality they provide.

Tour Operators are a good sector to target to try in order to try and get them to include your destination or product in their programs. Whilst there are over 500 tour operators in the market there are ways to focus your work. The 2 major organisations VisitBritain works with are USTOA and NTA. Both of these organisations have annual conventions, which are often a mixture of networking sessions, seminars, social activities and often a trade show.

NTA : NTA is made up of nearly 4,000 members with 660 tour operator members and brings together those who package travel - group as well as individual trips - with suppliers and destinations who represent the various components of a trip. Although NTA is based in North America, their membership spans the globe.

NTA is a great organisation for the smaller tour operator. It does have some challenges in the respect of several tour operators who belong to NTA do not sell international travel as yet. However, their annual convention provides you with the platform you need to meet and chat with people who have a genuine interest in your product. NTA operators want to learn, they are very enthusiastic and this provides you with a great opportunity to build relationships. Further information: www.ntaonline.com

USTOA : USTOA tends to have the larger tour operators as members and there are 750 members in total. The USTOA Annual Conference is open to all organisations and companies that are Associate or Allied Members of USTOA. USTOA comprises of the largest and most influential tour operators in the USA and according to a recent survey; USTOA companies move more than 10 million passengers annually and account for an annual sales volume of more than \$8 billion. Further information: www.ustoa.com

Travel Agents

American travellers' reliance on travel agents in planning and booking vacations has lessened dramatically, largely as a result of the Internet.

The main association for travel agents in the USA is ASTA (American Society of Travel Agents). As of July 2004, there were 23,213 accredited travel agency locations in the US, according to ASTA. For more information see www.astanet.com.

While the air carriers have squeezed commission levels to cut costs, other types of supplier continue to refine and cultivate their agency-based distribution channels. All types of travel supplier reward exceptional performance with deepened commission levels. It is therefore advisable to work with agents if you have a product to sell that is commissionable. Agents are selling in tough times and are looking to sell products that they get commission on.

In response to this much more competitive environment, travel agencies have tended to consolidate, with smaller agencies giving up their independence in order to merge with larger operations (e.g. Vacation.com, Virtuoso, Ensemble, etc) to save on overheads and administration they are no longer able to afford. Increasingly more retail travel agents are joining consortia for the benefits and support services they offer. All agents are pre-qualified by the consortia prior to membership, because they deliver good international business and revenue.

Vacation.com: Vacation.com is the largest network of travel agencies in North America with over 8,000 member locations across the United States and Canada. They are the

product of the acquisition and consolidation in 1998 of ten leading travel agency marketing organizations (GEM, GEM Canada, Cruiselink, SPACE, ACTION 6, TIME, Consolidated Travel Services, Crown Travel Group, The Consortium, and AURA). Membership of this organisation offers great access to these agents and their annual convention offers fantastic networking opportunities.

Further information: www.joinvacation.com

Virtuoso: Virtuoso is an exclusive network of more than 6,000 elite travel specialists in North and South America. A privately owned company, Virtuoso provides marketing, sales, technology support, and exclusive services and products to leading independent luxury travel agencies. Comprising of 285 independent travel agencies, as well as a combined consumer database of approximately 1 million affluent leisure travellers, Virtuoso members generate \$3 billion annually in travel sales, making the group the most powerful in the luxury travel segment.

Virtuoso's regular member surveys give insight into the lifestyles of the world's wealthiest travellers:–

- Hottest travel trend younger (34-52 years) = 24% active / adventure.
- Hottest travel trend older (53+) = 44% luxury cruises.
- Escorted group travel is declining in popularity regardless of age.
- When preparing for a vacation, Neiman Marcus is the most popular retailer for pre-trip shopping (24%).
- Outdoor/nature components are an increasing trend.
- For 8%, Gordon Ramsey, Claridges was the hottest international restaurant in 2003.
- Wimbledon was the international event best attended by affluent travellers in 2003 (39%).
- 66% of clients use Internet to access travel info and 61% communicate with Virtuoso via email.
- Sources of influence with biggest impact on clients' travel choices: 55% recommendation; 19% travel mags; 8% lifestyle/culinary mags with travel sections.
- Paris is the most popular foreign destination for shopping (32%) – 10% for London.

Further information: www.virtuoso.com

Affinity Travel: Many Americans are members of an alumni association, museum, gallery or other "non-profit" membership organisation. The actual size of the market is estimated at 2.4 million travellers – those who have taken trips with their member organisation. However, the potential size of market is estimated to be 4.5 million travellers – these being alumni members who have expressed an interest in travelling internationally. Sales volume of this market is estimated at \$660million. A key ingredient of a non-profit tour is the educational experience typically embracing heritage and culture and self-enhancement.

In the US, Non Profit Organisations (NPO) such as art galleries, museums and alumni associations provide travel programs for their members/ 'friends' and donors. These 'affinity' programs have a strong educational focus relating to special interest areas of art, history, architecture, gardening, walking, theatre or music. The tour participants are generally people in their fifties and over. They are leisure travellers who are seeking new experiences, learning with like-minded people and personal fulfilment through travel (experiential travel).

Specialist 'suppliers' (tour operators) work closely with the NPO to arrange most of the tours. There are about ten top suppliers in the US including: Alumni Holidays International (Oakbrook, IL) Gohagan Travel (Chicago, IL), InTrav (St. Louis, MO), Elderhostel (Boston, MA), Academic Arrangements Abroad (New York, NY) and IST Cultural Tours (New York, NY). These companies manage 80% of the market. Destinations are selected over one year in advance by the NPO's inhouse 'travel planner'. Most planners will simply purchase pre-packaged tours from suppliers and make slight alterations. A few will custom design a tour to suit more specific requirements of their members. Often feedback from previous travellers will help to determine the educational focus and destination.

Representatives: This is an effective method, but normally the most costly means of selling your product overseas. It has several advantages:

- Your product is instantly bookable through the retail trade, who has a toll free number they can use.
- The representative can distribute brochures & undertake marketing on your behalf.
- The representative has knowledge of the market so can offer advice on how the product should be packaged and sold.

Market Entry Strategies

One of the best ways to target the trade is to make contact with them face to face via sales calls.

Sales Calls – Top Tips

- When making appointments it is best to avoid Monday mornings and Friday afternoons. Be sure to have a good supply of business cards and brochures with you.
- When visiting the USA (New York and San Francisco excepted), it is always important to remember that the structure of American cities is based wholly on the cult of the car and you therefore need to hire a car to make effective use of your time. Distances in southern California are especially great, and it is advisable not to pack too many appointments into one day – when planning allow plenty of time to get to the next appointment.

- In the larger travel agencies, expect to see many agents, not always on one visit. Many larger agencies employ independent contractors who have their own clients and sub-lease their office space. Always leave more than one brochure.
- When calling on wholesalers, quote net prices, sufficient to allow them a 20%-25% mark-up, as they will have to relinquish at least 10% to a travel agent.
- The best times of the year to call are between January and April for travel agents and between April and June for wholesalers, for inclusion in the following year's programme.
- The major national holidays are often seen in the US as a chance for far-flung families to get together and, if possible, extend the prescribed vacation period. When visiting, avoid 4th July, Thanksgiving (November), Christmas and Rosh Hashanah/Yom Kippur (September/October).

Planning a sales trip to the US?

As of June 26, 2005, the Department of Homeland Security (DHS) has announced that all persons from countries in the Visa Waiver Program (VWP) must present a machine-readable passport (MRP) to enter the United States without a visa. While this requirement has been in effect since October 26, 2004, DHS has allowed Customs and Border Protection (CBP) officers the discretion to grant a one-time exemption from the requirement to travelers who apply for entry under the program but who do not possess the required passport or B-1/B-2 visitor visa. The exemption has been effective for a single entry to the United States; VWP travelers who make an incidental trip to Canada, Mexico or an adjacent island as part of their trip may not be permitted to reenter the United States without an MRP or B-1/B-2 visitor visa, though exceptions are available to cruise ship travelers who will be making successive stops at U.S. ports during their trip. This limited exemption period ended on June 26, 2005. Starting on that date, transportation carriers will be fined \$3,300 per violation for transporting any Visa Waiver traveler to the U.S. who does not possess a machine-readable passport.

China Trade & Business

Overview

The Chinese government has a tight grip on its outbound market by controlling the destinations in which its citizens visit through the ADS policy on destination approval. The government also controls the amount of money that is spent on travelling.

As a national tourist organisation, the State Council regulates the China National Tourism Authority (CNTA). They are directly responsible for promoting the Chinese tourism industry. The Public Security Bureau (PBS) is in charge of monitoring and issuing Passports to Mainland Chinese nationals. Civil Aviation Authority of China (CAAC) supervises the distribution of airline tickets.

Travel retailers act as both tour operators and travel agencies for domestic, inbound and outbound travel. The roles between wholesalers and retailers in China are not clearly defined.

Before 2005, foreign owned travel agencies were allowed a controlling stake in joint ventures with the government. However, from 2005, agencies are allowed to be wholly owned by foreigners. These companies need to have a worldwide turnover of US\$40 million and will not be able to conduct outbound business travel.

The large Chinese outbound operators conduct the most Chinese outbound travel. For example, China International Travel Service (CITS), China Travel Service (CTS) and China Youth Travel Service (CYTS).

Chinese Wholesales / Large Agents : Commission Level: 15-20%

Wholesale travel agents began to emerge in China in 2003. A few authorised outbound international travel agents in Beijing, Shanghai and Guangzhou take bookings from other domestic travel agents, in particular those who operate outside of the traditional ADS regions, who are not large enough to form their own groups.

This is referred to as a “CAN (pronounced as “chanc”) TUAN or merge tours”. Although they do not operate in the traditional sense of a wholesaler, these agents are referred to as Wholesale-Retail agents.

Chinese Retail Agents : Commission Level: 5-10%

As there are no independent retail outlets, all operators must handle the full dynamics of the wholesaling and retailing role (acting as both tour operator and travel agency), including creating products, promoting the products and selling the products.

The Chinese travel trade is currently divided into two categories:
International travel agents and domestic travel agents:

- International travel agents can organise inbound travel and domestic travel. Selected agencies can also organise outbound travel.
- Domestic travel agents can only organise travel within China. There are 670 CNTA travel agents in China authorised to handle outbound travel arrangements under ADS.

The British Embassy have confirmed there will be no more than 50 Chinese outbound tour operators across the country authorised to sell ADS travel following their risk assessment process.

The table below is a list of the largest outbound agents.

Beijing	Shanghai	Guangdong
1. CTS Head Office *	1. Jin Jiang	1. GZL International Travel Service
2. China Comfort	2. Hua Ting	2. CTS Guangdong *
3. CYTS *	3. CITS Guangdong *	3. CITS Guangdong *
		4. Shantou Tourism General Co

* CITS: China International Travel Services

* CTS: China Travel Service

* CYTS: China Youth Travel Service

Representatives

Representatives can distribute brochures and undertake marketing on your behalf. They have knowledge of the market and can offer advice on how the product should be packaged and sold.

Market Entry Strategies

Sales Calls

The best time to visit is March to early April and mid October to early December.

It is recommended you visit the market with an interpreter/guide if you do not have strong Chinese language skills. The English language is less common than in other Asian markets. We recommend in the short term you concentrate your efforts on the three main centres for potential traffic, these being Beijing, Shanghai and Guangdong province.

Sales Calls – Top Tips

They will update you on the current market situation and the potential of your travel product within the local area.

When making appointments it is best to avoid Monday mornings and Friday afternoons.

Be sure to have a good supply of business cards and brochures with you. Use both hands to present and receive business cards with the writing always facing the recipient.

Never write on a business card or put it away without closely reading it and never put in your back pocket. Instead place it on the table in front of you and refer to it occasionally throughout the meeting.

It is recommended business cards are printed one side in English and the reverse in Chinese (simplified characters).

The Chinese trade require information (print / web) in the Chinese language (simplified version).

Bargaining is a way of life with the Chinese. Therefore even a small discount would make your business transaction run smoothly. Learn a few Chinese greetings. This would impress your Chinese clients: Hello - Ni Hao / Thank You - Xie Xie / Bye - Zai Jian.

Avoid Public Holidays.

http://www.excite.co.uk/travel/guides/east_asia/china/PublicHolidays

Hong Kong Trade & Business

Overview

There are over 1,400 tour operators and travel agencies in Hong Kong handling inbound and outbound travel. The majority of agents are based around the commercial districts of Hong Kong and Kowloon. Over 4 million outbound trips are made each year.

Although Hong Kong travellers are relatively sophisticated, the travel industry is conservative and not well defined. A handful of major agencies handling all aspects of travel dominate the market. Around 30 agencies can be classified as wholesalers, 150 are licensed to handle inbound travel/outbound ticketing and the rest handle ticketing only. Most travel agency front line staff has a limited knowledge of long haul destinations.

On-line travel companies such as Priceline.com were set up in Hong Kong in 2001 and Zuji, a travel portal powered by Travelocity was launched in November 2002. Booking and buying on line has become more accepted in the last 2 years. Of the destinations sold by the twonline agents, London is around 7th in the top 10 destinations and is the only long haul destination in the top 10.

Tour Operators

The market for the all-inclusive tour with a Chinese - speaking guide is diminishing. Tours now take in fewer countries than in the 1980s, when seven countries in nine days were typical.

Tour operators in the last few years have also started to offer air and hotel packages as well as special interest tours to keep up with changing travel demands. They are also organising special interest tours such as gourmet tours, tours to special events such as The Japan Car Show and world EXPO and activity tours that include skiing and spas/hot spring. About 5 tour operators also offer summer English language camps.

Travel Agents

Travel agencies deal with mainly ticketing or any combination of ticketing, corporate, incentive and leisure travel for individuals. There are 10 major wholesalers / retail agents selling major long haul destinations. There are around 25 companies that belong to the BritReps group. The group is made up of travel agencies, hotel groups, car rental companies, airlines that represent travel products.

Wholesalers : The market is dominated by a small number of key players that act as both wholesalers and retailers, supported by a consortia made up of over 1,380 travel agents in Hong Kong.

Wholesalers actively promote product and sell to different retail travel agents. They are Jetour Holidays, S.K.Y. Travel, Sincerity Travel, Travelex, Charming Holidays,

Farrington Amex and Westminster Travel. Large tour wholesalers take bookings from consumers, corporate and ticketing travel agents.

Several of the major European ground handlers, e.g. Gulliver's, Kuoni, Trafalgar and Miki, have offices in Hong Kong handling mainly business from local tour operators.

Representatives : A good range of travel products have representation in Hong Kong. BritRail, hotel groups, several ground handlers, the airlines, car rental companies, Great British Heritage Pass and London Travel cards. The trade prefer to book products with local representation.

Market Entry Strategies

The Overseas Markets Team at VisitBritain in London can provide lists of trade contacts in Hong Kong and the latest information. You are advised to make appointments in advance with VisitBritain Hong Kong. Make appointments to see any contacts before you leave Britain. You may need to chase them for a reply, as key contacts at travel companies are always very busy.

Bring a good supply of business cards with your title printed on them. Hong Kong people remember people by their business cards and exchanging cards is the first thing people do at meetings. Most people can read English and do not expect you to have business cards in Chinese. If you do make the effort to have business cards with a translated name, make sure you know how it is pronounced in case your contact decides to call you by your Chinese name.

Bring a supply of brochures with updated rates and tariffs. Cost and commission levels are all important factors and will determine whether your contact is interested in your product at the meeting. You will be losing a good opportunity if you do not have them with you at the meeting. You will not be taken seriously if you need to send them later. Most travel agencies work Mondays to Fridays and Saturday mornings. Avoid meetings on Saturdays as key contacts may not go into work and if they do, they will be busy clearing work that has piled up during the week. Chinese New Year is the most important holiday and peak travel season. Avoid visits the week before and after the New Year holidays. Most travel agents speak some English. Business suits are the preferred dress code. It is very hot and humid in the summer; so do bring lightweight clothes to avoid looking hot and bothered when you turn up for appointments. But bear in mind, once you are indoors, there will be air conditioning at full blast!

Taxis and the underground are the best ways to get around. Hong Kong taxis are cheap by international standards but most taxi drivers do not speak much English. Have the hotel concierge, your contacts write down in Chinese the address of where you are going to show to the taxi driver.

Commitment to the market is important. Just coming for one trip will not bring instant business. Personal relationships are important and need to be cultivated. Prompt replies and instant follow-ups will show you are serious in trying to get business.

India Business & Trade

Overview

The travel trade in India remains reactive and last minute. Most travel agents in India are only ticketing agents focusing on the lower end of the market.

The top 10 agents of most airlines are consolidators, operating on high volume and low margins through a network of sub-agents. The emergence of agencies servicing the individual traveller for their travel-related services is a relatively new phenomenon.

Group leisure travel peaks from the period mid-April to end June. This way they can take advantage of their friends hospitality or good hotel deals.

Top Five Producers: Kuoni India, Thomas Cook, Cox & Kings, Raj Travels and Orbit, make up the top five producers in India. SOTC, Kesari, CLUB 7, Dewan Travels, Narula Travels, Faraway Places and XPRESS holidays amongst others are also sending big numbers. There are hundreds of other agents who may not send such high numbers, but their passengers have a much higher "spend and stay". So quantity and quality both are important.

