



Lifelong  
Learning  
Programme

UHPA

udruuga hrvatskih putničkih agencija  
association of croatian travel agencies

# Tourism structures in Germany + asr – Alliance of Independent Travel Traders Germany



asr UH→PA

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Dipl. Ing. Detlef Meyer

Chairman International Relations  
asr, Friedrichstr. 119, D-10117 Berlin  
[www.asr-berlin.de](http://www.asr-berlin.de)  
[international@asr-berlin.de](mailto:international@asr-berlin.de)



Managing Director  
HCI Heritage Consult International Ltd & Co KG  
Collegienstr. 59d, D-06886 Lutherstadt Wittenberg  
[www.heritageconsult.com](http://www.heritageconsult.com)  
[dmeyer@heritageconsult.com](mailto:dmeyer@heritageconsult.com)

hci

You can find me on LinkedIn, Facebook, Skype, Twitter



# UHPA Tour operator

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- \* Tour operator – is offering prepackaged tour to travel agents and tourists
  - \* Most of them are selling only through travel agents
- \* Travel agent
  - \* Sells this tours to tourists, don't organize packaged tours
  - \* High street, online, mobile



# UHPA Tour operator

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- \* Number of touristic tours in 2012: 69,3 Mio.,
- \* More than **40% packaged** tours booked through tour operator or travel agent
- \* **92% booked in a travel agency**
- \* With 10.000 travel agencies – one of the highest numbers of Travel Agencies per capita in the World



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- \* more than 2.500 tour operators
- \* a lot of middle sized and any big international tour operators – unique in the world



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- \* number of travellers: 53,6 Mio.\* (2011 - 53,6)
- \* 1,3 tours per year per traveller
- \* 76,3 % of population is travelling
- \* expenses for outbound travel: 63,9 Billion Euro



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# Tour operator



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- \* Number of trips with more than 5 days
- \* All 69.3 Mio
  - \* Germany 31%
  - \* Outbound 69%
    - \* **Mediterranean 35%**
    - \* Western Europe 12,7%
    - \* Eastern Europe 6,6%
    - \* Scandinavia 3,1%
    - \* Long haul 7,2%



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Auslandsziele	
Spanien	13,0 %
Italien	8,4 %
Türkei	7,3 %
Österreich	5,5 %
Kroatien	2,9 %
Frankreich	2,8 %
Polen	2,1 %
Griechenland	1,9 %
Niederlande	1,9 %
Dänemark	1,6 %





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- \* Short trips (less than 5 day)
  - \* All 74.5 Mio pax
    - \* In Germany 76%
    - \* Outbound 24% (18.2 Mio pax)



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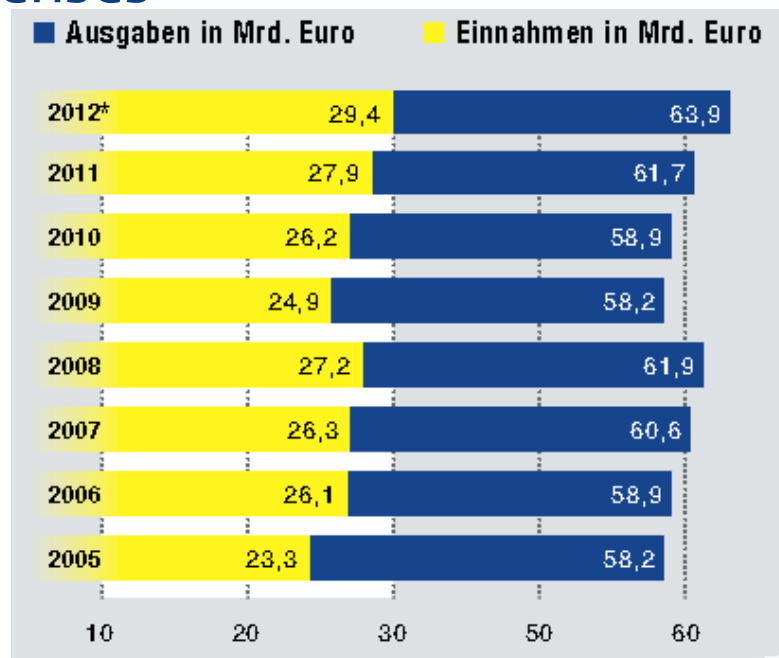


