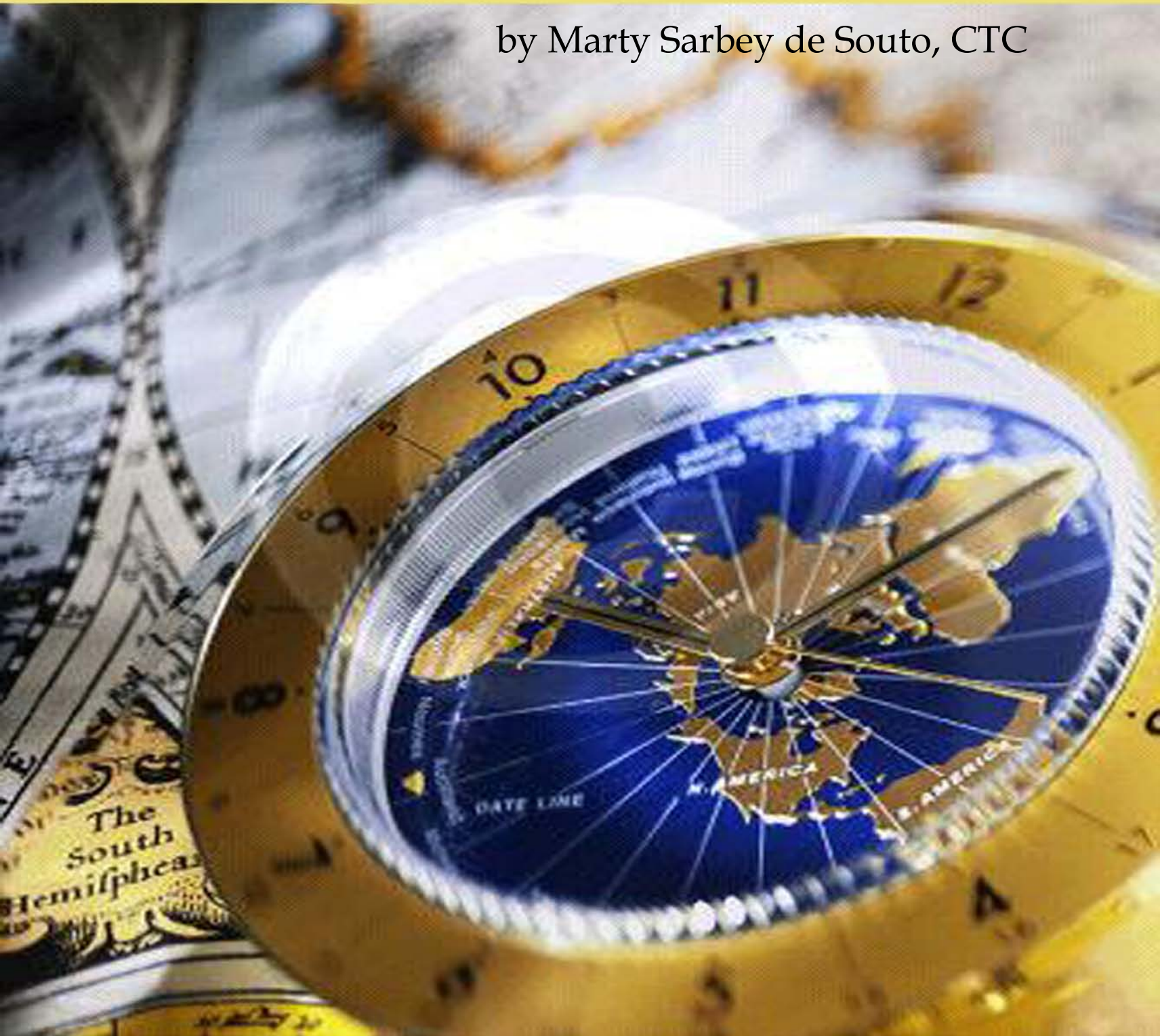


How To PLAN, OPERATE & LEAD SUCCESSFUL GROUP TOURS

by Marty Sarbey de Souto, CTC



Forward by Jeff Gayduk
President, Premier Tourism Marketing Group
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From the Publisher

My career in the travel industry started in the tour business. It's a business to which you quickly become addicted, and try as I might, I was never really able to leave the industry for greener pastures. Looking back at over 23 years in the business, I couldn't have possibly wished for more out of a career and lifestyle than what I've been afforded being a member of the world-wide tourism industry. This business is addicting, like chocolate!

In the late 1990s I noticed a disturbing trend developing among my tour customers. Born from time deprivation, multi-tasking and lack of industry knowledge, it seemed to me quite clearly that group travel organizers were more apt to take the path of least resistance by choosing inferior tour products sold by fast talking salesmen, or getting into a rut of running the same travel programs year after year after year.

I had an epiphany, so to speak. That, along with bit of good fortune, connected me to George Lowden, then the owner and publisher of Senior Group Travel. Three short months later I was in the publishing business.

With my newfound empire, I vowed that that I would make education a priority with my readers. Be it unbiased destination knowledge, or insightful how-to commentary by industry professionals, we were going to deliver content that helped people plan better group trips.

"Our Book"

In 2001, I became acquainted with Marty Sarbey de Souto, a columnist from a rival publication that I eventually acquired. Marty was the recognized expert on organizing and operating successful group travel programs, having written for Travel Tips magazine since the early 1990s. I welcomed Marty with open arms to our family and she's been a regular columnist ever since.

In the summer of 2003, Marty approached me with the idea of creating a book on what it takes to become a successful group travel organizer and leader. Affectionately titled "our book" we exchanged emails, sent manuscripts and tried to get our arms around this idea. Ultimately this project took three and a half years to get off the ground, finally launching in 2007. In the meantime, the group travel industry has changed and grown, so a second editing was commissioned in late 2010.

I hope you enjoy How to Plan, Operate and Lead Successful Group Trips.

Good planning,

Jeff Gayduk

Publisher

Premier Tourism Marketing Publications



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A big thank you to Elana Andersen who first published many of these columns in her West Coast magazine, *Senior Travel Tips* and subsequently to Jeff Gayduk and John Kloster of *Leisure Group Travel* who worked with me to bring my vision of this book to fruition.

But beyond that, I'm cognizant of all that I have learned in over 40 years of operating and escorting group travel programs world-wide. My association with thousands of willing travelers and innumerable travel industry colleagues over these many years of my travel career, has made this book possible. I'm also indebted to those numerous travel industry students whom I've been lucky enough to train in nearly 30 years at Berkeley City College. And I'm grateful to The Travel Institute for all I've learned through their Certified Travel Counselor (CTC) program and my relationship with them through the years as well.

I'd also like to give a nod to the memory of my mother who dragged me at age 13 on my first international trip and taught me that we are all inhabitants of a one-world family, no matter where we may live or what language we may speak. It was she who instilled in me the notion that travel is *the* great educator of our times and that we owe it to others to make this big world available to them via travel programs for all.

Lastly, a loving thank you to my husband, Jose, who has put up with my traveling lifestyle over these many, many years of marriage.

Marty Sarbey de Souto, CTC
Winter 2011





Marty Sarbey de Souto, CTC

The author grew up in Cleveland, got her start in the travel business in 1954 as a student tour operator in Manhattan, and has continued her travel career in Berkeley, California to the present day. She holds a B.A. degree in Journalism from the University of Arizona at Tucson and the Certified Travel Counselor (CTC) designation from The Travel Institute in Wellesley, Mass.

Her industry field of specialization is group travel. Through the years, she has worked in all phases: tour operations, itinerary design, trip costing, marketing, and tour directing in the field.

In 1978 she initiated the travel and tourism program at Vista Community College, now known as Berkeley City College, in Berkeley, California where she directed their travel/tourism program for 32 years, designing the curriculum and actively teaching such courses as Travel Sales and Customer Service, Adventure Travel, Travel Writing, Special Interest Travel, and Destination Studies of Europe and Latin America.

Her first book entitled *Group Travel* was published in 1980 and has served as a textbook at many colleges throughout the U.S. and abroad. The individual articles in this new e-book first appeared as monthly columns in *Leisure Group Travel* magazine and its earlier west coast affiliate, *Senior Travel Tips*.

Marty has been affiliated with travel industry organizations Pacific Asia Travel Association (PATA) and Women in Travel. She is a two-time former President of San Francisco Women in Travel (now called San Francisco Travel Professionals).

She lives in El Cerrito, California with husband, Jose Souto-Martinez of Buenos Aires, Argentina. Her hobbies are dancing, gardening, reading, writing, and of course, traveling.



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CHAPTER ONE

Becoming A True Travel Professional

Welcome! If you are involved in some aspect of group travel, this e-book is for you.

You may be the travel coordinator for a club, a religious or sports organization, perhaps a bank or business enterprise. You might be the owner of a new small tour operator company or a travel agent interested in selling groups. Perhaps you're an individual intrigued with the idea of putting together a family reunion trip or getting together a group of friends for a tour or cruise.

You might be the social director at a senior center, considering including a trip or two in your annual calendar of activities. You might even be a student in a travel and tourism study program at your local college.

But, whomever you may be, if you are involved in planning, promoting, and escorting any sort of group travel, then this book is the guide for you. It will show you what's involved in handling group travel and how to do it in a professional manner. Please join me on this exciting journey.



Talking Like a 'Travel Pro'

One way to increase your professionalism is to learn the language of travel and tourism. Over the years the industry has developed a very definitive language, generally understood by those within the industry, but often not clearly understood by outsiders.

Learning to use this terminology will serve you well. First, it will help you avoid misunderstandings with your suppliers—the tour operators, cruise lines, airlines, hotels, and motorcoach companies—that you use for your trips. Second, it will convey to your suppliers that you are one of them, a true professional in the travel industry.

General Terms

While there are certain terms specific to only limited sectors of the industry, there are a number of terms pertinent to all sectors. For example, the terms *gross*, *net*, and *net net*. *Gross* refers to commissionable rates; *net* is the fare after the commission has been deducted. *Net net* is the gross less the commission plus any taxes or other fees.

Review dates refer to the dates the supplier will contact you to see how much of the space you hold has really been sold and how much you think may still sell. On these dates, usually 90, 60 and 30 days before departure, the supplier may take back the space allotted to your organization if it appears you are not filling it.

Complimentaries means free. Other similar terms are *comp* or *tc* for tour conductor. Europeans quite often use the letters *FOC* for Free of Charge.

Cruise Line Terms

No matter how much of a novice you may be, please let the cruise line know that you know the front of the ship is *bow* and the rear is *aft*, *port* is the left side and *starboard* is the right. Sleeping rooms are *cabins* or *staterooms* and *embarkation* refers to getting on, while *disembarkation* is getting off.

Midsize and larger vessels are called *ships*, never boats, whereas smaller river vessels, yachts and the like, may indeed, be referred to as *boats*.

An *allotment* refers to a group of cabins the cruise line offers for free-sale up to a specified date—usually what's referred to as a *spread* with one or two minimum priced cabins and perhaps one or two top-of-the-line cabins and then some at various price levels in between.

Watch for terms like a *guarantee*, meaning that the cruise line promises to give your client a specific type of cabin and price level, although at the moment of confirmation they cannot assign a specified cabin number or location. Know the difference between a *porthole* (small and round)



verses a *window*. *Air/sea cruise* means that you fly one way to the ship and cruise back or vice versa.

Theme cruises may mean that the cruise you have selected is designated a country-western or classical music sailing, and *enrichment programs* refer to onboard lectures. Be wary of a new ship's *maiden voyage*—a nice way of saying “shake down cruise”—which can often be delayed or can have difficulties as the staff becomes accustomed to the ship and to working together.

Be sure you know the various shipboard personnel and their responsibilities, especially the *purser, cruise director and shore excursion director*.

Hotel Accommodation Terms

In dealing with the accommodations sector (anywhere you sleep: hotels, motels, resorts, etc.) many terms are standardized. A *twin* is a room with two single beds; a *double* is a room with one double bed that can sleep two (in Europe sometimes euphemistically called a *matrimonial bed*).

Then there's a *king*, a *queen* and at some hotels like Holiday Inns, a *double double* (two double beds in one room, originally designed for families). Suites have a sleeping room and a “sitting room” and *junior suites* have one big room with a sleeping area and a sitting area.

Terms for the Airlines

The airlines have literally hundreds of terms, definitions, and codes—most of which you should not be expected to memorize.

Professional travel agents and airline employees do memorize most of these in the course of their training and ongoing career. These include the two letter codes for nearly every airline and the three letter code for the most commonly used airports. (Airport codes website: www.world-airport-codes.com)

Since many cities have more than one airport nowadays, it's important to carefully note the code for each airport, not the city. For example, *IGU* is the code for Iguassú Falls in Brazil whereas *IGR* is for the airport on the other side of the falls in Argentina. A slip of one letter could bring a client to the wrong country, perhaps without the correct visa.

It is helpful if you understand certain key air travel terms. *APEX* refers to an Advance Purchase Excursion Fare (an excursion can only be roundtrip). The term *capacity-controlled* means a limited number of seats available on any one plane at a specific airfare. For example, certain very low “come on” fares may only allow 10 seats on the entire plane to be sold at that fare, even if there's space available on the plane as a whole. Certain dates when specific airfares do not exist are called *blackouts*—often during Christmas or other holiday periods.

Meal Terms

Meal terms can confuse the best of us. You'll see the initials *CB, AP, MAP, EP* and others. In Europe, *full pension (full board)* usually means three meals a day: breakfast as defined by that country plus lunch and dinner. Lunch and dinner are usually set menus or very limited selection menus. *Demi-pension, or half board*, refers to breakfast plus one other meal—lunch or dinner per the above. Often tour groups must eat together at a set time and in a specified room.



American Plan (AP) is the same arrangement this side of the Atlantic as *Full Pension* and *Modified American Plan (MAP)* is the equivalent of *Demi-pension*. *CB* means *Continental Breakfast* (a light breakfast with coffee, a croissant and perhaps juice). *EP* means *European Plan* and, strangely, means no meals. *A la carte* means open menu selection and is the trademark of very deluxe tours only.

Terms delineate very precise meanings, and it's the wise trip planner who takes the time to learn the language of tourism in order to do a better job.



It's Time to Get Organized!

As one travel season winds down and we look to the next, how many of you are truly organized and ready to start a new season with a running start? Do you have next year's trips in place? Do you have something for each of the various segments of your market? When was the last time you checked out your insurance, marketing plans, schedules for your volunteers and other in-office facets?

It's not too late. You still have time left to get ready for next year. But do it now rather than wait 'til after the first of a new travel year is suddenly upon you. Let's look briefly at a few of the areas you need to review if you're to be a truly professional group trip planner.

Successes

Now's the time to review your last year's trips and see which were successes and which were duds. By success, I mean successful in two ways: successful in bringing home lots of happy travelers and successful in the financial sense. Perhaps it's time to weed out a program that didn't live up to expectations or re-think how it can be changed to be successful next time. With new markets and new travelers with new expectations, perhaps the "same old trips" don't warrant another time around. Or perhaps they should only be offered on a two or three year rotation.

Your Personnel

Now's the time also to look at your trip leaders and in-house helpers (both paid employees and volunteers) to evaluate their contribution to your program. Maybe they deserve a year's end thank you—either monetary or in the form of a trip. If you rely heavily on volunteers, perhaps you need to review your understanding with them regarding their hours and what you expect of them.

Your Trip Leaders

Do you have your trip leader assignments set? Have you interviewed new applicants to keep your leaders pertinent to your changing membership? Do you have a "Letter of Understanding" with them so that their duties and responsibilities are clear? Are they prepared to handle emergencies?



Insurance and Legalities

Been a long time since you reviewed your insurance? Many insurance companies are withdrawing from the market, forcing operators to search for new insurance. You want to understand any insurance your organization has as well as review that of any vendors you are using for your program. The same goes for any travel insurance plans you are offering for sale to your travelers. Do they cover pre-existing medical conditions, terrorism and financial defaults?

Next Year's Trip Schedule

Have you booked most of your next year's trips? Have you reviewed them to see that you have a balanced program for your organization? You should probably have at least one short, inexpensive trip to attract newcomers. At the other end of the spectrum you probably need one trip for the more sophisticated, well-traveled individual who has already done Hawaii, the Caribbean, and much of central Europe. Perhaps something in the South Pacific, Asia, Scandinavia or South America. Your calendar should surely include at least one cruise—and not the same old seven-day Caribbean cruise every year. Also think special-interest—perhaps one trip for women only, one for food addicts, one soft adventure, maybe a river cruise. Spice up your schedule. Then publish an advance calendar, as your future travelers like to plan ahead.

Marketing Schedule

By what dates must you have your brochures and flyers ready to properly sell each trip? What about insertions in newsletters? Paid ads? Direct mail? Web-site or e-mail announcements? Most major international trips need a nine-month lead time—some shorter, domestic trips at least six months. Get ready! The time is now, not later.



"Fam" Trip Etiquette

Ah, "fam trip"...that magic phrase. A free (or nearly free) trip. Fun. A new destination. A chance to get away. Whoa!—not exactly. As the name implies, it's a trip to familiarize you with a particular destination, tour operator, or other supplier so you will rely on them for your future group business. It also serves to make you a more professional, knowledgeable, trip coordinator.

You may be receiving the trip on a complimentary basis or you may be paying for it at a much lower price than the public rate. In either case, many of your costs are being underwritten by the host suppliers.

Ask the Pros

I spoke to a number of tour operators to find out what they would expect if you were a member of their fam trip. Main Street Tours in Torrance, CA, invites many group leaders on fam trips. "We give preference to group leaders who have had successful groups with us previously or whom we believe have a great potential to bring us good future business. We require that our fam trip members participate in all planned activities and then, after each activity or hotel



inspection, they complete a written evaluation for us. We also insist that they be prompt for all activities and 'do us proud' with our suppliers by being attentive and gracious."

One Portland-based operator indicated they'll go as far as dropping someone from a fam tour if the person skips planned tour activities. "It's embarrassing for us to have someone not show up and discover they went shopping instead," she said. Another stressed the importance of truly listening when suppliers are speaking rather than chatting with other participants.

Other companies interviewed emphasized the importance of dressing appropriately, not drinking to excess and not discussing competitors.

Of course, you should be willing to rotate coach seating, meeting and mixing, and never demand that the airline or hotel upgrade you.

Many years ago, as a travel agent and tour operator, I was invited on a trip by Air France to celebrate their new service to Tel Aviv. The group was divided so that half would experience first class outbound, while the other would start in economy class and return in first class flight service. However, when we boarded the return flight, the first class seats were taken by VIPs including Elizabeth Taylor, Richard Burton, Charles Boyer, Pierre Salinger and others, so our group had to return in economy class. I was mortified when a person in our group complained constantly during the flight and tried to get the attention of the celebrities on board.

Ethical Responsibility

But what should we do when we genuinely feel that a travel product we have just sampled is not up to par and that we do not feel that we can promote it in good conscience? Probably the best solution is to thank the supplier, but later, in doing an appraisal of the trip, say that you will not bring them group business (and state the reason) until the situation can be rectified or improved.

Never accept a place on a tour just to enable you to see the place and then return home only to book a group with a competitive operator, or work directly with the suppliers, circumventing the operator with whom you traveled.

Unfortunately, many tour operators who used to offer many fam trips no longer do so. One reason is the reduction of free or reduced-rate space available to them, especially on flights. Another reason, some operators admit, is that fam trip invitations have been abused by those who come on a trip, then announce they have already booked a similar tour for their group on a competitive program.

All in all, the fam trip concept is important to all of us who benefit from it: group planners and leaders like you, as well as travel agents, travel press, and ultimately the suppliers who host participants in good faith. It's up to all of us to help keep fam trips professional, alive and well.





Tour Programming as a Career

At some time in our career, it's necessary that we sit down and decide what is the purpose of the trips we offer and then think further as to what is our role in bringing these travel opportunities to our participants. Are we doing this as a lifetime career? As recreation? For personal fulfillment?

Purpose of our trips

Let's ask ourselves: (1) Is our travel program to educate our travelers? (2) Is it to provide fun and enjoyment to those who might otherwise stay at home? (3) Is it perhaps to enlarge our participants' horizons and provide them with a more global outlook? (4) Or is it to provide a social opportunity for our travelers to meet new people and perhaps form new but ongoing friendships? (5) Is it to make money for our sponsoring organization – and perhaps ourselves also? (6) Could it be to obtain publicity for our organization so as to build its stature? (7) Is it to attract new membership to our traveling club organization?

Many motivations

All of the above can be viewed as legitimate reasons for our trips. But we then need to delve further and ask ourselves "Why am I here?" Am I here involved in this as a career, as a business? Am I here as a goodwill gesture to bring enjoyment, fulfillment and opportunity to others? Am I here because I love being involved in the world of travel – meeting people from other places and stretching my world knowledge? Am I here simply for the "free trips" that I manage to take and I just put up with all the work and headaches as a means to an end – travel for myself? Am I here because I actually work for a travel agency or tour operator and only do group tours as a part of my daily job?

I would guess that for many of us a combination of some of the above motivations may strike a chord rather than just one of them. I have come to realize that, as an educator myself, I enjoy spoon-feeding ongoing learning through travel. But I have also learned that on tour one cannot continually be teaching; your travelers want activity and fun and friendship woven throughout the day.

Learn about yourself

I've learned a lot about myself. I've learned that I enjoy designing the itinerary; the creative process is what turns me on. I do not necessarily enjoy escorting tours designed by others. I've learned that I can easily design and book tours to certain areas of the world that I know well but that for other areas I am not as well qualified and need to put my travelers on a travel product such as a cruise or tour from some company that excels in that area.

Lusting for travel

I've learned that I'd love to be able to have a successful career in travel, but that financially it can be a rough road to riches and very few "make it" as a financially-fulfilling life enterprise. I see



many involved in managing travel programs as a second career; these are the individuals who, upon retirement, and with a basic retirement income, can then turn their energies to what they really lust for – a life in travel. I've also seen those who have found a way to continue their present non-travel career but augment it with the occasional tour or tours during the year. Each of us will have our own motivations and we need to be clear about them. We also need to assess our individual strengths and weaknesses. We can then make the choices necessary and direct our travel programs accordingly for success.





CHAPTER TWO

Planning Your Organization's Travel Program

All group trips are not alike. Some are long, some are short. Some are local, some are international. Some may be budget level, others extravagant.

But one thing should be common to them all; they should be successful. And to be successful, you need to sit down and carefully map out a travel program for your organization (or the organizations you hope to handle).

This should be done a year in advance, not on the spur of the moment. This will allow you to make the right decisions for maximum trip success.

This chapter will give you some trip planning ideas for different types of trips "your organization" might enjoy.



Why Do They Travel With You?

As we start plans for a new travel season, perhaps it's a good time to assess *why* our travelers travel with us and what they expect from us. Their reasons may shape the decisions we make with respect to future trips we plan to offer. Over the years I've come to the conclusion that our travelers don't come with us just to travel for the sake of travel, but rather with many deep-seated emotions and hidden motivations. Here are the top ten I've noted.

- 1) **TO ENJOY** or indulge in plain, old-fashioned fun. Many of our travelers' lives are so full of career involvement, family obligations, financial intricacies and health issues that they often don't take sufficient time out simply to enjoy life. Travel takes them out of that equation; they give themselves permission to have fun while getting away.
- 2) **TO LEARN.** Many perceive travel as the great educational experience that it can and should be. Again, they give themselves permission to take the trip because it will be good for them and they will find it a learning experience.
- 3) **TO MEET NEW PEOPLE** and hopefully make new friends. Many may have lost friends or family members and are finding it difficult to fill the void that person left. Many trip participants may feel that their present circle of friends is limited and they will be exposed to new, future friends.
- 4) **TO FIND BETTER WEATHER** than that at home. For the snow-bound New Englander, it may be the winter getaway to Hawaii or the Caribbean. And for the southerner locked into another sweltering summer in Georgia, it can be the cool appeal of Alaskan cruise waters.
- 5) **TO GET AWAY FROM SOMETHING** or someone at home—to escape an untenable situation such as an illness or a disintegrating marriage. Sometimes they go away to give themselves some time during which they can make a decision, and return home ready to tackle it.
- 6) **TO APPRECIATE WHAT HISTORY HAS TO TEACH US.**
This can even be to look at their own family history and the heritage they've inherited.
- 7) **TO SEE HOW OTHER COUNTRIES AND CULTURES LIVE LIFE.**
They encounter many opportunities as they travel to learn how similar problems may be solved in different ways in the different countries and cultures they visit.
- 8) **TO SAVOUR BEAUTY**, be it natural scenery, art, glorious architecture or music. Beauty can be restorative to the body, mind and soul.
- 9) **TO TEST ONESELF** on the ability to be alone among others, to accomplish a life-long dream, or to go home with a feeling of accomplishment.



10) **TO EXPAND ONE'S HORIZON** by experiencing things for themselves that they've only heard of, read about or seen on TV previously.

These may be some of the unspoken reasons given for wanting to travel with you and, if you learn to read between the lines, you can shape your itineraries and train your leaders to fulfill these needs. Perhaps an itinerary needs to rush less and give time for contemplation, meeting locals, discussing issues. Perhaps a day at a spa, a picnic lunch around a BBQ pit, or an emotional visit to an orphanage can be woven into the planned activities instead of just visiting museums and cathedrals.

Maybe some skillful rotating of motorcoach seats or small-group Dutch treat dinner activities can facilitate new friendships. Tour leaders can be alert to the need to help tour members so that no one is ever feeling left out, snubbed, or abandoned. All in all, a group tour is a wonderful opportunity to bring change, contentment, and happiness into the lives of our tour members. Let's not waste it.



A Dozen Sources of Inspiration

Travel Magazines

I subscribe to Travel + Leisure, Condé Nast Traveler, National Geographic Traveler and Budget Travel. I also review trade publications such as TravelWeekly, TravelAgeWest and Travel Agent.

Sunday Newspaper Travel Sections

Particularly well-known travel sections appear in the New York Times, Boston Globe, Los Angeles Times and Washington Post.

Government Tourist Offices

These would be foreign government travel offices here in the U.S. (primarily in New York and Los Angeles). Domestically, they would be city convention and visitors bureaus (CVBs). Request their materials for information on lodging, restaurants, receptive tour operators, events and attractions..

World Events or Seasonal Activities

Consider spring cherry blossom season in Washington, D.C., New England fall foliage or the annual July Calgary Stampede. Then there's the Floriade in the Netherlands every 10 years (next up 2012) and Passion Play in Oberammergau, Germany (2020).

Family, Friends and Colleagues

Query your circle of friends, family and colleagues as to where they've traveled recently, what they've enjoyed and what they would NOT recommend. It's surprising what you can learn from those close to you.



Find Out What Your Competition Is Doing, perhaps not to copy them but so you won't be in competition with another local group. (Or why not consider teaming up with them so that both groups sell into the same trip, resulting in a better turnout.)

Contact Major Tour Operators to get on their mailing or e-mail lists. Be sure to pick companies that have been around a while and are reliable (such as members of USTOA or NTA), not just the least expensive company you notice on the Internet.

Contact Major Cruise Lines and ask to be put on their mailing and e-mail lists. For starters, you can get a list of the 23 member lines in Cruise Lines International Association (CLIA) at cruising.org. Be sure to contact not only companies offering ocean cruises but those with smaller vessels for river cruising.

Conduct a Survey among those who've traveled with you in the past and also to those who never have traveled with you. How long can they be away? What's their budget?

Dig Deep Into Your Personal Travel Experience. Where have you traveled that you've really enjoyed and think others would too?

Read, Read, Read. I read at least 30 minutes every night before I go to sleep, often much more. I'm an eclectic reader: fiction, non-fiction, American authors, foreign authors in translation. I also belong to a book club that meets monthly.



Planning Your Annual Calendar of Trips

You're into a travel season, and, hopefully, you're looking forward at a total year's calendar of pre-planned trips. Not there yet? Then it's time to get serious about advance planning. Advance planning helps you (and your potential travelers) to get focused. It assures you that you have arranged for a balanced and attractive annual program with something for everyone. And potential travelers like to know when you're doing what so they can schedule their vacations accordingly.

A Balanced Travel Program

Booking your trips over a year in advance helps you to think what kinds of trips you need to keep your travel program healthy. Present members need to remain happy. New travelers need to be brought into the fold. And some new and exciting program you've never tried before needs to be brought into the mix to satisfy those been-everywhere members.



Your annual program needs to have balance—one or two short trips at modest cost to attract newcomers and also to satisfy those on your list who cannot be away for longer. At the other end of the spectrum, you need to offer one really unique, exotic kind of trip that will appeal to the adventurer. It could be an Antarctica cruise, a Costa Rica eco-tourism trip, or an archaeological trip to the Mayan ruins of the Mexican Yucatán.

Be sure you have one stay-in-one-place kind of trip. A week in one hotel in one destination, with daily side-trips in and out is a wonderful way to operate a trip. It offers participants the option of taking the daily trip offerings or not.

Plan to have one or two cruises on the calendar. One might be your “quickie weekend”—a short cruise to Nassau from Florida or one from Los Angeles to Ensenada. The other should be a longer, distinctive cruise. How about a summer cruise through the Norwegian fjords? What about a river cruise, be it the Mississippi here at home or something farther afield like the Danube? Cruising is an ideal option—not a lot of packing and unpacking or standing in long lines at airports.

Consider one special-interest trip. It might be a theater week in New York or London. It could be a cooking trip to Italy or southern France. I’ve had luck with women-only trips, incorporating a number of activities of interest to women into one trip.

Marketing Issues May Dictate Selection of Trips

Part of your decisions should be based on focused marketing issues. You may feel that many of your participants are becoming too elderly to travel comfortably and you want to attract younger “boomers.” Or perhaps you already have a broad mix of ages in your group and you’re wondering how to provide a trip that’s of interest to all ages. If you offer a more active trip, and if it’s planned around a vacation schedule maximizing weekends, it will automatically draw those who are still active in the workplace.

Your written material for this market needs to be written somewhat differently. You’ll want to mention the active features. You may wish to change your terminology. For example, boomers who grew up on independent travel and who may view tours as rigid and boring may prefer verbiage that calls them travel programs rather than tours. You’ll want to emphasize the continuing education aspects, the free time for independent interests, or the gym at the hotel.

Decisions, Decisions

Lastly, you’ll want to make decisions as to whether to buy your trip from a tour operator or whether you want to try to handle the operations of the trip yourself, booking everything direct. There are advantages and disadvantages to each method.

If you are a travel industry “pro,” perhaps you are comfortable booking it all yourself. In this scenario, you design the itinerary, cost and price the trip, and handle all operational details as well as marketing it.

If you do not have extensive experience in tour operations, it’s probably best to have a tour operator handle it for you, with them doing all the operations and you concentrating on the marketing aspects. You can still have them custom-design the trip for you or you can buy one of the operator’s published tours “off the shelf.”



