# Source and package tourism products and services

## D2.TCS.CL5.22
## D2.TTA.CL2.18

## Trainer Guide











Australian Aid | asean | William Angliss Institute | Specialist centre for foods, tourism & hospitality

# Competency Standard

| **UNIT TITLE:** SOURCE AND PACKAGE TOURISM PRODUCTS AND SERVICES | **NOMINAL HOURS:** 70 |
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| **UNIT NUMBER:** D2.TCS.CL5.22 D2.TTA.CL2.18 | |
| **UNIT DESCRIPTOR:** This unit deals with skills and knowledge required to source and evaluate products and services for inclusion into packages for sale to individual and/or generic groups of clients. | |

| **ELEMENTS AND PERFORMANCE CRITERIA** | **UNIT VARIABLE AND ASSESSMENT GUIDE** |
|---|---|
| **Element 1: Describe the context for packages**<br>**1.1** Identify the *clients for packages*<br>**1.2** Identify *client requirements* in relation to packages<br>**1.3** Identify *host enterprise requirements* in relation to packages<br>**1.4** Identify *purposes of packages*<br>**1.5** Identify *products and services* for inclusion in packages<br>**Element 2: Source products and services for packages**<br>**2.1** Identify *sources of information* for products and services<br>**2.2** *Research information sources* to obtain targeted information | **Unit Variables**<br>The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment.<br>This unit applies to sourcing and evaluating products and services for inclusion in packages for sale to individual and/or generic groups of clients within the labour divisions of the hotel and travel industries and may include:<br>1. Travel Agencies<br>2. Tour Operation<br>*Clients for packages* may include:<br>• Individuals and groups, including one-off clients and identified target market sectors<br>• Day tour operators<br>• Hotels<br>• Outbound tour wholesalers<br>• Inbound tour operators<br>• Conference organisers. |

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| **2.3** *Assess applicability of identified products and services* to proposed packages<br>**2.4** *Select products and services* for the package<br>**Element 3: Create packages of products and services**<br>**3.1** Identify *pre-planning requirements* for packages<br>**3.2** Determine *components* of individual packages<br>**3.3** *Determine duration for packages*<br>**3.4** *Calculate price points* for packages<br>**3.5** Develop *terms and conditions* for the packages<br>**3.6** Prepare *draft itinerary* for packages<br>**3.7** *Prepare sales monitoring arrangements* for packages<br>**3.8** *Plan marketing activities* for packages | *Client requirements* must focus on identified client needs, wants and preferences and will include:<br>• Destination preferences<br>• Budget<br>• Timing and duration issues, including constraints and the need for integration with an associated tour or travel program<br>• Cultural and religious issues<br>• Product and service preferences<br>• Practicality<br>• Service styles and standards<br>• Identified focus for undertaking the trip.<br>*Host enterprise requirements* may be related to:<br>• Enhancing and expanding product range including product initiatives that conform to business plan and marketing objectives<br>• Profitability<br>• Movement into new target markets<br>• Reputation and image<br>• Business agreements, including franchise and other contractual arrangements<br>• Meeting competition<br>• Involvement of colleagues in determining requirements.<br>*Purposes of packages* may include:<br>• Conferences<br>• Social events<br>• Holidays and recreation |

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| | • Tour programs including day tours, extended tours, eco-tours, cultural tours and educational tours<br>• Special interest itineraries<br>• Incentives<br>• Series tours.<br>*Products and services* may relate to supplier, intermediary and/or touring packages promoted in brochures and include:<br>• Accommodation including serviced and non-serviced options<br>• Transport including air, rail, bus/coach and shipping<br>• Hire car including long and short-term rentals<br>• Attractions including natural and man-made<br>• Tours including side trips, one-day and extended tours<br>• Catering including bona fide meals and refreshments<br>• Entertainment including recreational, arts, sports, cultural, music, festivals, and special events<br>• Conference facilities<br>• Specialist services including guides, interpreters, secretarial support, child-minding and security.<br>*Sources of information* may include:<br>• Suppliers, carriers and providers, including those in distribution networks<br>• Local tourism information centres<br>• Embassies in identified locations/destinations<br>• Local operators including accommodation properties, tours, venues, restaurants and souvenir shops |

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| | • Tourism authorities including regional, domestic and international<br>• Industry associations including industry peak bodies and government authorities and agencies<br>• General literature including trade press, guide books, holiday and destination publications<br>• Internet<br>• Media<br>• Personal visits to destinations and site inspections of attractions, venues and facilities.<br>*Research information sources* may include:<br>• Undertaking desktop research including internet research and analysis of internal data contained on in-house systems<br>• Analysing existing secondary data including:<br>▪ Domestic and international visitor statistics on departures, expenditure, visitor nights<br>▪ Visitor profiles including tourist origins, volume, purpose of trip, seasonality, accommodation, transport and expenditure<br>▪ Industry and government research reports on industry trends, current development activity and forecasts of future developments<br>▪ Client feedback<br>▪ Feasibility studies for new developments or products<br>▪ Responses to surveys, questionnaires on preferences, needs and current tourist activities<br>• Conducting formal qualitative and quantitative market research including focus groups, surveys and questionnaires to generate primary research data<br>• Considering recent and emerging trends<br>• Using personal network of contacts |

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| | • Visiting providers, carriers and suppliers<br>• Undertaking personal observation<br>• Soliciting feedback from clients.<br>*Assess applicability of identified products and services* may relate to:<br>• Determining rates, costs, fees, charges, taxes for each package component<br>• Evaluating availability on a short-term and on-going basis, as required by the nature of the package<br>• Calculating return on investment, including consideration of loss leader implications<br>• Assessing compatibility with company image and reputation<br>• Verifying reputation of products and services, including assessment of client perceptions in relation to potential carriers, suppliers, destinations, products and services<br>• Identifying features and benefits, including comparisons with similar packages offered by competitors<br>• Checking match between products/services and identified objectives and client demand/requests for the package<br>• Determining destination characteristics, including accessibility and transport, accommodation and attractions, facilities, seasonal influences, degree of infrastructure, government regulations, special events, supporting venues and human resource potential to deliver required services, promotional potential, existing promotional material, retail outlets and ancillary support services<br>• Legal considerations<br>• Cultural sensitivity.<br>*Select products and services* may include:<br>• Aligning with identified objectives<br>• Complying with client requirements |

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| | • Ensuring availability<br>• Negotiating agreements with suppliers, carriers and providers – including obtaining written confirmation<br>• Ensuring value and potential saleability.<br>*Pre-planning requirements* may relate to:<br>• Seasonal influences<br>• Dates of one-off events<br>• Client demand<br>• Position of other packages in terms of product life-cycle<br>• Activities being undertaken by the competition.<br>*Components* refers to the products and services for individual packages and will relate to:<br>• Inclusion<br>• Exclusions<br>• Add-ons<br>• Available options, including substitutions and alternatives, where applicable.<br>*Determine duration for packages* may include:<br>• Formulating packages to accommodate differing timelines in order to meet identified client need<br>• Adding and removing inclusions to enable attainment of required duration while still delivering value and enabling saleability of package.<br>• Complying with agreed arrangements with suppliers, providers and carriers.<br>*Calculate price points* may include:<br>• Analysing prices offered by competition<br>• Determining target market affordability |

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| | • Ensuring required profit to host enterprise<br>• Identifying what the market will bear<br>• Developing price schedules, including special rates and discounts<br>• Determining host enterprise costs pertaining to package development and delivery<br>• Factoring in commissions.<br>*Terms and conditions* may relate to:<br>• Deposits and full/final payments<br>• Fees and charges, including penalties, terms of payment and timelines for payment<br>• Commissions due or payable<br>• Cancellations and alterations, including timelines and charges<br>• Limitation of liability<br>• Guarantees and warranties<br>• Complaint handling.<br>*Draft itinerary* may include:<br>• Day destinations<br>• Times<br>• Destinations<br>• Attractions, tours and sight-seeing<br>• Arranged activities<br>• Accommodation<br>• Transport<br>• Transfers. |

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| | *Prepare sales monitoring arrangements* may include:<br>• Establishing facilities to record enquiries in relation to packages<br>• Establishing internal systems to record package sales, including location of sale, seller, commissions and options selected<br>• Arranging for sales data to be forwarded from related businesses.<br>*Plan marketing activities* may include:<br>• Organising the launch of the packages<br>• Preparation of point-of-sales advertising material<br>• Organising media promotions, including advertisements, events and competitions<br>• Training sales staff in relation to the packages<br>• Designing client feedback tools.<br>**Assessment Guide**<br>The following skills and knowledge must be assessed as part of this unit:<br>• Enterprise policies and procedures in regard to developing packages and entering into agreements with suppliers, providers and carriers including the use of preferred suppliers/providers<br>• Packaging rules as appropriate to the host enterprise and the requirements of allied organisations<br>• Ability to use research, negotiation and analytical techniques<br>• Domestic and international rules, regulations, legislation and practices that apply to package formulation<br>• General industry knowledge of destinations, transport options, accommodation and potential for package-related inclusions suitable for a range of package types. |

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| | **Linkages To Other Units**<br>• Access and retrieve computer-based data<br>• Maintain hospitality industry knowledge<br>• Establish and maintain a business relationship<br>• Develop a marketing strategy and coordinate sales activities<br>• Develop new products and services<br>• Gather and present product information<br>• Use common business tools and technology<br>• Access and interpret product information<br>• Maintain product information inventory<br>• Source and provide destination information and advice<br>• Maintain contacts with handling agents<br>• Construct and apply tourism product research<br>• Co-ordinate production of brochures and marketing materials<br>• Prepare and submit quotations<br>• Manage and monitor innovative tourism programs and projects<br>• Source and present information.<br>**Critical Aspects of Assessment**<br>Evidence of the following is essential:<br>• Understanding of rules, regulations, legislation, policies and procedures applicable to package development within the host enterprise<br>• Demonstrated ability to source inclusions for a nominated package type to meet identified needs of a selected target group or individual |

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| | • Demonstrated ability to create and cost a saleable package to meet identified needs of a selected target group or individual<br>• Demonstrated ability to produce a set of appropriate and cost-effective marketing strategies to support the introduction and on-going sale of a nominated package.<br>**Context of Assessment**<br>Assessment must ensure:<br>• Actual or simulated workplace application of techniques, strategies and procedures to enable the sourcing of product and service information to enable the development of saleable packages.<br>**Resource Implications**<br>Training and assessment must include the use of real sources of information and systems, both internal and external, including the presence of relevant marketing research information to source products and services that will enable the development of packages to support the operation of the host enterprise; and access to workplace standards, procedures, policies, guidelines, tools and equipment.<br>**Assessment Methods**<br>The following methods may be used to assess competency for this unit:<br>• Observation of practical candidate performance<br>• Project to develop nominated package<br>• Portfolio of research documentation obtained as part of research and sourcing activities<br>• Hard copy description, including itinerary, for a nominated package<br>• Role plays<br>• Oral and written questions<br>• Third party reports completed by a supervisor<br>• Project and assignment work. |

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| | **Key Competencies in this Unit**<br>*Level 1 = competence to undertake tasks effectively*<br>*Level 2 = competence to manage tasks*<br>*Level 3 = competence to use concepts for evaluating* | | |
| | **Key Competencies** | **Level** | **Examples** |
| | Collecting, organising and analysing information | 3 | Capture and evaluate material for potential inclusion in a package |
| | Communicating ideas and information | 2 | Develop supporting informational and promotional material for a package |
| | Planning and organising activities | 3 | Design package; organise arrangements with suppliers, carriers and providers |
| | Working with others and in teams | 2 | Liaise with colleagues, suppliers, carriers and providers to develop package |
| | Using mathematical ideas and techniques | 1 | Calculate costs and price schedules |
| | Solving problems | 2 | Source replacement inclusions and alternate options for package |
| | Using technology | 1 | Use the internet, computerised reservation and automated information systems |

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# Competency Based Training (CBT) and assessment – An introduction for trainers

## Competency

Competency refers to the ability to perform particular tasks and duties to the standard of performance expected in the workplace.

Competency requires the application of specified knowledge, skills and attitudes relevant to effective participation, consistently over time and in the workplace environment.

The essential skills and knowledge are either identified separately or combined.

*Knowledge* identifies what a person needs to know to perform the work in an informed and effective manner.

*Skills* describe the application of knowledge to situations where understanding is converted into a workplace outcome.

*Attitude* describes the founding reasons behind the need for certain knowledge or why skills are performed in a specified manner.

Competency covers all aspects of workplace performance and involves:

- Performing individual tasks
- Managing a range of different tasks
- Responding to contingencies or breakdowns
- Dealing with the responsibilities of the workplace
- Working with others.

### *Unit of competency*

Like with any training qualification or program, a range of subject topics are identified that focus on the ability in a certain work area, responsibility or function.

Each manual focuses on a specific unit of competency that applies in the hospitality workplace.

In this manual a unit of competency is identified as a ‘unit’.

Each unit of competency identifies a discrete workplace requirement and includes:

- Knowledge and skills that underpin competency
- Language, literacy and numeracy
- Occupational safety and health requirements.

Each unit of competency must be adhered to in training and assessment to ensure consistency of outcomes.

### *Element of competency*

An element of competency describes the essential outcomes within a unit of competency.

The elements of competency are the basic building blocks of the unit of competency. They describe in terms of outcomes the significant functions and tasks that make up the competency.

In this manual elements of competency are identified as an 'element'.

### *Performance criteria*

Performance criteria indicate the standard of performance that is required to demonstrate achievement within an element of competency. The standards reflect identified industry skill needs.

Performance criteria will be made up of certain specified skills, knowledge and attitudes.

### *Learning*

For the purpose of this manual learning incorporates two key activities:

- Training
- Assessment.

Both of these activities will be discussed in detail in this introduction.

Today training and assessment can be delivered in a variety of ways. It may be provided to participants:

- On-the-job – in the workplace
- Off-the-job – at an educational institution or dedicated training environment
- As a combination of these two options.

No longer is it necessary for learners to be absent from the workplace for long periods of time in order to obtain recognised and accredited qualifications.

### *Learning approaches*

This manual will identify two avenues to facilitate learning:

Competency Based Training (CBT)

This is the strategy of developing a participant's competency.

Educational institutions utilise a range of training strategies to ensure that participants are able to gain the knowledge and skills required for successful:

- Completion of the training program or qualification
- Implementation in the workplace.

The strategies selected should be chosen based on suitability and the learning styles of participants.


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## Competency Based Assessment (CBA)

This is the strategy of assessing competency of a participant.

Educational institutions utilise a range of assessment strategies to ensure that participants are assessed in a manner that demonstrates validity, fairness, reliability, flexibility and fairness of assessment processes.

### *Flexibility in learning*

It is important to note that flexibility in training and assessment strategies is required to meet the needs of participants who may have learning difficulties. The strategies used will vary, taking into account the needs of individual participants with learning difficulties. However they will be applied in a manner which does not discriminate against the participant or the participant body as a whole.

#### *Catering for participant diversity*

Participants have diverse backgrounds, needs and interests. When planning training and assessment activities to cater for individual differences, trainers and assessors should:

- Consider individuals' experiences, learning styles and interests
- Develop questions and activities that are aimed at different levels of ability
- Modify the expectations for some participants
- Provide opportunities for a variety of forms of participation, such as individual, pair and small group activities
- Assess participants based on individual progress and outcomes.

The diversity among participants also provides a good reason for building up a learning community in which participants support each other's learning.

#### *Participant centred learning*

This involves taking into account structuring training and assessment that:

- *Builds on strengths* – Training environments need to demonstrate the many positive features of local participants (such as the attribution of academic success to effort, and the social nature of achievement motivation) and of their trainers (such as a strong emphasis on subject disciplines and moral responsibility). These strengths and uniqueness of local participants and trainers should be acknowledged and treasured
- *Acknowledges prior knowledge and experience* – The learning activities should be planned with participants' prior knowledge and experience in mind
- *Understands learning objectives* – Each learning activity should have clear learning objectives and participants should be informed of them at the outset. Trainers should also be clear about the purpose of assignments and explain their significance to participants
- *Teaches for understanding* – The pedagogies chosen should aim at enabling participants to act and think flexibly with what they know
- *Teaches for independent learning* – Generic skills and reflection should be nurtured through learning activities in appropriate contexts of the curriculum. Participants should be encouraged to take responsibility for their own learning

- *Enhances motivation* – Learning is most effective when participants are motivated. Various strategies should be used to arouse the interest of participants
- *Makes effective use of resources* – A variety of teaching resources can be employed as tools for learning
- *Maximises engagement* – In conducting learning activities, it is important for the minds of participants to be actively engaged
- *Aligns assessment with learning and teaching* – Feedback and assessment should be an integral part of learning and teaching
- *Caters for learner diversity* – Trainers should be aware that participants have different characteristics and strengths and try to nurture these rather than impose a standard set of expectations.

***Active learning***

The goal of nurturing independent learning in participants does not imply that they always have to work in isolation or solely in a classroom. On the contrary, the construction of knowledge in tourism and hospitality studies can often best be carried out in collaboration with others in the field. Sharing experiences, insights and views on issues of common concern, and working together to collect information through conducting investigative studies in the field (active learning) can contribute a lot to their eventual success.

Active learning has an important part to play in fostering a sense of community in the class. First, to operate successfully, a learning community requires an ethos of acceptance and a sense of trust among participants, and between them and their trainers. Trainers can help to foster acceptance and trust through encouragement and personal example, and by allowing participants to take risks as they explore and articulate their views, however immature these may appear to be. Participants also come to realise that their classmates (and their trainers) are partners in learning and solving.

Trainers can also encourage cooperative learning by designing appropriate group learning tasks, which include, for example, collecting background information, conducting small-scale surveys, or producing media presentations on certain issues and themes. Participants need to be reminded that, while they should work towards successful completion of the field tasks, developing positive peer relationships in the process is an important objective of all group work.

## *Competency Based Training (CBT)*

### Principle of Competency Based Training

Competency based training is aimed at developing the knowledge, skills and attitudes of participants, through a variety of training tools.

### Training strategies

The aims of this curriculum are to enable participants to:

- Undertake a variety of subject courses that are relevant to industry in the current environment
- Learn current industry skills, information and trends relevant to industry
- Learn through a range of practical and theoretical approaches
- Be able to identify, explore and solve issues in a productive manner


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- Be able to become confident, equipped and flexible managers of the future
- Be 'job ready' and a valuable employee in the industry upon graduation of any qualification level.

To ensure participants are able to gain the knowledge and skills required to meet competency in each unit of competency in the qualification, a range of training delivery modes are used.

**Types of training**

In choosing learning and teaching strategies, trainers should take into account the practical, complex and multi-disciplinary nature of the subject area, as well as their participant's prior knowledge, learning styles and abilities.

Training outcomes can be attained by utilising one or more delivery methods:

***Lecture/tutorial***

This is a common method of training involving transfer of information from the trainer to the participants. It is an effective approach to introduce new concepts or information to the learners and also to build upon the existing knowledge. The listener is expected to reflect on the subject and seek clarifications on the doubts.

***Demonstration***

Demonstration is a very effective training method that involves a trainer showing a participant how to perform a task or activity. Through a visual demonstration, trainers may also explain reasoning behind certain actions or provide supplementary information to help facilitate understanding.

***Group discussions***

Brainstorming in which all the members in a group express their ideas, views and opinions on a given topic. It is a free flow and exchange of knowledge among the participants and the trainer. The discussion is carried out by the group on the basis of their own experience, perceptions and values. This will facilitate acquiring new knowledge. When everybody is expected to participate in the group discussion, even the introverted persons will also get stimulated and try to articulate their feelings.

The ideas that emerge in the discussions should be noted down and presentations are to be made by the groups. Sometimes consensus needs to be arrived at on a given topic. Group discussions are to be held under the moderation of a leader guided by the trainer. Group discussion technique triggers thinking process, encourages interactions and enhances communication skills.

***Role play***

This is a common and very effective method of bringing into the classroom real life situations, which may not otherwise be possible. Participants are made to enact a particular role so as to give a real feel of the roles they may be called upon to play. This enables participants to understand the behaviour of others as well as their own emotions and feelings. The instructor must brief the role players on what is expected of them. The role player may either be given a ready-made script, which they can memorize and enact, or they may be required to develop their own scripts around a given situation. This technique is extremely useful in understanding creative selling techniques and human relations. It can be entertaining and energizing and it helps the reserved and less literate to express their feelings.

***Simulation games***

When trainees need to become aware of something that they have not been conscious of, simulations can be a useful mechanism. Simulation games are a method based on "here and now" experience shared by all the participants. The games focus on the participation of the trainees and their willingness to share their ideas with others. A "near real life" situation is created providing an opportunity to which they apply themselves by adopting certain behaviour. They then experience the impact of their behaviour on the situation. It is carried out to generate responses and reactions based on the real feelings of the participants, which are subsequently analysed by the trainer.

While use of simulation games can result in very effective learning, it needs considerable trainer competence to analyse the situations.

***Individual /group exercises***

Exercises are often introduced to find out how much the participant has assimilated. This method involves imparting instructions to participants on a particular subject through use of written exercises. In the group exercises, the entire class is divided into small groups, and members are asked to collaborate to arrive at a consensus or solution to a problem.

***Case study***

This is a training method that enables the trainer and the participant to experience a real life situation. It may be on account of events in the past or situations in the present, in which there may be one or more problems to be solved and decisions to be taken. The basic objective of a case study is to help participants diagnose, analyse and/or solve a particular problem and to make them internalize the critical inputs delivered in the training. Questions are generally given at the end of the case study to direct the participants and to stimulate their thinking towards possible solutions. Studies may be presented in written or verbal form.

***Field visit***

This involves a carefully planned visit or tour to a place of learning or interest. The idea is to give first-hand knowledge by personal observation of field situations, and to relate theory with practice. The emphasis is on observing, exploring, asking questions and understanding. The trainer should remember to brief the participants about what they should observe and about the customs and norms that need to be respected.

***Group presentation***

The participants are asked to work in groups and produce the results and findings of their group work to the members of another sub-group. By this method participants get a good picture of each other's views and perceptions on the topic and they are able to compare them with their own point of view. The pooling and sharing of findings enriches the discussion and learning process.

***Practice sessions***

This method is of paramount importance for skills training. Participants are provided with an opportunity to practice in a controlled situation what they have learnt. It could be real life or through a make-believe situation.


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### *Games*

This is a group process and includes those methods that involve usually fun-based activity, aimed at conveying feelings and experiences, which are everyday in nature, and applying them within the game being played. A game has set rules and regulations, and may or may not include a competitive element. After the game is played, it is essential that the participants be debriefed and their lessons and experiences consolidated by the trainer.

### *Research*

Trainers may require learners to undertake research activities, including online research, to gather information or further understanding about a specific subject area.

## *Competency Based Assessment (CBA)*

### Principle of Competency Based Assessment

Competency based assessment is aimed at compiling a list of evidence that shows that a person is competent in a particular unit of competency.

Competencies are gained through a multitude of ways including:

- Training and development programs
- Formal education
- Life experience
- Apprenticeships
- On-the-job experience
- Self-help programs.

All of these together contribute to job competence in a person. Ultimately, assessors and participants work together, through the 'collection of evidence' in determining overall competence.

This evidence can be collected:

- Using different formats
- Using different people
- Collected over a period of time.

The assessor who is ideally someone with considerable experience in the area being assessed, reviews the evidence and verifies the person as being competent or not.

### Flexibility in assessment

Whilst allocated assessment tools have been identified for this subject, all attempts are made to determine competency and suitable alternate assessment tools may be used, according to the requirements of the participant.

The assessment needs to be equitable for all participants, taking into account their cultural and linguistic needs.

Competency must be proven regardless of:

- Language
- Delivery Method
- Assessment Method.

**Assessment objectives**

The assessment tools used for subjects are designed to determine competency against the 'elements of competency' and their associated 'performance criteria'.

The assessment tools are used to identify sufficient:

a) Knowledge, including underpinning knowledge

b) Skills

c) Attitudes

Assessment tools are activities that trainees are required to undertake to prove participant competency in this subject.

All assessments must be completed satisfactorily for participants to obtain competence in this subject. There are no exceptions to this requirement, however, it is possible that in some cases several assessment items may be combined and assessed together.

**Types of assessment**

*Allocated Assessment Tools*

There are a number of assessment tools that are used to determine competency in this subject:

- Work projects
- Written questions
- Oral questions
- Third Party Report
- Observation Checklist.

Instructions on how assessors should conduct these assessment methods are explained in the Assessment Manuals.

*Alternative assessment tools*

Whilst this subject has identified assessment tools, as indicated above, this does not restrict the assessor from using different assessment methods to measure the competency of a participant.

Evidence is simply proof that the assessor gathers to show participants can actually do what they are required to do.

Whilst there is a distinct requirement for participants to demonstrate competency, there are many and diverse sources of evidence available to the assessor.

Ongoing performance at work, as verified by a supervisor or physical evidence, can count towards assessment. Additionally, the assessor can talk to customers or work colleagues to gather evidence about performance.


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A range of assessment methods to assess competency include:

- Practical demonstrations
- Practical demonstrations in simulated work conditions
- Problem solving
- Portfolios of evidence
- Critical incident reports
- Journals
- Oral presentations
- Interviews
- Videos
- Visuals: slides, audio tapes
- Case studies
- Log books
- Projects
- Role plays
- Group projects
- Group discussions
- Examinations.

**Recognition of Prior Learning**

Recognition of Prior Learning is the process that gives current industry professionals who do not have a formal qualification, the opportunity to benchmark their extensive skills and experience against the standards set out in each unit of competency/subject.

Also known as a Skills Recognition Audit (SRA), this process is a learning and assessment pathway which encompasses:

- Recognition of Current Competencies (RCC)
- Skills auditing
- Gap analysis and training
- Credit transfer.

**Assessing competency**

As mentioned, assessment is the process of identifying a participant's current knowledge, skills and attitudes sets against all elements of competency within a unit of competency. Traditionally in education, grades or marks were given to participants, dependent on how many questions the participant successfully answered in an assessment tool.

Competency based assessment does not award grades, but simply identifies if the participant has the knowledge, skills and attitudes to undertake the required task to the specified standard.

Therefore, when assessing competency, an assessor has two possible results that can be awarded:

- Pass Competent (PC)
- Not Yet Competent (NYC).

*Pass Competent (PC)*

If the participant is able to successfully answer or demonstrate what is required, to the expected standards of the performance criteria, they will be deemed as 'Pass Competent' (PC).

The assessor will award a 'Pass Competent' (PC) if they feel the participant has the necessary knowledge, skills and attitudes in all assessment tasks for a unit.

*Not Yet Competent' (NYC)*

If the participant is unable to answer or demonstrate competency to the desired standard, they will be deemed to be 'Not Yet Competent' (NYC).

This does not mean the participant will need to complete all the assessment tasks again. The focus will be on the specific assessment tasks that were not performed to the expected standards.

The participant may be required to:

a) Undertake further training or instruction

b) Undertake the assessment task again until they are deemed to be 'Pass Competent'.


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# Competency standard

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| **UNIT TITLE:** SOURCE AND PACKAGE TOURISM PRODUCTS AND SERVICES | **NOMINAL HOURS:** 70 |
| **UNIT NUMBER:** D2.TCS.CL5.22 D2.TTA.CL2.18 | |
| **UNIT DESCRIPTOR:** This unit deals with skills and knowledge required to source and evaluate products and services for inclusion into packages for sale to individual and/or generic groups of clients. | |

| **ELEMENTS AND PERFORMANCE CRITERIA** | **UNIT VARIABLE AND ASSESSMENT GUIDE** |
|---|---|
| **Element 1: Describe the context for packages**<br>**1.1** Identify the *clients for packages*<br>**1.2** Identify *client requirements* in relation to packages<br>**1.3** Identify *host enterprise requirements* in relation to packages<br>**1.4** Identify *purposes of packages*<br>**1.5** Identify *products and services* for inclusion in packages<br>**Element 2: Source products and services for packages**<br>**2.1** Identify *sources of information* for products and services<br>**2.2** *Research information sources* to obtain targeted information<br>**2.3** *Assess applicability of identified products and services* to proposed packages<br>**2.4** *Select products and services* for the package | **Unit Variables**<br>The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment.<br>This unit applies to sourcing and evaluating products and services for inclusion in packages for sale to individual and/or generic groups of clients within the labour divisions of the hotel and travel industries and may include:<br>1. Travel Agencies<br>2. Tour Operation<br>*Clients for packages* may include:<br>• Individuals and groups, including one-off clients and identified target market sectors<br>• Day tour operators<br>• Hotels<br>• Outbound tour wholesalers<br>• Inbound tour operators<br>• Conference organisers. |

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| **Element 3: Create packages of products and services**<br>**3.1** Identify *pre-planning requirements* for packages<br>**3.2** Determine *components* of individual packages<br>**3.3** *Determine duration for packages*<br>**3.4** *Calculate price points* for packages<br>**3.5** Develop *terms and conditions* for the packages<br>**3.6** Prepare *draft itinerary* for packages<br>**3.7** *Prepare sales monitoring arrangements* for packages<br>**3.8** *Plan marketing activities* for packages | *Client requirements* must focus on identified client needs, wants and preferences and will include:<br>• Destination preferences<br>• Budget<br>• Timing and duration issues, including constraints and the need for integration with an associated tour or travel program<br>• Cultural and religious issues<br>• Product and service preferences<br>• Practicality<br>• Service styles and standards<br>• Identified focus for undertaking the trip.<br>*Host enterprise requirements* may be related to:<br>• Enhancing and expanding product range including product initiatives that conform to business plan and marketing objectives<br>• Profitability<br>• Movement into new target markets<br>• Reputation and image<br>• Business agreements, including franchise and other contractual arrangements<br>• Meeting competition<br>• Involvement of colleagues in determining requirements.<br>*Purposes of packages* may include:<br>• Conferences<br>• Social events<br>• Holidays and recreation |


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| | • Tour programs including day tours, extended tours, eco-tours, cultural tours and educational tours<br>• Special interest itineraries<br>• Incentives<br>• Series tours.<br>*Products and services* may relate to supplier, intermediary and/or touring packages promoted in brochures and include:<br>• Accommodation including serviced and non-serviced options<br>• Transport including air, rail, bus/coach and shipping<br>• Hire car including long and short-term rentals<br>• Attractions including natural and man-made<br>• Tours including side trips, one-day and extended tours<br>• Catering including bona fide meals and refreshments<br>• Entertainment including recreational, arts, sports, cultural, music, festivals, and special events<br>• Conference facilities<br>• Specialist services including guides, interpreters, secretarial support, child-minding and security.<br>*Sources of information* may include:<br>• Suppliers, carriers and providers, including those in distribution networks<br>• Local tourism information centres<br>• Embassies in identified locations/destinations<br>• Local operators including accommodation properties, tours, venues, restaurants and souvenir shops<br>• Tourism authorities including regional, domestic and international |

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| | • Industry associations including industry peak bodies and government authorities and agencies<br>• General literature including trade press, guide books, holiday and destination publications<br>• Internet<br>• Media<br>• Personal visits to destinations and site inspections of attractions, venues and facilities.<br>*Research information sources* may include:<br>• Undertaking desktop research including internet research and analysis of internal data contained on in-house systems<br>• Analysing existing secondary data including:<br>▪ Domestic and international visitor statistics on departures, expenditure, visitor nights<br>▪ Visitor profiles including tourist origins, volume, purpose of trip, seasonality, accommodation, transport and expenditure<br>▪ Industry and government research reports on industry trends, current development activity and forecasts of future developments<br>▪ Client feedback<br>▪ Feasibility studies for new developments or products<br>▪ Responses to surveys, questionnaires on preferences, needs and current tourist activities<br>• Conducting formal qualitative and quantitative market research including focus groups, surveys and questionnaires to generate primary research data<br>• Considering recent and emerging trends<br>• Using personal network of contacts<br>• Visiting providers, carriers and suppliers<br>• Undertaking personal observation<br>• Soliciting feedback from clients. |


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| | *Assess applicability of identified products and services* may relate to:<br>• Determining rates, costs, fees, charges, taxes for each package component<br>• Evaluating availability on a short-term and on-going basis, as required by the nature of the package<br>• Calculating return on investment, including consideration of loss leader implications<br>• Assessing compatibility with company image and reputation<br>• Verifying reputation of products and services, including assessment of client perceptions in relation to potential carriers, suppliers, destinations, products and services<br>• Identifying features and benefits, including comparisons with similar packages offered by competitors<br>• Checking match between products/services and identified objectives and client demand/requests for the package<br>• Determining destination characteristics, including accessibility and transport, accommodation and attractions, facilities, seasonal influences, degree of infrastructure, government regulations, special events, supporting venues and human resource potential to deliver required services, promotional potential, existing promotional material, retail outlets and ancillary support services<br>• Legal considerations<br>• Cultural sensitivity.<br>*Select products and services* may include:<br>• Aligning with identified objectives<br>• Complying with client requirements<br>• Ensuring availability<br>• Negotiating agreements with suppliers, carriers and providers – including obtaining written confirmation<br>• Ensuring value and potential saleability. |

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| | *Pre-planning requirements* may relate to:<br>• Seasonal influences<br>• Dates of one-off events<br>• Client demand<br>• Position of other packages in terms of product life-cycle<br>• Activities being undertaken by the competition.<br>*Components* refers to the products and services for individual packages and will relate to:<br>• Inclusion<br>• Exclusions<br>• Add-ons<br>• Available options, including substitutions and alternatives, where applicable.<br>*Determine duration for packages* may include:<br>• Formulating packages to accommodate differing timelines in order to meet identified client need<br>• Adding and removing inclusions to enable attainment of required duration while still delivering value and enabling saleability of package.<br>• Complying with agreed arrangements with suppliers, providers and carriers.<br>*Calculate price points* may include:<br>• Analysing prices offered by competition<br>• Determining target market affordability<br>• Ensuring required profit to host enterprise<br>• Identifying what the market will bear<br>• Developing price schedules, including special rates and discounts<br>• Determining host enterprise costs pertaining to package development and delivery<br>• Factoring in commissions. |


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| | *Terms and conditions* may relate to:<br>• Deposits and full/final payments<br>• Fees and charges, including penalties, terms of payment and timelines for payment<br>• Commissions due or payable<br>• Cancellations and alterations, including timelines and charges<br>• Limitation of liability<br>• Guarantees and warranties<br>• Complaint handling.<br>*Draft itinerary* may include:<br>• Day destinations<br>• Times<br>• Destinations<br>• Attractions, tours and sight-seeing<br>• Arranged activities<br>• Accommodation<br>• Transport<br>• Transfers.<br>*Prepare sales monitoring arrangements* may include:<br>• Establishing facilities to record enquiries in relation to packages<br>• Establishing internal systems to record package sales, including location of sale, seller, commissions and options selected<br>• Arranging for sales data to be forwarded from related businesses. |

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| | *Plan marketing activities* may include:<br>• Organising the launch of the packages<br>• Preparation of point-of-sales advertising material<br>• Organising media promotions, including advertisements, events and competitions<br>• Training sales staff in relation to the packages<br>• Designing client feedback tools.<br>**Assessment Guide**<br>The following skills and knowledge must be assessed as part of this unit:<br>• Enterprise policies and procedures in regard to developing packages and entering into agreements with suppliers, providers and carriers including the use of preferred suppliers/providers<br>• Packaging rules as appropriate to the host enterprise and the requirements of allied organisations<br>• Ability to use research, negotiation and analytical techniques<br>• Domestic and international rules, regulations, legislation and practices that apply to package formulation<br>• General industry knowledge of destinations, transport options, accommodation and potential for package-related inclusions suitable for a range of package types.<br>**Linkages To Other Units**<br>• Access and retrieve computer-based data<br>• Maintain hospitality industry knowledge<br>• Establish and maintain a business relationship<br>• Develop a marketing strategy and coordinate sales activities<br>• Develop new products and services<br>• Gather and present product information |


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| | • Use common business tools and technology<br>• Access and interpret product information<br>• Maintain product information inventory<br>• Source and provide destination information and advice<br>• Maintain contacts with handling agents<br>• Construct and apply tourism product research<br>• Co-ordinate production of brochures and marketing materials<br>• Prepare and submit quotations<br>• Manage and monitor innovative tourism programs and projects<br>• Source and present information.<br>**Critical Aspects of Assessment**<br>Evidence of the following is essential:<br>• Understanding of rules, regulations, legislation, policies and procedures applicable to package development within the host enterprise<br>• Demonstrated ability to source inclusions for a nominated package type to meet identified needs of a selected target group or individual<br>• Demonstrated ability to create and cost a saleable package to meet identified needs of a selected target group or individual<br>• Demonstrated ability to produce a set of appropriate and cost-effective marketing strategies to support the introduction and on-going sale of a nominated package.<br>**Context of Assessment**<br>Assessment must ensure:<br>• Actual or simulated workplace application of techniques, strategies and procedures to enable the sourcing of product and service information to enable the development of saleable packages. |

**Resource Implications**

Training and assessment must include the use of real sources of information and systems, both internal and external, including the presence of relevant marketing research information to source products and services that will enable the development of packages to support the operation of the host enterprise; and access to workplace standards, procedures, policies, guidelines, tools and equipment.

**Assessment Methods**

The following methods may be used to assess competency for this unit:

- Observation of practical candidate performance
- Project to develop nominated package
- Portfolio of research documentation obtained as part of research and sourcing activities
- Hard copy description, including itinerary, for a nominated package
- Role plays
- Oral and written questions
- Third party reports completed by a supervisor
- Project and assignment work.

**Key Competencies in this Unit**

*Level 1 = competence to undertake tasks effectively*

*Level 2 = competence to manage tasks*

*Level 3 = competence to use concepts for evaluating*

| **Key Competencies** | **Level** | **Examples** |
|---|---|---|
| Collecting, organising and analysing information | 3 | Capture and evaluate material for potential inclusion in a package |
| Communicating ideas and information | 2 | Develop supporting informational and promotional material for a package |


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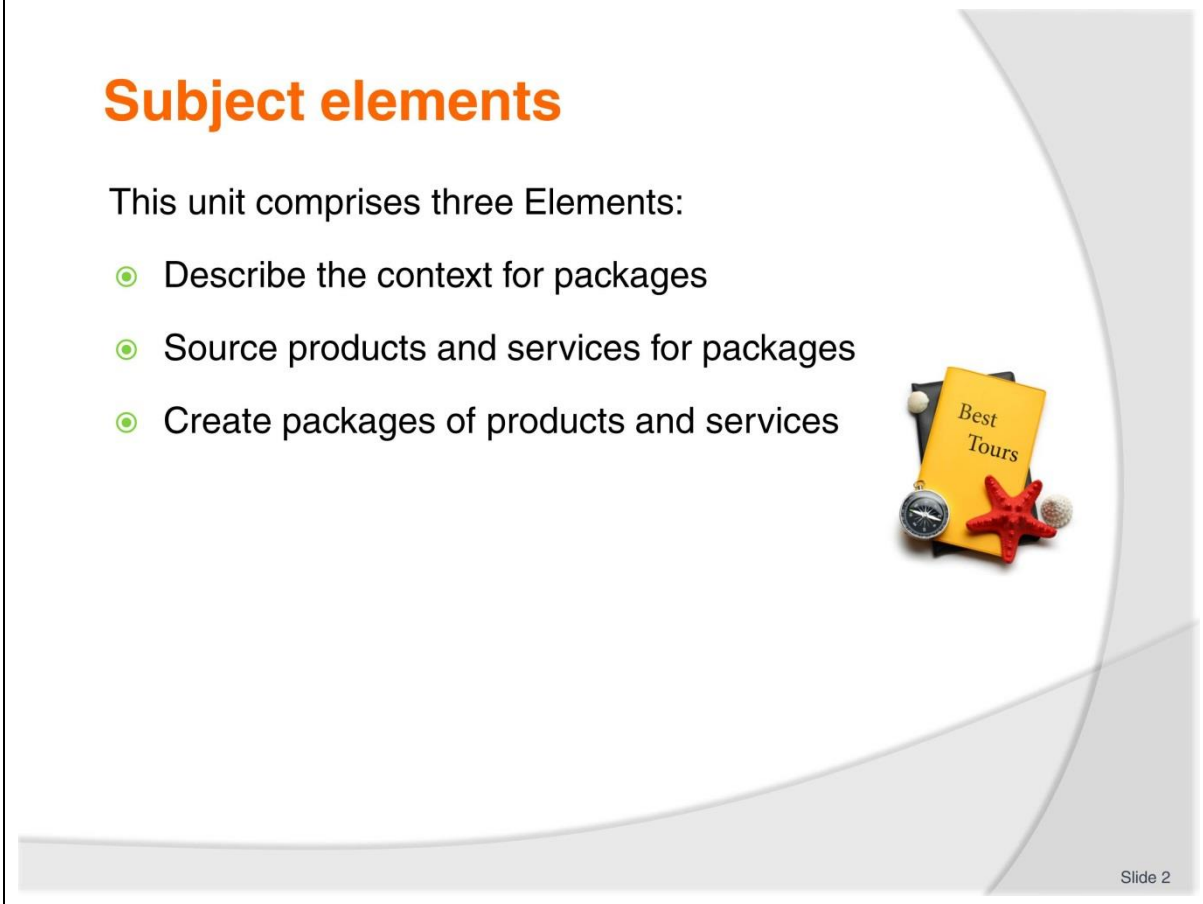
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| | Planning and organising activities | 3 | Design package; organise arrangements with suppliers, carriers and providers |
| | Working with others and in teams | 2 | Liaise with colleagues, suppliers, carriers and providers to develop package |
| | Using mathematical ideas and techniques | 1 | Calculate costs and price schedules |
| | Solving problems | 2 | Source replacement inclusions and alternate options for package |
| | Using technology | 1 | Use the internet, computerised reservation and automated information systems |

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# Notes and PowerPoint slides

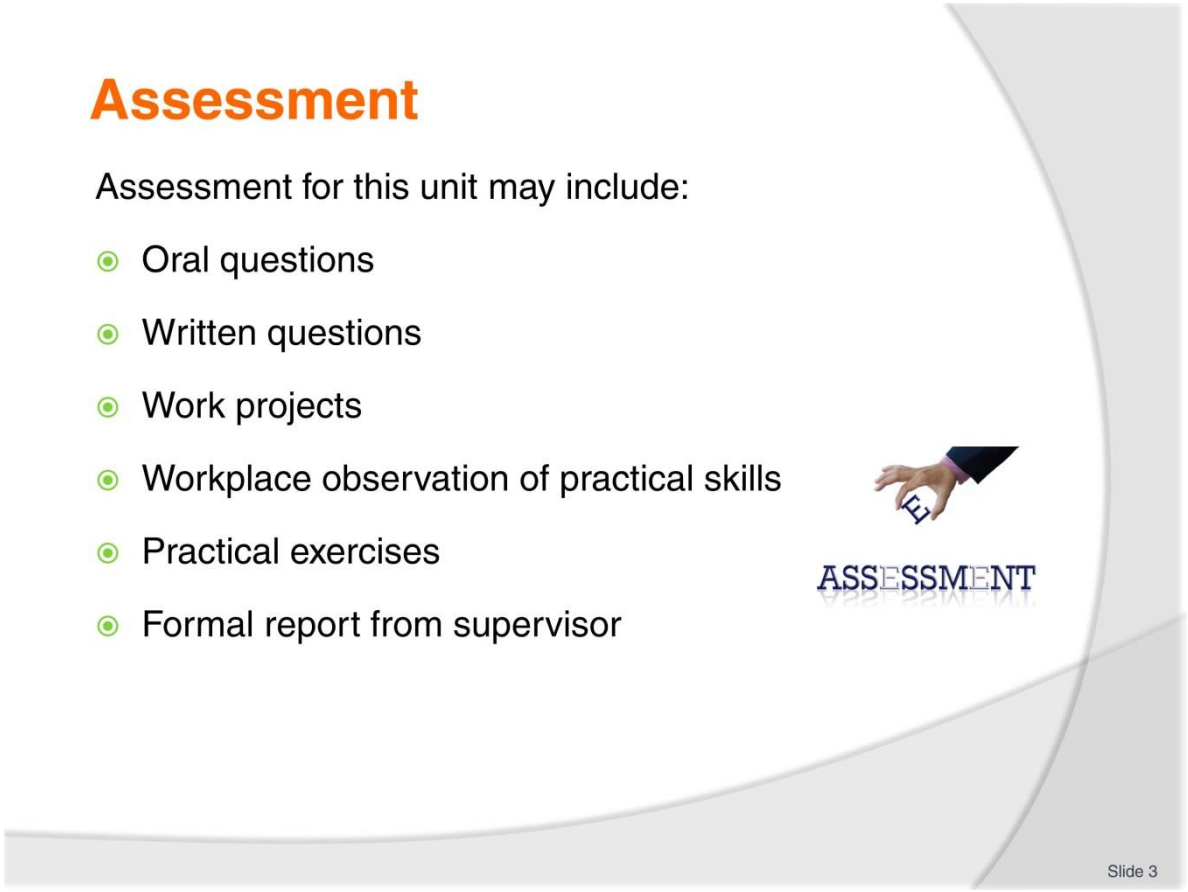
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| Slide No | Trainer Notes |
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| 1. | Trainer welcomes students to class. |

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| 2. | Trainer advises this Unit comprises three Elements, as listed on the slide explaining:<br>• Each Element comprises a number of Performance Criteria which will be identified throughout the class and explained in detail<br>• Trainees can obtain more detail from their Trainee Manual<br>• At times the course presents advice and information about various protocols but where their workplace requirements differ to what is presented, the workplace practices and standards, as well as policies and procedures must be observed. |


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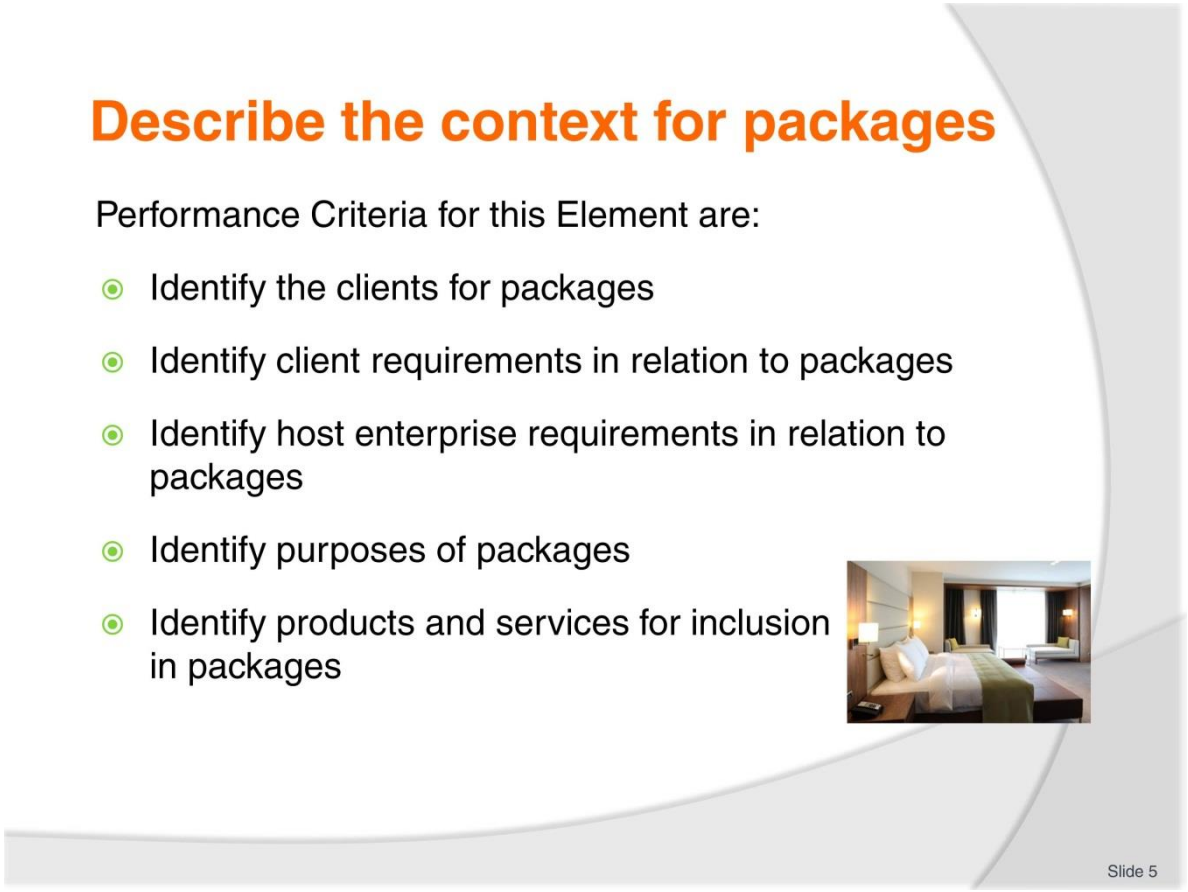
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| 3. | Trainer advises that assessment for this Unit may take several forms all of which are aimed at verifying they have achieved competency for the Unit as required.<br>Trainer indicates the methods of assessment that will be applied to them for this Unit. |

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| 4. | Introduce topic.<br>**Class Activity – General Discussion**<br>Ask general questions:<br>• What is a ‘package’?<br>• What is included in a package?<br>• What are the benefits of packages? |


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| 5. | Trainer identifies the Performance Criteria for this Element, as listed on the slide. |

**Slide**




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| 6. | **Class activity – Discussion**<br>• Who provides tour packages?<br>• What types of packages exist? |


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| 7. | **Class activity – Personal reflection of tour packages**<br>• Audience to reflect on tour packages they have taken in the past<br>• Discuss the types of packages in today's world. |

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| 8. | **Class activity – Discussion**<br>• What is included in a tourism package? |

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| 9. | **Class activity – Discussion**<br>• Provide examples of each type of component. |

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| 10. | **Class activity – Discussion & Activity**<br>• Provide examples of each type of component<br>• Complete Activity 1. |


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| 11. | **Class activity – Discussion**<br>• Provide examples of each type of client<br>• What are their needs? |

**Slide**



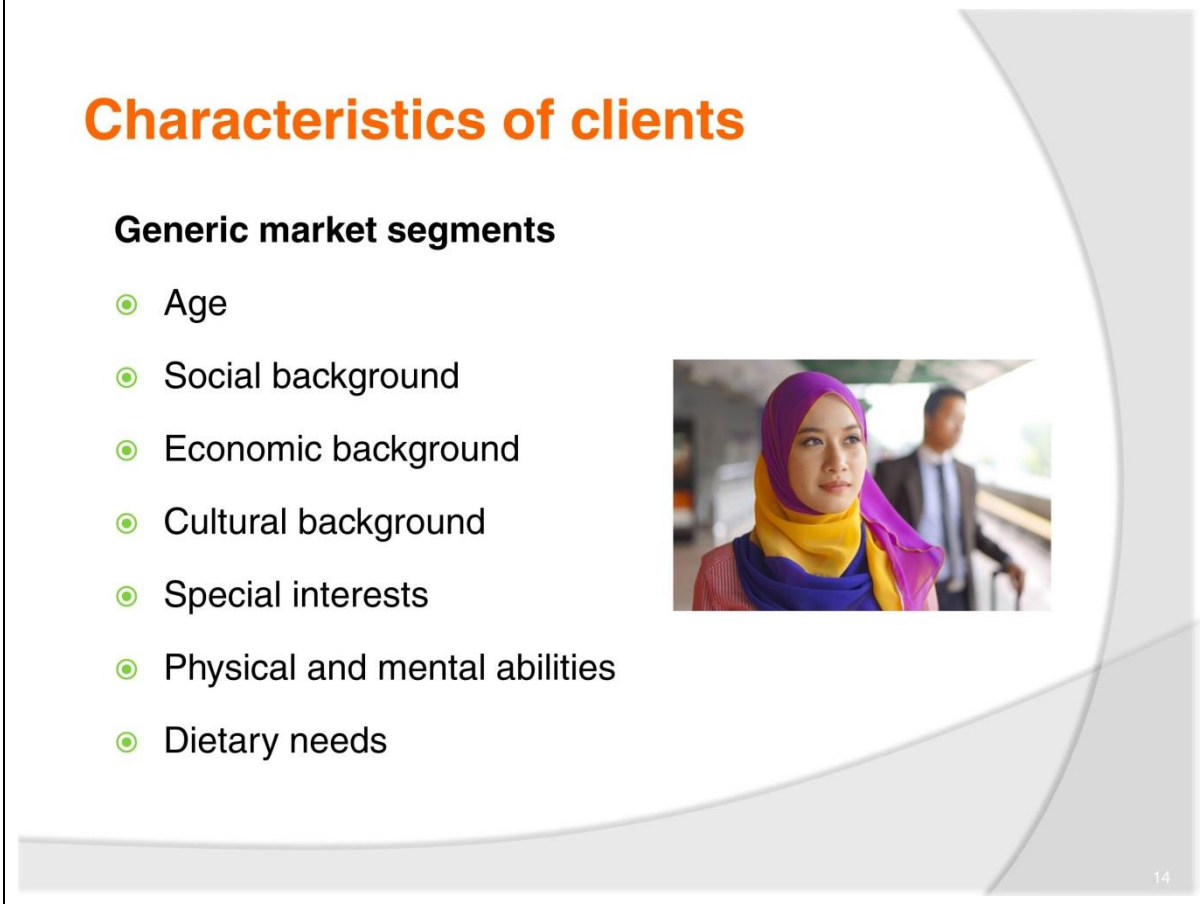

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| 12. | **Class activity – Discussion**<br>• How do these tourism operators make packages? |


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| 13. | **Class activity – Discussion**<br>• What are examples of different market segments?<br>• What are characteristics of these segments? |

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| 14. | **Class activity – Discussion**<br>• What are examples of subcategories for these different market segments? |


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| 15. | **Class activity – Discussion**<br>• What are examples of subcategories for these different market segments?<br>• What are their needs? |

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| 16. | **Class activity – Discussion**<br>• How can you identifying client requirements? |


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| 17. | **Class activity – Discussion**<br>• Discuss the questions in the slide<br>• Provide examples of each. |

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| 18. | **Class activity – Discussion**<br>• Discuss these needs?<br>• How can you cater to these? |


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| 19. | **Class activity – Discussion**<br>• Discuss these needs?<br>• How can you cater to these? |

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| 20. | **Class activity – Discussion**<br>• What are the needs for each of these customer types?<br>• Discuss these needs?<br>• How can you cater to these? |


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| 21. | **Class activity – Discussion & Activity**<br>• How can you accommodate these needs when designing packages?<br>• Complete Activity 2. |

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| 22. | **Class activity – Discussion**<br>• Discuss the questions in the slide. |


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| 23. | **Class activity – Discussion**<br>• What are examples of trends for each of these points?<br>• How can these trends affect tour packages that may be created?<br>• Identify packages based on these trends? |

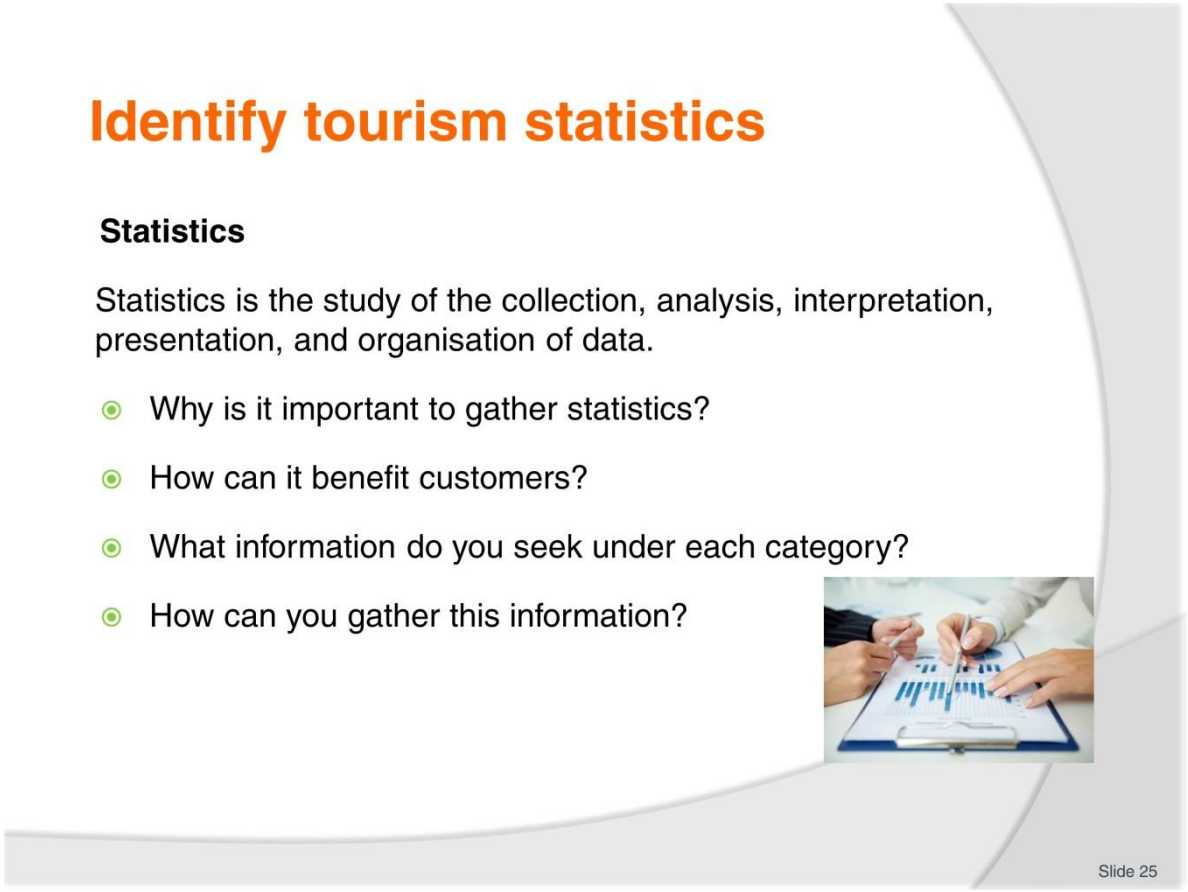
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| 24. | **Class activity – Discussion**<br>• What are examples of trends for each of these points?<br>• How can these trends affect tour packages that may be created?<br>• Identify packages based on these trends? |

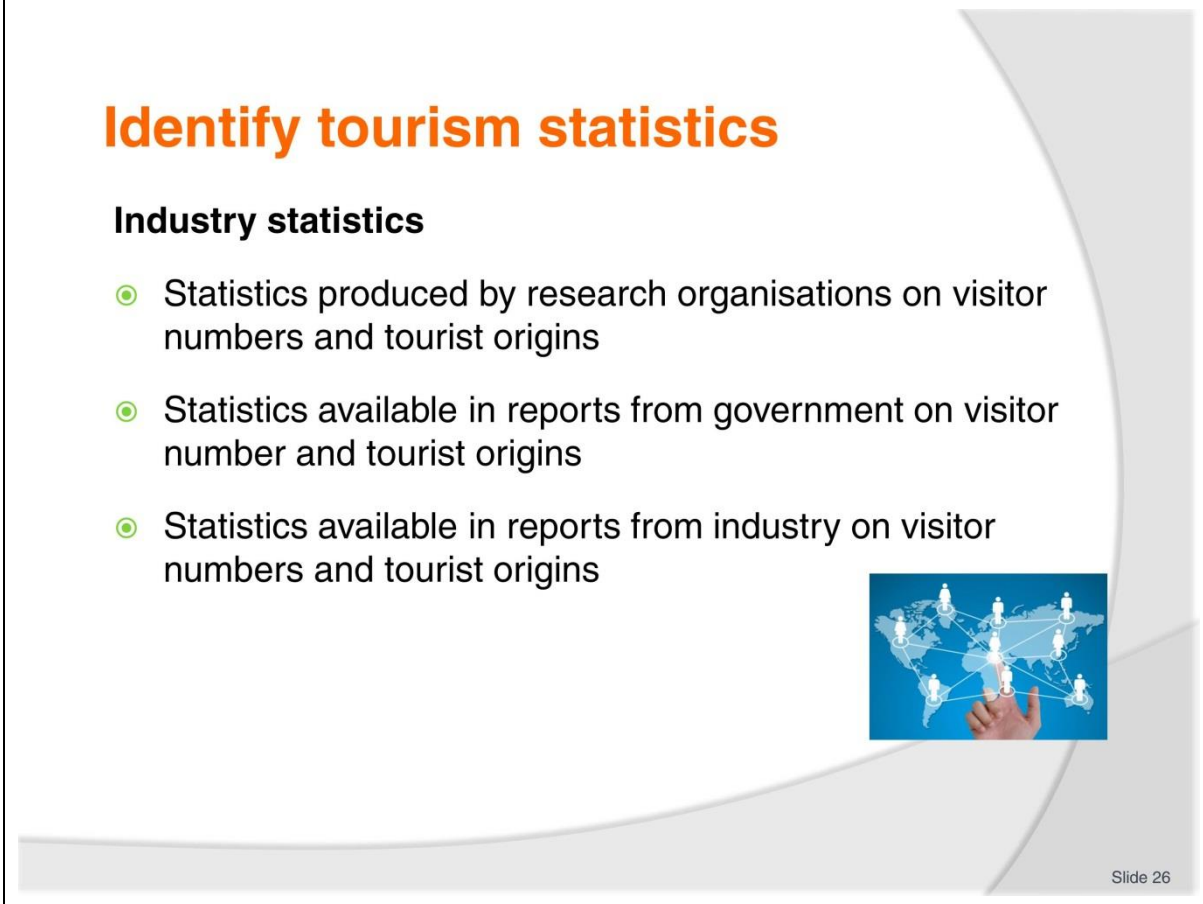

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| 25. | **Class Activity – Identify importance of tourism statistics**<br>• Discuss questions in the slide. |

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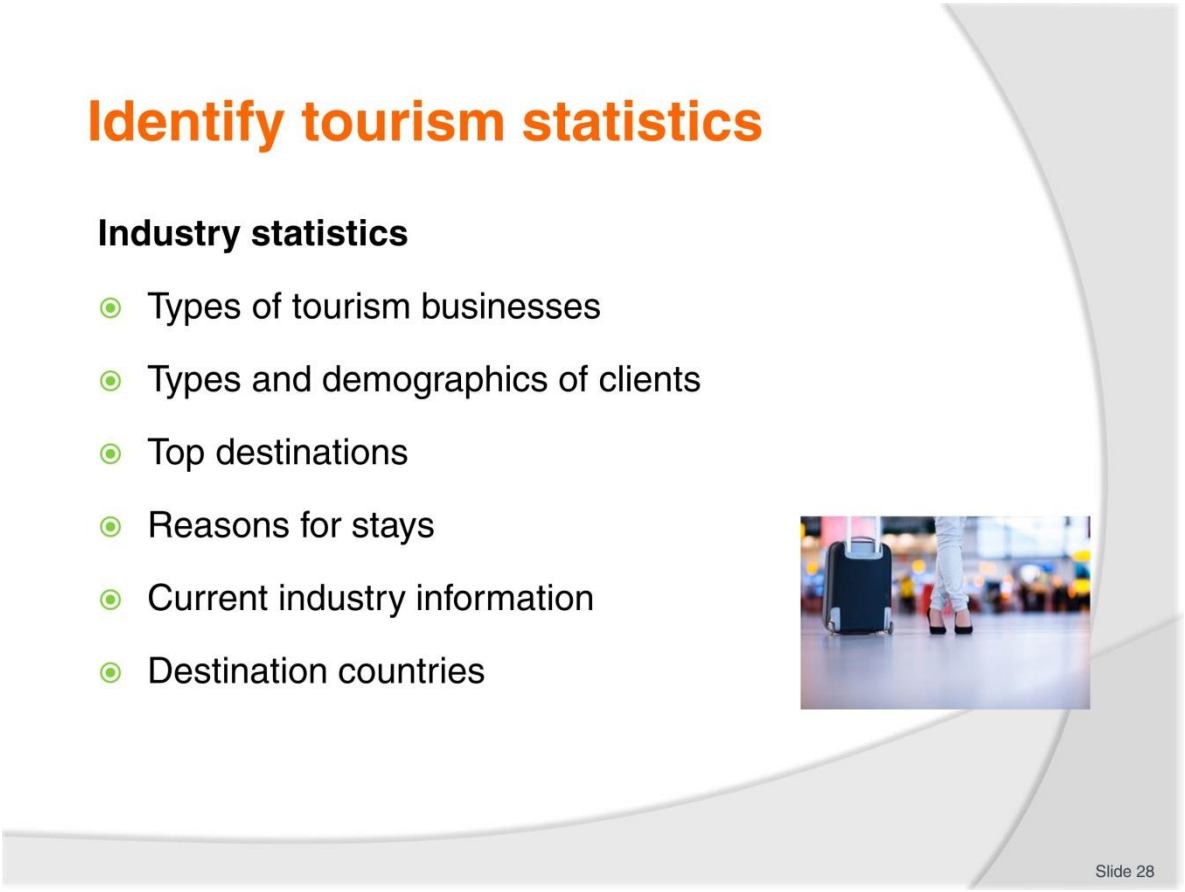