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Auslandsziele	
Österreich	4,3 %
Niederlande	2,9 %
Spanien	2,2 %
Frankreich	2,1 %
Italien	2,0 %
Großbritannien	2,0 %
Schweiz	1,9 %
Tschechien	1,5 %
Polen	0,8 %
Dänemark	0,7 %



## \* Travel expenses





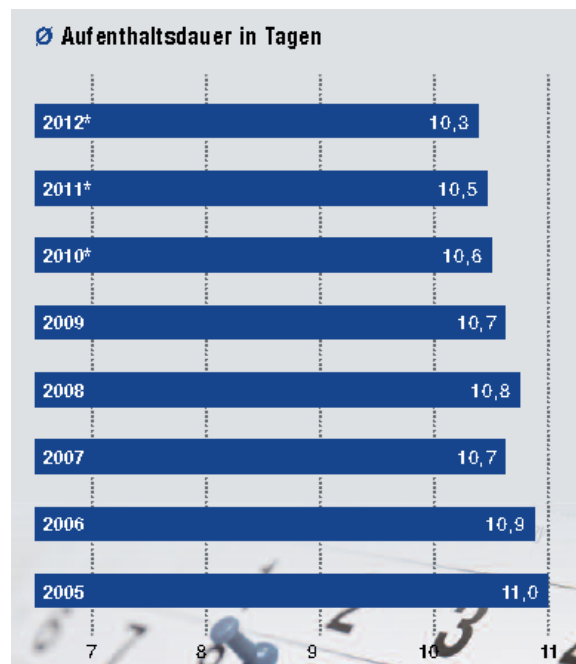
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## \* Duration





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- \* Coach travel
  - \* In 2011 4.100 coach travel companies
  - \* More then 79 Mio pax
  - \* Top destinations outbound
    - \* Italy 12,7%
    - \* Austria 9,5%
    - \* Poland 9,2%
    - \* Spain 5,5%
    - \* France 4,9%



# UHPA

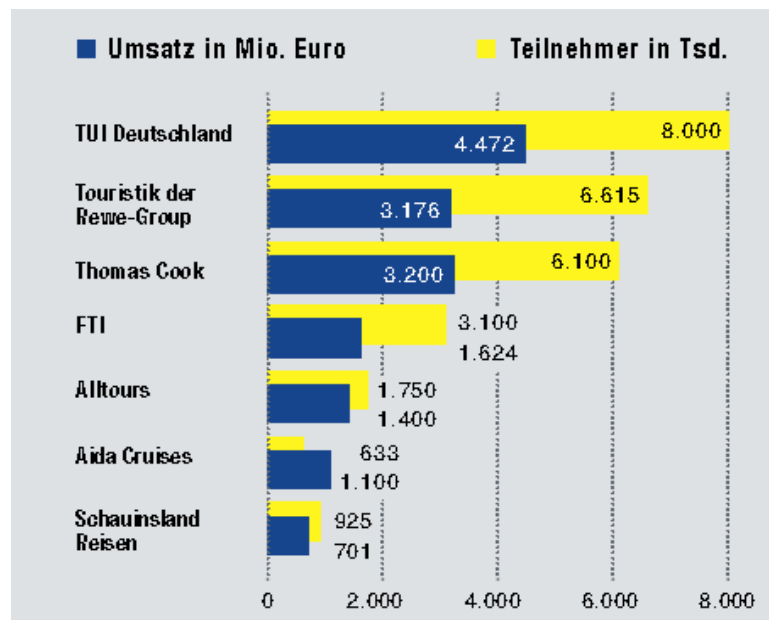
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# Tour operator