Retail Agents: Commission Level: 5% IATA commission allowed. The distribution of travel product in India is fragmented and predominantly retailer based. There are a few national companies, however, most agents are small, independent businesses.

Competition between the larger travel agencies is fierce, with aggressive marketing and tactical promotions in print media. Examples include 'buy now, pay later' promotions. The integration of IT technology in travel retail sector by top companies like Galileo, Amadeus, Abacus and Sabre for online booking of tickets and hotel reservations has led to cost benefits which have been passed on to tourists.

There are approximately 150 key agents in the 5 cities of Delhi, Mumbai, Chennai, Bangalore and Kolkata; however there are thousands of smaller agents or non-IATA agents/ tour operators, including business incentives and other agencies selling travel in one form or other.

Top Brochure Producing Agents

Kuoni/ SOTC
Cox & Kings
Kesari
Thomas Cook
TCI Travel Corporation Of India
Raj Travels
Orbit

Wholesalers / Large Agents

Commission level is 5% according to IATA, but Productivity Linked Bonuses (PLB's) are the norm, going up to 20%. The traditional wholesaler has not developed in the Indian travel industry, although a few larger agents are pursuing the development of their distribution network of smaller independent agents. Most large retail agents produce their own brochures and market their own programs with links to inbound tour operators. Large travel agencies take reservations from consumers through their own retail networks as well as from smaller agencies.

Examples of non brochure - producing wholesalers

Saltours

Earth Walk

Inbound Tour Operators

Commission Level: up to 30%

Inbound tour operators (ITOs) are a key link in the distribution chain, with several ITO'S actively developing the market.

Market Entry Strategies

Carry press releases, features and photographs as these can be used for media opportunities, even at short notice. October to February is the best time to visit weather-wise. March is not too late. Avoid April to September. Mumbai, Delhi, Bangalore and Hyderabad are the key cities to visit. Also Kolkata / Chennai / Amritsar and Ahmedabad, if time and budget permit. Proposed now for October 2006 in Delhi, Mumbai and Bangalore. You may need to do a bit of handholding initially, if agents are not very familiar with the product.

Japan Trade & Business

Overview

The fragmentation of consumer travel demand is putting huge pressure on a number of established travel firms. The traveller has become more discerning and sophisticated, and is gradually taking responsibility for his, or more likely her, own travel plans, and seeking value for money and time and lifestyle experiences. As a result there has been a change in the Japanese travel industry. It is now more specialised, and a more customer focused sector. This will continue.

As consumers' knowledge, demand and interest becomes sophisticated and diverse, the travel trade response needs to improve as the customer become well educated about destinations that they are selling. Also, major travel trade firms and airline groups have developed or are developing online booking sites.

Tour brochures by travel agents are a great influence over consumers' destination decision. There are more than 800 travel companies registered in Japan, and the top 12 represent 76% of outbound market. Planning cycle is normally 6 months, i.e. spring to summer tours are sold in January, and autumn to winter in August. The wholesale business model still dominates and 90% of outbound travellers depend on the travel trade for their booking on-line and off-line to avoid language barriers and secure assurance and guarantees.

Japanese travel agents therefore exert enormous influence over Japanese travellers in destination choice. 51% of overseas travel is a full package tour, 34% is FIT and 8% is special interest groups, and all are booked through the trade.

Qualitative research found that Japanese favoured skeleton-type packaged tours and air-only independent travel. Most tended to select package tour or independent depending on the circumstances. Most tend to select package tours when they are visiting a destination for the first time or when traveling with someone who is not familiar with international travel.

Travel Agents

All wholesalers compete for retail business and most wholesalers have a 'same-name' retail chain, which operate with relative autonomy. These retail offices of the large General Travel Agency's (GTA's) sell their own and other brand packages. Most GTA branch offices have a group sales force, an FIT section and retail counter.

INTEGRATED DISTRIBUTION

Japan has a highly regulated travel industry structure with 4 levels of travel agencies. The industry applies stringent and complex licensing laws, with high levels of consumer protection.

- First level agencies (GTA) - These companies wholesale/package and retail international domestic tours
- Second level agencies - These companies wholesales/package domestic tours only. They sell international products (produced by the GTA) to consumers as a retail travel agent. They do not package or wholesale international product
- Third level agencies - These are retail travel agencies that sell international and domestic packages produced by GTAs and second tier agencies. They have no wholesaling /packaging departments
- Fourth level sub agencies - These companies can sell domestic and international tours, but have no wholesaling/packaging departments. They are more likely to be implant agencies in larger organisations, such as those set up in the recent agreements between JTB and the convenience chain Seven Eleven.

Japan’s leading travel agency is JTB. Kinki Nippon Tourist is a major competitor of JTB, however its turnover is half that of JTB. These top 12 companies account for 76.4% of the outbound market share.

		(000 yen)	(Package brand)
1	JTB	304,257,741	Look JTB
2	HIS	176,050,065	Ciao,Impresso,Elegante
3	Kinki Nippon Tourist	163,844,567	Holiday, ClubTourism
4	Hankyu Express Intl	163,533,745	Trapix
5	Nippon Travel Agency	111,697,471	Mach
6	Nippon Express	96,928,474	Look World
7	JALPAK	91,795,921	I’ll, AVA
8	JTB World West	49,644,364	Look JTB
9	JTB World	41,101,215	Look JTB
10	Tokyu Travel	41,319,109	-
11	JTB Traveland	38,807,935	-
12	ANA Sales & Tours	35,257,956	ANA Hal

These inbound tour operators buy products, operate tours and provide product information for their parent companies. They also handle the ground arrangement for their clients and contracting with hotels as well as being responsible for evaluating new products and services that are suitable for the Japanese market.

Wholesalers

Top 5 wholesalers - for the UK: JTB, HIS, KNT, JALPAK, ANA. In addition to the 2 major brochure seasons, Shimoki (October - March) and Kamiki (April - September), wholesalers have begun packaging tours on a market demand basis taking advantage of last minute trends and peak travel periods. Major wholesalers provide national coverage by distributing packages through their own& other retail outlets.

Representatives

This is an effective method, but normally the most costly means of selling your products overseas. However it does have a few advantages. Your product is instantly bookable through the retail trade who have a toll free number they can use. Representative can distribute brochures and undertake marketing on your behalf. The representative has knowledge of the market so can offer advice on how the products should be packaged and sold.

There are two types:

1. Office Contact for only Travel Trade or PR & Media (no General Consumers). Their main role is to sell their products to travel trade and press & media.
2. Office Contact for all Travel Trade, PR & Media and General Consumers. Most Non-Japanese companies in the first instance appoint a representative, and then decide to open a GSA if the sales are successful.

Market Entry Strategies

The essence of success in the Japanese market lies in making efforts to understand the Japanese customer's mind. The Japanese emphasise quality, human relationships, perseverance, value-for-money and long term commitment.

Japanese companies see quality, commitment to the customer and value-for-money as essential and will not compromise on them. You must convince your Japanese customers that you will not compromise either. Getting business from Japan depends very often on personal contact. Effective personal contact can only be developed over time, either through a series of visits to, or representation in, Japan.

Once you understand the concept of 'honno' and 'tatema' you will find it easier to build relationships with the Japanese. It will also help you get over the feeling that sometimes the Japanese say one thing but mean, or do, another. Very generally speaking 'tatema' means the truth for public consumption, the general principle or public face. 'Honno' is the real truth; the truth in practice as it operates within a company. You should aim for 'honno' in developing business but at the same time show great respect for 'tatema'. It is hard for Westerners to fully appreciate or understand these concepts. An awareness of them will help you.

- Before your visit get the latest information on Japan and to find out whether your product is suitable for the Japanese market.
- **Ensure you understand** the basics of Japanese culture and business methods.
- **Make contact** with Japanese travel companies with offices in London before planning a sales visit to Japan.
- **Timing:** the best times for sales visits are January-May and Sept-early Nov.
- **Be clear** with your marketing concept and business strategy for selling your product to the Japanese market.
- **Introductions:** things go more smoothly if an acquaintance of a Japanese businessman or official arranges an introduction first.

- **Sales calls:** avoid cold calling. Make appointments in advance and ask for a map! Make sure to give at least 2 weeks advance notice when making appointments.
- **Key contacts:** find the key contact, usually at mid-management level. Every three to four years managers are shuffled around their organisations, so it is important to keep in regular contact.
- **Initial interest:** on your first visit your sales calls may not generate any business. Do not be misled by any apparent interest in your product. A trusting relationship must be built before anything but chance business materialises. Face-to-face contact is far more effective than any other form of contact. Decisions in Japanese firms are usually taken after a consensus has been reached. If the Japanese are slow to respond to your proposals it could well be because of the internal search for a consensus. It could also be that they are testing commitment.
- **Commitment to the market:** You must be prepared to take a long term view and persevere in the market for at least 3 years, and modify your product to meet Japanese needs where necessary. Keep the visits going. Send messages and New Year cards.
- **Letter writing:** your letters may not be answered. Decision-making may slow or it may simply be that the Japanese prefer to wait for the face-to-face contact.
- **Name cards:** have lots (Japanese on one side). These are exchanged immediately upon meeting. Present the card the right way round with two hands for the recipient to read. Treat your contact's card with deference.
- **Giving:** a small gift is common. Aim for quality. Price is less important. It must be nicely wrapped. Gifts are given just prior to leaving the office.
- **Bowing/handshaking:** most Japanese you meet are used to shaking hands. For bowing there is a complicated etiquette. A slight bow in response to a Japanese bow is all that should be attempted.
- **Language:** being accompanied by a Japanese speaker will help a lot. Most Japanese selling travel speak fair English.
- **'Hai' and 'Yes':** Hai is ambiguous with many meanings. Please understand that apparent agreement should not always be taken at face value.
- **'No':** one of the cardinal rules in conducting business conversations is never to cause discomfort. Thus a blunt 'no' is a faux pas.
- **Promotional material:** this should be in Japanese with full details. Limited holiday time means the Japanese need to plan before they depart.
- **Press releases:** Most Japanese companies will not run a risk on a new product. Make sure you have sent press releases done.

Business Visits / Events

Business Visits Trends

Japan now has a more confident population and an economy that appears to have turned the corner. Increased corporate profits, low interest rates and sustained productivity growth offer hope about Japan's competitive trading position. There is even serious debate that some of the protected domestic industries such as retailing, construction will

be opened to competitors. The upshot for tourism will be increased demand for both business travel and leisure from Japan. Business Travel promotional opportunities are there subject to prevailing economic growth.

Japanese companies see quality, commitment to the customer and value for money as essential and will not compromise on these issues. Getting business from Japan still very much depends on personal contact that can only be developed over time, either through a series of visits, or by representation in Japan.

Malaysia Trade & Business

Overview

There are over 1,000 travel agencies and tour operators in Malaysia. They are mainly concentrated in major cities like Kuala Lumpur, Penang, Ipoh, Johor Bahru and Kuching. The travel trade is important as most tourism product especially for international travel is still being booked through the trade.

A large number of the trade focus on inbound and regional outbound. The trade is also quite focused on their product offering, some specialise in Leisure and others have a stronghold on Corporate and Incentive Market. In the Leisure category, there is further distinction between Group Travel and FIT among the trade

The Leisure Travel market is mainly dominated by Small Medium Entrepreneurs of Chinese origin. They are very business savvy but not very sophisticated in terms of marketing. A number of them have websites which are mainly static pages with information. Most marketing activity is reliant on selling their products via newspaper advertisement and also during the consumer travel fairs. The Internet has not been considered as a valuable tool to market/sell but this is slowly changing.

Peak Booking Periods are; Chinese New Year (January/February), March (Consumer Travel Fair) and School Holidays (May, September, November & December)

Tour Operators

Tour operators are mainly for inbound tourism and they focus on local products.

Travel Agents

There are 651 retail travel agencies in Malaysia. Apart from a handful of large agencies, most are independently owned, small to medium sized businesses.

There are about 20 travel agents who actively promote Europe as a main Leisure destination. These are the agents that we will focus on and actively engage via consistent communication and also agent training programmes. Constant training is necessary as the turnover rate in this industry is high. **Commission Level : 10%**

Wholesalers

A few large travel agencies with their own retail networks produce tour programs, usually developed in conjunction with ground operators. These agencies take reservations from consumers and from a network of smaller travel agents, who are given a preferred commission structure.

There are 3 main players in the leisure wholesale market who actively promote Europe - Excellence Holidays, Golden Tour World and Parlo Tours. They mainly work with

ground operators's like Gulliver's, Kuoni and Miki. Boustead is the wholesale agent for BritRail passes in Malaysia. **Commission Level : 15 - 20%**

Representatives

Selling through a representative in Malaysia is an effective method that one may consider. Building awareness, disseminating information and handling marketing promotions is managed locally by the representative. Both trade and consumers generally feel more comfortable with the representative as the local “face” of the product/ service provider on territory. However, please be aware that the cost for this may be high.

Ground operators like Gullivers and Miki have local representatives and are preferred by agents as they are able to deal with last minute changes without the consideration of cost of calling Europe or time difference of 7-8 hours.

Market Entry Strategies

Sales Calls

Best Time for Sales Calls: February (after Chinese New Year and before travel fair), April, June to October. Avoid visiting the trade on public holidays. Please refer to www.cuti.com.my for holidays.

Key Market Centres to Visit: Key source markets accounting for 65% of outbound travel are Kuala Lumpur and Klang Valley. Key secondary markets are Penang and Johor.

English is the business language and is widely used and understood. Most travel agencies operate a 5 and a half day working week and are open from 9am to 5pm from on weekdays and from 9am to 1pm on Saturdays. Most travel agencies are located in the city centre. It is best to avoid appointments before 10am as there is a risk of being caught in rush hour traffic.

The best time to see travel agents will be mid week (Tues-Thurs). Avoid Monday mornings and Friday afternoons.

Appointments must be made in advance; otherwise you may expect to be greeted and met only by a junior staff member. Be sure to have a good supply of business cards and brochures with you. Use both hands to present and receive business cards with the writing always facing the recipient.

Malaysians are usually cordial, friendly and will be polite in expressing a desire to establish a business relationship. However, it is often only through repeated and constant communication over a period of time that results can be seen.

Malaysian agents are always on a look-out for bargains, so be prepared to negotiate and remember, even a small discount is considered as a winning point for them and will make them happy. A valid passport is required and no visa is needed up to a 3-month stay.

A suit is generally not required for business meetings; a shirt and tie are sufficient for gentlemen and a jacket and skirt and blouse or dress is acceptable for ladies.

New Zealand Trade & Business

Overview

The travel trade in New Zealand is basically made of wholesale and retail. One of the differences between Australia and New Zealand trade is that New Zealand wholesale and retail distribution are more advanced in terms of vertical integration.

Wholesalers: Most New Zealand wholesalers have their headquarters in Auckland, however some of the sports operators and larger retail agents dealing in groups can be in other areas.

Most of the retail distribution is strongly linked to the major wholesalers. Product can be highly influenced by wholesale, or wholesale serves their retail distribution network and delivers product more influenced by retail. The swing is determined by whether the wholesaler fully owns the retail network, partly owns or partly franchises.

The major wholesalers are:

- Gullivers Holidays, (absorbed Passport Holidays) with 40 owned outlets, 150 franchised shops, tour and ticketing operations and investments in three corporate travel agencies. Retail brands include Holiday Shoppe, United Travel, Gullivers Holidays and Zuji.
- Travelplan Holidays with 90 owner operator outlets branded House of Travel.
- Flight Centre's Infinity Holidays division with 107 owned retail agencies branded Flight Centre.
- Go Holidays (absorbed Aspac Vacations) with agreements with retail agencies branded Travel Smart and 40 Harvey World Travel agencies. They also work with Flight Centre.
- Gullivers

Holidays bought British Travel Company Pacific International with businesses in New Zealand, Australia and Britain late in 2005 and since listing on the NZX. It is reported that Gullivers Holidays and Go. Holidays will be seeking synergies in operations flowing through in.2007.

Air New Zealand wholly owns a wholesale division, Air New Zealand.Holidays, and has recently launched dynamic packaging functionality on its main consumer website. London is about to be featured. Gullivers provide this through a partnership with Zuji.

Marketing Representation: Marketing representation is available in New Zealand from a number of companies, who will agree a budget and marketing plan beforehand.

Travel Agents

There are approximately 680 accredited IATA retail travel agencies in New Zealand, with approximately 3,000 people employed in the retail travel sector. The majority of these agencies are members of Travel Agents Association of New Zealand and as such adhere to a code of conduct, which includes the provision of a financial bond. 70% of TAANZ agents are in the North Island.

As mentioned above, major wholesalers and retail chains wholly own many retail agencies. Of the remainder, many are franchised or belong to a travel agent collective benefiting from membership deals. There has been a marked increase in group-owned and franchised agencies in recent years with many of the chains merging.

Travel agency chains are affiliated to particular wholesalers and will support their chosen preferred wholesaler's product.

Agencies are highly computerised with almost 100% access to CRS systems.