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| 26. | **Class Activity – Identify importance of tourism industry statistics**<br>• What information do you seek under each category?<br>• How can you gather this information? |


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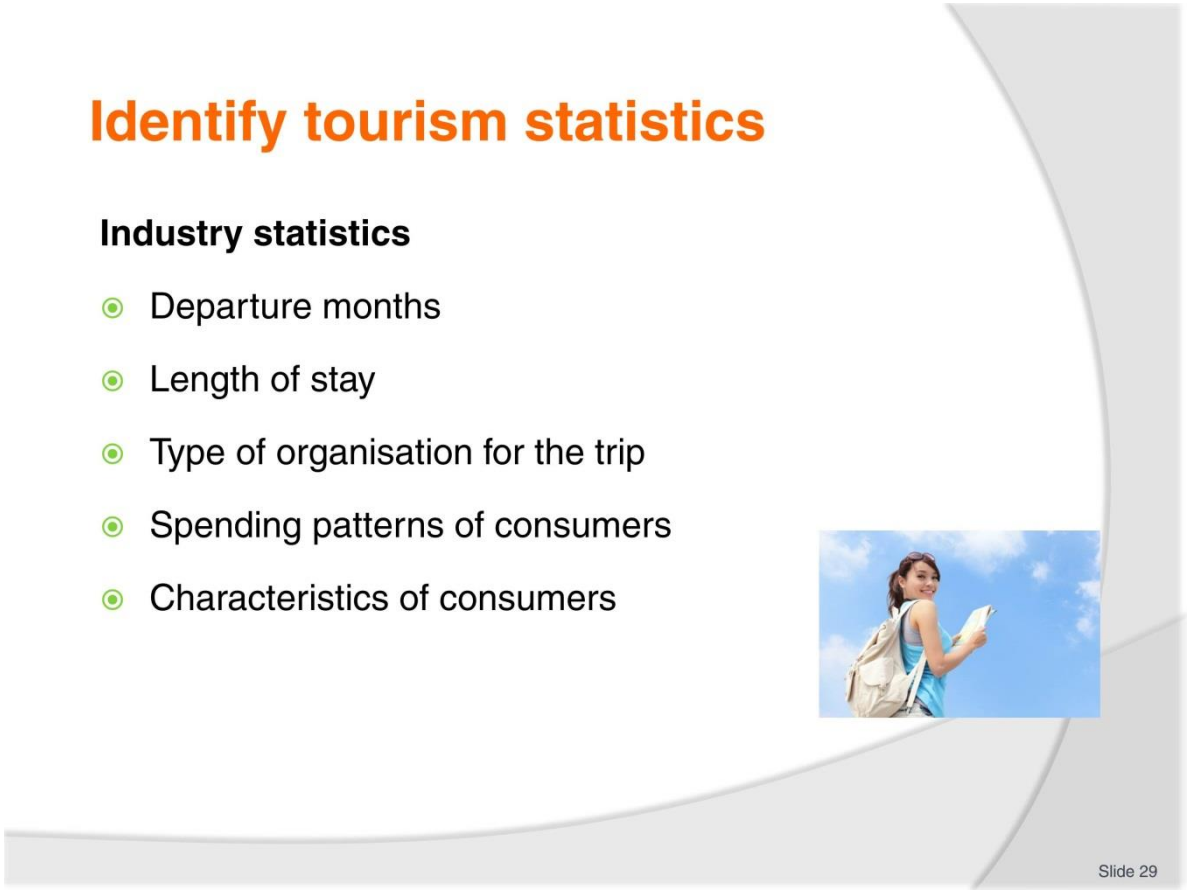
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| 27. | **Class Activity – Identify importance of tourism industry statistics**<br>• What information do you seek under each category?<br>• How can you gather this information? |

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| 28. | **Class Activity – Identify importance of tourism industry statistics**<br>• What information do you seek under each category?<br>• How can you gather this information? |


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| 29. | **Class Activity – Identify importance of tourism industry statistics**<br>• What information do you seek under each category?<br>• How can you gather this information? |

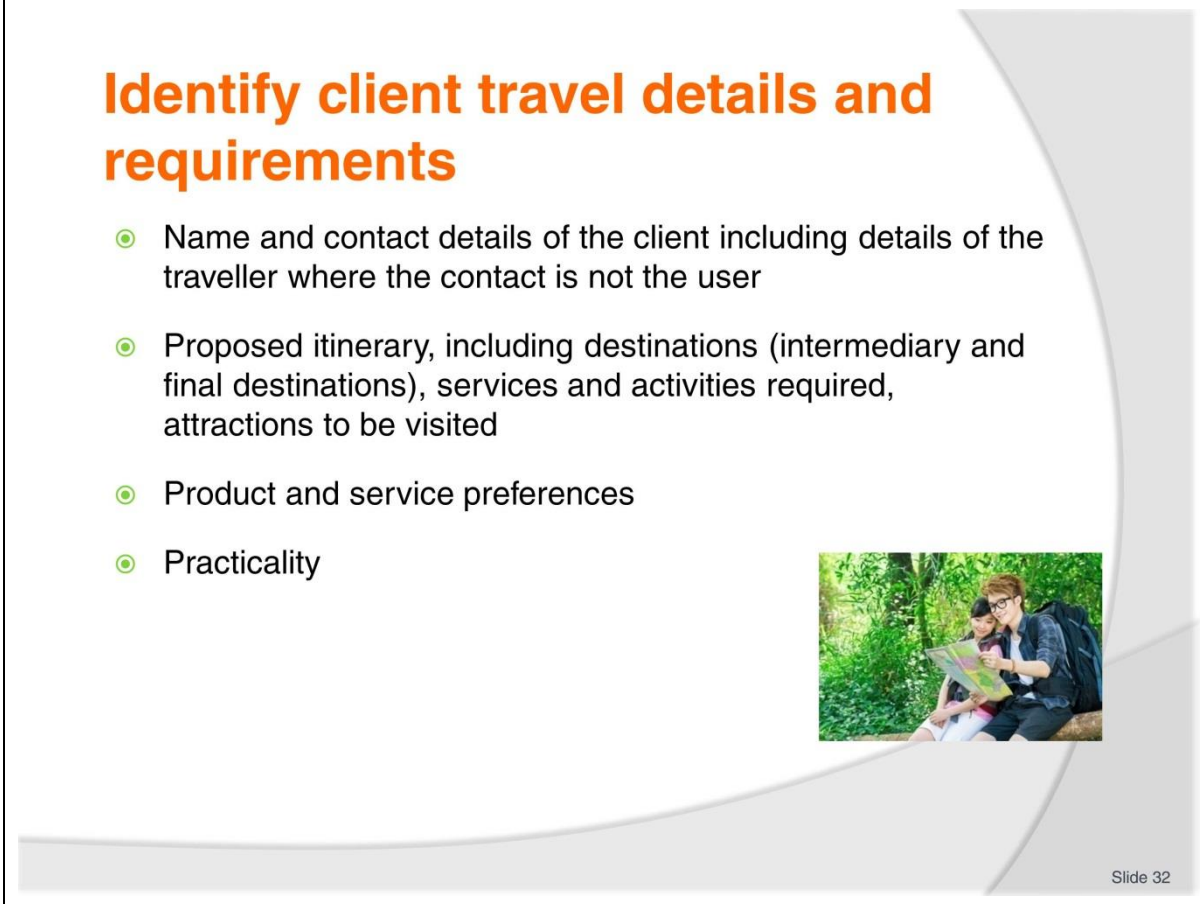
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| 30. | **Class Activity – Identify importance of tourism industry statistics & Activity**<br>• How can you gather information using these methods?<br>• Complete Activity 3. |


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| 31. | **General Discussion**<br>Discuss information to be collected for each of these points.<br>**Role Play**<br>In pairs, one person is the travel agent and the other person the customer seeking a travel quotation.<br>The travel quotation will be based on the thoughts of the customer.<br>The travel agent must gather information and write answers done in an accurate manner. |

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| 32. | **General Discussion**<br>Discuss information to be collected for each of these points.<br>**Role Play**<br>In pairs, one person is the travel agent and the other person the customer seeking a travel quotation.<br>The travel quotation will be based on the thoughts of the customer.<br>The travel agent must gather information and write answers done in an accurate manner. |


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| 33. | **General Discussion**<br>Discuss information to be collected for each of these points.<br>**Role Play**<br>In pairs, one person is the travel agent and the other person the customer seeking a travel quotation.<br>The travel quotation will be based on the thoughts of the customer.<br>The travel agent must gather information and write answers done in an accurate manner. |

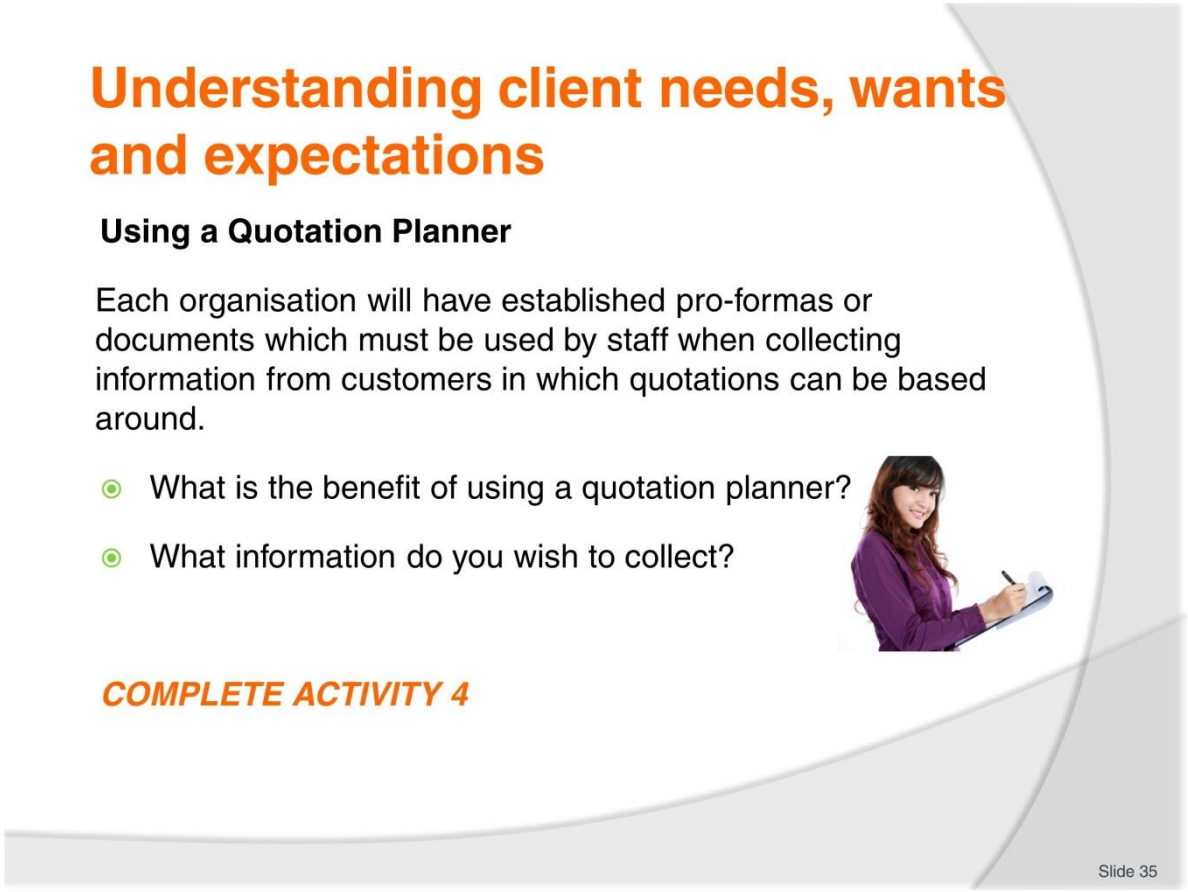
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| 34. | **General Discussion**<br>Discuss information to be collected for each of these points.<br>**Role Play**<br>In pairs, one person is the travel agent and the other person the customer seeking a travel quotation.<br>The travel quotation will be based on the thoughts of the customer.<br>The travel agent must gather information and write answers done in an accurate manner. |


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| 35. | **Class Activity – Demonstration and Activity**<br>• Trainer to show audience copies of a planner<br>• Audience to create their own planners or think of questions they would include in their own planners<br>• Complete Activity 4. |

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| 36. | **Class Activity – Discussion**<br>Ask general questions:<br>• Why is it important?<br>• What needs to be considered? |


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| 37. | **Class Activity – Discussion**<br>Ask general questions:<br>• What are examples of requirements under each point? |

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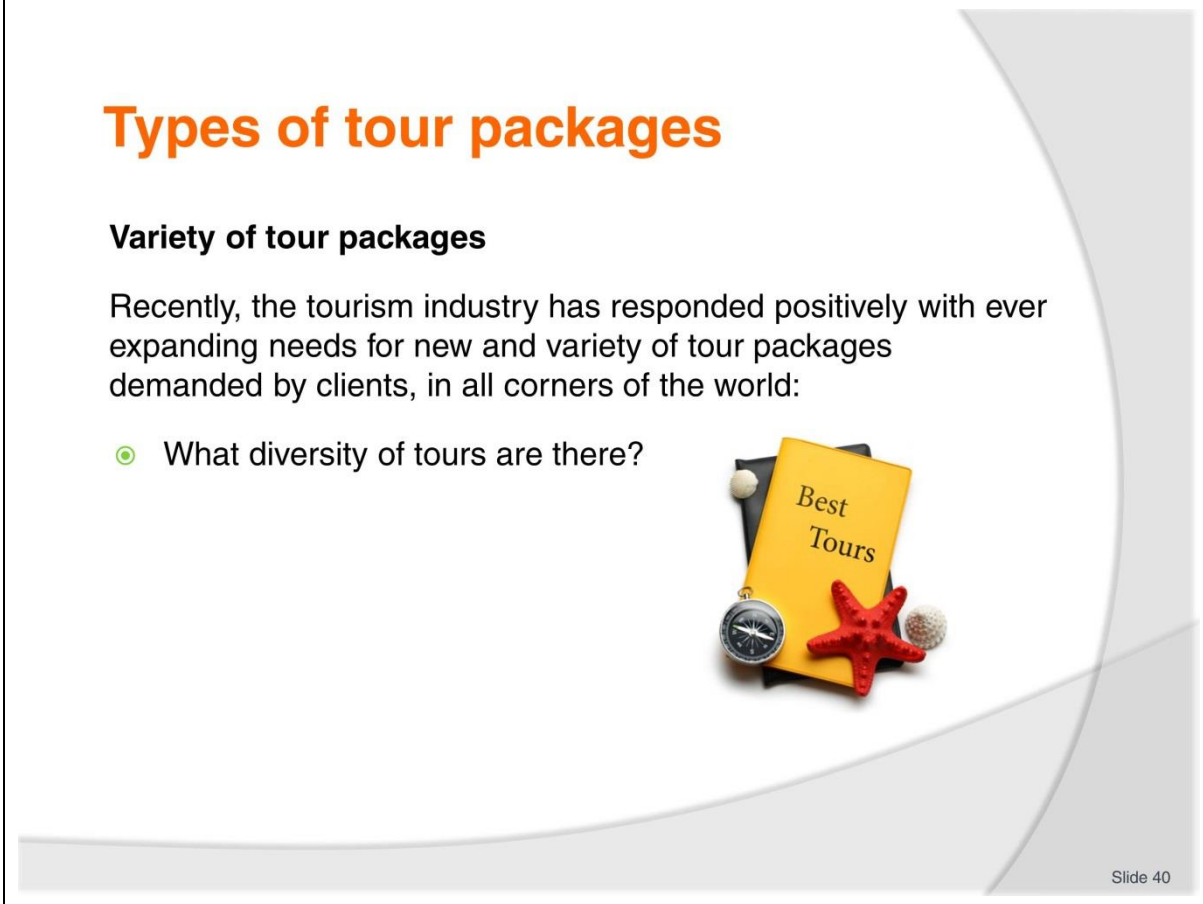



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| 38. | **Class Activity – Discussion**<br>Ask general questions:<br>• What are examples of requirements under each point? |


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| 39. | **Class Activity – Discussion & Activity**<br>Ask general questions:<br>• What are examples of requirements under each point?<br>• Complete Activity 5. |

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| 40. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss the question in the slide. |


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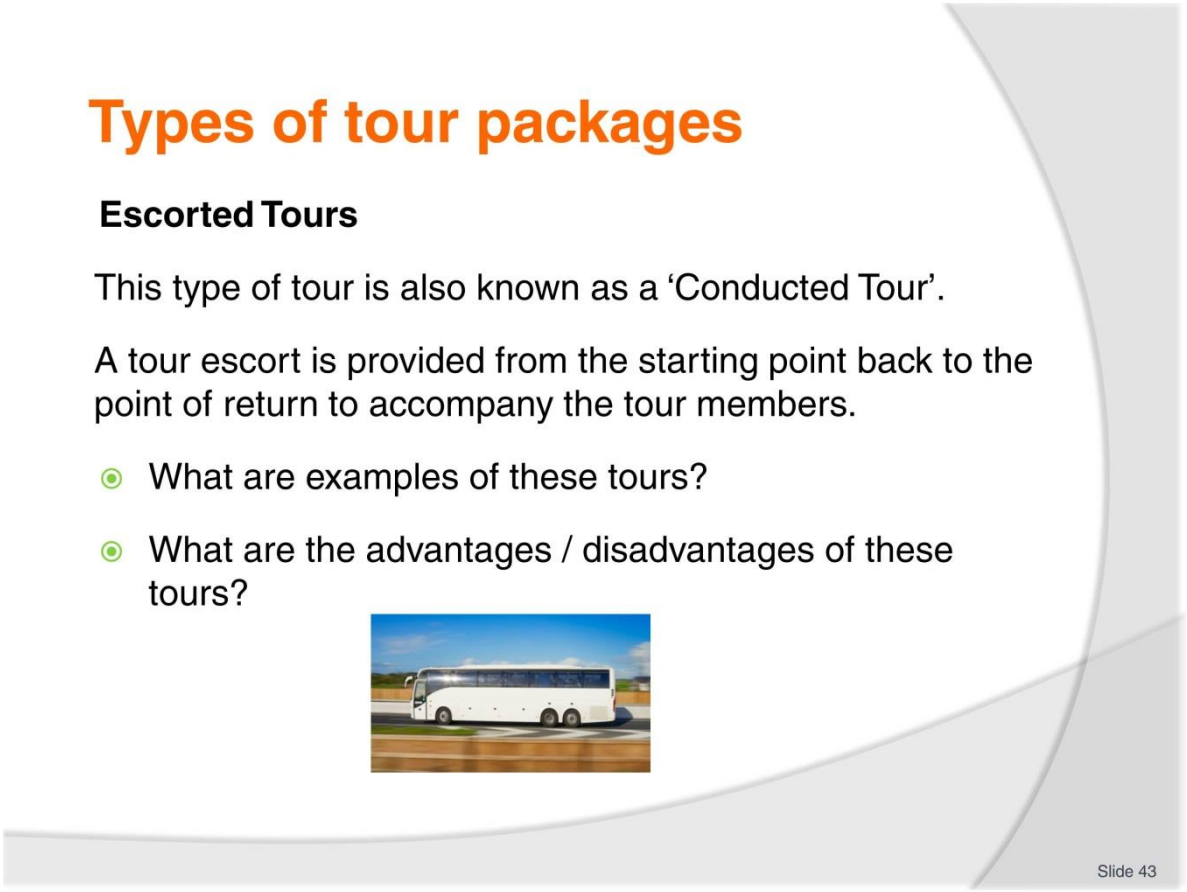
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| 41. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss the question in the slide. |

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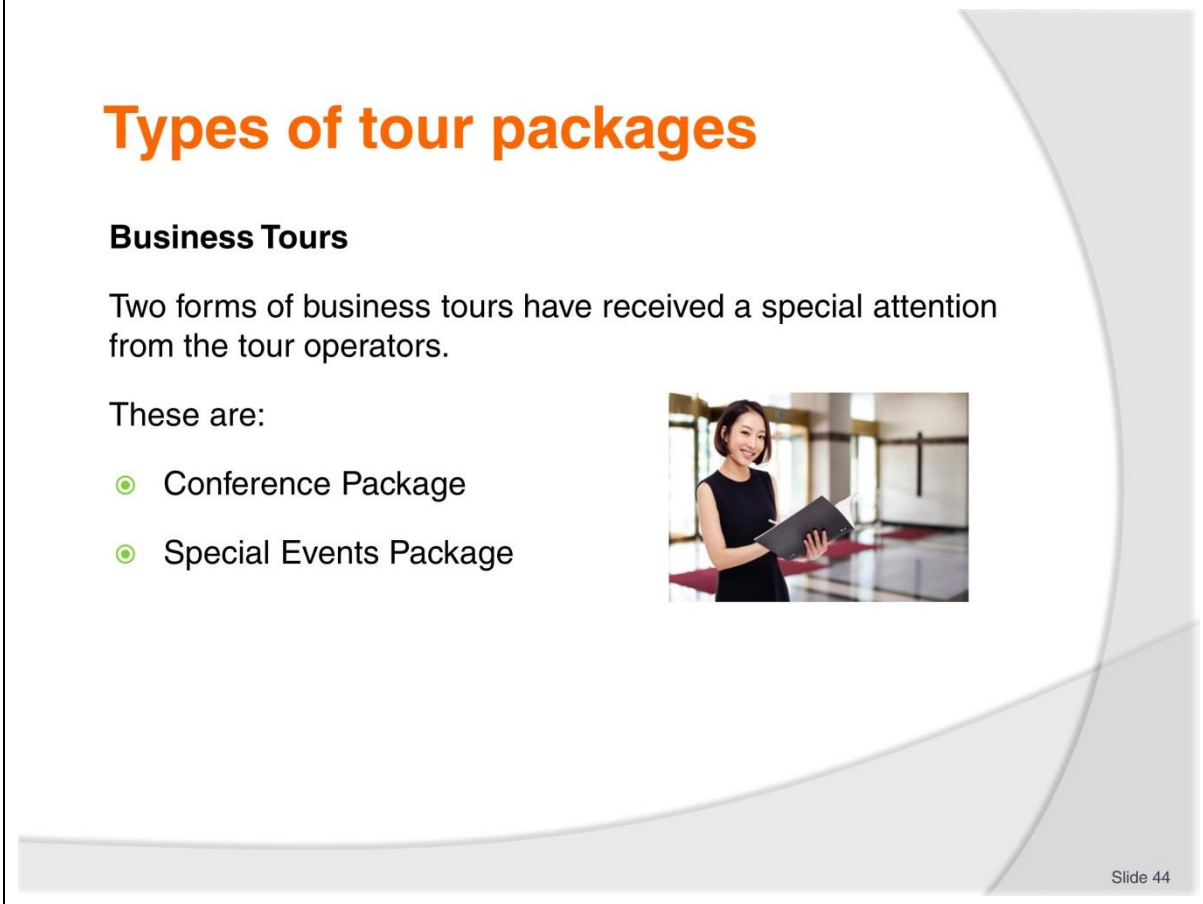
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| 42. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss the question in the slide. |


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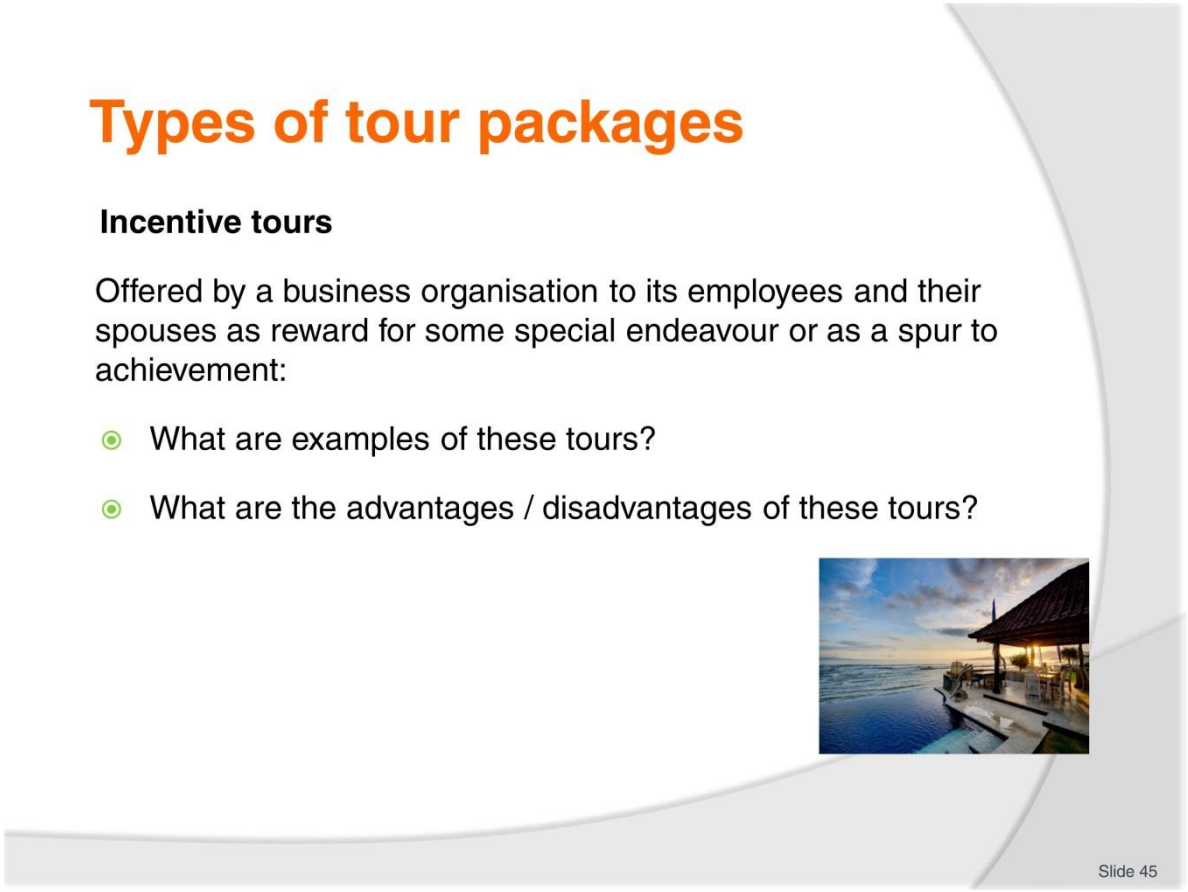



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| 43. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss the question in the slide. |

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| 44. | **Class Activity – Discussion**<br>Ask general questions:<br>• What are examples of these tours?<br>• What are the advantages / disadvantages of these tours? |


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| 45. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss the question in the slide. |

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| 46. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss the question in the slide. |


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| 47. | **Class Activity – Discussion**<br>Ask general questions:<br>• What are examples of inclusions for these tours? |

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| 48. | **Class Activity – Discussion**<br>Ask general questions:<br>• What are examples of inclusions for these tours? |


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| 49. | **Class Activity – Discussion**<br>Ask general questions:<br>• What are examples of inclusions for these tours? |

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| 50. | **Class Activity – Discussion**<br>Ask general questions:<br>• What are examples of inclusions for these tours? |


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| 51. | **Class Activity – Discussion**<br>Ask general questions:<br>• What are examples of inclusions for these tours? |

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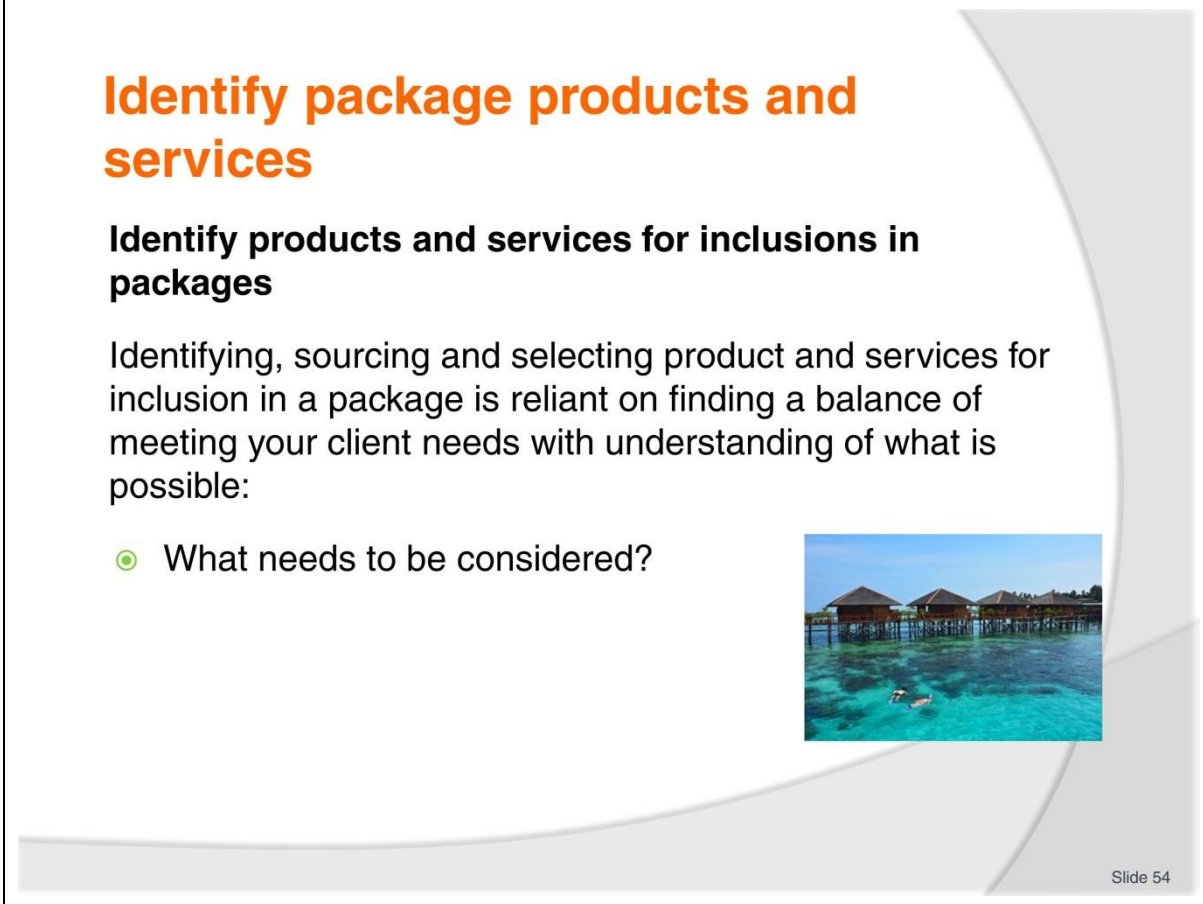
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| 52. | **Class Activity – Discussion**<br>Ask general questions:<br>• What are examples of inclusions for these tours? |


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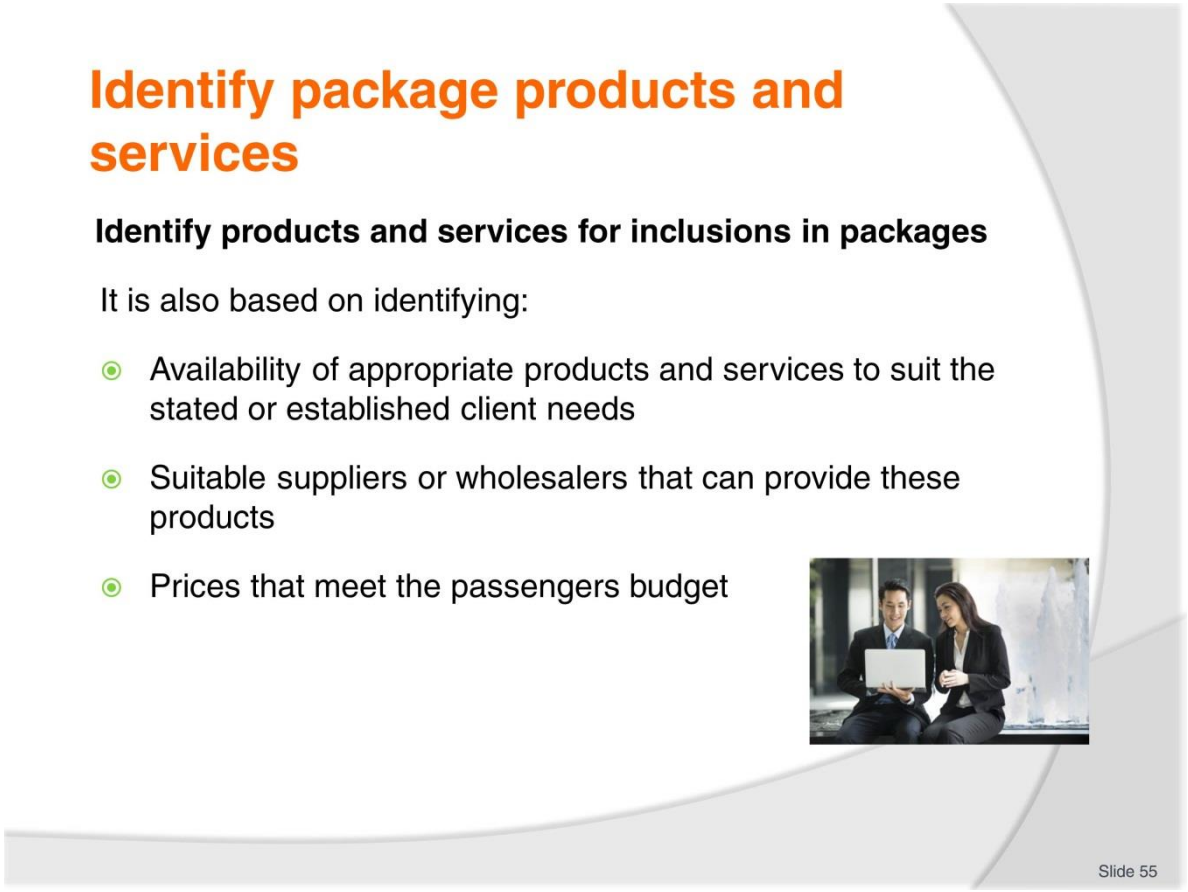



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| 53. | **Class Activity – Discussion & Activity**<br>Ask general questions:<br>• What are popular locations for tours in your country?<br>• Why?<br>• Complete Activity 6. |

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| 54. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss the question in the slide. |


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| 55. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss these considerations. |

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| 56. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss these considerations. |


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| 57. | **Class Activity – Identify products and services**<br>• Audience to prepare a list of possible products and services under each category. |

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| 58. | **Class Activity – Identify products and services**<br>• Audience to prepare a list of possible products and services under each category. |


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| 59. | **Class Activity – Identify products and services & Activity**<br>• Audience to prepare a list of possible products and services under each category<br>• Complete Activity 7. |

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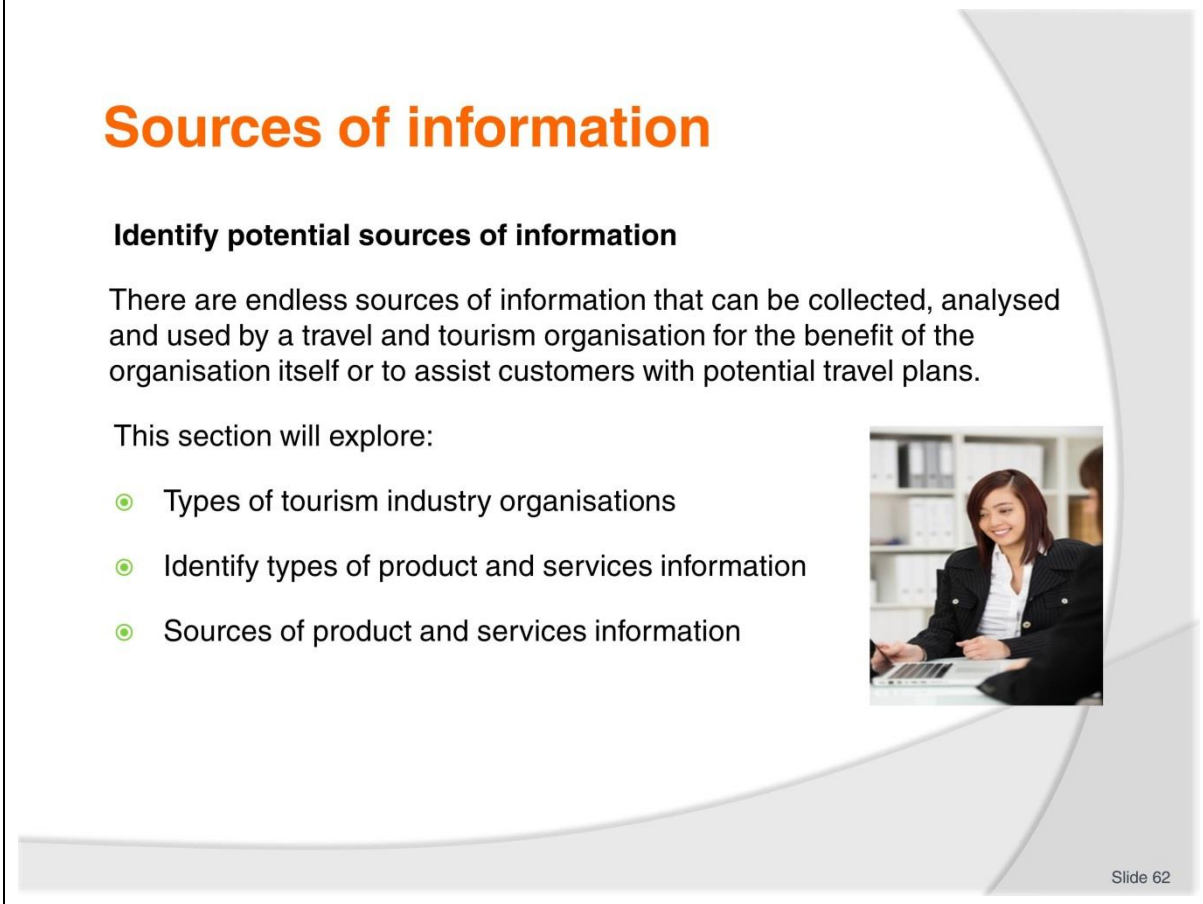
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| 60. | Introduce topic.<br>**Class Activity – General Discussion**<br>Ask general questions:<br>• How can you source products and services for packages? |


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| 61. | Trainer identifies the Performance Criteria for this Element, as listed on the slide. |

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| 62. | **Class Activity – General Discussion**<br>• What are examples for each of these points. |


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| 63. | **Class Activity – General Discussion**<br>• Discuss question in the slide. |

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| 64. | **Class Activity – Identify businesses for each type of business**<br>• Identify actual companies for each type of tourism business. |


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| 65. | **Class Activity – Identify businesses for each type of business**<br>• Identify actual companies for each type of tourism business. |

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| 66. | **Class Activity – Identify businesses for each type of business**<br>• Identify actual companies for each type of tourism business. |


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| 67. | **Class Activity – Identify businesses for each type of business**<br>• Identify actual companies for each type of tourism business. |

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| 68. | **Class Activity – Identify businesses for each type of business**<br>• Identify actual companies for each type of tourism business. |


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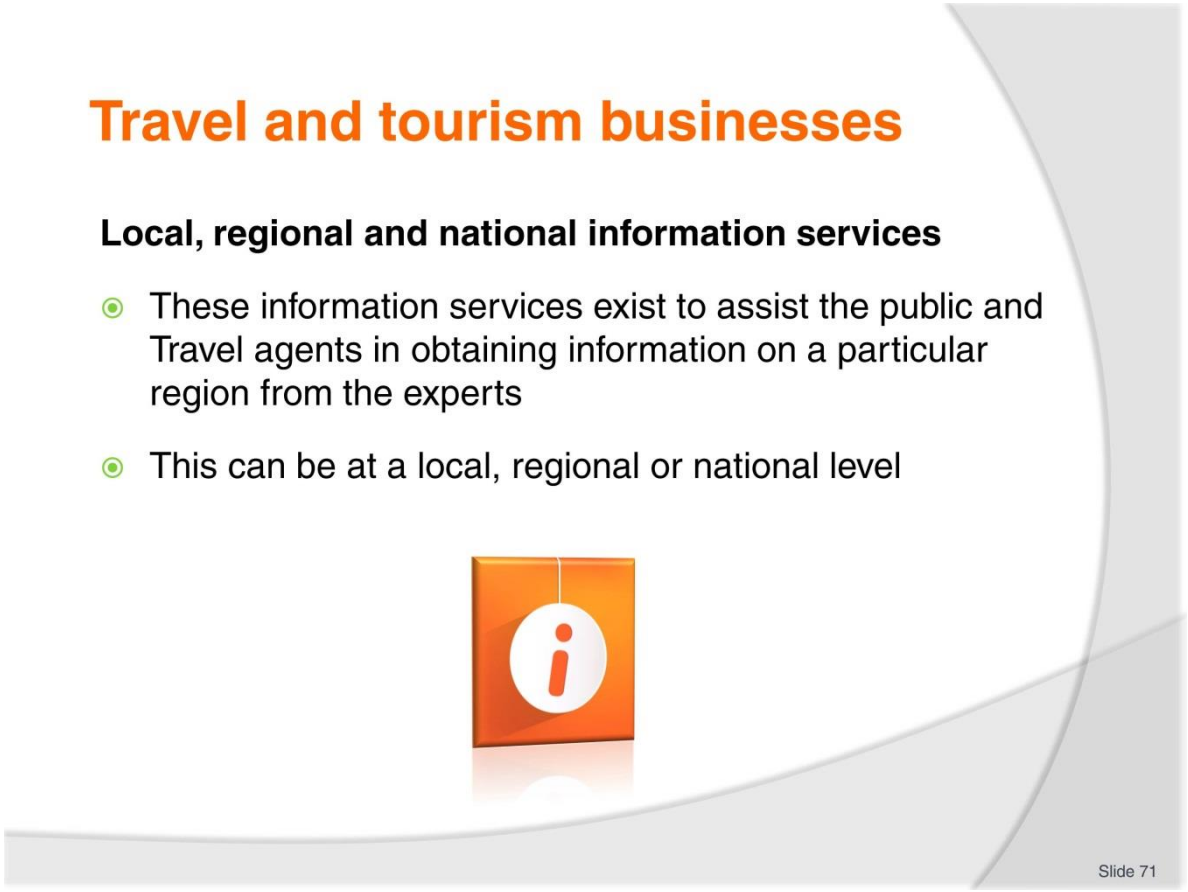
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| 69. | **Class Activity – Identify businesses for each type of business**<br>• Identify actual companies for each type of tourism business. |

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| 70. | **Class Activity – Identify businesses for each type of business**<br>• Identify actual companies for each type of tourism business |


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| 71. | **Class Activity – Identify businesses for each type of business**<br>• Identify actual companies for each type of tourism business. |

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| 72. | **Class Activity – Identify businesses for each type of business**<br>• Identify actual companies for each type of tourism business. |


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| 73. | **Class Activity – Identify businesses for each type of business**<br>• Identify actual companies for each type of tourism business. |

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| 74. | **Class Activity – Identify businesses for each type of business**<br>• Identify actual companies for each type of tourism business. |


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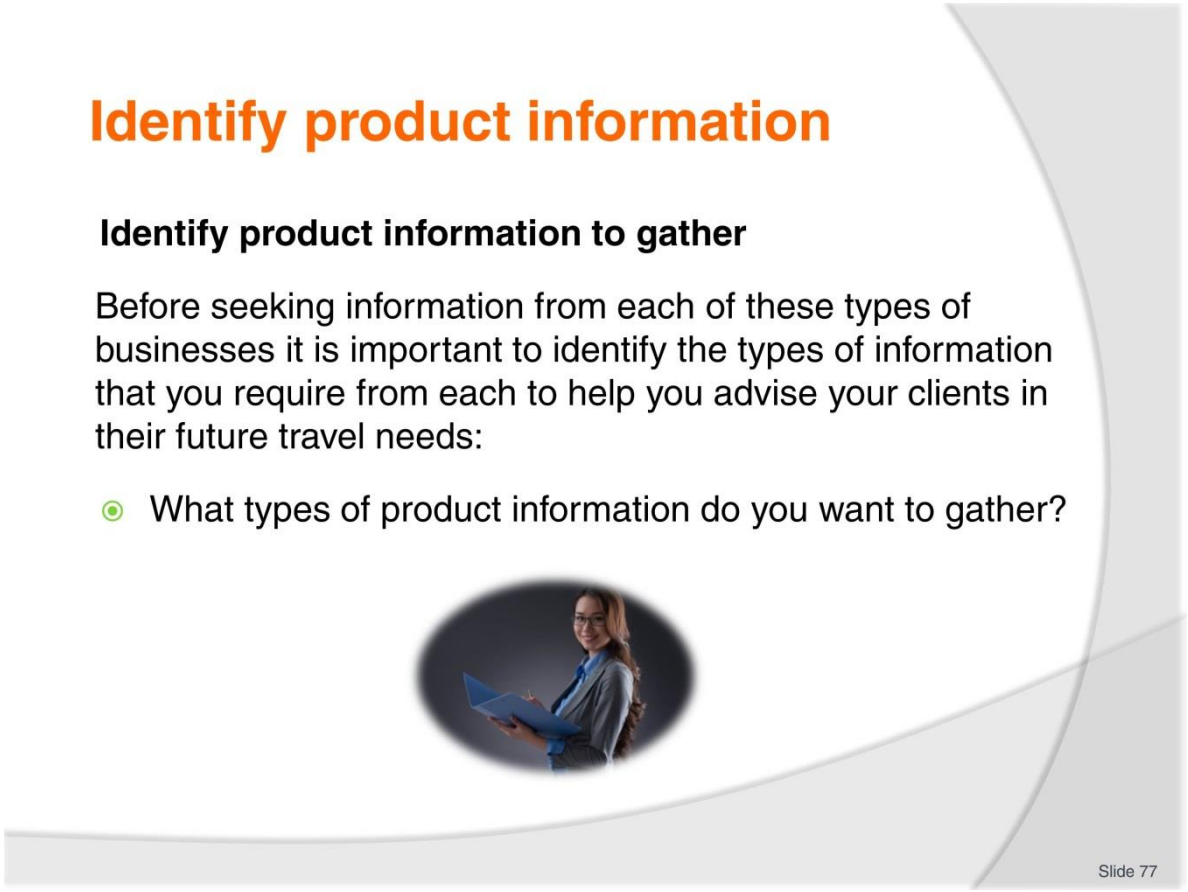
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| 75. | **Class Activity – Identify businesses for each type of business**<br>• Identify actual companies for each type of tourism business. |

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| 76. | **Class Activity – Identify businesses for each type of business & Activity**<br>• Identify actual companies for each type of tourism business<br>• Complete Activity 8. |


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| 77. | **Class Activity – Question**<br>• Discuss the question in the slide. |

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| 78. | **Class Activity – Question**<br>• Discuss the types of information to be collected under each point?<br>• How can you collect this information?<br>• What format would you like it in? |


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| 79. | **Class Activity – Question**<br>• Discuss the types of information to be collected under each point?<br>• How can you collect this information?<br>• What format would you like it in? |

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| 80. | **Class Activity – Question**<br>• Discuss the types of information to be collected under each point?<br>• How can you collect this information?<br>• What format would you like it in? |


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| 81. | **Class Activity – Question**<br>• Discuss the questions in the slide. |

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| 82. | **Class Activity – Question**<br>• Discuss the types of information to be collected under each point?<br>• How can you collect this information?<br>• What format would you like it in? |


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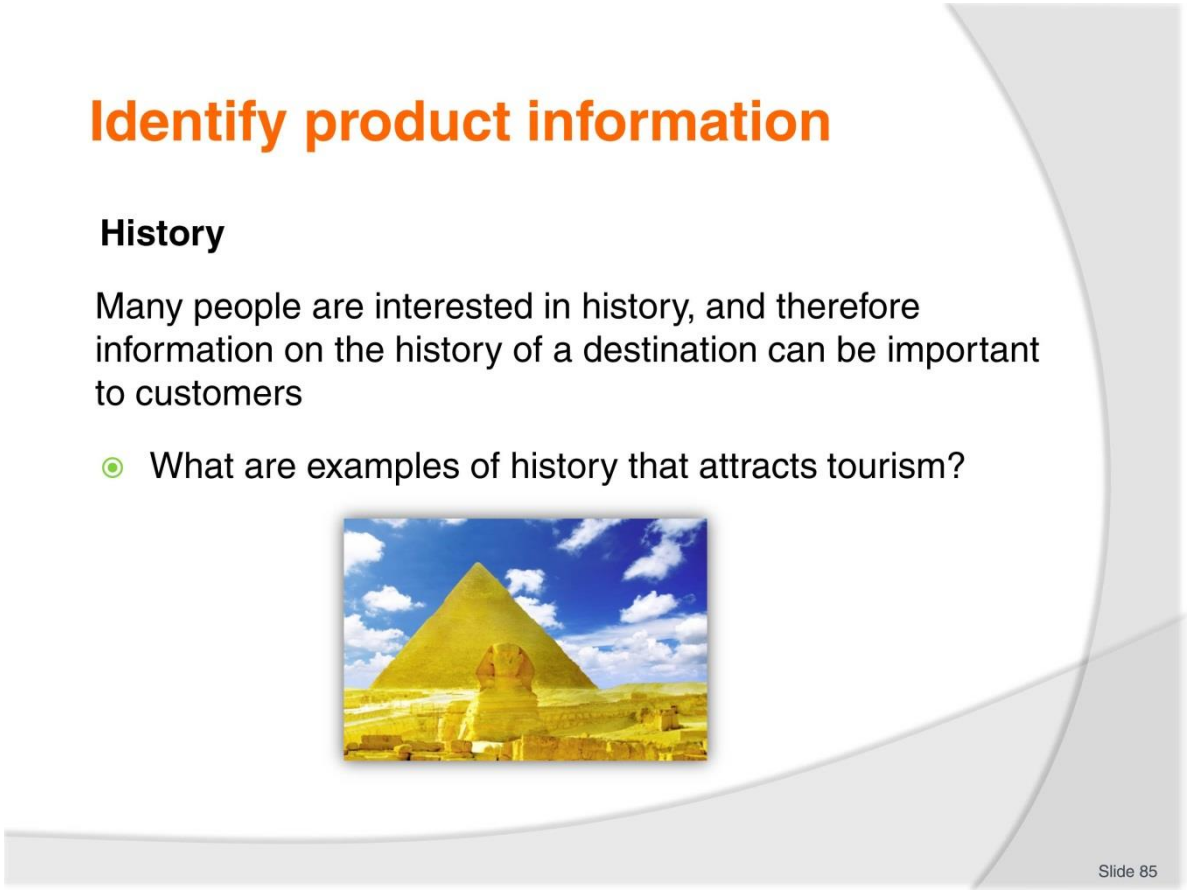
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| 83. | **Class Activity – Question**<br>• Discuss the types of information to be collected under each point?<br>• How can you collect this information?<br>• What format would you like it in? |

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| 84. | **Class Activity – Question**<br>• Discuss the questions in the slide. |


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| 85. | **Class Activity – Question**<br>• Discuss the questions in the slide. |

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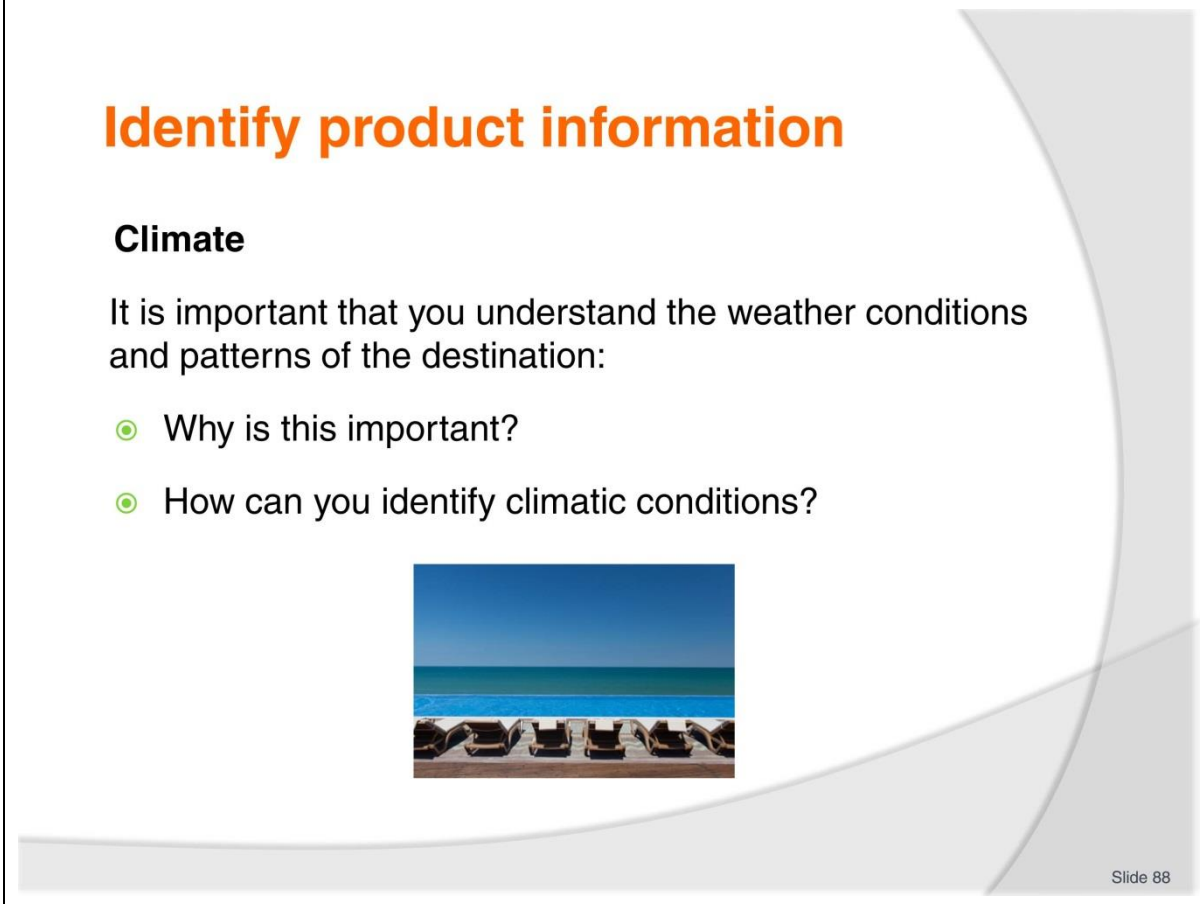



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| 86. | **Class Activity – Question**<br>• Discuss the types of information to be collected under each point?<br>• How can you collect this information?<br>• What format would you like it in? |


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| 87. | **Class Activity – Question**<br>• Discuss the questions in the slide. |

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| 88. | **Class Activity – Question**<br>• Discuss the questions in the slide. |

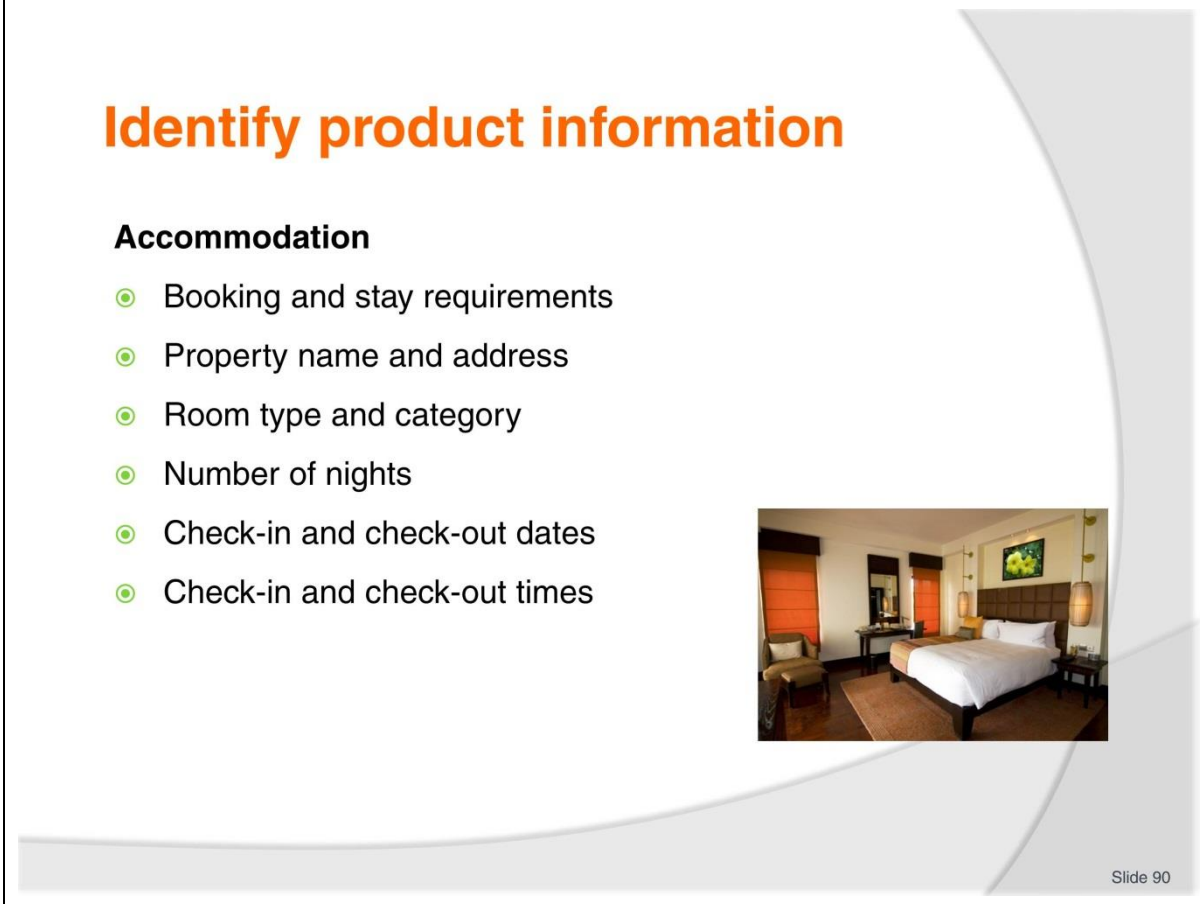

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| 89. | **Class Activity – Question**<br>• Discuss the types of information to be collected under each point?<br>• How can you collect this information?<br>• What format would you like it in? |

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| 90. | **Class Activity – Question**<br>• Discuss the types of information to be collected under each point?<br>• How can you collect this information?<br>• What format would you like it in? |


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| 91. | **Class Activity – Question**<br>• Discuss the types of information to be collected under each point?<br>• How can you collect this information?<br>• What format would you like it in? |

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| 92. | **Class Activity – Question**<br>• Discuss the types of information to be collected under each point?<br>• How can you collect this information?<br>• What format would you like it in? |


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| 93. | **Class Activity – Question**<br>• Discuss the types of information to be collected under each point?<br>• How can you collect this information?<br>• What format would you like it in? |

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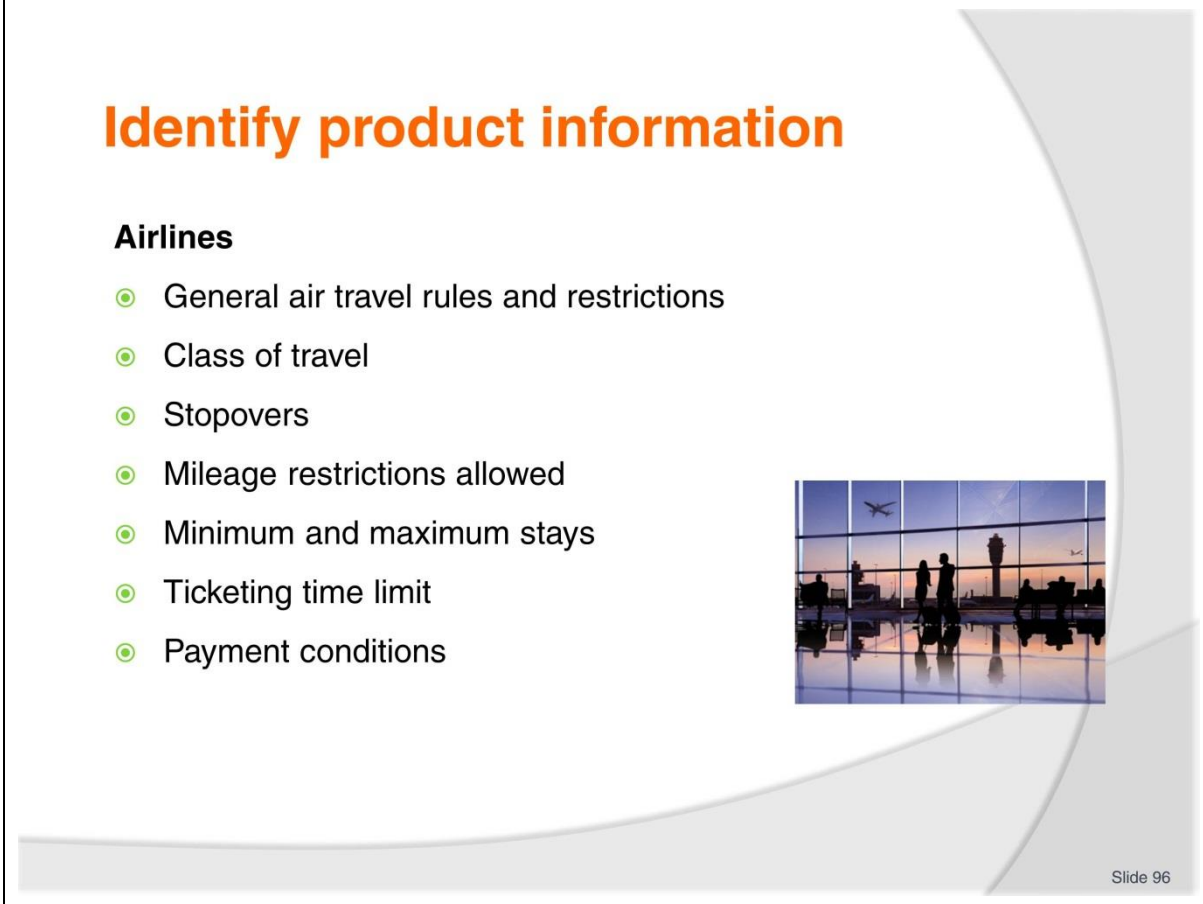



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| 94. | **Class Activity – Question**<br>• Discuss the types of information to be collected under each point?<br>• How can you collect this information?<br>• What format would you like it in? |


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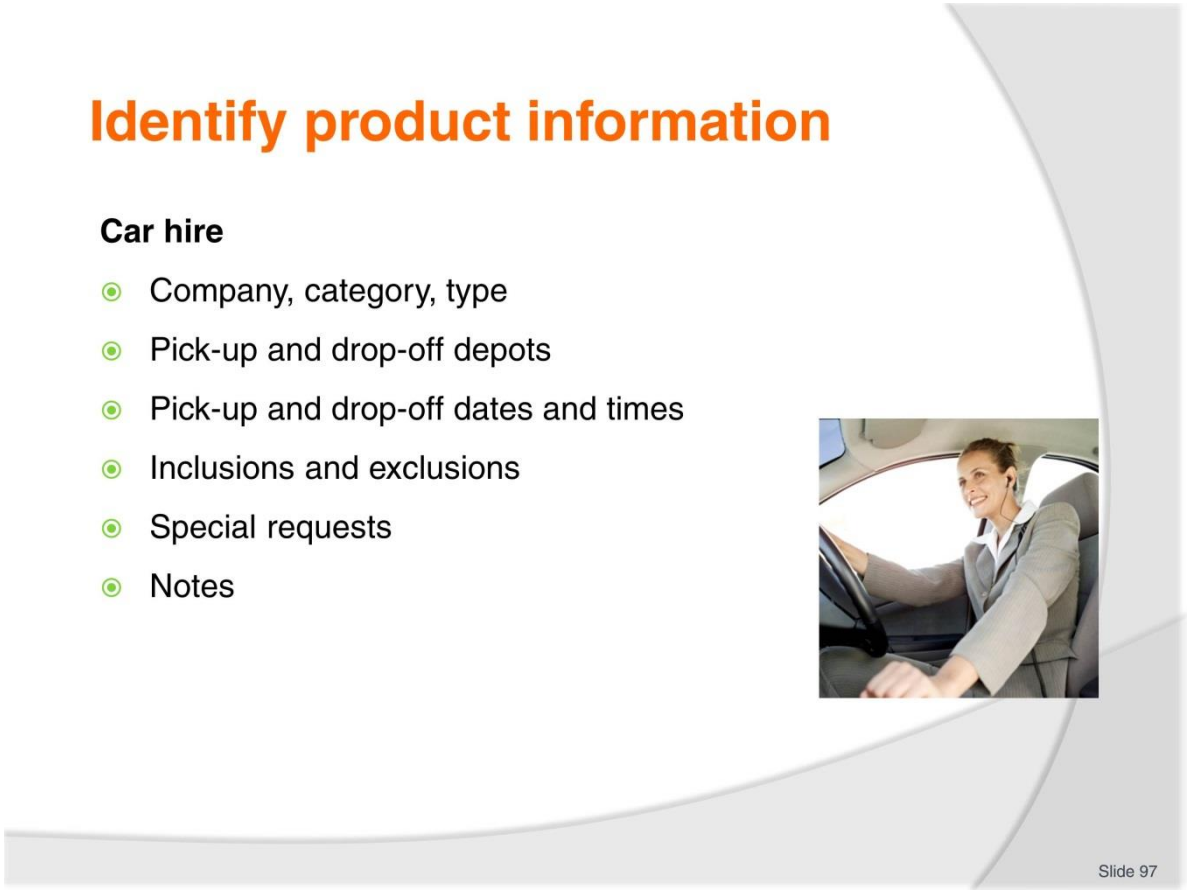
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| 95. | **Class Activity – Question**<br>• Discuss the types of information to be collected under each point?<br>• How can you collect this information?<br>• What format would you like it in? |