Lifelong Learning Programme

## \* The biggest tour operators





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- \* The biggest tour operators with more than 60 Mio € turnaround (I)
  - \* L Tur
  - \* GTI
  - \* Phoenix
  - \* Studiosus/Marco Polo
  - \* Bigxtra
  - \* TUI Cruises
  - \* Hapag Lloyd Cruises
  - \* Aldiana
  - \* Inter Chalet



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- \* The biggest tour operators with more than 60 Mio € turnaround (II)
  - \* Nicko Tours
  - \* Hurtigruten
  - \* Gebeco/Dr. Tigges
  - \* Ameropa
  - \* JT Touristik
  - \* Vtours
  - \* LMX Touristik
  - \* Arosa River Cruises
  - \* Wikinger Reisen
  - \* Ferien Touristik





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## \* Tour operators

- \* Allrounder

- \* Specialists

- \* By destination

- \* By themes (sport, wildlife, culinary, culture, theater etc)

- \* By target groups (youth, elder people, banks, newspapers etc)



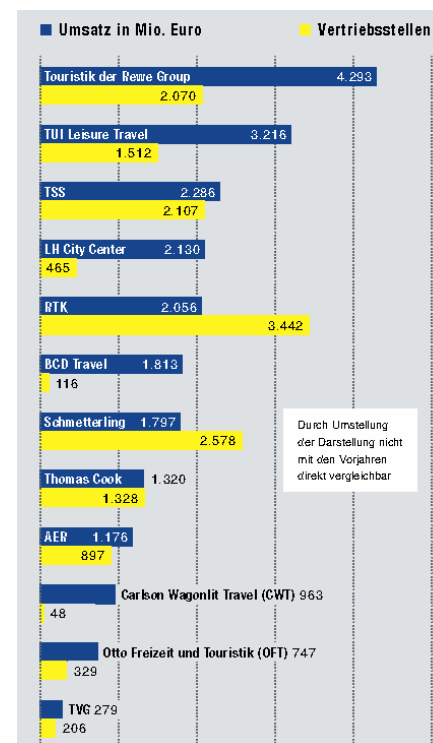
# UHPA Travel Agencies

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## \* The biggest travel agencies





# UHPA Travel Agencies

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## \* Number of travel agencies in 2012

- \* Allrounder 2.635
- \* Business Travel 777
- \* Only touristic 6.574



# UHPA Travel agencies

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- \* Sale of all packaged tours, dynamic packaging and extra services (insurances / car rental)
  - \* High street
  - \* Online
  - \* Mobil agents



# UHPA Travel agencies

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- \* Commission
  - \* Minimum turnover for leading tour operators
  - \* Quantity vs. Quality
  - \* Price driven
  - \* Only a few specialists



# Tourism service chain



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- \* Tour operator ↔ travel agent ↔ customer/tourist
- \* Tourist knows TO
- \* Tourist trust the TA
- \* TA depends of TO



# UHPA Marketing

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- \* Marketing strategies
- \* Question
  - \* What are you doing?



# UHPA Marketing

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- \* A ttention
- \* I nterest
- \* D esire
- \* A ction





# UHPA Marketing

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- \* Customer
  - \* Emotions, pictures, recommendations, TV, press
- \* Travel Agent
  - \* Easy to book, easy to sell, knows the destination,
- \* Tour operator
  - \* High request from customer, new ideas to differentiate from competition, otherwise selling about prices, trust in DMO, established connections



# UHPA Marketing

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- \* Tour operator
  - \* Must have requests from customers
  - \* For TO needs tailored programs
  - \* Destination + Services
  - \* Price + Sustainability / be reliable
  - \* Help to sell your product



# UHPA Marketing

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- \* Travel Agent
  - \* Knowledge about destination
  - \* Knowledge about products
    - \* He should visit the destination
  - \* Benefits
  - \* Should be in catalogues listed in his agency
  - \* Positiv feedback from customers
  - \* Help to sell your product