Market Entry Strategies

One of the best ways to target the trade is to make contact with them face to face via sales calls. Make an appointment to see VisitBritain in Auckland before your visit. They will update you on the state of the market, the locations of various offices etc. The main planning months in New Zealand are March, April, May, June and July. Any later than that and you will more than likely have to wait until the following year for any influence on programmes. Most wholesalers' brochures will appear in the New Zealand market place in October/November.

The busiest UK promotional period in New Zealand is November through to April (New Zealand summer time). November and February are the two busiest months. You may have difficulty in seeing the people you wish to, as they are often busy launching promotions and new products.

Business hours are 0830-1700, although people will often be in the office earlier or later. New Zealanders are very informal in their manner and will generally prefer to use first names. They do however respect punctuality.

Singapore Trade & Business

Overview

Post-SARS, there have been dramatic changes in the number of travel agencies in Singapore. Although the number of registered outbound agents hover around 450, not all of them are active. The majority concentrate on offering regional travel in Asia.

Singapore was the first market in Asia with a trend towards direct bookings, particularly for FIT packages. The smaller and medium sized agents tend to use the traditional Inbound Tour Operator distribution chain.

NATAS Travel (March) and NATAS Holidays (September) are two popular yearly consumer travel fairs organised by NATAS (National Association of Travel Agents Singapore) attracting about 50 000 consumers each to the 3-day event. Independent travel fairs are also often organised by the larger travel agencies usually a month before the travel fairs.

Airline price wars sparked by the launch of low cost carriers (LCCs), consumers are driven by last minute deals, often waiting to making a booking at the very last minute to obtain a better deal.

Travel Agents

Approximately 20 agencies are active in the major players in the market: Ananda Travel, Anglo-French Travel, American Lloyd Travel, Chan Brothers Travel, Commonwealth Travel, Diners Worlds Travel, Dynasty Travel, Gasi Travel, Holiday Tours and Travel, Olympia Travel, Pacific Arena Travel, Sakura Holidays, STA Travel, Scenic Travel, Sino America (UIC) Tours, Tradewinds Tours & Travel, Travelex Singapore, and UOB Travel Planners. **Commission Level : 10%**

Wholesalers: The traditional wholesaler has not developed in Singapore. Only a few retail agencies may produce their own programmes and market to their own retail network and affiliates. **Commission Level : 15 – 20%**

Representatives: Building awareness, disseminating information and handling marketing promotions is managed locally by the representative. However please be aware that the cost attached to this may be high. In addition, many Singaporeans use airlines that fly indirect with a stop or two - Malaysia Airlines, Thai International, Emirates, Qatar, Cathay Pacific, Air France, KLM, Royal Brunei etc.

Market Entry Strategies

Sales Calls

Before your visit to Singapore get the latest information on Singapore. English is the business language and is widely used and understood. Many organisations operate a five-and-a-half-day working week. Most shops are open from 10am to 9pm daily including Saturdays, Sundays and public holidays.

Many agents prefer to deal in net rates, so be prepared to be flexible.

Singapore has a warm and humid climate throughout the year, with a daily average temperature range of 24°C to 34°C.

A suit is generally not required for business meetings; a shirt and tie are sufficient for gentlemen, and a jacket and skirt and blouse or dress, is acceptable for ladies. Casual dress is acceptable for most situations and occasions, but some establishments may require a more formal dress code.

Appointments must be made in advance; otherwise you may expect to be greeted and met only by a junior staff member. It is generally difficult to gain appointments with senior trade contacts without personal introductions. The exchange of business cards is normal business practice. Make sure you bring enough cards to exchange with everyone you meet.

There is an efficient public transport system and signs are all in English.

South Korean Trade & Business

Overview

There are no clear differences between wholesalers and retail travel agencies in the Korean travel system.

There are tour operators both in Seoul and in London. Travel agents usually work with tour operators based in Seoul and the Seoul tour operators work with tour operators based in London. This means travel agencies control the relationships with Seoul tour operators under them. London tour operators are under Seoul tour operators.

However, there are also some cases where London tour operators work directly with travel agencies. London tour operators work with several tour operators in Seoul. Tour operators both in Seoul and in London can develop tour products for travel agents (Travel agencies also create tour products). The relationships are rather complicated.

The downturn in the Korean economy stimulated a restructuring of the travel trade with weak agencies being forced out of business and consolidations and mergers of the remaining ones.

The travel trade also had to respond to the changing consumer demand for independent travel.

Tour Operators

The biggest tour operator is Gulliver Travel Association Korea. The majority of tour operators are small in size. There are only a few true wholesalers in the Korean travel industry such as Hana Tour, Mode Tour (Kukil Travel) and OK Tour. They take 9%-12% commission.

Travel Agents

There are three different types of travel agents depending on the type of licenses they hold. These are general, overseas and domestic. From the legal term, overseas travel agencies in Korea include:

- General Travel Agency (GTA) dealing with inbound and outbound travel.
- Overseas Travel Agency (OTA) dealing with outbound travel only.

The GTA's have a big influence on outbound marketing. There are around 760 GTA and 3,900 OTA travel agents nationwide. The GTA's are the most influential and important agencies for outbound business. Generally, retail agents take 12%-15% commission (high season and honeymoon packages) and 7%-10% commission (low-season periods for major travel agencies only).

Market Entry Strategies

Sales Calls

Before you visit get the latest information on the South Korean market, for example, to make sure that your products or services are suitable for the South Korean market.

Advance appointments are essential to ensure a meeting with senior staff.

Bring enough business cards to exchange and bear in mind that Koreans should not be spoken to by name without the appropriate prefix, e.g. President, Professor, Mr, Mrs or Miss. Only if they use their given name should you do so.

Send promotional materials with your company's website address by post beforehand so that your future partner can get more detailed information of your company. When these are not in Korean, a summary in Korean would be very effective. Avoid visiting Korea during the summer holiday season from June to August, which is the busiest time.

Seoul, which dominates the tourism market in Korea, is the key city to visit.

Thailand Trade & Business

Overview

There are roughly 800-1,000 travel agencies and tour operators in Thailand, concentrated in major cities such as Bangkok, Chiang Mai, Pataya and Phuket. While online booking is on the rise, travel agencies continue to play dominant roles in the Thai market as a means for consumers to purchase and book their travel, particularly international travel.

The travel trade industry in Thailand is fragmented, with different ranges of travel agencies, ranging from small, to medium and large. In the past 10 years, there has been a gradual shift towards smaller agencies operating to cater for independent travellers. Traditionally, the international travel market in Thailand has been dominated by a few large agencies such as Takerng Tour, Roongsarp Express, MD Tours, Siam Express, and GM Travels, which are prominent in group travel.

There are a few recognized travel associations such as the Thai Travel Agents Association (TTAA) and the International Travel Association (ITA), which play active roles in promoting domestic and international travels. TTAA has over 800 members and holds annual events, such as international travel expo, sports days, and familiarization trips for tour agencies. In addition, TTAA also hosts country-specific international travel fairs in conjunction with various airlines and national tourism boards, such as Australia, China, Korea, etc.

With the rise of internet and online booking, smaller independent ticket agents have also emerged to serve the needs of customers. These ticket agents have more international experience and are more comfortable with booking online. However the number of online customers and agencies is still relatively small but are rising.

Most Thai travel agencies book through Gullivers, Kuoni and Miki, with Gullivers seeming to have a dominant position, particularly vis-à-vis UK travel products. A handful of agencies specialize in the corporate/incentive segment, with clients ranging from insurance companies, beverage companies, to pharmaceutical and multinational companies. While a myriad of travel agencies exist in big cities, it is only the big companies with clout and connections that win clients from large MNCS and government officers. Most are companies that have been established for some years and have cultivated enough goodwill, reputation and relationships with airlines and government officers. In contrast to group travel, leisure travel market does not seem to be dominated by any particular company. Company size ranges from small to medium, with most products being advertised through newspapers and travel magazines, both in Thai and the English languages.

Travel Agents

There are over 800 travel agencies in Thailand, although most are small start-ups, independent agencies. A handful of large agencies have dominated the traditional group outbound travel market. There are roughly 20 travel agents who actively promote Europe as the main leisure destination. These are the agents that we will focus on and actively engage via consistent communication and agent training programmes. Constant training is necessary as the turnover rate in this industry is high. Australia has been successful partly because of its constant and continuous agent training programmes and familiarisation trips (Aussie Specialists). In addition to mainstream travel agencies, educational agencies are also key influencers for UK travel products, as they promote UK study. There are around 50-100, most are members of TIECA (Thailand International Consulting Agencies), which is sponsored by the Thai government and the British Council. **Commission level: 10%**

Wholesalers : A few large travel agencies with their own retail networks produce tour programs, usually developed in conjunction with ground operators. These agencies take reservations from consumers and from a network of smaller travel agents, who are given a preferred commission structure. There are a few handful "wholesale" players which actively promote Europe, namely Holiday Tour, Cosmos, and GM Tour, and Siam Express, whose products are mostly sourced from either Gullivers, Kuoni, or Miki. This is not yet an exhaustive list as the market is still being analysed. **Commission level: 15 – 20%**

Representatives : It is often a preferred choice to have representatives of UK products on territory as they can work with Thai counterparts more efficiently. However, it is not necessary to have an actual representative on the ground if cost is a concern. Visit Britain advises that the UK trade show continued commitment, either through regular contacts (email/phone/fax/websites), information sharing/updates or some actual visits. Visit Britain Thailand can help act as a facilitator amongst local Thai agencies with UK travel trade.

Market Entry Strategies

Before your visit get the latest information about Thailand. Preferred language is Thai, although several travel agencies do speak English. Be prepared, however, to accept the low level of fluency and to check to make sure that the message is being properly understood.

- Many travel agencies are open from 9am to 5pm from on weekdays and from 9am to 1pm on Saturdays. Most agencies are located in Bangkok and easily accessible by taxi, sky train or subway.
- The best time to see travel agents will be mid week (Tues-Thurs). Avoid Monday mornings and Friday afternoons.

- Appointments must be made in advance, otherwise you may expect to be greeted and met only by a junior staff member. Be sure to have a good supply of business cards and brochures with you.
- A suit is generally not required for business meetings; a shirt and tie are sufficient for gentlemen, and a jacket and skirt and blouse or dress, is acceptable for ladies.
- Avoid Public holidays (check Thai National Holidays). Trade Fairs. Several trade fairs are held throughout the year. These events offer excellent opportunity to sell British destinations and products to the trade.

Austria Trade & Business

Overview

The Austrian travel industry has a structure very similar to the one existing in Germany where a few players dominate most of the industry. It seems likely that the Austrian travel industry will eventually consist only of large tour operators and travel agencies belonging to big groups, plus some small tour operators working on niche markets. As in Germany, the tour operators mainly sell through the retail trade and/or their own agency chains. Among the 10 largest tour operators, most are in the hands of German or Swiss companies.

Austrian travel experts foresee increasing competition for travel agencies (on-line bookings) and lower commission and thus advise travel agents to focus on their core competencies: product knowledge and advice. The role of travel agencies with respect to counselling and actual booking is still very strong in Austria and the demand for product knowledge is increasing.

Tour Operators

In Austria one third of the travel agents are also tour operators, with the distinction between tour operators and travel agents not as marked as, for example, in Germany. The German operator consortia, such as Thomas Cook, Rewe and TUI are also active in Austria (Thomas Cook with their brand Neckermann). Dodo Tours is a fairly small operator but specialises in trips.

Tour operators' in Austria usually plan the forthcoming year's programme in September / October.

Travel Agents

According to the Austrian Chamber of Commerce, Austria has 2,450 travel agencies employing approximately 9,500 people. This is a relatively high density with about one travel agency for every 3,300 inhabitants.

The majority of retail agents only sell operators programmes and concentrate on products from the few big players to achieve higher commission levels. The Travel Star group was founded amongst other reasons to insure a better commission. As well as being Austria's biggest travel agency group with 280 travel agencies, it now has the greatest turnover in the market. The German TUI is present in the former 'Dr. Degener Reisebüro', now known as TUI Reisecenter Salzburg, and in the Tiroler Landesreisebüro. Most of the travel agencies' revenue comes from packages, followed by incoming tourism activities, selling air tickets and business travel.

Market Entry Strategies

- Get the latest information on the Austrian trade before visiting Austria. Obtain a copy of our Travel TradeDirectory for Austria.
- If you do decide to visit Austria it is essential to make appointments. An introductory letter or fax is essential (not necessarily in German) with relevant background information.

It is important to consider the timing of your visit. The large tour operators research their main season programmes between April and June. These programmes are costed between July and September and launched in November/December. The smaller specialist operators tend to research their programmes slightly later in July/September for a launch in January/February. Off-season/city-break operators research their winter programmes in March/April, for launching in July/August.

Check to ensure that your trip does not coincide with a public holiday. As is the case in Britain, many people choose to take a long weekend around these dates, especially in the spring and summer. Provide the operators you are visiting with a comprehensive information pack about your product.

Belgium & Luxembourg Trade & Business

Overview

The Belgian travel trade is made up of tour operators, coach operators and travel agencies. In addition, associations such as walking and cultural clubs or evening college will also organise holidays for their members.

Tour operators: sell their products through their own or independent travel agencies. Increasingly, they also sell directly to the consumer through the Internet.

Coach operators: usually sell their products through their own or independent travel agencies.

Group Operators: are limited in Belgium and represent a high volume of visits. These operators tend to split into the youth, seniors and special interest segments.

Travel agencies usually sell products produced by tour or coach operators. Some travel agencies, however, also have a group department, which organises holidays for associations.

As Belgium is a little under average on Internet access European-wide, and as customer confidence in the Internet (especially payments) is far lower than the Dutch/British levels, the travel trade is still very important, particularly for the purchase of transport tickets.

Tour Operators

Belgian tour operators are always looking for new ideas and products in order to get one step ahead of the competition and respond to the ‘tailormade’ preference of the ever-demanding holiday maker. They usually go directly rather than using the expertise of ground handlers.

Major operators: The tour operating industry has changed considerably over the last few years with now only two market-leaders who share close to 80% of the tour operating market: TUI Belgium and Thomas Cook, with their different tour operating branches (brands) and also their own retail outlet networks. They are all located in the North part of Belgium (Flanders). The travel agencies are working closer with the major operators as this spares them time and money but often results in standardised products across the market.

Specialist operators: While the total number of key tour operators is reducing, we are monitoring an increasing number of niche operators (special interest holidays such as cycling, walking, cultural, theme and garden tours) who are planning programmes.

Coach operators: There are 488 coach companies in Belgium but only a minority have their own brochure. The majority produce flyers with short programmes/offers and mail these to their faithful customers. Approximately two thirds of these are Dutch/Flemish speaking. Special attention should be given to them, as the coach market is the one that has declined most over the recent years. Although last year’s figures showed a decline in total coach tour holidays market, carriers have reported fairly encouraging signs of recovery from the group market.

Unless one comes with a spectacular offer, the large companies reaching the masses are difficult to reach and influence, whilst smaller operations are easier to contact and can provide tailor-made services, but only to a small number of clients.

Brochure planning takes place from January to March for the winter brochures (valid November to March) and June to October for the summer brochures (usually valid from April or Easter to October).

Travel Agents

There are almost 2,000 retail outlets in Belgium - too many according to travel industry experts. Airlines have stopped giving commission and the Belgian travel agents have to create added value to survive and are aiming to do so through adding value to their services and/or expanding their services online.

In general, the agencies will sell tour operators’ products, but some also have groups departments, which plan special tours and excursions for an association or a newspaper to support an article about a special destination.

Finally, approximately 600 travel agencies are part of a chain (ThomasCook, TUI, etc)

Market Entry Strategies

Timing: Tour operators start preparing their winter programmes in March/April and their summer brochures in August/September. Avoid calls in July and the first half of August as people are generally on holiday.

Public Holidays

1ST Jan –
17th April – Easter Monday
1st May – Labour Day
25th May – Ascension
5th June – Whitsun
21st July – National Day
15th August – Assumption
1st November – All Saints
11th November – Armistice
25th December – Christmas Day

Transport: You are better off travelling by car, unless in the Brussels area. Driving is more aggressive than in Britain and motorways can be congested, but agents are situated all over Belgium and a car is a necessity if you want to meet them.

Etiquette: There are a few very basic rules: send contacts a letter of presentation with a simple fact sheet about your company. Make an appointment by phone and ask them to send you their brochure; study the content and the competition featured reconfirm your appointment by phone, fax or e-mail a couple of days before your visit. Prove that you mean business by following up as soon as you get home. Finally, remember that loyalty pays. Remain faithful to your Belgian business partner and they will remain faithful to you.

Language/ culture/ currency: It's generally easy in Belgium to get by with English. Flemish is the spoken language in the northern part of Belgium. If you cannot make yourself understood in English, only change into French if you are invited to. Do not suggest doing so yourself and do not produce literature in French when talking to a Flemish agent or vice versa.

Czech Republic Trade & Business

Overview

The travel industry in the Czech Republic went through some major changes in last couple of years. After a bankruptcy of several travel agencies in the 90s, the Czech government eventually brought in legislation and in 2000 a new act regulating travel business was made law. The situation in the tourism industry is now becoming stable and major international agencies as a TUI are investing into the Czech tourism market.