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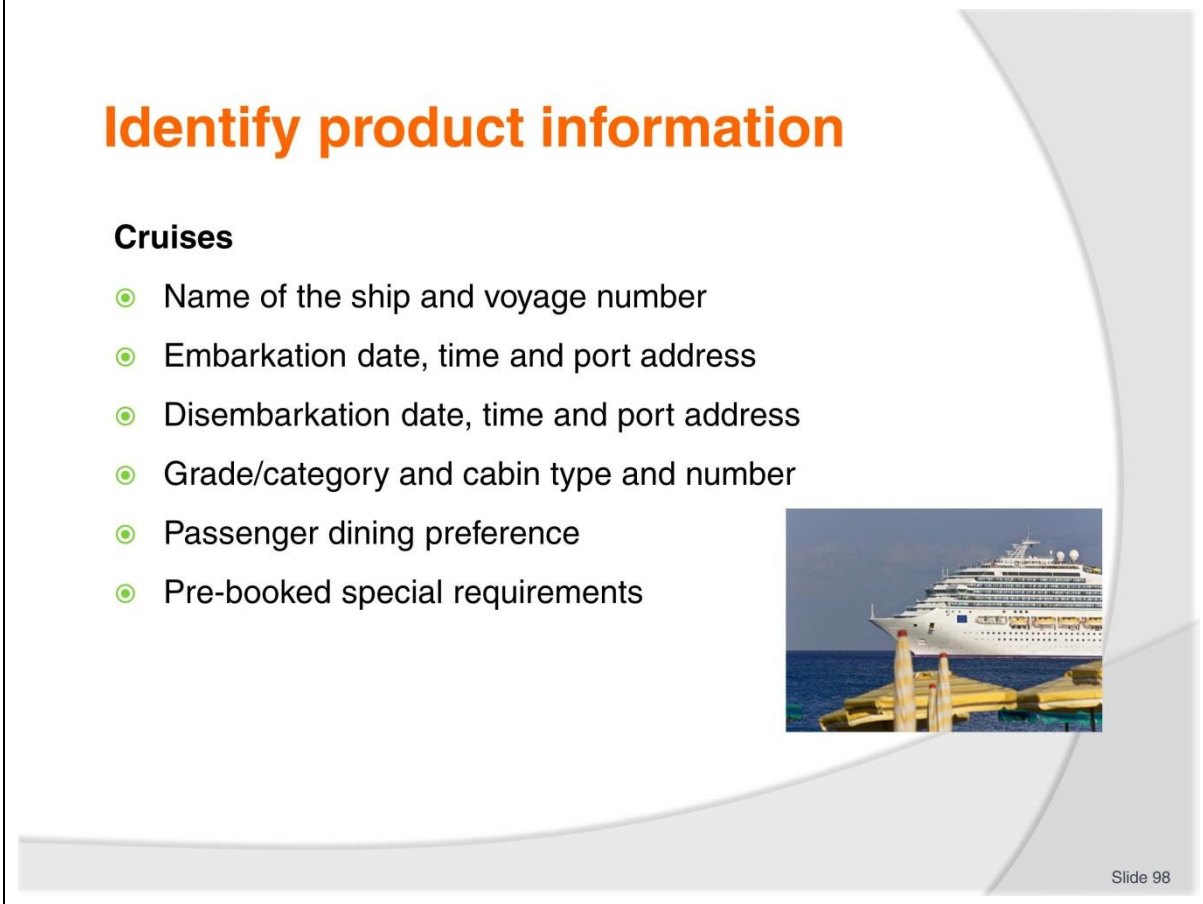


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| 96. | **Class Activity – Question**<br>• Discuss the types of information to be collected under each point?<br>• How can you collect this information?<br>• What format would you like it in? |


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| 97. | **Class Activity – Question**<br>• Discuss the types of information to be collected under each point?<br>• How can you collect this information?<br>• What format would you like it in? |

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| 98. | **Class Activity – Question**<br>• Discuss the types of information to be collected under each point?<br>• How can you collect this information?<br>• What format would you like it in? |


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| 99. | **Class Activity – Question**<br>• Discuss the types of information to be collected under each point?<br>• How can you collect this information?<br>• What format would you like it in? |

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| 100. | **Class Activity – Question**<br>• Discuss the types of information to be collected under each point?<br>• How can you collect this information?<br>• What format would you like it in? |


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| 101. | **Class Activity – Identify sources of information**<br>• Trainer to show sources of information<br>• What information can be gathered from each source? |

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| 102. | **Class Activity – Identify sources of information**<br>• Trainer to show sources of information<br>• What information can be gathered from each source? |

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| 103. | **Class Activity – Identify sources of information**<br>• Trainer to show sources of information<br>• What information can be gathered from each source? |

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| 104. | **Class Activity – Identify sources of information**<br>• Trainer to show sources of information<br>• What information can be gathered from each source? |


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| 105. | **Class Activity – Identify sources of information**<br>• Trainer to show sources of information<br>• What information can be gathered from each source? |

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| 106. | **Class Activity – Discuss**<br>• Describe the process that you have used in the past when conducting research. |


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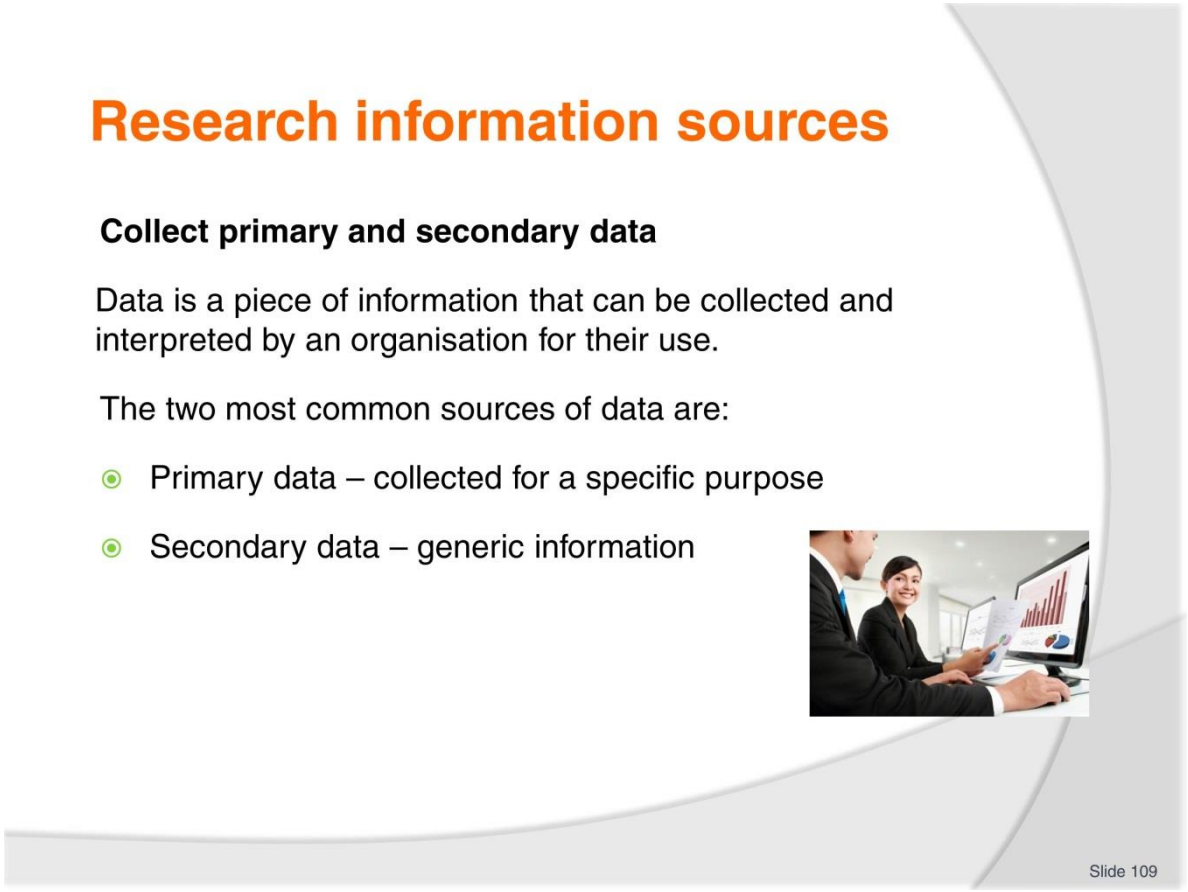
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| 107. | **Class Activity – Discuss**<br>• What are the activities and benefits for each of these steps? |

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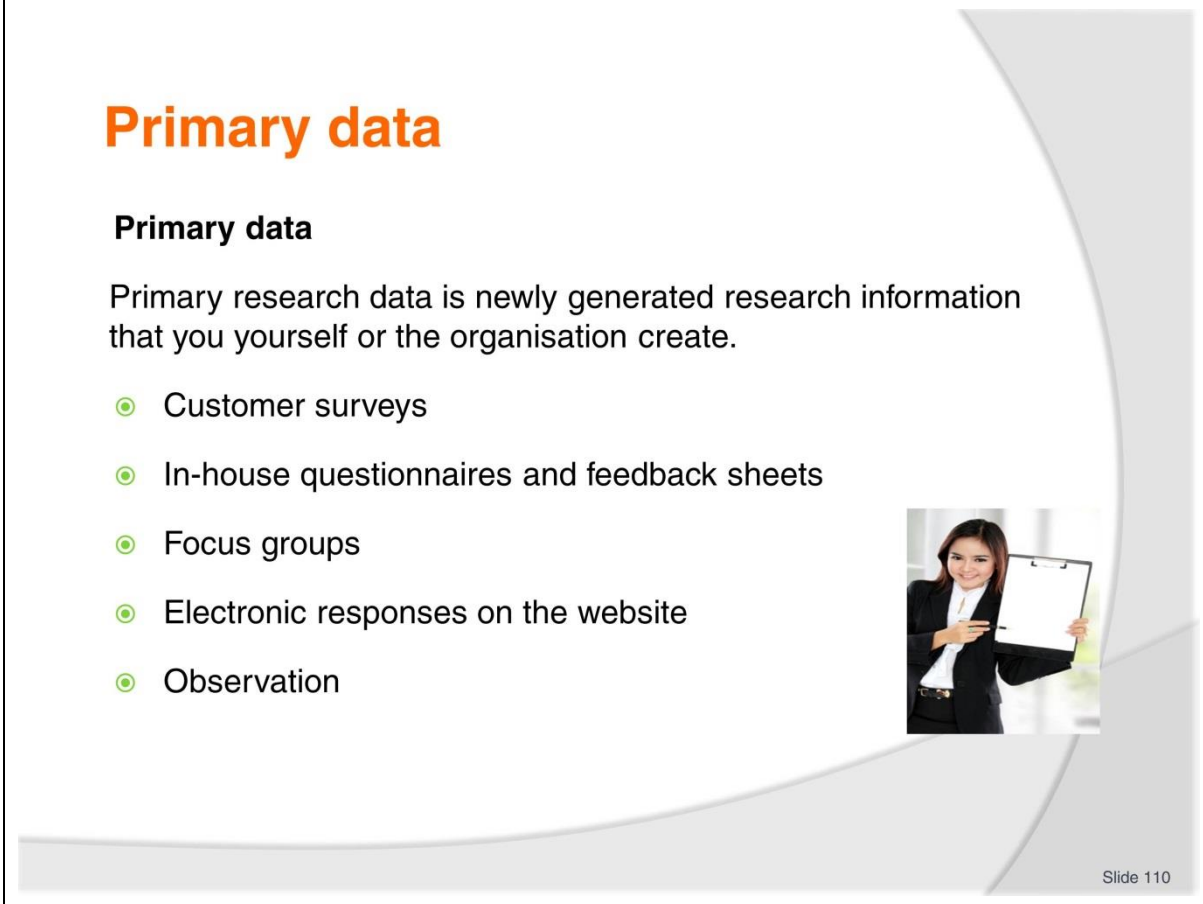


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| 108. | **Class Activity – Discuss**<br>For a case study of your choice, identify:<br>• Research topics. |


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| 109. | **Class Activity – Discuss**<br>• What are examples of each? |

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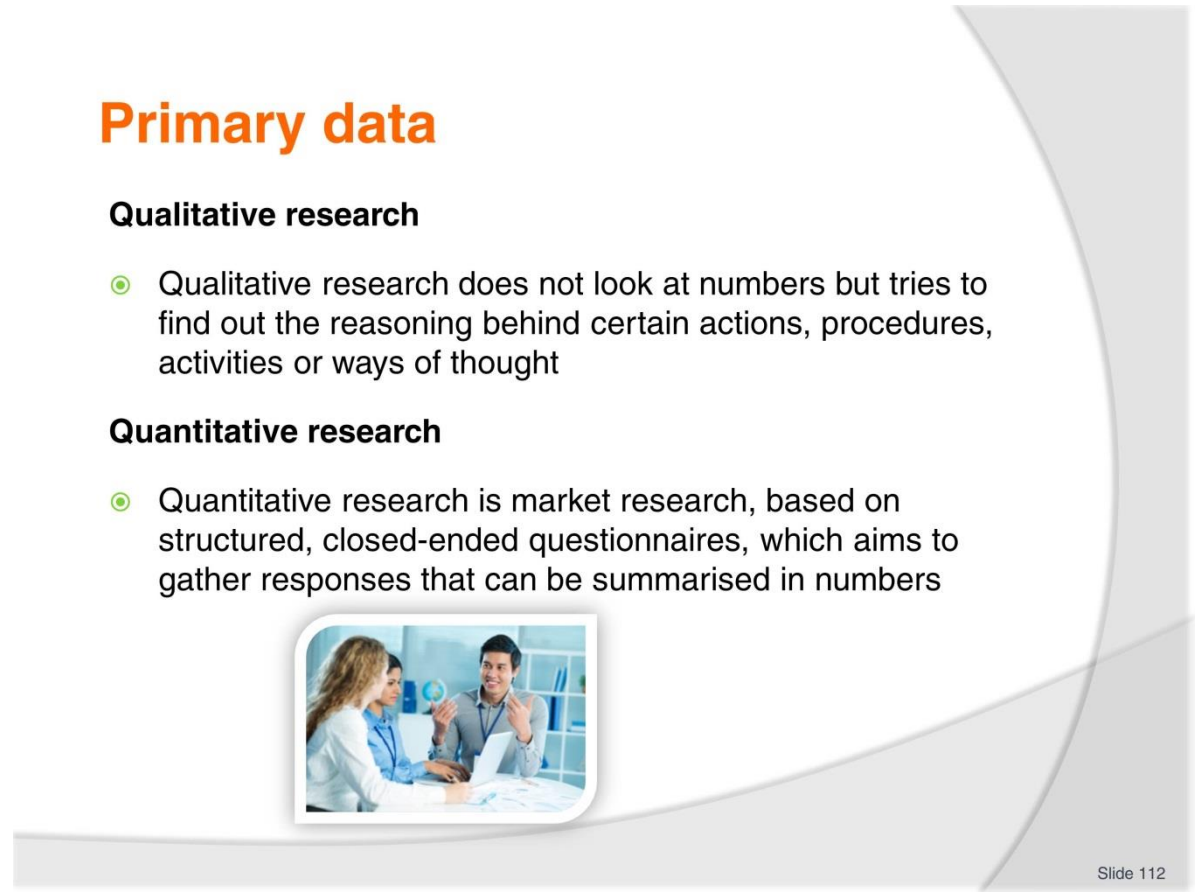


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| 110. | **Class Activity – Discuss**<br>• What are other examples of primary data? |


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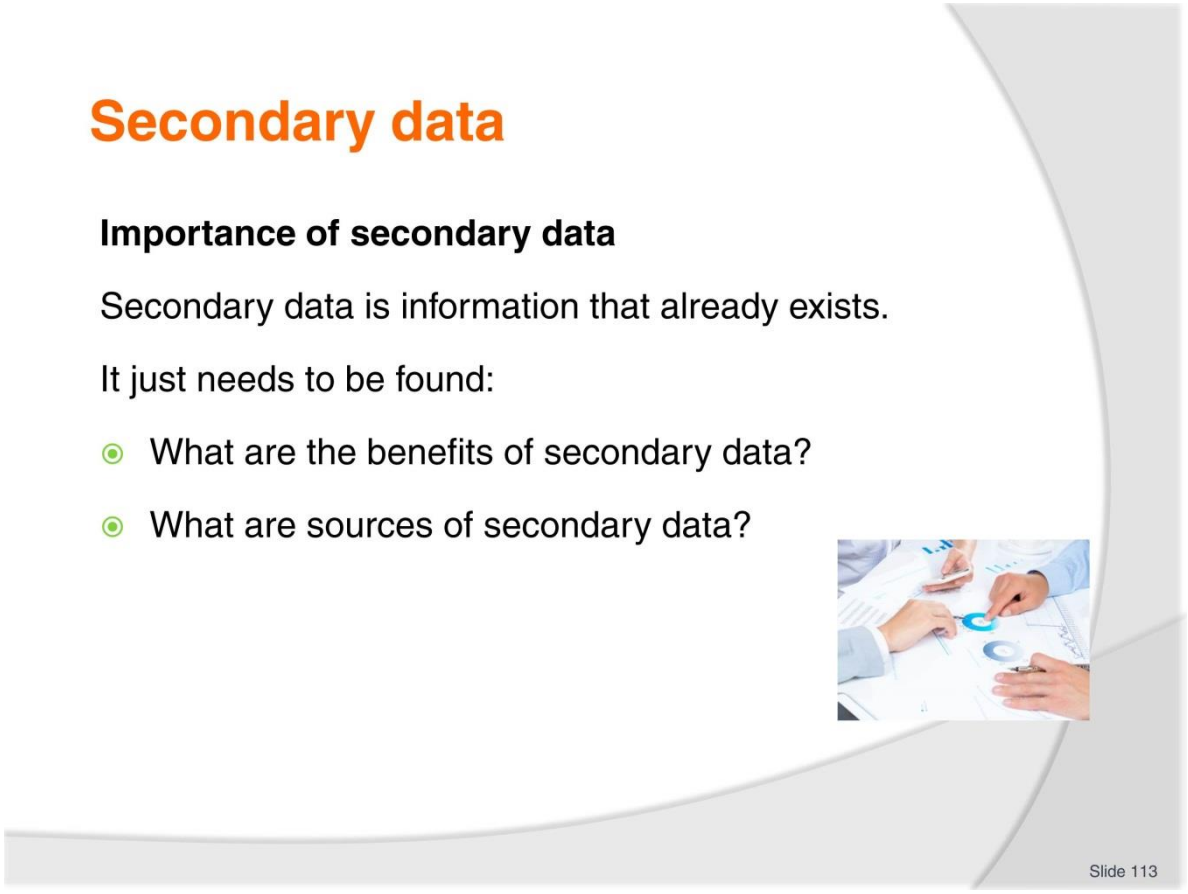
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| 111. | **Class Activity – Discuss**<br>• What is the difference between these two types of research? |

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| 112. | **Class Activity – Discuss**<br>• What are examples of each? |


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| 113. | **Class Activity – Discuss**<br>• Discuss questions in the slide. |

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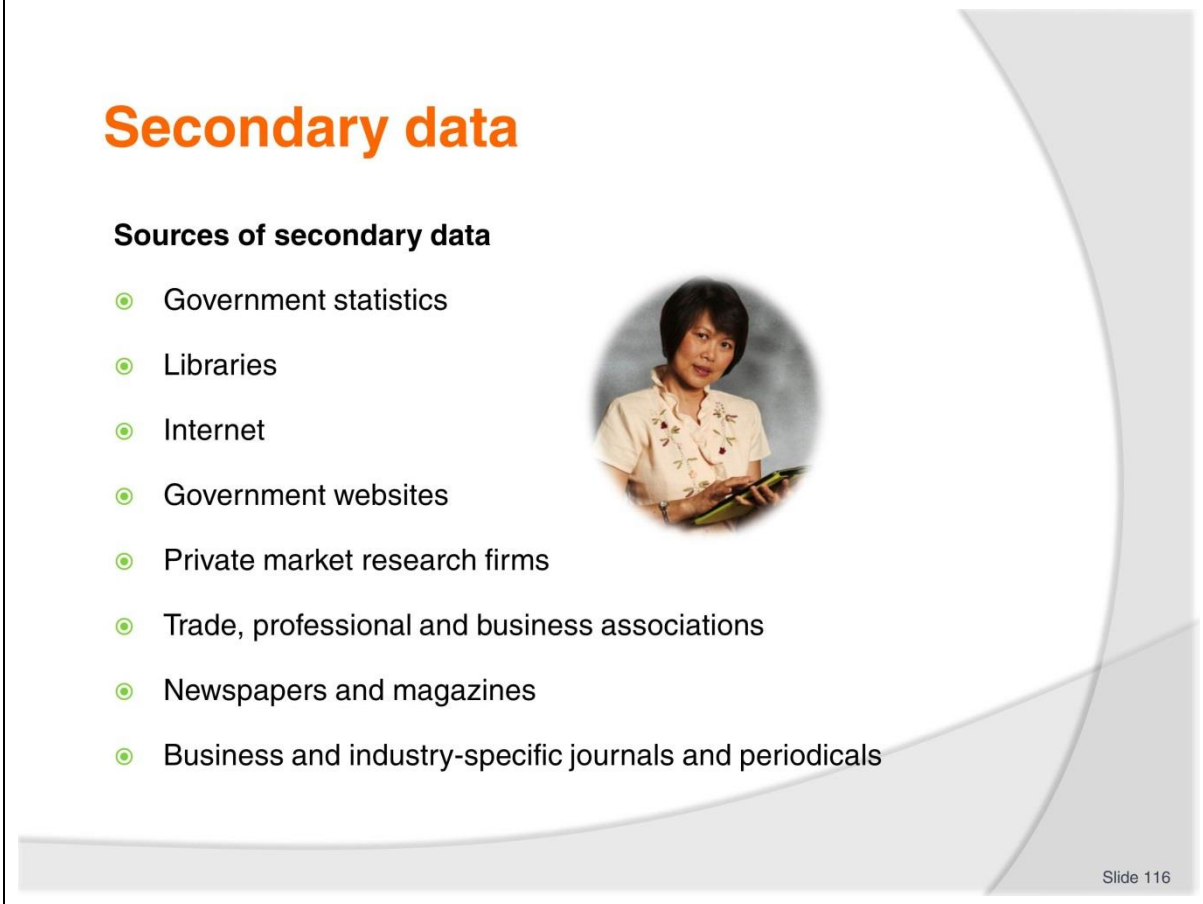
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| 114. | **Class Activity – Discuss**<br>• What are the benefits of collecting these pieces of data?<br>• What other types of secondary data would you collect? |


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| 115. | **Class Activity – Discuss**<br>• What are the benefits of collecting these pieces of data?<br>• What other types of secondary data would you collect? |

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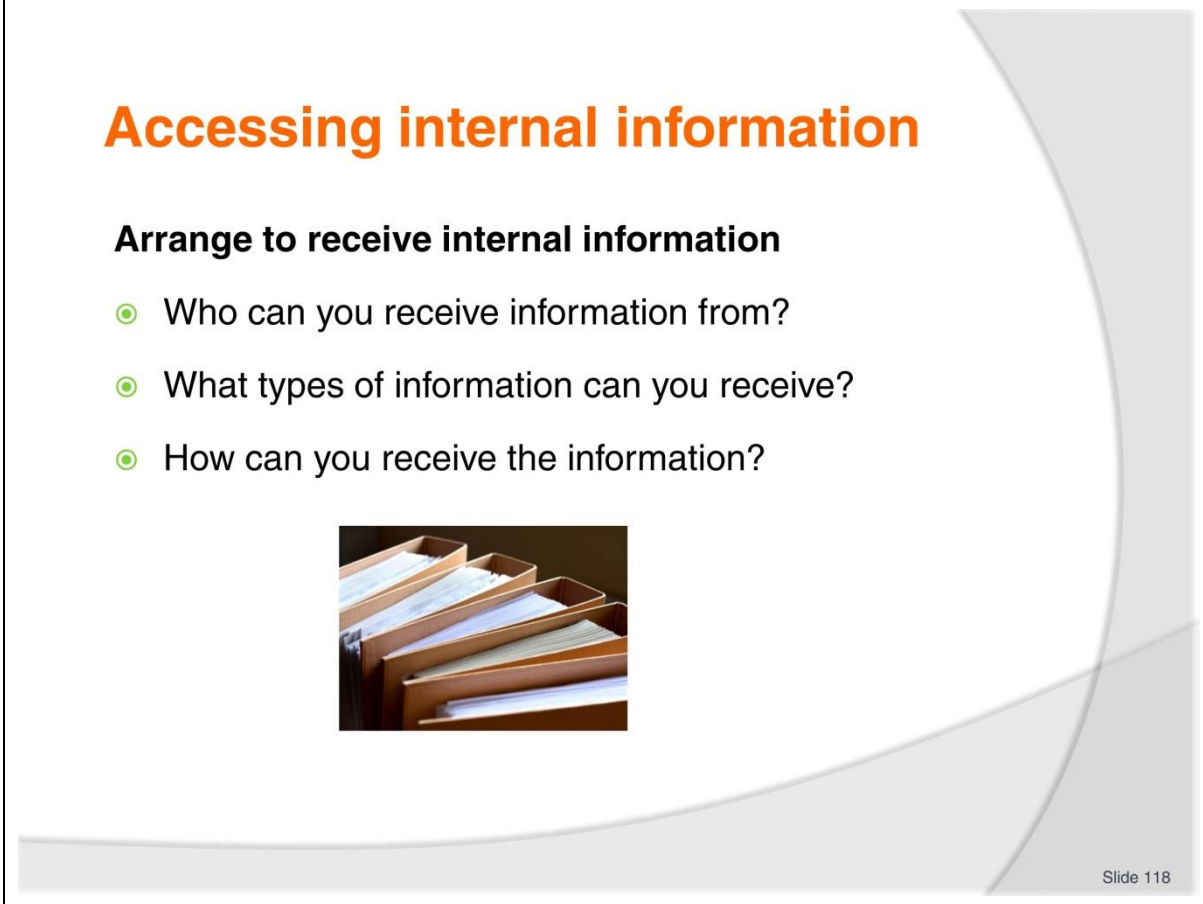



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| 116. | **Class Activity – Discuss**<br>• What information is found from these sources?<br>• What types of secondary data would you seek? |


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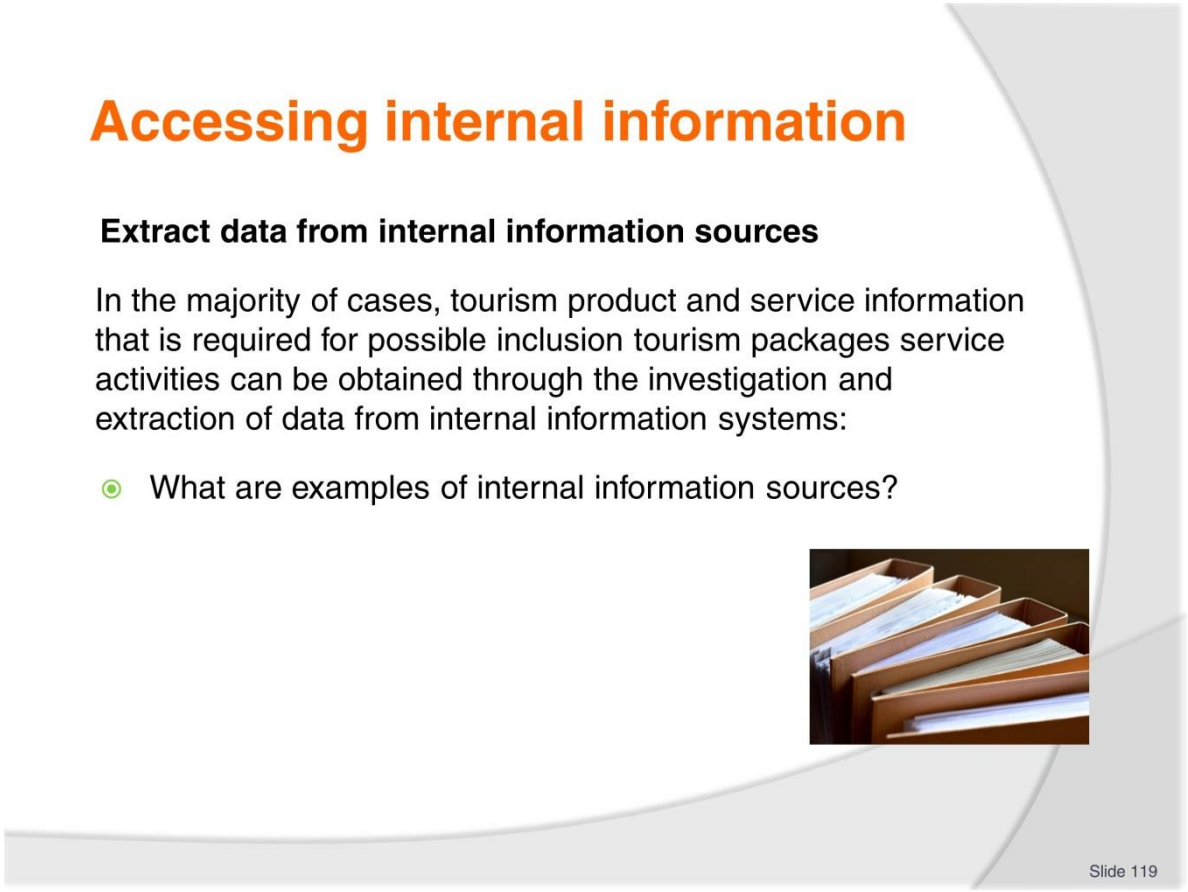
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| 117. | **Class Activity – Discuss**<br>• Why is this source of information often the most effective? |

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| 118. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss the questions in the slide. |

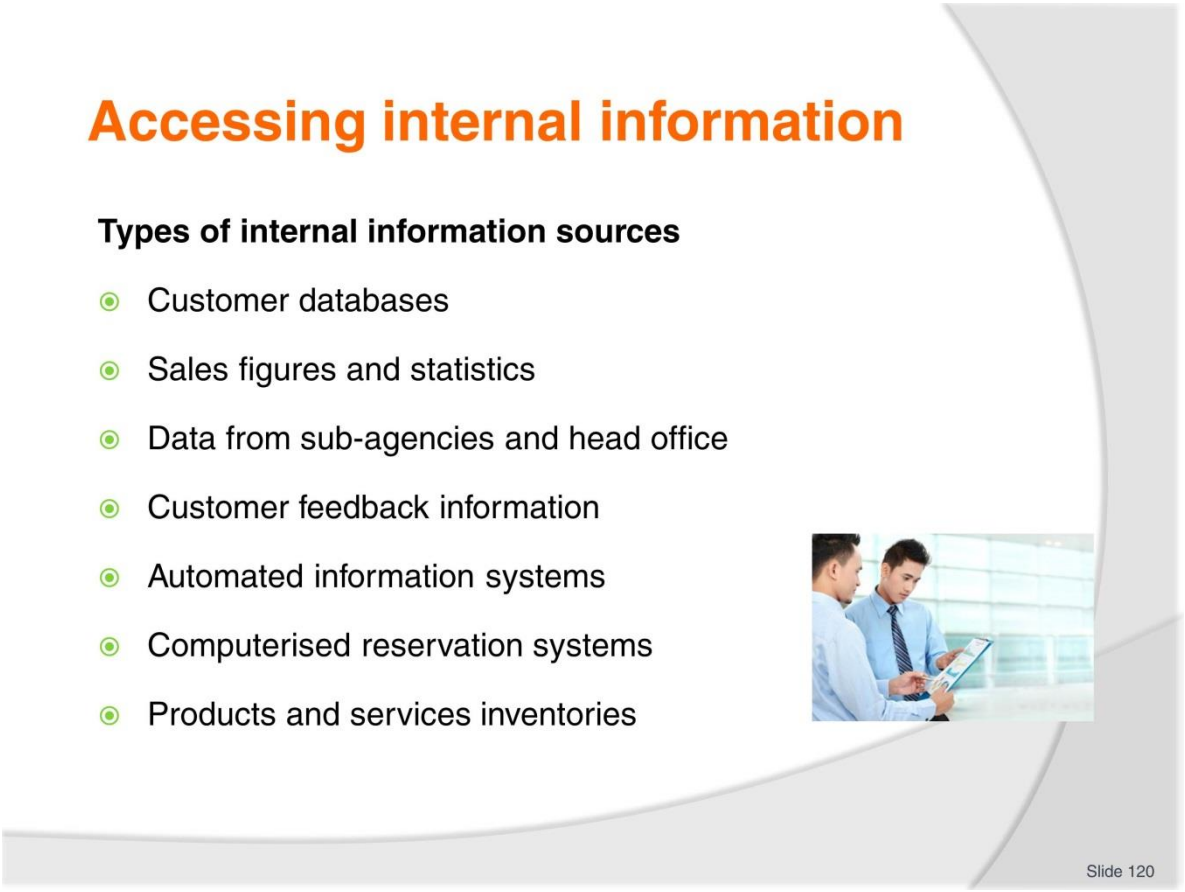

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| 119. | **Class Activity – Discuss**<br>• Discuss question in the slide. |

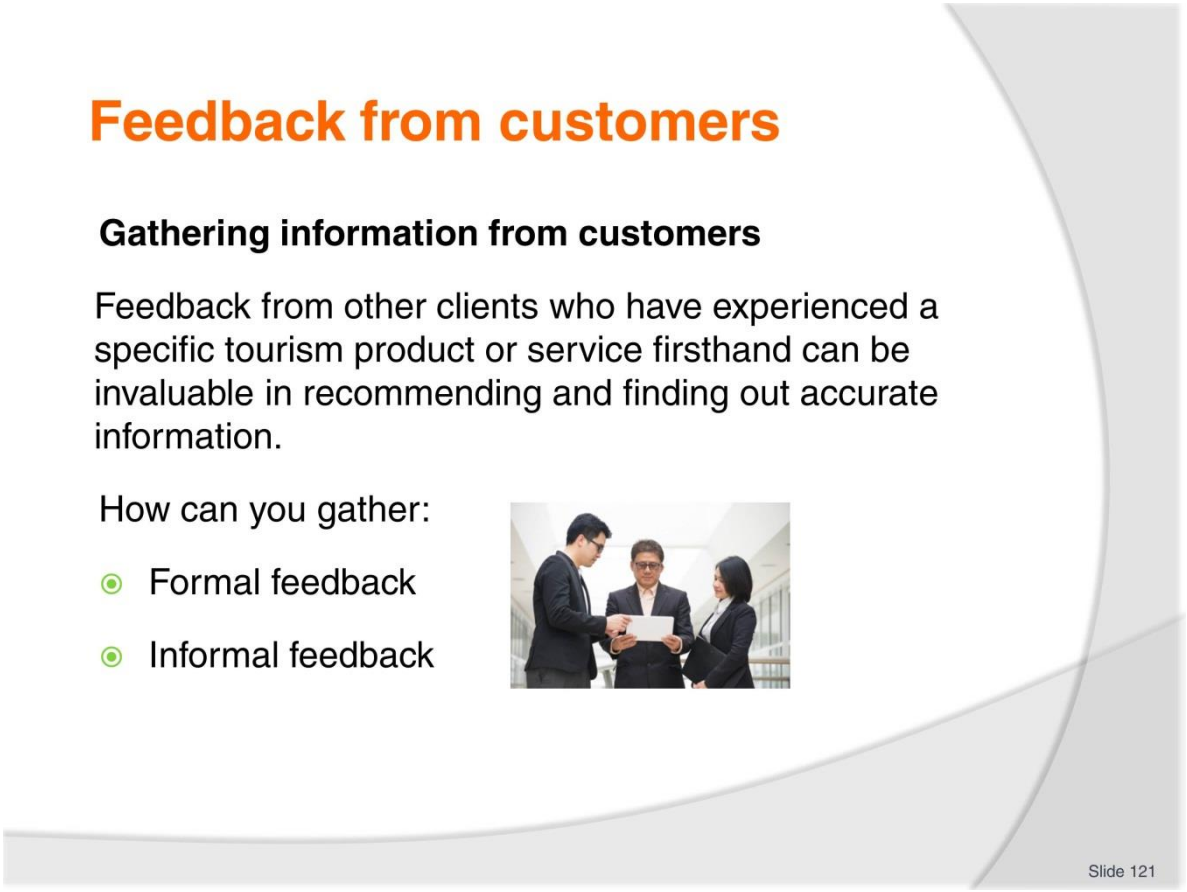
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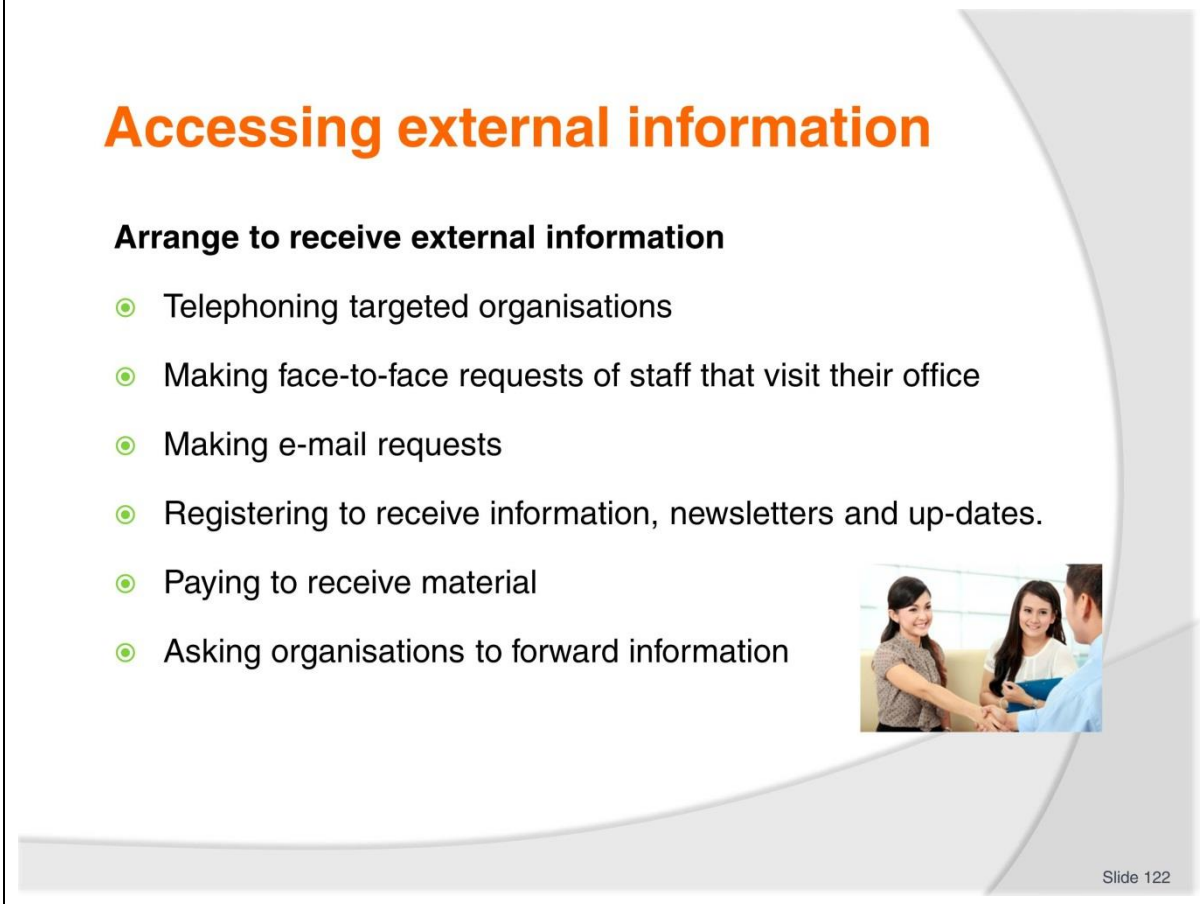

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| 120. | **Class Activity – Discuss**<br>• What information can come from each of these sources? |


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| 121. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss methods of receiving feedback<br>• What are the advantages of getting feedback in this manner? |

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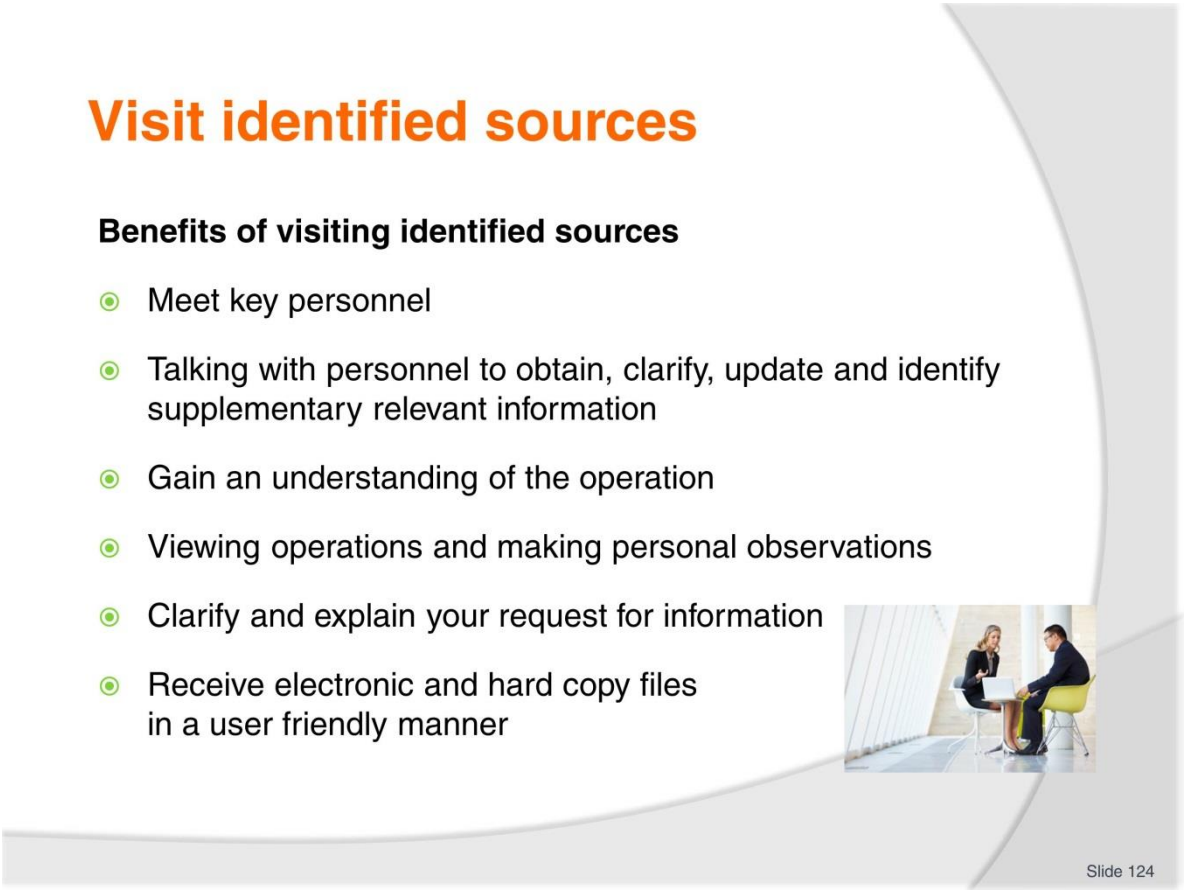
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| 122. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss activities associated with these points. |


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| 123. | **Class Activity – Discuss**<br>• What are the benefits of visiting identified sources? |

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| 124. | **Class Activity – Discuss**<br>• Discuss these benefits of visiting identified sources. |


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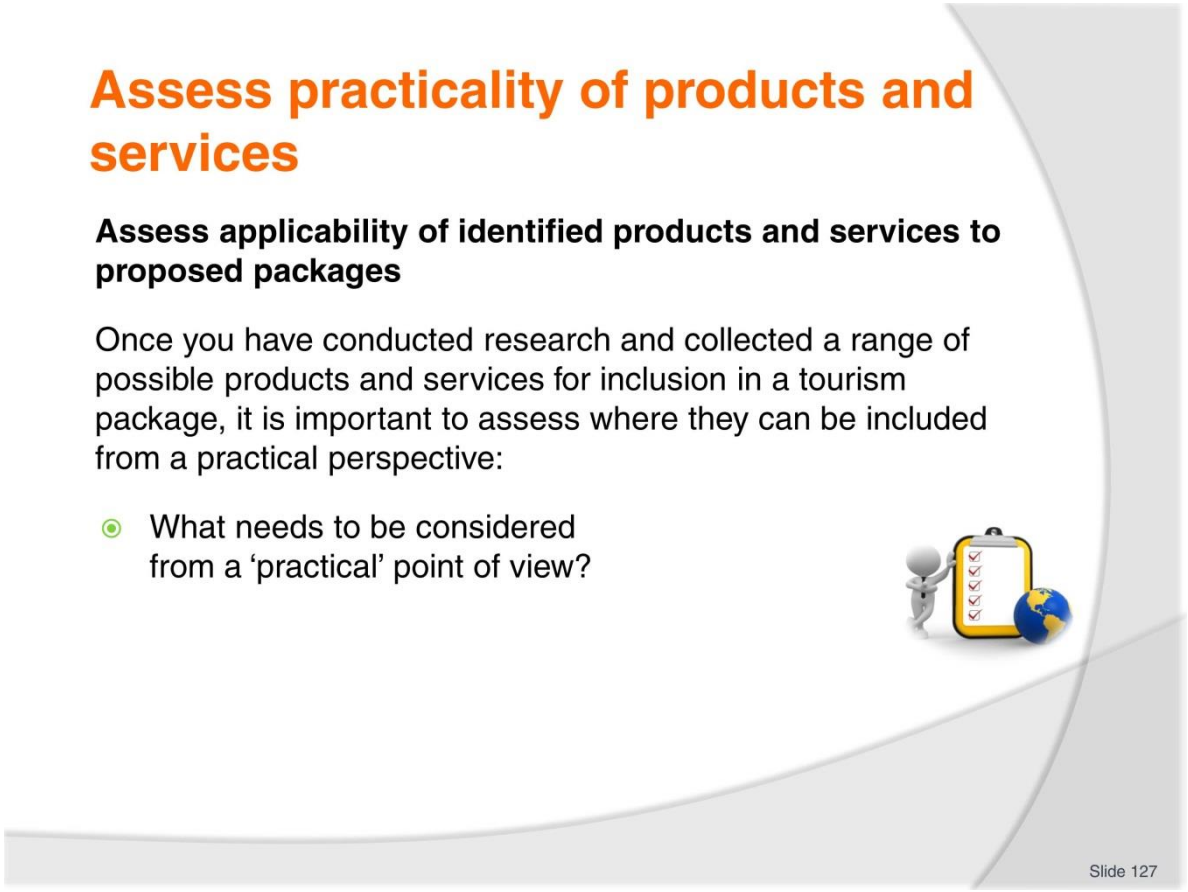
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| 125. | **Class Activity – Discuss**<br>• Discuss these benefits of visiting identified sources. |

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| 126. | **Class Activity – Discuss**<br>• Discuss these benefits of setting up networks?<br>• Who would you have in your network? |


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| 127. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss the question in the slide. |

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| 128. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss the activities associated with each point. |


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| 129. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss the activities associated with each point. |

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| 130. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss the activities associated with each point. |


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| 131. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss the activities associated with each point. |

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| 132. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss the activities associated with each point. |


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| 133. | **Class Activity – Identify suppliers & Research activity**<br>• Trainer to discuss the different types of companies under each point<br>• Audience to research companies under each of these points and identify the services they provide to travel agents and customers. |

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| 134. | **Class Activity – Identify preferred supplier agreement**<br>• Trainer to show example of a preferred supplier agreement.<br>• What needs to be considered when developing a preferred supplier agreement? |

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| 135. | **Class Activity – Discuss role of suppliers**<br>• What activities are performed under each of these points?<br>• How can you improve these individual roles? |

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| 136. | **Class Activity – Discuss role of suppliers**<br>• What activities are performed under each of these points?<br>• How can you improve these individual roles? |


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| 137. | **Class Activity – Discuss role of identifying suppliers**<br>• Discuss these activities<br>• Trainer to provide personal experiences in selecting suppliers. |

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| 138. | **Class Activity – Discuss role of identifying suppliers & Activity**<br>• Discuss these activities<br>• Trainer to provide personal experiences in selecting suppliers<br>• Complete Activity 9. |


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| 139. | Introduce topic.<br>**Class Activity – General Discussion**<br>Ask general questions:<br>• What is associated with creating packages? |

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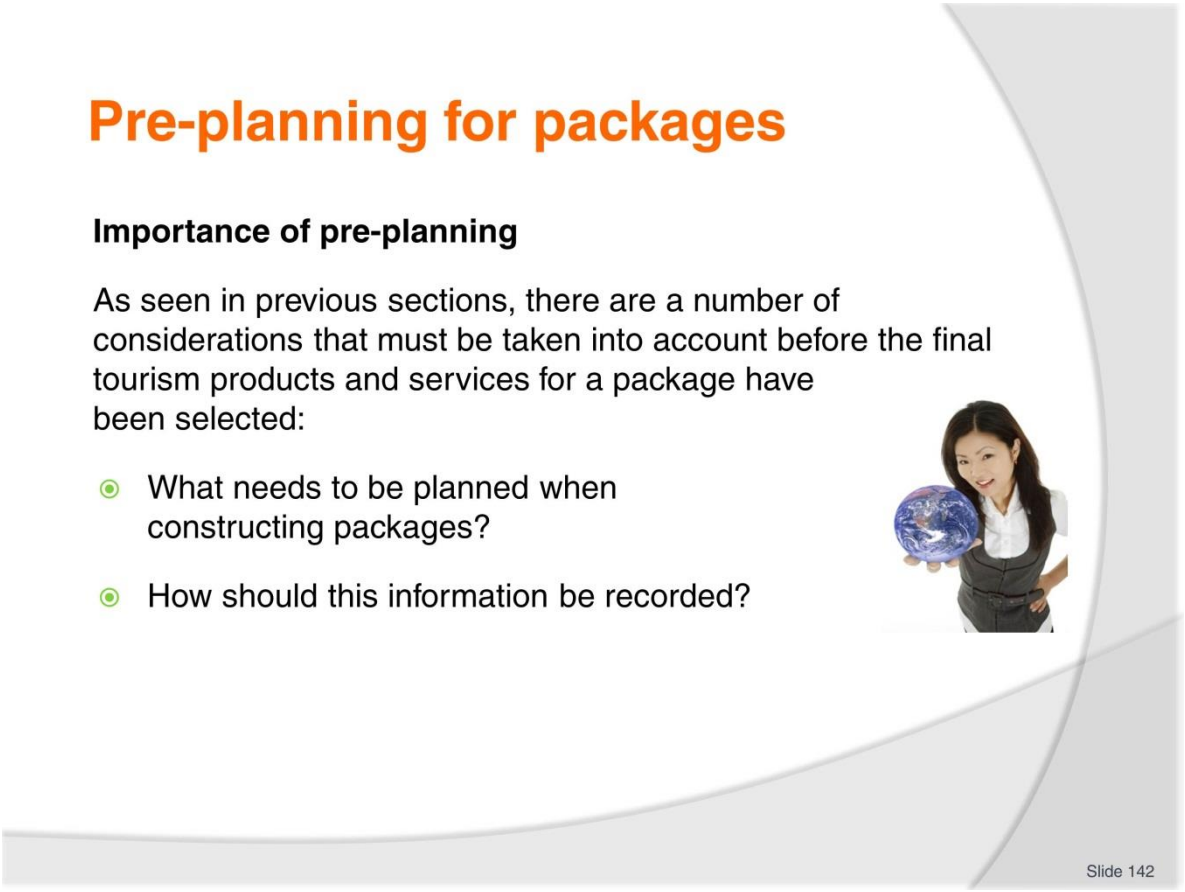
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| 140. | Trainer identifies the Performance Criteria for this Element, as listed on the slide. |


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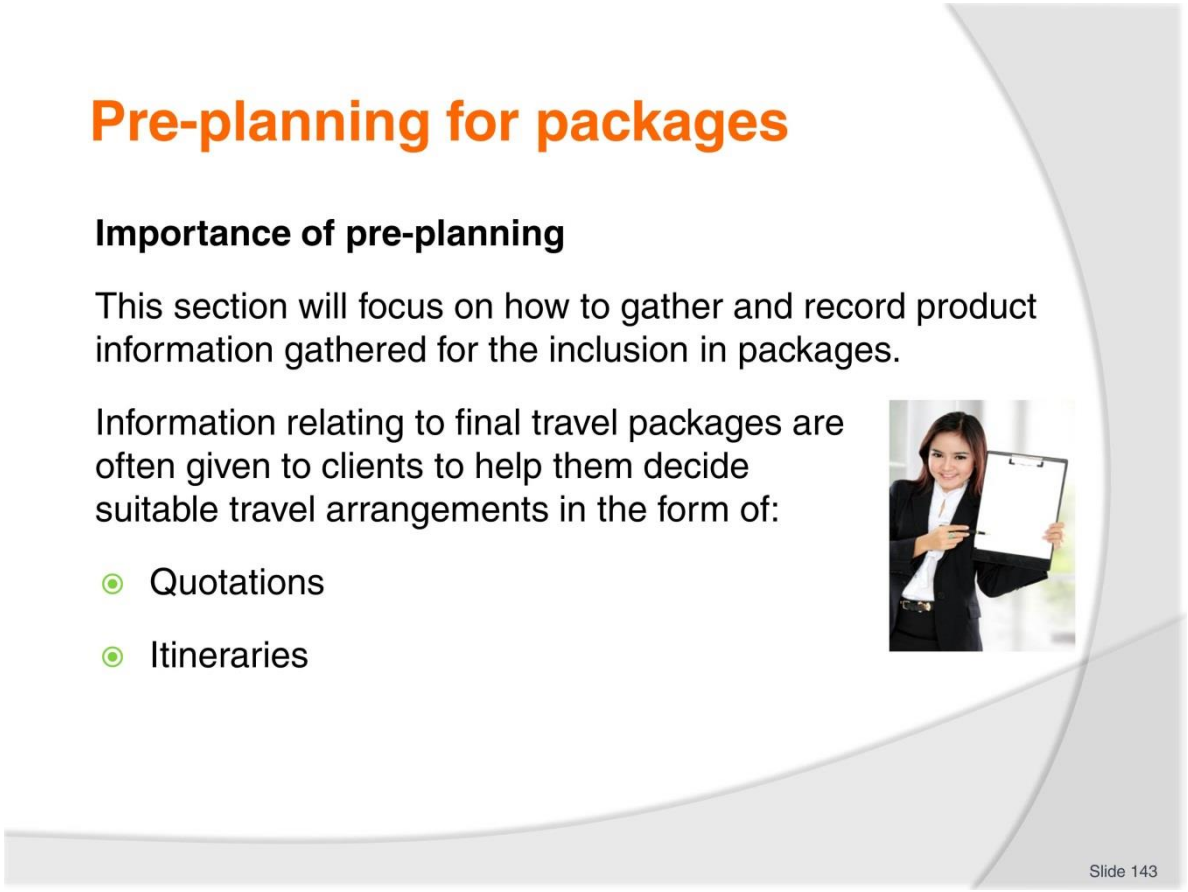
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| 141. | Trainer identifies the Performance Criteria for this Element, as listed on the slide. |

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| 142. | **Class Activity – Questions**<br>• Discuss the questions in the slide. |


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| 143. | **Class Activity – Questions**<br>• Briefly introduce the concept of quotations and itineraries. |

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| 144. | **Class Activity – Questions**<br>• How can information be recorded? |


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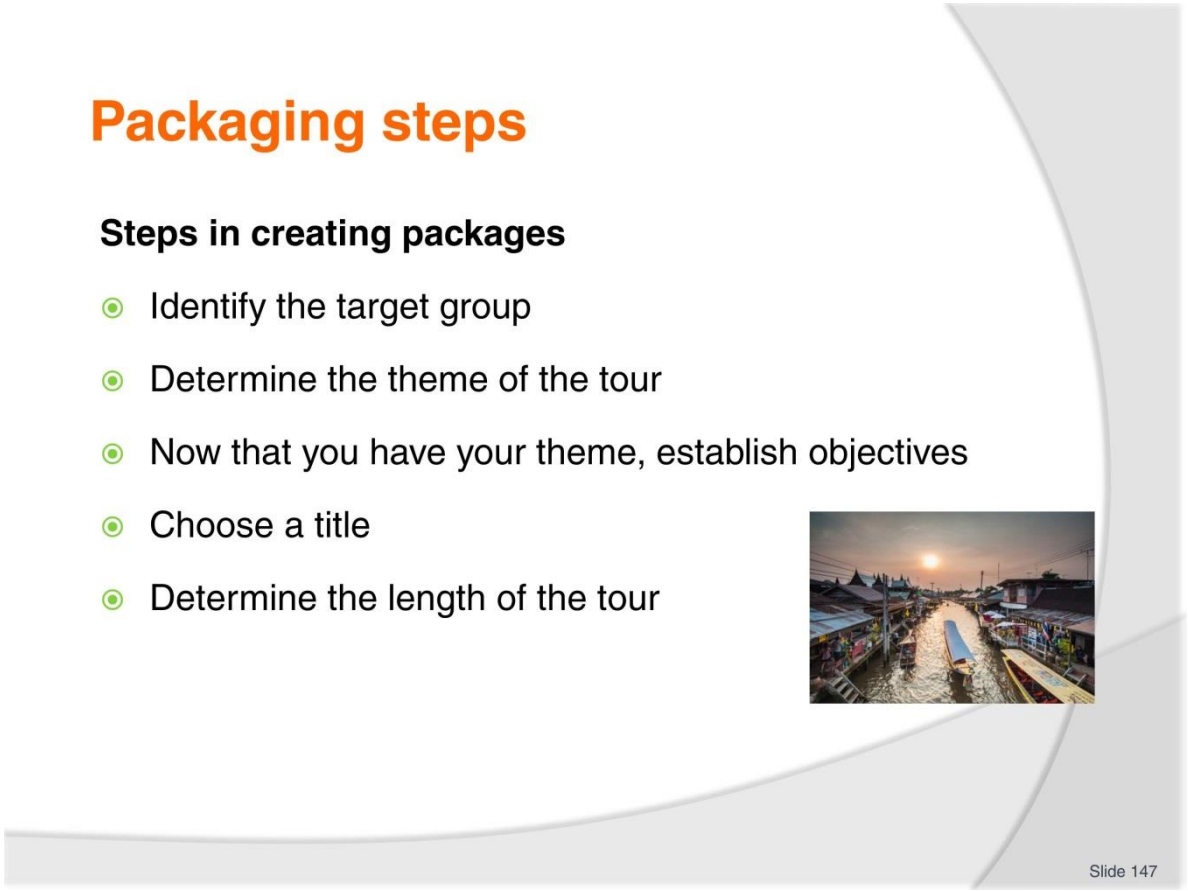



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| 145. | **Class Activity – Discussion and Questions & Activity**<br>• Discuss these considerations<br>• How would they affect the construction of a quotation?<br>• Complete Activity 10. |

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| 146. | **Class Activity – Discussion**<br>• Discuss these considerations<br>• What other considerations would you take into account? |

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| 147. | **Class Activity – Discussion**<br>• Discuss these steps<br>• They will be described in more detail in later sections. |

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| 148. | **Class Activity – Discussion**<br>• Discuss these steps<br>• They will be described in more detail in later sections. |


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| 149. | **Class Activity – Discussion**<br>Ask general questions:<br>• What are points for consideration for each? |

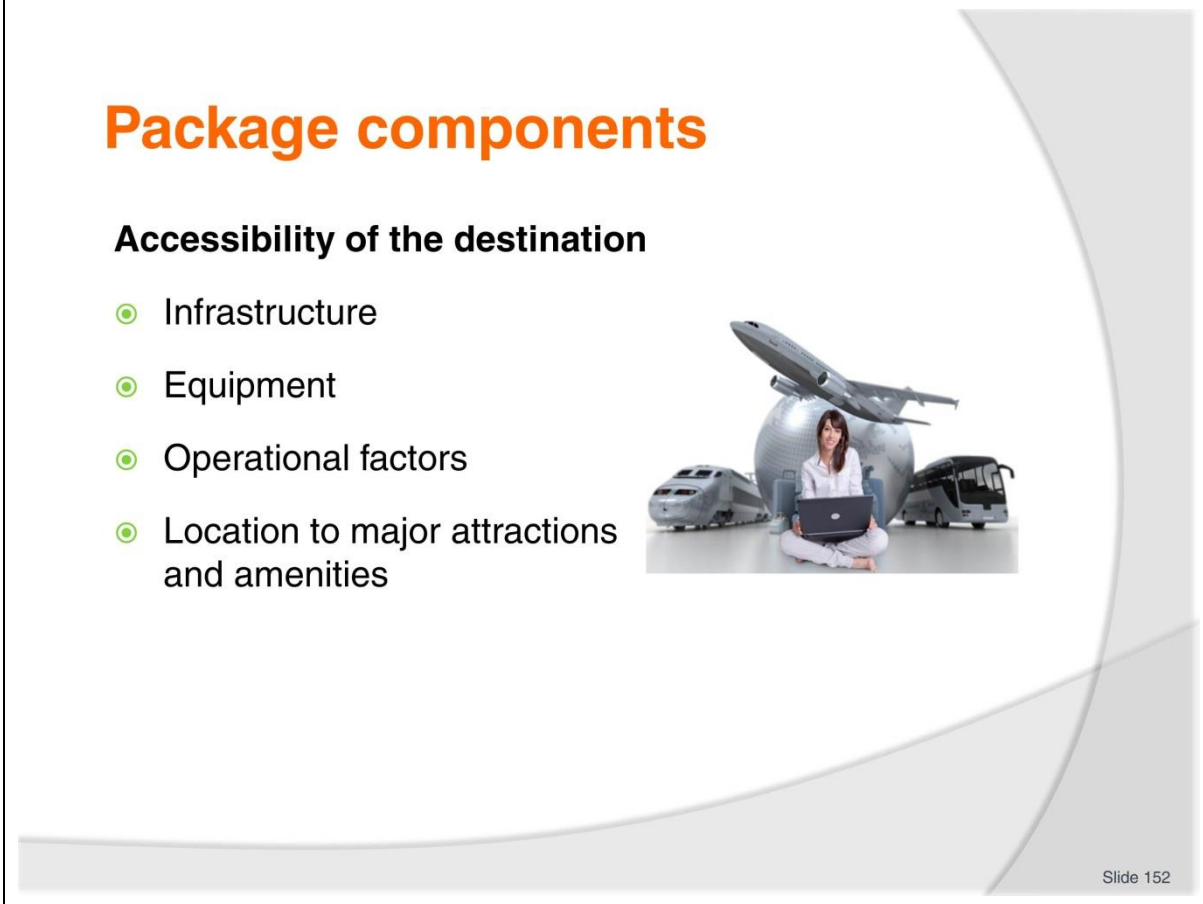
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| 150. | **Class Activity – Discussion**<br>Ask general questions:<br>• What are examples of each? |


