

CENTRAL EUROPE

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General Market Overview

Germany

- Population of Germany: 82,369 million
- After a long period of chronically high unemployment, stagnation, with an average growth rate of 0.7% between 2001 and 2005, stronger growth has led to a considerable fall in unemployment with the rate at 8% at the end of 2007. Germany's affluent and technologically powerful economy – the fifth largest in the world in PPP terms - showed considerable improvement in 2007 with 2.6% growth. This will certainly not remain due to the latest developments in the worldwide financial crisis. First impacts are already seen in certain industries (like car production) and will also affect consumer behaviour over the next months. Growth is predicted to definitely fall below 2% in 2008 as the strong Euro, high oil prices, tighter credit markets, and slowing growth abroad take their toll. Finance experts already speak of a recession period, which might threaten the German economy in the near future.

Switzerland

- Population Switzerland: 7,49 million
- Swiss inflation remained at 2.9 per cent in June 2008 (unchanged from May 2008), driven mainly by oil-based goods and seasonal goods. However, the Swiss National Bank is cautious of effects from higher inflation. The Swiss Government has not reported any impact of the worldwide financial crisis so far but the Swiss Bank System will surely be affected by it too.

Austria

- Population Austria: 8,2 million
- Like in most European countries, the latest worldwide financial crisis is showing an impact on the Austrian economy already. Forecasts for the economical development predict a lower rise in growth than originally expected – current figures stated will be around 1.2% instead of the original forecast of 2% for 2009. Still, financial experts expect the economy to regain strength in the second half of 2009 if the worldwide crisis management shows a steady impact.
- Consumer demand remains slow due to the economic climate (increased prices for fuel, oil, nutrition, etc.). Approx. 52% of Austrian consumers are concerned about the economical development and are reluctant to spend on luxury items.
- Unemployment figures are expected to slightly rise again in 2009, experts expect approx. 6.3%.

Market Profile

Germany (Source: TA research and statistical reports)

- Visitors to Australia until end of June 2008: 148,200 (+4%) (*source: IVS 12 mths to Jun 08)
- In terms of visitor numbers, Germany is currently Australia's 8th largest inbound tourist market. Arrivals from Germany are expected to perform well over the next 10 years with an average growth rate of 3.7 %.

Consumer Trends

- In the year ending June 2008, the number of visitors from Germany totalled 148,200, which means a total increase by 4% compared to the previous year (*source: IVS 12 mths to Jun 08). Germany is currently Australia's ninth largest inbound tourist market.
- 38% of German households went on a holiday trip between November 2007 and April 2008 – up 0.7% compared to the same period a year ago. In absolute terms, 13.4 million households went on 43.9 million trips, up 1.5%. Holiday spending in this group reached 22.1 billion Euro, up 0.9%.
- Germany is Australia's 8th largest source market in terms of total expenditure. In 2007 travellers from Germany spent a total of \$943 million on trips to Australia, with an average expenditure of \$6,453 per trip.
- The average length of stay for German visitors in 2007 was 46 nights, much higher than the average of 30 nights for all visitors.
- The market share of single households in holiday travel activities increased by 7.8%, that of consumers between 50 and 64 years by 4.7%, and that of consumers 64 years and older by 5%. In contrast, the market share of all families decreased by 3.6%, that of families with two children by 8.5%. 19.8 million holiday trips went abroad, plus 500,000 trips, with Switzerland, France, Austria, Turkey and Egypt being the main winners. The monetary share of locally booked excursions dropped by 3.5%. Local bookings for wellness, sports and fitness increased by 5.9% in spending.
- The most popular long haul destinations are USA/Canada, Asia, Caribbean, South Africa and Australia / New Zealand.
- In 2007, December was the peak month for visitors from Germany, followed by February and March.
- Most visitors from Germany (62%) used the internet to find out more about Australia after they decided to visit.

Language

- English is learned as the first foreign language in school. Most of German long-haul travellers speak fair English and feel secure enough to travel to Australia.

Annual leave entitlements

- German employees have an average of 30 days of holidays and can take up to 3-4 weeks at one time. Employees tend to take 2-3 weeks maximum on average.

Switzerland (Source: TA research and statistical reports)

- ABS Swiss visitor arrivals to Australia for the month of July were down by 9% on the same month in 2007. Year to date (seven months to July) figure is down by 2% relative to the previous year.