Major travel agencies are members of The Association of Tour Operators and Travel Agencies of the Czech Republic (ACCKA). This association is a guarantee of quality for the associated travel agencies because its membership conditions are very strict and tight.

The majority of Czech travel agencies and tour operators are rather small companies. Some of the major competitors on the market are: Eximtours a.s. is the biggest travel office in the Czech Republic (their major investor is TUI), CEDOK a.s., FIRO-tour a.s. and GTS International.

Eximtours is orientated mainly towards sun and exotic holidays.

Cedok offers a wide range of tours but also exclusive and business travel. Cedok is the only travel office that has survived the Communistic period and as the oldest (founded in 1920) is very well known to the public.

FIRO-tour has been on the Czech market since 90s. It offers tours, sun holidays, ski holidays etc. abroad as well as in the Czech Republic.

The GTS International is specialised mainly in budget travelling for student and individual travellers. It has a large number of customers especially amongst young people.

The smaller travel agencies usually try to specialise in some field such as skiing, adventure holidays or a specific region.

Market Entry Strategies

The best way to reach the Czech travel trade is to cooperate closely with TTG and COT, the two main travel trade media in the country, and to attend Holiday World, the biggest Czech travel trade exhibition. Czech travel trade do not specialise in certain destinations.

Reaching the Press

Britain already has a great image in Czech republic and by far the best way of approaching the Czech press is to find a theme linked to the UK (e.g. fashion, football, golf, yachting, outdoor, music, film premieres, etc.) and use it to attract interest.

Denmark Trade & Business

Overview

There are around 1,000 tour operators and travel agencies in Denmark, with a large number of sales outlets; even the Danish tourist information centres act as sales outlets for the local communities. Most major operators are in Copenhagen, although you will also find a number of important operators in the larger cities.

The Association of Danish Travel Agents and Tour Operators (Danmarks Rejsebureau Forening www.drf-dk.dk) is the official trade association with 300 members.

A few large charter companies dominate the leisure travel market in Denmark. In addition, there are four large wholesalers, a number of medium-sized operators and small specialist tour-operators with niche products. The large ferry and tour operator, DFDS Seaways, is one of the biggest operators. Like the large tour operators, it sells its products in travel agencies all over the country.

Tour Operators

There are a large number of tour operators spread all over Denmark, including large and medium-sized coach operators. In many cases the smaller operators arrange one or two round trips per year. The biggest operators are DFDS, DSB rejsebureau, Gislev Rejser, Kuoni Travel, Profil Rejser. For contact details see the Denmark Travel Trade List.

In general the operators start planning their summer programmes in September, and the winter programmes in March.

Most of the operators have one or more partners who assist them with their various products. Once they have established a good working relationship with a ground handler they normally hold on to that partner. Some experienced operators, however, prefer to deal direct with the suppliers and have been doing over the years.

The bigger tour operators, like Profil Rejser, DSB tours, Kuoni Travel, sell their products via a large number of sales outlets all over the country. Many tourist offices also act as sales agents for the tour operators.

Coach tour operators

The coach travel market is dominated by a few large operators. In addition, there are numerous small, often family-run operators. Holidays by coach remain popular as many special interest tours or round trips primarily use coach transport. Often these use flight transport to Britain and hired coach transport within Britain.

Travel Agents

General travel agents sell the products of the large tour operators. They are in high street locations and deal in all kinds of travel, including business travel. Many tourist offices also act as sales outlets for the products of the large operators, e.g. DSB travel agencies, Kuoni Travel, Profil Rejser.

Market Entry Strategies

Trade Fair: FERIE and FERIE FOR ALLE are visited by both trade and consumers.

Sales Calls – Top Tips

Before your visit get the latest information on the Nordic region.

Cold calling is not advised, so before arriving you must make appointments with the people you want to meet. However, please give advance warning. Make appointments one to two weeks in advance and reconfirm them a few days before.

The most important thing to remember is whether your product is going to be easy to sell and administer. The trade looks for volume and easy-to sell products, hence the computerisation of the industry. Commission varies but is normally 7%-10%.

Send your brochure or mail a link to your website in advance. That way you will give the recipient time to digest the contents.

The typical working day in the travel trade is approximately 0830 to 1700 with a lunch break of between 30 minutes to an hour. Long, liquid lunches are not the style.

In the summer, from mid-June to August, many people will be away on holiday, and others may leave the office as early as 1500. Also try to avoid arranging appointments on Friday afternoons.

Easter is a major holiday-taking time. Visits in the spring should also be carefully planned, as there are several public holidays in these months (see Public holidays below).

Sales calls are necessary, particularly for hotels and handling agents who wish to make a mark, at least once a year and preferably twice if you are serious about the market. Once you make an appointment, try and stick to it and do not be late. Punctuality is expected.

Always respond to e-mails and faxes within 24 hours.

Meetings should be used effectively. It is considered impolite not to be prepared. Try and use the first part of the meeting to find out as much as possible about your client's needs and those of their customers.

Remember, listening can be as effective as talking.

Finally, follow up! Easily and all-too-often forgotten. After your visit, renew contact with both those you did see and those you were unable to see.

Public Holidays

Jan 1 2006
New Year's Day.
Apr 13 Maundy Thursday.
Apr 14 Good Friday.
Apr 17 Easter Monday.
May 12 Common Prayer Day.
May 25 Ascension.
Jun 5 Whit Monday; Constitution Day.
Dec 24-26 Christmas.
Dec 31 New Year's Eve

Finland Trade & Business

Overview

Finland’s official travel trade body is the Association of Finnish TravelAgents (AFTA), from whom a directory of all members can be obtained. There are approximately 250 travel agency licences in Finland, with the number of retail outlets – including tour operators – totalling about 450. The Finnish travel industry is very concentrated. There are a few very large players in both the business and leisure sectors, with branch offices throughout Finland. Finnair is a major influence on the market the airline owns some of the most significant players in both business and leisure sectors. Many operators and agents handle both leisure and business travel.

Tour Operators

Many operators have world or Europe-wide brochures incorporating Britain programmes.

Coach tour operators

These tend to be small family-run businesses, with a few exceptions. The coach market has declined in recent years and whilst it has probably reached its lowest possible point, the air sector continues to grow.

Special interest operators

Finland has a few specialist agents operating in the youth, sports, culture and seniors markets. With a few exceptions, most notably the youth market, they tend to be small, privately run businesses serving niche markets.

Travel Agents

Most retail agents come into contact only through the sales of Finnish tour operator packages. Very few will seek a direct contact with a supplier to serve their clients, as they will always be looking for the easiest and quickest way to sell a product. Approaching retail agents is therefore not usually advisable.

Market Entry Strategies

Sales Calls – Top Tips

- Before your visit get the latest information on the Nordic region.
- Cold calling is not advised, so before arriving you must make appointments with the people you want to meet. However, please give advance warning. Make appointments one to two weeks in advance and reconfirm them a few days before.

- The most important thing to remember is whether your product is going to be easy to sell and administer. The trade looks for volume and easy-to-sell products, hence the computerisation of the industry. Commission varies but is normally 7%-10%.
- Send your brochure in advance. That way you will give the recipient time to digest the contents.
- The typical working day in the travel trade is approximately 0830 to 1800, with a lunch break of between 30 minutes to an hour. Long, liquid lunches are not the style.
- In the summer, from mid-June to August, many people will be away on holiday, and others may leave the office as early as 1500. Also try to avoid arranging appointments on Friday afternoons.
- Easter is a major holiday-taking time. Visits in the spring should also be carefully planned, as there are several public holidays in these months (see Public holidays below).
- Sales calls are necessary, particularly for hotels and handling agents who wish to make a mark, at least once a year and preferably twice if you are serious about the market. Once you make an appointment, try and stick to it and do not be late. Punctuality is expected.
- Always respond to e-mails and faxes within 24 hours.
- Meetings should be used effectively. It is considered impolite not to be prepared. Try and use the first part of the meeting to find out as much as possible about your client's needs and those of their customers. Remember, listening can be as effective as talking.
- Finally, follow up! Easily and all-too-often forgotten. After your visit, renew contact with both those you did see and those you were unable to see.

Market Entry Strategies

Public Holidays 2006

Jan 1 2006	May 25 Ascension.
New Year's Day.	Jun 24 Midsummer's Day.
Jan 6 Epiphany.	Nov 1 All Saints' Day.
Apr 14-17 Easter.	Dec 6 Independence Day.
May 1 May Day.	Dec 24-26 Christmas.

Germany Trade & Business

Overview

There are an estimated 4,000 tour operators and more than 17,000 retail travel agents in Germany. Competition is very fierce and after a series of take-overs and mergers there are now four tourism groups clearly dominating the market. Tour operators are evenly spread all over Germany but there is a concentration in the Frankfurt, Munich, Hamburg and Düsseldorf/Cologne areas.

The German travel trade can be split into three major categories:

Reiseveranstalter: Tour Operators

Paketreiseveranstalter: Package Wholesalers

Reisebüros: Travel Agencies

Tour Operators

There are about 250 operators offering Britain products varying from comprehensive all-Britain programmes to more specialised products (e.g. golfing holidays). The large volume operators who dominate the market sell mainly through the retail trade and have a widespread distribution network throughout Germany. The smaller, more specialist companies only sell direct to the public through adverts in papers, direct mail or VisitBritain publications. Some of the major operators (e.g. DERTour, Wolters and FTI Touristik) can afford to insist on very tough commission agreements (20% or more) with suppliers.

Package Wholesalers (Paketreiseveranstalter)

These are package operators selling ready-made tours mainly to coach operators although they increasingly also offer flight packages and group travel generally. Due to the recent problems with constant changes in the exchange rate, more and more small and medium-sized coach operators are now buying packages from German wholesale operators rather than from handling agents based in Britain as this grants them more financial stability. Coach tour companies are becoming increasingly specialised in areas such as themed and special event tours. Larger package wholesale companies, especially, produce an impressive volume of business to Britain and can afford to ask for fairly tough conditions.

Travel Agents

The majority of retail agents only sell the larger tour operator programmes and concentrate on products from the few big players to achieve higher commission levels. There are about ten big chains of retail agents with branches all over Germany, most of which also arrange ad-hoc group travel. However, the number of independent, small agencies is still very large. Due to new high insurance costs introduced two years ago, most agencies have stopped doing ad-hoc group arrangements.

VisitBritain runs an online training scheme for retail travel agents in Germany, Austria and Switzerland.

Market Entry Strategies

Trade Fair

ITB, Berlin

ITB Berlin is the largest German tourism fair, with both trade and consumer visitors. It runs for five days of which 2 and a half days (Wed – Fri AM) are trade-only and 2 and a half days (Fri PM – Sun) are for trade and consumers.

In 2005, the fair was attended by 142,000 visitors of which almost 60% (84,000) were trade and over 7,000 journalists. Almost 10,000 companies exhibit at ITB. 28% of the trade visitors of ITB are non-German. Due to Berlin's vicinity to the Polish border, more and more trade visitors from Poland take the opportunity to visit ITB. This event takes place in the middle of March. The 2006 dates are 8th – 12th March.

(www.itb-berlin.com)

Sales Calls

Germany is a large regionalised country with the travel trade concentrated around several cities, often with large distances between them. Therefore, before you embark on what could turn out to be a very costly and time-consuming sales visit to Germany, VisitBritain recommends that you take the following steps:

Talk to VisitBritain London about the range of services devised by VisitBritain to enable you to target your customers more effectively.

Participate at ITB Berlin or take an entry in the annual Agent's Sales Guide or Groups Guide (published in September) or the regular travel trade e-newsletter, *britain e-news* (nine electronic editions per year).

It is also important to note that a significant number of the key Britain players visit the World Travel Market, British Travel Trade Fair, Visit Scotland Expo and Showcase Wales. Please contact VisitBritain London for details of those attending.

If you do decide to visit Germany it is essential to make appointments. An introductory letter or fax is essential (not necessarily in German) with relevant background information.

It is important to consider the timing of your visit. The large tour operators research their main season programmes between April and June. Some may visit Britain during this time

to contract accommodation and visit new attractions/regions/products to be included. These programmes are costed between July and September and launched in November/December. The smaller specialist operators tend to research their programmes slightly later in July/September for a launch in January/February. Off-season/city break operators research their winter programmes in March/April and launch them in July/August.

Check to ensure that your trip does not coincide with a public holiday (see below). As is the case in Britain, many Germans take a long weekend around these, especially in the spring and summer.

Reaching the German Travel Trade cont...

Check on whether there is a large trade fair happening in the city you are visiting, as it may be impossible to find a hotel room.

Provide the operators you are visiting with a comprehensive information pack (preferably in German) about your product. On your return to Britain ensure that you follow up quickly and renew contact regularly.

Keep in touch with VisitBritain; let us know about your progress. Regular market intelligence is essential for our future plans and activities.

Bear in mind that it is not going to happen overnight! Germany is a huge, complex and very competitive market that requires hard work and commitment. It may take several years to become established and to achieve any sort of return.

Public Holidays 2006

January 1, January 6 (not all states), April 14, April 16, April 17, May 1, May 25, June 4, June 5, June 15 (not all states), August 8 (Augsburg), August 15 (Bavaria, Saarland), October 3, October 31 (not all states), November 1 (not all states), November 22 (Saxony), December 25, December 26, University holidays are from mid-February to mid-April and mid-July to early October. Six-week school holidays vary from state to state, and fall in the period from July 1 to September 13. Easter and Christmas holidays also vary considerably. Please check details with the VisitBritain offices in Germany.

Reaching the Press

Britain Calling

‘Britain Calling’ is VisitBritain’s main ‘destination’ news service for the overseas press, highly regarded by the media around the world and distributed in three main ways:

Direct by email to 900 key foreign media contacts in 40 countries.

Via VisitBritain’s press officers in 35 markets, who use it to communicate with media in their respective country.

On the Internet via VisitBritain’s on-line Press Centre:

www.visitbritain.com / press centre – including a selection of hi-res images. Some 5,000 journalists per month visit the site.

Business Visits / Events

Business Visits Statistics

34% of travel from Germany to the UK was for business purposes, and this accounted for 32% of spend (IPS) in 2004.

German Business visits are made up of 11% Conferences, Large Meetings, Trade Fairs or Exhibitions and 89% individual business travel.

Business Visits Trends

65% of all German business trips are domestic, 35% are international. Decrease of long-haul trips.

Since 2002 steady increase of trips to European destinations; in companies with more than 500 staff, the number of trips to European destinations has increased from 1/5 to 1/3. Business trips are getting shorter (average 2.4 days; 48% of all trips last only one day)

Continuing price consciousness (increased use of low-budget airlines; negotiation of special rates; increase of online bookings)

Incentive houses / agencies play an important role: 61% of corporate planners use an incentive house to organise a programme for them.

Top reasons for selecting a destination are ease of access, high standard of facilities, high professional standard/standard of service and value for money. Britain scores highly in the first three.

Controlling tends to be stricter than in previous years. To make a stronger “business case”, incentive trips now often include a meeting element or some sort of business-related activity.

Hungary Trade & Business

Overview

The tourism market in Hungary is currently in the process of very significant development and transformation in terms of specialization, streamlining and consolidation

Until 1990, there were only a few Hungarian travel agents, all of them state-owned. In 1991 to 1995, there was an explosion in the establishment of small (below 5 employees), private travel agencies. The market situation changed dramatically when large, foreign wholesalers of tours, including Neckermann, BTI, Amex, CWT began opening offices in Hungary.

Currently, there are approximately 1200 travel agents in the tourism sector, only 200 having IATA rights to issue airline tickets. The majority of Hungarian travel offices are rather small companies with up to five employees.

The Hungarian travel market is not specialized. Due to the fact that Hungarian travellers are very price conscious, only a small margin can be applied on sales leading to better efficiency in selling volume tourism instead of demanding, specialized tours.

Only a few Hungarian tour operators and travel agencies can be compared in terms of generated volume and proficiency to the well known Western European firms. The remainder of companies in the market is expected to become travel agents representing large tour operators.

All agencies recognise the need for massive investment in technology to remain in business. Most of the agencies are computerised. Internet and booking system technologies are being actively used by most of them. The smaller companies are finding that margins are under pressure and that they can no longer run the operation as a family business.

Tour Operators

The top five tour operators offering a wider range of travel products are:

- **Ibusz:** Existing for more than 100 (!) years on the market and having 48 branch offices, IBUSZ is one of the most recognized travel brands in Hungary. Classical tour operating services were the primary business activities of IBUSZ from its inception. This business is partly being carried out as an agent and partly as a tour operator. Beyond their wide network their travel packages are being offered by an additional 300 retailers.