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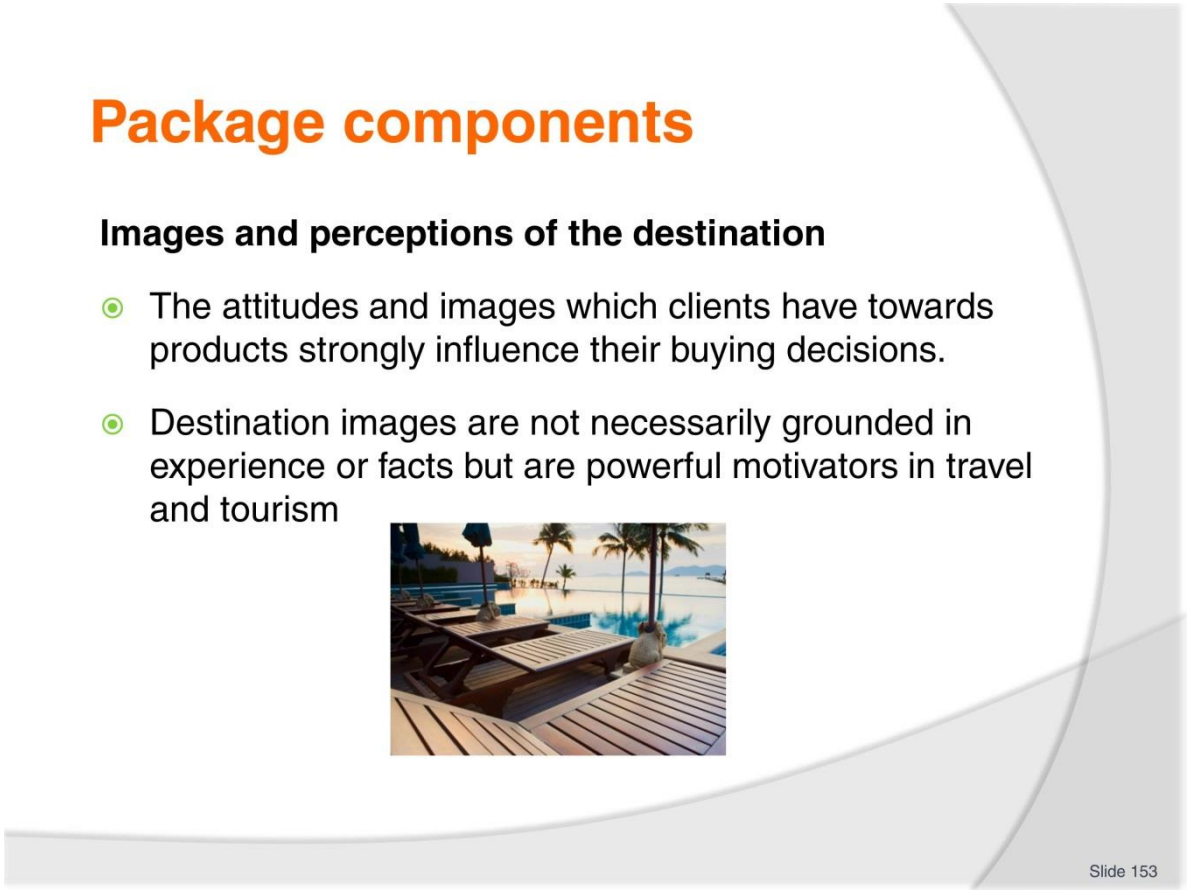
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| 151. | **Class Activity – Discussion**<br>Ask general questions:<br>• What are examples of each? |

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| 152. | **Class Activity – Discussion**<br>Ask general questions:<br>• What are examples of each? |


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| 153. | **Class Activity – Discussion**<br>Ask general questions:<br>• Why are images so powerful in selling tourism packages? |

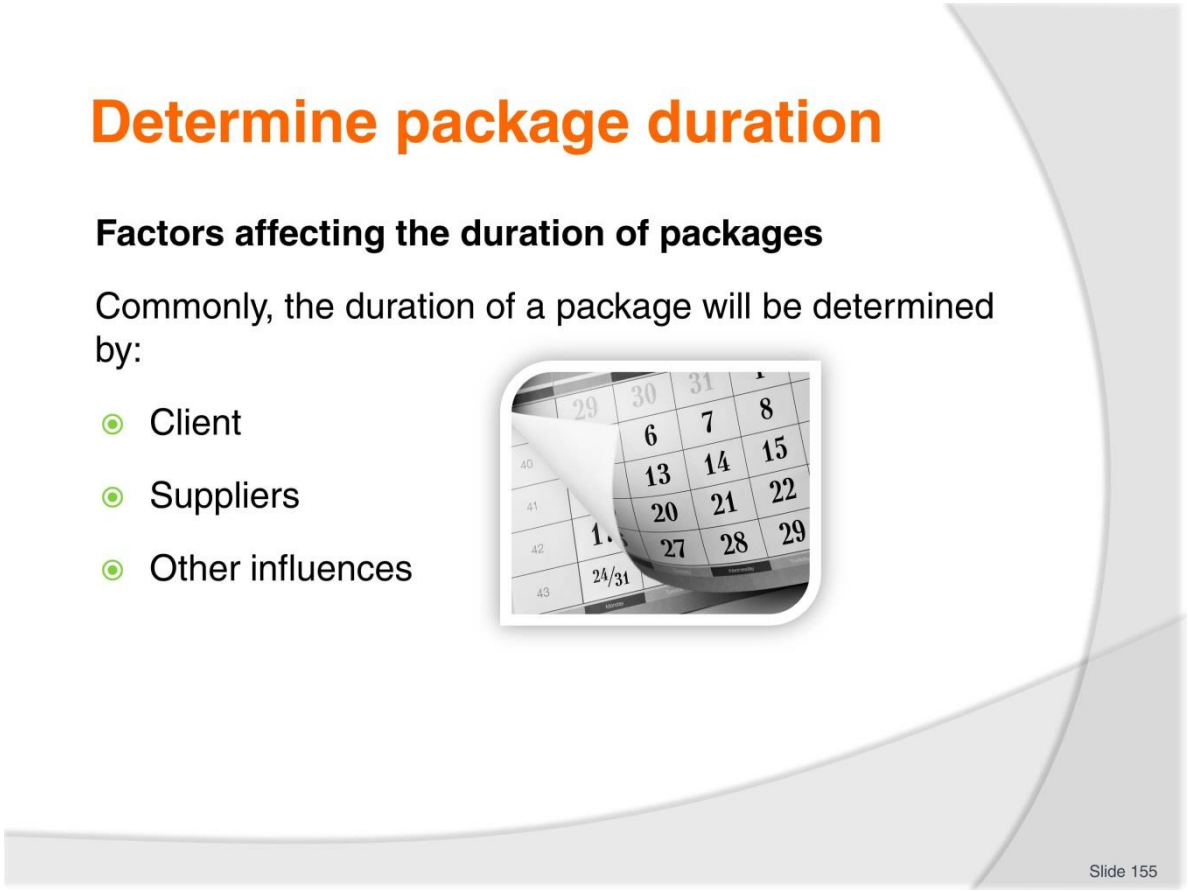
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| 154. | **Class Activity – Discussion & Activity**<br>Ask general questions:<br>• What are examples of each?<br>• What are essential inclusions for you when you travel?<br>• Complete Activity 11. |


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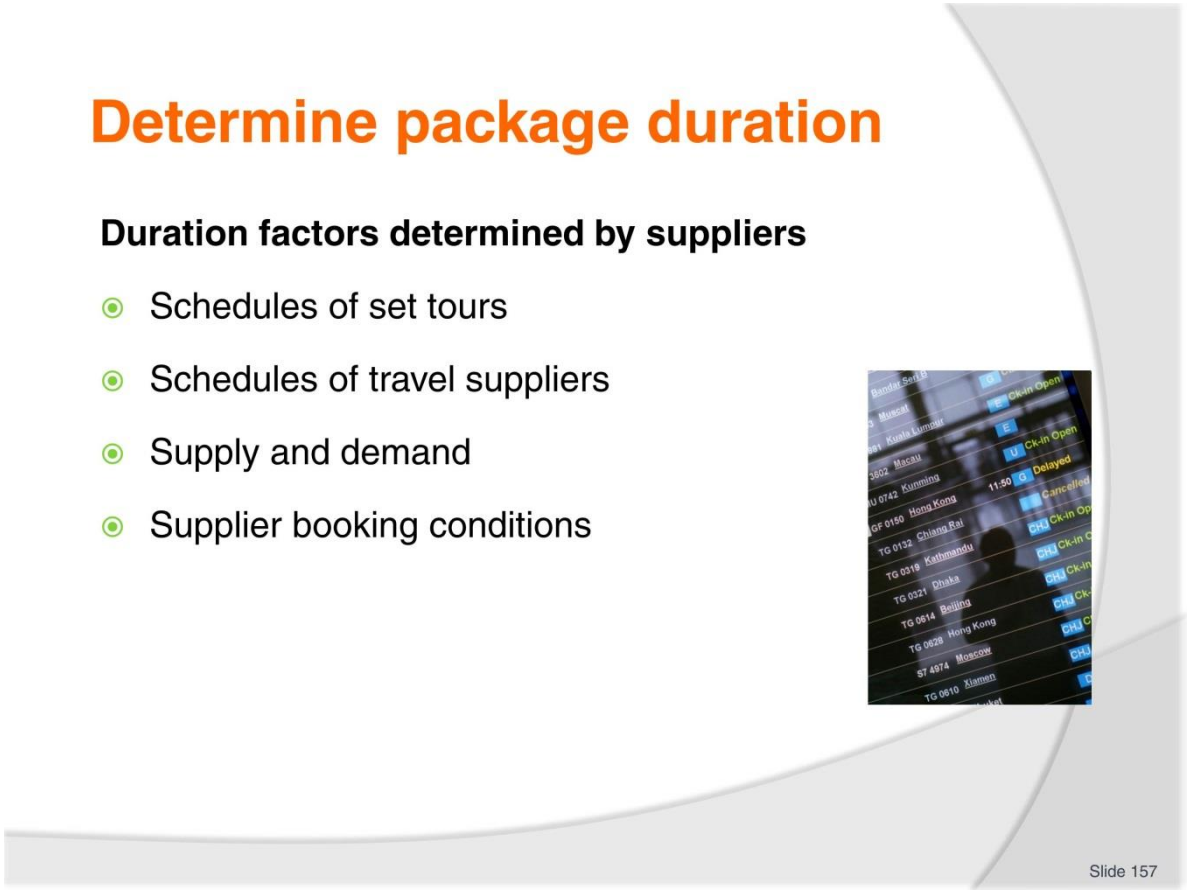

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| 155. | **Class Activity – Discussion**<br>Ask general questions:<br>• What are factors for each of these points? |

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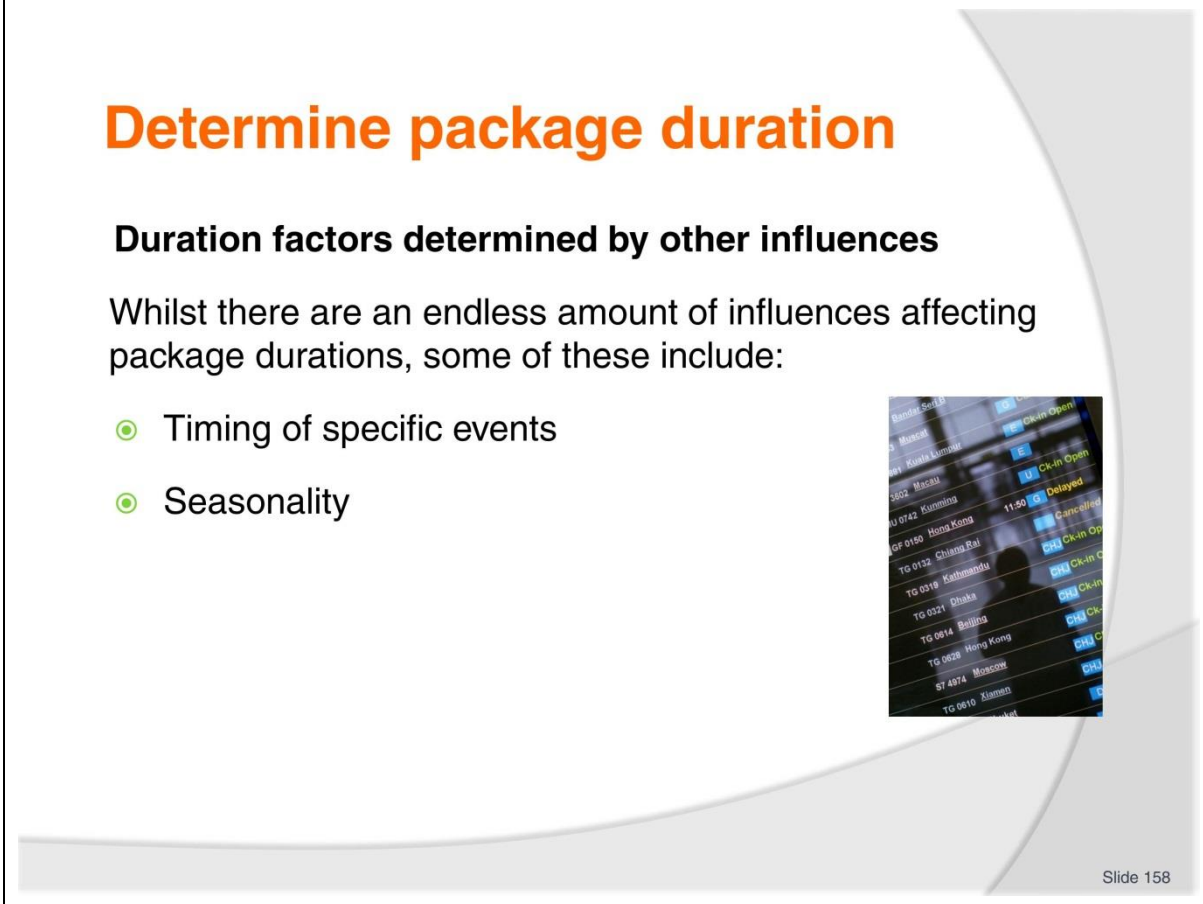

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| 156. | **Class Activity – Discussion**<br>Ask general questions:<br>• Provide examples of how these factors affect the duration of a tour. |


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| 157. | **Class Activity – Discussion**<br>Ask general questions:<br>• Provide examples of how these factors affect the duration of a tour. |

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| 158. | **Class Activity – Discussion**<br>Ask general questions:<br>• Provide examples of how these factors affect the duration of a tour<br>• What are other examples? |


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| 159. | **Class Activity – Discussion & Activity**<br>Ask general questions:<br>• Discuss the processes associated with these steps<br>• Complete Activity 12. |

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| 160. | **Class Activity – Discuss costs**<br>• What costs must be taken into account when developing proposals? |


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| 161. | **Class Activity – Discuss how to calculate costs**<br>• Discuss these activities<br>• Trainer to provide personal experiences in calculating costs. |

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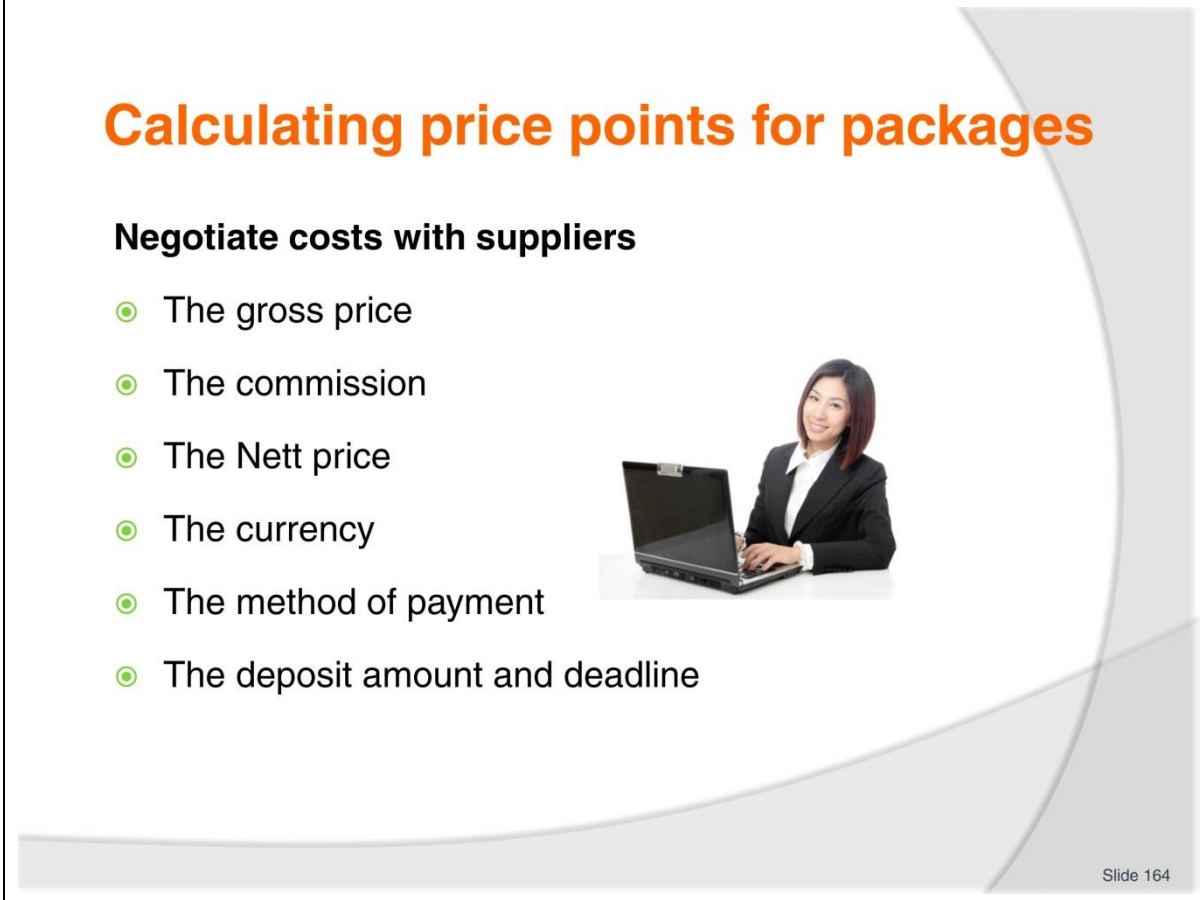

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| 162. | **Class Activity – Discuss how to calculate costs**<br>• Discuss these activities<br>• Trainer to provide personal experiences in calculating costs. |


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| 163. | **Class Activity – Discussion**<br>• Why are these considerations important? |

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| 164. | **Class Activity – Discuss how to negotiate costs with suppliers**<br>• Discuss these activities<br>• Trainer to provide personal experiences in negotiating costs with suppliers. |


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| 165. | **Class Activity – Discuss how to negotiate costs with suppliers**<br>• Discuss these activities<br>• Trainer to provide personal experiences in negotiating costs with suppliers. |

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| Slide No | Trainer Notes |
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| 166. | **Class Activity – Discuss how to negotiate costs with suppliers**<br>• What are other examples of direct costs? |


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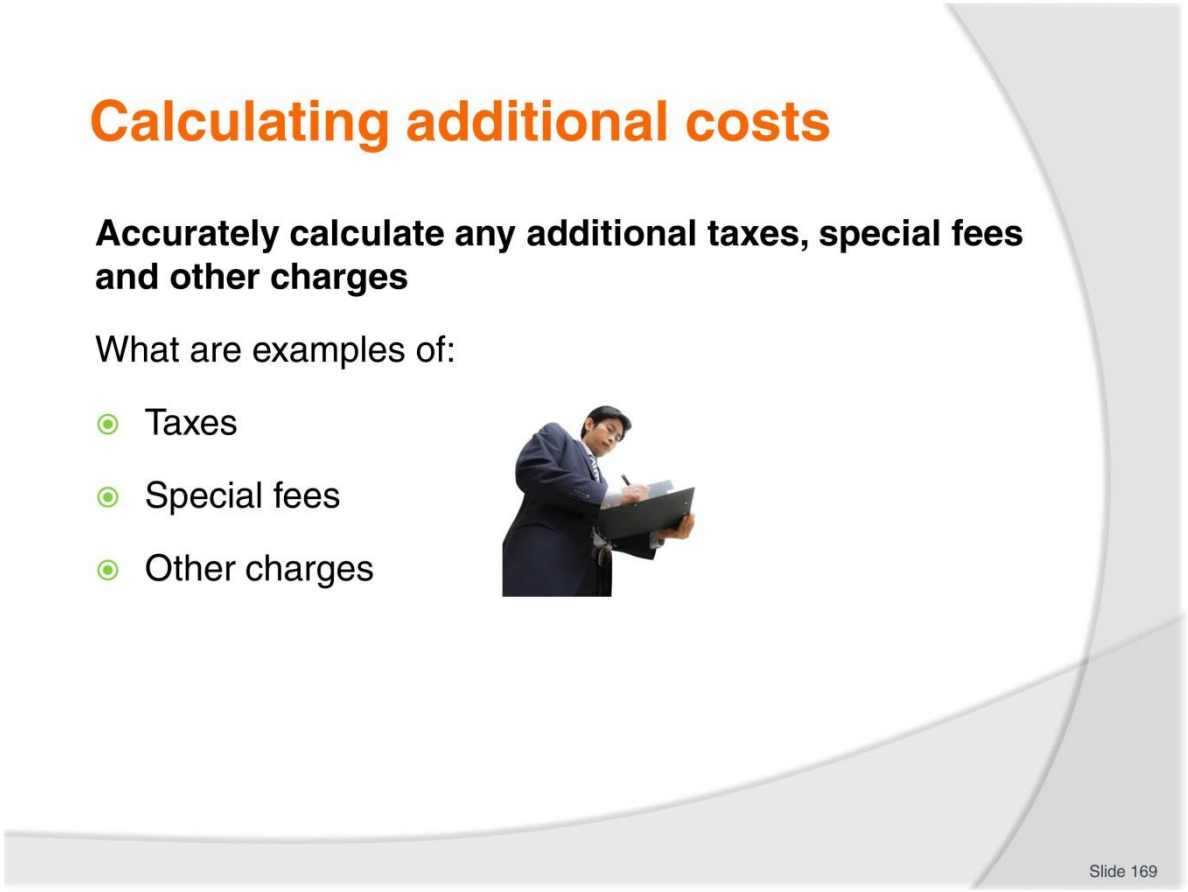
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| 167. | **Class Activity – Discuss how to calculate mark ups and commissions**<br>• Trainer to explain how to mark up costs<br>• Trainer to show and demonstrate costing software or tools<br>• Trainer to discuss the procedures associated with arranging and collecting commissions. |

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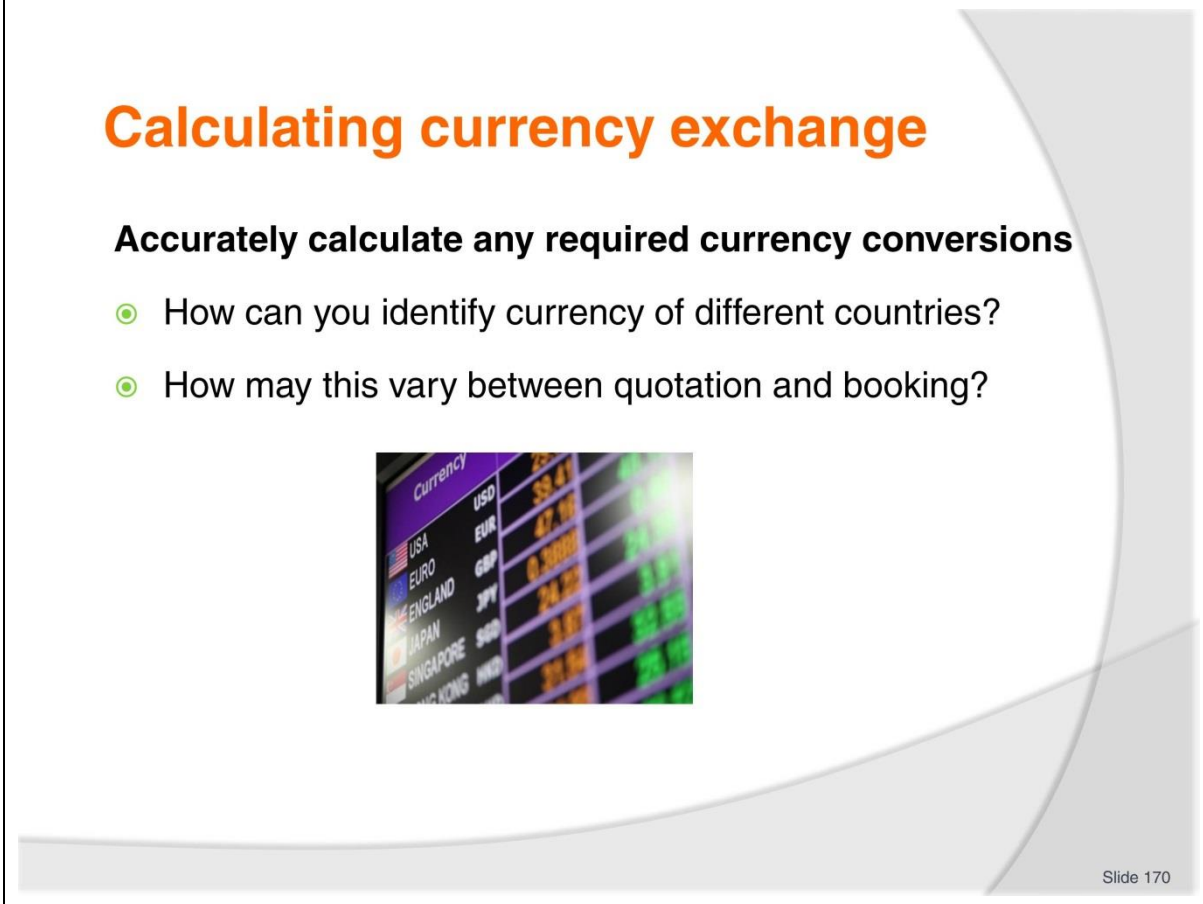

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| 168. | **Class Activity – Discussion**<br>• What are the cost of these services in your country? |


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| 169. | **Class Activity – Discuss questions**<br>• Discuss questions in the slide. |

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| 170. | **Class Activity – Discuss questions**<br>• Discuss questions in the slide. |


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| 171. | **Class Activity – Discuss questions**<br>• Discuss questions in the slide. |

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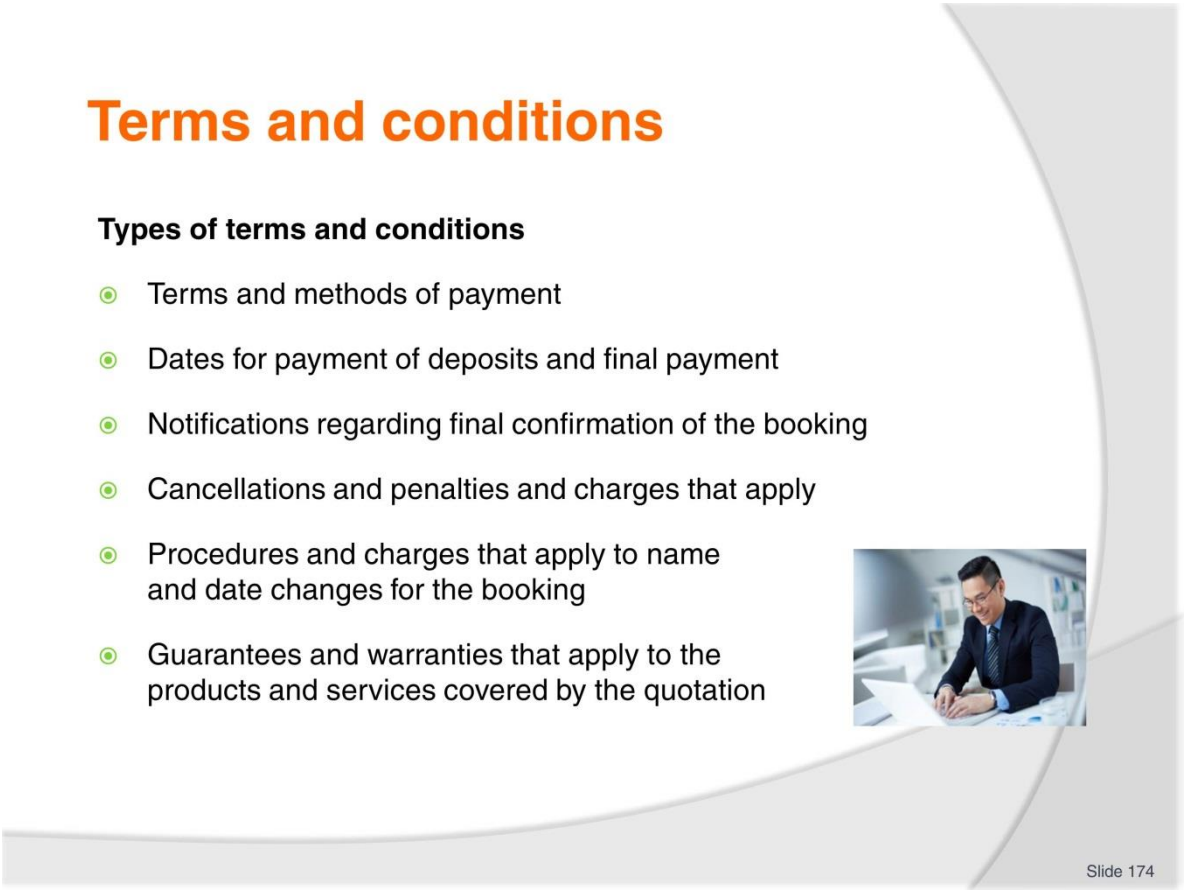

| Slide No | Trainer Notes |
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| 172. | **Class Activity – Discuss how to accurately calculate and check all product and service cost components & Activity**<br>• Trainer to explain how to check costs<br>• Trainer to show and demonstrate costing software or tools<br>• Complete Activity 13. |


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| 173. | **Class Activity – List terms and conditions**<br>• Audience to prepare list of all possible terms and conditions affecting travel bookings and arrangements. |

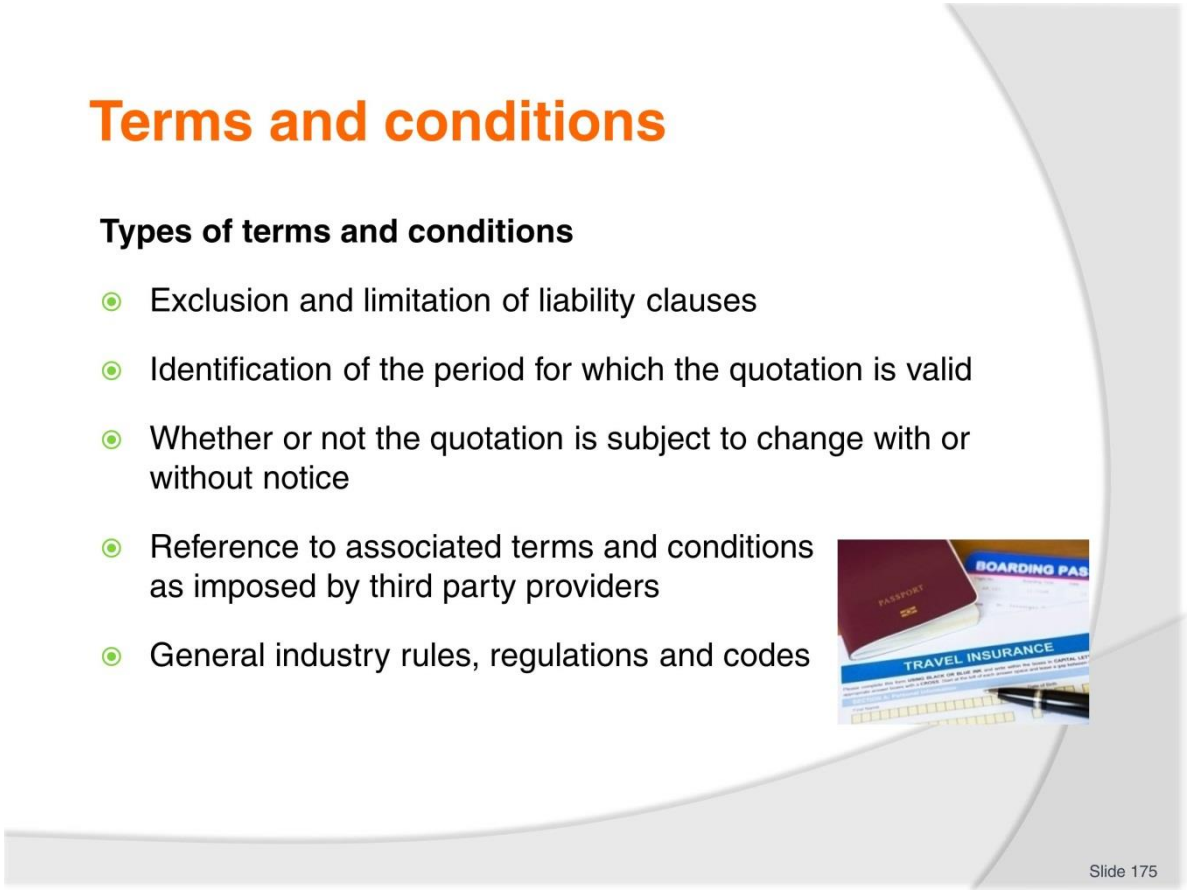
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| 174. | **Class Activity – Discuss terms and conditions**<br>• What is the purpose of each of these terms and conditions?<br>• What are examples / stipulations of each of these terms and conditions? |


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| 175. | **Class Activity – Discuss terms and conditions**<br>• What is the purpose of each of these terms and conditions?<br>• What are examples / stipulations of each of these terms and conditions? |

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| 176. | **Class Activity – Discuss booking conditions**<br>• What information would you need to discuss for each of these points? |


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| 177. | **Class Activity – Discuss booking conditions**<br>• What information would you need to discuss for each of these points? |

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| 178. | **Class Activity – Discuss booking conditions**<br>• What information would you need to discuss for each of these points? |


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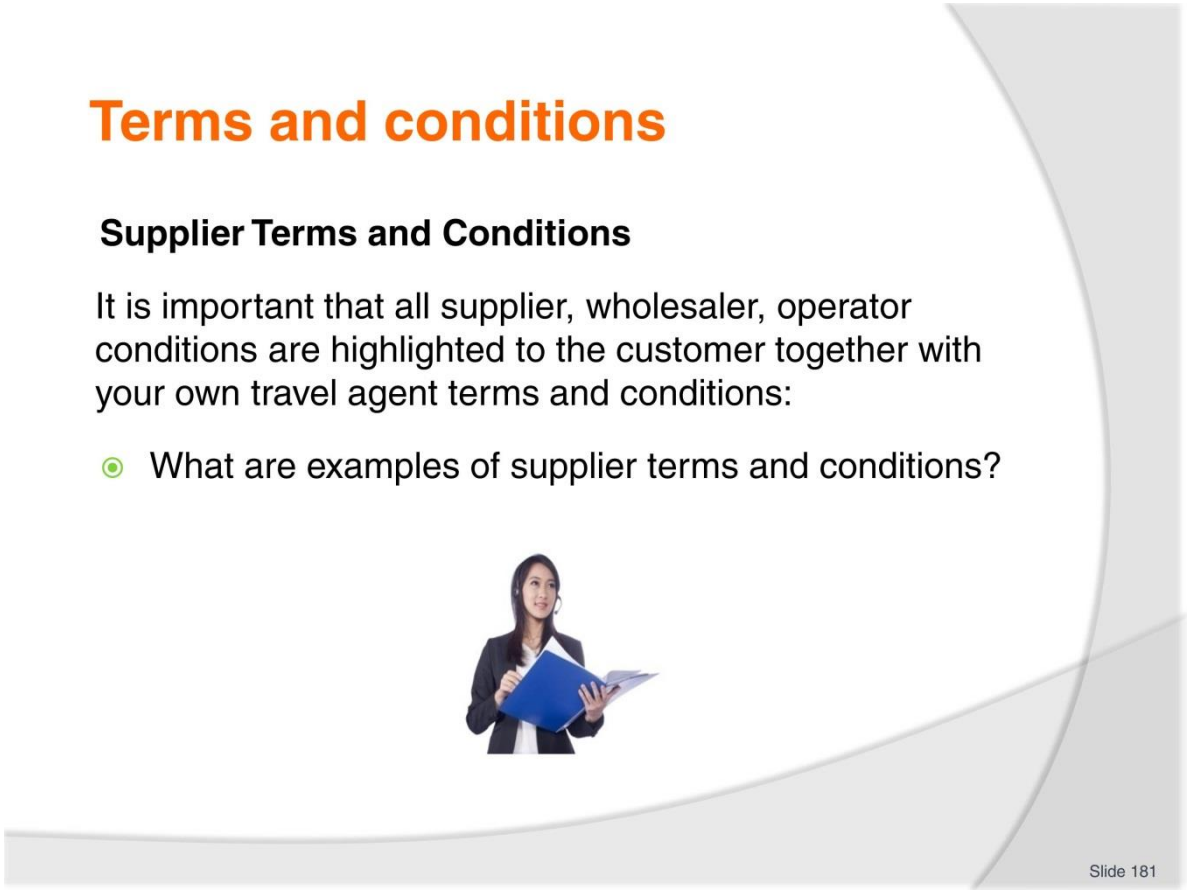
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| 179. | **Class Activity – Discuss booking conditions**<br>• What information would you need to discuss for each of these points? |

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| 180. | **Class Activity – Discuss terms and conditions**<br>• What is the purpose of each of these terms and conditions?<br>• What are examples / stipulations of each of these terms and conditions? |


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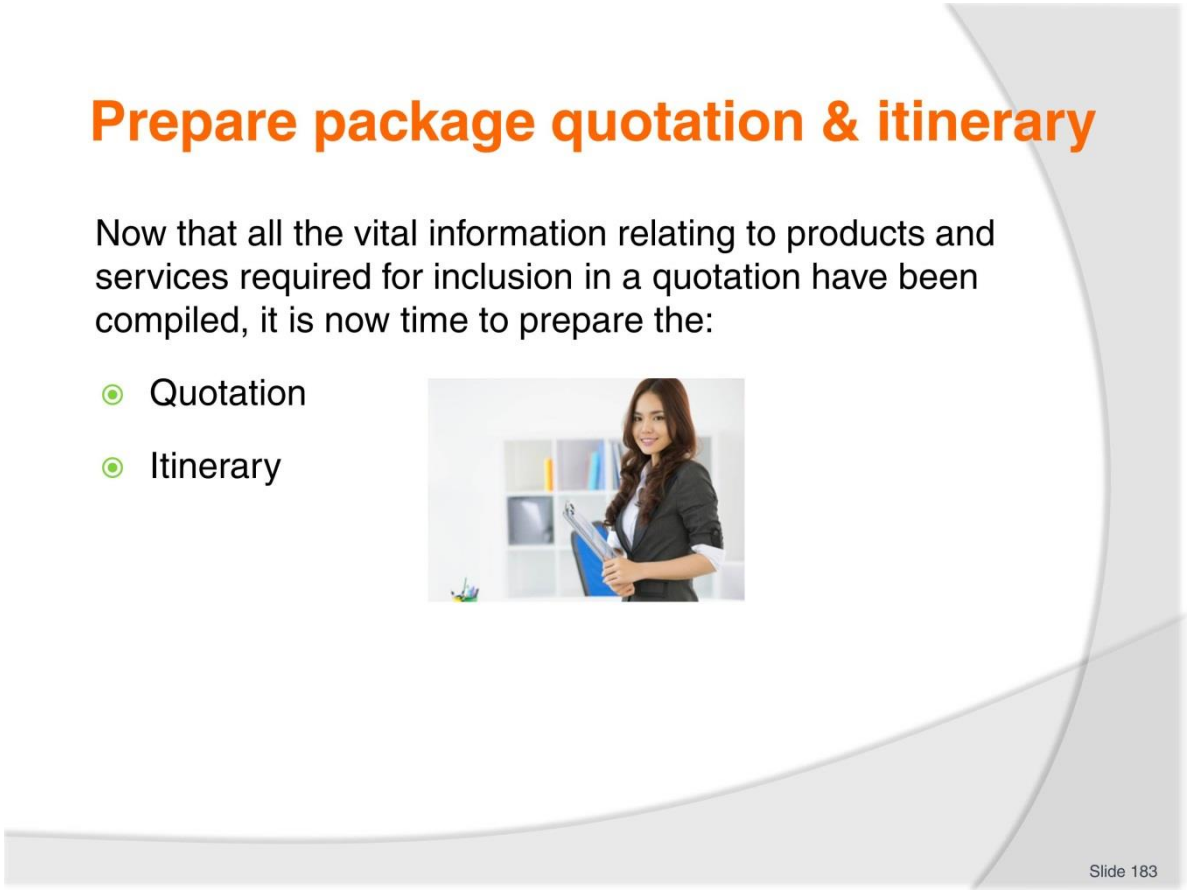
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| 181. | **Class Activity – Discuss questions**<br>• Discuss questions in the slide. |

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| Slide No | Trainer Notes |
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| 182. | **Class Activity – Discuss terms and conditions & Activity**<br>• What is the purpose of each of these terms and conditions?<br>• What are examples / stipulations of each of these terms and conditions?<br>• Complete Activity 14. |


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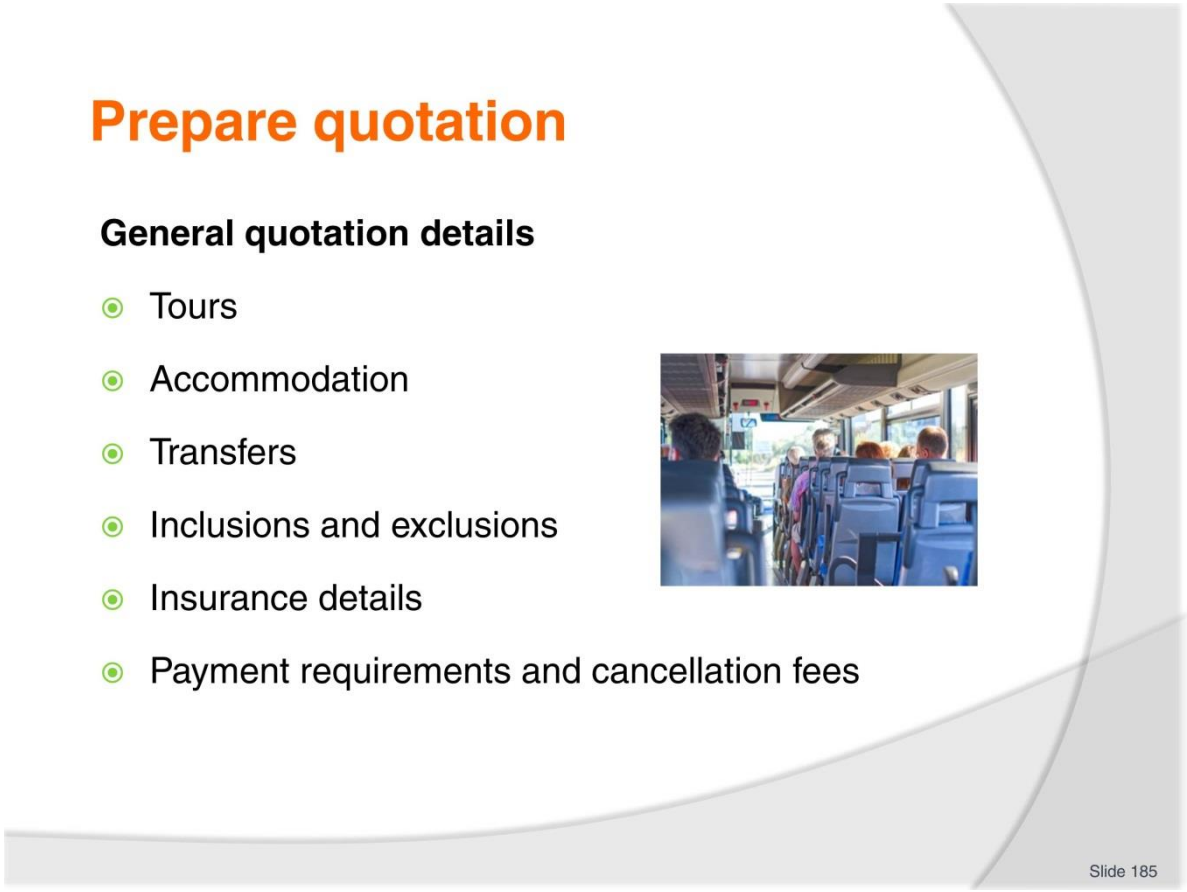
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| 183. | **Class Activity – Prepare draft quotation (relevant for Slides 58-62)**<br>• What is the purpose of these documents?<br>• How do these two documents differ?<br>• What is included in these documents? |

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| 184. | **Class Activity – View & research quotation**<br>• Trainer to show examples of quotations<br>• Participants can conduct internet research and download examples of quotations. |


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| 185. | **Class Activity – View & research quotation**<br>• Trainer to show examples of quotations<br>• Participants can conduct internet research and download examples of quotations. |

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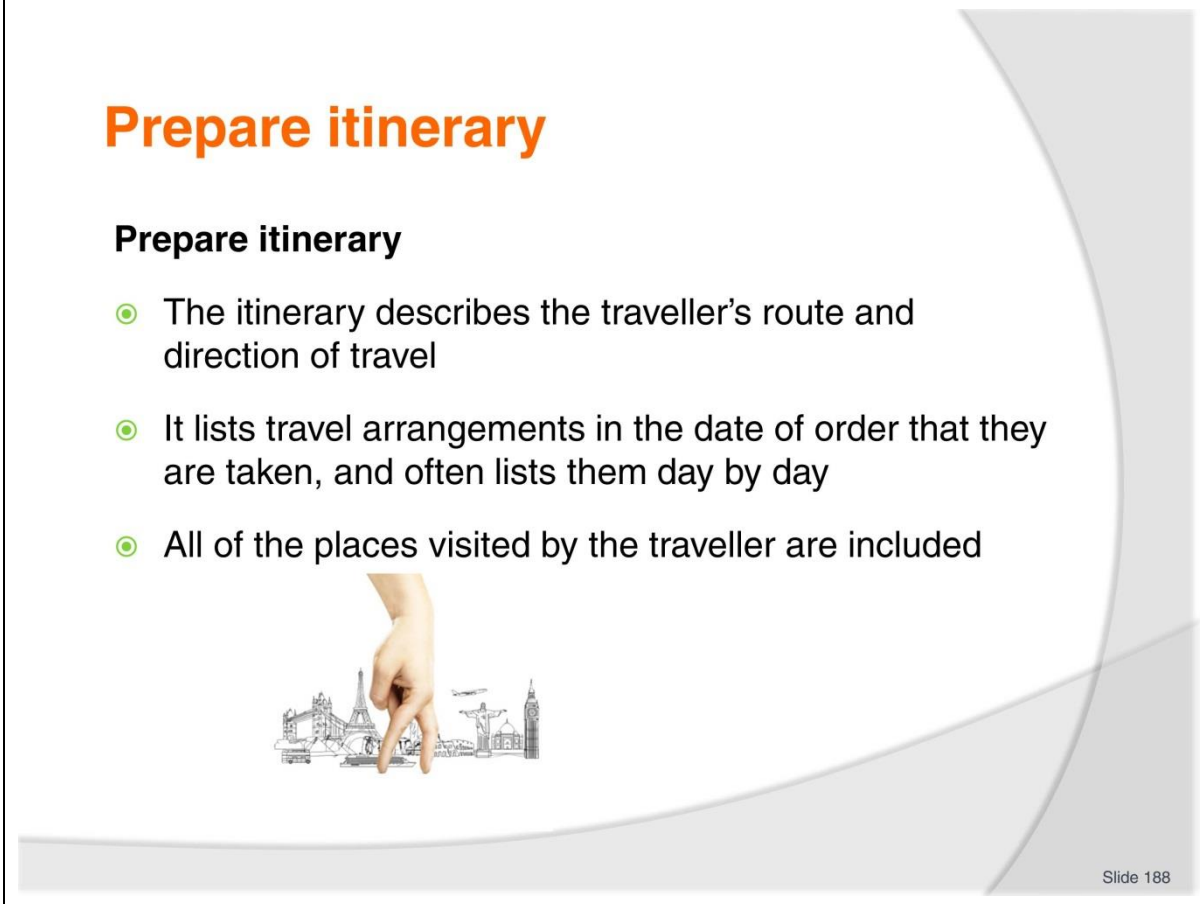


| Slide No | Trainer Notes |
| --- | --- |
| 186. | **Class Activity – View & research quotation**<br>• Trainer to show examples of quotations<br>• Participants can conduct internet research and download examples of quotations. |


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| Slide No | Trainer Notes |
| --- | --- |
| 187. | **Class Activity – View & research quotation**<br>• Trainer to show examples of quotations<br>• Participants can conduct internet research and download examples of quotations<br>• Discuss the question in the slide<br>• Refer to criteria 3.6 Prepare draft itinerary for packages for examples. |

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| Slide No | Trainer Notes |
| --- | --- |
| 188. | **Class Activity – Discussion**<br>• What information is contained in an itinerary? |


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| Slide No | Trainer Notes |
| --- | --- |
| 189. | **Class Activity – View & research itineraries**<br>• Trainer to show examples of itineraries<br>• Participants can conduct internet research and download examples of itineraries. |

| Slide |
|---|




| Slide No | Trainer Notes |
|---|---|
| 190. | **Class Activity – View & research itineraries & Activity**<br>• Trainer to show examples of itineraries<br>• Participants can conduct internet research and download examples of itineraries<br>• Complete Activity 15. |


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| Slide No | Trainer Notes |
| --- | --- |
| 191. | **Class Activity – Discussion**<br>Ask general questions:<br>• How can you monitor sales?<br>• What do you want to monitor? |

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| Slide No | Trainer Notes |
| --- | --- |
| 192. | **Class Activity – Discussion**<br>Ask general questions:<br>• What is the purpose of these activities?<br>• What are associated with these activities? |


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| Slide No | Trainer Notes |
| --- | --- |
| 193. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss these activities. |

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| Slide No | Trainer Notes |
| --- | --- |
| 194. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss these activities. |


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| Slide No | Trainer Notes |
| --- | --- |
| 195. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss these activities. |

| Slide |
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|  |



| Slide No | Trainer Notes |
| --- | --- |
| 196. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss these activities. |


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| Slide No | Trainer Notes |
| --- | --- |
| 197. | **Class Activity – Discussion & Activity**<br>Ask general questions:<br>• What are examples of information you would collect for each type of data?<br>• How can you collect it?<br>• Complete Activity 16. |

| Slide |
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|  |



| Slide No | Trainer Notes |
| --- | --- |
| 198. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss these activities. |


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| Slide No | Trainer Notes |
| --- | --- |
| 199. | **Class Activity – Discussion**<br>Ask general questions:<br>• Discuss the question in the slide<br>• Refer to criteria 3.8 Plan marketing activities for packages for examples. |

| Slide |
|---|




| Slide No | Trainer Notes |
|---|---|
| 200. | **Class Activity – Discussion**<br>For each type of promotional method discuss:<br>• Its purpose<br>• Advantages / disadvantages<br>• Activities associated with it. |


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| Slide No | Trainer Notes |
| --- | --- |
| 201. | **Class Activity – Discussion & Activity**<br>**For each type of promotional method discuss:**<br>• Its purpose<br>• Advantages / disadvantages<br>• Activities associated with it<br>• Complete Activity 17. |

**Slide**




| Slide No | Trainer Notes |
|---|---|
| 202. | **Class Activity – Discussion**<br>• What training activities can take place? |


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|  |

| Slide No | Trainer Notes |
| --- | --- |
| 203. | **Class Activity – Discussion**<br>• What else dictates the need for training?<br>• Is there any scheduled training that takes place each day, month, year? |

| Slide |
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|  |

| Slide No | Trainer Notes |
| --- | --- |
| 204. | **Class Activity – Discussion & Activity**<br>Ask general questions:<br>• Discuss the question in the slide<br>• Refer to TM Page 146 for examples<br>• Complete Activity 18. |


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| Slide |
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| Slide No | Trainer Notes |
| --- | --- |
| 205. | **Class Activity – Discussion & Activity**<br>Ask general questions:<br>• Discuss the questions in the slide<br>• Complete Activity 19. |

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# Recommended training equipment

- Access to Global Distribution Systems:
  - Travelport (Galileo, & Apollo)
  - Travelport (Worldspan)
  - Amadeus
  - Sabre
  - Booking conditions
  - Computer and internet access
- Computerised systems
- Customer information recording forms
- Examples of travel documentation
- Examples of industry statistics
- Examples of information relating to different tourism businesses:
  - Transportation
  - Airlines
  - Cruise operators
  - Railway operators
  - Bus lines
  - Car rental businesses
  - Limousine hire
  - Taxis
  - Travel insurance providers
  - Finance providers
  - Currency exchange
  - Conference and similar venues
  - Interpreters
  - Hotels and motels
  - Guest houses
  - Bed and breakfasts
  - Caravan parks and camping grounds
  - Resorts
  - Time share properties
  - Apartments, villas and cottages
  - Conference and exhibition centres

- Museums and galleries
- National parks, wildlife parks and gardens
- Theme parks
- Heritage sites and centres
- Sport and activity centres
- Aquarium and zoos
- Tour Operators
- Inbound Tour Wholesaler
- Outbound Tour Wholesaler
- Retail Travel Agents
- Local, regional and national information services
- Ministries of Tourism
- Tourism Boards

- Examples of types of information:
  - Destination information
  - Local community information
  - Tours
  - Attractions
  - Activities
  - History
  - Geographical features
  - Local customs and culture
  - Climate
  - Accommodation
  - Amenities and services
- Examples of different information formats:
  - Brochures, flyers and pamphlets
  - Product manuals
  - Supplier information and sales kits
  - Confidential and general industry tariffs
  - Preferred contracts or agreements
  - Clue cards
  - Fare sheets
  - Industry publications, advices and notices
  - Videos
  - Posters


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  - Timetables
  - Atlases and maps
  - Travel literature
  - Travel Guides
  - Newspapers and magazines
  - Internal databases
  - Online product training modules
- Final contracts / quotations
- Formal quotation and itinerary templates
- Industry codes:
  - Airport codes
  - Airline codes
  - Tour codes
  - Room types
  - Service codes
- Manual filing systems
- Marketing objectives
- Media Releases
- Policies and procedures
- Quotation examples
- Terms and conditions including:
  - Travel Agent Terms and Conditions
  - Supplier Terms and Conditions
  - Product or service provider terms and conditions

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# Instructions for Trainers for using PowerPoint – Presenter View

Connect your laptop or computer to your projector equipment as per manufacturers' instructions.

In PowerPoint, on the **Slide Show** menu, click **Set up Show**.

Under Multiple monitors, select the Show Presenter View check box.

In the **Display slide show** on list, click the monitor you want the slide show presentation to appear on.

Source: http://office.microsoft.com

**Note:**

In Presenter View:

You see your notes and have full control of the presentation

Your trainees only see the slide projected on to the screen

**More Information**

You can obtain more information on how to use PowerPoint from the Microsoft Online Help Centre, available at:
http://office.microsoft.com/training/training.aspx?AssetID=RC011298761033

**Note Regarding Currency of URLs**

Please note that where references have been made to URLs in these training resources trainers will need to verify that the resource or document referred to is still current on the internet. Trainers should endeavour, where possible, to source similar alternative examples of material where it is found that either the website or the document in question is no longer available online.

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# Appendix – ASEAN acronyms

| | |
|---|---|
| **AADCP** | ASEAN – Australia Development Cooperation Program |
| **ACCSTP** | ASEAN Common Competency Standards for Tourism Professionals |
| **AEC** | ASEAN Economic Community |
| **AMS** | ASEAN Member States |
| **ASEAN** | Association of Southeast Asian Nations |
| **ASEC** | ASEAN Secretariat |
| **ATM** | ASEAN Tourism Ministers |
| **ATPMC** | ASEAN Tourism Professionals Monitoring Committee |
| **ATPRS** | ASEAN Tourism Professional Registration System |
| **ATFTMD** | ASEAN Task Force on Tourism Manpower Development |
| **CATC** | Common ASEAN Tourism Curriculum |
| **MRA** | Mutual Recognition Arrangement |
| **MTCO** | Mekong Tourism Coordinating office |
| **NTO** | National Tourism Organisation |
| **NTPB** | National Tourism Professional Board |
| **RQFSRS** | Regional Qualifications Framework and Skills Recognition System |
| **TPCB** | Tourism Professional Certification Board |

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& hospitality
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Australian
Aid

# Source and package tourism products and services

## D2.TCS.CL5.22
## D2.TTA.CL2.18

## Trainee Manual











Australian Aid

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William Angliss Institute

Specialist centre for foods, tourism & hospitality

# Source and package tourism products and services

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## D2.TTA.CL2.18

## Trainee Manual

Australian Aid
asean
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File name: TM_Source_&_package_tourism_products_&_services_230415

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# Introduction to trainee manual

## To the Trainee

Congratulations on joining this course. This Trainee Manual is one part of a 'toolbox' which is a resource provided to trainees, trainers and assessors to help you become competent in various areas of your work.

The 'toolbox' consists of three elements:

- A Trainee Manual for you to read and study at home or in class
- A Trainer Guide with Power Point slides to help your Trainer explain the content of the training material and provide class activities to help with practice
- An Assessment Manual which provides your Assessor with oral and written questions and other assessment tasks to establish whether or not you have achieved competency.

The first thing you may notice is that this training program and the information you find in the Trainee Manual seems different to the textbooks you have used previously. This is because the method of instruction and examination is different. The method used is called Competency based training (CBT) and Competency based assessment (CBA). CBT and CBA is the training and assessment system chosen by ASEAN (Association of South-East Asian Nations) to train people to work in the tourism and hospitality industry throughout all the ASEAN member states.

What is the CBT and CBA system and why has it been adopted by ASEAN?

CBT is a way of training that concentrates on what a worker can do or is required to do at work. The aim is of the training is to enable trainees to perform tasks and duties at a standard expected by employers. CBT seeks to develop the skills, knowledge and attitudes (or recognise the ones the trainee already possesses) to achieve the required competency standard. ASEAN has adopted the CBT/CBA training system as it is able to produce the type of worker that industry is looking for and this therefore increases trainees chances of obtaining employment.

CBA involves collecting evidence and making a judgement of the extent to which a worker can perform his/her duties at the required competency standard. Where a trainee can already demonstrate a degree of competency, either due to prior training or work experience, a process of 'Recognition of Prior Learning' (RPL) is available to trainees to recognise this. Please speak to your trainer about RPL if you think this applies to you.

What is a competency standard?

Competency standards are descriptions of the skills and knowledge required to perform a task or activity at the level of a required standard.

242 competency standards for the tourism and hospitality industries throughout the ASEAN region have been developed to cover all the knowledge, skills and attitudes required to work in the following occupational areas:

- Housekeeping
- Food Production
- Food and Beverage Service
- Front Office

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- Travel Agencies
- Tour Operations.

All of these competency standards are available for you to look at. In fact you will find a summary of each one at the beginning of each Trainee Manual under the heading 'Unit Descriptor'. The unit descriptor describes the content of the unit you will be studying in the Trainee Manual and provides a table of contents which are divided up into 'Elements' and 'Performance Criteria". An element is a description of one aspect of what has to be achieved in the workplace. The 'Performance Criteria' below each element details the level of performance that needs to be demonstrated to be declared competent.

There are other components of the competency standard:

- *Unit Title:* statement about what is to be done in the workplace
- *Unit Number:* unique number identifying the particular competency
- *Nominal hours:* number of classroom or practical hours usually needed to complete the competency. We call them 'nominal' hours because they can vary e.g. sometimes it will take an individual less time to complete a unit of competency because he/she has prior knowledge or work experience in that area.

The final heading you will see before you start reading the Trainee Manual is the 'Assessment Matrix'. Competency based assessment requires trainees to be assessed in at least 2 – 3 different ways, one of which must be practical. This section outlines three ways assessment can be carried out and includes work projects, written questions and oral questions. The matrix is designed to show you which performance criteria will be assessed and how they will be assessed. Your trainer and/or assessor may also use other assessment methods including 'Observation Checklist' and 'Third Party Statement'. An observation checklist is a way of recording how you perform at work and a third party statement is a statement by a supervisor or employer about the degree of competence they believe you have achieved. This can be based on observing your workplace performance, inspecting your work or gaining feedback from fellow workers.

Your trainer and/or assessor may use other methods to assess you such as:

- Journals
- Oral presentations
- Role plays
- Log books
- Group projects
- Practical demonstrations.

Remember your trainer is there to help you succeed and become competent. Please feel free to ask him or her for more explanation of what you have just read and of what is expected from you and best wishes for your future studies and future career in tourism and hospitality.


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# Unit descriptor

**Source and package tourism products and services**

This unit deals with the skills and knowledge required to Source and package tourism products and services in a range of settings within the travel industries workplace context.

**Unit Code:**

D2.TCS.CL5.22
D2.TTA.CL2.18

**Nominal Hours:**

70

## Element 1: Describe the context for packages

**Performance Criteria**

1.1 Identify the clients for packages

1.2 Identify client requirements in relation to packages

1.3 Identify host enterprise requirements in relation to packages

1.4 Identify purposes of packages

1.5 Identify products and services for inclusion in packages

## Element 2: Source products and services for packages

**Performance Criteria**

2.1 Identify sources of information for products and services

2.2 Research information sources to obtain targeted information

2.3 Assess applicability of identified products and services to proposed packages

2.4 Select products and services for the package

## Element 3: Create packages of products and services

**Performance Criteria**

3.1 Identify pre-planning requirements for packages

3.2 Determine components of individual packages

3.3 Determine duration for packages

3.4 Calculate price points for packages

3.5 Develop terms and conditions for the packages

3.6 Prepare draft itinerary for packages

3.7 Prepare sales monitoring arrangements for packages

3.8 Plan marketing activities for packages

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# Assessment matrix

**Showing mapping of Performance Criteria against Work Projects, Written Questions and Oral Questions**

The Assessment Matrix indicates three of the most common assessment activities your Assessor may use to assess your understanding of the content of this manual and your performance - Work Projects, Written Questions and Oral Questions. It also indicates where you can find the subject content related to these assessment activities in the Trainee Manual (i.e. under which element or performance criteria). As explained in the Introduction, however, the assessors are free to choose which assessment activities are most suitable to best capture evidence of competency as they deem appropriate for individual students.

| | | Work Projects | Written Questions | Oral Questions |
|---|---|---|---|---|
| **Element 1: Describe the context for packages** | | | | |
| 1.1 | Identify the clients for packages | 1.1 | 1,2,3 | 1 |
| 1.2 | Identify client requirements in relation to packages | 1.2 | 4,5 | 2 |
| 1.3 | Identify host enterprise requirements in relation to packages | 1.3 | 6 | 3 |
| 1.4 | Identify purposes of packages | 1.4 | 7,8 | 4 |
| 1.5 | Identify products and services for inclusion in packages | 1.5 | 9,10 | 5 |
| **Element 2: Source products and services for packages** | | | | |
| 2.1 | Identify sources of information for products and services | 2.1 | 11,12 | 6 |
| 2.2 | Research information sources to obtain targeted information | 2.2 | 13,14,15 | 7 |
| 2.3 | Assess applicability of identified products and services to proposed packages | 2.3 | 16 | 8 |
| 2.4 | Select products and services for the package | 2.4 | 17,18 | 9 |
| **Element 3: Create packages of products and services** | | | | |
| 3.1 | Identify pre-planning requirements for packages | 3.1 | 19,20 | 10 |
| 3.2 | Determine components of individual packages | 3.2 | 21,22 | 11 |
| 3.3 | Determine duration for packages | 3.3 | 23,24 | 12 |

| | | Work Projects | Written Questions | Oral Questions |
|---|---|---|---|---|
| 3.4 | Calculate price points for packages | 3.4 | 25,26 | 13 |
| 3.5 | Develop terms and conditions for the packages | 3.5 | 27 | 14 |
| 3.6 | Prepare draft itinerary for packages | 3.6 | 28 | 15 |
| 3.7 | Prepare sales monitoring arrangements for packages | 3.7 | 29 | 16 |
| 3.8 | Plan marketing activities for packages | 3.8 | 30 | 17 |


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# Glossary

| Term | Explanation |
|---|---|
| **Auxiliary products and services** | Any product or service that supports the travel experience including travel insurance. currency and banking, visas, merchandise etc. |
| **Blog** | A website containing a writer's or group of writers' own experiences, observations, opinions, etc., and often having images and links to other websites. |
| **Client** | Customer or person responsible for arranging travel for another. |
| **CRS** | Computer Reservations system |
| **Customer** | Any person who is paying for a product or service provided |
| **Data** | Individual facts, statistics, or items of information |
| **ETA** | Estimated time of arrival |
| **ETD** | Estimated time of departure |
| **Feedback** | A reaction or response |
| **GDS** | Global Distribution System |
| **GPS** | Global Positioning System |
| **Inbound Tour Wholesaler** | Packages products to form a trip for an overseas market travelling to a specific country |
| **Information systems** | Software package that is used to collect data and translate it into useful information |
| **Itinerary** | A planned route or journey |
| **Objectives** | Something that one's efforts or actions are intended to attain or accomplish; purpose; goal; target |
| **Outbound Tour Wholesaler** | Negotiates product from International Suppliers for clients in a specific travelling to an international destination |
| **Mark-up** | Profit margin identified by difference between price quoted to customer and that quoted by suppliers |
| **Merchant Fee** | Fee charges by credit card company |

| Term | Explanation |
|---|---|
| **Net** | Financial amount after direct expenses or taxes have been deducted |
| **Preferences** | Experience your customer is seeking |
| **Product information inventory** | A database used for storing and administering all types of product information data |
| **Product** | Anything that can be offered to a market that might satisfy a want or need |
| **Quotation** | A document stating all requested information relating to a travel product and service including inclusions, costs and considerations |
| **Service** | Intangible offering that adds to the travel experience |
| **Statistics** | The study of the collection, analysis, interpretation, presentation, and organization of data |
| **Supplier** | Also known as operator. Any organisation that provides travel related products or services |
| **Tariffs** | Prices |
| **Testimonial** | Formal statement testifying the characteristics of an organisation |
| **Tour operator** | Organises sightseeing tours and accommodation in a particular destination or region |
| **Tourism board** | Coordinate the efforts of hotels, airlines and travel agents to develop the tourism industry of the country |


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# Element 1:
# Describe the context for packages

## 1.1 Identify the clients for packages

### Introduction

Tourism packages are an integral part of the travel and tourism industry.