Consumer Trends

- In 2007, the average length of stay for Swiss visitors was 43 nights, much higher than the average of 30 nights for all visitors.
- Switzerland is Australia's 22nd largest source market in terms of total expenditure. In 2007 travellers from Switzerland spent a total of \$322 million on trips to Australia, with an average expenditure of \$8,143 per trip.
- In 2007, the age distribution shows 6% were aged 0-14 years, 19% were 15-24 years, 25% were 25-34 years, 19% were 35-44 years, 14% were aged 45-54 years and 19% were 55 and over.

- In 2007, December was the peak month for visitors from Switzerland, followed by January and March.
- A survey by the University St. Gallen has revealed that Swiss consumers have never travelled as much. The Internet, friends and brochures have been reported to be the main factors in decision-making.
- The most common source of information for first time travellers from Switzerland was a travel agent. This was used by 47% of first time visitors when planning their travel. A further 45% used the internet and 42% used a travel book or guide .
- Several Swiss wholesalers have reported increases in turnover for sales to Australia.

While passenger numbers have fallen slightly there is tendency for high-end bookings. This trend is consistent by the fact that 25 % of all hotel nights worldwide are spent in four or five star properties. Swiss wholesalers have reported a perceived decrease in Australian service level, which negatively affects the value for money ratio.

Language

- Swiss are multilingual. German, English, French and Italian are widely spoken.

Annual leave entitlements

- Annual Leave Entitlement is 6 weeks and Swiss can take up to 3-4 weeks at one time.

Austria (Source: TA research and statistical reports)

- ABS Austrian visitor arrivals to Australia for the month of July were up 19 per cent on the same month 2007. Year to date (seven months to July) figure is down by nine per cent relative to the previous year.

Consumer Trends

- Austrian wholesalers are noticing a trend towards high-end products and a decreasing interest and turnover in the mid-priced segment. Increasing on-ground costs for extras such as restaurants, day tours and fuel are impacting consumers' decision to travel to Australia.

Language

- Austrians speak German. English is learned as the first foreign language in school.

Annual leave entitlements

- Annual Leave Entitlement is 6 weeks and they can take up to 3-4 weeks at one time.

Market Trends (Source: TA research and statistical figures and trade magazines)

- In 2007, the German tourism industry experienced sustainable growth for both inbound and outbound travel. As the largest European country (geographically) with the biggest population, Germany has traditionally had a very strong outbound travel market, with expenditures abroad reaching €61 billion in 2007, according to a study by Dresdner Bank. On a national scale, the large volume of domestic travellers and international visitors make Germany the seventh largest market in the world.
- Germany travel agents had an 11% rise in revenues from holiday sales in July, according to the latest monthly survey of 2,600 agencies by the TATS organisation. This left overall holiday sales over the first seven months of 2008 up by 7.5%. Its survey also showed strong advance bookings for the autumn. Yet, due to the financial crisis, expectations for the next 6 months have been

considerably lowered by most of the retail agents. Agencies expect stable sales but no major increase in bookings.

- As many as 773 German travel agencies closed down in 2006, according to the latest annual survey by FVW. There are now only 11,866 full-time travel agencies in Germany compared to 15,000 eight years ago. Main reasons for this trend are stagnating sales and lower commission payments. On the other hand, online sales are booming.
- Trends in German travel indicate two areas of growth – those who are ‘time-rich’ (travelling in their retirement) and therefore seek wellness, medical and individual luxury experiences, those who are financially wealthy but time poor, and therefore seek unique experiences, including adventure.
- A group gaining more and more interest among the travel industry is the 50+ generation. Senior travellers will hail from affluent regions with ageing populations including most developed countries (although rising retirement ages may impede this trend in some countries). Many will be seasoned and vocal consumers of products and services, who will have travelled extensively in their younger days. These people are likely to seek holidays with a specific focus, for example, travelling to see friends and relatives abroad, wellbeing/ medical tourism, learning/cultural holidays and ethical voyages.
- Demand for self-drive experiences and travel packages remains strong in all CE markets.

Aussie Specialists - Central Europe (Source: TA)

At 1st October 2008, there were 1,488 qualified Aussie Specialists in Germany, with a further 788 agents in training. Among them, 721 have already passed the SA module.