This will save you endless hours of work and though you may think it's less expensive for you to do it yourself directly, you'll find that tour operators usually have bulk rates with hotels and others that are hard to beat. You may also feel more comfortable knowing they carry adequate insurance and that by buying through a U.S. based operator, should something go wrong, you don't have to go overseas to sue in foreign courts!

All in all, plan your travel program as a whole, not piecemeal as you go through the year. You will be glad you did.



The Many Merits of Single-Destination Tours

Whether you call them one-stop tours, a spoke-and-wheel trip, a hub-and-spoke trip, or a “drop” (as in “dropping” you somewhere and leaving you there), the concept is the same. These are trips that stay in one place for the length of the trip, making daily excursions out and back to that same place each day.

Some companies call them “Stay Put” tours, others may use the term “Getaway” as in London Theater and Shopping Holiday Getaway, or sometimes “City Stays” or “Leisure Style Vacations.”

But it doesn't really matter what you call them; the concept is the same—usually a week or sometimes even more in one hotel, in one destination.

Advantage or Disadvantage?

But why should you consider such trips for your organization? Why spend so much time in just one place when there are so many exciting places out there for us to discover in life? Won't your travelers feel that they are getting their money's worth if they don't see a lot of places on a trip? Won't they want fuller days of traveling from place to place in order to feel it's a real “tour”?

Not at all. Not if you plan the trip carefully, or work with a tour operator who is already skilled at operating this kind of a trip. Not if you plan a trip that has proper pacing and an interesting mix of activities.

So, what are the advantages of such a trip over the traditional move-along itinerary wherein you may visit a number of destinations, staying overnight in different hotels every few days? There are many, many advantages that are particularly appealing to the adult traveler.

First of all, like a cruise, you unpack once when you arrive at your destination hotel and you pack at the end of your stay when leaving for home—no constant packing and unpacking as you move from town to town and hotel to hotel.



Less time is spent in transit on a coach, driving from one point to another. Once you're there, you're really there! The time is yours for daily activities in and around your destination point.

In-depth Touring

A trip of this sort really allows tour members to get to know one city in depth, including the city center, the suburbs and the surrounding points of interest on various daily excursions. It also allows for evening activities, exploring a variety of restaurants, theaters, social activities and cultural events in a city. They go home feeling really knowledgeable about a place, rather than that they just skimmed the surface.

This is an ideal method of travel for those who may not be in the best of health or may have limited energy. This kind of pacing allows participants to stay healthy, get adequate rest and find time to take their vitamins or perhaps do their daily exercises without feeling rushed. Folks can come back to the hotel to rest up between activities. And for couples or friends traveling together, one might wish to participate in an activity while the other one stays at the hotel and relaxes, but both meet in time for dinner. One-spot trips also provide that feeling of familiarity. Travelers get to know the hotel and perhaps its personnel. They get familiar with the coffee shop and its menu. They get to know the neighborhood and perhaps even feel a part of it.

Also, such a trip gives one a bit of time for the little things: a manicure, a shampoo, doing some hand laundry, writing a few postcards or shopping for a few well-selected gifts to bring home to that special friend or grandchild.

A well-planned single destination trip can also go beyond traditional "touring" and can instead include some special educational features so often of interest. Here's an opportunity for a behind-the-scenes theater visit, a cooking class, a lecture, a visit to a school, or perhaps a get-together with a local group of similar interest.

Daily Pacing

Proper itinerary planning is important. Each day should be scheduled to include some activities and some free time. Active and passive events should be interspersed. A night when one is up late for a show or other evening activity should be followed by a late start the next morning. And there should be optional activities that each participant can choose, depending on interest, energy level, weather, amount of walking or standing involved and other criteria.

You might also ask your tour operator to augment the basic package with such things as, for example, the Visitor Travel Card in London or a booklet of vouchers for individual shopping or dining discounts. Many cities have such offerings designed for the independent traveler, but welcomed by group tour members as well for use during their free time.

One of the nice surprises of this kind of endeavor is that you may find you're getting new folks in your travel program—folks who feel more comfortable on this type of a trip. As we all know, there are some for whom the word "tour" is a dirty word. They'll often tell you they don't like to go on tours (they envision them as very structured and confining).

However, a single-destination trip may prove more appealing as they'll feel they don't have to do everything with the group and that they have more free time to pursue their individual interests, whatever they may be. Think about it. Try it. You may like it!





A New Year, A New Look At Travel Planning

As we get into selling and operating present trips, we are also now planning for next year and beyond. A recent poll of many of our group leaders indicates that most of you plan your major international trips at least a year in advance, your cruises an average of 10 months out, and your one- to three-day trips about four months ahead. For those of you who are following this kind of planning schedule, I commend you. I find also that it's often quite useful to plan even the short trips earlier and to actually lay out a matrix of a two-year plan with an eye to overall balance and maximum marketing possibilities. The farther in advance you can publish trips—or at least destinations—the better. This helps your potential travelers to set dates aside and budget for the trips they want to take. Here are a few more travel planning hints I've found useful through the years.

For the First-time Traveler

Have at least one trip on your year's calendar for novice travelers with limited experience. Conversely, include one trip which will appeal to very experienced travelers who have been everywhere and are looking for new horizons.

Don't Compete with Yourself

Don't run two similar trips or two which compete for the same time frame.

Twelve Month Calendar

Every year's calendar should include at least one cruise, because they are so popular, but you don't always need to offer the same type of sailing. Cruises range from a three-day budget mini-cruise from Los Angeles to Ensenada to an adventure cruise on the Amazon to a deluxe cruise to exotic ports. Also consider a combined cruise/land tour. Typical in this category is a Bahamas or Caribbean cruise coupled with a Florida land package. Several lines offer these programs already pre-packaged. One year, I inserted a short Danube cruise into a Vienna/Prague land tour and it was a great hit. The cruise portion of a trip lets passengers relax, as well as enjoy the faster pace of a land tour.

Make Them Beg for it

Just because a certain trip was a roaring success this past year, don't assume you should offer it again next year. Wait two years and build up a backlog of folks who want to go. And the second time around, include new features as well as the old favorites. That way, you appeal to repeaters as well as first timers.

Include Outsiders

Designate one trip as a "special" for bringing along friends, relatives and other newcomers. Your costing and negotiating goal for this particular trip should be to offer "second person at half price" or "two-for-one" to encourage more travelers. It also can boost your membership list.



Plan a Cooperative Effort

Once a year or more, schedule a trip with another organization in a neighboring town, or one that shares a common interest, thus increasing the base of potential tour participants.

Consider Theme Trips

Survey those on your mailing list to determine their special interests. You may have done a trip to Italy before, but how about a new trip focused on Italian food and wine? Or England for gardeners? Or New York for theater? You probably already work with tour operators who operate general tours but may specialize in a certain geographic area. Did you know that there are also those who specialize in things such as theater tours, opera tours, agricultural tours, garden tours and so forth? One resource is specialtytravel.com, a listing of operators by interest/activity and geographical area. Besides special interests, world events are also worth considering as a focal point for trips. For example, the Oberammergau Passion Play in Germany, the Floriade in Holland, the Olympics and so forth.



Itinerary Planning Hints

Many times you will be buying a trip “off the shelf,” selecting a trip from your favorite tour operator, and offering it to your organization “as is.”

This is particularly common if the trip appears to be totally appropriate to the needs of your membership. It may be a trip planned specifically for your market and, therefore, may not need any modifications for your group.

At other times, however, you may find a trip you’d like to use, but feel it needs changes in order to prove suitable for your group. And sometimes you may not be able to find a trip at all and decide you’ll design one yourself. In this case, you’ll need to know some of the points that make for a well-designed trip.

Timing

If you are a novice at trip design, one of the first things to consider is not overtiring your participants. Often we are so enthused about a destination that our inclination is to stuff more into a day than will fit, thus having to rush participants, perhaps taxing their strength and not allowing them to enjoy one event before pushing them on to the next.

Living in the San Francisco/Bay Area as I do, I enjoy a day in the Napa Valley, perhaps jumping into the car with a friend, visiting a winery or boutique or two, and savoring a lovely lunch somewhere. This works well for two or three people. But for a coach full of 40 people, it could be a recipe for disaster.

A group of 40 takes longer to get on and off the coach. A group of 40 can form long lines at a restroom. A group of 40 can take forever buying souvenirs if there’s only one sales clerk at the



gift shop. And, a group of 40 each ordering something different for lunch and paying the waitress individually can stretch a one-hour lunch stop to one and a half or two hours! In short, a group of 40 moves more slowly than individuals, so the trip planner needs to factor in adequate time at every spot.

Use Psychology

Group trips need to start off with a bang and end with one. This is why I like to feature an opening dinner party and briefing and I also like to wind up the last night with a festive farewell party.

The opening function serves several purposes. It is a way to say hello, a way to formally introduce everyone to everyone else, and a way to get them anticipating the coming days of fun and excitement awaiting them. This opening event can include a briefing wherein you run through your “Rules of the Road” and answer questions. The opening event also sets the social stage for their enjoying one another and forming friendships, be they transitory or lifelong.

Similarly, I feel a farewell function serves as closure. It should be festive, with perhaps a little extra budget for wine, flowers or musicians. I like to hold it in a private room rather than the main dining room so we can have the camaraderie of toasts, speeches, song, or even a well-planned “sales pitch” for your next trip.

Balance & Pacing

Other things to consider in proper trip planning are balance and pacing. By balance, I mean a variety of types of activities in a trip. If the group has spent a fairly intellectual morning, then perhaps the afternoon might be a light-weight activity: shopping, an entertainment event, or maybe a yummy meal. Try balancing serious/happy, outdoor/indoor, participatory/observational events.

Pacing on the other hand deals with how fast or slowly the day’s activities move along. I find that folks need time to rest their weary feet. They need to warm up with a cup of hot tea. They want a few minutes to write a postcard home or jot in their travel diary.

They also want time factored in to take care of their health—to take their vitamins, perhaps do some stretches or light exercise, and get enough sleep. And certainly they need those few extra minutes in the morning to return to their room after breakfast and use the bathroom before heading out for the day.

I find it helpful to include some sedentary activities and some active ones. After riding on the coach for four hours, they need to walk around. And, if they’ve been on a sightseeing tour with lots of walking and standing, they’ll certainly welcome a sit-down activity thereafter.

It should be remembered that many of us find standing for long periods more tiring than walking. For this reason, I find museums particularly difficult. I usually like to plan with the guide to start a museum visit at the top and work downward. I also like a guide to focus on just a few items in a museum and then turn the participants loose to do as they please.

If your trip includes air travel, plan to book flight connections en route allowing more than the legal minimum connecting time between flights. Moving a group off one plane through the



airport and onto another plane can take much longer than anticipated. Typically, members move at different speeds, are carrying hand luggage, and may wish to stop off at the airport restroom along the way.

Start Early—Get Advice

Other itinerary planning hints might include starting to plan a year in advance, checking any crucial hotel space availability at the outset, and working with your favorite motorcoach company to be sure of distances and realistic drive times.

Also get the convention and visitors bureau of your destination cities involved; they often have good ideas for inclusions. They can alert you to future special events and to dates when their city may be sold out due to major conventions, festivals or sporting events. You don't want to be competing with the Super Bowl for hotel space!

Be Different

Lastly, think of how your tour can truly be different than everyone else's. What can you include in your itinerary that no one else is including? What fun event could you "hang" your tour on and feature in your promotion? Is there a new way you could do the same old destination?

For example, every senior organization I know is doing or has done a trip to Branson. In fact, there seems to be a competition nowadays to see who can do it for the lowest price. I tried the opposite approach, coupling a three-day Branson stay (including six shows) with a cruise on the Mississippi from Memphis down to New Orleans, ending with a New Orleans package. It was an expensive trip, almost as expensive as a European trip. But it was wildly successful!

Think creatively. Go for it!



Go International

Many of you have become experts at doing trips here in the U.S. or Canada - the local one-dayers, weekend excursions, or longer forays to various and sundry points across the country. And our own country certainly has much to offer the traveler, whether it is our wonderful national parks out West, our historic cities of New England, or perhaps our unique Southern cities.

Yet, a number of you are hesitant to try international destinations for your groups. Perhaps you're afraid. Perhaps you think they're too expensive, too risky or won't sell. Perhaps you feel you don't have the expertise. There are all the reasons in the world not to tackle international travel for your organization, but there are many more reasons to try it. Here are some of my top ones.



- ✓ We now live in a global world and a global economy—we need to be part of it.
- ✓ We need to learn about other cultures and expose our travelers to other countries, other peoples, and other ways of life. Many of our travelers are hesitant to go by themselves; they depend on us as trip coordinators to show them the way.
- ✓ Although there are now many wonderful and educational TV shows through PBS and other sources bringing into our living room the glories of different parts of the world, it can never live up to having really been there in person.
- ✓ International travel can change one's life, one's career, one's future. I should know; it did mine. After college graduation, a trip to Europe changed my career focus from journalism to the travel industry.
- ✓ While international travel allows us to see how other cultures may differ from us, conversely it also shows us how much people are alike the world over – that we really do all belong to the family of mankind.
- ✓ By planning properly, we may find that international travel can actually prove more advantageous financially than travel here in the U.S., particularly if we select destinations where our dollar is still strong. While Europe is pricey due to the weak dollar vis a vis a super-strong Euro nowadays, neighboring destinations like Canada and Mexico can give us more for our buck, not to mention far flung spots like Argentina with a three to one exchange rate.
- ✓ We need to help our travelers educate themselves so that they may better understand the nightly newscasts with their coverage of world events and distant places – perhaps places many of our trip participants have never even heard of.
- ✓ We really have no excuse for not trying international travel, as we have at our fingertips so many excellent U.S. based tour operators who have had years of experience and can operate such trips for us and our clientele. We don't need to operate the trip ourselves if we feel we don't have the necessary expertise. We can buy into a tour operator's existing tour or we can ask to have a trip custom-designed for our group alone.
- ✓ Adding more international destinations to our annual calendar of trips can add excitement among our present travelers, giving them something new to look forward to, as well as bringing new travelers into our programs. New and interesting itinerary offerings can serve as a catalyst to help grow an organization's membership.

And lastly, we need to see the world now before it's too late – too late before we become more entrenched in world conflicts, too late before more world destinations are destroyed or off the tourist map, too late before we become more isolationist and hunker down in our own backyard – no matter how much we may love that backyard.





Hints for Good Itinerary Planning

There are trips wherein the itinerary on paper absolutely sings to you. It's so well written and sounds so mouth-watering that it sells easily. But will it operate easily? Not always. Here are 10 hints to think about when you're laying out your itinerary:

- 1) Start your planning early enough. For a major tour, be it international or domestic, you need a year from the time it's merely a gleam in your eye up to the day you actually depart. If you're buying the trip "ready made" from a tour operator, you can get away with a little less lead time.
- 2) The trip should open and end on a high note. Be sure to include a welcome party and a farewell party – preferably a nice dinner.
- 3) Include a variety of activities – not all the same kind. A museum here, a cathedral there, a market, a theater performance, a lecture, a school visit, etc. This change of activity, change of interest and change of pacing make for a more interesting trip. Since all people don't always like the same thing, it gives a little something for everyone.
- 4) If the trip is a week or longer, include some festivity midway through the trip. Folks often bog down midway and may start skipping activities; you need a pick-me-up.
- 5) Be sure to schedule time for rest. If you're planning a morning tour and an evening function, give them the afternoon free for independent interests: cafe sitting, shopping, browsing, napping or taking a walk. If they've been up late at an evening function, plan the following day so they can sleep in a bit.
- 6) Include at least one "private" activity – something that the general public can't buy. Consider bringing in a lecturer from the local university, a behind-the-scenes visit after a theater performance, entrée to a private club. In Dublin I arranged through a very innovative receptive tour operator a visit to a lovely private home complete with a cooking lesson from the wife and a garden visit with the husband.
- 7) Vary your modes of travel. While it's true that making the entire trip by motorcoach is easy and least expensive, it's often more interesting to insert short rail or waterway segments. A half-day cruise on the Danube, the bullet train between Tokyo and Kyoto or a ferry crossing can liven up an itinerary and give members a chance to mix with the locals.
- 8) Plan en route mixer activities to foster friendships among the trip participants. Many folks look to their trip experience not just for travel for the sake of travel, but also for fun and friendship. I've been known to stand up on the coach and ask all men to rotate seats and sit with someone else's wife!



9) Assign the best tour leader you can find to the trip. Don't assume it's always you or one of your assistants or volunteers who "deserves" the free trip.

10) Work with the best tour operator you can find, not necessarily with the cheapest or one you just happened upon on the Internet. You want one who's been around a while and has established its reputation. Membership in such organizations as the National Tour Association (NTA), United States Tour Operators Association (USTOA) or American Society of Travel Agents (ASTA) add an air of respectability and financial protection.

These 10 suggestions, coupled with a good marketing plan and meticulous calendaring on your part to ensure that important billing and deposit deadlines are not overlooked, should help produce a successful trip.



An Economic Crunch?

You may have been trotting along year after year with your usual travel offerings, filling your trips or most of your trips adequately. But now you may suddenly be getting signs from some of your old faithfuls that their personal economic situation may not allow them to travel with you on your upcoming trips.

Of course, you may be among the lucky trip planners who have an upscale clientele that is not being affected by inflation, job loss or downturns in their investment portfolios. Nevertheless, a number of us rely on travelers who feel they should tighten up their expenditures and forgo travel this coming year.

What should you do if you sense this reaction in your travelers, no matter what economic level they represent? You could call it quits and let your travel program rest a couple years and then pick it up again. But if you don't offer the continuity of trips, you risk losing your clientele – perhaps forever. They may drift off to other travel providers and will most likely not return to you later when they feel more confident about their economic situation. They will have found a new "home" for their travel needs and it will probably be impossible for you to woo them back.

A better solution is to modify the types of trips you offer to programs that meet the constraints of their pocketbooks. Let's look at a few options.

1. Shorten your trips. Instead of offering 10- to 12-day tours or cruises, try one that's six or seven days maximum. Even consider one- to three-day trips to keep the momentum going. Remember, part of the reason they travel with you is social – the camaraderie. You don't want to lose this.
2. Instead of including three meals a day, try just two or breakfast only.



3. Consider a basic trip plus an optional post-trip extension. That way, those who have limited time and/or budget can sign up for the basic trip only, while those with additional time and monies can continue.
4. Consider trips that hunker down in one location and then run daily side trips in and out. This way you'll get a better hotel rate (if you negotiate) by staying a week. Some of the daily excursions can be costed into the basic package while others can be optional and those who may not wish to spend as much can bow out gracefully without being embarrassed.
5. Look at destinations closer to home.
6. If planning an international trip, consider countries where the currency exchange rate won't blow you away. Countries using the Euro nowadays are sky high. Latin America and some Asia destinations are a lot more reasonable.
7. Use a wholesaler and buy into one of its departures. True – you won't have the exclusivity of having just your group, but the advantage is if you only produce a small group, they can still go; you won't have to cancel the trip due to low turnout.
8. In the same vein, reserve what's called a "spread" of cabins on a cruise – a few budget-level inside cabins all the way up to a few deluxe ones. Participants can select what's right for their pocketbook. Negotiate for best deals by picking off-season dates and be prepared to sell early. The cruise line won't let you continue to hold unsold space very long.
9. Consider unique lodging possibilities university dormitories, short-term apartments or rustic cabins. You'll probably have your own good ideas as to how to keep your travel program alive and well even in a difficult economic crunch time. Don't be afraid to try them. You might end up with your most successful trip yet.



Determining A Destination's Suitability For Your Travelers

After climbing two imposing marble stairways at the Uffizi Gallery in Florence, Italy, with a tour I was escorting, I had dropped back to help one of my elderly tour members who was slowly inching her way up. As we stopped briefly to catch our breath, I looked up as most of my group reached the top, only to hear them gasp, "Oh, No!"

They had made the turn, to discover another double stairway equally as challenging awaiting them. It was at that point that I reminded myself how important it is to evaluate where we take our tour participants, not only where in terms of destination, country or city, but where in terms of specific stops and sites we plan to visit and mode of travel we plan to use once we're there.



Those of us who may operate trips for seniors know that the senior market is not monolithic. We have active seniors and couch potato seniors. We have seniors who play golf and tennis and do yoga, and we have seniors for whom walking and standing for long periods of time are excruciatingly painful. Even so, there are many common denominators we need to think about when planning trips.

Safety

We may get a better hotel rate in a not-so-nice part of town, but do we really want our members' safety compromised? They may not wish to be confined to their hotel grounds at night, but might like to take a stroll to a nearby café or do a little bit of window shopping after dinner.

Pacing

What about pacing of the day's activities? Are we pushing them beyond their energy level? Overtired tour members may become sick tour members. When they have paid for an inclusive tour they don't want to miss those activities, even if they do get overtired!

Allow each participant to enjoy optional activities at his or her own pace. As I've mentioned previously, hub-and-spoke tours are ideal; the group settles into one locale and individuals elect to participate—or not—in specific daily activity offerings. If there's a morning activity, a free afternoon might be in order, particularly if an evening dinner or program is planned that night. If the group has an evening activity, the next morning should be free, or a later departure time should be scheduled.

Altitude

Be aware of high altitude destinations, which can be dangerous for folks with a history of high blood pressure, cardiac problems, asthma and other respiratory difficulties. This is why most South American trips designed for seniors usually visit Brazil and Argentina, but leave Peru and the high Andean cities as an optional tour package. Some potential tour members may even find Lake Tahoe, mile-high Denver or the Rockies a stretch.

Availability of Emergency Medical Attention

This is an important consideration. While most tour operators have access to the house doctor at major hotels or even to state-of-the-art hospitals in key cities, on the other hand, in the Australian Outback or the Costa Rican rainforest limited medical services may be available. Screen your participants very carefully before they join a challenging tour. Some tour operators may require a doctor's letter of permission before an individual is accepted on a trip of this nature.

Food

Some areas offer safe, tasty and not overly expensive dining possibilities and can accommodate low-cholesterol or salt-free diets or diabetic eating programs. Pre-set menus preclude individual selection and may not be suitable for your group. Countries like Spain, for example, serve dinner very late. Some folks cannot adapt to eating a heavy meal after 9 p.m. And what about safe drinking water?

Degree of difficulty

Strangely enough, the areas which may be difficult for some participants are not necessarily true adventure trips or other "roughing it" destinations. On those kinds of trips we more or less know the challenges—hiking, staying in out-of-the-way inns or even camping! If we're smart, we alert



our members to “get into good condition” before such a trip by exercising or taking a daily hike to get all those unused muscles ready for what awaits them. Often, walking is not the problem, but standing is.

Carol Tefertiller, with the Golden 55 Travelers group at the Monterey (CA) Senior Center pointed out, “There are a number of very active and adventurous seniors out there. When I took our group to Thailand they did virtually everything. Only one couple opted not to attempt the elephant ride.”

Many historical sites and antiquities are difficult to access. Castles and fortresses of the Middle Ages were purposely built on hills, permitting the local feudal lord to have a bird’s eye view of the plains below, and any attacking armies. Today these sites don’t permit vehicles beyond a certain point, so visitors have to walk up steep slopes. Donna Rice with the Campbell (CA) Senior Center finds Hearst Castle with its 300+ steps a destination not all can visit comfortably.

“Easy” destinations

What cities are easy to visit, and which are difficult? Surprisingly, many travel planners find New York an easy destination, in spite of its size and its hustle bustle—no hills, lots of elevators, a broad selection of restaurants and a wide range of activities. Santa Fe, NM, is reputed to be a great destination but participants need to be alerted about its 7,000’ altitude. Other spots tour operators rate as easy include Orlando, San Antonio, New Orleans, Boston and Honolulu.

There are popular destinations which are going to be difficult. Carefully investigate each destination or tour. More and more cities are enacting laws that prohibit bringing coaches into certain areas or stopping to load and unload close-in to certain sites. Tell the tour operator you plan to use about any concerns you have about some of these factors. Insist on answers to all these queries before committing to a specific trip. If there are difficult areas, state that in all tour materials so members can decide in advance if the trip is a good choice for them or not.



Once Upon A Time

Once upon a time there was a country that fell on hard times. No one wanted to go anywhere; they just wanted to curl up by the fireside at home with loved ones and wait for the next calamity to come knocking on their door.

If the above scenario sounds familiar, maybe it’s time you give them what they want – some trips closer to home, some trips to places where they feel safe, some trips that could include the whole family, and even some trips from which they could scurry home quickly and easily if the going gets rough.

Often in our search for challenging, interesting and appealing trip offerings, we tend to think that farther away is somehow always better. I know I’m often guilty of that kind of thinking, eschewing a trip to the state next door for my latest trips to Russia, Brazil and Italy. But perhaps



now is a good time to look to our neighbors – perhaps to Mexico to the south or Canada to the north, both of which have a lot of appeal but places we may be overlooking because they’re always “there.”

Canada is appealing to Americans – it’s seen as safe, clean and English-speaking (even if part of it is French-speaking). And, if you’re thinking of Canada for your group, you’re in luck because Canada has a wealth of special festivals and activities year-round to tempt the visitor. February brings Quebec City’s Winter Carnival, a two-week celebration of snow, ice and winter sports. Festive night parades, a snow-sculpting competition and dogsled races are highlights. A visit to Quebec would be paired nicely with nearby Montreal, largest French-speaking city in North America. Here your group can visit famed Notre Dame Basilica, built in 1656, shop the underground city (and thus stay out of the cold) and enjoy French cuisine at a variety of fine restaurants.

TIPTOE THROUGH THE TULIPS

May brings the Canadian Tulip Festival in the nation’s capital, Ottawa. The festival originated in 1953, commemorating a gift of 100,000 tulip bulbs given to Canada by Queen Juliana of the Netherlands at the end of World War II. The gift was a thank you for keeping Holland’s exiled royal family safe at Government House during the war and to recognize the role Canadian troops played in freeing the Netherlands from German occupation. Festival highlights include concerts, cabaret nights and the tulip viewing drive along the Rideau Canal.

Calgary is home to July’s Calgary Stampede, complete with Chuckwagon Races, agriculture and livestock exhibits, and the Rodeo and Grandstand Show. Calgary is the portal to the Canadian Rockies, where motorcoach trips are available from such companies as Globus, Collette and Brewster, a well-known Canadian operator. Overnights are recommended in Banff, Lake Louise and other locations with legendary hotels built by Canadian Pacific in the 19th century in its westward push across the continent. Another recommended source is Canada’s national railroad system known as VIA, which operates rail/motorcoach combined trips.

Finally, the West Coast port of Vancouver is an attractive city with its Stanley Park totem poles and nearby Victoria on Vancouver Island, reachable by ferry. Highlights in Victoria include high tea at the famed Fairmont Empress Hotel, opportunities to shop for fine English bone china and the renowned Butchart Gardens, which features mid-summer night illuminations, an autumn Japanese garden and a unique sunken garden.

All in all, Canada has something of interest for nearly every type of group—young or old, active or more sedentary, motorcoach traveler or rail buff. Consider our neighbor to the north, give yourself nine to twelve months’ lead time to promote the trip properly and go for it! It may be your best trip yet.





Say “Sí Sí” To Mexico

In the last issue we discussed the importance of planning trips closer to home in these times when our travelers are facing economic belt-tightening, fear of the future and an unwillingness to appear to be Big Spenders. Both our neighbors – Canada to the north and Mexico to the south – are good value, close to home and appealing. In this issue, let’s take a look at Mexico.

Many North Americans head south of the border for a warm weather breakaway from blustery northern U.S. climes in winter, looking for beaches, beauty and booze. And, bless their hearts, if this is all they want out of a vacation, so be it. But Mexico is so much more: historic Mexico, cultural Mexico and a Mexico of rich traditions not to be found in her superficial beach resorts, but rather in the interior of the country. Tours of her Spanish Colonial cities or perhaps of areas such as the Yucatán Peninsula with its pre-Spanish cultures can be an eye-opener to our travelers. Best of all, Mexico is currently one of the “best buys” with the dollar now buying more than 14 pesos compared to a mere 10 a short time ago. The country and its people are accustomed to North American tourists and eager to have us. And, while emphasis still seems to be on the beach resorts like Cancún, Acapulco, Puerto Vallarta and others, there are operators who are once again offering colonial cities routes or Indian cultural experiences. Some operators will custom-design group itineraries to show your travelers the best of these areas.

SMALL-TOWN BASE

An itinerary that worked for me several years ago was one to the states of Jalisco and Michoacan, on which we flew into Guadalajara and stayed for five nights in the nearby suburban artisan town of Tlaquepáque (pronounced “tla-kuh-pahk-eh”) rather than in downtown Guadalajara. Our home was a small bed-and-breakfast-style *posada* rather than a big-city high-rise. From there we were able to visit the sights of Guadalajara (the Orozco murals, Cathedral, plazas and Libertad Market) and attend the University’s Ballet Folklórico. But many of us preferred spending time in Tlaquepáque to browse the artisan shops and lunch at El Patio Restaurant with its all-woman mariachi band to serenade you over a mid-day margarita.

From Guadalajara, we then spent the next five days staying in smaller colonial towns like San Miguel de Allende, so popular with American residents and noted for its fine Art Institute. We visited Dolores Hidalgo, birthplace of the War of Independence from Spain, and lunched in Morelia, an elegant university city. Another interesting stop was Pátzcuaro, and finally Guanajuato, a former mining town built in a system of crazy zigzag streets and connecting tunnels.

In these villages we had opportunities to walk cobblestone streets and sit in the plaza to hear the local band play. We could poke our nose into lovely homes with their hidden inner patios with tiled fountains and bougainvillea in bright oranges, pinks and purples. We shopped for pottery, glassware, embroidered linens, copperware and straw goods. In one town the visitors bureau set up a day-long tour to artists’ studios.



Another approach would be to fly into Cancún or Mérida and enjoy visits to Mayan archaeological sites such as Chichen Itzá or Uxmal. There are colonial-style inns nearby. At these sites your group can see the ball courts (where it's said the captain of the losing team not only lost the game, but lost his head as well). They can also see the well where the guides will tell you they threw the most beautiful virgins to appease the gods.

All in all, the “real” Mexico can prove a satisfying and unforgettable travel experience.



Consider Participatory Trips

More and more often our travelers are telling us they don't want to just sit on a motorcoach and look out the window at the world passing by. They no longer want to just “go sightseeing” or “join the afternoon city tour.” In short, they don't just want to be a tourist observing life. They want to be IN life. They want to get to know local people. They want to go where the locals go, not where the tourists go. They want to make friends and exchange ideas—not just superficial pleasantries.

The Need to Connect with Others

Part of this is a need to connect, a need to learn, a need to come home with new ideas and new memories. But it's often more than that. It can also be the need to feel that one has made a difference, a contribution.

So what are some of the activities in which you might involve your trip participants to make them feel more involved in life as they travel rather than be mere spectators?