The ever increasing rise in popularity in tourism packages demonstrates that it still is an attractive option for many clients in meeting their travel needs.

The range of package tours available has certainly become greater and more varied, with the notion that package tours only applying to cheap budget holidays not a true representation of the 'tourism package' industry.

Today, travel packages are aimed at:




- Different clients
- With different budgets
- Seeking different experiences
- For different durations
- In all corners of the world.

This manual will aim to explore the characteristics of packages, who uses them and how they can be constructed to meet the needs of the client.

### What is packaging?

Many tourism businesses package various tourism products and present them as a combined product to their client. This is called packaging. Any type of tourism component can be packaged with another. The component products and services may include items such as:

- Single or multiple products and services
- Accommodation
- Meals
- Transfers and transport, for example air, sea, rail, car hire
- Entrances to attractions for example wildlife parks, theme parks, national parks, museums
- Tourist guiding services & tours
- Tickets to entertainment, events or adventure activities
- Venue and equipment hire
- Meetings, events, functions and conferences.



## *Activity 1*

## *Personal reflection of travel packages*

You are required to think about any tours or packages that you, family or friends have taken.

Think about the different components of the tour.

Briefly describe the package, including advantages and disadvantages of using a package.

**Package components**

_____

_____

_____

**Advantages of packages**

_____

_____

_____

**Disadvantages of packages**

_____

_____

_____






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## Types of clients

It is important to understand the different types of clients that may be requiring tourism packages.

Clients can be anyone, from anywhere.

They can be of any age.



Clients may include:

- Domestic and international people
- Males and females
- People from different age groups
- Special interest groups
- Special needs clients
- Open groups, i.e. groups comprising an unpredictable mix of the general public
- Homogenous target market groups as defined by various demographic characteristics.

Packages are not just for group travellers or for those who are travelling for leisure. Many tourism businesses package together products and services for the independent traveller and for those travelling on business.

## Types of tour operators

Almost every tourism operator gets involved with combining individual components and selling them as a package:

- Day tour operators – might use their own coach, but book the services of a tour guide and book their clients into a restaurant for lunch
- Hotels – might package up rooms with breakfast and dinner and might also book transfers to and from the airport
- Outbound tour wholesalers – generally package flights with accommodation, transfers, meals and entrances to attractions
- Inbound tour operators – generally package local accommodation, meals, guiding services, tours and entrances to attractions
- Conference organisers – generally package the conference facilities, meals, audio visual equipment and staff and maybe a range of pre and post conference tours.



## Understanding characteristics of market segments

There are many ways to identify different segments of clients seeking tourism packages. The types of potential target markets are limitless. Each organisation breaks down the market to suit the needs and to help identify the potential of each group.

By identifying the different characteristics of the different market segments, we can start to identify the different needs they may have when seeking tourism packages.

In this section we will identify:

- Generic market segments
- Specific market segments.

## Generic market segments

Organisations may identify market segment categories such as:

### *Age*

Infants, children, teenagers, mature adults, senior citizens

### *Social background*

Ranges from the upper crust of society to people of more modest upbringing

### *Economic background*

High income earners through middle to low income earners

### *Cultural background*

Variety of religious beliefs and customs



### *Special interests*

Purpose for their holiday, sporting interest, athletes

### *Physical and mental abilities*

These people may have a physical or cognitive limitation

### *Dietary needs*

Any group within the community, including those with particular nutritional or dietary needs and interests


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## Specialised market segments

Following is a list of specific market segments that may be the focus of tourism packages.

### *Business*

Business travellers can comprise:

- FIT (Free Independent Travelers) who arrange their own accommodation
- Member of a corporation in which has a special rate with an organisation.
- Conference or event guest within a hotel.

### *Leisure*

This market is travelling for relaxation purposes and may include:

- FIT (Free Independent Travelers) who arrange their own accommodation
- Tours / coach groups
- Honeymooners
- Families
- Elderly.



### *Religious*

This market is travelling to participate in a pilgrimage or religious celebration

### *Sporting*

This market is travelling to participate in sporting events, tours or competitions

### *Outbound Tourists*

An outbound tourist is where a local tourist goes to a region away from where they reside and where the business is. This normally means the tourist is either leaving the town, city or country.

This type of tourist would be beneficial to travel agents and transport companies.

### *Inbound Tourists*

An inbound tourist is where a tourist from another location comes into your region. This normally means the tourist is coming into your area.

This type of tourist would be beneficial to accommodation venues and tourist attractions.



### *Domestic Tourists*

A tourist who travels within a country; they are natives and it's easy to promote to them.

### *International Tourists*

A tourist who travels to/from another country; conducting promotional activities can be harder as they may come from various counties, speak different languages and have different needs.

# 1.2 Identify client requirements in relation to packages

## Introduction

Once different types of clients and market segments have been identified, it is essential to understand what their needs may be, when seeking appropriate tourism packages.

Whilst there will be generic needs that all clients will have, each market segment will also have their own specialised needs that must be addressed.

By understanding the needs of your potential clients, it can help guide your research efforts, identify suitable package components and help tailor packages to individual clients.



Not only is it important to understanding of the needs of possible clients and market segments it is also important to understand the travel trends that are affecting the tourism industry. This can help identify the popularity and future direction of both the tourism industry and where the success of tourism packages may be found.

By understanding the range and types of needs that clients have, it helps to identify which products and services will be required to satisfy these needs.

To gain a more accurate idea of client needs and expectations, it is important to discuss ideas with colleagues who might be able to add suggestions. You must also ask your clients exactly what types of activities and services they need in order for you to choose appropriate tourism components to package.

The different methods that can be used to identify generic and specific client needs and requirements will be identified in this section.

## Understanding needs, wishes and expectations

Before we can tailor tourism packages to provide an offering that clients may want, we first need to find out what their actual needs may be.

Research of what the client wants is an essential activity. This is the essence of marketing.

The marketing perspective of a business says everything we do must be client-focused.



To identify exactly what this focus needs to be we have to obtain information on client needs and wants by undertaking some basic market research.

Client service revolves around us meeting or exceeding client needs, wishes and expectations. It seems appropriate, then, to identify what these mean.

### *Needs*

These underlie wishes and expectations and are the things clients are unable to do without.


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### *Wishes*

These refer to the way in which our client would prefer to satisfy a specific need, but they may not have the resources to meet these wishes. They may wish to stay in the luxury suite, dine at an internationally renowned fine dining restaurant and drink expensive wines, but they haven't got the money to pay for it so they settle for something else.

### *Expectations*

Clients have perceived expectations of what level of service they expect when visiting a venue arising from:

- The company's image or reputation in the market
- Advertisements and promotional messages
- Industry standards
- Comments from family, friends and colleagues
- Price charged for the offering.



## Generic client needs

Whilst every tourism client has their own individual needs, there are a number of generic needs that travel staff must address when designing tourism packages.

These needs include:

- Value for money
- 'Offering' reflecting what was advertised
- Expectations met / exceeded
- To receive friendly service
- To be safe
- To be dealt with in a prompt and courteous manner
- To receive assistance when necessary
- To be in comfortable, clean surroundings
- To feel remembered and recognised
- To be heard and understood.

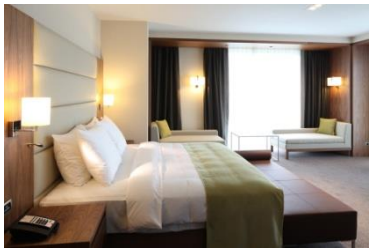


## Specific target market needs

As mentioned before, different clients from different target markets will have their own their own specific needs. It is important that staff recognise the needs of each target market and tailor proposed packages and inclusions accordingly.

Following are different target markets and their specific needs:

- Business – computer and internet access, newspapers, executive lounges, laundry services, business or executive centre, business and news channels. Business men are more likely to frequent a hotel bar and eat in the restaurant
- Women – hairdryers, larger mirrors, healthier food options, specific bathroom amenities, fashion magazines, bath. Business women are more likely to use the gym and order meals from room service
- Family – interconnecting rooms, entertainment options, child care facilities, children's television programs, package deals, and safety
- Leisure – good value rates, local attractions, concierge services
- Elderly – single beds, medical facilities, suitable food options and value for money rates



- Groups – need for large allocation of rooms, reduced room rates, meeting rooms, specialised menus, bus access and parking.

## Tour client needs

It is important to remember if you are selling tours to clients, that you also understand that clients will have needs that needs to be addressed. These include the needs for:

- Quiet time
- Free time
- Personal enjoyment of site
- Adequate rest time
- 'Up close and personal' opportunities
- Access to areas which are 'off limits' to other people or are not part of a tour



- Special photo opportunities with animals, characters or unique sights
- Preferential treatment.


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## *Activity 2*

## *Identify needs of different market segments*



**You are required to identify the possible needs of the different market segments coming to <u>your location</u>.**

You are to identify the strategy, products or services you feel could meet these needs.

| MARKET SEGMENT | STRATEGY, PRODUCT OR SERVICE TO MEET NEED |
|---|---|
| International clients - General | |
| Business - General | |
| Business - Men | |
| Business - Women | |
| Leisure - General | |

| MARKET SEGMENT | STRATEGY, PRODUCT OR SERVICE TO MEET NEED |
|---|---|
| Leisure - FIT (Free Independent Travellers) | |
| Leisure - Large Groups | |
| Leisure - Honeymooners | |
| Family clients - with children less than 4 years old | |
| Family clients - with children aged 4-16 | |
| Sporting groups | |
| Adventure seekers | |


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## Tourism trends

Not only is it important to identify the needs of individual clients, it is also important to understand what is popular in the travel and tourism industry itself.

It is a valuable exercise to conduct research to look at some of the trends in tourism that are contributing to a changing marketplace and impacting on travel tours and packages being offered in the market place. Many of them can be turned to your advantage if you can capitalise on them and have major implications for tour packaging.

### *Current tourism trends*

Current trends in tourism that may influence your packaging include:

- Leisure time
- Demographic factors
- Lifestyle
- Environmental tourism
- Sustainable tourism
- Changes in the way holidays are booked
- Growth in additional holidays and short breaks
- Destination choice
- Increased awareness of the needs of disabled people.



## Tourism statistics

### *Purpose of statistics*

Statistics is the study of the collection, analysis, interpretation, presentation, and organization of data.

Statistics are valuable tools for all businesses, regardless of industry, as they provide factual evidence that can be used to:

- Identify true performance or activity of organisations, staff and clients
- Identify trends and patterns of existing and potential clients
- Identify areas of good performance which can be exploited
- Identify opportunities for business improvement
- Guide future strategic direction of an organisation.



### *Industry statistics*

Each travel organisation should conduct some quantitative research to establish the trends in special interest and niche market tours. This research could include:



- Statistics produced by research organisations on visitor numbers and tourist origins
- Statistics available in reports from government on visitor number and tourist origins
- Statistics available in reports from industry on visitor numbers and tourist origins
- Internal figures - volume, sales and costs
- Industry trends reports
- International visitor statistics on arrivals, departures, visitor nights
- Visitor profiles including tourist origins, volume
- Industry and government research reports on industry trends, current development activity, forecasts of future developments.
- Types of tourism businesses
- Types and demographics of clients
- Top destinations
- Reasons for stays
- Current industry information
- Destination countries
- Departure months
- Length of stay
- Type of organisation for the trip
- Spending patterns of consumers
- Characteristics of consumers.



This information can be used to produce a report on the future demand for future general, special interest or niche market packages and tours.


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## Researching tourism trends and statistics

With this information you will be able to start researching for suitable products and services for packaging. Several methods should be used including:

### *Desk research*

- Get hold of recent reports on industry trends and surveys of tourist activities to find out about areas that show growth in demand
- Gather brochures and travel information on growth areas, services and activities that your clients or colleagues have identified, to find out more about available packages that supply these products
- Obtain timetables for major transport services used by clients.

### *Personal contact*

- Get in touch with government authorities and industry associations to find out about products or combinations that might be appropriate and to determine costing and pricing policies commonly applied to packages
- Contact possible product suppliers to find out about their facilities, services and prices
- Distribution agents, including travel agents, airlines, hotels and tour operators should also be contacted to find out the most effective marketing and promotion techniques to use




- Inspect possible sites or destinations to observe details and quality and make notes of the features of each.

## *Activity 3*

## *Identify tourism trends and niche packages*

You are required to identify tourism trends that are specific to your country.

This can be broken down for three key target markets:



- Inbound travel
- Outbound travel
- Domestic travel.

You are required to provide statistics to support your evidence.

Based on each of the trends for each of these key market segments, you are to identify possible niche packages you can implement to meet these travel needs.

You may be required to present your findings to the class, depending on time allocated.

**INBOUND TRAVEL**

| TRENDS | PACKAGE TO MEET NEED |
|---|---|
| | |
| | |
| | |
| | |


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**OUTBOUND TRAVEL**

| TRENDS | PACKAGE TO MEET NEED |
|---|---|
| | |
| | |
| | |
| | |

**DOMESTIC TRAVEL**

| TRENDS | PACKAGE TO MEET NEED |
|---|---|
| | |
| | |
| | |
| | |

## Seek client personal information

By collecting relevant information, travel agents can accurately source the most desirable products and services that can be included in a quotation, to reflect their travel needs.

The standard information contained within these documents is as follows:

- Name, initial and title
- Dates of birth for passengers, in particular children
- Contact details for home, work and mobiles
- Special meal requests or seating preferences
- Frequent flyer information and club memberships
- Details of travel such as dates, places and products
- Payment details
- Wholesaler or Consolidator used.



## Identify client travel details and requirements

Whilst each client will have different priorities, client requirements must focus on identified client needs, wants and preferences and will include:

- Name and contact details of the client including details of the traveller where the contact is not the user
- Proposed itinerary, including destinations (intermediary and final destinations), services and activities required, attractions to be visited
- Product and service preferences
- Practicality
- Service styles and standards
- Accommodation and dining/catering requirements
- Budget
- Dates and times, including specific days, seasonal imperatives and duration
- Timing and duration issues, including constraints and the need for integration with an associated tour or travel program



- Client numbers and classification, including adults, children, babies and groups
- Preferred travel options, including destination travel requirements
- Reasons for trip
- Non-negotiable elements
- Previous history of the client in relation to bookings made.
- Cultural and religious issues.


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## Understanding client needs, wants and expectations

Whilst most clients will have understanding of what they want from a travel experience, some clients will rely on your expertise in identifying suitable package options.

Staff must be pro-active and try to anticipate the needs of clients where possible.

Identifying needs, wants and expectations of clients are varied and are not the same for everyone. In fact, the needs for the same client may change on a daily basis. It is important staff remain aware of the satisfaction of clients and look for ways to improve the experience for all clients.

### *Quotation planners*



In reality, most client needs are quite simple and easy to identify. Through the use of quotation templates, travel staff can easily identify what their clients may be seeking when it comes to tourism package inclusions. The use of structured quotation templates will help to ensure that all necessary package requirements are addressed.

Each organisation will have established pro-formas or documents which must be used by staff when collecting information from clients in which quotations can be based around.

The use of scraps of paper and posits are not advisable, for obvious reasons. A standard enquiry form is recommended to ensure that the correct questions are asked and that vital information is not forgotten.

Here is an example of a form that will assist in the collection and recording of the information required to provide a quotation.

### *QUOTATION PLANNER - TEMPLATE*

**General Information**

| | |
|---|---|
| **Consultant** | |
| **Date** | |
| **Contact name** | |
| **Telephone** | |
| **Mobile** | |
| **Email** | |
| **Destination** | |

**Passenger/s**

| Surname | First Name | Title | DOB |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

### *General Questions*

How many people will be travelling?

_____

_____

_____

What type of holiday and/or destination do you have in mind?

_____

_____

_____

When do you want to travel?

_____

_____

_____

How long do you want to be away?

_____

_____

_____

Where did you go on your last holiday?

_____

_____

_____


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What standard of accommodation are you looking for?

How much are you considering spending?

Are you a member of any frequent flyer programmes?

Rooming/cabin type required?

Preferred departure/return points?

Do you have any special requirements?

Is your passport valid?

What is the country of origin of your passport?

### Flight preferences

| Dept Date | Origin | Destination | Airline | ETD/ETA | Costing |
|---|---|---|---|---|---|
| | | | | | |
| | | | | | |
| | | | | | |

### Land preferences

| Arr Date | Dept Date | Accommodation/Ship/Tour | Room Type | No. | Costing |
|---|---|---|---|---|---|
| | | | | | |
| | | | | | |
| | | | | | |

### Checklist

| | |
|---|---|
| **Travel insurance** | |
| **Passport details** | |
| **Visa** | |
| **Schedule of fees** | |
| **Merchant fees** | |
| **Foreign currency** | |
| **Other** | |

### Follow-up

| | |
|---|---|
| **Date quote provided** | |
| **1. Call back date/time** | |
| **2. Call back/date/time** | |


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### *Observation*

Quite often the body language of a client will indicate their true feelings. They could be looking around for staff to serve them, angry or frustrated, or simply disappointed in what has been provided.

### *Putting yourself in the shoes of the client*

Ask yourself ‘What would I like if I was in their position?’ If guests have arrived from a long flight and look tired, a speedy check in service is vital. You may also want to arrange room service dinner for them whilst they are checking in so they can eat quickly and go to bed sooner.




## *Identify tourism trends and niche packages*

## *Activity 4*

Using a quotation planner or other template of your choice you are to identify the travel package needs of a fellow class participant.

That person should identify their 'perfect holiday'.

# 1.3 Identify host enterprise requirements in relation to packages

## Introduction



Whilst the needs of the client are of primary concern when developing packages, it is essential that packages are researched and constructed in a manner that complies with your tourism organisation.

It is vital that you review your organisation's business plan, current activities and marketing objectives.

By reviewing this information, you can ensure that the tourism package and the inclusions that you intend to provide your client fits into the business strategy and overall style of your organisation.

As part of the packaging process you should assess features and benefits, costs, profit potential, accessibility and availability of potential products and destinations to not only meet your client's expectations but also fit your business objectives and style.

Whilst each organisation will aim to meet the needs of as wide a clientele base as possible, in reality they will focus on a niche market or clients with similar needs.

This is often done, not only to ensure your product knowledge is focused in one area, but also to establish your organisation as an expert in a certain market segment.

## Review host enterprise requirements

Besides the client, it is essential to consider your business when creating packages. Host enterprise requirements that need to be considered when creating a packaged tourism product include, but not limited to:

Host enterprise requirements may be related to:

- Business objectives
- Key market segments or clients
- Types and style of tourism activities and products current offered
- Types of products or services that could be combined with current activities and services
- How the packaging could be used to improve service
- Enhancing and expanding product range including product initiatives that conform to business plan and marketing objectives
- Movement into new target markets
- Reputation and image
- Business agreements, including franchise and other contractual arrangements
- Meeting competition
- Involvement of colleagues in determining requirements
- Potential increase in business and profitability.




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Reviewing these aspects of a tourism business is useful for setting the context for package product in development. Package products should be complementary to the existing business and marketing strategy of the organisation and the style of products that your organisation is known for.

The packages that you create must always meet the expectations of and improve the tourism experience for your clients. You may be reacting to a request to package a certain tourism experience and your clients may know the style of your organisation. They will, therefore, expect you to package a product that is in keeping with that style.




## *Activity 5*

## *Identify host enterprise requirements*

Based on the travel request identified in Activity 4, you are to:

- Identify host requirements you would need to consider when planning a travel package for the client
- Identify how you can meet these requirements.

| Types of host requirements | Methods to meet these requirements |
|---|---|
| | |
| | |
| | |
| | |
| | |

# 1.4 Identify purposes of packages

## Introduction

Tourism operators are regularly asked to quote on individual touring arrangements and are required to meet the special needs and requests of their client. In many instances, the client is asking for professional advice about destinations and the products within them. Often, the client has not visited the destination and relies on the tourism operators to source and package appropriate destinations and packages.

The main attraction of package tours for clients is the convenience of having the opportunity to participate in activities or visit locations without having to spend time organising the components.

Recently, the tourism industry has responded positively with ever expanding needs for new and variety of tour packages demanded by clients, in all corners of the world.




As the tourism industry continues to grow there will be an ever constant need for the development of new sophisticated tour packages and new tour operators specialised in the provisioning of these.

As mentioned in Section 1.1 of this manual, there are endless types of packages that can be created to meet the needs of a very wide group of potential clients.

This section will explore the different types of packages that may be offered by tourism organisations to potential clients.

## Types of tour packages

Tourism packages are products that contain a combination of tourism services, for example accommodation and transport, activities and transport, or any other combination.

The packages that most people are familiar with are holiday packages and tours. These products generally include transport by air, sea or land, accommodation at a resort or hotel and particular activities or attractions such as skiing or swimming.

Today, tour operators are offering variety of tour packages to cater the requirements of inbound, outbound and domestic tourism markets. The main packages include:

### *Independent Packages*



An independent tour is prepared to meet the needs of an individual client's specification. In this tour, a traveller is free and independent to select any component for his journey.

An independent holiday is where the clients travel at their own pace. There is no set itinerary, the decisions about where and when to go is left to the individual.

The travel agency or tour operator puts the individual tour components together by working directly with suppliers including, but not limited to airlines, hotels, cruise lines, transport operators and others. As will be shown in Section 2.1 of this manual, the list of tourism related suppliers is endless.


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The suppliers will quote a net figure to the travel agency. They in turn, will mark up the price, to cover time, expenses and profit margins. In independent tour, the travel agent will quote the rack rate for individual reservation.

Thus, an independent tour may be a package of air and non-air transportation and ground arrangements specifically tailored to the individual client's preferences and not advertised in a tour brochure.

Generally, this type of tours are known as 'Foreign Independent Tours' (FITs) and 'Domestic Independent Tours' (DITs) as per the location of the destination involved in the package.

### *Inclusive Packages*

In this type of tour, the tour components are purchased, combined and sold as a package at an inclusive price to clients by a tour operator is known as an inclusive tour. It is an advertised tour package which includes travel and ground arrangements at group rates.



This makes the inclusive tour less expensive than the independent tour. In fact, in this case, the tour operator has to guarantee that those seats, rooms, etc. will be sold in order to get the group rate.

In the event where spaces are not sold, the tour operator will absorb the total loss. Thus, an inclusive tour is a prepaid and well planned tour covering all components including services at special rates, requiring that all tour members must travel on the same flight round trip and must travel together during entire course of the tour.

Today, a variety of inclusive tours are offered by tour operators such as inclusive tour excursion and inclusive tour by charter, to name a couple of types.

There are many companies who offer modular packages with options that can be combined to make up a holiday. The options available include:

- Car hire
- Accommodation and accommodation passes
- Half day and full day city sightseeing tours
- Airport/hotel transfers
- Short duration coach tours (usually 3-7 days).

### *Escorted Packages*

This type of tour is also known as a 'Conducted Tour'. A tour escort is provided from the starting point back to the point of return to accompany the tour members. This type of tour is generally arranged by ground operators on behalf of main tour operator.



This tour normally involves a fully escorted coach tour with set departure dates and itinerary taking in all the major tourist destinations. All passengers travel together on the same coach and stay at the same hotels. Some meals may be included.

There is choice of budget-priced tours which use three-to-four-star hotels located in outlying suburbs or premium-range tours which offer four-to-five-star hotels in the best central locations.

Normally first time travellers prefer these tours whilst well-travelled people are quite confident in doing their own thing.



Some tours will have both a local escort and a professional escort sharing the responsibilities involved throughout the entire journey. In many cases tour operators use the services of a different escort/tour leader according to nature of each destination visited.

The principal duties of tour escorts are to receive tour members at the airport, assist them through custom clearance and other formalities and then perform the same duties at the time of their departure.

The tour escort is also responsible for providing other facilities during their stay at a particular destination. Due to step by step guiding and escorting, these tours are also referred as 'Hosted Tours'.

Professionally, escorted tours are normally planned and organised for the first-time travellers.

### *Business Packages*

The nature of business tour is significantly different in many ways from that of other tour packages. As identified in the name, the audience, purpose and focus of the tour will differ to that of recreational and holiday tours. That said, the pleasure element cannot be separated from the business tours.

Because business persons travel for a variety of reasons, destinations are not chosen by them but predetermined and more often attractions are added to make business tours more effective and attractive.

This is not only aimed at the core traveller, being the business person, but also aims to meeting the needs of their non-business travel companions.

Today, two forms of business tours have received a special attention from the tour operators. These are:



- Conference Package
- Special Events Package.

Business tours have become a very profitable venture for many tour operators, mainly for the fact that company budgets are generally greater than those of private travellers and that guaranteed numbers attending these tours are higher than for leisure tours.

Business packages include a wide range of activities such as venues for business meetings and conferences, accommodation, transportation, secretarial services, conference equipment's, local sightseeing and other facilities.


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### *Incentive Packages*

Incentive tours, one of the largest and growing segments in the tour package industry, are offered by a business organisation to its employees and their spouses as reward for some special endeavour or as a spur to achievement.



Tourism operators, such as Inbound Tour Operators regularly create one off special itineraries for incentive groups. These would be clients who may have 'won' their holiday from their employer because they have reached their sales target. These packages are almost always complex and include items such as formal promotional dinners, the use of the companies livery on coaches and business presentations.

These packages have been found to have greater motivating power than cash reward and other incentives given 10 the employees.

### *Special interest Packages*

Special interest tour is another form of tour package, which is also gaining weight in the tour operator industry.

Inbound Tour Operators and Outbound Tour Operators regularly design on-off itineraries. Special interest groups generally share a common interest and may want to book specialist products or services.



These tours are designed and arranged for those interested in eco-tourism, farm tourism, ethnic studies, safaris, skiing, beaches, adventures, deserts, cultural events, and pilgrimage etc.

## Purpose of tour packages

The purpose of packages may be focused towards one or more of the following:

- Specific age holidays, packages and tours
- General interest
- Conferences
- Social events
- Holidays and recreation
- Tour programs
- Incentives
- Series tours
- Eco-tours
- Education
- Experience
- Fitness
- Excitement / action experiences
- Celebration of an event / historical date



- Money raising
- Language
- Music
- Sports
- The environment
- Culture
- Arts
- Animals
- Food
- History
- Flora and fauna
- Natural attractions
- Shopping
- Four wheel driving
- Camping
- Cruises
- Luxury
- Budget
- Snow skiing
- Diving
- Rail
- Coach
- Safaris
- Family
- Overland treks/walking
- Beach
- Wedding ceremonies.



## Location of tour packages

Whilst tours can be conducted anywhere in the world, they are normally categorised as being held:

- On-site - at a park, garden, tourist attraction or natural site
- 'Elsewhere' - such as tours of the city, tours of an area, or tours of a business or property in a remote location.

As you can see the types and purposes of packages that can be developed are quite varied.

The main aim of most packages is to provide clients with a mix of products and services to deliver a desirable experience.


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## *Activity 6*

## *Identify different types of packages*

You are required to conduct internet research and provide an example for only one of the following types of tour packages that are conducted, anywhere in the world (excluding your own country):

- Independent Packages
- Inclusive Packages
- Escorted Packages
- Business Packages
- Incentive Packages
- Special interest Packages
- A package for any of the purposes as stated on Page 35.



Provide details of your findings below:

| | |
|---|---|
| **TYPE OF PACKAGE** | |
| **LOCATION/S** | |
| **DURATION** | |
| **COMPONENTS / INCLUSIONS** | |
| **COST** | |

### *Creating the tour package for the local market*

How can this type of package be promoted?

- To a local market
- To be conducted in your own country.






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# 1.5 Identify purposes of packages

## Introduction

Identifying, sourcing and selecting product and services for inclusion in a package is reliant on finding a balance of meeting your client needs with understanding of what is possible.

It is also based on identifying:



- Availability of appropriate products and services to suit the stated or established client needs
- Suitable suppliers or wholesalers that can provide these products
- Prices that meet the passengers' budget.

## Importance of collecting information on products and services for packages

Information is a key component of sales and marketing in tourism. Effective information is also a key requirement for the preparation of suitable tourism packages for clients. Finding information and using it effectively to meet the needs of your clients is a key element of working in many tourism industry positions.

This includes finding the answers to questions such as:



- What is it?
- Where is it?
- How do you get it?
- How long does it take?
- What is included?
- What is excluded?
- What is it like?
- How much does it cost?
- What would you recommend?

To assist clients and ensure their specific needs are met it is imperative to have an understanding of the products and services that can be incorporated into a package.

One of the most important aspects of any job in the tourism industry is finding information about possible products and services. Whilst it is impossible to know everything about the thousands of different tourism products and services available, it is important that when asked by the client, careful research is undertaken.

The focus of researching products and services will be identified in more detail in Section 2.2

In some jobs you need a broad range of information about multiple destinations and in others you need an in-depth knowledge of one destination.

The underpinning key to information provision is knowing where and how to find the information you need and applying that information effectively to the specific needs of your client.

## General products and services sought by clients

As discussed before, whilst there are many types of clients, seeking many types of packages there are a number of generic travel products and services that will be sought by clients.

Products and services can be divided into the main areas of air, land, sea and auxiliary.

- Air – air travel and associated taxes
- Land – anything that is not air travel or a cruise
- Sea – cruises, ferries etc.
- Auxiliary – any product or service that supports the travel experience.

The area generally termed 'land arrangements' covers an array of products and services which fall into the following main areas:

- Accommodation
- Transfers
- Transportation – rail, ferry, car and van hire
- Tours
- Attractions, activities and entertainment.




Auxiliary products and services encompass:

- Travel Insurance
- Currency and banking
- Visas
- Merchandise
- Airport parking.

In section 2.1 of this manual, the different types of tourism businesses and information relating to different products and services will be discussed in more detail.


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## Activity 7

## *Identify popular travel packages in your country*



You are required to identify popular travel packages that are popular in your country at the moment.

This may require you to conduct some research, through the internet and specific travel agent websites, to identify what is currently being offered.

| | |
|---|---|
| **TYPE OF PACKAGE** | |
| **LOCATION/S** | |
| **DURATION** | |
| **COMPONENTS / INCLUSIONS** | |
| **COST** | |
| **TARGET MARKETS** | |
| **BENEFITS OF THE PACKAGE** | |
| **BENEFITS FOR THE TRAVEL COMPANY** | |
| **REASONS WHY YOU BELEIVE THE PACKAGE IS POPULAR** | |

## Work Projects

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

1.1 Please complete the following activities relating to this Performance Criteria:

- Activity 1

1.2 Please complete the following activities relating to this Performance Criteria:

- Activities 2,3,4

1.3 Please complete the following activities relating to this Performance Criteria:

- Activity 5

1.4 Please complete the following activities relating to this Performance Criteria:

- Activity 6

1.5 Please complete the following activities relating to this Performance Criteria:

- Activity 7


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# Summary

## Describe the context for packages

**Identify the clients for packages**

- What is packaging?
- Types of clients
- Types of tour operators
- Understanding characteristics of market segments
- Generic market segments
- Specialised market segments.

**Identify client requirements in relation to packages**

- Understanding needs, wishes and expectations
- Generic client needs
- Specific target market needs
- Tour client needs
- Tourism trends
- Tourism statistics
- Researching tourism trends and statistics
- Seek client personal information
- Identify client travel details and requirements
- Understanding client needs, wants and expectations.

**Identify host enterprise requirements in relation to packages**

- Review host enterprise requirements.

**Identify purposes of packages**

- Types of tour packages
- Purpose of tour packages
- Location of tour packages.

**Identify products and services for inclusion in packages**

- Importance of collecting information on products and services for packages
- General products and services sought by clients.

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# Element 2:
# Source products and services for packages

## 2.1 Identify sources of information for products and services

### Introduction



There are endless sources of product information that can be collected, analysed and used by a travel and tourism organisation for the benefit of the organisation itself or to assist clients with potential travel plans.

This section will explore:

- Types of tourism industry organisations
- Identify types of product and services information
- Sources of product and services information.

### Tourism industry organisations

When compiling product information for your 'product knowledge' data bases, it is essential to identify the different types of businesses in which your potential clients may use.



Whilst gathering information from all tourism operators is impossible and impractical, identifying commonly used tourism providers enables you to gather information relating to the products and services they provide.

In addition it enables you to ensure that the information that you have gathered is accurate and up to date.

Depending on the types of tourism offerings provided by your organisation possible businesses in which you may seek product information from includes, but not limited to:

- Airlines
- Other travel suppliers
- Suppliers
- Accommodation
- Attractions and theme parks
- Tour operators
- Inbound Tour Wholesaler
- Outbound Tour Wholesale
- Retail Travel Agents



- Local, regional and National information services
- Meetings and Events
- Corporate Agents
- Ministries of Tourism
- Tourism boards
- Industry authorities
- Industry associations.

The breakdown of businesses identified in the categories above will be identified in more detail in this section.

## Airlines




Airlines own the planes and sell seats to all sectors in the travel industry. They do this via a Computer Reservations system (CRS) such as Galileo, Sabre and Amadeus.

They also sell seats via the Internet and via the phone to the public. Airlines negotiate rates with Retail Agents, Wholesalers, and Corporate Agents who then take a commission from the airline sale. Some Airlines have a Wholesale division which sells directly to Retail agents.

## Other travel suppliers

These include but are not limited to:

- Cruise operators
- Railway operators
- Bus lines
- Car rental businesses
- Limousine hire
- Taxis.



## Suppliers and providers of support and ancillary services

This includes:

- Travel insurance providers
- Finance providers
- Currency exchange
- Conference and similar venues
- Interpreters.





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## Accommodation

This sector includes but not limited to:



- Hotels and motels
- Guest houses
- Bed and breakfasts
- Caravan parks and camping grounds
- Resorts
- Time share properties
- Apartments, villas and cottages
- Conference and exhibition centres.

## Attractions and Theme Parks



This sector includes but not limited to:

- Museums and galleries
- National parks, wildlife parks and gardens
- Theme parks
- Heritage sites and centres
- Sport and activity centres
- Aquarium and zoos.

## Tour Operators

A tour operator typically organises sightseeing tours and accommodation in a particular destination or region. They act as a middle person between the Wholesaler and the Principal or Supplier of the product

Examples of businesses include Trafalgar Tours and Contiki.

Visit:



- www.trafalgartours.com
- www.contiki.com.

## Inbound Tour Wholesaler

An Inbound Tour Wholesaler packages products to form a trip for an overseas market travelling to a specific country.

## Outbound Tour Wholesaler

An Outbound Tour Wholesaler negotiates product from International Suppliers for clients in a specific travelling to an international destination. They approach airlines, hotel, local tour operators, cruise companies, car rental companies and rail companies to obtain wholesale rates which are then on-sold to the public via the Retail Travel Agents

Examples of businesses include Tempo Holidays, Peregrine Adventures and Creative.



Visit:

- www.tempoholidays.com
- www.peregrineadventures.com
- www.creativeholidays.com.

## Retail Travel Agents

A Retail Travel agent is the go-between between the client and the Wholesaler. It is the Retail agent who obtains all the relevant details from a client to enable them to make a booking through a Wholesaler. All this information is then finalised and paid for to the Wholesaler. Both the Retail agent and the Wholesaler make commission from the booking.



Examples of these businesses include: Flight Centre, STA and American Express visit:

- www.harveyworld.com
- www.flightcentre.com
- www.statravel.com.

## Local, regional and national information services

These information services exist to assist the public and Travel agents in obtaining information on a particular region from the experts. This can be at a local, regional or national level.

These bureaus can be independent bodies or come under the support and direction of the respective Ministries of Tourism, which will be identified later.

These bureaus take calls from Travel agents as well as the public to help in promoting their region. They have wholesale divisions and all staff are experts in their area.



All these locally based Tourist bureaus have a fantastic website with a wealth of information and products to extend one's knowledge.

At a regional level there may be Information Centres, which provides a local booking service for accommodation in the area. They also provide pamphlets on local attractions which inform visitors of points of interest in the area.


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## Meetings and Events

This sector has been one of the fastest growing within the tourism and hospitality industry.

These companies organise meetings, conferences and major events by booking flights, accommodation, tours and the meeting facilities for their Client and their guests.



Large Corporate Companies have a separate department set up specifically to cater for the conference and event market. An example of this type of Company is HRG (Hogg Robinson Group) which is a UK based company specialising in corporate travel and having a division specifically setup for conference and event bookings. There are also independent companies that only specialise in Meetings and Events, such as The Event Factory and C1 Events.

## Ministries of Tourism

Each country within the ASEAN region will have dedicated government ministry specifically focused on the tourism industry. Their role is to regulate and manage the industry.

A Ministry of Tourism is normally responsible for the formulation of national policies and programmes and for the co-ordination of activities of various governments and the private Sector for the development and promotion of tourism in the country.

The Ministry may co-ordinate special initiatives including:

- Selecting and managing heritage sites
- Dedication and allocation of government funding to tourism initiatives
- Providing information on news laws and regulations
- Establishing service excellence awards
- Publishing and managing tenders for tourism projects.

The ASEAN region, whilst working collectively to achieve a primary purpose of attracting tourism to the region as a whole, each participating government will also have their own websites and departments in which to collect information. They have been identified below.

**BRUNEI**
Tourism Development Division
Ministry of Industry and Primary Resources
Jln. Menteri Besar, Bandar Seri Begawan, Brunei Darussalam
Tel. (673-2) 382822 Fax. (673-2) 382824
Email: info@bruneitourism.travel
Website: http://www.bruneitourism.travel/

**CAMBODIA**
Ministry of Tourism
3, Preah Monivong Blvd, Phnom Penh, Cambodia
Tel. (855-23) 213911 Fax. (855-23) 426107/217503
Email: dgpro@camnet.com.kh
Website: http://www.tourismcambodia.com/



**INDONESIA**
Ministry of Culture and Tourism
Jl. Medan Merdeka Barat 17, Jakarta 10110, Indonesia
Tel. (62-21)3838157 Fax. (62-21) 3849715
Website:
http://www.budpar.go.id
http://www.my-indonesia.info

**LAOS**
National Tourism Authority of Lao P.D.R.
Lane Xang Avenue, P.O. Box 3556, Vientiane, Lao P.D.R.
Tel. (856-21) 212248 Fax. (856-21) 212769/2127910
Website: http://www.tourismlaos.gov.la/



**MALAYSIA**
Ministry of Tourism
Menara Dato' Onn
Putra World Trade Center, 50480, Kuala Lumpur,
Malaysia
Tel. (603) 2693 5188 Fax. (603) 269 0207/2693 0884
Email: tourism@tourism.gov.my
Website: http://www.tourism.gov.my

**MYANMAR**
Ministry of Hotels and Tourism
Building No. (33), Nay Pyi Taw, Union of Myanmar
Tel. 95 67 406129, 406130
Email: mo.moht@mptmail.net.mm / mohtmail@gmail.com
Website: http://www.myanmartourism.org/

**PHILIPPINES**
Department of Tourism
DOT Building, T.M. Kalaw Street, Agrifina Circle, Rizal Park
Manila 10004, Philippines
Tel. (632) 523 8411 Fax. (632) 521 7374
Email: deptour@info.com.ph
Website: http://www.wowphilippines.com.ph/



**SINGAPORE**
Singapore Tourism Board
Tourism Court, 1 Orchard Spring Lane, Singapore 247729
Tel. (65) 736 6622 Fax. (65) 736 9423
Email: stb_sog@stb.gov.sg
Website: http://www.yoursingapore.com/

**THAILAND**
Tourism Authority of Thailand
1600 New Phetchaburi Road
Makkasan, Ratchathewi, Bangkok 10400, Thailand
Tel. (662) 250 5500 Fax. (662) 253 7437
Email: center@tat.or.th
Website: http://www.tourismthailand.org



**VIET NAM**
Viet Nam National administration of Tourism
80 Quan Su Street, Hanoi, Viet Nam
Tel. (84-4) 822 8744 Fax. (84-4) 942 4115
Email: binhvnat@hn.vnn.vn
Website: http://www.vietnamtourism.com

## Tourism Boards

In some countries such as in Singapore, a ‘tourism board’ have been established. It is called the Singapore Tourism Board. The primary task of STB was to coordinate the efforts of hotels, airlines and travel agents to develop the fledging tourism industry of the country.



Later, STB began to initiate new marketing ideas to promote Singapore's image aboard. The board created the Merlion, a symbol based on a Singapore mythical legend that became an icon of the Singapore destination. The board also has been providing travel agent licensing and tourist guide training.

STB actively promotes the development of infrastructure, including the building of hotels and tourist attractions such as the Jurong Bird Park and Sentosa which now becomes a popular resort island for both tourists and local visitors. The board also market the city as a convention venue and organised events to attract visitors.

## Industry Authorities

Authorities are established, either by a government or working closely with government to provide services relating to the tourism industry.

One such example is the 'Tourism Authority of Thailand – http://www.tourismthailand.org/about-thailand/.

It is the official travel information website for tourists visiting Thailand and contains all information to ensure visitors have all the necessary information to help them plan and enjoy their travel experience.

## Industry Associations

Industry associations are bodies that all businesses can elect to join that serve specific and over-arching industry sectors. These bodies provide businesses with a variety of services which can include:



- Representing the industry – this means they act as an industry spokesperson to unions, the media and government
- Legal advice – about industrial relations issues, OH&S
- Training – to management and operational staff
- Industry standards and benchmarks – which member bodies can elect to implement as their standard practice
- Cost savings – by virtue of establishing for their members a range of discount rates for products and services from industry suppliers.

Many have newsletters, magazines or regular mailings of some sort to keep the membership up-to-date with what's happening. Ask you supervisor if your workplace is a member of such a body and ask if you can read the newsletters etc.

Industry associations include:

- Australian Federation of Travel Agents – www.afta.com.au
- International Air Transport Association – www.iata.corg
- Pacific Asia Travel Association – www.pata.org.


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## *Activity 8*

## *Identify tourism businesses*



For each type of tourism business listed below, provide examples of actual organisations in which you would request information from.

| **Type of tourism businesses** | **Names of organisations** |
|---|---|
| **Airlines** | |
| **Other travel suppliers** | |
| Cruise operators | |
| Railway operators | |
| Bus lines | |
| Car rental businesses | |
| Limousine hire / taxis | |

| Type of tourism businesses | Names of organisations |
|---|---|
| Travel insurance providers | |
| Finance providers | |
| Currency exchange | |
| Conference and similar venues | |
| Interpreters | |
| **Accommodation** | |
| Hotels and motels | |
| Guest houses | |
| Bed and breakfasts | |


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| Type of tourism businesses | Names of organisations |
|---|---|
| Caravan parks and camping grounds | |
| Resorts | |
| Time share properties | |
| Apartments, villas and cottages | |
| Conference and exhibition centres | |
| **Attractions and theme parks** | |
| Museums and galleries | |
| National parks, wildlife parks and gardens | |
| Theme parks | |
| Heritage sites and centres | |

| Type of tourism businesses | Names of organisations |
|---|---|
| Sport and activity centres | |
| Aquarium and zoos | |
| Tour operators | |
| **Inbound Tour Wholesaler** | |
| **Outbound Tour Wholesale** | |
| **Retail Travel Agents** | |
| **Local, regional and National information services** | |
| **Meetings and Events** | |
| **Corporate Agents** | |


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| Type of tourism businesses | Names of organisations |
|---|---|
| **Ministries of Tourism** | |
| **Tourism boards** | |
| **Industry authorities** | |
| **Industry associations** | |





## Identify types of product and services information



As can be seen above, there are many types of tourism related businesses. The information provided by each will be valuable and essential in providing information and advice to your clients.

Following, are types of tourism related information that should be gathered as it will be required to provide accurate advice to clients.

## Destination information

In order for you to be able to provide your clients with advice about destinations, you need to have good background knowledge of sought after tourism destinations. This can include those in your country, region or worldwide.

Destination information may include:

- General destination information
- Statistical information
- Currency
- Maps
- Travel guides
- Events
- Languages
- Safety
- Government information
- Time zones
- Communications.



## Local community information

Staff should have a thorough understanding of:

- Local attractions
- Shopping and retail areas
- Events and festivals
- Eateries
- Supermarkets
- Local transport
- Activities
- Places of worship.




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## International destination information

When providing information on international destinations to your clients, you will need to advise them of the government regulations that apply when people wish to leave the country.



In addition to passport and visa information, you will need to inform your clients of the health and safety precautions of each particular destination and any customs regulations that apply.

A visa is a stamp or document placed in passports by an authorised representative of a country, permitting passage to a country and allowing the visitor to remain there for a limited amount of time.

## Tours

You should be aware of the types of tours on offer in a destination.

Different clients will be interested in different types of tours, so it is important that you have a good selection for them to choose from, for example:

- Multi-day bus tours with a guide
- Walking tours
- Special interest tours
- Cycling tours
- Drive yourself tours
- Low budget tours.



### *Tour information*

- Company name, name of tour and duration
- Departure date, time and location address
- End date, time and location address
- Type of accommodation e.g. single, twin-share
- Tour company specific baggage labels
- Hotel list – names, address and telephone numbers for hotels used on tour
- Tour information booklet
- Included services – arrival and departure transfers.

## Attractions

Probably the most important single feature is that a destination must have an attraction.

Attractions can range from a notable historic site, to a scenic location, or a place where some special event is taking place.



Attractions have value in themselves, but they are also evaluated by the traveller from several viewpoints. One aspect of importance is the positive 'distance-pull' of an attraction. In simple terms, this means that an attraction must have enough appeal to make it worthwhile for the traveller to make the journey.

Each attraction has a different 'distance-pull' and each individual traveller has his or her own set of values that influences how they evaluate the distance-pull of the attractions.

Every country can claim to have some attractions that might be of interest to a client.

It is important to remember that tourist attractions can be:

- Natural
- Man-made.

## Activities

Attractions are the main reason for choosing a specific destination. However, it is necessary at most destinations to provide for some activities to supplement the major attractions.



These activities are established so the tourist will have 'something to do when there is nothing to do'! Activities give the tourist something to do when the weather is inclement and after dark.

Going on a nature walk, attending a minor sporting fixture, playing golf or tennis are examples of activities tourists participate in while at their destination. Activities are there for casual enjoyment.

## History

Many people are interested in history, and therefore information on the history of a destination can be important to clients. History adds colour and life to a destination.

Knowing what has happened in the past will give an insight into the destination as it is today.


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## Geographical features

Geographical features include:

- Mountain ranges
- Lakes
- Rivers
- Caves
- Waterfalls
- Rock formations
- Beaches
- National parks.



Your clients may want information on the geography of a destination because it contributes to the reason why they want to travel to this destination.

## Local customs and culture



Every destination will have customs that are specific to that place and that particular culture. These will most likely be of interest to your clients.

Each destination is unique and may have language and customs which are quite different from your own.

Although this may be the major reason for the country's attraction, it is also important that these differences are respected.

## Climate



It is important that you understand the weather conditions and patterns of the destination.

Your client will need to know what the weather is like so that they know what they need to take with them and whether they will cope in these climatic conditions.

## Accommodation

As previously mentioned there are a wide range of accommodation options, ranging from five-star hotels to budget accommodation.

Information that needs to be sought in relation to accommodation includes, but is not limited to:

- Room types
- Tariffs
- Products and services
- Room facilities
- Location and distance to attractions
- Packages
- Blocked dates
- Seasons and times
- Minimum purchase
- Booking and stay requirements
- Property name and address
- Room type and category
- Number of nights
- Check-in and check-out dates
- Check-in and check-out times
- Day use or late check-out if applicable
- Inclusions e.g. full buffet breakfast, arrival drinks, fruit basket
- Extra charges payable direct e.g. rollaway bed
- Special requests e.g. cot, double bed
- Special promotions e.g. hotel meal credit per room per stay.



## Amenities and services

Amenities and services refer to the provision of basic services for travellers including:

- Toilet blocks
- Water
- Electricity
- Food and beverage including restaurants, cafes, bistros
- Medical services
- Banks and post offices
- General safety facilities including fire, police emergency services
- Entertainment




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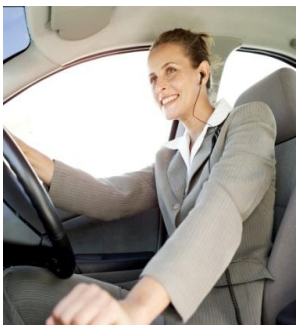
- Sporting
- Shopping.

## Airlines




- Airline or combination of airlines
- Airport codes
- Airline codes
- City codes
- Flight numbers
- Schedules / timetables
- Destinations
- Routing
- Origin and destination
- Code share flights
- Normal fares
- Discounted fares, including infants, children, students, pensioners and groups
- Fares for unaccompanied children
- Promotional fares and packages
- Taxes
- General air travel rules and restrictions of the host country, including regional requirements, where applicable
- Class of travel
- Stopovers
- Mileage restrictions allowed
- Minimum and maximum stays
- Ticketing time limit
- Payment conditions.

## Car hire



- Company, category, type
- Pick-up and drop-off depots, the depot addresses and opening/closing times
- Pick-up and drop-off dates and times
- Inclusions and exclusions e.g. unlimited kilometres, insurance and taxes
- Special requests e.g. baby seat, ski rack, GPS
- Notes e.g. a valid international driver's license is required.

## Cruises



- Name of the ship and voyage number
- Embarkation date, time and port address
- Disembarkation date, time and port address
- Grade/category and cabin type and number
- Passenger dining preference
- Pre-booked special requirements e.g. gluten free diet, wheelchair.

## Transfers

- Name of company providing the transfer
- Local address and local telephone contact number of company providing the transfer
- Type of transfer e.g. private car, seat in coach, airport shuttle
- Pick-up date, time and location including address or terminal number
- Drop-off date, location e.g. Park Royal Hotel, Singapore
- Special instructions in relation to transfer.

## Rail



- Name of Pass
- Duration and type of pass e.g. 3 Day Adult or 4 Day Flexi
- Validity dates.


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## Sources of travel product and services information

Whilst the sources of information that can help identify possible tourism products and services that will be helpful in preparing quotations for clients is limitless, possible sources of information are identified below.

| Information sources | What sort of information can you find here? |
|---|---|
| Brochures/DVDs | Destinations and product information, packages, prices, booking conditions.<br>Many brochures also provide information on local customs, health precautions, visa requirements, currency, shopping, hints on what to wear. |
| Hotel and accommodation guides and indexes | Information and contacts on accommodation. |
| Atlases, maps and encyclopaedias | Geographical and general destinations information. |
| Travel guides | Destination and product information.<br>(e.g. Lonely Planet, Fodor's, Insight, internet) |
| Individual timetables | Product and scheduling information, general industry information. |
| Automated information systems | Varied information |
| Computerised Reservations Systems (CRS) | Almost anything relating to airlines-flight schedules, fares, seating plans, just to name a few. In addition, most CRSs can provide you with a massive amount of other information – location times, daily exchange rates, visa information, destination information.<br>They also provide a link into the reservations systems of many wholesalers. |
| International airline guides | Comprehensive worldwide air schedules, minimum connecting times, check in requirements, baggage information, airline and city codes, international time calculators, local taxes etc.<br>The main example is the Official Airline Guide (OAG), although its use has been superseded to a great extent by the CRS. |
| Travel Trade Yearbook | Contacts for hundreds of companies in different sectors of the travel industry. |

| Information sources | What sort of information can you find here? |
|---|---|
| Travel Information Manual (TIM)/ Travel Trade Visa Guide/ Travel Express Visa Guide | Visa and other statutory requirements for overseas countries. TIM can now also be accessed on the CRS. |
| Passenger air tariff | Airfare information |
| Trade press | Industry updates, destination and product information, general news.<br>(e.g. Travel Trade, Travel Weekly etc.) |
| General print and electronic media, travel magazines and even news bulletins for current issues | General destination and product information. News services can supply very current information on the day to day developments such as flood, social unrest, exchange rates and so forth. |
| Educationals/product familiarisations | Opportunities to experience products and services first hand. |
| Other organisations in the industry | To get information and advice from an organisation who specialise in a particular product or destination. |
| The internet, travel websites, travel advisor, blogs | A major resource of all types of information destinations, airline, current affairs, hotels, just to name a few. The internet is fast becoming an increasing popular means of booking travel arrangements. |
| Travel companies product launches, travel shows and information nights | A major way to gain knowledge on specific products with specific travel companies, update you on new product information on the market and to keep in touch with people in the travel industry. |
| Government agencies such as national parks and wildlife services or government tourism offices | General destination and product information |


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### *Additional sources of information*

Whilst the above sources are most commonly used, other sources that can be accessed include, but are not limited to:



- Intranet Websites
- Internal information databases
- Product manuals
- Supplier information and sales kits and their sales representatives
- Destination and product experts in wholesale reservation call centres
- Confidential and general industry tariffs
- Preferred contracts or agreements
- Official country tourist offices, authorities and bureaus
- Your own travel experience
- Colleagues.

# 2.2 Research information sources to obtain targeted information

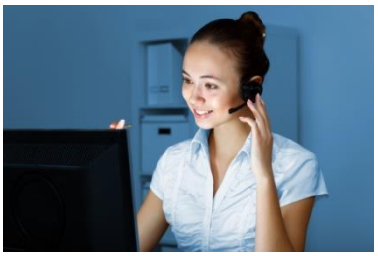
## Introduction

Now that you have identified different tourism businesses that provide tourism products and services that can be included in tourism packages, it is now time to start the research process.

The aim of the research process is to collect accurate and relevant information to meet the needs of the client and any requests they have made.

This section will explore the different ways in which information may be gathered.

It will focus on:



- The need to identify the research points
- Collecting primary and secondary data
- Recollection of personal observations
- Accessing internal sources of information
- Gathering feedback from customers
- Accessing external sources of information
- Establishing industry networks.

Each of these different channels of information have their own benefits and is vital in building a solid base of information, that whilst can meet the needs of current individual requests for tourism packages, can certainly be used in future enquiries.

## Defining the research points

The first step is to try to identify exactly where the focus of research and information collection should be concentrated on.



As seen earlier in this manual, there are a number of ways in which client needs can be identified. Naturally the use of a quotation planner is the most advantageous tool in identifying all the needs clients may have.

By identifying the research points, the process of undertaking research will be able to be performed in a methodical and efficient manner.


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## Collect primary and secondary data

When collecting information for inclusion in tourism packages, in essence you are collecting data.

Data is a piece of information that can be collected and interpreted by an organisation for their use.

Data that is specifically aimed to help an organisation is the most desirable; it is not always possible for an organisation to collect its own information.



So what types of data can be collected and used by a tourism organisation?

The two most common sources of data are:

- Primary data – collected for a specific purpose
- Secondary data – generic information.

### *Primary data*

Primary research data is newly generated information that you yourself or the organisation create, as opposed to the existing secondary data. The need for primary research data commonly arises because of gaps in the information available through the secondary research data.

The most common forms of primary market research for tourism businesses include:



- Customer surveys
- In-house questionnaires and feedback sheets
- Focus groups
- Electronic responses on the website
- Observation.

Primary data is considered to be either *qualitative* or *quantitative* research.

**Qualitative research**

Qualitative research does not look at numbers but tries to find out the reasoning behind certain actions, procedures, activities or ways of thought.

This is especially important when identifying reasons why certain tourism products and services are chosen or popular with other clients.

Whilst traditional qualitative research was aimed around getting ideas and thoughts people, either through specific focus groups or one-to-one interview, this data collection method can help provide hospitality and tourism managers with reasons to endless questions including:

- What customers want or expect
- Why the venue would suit the client
- What benefits are derived from tourism products and services
- What previous clients liked about a venue.

**Quantitative research**

Quantitative research is market research, based on structured, closed-ended questionnaires, which aims to gather responses that can be summarised in numbers.

When researchers use identical questions and response alternatives, they can summarise the information quantitatively or numerically by percentages, frequencies and averages. This allows for simple coding of results and computer analysis of results.

Samples can be larger and more representative and statistical techniques can be used to draw conclusions.

The main types of quantitative research are:

- Mail survey
- Telephone survey
- Face-to-face interview
- Combination of mail/telephone surveys as customers dial their responses via telephone
- Observation (detects via videotape actual behaviour of respondents).



## *Secondary data*

Secondary data is information that already exists. It just needs to be found. A business can generate secondary research data from its sales figures, statistics, databases and from other peak bodies who have already undertaken primary research and published the results of that research

Secondary data sources should be exhausted before primary research is undertaken. It must be relevant, accurate and sufficient. It is less expensive than primary research, easily accessible and immediately available.

**Types of secondary data**

Whilst the list of secondary data is endless, it may include:

- Domestic and international visitor statistics on departures, expenditure, visitor nights
- Visitor profiles including tourist origins, volume, purpose of trip, seasonality, accommodation, transport and expenditure
- Industry and government research reports on industry trends, current development activity and forecasts of future developments
- Client feedback
- Feasibility studies for new developments or products
- Responses to surveys, questionnaires on preferences, needs and current tourist activities.


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**Sources of secondary data**

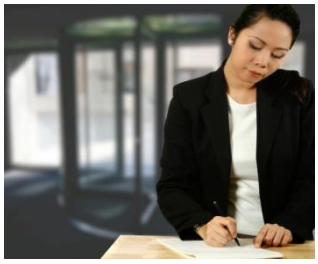


- Government statistics
- Libraries
- Internet
- Government websites
- Private market research firms
- Trade, professional and business associations
- Newspapers and magazines
- Business and industry-specific journals and periodicals.

## Recollection of personal observations and experiences

Naturally one of the best types of information that can be used by a sales person is that which has been personally collected or experienced. The first reference point when collecting information for a client is to recollect personal observations and experiences

This includes:



- Previous bookings
- Discussions had with previous clients
- Familiarisation tours previously conducted
- Personal notes
- Report and findings
- Log books
- Records of interviews
- Notes of first-hand meetings.

## Accessing internal information



In the majority of cases, tourism product and service information that is required for possible inclusion tourism packages service activities can be obtained through the investigation and extraction of data from internal information systems.

As you can imagine, collecting information from internal sources is certainly more cost and time effective than sourcing from external sources. Therefore it should realistically be the first place to look when seeking information.

Not only will it be 'on hand', it is often tailored to the needs of the operation and can identify more accurately what is happening inside the business more than information obtained externally.

### *Types of internal information sources*

Internal information may be obtained from a number of different sources depending on the scope, nature and technological capabilities of the host enterprise and may include:

- Customer databases
- Sales figures and statistics
- Data from sub-agencies and head office
- Customer feedback information
- Automated information systems
- Computerised reservation systems
- Products and services inventories.



### *Utilising colleagues, supervisors and managers*

These people are your first-line sources of information. You should feel free to ask them questions whenever you need to find information.

Get to know them and actively seek out their opinions, experiences and views.

They can help you find out what is happening, where the business is heading, what they think of the industry and its various stakeholders and what they intend doing personally.

Information may be sought from:

- Head Office
- Other businesses within the chain
- Management
- Colleagues
- Customers.

Quite simply requesting information may include:

- Asking internal colleagues to provide existing information through:
  - Statistical and written reports
  - Surveys
  - Checklists & Flowcharts
  - Meetings
  - Discussions
  - Emails
  - Training sessions
- Requesting colleagues to manipulate existing data in order to generate new data
- Collecting information from a centralised 'share' drive
- Looking at the company 'intranet' site.




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## Gathering feedback from customers

Understanding customers and their preferences is a very important aspect of a business.

Therefore feedback from other clients who have experienced a specific tourism product or service firsthand can be invaluable in recommending and finding out accurate information.

Therefore being able to collect feedback is very important to understand what tourism products and services should and should not be recommended to other clients.

In addition, feedback from clients regarding whole travel experience, including services provided by your company, can help ensure improvements can be made, where necessary.

Asking clients for feedback:

- Verbal or written
- Individual based
- Structured or unstructured formats.

### *Formal feedback*

This approach is used when established avenues have been established to collect information and feedback.

These approaches include:



- Customer comment cards – these are established documents aimed at getting responses to a wide range of questions covering all facets of an operation
- Interviews and follow up calls – at times management may contact customers to find out about their experiences or visits
- Testimonials - can be a formal statement testifying to:
  - Someone's character, performance, professionalism, qualifications, skills or achievements
  - The virtues of a company and the products and services it provides
  - A tourism product or service they have experienced
  - How the experience benefited them on a personal basis.



### *Informal feedback*



This approach is a very effective way to get feedback. This information may come in the form of 'gossip' or 'through the grapevine', however is the provider of the largest amount of feedback.

Informal feedback involves collecting information and feedback outside the above mentioned formal avenues. This includes:

- General discussion – whether with fellow staff or with customers, by interacting with people, you can get a good feel of what people are thinking
- Observations – this is a great form of feedback. It is encouraged that staff observe the actions and reactions of customers and fellow staff. Most people are often uneasy about truthfully giving negative feedback, so this approach is useful in getting an accurate reading of what people are thinking in different situations.

## Arrange to receive external information

Naturally there will be a number of suitable ways in which to make contact with organisations when seeking information. Given that most organisations may not be in your immediate geographical location, personal face to face contact is not possible.

Methods of contacting businesses include:



- Telephoning targeted organisations
- Making face-to-face requests of staff that visit their office
- Making e-mail requests
- Registering to receive information, newsletters and up-dates
- Paying to receive material
- Asking organisations to forward information.


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## Visit identified sources

At times you may be required to visit identified sources.

This opportunity to gather a first-hand understanding of the source, including key personnel who will be instrumental in sharing information is very beneficial.

### *Benefits of visiting identified sources*

It is extremely advantageous to visit sources as they provide a first-hand opportunity to:

- Meet key personnel
- Talking with personnel to obtain, clarify, update and identify supplementary relevant information
- Gain an understanding of the operation
- Viewing operations and making personal observations
- Clarify and explain your request for information
- Receive electronic and hard copy files in a manner that is more user friendly than delivering them through other sources such as emails or courier services
- Reviewing additional information available at the source
- Get any questions answered
- Identify the potential of informational sources that can be utilised at a later date
- Recording interviews and taking photographs or other recorded images.



## Establishing industry networks

### *Developing your own industry network*

As a member of the tourism industry, it is vital to build your industry network. This involves reaching out to all people in all aspects of the industry and discussing industry happening, trends and current information. The more people you meet and the more information you accumulate provides you with a sound understanding of the industry and will help your career progression.

### *Networking with industry colleagues*

It is very worthwhile to network with industry colleagues when you get the opportunity to attend product launches, seminars, educationals and the like.

You are not only constantly learning but you are also mixing with other tourism professionals, many of them having knowledge, experience and skills that you do not have.



# 2.3 Assess applicability of identified products and services to proposed packages

# 3.1 Identify pre-planning requirements for packages

## Introduction

Once you have conducted research and collected a range of possible products and services for inclusion in a tourism package, it is important to assess where they can be included from a practical perspective.



Whilst, in theory, different types of products may be combined to make the perfect package, however the practical logistics of placing them together may not make it possible.

There are many factors that need to be taken into account when selecting appropriate products and services for inclusion in packages.

This section will focus on the 'practical' aspects or considerations when selecting final products and services from those identified as part of the research process.

## Determining rates, costs, fees, charges, taxes for each package component

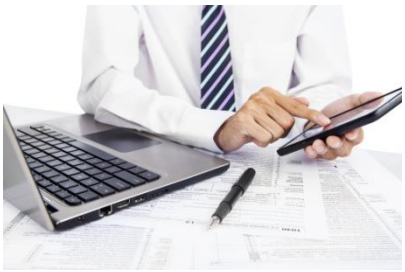
Naturally, the first consideration that will determine practicality of a package is the cost.

Whilst the proposed 'experience' may be perfect, if it is outside the budget suggested by the client, it may cause concern for the client.

In section 3.4, the different costs associated with costing a tourism package will be outlined in more detail.

That said, in summary costs include:

- Accommodation
- Meals
- Transfers
- Amenities/entrance fees
- Equipment hire or use
- Wages/fees
- Profit margins
- Taxes
- Exchange rate fluctuations
- Commissions
- Insurance
- Visas and permits.




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## Evaluating availability on a short-term and on-going basis, as required by the nature of the package

Like in any business, it is not wise to promote products and services that are not available on a consistent basis.

Understanding the availability of a product or service includes:

- Identifying consistency of availability – is the product always available or sporadic
- Identify when items will be available – whether based on seasonality, demand, special events
- Identifying when items are not available
- Changes in prices – based on seasons or demand
- Conditions of availability – do clients need to book for a minimum duration or as part of a tour
- Conditions of booking to confirm availability including:
  - What has to be booked and confirmed
  - The terms and conditions
  - Deposit and payment amounts (dates due)
  - Acceptable forms of payment.