# UHPA Marketing

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## \* Web 2.0

- \* Facebook – feedback channel, customer relations (CR) (customer = tourist)
- \* Twitter – fast reaction – requests – questions – crisis management
- \* LinkedIn – B-to-B, groups, contacts, networking
- \* Pinterest – pictures = emotions, CR
- \* YouTube – video = emotions, CR
- \* Blogger



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- \* Founded 1976
- \* Ca. 550 member
- \* Tour operator, travel agencies, hotels, consultants
- \* Small and medium sized companies
  - \* 280 travel agencies
  - \* 160 tour operator
  - \* 15 international member



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- \* Motives & objectives
  - \* Only independent SMB
  - \* Service for member
  - \* Lobbying in industrie and politics
  - \* Public relations



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- \* Relation with the government
  - \* formal and informal
    - \* Contact to members of parliament
    - \* Participation at different committees
    - \* Invitations
  - \* 2,8 mio employees, 8% of the GDP



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## \* Main success stories ASR lobby activities

- \* Hotel taxes
- \* Financial protection
- \* Visa China
- \* Flight taxes → Bruxelles
- \* Sustainability





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- \* We work together with other associations / stakeholders
  - \* Ad hoc discussions
  - \* Committees
  - \* agreements
  - \* Differentiation
  
- \* BTW



# Other tourism associations



- \* BTW (Federal Tourism Industry Association)
- \* DRV (Deutscher Reise Verband)
- \* DTV (German Tourism Association)
- \* DZT (German National Tourism Board)
- \* More than 80 different other tourism associations
- \* Local tourism associations - hundreds



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## Service for members

- \* Trade fairs
- \* Insurances – information and assistance
- \* Academy
- \* Legal advice
- \* Tax advice
- \* Management consulting
- \* Whole sale contracts



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## Membership costs

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- \* 432 € per year
  - \* Very small travel agencies (1 or 2 employees) – 50% discount
- \* different discounts and surcharges
- \* 256 € for international members per year



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Faire  
Partner  
immer der richtige Experte

## Faire Partner – Fair Partners

- \* medium-sized tour operators with high-quality and individual travel
- \* offer better service, more flexibility and a greater selection of special destinations
- \* With higher commissions the right partner for the travel distribution - they are the alternative!



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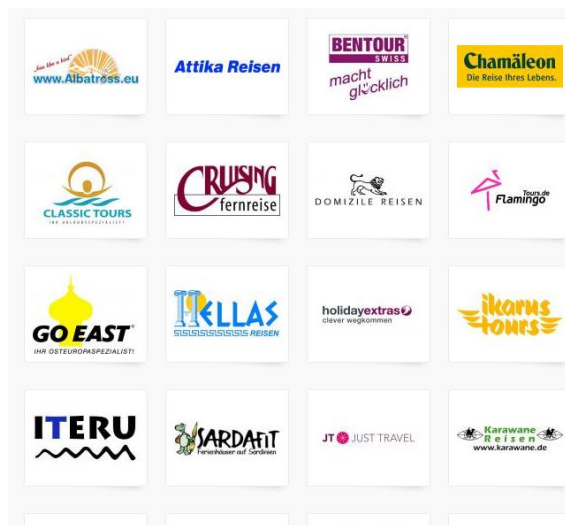
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## Faire Partner – Fair Partners

\* <http://www.faire-partner.com/>





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## Sustainability

- \* As project partner in the international sustainability project Intour the asr is strengthening its commitment to sustainable tourism
- \* Interested travel companies get support from the asr
- \* The project is funded by the 'EU eco-innovation programs "and persecuted throughout Europe in 14 countries



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## \* International relations

### \* Partnerships

- \* With other associations around the world
- \* Based on signed agreements, no cost

### \* Lobbying

- \* UHPA, RUTI - Russian Union of Tour Industry, CATA - Central Asian Tour Association, WATA –World Association of Travel Agents, ÖVT – Austrian Association of Tour Industry, Sansibar, ETAA – Egyptian Travel Agents Association

E.T.A.A.