One way, of course, is to have them interact with local residents in the area you're going to visit. This could be on a one-to-one basis as in a home stay or home visit program, which some countries or cities offer. Or it could be on a group basis wherein you arrange for your group to join with a local group in some activity. This could be a group with the same interests as those of your group. Or, it could simply be a group with similar demographics—for example, a senior organization with a senior organization, a golf club with a golf club, etc.

Consider Joint Activities with Local Groups or Organizations

Travelers enjoy participating in certain activities or events. I once met a travel agent whose passion was tango dancing. She successfully organized a group trip to Buenos Aires that included attendance at various tango performances, participation in a tango contest and private master dance classes.

Most women and many men nowadays, as well, are interested in food and wine. I have often asked my tour operator to arrange for a private cooking class for my group—complete with a



chef/instructor demonstrating, followed by one or more of the tour members attempting to cook the same dish. This can be augmented by visiting the market beforehand to select the correct ingredients and providing pre-typed recipes to the group. And, of course, they can then all enjoy the entire meal together afterwards. This has worked well for me in France, Italy, Mexico, Ireland and Argentina.

Lunch at a Former Convent

Recently the chef of one of the best luncheon restaurants in Guadalajara taught me and my group to make chiles rellenos and enchiladas. The atmosphere was greatly enhanced by the restaurant atmosphere, a patio of a former convent complete with ghosts and the former nuns' writings on the walls. Wouldn't it be wonderful if your tour members could come home from New Orleans having learned to make beignets or from Texas able to make the best chili in the world?

Of course, it's often not just the doing something, but rather doing something for someone else—donating one's time, friendship, expertise or thoughtfulness. I've known of groups that bring clothing for the less fortunate or school supplies for students whose parents can't afford books, pencils and notebooks for their youngsters. There have also been groups bringing medical supplies for a hospital or even rescue supplies for recent earthquake or flood victims. The act of giving provides a sense of satisfaction that no other activity can provide.

Another idea is to travel or participate jointly in some professional activity with a group of like interests. I once handled a performing tour of a U.S. community choral group of about 65 participants, which gave a concert at the Gloucester Cathedral in England in conjunction with the local English chorus of Cheltenham. We enhanced the program with our own concerts at chapels in Oxford, Stratford, and Greenwich—all set up by our British tour operator. Instead of staying at a hotel, our operator arranged to lease a huge English manor house for us all. The entire week was capped with one giant joint farewell party of the two choruses.

Advance Planning and Extra Work Required

While this kind of travel program can require months of advance planning, extra work and time, the results can be phenomenal. Phenomenal not only in terms of tour member satisfaction but also in terms of the publicity it can engender for the trip and the membership growth it can attract—growth both for your trip and for the organizations involved.

So, for your next trip plans, think doing. Think participating. Think giving. It may give you and your trip participants a totally new slant on travel.



Touring Should Be Fun

Thinking back to when we were kids, a trip could be a deadly bore or it could be a breathless, exciting day filled with new, fun things to do. It all depended on our parents to be skilled enough to plan the day-to-day activities along the way.



Adults Want Fun Too

The same concept can be true today in dealing with adult travelers—travelers who want fun, change-of-pace and interesting activities along the way. It's up to us to plan our trips accordingly.

For starters, we might consider including a very special luncheon experience—a memorable restaurant, a fine menu, interesting décor, nice service, maybe foods typical of a certain area.

I recall an informal but fun pub lunch at a country “Public House” perched on a hilltop in the English Cotswolds. How we laughed as we enjoyed reading the menu that informed us that “Please remember it is our policy to ensure the majority of clientele enjoy the tranquil surroundings of a village atmosphere and we will not allow this to be spoiled by a few misbehaved children. The landlord and landlady reserve the right to ask them to leave.”

We then enjoyed a short hike in the hills behind the pub and ended the afternoon browsing the handsome village shops. Here the men bought heavy wool sweaters with leather elbow patches while the ladies stocked up on British kitchen wares—unique potato peelers and salt boxes. All in all, it was a day planned to satisfy different needs one after the other.

Breaking Up The Day

So, consider not just your final destination for the day, but the activities you can schedule along the way to break up the day. How about a stop in the countryside at a farm stand to buy a huge basket of fresh fruit and then hand it out as a snack to everyone on board? What about treating everyone to an ice cream cone?

If planning to go through a town with old Victorian homes and an interesting history, why not plan ahead to have someone from the local historical society join you for a ride around town with a talk about the local architecture? Or just stopping the coach at a park for a few exercises right there on the lawn?

Interesting activities can be generated on the coach, as well as off. I've been known to announce that, “All the men should please stand and sit next to someone else's wife,” or you could simply have everyone move to sit next to someone new to them. I'm sure you must also have your own jokes, sing-a-longs, CDs, and games.

Making Friends

Making new friends should be one of the goals of each and every trip. I've had tours wherein things have gone wrong—bad weather, mixed up scheduling, etc. But, everyone came home swearing it was the best trip every. Why? Because they made friends.

Remember, many folks go on group travel programs not just to go to new places and see interesting things, but to *have a good time*. To laugh. To meet people. To share experiences and life stories. Therefore, one of your most important roles as trip planner and leader is to ensure that no one feels alone or left out. You'll want to be sure that little cliques don't form, making outsiders feel unwelcome. That the tour members mix and sit with different folks at different meals so that no tour member tells you they have no one to eat dinner with.



Not Just Coach Trips

One of the best ways to keep people engaged is to schedule the trip so as to utilize different modes of travel—not just a motorcoach. Coach trips are certainly the least-expensive way to operate and an easy way for the tour leader. But, motorcoach trips are not necessarily always the most interesting. Trips which involve rail travel or short river cruises within the trip can break up the tedium of long day trips confined to one coach. On a train or on a boat, one can walk around, meet the locals who happen to be on board, and perhaps see sights that one cannot see from the super highway.

So, think about ways you can improve your travel programs. Plan for daily variety, change of pace, and above all, activities to stimulate friendships en route.



The Many Roles of Travel

We know that our fellow travelers join our trips because they love traveling, getting away and seeing new places. However, there are many more motivations for traveling with us.

Therefore, it's important that we understand the many roles we play in our travelers' lives. It's important we realize how our trips can fulfill those many aspects. It's incumbent upon us to see to it that our trips are designed to meet these expectations on the part of our travelers—expectations that may not be stated out loud, but that nevertheless exist.

A Good Time

First of all, our trips must provide fun. Many people do not have a lot of fun in their lives. In fact, their lives may be full of doctors' visits, emotional hassles with family, financial problems and worry: about the future, about day-to-day problems, about their loved ones, and of course, the ultimate worry—worry about death. Our trips can bring a lighter side to their lives—laughter, jokes, enjoyment. One of the nicest things you can hear from a tour member upon return from a trip is simply, "I had such a good time."

Something to Anticipate

Another thing we provide is anticipation. A trip gives them something to look forward to, to think about, to dream about and to tell their family and friends about. It gives them something to put on their social calendar, to plan around, to be sure they have the right clothes ready for. Perhaps it allows them to look at maps and orient themselves and draw in with a marking pen the route they're going to take. And if they're ambitious, it might give them time to read up on the area they'll be visiting and heighten their anticipation.

Friendship

Our trips should also provide friendship. A trip is an opportunity to make new friends within the group, and perhaps rekindle old friendships with other trip members whom they may not have



seen for a while. Perhaps in the past their relationship with certain members was very rushed or casual and they would have enjoyed more time and the opportunity to get to know someone in-depth.

It's up to us to see to it that our itinerary is designed and escorted in such a way as to allow friendships to flourish. Here's where a tour escort with social skills may actually be more important than the itinerary itself. Does she know how to facilitate the intermingling of people? Does he see to it that no one is ever left out, feeling unwelcome at the dinner table, or not included in an activity? Does she move people around in the motorcoach so they sit with different folks? Does he do all possible to break up little "cliques" that form or may have been in existence before the trip?

Good Food

Our travelers enjoy good food—not just the same old food they've been eating day in, day out, and not just the limited menu they get at the corner cafeteria or the simple foods they may prepare for themselves at home. Instead, how about including a truly memorable meal—a top-notch restaurant with elegantly prepared and graciously served food—a festive dining experience?

Activate the Grey Cells

Our trips should also include some form of education. Many travelers nowadays are avid learners. And while many enjoy nostalgia and hearing about the past, I find that a great majority are excited about learning of new developments and what's coming in the future—even the future when they'll no longer be here. It need not be a formal classroom situation with a lecturer, but can be group discussions, local guides or experts or docents at a museum.

My own mother, who lived almost to 100, marveled at the changes she had seen in her own life from horse and buggy to the automobile, radio, TV and the man on the moon. The day Neil Armstrong set foot on the moon was one of the most exciting in her life. But she didn't stop there. She continued to talk excitedly about future changes she envisioned, particularly in science, such as artificial human organ replacements.

You can do your travelers a favor by providing intellectual stimulus through lectures, informal talks, films, museums, readings, theater and the like. While providing interesting activities, you are also helping each individual become a more interesting person—someone who can come home and talk about the new generation of artists or the newest play. Sometimes we not only become bored with our lives, but unfortunately become boring to others as well, constantly talking about the past or our job, illnesses or hardships.

Get Out of the Rut

Another role a trip plays is that of opening new horizons. So often we get into a rut. We do the same thing every day, follow the same schedule, see the same people and see the same surroundings. A trip serves to introduce one not only to brand new places, but also to new ideas, a new way of doing things, and sometimes a new way of thinking.

Memories

Lastly, our trips should provide memories to be enjoyed now as well as to be savored when one is too elderly or infirm to travel any more. Memories of new places, whether nearby or on the



other side of the world, form pictures in our mind—pictures we can recall and look at again and again, even when we may be too ill or out of touch with reality to discuss them intelligently.

All in all, your trips can enhance the lives of travelers in many, many ways—ways that are more helpful and memorable than you can imagine. Let's make the most of this opportunity to truly serve others in our lives by allowing them to live their lives to the utmost. The reward will benefit both your travelers and you.



Private Entrée Makes for Unique Tours

Entrée. No. I'm not referring to a course on the menu. Entrée is French for entrance. Or to quote Webster, entrée is "freedom of entry or access." And private entrée? Entrance or access to something or someone that the general public does not have. Here is your chance to provide a tour with these truly innovative private features which can differentiate your tour from a million others.

These features can offer clients the personal touch. They can also make it possible to compete with less expensive tours. Your tour includes private features which are yours alone and justify a higher price.

What are some private entrée features you might consider including in your itinerary? This will depend, of course, on the destination in question and the special interests of your group. I find that many adults are interested in ongoing education and the lifelong learning concept, so I've used private classes, lectures and demonstrations effectively. I also find that they love meeting "real people"—not just hotel bellmen, waiters and guides.

When in France...

In France, my group spent a day at a private manor house outside Aix-en-Provence, complete with a four-hour cooking class, followed by wine tasting and a leisurely and elegant lunch under the trees on a warm summer afternoon. In northern Italy, the same thing was possible—an extremely articulate chef who patiently taught us to make risotto, pasta and other Tuscan and Umbrian goodies.

As part of a London trip, it was possible to arrange for a private fashion show. In Stratford, following a performance at the Shakespeare Memorial Theater, a backstage visit for our group with the director and several of the cast.

A special-interest tour in Japan for those in agribusiness included a day with local folks. The group was amazed to learn how the Japanese raise watercress on land under their freeways, thus using every inch of tillable land to the utmost.



An unusual and very personal type of experience for many tour members is an opportunity to stay overnight in a private home with a local family. This was accomplished in Australia, by contacting an Australian ranching organization that was anxious to raise scholarship monies for their students. Each family in the association agreed to take one of our visiting tour members home for a 24-hour ranch stay and we, in turn, made a donation to the scholarship fund, so it was a win-win situation for all involved.

Mr. & Mrs. Smith Go to Washington

Many times by adequate advance planning and political persuasion, you might arrange for your group not only to visit the sights in Washington, D.C., but also to meet and chat with your congressional representative. Many of them are most willing to meet with their constituents from back home.

Some years ago the owners of the receptive operator company I've used for many years in England bought an old Manor house in the Cotswolds. One of my groups loved being invited to a private late afternoon tea at their home. Our hostess explained the progress they'd made in the house over the years and her husband proudly showed off his garden to our admiring group. And then high tea was served and the two college-age sons graciously greeted our members one by one. All in all, it was a most memorable afternoon.

This same operator arranged for an Oxford dean to address a group fireside on a blustery snowy January day. He also helped me plan a concert tour for the Berkeley (CA) Community Chorus, singing jointly with the Cheltenham Chorus. It was a unique opportunity for two groups of similar interests to share an endeavor on a more personal level than ordinary public tours permit.

This sort of combined effort could prove very effective if an organization from the western U.S. were to do something with a similar organization from another part of the U.S.—or abroad.

The concept of private entrée is as rich as the imagination permits. Put on your thinking cap and ask your volunteers to do likewise. And, by all means, ask the tour operators you use to design some private and unique features for your group alone. Even if it does raise the tour price a wee bit, the unique flavor of your trip will make for a most distinctive and sought-after travel adventure.



End-of-Year Holiday Trips

For many folks, the end-of-year holidays are something to look forward to every year. Be it Christmas, Hanukkah or New Years, to them it's a time for festivity and family togetherness. But for many others, the holidays can be lonely, a time of nostalgia, perhaps a time of heartache. And it might also be a time of exhaustion and frustration, when some say "I don't want to go through all this again next year; I'd like to get away from it all—all this shopping and commercialism."



Fill an Emotional Need

So here's where you come in. Perhaps your tour program can provide not only a wonderful travel experience but can fill an emotional need, giving those folks who want a "family" to travel with at this important time of year. And for those who would love to experience the holiday scene but who don't necessarily want to go away on the holiday itself, why not consider a pre-holiday trip, perhaps with shopping, or consider a post-holiday New Year's trip.

Certainly one of the most popular holiday trips is to the Pasadena Tournament of Roses Parade on New Year's Day. Most such trips include—in addition to hotel accommodations and breakfasts—an introductory city tour of Los Angeles, a New Year's Eve party, perhaps the "Glory of Christmas Show" at the Crystal Theater and, of course, reserved seating along the parade route.

Mexican Posadas

A country that knows how to celebrate Christmas in a big way is Mexico—nine days of it. Known as "Las Posadas," the nine days before Christmas represent Mary and Joseph's search for a room in Bethlehem. Local families and many hotels feature re-enactment of the search. No country decorates its streets and buildings for the holidays as does Mexico with canopies of lights on principal streets and with huge building façade displays.

Las Luminárias

If you have not taken your group to San Antonio, Texas recently, the holidays are a wonderful time to consider it. In this riverside city, one of the highlights is the "Fiesta de las Luminárias" when Christmas carolers sing from barges and the Paseo del Rio (Riverwalk) is illuminated by thousands of candles. These festivities can be combined with visits to The Alamo, the colorful Mexican Marketplace, and the LBJ Ranch. Adding Fredericksburg, a nearby German settlement, can round out an interesting five-day package.

If your group hasn't been to New York to see the Christmas show at Radio City Music Hall with the world-famous Rockettes, perhaps now's the time to think of a future trip to the Big Apple. Browsing Fifth Avenue with its fabulous Christmas windows, watching the ice skaters at Rockefeller Center, and taking in a first run Broadway show can make for a fabulous package. Add an educational component like a visit to one of the city's renowned museums or the United Nations.

Gingerbread and Angels

Certainly the "Biggie" in terms of pre-Christmas holiday trips is the Romantic Road of Germany to visit the *Christkindlmarkts*. These local outdoor markets go back to the Middle Ages in towns such as Rothenburg, Nuremberg, Augsburg, Munich and others. Operating only in December up to the 24th, the citizens throng to them in the evenings after work, shopping for local arts and crafts such as wooden toys, angels, gingerbread figures and more. Often caroling groups sing from the town hall balconies overlooking the square and merchants sell mugs of steaming hot mulled wine to ward off freezing winter temperatures.

Other ideas might include French (Eastern) Canada, a Lake Louise and Banff snowy package, or a London visit when the winter West End theater season is at its best. In England you get an extra day, as the British celebrate Boxing Day (the day after Christmas) when it's customary to give boxes of food and goodies to the poor or to go visiting friends and family.



Cruise Anyone?

And, a holiday cruise is certainly another way to celebrate the season with flair. Since the cruise line provides all the decorations and activities, you can devote your energies perhaps to a special en route party or two, to enhance the cruise line's activities.

If you are planning local one-day trips, there may still be time for this year's trip. However, if you are planning longer trips including air travel, you may find it's too late to secure group reservations on the days desired. Many tour operators already have group space blocked and may still be able to help you. But, it's not too early to start making plans for next year's holidays NOW!



Wrap Your Trip Around a World Event

Tired of doing the same old trips for your group? Are your members complaining they want something new? Maybe it's time to broaden your group's horizons and plan a trip of a lifetime. A trip they wouldn't do themselves—in fact, a trip they wouldn't know how to do themselves.

I'm talking about a trip wrapped around a world event. It could be an event that happens once a year or one that only happens once every ten years like the Oberammergau Passion Play in Germany.

Trips revolving around a specific event can bring an excitement and a promotional focal point to your travel program. Such trips should be booked well in advance through a reliable tour operator rather than trying to do it yourself.

Events you Might Consider for your Group

The Floriade in the Netherlands is certainly the most magnificent flower show in the world; it comes around again in 2012. A number of major tour operators like Mayflower and Globus include Floriade in their itineraries. The event usually runs for a six-month period, mid-April to mid-October.

The Ottawa, Canada Tulip Festival happens annually in May. It began in the '50s when the Netherlands royal family gifted the city 100,000 tulips in appreciation for the safe haven granted them in World War II and Canadian soldiers' role in helping to liberate the Netherlands. The festival's highlight is Flotilla Weekend on the Rideau Canal.

Music Festivals can be Wonderful Magnets for a Tour

The annual Edinburgh Festival or the Salzburg Mozart Festival, both in August, are winners. The New York based company, Dailey-Thorp Travel, has specialized in opera, theater, and music



festival trips for years. And here in the U.S, the Sacramento, California Jazz Jubilee held annually in late-May is particularly known for its traditional jazz, featuring over 100 bands from around the country playing blues, western swing, dixieland, jumpin' jive, and music originating during prohibition era.

Latin America offers a number of interesting festivals that can serve as focal points for a trip. Mexico's Day of the Dead celebration is on November 1st. Families come to the graves of departed family members with flowers, music, and the favorite foods of the deceased.

Another popular Mexican event is the Food of the Gods Festival held in Oaxaca in October. Zapotec Tours has weeklong packages including lectures, cooking classes, restaurant dine-arounds, picnics and more. Mexico is known for its chocolate, exotic fruits and pre-Hispanic spices—all featured in the event. Nearby craft villages and market tours can also be incorporated.

Guatemala is particularly known for Semana Santa (Holy Week) in the old Spanish-colonial city of Antigua, when the famed "carpets" of fresh flower petals are lovingly laid in the streets in preparation for the solemn Easter celebration. And, while Rio de Janeiro may be known for its wild Carnaval, the current "in" time to be there is New Year's Eve when the city turns out dressed in white and yellow. Hotel guests and locals alike make their way to Copacabana Beach to see midnight fireworks and watch as believers perform their own native spiritual rites and then carry flowers into the waves as offerings to Iemanja, the Goddess of the Sea.

Theater Performances

Worldwide theater performances attract groups, be they New York's Broadway shows, London's West End, or theater revolving around one playwright like Shakespeare. Tours to Stratford-upon-Avon, England or to Ashland, Oregon can be winners. Often you can combine theater attendance with lectures, backstage visits, or sightseeing pertinent to the theme of the trip. For example, in Stratford, you can include a visit to Shakespeare's birthplace and the home of his wife, Anne Hathaway.

Seasonal Activities

Activities related to the seasons can also prove attractive focal points for a trip. The popularity of fall colors in New England or spring cherry blossoms in Japan are certainly testimony to this. You might consider Hawaii's Aloha Week in October or the attendance at the take-your-breath-away summer Palio horseback race in Siena, Italy.

Here are some planning items to which you need to pay special attention. Place them on your check list when including a major event in your trip offerings:

- ✓ Do not be surprised if prices are higher during these peak times. Realize that you may be asked to put up advance deposits to guarantee tickets.
- ✓ Obtain all offerings in writing and review all contracts and other proposals carefully for specifics of required payment dates or non-refundable clauses.
- ✓ Be specific about what features will be included and ask about options that can be arranged in advance or on-site for travelers with special interests. Where are the seats for performances? Does the festival ticket cover only entering the main gate or are there other features?



- ✓ Anticipate the needs of your travelers and confirm that the venue can accommodate travelers with special needs like wheelchair access or dietary restrictions.
- ✓ Operational deadlines may be stiffer than those to which you're accustomed, but if you can promote early and work within these deadlines, you can come up with a truly distinctive and memorable trip.



Planning Trips Around Music

You've heard of lap dancing? Well...no..oo..oo, I'm not into that. But I have discovered something lately that I enjoy which I call lap singing. The other day as I was stuck in traffic, I found myself gustily singing along with a new-to-me rockabilly radio station. In fact, I could hardly sit still as I drove. But I was enjoying myself. And, best of all, the trip seemed so much shorter.

I started thinking back to times when I have really enjoyed music – the classics, sing along oldtimers, Latin jazz, or folk music. Music has drawn me to many events, lightened my workload, enhanced my mood, both uplifted and saddened me. So if music has this power, why don't we use it more often as an enhancement to our trips?

This could be as background listening music on a long motorcoach drive. It could be sing-alongs to raucous beer-drinking songs. It could be attend dance at local folklore presentations, a jazz performance, or a Christmas caroling concert. All of these could be woven nicely into an itinerary by innovative tour operators.

Going a step further, one could plan an entire trip around a music festival or event. Classical music lovers might crave a few days at the late July Mozart Festival in Salzburg, Austria (afsalszburgfestival.com). This could be nicely packaged with visits to Vienna and on to Prague. And for opera, England's Glyndebourne Music Festival (glyndebourne.com) which runs from May to August, features a variety of composers: Bach, Verdi, Wagner and more.

Another English festival of note is the Three Choirs Festival (3choirs.com) rotating annually among the three cathedral cities of Gloucester, Hereford and Worcester. This makes for a great trip coupled with a bit of Shakespeare at Stratford and browsing the charming Cotswold villages

Here in our own country, there's the New Orleans Jazz and Heritage Fest (nojazzfest.com) held on two successive weekends late April, early May. It celebrates indigenous music of Louisiana, encompassing Blues, R&B, Cajun, Country, Zydeco and Afro-Caribbean.



The Sacramento Jazz Jubilee (sacjazz.com) over Memorial Day Weekend features over 100 bands offering traditional jazz, swing, ragtime, Latin, blues, western swing and more. Sacramento's an easy drive to the nearby Napa and Sonoma wine country and then on into San Francisco.

From San Francisco one could continue south to Carmel, Salinas and John Steinbeck country, and the Monterey Jazz Festival (jazzinfo@montereyjazzfestival.org), held the third weekend in September. Its stellar lineup has offered such jazz greats as Dave Brubeck, Sonny Rollins, Diana Krall and many, many more.

Don't forget to check your local music venues for shorter trips and activities. Most city symphonies have summer homes such as the Cleveland Symphony's Blossom Center under the stars in nearby Cuyahoga Falls (Clevelandorch.com) or the Boston Symphony Orchestra (bso.org) summer program at Tanglewood in Lenox, Mass.



Mexico's Colonial Circuit

Hola! Your groups may have been to Mexico before – perhaps to one or more of the many beach resorts like Acapulco or Cancún. Or perhaps they've cruised the Mexican Riviera down to Mazatlán and Puerto Vallarta. But if they haven't been to the lovely interior towns of the Spanish Colonial region, then they haven't really seen Mexico.

This is the area of cobblestone streets, lovely homes featuring hidden inner patios with tiled fountains and bougainvillea in bright oranges, pinks and purple. This is where the small artisan towns are located, rich in the heritage of making pottery, glassware, embroidered linens, copperwares, colonial furniture and straw goods. This is the historical area, home to Mexico's movement for independence from Spain. Here you'll find murals of Diego Rivera and Jose Clemente Orozco, folklore ballet, local markets and mariachi bands.

Make The Colonial Circuit

By flying into Guadalajara (or León or Mexico City) one can make the colonial circuit. This should include the aristocratic university town of *Morelia* (named for Morelos, the priest and revolutionary leader in the War of Independence). And it can include the interesting town of *Pátzcuaro*, once the capital of the Purepechan Indian empire (now referred to as the Tarascans). It is here that Lake Pátzcuaro is located and the best known Day of the Dead ceremonies are celebrated Nov. 1 on Janitzio Island in the lake. I found the best selection of woven tablecloths, placemats, napkins and other tablewares in shops on the square in Patzcuaro.

Your itinerary most certainly should visit *Guanajuato*, a city built in a narrow canyon on different levels with zig-zag streets and connecting tunnels. In fact, parts of the city are connected by an elevator much in the style of Lisbon, Portugal or Salvador da Bahia, Brazil. For two-and-a-half centuries, its rich Valenciana silver mine provided 20% of the world's silver, and many colonial



structures built from this wealth still remain intact. The city is also home to Diego Rivera's birthplace and also the popular Cervantes Festival the last two weeks in October, complete with galloping horses and medieval costumes. Strolling student minstrels give the town a youthful spark.

The Bell Ringer

The tiny town of *Dolores Hidalgo* is the place to stop to buy local pottery and to remember Father Hidalgo, who rang the bells and issued his famous "grito" (cry for independence) at his parish church on Sept. 16, 1810.

And no trip would be complete without a night or two in *San Miguel de Allende*, an entire town declared a national monument and immensely popular with "expat gringos" who winter here and take classes at the popular Instituto Allende and School of Fine Arts. Beautiful homes, great crafts shops and fashion boutiques are tempting but at higher prices than elsewhere in the country.

The trip can begin or end in the country's second city of *Guadalajara*. Its central colonial section of the city, its fine university, Orozco murals and folklore dance performances make it a popular spot for visitors. And its huge Mercado Libertad, a four-block, three-story covered marketplace is THE spot for shopping – everything from leather goods to piñatas. The nearby town of *Tequila* makes for an interesting side trip as does the community of *Lake Chapala* with over 5,000 American and Canadian residents who have retired here. And while Guadalajara boasts many top-notch hotels, I found it most attractive to have my group stay in the artisan suburb of Tlaquepaque ("Tlack-uh-pock-eh") instead, but this will only be possible with relatively small groups.

Although most North American tour operators seem hell-bent on offering Mexico resort packages, there are a few who still (or again) are offering itineraries for colonial Mexico – among them, Globus and Collette.

A word to the wise – we recommend flying in and out of Mexico, not trying to save money by busing across the border due to the potential danger of border drug incidents.





CHAPTER THREE

Booking Your Trip Reservations

Once you've focused on the trip or trips you'd like to offer, how do you go about obtaining group reservations far in advance? You can't offer for sale a trip you don't have confirmed first. You must book what we call "No name reservations" as you don't yet actually have the names of the individuals who will be traveling.

This chapter will guide you through the intricacies of actually booking advance group reservations with cruise lines, tour companies, airlines, hotels and other suppliers. It will discuss buying a trip through a recognized tour operator versus trying to do it all yourself—depending, of course, on whether you are an experienced travel industry "pro" or are "learning as you go."



How to Book Your Tours

How do you actually plan an itinerary and book reservations for your trips? There are a number of ways you can do it, with advantages and disadvantages to each. Let's look at the different methods to see the pros and cons of each possibility.

Buying Your Tour "Off the Shelf"

Probably the simplest method is simply saying "yes" to a tour operator who may come calling on you with a mouth-watering itinerary, a date that's good for your group, and a price you think you can sell. Assuming you've done your homework on checking out the operator for recommendations and reliability, this is probably the simplest method. This method means that someone else is doing all the operational work—booking hotel accommodations, reserving the motor coach, setting aside the air reservations, reserving step-on guides, selecting the meal plan, and picking social events or other enhancements. They're also doing the finalization: sending in rooming lists, submitting flight manifests, briefing the tour manager, etc.

This leaves you free to spend the bulk of your time on marketing and s-e-l-l-i-n-g rather than on the details of operations. If you are somewhat of a novice in tour operations, or if the trip is to a destination with which you are unfamiliar and which you don't feel confident in booking directly, this is certainly the most reliable method. It also gives you the advantages of being able to depend on the tour operator's expertise and getting bulk pricing through his clout with the hotels and other suppliers. Another advantage is that in many cases you may not have to put up large advance deposits to hold group space.

There is also the legal advantage of not being considered the "principal," but rather the "agent" of the principal (the tour operator). And in the event of something going wrong, by booking through a U.S. based tour operator, if your organization were sued by an unhappy trip participant, you'd have one more company to share the defense within the U.S. court system.

Of course, there are disadvantages in this method. First of all, it's not "Your Tour," it's really the tour operator's tour which he has sold to you and your group. Major decisions on itinerary operations, pricing, selection of suppliers, and so forth are at his discretion, not yours. Also, if you have elected to buy into a regular published tour, you will be selling it at exactly the same price as the published price precluding your increasing or decreasing the price. And the number of complimentary trips is also at the operator's discretion.

Go It Alone

The second method of booking a trip is to act as the tour operator and book everything yourself directly: hotels, flights, sightseeing, motor coach, step-on guides, meals, social events, and so forth. This can be extremely time consuming and labor intensive and requires knowledge of suppliers. You will be operating and selling the trip, so you will need more personnel or more



time of your present personnel. However, many group handlers like this method, particularly for one-day or short domestic trips. You will want to check that your organization has adequate liability insurance and/or insist that your trip participants sign waivers of responsibility, as you are assuming more legal responsibility as the principal.

Other disadvantages of this method include not having anyone to turn to for their expertise and perhaps having to put up extremely early airline and hotel deposits (thus requiring adequate cash flow on the part of your office). However, many people involved in putting together group trips prefer to “Go It Alone” in this way, because it gives them more freedom in itinerary design, more control over the planning process and also because they assume they may be able to get things cheaper by eliminating the tour operator middle-man. However, you may not be able to get the same low rates from suppliers as tour operators who are handling more in volume and who may already have a track record with suppliers through years of a relationship.

Custom-Designed Itineraries

The third method may be the best method, marrying the advantages of working through a recognized tour operator while asking the operator to modify the itinerary and customize it to your needs—something some operators may be prepared to do, and others not. A variation on this theme would be a totally custom-designed trip, not similar to any of their standard itineraries. This kind of arrangement is particularly appropriate if you want a special-interest itinerary or a trip wrapped around a convention or special event. Also, tour operators may be able to get you tickets to special events such as Mardi Gras, Carnival in Rio, the Floriade and similar festivities that you, as a small unknown, may not be able to obtain yourself. Any of the foregoing methods are appropriate, depending on your particular needs and circumstances. Do what’s best for your organization.