Market Intelligence (Source: TA research)

Competition

- Tourism Queensland toured 2008 through Europe and visited Switzerland with 25 products to train trade and retail partners.
- Tourism Northern Territory and Tourism Queensland remain highly visible in the CE market with considerably higher budgets ahead of Tourism Victoria and Tourism Western Australia.
- Tourism Tasmania has changed representation in Central Europe and is now represented by Eyes2Market – the new agency seems to be very keen on co-operative activities.
- Tourism New South Wales (TNSW) saw a change in management in CE and is now represented by a former TVIC staff member. This seems to have led to a new approach regarding a closer co-operation with other STOs in the CE market.
- Etihad Airways will offer daily flights from Abu Dhabi to Melbourne as of March 2009 making Melbourne their third Australian destination. They will also increase their weekly frequency to Sydney to a total of 11 flights and keep three weekly flights to Brisbane. Etihad offers daily flights from Geneva to Abu Dhabi.

Challenges

- Effects of worldwide financial crisis may effect consumer behaviour in Central Europe and lead to a downturn in travel plans.
- Increasing airfares (due to fuel costs, tax rise, etc.) may show a negative impact on long haul travel plans. Current special airfares to New York cost as much as fuel/tax surcharge for Australia flights only!

- US Dollar is still very weak compared to the Euro – thus, travel to the U.S. remains very attractive and is mirrored in increasing U.S. travel packages in WS catalogues.
- Service quality and standards in Australia have are becoming major issues among consumers and wholesalers due to mining boom effects on hospitality services and hotel rates in Australia.

Key Themes / Experiences Promoted in the Market

South Australia – the ‘MUST’ first stop down-under when travelling through Australia.

Adelaide – Lifestyle and events city, gateway to various holiday experiences and SA regions.

SA as the Outstanding Nature and Wildlife Destination in Australia – with a focus on Kangaroo Island as a “must see” icon, Coorong NP, swimming with dolphins and sea lions (focus on Eyre Peninsula), unspoilt natural scenery and national landscapes.

Authentic “pure” Outback - Flinders Ranges/Eyre Peninsula with pure Outback atmosphere and wildlife experience, with strong focus on Coober Pedy and National Landscape FR.

Self Drive Destination SA – Explorer’s Way, Nullarbor Touring Route, Adelaide-Melbourne Touring Route, Outback 4WD tracks.

SA as the perfect destination for active and eco-orientated holiday: cycling (with focus on Tour Down Under), hiking, diving, golfing – active experiences in an unspoilt environment and impressive landscape; emphasising SA’s tourism strategy of sustainable tourism.

Food & Wine – well-renowned wine regions like the Barossa, Clare Valley, McLaren Vale and Coonawarra, Adelaide Hills, local produce, multitude of accommodation.

Key Highlights of Marketing Activities in 2007/08

Skytours Explorer’s Way Campaign

Partner: Skytours, Tourism Northern Territory

Timing: Nov 07 – Apr 08

Elements: Explorer’s Way / Outback campaign: Postcard print (supplement to travel documents); 4 postcards with imagery of SA and NT; Flyer Mail-Out to 60,000 consumers; Online viral (duration: 2 months), staff training, website promotion

Target Markets: Experience Seeker, high yield consumers, age group: 35+

Latest results: Webgame saw 78,000 participants, Skytours generated 6,500 new consumer addresses for E-Mailouts, website was visited by 14.5 Million viewers, mailing went out to 60,000 consumers; strong

Increase in catalogue requests (approx. 600); substantial increase in booking requests and 13 bookings generated from the advertised itineraries. Several bookings for other products of SA and NT.

DERTOUR Explorer’s Way Campaign

Partner: TNT, DERTOUR

Timing: Nov 07 – Jun 08

Actions: 16-page supplement in largest travel consumer magazine (200,000 copies for distribution in magazine and among travel agencies); Window Display & 16-page brochure distributed to approx. 8,500 DERTOUR travel agencies; Flyer with travel package as addition

to DERTOUR travel documents (90,000 copies); promotion on DERTOUR website; 2 additional SA product pages in DERTOUR catalogue.