Egyptian Travel Agents Association  
جمعية شركات ووكالات السفر والسياحة







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- \* International relations
  - \* membership
    - \* With tour operators and travel agents around the world
    - \* Application
    - \* membership fee – 256,00 € per year



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- \* International relations
  - \* membership
    - \* **At the start of your membership**
      - \* Take the advantage to promote your company in the rubric “members introduce themselves” and present yourself to our members.



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- \* International relations
  - \* membership
    - \* **Present and linking your company on our website**
      - \* In the section “international members” on our website members are offered the chance to present themselves to other members as well as visitors of the page.
      - \* Moreover, you can put a link to your website in our portal, in order to draw attention to your own online presence



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- \* International relations

- \* membership

- \* **Updating of data**

- Use the possibility to update your data

- \* **asr newsletter**

- Receive information from the regular asr Newsletter (in English)



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- \* International relations

- \* membership

- \* we send monthly a newsletter to german members with the offers of our international members, as member you can use this 4 times a year

- \* Take part on our ITB joint booth

Being an international member we offer you the opportunity to take part on our ITB joint booth for a special discount.



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- \* International relations – networking
  - \* Newsletter
  - \* Use our membership database
  - \* Event (General assembly, workshops, trade fairs)



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## Coexhibitor at ITB

- \* Become part of the annually asr common booth at the ITB 2014 in Berlin and present yourself to the world's largest tourism fair.
- \* We offer you the opportunity to present your company easily to a well placed stand of 100m<sup>2</sup> and a 3-sided presentation area. Meet existing and new partners in a professional environment.



The World's Leading  
Travel Trade Show



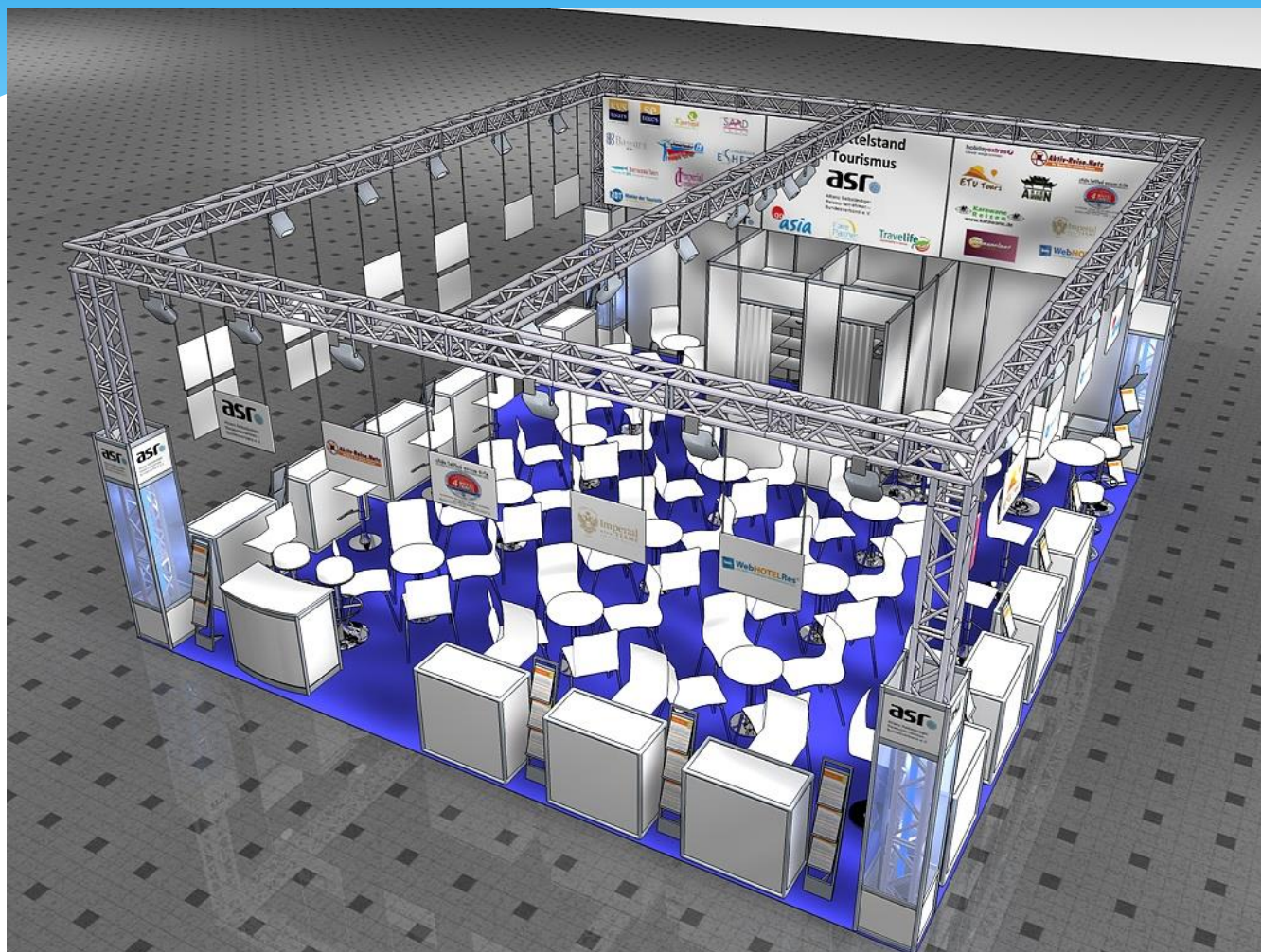
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# asr