Negotiating Great ‘Deals’ for Your Group

Nowadays no one simply buys services from a supplier. They negotiate them. While you don’t want to sound like you are quibbling with a supplier, knowing what to ask for indicates to the supplier that you’re a professional. If you don’t ask for certain benefits for your group, you may not get them. So, before you contact any supplier to request space, make a wish list of what you’d like each supplier to provide for your group. Start by asking about special rates for seniors, for students, for mid-week travel or whatever the case may be. Also ask about off-season dates and long stays or for special markets such as families.

Many times, if you are working with a travel agent or tour operator, they will negotiate with suppliers for you. Most tour operators are extremely knowledgeable about this, and travel agents that are accustomed to handling groups similarly may be adept at negotiating group needs. But, if you are doing the tour yourself, booking suppliers directly, then you need to learn the fine art of negotiating.



Negotiating With a Cruise Line

The first thing to remember when negotiating with a cruise line is that they need your group—but they need it when they need it, not necessarily when you need them. You're going to get a better "deal" in the Caribbean in summer and fall (hurricane possibilities) than between mid-January and Easter when all the snow birds from Chicago, New York and New England are fleeing winter blizzards.

Mexican Riviera cruises at Christmas and Alaska cruises mid-summer are not going to bring your best offers; in fact, you might be lucky to get any space at all during these peak times. So, your opening question should be "When do you need us?"

What are some of the things that should be on your wish list? How about a hefty discount for starters? Or, if dealing with a cruise line that insists they don't discount, ask for an amenity package. This might include free wine at dinner or a bottle in each cabin. It might include tips pre-paid to shipboard service personnel on your clients' behalf.

It might include a complimentary shore excursion. How about a shipboard credit—redeemable in the ship's bar or boutique? Of course, one of the best offers is an upgrade to a better category of cabin.

Other things you should have on your wish list would be promotional assistance such as sharing brochure printing costs or helping to defray the cost of your direct mail or advertising. Of course, an extra commission (referred to as an override commission) is always welcome.

Remember that promotional monies paid by the cruise line "up front" (that is before the cruise) are more valuable to you than after-the-fact overrides. This is because if a cruise line is putting money out for promotion before the trip, it is taking the financial risk with you; if your group does not materialize, the cruise line would lose their expenditure. On the other hand, additional monies they pay as an override when the group has succeeded are only paid IF the group does succeed. If the trip does not sell well, your organization loses its promotional investment monies and the cruise line loses nothing.

Other things you might negotiate could be a private welcome party on board, or a more generous complimentary formula. For example, off-season you might negotiate one free berth for every 10 or 15 passengers. During peak dates you might be lucky to be offered one free berth for every 30 or 40 passengers.

Be aware that the cruise line will set stiff deadline dates which you'll need to meet. Off-season on a soft sailing, they might let you hold on to unsold cabins until 60 days before departure or even later. On peak dates they might demand that you return unsold cabins as early as six months before sailing dates, thus precluding late sales on your part. The cruise line is interested in the group that firms up well in advance.

Negotiating With a Hotel or Resort

The secret here is to book resorts mid-week and downtown city hotels on weekends. Always deal with the sales department, not reservations. Explain your total group needs such as sleeping rooms, meeting rooms, meals, welcome or farewell parties, cocktail get-togethers and so forth. The hotel is interested in selling more than just sleeping rooms; the total package interests them.



Negotiating With an Airline

It's often possible to negotiate special group rates and conditions with an airline on your group's behalf—usually premised on a specific minimum number of passengers traveling on the group flights throughout. If you will have participants who may want to travel on their frequent flyer miles or who wish to deviate from the group dates and flights, this can constitute a problem. Stick to one airline for a given tour. If you jump from one airline to another on the same trip, no one carrier gets enough of the business to give you a decent rate as they have to dole out interline payments to the other carrier(s).

Try to plan your trip to travel mid-week, as weekend rates can often be higher. Be aware that the airline will issue a contract, often requiring a deposit (usually \$100 per seat for international travel, perhaps \$40 to \$50 per seat for domestic travel). Usually the deposit is refundable IF one cancels down unused space 90 days in advance. And sometimes they will allow you to keep a small percentage of the seats for later sales. Most airlines require that tickets be issued and all unused space be released no later than 30 days before departure. If your tour operator or travel agent is negotiating the air portion of the trip, don't be surprised if they then ask you for early deposits and tour finalization so that they may, in turn, comply with the rules and regulations the airlines have demanded of them.

You may wish to get quotes and conditions from several airlines, if more than one airline serves the destination you have in mind. I have found as much as a \$200 difference at times between one carrier and another.

Be sure to ask for as many free trips as you can get (referred to as “comps” for complimentary or sometimes called TCs for tour conductor tickets). In some cases you may be able to get a less expensive airfare for everyone without any complimentary tickets. In this case, simply plan on buying a ticket for your group leader and prorate the cost of that ticket into your tour cost at the time of pricing the trip.

Hone Your Negotiating Skills

Practice negotiating. At first you may feel that it isn't “nice” to ask for things. But you'll soon learn it's expected of you. And remember, you're not asking for yourself, you're asking for your group. That way it's easier.



The Professional Way to Deal with Tour Operators

Many times you book your organization's tour direct. You request space with hotels, airlines, motorcoach companies and other suppliers yourself, and then oversee the deposits, payments and reservations.



At other times you may decide it's in the best interest of your members to book space for them with a tour operator. Often you book a specific number of spaces for your group on an existing tour. Or, you may ask a tour operator to custom-design or modify a tour specifically for your organization.

No matter which method you select, you want to appear professional when you deal with tour operators. You'll want to negotiate the best "deal" possible for your organization and your travelers. Ask the right questions, so you'll have the answers you need before closing the deal. Here are some tips:

The first rule is to start early—normally 10 to 12 months in advance for a major international tour. You need the lead time to iron out all the questions and concerns and to get your promotional materials ready, so you'll be able to announce the tour about nine months in advance. Shorter, domestic tours can be promoted with less lead time.

Check Out Potential Operators

Search for one or more tour operators you want to evaluate. One source might be one of the established tour organizations such as the National Tour Association (NTA) or the United States Tour Operators Association (USTOA). You might also consult the sales department of a major airline into that destination, or convention and visitors' bureaus in the cities/regions you want to visit. Have other travel planners—or your own experienced travelers/group members—had good experiences with particular tour operators?

Before you settle on any tour operator or specific itinerary, **check out the reliability** of the tour operator you're considering. You don't want to select an operator on price alone. What you want is a reliable operator who is going to come through for you with a travel program that will prove successful.

Check Insurance and Legalities

How much liability insurance do they carry? Do they belong to a consumer protection plan such as the NTA's or USTOA's? Are they members of the American Society of Travel Agents' (ASTA) Tour Operators Protection (TOP) Plan? Do key members of their staff hold the Certified Travel Counselor advanced study designation of CTC, or NTA's Certified Tour Professional (CTP)? Will the operator give you referrals of other organizations which they have handled in the past?

Some tour operators are "ARC Appointed." They are appointed by the Airline Reporting Commission to issue air tickets in conjunction with your tour, which means one-stop shopping for you. In some cases, airline tickets may not be required for your trip or you can buy them from your local retail travel agency. Do be aware that many travel agencies no longer automatically receive airline commissions, so do not be surprised if they charge you a service fee.

Be aware that many states now have laws governing the sale of travel. For example, the California Seller of Travel Law requires that anyone selling travel register with the state attorney general's office and acquire a registration number called a CST number, which must be published on all promotional materials of that company.

This law requires that the travel company in question carry a certain amount of insurance and participate in the state's established restitution fund. Can you imagine how terrible you would



feel if you sold a group on to a tour of an operator who defaulted on you financially? Have your organization's attorney check your state's travel laws, and see what requirements tour operators must fulfill.

Once you've determined the reliability of an operator, work with this operator to select a trip itinerary and departure date for your group. Be flexible! You may have your heart set on Alaska in July, but don't expect a great "deal" in July. You'll be able to negotiate a much better deal for your group in the slower months of May or September.

One of the best hints I ever received was from a company president who told me, "Ask where the company needs your business. You'll be able to negotiate a much better arrangement than if you go into the discussion with your mind made up."

Be Specific About Details

Is the price quoted to you net or gross? (Gross usually includes a travel agent's commission). What expenses are not included in that price (taxes? tips? certain meals? Ask!). How many full-paying tour members must you provide to guarantee that price? Is a free trip for your organization's leader offered? If so, how many tour members must you provide to guarantee that free trip? And, is the free trip in a twin-bedded room sharing with another member of the group or is it in a single room?

What amount of deposit is due in advance? Are deposits non-refundable after a certain date? How close to departure date may you hold unsold space for late sales? Many tour operators may require that you release any unsold space early—60 to 120 days before departure—thus precluding late promotion and sales on your part. The more popular the tour itinerary and dates you hold, the earlier you'll have to release space. On major tours, most operators require that you finalize and pay in full no later than 60 days before departure.

Verify if the space you are being offered is what is referred to as "sole occupancy," meaning that your organization is taking over an entire departure date. Or, are you buying into an existing departure and your people will be mixed in with travelers who are not members of your organization?

Having sole occupancy means that you can sometimes ask that the itinerary be modified to your group's needs a bit or that you can add in additional features and mark up the tour price to reflect these additions. On the other hand, if you are buying space on an existing tour, your group cannot be charged a different price than the standard published price. You don't want one of your tour members to be sitting next to a tour member who is not one of your group and discover that their price was less than what your members paid. And, your organization's leader cannot "call the shots" if it's a mixed tour, because it's not really "your tour."

- ✓ The next step is to sign a contract with the tour operator. If the tour company does not offer a formal contract, insist on a letter of understanding, outlining the above-mentioned points, signed by you both. You don't want any misunderstandings to come up later. One of the major rules of group tour handling is to have everything in writing—not vague, verbal understandings.



- ✓ Throughout the entire negotiation, you will want to project your professionalism by using correct travel terminology. Free trips are called complimentaries or comps. Hotels are referred to as properties. Local city guides are known as step-ons while the individual in charge of the tour en route is called the tour manager.

If you are a novice in this, you may wish to take some travel industry training classes. Or, you may feel more comfortable if you book the tour through a reliable travel agency with experience in group handling. This agency will, in turn, handle all dealings with the tour operator for you, issue your group's air tickets, and provide the additional expertise needed.

In fact, don't be surprised if the tour operator you've selected refuses to deal with your organization direct. Some tour operators consider themselves wholesale only and will be willing to handle your group only if you work with them through a retail travel agency.

- ✓ Be sure to record your payment and deadline dates on your work calendar so you can impress the operator with your efficiency and organizational skills.

By following the above basic procedures you can feel assured that you are bringing an aura of true professionalism to your role as travel planner for your organization.



Should You Include Meals On Tour?

Many of us who provide great trips for our tour members wonder if and when we should include meals on tour.

Numerous tour operators feel that including meals is important, even if it does increase the tour cost considerably. Other operators prefer to offer a lower tour price and let trip participants fend for themselves, purchasing their meals as they go along. However, many folks prefer to know in advance the cost of their trip, and don't like to pay for meals en route.

But cost is not the only factor to consider. Health, efficiency, dietary restrictions, safety and social interaction must also be evaluated. Tour members often rely on you to pick the best places to eat—for value and service, and they often enjoy the camaraderie of eating with a group. When meals are included they don't have to worry about finding their way to the restaurant or figure out a tip.

On the other hand, if you include all meals, highly independent travelers may feel confined if they can't strike out on their own to discover local spots, try regional specialties and order exactly what they want.



Breakfast

Many hotels feature self-serve buffet breakfasts. Buffets allow one to pick and choose the items suitable to each individual's diet.

Some U.S. and overseas hotels offer a continental breakfast or an American breakfast. Continental is usually coffee with a croissant or sweet roll and, with luck, juice. American breakfast, on the other hand, is a full breakfast, often offering pancakes, omelets, waffles, bacon and the works.

My experience is that many American travelers don't enjoy a huge American breakfast, but feel "cheated" with a continental breakfast. I have found some hotels willing to negotiate an augmented continental breakfast—that is, coffee, juice, a croissant or similar, plus cold cereal with fruit.

Lunch

The options for lunches are more varied and require more planning. If touring in the countryside, stopping at a small-town crossroads to let 40 tour members invade the one and only restaurant can be a disaster. A restaurant which is not expecting a group may not have enough help, nor enough meals. And, if in a foreign country wherein each member selects from a menu in a foreign language and has to pay the server directly in foreign currency, it can take forever, straining your patience and delaying the day's schedule.

On the other hand, stopping in a good-size town where tour members have the option of several restaurants, delis or cafés, and with sufficient time, may work well.

Or, you might pre-plan an included lunch at a specific spot. Order a set menu in advance, and pay for the entire group's meal, including appropriate tip. This kind of luncheon can become a festive social event as well, perhaps combined with a local folklore performance or similar activity. A disadvantage of this arrangement is that participants must eat what's served; there are usually no menu substitutions.

With today's technology, planners can call ahead while still on the motorcoach to a restaurant, letting them know the arrival time of the group, and can even order in advance (if working from a limited choice menu, or ordering fast food for a picnic or other informal meal).

Dinner

The last meal of the day also presents many options. Members usually eat in the hotel dining room because it's easy and they are tired at the end of a long day. Quite often the tour operator is including the hotel dinner as part of a meal-plan which is a much "better deal" than if the members were to buy the meal separately. There's an increasing trend, as well, for evenings on tours to have a meal plus live entertainment—a dinner show, a concert with a picnic or other featured event, all folded in as part of the tour cost.

All in all, probably the best arrangement is to include a number of meals but not all. Leave some meal times open to give members a bit of freedom—freedom of menu, freedom of budget and freedom to select restaurants of particular interest.



Welcome and Goodbye

Do always include a welcome lunch or dinner; it starts the tour off on the right note. And do always include a farewell dinner party; it wraps things up well with festivity and nostalgia at the end.

I usually budget in a little extra for wine, flowers and maybe a bit of music for this last night. Sometimes I write a poem about the group and read it the last night or give a short farewell speech. You want them to go home with happy memories, anxious to go on the next trip with you and your organization.

There's no set rule for the perfect number of meals to include on a trip. Keep in mind past trips and the feedback you've received from your travelers. Even adventurous travelers may feel more comfortable with inclusive meal plans in a foreign or unusual destination. Meals are among the elements travelers tend to recall most, so make sure they are pleasant.



Chartering a Motorcoach

For many one day or short over-the-road tours, you are chartering your own motorcoaches. Perhaps you've been using the same coach company for years and continue to be pleased with them. On the other hand, you may be searching for a reliable coach company.

If contacting one or more companies, there are questions you should be asking them rather than just basing your decision on price alone.

Check the legalities and the reputation of the company. Does it have proper licensing for intra-state, or, if you plan to travel out of state, for inter-state usage? Does it have permits for drop offs and pickups at airports and cities you plan to access? How much insurance does the company carry on any one accident? A million dollars in accident insurance may not be enough. If this is the first time using this coach company, ask for references.

47, 52, 55, 59 – It's Not Bingo!

Verify the number of seats on the coach. Of this total number, how many may you actually sell? Eliminate from your count any seats you must set aside for tour leader and step-on guides. Also you may not wish to sell undesirable seats such as those across from the restroom or the back row or any which don't recline fully.

What special features does the coach offer, including restroom, air conditioning, tape deck, big picture windows, shades or curtains, VCR, refrigerator? A microphone and public address system are musts.

Baggage space may not be important for a one-day tour or even for a weekend trip. But for longer tours, give careful thought to adequate space for your group's luggage. If each person is



permitted to bring only one suitcase, plus a hand-held carry-on, this is usually not a problem. If each person is permitted to bring two suitcases or if you anticipate a lot of en route shopping, can it all be accommodated?

Query about the driver. Will it be a driver only? Or, will it be a driver/narrator/guide combined? Can you be assured of the same driver throughout the trip, or will you be assigned a different driver each day? It makes for continuity and a friendlier atmosphere if you can have just one driver as he/she gets to know your group and vice versa.

Get it in Writing

The cost quote should be in writing. While a company can usually give you a verbal “ballpark figure,” in order to give you a firm quote, they’re going to need some specifics from you first. Tell them the exact number of hours you’ll need the coach daily and where you plan to drive each day. Price quotes depend on time and mileage.

Many laws and union regulations specify the number of hours your driver may drive. Sometimes there are regulations on the maximum number of miles or specific driving locations allowed. I recall receiving a contract from a coach company on the Big Island of Hawaii stipulating that the coach was not permitted to take dirt roads! Explain your day’s activities carefully. Hours of driving beyond those for which you have contracted will add to your final bill.

The contract should clearly specify whether the driver’s expenses for overnight accommodations and meals are included in the cost quotation. It can come as a nasty surprise if you discover you’re supposed to book the driver’s room and pay for it as well as his meals, and you didn’t cost it into your tour budget from the outset.

Verify that all expenses, like road and bridge tolls and nightly parking of the coach, are included in the cost.

Payment Schedule

One of the most important questions pertains to payment schedule and the company’s policy should you cancel the trip. Many coach companies nowadays require a small up front good faith deposit to definitely put a “hold” on a coach (and for busy times, it’s important that you do, indeed, put a firm hold on a coach). Know the date of final payment and cut-off date by which you’d have to cancel the coach reservation should it become apparent that the trip is not selling well. Now is the time to ask if you can reserve a smaller coach and still operate the trip. You’ll need to know this cut-off date before you publish the tour cancellation and refund policy in your tour brochure or other promotional material.

Other things to consider are a company’s policy in case of en route coach problems such as breakdowns, repairs, sending a substitute coach, or dealing with a faulty public address system or air-conditioning unit. It’s usually advantageous to deal with a company that has a large enough fleet to replace your coach in case of serious problems. A small company may have affiliates or alliances with companies to provide backup services.

Once you have your cost quote and contract in hand, as a financial safeguard, don’t price your tour on the assumption that you’ll totally fill the coach. Better to prorate the cost of the coach



charter over 20 participants or whatever number you think is reasonable to sell, rather than risking that you'll sell all 40 seats.

Chartering motorcoaches is one of the most important facets of the trip planning process. The safety, comfort, and success of your trip can depend on it.

Questions To Ask When Chartering a Motorcoach

In addition to the procedure suggested by the author, the following questions have been provided by the California Bus Association.

1. Are you licensed with the state department of motor vehicles and with the Interstate Commerce Commission?
2. How many years have you been in business?
3. Tell me about your driver training and safety program.
4. Do all your drivers wear uniforms?
5. How many motorcoaches do you operate?
6. What is the average age of your fleet?
7. Tell me about any other services you offer customers.
8. Do you have a money-back guarantee?
9. Are there any other additional charges I may be billed for following the trip?
10. Do you carry the minimum \$5 million dollars of required insurance (as set by the PUC or DOT)? Can I as the planner be included in that coverage?
11. If I get a lower price from another carrier, will you do better?
12. How much deposit is required?
13. Do you allow food and beverages on board?
14. Do you sub-contract any of your trips?
15. To what trade associations do you belong?
16. When may I visit your office to inspect the equipment we'll be using for our trip?

Executive Director Suzie Petersen, based in Castroville, CA, also suggests planners use the Web to search for bus companies and their safety record with the Dept. of Transportation: www.safersys.org which can be researched using bus company name or DOT authority number.



Booking Group Hotel Reservations

While many travel planners arrange their group hotel reservations through tour operators as part of a total package, there are times when you may be dealing directly with hotels, particularly on short local trips when you act as the tour operator. It's important to be professional and careful in dealing with each hotel.



Starters

Begin with the hotel's group sales department, not the regular reservations department. Advise the sales manager exact dates desired and maximum number of rooms needed. Ask for their best group rates. Understand that you'll never get as low a rate as a major tour operator gets, due to the volume of business that company books at a hotel. For best rates, use hotels which cater to corporate business if you need weekend dates, and select weekday dates at resorts and vacation hotels. Always mention if yours is a senior group or student group and ask if the hotel has a special group rate for these markets; be flexible. Consider changing dates if the hotel can offer you a better rate on a different day.

Sound professional by using correct hotel terminology. Doubles mean a double bed. Twins mean two beds and double-doubles mean two double beds in the room. Singles may mean a room with one bed in the room; in most newer hotels that means a twin or double occupied by one person only. To avoid misunderstandings, specify dates as in and out dates. For example, say "In Jan. 5 and out Jan. 8 for three nights," rather than saying "From Jan. 5 to Jan. 8."

Be sure to get a quote on the total rate—that is, the per night cost of the room, the amount or percent of tax, and any other fees. For example, some European and resort hotels add a "service charge" which is supposed to be in lieu of tipping for service personnel such as room maids and other behind-the-scenes staff. Ask for a complimentary room (called a "comp" or a "TC" for tour conductor) for your tour escort. Is there a special rate (or free meals) for the coach driver?

Articulate Details

Give the hotel the full picture at the outset as to what other services you may be buying from them. You may get a better rate on the sleeping rooms if you also use a meeting or hospitality room, schedule a banquet or include daily meals. Can you show them that tour members will be using their restaurant or lounges? Hotels want profit from all of their departments.

Also negotiate baggage handling roundtrip, per person or per bag. What would be your check-in and check-out times? Do you need a lounge for early arrival or late departure?

If you are going to be staying at several locations, you may want to work with the regional sales office of a hotel chain. The group rep knows the players and the properties and will help you negotiate with properties in multiple destinations.

Foreign hotels quote rates in their currency. Be aware that this rate can change if the exchange rate of the two currencies changes between confirmation date and the date you actually pay the hotel. You may want to budget a small "cushion" into your tour costing to protect yourself, because it is embarrassing to have to raise the trip price once it's published.

What makes a hotel good for groups? Location is important. Downtown near shops and restaurants in a safe area where group members can walk is great, but often means rooms will be more expensive than at suburban or highway hotels. On the other hand, limited service hotels often include breakfast and are within walking distance of a restaurant, making them economical, especially if the group will not have much leisure.



I like hotels that are accustomed to dealing with groups and do it efficiently. Do they offer pre-registration so your group skips long check-in lines, do they have enough staff to expedite luggage handling, are there several elevators?

Probably the most important thing for me is assurance that all members will have comparable rooms. Tour leaders dread hearing, “Why does so-and-so have a big ocean-view room and I have this tiny room overlooking the garbage area?”

Avoid a booking agreement with “Run of House” wherein a hotel promises to upgrade guests if better rooms are available at check-in. This works only when the hotel can guarantee that everyone will be upgraded. If some are and some aren’t, you can be sure you’ll get complaints.

You may also want to make the hotel aware of certain needs which may or may not be necessary for your particular group. Ask about rooms close to the elevator for those with walking difficulties, special facilities for anyone in a wheelchair, or telephones which can be amplified.

Review hotel amenities—free afternoon tea, pool and spa, daily newspapers, in-room coffee makers, etc.—which you can mention in your tour publicity. All these extras add to the value of the stay. Some properties have discount tickets for area attractions.

Get it in Writing

Get everything in writing from the hotel. Usually this will be a formal contract, which must be signed and returned to the hotel by a set date. Double check the contract when it arrives to be sure everything is spelled out according to your understanding. Write on your calendar the review dates which the hotel has set (usually 90, 60 and 30 days before arrival). Double check payment requirement dates and the last date to cancel without losing money. Enter these important dates on your calendar. Hotels which don’t know you may ask for a one night deposit at the contract signing. Others may be willing to accept the deposit later if you negotiate skillfully.

Be prepared to start releasing unsold space if you are not selling it. It’s common courtesy and the mark of a professional not to “dump” space at the last minute. At 60 days before arrival, I usually release space I don’t think I can fill. Most properties require a final rooming list (with passport information nowadays for international hotels), release of unsold space and payment in full 30 days before arrival. Updates can be sent closer to your arrival date. You have to know your group and their booking patterns. Hotels will do all they can to provide you with needed rooms should you get last-minute bookings for your program, but you can’t count on this.





Put a Little Rail in Your Life

Have you considered rail travel for your groups? A trip by train can be as short as a two-hour segment inserted into a day's program or as long as the seven-day trans-Siberian Express from Vladivostok to Moscow. But whatever rail segment you select, it can make for a truly innovative travel experience that has appeal to many.

Those who may recall the glory days of traveling from Chicago to California on the California Zephyr will find the nostalgia of train travel a strong draw. Rail travel is also a perfect kind of offering for family intergenerational trips—an opportunity for parents or grandparents to share the excitement with a child or grandchild.

It's also a wonderful mode of traveling scenic areas like the Canadian Rockies or the Oregon/California coast. It's appealing as an alternative to motor coach travel, permitting riders the freedom to move about the train, eat in the diner, and meet and chat with other travelers, not being "glued to your seat" as on a motor coach.

In some countries it permits one to travel with the locals. I recall a wonderful experience traveling between Paris and Barcelona, meeting a Catalonian family who generously shared their wine, bread and cheese with me en route. They subsequently became daily companions during my stay in Barcelona and life-long correspondents.

Rail travel also allows one to cover long distances in an easy way—in some cases in lieu of air travel. Many Americans, leery of air travel since 9/11 and dreading the long waits at the airport and the hassle of security clearance, welcome a trip nowadays advertised as "No Air Travel Required."

Short Stints

Short rail trips are available in many parts of the U.S. Green Mountain Railroad in Vermont offers special scenic "Green Mountain Flyer" trips, some featuring special holiday adventures such as the Easter Bunny Express, a Mother's Day excursion, and a Santa Express. They utilize vintage cars dating back to the '30s. Fall excursions to see the autumn leaves are also very popular (and sell out early). The Upper Hudson River Railroad offers a two-hour trip through the Adirondacks and along the Hudson River. Check their schedule for special summer events like the train robbery. And in Northern California, tour operator Key Holidays offers short one- and two-day trips to Yosemite from either San Francisco or Los Angeles, as well as its famous weekend "Fun Train" packages to Reno.

AMTRAK and VIA Rail - Your New Best Friends

If planning rail travel in the U.S., you'll most likely be working with Amtrak (or a tour operator or travel agent that sells Amtrak). While most railroads in the U.S. are privately owned (as opposed to Europe, for example, wherein they are government owned), reservations and



ticketing are usually handled by Amtrak. That's the National Railroad Passenger Corporation. In addition to selling rail tickets and rail passes, they also have cooperative arrangements with tour operators who put together package tours that combine rail travel with hotel stays, sightseeing, meals, and other tour inclusions.

And as Amtrak is to the United States, VIA Rail is to Canada. While its routes span the country, its most popular train is the *Canadian* between Toronto and Vancouver: Ottawa, Winnipeg, and through the Rockies allowing one to visit Calgary, Banff, Lake Louise and Jasper. Its great domed cars make for breathtaking scenic viewing and summer tickets are booked far in advance. Operators like Brewster and others offer a panoply of itinerary possibilities combining rail, motorcoach, and hotel/lodge accommodations along the way.

Rail Europe and More

Well-known rail experiences with a reasonable price tag include the breathtaking (and nearly vertical) Glacier Express in the Swiss Alps and the trans-English channel Eurostar through the "Chunnel" between London and Paris (or Brussels).

Both are available through Rail Europe, the convenient U.S. based marketing arm for rail products of most European countries. They also handle the popular Eurail passes. Other short and not astronomical rail trips include the Copper Canyon trip between Chihuahua and Los Mochis, Mexico and the famed Bullet Train (Shinkansen) between Tokyo, Kyoto and Osaka with views of Mt. Fuji on a clear day.

Something for Everyone

One of the beauties of rail travel is that once you've begun to "Think Rail", you'll find a wide variety of possibilities. The trick is to find the trip that's right for your group. You might even think of a combined rail/cruise, giving your participants the option of taking the train to the port instead of using the cruise line's air connections.

While trips by private motor coach may be the easiest and least expensive way to operate a group trip, they do not always make for the most innovative trip. Those of us who design tours for a living find that the tour experience is usually enhanced by breaking up the modes of travel - coach, boat, and rail, even if it does increase the tour cost. Try your hand at it; your travelers will like it.

Hints to Your Rail Passengers

If you decide to include rail travel in trip offerings to your groups, pass along these hints to your travelers:

- (1) Portage may be virtually nonexistent in many rail stations, so everyone should bring a suitcase on wheels that they can handle alone;
- (2) Prices for meals in the diner are in line with meals in a fine restaurant so one should plan the personal en route budget accordingly;
- (3) There may be plenty of walking through rail stations and to and from trains;
- (4) Some rail trips include areas of high altitude (the Copper Canyon, for example, at over 8000 feet). Tour members with a history of cardiac or respiratory problems or extremely high blood pressure should be advised accordingly.





CHAPTER FOUR

Dealing With Niche Markets

Dealing with niche groups gives you the advantage of locating travel programs (or designing them from scratch) to meet the needs of special markets.

In this way, you can offer trips that will appeal to particular markets such as seniors, women-only, families, youth, “boomers”, or adventure-lovers, for example. This is much easier than trying to offer what I call “generic” itineraries, designed to appeal to the general public, but often not really appealing to anyone in an effort to appeal to everyone.

Read on for trip ideas (and the psychological reasons behind them) for some of these different market segments.



Trips for Women Only?

Are we prejudiced against men? Absolutely not. A great many of our trips are for both men and women. But, if your trips are like mine, you may have noticed that a large percentage of the participants tend to be women—sometimes traveling with a spouse or partner, sometimes traveling alone. If that's the case, why not designate one of your trips each year as a “Ladies Only” departure? I do just that. Design it around women's interests and market it solely to the female of the species.

Of Women's Interest

If you're going to try this, you need to know what women are looking for in a trip just for them. I find a multitude of reasons women are drawn to such trips—some obvious, some subliminal. The first is safety—the feeling that there's safety in numbers, that the trip will be fully escorted, and that they will feel comfortable in certain social situations. For example, many women may not like going into a bar by themselves, but as a group, may enjoy meeting for an after-dinner nightcap with the other members. If recently widowed or divorced, they will not feel that they are competing for male attention. There's also the factor that they can tell their husband that they're going with other ladies only, which often softens the blow to a man's ego if “his woman” wants to go it alone without him.

Another reason is that women are often more interested in features in different areas or countries that are important to families or that men don't wish to explore. This would include social issues such as children, schools, education, marriage, divorce, and relationships. Women are also interested in fashion, clothing and shopping for gifts for family and friends (and for themselves). Cuisine and cooking are often of great interest. I have had good luck taking groups to food markets, to cooking classes and meetings with known chefs.

The arts also are attractive to many women. They enjoy going to the theater, dancing, seeing the symphony, and visiting art museums—often more frequently than the men in their lives are willing to attend. Home décor is also of interest, including arts and crafts, gardens, architecture, ideas for home entertaining, and so forth.