Target Markets: Experience Seeker, Outdoor enthusiasts, age group 25+

Latest Results : According to DERTOUR, SA sales went up by 10% (especially bookings for ADL) as a result of this campaign (while NT figures went down). Almost all SA products that had been newly added to the DER catalogue were picked up by consumers immediately.

STA Youth Campaign

Partner: STA Travel

Timing: May – Jun 08

Elements: Competition on major student website Studivz.net (8 million users) with prize raffle, StudySA and WorkSA pdfs were linked into the user group platform for download; Linkage with STA website with SA teaser video; E-Newsletter (160.000 subscribers) with logo and link to South Australia homepage

Target Markets: Young Travellers, Students, WHV seekers

Latest results: Campaign was very well received; during the period of 4 weeks, trailer was viewed by 3,356 visitors on “YouTube” and by 12,000 visitors on “studivz.net”; STA Newsletter on SA prize competition went out to 122.983 recipients, trailer was clicked 21,205 times. In total 7,206 people participated in the competition.

Online Promotions with Zeitzone.de and Wissen.de

Partner: SATC, Boomerang Reisen, Roadsign

Timing: Jun - Aug 08

Elements: Website promotion for South Australia and its new German website on two popular German websites with prize raffles, viral game and SA dedicated pages (12 on Wissen.de) plus SA teaser videos

Target Group: Experience Seekers, age group 30+

Latest results: Within 4 weeks only the viral game (produced for SATC) on Zeitzone.de had approx. 2,000 visitors which participated in the prize raffle; the game itself was clicked by more than

3,600 players. Wissen.de featured 12 pages on South Australia and 2 videos – results: 1.8 million page impressions, 57,000 visits to the SA pages and 8,000 video clicks; substantial increase of visits to SATC’s German language website.

Boomerang Reisen South Australia Campaigns

Partner: Boomerang Reisen, McFit Fitness Studios

Timing: 3 initiatives, timed from Jan - Nov 08

Elements: SA promotion in 100 fitness studios of Germany wide operating company “McFit” (currently becoming very popular as both Boxing World Champions Vitali and Wladimir Klitschko run advertising campaigns on TV) – over 600,000 members – with video spot on studio TV terminals and prize raffle. In separate initiatives, a 4-page SA special feature was also featured in Boomerang’s member magazine, and further promotion was undertaken in their E-Newsletter, which was distributed to 30,000 consumers.

Target Markets: Experience Seekers, active travellers, age group 25+

Latest Results: campaign ran in September and October, therefore results yet to be expected

Trade Shows / Consumer Events

DERTOUR Mega Workshop Kuala Lumpur (Nov07) - Trade

Training workshop for 700 travel agent; SATC shared workshop with NT, QF and DERTOUR to promote and train agents on the Explorer's Way.

FTI Roadshow (Nov07) – Trade

SATC participated in retail agent roadshow with info stand – approx. 1.400 agents in 5 major German cities participated.

ITB (Mar 08) – Consumer & Trade

SATC office Frankfurt attended the travel trade fair (biggest next to WTM/London). Meetings with CE Product Managers and Media. SA collateral was distributed at the consumer section of the Tourism Australia stand.

AAT Kings Breakfast Seminars (May 08) – Trade

Australia workshops (partners: TVIC, Emirates, AAT Kings) for retail travel agents in 3 major German cities (Hamburg, Dresden, Essen) – number of trained agents: 115.

DERTOUR Roadshow “Ferne Länder” (Aug 08) – Trade

545 travel agents were trained in total in 5 German cities by the Tourism Australia platform as a Destination Australia Partnership (DAP) initiative.

Meiers Weltreisen Traveltalk (Aug08) – Trade

Trade training event with SATC and Meiers Weltreisen with SA presentation for 60 selected best-selling MWR retail agents.

DERTOUR Australia Roadshow (Aug08) – Trade

SATC partnered in DERTOUR training workshops with SA presentation. Events were attended by 300 selected retail agents.

Knecht Australia Day (Sep 08) – Consumer

Knecht Reisen organized an open house event with consumer workshops; the event was attended by approx. 2,000 visitors. SATC hosted an info stand and held presentations in front of approx. 250 consumers.