Lifelong Learning Programme



Zagreb / Zadar 2013, asr (Detlef Meyer, HCI Heritage Consult International)





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## Coexhibitor at ITB

- \* **Your benefits at the asr common booth**
  - \* Place for meetings with partners and customers to now 100m<sup>2</sup>
  - \* improved representation of each co-exhibitor
  - \* complete organisation of you trade participation
  - \* professional support throughout the trade
  - \* effective networking at the booth
  - \* booth party



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## Coexhibitor at ITB

- \* **Package Services**
  - \* 1 counter with display area, company logo
  - \* 1 meeting table with 4 chairs
  - \* company logo at the stand (Banner) conspicuous presented
  - \* description of the company with contact details and range of goods
  - \* print in the ITB catalogue
  - \* state care
  - \* 1 exhibitor pass
  - \* daily catering (Snacks, Softdrinks, coffee, tea)
  - \* daily stand cleaning



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## Coexhibitor at ITB

- \* **Package 1: Complete package - 5 days (05.03.-09.03.2014)**
  - \* services as described above
  - \* **3.800,00€ excl. VAT.**
- \* **Package 2: Complete package - 3 days (only trade days – 05.03.-07.03.2014)**
  - \* services as described above
  - \* **2.450,00€ excl. VAT.**
- \* **Package 3: Complete package - 2 days (only visitor days – 08.03.-09.03.2014)**
  - \* services as described above
  - \* **1.650,00€ excl. VAT.**



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## How to prepare for ITB

- \* Product
- \* Catalogues
- \* Business cards
- \* Appointments
- \* Events

TID

<http://www.branchenguide.tid.de>



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Thank You for Your Attention





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- \* Detlef Meyer

- \* Contact

- \* [dmeyer@heritageconsult.com](mailto:dmeyer@heritageconsult.com)

- \* Skype detlefo6886

- \* LinkedIn [de.linkedin.com/in/heritageconsult/](https://de.linkedin.com/in/heritageconsult/)

- \* Facebook <https://www.facebook.com/detlef.meyer>