Women Love to Luxuriate

Most ladies I've known also love to be good to themselves—spas, a manicure here or pedicure there, beauty treatments, facials, whatever—they all add up to a wonderful feeling, regardless of age. Often this is something a woman may not do for herself at home or if she does, she may feel guilty spending on something “frivolous” for herself when she feels she should be spending on something for her family.

There's also the aspect of camaraderie with other women, perhaps of discussing some of life's problems with others who may have good advice. I've had women tell me that sometimes a trip



takes one back to the teenage years of slumber parties and whispering your innermost secrets to a girlfriend.

Packaging Trips

Whatever the psychology behind such a “Ladies Only” trip, it will take two important requirements on your part. The first is to design an itinerary that sounds mouth-watering to them—not just attractive, but enticing, a dream come true, a trip they couldn’t possibly do by themselves.

You’ll want to keep it no longer than nine days. In this way you’ll get women from different walks of life. The married woman can come along telling her family that she’s going away on a short, one-week “be good to herself” trip but that she’s saving plenty of time for a vacation with her family later in the year. A single career woman can get away without feeling she may be out of touch with her office too long.

The second requirement is to market it appropriately—as something sounding private, invitational, something they can’t find on the open market and can’t compare with a “public tour.” Try it. You may find a successful avenue to a market you didn’t know you had.



Preparing for the Baby Boomers

Here they come—the Baby Boomers—nearly 78 million of them. Are you ready?

Probably not. Many of you have heard all the negatives about them and closed your ears. You’ve heard they’re self-centered, the “me” generation. You may think that if you don’t plan for them, maybe they’ll go away. And that may be just what they’ll do! But if you want them on board, then you need to stop and analyze who they are, what they expect of a travel experience, and how you can provide it.

Don’t assume you can simply fold them into your existing trips. I repeatedly hear comments from trip providers such as, “It’ll be nice having some younger seniors joining our senior tours. We’re losing some of our travelers and we need some new blood in our ranks.” They may not wish to be folded into your existing trips.

Who are the Boomers?

Statistics tell us that “baby boomers” are those born after World War II between 1946 and 1964. That means we now have boomers as young as 46 and as old as 64. The older ones are now approaching retirement or already taking retirement. Some are doing both simultaneously—taking retirement, but continuing to work.

Younger ones, on the other hand, may still be raising children, paying mortgages, and putting kids through college. Both groups may be considered “The Sandwich Generation,” those whose lives are spent dealing with their children and their aging parents.



Statisticians at Metropolitan Life Insurance Company break them into two major groups: younger and older boomers. They label “Older Boomers” as those born between 1946 and 1955—a total of nearly 22 million households (not persons) with an average annual household income of nearly \$59,000. They consider “Younger Boomers” as those born between 1956 and 1964—approximately 24 million households with an average annual household income of \$56,000.

Different Demographics

But raw numbers don’t tell the full story. Hints at how their lives differ from the travelers we may have been serving in the past may give us some guidance for the future. Many of us as group operators are used to handling groups with more women than men, mostly retired, many widowed. Boomers, on the other hand, are often divorced (14 percent) or never married (nearly 13 percent)—significantly higher than prior generations. Nearly 17 percent are minorities. And the level of education is higher than any previous generation as almost 29 percent have a B.A. degree or higher and close to 89 percent completed high school. Boomers are not nostalgic for the Big Band music of the ‘40s but perhaps for disco or folk music. They don’t talk about invading the beaches of Normandy; for many, Vietnam was the defining issue. They weren’t trained to clean up everything on their plate because many families “over there” don’t have enough to eat. Rather, they indulged in quick, take-home prepared meals enabling working moms to throw dinner together quickly.

As they age they’re not necessarily slowing down or looking for sedentary activities. Many are already well-traveled and interested in continuing to do so. A great many have already done the traditional tour to Europe and are now ready for more in-depth visits to more exotic destinations. They’re looking to successful programs like those of Elderhostel (now called Road Scholar) that zero in on a destination for a week or two with knowledgeable lecturers.

They Don’t Accept Aging

One thought that often prevails is that boomers do not want to accept that they’re aging—they fight it every step of the way. They exercise and participate in as active a lifestyle as their time and energy permit. They do not enjoy sending e-mails to one another with jokes about memory loss. In fact, many have dumped e-mail in favor of texting and social media.

And, they have no sense of guilt about indulging themselves in spas, and beauty treatments. Cruise ships have responded well to these needs by offering on-board wellness programs, healthier meal offerings, and enlarged spa and exercise offerings. Tour companies have not been as responsive.

Couple all this with a market that has been mobile, highly independent, and accustomed to last-minute decision-making. They’re not used to being told “no”—that it can’t be done. They have often been in charge of their own travel itinerary rather than blindly accepting someone else’s travel plans. And they have no hesitation about sitting down at their home computer and booking their own trip on the Internet. They look forward to experiencing things themselves—even if it means making mistakes.

How does all this translate into your future trips? Read on!





Plan for Flexibility to Attract Boomers

Bearing in mind that the oldest boomers are going to be age 64 and the younger ones may be as young as 46, your trips need to reflect their needs and wishes—both real and perceived. And, if in recent years you have been designing trips for elders, it's time you sit down and think about what would interest and attract travelers in this new age group and mind-set.

Plan for Education

You'll want to design trips that are more active, more in-depth, and less regimented. Since some of your market may still be employed, eschewing full retirement until later, you'll probably want to forgo the longer trips and offer more one week or 3-4 day long weekend type programs. And, since statistics show that nearly a third of your travelers will have at least a B.A. degree, ensure that a number of your offerings have intellectual content in order to hold their interest.

You may wish to confer with your nearest college or university as to how you could put together joint programs that perhaps carry a college instructor as en route educator or even stay in university dormitory lodgings rather than hotels. On a three-day trip to Ashland, Oregon, I became aware that the University of Southern Oregon required we offer bona fide lectures to our tour members in order to be permitted to stay at their dorms.

A similar suggestion might be attendance at one of nine weekly summer programs at the highly-regarded Chautauqua Institution in Western New York State.

Try Single-Destination Trips

You may want to wrap trips around one single destination rather than being on the road constantly. In that way, people can settle in, get to know their surroundings, and make day trips to nearby points of interest.

Since boomers tend to stay away from rigid schedules and prefer more freedom, this kind of plan will often have greater acceptance than a get-on-the-bus, stay-on-the-bus all day type of trip.

Another thought would be instead of merely wrapping a trip around a single destination, consider wrapping it around a festival, a sports event, or some cultural theme. Fall theater in New York? Wine tasting in the Napa Valley? How about spring baseball in Arizona? (Plan to have more men on your trips). Maybe a few days of self-indulgence at a spa enjoying a selection of face and body treatments, yoga, or spiritual renewal.

Mother Nature

And, don't forget the attractions of Mother Nature and the Great Outdoors; destinations like Costa Rica with its lush rain forests, misty cloud forests, spectacular volcanoes and waterfalls can have an appeal that man-made attractions seldom equal.



You'll need to s-t-r-e-t-c-h your imagination to kinds of trips you never thought, in your wildest dreams, that you'd undertake...a "bring along the grandchildren" weekend complete with activities for adults and children...a pre-holidays shop-'til-you-drop experience for ladies only...a five-day art and opera immersion in Santa Fe. Put on your thinking cap and come up with an idea that's right for your audience. Don't overlook hiking and more active types of trips.

A Tour with Nothing in it?!!!

You might also like to offer what I call a "shell" trip. This is a trip wherein you make available the framework or shell—the roundtrip transportation to the destination, the accommodations, daily breakfast, and perhaps one other item. Then you make available a menu of optional activities that they can take or not as the spirit moves. Or what if that New York theater trip offers each participant their own choice of plays?

This is similar to a cruise wherein one may opt to purchase shore excursions for the various ports-of-call and others may not, in accordance with individual interests and budget. Some folks like to be part of an escorted, pre-arranged city tour, for example, whereas others prefer to strike out on their own. Since many boomers are well traveled already, exploring a city on their own doesn't scare them in the least.

A few caveats. Don't offer trips to boomers that you can't operate smoothly. Since they like to book late, don't try peak season when suppliers will demand early release of unsold space, precluding later bookings. Don't offer so many options that you can't keep track and you end up with ten options per day, each with one or two people. And don't price options on minimum numbers you can't hope to reach.

All in all, planning for this new market should be bold, brave, hopefully profitable, and fun. Try it. You may like it!



Communicating with the Boomers

We all know that the "boomer" population is upon us. We may even have gone so far as to design travel programs we think will appeal to them—flexible programs, more active programs, programs with intellectual and educational depth, programs of varying lengths and interests. But do we know how to market them? Do we truly know how to communicate with this market?

Throw-away Mail

They may be those who, like me, often don't even bother to open their bulk mail, but rather simply throw it in the trash without peeking inside the envelope. Instead, we need to discover how we can reach this potential clientele not only with different kinds of trips, but at different venues, via different media, and perhaps even with different vocabulary and different ways of doing business. As the old saying goes, "Different strokes for different folks."



Reach Them Electronically

Most boomers are computer-savvy. They have used computers in their professional life, and they will probably continue to do so as they ease into retirement. It will be up to you to reach out to them in the medium in which they are most comfortable—their computer.

They most likely will continue to use e-mail as their major mode of communication coupled with a cell phone. They will probably wish to pay for the bulk of their trip via credit card, not via check. Are you prepared?

You may need to send out an e-mail newsletter. It can be something as simple as an e-mail message describing trips now open for enrollments or news of world happenings pertinent to travel. This will mean that you need to collect e-mail addresses on all trip enrollment forms and on all phone messages.

You may decide that you need to set your organization up as a merchant so that you can accept credit cards.

Websites Anyone?

If you have not yet considered having a website for your organization or your travel program, now may be the time to do so. It can be short and simple, but it should look professional. This may mean paying a pro to set one up for you and to do monthly upkeep. You may even be able to find a student in a nearby college media arts program who would be interested in doing it for you at lesser rates. Remember—a website address listed on your flyers, brochures, or ads, makes you look up-to-date, rock-solid, and aware of your market's expectations.

What's In a Word?

Long ago, I discovered that different groups of travelers utilize different vocabularies to express the same thing. For example, a half-day motorcoach tour might be referred to as a tour by the general public, as a field trip by a teacher, or as an excursion or experience by an adventure traveler. Boomers like to see words like "trip" or "travel program;" they don't like the word "tour." It implies too much regimentation.

Similarly, free time can be expressed in many ways. How about telling folks that the "afternoon is at leisure so that you may each explore the city in your own way?" Or, in describing Paris, how about saying, "Today is a totally free day for independent interests—time to explore the d'Orsay Museum or perhaps just enjoy sitting in a sidewalk café to watch the world go by." This is descriptive enough to excite them, but implies that they may choose.

Reach Out

As you can see, selling to this new market requires innovative thinking: new modes of communication, new verbiage, and perhaps a whole new way of doing business. But whatever new methods you devise, it will require your reaching out to them in ways with which they are comfortable. Try it!





Include Soft Adventure in Your Trip Calendar

If you're hoping to attract new generations, consider adding at least one soft-adventure trip into the mix on your annual travel calendar.

Today's age-50-and-up travelers are not interested in getting on a tour bus daily and seeing the world through the window. They're accustomed to walking, swimming, playing golf or tennis, and going to the gym several times a week and they wish to remain as active as possible and as their stamina permits.

They are perfect candidates for what's referred to as "soft adventure." And, if you're not going to offer it to them, they'll find an organization or company that will.

Climbing Mt. Everest, hiking 30 miles a day, sleeping outside through rain and hail, and subsisting on beef jerky and trail mix are not what they have in mind. That's "hard adventure." That may be what they did when they were age 20—the rougher the better, the bigger the challenge, the greater appeal in those days.

Hard Adventure Has Grown Up

But hard adventure grew up. The 20-year-olds are now over 50. They still love their adventure, but at a slower, more comfortable pace, ending the day at a charming inn with a glass of wine by the fire, followed by a yummy gourmet dinner. In short, hard adventure matured and voilà, we now have soft adventure. (In fact, there's now a third kind of adventure travel. I call it cultural/intellectual adventure—but I'll save that for another day.)

What are some of the differences between soft adventure trips and "regular" trips? Adventure travel tends to be outdoors, with greater emphasis on nature and rural areas than on cities. Examine any adventure itinerary and you'll note that a trip may start and end in a city, but it doesn't really spend any time there; it's just a staging point.

Adventure travel groups tend to be relatively small—some groups as small as 6-12 people—often with tiered pricing so that everyone pays less as more people join the trip. Adventure travel emphasizes interaction with local people and may, therefore, feel "less touristy." Adventure travel walks softly on the land and is respectful of the environment. Adventure travel requires that participants be more flexible—schedules and activities may change as opportunities present themselves along the way.

Adventure travel usually includes some risk, so participants will be required to sign stringent responsibility waivers. They should understand that in some areas of the world they may be far from medical help and should most definitely enroll in travel insurance—particularly medical coverage.



Soft Adventure Not Less Expensive

Surprising to participants, adventure travel is not less expensive than “regular travel.” This is because of high costs to operate in remote areas, heavy fixed expenses costed out over a small number of participants, and the expense of training and retaining exceptionally qualified tour leaders and guides.

The good news about soft adventure travel is that there are a number of excellent companies with which you can work. These companies do a wonderful job of educating and preparing your travelers for the trip by sending them all sorts of pre-trip information bulletins, clothing and packing suggestions, and so forth.

Also they are helpful in rating each trip from easy to strenuous, often listing hours of activity, miles of hiking or biking, altitude, etc.



The Value of Inter-Generational Travel

Our readers have shared with us their many successes in fulfilling their members’ travel needs. You take them to interesting places, keep them busy, provide recreation and offer intellectual growth. But is your travel program also meeting their emotional needs?

If your clientele is primarily seniors, you will find that many of them may be very independent with a full emotional life and a family of loving and attentive children and grandchildren. But others may be lonely. They may not be closely connected to family members, who perhaps live at a distance or are too busy to spend much quality time with their parents and grandparents. Travel together can often strengthen relationships and at times even heal wounds.

“The goal with inter-generational travel is to enjoy each other and share experiences,” noted Mary Stachnik, Mayflower Tours, Downers Grove, IL. “They don’t want to have to handle the mechanics, so a group tour is perfect for such travelers, since you are handling all the details for them. Inter-generational travel is the fastest growing segment of our business.”

I have had a number of tours which were inter-generational. On a tour to Provence that I escorted, an 80 year old grandmother traveling with her helpful, loving, and attentive granddaughter were a joy to have on the trip. In London, I had a dynamic threesome—a woman, her daughter and a college-age granddaughter. I also recall a woman whose daughter invited her on a trip, as a reward for completing a grueling session of chemotherapy.

Benefits for All Ages

What might be the advantages of such a trip for your members? Benefits include:

- ✓ Allowing the young to benefit from the wisdom of the old (and the old, perhaps to begin understanding the thinking of the young).



- ✓ Allowing an opportunity for talking and sharing ideas and secrets between old and young.
- ✓ Providing a fun, pleasant setting for inter-generational activities.
- ✓ Providing memories—memories for the future, when the senior may no longer be able to travel, and memories for the younger person to grow with.
- ✓ Providing a way for an older person to do something nice for a younger person, giving them an experience they might not otherwise have afforded.
- ✓ Conveying the concept of “passing the torch” from old to young. Hopefully, when the young reach their mature years, they, in turn, will want to pass it on to the generation which follows them.

Organization’s Gain

Of course, the trip must not only be successful and beneficial to your travelers, but to your organization as well:

- ✓ Expanding enrollments in your trips and membership.
- ✓ Providing a continuum of new members who may later join your organization for travel and other activities.
- ✓ Giving your organization an opportunity to reach out into the greater community and be known beyond present circles.
- ✓ Providing an interesting focal point for news coverage from the media, raising the profile of your organization and its travel program.

Getting Started

You might start with a one-day trip. Pick a weekend when younger folks are not working or in school. Plan a trip with some activity, not just a bus ride—a barbecue, a dance contest of dances popular in different eras, a fashion show through the ages or a historic theme.

Encourage elders to invite a younger family member or friend, but make it clear they don’t have to do so. You don’t want your usual travelers to stay away just because they don’t have anyone to bring or because their children were unable to participate. Consider a special lower rate for the younger guests.

If you’re ready to try a longer trip, you might contact one or more of the companies that have already done it successfully. Thomson Family Adventures (info@familyadventures.com) offers adventure vacations to such child-friendly destinations as Alaska, Costa Rica and the Galápagos among others, and even designs departures for families with teenagers. Another family-specialist company is San Francisco-based Rascals in Paradise. Many tour companies set aside certain departure dates for this specialty or will customize a trip for your group, particularly during school vacation dates.

Hints from the Experts

“Make your trips more adventurous, more active, not passive,” suggested Sabrina Lozier, Especially 4U Tours, Mesa, AZ (she’s the younger half of the mother-daughter team who run the company). “Our trips focus on the southwest and Mexico and are a natural for active seniors accompanied by intellectually curious young persons.”

Holiday trips have worked well for Heritage Tours and Travel, Stockton, CA. Katherine Setness noted, “We’ve had luck with mother-daughter trips on or near Mother’s Day. Common interest is



the key—theater or floral, for example. The same holds true for men. Trips designed around automotive interests or past military experience sell well.”

Inter-generational tours should include a mixture of activities and sightseeing with adequate free time and with special emphasis on outdoor activity, according to Christine Cimino, Collette Tours, Pawtucket, RI. “An educational component is also important.”

So, if you’re ready and willing to embrace the idea of an intergenerational trip, decide what age levels you’re going to target, start your plans well in advance, utilize your resources and go for it. You and your members will enjoy the very different atmosphere of such a tour.



Getting Men On Your Tours

Most of us who are trip planners are aware that our programs often draw many more women than men. This reflects the fact that women outlive men in our society and that women enjoy traveling in groups more than men. Women appreciate many aspects of group travel that men may not feel are important: companionship, convenience and safety in numbers, to name a few. Some men don’t like giving up the reins to the tour leadership; they miss being in control and, therefore, stay away from group trips.

Where are the Guys?

As trip planners, perhaps we should be doing more to attract men to our programs. These might be men who are solo in life: single, divorced or widowed. They might also be men who would accompany their spouses or women friends on trips if the trip components interested them and if the groups made them feel particularly welcome.

As one gentleman told me, “I don’t want to go on a trip where I have to stand around while the ladies go shopping or where I have to pick up the tab for all the women at my lunch table.” Other men have mentioned that they don’t want to go on any trip where they have to wear a coat and tie for dinner. Others have confided to me that they have health problems and don’t want to admit their lack of energy or strength to women they may not know.

So, if we know what men don’t like on a trip, do we ever stop to analyze what they do like and try purposely to include some of these features in our itineraries?

Men seem uniformly interested in how things work—engineering feats, great bridges, canals and tunnels. They’re interested in scientific endeavors and medical discoveries. They’re particularly interested in warfare: battles and armaments.



Putting a Twist on Conventional Destinations

Consider an average tour to the East Coast or southern states. Descriptions of Philadelphia may not interest them, but add the Gettysburg battlefields and their ears pick up. The antebellum mansions of the South may not appeal to them; but if you mention Fort Sumter off the shores of Charleston, they may pay attention.

Visits to museums exhibiting munitions and armor from the past eras may elicit interest. Trips incorporating sports events, a hall of fame or a spring training visit should also score with men. Activities involving aviation museums and their various aircraft—both wartime and civilian—are also of interest.

I find that men enjoy meeting men in other places in a situation where they can ask them basic questions. “What’s the price of a house here? What kind of work is there around here? What does gas cost here?” Practical questions. Questions that elicit down-to-earth answers to the problems of daily life.

Many men enjoy visits to railroad museums, a look at old steam engines and certainly travel by train from time to time. Auto shows—both antique and futuristic—are popular.

Men enjoy the Wild West and rodeos, cattle shows and the like. I’ve operated tours to Western Canada highlighted by attendance at the annual summer Calgary Stampede and Chuck Wagon Races. Combining this show with scenic rail travel through the Rockies and a visit to Banff, Jasper and Lake Louise makes for a winning trip for both men and women.

Men are often not as interested in a Caribbean cruise as women are. But a trans-Panama Canal trip, including the Caribbean, with a full-day passage through the canal, is much more appealing to the men. They’re up at 5:00 a.m. and out on deck to see the ship being called into position to transit the various chambers as she makes her way through the Miraflores Locks between the Pacific and the Atlantic/Caribbean.

They love the technical aspects of the canal and the accompanying story broadcast on board—a story of politics behind the building of the canal, health hazards and deaths which occurred as the workers hacked their way through the malaria-infected jungles. Man against the elements is an age-old story men love!

Sabrina Lozier of Especially 4 U Tours and Travel sums it up well. “Tours that include ‘guy things’ make it more attractive to the men. When we do tours that include shopping, for instance, it’s helpful if we visit shops where there are tools or home hardware, such as Sears or Restoration Hardware.”

And while men enjoy a certain amount of comfort just like women, they particularly enjoy staying in lodges, rustic-style hotels and national parks—not quaint little Victorian bed and breakfast spots.

Male Trip Leaders

We might also think of having some men as trip leaders and local guides—men who can talk “man talk”—building codes, war statistics, sports figures, and so forth. Guides who know something about the era our travelers come from. It’s often difficult for young guides to relate to



World War II. In fact, to them the term “The War” may mean Desert Storm or perhaps Vietnam, but certainly not the 1940s.

So, once we’ve tailored our trips to be of interest to men, how do we get them to enroll? We may need to modify our usual marketing strategies and also attempt some brand new ones. Our flyers must look sufficiently straightforward—no flowery, romantic phrasing, no repeated use of words like gorgeous, beautiful and elegant, no pastel paper.

Encourage the women who often participate in your programs to invite men whom they think might enjoy a particular trip that has male-oriented activities. Consider approaching other organizations to suggest a joint trip. You might bump the tour cost up a few dollars to provide promotional monies to advertise in appropriate community publications.

All in all, there are many things we can all do to make our trips appealing to the male portion of humanity. Let’s rethink our programs, ask for input from men we know and present future itineraries that men and women alike can enjoy together.





CHAPTER FIVE

Promoting Your Trips

If there's one arena in which you'll be expected to succeed, it's in marketing and promoting your trips.

In some cases you may have planned the best trip in the world, but if you don't know how to market the trip properly, it's all for naught.

In other cases, you may have simply placed your organization's group on an existing tour or cruise, so you will not be expected to handle the operational aspects. But, you will be expected to promote the trip, sell it, and perhaps escort your group as well. Your supplier will not do it for you. He'll provide the product, but he won't provide the clients; that's your responsibility.

In this chapter I discuss some different promotional avenues such as direct mail, promotional parties, referrals, paid advertising, press releases, and newsletters (both by e-mail and by "snail mail"). Decide for yourself which of the many promotional possibilities will work for you.



Marketing Your Travel Program

Pesky telephone solicitors that call your home selling products you don't want. Direct mail offers you throw away without even opening. Coupons on the supermarket receipt to which you pay no attention. If such techniques are what you think you have to do to find travelers for your trips, you may question why you should market your travel program at all.

You need to be in touch with your present travelers to let them know about your trips and most importantly, you need to market to potential new travelers, including all those baby boomers who have come into the market. Even if your trips are going out fully booked, you still need to infuse new members into your program. A certain percentage of your members will drop from traveling with you each year. This may be due to health problems, changing interests, now traveling with new friends or moving away from your area.

If marketing your travel program is a goal, what avenues are available to you and which of these are most likely to bring the results desired and be within budget?

There are many avenues available to follow that will result in an effective "do it yourself" marketing program. These include paid advertising, press releases, direct mail, special pricing offers, raffles and giveaways, a bring-along-a-friend campaign, a website and a myriad of other ideas. Let's take a brief look at some of these.

Paid Advertising

A lot of paid advertising may be well beyond your budget, particularly when using major newspapers. But often, smaller local papers' ad rates are more within your possibilities. If you do decide to advertise, your ad should be professional looking, clearly state details about the trip and provide an e-mail address or a mail-back coupon for the reader to request further information. One ad won't do it, but usually when you place an ad a number of times in a row, it will get results. It is important to track the results of ads so you know how many inquiries the ad brought in and how many trip bookings actually materialized from among those inquiries. It also tells you if this type of marketing is effective in generating new travelers to your programs.

Press Releases

One of the best, but an undependable source for gaining publicity for your trips, is to send a press release to a newspaper. Best because it is free, undependable because you never know if the publication is going to use the information in the press release. Unlike a paid advertisement, publications don't have an obligation to print your press release. If you have never written a press release, it's time to learn to do so and to plan to send them with regularity to your local papers and radio stations that have travel sections and shows. When these contacts become familiar with you and your trips, your chances for coverage greatly increase.



Direct Mail

Although expensive, direct mail is effective. The contacts may include those already on your mailing list who have taken previous trips and prospects that have been referred to you as well as new names of people from the community that you have identified through research.

New contacts might include people who now fall within the age bracket of your travel groups, new residents of the community or a membership list from a service club. Another category of traveler might be those who are alone in life. They often are good group travel candidates as the group provides the social atmosphere and sense of belonging they may seek.

Your direct mail information should cover several trips, or perhaps an entire year's calendar of trips. With this you offer some choices for the potential traveler to consider, as well as helping you to keep the number of mailings you do to a minimum. Postage expense can also be controlled, especially if your organization qualifies for non-profit rates, but if not, you will want to use bulk rates or other special postal rates.

Special Pricing

A good way to build membership is to offer at least one trip a year with some sort of special pricing. By "special," I mean something like two for one (one being a new traveler), bring along a friend for half price, or a deep discount on a cruise price. Of course the "friend" has to be somebody new to your trip program.

It should be something that the reader truly perceives as a great value—not a trip you've marked up steeply to cover the second person's free or discounted trip. Travelers are savvy nowadays and quickly see through such schemes.

Raffles and Giveaways

Nothing is as appealing as a free trip. Some of your inexpensive one- and two-day trips would make an attractive giveaway or raffle prize. (Be sure to check your state's regulations about operating raffles and giveaways.) If you don't have a suitable trip, contact a tour operator you book trips with and they may be able to help you with a prize.

Referrals

Increase your list of contacts through referrals from your past travelers. There is no better endorsement for your trips than a recommendation by a past traveler.

At the end of each trip, participants should be asked to fill out a trip critique form that includes asking them to give you new contact names I usually say, "Please give us the names and addresses of three persons whom you think might like to hear about our travel programs."

To encourage referrals, give something little to the traveler who is giving you new contacts—a key chain, pen or other inexpensive giveaway. Another approach might be a small discount on a future trip for each referral who books with you. When you contact the people being referred, be sure to mention the name of the person who asked you to send them your trip information.



Think Proactive Marketing

There are many other marketing avenues you might explore and they are dependent on your community, budget and talents. These include speaking about your trips at a club meeting, posting trip information on a website, producing a periodic e-mail newsletter, or doing tie-ins or sponsorships at service organizations and community events. The name of the game is to make your travel program visible to a larger audience than just your current mailing list or membership roster. Grow your prospect list and grow your travel program.



Promoting Trips Through a Newsletter

One of the most effective ways to get publicity for your trips is to have articles in your organization's newsletter. If your organization has no newsletter, perhaps now is the time to help start one. Newsletter articles can effectively work hand-in-hand with direct mail and other promotions. Newsletters nowadays may be "hard copies" distributed by mail. However many organizations are doing e-mail newsletters these days.

Here are Some Hints for Maximum Results

Develop a rapport with your newsletter editor. Make sure he or she knows how important the travel program is to the organization and its members. Consider granting occasional complimentary trips to the editor. You might invite him/her to be a trip leader if you believe he/she would do well at this; or you might cost in an extra trip for the editor on a particular trip.

Plan an annual schedule of articles. Ask for a list of publication dates. What are the deadline dates by when you need to submit your articles? Decide which tours you will promote in which issues. You'll want to promote major trips six to nine months in advance; shorter trips can be promoted closer to departure date. Don't forget, most tour operators and airlines are requiring tour finalization with participant names at least 60 days in advance, some even earlier. Obviously, late promotions don't help.

Think like an editor. Be sure you understand how much space the editor is allotting your story and write to fit. Your editor would probably appreciate having your work submitted electronically as an attachment or imbedded in an e-mail to save time and manual input.

Polish your writing skills. You'll want to be sure your grammar, spelling and syntax are top notch. Use a straight-forward and business-like style, but at the same time make your story exciting and welcoming. This is not an easy combination to achieve. Have a friend read your copy and make suggestions. Don't get hurt feelings if the editor changes, re-writes or corrects your writing. That's what editors do...edit!

Make it easy on the eyes. You'll want to be sure not to write too much, so the editor can run your story in a type size that's easy to read. Break up copy with short paragraphs and subheads.



Focus on tour highlights. You can't mention everything about a trip in your article. Highlights should be mouthwatering. On a recent trip to Austria, I promoted a night at the Vienna Opera, admission to a Vienna Boys Choir concert and dinner at the city's oldest restaurant, Griechenbeisl, where the likes of Beethoven, Wagner, Brahms and Strauss used to dine.

Write about future trips, not past ones. While those who went on a trip may love to see their picture in the paper, the purpose of the articles is to sell upcoming trips not report on past ones (maybe a bulletin board can be used to share photos of past trips). Or if your list is computer savvy, you might share trip photos via e-mail.

Submit photos or graphics if your newsletter uses them. Photos should be well-focused and reproduce well in color or black and white. Some cruise lines and tour operators can provide artwork for this purpose. You might also pose a couple of folks studying a map of an upcoming location.

Watch out for legalities. You can't just quote someone or use their photo without their permission. Nor can you "lift" lengthy segments out of a book or other copyrighted material without permission from the author. Tour operators and other travel suppliers are usually happy to provide descriptive copy about a trip or destination.

Remind readers to share trip information with others. If you welcome non-members on your trips, say so. Use your article to encourage members to bring along friends, family or colleagues. In fact, they might invite a grandchild or nephew or niece—why not suggest it in your article?

Time the article to also promote a promotional party, if you are planning one. List the RSVP phone number for the party. Placing stories in your organization's newsletter costs little, but gives you great opportunities for publicity. With care and effort, your organization's newsletter can serve you well.



Direct Mail Hints

The most successful marketing technique for many group leaders is direct mail—mailing to members of your organization, to a list of past travelers, or perhaps even to a "cold" list you've never solicited before. Unfortunately, direct mail can be one of the most expensive marketing techniques, even if you are using bulk mail rates. Therefore, if you promote your trips by direct mail, you'll need to maximize the results.

Here are a Few Hints

- ✓ Be sure your mailing list is current. Don't waste postage on people who have moved or are no longer able to travel.
- ✓ Mail your piece in your organization's envelope with its return address on the envelope. Even if a cruise line or tour operator offers to do a mailing for



you, insist that it go in your organization's envelope. Since your members recognize the sender, they are more likely to open it and pay attention to the message.