- **CAR-Tour International:** Founded 15 years ago and specialises in tour organising. More than 350 retailers are offering their product portfolio.
- **Chemol Travel:** Partner of Radius Global Travel Management. Also active in corporate travel and incentive tourism.
- **OTP Travel:** Hungary's biggest bank and an insurance company are providing the travel agent with a stable financial background. Both in terms of volume and in terms of service complexity, OTP Travel are among the group of elite.
- **Tensi tours:** Tensi Tours was founded in 1983 as the first private travel agency in Hungary. Over the years it has gradually and systematically extended its range of activities, and has become a full service tour operator

Travel Agents

Corporate travel agents like Amex and Carlson Wagonlit are the most dominant sellers of airline tickets to Britain. Majority of their travel enquires are for business reasons, very often managed by global /corporate deals. There are two main volume providers: Vista (TQ3) and Aeroviva focusing on the most price sensitive segment of the market, thus being very important partner of airlines to sell seasonal offers and promotional products.

A big group of agents, often having multiple branches, offer a wide variety of travel services. One is the formerly state owned chain: IBUSZ, others are even franchise companies of international chains (Neckermann, BTI) or private companies.

For smaller agencies merging, streamlining their activity and specializing in a particular segment is the challenging way to remain in business.

Market Entry Strategies

Before your visit get the latest information on Hungary and to find out whether your product is suitable for the Hungarian market.

Ensure you understand the basics of Hungarian culture and business methods.

Make contact with Hungarian travel companies with offices in your country before planning a sales visit to Hungary.

Timing: the best times for sales visits are January-February and Sept-early Nov. Be clear with your marketing concept and business strategy for selling your product to the Hungarian market.

Introductions: things go more smoothly if an acquaintance of a Hungarian businessman or official arranges an introduction first.

Sales calls: cold calls are welcome.

Key contacts: find the key contact, usually at mid-management level. Initial interest: on your first visit your sales calls may not generate any business. Do not be misled by any apparent interest in your product. If the Hungarian are slow to respond to your proposals it could well be because of the internal search for a consensus. It could also be because they are testing your commitment.

Letter writing: e-mailing is common and the most efficient way of business communication. Response time, however, might be a bit longer.

Name cards: have lots. These are exchanged immediately upon meeting

Utazás Kiállítás, a Travel Expo of Budapest is the largest holiday fair for trade and consumers in Hungary. The show is held at the Hungexpo exhibition centre between the 16th and 19th of March. The first day of the exhibition is dedicated for the trade.

Netherland Trade & Business

Overview

The Dutch travel trade is made up of tour operators, coach operators and travel agencies. In addition, associations such as walking clubs or evening colleges will also organise holidays for their members through travel agents.

Tour operators: sell their product through their own or independent travel agencies. Increasingly, they also sell directly to the consumer through the internet.

Coach operators: usually sell their products (coach tours) through their own or independent travel agencies.

Travel agencies: usually sell products produced by tour or coach operators. Some travel agencies, however, also have a group department that organises holidays for associations.

Increasing numbers of retail trade operations in the Netherlands are reporting financial difficulties, partly due to the influence of the internet. This is likely to result in further consolidation and contraction in the industry, with the survivors being those who adapt to niche product opportunities and to a more service-oriented culture. Many of the larger tourism providers still get the vast majority of their bookings via the trade.

Tour Operators

The package holiday market is dominated by TUI and Thomas Cook. Between them they account for a third of all package holiday bookings. Giants though they may be in the Netherlands, major operators are relatively small fry. German conglomerates now own these companies. This type of consolidation has seen decreased flexibility on new programming and increased pressure on suppliers' prices.

Sea carriers like P&O Ferries, Stena Line and DFDS Seaways all produce good quality, inclusive brochures.

The main planning period for tour operators is Sept/Oct. The Dutch still start their holiday planning as early as Dec/Jan, so operators will have main-season programmes finalised in time for this period. In 2005 NL British Interest Group members see a significant trend towards later bookings. Customers are waiting for special offers and better weather before deciding on final main season destinations

Dutch operators will typically use a mix of direct contracting and working through ground handlers.

Among medium and smaller operators the trend has been to specialise to survive: to offer the kind of programmes which make little sense in volume terms to the major players.

These are normally small individually owned operations specialising in a variety of special interest holidays including cycling, walking, golf, sailing and garden tours to name a few. Try to avoid scheduling sales calls with operators in July or August.

Travel Agents

There are some 1,680 ANVR agencies in the Netherlands (those belonging to the Dutch Federation of Travel Agents). In addition, there are 500 Rabo bank outlets selling travel packages, accounting for 10% of overall packages. Retail agents with groups departments occasionally initiate special tours and excursions, usually in conjunction with a newspaper or an association.

Market Entry Strategies

Sales Calls

Timing: Avoid calls in July and August as people are generally on holiday. Also avoid the South on 6, 7, and 8 February (carnival celebrations). If you are visiting in the spring, remember to book accommodation in advance particularly for Amsterdam, as this is ‘bulb time’.

Office hours are generally 0900-1700, with only a brief pause for lunch, which is normally no more than a sandwich. Postpone business entertaining until you have developed personal relationships. Even then a quick lunch is likely to prove more acceptable – and hence more productive – than dinner. The Dutch value their private life.

Public Holidays:

Jan 1, April 14, 16, 17 & 29, May 5 & 25, June 4 & 5, Dec 25 & 26.

Transport: You are better off travelling by public transport than by car, especially in the Randstad area. Dutch driving is more aggressive. Motorways are frequently congested; parking is difficult (and expensive); wheel clamping is rife – particularly in Amsterdam – and break-ins are frequent, especially to foreign-registered cars.

Etiquette: Make appointments in advance – preferably by fax and if necessary with a follow-up phone call a few days later. Re-confirm verbal arrangements by e-mail, fax or letter. Announce your name and company when asking for people by phone. This is standard Dutch practice. Send potential business partners your sales documentation in advance, so that they can do their preparatory homework.

Be punctual. The Dutch tend to arrive early for appointments and will expect you to turn up on time. Try to get a message through if you are delayed. Get to the point. Your contacts will assume you want to do business and are much more likely to respond positively to a direct and forthright approach.

If your visit coincides with birthday celebrations, offer your congratulations. The Dutch place great emphasis on birthdays. Prove that you mean business by following up as soon as you get home. Finally, remember that loyalty pays. Remain faithful to your Dutch business partner and they will remain faithful to you.

Language/ culture/ currency: As the ability to communicate in English is a basic prerequisite for anyone working in the Dutch travel trade, it can be tempting to talk to businesspartners as if they were native speakers. Few are. Keep language straight forward and avoid ambiguity. Wherever possible, you should have your Dutch website and promotional literature translated into Dutch.

Reaching the Press: Advertising is expensive in the Netherlands, and there are a huge number of publications. The emergence of new media combined with a weak economy means print media is attracting reduced advertising and readership levels. The result is that fewer journalists are doing more work, so time is increasingly precious.

Attracting Dutch media to press launches and on press trips is increasingly difficult and, more than ever before, is only possible where supported by a strong, relevant and well considered media proposal.

The Dutch travel and features press is vital in reaching the independent visitor. Information, provided it is newsworthy, is acceptable in English. If you are mailing the press directly please send copies of your information so that consequent enquiries can be dealt with effectively. Excellent coverage has resulted from these. Help with facilities for visiting journalists is always appreciated.

Meet the Press: The Dutch Meet the Media workshop gives a strong PR message a prime opportunity to meet key media contacts one-to-one, once a year. This extremely well supported event attracts up to 80 journalists, who attend because of the high level of news worthy items they will encounter.

Norway Trade & Business

Overview

Norway's official travel trade body is the Norwegian Travel Trade Association which has a membership of 420 travel agents. There are around 1,100 tour operators and travel agencies in Norway. Most major operators are located in Oslo, Bergen, Trondheim and Stavanger. Special interest packages, eg football, language schools, golf, sport, culture, canal boats and self-catering

Tour Operators

There are approximately twenty large tour operators in Norway – mainly based in the cities of Oslo and Bergen.

General tour operators

The large tour operators who sell their products through agents all over the country. Programmes include travel to countries all over the world. Some large tour operators have departments specialising in special interest programmes, sports tours or cultural tours. They also have a business travel department.

Coach tour operators

Haga NorReiser is now the largest coach tour operator in Norway, with offices all over Norway. The main charter operator's offer coach tour options to their charter programmes.

Special interest operators

Norway has specialist agents operating in youth, sport, culture, seniors, self-catering and canal boat

Travel Agents

General travel trade agents selling the product of the large tour operators. They are in high street locations and cater for all kinds of travel, including business travel.

Market Entry Strategies

Exhibitions - Reiseliv (Oslo): This is Norway's main travel fair held in Oslo each year. It is seen as the gateway to the lucrative Norwegian market and is one of the most important places for meeting the travel trade and providing information to the public. The first day and a half are devoted to B2B and Press & PR. This is the place to meet major decision makers within the Norwegian travel trade and key contacts within Press and PR.

Sales Calls – Top Tips:

Before your visit get latest information on the Nordic region. Cold calling is not advised, so before arriving you must make appointments with the people you want to meet. However, please give advance warning. Make appointments one to two weeks in advance and reconfirm them a few days before.

The most important thing to remember is whether your product is going to be easy to sell and administer. The trade looks for volume and easy-to-sell products, hence the computerisation of the industry. Commission varies but is normally 7%-10%.

Send your brochure in advance. That way you will give the recipient time to digest the contents. The typical working day in the travel trade is approximately 0830 to 1800, with a lunch break of between 30 minutes to an hour. Long, liquid lunches are not the style.

In the summer, from mid-June to August, many people will be away on holiday, and others may leave the office as early as 1500. Also avoid arranging appointments on Friday afternoons.

Easter is a major holiday-taking time. Visits in the spring should also be carefully planned, as there are several public holidays in these months (see Public holidays below). Sales calls are necessary, particularly for hotels and handling agents who wish to make a mark, at least once a year and preferably twice if you are serious about the market. Once you make an appointment, try and stick to it and do not be late. Punctuality is expected.

Always respond to e-mails and faxes within 24 hours, even if it is just an acknowledgement (a quicker response is often expected to an e-mail).

Meetings should be used effectively. It is considered impolite not to be prepared. Try and use the first part of the meeting to find out as much as possible about your client's needs and those of their customers. Remember, listening can be as effective as talking.

Finally, follow up! Easily and all-too-often forgotten. After your visit, renew contact with both those you did see and those you were unable to see.

Public Holidays

New Years Day, 01 January	Constitution Day, 17 May
Palm Sunday, 9 April	Ascension Day, 25 May
Maundy Thursday, 13 April	Whit Sunday , 4 June
Good Friday, 14 April	Whit Monday, 5 June
Easter Sunday, 16 April	Constitution Day,
Easter Monday, 17 April	Christmas Day, 25 December
Public holiday, 01 May	Boxing Day, 26 December

Business Visits / Events

Business Visits Trends

The most important factors Nordic buyers take into account when choosing a destination are quality of accommodation, total cost, easy access, safety and attraction / excitement of the venue.

The Norwegian manufacturing and consulting sectors in particular arrange events overseas and these are mainly training, meetings and incentives.

There are two broad types of Nordic meetings and incentive buyers;

The Affluent Buyer

Always uses an intermediary agent (independent consultants, travel agents and meeting bookers). Budgets per delegate range from an absolute minimum of £390. The average is currently between £615 and £925. More exclusive groups generally have budgets of between £1385 and £1540 per delegate. This type of buyer needs to be inspired to choose Britain against our direct competitors (Spain, France, Italy, Germany and long haul).

The 'DIY' Buyer

Prepared to put together their own conferences or events and are nearly always on a very restricted budget. They will use budget airlines and accept three star accommodations. Intermediaries are often by-passed as they feel they can get the best deals direct or on the Internet. Information gathering is done via the internet and through frequent calls to Visit Britain. This type of buyer rarely has a budget over £460 per delegate.

For this type of buyer, Britain is in competition with the domestic Norwegian market, other Nordic / Baltic destinations and Eastern Europe. One thing the above have in common is that they both crave value for money. Overseas group travel includes both conferences and incentives. However, incentive participants are subject to heavy taxation so trips are often disguised as a conference or have some token meeting element within the incentive.

Nordic people view the experience as very important. They want to engage in a wide range of activities and the level of accommodation is often sacrificed for this. Activity conferences or incentives, where participants must be involved in physical adventure activities, are very popular especially for groups aged under 40. Experiences and a positive atmosphere are very important as a break from the routine environment. This aspect is likely to become even more essential as desk bound IT jobs increase. One thing for certain is that all content needs to be clearly specified in proposals.

A strong rationale is always required for the meeting to take place. Companies are becoming more aware that travel generally and particularly meetings and incentives should be effective and worthwhile and are therefore trying to cut out meetings which do not communicate the right message. Conferences are therefore being organised more professionally according to set objectives and are often evaluated following the event.

Poland Trade & Business

Overview

The tourism market in Poland is currently in the process of very significant development and transformation from a market of marginal importance into one of the leading markets.

Until 1990, there were only a few Polish tour operators and travel agents, all of them state-owned. In 1991 to 1995, there was an explosion in the establishment of small (below 5 employees), private travel agencies. The market situation changed dramatically in 1996 when large, foreign wholesalers of tours, including Neckermann of Germany, TUI of Germany and Scan Holidays (internationally owned) began opening offices in Poland.

Currently, there are approximately three thousand companies in the tourism sector, registered by the Ministry of Economy, Labour and Social Policy. The majority of Polish travel offices are rather small companies with up to five employees. Only about 650 companies employ more than five people.

Only seven Polish tour operators and travel agencies had revenues approximately 25 million PLN (£4 million) and three had revenues in the range of 10-20 million PLN (£1.5-3 million). These Ten Polish Companies are able to compete with large Western European firms. However, none of them is expected to be able to compete in equal terms with large German and Scandinavian companies that serve larger numbers of clients than the total of outbound Polish tourism. The remainder of companies in the market is expected to become travel agents representing large touroperators. Small travel companies are also expected to concentrate on specialized trips such as sailing tours, language travel courses, horsebackriding trips and custom-made trips.

The Polish chamber of Tourism was founded in 1990, and is a member of the United Federation of Travel Agency Associations (UFTAA). The chamber represents travel agencies and tour operators with established offices in Poland. Nearly 400 major travel offices are affiliated to the Polish Chamber of Tourism.

Tour Operators

There are approximately 600 tour operators, both incoming and outgoing in the Polish market. Tour operators and tour agents must be holders of special licences. Standard requirements for establishing and running a travel business are stipulated in the new bill on tourist services, valid from August 1997. The majority of tour operators are rather small companies with up to five employees and operate in the incoming sector. In fact only about 200 tour operators are able to prepare their own catalogues and Internet sites.

Poland's largest tour operator PBP Orbis Travel has maintained the leading position on the tour operators market, mainly thanks to the fact that its domestic operations are increasingly significant. The next largest are foreign wholesalers of tours: Scan Holiday, TUI Polska, Neckerman Polska, My Travel and Ecco Holiday. Some Polish Operators such as Triada, Itaka, Sindbad and Sigma Travel, have a secure position on the market, but they have had to significantly lower their margins.

Today approximately 30 Polish tour operators. The majority of them are:

- **PBP ORBIS:** offering groups and individuals, hotels, coaches, flight tickets, incentives, conferences and special interest programmes
- **TRIADA:** offering groups and individuals, coaches and flight travels and transport
- **ITAKA:** tour operator and coach company, offering groups and individuals and providing a full service
- **ATAS:** innovative tour operator for language holidays and language schools, language courses for youths and adults and accommodation in hotels, youth residences or with host families
- **STA Travel:** travel offices offering flight and bus tickets and accommodation for group and individuals (franchised to STA TravelGroup)
- **Almatur:** offering full service programmes for groups and individuals, hotels and transport

Travel Agents

There are approximately 3,000 agencies in Poland. The majority is either franchises of, or wholly owned by, the major chains. The remainders are privately owned. The trend is for the smaller, privately owned agencies either to become franchises of the major chains, or to be bought by the chains as wholly owned agencies.

While the larger agencies are doing well, they recognise at the same time the need for massive investment in technology to remain in business. The smaller companies are finding that margins are under pressure and that they can no longer run the operation as a family business.

Most agencies are computerised. Internet and booking system technologies are being actively used by most of them. Poles have a good technical education and are not afraid of new systems, but smaller agents often still work with faxes and paper.

Market Entry Strategies

Sales Calls

Currency: the official currency in Poland is the Zloty (PLN), which is divided into 100 Groszy. Current average exchange rates of foreign currencies in Zlotys you can find on the website: www.nbp.pl

Money exchange: in Poland you can change money either at a bank or at currency exchange offices, labelled “Kantor”. You can find them at the airports, railway stations, at the most hotels and shopping areas. At almost all cash machines you can withdraw money.

Credit cards: Visa, American Express, Diner’s Club and Master Cards are accepted in most hotels, restaurants and shops.

Banks: are generally open from 9 am to 5-6 pm. for individuals and to 2p.m. for companies. No bank is open during the weekend. Private exchange offices open at 8 am and close at 6 or 7 pm. They are often open on Saturdays and Sundays.

Shops: open at 10 am and close at 6-7 pm, with the exception of foodstores, which usually open early in the morning; in most large and medium-sized cities there are delicatessen stores open around the clock. Shops usually close early (between 1 pm. and 4 pm.) on Sundays.

Rent a car: some of Europe’s largest rent a car companies and Polish rent a car companies have their offices in the arrival halls of Polish airports, as well as in some hotels.