SATC Operators UK/Europe Roadshow (Sep08) – Trade&Media

Visited 4 major German cities, and trained 300 selected retail agents (invited through the major wholesalers: DERTOUR, Meier's Weltreisen and FTI), Aussie Specialists and wholesale staff members (all major wholesale partners attended, with nearly all reservation and product staff. Thomas Cook also attended with most of their reservation and product staff). Venues also attracted 14 journalists in total with immediate articles resulting in leading travel trade publications.

Coco Tours Roadshow (Oct 08) – Trade

140 travel agents were trained in total in 4 Austrian cities by the Tourism Australia platform as a Destination Australia Partnership (DAP) initiative.

Consumer Shows 2007/8 (DAP partnership initiative)

Germany, Austria and Switzerland:

Stuttgart (CMT – 218,000 visitors), Munich (CBR – 100,000 visitors), Hamburg (Reisemesse – 78,000 visitors), Zurich (FESPO – 73,500 visitors); SATC brochure distribution at all shows. FESPO/Switzerland: consumer presentations on South Australia to approx. 250 visitors; CMT: consumer presentations on SA saw approx. 1,000 visitors.

PR Activities 2007/08

Media Famils from July 2007 – June 2008

10 individual Media Famils

1 Group Media famil

20 press releases from July 2007 – June 2008

4 SA news updates from July 2007 – June 2008

Total PR Value July 2007 – June 2008:

14,700,000 AUD

12 Aussie Specialist Newsletters from July 2007 – June 2008

Total circulation achieved July 2007 - June 2008:

524,377,090 readers

ITB 2008

16 Media Appointments

SATC Roadshow 2008

14 Media Appointments

KEY WHOLESALE PARTNERS

Germany

DERTOUR, BOTG (Best of Travel Group), FTI, Meier's Weltreisen, Explorer Fernreisen, Boomerang Reisen, Gebeco, TUI/Airtours, Thomas Cook Reisen, Canusa Touristik.

Brochure production / validity in average:

- **Brochure production period:** June – Sep/Oct.
- **Brochure Validity:** Normally year round brochures: April – March.
- Reprints with updated prices may be produced in August/September.
- **Brochure Space Policy:** Product can pay for space in wholesale brochures. Product inclusion is generally dependant on the relationships or agreement with partners.
- **Setting Rates:** For the main brochures being released in November/December, rates are needed around ATE time (June ideally) and will be set in July/August.
- **Peak Booking Periods:** December – March.
- **Peak Travel Periods:** July – August (German holidays), October – February.

Switzerland

Knecht Reisen, Kuoni, Flex Travel, Hotelplan, Dreamtime Travel (BOTG), Australasia (BOTG), Nova Tours, Ozeania, Skytours

Brochure production / validity in average:

- **Brochure Production period:** Aug/Sep – December.
- **Brochure Validity:** 12 months - most brochures come out in the first three months of the year, normally late January to March.
- **Brochure Space Policy:** If a product is compatible with the tour operator's product portfolio, product operators may be able to purchase space in brochures.
- **Setting Rates:** Generally November to December.

- **Standard Rate Validity Periods:** 1 April to 31 March.
- **Peak Booking Periods:** March – May.
- **Peak Travel Periods:** Mid December-February, July-August (holidays in Europe).

Austria

Jet Touristik, Jedek Reisen (both BOTG), Coco Tours Weltreisen, FTI, DERTOUR.

Brochure production / validity in average:

Similar to Germany.

Active Inbound Companies in the Region

- Australian Outback Travel Company (AOT)
- ATS Pacific
- Wiedemann Travel
- C&E
- Finesse
- Australia One
- Australian Splendour

Opportunities for Operators

- Attendance at ATE 2009
- Become involved in trade and media famils
- ITB Mar 2009 participation
- Participation in Tourism Australia New Product Roadshow London 2009
- Participation in Corroboree May 2009
- Product update information in SA specialist module as part of Aussie Specialist (ASP) Online Training and/or in ASP newsletter
- Advertising in dedicated Australia websites in the CE market, such as www.australien-info.de
- Australia.com

Best opportunities to contact German/Swiss/Austrian wholesalers is to attend the main trade shows such as ATE and ITB, to be featured in the SATC Product Manual and to participate in SATC organised roadshows and workshops. Should you plan to visit the wholesalers in their own markets, best timing for Germany would be Feb-May, and for Switzerland in April (after ITB, before ATE) – larger wholesalers tend to be a bit more flexible. The SATC office in Frankfurt will be happy to assist with co-ordination of sales visits if support is required.