- ✓ Mail the announcement along with a welcome letter from your organization's president or from you. A brochure by itself in an envelope without a cover letter is cold and abrupt.
- ✓ If possible, have the letter and trip announcement or brochure in the envelope by themselves, not with a variety of other materials or announcements.
- ✓ Avoid having your announcement piece inserted in a newsletter, magazine, catalog or other booklet. You may save money by piggy backing your piece in this kind of mailing, but recipients often set this larger publication aside for later reading and may not see your announcement until weeks or months later.
- ✓ Be sure your mailing has a reservation form in it. This facilitates your readers being able simply to tear it out and mail it to you, even in the middle of the night.
- ✓ Consider ways to make the envelope look like a first-class letter or invitation—not junk mail. Many of us no longer open junk mail. Direct mail pros try such tricks as using a stamp instead of metered postage, using nicely textured envelopes and not using address labels. Instead, they send the names and addresses to a mail house electronically, which prints out directly on the envelope in a cursive font, thus avoiding a label look. This technique is a bit pricey.
- ✓ Consider using a professional mailing house. They'll see that your mailings get out on time, something you can't always control when using volunteer help. Mailing professionals can give you lots of good advice, too. Rates are fairly modest, and who knows, maybe they'd take a trade-out of a free or discounted trip with you in lieu of payment!
- ✓ Mail sufficiently early. For major international tours, that's as early as nine months in advance. For shorter trips closer to home, it need not be that early. Don't ever send out a mailing over a major holiday period. Most pros won't mail between Thanksgiving and New Year's.
- ✓ Realize that your tour is not going to fill from just one direct mail promotion. You'll be lucky to fill 50 percent of a departure from one mailing. Direct mail works best when coupled with other promotions such as a series of articles on the trip in your organization's newsletter, a promotional evening get-together, flyers posted on strategic bulletin boards and a follow-up mailing.

With these tips in mind, direct mail can be the most effective bullet in your promotional arsenal. Use it wisely.





Producing a Promotional Party

Planning a major trip? Don't forget to organize a promotional party. These events are a great way to obtain trip enrollments. Their purpose is to generate interest in a specific trip among your members and guests and to get people to sign up well in advance of your booking deadlines. This party is not to be confused with a pre-departure briefing, and is open to a wide group of members and guests.

Good pre-planning is the key to a successful party. I recommend giving this party about six months before a trip's departure. First, establish the date and location, making sure there's enough lead time to plan properly and get a good turnout. Do your members prefer daytime or evening programs? Be sure your date doesn't conflict with major activities or holidays. Also, first clear the date with the sponsoring tour company or cruise line, or a travel office who you will want to send a representative to the event to talk knowledgeably about the trip or area.

It's In the Details

Pre-plan just as you would for a party at your home. Have you thought of where to put their coats? Where to park? Name tags and raffle forms? Do you need a microphone and can you easily work the video monitor? I'm a mechanical klutz. I always practice in advance so I know what buttons to push. And, advance planning helps your event go smoothly.

Who should you invite? Start with those already enrolled in the tour. Their enthusiasm will lend excitement to the event. Ask each of them to bring a friend. Then open it up to your mailing list, announce it in your newsletters and on flyers. Use whatever outlets you have—bulletin boards and postcards are other possibilities. Make sure you personally invite anyone who has asked for information on this or another trip but who hasn't signed up.

Ask that people RSVP to your event, so you know how many people are likely to attend. Invite twice as many people as you need; you'll have last minute no-shows or cancellations.

Event Day

A promotional event should not exceed 60-90 minutes. Start setting the mood immediately. Bring CD's and DVD's to your event and have them playing as people arrive. Handicrafts, posters, artifacts and costumes can also add to the color of the event. I've even worn a Japanese kimono and woven artificial cherry blossoms up a staircase for "A Night in Japan." Get people seated, where they'll find a trip brochure and reservation form on each seat. Welcome them, briefly review the trip dates and destinations, then show a video or two of the area or regions to be visited. View them in advance to make sure they are up-to-date and appropriate to your audience. Videos and DVD's can be secured from state or country tourist offices, airlines, cruise lines and tour operators. Don't overlook non-travel industry sources such as libraries and video stores. This portion of your event should run no longer than 20-30 minutes.



Introduce your tour operator or supplier and let him or her stir up interest in the trip, helping you encourage people to sign up on the spot. Make a sales pitch, stating that you're accepting reservations that evening. Some trip planners offer a discount or small gift as an incentive to anyone who signs up during the event. If people don't have their checkbooks with them, suggest that they complete the reservation form and turn it in that evening; ask them to forward the deposit in a day or two. By writing out the form that night, they start feeling committed.

Why not appeal to the sense of taste, as well? Many easy finger foods suggest specific destinations—miniature Italian pizzas, Chinese egg rolls, stuffed grape leaves from the Mediterranean. I think “breaking bread” with your guests lends an aura of graciousness to your event. It's your option whether to provide beverages at the beginning, then again with foods after the presentation. However, food should never be the focus; the TRIP is the focus of the presentation.

Everybody Loves a Give-away

A raffle as the party's final event keeps folks there until the end. Music, videos, a nice picture book of the area to be visited or travel calendars are good prizes. Raffles encourage everyone to drop their name with address, telephone number and e-mail into a bowl, so it gives you a record of everyone who was present, even friends and guests of your regular travelers. You can follow up later with every attendee.

These tips should help you to create a successful party—not just an enjoyable event but one which generates trip enrollments and steers your trip towards sellout status.



It's Okay to Use Your Tour Members

I grew up being taught that it wasn't nice to use people. As a child I wasn't supposed to look forward to my uncle's visit because he brought me yummy caramel candies wrapped in pink and purple cellophane but rather because I loved my uncle for himself. As a teen, I wasn't supposed to accept a date to the prom with the least-favorite boy in my class and “use” him just to ensure I got to the prom.

But as an adult, I find that “using” my present and past tour members is not frowned upon. Surprisingly, many trip participants want to be used; in fact, many beg me to use them. So what are some of the ways we can tastefully use our travelers?

First of all, use them for referrals. On my tour registration form I ask for two referrals. It says: “Please send information on this trip to my friends” with blank spaces to fill in the name and contacts of the friends. I then write a personal letter to the friend, tell them who referred them and enclose a pertinent trip brochure. Similarly, at the end of the tour when I mail out forms to the participants to give their comments on the tour, I again ask for referrals.



Another way I may use tour members is to ask for their help en route. I might ask one person to bring up the rear and be sure everyone got through the immigration line while I scurry ahead to the baggage carousel to tend to the luggage.

I might ask a tour participant to lead songs on a long bus ride. I've often requested that one of our younger or more active members fall back and accompany one of the participants who walks slowly and may be having difficulty keeping up. I might also ask someone to leave her little clique of friends and start up a new table for dinner, thus helping me activate sociability on tour and ensure that no one ever feels left out.

Leadership Duties

I also like to ask them to accept "mini" leadership stints. For example, one evening when dinner is not included, I might set up three Dutch- Treat groups at three different restaurants and ask three different trip participants to be the leader for one of the groups.

Sometimes you may have a tour participant who wants to run things, someone who is perhaps trying to take the leadership reins away from you. I find the best way to handle this kind of person is to use him/her! I might say, "Mary, later this afternoon I'm going over to the restaurant where we're having our farewell dinner; I want to check it out in advance. Do you want to accompany me? Two opinions are better than one."

You might even want to assign certain participants a specific role throughout the trip. For example, one person could be asked to be the official photographer to be sure everyone in the group gets photographed, and then to put together a little tour album of photos for each person as a memento.

If your travel program has a website, why not "use" tour participants by inviting them to submit short (and positive) comments for you to use on this site.

Lastly, you might want to use someone to arrange a tour reunion some time after your return home. Often this sounds like a grand idea when you're on tour, but unless you have someone appointed to be in charge of planning, you find it will never happen. Now, while on tour, is the time to appoint this person.

As you can see, there are many appropriate times to use people toward making each tour the most successful trip yet. Don't overlook this wonderful opportunity.





CHAPTER SIX

In-House Operational Hints

If you are producing some of your own trips, this chapter will guide you on the more mundane, in-office things you'll need to think about.

I've touched on everything from organizational skills to working with volunteers to trip costing and pricing. Also included are hints to pass on to your travelers (packing and staying healthy while traveling). Thoughts on the value of working with travel agents and city convention and visitors' bureaus. Even some ideas on reservation forms and hints on comparing and evaluating different tours side by side.



Organizational Skills Make for a Smooth Travel Program

Today's want-ads ask for individuals who have the ability to do "multi-tasking." We used to call the same talent organizational skills. Whatever you choose to call it, it's a must for operating a successful travel program: the ability to juggle a thousand different facets of the program and have everything come out on time. Here are some hints to help you bring calm and order to your program through organizational planning and maximum use of your best friend, the calendar.

Planning Trips In Advance

Set up your year's tour calendar a year in advance rather than just planning each tour as you go along. That way you'll have a good overview of the year's total program at the outset and be sure it's a balanced program. You'll check that you have some long tours, some short, some at the budget level, some which are more expensive. You can also plan for some domestic destinations, a few international ones, some land trips and perhaps one or more cruises. You'll also see where you have "holes" in the schedule.

Cross reference all important dates for each tour on a master calendar by date (not by tour) after you've set up the above calendar of trips by the date they operate, so nothing slips through the cracks. For example, under the month of February you might list: Feb. 7 as the date to invoice your tour participants for final payment on your Europe spring tour that leaves April 21, so as to get payments in on time to meet your 60-day review date of Feb. 21. You might have listed Feb. 15 as the date to plan a promotional evening for your New York City fall theater tour, and Feb. 20 as the date to start writing an article for your April newsletter.

This master calendar is also the place to surely list all dates on which you must make payments to airlines, charter coach companies, tour operators, or other suppliers. I list on this calendar any dates by which I must cancel space I am holding or lose the space. And most importantly, if I have placed deposits with certain suppliers to hold space, I list the date by which I must cancel to avoid penalty charges or lose the deposit to the supplier totally.

Cut off the Phones

Cut off answering phones early on Fridays - leave an hour to regroup and make up your "To Do" list for next week, ready for you to attack Monday morning. I'm a great list-maker. I have a total "to do" list, then from that I have a priority "weekly list" and from that I make up a "daily list" for each day as I go along. For some reason, it gives me great pleasure to cross off all the things I've done! I also find that having the list in front of me focuses me. And, if I'm lucky and suddenly get unexpected help from someone, I can see at a glance what projects are waiting to be done.

Plan each day by priority. If you need answers to certain issues by the day's end, do your follow-up e-mails or telephone calls first thing in the morning so you can get your answers in time. Plan



for differences in time zones; if you're on the West Coast, place your calls to the East Coast when you first come into the office.

Set Office Hours

If you're a one-man/woman operation, post the hours you're available on the door and in your literature. That way, you can set aside some time for planning, concentration, and quiet work—uninterrupted by those who just drop in to chat. If that doesn't work, take a project that requires concentration somewhere else to work on; I go to my local library.

Look ahead to very busy times and plan for extra help accordingly—be it perhaps temporary part-time help or volunteers. For example, I can see right now that I have four major trips departing in September. Therefore, I'm already planning for August to be a busy time preparing departure materials, finalizing air tickets and tour rosters, briefing tour escorts and so forth. I have already notified helpers not to plan on being out of the office much in August.

Learn to say “no”—particularly to squeezing one more trip into your schedule when you know in your heart it's too late to promote it properly, too much work for you to take on in addition to your present work load, or just plain bad judgment. Sometimes it's hard to turn down a past traveler's enthusiastic idea for a new trip or say “no” to a cruise line or tour operator's last minute “great deal.” In fact, sometimes accepting a last-minute offer from a supplier for such a great deal may scuttle one of your already-planned tours by running competition with yourself.

Think 24 Hours Ahead

When out on tour, learn to think 24 hours ahead. When sitting on the motorcoach, I'm thinking to myself that I'll make announcements to everyone when we get back to the hotel, while we're still on the coach and I have access to the microphone. I must collect the air tickets from the safety deposit box where I've stored them, double-check with my driver and guide regarding morning pick up time, and be sure I have with me the name and phone number of the operator meeting us at the next airport.

In this way, by thinking 24 hours ahead, you can solve any of tomorrow's problems today while there's still time to do so, and tour members usually never have a clue that something was perhaps amiss. To them it seems as though everything is rolling along perfectly smooth. Join me in planning ahead and learning to use organizational skills to our best advantage.





Trip Reservation Forms That Work

All trips that you operate should have a reservation form that participants complete at the time of trip enrollment.

Requiring such a form for each individual (or family) serves several purposes. First, it gives you all the information you need to process that individual's trip without your having to call to clarify things.

Second, it provides legal protection; members sign and date the form, verifying that they have read the trip material and are in agreement.

Third, it serves a psychological purpose in that it gives the individual a method to commit to the trip formally. Let's look at these reasons a bit more carefully.

Start with the Basics

The reservation form should start with the basics: full legal name, exactly as it appears on an individual's ID (or in the case of an international tour, as it appears on the passport). Nowadays, for security reasons, travelers are required to show ID upon checking in for flights or at hotels and the name you show on the tour roster should exactly match the individual's name on his/her legal documents.

Then you'll want the home mailing address. If it's a post office box, I also insist on having the street address in the event you would have to send something by overnight delivery service, since these companies cannot deliver to a post office box.

You'll need the home telephone number with area code. I also ask for fax and e-mail addresses if they have them. More and more folks, including seniors have e-mail, and an e-mail list is a painless and no-cost way to get messages of last-minute tour offerings to folks.

In case you're offering a family vacation wherein the adult may be inviting grandchildren or other young people to join the trip, you'll want to know the children's ages. And, in the case of international tours, I also ask if the person is a U.S. citizen or not, since exit/entry rules can vary for citizens of various countries.

Rooming Choices

There should be a place where the enrollee can indicate a choice of room accommodations: double bedroom with a spouse, sharing a twin-bedded room with a specified friend or another club member, or a single room at supplemental cost.

If this is a cruise with choice of cabin category and price, be sure that space is provided for the client to indicate both first choice of cabin category and corresponding price and also second choice in case you cannot confirm first choice.



If you are offering choices or selling optional pre- or post-trip arrangements, there should be a place on the form to check his/her wishes. For example, once I was selling a Scotland tour with the option of stopping in London for three days on the way home. It was important to me to know whether a tour member planned to use the group flight homeward from Glasgow at the end of the basic tour, or whether I needed to put that individual on the homeward flight from London three days later.

Ask for Referrals

I also find it a good marketing technique to ask the client to list names and addresses of any friends who might be interested in the tour or in being placed on the mailing list to receive information on this and future trips. You want to constantly “grow” your mailing list and this is a good way to do it.

Ensure it's Signed

Reserve a place for the client's signature at the bottom with a statement like this: “This is to certify that I have read the trip brochure (or flyer or descriptive material) and responsibility clause and agree to the conditions therein,” followed by a line for signature and date.

Also indicate the deposit amount and to whom it should be made payable as well as the address where it is to be mailed. Even though this information may appear elsewhere in your tour material, it's helpful to reiterate it right on the reservation form itself. If you are accepting payment by credit card, you'll need to ask for this information including card number, expiration date, exact name as listed on the card, and 3-digit code number.

Do you want to ask other questions? Questions about medical conditions, diets, emergency contacts and the like? I prefer NOT to ask these questions on the reservation form, but instead to ask them on a subsequent “Tour Member Questionnaire” that I send to trip participants after they have enrolled. You may also wish to request passport data and birth date information.

Ultimately you do need this important information on each tour participant for your files and to give to the tour leader. But asking for it before the client has enrolled often impedes or delays the enrollment process. Remember the purpose of the reservation form—it's to get people to sign up for your tour! You don't want to throw up roadblocks to that goal.

Offering an Option

Now, what do you do with people who say “Put me down. I'm planning on going with you.” Or “Hold a place for me.” My answer always is to do what we call offering the client an option. It goes like this. “I'll be happy to reserve two spots for you, Mary. I can hold space for you until we close at 5 p.m. on Friday, Nov. 17. I'll need the reservation form and your deposit by then to reconfirm, so be sure you get it in to me on time.” A reservation without a deposit is not really a reservation at all.

How much deposit should you indicate on the reservation form? That will depend on the requirements of the tour company or cruise line you're using. In the event it's your own trip which you have booked yourself directly, then the amount is up to you. If it's a one-day or weekend trip, I would simply require full payment at time of enrollment to avoid invoicing for later final payment. On the other hand, if it's a longer, more expensive trip, then you might



request anywhere from \$100 to \$300 deposit, with final payment due no later than 60 days before departure (some cruise lines and tour operators may require it even earlier; check with them).

Lastly, be sure you've put the name and date of the trip on the top of the reservation form so you register the person for the right trip! Go for it. Get out there and get those enrollments.



Knowing How to Use a Travel Agent, and How to Pick a Good One

Occasionally planners ask, "Should I use a travel agent to book my group's trips?" The answer? "It depends."

It depends on the choice of agencies to which you have access. It depends on the level of staff expertise of a particular agency, on the personal rapport that can be developed with the agency's personnel, and on the amount of time and expertise you bring to your position versus the amount of help you may need from others.

To Agent or Not?

If you have been a planner for many years, have traveled extensively and have a fairly high level of travel industry expertise, your need for a good travel agent is not as urgent as it could be otherwise. You might wish to use an agency strictly for airline ticket purchases, for very difficult or complex trips or when you wish to travel with a wholesaler who will not work with you directly but only through a travel agency.

If you see yourself not as a "pro" but rather as the designated buyer on behalf of your group, you might welcome the tremendous service that an excellent travel agency can offer.

Characteristics of a Good Agent

The first thing an agency can offer is *expertise*—not only expertise in a certain area of the world, but also knowledge of the marketplace and the many suppliers and their products. Most good agents know the product line of a number of tour companies, cruise lines, hotels, and so forth. Whereas you, if left to your own devices, may select a trip based on price or an attractive itinerary, they will most likely select a trip based also upon a company's reputation and reliability.

A good agency, with experience in group handling, should be an experienced *negotiator*—securing "goodies" for your group that you might not know are available. With a cruise line these might include group discounts, extra free cabins for a certain number of bookings or an amenity package of such things as brochures, wine, a complimentary shore excursion or prepaid shipboard tips.



With a tour operator, the experienced agent would know how to negotiate up front deposit dates, more flexibility of the tour operator's rules, etc. In short, an agent experienced in group handling knows how to defend you in negotiations with the supplier who has much more experience in negotiating than you do.

R-E-S-P-E-C-T

A good agent also sometimes gets *more respect* from a supplier than you may if you are not familiar with industry policies and jargon. I was recently negotiating a dinner contract with the banquet manager of a well-known restaurant here in town. He suddenly said to me, "What a pleasure to deal with a 'pro.' You have no idea the time and headaches it saves me." I was bringing up attendance guarantees, no-host bar procedures and expected payment methods.

A good agent also takes the *work load* off your shoulders, freeing you to fulfill your role of promoter rather than your being consumed by paperwork. The agent would handle rooming lists and group flight manifests for you. They would handle invoicing of participants and other financial matters for you. They would speak with your travelers who call with questions. They would check for accuracy of all correspondence and contracts that come in from your supplier.

Your agent would be able to handle those of your tour members who may have deviations from the main trip and need help in securing independent flights and hotel accommodations. This is something in which you don't want to get involved and something which most tour operators and cruise lines are not prepared to do.

A good travel agent would keep you apprised of deadline dates to which you and your travelers must adhere. The agent would have good organizational skills and keep one step ahead of you to be sure everything gets done on time.

A good agent would also be creative and generate ideas for you—for example, alerting you to off-season dates, to specials which may come into the market or to new exciting offerings some tour operators may be originating. They would be working with you on a long-term calendar of trips, not just piecemeal on a trip here and there.

Your agent always brings you an extra level of safety by complying with state legal requirements (for example, the California Seller of Travel law with its restitution fund and prohibition against mingling of funds). Your agent should offer your travelers optional travel insurance with default coverage to protect should by any slim chance the supplier you have selected default financially (of course, if you're working with a tour operator that belongs to USTOA or similar, you may have some protection).

Selecting an Agent

So, if you decide you do wish to work with an agency, how do you select one? There are many different kinds of agencies and levels of expertise available. It's best to interview several agencies to see which is best able to meet your needs.

You'll want one that specializes in leisure/vacation travel (not corporate business travel) or at least has a leisure department. Ask "Are you accustomed to group handling?" or "Do you have a group department?" Many excellent retail agents have had virtually no experience handling group business and it does require specific knowledge and skills. Second, "Are you ARC-



appointed?" This means that they have been authorized by the Airlines Reporting Corporation to issue air tickets in-house rather than having to buy them from a third party.

You'll want to assure yourself that the agency has a history of stability, professionalism and standing in the community. You might ask if they are members of the American Society of Travel Agents (ASTA), the Association of Retail Travel Agents (ARTA), or the Cruise Lines International Association (CLIA). Also, you might like to query if the agency has a Certified Travel Counselor (CTC) on staff.

There are good agencies that have none of these credentials, so a lack of credentials does not necessarily imply that the agency is not good. But in this day and age of professionalism, most agencies want the public to know of their industry affiliations and their agents' achievements as a sign of the agency's professional commitment.

Decide your needs. Do your homework.



Convention and Visitors Bureaus...Your Best Friend

Have you used the services of a convention and visitors bureau lately? If not, you are overlooking one of the most helpful resources available to you. And available to you free of charge.

City convention and visitors bureaus, or CVBs as they are commonly known, exist in most cities. Sometimes they are referred to as Convention and Visitors Authorities (CVAs). Whatever they may be called, their purpose is uniformly focused on bringing folks into their communities. They want visitors to stay in their hotels, eat in their restaurants, shop their boutiques, and patronize their cultural/civic activities. CVBs may be as large as the San Francisco CVB with over 60 employees, or they may be tiny, like my nearby Berkeley CVB with only three employees. It all depends on the size of the city.

Why Are Their Services Free?

CVBs do not need to charge you for their services, because they are funded by their city. Most CVBs receive their funding through the city's general fund and what is called the "bed tax," a tax charged on all hotel/motel stays in the city. In my town, for example, that tax is currently 12%. Some of the large CVBs also have paid memberships, wherein for an annual fee, various suppliers in town become members. The CVB often sponsors monthly functions where members learn of new venues in town and network heavily among their peers. Destination management companies like to be kept aware of new developments in town: hotel openings, changes in airport pickup and drop-off rules, new industry taxation regulations, and new competitors on the horizon. They use the CVB and its functions as a major source of information and for referral business from other attending CVB members.



Get Their Kit

So how can you best use the services of a city's CVB? The first step is to contact the CVB of the cities in which you are interested and ask them to send you a kit of collateral material. This kit will most likely include brochures of lodging choices, restaurants, cultural activities, festivals, and so forth. You will also want to browse their websites.

After you review their material, you can then consult with their staff on more specifics. For example, while a CVB will not recommend or negotiate a particular hotel for your group, (they must be neutral), they can tell you which hotels are central or out-of-town, which have in house private dining or meeting rooms, etc. The CVB can warn you of dates when the city may be sold out due to sporting activities or big conventions in town. Feel free to ask them for names of reputable destination management companies or tour operators, coach charter services, or local step-on guides.

Obviously, CVBs are interested in getting as big a piece of the pie as possible for their city. They're going to be much more interested in your group if you are staying in their hotels than if you are staying elsewhere and just coming in to visit for a meal or an afternoon of shopping. And they'll love you if you're doing single destination trips, staying a week in their city with day trips out and back, rather than just a one or two-night stopover.

What Information Will You Receive From A CVB?

Obviously, the brochures, pamphlets and flyers you receive will depend on what the city has to offer. Typically they may send you a city map, a list of art galleries and museums (along with their locations and hours), a listing of annual fairs and festivals, information on accommodations, restaurants, and cafes, and perhaps information on offerings unique to the particular city.

For example, Berkeley lists its breweries, a sake plant, and chocolate factory along with mention of its "Gourmet Ghetto" shops surrounding Alice Waters' world-famous restaurant, Chez Panisse—all of which an innovative travel planner could turn into an interesting day tour of culinary activities.

Many city CVBs list activities related to the cultural scene. Again, for example, Berkeley publishes a brochure entitled "Arts and Culture Scene" covering the visual arts, literary arts, film and video, and the performing arts of dance, music and theater. It also publishes a listing of annual fairs and festivals ranging from free summer noontime jazz concerts to its February crab festival and an unusual Himalayan Fair. Another helpful brochure shows local parks and picnic areas and how to find them—a lifesaver when you and your group are looking for a pleasant spot to stop for a box lunch picnic.

Group Business—Their Prime Concern

CVBs are helpful to individuals who simply appear on their doorstep asking for a day's suggestions. They also help individuals who call to say they're planning to come for a wedding or graduation or business meeting and asking for suggestions. However, their primary interest is in bringing group business into their city.

This could be tour groups like yours. It could be sports meets, corporate meetings, or conventions for professional organizations. CVBs are accustomed to working with trip designers, destination



management companies, meeting planners, and other travel professionals to show off their particular city's best features and activities.

Many of the larger CVBs have a team that travels and makes proposals to organizations around the country, often years in advance. They hope to woo the organization to their city for a site inspection and ultimately for a selection of their city as the convention or meeting site. Many also sponsor invitational familiarization trips for legitimate travel writers, hoping to receive mention in travel magazines, newspapers, websites and other online publications.

So, start planning your trip at least a year in advance, doing your research, asking questions, and planning the trip of a lifetime. Use the CVBs. Not only can they give you specifics about their city, but you'll also find that reviewing their material may give you inspiration—ideas for new trips with new themes to new places—ideas that perhaps you might never have thought of before. Make CVBs your best friend. They are waiting for you.



Handling Cancellations, Refunds, Waiting Lists and Late Bookings

While tour planning, marketing and escorting are often the “fun” part of running a travel program, one must also deal with some of the less glamorous aspects like cancellations, waiting lists, and late bookings.

Cancellations

You should assume you're going to have cancellations on each trip. Plan for it and don't be disappointed when they occur. I have found through the years that I average a seventeen to twenty percent cancellation ratio on my trips. The secret to handling cancellations is to be very clear in your written promotional material as to cancellation deadline dates and amounts the traveler will lose. Obviously, you're going to charge a larger cancellation penalty for cancellations close in to departure (within the last 30 or 60 days) than you would for those received earlier. Insist that the party canceling send it to you in writing—by letter, fax, or e-mail. Do not accept verbal cancellations either by telephone or in person.

Prior to publishing your tour offering, you'll need to review your contracts with your suppliers to see when you are at risk for a cancellation charge, so as to know what penalties to assess to cover your risk. You'll also want to be sure to offer all trip participants the option of purchasing cancellation insurance. And for those who choose not to purchase it, many travel attorneys advise that you make travelers sign a statement that they've been offered such insurance and have opted not to purchase it.

Refunds

Once you have received a cancellation, acknowledge receipt and process whatever refund is due the traveler quickly. Of course, if you have already forwarded their monies to a supplier (or the



client's credit card payment), you will need to formally notify the supplier and ask them either to refund you or to issue a credit against the client's credit card. It's best to drop a line to the client, telling him/her what you've done and how long you anticipate it may take. Then flag your calendar so you may follow up if you do not receive the refund in a timely fashion. I always like to put everything in writing so there are absolutely no misunderstandings.

Waiting Lists

And what if your trip is booked to capacity and you're still getting inquiries and bookings from folks you can't accommodate? Tell such hopefuls that you are forming a priority waiting list and what their position on the list is, based on the day you receive their application and deposit. Do not accept waiting list trip applicants without a deposit. I then like to process their booking just as I would a confirmed booking. I send them all information bulletins and other materials that I send confirmed participants, so that they may begin preparing for the trip—clothes, passports, etc. Although I acknowledge receipt of their application and deposit, I tell them their waiting list priority number and I say that when (not if) space clears, we'll notify them. I also reassure them that if we are unable to clear space for them, they may ask to drop off the waiting list at any time and full refund of their deposit will be forthcoming immediately.

Usually, if cancellations occur early in the game, there's a much better chance of space opening up for standbys. However, once clients have made their final payments, cancellations may be few—usually by those with last minute health problems or family emergencies. So it's important to monitor final payments and follow-up any late ones quickly, since often clients' failure to make final payment on time can signal that perhaps something is wrong. If the waiting list becomes sizeable, many consider running a second section of the tour or perhaps caravanning a second motorcoach. Remember, one coach fully booked is financially successful; two coaches half or two-thirds full is usually not. You can actually lose more money with more bookings!

Late Bookings

More and more people are waiting 'til the very last minute to decide on a trip. In some cases you may still have space available and may welcome such last-minute bookings. In other cases, your trip may be full and you really can't confirm them. One way to ward off last-minute bookings is to beat the clients to it. That is, just before your deadline for releasing unused space, you might send out a letter or e-mail to previous inquiries telling them you are closing the tour shortly and it's "now or never." With a bit of skillful advance planning, careful calendar watching, and constant marketing, you should be able to handle these issues with success. And, last of all, don't forget to keep the names of those who cancelled, so as to offer them "first crack" at next year's trip.





Evaluating Tours for Value

Of the many jobs you do as travel planner for your group, perhaps none is so complex as that of evaluating tour offerings from wholesalers and tour operators. Many times we are intrigued by certain tours—perhaps because the itinerary sounds so mouth-watering, or because the price is almost too good to be true or because the sales presentation and offer is too fabulous for us to say “no.” On the other hand, we may see a similar tour at a different price and wonder about the price differential between the two tours.

This is when it’s important for you to sit down and evaluate trips side by side, to learn which is truly the “better buy” for your group. Elements which make a tour more or less expensive than that of a competitor may not be as obvious as deluxe versus first class hotels, or inclusion of more meals. There are many considerations.

Full or basic?

Some companies like to offer basic tour packages with transportation, accommodations and a city tour in each destination. Then there are options which participants can elect to purchase along the route. Many travelers like having this freedom of choice. Others don’t like to pay additional money en route. They prefer a more expensive, inclusive trip, paid for up front.

Time of year

Air fares to Europe in winter can be half of summer fares. New Orleans travel arrangements increase dramatically around Mardi Gras. Las Vegas rates and availability are better midweek. Retired travelers are often able and willing to travel nearly any time of year, or day of the week, and can take advantage of off-peak travel rates.

Group size

A tour designed and costed for a small group will be more expensive than one for a large group. Fixed costs—private motorcoach, professional tour manager salary and overhead—are pro-rated, so divided among only 20 travelers means a higher per person tour cost than when divided among 40.