Public Transport: Use public transport in the main cities. The metro, trams and buses in Warsaw and other big cities are quick, reliable and good value. Remember to buy your tickets at your hotel, a newspaper kiosk or at the metro station. During the night tickets can be bought at the driver of a tram or bus. Use the express trains for travel within Poland – they are good and cheap.

Taxis: can be expensive, especially from the airport and hotels. You can ask about the price. A good radio cab service operates in Warsaw on telephone number 919. They accept payment by credit card, but you will need to let them know in advance.

Electricity: 230 volts. An adapter plug for appliances is required.

Phone: public phones require phone cards. Phone cards (of different values) are available at post offices and local kiosks. International dialing code: +48 followed by city code. The Polish mobile phone network is well developed.

Emergency numbers: Ambulance 999, Fire-brigade 998, Police 997. Make your appointments well in advance with a follow-up telephone call on arrival. Avoid business visits in July and August (holiday time in Poland).

Institutions and government agencies work five days a week, from 8:15 am to 4:15 pm. Industrial plant administrations and offices are open from 7 am to 3 pm. All offices are closed during official holidays. Poles are generally fairly formal and punctual. It is usual

to shake hands on greeting and it is still quite common for ladies to have their hands kissed.

Dress conservatively: formal dress and suits for business and social functions. English is best known in Warsaw and by the younger generation, whereas amongst older people and in western Poland, German and French predominate.

Russia Trade & Business

Overview

In Russia there is not always a clear division between tour operators and agents. Larger agents who would normally be competitors divide the responsibility of travel organisation: one books the hotels, another organises visas and another deals with the ticketing. This pooling system is often based on old friendships from the previous Intourist structure, it can also be considered as a clever way of cornering the market and deterring competition.

This structure has evolved due to a lack of trust between people in the industry, especially the middlemen. However, with time, this is becoming less and less profitable as Russian tourists are no longer willing to pay for the inefficiencies of a small agency dealing directly with the supplier. As a result, more consolidation is likely to take place, but pooling will continue to function until it is no longer feasible.

Many agents are keen to deal with hotels and attractions directly on the assumption that it is cheaper. More experienced agents prefer to work through a well-established, competitive ground handler.

In 1994, the State Committee of the Russian Federation for Physical Culture and Tourism, was charged with issuing licences to travel agents involved with international tourism. By March 1995, nearly 2,000 travel agencies had been issued with licences. Registered agencies have the possibility to join RATA, the Russian Association of Travel Agents. The more successful agents tend to be members.

Tour Operators

Most tour operators are based in Moscow and St Petersburg.

There are around 20 leading tour operators. As a rule, they are larger companies with 60-100 employees with an annual turnover ranging from \$15-20 million to \$120 million. As a distribution channel they use an agent network, nevertheless, direct sales can make up to 50 % of the sales.

Many tour operators specialise in single destination sales. They are middle size or small companies (6-20 employees), with a turnover of \$250,000/year. These operators might be well-known and respected among a number of travel agents, and pool together with tour operators concentrating on other destinations to force a company's image as a multi-destination tour operator. As a rule, these small tour operators mainly deal with F.I.T. travel.

Travel Agents

Agencies are spread across Russia, but in the regions the quantity of agencies in a large city may be limited to less than 100 agents. While in Moscow there are estimated to be 4217, in Saint Petersburg there are only 327 companies holding travel agent licences.

The present trend is for small agencies and regional tour operators to work through a variety of tour operators in Moscow, especially for business and long haul destinations.

Travel agent brands are a novelty for the Russian market. There are some major ones that recently appeared on the market such as: "Kuda.ru", "Last-minutes offers", "RFR Group", "Seven Skakunov", "Green.Ex" and "Mashina vremeni".

Market Entry Strategies

Sales Calls

All visitors require a visa. Do allow yourself a sufficient time to apply for your visa. A change in the law in January 1997 stipulated that business visas from private companies now have to pass through the Ministry of Foreign Affairs and this takes around 10 days on the Russian side. To qualify for a tourist visa you need to show the reference number for your hotel reservation. You should allow at least 7 days after submitting it to the embassy to receive the cheapest visa. Express visas can be organised in less time but you pay for the privilege.

You may find it easier to ask agents to meet you at your hotel rather than trying to find their offices on your first visit. Credit cards are widely accepted in capital cities, at the larger hotels and good restaurants.

Make appointments before you arrive, by fax or e-mail, follow this up with a brief call on your arrival, make sure you can get clear information about where the office is situated, you may need this whether you go by metro or taxi.

The metro system in both Moscow and St. Petersburg is very comprehensive and cheap, avoid it during the morning rush hour though. The best transportation option in Moscow is to hire a driver for the day to take you to all your appointments. This might be rather expensive from the hotel so ask one of your potential partners if they can assist you in finding a driver. Set the price at the beginning of the day. If you decide to take a taxi, order it from inside the hotel rather than picking up one of the drivers waiting at the entrance of the hotel.

If you wish a Russian to consider you as a serious business partner, do dress smartly (an elegant tie or scarf can often do the trick). Do bring posters, brochures and any other publicity material and any other publicity material with you.

Do try to arrive on time for appointments. Give yourself sufficient time to seek out the office; their numbering system in Russia is sometimes quite complicated with different entrances and additional buildings all going under the same number. Do ask for exact instructions on how to find the office before you take off. Work doesn't usually start until 10.00 but may go on until quite late in the evening.

Be flexible about the date of the payments; there are still problems with transferring money abroad. However do make sure you get the prepayment up to five days before the visitors arrive

Do expect to negotiate about prices. Do not put all cards on the table at the beginning but keep your final offer until later on in the meeting.

Tourism is a new industry in Russia and many of the people working in the industry have no prior experience. However they are usually able to learn quite quickly.

Provide information in Russian where ever possible, even if you just translate a flyer which sits inside your brochure, it will be appreciated. Knowledge of English amongst agents ranges from excellent to non existent but there is nearly always somebody in the office who can speak English.

Sweden Trade & Business

Overview

Sweden's official travel trade association (RTS) was founded in 1992 and has a membership of some 500 travel-related companies. Most of these companies have branch offices so the real membership is approximately 1,500 offices. The most striking feature of the Swedish travel industry lies in its concentration; the business and leisure sectors are both dominated by a few very large interests. The independents are also often members of alliances.

Main types of Britain Packages sold through the travel trade

- London air packages offering flight and hotel accommodation
- Special interest packages, e.g. golf, language schools, culture, selfcatering,group sports visits (football)
- England/Scotland/Wales coach tours
- Fly-drive tours including air travel and rental car. Accommodationvouchers might also be included.

Tour Operators

Many larger operators have worldwide or Europe-wide brochuresincorporating Britain programmes (heavily skewed towards London citybreaks). We are witnessing fewer operators with distinct UK programmes– suggesting that many consumers are now arranging their own weekendbreaks to Britain online or direct with airlines.

Coach tour operators

The coach market is strongest in southwest Sweden because of its closeproximity to continental Europe. The market shows signs of growth forboth domestic and international traffic.

Special interest operators

Sweden has specialist agents operating in youth, sports, culture, seniors,self-catering and canal boat holidays. With a few exceptions, mostnotably the youth-market, they tend to be small, privately-run businessesserving niche markets.

Travel Agents

Most retailers come into contact with Britain only through the sales ofSwedish tour operator packages. Very few will seek a direct contact with aBritish supplier to serve their clients, as they will always be looking for theeasiest and quickest way to sell a product. Approaching retail agents istancefore not usually advisable.

Market Entry Strategies

Exhibitions

TUR, Gothenburg: The first two days of TUR (see description above) are reserved exclusively for the travel trade. The exhibition utilises a pre-appointment booking scheme and in 2005 there were 2500 pre-booked trade appointments between exhibitors and buyers.

Sales Calls – Top Tips

Speak to VisitBritain in London before your visit for the latest information on the Nordic region.

VisitBritain has offices in Copenhagen, Oslo and Stockholm (which also takes care of Finland).

Include VisitBritain's Nordic offices on your next sales visit or at least let them know you are coming.

Cold calling is not advised, so before arriving you must make appointments with the people you want to meet. VisitBritain cannot make appointments for you, but we can provide a list of trade contacts and give you advice on whom to call. However, please give advance warning. Make appointments one to two weeks in advance and reconfirm them a few days before.

The most important thing to remember is whether your product is going to be easy to sell and administer. The trade looks for volume and easy-to-sell products, hence the computerisation of the industry. Commission varies but is normally 7%-10%.

Send your brochure in advance. That way you will give the recipient time to digest the contents.

The typical working day in the travel trade is approximately 0830 to 1800, with a lunch break of between 30 minutes to an hour. Long, liquid lunches are not the style.

In the summer, from mid-June to August, many people will be away on holiday, and others may leave the office as early as 1500. Also try to avoid arranging appointments on Friday afternoons.

Easter is a major holiday-taking time. Visits in the spring should also be carefully planned, as there are several public holidays in these months (see Public holidays).

Sales calls are necessary, particularly for hotels and handling agents who wish to make a mark, at least once a year and preferably twice if you are serious about the market. Once you make an appointment, try and stick to it and do not be late. Punctuality is expected.

Always respond to e-mails and faxes within 24 hours, even if it is just an acknowledgement (a quicker response is often expected to an e-mail)

Meetings should be used effectively. It is considered impolite not to be prepared. Try and use the first part of the meeting to find out as much as possible about your client's needs and those of their customers.

Remember, listening can be as effective as talking.

Finally, follow up! Easily and all-too-often forgotten. After your visit, renew contact with both those you did see and those you were unable to see. And please keep VisitBritain informed of the results of your visit –both good and bad.

Reaching the Swedish Travel Trade

Public Holidays 2006

Jan 1 2006	New Year's Day.	5-Jun	Whit Monday.
5-Jan	Eve of Epiphany.	23-Jun	Midsummer's Eve.
6-Jan	Epiphany.	24-Jun	Midsummer Holiday.
13-Apr	Maundy Thursday.	3-Nov	All Saint's Eve.
14-Apr	Good Friday.	4-Nov	All Saints' Day.
17-Apr	Easter Monday.	24-Dec	Christmas Eve.
30-Apr	Valborg's Eve.	25-Dec	Christmas Day.
1-May	Labour Day.	26-Dec	Boxing Day.
25-May	Ascension.		

Business Visits / Events

Business Visits Trends

SHIE is the major MICE fair in Stockholm (January). For more information see: www.shie.se

The most important factors Nordic buyers take into account when choosing a destination are quality of accommodation, total cost, easy access, safety and attraction / excitement of the venue.

The manufacturing and consulting sectors in particular arrange events overseas and these are mainly training, meetings and incentives.

There are two broad types of Nordic meetings and incentive buyers;

The Affluent Buyer

Always uses an intermediary agent (independent consultants, travel agents and meeting bookers). Budgets per delegate range from an absolute minimum of £390. The average is currently between £615 and £925. More exclusive groups generally have budgets of between £1385 and £1540 per delegate. This type of buyer needs to be inspired to choose Britain against our direct competitors (Spain, France, Italy, Germany and long haul)

The ‘DIY’ Buyer

Prepared to put together their own conferences or events and are nearly always on a very restricted budget. They will use budget airlines and accept three star accommodations. Intermediaries are often by-passed as they feel they can get the best deals direct or on the Internet. Information gathering is done via the Internet and through frequent calls to Visit Britain. This type of buyer rarely has a budget over £460 per delegate.

For this type of buyer, Britain is in competition with the domestic Swedish market, other Nordic / Baltic destinations and Eastern Europe.

One thing the above have in common is that they both crave value for money. Overseas group travel includes both conferences and incentives. However, incentive participants are subject to heavy taxation so trips are often disguised as a conference or have some token meeting element within the incentive.

Nordic people view the experience as very important. They want to engage in a wide range of activities and the level of accommodation is often sacrificed for this. Activity conferences or incentives, where participants must be involved in physical adventure activities, are very popular especially for groups aged under 40. Experiences and a positive atmosphere are very important as a break from the routine environment. This aspect is likely to become even more essential as desk bound IT jobs increase. One thing for certain is that all content needs to be clearly specified in proposals.

A strong rationale is always required for the meeting to take place. Companies are becoming more aware that travel generally and particularly meetings and incentives should be effective and worthwhile and are therefore trying to cut out meetings which do not communicate the right message. Conferences are therefore being organised more professionally according to set objectives and are often evaluated following the event.

Switzerland Trade & Business

Overview

There are over 500 tour operators and approximately 2,000 retail agents in Switzerland. The tour operator market has undergone the same kind of shake-up as was experienced in other European countries during the second half of the 1980s and 1990s and there has been a wave of concentration among tour operators. Although a number of small specialist operators have been successful in their specific niche markets, the large generalist operators have increased market share at the expense of small and medium-sized players.

According to the Swiss national travel agents' association (SRV), the top 10 tour operators in Switzerland probably account for 70% of the total market. Most of the leading groups are both tour operators and travel agents and it is difficult to distinguish between their operations.

Given the relatively small size of the Swiss market, it is perhaps surprising that Swiss tour operators themselves have not been prey to more foreign takeovers. Germany's TUI has now entered the market, merging with Imholz and Vögele to form the TUI Suisse Ltd, the third largest operator after Kuoni and Hotelplan. However, on the whole, Switzerland is the reserve of Swiss companies, and this is the exception to the general rule.

Tour Operators

There are about 60 tour operators in Switzerland who together cover all aspects of travel. The bigger generalist operators concentrate on city stays, fly-drive or coach tours, leaving the smaller companies to cover the more specialist end of the market.

Ground handlers and direct contracting are both wide spread, often as parallel practice within the same operator in order to get exactly what their clients are looking for, at the value-for-money price.

Travel Agencies

There are approximately 2,264 travel agencies in Switzerland, the majority of which only sell operators programmes and concentrate on products from the major operators. Some also arrange ad-hoc group travel.

Representatives: There are few GSA or Sales Representation covering only Switzerland. The country is small enough to adopt a face-to-face approach directly and this is appreciated. Otherwise a number of GSAs based in Germany tend to offer a service covering Germany, Austria and Switzerland (at least the German-speaking part thereof).

Market Entry Strategies

Before your visit, get the the latest information on Switzerland. Obtain a copy of our Travel Trade Directory for Switzerland. If you do decide to visit Switzerland it is essential to make appointments. An introductory letter or fax is essential (not necessarily in German/French/Italian) with relevant background information.

It is important to consider the timing of your visit. The large tour operators research their main season programmes between April and June. Some may visit during this time to contract accommodation and visit new attractions/regions/products to be included. These programmes are costed between July and September and launched in November/December. The smaller specialist operators tend to research their programmes slightly later, July/September for a launch in January/February. Off-season/city-break operators research their winter programmes in March/April, for launching in July/August.

Check to ensure that your trip does not coincide with a public holiday. As is the case, many people choose to take a long weekend around these dates, especially in the spring and summer. Provide the operators you are visiting with a comprehensive information pack (preferably in German/French/Italian) about your product. On your return to ensure that you follow up quickly and renew contact regularly.

Business Visits / Events

Current Business Tourism Trends

There is clearly a lot of individual business travel going on between the two countries and generally the number of corporate meetings and incentives out of Switzerland has been rising over the last few years. The majority of companies organising trips are based in the German speaking part of Switzerland or the “Golden Triangle” of Zurich, Basle and Olten, where many of Switzerland’s largest companies have their headquarters. An estimated 80% of companies organizing overseas trips have a head office or subsidiary in the UK and corporate travel is mainly to destinations that have links to their own company.

Visits to trade fairs by Swiss companies are particularly popular. The average group size is small at 3 – 5 people and they are usually at managing director level. Most trade fair visits are conducted in the Spring and last an average of 2.5 days with those shows in the construction or hospitality industries attracting the most visits (construction remains an important industry sector in Switzerland). Accommodation is in 4 star hotels and they don’t tend to combine any leisure activities with the visit. Anything between £380 and £980 per person is spent on the trip.

Current Business Tourism Trends

In a recent research project, incentive travel did not feature widely. However, the report did establish that incentive trips are taken in companies with 50 or more employees. Some 75% of companies organising incentives have a head office or subsidiary in the destination country, implying that programmes are not 100% motivational or leisure-led and would include some sort of meeting element. Preferred time of travel is split between

Spring and Autumn with average length of stay at 3.3 days. Accommodation is usually in three star hotels and leisure elements would include culture, sightseeing and gastronomy.

UK and Competitor Destinations

As mentioned above, travel is mainly to destinations which have links with the company and the most popular destinations for corporate trips are Germany, France, Italy, USA and the UK, in that order. This clearly reflects trading and business patterns and probably includes a lot of individual business travel, however, sunny climates and exotic destinations are much favoured for genuine incentive travel.

In terms of visits to Britain, it is the French and German speaking parts of Switzerland that visit the most and particularly the finance, transport and communications sector. London is the top destination within the UK followed by Scotland.

Trade Structure

We know that there are some very large business travel agencies and professional conference organisers based in Switzerland, as well as many agencies and operators offering both leisure and business services. Two thirds of the MICE trade are based in the German speaking part of Switzerland and one third in the French part, which represents far better regional spread than the consumer trade.