Leading Media - Germany, Switzerland & Austria

National daily/weekly Newspapers

Bild, Die Welt, Die Zeit, Frankfurter Allgemeine Zeitung, Süddeutsche Zeitung, Standard, Neue Zürcher Zeitung and Brückenbauer

Sunday papers

Bild am Sonntag, Frankfurter Allgemeine Sonntagszeitung, Welt am Sonntag, Sonntagsblick and Neue Zürcher Zeitung am Sonntag

Regional daily newspapers

Hamburger Morgenpost, Westdeutsche Allgemeine, Berliner Kurier, Frankfurter Rundschau, Münchner Merkur, Salzburger Nachrichten, Neue Kronenzeitung and Berner Zeitung

Travel magazines

Geo Saison, Abenteuer & Reisen, Reise Aktuell, Tours, Outdoor, Globetrotter, Bon Voyage and Trekkers

Radio travel programs

BR, NDR, WDR, HR, SDR, ORF and DRS

TV travel shows

ARTE Voyage Voyage, VOX Wolkenlos, VOX Tours, ARD Ratgeber Reise, N-TV Reise, BR Fernweh, HR Nix wie raus, ORF1 Schöner Leben and SF1 Einfach Luxuriös

General interest/news magazines

Stern, Focus, Spiegel, Profil, News, Facts and Saldo

Special interest magazines

Feinschmecker, Fit for Fun, Unterwasser, Trekking, Essen & Trinken, Schöner Wohnen and Schweizer Familie

Womens magazines

Elle, Vogue, Madame, Brigitte, Freundin, Cosmopolitan, Joy, Woman

People's glamour magazines

Bunte, Gala, Seitenblicke and 20 Minuten

Male interest magazines

GQ, Men's Health and ADAC Motorwelt

City and university magazines

Prinz, Journal Frankfurt, In München, Go München and TIP Berlin

Corporate client magazines

American Express, Mercedes Benz, BMW and Porsche Magazines

Financial press

Manager Magazin, Financial Times Deutschland, Capital, Wirtschaftswoche, Handelsblatt and Cash

TV Guides

Hörzu, TV Spielfilm, TR7, Tele, TV Media and TV Täglich

Online travel portals

www.TravelChannel.de , www.travel24.de , www.marcopolo.de and www.reiselust.de

News agencies

Reuters, DPA-gms-themendienst, srt and AP

Useful Tips – Working in the Central European Market

Cultural / Trade Issues

- Be mindful of school holidays and seasonal travel patterns to capitalize.
- Germans and Swiss tour operators expect immediate responses to inquiries (especially booking requests). The travel agencies who send an inquiry are under the same pressure as CE customers expect confirmation of their travel plans within the shortest possible timeframe.
- It is not very common in CE that wholesalers pay for bookings in advance - only deposit payments are accepted in some cases.
- CE customers travel mainly unaccompanied or as adult couples.
- The European Travel Laws are very strict. Wholesalers must ensure that hotels, tours and services provided are according to the brochure description, otherwise the customer is allowed to claim a considerable refund. All info given about your product should be as exact and detailed as possible. If changes occur, WS need to be informed as soon as possible. Wholesalers must provide all travellers with an insurance or bank guarantee as insolvency protection.

Products/Services

- Ensure your product is accessible through an inbound operator.
- Send product and rate information, good quality images and brochures with internationally accessible numbers, email and website addresses for international marketing.
- Keep in mind that CE Tour Operators cannot usually use differing rate structures (eg. weekend rates) for their brochures/catalogues as this is uncommon in the market.
- Be mindful of deadlines for wholesalers' brochure production.
- Provide regular product updates preferably via email or fax for our dissemination into the market.
- Ensure consistent and high quality standards for your products/services.

Distribution

- Identify and know who you are targeting to i.e. DINKS, families etc. and also the type of geographical market (domestic or international)
- Learn about the distribution chain and commission structure – *it varies from country to country*
- Contact SATC in Adelaide for advice in maximizing the exposure and target audience for your product
- Establish alliances with other operators to do joint marketing
- Ensure you have adequate administrative resources for efficient contact (especially in the case of a sole person operation).