Meals

A tour with no meals, or very few meals, will cost less. Continental breakfast of coffee and a roll is half the rate of a full American breakfast or buffet. When travelers select from an à la carte menu, costs are higher, but on fixed menus, guests have little or no choice of food items and may be required to eat at a specific time. Theme and event meals, which combine food with entertainment increase the cost of the meal but add value to the tour experience.

Hotel accommodations

In addition to the cost differentials between categories of hotels and their locations (suburbs, close to restaurants, downtown, resort area), there are other price factors. Will rooms have a



view, or face the parking lot? Will they be in the main hotel, or an annex? You need to be assured that all hotels on the itinerary are more or less the same class of hotel and that all your travelers will have equal rooms. Sometimes a stay at a world renowned hotel is added as a feature of the tour, for instance at National Parks or in places such as Victoria, B.C. at the Empress Hotel, where the upgrade exception is well worth the added price.

Tour leadership

Particularly on international tours, you will have the services of a professional tour manager throughout the tour. They often speak several languages and know the culture and history of the destinations, thus significantly adding to the trip. Many domestic tour operators also provide these managers on their tours, and build in that cost, allowing your group leader to be more of a “host” on tour and not be bogged down with the details. Some repeat groups ask for a specific tour manager when they book a tour.

Evening activities and social events

Look for features such as theatre, ballet, folklore performances, hosted receptions or cocktail parties, music or special dinners at “name” restaurants. Today’s travelers often seek more unique activities and entertainment, so this can be an important aspect of the tour, even though it adds more cost.

Entrance fees, admissions and local guides

Watch for the terms “visit” versus “view” or “see”. Will your group be taken to a museum and told to reconvene in two hours, or be given paid tickets and have a guided tour through the museum? Reserved times and guides at museums increase the group’s enjoyment and avoid waits.

Number of complimentary trips

Tours which grant your organization two complimentary trips—perhaps one for the escort and another for a spouse or assistant—are going to cost more than a tour which allows only one free space. All such complimentary trips are costed into the tour price. Off-season, suppliers may give tour operators more generous terms. You are more likely to get two free trips to London in January than July, or for the Mexican Riviera in October, not January.

Don’t Select on Price

When choosing a tour operator, don’t make your selection based only on price. Tour operator reputation, standards of service and professional affiliations are also important. Do they have consumer protection plans or bonds? If you have used a tour operator successfully in the past, you may not want to take a chance on a “new” operator. I tend to use certain key operators over and over through the years, thus gaining preferred treatment, a knowledge of that operator’s particular strengths (and weaknesses) and mutual respect. The value of any tour is a combination of services and products, as well as the reliability of the operator.





Costing and Pricing a Tour the Professional Way

Many times we buy a tour for our organization and its members at a price that is already set. This happens when we buy an existing, published trip from a tour operator.

The best we can hope for is to be able to negotiate special “goodies” for our participants—perhaps an extra party or promotional assistance. But often we need more than that. Maybe our organization needs to make a profit on the trip. Or maybe we at least need to cover our promotional costs and salaries of those administering the travel program for our members. How do we then arrive at a trip price that’s fair to everyone?

One scenario is putting together our own trip—booking all the arrangements ourselves. Another scenario is asking a tour operator to custom design a tour—a tour that is not in the catalog—so that prices cannot be compared one with the other.

In the first scenario, when we put the trip together ourselves, we must itemize each cost, add them up to calculate the net cost to our organization, and then add a markup to cover these expenses as well as to give us some profit. We thus arrive at our sale price.

In the second scenario, we can ask the tour operator to quote us a net cost for the entire package and we can then add our markup to cover our expenses and profit as in the first scenario.

How Many Tour Participants Do We Price On?

How do we know how many people are going to join the tour and whether we should assume we’ll have 20 or 30 or 40 participants? We don’t know. But what we DO know is that we’ll have to make some assumptions and cost the trip on the minimum number of participants we think will join—not on the maximum.

Book for the Maximum, Price for the Minimum

My motto is usually to book advance reservations for the maximum number we think will join the tour, but price it on the minimum. So, for example, for one motorcoach we might book space for 40, but price the tour on 20. In that way we can operate the tour without losing money if we only get 20 sign-ups. And if we get more than 20, we make additional profit.

Let’s look at some of the costs that might be factored into a tour. They could include hotel costs, meals, sightseeing tours, entrance fees, taxes, tips, or baggage handling. These are all what we call variable costs. They are costs that relate to each tour participant.

A second category of costs are fixed costs—costs that relate to the tour project as a whole; they do not change when we have more or less tour participants. Examples would be promotional expenses, the cost of sending a tour leader, or the cost of chartering a motorcoach. We pay exactly the same fee for that motorcoach whether we fill it with 20, 30, or 40 persons. A typical three night trip cost is listed in the box below.



Variable Costs	
Hotel at \$86 net per night/room x 3 nights = \$258 total per room	
Divided by 2 persons in the room = total hotel cost per person	\$129.00
Tax on above room, if at 7%	\$9.03
Breakfast, 3 mornings at \$8.50	\$25.50
Welcome cocktail party, estimate 2 drinks at \$5 per drink & tip	\$10.00
Two sightseeing tours--	
One half day city tour at \$35, One full day excursion at \$55	\$90.00
Baggage porter at \$1 in and \$1 out of the hotel	\$2.00
One theatre evening, tickets at group rate, per person	\$25.00
Total Variable Costs Per Person	\$454.03
Fixed Costs	
Motorcoach charter, 40 seats, at \$650 per day x 4 days	\$2,600.00
Promotional costs—flyers, paid ad in town newspaper	\$400.00
Tour escort's expenses, variable from above, if not complimentary by suppliers	\$454.03
Total Fixed Costs Per Tour Project	\$3,454.03
	Continued...
Putting It All Together	
Per Person variable expenses	\$454.03
Each person's share of the \$3,454.03 fixed expenses, if assuming 20 participants	\$172.70
Total Net Costs Per Tour Participant	\$626.73

We now know that if we have 20 people join the tour, it will cost us \$626.73 per person to operate this tour. The next question is how much are we going to mark up these net costs and what are we going to charge each person? Let's assume we wish to mark up the per person net price of \$626.73 by 15%, the add-on would be \$94 per person, and we arrive at a total sell price of \$720.73. We may round it up or down, arbitrarily deciding to sell it at \$720 or \$725, or even drop our profit and sell it at only \$699. (Note that a markup of 15% does not yield a 15% profit. The profit will be 13%. To make 15% you would divide the costs by .85, thus selling it at \$739).

No Law on Markups

There is no "law" that we have to mark it up 15%. If we feel \$699 is not a sellable price, we may have to rethink the mark up or adjust the content of the tour—perhaps drop to a less expensive hotel or other similar adjustment. On the other hand, if the itinerary is sufficiently distinctive, maybe we don't need to be competitive in price. Another way would be to price it on 25 expected participants rather than 20 if we really can sell 25. Note that if we were successful at selling 20 at a \$94 markup per person, our organization would earn \$1,880 on this trip. This would perhaps give us a little extra money to do something special for the participants, like pay for a reunion party.

The Secret Source of Revenue

The secret is that we would earn an extra \$172.70 per person on each additional traveler above 20 that joins the group, plus the \$94 markup. If 10 additional participants join, they add a total of \$2,667 extra to the organization. Why? Because the first 20 people who joined have already paid for the fixed expenses of \$3,454.03. Tour participants #21 through 30 pay us the same trip cost as



everyone else. However, we do not have to pay out their share of the fixed expenses (\$172.70) since the first 20 participants have already covered it. Pricing is indeed a slippery slope, but if one understands the basics behind it, one can adjust prices upward or downward to meet the financial needs of the organization.



Travel Health Hints

Health issues are one of the most important considerations when planning travel for our groups. We want trip participants to remain healthy on tour. But many times the combination of less rest, changes in diet, strenuous activities, jet lag, and perhaps a lingering cold passed from participant to participant can make it difficult. However, with a bit of advance planning, we can mitigate these effects.

Select the Right Trips for Your Group

The first step for good en route health is to select trips planned with your market in mind. If you cater primarily to seniors, be merciless in querying the prospective tour operator about such things as free time, proper pacing, long periods of standing, and amount of walking or steps in a given itinerary. Are enough restroom stops scheduled throughout the day's activities? Are there too many early morning starts? Trips that offer a basic program with options for those with more energy are a good choice.

Inform Travelers of the Tour's Activity Level

The next step is to advise readers in your trip literature what level of activity a particular trip entails. Some folks can handle a trip with lots of walking, climbing, uneven terrain, and steps. Others may be extremely limited in terms of mobility and endurance. You don't want participants (or the tour leader!) to find out after the trip is en route that they can't keep up, or worse yet, have them overtax themselves and end up getting sick or injured. I like the way adventure companies "tell it like it is" and publish statements like "Four to six hours per day of walking over moderately uneven terrain at sea level."

Think Health Issues En Route

Tour leaders need to be trained to think of ways that participants' health can be maintained along the way. Work with hotels or restaurants to provide healthy menus with low salt, more fresh fruit and vegetables, salads with dressing on the side, whole grain breads and the like. Selected menus should offer less fried foods, gravies, sticky Danish pastries, and overcooked items.

Schedules should allow for eight hours of sleep at night, time to take vitamins, and even perhaps to do a few stretches or mild exercises. Dehydration can be a problem; encourage folks to bring a water bottle so they drink enough water. If air travel is a part of your trip, remind participants to avoid caffeine, alcohol and carbonated drinks and to increase their fluid intake. They should also walk around the plane periodically. Notify them to carry any medications in their carry-on bag



for access on board and in case their checked suitcase should get lost. (Note: check TSA regulations).

Prepare In Advance For Good Health

For a major trip, participants should prepare for good health. They should be reminded to check all prescriptions for refills and not to depend on getting refills en route. Medications taken along should be in the original bottles and should carry not only the trade name, but also the generic name on the label in case an out-of-state or overseas doctor would need to know what medication one is taking.

They should take a second pair of glasses and/or a copy of the eyeglass prescription. It's also good preventative planning to see the dentist beforehand to forestall any sudden midnight cavity emergencies.

You'll also need to check with your tour operator as to any pre-trip inoculations required or recommended for a specific itinerary. In some cases you'll want to recommend that members consult with their personal physician or the health department. Detailed information is available at the Centers for Disease Control, www.cdc.gov.

If your itinerary includes higher altitudes, it's urgent that you specify the altitudes in your literature. Altitude sickness is caused by oxygen deprivation, and can cause intense headache, shortness of breath, inability to digest food, and other symptoms. Being in good health or excellent physical shape has nothing to do with it; some people are just more prone to it than others. It's particularly dangerous for anyone with cardiac problems, high blood pressure, asthma, or even serious respiratory problems.

Medical Insurance

Travelers should check their own medical insurance well before the trip and should be aware that Medicare does not pay overseas, although many medi-gap plans, HMOs, etc. do. One should consider purchasing optional supplemental travel insurance with such benefits as medical evacuation coverage and a hotline for assistance if needed in case of hospitalization or accident on the trip. Companies such as Travel Guard, CSA, Access America and others offer their policies through most travel agencies, or direct to the public.

Urge folks to read the fine print. Most policies do not cover pre-existing conditions unless one enrolls in this coverage by a specified date. It's also important to distinguish between coverage that requires them to pay for medical services at the time and then file for reimbursement later versus companies that come to their aid at the time. It's helpful if they carry a list of any allergies or medications to which they are allergic, as well as the telephone number of their physician in case consultation is needed during the trip.

Know Your Participants' Health Conditions

Many organizations and tour companies require trip participants to submit a tour questionnaire on which they indicate a family member to contact in case of emergency and to list any physical problems that might prove pertinent. And most tour companies reserve the right to refuse to carry participants with certain conditions, unless they bring a travel companion with him/her. While many tour participants are kind and wish to be helpful to those with illnesses or disabilities, others may voice frustration at having to spend their holiday playing nursemaid.



And you'll have your hands full leading the tour without having to deal with extreme cases requiring a great deal of personal attention.

Locating Medical Help

Most hotels have a "house doctor" — that is a local doctor who will come to the hotel room (for a sizeable fee). Overseas sources would be the nearest American Consulate or the International Association for Medical Assistance to Travelers (IAMAT), a Canadian foundation that publishes a world-wide listing of English-speaking physicians who have agreed to a schedule of fees. www.iamat@sentex.net.



Helping Your Members Pack for a Trip

Have you ever noticed how some of your trip participants come on tour with a small, compact suitcase and somehow are attractively and properly dressed for each occasion? On the other hand, there are those who bring larger suitcases with umpteen changes of outfits and yet are never quite together.

Take it from those of us who travel for a living—the difference is in knowing what to take for a particular kind of trip and, more importantly, knowing what to leave behind.

Know when to Hold 'em, Know when to Fold 'em

In your role of trip planner, do your travelers a favor by helping them learn to pack. Advise them in your pre-trip written materials what to expect in the way of weather, appropriate clothing for en route social events, and local customs which may affect their choice of wardrobe.

Most travelers want to be appropriately dressed. They appreciate being reminded of expected decorum in dress code when visiting religious sites. They like to know where and where not they may wear Bermuda shorts (beach resorts, yes; big cities, often not). They'll find it helpful if you suggest their wearing slip-on shoes when visiting Buddhist shrines so as not to have to untie and tie their shoes every time they turn around.

One does not pack the same for all trips. On a cruise, you unpack the minute you arrive in your cabin and stow your suitcase away until the last day when you repack for the homeward flight. The same concept is true of a single destination land trip, where you settle in to one hotel and then make daily side trips out and back. In these scenarios, you can pack anything, anywhere in the suitcase—just as long as it fits.

On the other hand, on a motorcoach tour when you're in a different hotel every few nights, unpacking and packing as you go, it's more important to pack in an organized fashion so that you can locate things in your suitcase. It helps to know that your scarves are always in the right hand corner and your dirty laundry is in a plastic bag on the bottom.



In my many years of travel, I have seen every packing scheme imaginable. I recall when we were taught to roll our clothes; I remember stuffing voluminous skirts into nylon stockings to hold their shape. Then we were told to pack everything flat, overlapping each layer. And so it goes. There is no perfect system, but I'll tell you what works for me.

Color Coordination

Stick to one basic color. For me, it's black. I have endless combinations of black and white separates—black wool pants, black and white print pants, and in summer, white pants. I have black sweaters and T-shirts and white ones. I have virtually nothing but black shoes and purses in my entire wardrobe, a long black evening dress, a short black theater/dinner dress and a couple of black and print skirts. A bright scarlet trench coat, a red tam and red gloves for cold weather, and a bunch of scarves in a variety of colors serve as accents to the black-and-white scheme.

Multiple Use

Many items can be for multiple use. A trench coat can substitute for a bathrobe if necessary; sandals for slippers. I take only two purses—one daytime shoulder bag with lots of zippered pockets and one small evening bag which doubles as a jewelry case.

Select fabrics that travel well. Wool and knits can be steamed out in the hotel bathroom. Synthetic fabrics also work well, but not in the tropics where they are too warm. Although at home cotton underwear is wonderful, on tour, fast drying nylon is more practical for a quick nightly washing. There are also many new fabrics that are wonderful for travel, some even with mosquito protection like DEET and now sunscreen also woven right into the fabric (consult an adventure company like REI, for example, for further information).

It's also important to select the right kind of luggage. It should be sturdy, but need not be expensive, as it takes a beating on a trip. I prefer a hard-sided bag to some of the newer light-weight canvas or tapestry bags. It should be made of a material which cannot easily be slashed with a razor.

Bags with Wheels

Having traveled in spots where porters cannot be found, I prefer a bag with wheels. Baggage handling is usually promised on escorted group tours, but, for example, in many European rail stations, there is no portage available.

It's also a good idea to have a carry-on with a one day's change of clothing in case the big bag goes astray for a day or two. Baggage tags with name and address should be attached to each bag, both outside and inside.

Think security. Valuables such as good jewelry, furs, family heirlooms, original business papers and irreplaceable photos should be left at home. Items of value that you must take with you, such as passport, travelers' checks and air tickets, should never be packed in a suitcase (or left in hotel room, for that matter), but should be carried on you or checked in a hotel safety deposit box.



Other Hints:

- ✓ Wear your bulkiest outfit instead of packing it.
- ✓ Don't forget the small things: address book, travel alarm, insect repellent; a couple of "good read" paperback books, a small flashlight, a camera and enough film to last the entire trip or a digital with extra batteries.
- ✓ Vitamins or medications.
- ✓ A luxury or two—maybe your favorite soap or cologne.
- ✓ A bathing suit. Many hotels have pools and I find a 30-minute swim loosens up those muscle knots that hours of riding on planes or motorcoaches can bring.
- ✓ Always, always bring a wrap, even in the tropics. Air conditioning can prove the worst menace to humankind and it's no fun to come home with bronchitis.

Bon Voyage. Happy packing—to you and your travelers.



Packing for Today's Reality

With many airlines charging for luggage nowadays, airport security inspections and nary a porter to be seen in most rail stations and many hotels, it's time we readjusted our clothing and packing advice for group tour members. Most of us who travel for a living have learned through trial and error what works and whittled down our luggage accordingly. Today I usually travel with a 14-by-20-by-8-inch "wheelie." But many of our tour members are arriving with way too much luggage and often with incorrect clothing. I'm reminded of a friend who told me of her niece arriving on a five-day hiking trip with five pairs of blue jeans and five tops; she planned on one set per day. Most of us, whether we're hikers or not, know that one doesn't need a different pair of jeans for every day of the trip.

Color Coordinating

For me, the learning curve began the year I graduated from college when my mother, sister and I embarked on an eight-month budget trip to Europe. Mom laid down the law – one suitcase each, no more. So my sister and I spent long hours trying on everything in each other's closet. Since she was taller than me, we soon discovered we each had to bring our own pants, but we could share tops: blouses, T-shirts and sweaters. To simplify further, we decided to take only those tops and bottoms that could be color-coordinated. Out of that strategy came my lifetime commitment to a black and white wardrobe, livened up with accents like a red trench coat or a silver sequined evening blouse.

However, after eight months of togetherness on the road, we were both sick of every item in our suitcases and on the last night, as we sailed into New York harbor aboard Holland America Line, we ceremoniously threw each item of clothing over the ship's railing into the murky waters below as we said a fond farewell to each top and bottom of our now tattered and smelly wardrobe.



Today the black and white system still works for me – not just for my travel wardrobe but for my entire wardrobe at home as well. For you and for each of your travelers, it may be khaki or navy blue or gray – we each have our favorite “backbone color” on which to base a travel wardrobe, but we need to teach our travelers the concept. Often the difficulty is not only teaching them what to take, but just as important, what to leave behind.

Give Some Guidance

Most travelers are fairly reasonable as long as they know in advance what to expect. They become irritable when they haul their travel iron and all its various plugs and converter along, only to find that they weren’t advised beforehand that their hotel provides ironing board and iron in each room. And while we as leaders can’t have a crystal ball, we can do some advance research as to what the weather may be, whether the theater night requires dressing up or if the captain’s welcome cocktail party on our cruise ship implies long dress or not.

I recall leading a group on a Galápagos cruise when one of my tour members mortified me by turning up at the captain’s farewell dinner with her hair in rollers! I sent her back to her cabin to pull her hair back in a chignon-ofsorts with a tropical flower stuck in it. Sometimes when we assume our travelers have common sense and know what to bring, they haven’t a clue and need our guidance.

So, use your best research skills, send them some online links that might be helpful, and insist that they stay within the luggage weight/dimension limits required. The trip will prove easier and happier for all.



Working with Volunteers

Do you use volunteers in your travel program, or are you considering it? Many travel programs depend heavily on volunteers for a myriad of services. These may include working in the travel office or acting as trip leaders.

Dorothy Eng heads up the North Oakland (CA) Senior Center’s travel program. “Volunteers are an important part of our travel program”, she says. “I have five on our committee. Usually I escort the trips myself and often I’ll take one of the other five along to assist.”

On the other hand, Ellyn Bloomfield, former Director of the Emeryville (CA) Senior Center does not use volunteers on her trips. “For legal reasons, I’m too afraid to use volunteers out in the field,” she admits. “If a tour member had a stroke and fell in her soup at the dinner table, I’d know how to handle it. I have a degree in gerontology and am accustomed to handling difficult situations. Volunteers may not have the know-how and could put the senior center in an untenable situation.”



Selecting Volunteers

What are some of the desirable qualities we look for in a volunteer? Not all who volunteer necessarily make good volunteers. Perhaps the most important quality is dependability. If a volunteer tells us that he/she will undertake a certain task, it's imperative that we can depend on that individual. Most directors agree that they are driven crazy by volunteers who fail to show up or complete a project to which they committed.

Another quality we look for is organizational skills—someone who can prioritize the segments of a job to be done and juggle the various duties and time commitments. If asked to submit a tour group's rooming list for the hotels 30 days before the tour departs, it isn't any help if one produces it 29 days before. By that time hotels may have cancelled your space.

Other desirable qualities would be someone with good common business sense, empathy for personal issues, a willingness to learn new things and the ability to follow instructions.

The volunteer who works in the office may need a different set of skills from the volunteer who escorts your trips. In-office volunteers need to have a gracious telephone demeanor to handle calls from prospective travelers, some typing/computer skills, and good, clear message-taking skills.

Volunteers whom you send out with your groups as trip leaders on the other hand, need the ability to speak in front of a group and skills to see that the day's activities all happen within the allotted times. They also need to interact smoothly with others—both the tour participants and the suppliers. Trip leaders need a high energy level, the ability to control the group without sounding like a dictator and most important, the ability to lead.

What Do You Owe Your Volunteers

If volunteers are willing to give their time, energy and dedication to your organization's travel program, what do you, in turn, owe them? Many travel program directors assume that the pay-off is a free trip for the volunteer. However, it's much more. You need to offer them initial orientation, ongoing training, supervision and follow-up, as well as a learning experience while working. You need to reward successful volunteerism with lots of thank you's and compliments on a job well done.

How about a certificate of appreciation they can show family and friends? Maybe a special thank-you luncheon? You'll want to rein in any outbursts of impatience and welcome suggestions if they find a better way to do something. Encourage them to excel. Above all, don't resent or be jealous of their efforts.

Motivations for Volunteering

Recognize their motivations for being there. While at the outset, motivations might be to "help out" and perhaps to travel, later on friendships and social interaction may be the prime motivations. Many volunteers in retirement have had very full professional careers with high levels of responsibility. Most of the time the specific help you will be requesting is more mundane—tasks that simply need to get done, not managed. In these instances, you'll need to be very specific, typing up your instructions, showing them a sample of what the finished job should look like, and giving them the completion deadline. Always give yourself a cushion to make corrections or modifications to the work turned in. I also like to follow up as I go along.



All in all, volunteerism can be rewarding to your program, to you, and to those who volunteer. Treat it with respect, loving care, and professionalism.



Tour Groups Too Small to Operate?

Perhaps you've had the experience of putting forth a trip that you think will be a winner, only to find that it isn't selling as well as expected. Departure time is drawing closer and closer and you're starting to panic. Should you operate it at a loss? Should you cancel? Should you invest more promotional monies into it? Should you lower the price and give away the company store just to get new enrollments? Let's look at the possibilities.

Plan for Possible Low Numbers

Don't ever assume that every trip you offer is going to succeed. At the time you plan and price the trip, make certain "fall back" plans are in place just in case it doesn't meet your expectations. Here are some of the things I do when I first plan the trip.

I price the trip on the lowest number of enrollees I think will join, not my maximum goal. If I'm hoping for 25 on the tour, I book space for 25, but price it on only 15. If I only get 15 to sign up, I can still operate the tour and perhaps make a small profit. However, if I'm successful and get 25, those ten additional bookings are "gravy" and my profit picture is well above expectations.

Second, I always cost in a small margin for error or unexpected costs. This could be for the tip I forgot, a drop in the dollar's value vis-à-vis a foreign currency, a sudden increase in some item in the tour, or to cover a misunderstanding. I always like to have a small padding there to protect myself.

Third, I remind myself to indicate in my trip brochure, flyers or other publicity material to publish the minimum number of participants on which the tour is priced.

And when considering promotional avenues at the outset, I consider the possibility of partnering with another organization of similar interests for maximum chances of success. Several years ago, I participated in a three-day tour to Ashland, Ore., to see the Shakespeare plays. The trip was jointly sponsored by one of the local senior centers here in northern California and the Berkeley Jewish Center. It made for a full motorcoach and the participants from both organizations got along famously.

This joint-sponsorship method is often called a "Host Club" arrangement; one organization, the "host club," plans and controls the trip but invites one or more similar clubs to join with them in promoting to their membership from the outset, not as a last-minute rescue operation.



Panic Time

It's almost 60 days before departure. Your enrollments are still not up to expectations. Where do you go from here? The first thing is to re-cost the entire trip. You may be surprised to find that perhaps you can operate it with just a tiny profit, or perhaps just at cost. When faced with a choice of operating at no profit or canceling, I usually choose to operate it, because you can use the on-tour time to provide a successful travel experience for those enrolled as well as building loyalty and promoting future trips. Also, promotional outlays already made will not show as red on your balance sheet.

However, if you are actually going to lose money by operating at small numbers, your alternatives are trying to renegotiate certain items on the tour or putting participants on another company's tour. Try locating a smaller coach, negotiating better hotel rates at other properties or arranging less expensive menus. Perhaps hire a leader who lives near the tour venue rather than paying to take an in-house leader from your organization. Be sure your publicity materials have not been so minutely specific that you've backed yourself into a corner trying to fulfill written promises to the traveler.

This all is possible if done sufficiently early and if you've kept careful track of your deposit risk dates so that changes you may make don't incur suppliers' penalties.

Lastly, don't forget that your present tour members can be your best sales force. Give them some sort of recognition (financial or otherwise) if they bring along friends or family as new enrollees. Often the solution is closer than you think.



Hints for Better Trips

People frequently ask me what are my secret hints for a successful trip. Here's my Baker's Dozen:

Start Your Plans Early Enough. Most major international (and some USA) trips need a one-year lead time. Short local trips may be planned closer in.

Consider a Survey. Don't assume your organization's leaders necessarily know where the rank-and-file membership would like to go or what will sell. Just because their top brass would love to go to China doesn't mean members want to go there or can afford it. Consider surveying the membership.

Look at Your Travel Program as a Spread across several years. If appealing to the same organization year after year, don't repeat trips to the same destination too close in. Plan on at least a three-year rotation.



Pick Your Suppliers with Great Care. Cheap is not necessarily best. You want value for what you're paying. If buying from a tour operator, be sure the tour product is compatible with your group, their insurance is adequate and they comply with all rules and regulations.

Consider Hub and Spoke-Type Itineraries where you settle in to one or two sites and then run day trips in and out. This way, hassles of multi-hotel check-ins and checkouts every day or two are avoided.

Schedule Activities Well. Plan daily sightseeing, social events and travel time so that you do not tire your participants. If you've planned a morning and evening activity, give them the afternoon free for shopping, rest or personal interests.

Include Something Personal, Non-Touristy. It could be a private get-together with locals, tickets to a hard-to-get play or special entree to an off-limits room at the museum. In short, include features that make your group feel special – things they couldn't do on their own.

Vary Trip Activities. Most trips designed for the general public do best with a broad-brush approach – a little of this, a little of that. Try to include some history, some art, some music, etc., rather than placing an over-emphasis on just one type of activity.

Get It All Confirmed in Writing. All of your tour components should be confirmed in writing with prices *before* you establish your trip price and announce it. There's nothing more embarrassing than having to change the name of the hotel, move the dates or increase the price after you've published.

Handle Monies Properly. You won't have access to clients' monies at the outset so verify what deposits you'll need to outlay for airlines, hotels, etc., and dates they're due. Arrange for a line of credit if deposits are hefty.

Be Super Organized. Keep a master calendar of important dates: deposits to suppliers, final rooming lists, billing date, reviews with suppliers at 90-60-30 days prior to departure.

Say Hello, Good-bye with Flair. Start your trip with a bang-up welcome dinner complete with introductions, festivities and a few well-chosen words on your rules of the road. Likewise, on the last night, include an unforgettable farewell dinner so you send them home happy and eager to travel with you again.

Pick the Best Leader You Can. A leader with good social and organizational skills can make the trip even if other operational details go awry.





Operational Hints for Hard Times

Most of us are continuing to offer trips during the current economic downturn. We know that if we stop our travel programs till better days appear on the horizon, we may never make a comeback. However, many of us have had to make certain modifications in our trips – perhaps presenting fewer trips, perhaps offering shorter, less-expensive, closer-to-home offerings. But going beyond those somewhat obvious solutions, here are a few less obvious ones:

1. Work with suppliers you've worked with before, who remember you and how well you worked with them in the past. Now is not the time to experiment with suppliers who don't know you and your track records and who, therefore, are liable to set stricter cancellation penalties, rules and regulations.
2. Work with suppliers who are more flexible in their deposit demands, non-refundable policies, and last-date-to-cancel-without-penalty stipulations.
3. When planning your trip dates, don't just pick dates out of a hat that you think will be good for your travelers or that are popular dates because of weather or festivals or what have you. Reverse your thinking – ask the supplier what dates would be best for him. Often, your willingness to accept a date when a supplier really needs you will result in a much better “deal.”
4. Consider booking into a published tour or cruise date that is going to operate whether or not your group joins. If you only succeed in drawing small numbers, these travelers can still go – whether or not you reached the necessary minimum numbers to operate your own private trip.
5. Consider joining with another organization from the outset so that both organizations feed into the same trip.
6. Consider offering your tour on what is called “tier pricing” basis – that is, different prices depending on how many participants eventually join. For example, if a group numbers 20, the price is \$995, if 15 it's \$1,195, and if only 10, it's \$1,395. You'll note that many adventure companies offer this kind of pricing in their brochures. They invoice everyone at the higher \$1,395 price and if, ultimately, more join, they then refund everyone the appropriate amount just before departure.
7. Try other innovative pricing offers such as “bring along a new friend at half-price” or two-for-one rates. Many cruise lines are doing this type of promotion now.
8. When writing your marketing materials, give your readers a reason why they can justify the trip. Potential travelers may not wish to appear frivolous when others are suffering financially.



9. If designing and costing the trip from scratch (rather than buying into an existing trip), budget more for marketing into your costing formula than you usually do. You may find that you need to do more mailings, more “last call” letters, more public relations, and more raffles and giveaways to fill your trips than you used to. We can no longer get by with just publishing the year’s calendar of trips and putting up a few posters.

10. Consider including some “do good” event within the trip. For example, require that each participant carry a backpack of school supplies and pre-arrange for your group to visit a school and donate these supplies to less fortunate youngsters. Projects like this will bring you more and better publicity prior to the trip.





CHAPTER SEVEN

Some Thoughts On Cruising

In this short chapter I'm "telling it like it is" — the advantages and disadvantages of handling group cruises.