## Calculating return on investment, including consideration of loss leader implications

This consideration is solely aimed at meeting the needs of the organisation.

If the organisation does not make money out of selling products and services, it makes it hard to justify spending time and money researching and booking items on behalf of a client.

This investment may include:

- Time spent to research items
- Phone calls to be made to possible suppliers
- Wages spend undertaking various activities
- Opportunity costs where staff can be undertaking other, profit making, activities
- Booking fees.




That said, at times clients may offer items to the client, where no profit margin exists or in fact a loss may be made, in the following circumstances:

- The client generates significant income for the organisation
- The collective sum of the total package is still profitable
- The item is an essential inclusion in the whole package, such as transfers to a remote location.

## Assessing compatibility with company image and reputation

The products and services identified must fit into the image of the organisation.



If the organisation is seen as a leader in 'luxury' experiences it should not focus on travel experiences in which they have limited experience, such as budget accommodation and trips aimed at the student market.

In addition, suppliers may offer items may generate high profit margins, but if little is known about them, not only may it put your reputation in danger, it may actually put the safety and security of clients at risk, let alone your clients having a negative experience.

## Verifying reputation of products and services, including assessment of client perceptions in relation to potential carriers, suppliers, destinations, products and services

This leads on from the previous point.

It is essential that any supplier selected has been verified as a reputable supplier of specific products and services.

Not only do you want to use a supplier that is reputable, but more importantly is legally able to operate. It is important to check any registration or licencing obligations required by suppliers in the operation of different products and services.

## Identifying features and benefits, including comparisons with similar packages offered by competitors

In any competitive market, clients may choose to look at different travel companies when seeking quotations for a tourism package.

Even if they do not look elsewhere they will certainly feel disappointed if what they were offered is not a competitive and attractive value for money offer in comparison in what your competition is providing.

Even as a tool for developing a competitive advantage over your competition, it is important to regularly check your offerings against that provided by competition, be it in your local region, online or directly offered by the supplier themselves.

## Checking match between products/services and identified objectives and client demand/requests for the package

Whilst it may appear obvious, but it is important to constantly look back at the original demands of the client and the organisation and ensure the items included in packages reflect these needs.

At times, it is easy to be side tracked by products and services that may appear spectacular or be something that may be of interest to you, but not for the client.

That said, you may offer some items that slightly differ to what the client has originally asked for, whether it be in terms of price or location etc., but it must not be a massive deviation from the original request. In addition, these deviations must only be included if you feel it will add to the experience to the client.


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## Determining destination characteristics

It is important to careful look at the characteristics and features of the destination in question including but not limited to:

- Accessibility and transport
- Accommodation and attractions
- Facilities
- Seasonal influences
- Degree of infrastructure
- Government regulations
- Special events
- Supporting venues
- Human resource potential to deliver required services
- Promotional potential
- Existing promotional material
- Weather
- Retail outlets
- Medical services
- Banking services
- Ancillary support services
- Legal considerations.



## Understand local laws and regulations

It is essential that any activities to be promoted take into consideration local rules and regulations. These laws may relate to:

- Entry requirements
- Insurance
- Age related issues - drinking of alcohol, renting cars etc.
- Prohibited areas.




## Identifying cultural considerations

If your offering involves visiting a place where clients from different cultural groups live, these cultural differences need to be taken into consideration.

It is important to recognise any special customs and codes of behaviour that may apply.

## Meeting special needs

It is essential that any products and services selected as part of a tour can accommodate any special needs or requirements of clients.

Special needs may focus on physical disabilities or other special needs.

**Physical disabilities**

- Mobility restrictions
- Sight impairment
- Hearing impairment.

**Dietary requirements**

For a variety of reasons, people have certain foods they must avoid including:

- Allergies - dairy products, peanuts are the most common
- Celiac menus - gluten free products - no wheat, barley or grains
- Vegetarian - no meat products (some vegetarians will eat white meat or seafood)
- Lacto vegetarian - no meat and no dairy
- Vegan - no meat, eggs, dairy or any ingredients derived from an animal
- Diabetic - avoid refined carbohydrates, sugar, fats and salt.



**Infants and babies**

When promotion products and services to clients with infants and babies, it is essential that facilities such as strollers for rent, baby care centres, a place to prepare formula and warm bottles and diaper changing facilities are available or accessible.


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# 2.4 Select products and services for the package

## Introduction

Now that products and services for inclusion have been assessed for practicality, it is now time to select the final items that are to be included in a quotation and itinerary for a client.

This section explores some of the activities associated with selecting products and services.

The role of identifying and selecting suppliers of products and services will be explained in more detail.

## Activities associated with selecting products and services

Activities associated with selecting appropriate products and services for inclusion in packages may include:

- Identify list of final products and services
- Identify suitable suppliers
- Aligning with identified objectives
- Complying with client requirements
- Ensuring availability of products and services
- Negotiating agreements with suppliers, carriers and providers
- Organise supply of components and, where required, confirm agreements in writing.
- Ensure specific inclusion descriptions and cancellation policies are confirmed with the supplier
- Check and incorporate legal requirements for offering and promoting packages
- Present pricing structures to clearly indicate all inclusions and exclusions and add-ons
- Finalise and confirm details in writing.
- Ensuring value and potential saleability.





## Identify types of suppliers

To date in this section, we have explored the different types of travel related products and services that may be sought for inclusion in a quotation.

It is important to remember, that these products and services may be booked directly or supplied through a number of suppliers.

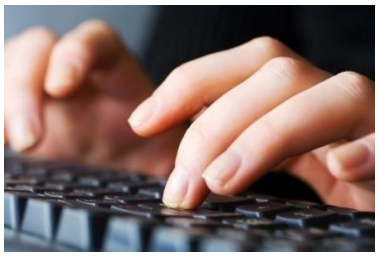
These include:

- Principals / suppliers- Provide services to the wholesalers, inbound tour operators and the travel industry
- Wholesalers / tour operator - Packages different supplier services such as airfares, accommodation, coach tours, days tours, cruises, transfers, rail tours and rail travel, adventure tours and many other services
- Inbound tour operators - Provide travel solutions to overseas wholesalers on a specific destinations
- Airlines, coach companies and rail - Provides international, interstate and intra travel services in most destinations
- Retail agents - Provide and sell travel packages, principal and supplier services, airline, coach and rail services to the public
- Ticket consolidators
- State and regional tourism authorities
- Conference, event and incentive companies.



## Consider existing agreements & preferred suppliers

Your selection of suitable suppliers will to some extent be influenced by any existing commercial agreements, commonly termed preferred agreements that may be in place in the organisation where you are employed.



There are many suppliers out there, and sometimes it is difficult to know who to use and trust. Companies often have 'preferred' arrangements with suppliers. You will need to ask your manager for the list of 'preferred'.

A preferred agreement is a formal commercial agreement between a supplier and a travel agent which facilitates the payment of extra commission and other benefits by the supplier to the travel agent in exchange for the travel agents agreement to sell the suppliers product.

Where there are preferred agreements in place, the expectation is that these products will be displayed and sold over other similar product. To facilitate this, specific preferred product training, information and resources are extended to the travel agent.

If a supplier is on the preferred list, it usually means they have been thoroughly checked by your company. Their finances have usually been checked and passed, and any necessary licenses obtained. It also means that your company has gathered other feedback on this supplier as to what quality of service they provide. As the agent, dealing with a supplier from a preferred list, gives you peace of mind. You can be confident that you are dealing with a competent, professional and reputable company. This confidence then extends to the client.


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In addition to having their character investigated and passed, ‘preferred’ companies can also sometimes offer a commission override. This means a financial incentive to you to sell their product over others. These overrides are negotiated on your behalf usually by your manager, or in the case of bigger companies, by the BDMs – Business Development Managers.

‘Preferred’ agreements are exclusive and confidential arrangements. Both parties need to have trust in each other for it to be a successful relationship. The stronger these relationships become, the more lucrative they will be.

Dealing with a ‘preferred’ supplier will not guarantee success. It just reduces the risk. Preferred suppliers require constant monitoring by your company, to ensure they still fit the requirements. If you experience difficulties with a preferred, this needs to be reported to the appropriate person within your company.

## Identify role of suppliers

When taking into account suppliers, it is important to understand the role they perform in providing products and services to clients. This will help determine their suitability in providing products and service.

Supplier roles include:

- Selling destinations you need
- Selling transport you require – air, car, rail, coach, cruise etc.
- Selling accommodation style you require – hotel, motel, apartment, resort etc.
- Selling the appropriate level of comfort and inclusions your client needs
- Having competitive prices and offering value for money for your client
- Having a reputation for reliability, efficiency and easy payment
- Provide quality documentation
- Employ helpful and knowledgeable staff
- Pay competitive agent commission
- Have local representation.



## Activities in identifying appropriate suppliers

As seen above, many organisations will have preferred suppliers which they will use for the majority of their travel needs, however at times new suppliers will need to be selected or current suppliers reviewed.

Therefore activities associated with identifying suitable suppliers include:

- Identifying client requirements in terms of products and services
- Collecting information as to whom provides these products and services
- Identifying suitable suppliers
- Assessing alternatives against the identified requirements for the quotation
- Evaluating the alternatives against the given criteria for the quotation
- Accommodating host enterprise requirements in relation to the use of preferred suppliers, providers and carriers
- Aligning with established client preferences and individual client market research data/feedback




- Determine and select suppliers, providers and carriers to be provided as options to the client.


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## *Activity 9*

## *Conduct research to meet client requirements*



You are to explain how you will conduct research to meet the needs for a client who has come to your travel company, requesting a business trip to be arranged for three persons in his organisation

The travelling party consists of:

- Mr Wayne Hunt (himself) – Australian passport holder
- Mrs Sheena Irwin (his colleague) – British passport holder
- Mr Daniel Mabilia (his colleague) – American passport holder.

They have different passports and therefore may have visa requirements, given that their trip is 'for business meetings'.

Company details are as follows:

**ASEAN Corporation**

15 Jalan Stesen Sentral
Kuala Lumpur, Malaysia 50470
P) 60-3-2264-2100
E) w.hunt@asean.com

You can use your own personal details (address, phone, email, etc.) as a reference for his personal details.

**Proposed itinerary**

- They are travelling from and returning to Kuala Lumpur
- They have a proposed itinerary that is as follows:

| DAY | PROPOSED ACTIVITIES |
|---|---|
| Monday | AM Flight Kuala Lumpur to Jakarta |
| Tuesday | AM Meetings in central Jakarta<br>PM Recreational Activity |
| Wednesday | AM Flight Jakarta to Manila<br>PM Meetings in central Manila |
| Thursday | AM Flight from Manila to Hong Kong<br>PM Recreational Activity |
| Friday | AM Meetings in central Hong Kong<br>PM Recreational Activity (Golf) |
| Saturday | AM Flight Hong Kong to Kuala Lumpur |

### *Quotation Requests*

He has requested the following information:



- The dates of the travel are to be determined by the travel company, but they must be from Monday to Saturday
- They are to fly business class
- They must have separate hotel rooms
- The hotels must be centrally located and be rated a minimum of '4 star'
- Hotel rates must include breakfast. Their budget is USD$400 per night including taxes and breakfast
- A meeting room must be arranged for meetings at the hotel in which they are staying. They need a boardroom for 10 people including catering (tea, coffee, and biscuits) for three hours. No electronic equipment is required in the meeting rooms
- Transportation to/from all airports required. Hotel car preferable. In Kuala Lumpur transport options must be provided to/from airport from their office
- Any times stipulated as Recreational Activity is free for the travel agent to make suggestions and to provide costing. They are looking for general sightseeing with some opportunities for shopping to be included in one of the activities



- Suggested dining establishments for dinner in Jakarta, Manila and Hong Kong are required. They are looking for a 'high end local culinary experience' and have a budget of USD$100 each, per meal period, for food only
- The company will pay for all expenses using one American Express Corporate Credit Card
- Any further information relating to the travel can be reflected in your own personal details or recommendations
- All prices must be quoted in United States Dollars (USD$)
- As a travel agent, you are to mark up all costs by 3% as a profit margin.


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## RESEARCH STRATEGY

| KEY RESEARCH POINTS | METHOD OF RESEARCH | PRACTICAL CONSIDERATIONS | POSSIBLE SUPPLIER |
|---|---|---|---|
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| KEY RESEARCH POINTS | METHOD OF RESEARCH | PRACTICAL CONSIDERATIONS | POSSIBLE SUPPLIER |
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# Work Projects

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

2.1 Please complete the following activities relating to this Performance Criteria:

- Activity 8

2.2 Please complete the following activities relating to this Performance Criteria:

- Activity 9

2.3 Please complete the following activities relating to this Performance Criteria:

- Activity 9

2.4 Please complete the following activities relating to this Performance Criteria:

- Activity 9

# Summary

## Source products and services for packages

### *Identify sources of information for products and services*

**Tourism industry organisations**

- Airlines
- Other travel suppliers
- Suppliers and providers of support and ancillary services
- Accommodation
- Attractions and Theme Parks
- Tour Operators
- Inbound Tour Wholesaler
- Outbound Tour Wholesaler
- Retail Travel Agents
- Local, regional and national information services
- Meetings and Events
- Ministries of Tourism
- Tourism Boards
- Industry Authorities
- Industry Associations.

**Identify types of product and services information**

- Destination information
- Local community information
- International destination information
- Tours
- Attractions
- Activities
- History
- Geographical features
- Local customs and culture
- Climate
- Accommodation
- Amenities and services
- Airlines
- Car hire
- Cruises
- Transfers
- Rail.


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## *Sources of travel product and services information*

**Research information sources to obtain targeted information**

- Defining the research points
- Collect primary and secondary data
- Recollection of personal observations and experiences
- Accessing internal information
- Gathering feedback from customers
- Arrange to receive external information
- Visit identified sources
- Establishing industry networks.

**Assess applicability of identified products and services to proposed packages**

- Determining rates, costs, fees, charges, taxes for each package component
- Evaluating availability on a short-term and on-going basis, as required by the nature of the package
- Calculating return on investment, including consideration of loss leader implications
- Assessing compatibility with company image and reputation
- Verifying reputation of products and services, including assessment of client perceptions in relation to potential carriers, suppliers, destinations, products and services
- Identifying features and benefits, including comparisons with similar packages offered by competitors
- Checking match between products/services and identified objectives and client demand/requests for the package
- Determining destination characteristics
- Understand local laws and regulations
- Identifying cultural considerations
- Meeting special needs.

**Select products and services for the package**

- Activities associated with selecting products and services
- Identify types of suppliers
- Consider existing agreements & preferred suppliers
- Identify role of suppliers
- Activities in identifying appropriate suppliers.

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# Element 3:
# Create packages of products and services

## 3.1 Identify pre-planning requirements for packages

### Introduction

As seen in previous sections, there are a number of considerations that must be taken into account before the final tourism products and services for a package have been selected.

To avoid duplication, the detailed list of considerations will not be listed in this section.

That said, pre-planning requirements may relate to:



- Seasonal influences
- Dates of one-off events
- Client demand
- Position of other packages in terms of product life-cycle
- Activities being undertaken by the competition.

This section will focus on how to gather and record product information gathered for the inclusion in packages. Information relating to final travel packages are often included in quotations and itineraries which will be given to clients to help them decide suitable travel arrangements.

### Documenting packaging information and quotation

Most travel agencies will use a combination recording system to record:



- Customer detail
- Supplier quotations
- Travel agency quotations.

Regardless of the recording method used, it is essential that all information is recorded in a thorough and accurate manner.

Given that many travel agencies receive many requests for package information and in addition are required to produce quotations, it is essential that the recording method chosen enables any travel agent staff member, regardless of previous contact with customers, are able to understand:

- Customer requirements
- Information sourced to date
- Information provided to customers to date
- Communication discussions taken place to date.

Most travel organisations require staff to record notes using only jargon that is generic and that can be understood by the entire team.

In addition, to ensure that staff endeavour to be disciplined in the way they record any information collected or discussed with customers and suppliers at the time that they take place.

## Methods to prepare package information

There are two primary ways in which a travel agent will record and administer a customer's details and requirements in relation package information:

- Electronic – a computer record
- Manual – a hand written record.

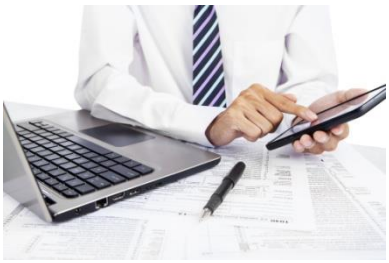
In both instances, most organisations will have a recommended format or input process for the collection and recording of this information.

All information relating to the quotation must be recorded regardless of the type of system used i.e. manual or electronic.

## Importance of recording accurate information

It is important that these records be accurately maintained to ensure:

- Efficiency – when referring to the quote
- Effectiveness – when making reservations or changes with suppliers
- Team work – colleagues may need to refer to the quote in your absence
- Profitability – mistakes cost money
- Enhanced customer service.



## Benefits of accurately recording information

If you are inundated with requests for quotations it may be possible to:

- Review and prioritise in order of importance
- Second one of your colleagues to assist you
- Reset agreed deadlines with customers
- Bring your situation to the attention of your manager or supervisor.


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## *Identify ways to record travel package information*

## *Activity 10*

You are required to outline the different ways travel agencies record travel related information for inclusions in packages for clients, including:

- Description of methods, policies or procedures used to record information
- Copy of a template used to record information.

**Description of methods, policies or procedures used to record information.**



## Planning package components

When developing package programs it is essential to keep the client's needs and expectation in mind. If you have researched well you will be aware of your client's requirements or general client profiles for various segments of the market and will be able to ensure that programs will meet their needs.

### *Preferences*

Client preference is the first consideration in the development of package products. Your client research should have determined their preferences. Keep these in mind when combining components.



Consider what experience your client is seeking. Ask if this combination will give them that experience.

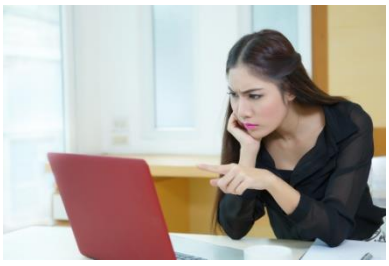
Try to add elements to the package that make it stand out from the ordinary routine of life. If you are packaging with a thirty-something market in mind try to provide components that will keep the vitality of the tourism experience in their mind as a contrast to everyday work and home commitments. In addition ensure that the combination of products and services works for your market.

### *Budget*

When combining components of packages it is important to ensure that the client's budget is considered. Some brilliantly inspired packages have been developed without keeping this essential aspect in mind and the result has been a product that was overpriced or under-priced for the client group.

If a product is overpriced it will fail to meet the needs of your clients and you will need to find alternatives.

On the other hand if a product is significantly under the price that your target market is prepared to pay for a package, they will tend to feel that there is something odd or flawed about it and may seek alternative operators.



The solution is to pitch the pricing somewhere, depending on the type of business, near the average pricing for similar products aimed at the target market ensuring that all components are weighted to the expected quality.

For example if a package tour is charging $400 per person per day on a ten day tour, booked into three nights accommodation at $50 hotels, your clients would feel that they had not received value for money.

### *Time constraints*

Another essential consideration for many clients of package tours is time. The package will often be booked for vacations from work or weekends which means that time is both limited and valuable. As social trends indicate that full-time workers seem to be moving away from one long vacation to several short breaks during the year, this should be factored into development packages aimed at this group. And there is no use in creating a 20 day itinerary for a special interest group because you think they should experience more destinations, if the client has asked you to quote on a 16 day itinerary.


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In addition, packages should give access to a range of quality options to ensure that the time spent can be of value to clients. Another implication of time constraints is limited travel time.

Few people with work or family commitments are prepared to spend more than two to three hours travelling to a destination they will be leaving again in a couple of days. Ensure that this considered in selecting locations of package components.

Time constraints do not always apply. In every target market there is potential for longer reward or relaxation breaks. Another growth market is the over-55 market. These people have generally retired and have few financial or family commitments and, as a result can often be interested in purchasing a longer tourism package that will give them an enjoyable experience.

If all of these aspects are considered in developing combinations of components for packaging the result should be a practical and saleable program.

## Steps in creating packages

The creation of a package involves the following steps:

1. **Identify the target group**

   Choose the target group before the theme which will allow you to design a tour which ensures that the tour will be of interest to everyone

2. **Determine the theme of the tour**

   Brainstorm a theme that suits the interests of the target audience.

3. **Now that you have your theme, establish objectives**

   Write down objectives of what you would expect the participants to get from the tour

4. **Choose a title**

   Choose a title that reflects the theme

5. **Determine the length of the tour**

6. **Create a tentative itinerary**

7. **Finalise the schedule**



**8. Arrange and confirm supply**

When components have been selected it will be necessary to arrange supply of the various components of the packages. In most cases it will be necessary to negotiate the following with your suppliers:




- Amount of units required
- Availability
- Inclusions – the service features that will be required
- The cost per person. Note that if you are planning regular packages for a predictable number, or if you can guarantee a minimum number, this will be more attractive to the supplier than an ad hoc agreement. Suppliers are also likely to look favourably on deals that guarantee them bookings in their low season
- Terms of payment. This should describe when and how payment will be made
- Cancellation policy details. Details of dates and conditions for cancellation including minimum booking numbers, cancelled services, refunds and forfeit amounts etc.

It is essential to confirm details of agreements with suppliers in writing. This minimises your risk of loss and ensures that specific requirements for package inclusion are set out. Keep copies of all agreements and/or contracts made with suppliers for reference in case these details need to be checked.

**9. Presentation of price**

Once you have calculated all the costs and your profit margin, you will need to present your selling price to your client. The method of doing this will depend on what sector of the tourism industry you work in and on organisational procedures. If your organisation has a brochure, costs will be presented in that brochure. Many organisations present formal and detailed written quotes. These quotes would include such details as:

- Cost per person
- If there are variable numbers of people traveling then various costs per person will be provided
- List of all inclusions
- Details of things that are specifically excluded
- How long the quote is valid for
- Deposit, full payment and sometimes cancellation conditions.

**10. Present your packaged program**

The final step of development involves making the package programs available to clients. There are a few things to consider, however, before promoting the package.


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# 3.2 Determine components of individual packages

## Introduction

From the standpoint of a potential client considering any form of tourist visit, the product may be defined as a bundle or package of tangible and intangible components, based on activity at a destination. The package is perceived by the tourist as an experience, available at a price.

There are a number of main components in the total product:



- Destination attractions
- Destination facilities and services
- Accessibility of the destination
- Images of the destination
- Inclusions and exclusions
- Price to the client - identified in Section 3.4.

Where these points have been included and explained in more detail, such as in Section 2.1, a summary will be provided in this section.

## Destination attractions

These are elements within the destination's environment, which largely determine consumers' choice and influence prospective buyer's motivation. They include:

**Natural attractions**

Landscape, seascape, beaches, climate and other geographical features of the destination.

**Built attractions**



Buildings and tourist infrastructure including historic and modern architecture, monuments, promenades, parks and gardens, marinas, ski slopes, industrial archaeology, managed visitor attractions generally, golf courses, specialty shops and themed retail areas.

**Cultural attractions**

History and folklore, religion and art, theatre, entertainment and museums. Some of these may be developed into special events, festivals, and pageants.

**Social attractions**

Way of life of resident population, language and opportunities for social encounters.

## Destination facilities and services

These are elements within the destination, or linked to it, which make it possible for tourists to stay, and in other ways enjoy and participate in the attractions. They include:

**Accommodation**

Hotels, apartments, villas, campsites, caravan parks, hostels, condominium.

**Restaurants, bars and cafes**

Ranging from fast food to luxury restaurants.



**Transport at the destinations**

Taxis, coaches, car rental, cycle hire.

**Sports/activity**

Ski schools, sailing schools, golf clubs.

**Retail outlets**

Shops, travel agents, souvenirs, camping supplies.

**Other services**

Hairdressing, information services, tourist police.

For some of these elements, the distinction between attractions and facilities may be blurred. For example, a hotel may well become an attraction in its own right and a prime reason for seeing a destination. Nevertheless, its primary function of providing facilities and services remains clear.

## Accessibility of the destination

These are the elements which affect the cost, speed and convenience with which a traveller may reach a destination. They include:

**Infrastructure**

Of roads, airports, railways, seaports.



**Equipment**

Size, speed and range of public transport vehicles.

**Operational factors**

Routes operated, frequency of services, prices charged.

**Location to major attractions and amenities**

How close is the premises away from attractions and amenities.


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## Images and perceptions of the destination

The attitudes and images which clients have towards products strongly influence their buying decisions. Destination images are not necessarily grounded in experience or facts but are powerful motivators in travel and tourism. Images, and the expectations of travel experiences, are closely linked in prospective clients' minds.

## Inclusions and exclusions

What products and services are included or excluded in package prices can greatly influence the decision to purchase.

Each person will have specific needs that they consider vital for inclusion, such as breakfast at a hotel, and are happy to pay for services that they may not use.

Therefore every client will look carefully at:

- Inclusion
- Exclusions
- Add-ons
- Available options, including substitutions and alternatives.





## *Determine components of a package*

## *Activity 11*

Based on your fellow participant's travel requests for their 'perfect holiday' as identified in Activity 4, you are to identify to different components of a package which you can include in a proposed package.



| TRAVEL COMPONENT | EXAMPLES |
|---|---|
| Destination attractions | |
| Destination facilities and services | |
| Accessibility of the destination | |
| Images of the destination | |
| Inclusions and exclusions | |
| Price to the client | |


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# 3.3 Determine duration for packages

## Introduction

The primary factor when determining the duration of packages will always be based on the needs of the client.



That said, the duration of a packages will be influenced by a number of factors, most of which are out of the control of the client. They will normally be based on suppliers of tourism products and services.

This section will explore some of the factors that will affect the duration of a package.

## Duration factors determined by the client

The factors, determined by the clients themselves, that will influence the duration of tours includes:

- Their budget - most clients will have a budget, that will be one of the deciding factors for the duration of their travels



- Designated dates - whether based on schedules meetings, school holidays or annual leave dates, to name but a few, most clients will be fairy set in dates of travel. Whilst these dates may have some degree of flexibility, often they will be fairly set
- Preferred destinations - naturally destinations, whether a single destination or where a number of destinations will be included in the package, will need to be considered. Especially travel time and modes of transport to be taken between destinations
- Preferred products and services - depending on what the client wants to experience, adequate time must be allocated to allow clients to undertake all they desire as part of their travel experience.

## Duration factors determined by suppliers

The factors, determined by suppliers that will influence the duration of tours includes:

- Schedules of set tours - if a client id to take a scheduled tour, these dates are often set
- Schedules of travel suppliers - the timetable of scheduled flights, cruises and connections will influence travel
- Supply and demand - different products and services have demand periods which may influence travel times and the duration of travel
- Supplier booking conditions - in peak times, suppliers may impose a 'minimum stay' policy to maximise revenue opportunities. In addition, during quite times that may have incentives to encourage travel such as 'stay 5 nights, get 3 nights free' promotions.

## Duration factors determined by other influences

Whilst there are an endless amount of influences affecting package durations, some of these include:



- Timing of specific events - whether sporting, cultural, religious or holidays, to name but a few, the dates of the events themselves will influence timing and duration of travel
- Seasonality - seasonal destinations will have specific seasons in which to travel. For examples resorts are best visited in hot and dry weather, African safaris are best viewed in winter when trees and bushes have limited leaves for animals to hide behind, flower festivals in different countries have limited times when they bloom.

## Determine duration of packages

Once you have taken into account the influencing factors as mentioned above, it is now time to determine the final duration of packages.

This process will include:



- Formulating packages to accommodate differing timelines in order to meet identified client need
- Checking availability of products and services for specific dates
- Adding and removing inclusions to enable attainment of required duration while still delivering value and enabling saleability of package.
- Providing alternate dates, suppliers or routes to best meet original client needs
- Complying with agreed arrangements with suppliers, providers and carriers.


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## *Identify special events that impact package duration*

## *Activity 12*



You are required to identify a range of special events that will impact the duration of a package, both within your country and in other countries in the ASEAN region.

**Events within your country**

| TYPE OF SPECIAL EVENT | NAME OF EVENT | DATES OF EVENT |
|---|---|---|
| Sporting | | |
| Religious | | |
| Holiday | | |
| Cultural | | |

**Events within another country within the ASEAN region**

| TYPE OF SPECIAL EVENT | NAME OF EVENT | DATES OF EVENT |
|---|---|---|
| Sporting | | |
| Religious | | |
| Holiday | | |
| Cultural | | |

# 3.4 Calculate price points for packages

## Introduction

Now that the final components have been decided for a package, it is now time to calculate the costing that will accompany the quotation for the client.

The costs to be calculated will involve a number of factors, not just the direct costs of the program plus a percentage of profit.

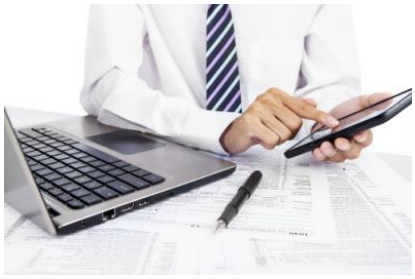
Naturally the cost provided to the travel company will differ to that to be included in a proposal as suitable mark ups will be determined in line with organisational profit expectations.

This section will explore in more detail the costing considerations that must be taken into account when determining final costs that will be presented to the client in a quotation.

## Activities associated with calculating costs of products and services

Whilst some of these activities will be explored in more detail throughout this section, the main activities associated with calculating costs of products and services should include:

- Ensuring comprehensiveness and accuracy of all information provided
- Taking into account price point considerations
- Negotiating costs with suppliers, providers and carriers to obtain optimal prices
- Identifying direct costs
- Calculating commissions that apply to the quotation
- Calculating mark-up net costs
- Identify organisational fees
- Applying host enterprise procedures to determine selling prices
- Including all relevant and legitimate taxes, fees and other charges to provide a quotation that has no hidden charges
- Incorporating currency conversions into the statement of prices, where applicable
- Factoring allowable discounts
- Considering and including package deals, where appropriate
- Taking into account seasonal and other premiums that may apply to bookings
- Estimations based on current year prices.




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## Costing price point considerations

Whilst it is essential to determine the actual costs for a package, including suitable profit margins, the price must still be in line competitively with what is being offered in the marketplace.

When calculating price points considerations to be taken into account include:

- Analysing prices offered by competition
- Determining target market affordability
- Ensuring required profit to host enterprise
- Identifying what the market will bear
- Developing price schedules, including special rates and discounts
- Determining host enterprise costs pertaining to package development and delivery
- Factoring in commissions.

## Negotiate costs with suppliers

In most instances travel agents are not required to negotiate costs with suppliers. Usually this is done by the wholesaler, tour operator or General Sales Agent and by specific people within the organisation, commonly termed product buyers.

There may however be occasions where in order to secure a particular product or service for your client you may be required to go outside of the recognised channels and deal direct with the principal e.g. for a group, charter, conference, special interest or some kind of unique product/service not offered by a local supplier or if offered, where the pricing is prohibitive.

In this situation the following may be negotiable.

- The gross price
- The commission
- The Nett price
- The currency
- The method of payment
- The deposit amount and deadline
- The final payment deadline
- The cancellation and/or amendment fees
- The allocation of seats / rooms / cabins
- The release back date for unsold allocations
- The deadline for final passenger names/numbers.



Bear in mind that while you may be able to negotiate a better price you will also be required to do a substantial amount of extra work in relation to the ongoing monitoring and management of product and services sourced in this way.

In many instances, particularly with a group, there is financial risk to the travel agent and substantial deposits should be collected from the client before entering into arrangements where you are dealing direct with the principal.

Also it is a good idea to research these suppliers to ensure that they are above board and that they genuinely offer and are able to provide the particular product and/or service contracted.

## Identifying direct costs

Direct costs include component costs for all tourism products and services included in the package. This may include such things as:



- Accommodation
- Meals
- Transfers
- Amenities/entrance fees – for National Parks, attractions, entertainment, events etc.
- Equipment hire or use – electronic equipment, conference requirements, special needs, etc.
- Wages/fees – organisation staff involved in delivering the product e.g. Guides.

## Calculate mark-up net costs and commissions to determine a profitable selling price

A large part of the job of a travel agent is sourcing the best pricing for your client's itinerary, while at the same time ensuring that you are earning a reasonable return for effort expended and service provided.




It is essential therefore that travel consultants are familiar with the terminology and understand the various accepted pricing models used in the travel industry.

The underlying pricing principle is a business will source product and services from various principals and suppliers at a rate that is sufficiently competitive to allow for a reasonable margin.

Product and services can include airfares, which are often packaged with other products and services and offered as an inclusive tour/travel arrangement.

The costing and pricing of these products and services will take account of currency exchange rates, margins for the wholesaler and the various levels of retail travel agent commission they intend to offer.

Here is an overview of the most common methods:



### *Method 1 – Gross price less commission*

1. Local suppliers such as hotels, guides, coach companies, transfer companies etc. sell their product to local tour operators at a rate referred to as net.


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2. The tour operators or wholesaler will contract for these services at the net rate and add a margin to allow for a reasonable profit. This rate is termed the net rate.
3. The tour operator or wholesaler will then add either a percentage or dollar amount to the net rate to allow for the payment of travel agents commission.
4. This then becomes the gross price for the product and service and it is this rate which is published in brochures and on websites.
5. The product is then distributed and sold to the client via various distribution channels, one of which is the travel agent network. In exchange for distributing (promoting and selling) their product, the tour operator or wholesaler will extend a small payment to the travel agent. This is termed travel agent commission.

The percentage commission paid will vary depending on the type of product and any preferred agreements that may be in place however it averages around 10% for land arrangements. Commission on airfares can be anything from no commission to a maximum of 9% with most being around 5%.

### *Method 2 – Net plus mark-up*

There are instances where a travel agent is offered or sources a net cost for a product or service.

The travel agent is then at liberty to mark up the net cost by adding a percentage or dollar amount to reach a gross price which is then provided to the client.

The amount of the mark-up (percentage or dollar value) is most often influenced by the organisation and the conditions in the market place.

In this instance the difference between the net cost and the marked up price represents the travel agent commission or margin. This typically applies to airfares where the airline or ticket consolidator will provide a net airfare to the travel agent.

## Identify organisational fees

It is important to disclose any fees determined by the travel organisation to ensure charges for sales and product co-ordination activities are clearly understood by the client

A schedule of all fees charged by an Agency is usually displayed on all travel consultants' desks. These fees are applicable to all domestic and international bookings, are charged to the passenger and include the following:

- Flight booking
- Frequent Flyer redemption booking
- Itinerary planning
- Land only booking
- Reconfirmation of airline reservations
- Passport/visa assistance
- International fax/phone calls
- Late booking fees
- Amendment fees



- Cancellation fees
- Credit card merchant fees.

Traditionally, the last four fees have always been imposed. The other fees have been introduced in recent years. These fees are displayed on the client invoice.

## Accurately calculate any additional taxes, special fees and other charges

There a number of factors that influence variations in product pricing. Here are some:

- Seasonality – high, shoulder, low or peak, off peak or combinations
- Validity dates – what prices apply to what dates
- Date of booking
- Date of travel
- Surcharges – weekend stays, extra bedding
- Restrictions – age, student, senior, nationality, validity of driver licence
- Standard – Luxury, moderate, standard, basic, budget or backpackers
- Inclusions/exclusions – meals, sightseeing, entrance fees, tour escort
- Bedding – single, twin share, triple, quad, multi/dormitory
- Child and infant costs – when is a child a child and when is an infant an infant
- Currency used and conversion rates
- Payments – early bird payments, instance purchase tickets
- Conditions of sale – book by for travel by
- Packages versus single items sold
- Stay Pay – stay 4 nights and pay for 3 nights
- Last minute deals and spot specials – used to fill remaining seats, rooms, cabins.





## Accurately calculate any required currency conversions

When dealing with airlines, wholesalers and suppliers, the price that they will advise will be in local currency. There may be certain cases when you will not receive a quote in local currency, but in a commonly used currency such as USD (United States Dollars).

Some examples may be that you are quoting a price to your passenger that is:

- Sourced directly from a supplier's website that does not have the option of local currency
- Quoting an airfare from an airline's website or reservations office where the airfare is only priced in their local currency, not YOUR local currency


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- Extra services provided by hotels - if unable to purchase in advance or your wholesaler does not offer that service as part of their contracted rate. e.g. meal packages, rollaway beds, wedding packages
- For some adventure or overland tours, there will be an additional amount called a 'Kitty' that cannot be prepaid in your country. It is collected by the tour leader at the start of the tour and your clients must be made aware of this amount before their arrival. The 'Kitty' amount is usually in USD to be paid in cash and is used to buy food and additional supplies while the group is on tour.

If you need to convert a foreign currency into local currency, you can use:

- The currency conversion command via your CRS systems (Galileo, Sabre or Amadeus)
- Websites such as:
  - Universal Currency Converter - http://www.xe.com
  - Travelex - http://www.travelex.com.au.

Before advising the final price in local currency to your client, ensure that you have used the correct conversion method and record both the foreign and local currency amount in the client file – just in case there is a cost discrepancy.

## Securing quotes and costs from suppliers

In order to calculate the cost for the arrangements requested you will need to contact the applicable supplier, tour operator and wholesaler for the individual components that you have selected based on the client's requirements.

Typically, contact is made via a call to the reservations area or electronically via a travel agent only area of the applicable website.

Both supplier websites and their brochures are good resources to use when researching product and services.

These 'agent only' access areas of supplier websites are user name and password protected and some will allow the agent to initiate a quote or booking.

**General considerations when securing quotes and costs**

It is important that when dealing with these suppliers that you bear the following in mind:

- Be polite and respectful at all times
- Have all the necessary information to hand before you make contact
- Have a pen and paper ready
- Listen and accurately record what you are told
- Get the name of the person you are dealing with
- Secure and record the quote reference number
- Request an email copy of the quote.



### *Securing tour operator quotes*

To secure a quote from a tour operator (e.g. Peregrine, Contiki Tours Holidays etc.) you will need:



- Your agency name, password or code
- Passenger names exactly as they appear in their passports
- Tour number, name of tour, departure date and departure city
- Number of passengers travelling
- Age of passengers – especially children
- Room type and configuration – single, twin, triple
- Any additional requirements – airfares, transfers, pre and post tour hotel accommodation.

### *Securing wholesaler accommodation quotes*

To secure a quote for an accommodation package with a wholesaler (e.g. Tempo Holidays) you need:



- Your agency name, password or code
- Passenger names exactly as they appear in their passports
- Accommodation name
- Number of night required – in and out dates
- Early and late check-in, check-out out or day use
- Number of passengers travelling
- Age of passengers – especially children
- Room type and bedding configuration required - single, twin, double, triple, king, queen, adjoining rooms, kitchenette, 1 or 2 bedroom apartment
- Any additional requirements – airfares, transfers, meals, tours.

### *Securing wholesaler cruise quotes*

To secure a quote for a cruise wholesaler e.g. (P&O, Crystal, Cunard, Carnival) you need:



- Your agency name, password or code
- Passenger names exactly as they appear in their passports
- Name of the ship or cruise company name
- Cruise name, number and date of departure and departure port
- Number of passengers travelling
- Age of passengers – especially children and seniors
- Cabin type, bedding configuration required - single, twin berth triple berth, quad berth, inside, outside, cabin, deck name or level, balcony
- Any additional requirements – airfares, transfers, pre and post cruise accommodation.


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### *Securing car hire quotes*

To secure a quote for a car hire or motorhome (e.g. Drive away Holidays, Avis, Hertz, Budget) you need:




- Your agency name, password or code
- Passenger names exactly as they appear in their passports
- Vehicle type or code – size, air conditioned, petrol or diesel, manual or automatic
- Number of passengers travelling
- Age of passengers – especially those under 25 years and any children
- Pick-up and drop off dates – duration impacts rate
- Pick-up and drop-off times – important when calculating number of days
- Pick-up and drop-off location – fees apply for one way rentals
- Number of drivers - often surcharges apply for additional drivers
- Where the client plans to take the vehicle – some countries are restricted
- Any additional requirements – baby seat, GPS, ski racks.

### *Identifying final supplier details and costs*

At the conclusion of the process, you should ensure that you have secured and noted down the following information:



- The name of the supplier, wholesaler, tour operator
- The date, time and name of the person providing the quote
- The detail of the various products or service and the price – make a special note of the pricing structure i.e. per person, per rental, per room etc.
- Quote reference number.

All these details should be recorded, either written or electronically, against the clients quotation file for future reference. It is from these notes that you will compile and prepare the quotation for the client.

In addition, it is vital that once the written email copy of the quote is received, that the content is checked against notes taken at the time of securing the quotation. This should be done before written or verbal quotations are provided to the client. It is not unusual for there to be discrepancies which must be rectified immediately.

Mistakes are costly.

## Check all calculations against all product and service components

Prior to providing the client with a quotation you must check all your calculations in relation to the prices secured.

The process of collating and pricing the itinerary must include checking the detail of the products and services as well as how these have been priced e.g. per person, per night, or per rental etc.

Pricing for air fares is always per person and will consist of the airfare and the taxes which are subject to change up to and until the booking has been ticketed.

The common ways in which other products and services are commonly priced and published have been identified below.

| Product / Service | Costing method |
|---|---|
| Tours | Per person twin share |
| | Single supplements usually apply for single passengers |
| Accommodation | Per person per night twin share |
| | A sole guest will pay twice the twin share rate i.e. room rate |
| Car rentals | Per day which is equal to one 24 hour period |
| Motor homes | Per day or per week (1 day is equal to one 24 hour period) |
| Transfers | Per person per one way transfer – seat in coach/ferry/bus |
| | Per car or limousine per one way transfer |
| Cruises | Per person per cabin twin share |
| | Sole use of a cabin will be priced higher than the twin share price |
| | Port charges and taxes |
| Rail | Tickets – per person per one way/return journey |
| | Passes – per person per pass |


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**Additional cost considerations**

Apart from the detail of the actual products and services and the applicable prices, there are other considerations which you must also check and take account of:




- Mandatory organisation service, transaction or planning fee etc.
- Insurance
- Visa – are they required and how much will they cost?
- Merchant fees – most credit cards incur these fees which are between 1 – 4%
- Any taxes and levies which are payable direct and which are not included in the quotation
- Extra charges such as hire of GPS, baby seat, child booster, snow chains, roof rack, rollway bed, baby cot charge etc.
- Exchange rate fluctuation – if applicable.

Validity of prices must be noted. For example, a price may only be valid if the product or service is booked and deposited by a certain date, failing which the price will increase. Cruises, tours and airfares are typical examples.

You need to clearly indicate any applicable deadlines in relation to pricing and related payment e.g. deposits, part or full payment. Quotations provided to travel agents by supplier, tour operators or wholesalers will specify how long the quote is valid for, usually 7 days, after which they reserve the right to amend the prices.

Tour companies and wholesalers will sometimes guarantee prices for products only once the quote is converted to a booking and the deposit has been paid and received. Others may only guarantee prices once the booking has been paid in full and some companies will always reserve the right to amend the prices or surcharge the product in the event of drastic currency fluctuation.



Any supplier terms and conditions must be considered and noted over and above any of your own internal organisation specific, terms and conditions. For example some travel agents may not offer 7 day validity on quotations; they may only be valid for 24 or 48 hours.

Where prices have been calculated in a currency other than your local currency, it is also important to record the currency used, the exchange rate and the date the calculation was done.

You may also be required to record actual or estimated commissions. Where you have sourced product or services direct, at a net rate, you must also record how you calculated the final gross selling price i.e. the mark-up/ margin for each product or service.

## *Activity 13*

## *Identify costs for Activity 9*



You are required to identify accurate costs for the trip requested in Activity 9.

You are to show your calculations on a template of your choice.

Following is an example that can be used:

| TOURISM PRODUCT OR SERVICE | DETAILS | DATE/S | COST | MARK UP / COMMISSION | ORGANISATIONAL FEES | ADDITIONAL FEES / TAXES | FINAL COST |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
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| TOURISM PRODUCT OR SERVICE | DETAILS | DATE/S | COST | MARK UP / COMMISSION | ORGANISATIONAL FEES | ADDITIONAL FEES / TAXES | FINAL COST |
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| TOURISM PRODUCT OR SERVICE | DETAILS | DATE/S | COST | MARK UP / COMMISSION | ORGANISATIONAL FEES | ADDITIONAL FEES / TAXES | FINAL COST |
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# 3.5 Develop terms and conditions for the packages

## Introduction

All package quotations will come with terms and conditions that will apply to various aspects of travel arrangements.

Terms and conditions may be provided by:



- The travel agent themselves
- Suppliers
- The individual product or service provider.

You are strongly advised to refer to these terms and conditions when providing a quotation for your client.

It is essential that any terms and conditions are clearly identified and that clients understand them.

## Types of terms and conditions

Whilst there may be an endless set of terms and conditions that may be established, to suit the needs of the respective suppliers and providers, taking into account organisational requirements and the nature of their services, there are common terms and conditions that relate to most travel related quotations.

General terms and conditions include:




- Terms and methods of payment, including dates for payment of deposits and final payment
- Notifications regarding final confirmation of the booking and, where relevant, numbers
- Cancellations and alterations, including timelines and charges
- Commissions due or payable
- Procedures and charges that apply to name and date changes for the booking
- Guarantees and warranties that apply to the products and services covered by the quotation
- Exclusion and limitation of liability clauses
- Identification of the period for which the quotation is valid
- Whether or not the quotation is subject to change with or without notice
- Reference to associated terms and conditions as imposed by third party providers
- General industry rules, regulations and codes.
- Complaint handling.

## Booking conditions

Common booking conditions include:



- How to book – who to contact
- Amount of deposit required
- Prices and validity
- Assumption of risk
- Exclusion of liability
- Payment and ticketing deadlines
- Extension ticketing deadline
- Cancellation by the supplier
- Force Majeure
- Cancellation by the travel agent
- Cancellation charges
- Availability of any type of change to booking
- Availability of changes to class of booking
- Types of booking amendments and amendment fees
- Complaints
- Authority of suppliers and tour leaders
- Baggage allowance and excess baggage charges
- Health, fitness and age limits
- Publicity and Privacy
- Governing law.



## Travel Agent Terms and Conditions

Each product or service included in the quotation will have a set of general conditions which will be provided to you by the wholesaler or operator that you are utilising.

They will commonly include terms and conditions relating to:



- Deposit and how to book
- Payment Options
- Amendments
- Final Payment
- Cancellations and refunds.


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Following is an example of travel agent terms and conditions.

***TRAVEL AGENT – TERMS AND CONDITIONS***

*For full terms and conditions relating to our products and services, please refer to the full terms and conditions as outlined in our brochure and on our website.*

*Deposit and how to book*

*In order to place a reservation, a non-refundable deposit of $250.00 per person is required. Bookings made within 45 days of departure will require full payment at time of placing the reservation.*

*Receipt of the deposit indicates to our organisation that the traveller has agreed to their confirmed travel arrangements. Deposits paid are non-refundable.*

*Payment Options*

- *Cheque*
- *Smart Money*
- *Money Direct*
- *Credit Cards – AMEX VISA MASTERCARD + Merchant Fee*
- *Direct deposit*

*Amendments*

*Should the reservation be altered after the original booking has been confirmed a fee of $150.00 per amendment will be applied to cover additional administrative and communication costs.*

*Depending on the nature of the change, seasonal price adjustments, additional costs or cancellation fees may also be applicable.*

*Final payment*

*Full and final payment is required no later than 45 day prior to departure.*

*If payment is not received by the due date, our organisation reserves the right to treat the booking as cancelled and will apply full cancellation charges as specified.*

*Cancellation and refunds*

*Cancellation fees for some programmes may vary from those stated below. Please check at the time of booking. If the reservation is cancelled the following per person fee will apply:*

- *Up to 45 before departure loss of deposit*
- *Between 45-30 days up to 50% of total cost*
- *Within 30 days of departure up to 100% of total cost*
- *After departure no refund for any unused service*

*All costs are subject to alteration and currency fluctuation without notice, up to and until full and final payment is received.*

## Supplier terms and conditions

It is important that all supplier, wholesaler, operator conditions are highlighted to the client together with your own travel agent terms and conditions.

Here is an example of a standard travel agent attachment. These, or a similar document are routinely used as an appendix to written or email quotations or as a hand out for clients.

***SUPPLIER – TERMS AND CONDITIONS***

*Validity*

*All quotes provided are valid for 7 days from date of issue and are subject to availability and change.*

*Car Hire*

*Car hire companies will require a credit card deposit and/or guarantee upon pickup of vehicle.*

*Hotel Check In/Out*

*Most hotels have a check in time of 2pm and check out time of 10am. Should you wish to arrive or depart outside of these times, a room may only be allocated to you subject to availability.*

*Flight Schedules*

*Flight schedules are subject to change. We will endeavour to notify you as soon as possible if your itinerary is affected, but please be aware that changes are out of our control.*

*Amendment and Cancellation Fees*

*Cancellation charges can be up to 100% depending on the reason for and time of cancellation. Please refer to the terms and conditions in the brochures provided.*

*The operator will impose cancellation and amendment fees and we strongly suggest you peruse these conditions carefully. In addition, depending on the rules and conditions of the airfare purchased, the airline will charge cancellation and amendment fees.*

*Insurance*

*Travel insurance is strongly recommended for medical, cancellation and unforeseen circumstances. Please carefully read the conditions and inclusions of your selected policy, so you know you have adequate cover.*

*Taxes*

*Most countries now require taxes to be paid in advance. Any taxes already paid are detailed in your above costing. They are however subject to change at any time prior to the air ticket being issued.*


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# Booking Conditions

**Please carefully read the following conditions as they form the basis for acceptance of all bookings.**

**To Book**
Select the holiday of your choice and then consult your Travel Agent who will make the reservation request with Explore Holidays. All reservation requests are subject to availability at the time of booking. Any verbal, written or electronic quote is an estimate only of the price. If your holiday is available, Explore Holidays will provide to your Travel Agent a written reservation confirmation which will include the price.

**Late Bookings**
Bookings made 7 days or less before departure from Australia incur a charge of $25 per booking. Certain products may incur late booking fees more than 7 days before departure or may incur a higher fee. This will be advised at the time your booking is made. Late bookings require a payment guarantee in order for the request to be generated.

**Deposits**
In order to secure a booking, a non-refundable, non-transferable security deposit must be received by us from your Travel Agent within 7 days of reservation confirmation. The security deposit is normally a minimum of $165 per adult ($77 per child). Certain products require a deposit of up to $2000pp within 7 days of the booking being made. A further deposit may be required by the hotel, tour operator, cruise line or other principal. This will be advised at the time your booking is made. Failure to pay the deposit by the due date will lead to cancellation of your booking.

**Final Balance**
The balance of the price must be received by us from your Travel Agent normally not less than 42 days before your departure from Australia. Final balance for certain products is required at least 100 days before departure. This will be advised at the time your booking is made. Late payment may lead to cancellation and/or late documentation, which may not be issued until we are in receipt of payment in full. Airfares have limited validity or are required to be booked and paid for a certain time before travel. Please consult your Travel Agent for applicable airfare conditions.

**Credit Cards**
For any deposits or final balances payable, if you elect to pay for your holiday with a credit card, an additional charge of 1% of the amount being charged to your credit card will be added to the invoice value of the booking. The company reserves the right to vary this 1% charge. An additional 2.5% credit card service fee will be applied to all Diners Club and American Express payments received for bookings with Explore Holidays.

**Cancellation Charges**
**1) Land Arrangements**
(a) Bookings cancelled at any time after confirmation are subject to the forfeit the security deposit, including any additional deposits required by suppliers.
(b) In addition to this fee are any charges made by the hotel, tour operator, cruise line or other principal. This can amount to up to 100% of total land arrangement costs, particularly when cancelling tours and other arrangements within 60 days of departure. Some provider cancellation charges may also incur GST. You should check what additional cancellation fees apply (if any) BEFORE paying your deposit.
**2) Airfares**
A cancellation charge, up to 100%, may be applied depending on the conditions of the airfare.

**Amendments**
Except as stated below, no fee applies for the first amendment or to extend an existing booking before documentation is issued.
(a) Air tickets, rail, cruise, or any service where any proposed amendment may be treated as a cancellation.
(b) Second and subsequent alterations, excluding extensions or additions after confirmations, will incur a $25 fee per booking.
(c) After documentation is issued a $33 fee for any change will be incurred.

**Refunds**
No refund is available for cancellations after travel has commenced or in respect of any tours, accommodation, meals or any other services not utilised. Credit Offers cannot be refunded or taken as cash.

**Unused Services**
Explore Holidays does not authorise the employees of any overseas supplier to promise refunds to clients.

**Lost or Destroyed Vouchers**
Lost or destroyed vouchers cannot be replaced or refunded for any accommodation plans, rail, transport, museum, exhibit and sightseeing tickets.

**Extra Service**
Explore Holidays and associated representatives overseas will not accept responsibility nor approve requests to pay for additional charges for extra services requested by clients and not included in the basic prices stated in this brochure. It is your responsibility to settle these charges, if any, before departure including parking fines or parking fees incurred when a rental vehicle is used.

**Extra Hotel Nights or Car Rental Days**
The special rates shown are available only when booked and paid in advance of your departure from Australia. Should you wish to obtain extra nights or additional days car rental when overseas the cost will be at the normal published rates and the amendment must be made directly with the supplier noted on the passengers vouchers and not through Explore Holidays. Any additional costs are to be paid by the passenger directly to the individual supplier.

**Prices and Itinerary Changes**
(1) Prices are based on currency exchange rates effective September 2006 and international airfares in effect at September 2006. They are quoted in Australian dollars and are GST free unless otherwise indicated.
(2) Details of particular hotels and holidays described in this brochure may have changed since publication. Changes in airline fares and exchange rates and other changes may also affect the price of particular holidays. You should ask your Travel Agent to check whether such changes have occurred in the price or itinerary BEFORE YOU BOOK and WHEN YOUR BALANCE IS DUE. Every endeavour will be made to advise you of any changes after you book.
(3) Special offers can be withdrawn at any time.
(4) The prices quoted by Explore Holidays are subject to change without notice in the event of unforeseen circumstances such as fluctuation in exchange rates and/or increases in land and airfare costs, airport charges or government taxes. No surcharges in respect of cost or currency deterioration will be made once full payment for your arrangements has been received. **This guarantee does not apply to any taxes, charges or levies imposed by any government or their agencies or to errors or omissions.** In exchange for these guarantees no refund will be made if costs are reduced. The entire range of products featured is offered at the selling prices shown on each page but prices printed do not imply that similar product may or may not be available at a lower price if obtained direct. However, payments sent overseas by travellers are excluded from the protection provided by Travel Agent Licensing and membership of the Travel Compensation Fund. Itineraries are subject to alteration if airlines schedules are amended, a tour is cancelled by the operator for whatever reason, or other conditions require it. If, in the unlikely event that we have to cancel your booking because of insufficient numbers booked or because of events outside our control we will, if we are able to, offer you an alternative tour or arrangements of a similar standard. If you do not accept the alternative we will refund in full any monies already paid for that particular tour or arrangement.

**Room Types and Bedding Guide**
Prices in this brochure are based on existing bedding. Additional bedding may be either a bed, or a fold up 'rollaway' or a convertible settee. Please note: Triple share generally refers to three people sharing a room but NOT the provision of three separate beds. Hotel rooms are generally 'Run of House' unless otherwise stated. Particular room requests (e.g. interconnecting, twin vs double bedding, non-smoking rooms etc.) can be requested, BUT ARE NOT GUARANTEED AND ARE SUBJECT TO AVAILABILITY ON ARRIVAL.

**Hotel Information**
Whilst Explore Holidays makes every effort to ensure accuracy in hotel information and descriptions, we are reliant on the suppliers and hotels giving us accurate data. Since hotels are constantly changing facilities and services, we cannot be liable for any errors or omissions herein or for any disruption caused by hotel or apartment renovations. If any feature is of critical importance to your holiday, it is the passenger's responsibility to ask Explore Holidays to check whether such features will be available at the time of occupancy at the given hotel.

**Changes of Hotels**
If for any reason the hotel(s) nominated herein is/are unavailable, an alternative will be sought/offered. If, after confirmation, the hotel becomes unavailable, you will be assigned to a hotel of similar or superior standard.

**Brochure Content**
Route maps and photographic illustrations are for general purposes only and are not intended to indicate the exact route, facility, service or hotel, which may vary. Hotel locations on maps are a guide only as maps are not to scale. Hotel ratings are those suggested by relevant local authorities or our representative and may vary from Tourist Office ratings.

**Costs not Included**
Costs of passports or visas, meals other than those specified in the itinerary, gratuities (unless stated in tour packages), excess baggage charges, personal items such as phone calls, laundry, airport taxes (where not specified to be included in the package) and insurance.

**GENERAL INFORMATION**

**Goods and Services Tax**
All goods and services offered for sale within this brochure are exempt from Australian Goods and Services Tax as the goods and services are provided outside Australia. However, for goods and services and other items connected with Australia, Goods and Services Tax will apply. This is subject to change at any time should legislation be enacted affecting the current treatment of the Australian Goods and Services Tax upon the goods and services provided.

**Health and Immigration**
Passengers should familiarise themselves with any health or visa requirement that may be applicable in the areas they intend visiting, and they shall be responsible for all exit, entry, health and other documents required by laws, regulations, orders, demands or requirements of the countries visited or transited. Each person (including infants) requires a valid passport. Kindly note that passport and visa requirements are not Explore Holidays' responsibility or that of your Agent and Explore Holidays is not liable for any loss or expense due to a passenger's failure to comply with the above. Visas may take several weeks to process. Passports must have at least 6 months' validity from the date of your return to Australia.

**Travel Insurance**
Travel Insurance is strongly recommended to cover you against loss of deposit or final monies paid, because of unavoidable cancellation due to illness or other causes, personal baggage loss, medical expenses etc.

**Responsibilities**
The TravelSpirit Group Limited trading as Explore Holidays (ACN 083 012 051) itself or through entities that are related or affiliated to it (all of whom are included in the expressions "Explore Holidays" or the "Operator" in this brochure) provide the service of selling holidays/tours and ancillary services such as bookings, arrangements and ticketing. The Operator does not itself provide the transport, accommodation, meals or other facilities described in this brochure (collectively the "services") that may be received by any person taking advantage thereof, all of which are provided by air carriers, land carriers, cruise operators, hoteliers or other service providers as principal. Explore Holidays agrees to make the reservations with the principals offering the services described in this brochure on the terms and conditions set out in this brochure. All coupons, exchange orders, contracts, tickets or vouchers issued by Explore Holidays (collectively "vouchers") are issued subject to all tariffs, terms and conditions contained in the contracts in use by the principals when used and constitute the sole contract between the principal and any person taking advantage of the services. Acceptance of such contracts constitutes acceptance of the foregoing.
Explore Holidays is responsible only for the services it provides and it accepts no responsibility for any loss or injury to persons or property caused by any act or omission, whether negligent or otherwise, on the part of any principal providing any services to any person taking advantage thereof, including but not limited to any loss or damage in respect of luggage or other property or inconvenience in respect of the handling thereof nor for any dissatisfaction with the properties or services provided by the principals. Explore Holidays is not liable in contract or tort for any injury, damage, loss, delay, additional expense or inconvenience caused directly or indirectly by force majeure or other events which are beyond the control of Explore Holidays or are not preventable including, without limitation, the acts or omissions of any person taking advantage of the services, dangers incident to the air or sea, delays, change of or alteration in any aircraft, itinerary, schedule or other travel service, illness, injury, strikes, war whether declared or not, failure of equipment, civil disturbance, medical or customs regulations, quarantines, floods, severe weather, acts of God, acts of government or other authority de jure or de facto or other disturbance of whatsoever nature, thefts, pilferage, improper or insufficient passport, visa or other documentation or anything else that interferes with, alters or adds to the cost of the services requested or booked. The foregoing exclusions of liability are subject to all Australian and State laws, such as the Trade Practices Act and Fair Trading legislation which prohibits the exclusion of certain liability, but remain effective to the full extent permitted by such laws. Explore Holidays will take due care to ensure the services provided by the principals are as described in this brochure subject to the qualifications and exceptions stated, but accepts liability for and only to the extent that loss or damage results directly from its own negligence or that of its employees. The making of a booking constitutes acceptance by all persons taking advantage of the services described in this brochure that the terms and conditions contained in this brochure constitute the entire agreement between them and Explore Holidays and that the agreement only be varied by an officer of Explore Holidays in writing.

**Consumer Protection**
The TravelSpirit Group Limited trading as Explore Holidays holds a Travel Agents Licence (No. 2TA4825), is a member of the Travel Compensation Fund and is a member of the Australian Federation of Travel Agents ("AFTA").

**Consumer Claims**
In the unlikely event you might experience a problem, you should immediately contact the company responsible for the provision of that service (transfer/hotel/tour etc) whose number will be printed on your voucher. If you are not satisfied with that response and should you wish to make a claim, your claim should be made in writing to the Travel Agent who made your booking no later than 30 days after your return to Australia. Explore Holidays cannot be held responsible for delays or rejection of claims by principals if your claim is not made promptly.

**New South Wales Law**
The agreement constituted by the terms and conditions contained in this brochure are governed by the laws of New South Wales, Australia.

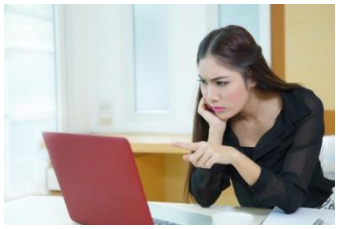
**Validity**
This programme is valid from 01 November 2006-
31 October 2007 and supersedes Explore Britain & Ireland 2006.

**Important Booking Conditions**
(a) All Sightseeing Tours featured in Explore Britain & Ireland 2007 should be booked together with one or more nights' accommodation in the same city. However, if this is not possible, a service fee of $20 per city applies.
(b) BritRail Passes, Eurostar, Heritage Passes, London Sightseeing Passes, London Travelcard, London Theatre Tickets and Heathrow Express should be booked in conjunction with at least one night's accommodation, or other land product, excluding products listed in this notice. However, if this is not possible, a service fee of $20 per booking applies.
(c) Transfers, where featured, can only be booked in conjunction with accommodation in the same city, at the same time, confirmed by Explore Holidays.

## Product or service provider terms and conditions

Individual product or service providers will often have a set of terms and conditions relating to their particular product or service.

These will cover, among other items:



- Pricing policy
- Payment conditions
- Inclusions
- Exclusions
- Any restrictions or limitations.

As can be seen in this section there are many terms and conditions provided by various organisations involved in the travel booking process.

Naturally the extent and finer details or terms and conditions may seem overwhelming or not anticipated by the end user. Therefore the role of travel agents in ensuring clients understand them is a vital aspect of providing quotations.




***Activity 14***

***Identify terms and conditions based on Activity 9***

You are required to identify the different terms and conditions that apply to the travel request identified in Activity 9.

This should be based on terms and conditions provided by:



- The travel agent themselves
- Suppliers
- The individual product or service provider.


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# 3.6 Prepare draft itinerary for packages

## Introduction

Now that all the vital information relating to products and services required for inclusion in a quotation have been compiled, it is now time to prepare:

- A quotation
- Itinerary.

There are many and varied formats used by travel agents for the provision of quotations and itineraries.

Today, most are provided using some form of pro-forma document which contains standard text and where allowance is made to personalise quotations and itineraries by inserting appropriate details.

## Prepare general quotation details

General information normally contained in a quotation includes, but not limited to:

- Date of quotation and reference number (if applicable)
- Clients name
- Phone contacts and fax (if applicable)
- Email address
- Address
- Month of travel
- Length of travel and class of travel
- Flight details
- Tours
- Accommodation
- Transfers
- Inclusions and exclusions
- Insurance details
- Payment requirements and cancellation fees
- Conditions of the quote
- Deposits required
- Service fees
- Expiry date of the quotation
- General conditions and rules.



## Prepare specific quotation details

Depending on the type, nature and inclusions of packages, specific information may relate to:

**Flights**



- Airline details
- Destinations and routings
- Class of travel
- Departure and return dates – remember to include the year
- Fare validity – for sale and for travel dates
- Air fare per person
- Taxes per person (always state that these are subject to change).

**Accommodation**



- Name of accommodation and location
- Room type and bedding configurations
- Check-in and check-out dates
- Total number of nights
- Any extras or inclusions such as meals, transfers etc.
- Cost per person per night and total amount for the stay.

**Car hire/Rentals**

- Name of company they are using – Avis, Budget, Hertz etc.
- Vehicle group or type – compact, midsize, group C etc.
- Transmission – manual or automatic
- Pick up and drop off dates, times and location
- Rate – if paying direct
- Rental Inclusions – mileage, additional drivers, insurances, taxes
- Any additional local payments for additional services e.g. GPS.

**Cruises**



- Name of the cruise line or company
- Name of the ship
- Name of cruise, including code
- Number of days or nights
- Departure date, time and location
- Return date, arrival time and location
- Cabin type and deck location.


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**Tours**

- Tour company name
- Tour name, code and duration
- Departure date, time and location/city
- Arrival date, time and location/city
- Rooming details – single, twin, triple
- Inclusions.