Despite this, out of the companies interviewed in our survey, 69% said that they organise their corporate trips internally with only 31% using a travel agency. Again this could be a reflection of the high volume of individual business trips undertaken by corporates, which are easy to organise internally.

The Association Sector

Given Switzerland's longstanding neutrality it has always been home to a plethora of international organisations and similarly hosts a number of headquarters of large international associations, particularly in the medical and pharmaceutical fields. As mentioned in the opening section of this report, it is rare that association headquarters alone decide a future congress destination. However, many suppliers feel it is worthwhile building up relationships with the people at the top as they hold a lot of influence and may recommend products or destinations to a committee or may ask a particular national chapter to submit a future bid.

In view of this, Switzerland is also home to some of the big professional conference organisers (PCOs), some of whom have been appointed as core PCO to key associations meaning that they are involved with the organisation of all future congresses regardless of destination. Many suppliers are therefore keen to meet with these PCOs as well because they may be sources of future business should a congress go to that supplier's destination.

Lists of associations based in Switzerland can be obtained from a number of sources, particularly the International Congress and Convention Association (ICCA). Details of

Professional Conference Organisers, particularly those with core PCO status, are harder to get hold of and are often closely guarded. VisitBritain does not have a list at present but the International Association of Professional Conference Organisers (IAPCO) would be a good first point of call.

France Trade & Business

Overview

The French travel trade is made up of tour operators, coach operators, and travel agencies. In addition, associations such as walking clubs or evening colleges will also organise holidays for their members, as will the Comités d'Entreprises (every company with 50 or more employees must give 3% of turnover to this "social club", which then organizes staff trips).

Tour operators: sell their product through their own or independent travel agencies. Increasingly, they also sell directly to the consumer through the internet.

Coach operators: usually sell their products (coach tours) through their own or independent travel agencies.

Travel agencies: usually sell products produced by tour or coach operators. Some travel agencies, however, also have a group department that organises holidays for associations.

Tour Operators

In 2001, there were about 250 tour operators in France. There are four types of French tour operator:

1. 'Généralistes' – top national tour operators who produce one or more large brochures (e.g. Nouvelles Frontières). Britain as a destination is included in these. However, a separate brochure on Britain is produced in some cases. These packages are sold through their own network of travel agencies, as well as through independent travel agencies. Clientele: mostly individuals although the larger operators will have a groups department.

2. 'Spécialistes' – smaller operators who specialise in specific destinations or in specific activities. Most carriers, whether air or sea, have their own tours. They sell directly as well as through some independent and networked travel agencies. Clientele: mostly individuals.

3. Coach operators – there are about 2,500 coach operators in France, 400 of which are registered through SNET (Syndicat National des Entreprises de Tourisme). Approximately 350 sell Britain to various degrees. Clientele: groups (à la carte or with pre-determined dates and departures).

4. Associations – they sell to their own club members or defined market segments (e.g. comités d'entreprise, school groups, groups with a cultural interest). Clientele: groups only.

5. Agency networks: sell their own products as well as others e.g. Thomas Cook (ex. Havas), Carlson Wagonlit. Clientele: mostly individuals.

Tour operators prepare their spring/summer brochures in November/December and their autumn/winter brochures in June/July (to be out for TOP RESA – a major travel trade exhibition usually in September each year).

Travel Agents

General information about travel agents – commission structure etc. Their primary aim is to sell transport and packages set up by tour operators. In 2000 there were about 5,000 points of sale in France, of which approximately 250 were tour operators. 1,600 licensed agencies (3,100 points of sale) are members of SNAV (Syndicat National des Agences de Voyages) with nearly 40% of the agencies concentrated in the Paris area. Otherwise bookings are made by the client themselves direct with the accommodation provider and carrier.

Hypermarkets: These travel agency outlets in supermarkets have proliferated over the last few years. They sell through dedicated Internet sites and/or callcentres. Some examples: Leclerc Voyages (travel agent with 117 outlets); Vacances Carrefour: (travel agent with 87 outlets); Auchan Voyages: (call centre and website only) Casino Group: phone-sales-only points for the group's brands (Géant Vacances, Leader Price Voyages, Monoprix Voyages, Mousquetaires). All the above are members of SNAV. The tendency has been for them to offer time-restrictive but very attractively priced offers to supermarket clientèle.

Market Entry Strategies

Guide Books

The most popular guidebooks in France are Guide Routard, Michelin, Guide Hachette.

Consumer Exhibitions

Only 15% of French people travel overseas for a holiday, and so reaching this target group is crucial. Exit surveys from the largest consumer holiday exhibition Salon Mondiale de Tourisme, show that 90% of visitors to French travel exhibitions go on to take an overseas holiday, and that they are heavily influenced by the information they gather there.

Sales Calls

Timing: July and August are quiet months for travel agents. However, the contacts you wish to see may well be on holiday! Tour operators prepare their spring/summer brochures in December/January and their autumn/winter brochures in June/July.

Public holidays

Fixed Public Holidays in France	
1 January	New Year's Day
1 May	Labour Day
8 May	Fête de la Victoire 1945 (WWII Victory Day)
14 July	Bastille Day (Fête nationale)
15 August	Assumption of the Blessed Virgin Mary(Assomption)
1 November	All Saints Day (La Toussaint)
11 November	Armistice Day (Jour d'armistice)
25 December	Christmas Day (Noël)
26 December	2nd Day of Christmas (in Alsace & Lorraine-only)

Moveable Public Holidays in France	
Good Friday*	14 April
Easter (Pâques)	16 April
Easter Monday	17 April
Ascension (l'Ascension)	25 May
Whit Sunday (la Pentecôte)	4 June
Whit Monday	5 June

Note that holidays falling at the weekend are not moved. Note that when a holiday falls on a Tuesday or Thursday, many French people may take the respective Monday or Friday off as well. This is not official and does not apply to institutions such as banks or government, but can cause difficulties doing business on occasions.

Transport: Allow plenty of time between appointments, especially in Paris and Ilede France. Remember to ask for the nearest Metro station – this will help you to locate the address more easily and avoid traffic jams.

Transport in Paris: the underground system is very good and easy to use. You can get a daily pass but make sure you buy one that covers the zones you are planning to visit. Taxis are easily found everywhere (average cost for a ride in the centre of Paris is 20 Euros, much higher if you go out to the suburbs). From Roissy airport, you can use the Roissybus, which will drop you behind the Opera, or the RER – suburban express to Auber – both in the heart of Paris.

Etiquette: Make an appointment well in advance and reconfirm a few days before. Never turn up without an appointment. Be punctual in case your contact has a tight schedule but be prepared to wait at least 15 minutes. Personal relationships are very important to the French and take time to build. Be patient. Give your contact the impression he/she is getting special attention. Make sure you follow up on your visits. Your future business depends on that as much as on the visit itself. If you are asked for a quote, send it straight away.

Do not be offended by direct talk (e.g. ‘the food is disgusting’, ‘hotels are outrageously expensive’ ...). Just be prepared for it! Likewise, do not be taken aback if (when!) you are constantly interrupted while talking – it means you generate interest!

Language/currency: Use your French or come along with someone who speaks French. It is likely that your contact will be happy to speak English with you, after you have made an effort in French. It is highly recommended that you have brochures in French or at least a fact sheet presenting your product. Remember to quote your prices either directly in Euros or in £ with current Euro equivalent.

Greece Trade & Business

Overview

The Greek travel trade is made up of a plethora of large to small sized travel agencies. There are no tour operators in Greece adhering to the strict profile of a tour operator. In addition, associations such as senior citizen groups will also organise holidays for their members.

Tour Operators

Mostly travel agents sell their product through their own or independent travel agencies. They still do not sell directly to the consumer through the internet.

Travel agencies usually sell products produced by a larger travel agency or specialise in one market and produce their own programme. Coach operators are usually owned by a large travel agent and their products (coach tours) are sold at the same time as the rest of their excursion programme through their own or independent travel agencies.

Travel Agents

There are about 8,000 travel agents in Greece. 1,500 licensed agencies are members of HATTA (Hellenic Association of Travel Agents). There are 22 PCO's in Greece that belong to HAPCO (Hellenic Association of Professional Congress Organisers).

There are 3 types of Greek travel agents:

1. General - top national travel agents who produce one or more large brochures (e.g. Ginis Vacances). However they usually feature separate packages which are affordable. Their packages are often sold through some independent and networked travel agencies but not actively advertised. Clientele: mostly individuals although the larger operators will have a groups department.

2. Specialised - smaller travel agents who are very well known to specialise in specific destinations or in specific activities (e.g. Monogram Travel). They sell directly. Clientele: mostly individuals.

3. Agency networks: sell their own products as well as others e.g. Travel Plan, Carlson Wagonlit. Clientele: mostly individuals.

Tour operators prepare their spring/summer brochures before Easter and their autumn/winter brochures in August/September.

Market Entry Strategies

Sales Calls

Timing: July and August are quiet months for travel agents. However, the contacts you wish to see may well be on holiday! Tour operators prepare their spring/summer brochures before the Orthodox Easter usually April/May and their autumn/winter brochures in September/October.

Public holidays 2006: January 1, January 6, March 6, March 25, April 21, April 23, April 24, May 1, June 12, August 15, October 28, December 25, December 26.

Transport: Allow plenty of time between appointments, especially in Athens. Remember to ask for the nearest Metro station - this will help you to locate the address more easily and avoid traffic jams.

Transport in Athens: the underground system is very good and easy to use. You can get a daily pass. Taxis are easily found everywhere (average cost for a ride in the centre of Athens is 5 Euros, much higher if you go out to the suburbs). From El. Venizelos airport, you can use the Metro which connects with central locations in Athens town, or the Proastiakos - city rail which will drop you off at Stathmos Larisis - the central train station in the heart of Athens.

Etiquette: Make an appointment in advance and reconfirm a few days before. Never turn up without an appointment. Be punctual in case your contact has a tight schedule but be prepared to wait at least 15/30 minutes.

Personal relationships are very important to the Greeks and take time to build. Be patient. Give your contact the impression he/she is getting special attention. Make sure you follow up on your visits. Your future business depends on that as much as on the visit itself. If you are asked for a quote, send it straight away. Do not be offended by direct talk (e.g. 'the food is disgusting', 'hotels are outrageously expensive'...). Just be prepared for it! Likewise, do not be taken aback if (when!) you are constantly interrupted while talking - it means you generate interest!

Language/ currency: Key contacts will speak English even if they are not fluent in it and they will be happy to speak English with you. It is highly recommended that you have a fact sheet presenting your product in Greek if possible. Remember to quote your prices either directly in Euros or in £ with current Euro equivalent.

Ireland Trade & Business

Overview

The travel trade is going through a revolution as a result of how people book their travel needs. More and more people are booking their travel online. Indeed, many travel agents have lost their business to the Internet, especially to airline websites. City break tour operators have reported that sales are down considerably.

Tour Operators

The traditional division between travel agency and tour operator is not distinct in Ireland. Tour operators are under increasing pressure as Aer Lingus is following Ryanair's lead in pulling out of any fare deals they may have had with the trade and directing all traffic to their own website.

Ferry Operators: Stena Line, Irish Ferries and Swansea Cork Ferries sell the product. The ferry companies have come under increasing pressure from low cost carriers but tend to focus on holiday parks, shopping breaks (by car) and packages to Britain's major theme parks.

Online: ebookers are the largest online holiday provider in Ireland. They are being joined by Lastminute.com, which has a wealth of excellent British product.

Travel agencies usually sell products produced by tour or coach operators. Some travel agencies, however, tailor make their own packages for clients. Many travel agents in Ireland are small and independently owned, this however is changing. The main multiples are First Choice Travel Shops and Budget Travel, they tend to focus on selling their own sun packages. Other Travel Agent alliances include Worldchoice. Many travel agents are members of the Irish Travel Agent's Association (ITAA), the Irish equivalent of ABTA.

Travel Agents

Within Ireland, there are 370 travel agencies and 22 tour operators who are members of the Irish Travel Agents Association and approximately 100 that operate outside the Association. The majority of agencies are family-owned and operated. There is a growing trend towards the development of retail chains and franchises such as Worldchoice. The advance in technology within travel agencies has been moving at a fairly rapid pace. However, it is only recently that travel agent and tour operator Internet sites have begun to emerge. A number of the larger travel agents do package products independently of the operators. This is common in business as many agents are aware of the product available and will approach the product directly.

Market Entry Strategies

Timing: Like many countries, Monday mornings and Friday afternoons are not the best times for business and Bank Holidays should be avoided. If you keep to the normal business hours, you can be assured of a warm welcome. Banking hours are 1000–1600 with some opening on a Saturday morning.

Public Holidays: There are nine public holidays in Ireland each year. Good Friday is not a public holiday. The list of public holidays in Ireland each year is as follows:

New Year's Day (1st January)
St. Patrick's Day (17th March)
Easter Monday
First Monday in May, June, August
Last Monday in October
Christmas Day (25th December)
St. Stephen's Day (26th December)

Transport: Some of the city centre agencies in Dublin are not interested in handling business to third party, as they regard it as low value and difficult to book. It is therefore useful to have a hire car to visit agencies in the Dublin suburbs, County Dublin and the rest of Ireland.

Trains link most major Irish cities and towns. On occasion it is sometimes worth looking at domestic flights with Aer Arann as the road network is not always as sophisticated in the regions as it is the greater Dublin area. Aer Arann operates flights from Dublin to Cork, Galway, Kerry, Knock, Sligo and Donegal. Aer Lingus flies between Shannon and Dublin.

Etiquette: Pre-arranging appointments is not essential, but is appreciated. A call on the day to confirm the appointment is always a good idea, as business tends to be flexible.

There is little formality in travel agencies. People immediately use firstname terms in their business dealings. The Irish are also keen negotiators and will react well to special offers, discounts or additional benefits for their clients.

As in most marketing, personal contact is greatly appreciated, and in Ireland it is seen as evidence that a company is taking the market seriously and acknowledging that it is distinct from the other market. When referring to the Republic of Ireland simply use the word Ireland and not Eire (unless you speak Irish fluently!). Northern Ireland is referred to as “the North”. When talking about Northern Ireland’s second city use the word Derry and never London derry.

If you can price in Euros it helps enormously. This means people can easily identify value, as the perception of any price in £ sterling is that it is expensive.

Ireland has changed to the metric system and although people are aware of imperial measurements, Ireland has embraced the change over far more quickly than the UK. Please be aware of distances in Kilometres and metres for brochures and print. All road signs in Ireland are now in km.

Business Visits / Events

Business Visits Trends

- Because of Ireland's comparatively low population, the number of incentive / corporate agents is small and is concentrated in the Dublin area, with some regional companies based in other cities such as Cork. Many companies book through business travel agents, and do not use DMC or ground handlers.
- Incentive houses in Ireland are not very common and it is usually a business/corporate travel agent or even tour operator who makes the corporate group arrangements.
- Event management companies in Ireland tend to deal with all aspects of business travel, from conference to incentive travel, they tend not to be specialised.
- Many of the major Tour Operators in Ireland have Corporate Departments, which handle the company's key business accounts. These are mainly based in Dublin, and there are about 6 main players. The majority of them are members of the Guild of Business Travel Agents.
- However, many companies, through their Travel Managers, book direct with the supplier, having already sourced the information, or if they know exactly what they are looking for. Relations between Britain and Ireland and knowledge of the market are such that this is often the easier option and more cost effective. Companies do not have a language barrier and feel comfortable and familiar with Britain as a destination.

Business Visits Statistics

- Lead times tend to be 3-4 months depending on the size of the event.
- Average length of stay during business trip is 2 days, with average spend per day £167.
- Destinations tend to be focused around cities. London, Manchester, Liverpool and Birmingham are the most popular. Golf and top class resorts are the main reasons for moving away from the City.
- UK suppliers tend to see the Irish market as an extension of the UK domestic market and therefore do not target Ireland as they would with other overseas markets. Ireland is a booming and potentially huge market and partners are missing out on some valuable opportunities of supplying these buyers with new ideas and products that are much needed. There is strong potential for regional destinations, new venues and for longer stays of 3 or 4 days.

Italy Trade & Business

Overview

The Italian travel trade is composed of tour operators, coach touroperators, language study operators and travel agencies.

Tour operators sell their product through their own or independent travel agencies. Increasingly, they also sell directly to the consumer through the internet (although for holidays to Britain the most significant sales are made through travel agencies). In recent years, in principal cities like Milan and Rome, a clearer structure of fairly large tour operators has emerged, each of whose products are sold through a network of retail agencies. The structure - particularly amongst operators selling Britain - is very regionalised, with most operators selling through retail agencies within a fairly defined geographical area.

Coach tour operators usually sell their products through their own or independent travel agencies.

Travel agencies usually sell products produced by tour operators. Some travel agencies, however, also have group departments, which organise holidays for associations. In Italy there are approximately 11,400 travel agencies, of which 8,500 generate significant business. In recent years, travel agency closures and mergers have become commonplace as commissions have shrunk or disappeared and a new generation of customers has moved on-line.