**Transfers**

- Date, time and location of transfers
- Type of transfer – seat in coach, private transfers, limousine etc.

**Insurance**

- Company used
- Policy type and length of policy
- Type of cover
- Reference to PDS (Product Disclosure Statement).

**Example of a standard pro-forma document for flights**

***<Agent Letterhead>***

*<insert date>*

*<insert name/s>*

*<insert address>*

*Dear <insert name/s>,*

*Further to our telephone conversation, I have pleasure in providing the following quotation for your trip to*

*<insert destination> in <insert date>.*

*<u>Costs</u>*

*Airfare: $<insert price> per person*

*Taxes: $<insert price> per person*

*Total: $<insert price> per person*

*In order to secure these flights, the air tickets must be issued by no later than <insert date> failing which the flights will be automatically cancelled by the airline and we will have to be re-book and re-quote the airfares.*

*<u>Payment</u>*

*Payment must therefore be received by no later than <insert date>*

*Credit card payments are subject to the following surcharges:*

*1% for Visa and MasterCard*

*2.5% for Diners Club*

*3.5% for American Express*

*Direct deposits to be paid into the <insert detail> Bank as follows:*

*Name of Travel Agent Account: <insert detail>*

*Branch: <insert detail>*

*BSB Number: <insert detail>*

*Account Number: <insert detail>*

*Please include the quote number and the lead passenger's surname and notify us of the direct deposit by telephone call or email to:*

*<insert email address and telephone detail>*

*<u>Flight details</u>*

*Please ensure that the first name and spelling of your surname are as they appear in your passports as alterations are costly. We are holding your provisional booking under the names of:*

*<insert names>*

*Please let me know if there are any special meal requests in relation to the flight booking and any preference in terms of seating on the aircraft.*

*I am provisionally holding the following flights:*

*Wed 28 Apr Depart: Melbourne 1550 hours SQ228*

*Wed 28 Apr Arrive: Singapore 2140 hours Singapore Airlines*

*Wed 28 Jul Depart: Singapore 0955 hours SQ217*

*Wed 28 Jul Arrive: Melbourne 1915 hours Singapore Airlines*

*If you are a member of a frequent flyer club, please provide your member number so that these may be added to your booking.*

*Once the air tickets have been issued, cancellation and/or any changes and/or amendments to the booking will incur fees.*

*<u>Travel insurance</u>*

*Travel insurance is therefore strongly recommended and I am happy to provide you with further detail in relation to travel insurance. The premium payable is primarily determined by the destination, the level of cover required and your age. Once you have confirmed your booking, I will provide you with further information in relation to travel insurance.*


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*<u>Visa and passport requirements</u>*

*Visa and Passports: <insert requirements – if applicable>*

*In the meantime, if you have any questions, please call me on <insert agent contact details>.*

*Kind regards,*

*<insert consultant name>*

*Travel Consultant*

*"Without a Travel Agent, You're are on your own"*



Depending on the system used, electronically generated quotations will all look different.

The basics however remain the same.

Here is an example of what such a document may look like. This quotation is for airfares, hotel accommodation and insurance.

**Travel Agent Details**

PROPOSAL

Quote Date: 13-12-20XX Consultant: Super Sally PO/Group Code:
Quote No: 10275-00041760 Email: superdupertravel@bigpond.com

Charged to:
Salimeh Jones
9 Pickersgill Avenue
Cherry Orchards, Victoria 3001

Lead Passenger: JONES/SALIMEHMS
Other Passengers: BROWN/HILMEMR

| Details | Qty | PP Price | Taxes | Inc. Total |
|---|---|---|---|---|
| Return airfares Melbourne to Hawaii<br>Depart Melbourne 27 Dec 09<br>10 nights Honolulu<br>6 nights Maui<br>Arrive Melbourne 13 Jan 10 | 2 | $1,278.00 | $554.00 | $3,664.00 |
| MOANA SURFRIDER<br>Ocean view room<br>10 nights in 27 Dec – out 06 Jan<br>No meals | 1 | $2,500.00 | $0.00 | $2,500.00 |
| Comprehensive Insurance 12 Days Plan A | 1 | $420.00 | $0.00 | $420.00 |
| **TOTAL** | | | | **$6,584.00** |

**Conditions**

Quote Condition: Please note that this is a quote only and no booking has been made. The quoted price is subject to change anytime.

**Comments**

This quote is valid for 7 days from date of issue

*"Without a Travel Agent, You're on your own"*


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## Prepare itinerary

The itinerary describes the traveller's route and direction of travel. It lists travel arrangements in the date of order that they are taken, and often lists them day by day. All of the places visited by the traveller are included.

This itinerary is provided with a quotation.



The itinerary describes the duration of the trip. Dates are in included in the itinerary, from the first day of arrangements to the last day. It also describes in sequence specific travel and tourism industry products used.

The itinerary will detail, in chronological order:

- Destinations
- Day destinations
- Attractions, tours and sight-seeing
- Arranged activities
- Times
- Transport
- Transfers
- Accommodation
- Meals.






***Prepare quotation and itinerary based on Activity 9***

***Activity 15***

You are required to prepare the following documents based on the travel request identified in Activity 9:

- Quotation
- Itinerary.



# 3.7 Prepare sales monitoring arrangements for packages

## Introduction

Analysing and monitoring sales regularly is an important aspect of any management role. By analysing sales performance, management can see clearly the direction in which our sales are headed, what has been successful and how we can adapt to increase the sales of specific packages and packages in general.

We can also conduct comparative studies to make informed decisions on how to improve our sales performance further.

## Preparing to monitor sales

Before the actual monitoring of sales performance takes place there are a number of activities that need to take place.

This may include:

- Establishing facilities to record enquiries in relation to packages
- Establishing internal systems to record package sales, including location of sale, seller, commissions and options selected
- Arranging for sales data to be forwarded from related businesses.



## Sales monitoring activities

Monitoring sales activities may include:

- Evaluating the results of different sales activities with reference to the nominated key performance indicators and sales objectives established by the organisation
- Identifying the sales turnover achieved by our sales team
- Track the performance of our sales team and develop appropriate strategies to help them perform better
- Evaluating the sales performance of individuals in the organisation
- Determine trends in sales and consumer preferences
- Distinguish between strong and weak products / services
- Better understand the performance of our products and services and determine how to exploit their strengths and enhance their weaknesses.
- Evaluating the success of different packages advertised to clients
- Identifying satisfaction level of clients who have undertaken packages prepared by the organisation
- Identifying innovative package suggestions
- Make better sales forecast and set more realistic sales targets in future.




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## Generic sales evaluation questions

Generic questions to be answered during evaluation may include:



- Did we meet our objectives?
- Did we get the response from the intended audience we were aiming to achieve?
- What aspects of the promotion worked and why?
- What aspects of the promotion didn't work and why?
- What customer feedback was received?
- Did we successfully cater for the demand we created?
- Are the existing objectives relevant or should be refine or create new objectives.

## Sales evaluation activities

Specific activities that may be part of the evaluation process include:



- Interviews with staff and customers
- Comparison of actual sales or revenue statistics with expected or target figures
- Analysis of data collected – such as databases, customer feedback and market research data
- Review of the budget – to determine whether or not the promotion came in on, under or over budget
- Consideration of ancillary benefits and problems that arose. Some promotions generate unanticipated spin-off benefits such as extra sales, higher levels of customer traffic, more media exposure that expected etc.
- In addition some present un-anticipated problems such as disgruntled regular customers unhappy with the changes brought about by the promotion or lost opportunity cost. For example if you run Promotion A, you automatically lose out on the potential that attaches to running promotion B.

## Determining what data to collect

The first step to analysing and monitoring sales is to determine what data to collect. There are generally two types of data that you may collect and use for analysing sales.

**Quantitative data**



- Actual sales generated
- Number of different packages sold
- Sales of specific tourism products and services
- Number of contacts or prospects
- Number / Percentage of bookings in relation to sales
- Performance of different market segments
- Sales mix.

**Qualitative data**



- Feedback from clients or colleagues
- Booking patterns
- Client satisfaction levels
- Effectiveness of sales staff in prospecting new clients.

To have accurate and useful information on sales performance, you should make use of both quantitative and qualitative data. However, quantitative data is often preferred because it is expressed in numbers and is measurable, and it allows unbiased evaluation of sales performance using statistical procedures.



On the other hand, qualitative data being only observable and not measurable is considered to be subject to biased interpretation, as it depends on people's opinions, knowledge and assumptions. Hence, qualitative data is not widely used. But qualitative data can sometimes tell you things and quantitative data cannot. For example, qualitative data may reveal why your sales techniques are working or not working, or the reasons why clients are or not buying your organisation's products and/or services.

Take note that the type of data to collect will depend on the type of information you want to know and have. It will also depend on the resources you have for collecting the desired data.

Required sales data is usually collected and reported by the sales staff or sales support team, and the data is normally input / recorded into a sales management system or any related database software.


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## *Evaluating sales activities*

## *Activity 16*

You are required to identify how you evaluate the success of your organisation's sales activities if you were the manager of a tourism organisation.



| WHAT WOULD YOU EVALUATE? | HOW OFTEN WOULD YOU EVALUATE? | HOW WOULD YOU EVALUATE? |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

# 3.8 Plan marketing activities for packages

## Introduction



As in any organisation, it is important for a travel organisation to plan marketing and sales activities to help promote and sell packages. The purpose of marketing and sales activities will differ but always aimed at meeting specific marketing objectives the organisation has set to guide the direction of the organisation's activities in the future.

This section will explore the different marketing and sales activities that can be used by a travel and tourism organisation to promote their business, increase sales and improve the overall performance of the organisation.

## Marketing planning activities

Activities associated with planning for marketing activities include:

- Identify marketing objectives
- Identify marketing and sales activities
- Training sales staff in relation to the packages
- Designing client feedback tools.

## Identify marketing objectives

Whilst each organisation will have their own objectives, in line with the overall business plan, examples of travel and tourism marketing objectives may include:

- To reinforce, continue or extend previous promotions of an existing packages
- To introduce a new package to the marketplace
- To notify customers that an existing package has been revised and altered in some way
- To meet direct competition
- To resurrect flagging sales
- To support a promotion or sale
- To build a larger customer database
- To fill an empty space in the promotion calendar or on the floor
- To improve profitability
- To capture a bigger market share
- To achieve a profit of X %
- To generate new clients
- Increased brand awareness in the market place
- Reinforcing or cementing success of organisation.




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## Identify marketing and sales activities

There are many ways in which a travel and tourism business can promote existing or new packages to its intended audience. Most organisations use a combination of promotional methods, which collectively known as the ‘promotional mix.

### *The promotional mix*

“Promotion is persuasive communication, directed to its target audience. Specifically, promotion involves communicating information between seller and potential buyer in order to influence attitudes and behaviour.”

The promotional mix is now usually referred to as the marketing communications mix, which is more precise because the purpose of communication to customers is not always to promote or persuade. Often the purpose of the communication is to make people aware, to inform or to reinforce an already promoted aspect of the product.

### *Promotional methods*

The main types of promotional methods are:

- Personal selling
- Sales promotions
- Advertising
- Publicity
- Sponsorship
- Public relations
- Newsletters
- Special Events
- Community Relations
- Media Releases
- On-site tour
- Social media activities.




These promotional methods will be explained in more detail in this section.

## Personal selling

In the tourism industry, every member of staff is perceived as a reflection of that company and a reflection of the organisation's attitudes toward its customers. The individual's experience with the organisation and its people is the strongest potential influencer as to whether they will make a travel purchase.

Even though special promotional offers may attract new customers or remind older customers that you are still around, customer retention will be determined by staff and their effectiveness as personal sales people.

## Sales promotions

Types of sales promotion include:

- Samples
- Contests
- In store displays
- Trade shows/exhibitions
- Point-of-purchase promotions
- Banners and streamers
- Sponsored events
- Discounts and offers.



## Advertising

Advertising is the main form of mass communication. Advertising is any paid form of non-personal presentation of ideas, goods or services by an identified sponsor.

Communicating with large numbers of potential customers at the same time can be less expensive and more flexible than personal selling, particularly when the target market is large and scattered.

Advertising can include paid content via:

- Television
- Radio
- Newspapers
- Magazines and journals
- Newsletters
- Internet.




## Publicity

While advertising must be paid for, another form of mass communication, publicity is free. "Publicity is any form of unpaid non-personal presentation of ideas, goods and services" Of course publicity people themselves are paid for but the favourable attention they draw to the company or an event without attracting media costs is not.


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## Sponsorship

Initially classified as one of the sales promotions tools, sponsorship is fast becoming a promotional method in its own right. It is crossing the boundaries between public relations and publicity and can take many forms in order to achieve different objectives.

It is defined as " An investment of cash or kind in a person, activity, event or sport in exchange for access to the commercial potential of that activity, event or sport." Sponsorship comes in many forms including:

- Sports sponsorship
- Arts sponsorship
- Broadcast sponsorship - where the company supports a particular program in exchange for announcement on the program or the rights to be associated with its presentation
- Cause sponsorship - where a company contributes to a known cause, including environmental protection. However there can still be commercial objectives. For example, being seen as a good corporate citizen could in time generate greater consumer goodwill and enhance profits.



Ideally, sponsorship enables both parties to benefit but contracts are difficult to establish and there are a number of risks attached to this type of investment.

## Public relations

Public relations involves the building of favourable relations for organisations and products with its key publics through the use of a variety of communications channels and tools.

It looks at all activities aimed at bringing the attention of the organisation and its offering to members of the media, to generate media coverage.

## Newsletters

Marketers who have captured names and addresses of customers and potential customers can use a newsletter for regular contact with their targeted audience. Marketers using newsletters strive to provide content of interest to customers as well as information on products and promotions. Effective newsletters are sought out by and well received by interested audiences.

## Special Events

Special events can be designed for a variety of purposes including, but certainly not limited to:

- Holding a grand opening
- Promoting new packages
- Having a themed activity
- Rewarding specific target audiences.



It is essential that any event organised conveys the correct message and image to the target audience.

## Community Relations

For many companies fostering good relations with key audiences includes building strong relationships with their regional community.

By organising or participating in local events or projects of importance, it helps to demonstrate it is not only an active member of the community but wants to see the community as a whole prosper and develop.

Given that a hospitality organisation in a rural area may employ large numbers of people from within the local community, any positive impacts may have flow on benefits for both the organisation and the staff members themselves.

## Media releases

A media release is an article, story or piece of information prepared by the organisation to inform media about something that is newsworthy and they may be interested in. It helps to assist them in writing the release by providing relevant and accurate information in an easy to use format.

**Topics for media releases**

Whilst the list of possible topics may be endless, they can include:

- New packages
- New promotions
- Experiences from previous customers who have undertaken packages
- Testimonials from customers
- Current news and happenings
- Industry trends, information or statistics
- Unique aspects of the organisation
- Staff movements, achievements and endeavours
- Community involvement
- Awards, prizes and achievements
- Testimonials from customers.




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## Onsite- tours

On-site tours will mainly be used for local tours or aimed at travel planners in a company.

**Purpose of an on-site tour**

The purpose of on on-site tour is to give the media a chance to

- 'Experience' what the organisation has to offer from a firsthand account
- Get a visual understanding of specific aspects of the organisation
- Improve their understanding which can make their reporting easier
- Provide an opportunity to see that any information presented in a presentation is a true and accurate reflection of what takes place.

**Steps when preparing an on-site tour**

There are a number of activities to consider when arranging an on-site tour including:



- Time allocated for the entire tour
- Locations to be visited on the tour
- Distance and method of transportation between each location
- Weather – in the event of rain, umbrellas may need to be provided if participants are to go outdoors
- What activities or demonstrations are to take place at each location
- Notifying people at each location of what is expected of them, if anything
- Any additional documents or gifts to be provided at each location.

## Social media



Social media is the social interaction among people in which they create, share or exchange information and ideas in virtual communities and networks.

Social media technologies take on many different forms including magazines, Internet forums, weblogs, social blogs, micro blogging, wikis, social networks, podcasts, photographs or pictures, video, rating and social bookmarking. Technologies include blogging, picture-sharing, vlogs, wall-posting, music-sharing, crowdsourcing and voice over IP, to name a few.

Social media marketing is the process where hospitality, event and tourism operators, utilise a wide range of sites like Facebook, Twitter and Tumblr to promote:

- Their overall brand
- Products and services provided
- Generate interest in a company
- Highlight specific promotions or products.

Because traffic from social media sites is usually highly targeted, the targeted audience of social media campaigns are more likely to turn into customers and buyers than visitors who find your site via a search engine query or by other traditional marketing avenues.

Social media invites an interactive two-way conversation between the organisation and the desired audience. If organisations ignore the second part of the equation, then the marketing effort is most likely doomed to fail.

In this sense, whilst the avenues and activities associated with traditional marketing and social media may differ, the marketing principles and the need to focus on the intended audiences needs and wants remain the same.

### *Types of social media platforms*

This section will explore the various types of social media platforms which can be used as part of a social media campaign.

Each platform serves a specific purpose and therefore must be carefully considered before selection to ensure its appropriateness in your organisation reaching their goals.

**Social networks**

Social network sites are social media sites allowing users to connect and share with other people who have similar interests and backgrounds. Whilst Facebook is the most popular example of a social network website, there are many other good social networks as well.

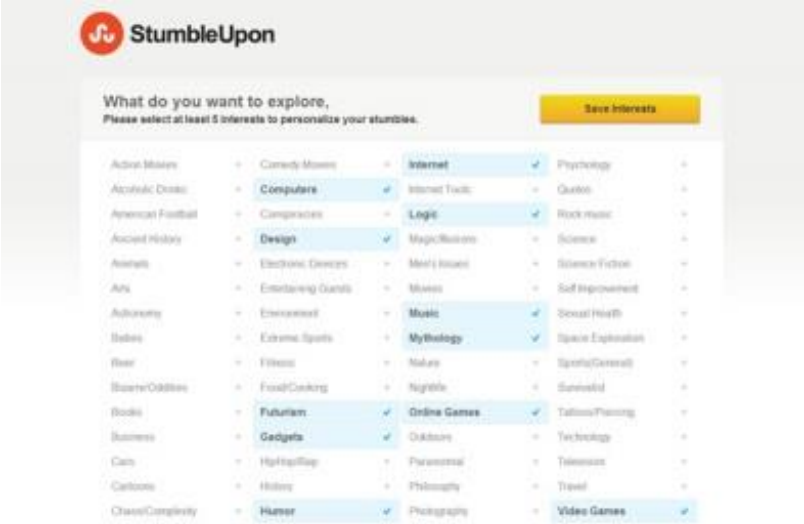




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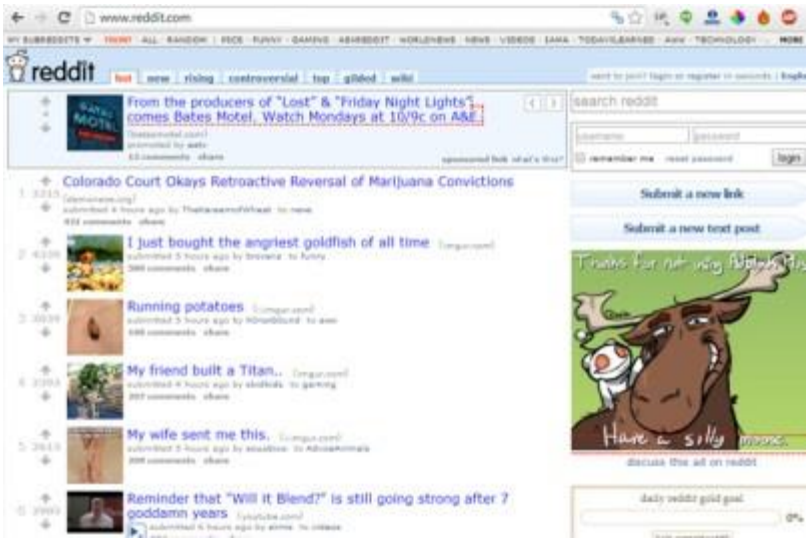
### Bookmarking sites

Bookmarking sites allow users to save and organize links to any number of online resources and websites. A great feature of these services is the ability for the user to “tag” links, which makes them easier to search and share with their intended audience and followers. StumbleUpon is a popular example of a bookmarking site.




### Social news

Social news sites allow companies and individual users to post news links and other items of interest or importance to outside articles. Users then vote on specific items with the items with the highest number of votes are most prominently displayed. A good example of a social news site is Reddit.



### Media sharing

Media sharing websites allow users to share different types of media. This commonly includes video and pictures. Many of these sites offer social features, enabling profiles to be created and allowing people to comment on the uploaded images. YouTube is the most well-known media sharing site in the world.




### Micro blogging

These sites allow the users to submit short written comments, which can include links to:

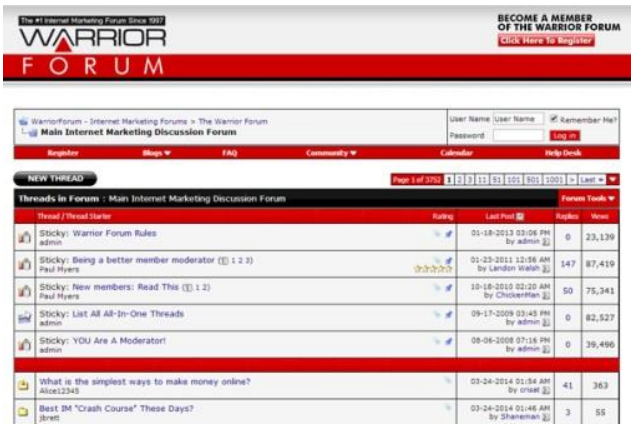
- Product and service sites
- Other social media sites.

These are then posted on the 'walls' of everyone who has subscribed to that user's account. The most commonly used micro blogging website is Twitter.




### Blog comments and forums

An online forum is a site that facilitates users to engage in conversations by posting and responding to community messages. A blog comment site is the same thing except a little more focused. The comments are usually centred on the specific subject of the attached blog. Whilst Google has a popular blogging site called 'Blogger' there are many niche-based blogging sites aimed at specific topics and audiences.





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## *Activity 17*

## *Identify promotional methods used to sell new packages in your region*

You are required to identify the different types of promotional methods you would use if you were to promote new tourism packages to potential audiences.



| TYPE OF PROMOTIONAL METHOD | REASONS FOR SELECTING THIS METHOD | ACTIVITIES ASSOCIATED WITH THIS PROMOTIONAL METHOD |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

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## Training sales staff in relation to the packages



Training and development of staff is a primary requirement for all business development. As the direct provider of services to customers, customers must not only have the knowledge and skills to be able to do their job adequately, they must also have support and guidance from management.

Whilst it is important to use a variety of promotional activities to promote new packages to existing and potential clients, in most cases the purpose of these activities are to get the desired audience to contact staff to find out more information and to make a purchase.

It is important that this opportunity is not lost, through staff having insufficient knowledge of:

- Types of packages
- Tourism products and services within the packages
- Promotions on offer regarding the packages
- Promotional and selling techniques to sell the packages.

Any training activity must serve a purpose. The content of the training should be specific to the packages and how to tailor them to the needs of the different target market segments.

Normally training events are arranged when:

- Customer service deficiencies exist which need to be addressed
- New staff require training
- New packages are introduced
- New package products or services components are introduced
- Retraining is required.

Whilst training events should take place for traditional reasons that are mentioned above, it should be an ongoing activity that involves support, encouragement and coaching.



In choosing training activities, managers should take into account the practical, complex and multi-disciplinary nature of the training topics, as well as their participant's prior knowledge, learning styles and abilities.


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### *Types of training events*

Whilst training events are traditionally focused towards formal training, they can be classified as any activity that enables staff to improve their service delivery in the selling of tourism packages.

Training events include any activity that will result in learner attainment or progress towards identified workplace attitudes, skills or knowledge.

The different types of training events that can be used include, but not limited to:

- Meetings
- Conferences
- Demonstration
- Presentations
- Group Discussions
- Role Play
- Individual or group exercises
- Case Study
- Site Visits and familiarisation trips
- Meetings with industry associations
- Research Activities
- Qualifications and certified training programs
- Specialised programs
- Reading of brochures
- Discussions with suppliers
- Review of supplier DVD's, brochures or other promotional materials
- Discussions with clients or staff who have undertaken packages.



## *Identify training activities*

## *Activity 18*



You are required to identify three training activities you can use to help staff understand, promote and sell tourism packages to clients.

| TRAINING METHOD | TRAINING TOPICS |
|---|---|
| | |
| | |
| | |


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## Designing client feedback tools

There are a variety of methods management and staff can use to collect feedback from clients.




Regardless of the method used to collect information, it is vital:

- The form is designed to gather important information about all aspects of service delivery
- The format is easy to use for the customer
- The form is presented to the customer when it is going to cause the less inconvenience
- The customer is thanked for their feedback, whether in the form of a gift or other suitable reward.

### *Client comment cards*

These are traditionally given to clients after they have undertaken their travel experience, either by email or mail. They will normally focus on all aspects of the experience ranging from:



- Promotional material
- Service provided by organisational staff
- Aspects of the travel itself.

### *Online feedback*

This can include a 'Tell us what you think' facility or some other 'Customer Comment or Feedback' option.

Where this is used it is important someone checks this on a regular basis and responds to the complaint or feedback etc.: simply using an automatic response message is not enough.




***Research and create client feedback forms***

***Activity 19***

You are required to research and collect evidence of a:



- Client comment card
- An online feedback form.

You are then required to prepare your on client feedback form which includes opportunities for feedback in all areas you consider to be important to you.

# Work Projects

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

3.1 Please complete the following activities relating to this Performance Criteria:

- Activity 10

3.2 Please complete the following activities relating to this Performance Criteria:

- Activities 6,7,9,11

3.3 Please complete the following activities relating to this Performance Criteria:

- Activity 12

3.4 Please complete the following activities relating to this Performance Criteria:

- Activity 13

3.5 Please complete the following activities relating to this Performance Criteria:

- Activity 14

3.6 Please complete the following activities relating to this Performance Criteria:

- Activity 15

3.7 Please complete the following activities relating to this Performance Criteria:

- Activity 16

3.8 Please complete the following activities relating to this Performance Criteria:

- Activities 17,18,19


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# Summary

## Create packages of products and services

**Identify pre-planning requirements for packages**

- Documenting packaging information and quotation
- Methods to prepare package information
- Importance of recording accurate information
- Benefits of accurately recording information
- Planning package components
- Steps in creating packages.

**Determine components of individual packages**

- Destination attractions
- Destination facilities and services
- Accessibility of the destination
- Images and perceptions of the destination
- Inclusions and exclusions.

**Determine duration for packages**

- Duration factors determined by the client
- Duration factors determined by suppliers
- Duration factors determined by other influences
- Determine duration of packages.

**Calculate price points for packages**

- Activities associated with calculating costs of products and services
- Costing price point considerations
- Identifying direct costs
- Calculate mark-up net costs and commissions to determine a profitable selling price
- Identify organisational fees
- Accurately calculate any additional taxes, special fees and other charges
- Accurately calculate any required currency conversions
- Securing quotes and costs from suppliers
- Check all calculations against all product and service components.

**Develop terms and conditions for the packages**

- Types of terms and conditions
- Booking conditions
- Travel Agent Terms and Conditions
- Supplier terms and conditions
- Product or service provider terms and conditions.

**Prepare draft itinerary for packages**

- Prepare general quotation details
- Prepare specific quotation details
- Prepare itinerary.

**Prepare sales monitoring arrangements for packages**

- Preparing to monitor sales
- Sales monitoring activities
- Generic sales evaluation questions
- Sales evaluation activities
- Determining what data to collect.

**Plan marketing activities for packages**

- Marketing planning activities
- Identify marketing objectives
- Identify marketing and sales activities
- Personal selling
- Sales promotions
- Advertising
- Publicity
- Sponsorship
- Public relations
- Newsletters
- Special Events
- Community Relations
- Media Releases
- On-site tour
- Social media activities
- Training sales staff in relation to the packages
- Designing client feedback tools.


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# Presentation of written work

## 1. Introduction

It is important for students to present carefully prepared written work. Written presentation in industry must be professional in appearance and accurate in content. If students develop good writing skills whilst studying, they are able to easily transfer those skills to the workplace.

## 2. Style



Students should write in a style that is simple and concise. Short sentences and paragraphs are easier to read and understand. It helps to write a plan and at least one draft of the written work so that the final product will be well organised. The points presented will then follow a logical sequence and be relevant. Students should frequently refer to the question asked, to keep 'on track'. Teachers recognise and are critical of work that does not answer the question, or is 'padded' with irrelevant material. In summary, remember to:

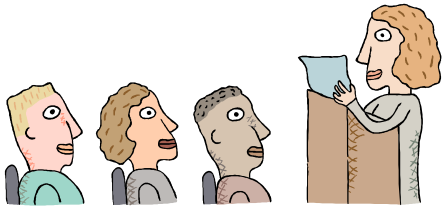
- Plan ahead
- Be clear and concise
- Answer the question
- Proofread the final draft.

## 3. Presenting Written Work

***Types of written work***

Students may be asked to write:

- Short and long reports
- Essays
- Records of interviews
- Questionnaires
- Business letters
- Resumes.



***Format***

All written work should be presented on A4 paper, single-sided with a left-hand margin. If work is word-processed, one-and-a-half or double spacing should be used. Handwritten work must be legible and should also be well spaced to allow for ease of reading. New paragraphs should not be indented but should be separated by a space. Pages must be numbered. If headings are also to be numbered, students should use a logical and sequential system of numbering.

### *Cover Sheet*

All written work should be submitted with a cover sheet stapled to the front that contains:

- The student's name and student number
- The name of the class/unit
- The due date of the work
- The title of the work
- The teacher's name
- A signed declaration that the work does not involve plagiarism.

### *Keeping a Copy*

Students must keep a copy of the written work in case it is lost. This rarely happens but it can be disastrous if a copy has not been kept.

### *Inclusive language*

This means language that includes every section of the population. For instance, if a student were to write 'A nurse is responsible for the patients in her care at all times' it would be implying that all nurses are female and would be excluding male nurses.

Examples of appropriate language are shown on the right:

| | |
|---|---|
| Mankind | *Humankind* |
| Barman/maid | *Bar attendant* |
| Host/hostess | *Host* |
| Waiter/waitress | *Waiter or waiting staff* |


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# Recommended reading

Baldacchino, G; 2006 (1st edition); *Global Tourism and Informal Labour Relations: The Small Scale Syndrome at Work (Employment and Work Relations in Context)*; Routledge

Bhatia, A; 2012 (1st edition); *The Business of Travel Agency & Tour Operations Management*; Sterling Publishers

Booth, Wayne; 2008 (3rd edition); *The Craft of Research*; University Of Chicago Press

Buhalis, Dimitrios; 2003 (1st edition); eTourism: Information technology for strategic tourism management; Prentice Hall

Conrady, Roland & Buck, Martin; 2011 (1st edition); *Trends and Issues in Global Tourism*; Spinger Publishers

Cook, Roy 2009 (4th Edition);*The Business of Travel*; Prentice Hall

Goeldner Charles R. 2011 (12th edition); *Tourism: Principles, Practices, Philosophies*; Wiley

Hall, Colin Michael; 2008 (1st edition); *Tourism Planning: Policies, Processes and Relationships*; Pearson/Prentice Hall

Lennon, John; 2003 (1st edition); *Tourism Statistics: International Perspectives and Current Issues*; Cengage Learning EMEA;

Mason, Peter; 2008 (2nd edition); T*ourism Impacts, Planning and Management*; Taylor & Francis

Molz , Jennie Germann ; 2012 (1st edition); *Travel Connections: Tourism, Technology and Togetherness in a Mobile World*; Routledge

Morris, Karen 2007 (7th edition); *Hotel, Restaurant, and Travel Law*; Delmar Cengage Learning

Rastogi, A; 2007 (1st edition); *Travel Agency Operations*; Aman Publication

Sharma, Lalita; 2010 (1st edition); *Travel Agency and Tour Operation*: *Concepts and Principles*; Centrum Press

Sharpley, Richard, 2002 (1st edition); *Tourism and development – concepts and issues*; Channel view publications

Smith, Maureen A. & Schloss, Patrick J; 1999 (1st edition); *Conducting Research*; Prentice Hall

Walker, John R and Walker,Josielyn; 2010 (1st edition); *Tourism: Concepts and Practices* , Prentice Hall

Yeoman, Ian; 2008 (1st edition); *Tomorrow's Tourist – Scenarios and Trends*; Future Foundation

Destination information can be sourced through:

- The series of ‘Lonely Planet’ books as applicable to individual countries
- Various city guides
- Trip Advisors.

Online Travel Guides:

- Arrivalguides.com
- Concierge.com
- Fodor’s
- Frommers.com
- Let’s Go Travel Guides
- Lonely Planet
- Rough Guides
- Ruba
- Traveldk.com
- Trip Advisor
- Tripwolf
- Wikitravel
- Yahoo Travel.


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# Trainee evaluation sheet

## Source and package tourism products and services

The following statements are about the competency you have just completed.

| Please tick the appropriate box | Agree | Don't Know | Do Not Agree | Does Not Apply |
|---|---|---|---|---|
| There was too much in this competency to cover without rushing. | ☐ | ☐ | ☐ | ☐ |
| Most of the competency seemed relevant to me. | ☐ | ☐ | ☐ | ☐ |
| The competency was at the right level for me. | ☐ | ☐ | ☐ | ☐ |
| I got enough help from my trainer. | ☐ | ☐ | ☐ | ☐ |
| The amount of activities was sufficient. | ☐ | ☐ | ☐ | ☐ |
| The competency allowed me to use my own initiative. | ☐ | ☐ | ☐ | ☐ |
| My training was well-organised. | ☐ | ☐ | ☐ | ☐ |
| My trainer had time to answer my questions. | ☐ | ☐ | ☐ | ☐ |
| I understood how I was going to be assessed. | ☐ | ☐ | ☐ | ☐ |
| I was given enough time to practice. | ☐ | ☐ | ☐ | ☐ |
| My trainer feedback was useful. | ☐ | ☐ | ☐ | ☐ |
| Enough equipment was available and it worked well. | ☐ | ☐ | ☐ | ☐ |
| The activities were too hard for me. | ☐ | ☐ | ☐ | ☐ |

The best things about this unit were:

The worst things about this unit were:

The things you should change in this unit are:


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# Trainee self-assessment checklist

As an indicator to your Trainer/Assessor of your readiness for assessment in this unit please complete the following and hand to your Trainer/Assessor.

## Source and package tourism products and services

| | | Yes | No* |
|---|---|---|---|
| **Element 1: Describe the context for packages** | | | |
| 1.1 | Identify the clients for packages | ☐ | ☐ |
| 1.2 | Identify client requirements in relation to packages | ☐ | ☐ |
| 1.3 | Identify host enterprise requirements in relation to packages | ☐ | ☐ |
| 1.4 | Identify purposes of packages | ☐ | ☐ |
| 1.5 | Identify products and services for inclusion in packages | ☐ | ☐ |
| **Element 2: Source products and services for packages** | | | |
| 2.1 | Identify sources of information for products and services | ☐ | ☐ |
| 2.2 | Research information sources to obtain targeted information | ☐ | ☐ |
| 2.3 | Assess applicability of identified products and services to proposed packages | ☐ | ☐ |
| 2.4 | Select products and services for the package | ☐ | ☐ |
| **Element 3: Create packages of products and services** | | | |
| 3.1 | Identify pre-planning requirements for packages | ☐ | ☐ |
| 3.2 | Determine components of individual packages | ☐ | ☐ |
| 3.3 | Determine duration for packages | ☐ | ☐ |
| 3.4 | Calculate price points for packages | ☐ | ☐ |
| 3.5 | Develop terms and conditions for the packages | ☐ | ☐ |
| 3.6 | Prepare draft itinerary for packages | ☐ | ☐ |
| 3.7 | Prepare sales monitoring arrangements for packages | ☐ | ☐ |
| 3.8 | Plan marketing activities for packages | ☐ | ☐ |

**Statement by Trainee:**

I believe I am ready to be assessed on the following as indicated above:

**Signed:** _____ **Date:** _____

**Note:**

For all boxes where a **No*** is ticked, please provide details of the extra steps or work you need to do to become ready for assessment.


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William
Angliss
Institute
Specialist centre
for foods, tourism
& hospitality
asean
Australian
Aid

# Source and package tourism products and services

## D2.TCS.CL5.22
## D2.TTA.CL2.18

## Assessor Manual



Australian Aid

asean

William Angliss Institute

Specialist centre for foods, tourism & hospitality

# Source and package tourism products and services

## D2.TCS.CL5.22
## D2.TTA.CL2.18

## Assessor Manual

Australian Aid
asean
William Angliss Institute
Specialist centre for foods, tourism & hospitality

Project Base

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# Competency Based Assessment (CBA) – An Introduction for Assessors

Assessment is the process of identifying a participant's current knowledge, skills and attitudes sets against all elements of competency within a unit of competency.

### *Suggested Assessment Methods*

For each unit of competency a number of assessment tools have been identified including:

- Work Projects
- Oral Questions
- Written Questions
- Third Party Statements
- Observation Checklists.

Instructions and Evidence Recording Sheets have been identified in this Assessment Manual for use by Assessors.

### *Alternative Assessment Methods*

Whilst the above mentioned assessment methods are suggested assessment methods, the assessor may use an alternate method of assessment taking into account:

a) The nature of the unit

b) The strengths of participants

c) The number of participants in the class

d) Time required to complete assessments

e) Time dedicated to assessment

f) Equipment and resources required.

Alternate assessment methods include:

- Practical demonstrations
- Practical demonstrations in simulated work conditions
- Problem solving
- Portfolios of evidence
- Critical incident reports
- Journals
- Oral presentations
- Interviews
- Videos
- Visuals/slides/audiotapes

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- Case studies
- Log books
- Projects and Role plays
- Group projects
- Recognition of Prior Learning.

Whilst there is no specific instruction or evidence collection documents for all the alternative assessment methods, assessors can record competency in the 'Other' section within the 'Competency Recording Sheet'.

### *Selection of Assessment Methods*

Each assessor will determine the combination of Assessment Methods to be used to determine Competency for each Competency Unit on a student by student basis.

'Sufficient' evidence to support the 'Pass Competent'/'Not Yet Competent' decision must be captured.

In practice this means a minimum of 2 – 3 Assessment Methods for each candidate for each Competency Element is suggested.

At least one method should provide evidence of practical demonstration of competence.

The following assessment methods deemed to provide evidence of practical demonstration of competence include:

- Practical Work Projects
- Third Party Statement
- Observation Checklist.

### *Assessing Competency*

Competency based assessment does not award grades, but simply identifies if the participant has the knowledge, skills and attitudes to undertake the required task to the specified standard.

Therefore, when assessing competency, an assessor has two possible results that can be awarded:

- 'Pass Competent' (PC)
- 'Not Yet Competent' (NYC).

**Pass Competent (PC)**

If the participant is able to successfully answer or demonstrate what is required, to the expected standards of the performance criteria, they will be deemed as 'Pass Competent' (PC).

The assessor will award a 'Pass Competent' (PC) if they feel the participant has the necessary knowledge, skills and attitudes in all assessment tasks for a unit.

**Not Yet Competent' (NYC)**

If the participant is unable to answer or demonstrate competency to the desired standard, they will be deemed to be 'Not Yet Competent' (NYC).


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This does not mean the participant will need to complete all the assessment tasks again. The focus will be on the specific assessment tasks that were not performed to the expected standards.

The participant may be required to:

a) Undertake further training or instruction

b) Undertake the assessment task again until they are deemed to be 'Pass Competent'.

### *Regional Qualifications Framework and Skills Recognition System*

The 'Regional Qualifications Framework and Skills Recognition System', also known as the 'RQFSRS' is the overriding educational framework for the ASEAN region.

The purpose of this framework is to provide:

- A standardised teaching and assessment framework
- Mutual recognition of participant achievement across the ASEAN region. This includes achievement in individual Units of Competency or qualifications as a whole.

The role of the 'RQFSRS' is to provide, ensure and maintain 'quality assurance' across all countries and educational providers across the ASEAN region.

### *Recognition of Prior Learning (RPL)*

Recognition of Prior Learning is the process that gives current industry professionals who do not have a formal qualification, the opportunity to benchmark their extensive skills and experience against the standards set out in each unit of competency/subject.

This process is a learning and assessment pathway which encompasses:

- Recognition of Current Competencies (RCC)
- Skills auditing
- Gap analysis and training
- Credit transfer.

### *Code of Practice for Assessors*

This Code of Practice provides:

- Assessors with direction on the standard of practice expected of them
- Candidates with assurance of the standards of practice expected of assessors
- Employers with assurance of the standards maintained in the conduct of assessment.

The Code detailed below is based on the International Code of Ethics and Practice (The National Council for Measurement in Education [NCME]):

- The differing needs and requirements of the person being assessed, the local enterprise and/or industry are identified and handled with sensitivity
- Potential forms of conflict of interest in the assessment process and/or outcomes are identified and appropriate referrals are made, if necessary
- All forms of harassment are avoided throughout the planning, conducting, reviewing and reporting of the assessment outcomes

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- The rights of the candidate are protected during and after the assessment
- Personal and interpersonal factors that are not relevant to the assessment of competency must not influence the assessment outcomes
- The candidate is made aware of rights and process of appeal
- Evidence that is gathered during the assessment is verified for validity, reliability, authenticity, sufficiency and currency
- Assessment decisions are based on available evidence that can be produced and verified by another assessor
- Assessments are conducted within the boundaries of the assessment system policies and procedures
- Formal agreement is obtained from both the candidate and the assessor that the assessment was carried out in accordance with agreed procedures
- The candidate is informed of all assessment reporting processes prior to the assessment
- The candidate is informed of all known potential consequences of decisions arising from an assessment, prior to the assessment
- Confidentiality is maintained regarding assessment results
- The assessment results are used consistently with the purposes explained to the candidate
- Opportunities are created for technical assistance in planning, conducting and reviewing assessment procedures and outcomes.

## *Instructions and Checklist for Assessors*

### Instructions

General instructions for the assessment:

- Assessment should be conducted at a scheduled time that has been notified to the candidate
- Facilitators must ensure participants are made aware of the need to complete assessments and attend assessment sessions
- If a participant is unable to attend a scheduled session, they must make arrangements with the Assessor to undertake the assessment at an alternative time
- At the end of the assessment the Assessor must give feedback and advise the participant on their PC/NYC status
- Complete the relevant documentation and submit to the appropriate department.

### Preparation

- Gain familiarity with the Unit of Competency, Elements of Competency and the Performance Criteria expected
- Study details assessment documentation and requirements
- Brief candidate regarding all assessment criteria and requirements.

### Briefing Checklist

- Begin the assessment by implementing the following checklist and then invite the candidate to proceed with assessment.


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### *Checklist for Assessors*

| Prior to the assessment I have: | Tick (✓) | Remarks |
|---|---|---|
| Ensured the candidate is informed about the venue and schedule of assessment. | | |
| Received current copies of the performance criteria to be assessed, assessment plan, evidence gathering plan, assessment checklist, appeal form and the company's standard operating procedures (SOP). | | |
| Reviewed the performance criteria and evidence plan to ensure I clearly understood the instructions and the requirements of the assessment process. | | |
| Identified and accommodated any special needs of the candidate. | | |
| Checked the set-up and resources for the assessment. | | |
| **During the assessment I have:** | | |
| Introduced myself and confirmed identities of candidates. | | |
| Put candidates at ease by being friendly and helpful. | | |
| Explained to candidates the purpose, context and benefits of the assessment. | | |
| Ensured candidates understood the assessment process and all attendant procedures. | | |
| Provided candidates with an overview of performance criteria to be assessed. | | |
| Explained the results reporting procedure. | | |
| Encouraged candidates to seek clarifications if in doubt. | | |
| Asked candidates for feedback on the assessment. | | |
| Explained legal, safety and ethical issues, if applicable. | | |
| **After the assessment I have:** | | |
| Ensured candidate is given constructive feedback. | | |
| Completed and signed the assessment record. | | |
| Thanked candidate for participating in the assessment. | | |

## *Instructions for Recording Competency*

### Specifications for Recording Competency

The following specifications apply to the preparation of Evidence Gathering Plans:

- A Competency Recording Sheet must be prepared for each candidate to ensure and demonstrate all Performance Criteria and Competency Elements are appropriately assessed. This Sheet indicates how the Assessor will gather evidence during their assessment of each candidate
- This Competency Recording Sheet is located at the end of the Assessment Plan
- It is the overriding document to record competency
- The Assessor may vary the Competency Recording Sheet to accommodate practical and individual candidate and/or workplace needs
- Assessor must place a tick (✓) in the 'Assessment Method' columns to identify the methods of assessment to be used for each candidate
- Multiple Competency Elements/Performance Criteria may be assessed at the one time, where appropriate
- The assessor and participant should sign and date the Competency Recording Sheet, when all forms of evidence and assessment have been completed
- The assessor may provide and feedback or clarify questions which the participant may have in regards to the assessment grade or findings
- All documents used to capture evidence must be retained, and attached to the Competency Recording Sheet for each candidate for each Competency Unit.

## *Instructions for Different Assessment Methods*

### Specifications for Work Project Assessment

These guidelines concern the use of work projects.

The work projects identified in the Training Manuals involve a range of tasks, to be performed at the discretion of the Assessor.

Work project tasks can be completed through any form of assessment as identified in the Trainer and Trainee Manuals and stated at the start of this section.

Assessors should follow these guidelines:

- Review the Work Projects at the end of each 'Element of Competency' in the Trainee Manual to ensure you understand the content and what is expected
- Prepare sufficient resources for the completion of work activities including:
  - Time – whether in scheduled delivery hours or suggested time participants to spend outside of class hours
  - Resources – this may involve technical equipment, computer, internet access, stationery and other supplementary materials and documents
- Prepare assessment location (if done in class) making it conducive to assessment
- Explain Work Projects assessment to candidate, at the start of each Element of Competency. This ensures that participants are aware of what is expected and can collate information as delivery takes place


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- Assessors can use the following phrase as a guide (where an 'X' is identified, please input appropriate information):

  "At the end of each Element of Competency there are Work Projects which must be completed. These projects require different tasks that must be completed.

  These work projects are part of the formal assessment for the unit of competency titled X:

  - You are required to complete these activities:
    a) *Using the 'X' method of assessment*
    b) *At 'X' location*
    c) *You will have 'X time period' for this assessment*
  - You are required to compile information in a format that you feel is appropriate to the assessment
  - Do you have any questions about this assessment?"
- Commence Work Project assessment:
  - The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
  - Participants complete work projects in the most appropriate format
  - Participants must submit Work Project evidence to the assessor before the scheduled due date
- Assessor must assess the participant's evidence against the competency standards specified in each Element of Competency and their own understanding. The assessor can determine if the participant has provided evidence to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

### *Specifications for Oral Question Assessment*

These guidelines concern the use of oral questioning.

Assessors should follow these guidelines.

- Prepare Assessment Record for Oral Questioning. One record for each candidate:
  - Enter Student name
  - Enter Assessor name
  - Enter Location
- Familiarise self with Questions to be asked
- Prepare assessment location (table and chairs) making it conducive to assessment
- Explain Oral Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

  *"These oral questions are part of the formal assessment for the unit of competency titled X.*

  *There are X questions and you are required to answer all of them to the best of your ability and I will record whether or not you have answered correctly.*

*We have 60 minutes for this assessment.*

- I will give you feedback at the end of the assessment
- Do you have any questions about this assessment?"

- Commence Oral Questioning assessment:
  - Complete Assessment Record for the Oral Questioning by:
    a) Ticking PC or NYC, as appropriate
    b) Entering 'Remarks' as required
    c) Completing Oral Questioning within 60 minutes
- Complete Oral Questioning and provide feedback to candidate
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

### *Specifications for Written Question Assessment*

These guidelines concern the use of written questioning.

Assessors should follow these guidelines:

- Familiarise self with Questions and Answers provided
- Print and distribute copies of 'Written Questions' for participants. Ideally this should take place with adequate time for participants to answer all questions before the expected due date
- Explain Written Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

  "These written questions are part of the formal assessment for the unit of competency titled X.

  There are X questions and you are required to answer all of them to the best of your ability.

  You may refer to your subject materials, however where possible try to utilise your existing knowledge when answering questions.

  Where you are unsure of questions, please ask the Assessor for further instruction. This may be answering the question orally or asking the assessor to redefine the question.

  We have X time for this assessment:

  - The due date for completion of this assessment is X
  - On this date you must forward the completed questions to the assessor by X time on the date of X
  - Do you have any questions about this assessment?"

- The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
- Participants may record written answers (where possible)
- Participants must submit the written answers to the assessor before the scheduled due date


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- Assessor must assess the participant's written answers against the model answers provided as a guide, or their own understanding. The assessor can determine if the participant has answered the questions to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

### *Specifications for Observation Checklist*

These specifications apply to the use of the Observation Checklist in determining competency for candidates.

Only an approved assessor is authorised to complete the Observation Checklist.

The assessor is required to observe the participant, ideally in a simulated environment or their practical workplace setting and record their performance (or otherwise) of the competencies listed on the Observation Checklist for the Competency Unit.

To complete the Observation Checklist the Assessor must:

- Insert name of candidate
- Insert assessor name
- Insert identify of location where observations are being undertaken
- Insert date/s of observations – may be single date or multiple dates
- Place a tick in either the 'Yes' or 'No' box for each listed Performance Criteria to indicate the candidate has demonstrated/not demonstrated that skill
- Provide written (and verbal) feedback to candidate – as/if appropriate
- Sign and date the form
- Present form to candidate for them to sign and date
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Observation Checklist.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the participant.

### *Specifications for Third Party Statement*

These specifications relate to the use of a relevant workplace person to assist in determining competency for candidates.

The Third Party Statement is to be supplied by the assessor to a person in the workplace who supervises and/or works closely with the participant.

This may be their Supervisor, the venue manager, the Department Manager or similar.

The Third Party Statement asks the Supervisor to record what they believe to be the competencies of the participant based on their workplace experience of the participant. This experience may be gained through observation of their workplace performance, feedback from others, inspection of candidate's work etc.

A meeting must take place between the Assessor and the Third Party to explain and demonstrate the use of the Third Party Statement.

To complete the Third Party Verification Statement the Assessor must:

- Insert candidate name
- Insert name and contact details of the Third Party
- Tick the box to indicate the relationship of the Third Party to the candidate
- Present the partially completed form to the Third Party for them to finalise
- Collect the completed form from the Third Party
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Third Party Statement.

The Third Party must:

- Record their belief regarding candidate ability/competency as either:
  - Pass Competent = Yes
  - Not Yet Competent = No
  - Unsure about whether candidate is competent or not = Not Sure
- Meet briefly with the assessor to discuss and/or clarify the form.

This source of evidence combines with other forms of assessment to assist in determining the ‘Pass Competent’ or ‘Not Yet Competent’ decision for the candidate.

A separate Third Party Statement is required for each Competency Unit undertaken by the candidate.


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# Competency standard

| **UNIT TITLE:** SOURCE AND PACKAGE TOURISM PRODUCTS AND SERVICES | **NOMINAL HOURS:** 70 |
|---|---|
| **UNIT NUMBER:** D2.TCS.CL5.22 D2.TTA.CL2.18 | |
| **UNIT DESCRIPTOR:** This unit deals with skills and knowledge required to source and evaluate products and services for inclusion into packages for sale to individual and/or generic groups of clients. | |

| **ELEMENTS AND PERFORMANCE CRITERIA** | **UNIT VARIABLE AND ASSESSMENT GUIDE** |
|---|---|
| **Element 1: Describe the context for packages**<br>**1.1** Identify the *clients for packages*<br>**1.2** Identify *client requirements* in relation to packages<br>**1.3** Identify *host enterprise requirements* in relation to packages<br>**1.4** Identify *purposes of packages*<br>**1.5** Identify *products and services* for inclusion in packages<br>**Element 2: Source products and services for packages**<br>**2.1** Identify *sources of information* for products and services<br>**2.2** *Research information sources* to obtain targeted information | **Unit Variables**<br>The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment.<br>This unit applies to sourcing and evaluating products and services for inclusion in packages for sale to individual and/or generic groups of clients within the labour divisions of the hotel and travel industries and may include:<br>1. Travel Agencies<br>2. Tour Operation<br>*Clients for packages* may include:<br>• Individuals and groups, including one-off clients and identified target market sectors<br>• Day tour operators<br>• Hotels<br>• Outbound tour wholesalers<br>• Inbound tour operators<br>• Conference organisers. |

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| **2.3** *Assess applicability of identified products and services* to proposed packages<br>**2.4** *Select products and services* for the package<br>**Element 3: Create packages of products and services**<br>**3.1** Identify *pre-planning requirements* for packages<br>**3.2** Determine *components* of individual packages<br>**3.3** *Determine duration for packages*<br>**3.4** *Calculate price points* for packages<br>**3.5** Develop *terms and conditions* for the packages<br>**3.6** Prepare *draft itinerary* for packages<br>**3.7** *Prepare sales monitoring arrangements* for packages<br>**3.8** *Plan marketing activities* for packages | *Client requirements* must focus on identified client needs, wants and preferences and will include:<br>• Destination preferences<br>• Budget<br>• Timing and duration issues, including constraints and the need for integration with an associated tour or travel program<br>• Cultural and religious issues<br>• Product and service preferences<br>• Practicality<br>• Service styles and standards<br>• Identified focus for undertaking the trip.<br>*Host enterprise requirements* may be related to:<br>• Enhancing and expanding product range including product initiatives that conform to business plan and marketing objectives<br>• Profitability<br>• Movement into new target markets<br>• Reputation and image<br>• Business agreements, including franchise and other contractual arrangements<br>• Meeting competition<br>• Involvement of colleagues in determining requirements.<br>*Purposes of packages* may include:<br>• Conferences<br>• Social events |


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| | • Holidays and recreation<br>• Tour programs including day tours, extended tours, eco-tours, cultural tours and educational tours<br>• Special interest itineraries<br>• Incentives<br>• Series tours.<br>*Products and services* may relate to supplier, intermediary and/or touring packages promoted in brochures and include:<br>• Accommodation including serviced and non-serviced options<br>• Transport including air, rail, bus/coach and shipping<br>• Hire car including long and short-term rentals<br>• Attractions including natural and man-made<br>• Tours including side trips, one-day and extended tours<br>• Catering including bona fide meals and refreshments<br>• Entertainment including recreational, arts, sports, cultural, music, festivals, and special events<br>• Conference facilities<br>• Specialist services including guides, interpreters, secretarial support, child-minding and security.<br>*Sources of information* may include:<br>• Suppliers, carriers and providers, including those in distribution networks<br>• Local tourism information centres<br>• Embassies in identified locations/destinations |

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| | • Local operators including accommodation properties, tours, venues, restaurants and souvenir shops<br>• Tourism authorities including regional, domestic and international<br>• Industry associations including industry peak bodies and government authorities and agencies<br>• General literature including trade press, guide books, holiday and destination publications<br>• Internet<br>• Media<br>• Personal visits to destinations and site inspections of attractions, venues and facilities.<br>*Research information sources* may include:<br>• Undertaking desktop research including internet research and analysis of internal data contained on in-house systems<br>• Analysing existing secondary data including:<br>▪ Domestic and international visitor statistics on departures, expenditure, visitor nights<br>▪ Visitor profiles including tourist origins, volume, purpose of trip, seasonality, accommodation, transport and expenditure<br>▪ Industry and government research reports on industry trends, current development activity and forecasts of future developments<br>▪ Client feedback<br>▪ Feasibility studies for new developments or products<br>▪ Responses to surveys, questionnaires on preferences, needs and current tourist activities<br>• Conducting formal qualitative and quantitative market research including focus groups, surveys and questionnaires to generate primary research data |


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| | • Considering recent and emerging trends<br>• Using personal network of contacts<br>• Visiting providers, carriers and suppliers<br>• Undertaking personal observation<br>• Soliciting feedback from clients.<br>*Assess applicability of identified products and services* may relate to:<br>• Determining rates, costs, fees, charges, taxes for each package component<br>• Evaluating availability on a short-term and on-going basis, as required by the nature of the package<br>• Calculating return on investment, including consideration of loss leader implications<br>• Assessing compatibility with company image and reputation<br>• Verifying reputation of products and services, including assessment of client perceptions in relation to potential carriers, suppliers, destinations, products and services<br>• Identifying features and benefits, including comparisons with similar packages offered by competitors<br>• Checking match between products/services and identified objectives and client demand/requests for the package<br>• Determining destination characteristics, including accessibility and transport, accommodation and attractions, facilities, seasonal influences, degree of infrastructure, government regulations, special events, supporting venues and human resource potential to deliver required services, promotional potential, existing promotional material, retail outlets and ancillary support services<br>• Legal considerations<br>• Cultural sensitivity. |

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| | *Select products and services* may include:<br>• Aligning with identified objectives<br>• Complying with client requirements<br>• Ensuring availability<br>• Negotiating agreements with suppliers, carriers and providers – including obtaining written confirmation<br>• Ensuring value and potential saleability.<br>*Pre-planning requirements* may relate to:<br>• Seasonal influences<br>• Dates of one-off events<br>• Client demand<br>• Position of other packages in terms of product life-cycle<br>• Activities being undertaken by the competition.<br>*Components* refers to the products and services for individual packages and will relate to:<br>• Inclusion<br>• Exclusions<br>• Add-ons<br>• Available options, including substitutions and alternatives, where applicable.<br>*Determine duration for packages* may include:<br>• Formulating packages to accommodate differing timelines in order to meet identified client need<br>• Adding and removing inclusions to enable attainment of required duration while still delivering value and enabling saleability of package.<br>• Complying with agreed arrangements with suppliers, providers and carriers. |


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| | *Calculate price points* may include:<br>• Analysing prices offered by competition<br>• Determining target market affordability<br>• Ensuring required profit to host enterprise<br>• Identifying what the market will bear<br>• Developing price schedules, including special rates and discounts<br>• Determining host enterprise costs pertaining to package development and delivery<br>• Factoring in commissions.<br>*Terms and conditions* may relate to:<br>• Deposits and full/final payments<br>• Fees and charges, including penalties, terms of payment and timelines for payment<br>• Commissions due or payable<br>• Cancellations and alterations, including timelines and charges<br>• Limitation of liability<br>• Guarantees and warranties<br>• Complaint handling.<br>*Draft itinerary* may include:<br>• Day destinations<br>• Times<br>• Destinations<br>• Attractions, tours and sight-seeing<br>• Arranged activities |

| | |
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| | • Accommodation<br>• Transport<br>• Transfers.<br>*Prepare sales monitoring arrangements* may include:<br>• Establishing facilities to record enquiries in relation to packages<br>• Establishing internal systems to record package sales, including location of sale, seller, commissions and options selected<br>• Arranging for sales data to be forwarded from related businesses.<br>*Plan marketing activities* may include:<br>• Organising the launch of the packages<br>• Preparation of point-of-sales advertising material<br>• Organising media promotions, including advertisements, events and competitions<br>• Training sales staff in relation to the packages<br>• Designing client feedback tools.<br>**Assessment Guide**<br>The following skills and knowledge must be assessed as part of this unit:<br>• Enterprise policies and procedures in regard to developing packages and entering into agreements with suppliers, providers and carriers including the use of preferred suppliers/providers<br>• Packaging rules as appropriate to the host enterprise and the requirements of allied organisations<br>• Ability to use research, negotiation and analytical techniques |


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| | • Domestic and international rules, regulations, legislation and practices that apply to package formulation<br>• General industry knowledge of destinations, transport options, accommodation and potential for package-related inclusions suitable for a range of package types.<br>**Linkages To Other Units**<br>• Access and retrieve computer-based data<br>• Maintain hospitality industry knowledge<br>• Establish and maintain a business relationship<br>• Develop a marketing strategy and coordinate sales activities<br>• Develop new products and services<br>• Gather and present product information<br>• Use common business tools and technology<br>• Access and interpret product information<br>• Maintain product information inventory<br>• Source and provide destination information and advice<br>• Maintain contacts with handling agents<br>• Construct and apply tourism product research<br>• Co-ordinate production of brochures and marketing materials<br>• Prepare and submit quotations<br>• Manage and monitor innovative tourism programs and projects<br>• Source and present information. |

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| | **Critical Aspects of Assessment**<br>Evidence of the following is essential:<br>• Understanding of rules, regulations, legislation, policies and procedures applicable to package development within the host enterprise<br>• Demonstrated ability to source inclusions for a nominated package type to meet identified needs of a selected target group or individual<br>• Demonstrated ability to create and cost a saleable package to meet identified needs of a selected target group or individual<br>• Demonstrated ability to produce a set of appropriate and cost-effective marketing strategies to support the introduction and on-going sale of a nominated package.<br>**Context of Assessment**<br>Assessment must ensure:<br>• Actual or simulated workplace application of techniques, strategies and procedures to enable the sourcing of product and service information to enable the development of saleable packages.<br>**Resource Implications**<br>Training and assessment must include the use of real sources of information and systems, both internal and external, including the presence of relevant marketing research information to source products and services that will enable the development of packages to support the operation of the host enterprise; and access to workplace standards, procedures, policies, guidelines, tools and equipment.<br>**Assessment Methods**<br>The following methods may be used to assess competency for this unit:<br>• Observation of practical candidate performance<br>• Project to develop nominated package<br>• Portfolio of research documentation obtained as part of research and sourcing activities |


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- Hard copy description, including itinerary, for a nominated package
- Role plays
- Oral and written questions
- Third party reports completed by a supervisor
- Project and assignment work.

**Key Competencies in this Unit**

*Level 1 = competence to undertake tasks effectively*

*Level 2 = competence to manage tasks*

*Level 3 = competence to use concepts for evaluating*

| Key Competencies | Level | Examples |
|---|---|---|
| Collecting, organising and analysing information | 3 | Capture and evaluate material for potential inclusion in a package |
| Communicating ideas and information | 2 | Develop supporting informational and promotional material for a package |
| Planning and organising activities | 3 | Design package; organise arrangements with suppliers, carriers and providers |
| Working with others and in teams | 2 | Liaise with colleagues, suppliers, carriers and providers to develop package |
| Using mathematical ideas and techniques | 1 | Calculate costs and price schedules |
| Solving problems | 2 | Source replacement inclusions and alternate options for package |
| Using technology | 1 | Use the internet, computerised reservation and automated information systems |

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# Oral questions

| | |
|---|---|
| **Student name** | |
| **Assessor name** | |
| **Location/venue** | |
| **Unit of competency** | Source and package tourism products and services<br>D2.TCS.CL5.22<br>D2.TTA.CL2.18 |
| **Instructions** | 1. Ask student questions from the attached list to confirm knowledge, as necessary<br>2. Place tick in boxes to reflect student achievement (Pass Competent 'PC' or Not Yet Competent 'NYC')<br>3. Write short-form student answer in the space provided for each question. |

| **Questions** | **Response** | |
|---|---|---|
| | **PC** | **NYC** |
| 1. What is 'tourism packaging'? Why is it an important aspect of the travel and tourism industry? | ❑ | ❑ |
| 2. What are examples of needs for one target market segment of your choice? | ❑ | ❑ |

| Questions | Response | |
|---|---|---|
| | PC | NYC |
| 3. Why is it important to understand and review host enterprise requirements when constructing travel packages? | ❑ | ❑ |
| 4. What types of tour packages are popular in your country and why? | ❑ | ❑ |
| 5. What are examples of auxiliary arrangements that can be organised for clients? | ❑ | ❑ |


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| Questions | Response | |
|---|---|---|
| | PC | NYC |
| 6. What are sources of travel product and services information? | ❑ | ❑ |
| 7. Why is it important to research and collect accurate information relating to products and services for inclusion in a package? | ❑ | ❑ |
| 8. Why is it important to assess applicability of identified products and services for proposed packages? | ❑ | ❑ |

| Questions | Response | |
|---|---|---|
| | PC | NYC |
| 9. What activities are undertaken when identifying suitable suppliers of tourism products and services? | ❑ | ❑ |
| 10. What is the difference between a quotation and an itinerary? | ❑ | ❑ |
| 11. Why are images and perceptions of the destination important to a client when selecting products and services for a travel package? | ❑ | ❑ |


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| Questions | Response | |
|---|---|---|
| | PC | NYC |
| 12. What are two examples of seasonal influences that will affect the duration of a package? | ❑ | ❑ |
| 13. Why is it important to correctly cost packages? | ❑ | ❑ |
| 14. What are types of booking conditions associated with travel packages? | ❑ | ❑ |

| Questions | Response | |
|---|---|---|
| | PC | NYC |
| 15. What information is normally included in an itinerary? | ❑ | ❑ |
| 16. How can you monitor sales activities? | ❑ | ❑ |
| 17. What are two common marketing objectives? | ❑ | ❑ |


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# Written questions

Source and package tourism products and services – D2.TCS.CL5.22
D2.TTA.CL2.18

**Student Name:** _____

Answer all the following questions and submit to your Trainer.