The official Italian body representing the interests of the local travel industry is FIAVET, the Italian Federation of Travel Agents. Membership is not compulsory and it is believed that 50% of the trade are members.

Tour Operators

There are approximately 100 tour operators in Italy featuring Britain; this includes language study operators. Of these, many are restricted to London packages and the majority produces a European brochure. A significant core of tour operators markets the destination in depth and a number of these produce a Britain-only or a Britain and Ireland brochure. Visit Britain Italy focuses activity on these suppliers.

BritLink is Visit Britain Italy's tour operator special interest group, comprising 27 tour operator members from all over the country. BritLink concentrates on the product and specifically how the small to medium-sized operations, which constitute the majority of operators selling Britain, can develop and improve the product they offer in a fragmenting market where their businesses are challenged by significant changes in the way people choose and buy travel.

The group meets twice per year in Milan and in Rome (January, May, and October) in order to update the members on VisitBritain marketing opportunities and activities, gather market intelligence and trade feedback and discuss the product.

A central part of each BritLink meeting is dedicated to strategic and commercial partner presentations. Normally two UK suppliers are invited to present their product and meet key Italian producers. Product educationals are also arranged on an annual basis.

VisitBritain Italy can supply lists of operators featuring Britain, Or language study operators, on request.

Main planning cycle: Compared with other European countries, programme planning in Italy is late. Brochure publication schedules are roughly as follows:

Summer programmes: Milan and the North - February and March, usually to coincide with BIT, Italy's biggest travel trade and consumer exhibition. Rome and the South - by the end of April.

Language study programmes: November/December of the previous year but sometimes later in Rome and the south.

Winter programmes: Throughout Italy: September/October.

Co-operation with ground handlers: In general, tour operators work through a selection of UK-based handling agents specialising in the Italian market, some of which are Italian-owned. Usually the handling agents are very well known by the Italian trade since they attend all the major trade exhibitions in Italy. Relationship with travel agencies The tour operators work very closely with their circle of travel agencies. It is not easy to enter into a well-established relationship between a tour operator and a travel agent. Normally a Tour Operator has sales representatives who make calls on the agencies, supporting and assisting them with bookings, itineraries, etc. Tour operators make significant efforts to build loyalty amongst their agencies through product knowledge educationals, workshops and incentives.

Travel Agents

Despite the large, though declining number of travel agencies in Italy, only a few have a good structure with professional staff, groups department, and business travel specialists.

In recent years with the growth of internet and the expansion of call centres, the role of travel agencies has changed a lot. A decline in business has prompted some to join together in consortia. Some of the most important networks of travel agencies are Buon Viaggio, Sestante, Blu Vacanze, Le Marmotte, Cisalpina, Frigerio, Pinguino, Travelshop.

Declining commissions (especially from the airlines) and the rise of low cost carriers working directly with the consumer has prompted most to charge fees for their services which in turn lowers their competitiveness.

The trend is for agencies to become most valued for their product knowledge and segment specialisations and these can still command a premium with customers. For example, it is becoming increasingly common for customers to buy low cost airline tickets over the web and then to approach an agency for an operator’s ground package.

Market Entry Strategies

Sales Calls

Timing: Avoid visiting Italy during the summer holiday period of mid-June to early-September. Also, bear in mind the times of year when the winter and summer brochures are being prepared. This can prevent you missing the opportunity of being included in operators’ programmes.

Transport: Public transport in Milan is excellent. The metro will get you to most places you intend visiting. The Rome metro is less convenient and you may find it preferable to use taxis. Do not even attempt using your own car in Rome or Milan as parking is extremely difficult to find. If you need advice on taxi fares, please talk with someone in Milan before your departure. The taxi ride from the airport to the centre of Rome is notorious for unscrupulous taxi drivers.

Etiquette: Check for office hours in chosen cities; there is a difference in work ethic between the north and the south.

Always make appointments in advance. However, depending on which cities you are visiting, time keeping will vary. A general rule-of thumb is the further north in Italy you venture, the more reliable the time keeping. Additionally, do remember to telephone on the day to reconfirm appointments. This will save you a great deal of leg work and time.

Bear in mind that if you are new to the marketplace, it is unlikely that you will see immediate results. Often business in Italy is secured as a result of personal contacts, developed over a period of time. If you commit to the Italian market, you will need to visit your contacts at least twice a year.

Language/Culture/Currency: It is important that you speak some Italian, even if you speak it badly. Most Italians in the tourism industry have some knowledge of English, but, because they do not have the occasion to use it frequently, prefer to speak in Italian. If you try to speak their language, you score points! The provision of language brochures is an indication of how seriously you take the market. Try to read up a bit on the politics of the country. This will give you some background information on the political, cultural and financial diversity between the north and south, for example.

Portugal Trade & Business

Overview

The start of 2000 saw a major change in the travel trade structure in Portugal. The main power of the supplier is now concentrated in four Portuguese groups: Sonae Turismo, Grupo Pestana, Abreu and Es Viagens (Espirito Santo Viagens). There are also smaller groups like Tap Air Portugal Tours. These four groups represent over 70% of the market. Over the last year most operators have gradually started operating web pages and on-line reservations are now available. The trade sector is organised into tour operators and travel agencies:

Tour operators sell their product through their own or independent travel agencies. Increasingly, they also deal directly with the consumer through the Internet since most have webpages. Travel agencies usually sell products produced by tour or coach operators. Some travel agencies, however, also have a group department which organises holidays for associations or incentive trips. Hypermarkets are popular travel agency outlets in supermarkets.

Tour Operators

The main power of the supplies is concentrated more than ever in four Portuguese groups, Sonae Turismo, Grupo Pestana, Abreu and late comer ES viagens. There are also smaller groups like TAP Air Portugal Tours. They will offer at least short breaks of two to three days and a week stay with a selection of hotels, day excursions out and the classic 'milkrun' coach tour.

The range of products on offer by the trade is slowly increasing. Car hire/fly-drive and fly-train packages (example Paris and London with Eurostar) are starting to be featured as well as a variety of go-as-you-please programmes using hotels or bed and breakfast accommodation. Regarding the Youth segment, there's increased demand for new and different destinations, as the market becomes more sophisticated due to the increase in on-line information. Mid-October to late January is the main planning period for summer and all-year programmes. The tour operators in Portugal tend to release summer brochures quite late so that very few are ready for BTL, the main travel exhibition in the country, taking place every January and aimed at the public as well.

Travel Agents

There are some 878 retail agencies in Portugal, most of which deal with all kinds of business, selling anything from airline tickets and domestic beach holidays to corporate trips for 150 people.

Market Entry Strategies

Sales Calls

Timing: Mid-October to late January is the main planning period for summer and all-year programmes. The tour operators in Portugal tend to release summer brochures quite late, which is illustrated by the fact that they are usually not available at BTL.

Public holidays 2006: January 1, February 28th, April 14th, April 25th, May 1st, June 15th, August 15th, October 5th, November 1st, December 1st, December 8th, December 25th

Transport: When in central Lisbon use the underground (metro) to avoid the heavy traffic. Alternatively, taxis are quite reasonably priced and an easy way to get around.

Etiquette: Make appointments. Make them in advance, one to two weeks before, and reconfirm them the day before. And be flexible – allow plenty of time between appointments for traffic and talking. Send your brochure(s) in advance. That way you will give the recipient time to digest the contents. Work on personal relationships. That is how business is built up in Portugal, the right contact is the Key. Without personal contact it is hard to win business. Be flexible.

Follow up! Easily and all-too-often forgotten. After your visit, renew contact with both those you did see and those you were unable to see.

Language/ culture/ currency: Most operators and agents speak very good English and are keen to conduct business negotiations in English. Nevertheless, knowledge of a few courtesy words in Portuguese is always appreciated. The number of smokers in Portugal is very high, so there are very few non-smoking areas in restaurants and bars. During lunches and meetings the Portuguese expect to be able to smoke.

Reaching the press - Press Trips: Group visits are not very popular in Portugal, since publications like to have exclusive articles and themes. Nevertheless, group press trips are still very useful as a tool for new products, destinations, events or campaign launches.

South Africa Trade & Business

Tour Operators

There are more than a dozen operators/GSAs in South Africa. Important sources of business include Rand saver (British Airways), Thompsons (who now incorporate Rennie's Options), Absolute Tours, British TIPS, Seekers (Worldwide Tours), Top Holidays, Sure Tours, Travel Vision, Reeds Tours, ATO, Holiday Planners, and Infinity.

The South African is increasingly an independent traveller and most operators offer simple packages with add-on options. Smaller special interest operators, such as those involved with sporting tours, also generate significant business. Most of the GSAs are situated in Gauteng.

Travel Agents

There are numerous travel agents operating in SA, some are independent while others work as part of various franchises. Travel agents earn commission on any flights they sell, along with accommodation, tour and car hire bookings. VBSA runs online training for agents via the travel info portal. This training is ongoing and constantly updates the agents' knowledge.

Market Entry Strategies

During public holidays, you will not be able to reach the travel trade. The following is a list of public holidays in South Africa:

New Years Day 1 Jan
Human Rights Day 21 March
Good Friday 14 April
Family Day 17 April
Freedom Day 27 April
Workers Day 1 May
Youth Day 16 June
National Women's Day 9 August
Heritage Day 24 September
Day of Reconciliation 16 December
Christmas Day 25 December
Day of Goodwill 26 December

General etiquette of conducting business calls would be similar to how it is done in the UK, although South Africans may be less formal. The dress code is smart work clothes and some travel trade operators have uniforms for their staff. English is widely spoken and therefore there is no need to learn local languages. Customs are very similar to those

of the UK. South African citizens do not require a visa to travel to the UK if they are going for a holiday for less than six months.

Reaching the Press: South Africa has a sophisticated press. The key newspapers are TheStar and The Citizen as dailies; Sunday Times as the national Sunday newspaper and Business Day as the national daily business publication. There are also a number of regional newspapers in various South African languages.

Spain Trade & Business

Overview

There are approximately 2,650 tour operators and travel agencies with 6,000 sales outlets in Spain. 40% of these are in Madrid and Barcelona. It is important to know the differences between tour operators and travel agencies, all of whom are controlled, in terms of the granting of licences, by regional government. There are three types of licence:

Mayoristas: These are wholesalers who organise all types of tourism services and packages. They can only sell through travel agencies (minoristas). There are approximately 75 mayoristas who have another 70 branches (delegaciones) throughout the country. Into this category would fall operators such as Tiempo Libre/Mundi Color, Frantour/LondonNow, Club de Vacaciones and Iberojet.

Minoristas: There are about 2,000 retail agencies of which 1,400 have branches throughout Spain, eg Viajes Halcón; Viajes Iberia. They can only sell to the public and not to other retailers.

Mayoristas/Minoristas: Can act as both operator and retailer. There are around 200 businesses falling into this category, with another 1,300 branches. Viajes El Corte Inglés and Viajes Marsans are examples. As in most other developed countries, there are large travel industry blocks forming.

Tour Operators

Virtually all tour operators feature Britain either in a dedicated brochure or as part of a European programme. They will offer at least short breaks of two to three days and a week stay with a selection of London hotels, day excursions out of London and the classic 'milk-run' coach tour of Britain, with heavy emphasis on Scotland.

The range of British products on offer by the trade is increasing. Car hire/fly-drive packages are increasingly being featured as well as a variety of go-as-you-please programmes using hotels or bed and breakfast accommodation. However, what is increasingly being requested by the consumer is not always available in travel agencies and the general level of travel agency knowledge of, and interest in, more esoteric customer needs such as farm holidays or self-catering is limited.

Mid-September to early December is the main planning period for summer and all-year programmes. Other good times are: mid-January to two to three weeks before Easter; two weeks after Easter until June. Bad times are: mid-July to mid-September – for all sorts of reasons, but principally there will not be many people to see! Also, two weeks before and after Easter and the week before each 'puente'. Later in the week is generally better than earlier.

Generally the tour operators use the ground handlers in the UK, but it is a question of costs so they also go direct to the suppliers.

There are a high number of professional associations within the operators.

Market Entry Strategies

Sales Calls

Timing

Consider the timing of your visit. Mid-September to early December is the main planning period for summer and all-year programmes. Other good times are: mid-January to two to three weeks before Easter; two weeks after Easter until June. Bad times are: mid-July to mid-September – for all sorts of reasons, but mainly because there will not be many people to see! Also, two weeks before and after Easter and the week before each puente. Later in the week is generally better than earlier.

Check the holiday calendar as far in advance as possible.

Public holidays 2006

January 6th, April 13th and 14th, May 1st, July 25th, August 15th, October 12th, November 1st, December 6th and 8th, December 25th University holidays fall from mid-June until the first or second week in October. School holidays are approximately mid-June until the middle of September. There are normally two-week holidays at Christmas and Easter. As always, there are variations between the different regions.

Transport: Use public transport in the main cities. If there is a metro, use it at rush hours and during the long lunch hours when traffic can be bad.

Etiquette: Make appointments. Make them in advance, one to two weeks before, and reconfirm them the day before. And be flexible - allow plenty of time between appointments for traffic and talking. Send your brochure(s) in advance. That way you will give the recipient time to digest the contents.

Work on personal relationships. That is how business is built up in Spain. Without personal contact it is hard to win business. Be flexible. And remember that talking is important – the Spanish love to talk and are among the readiest of Europeans to express their views forthrightly. Get yourself updated on the state of the market. But please do make an appointment early to avoid disappointment.

Follow up! Easily and all-too-often forgotten. After your visit, renew contact with both those you did see and those you were unable to see.

Language/ culture/ currency: Speak some Spanish. English is becoming more common, but is still much less used and understood than in Northern Europe and Scandinavia.

Have Spanish language brochures/information - a must if you want to build up Spanish business. Brochures in English reduce your chances of success. In the worst case, have a Spanish cover letter or introduction. Be sensitive to nationalism. The Spanish are rather proud of their regional strengths and differences, especially in Cataluña where some say they would rather speak English than Castilian.

United Arab Emirates Trade & Business

Overview

Middle Eastern travel agents have limited product knowledge and the majority act purely as ticketing agents.

Majority of travel agents in the UAE offer and provide air-ticketing services only. Agents in the region operate on high volume and low margins. The market tends to be highly competitive with customers very rarely being loyal to any one agency. They can be influenced by a marginal difference on the price of a holiday, which often result in local price wars.

Travel tends to be orientated towards families with a high emphasis on individual tailored arrangements. However, airline packages/holiday packages are emerging as a desirable alternative allowing customers to obtain better value. The travel trade must not ignore the impact of the internet in destination and product promotion. Pro-active agents are already on e-mail and creating their own websites and undertake E-mail direct marketing. The impact of the internet could be significant in the years to come in the Middle East although right now it is a novelty.

Tour Operators

Emirates Holidays have the monopoly where tour operators are concerned. There are a few other tour operators but EKH gets the majority of the business. Their main planning cycle happens from September to November when they start pulling new product content together for their brochure which is launched at the Emirates Holidays Fair at the end of April. They are based on Sheikh Zayed Road in a purpose built building next to the Dubai Airline Centre.

Travel Agents

There are approximately 1000 agents in the UAE. Most of the travel trades are Asian and always entrepreneurial and looking for opportunities to make their agency stand out from the rest.

The Middle East is a very late booking market so it's always advantageous to keep in touch with the agents and update them on any special offers which they can include in a tactical promotion. Good relationships with the prominent agencies in the UAE are developed with Key Account System for the Travel Trade.

Wholesalers: There are very few wholesalers in the marketplace. Airlines and holiday divisions of airlines tend to offer this service with the exception of approximately 10 major operators in the Middle East. These operators tend to be based in the Gulf region i.e. Dubai, Abu Dhabi, Bahrain and Saudi Arabia. The wholesalers are disguising

entering into a price war by offering value added inducements into their current holiday packages.

Representatives: A number of the prominent travel agencies in the UAE are General Sales Agents for products of different countries.

Market Entry Strategies

Sales Calls

Before your visit get the latest information about UAE. Key times for promotional visits to the region are February through to late May/early June and September through November. Avoid Ramadan, Eid holidays and the summer period beginning end of June through to the middle of September.

The key cities to visit in the UAE are Dubai, Abu Dhabi and Sharjah. The best time to visit travel agents is between 0900 and 1300 Monday through Wednesday. Government offices and departments in the UAE have recently changed their working week to Saturday-Wednesday. The majority of the travel trade are Asian and English is widely spoken so it is not necessary to be able to speak Arabic

Travellers holding passports from the following countries do not require a visa. Andorra, Australia, Austria, Belgium, Brunei, Canada, Denmark, Finland, France, GCC Countries, Germany, Great Britain, Greece, Hong Kong, Iceland, Ireland, Italy, Japan, Liechtenstein, Luxembourg, Malaysia, Monaco, The Netherlands, New Zealand, Norway, Portugal, San Marino, Singapore, South Korea, Spain, Sweden, Switzerland, USA, Vatican City.

Compared with certain parts of the Middle East, Dubai has a very relaxed dress code. However, care should be taken not to offend by wearing clothing which may be revealing for example, low-cut dresses, very short skirts or tight jeans. Men should always wear a shirt or top in public.

For meetings a business suit is the appropriate attire.