1. What are types of clients who use travel packages?

_____

_____

_____

_____

2. What are types of tour operators who construct travel packages?

_____

_____

_____

_____

_____

3. What are specialist market segments which packaged tourism products and services can be prepared for?

_____

_____

_____

_____

_____

4. What are examples of generic client needs when seeking travel packages?

_____

_____

_____

_____

_____

5. What client personal information should you seek during an initial meeting with a client?

6. What are examples of host enterprise requirements that need to be considered when constructing packages?

7. What is the different between an independent and an inclusive tour package?

8. What are four purposes of travel packages?

9. What are the four categories of general products and services sought by clients?


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10. What are examples of land arrangements that can be organised for clients?

11. What are three types of travel and tourism businesses that provide products and services?

12. What are three examples of information that you may research in relating to a travel package?

13. What are three considerations when researching products and services for inclusion in travel package?

14. What is primary data? Provide two examples of how to collect primary data?

15. What are types of internal information sources?

16. What are two activities associated with assessing applicability of identified products and services for proposed packages?

17. What are three activities associated with selecting products and services for inclusion in travel packages?

18. What are three examples of suppliers of tourism products and services?

19. What are steps in creating packages?


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20. What needs to be planned when constructing packages?

21. What are different package components?

22. What are examples of destination facilities and services?

23. What are client driven factors that will affect the duration of a package?

24. What are supplier driven factors that will affect the duration of a package?

25. What are three activities associated with calculating costs of products and services for packages?

26. What are two 'cost price point' considerations when costing a travel package for a client?

27. What are three general examples of terms and conditions that apply to packages?

28. What information is normally included in a quotation?


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29. What are three examples of sales monitoring activities?

30. What are three promotional methods used to make clients aware of new packages?

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# Answers to written questions

Source and package tourism products and services – D2.TCS.CL5.22
D2.TTA.CL2.18

The following are model answers only – Trainers/Assessors must use discretion when determining whether or not an answer provided by a Student is acceptable or not.

**1. What are types of clients who use travel packages?**

- Domestic and international people
- Males and females
- People from different age groups
- Special interest groups
- Special needs clients
- Open groups
- Homogenous target market groups as defined by various demographic characteristics.

**2. What are types of tour operators who construct travel packages?**

- Travel agents
- Day tour operators
- Hotels
- Outbound tour wholesalers
- Inbound tour operators
- Conference organisers.

**3. What are specialist market segments which packaged tourism products and services can be prepared for?**

- Business
- Leisure
- Religious
- Sporting
- Outbound Tourists
- Inbound Tourists
- Domestic Tourists
- International Tourists.

**4. What are examples of generic client needs when seeking travel packages?**

- Value for money
- 'Offering' reflecting what was advertised
- Expectations met / exceeded
- To receive friendly service
- To be safe
- To be dealt with in a prompt and courteous manner
- To receive assistance when necessary
- To be in comfortable, clean surroundings
- To feel remembered and recognised
- To be heard and understood.

**5. What client personal information should you seek during an initial meeting with a client?**

- Name, initial and title
- Dates of birth for passengers, in particular children
- Contact details for home, work and mobiles
- Special meal requests or seating preferences
- Frequent flyer information and club memberships
- Details of travel such as dates, places and products
- Payment details
- Wholesaler or Consolidator used.

**6. What are examples of host enterprise requirements that need to be considered when constructing packages?**

- Business objectives
- Key market segments or clients
- Types and style of tourism activities and products current offered
- Types of products or services that could be combined with current activities and services
- How the packaging could be used to improve service
- Enhancing and expanding product range including product initiatives that conform to business plan and marketing objectives
- Movement into new target markets
- Reputation and image
- Business agreements, including franchise and other contractual arrangements
- Meeting competition
- Involvement of colleagues in determining requirements
- Potential increase in business and profitability.


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**7. What is the different between an independent and an inclusive tour package?**

- An independent tour is prepared to meet the needs of an individual client's specification. In this tour, a traveller is free and independent to select any component for his journey
- For inclusive tours, components are purchased, combined and sold as a package at an inclusive price to clients by a tour operator.

**8. What are four purposes of travel packages?**

- Specific age holidays, packages and tours
- General interest
- Conferences
- Social events
- Holidays and recreation
- Tour programs
- Incentives
- Series tours
- Eco-tours
- Education
- Experience
- Fitness
- Excitement / action experiences
- Celebration of an event / historical date
- Money raising
- Language
- Music
- Sports
- The environment
- Culture
- Arts
- Animals
- Food
- History
- Flora and fauna
- Natural attractions
- Shopping
- Four wheel driving
- Camping
- Cruises
- Luxury

- Budget
- Snow skiing
- Diving
- Rail
- Coach
- Safaris
- Family
- Overland treks/walking
- Beach
- Wedding ceremonies.

**9. What are the four categories of general products and services sought by clients?**

- Air
- Land
- Sea
- Auxiliary.

**10. What are examples of land arrangements that can be organised for clients?**

- Accommodation
- Transfers
- Transportation
- Tours
- Attractions, activities and entertainment.

**11. What are three types of travel and tourism businesses that provide products and services?**

- Airlines
- Other travel suppliers
- Suppliers and providers of support and ancillary services
- Accommodation
- Attractions and Theme Parks
- Tour Operators
- Inbound Tour Wholesaler
- Outbound Tour Wholesaler
- Retail Travel Agents
- Local, regional and national information services
- Meetings and Events
- Ministries of Tourism
- Tourism Boards
- Industry Authorities
- Industry Associations.


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**12. What are three examples of information that you may research in relating to a travel package?**

- Destination information
- Local community information
- International destination information
- Tours
- Attractions
- Activities
- History
- Geographical features
- Local customs and culture
- Climate
- Accommodation
- Amenities and services
- Airlines
- Car hire
- Cruises
- Transfers
- Rail.

**13. What are three considerations when researching products and services for inclusion in travel package?**

- The need to identify the research points
- Collecting primary and secondary data
- Recollection of personal observations
- Accessing internal sources of information
- Gathering feedback from customers
- Accessing external sources of information
- Establishing industry networks.

**14. What is primary data? Provide two examples of how to collect primary data?**

Primary research data is newly generated research information that you yourself or the organisation create.

- Customer surveys
- In-house questionnaires and feedback sheets
- Focus groups
- Electronic responses on the website
- Observation.

**15. What are types of internal information sources?**

- Customer databases
- Sales figures and statistics
- Data from sub-agencies and head office
- Customer feedback information
- Automated information systems
- Computerised reservation systems
- Products and services inventories.

**16. What are two activities associated with assessing applicability of identified products and services for proposed packages?**

- Determining rates, costs, fees, charges, taxes for each package component
- Evaluating availability on a short-term and on-going basis, as required by the nature of the package
- Calculating return on investment, including consideration of loss leader implications
- Assessing compatibility with company image and reputation
- Verifying reputation of products and services, including assessment of client perceptions in relation to potential carriers, suppliers, destinations, products and services
- Identifying features and benefits, including comparisons with similar packages offered by competitors
- Checking match between products/services and identified objectives and client demand/requests for the package
- Determining destination characteristics
- Understand local laws and regulations
- Cultural considerations
- Meeting special needs.


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**17. What are three activities associated with selecting products and services for inclusion in travel packages?**

- Identify list of final products and services
- Identify suitable suppliers
- Aligning with identified objectives
- Complying with client requirements
- Ensuring availability of products and services
- Negotiating agreements with suppliers, carriers and providers
- Organise supply of components and, where required, confirm agreements in writing.
- Ensure specific inclusion descriptions and cancellation policies are confirmed with the supplier
- Check and incorporate legal requirements for offering and promoting packages
- Present pricing structures to clearly indicate all inclusions and exclusions and add-ons
- Finalise and confirm details in writing
- Ensuring value and potential saleability.

**18. What are three examples of suppliers of tourism products and services?**

- Principals/suppliers
- Wholesalers/ tour operator
- Inbound tour operators
- Airlines, coach companies and rail
- Retail agents
- Ticket consolidators
- State and regional tourism authorities
- Conference, event and incentive companies.

**19. What are steps in creating packages?**

- Identify the target group
- Determine the theme of the tour
- Now that you have your theme, establish objectives
- Choose a title
- Determine the length of the tour
- Create a tentative itinerary
- Finalise the schedule
- Arrange and confirm supply
- Presentation of price
- Present your packaged program.

**20. What needs to be planned when constructing packages?**

- Answers will be varied.

**21. What are different package components?**

- Destination attractions
- Destination facilities and services
- Accessibility of the destination
- Images of the destination
- Inclusions and exclusions
- Price to the client.

**22. What are examples of destination facilities and services?**

- Accommodation
- Restaurants, bars and cafes
- Transport at the destinations
- Sports/activity
- Retail outlets
- Other services.

**23. What are client driven factors that will affect the duration of a package?**

- Their budget
- Designated dates
- Preferred destinations
- Preferred products and services.

**24. What are supplier driven factors that will affect the duration of a package?**

- Schedules of set tours
- Schedules of travel suppliers
- Supply and demand
- Supplier booking conditions.

**25. What are three activities associated with calculating costs of products and services for packages?**

- Ensuring comprehensiveness and accuracy of all information provided
- Taking into account price point considerations
- Negotiating costs with suppliers, providers and carriers to obtain optimal prices
- Identifying direct costs
- Calculating commissions
- Calculating mark-up net costs
- Identify organisational fees
- Applying host enterprise procedures
- Including all taxes, fees and other charges


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- Incorporating currency conversions
- Factoring allowable discounts
- Considering and including package deals
- Taking into account seasonal and other premiums
- Estimations based on current year prices.

**26. What are two 'cost price point' considerations when costing a travel package for a client?**

- Analysing prices offered by competition
- Determining target market affordability
- Ensuring required profit to host enterprise
- Identifying what the market will bear
- Developing price schedules, including special rates and discounts
- Determining host enterprise costs pertaining to package development and delivery
- Factoring in commissions.

**27. What are three general examples of terms and conditions that apply to packages?**

- Terms and methods of payment
- Dates for payment of deposits and final payment
- Notifications regarding final confirmation of the booking
- Cancellations and penalties and charges that apply
- Procedures and charges that apply to name and date changes for the booking
- Guarantees and warranties that apply to the products and services covered by the quotation
- Exclusion and limitation of liability clauses
- Identification of the period for which the quotation is valid
- Whether or not the quotation is subject to change with or without notice
- Reference to associated terms and conditions as imposed by third party providers
- General industry rules, regulations and codes.

**28. What information is normally included in a quotation?**

- Date of quotation and reference number
- Clients name
- Phone contacts and fax
- Email address
- Address
- Month of travel
- Length of travel and class of travel
- Flight details
- Tours
- Accommodation
- Transfers
- Inclusions and exclusions
- Insurance details
- Payment requirements and cancellation fees
- Conditions of the quote
- Deposits required
- Service fees
- Expiry date of the quotation
- General conditions and rules.

**29. What are three examples of sales monitoring activities?**

- Evaluating the results of different sales activities with reference to the nominated key performance indicators and sales objectives established by the organisation
- Identifying the sales turnover achieved by our sales team
- Track the performance of our sales team and develop appropriate strategies to help them perform better
- Evaluating the sales performance of individuals in the organisation
- Determine trends in sales and consumer preferences
- Distinguish between strong and weak products / services
- Better understand the performance of our products and services and determine how to exploit their strengths and enhance their weaknesses.
- Evaluating the success of different packages advertised to clients
- Identifying satisfaction level of clients who have undertaken packages prepared by the organisation
- Identifying innovative package suggestions
- Make better sales forecast and set more realistic sales targets in future.


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**30. What are three promotional methods used to make clients aware of new packages?**

- Personal selling
- Sales promotions
- Advertising
- Publicity
- Sponsorship
- Public relations
- Newsletters
- Special Events
- Community Relations
- Media Releases
- On-site tour
- Social media activities.

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# Observation checklist

| | |
|---|---|
| **Student name** | |
| **Assessor name** | |
| **Location/venue** | |
| **Unit of competency** | Source and package tourism products and services<br>D2.TCS.CL5.22<br>D2.TTA.CL2.18 |
| **Dates of observation** | |
| **Instructions** | 1. Over a period of time observe the student completing each of the following tasks:<br>a) Describe the context for packages<br>b) Source products and services for packages<br>c) Create packages of products and services<br>2. Enter the date on which the tasks were undertaken<br>3. Place a tick in the box to show they completed each aspect of the task to the standard expected in the enterprise<br>4. Complete the feedback sections of the form, if required. |

| **Did the candidate** | **Yes** | **No** |
|---|---|---|
| **Element 1: Describe the context for packages** | | |
| Identify the clients for packages | ❑ | ❑ |
| Identify client requirements in relation to packages | ❑ | ❑ |
| Identify host enterprise requirements in relation to packages | ❑ | ❑ |
| Identify purposes of packages | ❑ | ❑ |
| Identify products and services for inclusion in packages | ❑ | ❑ |
| **Element 2: Source products and services for packages** | | |
| Identify sources of information for products and services | ❑ | ❑ |
| Research information sources to obtain targeted information | ❑ | ❑ |

| Did the candidate | Yes | No |
|---|---|---|
| Assess applicability of identified products and services to proposed packages | ❑ | ❑ |
| Select products and services for the package | ❑ | ❑ |
| **Element 3: Create packages of products and services** | | |
| Identify pre-planning requirements for packages | ❑ | ❑ |
| Determine components of individual packages | ❑ | ❑ |
| Determine duration for packages | ❑ | ❑ |
| Calculate price points for packages | ❑ | ❑ |
| Develop terms and conditions for the packages | ❑ | ❑ |
| Prepare draft itinerary for packages | ❑ | ❑ |
| Prepare sales monitoring arrangements for packages | ❑ | ❑ |
| Plan marketing activities for packages | ❑ | ❑ |
| **Did the student's overall performance meet the standard?** | ❑ | ❑ |


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| Feedback to student and trainer/assessor |
|---|
| **Strengths:** |
| **Improvements needed:** |
| **General comments:** |

| | | | |
|---|---|---|---|
| **Candidate signature** | | **Date** | |
| **Assessor signature** | | **Date** | |

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# Third Party Statement

| | | | |
|---|---|---|---|
| **Student name:** | | | |
| **Name of third party:** | | **Contact no:** | |
| **Relationship to student:** | ❑ Employer ❑ Supervisor ❑ Colleague ❑ Other<br>*Please specify:*_____<br>*Please do not complete the form if you are a relative, close friend or have a conflict of interest]* | | |
| **Unit of competency:** | Source and package tourism products and services<br>D2.TCS.CL5.22<br>D2.TTA.CL2.18 | | |

The student is being assessed against industry competency standards and we are seeking your support in the judgement of their competence.

Please answer these questions as a record of their performance while working with you. Thank you for your time.

| **Do you believe the trainee has demonstrated the following skills?**<br>*(tick the correct response]* | **Yes** | **No** | **Not sure** |
|---|---|---|---|
| **Element 1: Describe the context for packages** | | | |
| Identify the clients for packages | ❑ | ❑ | ❑ |
| Identify client requirements in relation to packages | ❑ | ❑ | ❑ |
| Identify host enterprise requirements in relation to packages | ❑ | ❑ | ❑ |
| Identify purposes of packages | ❑ | ❑ | ❑ |
| Identify products and services for inclusion in packages | ❑ | ❑ | ❑ |
| **Element 2: Source products and services for packages** | | | |
| Identify sources of information for products and services | ❑ | ❑ | ❑ |
| Research information sources to obtain targeted information | ❑ | ❑ | ❑ |
| Assess applicability of identified products and services to proposed packages | ❑ | ❑ | ❑ |
| Select products and services for the package | ❑ | ❑ | ❑ |

| **Element 3: Create packages of products and services** | | | |
|---|---|---|---|
| Identify pre-planning requirements for packages | ❑ | ❑ | ❑ |
| Determine components of individual packages | ❑ | ❑ | ❑ |
| Determine duration for packages | ❑ | ❑ | ❑ |
| Calculate price points for packages | ❑ | ❑ | ❑ |
| Develop terms and conditions for the packages | ❑ | ❑ | ❑ |
| Prepare draft itinerary for packages | ❑ | ❑ | ❑ |
| Prepare sales monitoring arrangements for packages | ❑ | ❑ | ❑ |
| Plan marketing activities for packages | ❑ | ❑ | ❑ |


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| **Comments/feedback from Third Party to Trainer/Assessor:** | |
|---|---|
| | |
| **Third party signature:** | **Date:** |
| **Send to:** | |

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# Competency recording sheet

| | | |
|---|---|---|
| **Name of Student** | | |
| **Name of Assessor/s** | | |
| **Unit of Competency** | Source and package tourism products and services | D2.TCS.CL5.22 D2.TTA.CL2.18 |
| **Date assessment commenced** | | |
| **Date assessment finalised** | | |
| **Assessment decision** | Pass Competent / Not Yet Competent (Circle one) | |
| **Follow up action required**<br>(Insert additional work and assessment required to achieve competency) | | |
| **Comments/observations by assessor/s** | | |

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

| Element & Performance Criteria | Observation of skills | 3rd Party Statement | Oral Questions | Written Questions | Work Projects | Other |
|---|---|---|---|---|---|---|
| **Element 1: Describe the context for packages** | | | | | | |
| Identify the clients for packages | | | | | | |
| Identify client requirements in relation to packages | | | | | | |
| Identify host enterprise requirements in relation to packages | | | | | | |
| Identify purposes of packages | | | | | | |
| Identify products and services for inclusion in packages | | | | | | |
| **Element 2: Source products and services for packages** | | | | | | |
| Identify sources of information for products and services | | | | | | |
| Research information sources to obtain targeted information | | | | | | |
| Assess applicability of identified products and services to proposed packages | | | | | | |
| Select products and services for the package | | | | | | |


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Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

| Element & Performance Criteria | Observation of skills | 3rd Party Statement | Oral Questions | Written Questions | Work Projects | Other |
|---|---|---|---|---|---|---|
| **Element 3: Create packages of products and services** | | | | | | |
| Identify pre-planning requirements for packages | | | | | | |
| Determine components of individual packages | | | | | | |
| Determine duration for packages | | | | | | |
| Calculate price points for packages | | | | | | |
| Develop terms and conditions for the packages | | | | | | |
| Prepare draft itinerary for packages | | | | | | |
| Prepare sales monitoring arrangements for packages | | | | | | |
| Plan marketing activities for packages | | | | | | |

| | | | |
|---|---|---|---|
| **Candidate signature:** | | **Date:** | |
| **Assessor signature:** | | **Date:** | |

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# SOURCE AND PACKAGE TOURISM PRODUCTS AND SERVICES











**D2.TCS.CL5.22**
**D2.TTA.CL2.18**

# Subject elements

This unit comprises three Elements:

- Describe the context for packages
- Source products and services for packages
- Create packages of products and services



# Assessment

Assessment for this unit may include:

- Oral questions
- Written questions
- Work projects
- Workplace observation of practical skills
- Practical exercises
- Formal report from supervisor



# Element 1:

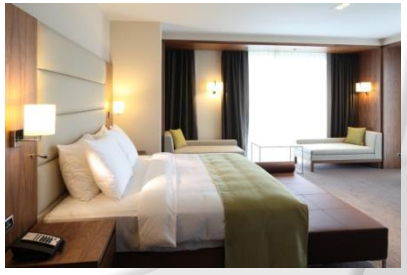
## *Describe the context for packages*



# Describe the context for packages

Performance Criteria for this Element are:

- Identify the clients for packages
- Identify client requirements in relation to packages
- Identify host enterprise requirements in relation to packages
- Identify purposes of packages
- Identify products and services for inclusion in packages



# Tourism packages

**Importance of tourism packages**

- Tourism packages are an integral part of the travel and tourism industry
- The ever increasing rise in popularity in tourism packages demonstrates that it still is an attractive option for many clients in meeting their travel needs



# Tourism packages

**Variety of tourism packages**

Today, travel packages are aimed at:

- Different clients
- With different budgets
- Seeking different experiences
- For different durations
- In all corners of the world



# Tourism packages

**What is packaging?**

- Many tourism businesses package various tourism products and present them as a combined product to their client
- This is called packaging
- Any type of tourism component can be packaged with another



# Tourism packages

**Tour component products and services**



- Single or multiple products and services
- Accommodation
- Meals
- Transfers and transport, for example air, sea, rail, car hire
- Entrances to attractions for example wildlife parks, theme parks, national parks, museums

# Tourism packages

**Tour component products and services**

- Tourist guiding services & tours
- Tickets to entertainment, events or adventure activities
- Venue and equipment hire
- Meetings, events, functions and conferences

***COMPLETE ACTIVITY 1***



# Types of clients

**Types of clients**

- Domestic and international people
- Males and females
- People from different age groups
- Special interest groups
- Special needs clients
- Open groups
- Homogenous target market groups as defined by various demographic characteristics



# Types of tour operators

**Types of tour operators**

Almost every tourism operator gets involved with combining individual components and selling them as a package:

- Travel agents
- Day tour operators
- Hotels
- Outbound tour wholesalers
- Inbound tour operators
- Conference organisers



# Characteristics of clients

**Understanding characteristics of market segments**

- There are many ways to identify different segments of clients seeking tourism packages
- Each organisation will breakdown the potential market to suit the needs and to help identify the potential of each group



# Characteristics of clients

**Generic market segments**

- Age
- Social background
- Economic background
- Cultural background
- Special interests
- Physical and mental abilities
- Dietary needs



# Characteristics of clients

**Specialised market segments**

- Business
- Leisure
- Religious
- Sporting
- Outbound Tourists
- Inbound Tourists
- Domestic Tourists
- International Tourists



# Identify client requirements

**Importance of identifying client requirements**

- Once different types of clients and market segments have been indentified, it is essential to understand what their needs may be, when seeking appropriate tourism packages
- Whilst there will be generic needs that all clients will have, each market segment will also have their own specialised needs that must be addressed



# Identify client requirements

**Understanding needs, wishes and expectations**

What is the difference between:

- Needs
- Wishes
- Expectations



# Identify client requirements

**Generic needs**

- Value for money
- ‘Offering’ reflecting what was advertised
- Expectations met / exceeded
- To receive friendly service
- To be safe



# Identify client requirements

**Generic needs**

- To be dealt with in a prompt and courteous manner
- To receive assistance when necessary
- To be in comfortable, clean surroundings
- To feel remembered and recognised
- To be heard and understood

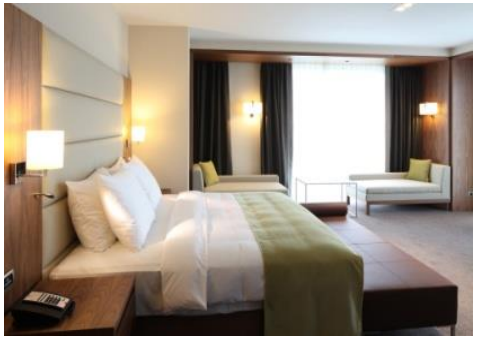


# Identify client requirements

**Specific target market needs**

What are the specific needs of these market segments?

- Business
- Women
- Family
- Leisure
- Elderly
- Others



# Identify client requirements

**Tour client needs**

- Quiet time
- Free time
- Personal enjoyment of site
- Adequate rest time
- ‘Up close and personal’ opportunities
- Access to areas which are ‘off limits’ to other people or are not part of a tour
- Special photo opportunities with animals, characters or unique sights



***COMPLETE ACTIVITY 2***

# Identify tourism trends

**Importance of identifying industry trends**

Not only is it important to understanding of the needs of possible clients and market segments it is also important to understand the travel trends that are affecting the tourism industry:

- Why is it important to understand industry trends?
- How can you find out about industry trends?



# Identify tourism trends

**Current tourism trends**

- Leisure time
- Demographic factors
- Lifestyle
- Environmental tourism
- Sustainable tourism



# Identify tourism trends

**Current tourism trends**

- Changes in the way holidays are booked
- Growth in additional holidays and short breaks
- Destination choice
- Increased awareness of the needs of disabled people



# Identify tourism statistics

**Statistics**

Statistics is the study of the collection, analysis, interpretation, presentation, and organisation of data.

- Why is it important to gather statistics?
- How can it benefit customers?
- What information do you seek under each category?
- How can you gather this information?



# Identify tourism statistics

## Industry statistics

- Statistics produced by research organisations on visitor numbers and tourist origins
- Statistics available in reports from government on visitor number and tourist origins
- Statistics available in reports from industry on visitor numbers and tourist origins



# Identify tourism statistics

**Industry statistics**

- Internal figures
- Industry trends reports
- International visitor statistics on arrivals, departures, visitor nights
- Visitor profiles including tourist origins, volume
- Industry and government research reports on industry trends, current development activity, forecasts of future developments



# Identify tourism statistics

**Industry statistics**

- Types of tourism businesses
- Types and demographics of clients
- Top destinations
- Reasons for stays
- Current industry information
- Destination countries



# Identify tourism statistics

**Industry statistics**

- Departure months
- Length of stay
- Type of organisation for the trip
- Spending patterns of consumers
- Characteristics of consumers



# Identify tourism statistics

**Researching tourism trends and statistics**

With this information you will be able to start researching for suitable products and services for packaging.

Several methods should be used including:

- Desk research
- Personal contact




***COMPLETE ACTIVITY 3***

# Seek client personal information

- Name, initial and title
- Dates of birth for passengers, in particular children
- Contact details for home, work and mobiles
- Special meal requests or seating preferences
- Frequent flyer information and club memberships
- Details of travel such as dates, places and products
- Payment details
- Wholesaler or Consolidator used



# Identify client travel details and requirements

- Name and contact details of the client including details of the traveller where the contact is not the user
- Proposed itinerary, including destinations (intermediary and final destinations), services and activities required, attractions to be visited
- Product and service preferences
- Practicality



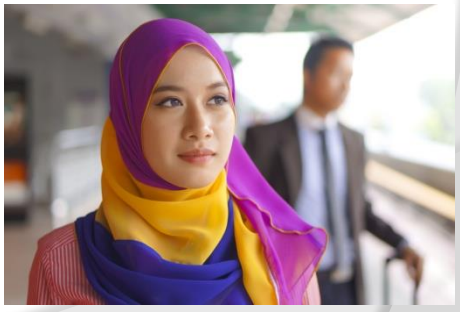
# Identify client travel details and requirements

- Service styles and standards
- Accommodation and dining/catering requirements
- Budget
- Dates and times, including specific days, seasonal imperatives and duration
- Timing and duration issues, including constraints and the need for integration with an associated tour or travel program



# Identify client travel details and requirements

- Client numbers and classification, including adults, children, babies and groups
- Preferred travel options, including destination travel requirements
- Reasons for trip
- Non-negotiable elements
- Previous history of the client in relation bookings made
- Cultural and religious issues



# Understanding client needs, wants and expectations

**Using a Quotation Planner**

Each organisation will have established pro-formas or documents which must be used by staff when collecting information from customers in which quotations can be based around.

- What is the benefit of using a quotation planner?
- What information do you wish to collect?



***COMPLETE ACTIVITY 4***

# Identify host requirements

**Importance of understanding host requirements**

- Whilst the needs of the client are of primary concern when developing packages, it is essential that packages are researched and constructed in a manner that complies with your tourism organisation



# Identify host requirements

**Review host enterprise requirements**

- Business objectives
- Key market segments or clients
- Types and style of tourism activities and products current offered
- Types of products or services that could be combined with current activities and services
- How the packaging could be used to improve service



# Identify host requirements

**Review host enterprise requirements**

- Enhancing and expanding product range including product initiatives that conform to business plan and marketing objectives
- Movement into new target markets
- Reputation and image
- Business agreements, including franchise and other contractual arrangements



# Identify host requirements

**Review host enterprise requirements**

- Meeting competition
- Involvement of colleagues in determining requirements
- Potential increase in business and profitability

***COMPLETE ACTIVITY 5***



# Types of tour packages

**Variety of tour packages**

Recently, the tourism industry has responded positively with ever expanding needs for new and variety of tour packages demanded by clients, in all corners of the world:

- What diversity of tours are there?



# Types of tour packages

**Independent Tours**

An independent tour is prepared to meet the needs of an individual client's specification. In this tour, a traveler is free and independent to select any component for his journey:

- What are examples of these tours?
- What are the advantages / disadvantages of these tours?



# Types of tour packages

**Inclusive Tours**

Tour components are purchased, combined and sold as a package at an inclusive price to clients by a tour operator is known as an inclusive tour:

- What are examples of these tours?
- What are the advantages / disadvantages of these tours?



# Types of tour packages

**Escorted Tours**

This type of tour is also known as a ‘Conducted Tour’.

A tour escort is provided from the starting point back to the point of return to accompany the tour members.

- What are examples of these tours?
- What are the advantages / disadvantages of these tours?



# Types of tour packages

**Business Tours**

Two forms of business tours have received a special attention from the tour operators.

These are:

- Conference Package
- Special Events Package



# Types of tour packages

**Incentive tours**

Offered by a business organisation to its employees and their spouses as reward for some special endeavour or as a spur to achievement:

- What are examples of these tours?
- What are the advantages / disadvantages of these tours?



# Types of tour packages

**Special interest tours**

Inbound Tour Operators and Outbound Tour Operators regularly design on-off itineraries.

Special interest groups generally share a common interest and may want to book specialist products or services:

- What are examples of these tours?
- What are the advantages / disadvantages of these tours?



# Purpose of tour packages

- Specific age holidays, packages and tours
- General interest
- Conferences
- Social events
- Holidays and recreation
- Tour programs
- Incentives



# Purpose of tour packages

- Series tours
- Eco-tours
- Education
- Experience
- Fitness
- Excitement / action experiences
- Celebration of an event / historical date



# Purpose of tour packages

- Money raising
- Language
- Music
- Sports
- The environment
- Culture
- Arts



# Purpose of tour packages

- Animals
- Food
- History
- Flora and fauna
- Natural attractions
- Shopping
- Four wheel driving



# Purpose of tour packages

- Camping
- Cruises
- Luxury
- Budget
- Snow skiing
- Diving
- Rail



# Purpose of tour packages

- Coach
- Safaris
- Family
- Overland treks / walking
- Beach
- Wedding ceremonies



# Location of tours

Whilst tours can be conducted anywhere in the world, they are normally categorised as being held:

- On-site
- ‘Elsewhere’

***COMPLETE ACTIVITY 6***



# Identify package products and services

**Identify products and services for inclusions in packages**

Identifying, sourcing and selecting product and services for inclusion in a package is reliant on finding a balance of meeting your client needs with understanding of what is possible:

- What needs to be considered?



# Identify package products and services

**Identify products and services for inclusions in packages**

It is also based on identifying:

- Availability of appropriate products and services to suit the stated or established client needs
- Suitable suppliers or wholesalers that can provide these products
- Prices that meet the passengers budget



# Identify package products and services

**Importance of collecting information on products and services for packages**

This includes finding the answers to questions such as:

- What is it?
- Where is it?
- How do you get it?
- How long does it take?
- What is included?
- What is excluded?
- What is it like?
- How much does it cost?
- What would you recommend?



# Identify package products and services

**General products and services sought by clients**

Products and services can be divided into the main areas of :

- Air – air travel and associated taxes
- Land – anything that is not air travel or a cruise
- Sea – cruises, ferries etc
- Auxiliary – any product or service that supports the travel experience



# Identify package products and services

**Land arrangements**

- Accommodation
- Transfers
- Transportation
- Tours
- Attractions, activities and entertainment



# Identify package products and services

**Auxiliary products and services**

- Travel Insurance
- Currency and banking
- Visas
- Merchandise
- Airport parking




***COMPLETE ACTIVITY 7***

# Element 2:

## *Source products and services for packages*



# Source products and services for packages

Performance Criteria for this Element are:

- Identify sources of information for products and services
- Research information sources to obtain targeted information
- Assess applicability of identified products and services to proposed packages
- Select products and services for the package



# Sources of information

**Identify potential sources of information**

There are endless sources of information that can be collected, analysed and used by a travel and tourism organisation for the benefit of the organisation itself or to assist customers with potential travel plans.

This section will explore:

- Types of tourism industry organisations
- Identify types of product and services information
- Sources of product and services information



# Travel and tourism businesses

**Identify travel and tourism businesses**

When compiling product information for inclusion in packages it is essential to identify the different types of businesses in which your potential customers may use:

- What types of businesses do you seek product information from?



# Travel and tourism businesses

**Transportation**

- Airlines
- Cruise operators
- Railway operators
- Bus lines
- Car rental businesses
- Limousine hire
- Taxis



# Travel and tourism businesses

**Suppliers and providers of support and ancillary services**

- Travel insurance providers
- Finance providers
- Currency exchange
- Conference and similar venues
- Interpreters



# Travel and tourism businesses

**Accommodation**

- Hotels and motels
- Guest houses
- Bed and breakfasts
- Caravan parks and camping grounds
- Resorts
- Time share properties
- Apartments, villas and cottages
- Conference and exhibition centres



# Travel and tourism businesses

**Attractions and Theme Parks**

- Museums and galleries
- National parks, wildlife parks and gardens
- Theme parks
- Heritage sites and centres
- Sport and activity centres
- Aquarium and zoos



# Travel and tourism businesses

## Tour Operators

- A tour operator typically organises sightseeing tours and accommodation in a particular destination or region.
- They act as a middle person between the Wholesaler and the Principal or Supplier of the product



# Travel and tourism businesses

**Inbound Tour Wholesaler**

- An Inbound Tour Wholesaler packages products to form a trip for an overseas market travelling to a specific country

**Outbound Tour Wholesaler**

- An Outbound Tour Wholesaler negotiates product from International Suppliers for clients in a specific travelling to an international destination



# Travel and tourism businesses

## Retail Travel Agents

- A Retail Travel agent is the go-between between the client and the Wholesaler
- It is the Retail agent who obtains all the relevant details from a client to enable them to make a booking through a Wholesaler



# Travel and tourism businesses

**Local, regional and national information services**

- These information services exist to assist the public and Travel agents in obtaining information on a particular region from the experts
- This can be at a local, regional or national level



# Travel and tourism businesses

**MICE**

- Meetings
- Incentives
- Conventions
- Exhibitions



# Travel and tourism businesses

**Ministries of Tourism**

- Almost every country within the ASEAN region will have dedicated government ministry specifically focused on the tourism industry
- Their role is to regulate and manage the industry



# Travel and tourism businesses

**Tourism Boards**

- Coordinate the efforts of hotels, airlines and travel agents to develop the tourism industry of the country
- Initiate new marketing ideas to promote image aboard
- Provide travel agent licensing and tourist guide training
- Promote the development of infrastructure and tourist attractions
- Organise events to attract visitors



# Travel and tourism businesses

## Industry Authorities

- Authorities are established, either by a government or working closely with government to provide services relating to the tourism industry



# Travel and tourism businesses

## Industry Associations

Industry associations are bodies that all businesses can elect to join that serve specific and over-arching industry sectors.

- Representing the industry
- Offer legal advice
- Provide training
- Identify cost savings



***COMPLETE ACTIVITY 8***

# Identify product information

## Identify product information to gather

Before seeking information from each of these types of businesses it is important to identify the types of information that you require from each to help you advise your clients in their future travel needs:

- What types of product information do you want to gather?



# Identify product information

**Destination information**

- General destination information
- Statistical information
- Currency
- Maps
- Travel guides
- Events



# Identify product information

**Destination information**

- Languages
- Safety
- Government information
- Time zones
- Communications



# Identify product information

**Local community information**

- Local attractions
- Shopping and retail areas
- Events and festivals
- Eateries
- Supermarkets
- Local transport
- Activities
- Places of worship



# Identify product information

## International destination information

When providing information on international destinations to your customers, you will need to advise them of the government regulations that apply when people wish to leave the country:

- What information do you need to gather and explain to clients wishing to travel overseas?



# Identify product information

**Tours**

- Company name, name of tour and duration
- Departure date, time and location address
- End date, time and location address
- Type of accommodation e.g. single, twin-share
- Tour company specific baggage labels
- Hotel list
- Tour information booklet
- Included services



# Identify product information

**Attractions**

Attractions can include:

- Historic sites
- Scenic location
- Special event



Tourist attractions can be:

- Natural
- Man-made

# Identify product information

## Activities

- What are examples of tourism related activities?



# Identify product information

**History**

Many people are interested in history, and therefore information on the history of a destination can be important to customers

- What are examples of history that attracts tourism?



# Identify product information

**Geographical features**

- Mountain ranges
- Lakes
- Rivers
- Caves
- Waterfalls
- Rock formations
- Beaches
- National parks



# Identify product information

**Local customs and culture**

Every destination will have customs that are specific to that place and that particular culture.

What are examples of:

- Local customs
- Local culture



# Identify product information

**Climate**

It is important that you understand the weather conditions and patterns of the destination:

- Why is this important?
- How can you identify climatic conditions?



# Identify product information

**Accommodation**

- Room types
- Tariffs
- Products and services
- Room facilities
- Location and distance to attractions
- Packages
- Blocked dates
- Seasons and times
- Minimum purchase



# Identify product information

**Accommodation**

- Booking and stay requirements
- Property name and address
- Room type and category
- Number of nights
- Check-in and check-out dates
- Check-in and check-out times



# Identify product information

**Accommodation**

- Day use or late check-out if applicable
- Inclusions
- Extra charges payable direct
- Special requests
- Special promotions



# Identify product information

**Amenities and services**

Amenities and services refer to the provision of basic services for travellers including:

- Toilet blocks
- Water
- Electricity
- Food and beverage including restaurants, cafes, bistros
- Medical services



# Identify product information

**Amenities and services**

- Banks and post offices
- General safety facilities including fire, police emergency services
- Entertainment
- Sporting
- Shopping



# Identify product information

**Airlines**

- Airline or combination of airlines
- Airport codes
- Airline codes
- City codes
- Flight numbers
- Schedules / timetables
- Destinations
- Routing



# Identify product information

**Airlines**

- Origin and destination
- Code share flights
- Normal fares
- Discounted fares, including infants, children, students, pensioners and groups
- Fares for unaccompanied children
- Promotional fares and packages
- Taxes



# Identify product information

**Airlines**

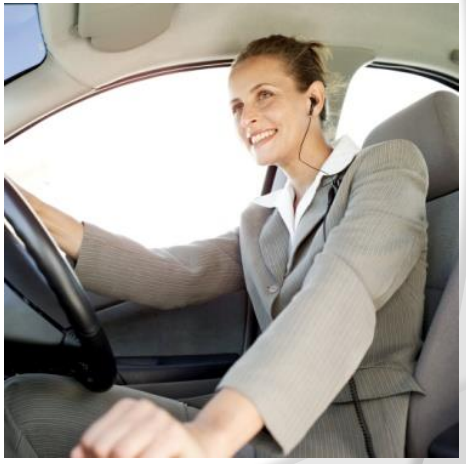
- General air travel rules and restrictions
- Class of travel
- Stopovers
- Mileage restrictions allowed
- Minimum and maximum stays
- Ticketing time limit
- Payment conditions



# Identify product information

**Car hire**

- Company, category, type
- Pick-up and drop-off depots
- Pick-up and drop-off dates and times
- Inclusions and exclusions
- Special requests
- Notes



# Identify product information

**Cruises**

- Name of the ship and voyage number
- Embarkation date, time and port address
- Disembarkation date, time and port address
- Grade/category and cabin type and number
- Passenger dining preference
- Pre-booked special requirements



# Identify product information

**Transfers**

- Name of company providing the transfer
- Local address and local telephone contact
- Type of transfer
- Pick-up date, time and location
- Drop-off date, location
- Special instructions in relation to transfer



# Identify product information

**Rail**

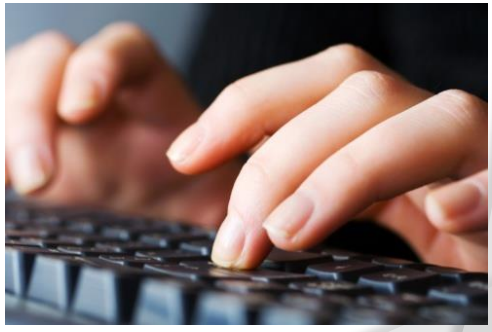
- Name of Pass
- Duration and type of pass
- Validity dates



# Product and services information

**Sources of travel product and services information**

- Brochures/DVDs
- Hotel and accommodation guides and indexes
- Atlases, maps and encyclopedias
- Travel guides
- Individual timetables
- Automated information systems
- Computerised Reservations Systems (CRS)



# Product and services information

**Sources of travel product and services information**

- International airline guides
- Travel Trade Yearbook
- Travel Information Manual (TIM)
- Passenger air tariff
- Trade press
- General print and electronic media, travel magazines and even news bulletins for current issues



# Product and services information

**Sources of travel product and services information**

- Educationals
- Product familiarisations
- Other organisations in the industry
- The internet, travel websites, travel advisor, blogs
- Travel companies product launches, travel shows and information nights
- Government agencies such as national parks and wildlife services or government tourism offices



# Product and services information

**Sources of travel product and services information**

- Intranet Websites
- Internal information databases
- Product manuals
- Supplier information and sales kits and their sales representatives
- Destination and product experts in wholesale reservation call centres



# Product and services information

**Sources of travel product and services information**

- Confidential and general industry tariffs
- Preferred contracts and/or agreements
- Official country tourist offices, authorities and bureaus
- Your own travel experience
- Colleagues



# Research information sources

**Importance of research**

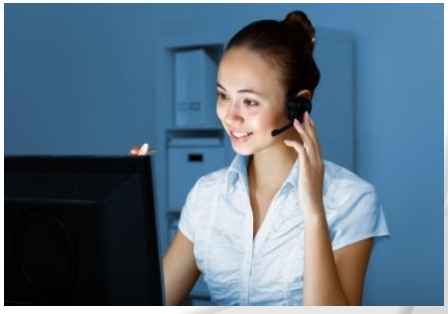
- Now that you have identified different tourism businesses that provide tourism products and services that can be included in tourism packages, it is now time to start the research process
- The aim of the research process is to collect accurate and relevant information to meet the needs of the client and any requests they have made



# Research information sources

**Research considerations**

- The need to identify the research points
- Collecting primary and secondary data
- Recollection of personal observations
- Accessing internal sources of information
- Gathering feedback from customers
- Accessing external sources of information
- Establishing industry networks



# Research information sources

**Defining the research topic**

- The first step is to try to identify exactly where the focus of research and information collection should be concentrated on



# Research information sources

**Collect primary and secondary data**

Data is a piece of information that can be collected and interpreted by an organisation for their use.

The two most common sources of data are:

- Primary data – collected for a specific purpose
- Secondary data – generic information



# Primary data

**Primary data**

Primary research data is newly generated research information that you yourself or the organisation create.

- Customer surveys
- In-house questionnaires and feedback sheets
- Focus groups
- Electronic responses on the website
- Observation



# Primary data

**Qualitative or quantitative research**

Primary data is considered to be either:

- Qualitative research
- Quantitative research



# Primary data

## Qualitative research

- Qualitative research does not look at numbers but tries to find out the reasoning behind certain actions, procedures, activities or ways of thought

## Quantitative research

- Quantitative research is market research, based on structured, closed-ended questionnaires, which aims to gather responses that can be summarised in numbers



# Secondary data

**Importance of secondary data**

Secondary data is information that already exists.

It just needs to be found:

- What are the benefits of secondary data?
- What are sources of secondary data?



# Secondary data

**Types of secondary data**

- Domestic and international visitor statistics on departures, expenditure, visitor nights
- Visitor profiles including tourist origins, volume, purpose of trip, seasonality, accommodation, transport and expenditure
- Industry and government research reports on industry trends, current development activity and forecasts of future developments



# Secondary data

**Types of secondary data**

- Client feedback
- Feasibility studies for new developments or products
- Responses to surveys, questionnaires on preferences, needs and current tourist activities



# Secondary data

**Sources of secondary data**

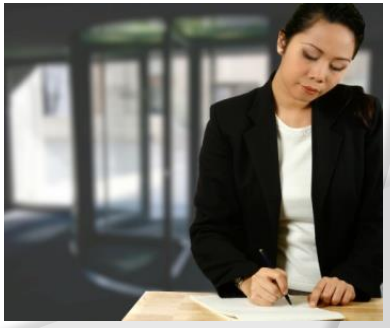


- Government statistics
- Libraries
- Internet
- Government websites
- Private market research firms
- Trade, professional and business associations
- Newspapers and magazines
- Business and industry-specific journals and periodicals

# Observations

**Recollection of personal observations and experiences**

- Previous bookings
- Discussions had with previous clients
- Familiarisation tours previously conducted
- Personal notes
- Report and findings
- Log books
- Records of interviews
- Notes of first-hand meetings



# Accessing internal information

**Arrange to receive internal information**

- Who can you receive information from?
- What types of information can you receive?
- How can you receive the information?



# Accessing internal information

**Extract data from internal information sources**

In the majority of cases, tourism product and service information that is required for possible inclusion tourism packages service activities can be obtained through the investigation and extraction of data from internal information systems:

- What are examples of internal information sources?



# Accessing internal information

**Types of internal information sources**

- Customer databases
- Sales figures and statistics
- Data from sub-agencies and head office
- Customer feedback information
- Automated information systems
- Computerised reservation systems
- Products and services inventories



# Feedback from customers

**Gathering information from customers**

Feedback from other clients who have experienced a specific tourism product or service firsthand can be invaluable in recommending and finding out accurate information.

How can you gather:

- Formal feedback
- Informal feedback



# Accessing external information

**Arrange to receive external information**

- Telephoning targeted organisations
- Making face-to-face requests of staff that visit their office
- Making e-mail requests
- Registering to receive information, newsletters and up-dates.
- Paying to receive material
- Asking organisations to forward information



# Visit identified sources

- At times you may be required to visit identified sources
- This opportunity to gather a first-hand understanding of the source, including key personnel who will be instrumental in sharing information is very beneficial



# Visit identified sources

**Benefits of visiting identified sources**

- Meet key personnel
- Talking with personnel to obtain, clarify, update and identify supplementary relevant information
- Gain an understanding of the operation
- Viewing operations and making personal observations
- Clarify and explain your request for information
- Receive electronic and hard copy files in a user friendly manner



# Visit identified sources

**Benefits of visiting identified sources**

- Reviewing additional information available at the source
- Get any questions answered
- Identify the potential of informational sources that can be utilised at a later date
- Recording interviews and taking photographs or other recorded images



# Establishing industry networks

**Benefits of visiting identified sources**

- Developing your own industry network
- Networking with industry colleagues



# Assess practicality of products and services

**Assess applicability of identified products and services to proposed packages**

Once you have conducted research and collected a range of possible products and services for inclusion in a tourism package, it is important to assess where they can be included from a practical perspective:

- What needs to be considered from a ‘practical’ point of view?



# Assess practicality of products and services

**Assess applicability of identified products and services to proposed packages**

- Determining rates, costs, fees, charges, taxes for each package component
- Evaluating availability on a short-term and on-going basis, as required by the nature of the package
- Calculating return on investment, including consideration of loss leader implications



# Assess practicality of products and services

**Assess applicability of identified products and services to proposed packages**

- Assessing compatibility with company image and reputation
- Verifying reputation of products and services, including assessment of client perceptions in relation to potential carriers, suppliers, destinations, products and services
- Identifying features and benefits, including comparisons with similar packages offered by competitors



# Assess practicality of products and services

**Assess applicability of identified products and services to proposed packages**

- Checking match between products/services and identified objectives and client demand/requests for the package
- Determining destination characteristics
- Understand local laws and regulations
- Cultural considerations
- Meeting special needs



# Select final products and services

**Activities associated with selecting products and services**

- Identify list of final products and services
- Identify suitable suppliers
- Aligning with identified objectives
- Complying with client requirements
- Ensuring availability of products and services
- Negotiating agreements with suppliers, providers
- Organise supply of components and, where required, confirm agreements in writing



# Select final products and services

**Activities associated with selecting products and services**

- Ensure specific inclusion descriptions and cancellation policies are confirmed with the supplier
- Check and incorporate legal requirements for offering and promoting packages
- Present pricing structures to clearly indicate all inclusions and exclusions and add-ons
- Finalise and confirm details in writing
- Ensuring value and potential saleability



# Identify types of suppliers

**Types of suppliers**

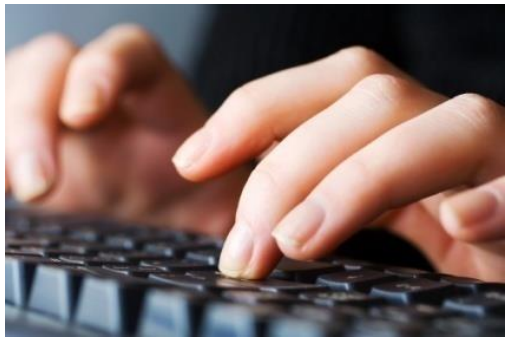
- Principals/suppliers
- Wholesalers/ tour operator
- Inbound tour operators
- Airlines, coach companies and rail
- Retail agents
- Ticket consolidators
- State and regional tourism authorities
- Conference, event and incentive companies



# Existing agreements with suppliers

**Consider existing agreements and preferred suppliers**

- A preferred agreement is a formal commercial agreement between a supplier and a travel agent which facilitates the payment of extra commission and other benefits by the supplier to the travel agent in exchange for the travel agents agreement to sell the suppliers product



# Role of suppliers

**Identify role of suppliers**

- Selling destinations you need
- Selling transport you require
- Selling accommodation style you require
- Selling the appropriate level of comfort and inclusions your client needs
- Having competitive prices and offering value for money for your client



# Role of suppliers

**Identify role of suppliers**

- Having a reputation for reliability, efficiency and easy payment
- Provide quality documentation
- Employ helpful and knowledgeable staff
- Pay competitive agent commission
- Have local representation



# Identifying suppliers

**Activities in identifying appropriate suppliers**

- Identifying client requirements in terms of products and services
- Collecting information as to whom provides these products and services
- Identifying suitable suppliers
- Assessing alternatives against the identified requirements for the quotation



# Identifying suppliers

**Activities in identifying appropriate suppliers**

- Evaluating the alternatives against the given criteria for the quotation
- Accommodating host enterprise requirements in relation to the use of preferred suppliers, providers and carriers
- Aligning with established client preferences and individual client market research data/feedback
- Determine and select suppliers, providers and carriers to be provided as options to the client



***COMPLETE ACTIVITY 9***

# Element 3:

## *Create packages of products and services*



# Create packages of products and services

Performance Criteria for this Element are:

- Identify pre-planning requirements for packages
- Determine components of individual packages
- Determine duration for packages
- Calculate price points for packages



# Create packages of products and services

Performance Criteria for this Element are:

- Develop terms and conditions for the packages
- Prepare draft itinerary for packages
- Prepare sales monitoring arrangements for packages
- Plan marketing activities for packages



# Pre-planning for packages

**Importance of pre-planning**

As seen in previous sections, there are a number of considerations that must be taken into account before the final tourism products and services for a package have been selected:

- What needs to be planned when constructing packages?
- How should this information be recorded?



# Pre-planning for packages

**Importance of pre-planning**

This section will focus on how to gather and record product information gathered for the inclusion in packages.

Information relating to final travel packages are often given to clients to help them decide suitable travel arrangements in the form of:



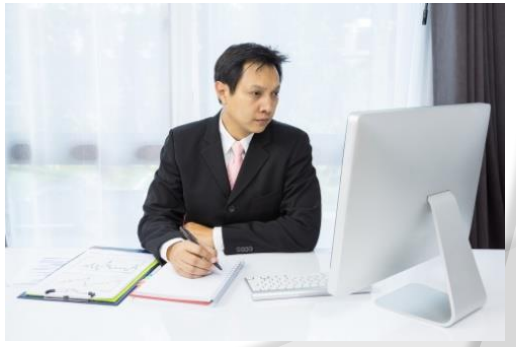
- Quotations
- Itineraries

# Recording packaging information

**Purpose of having recording methods**

Most travel agencies will use a combination recording system to record:

- Customer detail
- Supplier quotations
- Travel agency quotations



# Recording packaging information

**Recording method considerations**

- Customer requirements
- Information sourced to date
- Information provided to customers to date
- Communication discussions taken place to date



***COMPLETE ACTIVITY 10***

# Planning package components

**Types of considerations**

- Preferences
- Budget
- Time constraints



# Packaging steps

**Steps in creating packages**

- Identify the target group
- Determine the theme of the tour
- Now that you have your theme, establish objectives
- Choose a title
- Determine the length of the tour



# Packaging steps

**Steps in creating packages**

- Create a tentative itinerary
- Finalise the schedule
- Arrange and confirm supply
- Presentation of price
- Present your packaged program



# Package components

**Determine package components**

- Destination attractions
- Destination facilities and services
- Accessibility of the destination
- Images of the destination
- Inclusions and exclusions
- Price to the client



# Package components

**Destination attractions**

- Natural attractions
- Built attractions
- Cultural attractions
- Social attractions



# Package components

**Destination facilities and services**

- Accommodation
- Restaurants, bars and cafes
- Transport at the destinations
- Sports/activity
- Retail outlets
- Other services



# Package components

**Accessibility of the destination**

- Infrastructure
- Equipment
- Operational factors
- Location to major attractions and amenities



# Package components

**Images and perceptions of the destination**

- The attitudes and images which clients have towards products strongly influence their buying decisions.
- Destination images are not necessarily grounded in experience or facts but are powerful motivators in travel and tourism



# Package components

**Inclusions and exclusions**

What products and services are included or excluded in package prices can greatly influence the decision to purchase.

- Inclusion
- Exclusions
- Add-ons
- Available options, including substitutions and alternatives



***COMPLETE ACTIVITY 11***

# Determine package duration

**Factors affecting the duration of packages**

Commonly, the duration of a package will be determined by:

- Client
- Suppliers
- Other influences



# Determine package duration

**Duration factors determined by the client**

- Their budget
- Designated dates
- Preferred destinations
- Preferred products and services



# Determine package duration

**Duration factors determined by suppliers**

- Schedules of set tours
- Schedules of travel suppliers
- Supply and demand
- Supplier booking conditions



# Determine package duration

**Duration factors determined by other influences**

Whilst there are an endless amount of influences affecting package durations, some of these include:

- Timing of specific events
- Seasonality



# Determine package duration

**Determine duration of packages**

This process will include:

- Formulating packages to accommodate differing timelines
- Checking availability of products and services
- Adding and removing inclusions
- Providing alternate dates, suppliers or routes
- Complying with agreed arrangements



***COMPLETE ACTIVITY 12***

# Calculating price points for packages

**Calculate costs for products and services included in a quotation**

- Once products and services required for inclusion in a quotation have been identified, it is now important to accurately determine the costs



# Calculating price points for packages

**Activities associated with calculating costs of products and services for packages**

- Ensuring comprehensiveness and accuracy of all information provided
- Taking into account price point considerations
- Negotiating costs with suppliers, providers and carriers to obtain optimal prices
- Identifying direct costs
- Calculating commissions
- Calculating mark-up net costs
- Identify organisational fees



# Calculating price points for packages

**Activities associated with calculating costs of products and services for packages**

- Applying host enterprise procedures
- Including all taxes, fees and other charges
- Incorporating currency conversions
- Factoring allowable discounts
- Considering and including package deals
- Taking into account seasonal and other premiums
- Estimations based on current year prices



# Calculating price points for packages

**Costing price point considerations**

- Analysing prices offered by competition
- Determining target market affordability
- Ensuring required profit to host enterprise
- Identifying what the market will bear
- Developing price schedules, including special rates and discounts
- Determining host enterprise costs pertaining to package development and delivery
- Factoring in commissions



# Calculating price points for packages

**Negotiate costs with suppliers**

- The gross price
- The commission
- The Nett price
- The currency
- The method of payment
- The deposit amount and deadline



# Calculating price points for packages

**Negotiate costs with suppliers**

- The final payment deadline
- The cancellation or amendment fees
- The allocation of seats / rooms / cabins
- The release back date for unsold allocations
- The deadline for final passenger names / numbers



# Calculating price points for packages

## Identifying direct costs

Direct costs include component costs for all tourism products and services included in the package.

- Accommodation
- Meals
- Transfers
- Amenities/entrance fees
- Equipment hire or use
- Wages / fees



# Calculating mark up and commissions

**Calculate mark-up nett costs and commissions to determine a profitable selling price**

How do you determine:

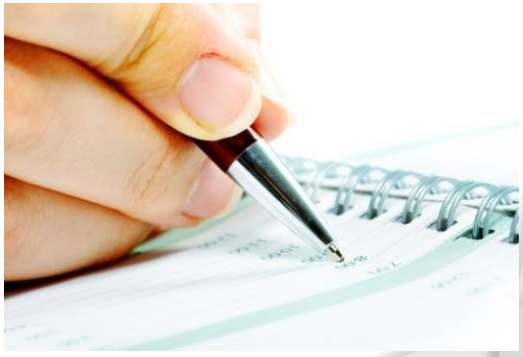
- Appropriate mark-ups
- Commission levels



# Identify organisational fees

**Identify organisational fees**

- Flight booking
- Frequent Flyer redemption booking
- Itinerary planning
- Land only booking
- Reconfirmation of airline reservations
- Passport/visa assistance
- International fax/phone calls
- Late booking fees
- Amendment fees
- Cancellation fees
- Credit card merchant fees



# Calculating additional costs

**Accurately calculate any additional taxes, special fees and other charges**

What are examples of:

- Taxes
- Special fees
- Other charges



# Calculating currency exchange

**Accurately calculate any required currency conversions**

- How can you identify currency of different countries?
- How may this vary between quotation and booking?



# Calculating supplier costs

**Securing quotes and costs from suppliers**

- What are general considerations when securing quotes and costs?
- What information do you need to secure quotes?
- What arrangements need to be made to secure quotes?
- How can you identify final supplier details and costs?



# Calculating supplier costs

**Check all calculations against all product and service components**

Prior to providing the customer with a quotation you must check all your calculations in relation to the prices secured.

The process of collating and pricing the itinerary must include:

- Checking the detail of the products and services
- How these have been priced



***COMPLETE ACTIVITY 13***

# Terms and conditions

**Identify terms and conditions**

All quotations will come with terms and conditions that will apply to various aspects of travel arrangements.

Terms and conditions may be provided by:

- The travel agent themselves
- Suppliers
- The  individual product or service provider



# Terms and conditions

**Types of terms and conditions**

- Terms and methods of payment
- Dates for payment of deposits and final payment
- Notifications regarding final confirmation of the booking
- Cancellations and penalties and charges that apply
- Procedures and charges that apply to name and date changes for the booking
- Guarantees and warranties that apply to the products and services covered by the quotation



# Terms and conditions

**Types of terms and conditions**

- Exclusion and limitation of liability clauses
- Identification of the period for which the quotation is valid
- Whether or not the quotation is subject to change with or without notice
- Reference to associated terms and conditions as imposed by third party providers
- General industry rules, regulations and codes



# Booking conditions

**Booking conditions**

- How to book – who to contact
- Amount of deposit required
- Prices and validity
- Assumption of risk
- Exclusion of liability
- Payment deadline
- Ticketing deadline



# Booking conditions

**Booking conditions**

- Extension ticketing deadline
- Cancellation by the supplier
- Force Majeure
- Cancellation by the travel agent
- Cancellation charges
- Availability of any type of change to booking



# Booking conditions

**Booking conditions**

- Availability of changes to class of booking
- Types of booking amendments
- Amendment fees
- Complaints
- Authority of suppliers and tour leaders
- Baggage allowance



# Booking conditions

**Booking conditions**

- Excess baggage charges
- Health, fitness and age limits
- Publicity
- Privacy
- Governing law



# Terms and conditions

**Travel Agent Terms and Conditions**

They will commonly include terms and conditions relating to:

- Deposit and how to book
- Payment Options
- Amendments
- Final Payment
- Cancellations and refunds



# Terms and conditions

## Supplier Terms and Conditions

It is important that all supplier, wholesaler, operator conditions are highlighted to the customer together with your own travel agent terms and conditions:

- What are examples of supplier terms and conditions?



# Terms and conditions

**Product or service provider terms and conditions**

Individual product or service providers will often have a set of terms and conditions relating to their particular product or service.

These will cover, among other items:

- Pricing policy
- Payment conditions
- Inclusions
- Exclusions
- Any restrictions or limitations



***COMPLETE ACTIVITY 14***

# Prepare package quotation & itinerary

Now that all the vital information relating to products and services required for inclusion in a quotation have been compiled, it is now time to prepare the:

- Quotation
- Itinerary



# Prepare quotation

**General quotation details**

- Date of quotation and reference number
- Clients name
- Phone contacts and fax
- Email address
- Address
- Month of travel
- Length of travel and class of travel
- Flight details



# Prepare quotation

**General quotation details**

- Tours
- Accommodation
- Transfers
- Inclusions and exclusions
- Insurance details
- Payment requirements and cancellation fees



# Prepare quotation

**General quotation details**

- Conditions of the quote
- Deposits required
- Service fees
- Expiry date of the quotation
- General conditions and rules



# Prepare quotation

**Specific quotation details**

What information would be included in a quotation for the following required products and services:

- Flights
- Accommodation
- Car hire
- Cruises
- Tours
- Transfers
- Insurance



# Prepare itinerary

**Prepare itinerary**

- The itinerary describes the traveller's route and direction of travel
- It lists travel arrangements in the date of order that they are taken, and often lists them day by day
- All of the places visited by the traveller are included



# Prepare itinerary

**Prepare itinerary**

The itinerary will detail, in chronological order:

- Destinations
- Day destinations
- Attractions, tours and sight-seeing
- Arranged activities
- Times



# Prepare itinerary

**Prepare itinerary**

- Transport
- Transfers
- Accommodation
- Meals




***COMPLETE ACTIVITY 15***

# Monitor sales

**Importance of monitoring sales**

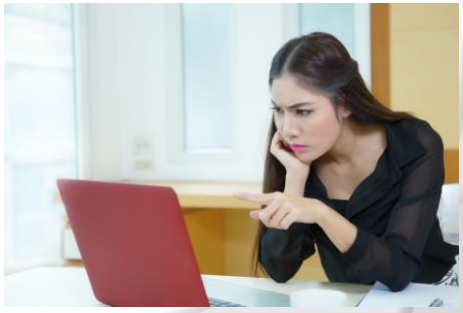
- Analysing and monitoring sales regularly is an important aspect of any management role
- By analysing sales performance, management can see clearly the direction in which our sales are headed, what has been successful and how we can adapt to increase the sales of specific packages and packages in general



# Monitor sales

**Preparing to monitor sales**

- Establishing facilities to record enquiries in relation to packages
- Establishing internal systems to record package sales, including location of sale, seller, commissions and options selected
- Arranging for sales data to be forwarded from related businesses



# Monitor sales

**Sales monitoring activities**

- Evaluating the results of different sales activities with reference to the nominated key performance indicators and sales objectives established by the organisation
- Identifying the sales turnover achieved by our sales team
- Track the performance of our sales team and develop appropriate strategies to help them perform better
- Evaluating the sales performance of individuals in the organisation
- Determine trends in sales and consumer preferences



# Monitor sales

**Sales monitoring activities**

- Distinguish between strong and weak products / services
- Better understand the performance of our products and services and determine how to exploit their strengths and enhance their weaknesses
- Evaluating the success of different packages advertised to clients



# Monitor sales

**Sales monitoring activities**

- Identifying satisfaction level of clients who have undertaken packages prepared by the organisation
- Identifying innovative package suggestions
- Make better sales forecast and set more realistic sales targets in future



# Monitor sales

**Sales evaluation activities**

- Interviews with staff and customers
- Comparison of actual sales or revenue statistics with expected or target figures
- Analysis of data collected
- Review of the budget
- Consideration of ancillary benefits and problems that arose



# Monitor sales

**Determining what data to collect**

- Quantitative data
- Qualitative data



***COMPLETE ACTIVITY 16***

# Plan marketing activities

**Marketing planning activities**

- Identify marketing objectives
- Identify marketing and sales activities
- Training sales staff in relation to the packages
- Designing client feedback tools



# Plan marketing activities

## Identify marketing objectives

Whilst each organisation will have their own objectives, in line with the overall business plan, examples of travel and tourism marketing objectives:

- What are examples of  marketing objectives a tourism organisation would have?



# Identify marketing and sales activities

**Promotional methods**

- Personal selling
- Sales promotions
- Advertising
- Publicity
- Sponsorship
- Public relations



# Identify marketing and sales activities

**Promotional methods**

- Newsletters
- Special Events
- Community Relations
- Media Releases
- On-site tour
- Social media activities



***COMPLETE ACTIVITY 17***

# Training sales staff

**Training sales staff in relation to the packages**

Staff must be aware of:

- Types of packages
- Tourism products and services within the packages
- Promotions on offer regarding the packages
- Promotional and selling techniques to sell the packages



# Training sales staff

**Timing of training**

- Customer service deficiencies exist which need to be addressed
- New staff require training
- New packages are introduced
- New package products or services components are introduced
- Retraining is required



# Training sales staff

## Types of training events

Whilst training events traditionally are focused towards formal training, in essence can be classified as any activity that enables staff to improve their service delivery in the selling of tourism packages:

- What are types of training events that can be used to improve a staff member's understanding of packages?



***COMPLETE ACTIVITY 18***

# Client feedback tools

**Designing client feedback tools**

- What is the purpose of these tools?
- What formats can be used?
- What information should be included in these tools?
- What are considerations when designing tools?



***COMPLETE ACTIVITY 19***