I'm talking about not only the big cruise lines with which you are probably already conversant, but also about small-ship cruising and the newest trend, river cruising. Cruising is one of the most popular group travel offerings possible. And if you're a beginner, it's a great way to start because the cruise line takes care of all the many, many operational details, allowing you to spend your time and energy on marketing, selling, and escorting.

Also included in this chapter is a segment on group escorting aboard a cruise ship—a bit different than escorting on land tours. If you plan to do any escorting on a cruise (or plan to train others to do so), be sure to read this chapter in addition to Chapter 9, the "On The Road" chapter.



Getting Your Group Up The Gangway

Cruises are among the most popular travel products for many. Yet there are a number of folks who may be staying away from your cruise offerings. Perhaps it's time to give cruising a hard look and analyze what will work for your organization.

Advantages of Cruising

First, why do so many folks love cruising? They are pampered with wonderful meals, attentive staff, no work, no worries. Cruises are easy—no constant unpacking and packing, frequent transfers through airports, checking in and out of hotels. At the beginning of a cruise you settle in, and at the end you check out; that's it. Cruises are usually a friendly experience. Not only will your travelers be with your group but they will also have the opportunity to make friends among the other passengers on board. They'll feel safe, knowing that the food, water and hygiene are up to snuff. Those on special eating programs can request medically-ordered meals (advise the cruise line well in advance), so even those on salt-free or low cholesterol diets can enjoy great food.

Members can enjoy interesting ports of call at their own pace, deciding if they wish to take the optional shore excursions or perhaps just browse around port on their own. There's no obligation to keep up with the itinerary pace, as is required on a tour.

Lastly, they'll feel confident financially because cruises are inclusive and most expenses—meals, accommodations, transportation and entertainment—are prepaid.

Perceived Disadvantages

In spite of all these positive features of cruises, there are some travelers who do not see cruises as a viable choice. Some fear they'll be seasick, like they were on a destroyer in the Pacific during WWII. You need to reassure them about new ships and stabilizers. There are those who fear they'll be bored or feel confined. Tell them about the enrichment lectures, movies, evening entertainment, parties and many shore activities. Most lines have health clubs with equipment plus many scheduled exercise and fitness sessions.

Men often have those misconceptions. Hint: offer a Panama Canal cruise instead of the Caribbean. Men love the trip through the canal and enjoy seeing how the machinery works. They identify with the many who built the canal. Men also like cruises that include battlefields or opportunities to play golf in port.

Specialty Cruises and Personalized Activities

You just have to accept the fact that not all travelers make good cruisers. Although cruising is an excellent travel product for many, for those who want to get off the beaten track, or want to explore one country in depth, a traditional cruise is probably not the right product. These



individuals would be happier on an adventure cruise—the Galápagos Islands, for example, or a slow cruise staying in one area—a Burgundy Canal cruise; or a trip along a historic area—like the Inland Waterway. Many sailings feature a theme—square dancing, an eclipse of the sun, a certain period in history or a cultural program, and bring along renowned artists, authors, chefs or other experts. These may appeal to a new segment of your members and start a new travel tradition.

The Bottom Line For You

Cruises not only have advantages and disadvantages from the traveler’s perspective, but also from your perspective as travel coordinator. You can’t tailor the trip to your group’s interests as you can a tour. Customizing can be done for shore excursions or special onboard events or services that you add to the basic cruise.

Another disadvantage to a cruise from your perspective is that the potential for profit, complimentary trips, special “goodies” from the cruise line and even promotional assistance is limited to what can be negotiated among you, the cruise line and your travel agent. The price published in the cruise line’s brochure can’t simply be marked up to cover these items, whereas on a customized air/land tour they can be costed into the tour price before publishing. This often means you might have to accept less popular dates and itineraries—what are called “soft sailings” to get a better deal.

Also, many cruises fill early, so the cruise line will be pressuring you to sell the group space early and may pull the unsold group space away from you extremely early, precluding late promotion and sales on your part. Are your members willing to commit far in advance?

My Best Advice

Offer at least one major cruise per year—more if your organization is large. Do vary the destinations so you’ll get repeaters. Do offer a mini-cruise to entice new cruisers. Consider offering an unusual cruise—an intellectual sailing with lecturers or special workshops, an adventure cruise, a river cruise—in addition to the more well known Alaska, Caribbean and Mexico sailings. Be sure to augment it with your own activities. Be sure to escort it and give personal service above and beyond that provided by the cruise line.



Small Ship Cruising—Is it Right for Your Group?

If you’ve done one or more cruises for your organization, most likely they’ve been aboard the well-known big ships that sail Caribbean, Mexican, Canadian, and Alaskan waters.

As the new mega-size cruise ships have been appearing on the horizon, carrying literally thousands, you may be under the impression that bigger is somehow better.



Small=Not Bad!

There are those of us, however, who think that smaller, not bigger, is better. Not smaller in the sense of older, less desirable, outdated ships. Smaller in the sense of cozy, familiar and comfortable. Small as in personal and friendly.

First of all, small ships can take us to places that big ships can't even attempt: inland waterways, hidden bays, small ports-of-call. They can take us to quiet, white sand beaches with crystal clear waters. They can bring us into historic ports famous in years gone by for noted battles or as shipping ports for gold and silver. They can show us the planet's ecological wonders in less traveled seas.

Small ships can offer us an onboard ambiance not possible on larger ships. Everyone gets to know the Captain, shipboard personnel know your name and your cabin attendant proudly shows you pictures of her child now at university.

Small ships can seat everyone for dinner at one seating. Small ships offer the possibility of getting to know your fellow travelers—not only those in your group, but other interesting passengers on board.

Some small ships ply the rivers of the world, recalling a time when rivers were the roads, bequeathing us historic castles and fortresses on hillsides. Small ships can take us to off-the-beaten-track islands like the Galápagos Islands—a living laboratory to help us understand the wonders of evolution— islands where larger ships are forbidden. Small ships can also take us to many majestic sites of natural beauty—the Norwegian fjords, the starkly beautiful Greek Islands, or secluded coves along Alaska's inside passage.

Onboard Education

Many small ship companies pride themselves on providing an onboard educational component. This might be a shipboard lecture on the antebellum homes of the south while sailing the Mississippi, a discussion of the Huron, Mohawk and Iroquois heritage while cruising the St. Lawrence, or a lesson on the largest mammals on earth while whale-watching in the Sea of Cortez.

It might also mean an informal on-board evening performance by a local folkdance group or an opportunity to chat with a noted lecturer.

If the idea of small cruising appeals to you as a travel alternative for your group, there are a number of companies that range from moderate priced, casual cruises to super deluxe, with a number of other cruise lines in between. Many of these companies pride themselves on their close-up style of cruising and their environmentally conscientious philosophy.

Some Examples

American Canadian Caribbean Line (now called Blount Small Ships Adventures), with its small ships and no-frills philosophy, appeals particularly to senior clientele with its family-style dining and casual lifestyle. Its vessels accommodate less than 100 passengers on itineraries ranging from the East Coast of Canada and the U.S. to the Caribbean and Central America. Destinations include the Great Lakes, Erie Canal and Nova Scotia.



For adventure cruising you might try Lindblad Expeditions sailings in Britain, Central America, Western Europe, the Dalmatian Coast, and our own Pacific Northwest. Also try an Emeryville, California based company called INCA that specializes in small-ship Galápagos Islands trips.

Unfortunately, Hurricane Katrina and its aftermath, helped in the demise of Majestic America Line, which had picked up the Mississippi route and ships of the wonderful Delta Queen Company. Another popular small ship company, Cruise West (which plied Alaska and Northeast waters), advises it is now in reorganization.

Though opportunities for small-ship cruising are less than they use to be, it's a niche that may be just the ticket for your group. Give it a try. They may like it!



Try River Trips for Your Group

Great rivers have played a remarkable role in the development of civilization, so if you have not yet done a river trip for your group, you are overlooking one of the most interesting trips possible.

River Trips to Fit Your Group

Today's river trips can be as basic or as elegant as fits your group's cruising style.

River trips offer many advantages. Like all cruises, there's the advantage of packing and unpacking only once—when you board your vessel, and when you disembark. There's the advantage of smooth waters. There's the familiarity with your ship—you get to know the crew and other passengers, and feel at home.

There's the closeness to shore—bringing you up close to nature, to small towns, to ports where you can disembark and blend in with the locals. And for you, the trip coordinator, there's the simplicity of dealing with one source for all your needs: meals, accommodations, sightseeing, social activities and more. Let's take a look at some possibilities.

Across The Pond

Europe is a feast for lovers of river cruising. Two thousand years of history developed in the basin formed by five great European rivers: the Rhine, Danube, Dnieper, Don, and Volga. Much of this history and folklore may still be seen on a Rhine River cruise today: castles, vineyards, and abbeys.

The Danube, rising in Germany's Black Forest, travels 1776 miles eastward to its mouth in the Black Sea. Its banks are lined with castles and fortresses, many used later as strongholds of the Ottoman Turks as they extended their empire westward from Constantinople. Since 1992, with



the completion of the Main-Danube Canal connecting the Rhine to the Danube, it's now possible to travel the full 2200 mile waterway from the North Sea all the way to the Black Sea.

And certainly the Loire, though only 634 miles long, served as a center for some of Europe's most famous Renaissance palaces. These great chateaux still stand today in France's Loire Valley, as an opulent legacy awaiting today's traveler. Other popular European areas for cruising include Normandy, southern France from Lyon down along the Rhône through Provence to the Mediterranean, and Russia's St. Petersburg to Moscow route.

A mouth-watering trip is the Po, running across northern Italy. It visits Padua where Galileo and Dante studied, Verona, setting for Shakespeare's Romeo and Juliet, as well as Venice, Milan, Ferrara and the islands of Murano and Burano.

Most European river cruises seem to run seven to 16 days, depending on route selected and operate primarily from April into October. You'll want to look at itineraries of such companies as Viking River, Uniworld and Avalon Waterways. www.vikingrivercruises.com; www.uniworld.com; www.avalonwaterways.com.

The Down Side

While river cruising is a wonderful product for many groups, there are several things you should be aware of. Most are not wheelchair accessible or suitable for the physically challenged. Check with the specific company concerned. And because of limited capacity, companies are often not willing to let you hold large blocks of unsold space very long.



Advice for Escorting Cruises

Escorting on a cruise is different than on an air/land tour. Virtually everything is done for the group members by the cruise personnel, so your role is more that of a host/hostess and a go-between from the cruise line onboard personnel to your group members. You're also aboard as a representative of your organization to make sure that everything goes right and that your members get everything that was promised to them.

Many organizations and travel agencies see no reason to send a leader with a group on a cruise. I feel this is a mistake. You need to be there to make your group feel special and to assure their loyalty to your organization in booking future cruises. Here are a few hints.

- ✓ Bring a deck plan from home. Highlight the cabin numbers of your group so you can locate them as necessary.
- ✓ Immediately upon boarding, go around and meet key staff people: the purser, the director of shore excursions, the maître d' and the cruise director (social director). Develop a rapport with them.



- ✓ Also immediately upon boarding, arrange the time and place for a private welcome party and briefing. Often this is free, depending upon the negotiations with the cruise line at the time this group trip was set up. This party is in addition to the captain's welcome party and makes your group feel special. Invite the captain too. He can't always make it, but he might just drop by.
- ✓ Double-check the seating arrangements made for your group with the maître d' (head dining room steward). See to it that all the single women have not been seated together. If there are birthdays or other special dates in the group, the maître d' should be advised in advance so that a cake or festivity can be arranged.
- ✓ If you—and others—don't know all the group members well, consider providing them name tags to wear for the first few days. Sometimes it's difficult to recognize them the second day when they've changed clothes and you end up greeting everyone on the ship for fear of snubbing one of your group! Act as a catalyst to get your group members to know one another, to mix and enjoy the shipboard activities. Invite group members to join you for bingo, or set a time to meet poolside.
- ✓ Talk up the special events and the costume party, helping the reticent ones plan their costumes and feel up to participating. I once saw an entire group of 30 tour members from Salt Lake City twirl on to the stage dressed in white tulle skirts, billing themselves as the Salt Lake Swan Lake Ballet—foolishness no one would have done alone, but great fun as a group activity.
- ✓ Circulate every day and be visible, working and available, perhaps carrying a notebook and pen even when on deck. You might consider scheduling a certain time and place on board to be found each day, if needed. A ship is a big place; sometimes it's difficult to find every group member.
- ✓ Avoid spending a lot of time with passengers outside your group. Your members may feel possessive, convinced that you are on this "free trip" due to them, and may resent time and attention paid to others.
- ✓ Hold a farewell party if there's anything left in the budget. It sends your people home happy, with a sense of camaraderie for the other members in the group and for you and your organization for arranging this wonderful trip.

As you can see, the goal is to make your group feel special. They should feel that they have received not just a good deal financially, but an added value because of how you took care of your group. Discounts are easily available, but do all organizations give that extra care and attention you can give?

Remember, the cruise line will keep each member's name and address and will do all possible to secure their loyalty and participation in future cruises aboard their ships. It's up to you to



augment that loyalty to book through you, your organization or your agency. After all, if the group members are getting exactly — and only — what every other passenger is getting, they could just as easily have booked independently.



Somewhere on the Volga Canal

ABOARD VIKING RIVER CRUISES' *VIKING SURKOV* —I and my group are stalled on our approach to Moscow along the St. Petersburg-Moscow waterway. We've spent five days wending our way through the small, historic riverside towns of rural Russia. Now, as our luxurious riverboat is about to be raised into our final lock of the Volga Canal, we're advised that the lock is temporarily jammed and inoperable.

How, we wonder, are we going to be able to continue our voyage? How soon will the lock reopen? Will we get into Moscow in time for our group's 4 p.m. appointment at the Armory, home of the world-famous Faberge jeweled eggs that we've all been wanting to see. Worry, worry, worry.

Suddenly the loud speaker comes on, instructing us to leave everything in our shipboard cabins and walk into a muddy nearby field. After a while, motorcoaches miraculously appear down the cow path, rescuing us and speeding us into Moscow. No need to worry; the cruise company's management is totally in control, rearranging our Moscow schedule around this inconvenience. I ask myself how would I have handled this were we not in the capable hands of a totally efficient cruise line, solving this problem in its quiet, behind-the-scenes fashion.

I often think how many times as travel planners we are faced with the choice of trying to set up a trip ourselves versus booking it through a tour or cruise company that already has a travel product we can buy into or custom-design for us.

Often we think we can arrange it ourselves directly — perhaps to save money or perhaps because we want greater control. And many times, if we know the territory — particularly on shorter, local trips or simple one-destination visits — and if we feel confident, we do well booking it ourselves directly.

Give Your Group Extras

On the other hand, when a trip is totally out of one's league, as was this past Russia trip, it's usually in the travelers' best interests to book it through a "pro." As many years as I've been involved in group travel and as brave as I am in venturing into new destinations at home or far afield, I've found it more reliable in these cases to book with a company that knows the ropes. Of course, giving up the reins and letting someone else take over can have its pros and cons. Some of the cons are that it may become impossible to program the itinerary to suit your group's



specific needs. Perhaps there are far more walking and standing days than some members of your group can handle. It may mean your group leader has to assert his/her leadership role and give your group “extras” to make them feel special and glad they joined with *you* instead of joining the trip as a regular member of the general public. I modified our package from the outset by negotiating group cruise discounts, special airfares directly with the airlines and by incorporating travel insurance, and some other fees and fuel charges right into our package price. En route I also provided goodies for our group only – special dining tables, welcome champagne reception, etc. I also led our group on shipboard talent night in a short parody of Swan Lake ballet that brought the house down. And since none of us knew our left foot from our right, we hoped they were laughing with us, not at us. Silliness, perhaps, but an evening of fun they never would have done on their own if not part of my group.

Do be aware that the tour or cruise line will solicit your participants for future trips (which may not be what you had planned for them). Be aware that your folks will need special attention from you, even after the trip is over, to keep that umbilical cord connected so that they can hardly wait to travel with you again and enjoy the “specialness” of your trips and the camaraderie they bring.





CHAPTER EIGHT

Some Legal Issues

I call this a “mini chapter”—a chapter small and concise, yet perhaps the most important in this entire book because it reminds you of all the protections necessary. Legalities, travelers’ insurance, contracts, your responsibility clause, tour changes and cancellations, disclosures, cost increases: they’re all here.

Don’t let this chapter scare you. But do read it so you understand some of the more important legal requirements and potential problem areas.



All the Fine Print

One of the most important roles a trip planner plays is that of “nit picker”—the person who reads and rereads every contract, records every important date on the calendar, and asks suppliers question after question. We like to focus on the creative, fun aspects of planning exciting trips, offering them to our membership, and often escorting them in the field. But the truth is we also need to attend to minute details so as to be sure our trips go off without a hitch. It’s no longer enough just to agree to purchase a tour from a leading tour operator for your group, read the contract cursorily, and have tour participants sign a waiver swearing not to hold your organization responsible for anything! Be aware that if you are putting the trip together yourself, dealing with component suppliers, you become the principal legally, and as such, are more vulnerable legally. If, on the other hand, you purchase the trip in its entirety from an existing tour operator, you become an agent of that operator.

Read Those Contracts Carefully

If you are booking the tour yourself and dealing with hotels, coach companies and other suppliers directly, you’ll need to read each supplier’s contract carefully (or if there’s no contract, at least a letter of understanding). Don’t accept verbal confirmations. With hotels, you need to know how many rooms you actually hold and whether they are twin-bedded, double-bedded, single, etc. Are rates quoted to you net or gross? (Gross has a commission in it, net doesn’t). What is the percentage of tax? Is there a mandatory baggage handling charge by the hotel and, if so, is it so much per bag or per passenger? What about a resort fee for activities? How many rooms do you have to sell to get a complimentary room for your tour leader? What about the bus driver’s room? If meals are included in the rate, does your leader also get the meals complimentary? If not, how much must you budget for his/her meals?

You need to understand specifics—how many seats does the coach hold, and of this number, how many can you actually sell? (We usually like to leave some seats in the back empty, particularly near the rest room). Are there big picture windows? Is there a good audio system, tape/CD player, and air conditioner? Is there a limit on the number of miles the coach may be driven per day? What about a limit on the number of hours the driver may drive? Is there adequate baggage space? Vans often have very little space for luggage, whereas larger coaches usually have storage bins under the coach. Do all seats recline? Are the driver’s room, meals, or other expenses included in the quote? Or do you have to budget separately for this? What about parking fees and bridge tolls? How much insurance does the coach company carry? Is the coach permitted access to the airports you may be using? Is it permitted to cross state lines? Be specific!



Deadline Dates

It's also important that you understand deadline dates and enter them on your master calendar so nothing falls through the cracks. By what date must you make your first deposit? Final payment? On what date will the supplier pull any unsold space away from you? By what date do your payments to your suppliers become non-refundable should you decide to cancel the trip? Up to what date can you add late sales? For example, some cruise lines pull unsold space back from you so early that it virtually precludes late promotions.

Most suppliers abide by what we call 90-60-30 day review dates. This means that they expect you to report in to them 90 days before departure to let them know how sales are going. At 60 days prior, they expect you to return some of the unsold space, just retaining what you honestly think you can sell in the next month. And at 30 days before departure, they expect you to cancel all unsold space, submit rooming lists and make the final payment. You should take initiative on these dates—not wait until the supplier contacts you.

Written Disclosure

In writing our publicity material for each trip, it's important that we write from two different perspectives. One aspect is from a marketing/sales perspective, so that the piece is descriptive and the trip sounds attractive and people will want to enroll. However, an equally important aspect is to write from a legal perspective. The publicity piece should sound forthright, not what lawyers call "a puff piece."

It's not just the legal clause that's important; it's the entire tone of the piece. There must be disclosure as to who the tour operator is. There should also be a detailed list of what IS included in the trip and, conversely, what is NOT included in the trip. For example—don't just say "Meals." Say "7 buffet breakfasts, 3 picnic lunches, and 3 dinners all on a set-menu basis."

The Legal Clause

You may call it the legal clause, responsibility clause, disclaimer, or consumer disclosure notice. But whatever you call it, be sure you include it in your written publicity materials. If you're selling from an existing tour operator or cruise line's brochure, be sure to send each participant a copy of his or her brochure with the clause therein. If you're doing your own tour, you'll need to craft such a clause with the help of an attorney, and include it or attach it to each and every trip flyer you do.

Make Them Sign!

All trip participants should sign something. I include a registration form in the publicity material that they must fill out, sign, and return with their initial deposit. The line that they must sign states: "This is to certify that I have read the brochure and responsibility clause and agree to the conditions therein." You or your attorney may think of something better. Regardless, nothing in the world can preclude a traveler from suing your organization; it simply can discourage him/her from doing so, particularly with nuisance claims that may strain your patience, take up time, and involve you in possible heavy attorney fees defending you.





Your Responsibility Clause

You may see your primary job or role as bringing interesting trips to your organization and its membership. It's also important that you think of protecting the organization you represent. You need to learn to look at certain trips from a legal perspective, and wherein you have doubts, to consult your organization's attorney. If you are purchasing tours and other travel programs from existing, reputable tour operators, these operators will already have in place a responsibility clause in their brochures. Look for it in the back of their tour brochure. It may be called a Responsibility Clause, a General Disclaimer or Consumer Disclosure Notice. But whatever the tour operator chooses to call it, it's necessary that your participants see this clause. This can best be accomplished by simply distributing the tour company's brochure to each trip participant.

It's not so important that your participants read and understand every inch of the small print in a responsibility clause. What is important is what is termed "Disclosure" — that you have disclosed who the tour operator is and what their responsibility clause statement is. In the unlikely event that something was to go wrong with the tour, the trip participant would then know whom to look to. It's not appropriate for you to camouflage someone else's tour as your own.

In many cases, however, particularly on short, local tours, you will not be buying your tours from an existing tour operator, but may be putting them together yourself. In this case, your organization becomes a "Principal" — you are the tour operator, and as such your organization becomes more vulnerable legally. In these cases, it's necessary that your organization have its own responsibility clause, which you should publish on your publicity material or attach to whatever promotional material you distribute. This clause should be carefully crafted, with the help or review of an attorney, to be sure that your organization has been adequately protected.

There is no one standard responsibility clause that all tour operators use. If you were to collect 20 different clauses from 20 different operators, most likely no two will be exactly the same.

General Statement

Most tour operators have a general statement absolving themselves of virtually all responsibility for anything. Of course, most knowledgeable travel industry personnel will readily admit that such statements don't really prevent lawsuits as anyone may sue, regardless of whatever responsibility clause you may have published, and regardless of whether the individuals have a valid case or not. Whether they may win the suit is another matter. In fact, one of the main problems operators often have is defending themselves against frivolous lawsuits, and thus needlessly having to spend time and money in the defense. However, most operators continue to publish these clauses primarily as a deterrent to frivolous suits.

A typical general statement might be like this one from Avanti Tours: *"Avanti is the tour operator. Avanti, its agents and representatives act only as agents for purchasers of these packages, in making and securing all arrangements for transportation, sightseeing, hotel accommodations, and other services related*



to the program. Avanti is not responsible for errors and omissions contained in this brochure, nor is it liable for acts of God, fire, acts of governments and other authorities, wars, civil disturbances, riots, terrorist acts, strikes, thefts, pilferage, epidemics, quarantines, dangers incident to sea, land or air travel, and other similar acts or incidents beyond its ability to control."

Changes or Cancellations Of Tours

Above and beyond such a general statement, you should indicate that you have the right to cancel a tour or to rearrange the itinerary. Caravan Tours, for example, states *"The itineraries shown are planned at this time, but are subject to revisions, including the rare substitution of hotels, should circumstances make such changes necessary."* Collette Vacations brochure says, *"Any person reserving or purchasing any Collette Vacations product published in this brochure accepts the condition that Collette reserves to itself the exclusive right to change or cancel itineraries, hotels, and other tour components whenever it is deemed necessary."*

Protection Against Loss Or Theft

Most operators also state that they are not responsible in any way for loss, damage, or theft of luggage and they urge purchase of baggage insurance.

Right To Decline Tour Passengers

Another subject your clause should include is the right to refuse to accept or retain any individual on your tour. While you may never have to invoke this clause, in the rare case you might have to drop someone from a trip en route, this clause can be a legal lifesaver. As an example, Travcoa brochures state *"TRAVCOA reserves the right to decline to accept or retain any person as a tour passenger should such person's health or mental condition or physical infirmity or general deportment impede the operation of the tour or the rights or welfare or enjoyment of other tour passengers, and refund of the unused land portion for tour services is the limit of TRAVCOA's liability."*

Cost Increase Protection

If you are booking an international trip direct, and not working through a U.S.-based wholesale tour operator, you'll want to add some sort of clause protecting you from tour cost increases due to changes in foreign currency rates against the U.S. dollar. Many operators who handle international tours include a statement similar to this one from Avanti Tours: *"Prices contained in this brochure are based on tariff and currency exchange rates at time of printing, and are subject to change without notice."*

A responsibility clause can be lengthy and detailed or it can be short and concise. And while it may discourage frivolous suits against your organization, the best protection for your organization is that any tour promotional material you publish and distribute be accurate and have an air of "plain speaking," not promising tour activities or services that you don't already hold confirmed in writing.





Don't Forget Travel Insurance

One of the least glamorous but most important aspects of the group travel scenario is insurance. I'm not talking about liability or other coverage as protection for your organization. Rather, I'm talking about something we all loosely refer to as "travel insurance," something our travelers need.

I find that many group organizers are often uninformed about the need for trip participants to have this insurance or, perhaps worse, are blissfully offering what they assume is insurance and it's not. True travel insurance is *third-party insurance*. It's offered by non-travel companies outside the travel industry. These companies are often referred to as "plan administrators," companies that bundle various types of insurance together, perhaps from several insurance companies.

These offerings should not be confused with "insurance waivers" offered by cruise lines, tour operators and other suppliers. Waivers are simply something that the traveler opts to buy when joining a trip, usually for a very inexpensive fee, in exchange for the supplier's promise to refund the traveler's monies if he/she has to cancel the trip before departure.

However, it can be deceptive because if the supplier should go out of business, the "premium" and all monies paid in may go, too. Also, it should be noted that such "insurance" is usually only for pretrip cancellation. It does not cover trip interruption, medical coverage and evacuation, baggage loss or damage, or other types of coverage. Many trip planners understand the need for true travel insurance and elect to handle it in a variety of ways. Some offer it on an optional basis as an individual purchase. Others prefer to negotiate with the plan administrator for group rates and package it right into the trip cost. This latter method assures that everyone in the group is covered. You may be surprised to know that some travel suppliers, particularly adventure tour operators, require trip participants to provide proof of insurance or they won't accept them on the trip.

Take Advantage of Group Rates

While packaging the insurance into the trip cost will raise the sell price of your trip, it's also an advantage to your tour members as you can negotiate a much better per-person rate based on group underwriting of all ages and health in the group. On the other hand, individual rates may be based on age and cost of the trip. I am taking a group on a river cruise in Russia this fall and have done this. I've purchased the basic cruise (at a group discount) and shore excursions from the cruise line, then packaged the group insurance, international air, fuel surcharges, and other miscellaneous into the total sell price. Although the price is higher, when it's explained that these features are all included on the traveler's behalf, they love it!

Do Some Homework

I suggest that you secure information from several different companies and compare rates and the coverage statement. First and foremost would be trip cancellation. Most policies cover death,



sickness or accident to the traveler, traveling companion or family member. Check what “family” constitutes. It’s important to understand limitations and exclusions such as psychiatric disorders, pre-existing conditions, war, civil disorder and others. Note that policies may vary from state to state.

Other important coverages are trip interruption and medical evacuation (referred to as medivac or simply as emergency medical transportation). Also important is accident and sickness medical expense, particularly for seniors traveling internationally as Medicare does not cover one outside the United States. Other helpful coverages are baggage loss, theft or damage and something called concierge services. The latter may provide things like emergency cash transfer, nurse helpline, prescription refill assistance and other such en route services. So do yourself and your travelers a favor. The clients will appreciate your looking out for them. And you’ll benefit in several ways: monetarily (commission), time-saving and knowing that you did all possible to provide your travelers a security blanket.



The Importance of Proper Travel Insurance

One of the most important parts of any trip is travel insurance. This is not the kind of insurance your organization probably has for liability, fire and so forth. Rather, I am referring to individual optional insurance your trip participants should be purchasing. Many travelers are aware of trip cancellation insurance, which certainly is a necessary part of travel insurance, but it is not the entire picture. Travel insurance is really a composite of many insurance coverages bundled together: trip cancellation and interruption, baggage and personal effects, medical and emergency evacuation, and in some cases supplier’s financial default.

Some companies, allow buyers to select only the types of coverage they feel they need. Other companies “package” the most popular types of insurance into one offering, selling it as a unit to travelers. Companies such as Travel Guard, for example, are not insurance companies, but “plan administrators,” which means that they offer insurance from several sources packaged into one plan. They are the contact for any claims.

Be sure that your members distinguish between true cancellation insurance offered by a third disinterested party such as an insurance company versus a cruise line or tour operator that offers its own cancellation waiver. In most cases, the waivers (often mistakenly referred to as insurance) are not really insurance at all; they are simply the operator’s pool of fees paid in. If someone then wishes to cancel, the money is returned out of that pool. But, if the supplier were to go out of business, the “premium” the customer paid goes also! Look for what we call “third party coverage.”

Suppliers’ waivers, while often not expensive, are only for pre-trip cancellation received in writing to the tour operator or cruise line up to several days before departure. They do not cover



en route cancellation, called trip interruption insurance. They cover only loss of trip monies—no medical, baggage, company default or other coverages. If you are booking a trip through a retail travel agency, most offer this kind of product. Or, you can sell travel insurance by being appointed as a limited insurance sales agent yourself.

Trip Cancellation and Interruption

A major trip is often the third most expensive purchase individuals make, after home and car, so it makes sense to protect the investment. Trip cancellation and interruption coverage does that—reimbursing the travelers for unrecoverable monies due to pre-trip or en route cancellation for very specific reasons. Most policies' allowable reasons include unforeseen illness or injury of the traveler or family member, jury duty, death, having your home made uninhabitable (due to earthquake, fire, etc.). It does not cover reasons such as simply deciding you don't want to go, change of plans or inability to get a passport in time.

Most plans today do not cover pre-existing medical conditions but may offer it on an optional basis at additional cost. The interpretation of what an insurance company considers "pre-existing" is up to the underwriting insurance company; it may vary from company to company. Passengers opting to purchase the coverage may wish to speak directly with the insurance company prior to purchasing this coverage to avoid later misunderstandings. It should also be noted that purchase of this option is only available if the traveler does so by a specified date well in advance. Be sure this is called to the attention of all trip participants and that you send the insurance information out early enough so they can purchase this option by the deadline.

Baggage and Personal Effects

This coverage is designed to cover on-trip loss, theft or damage to baggage and contents. Travelers should first carefully check what coverage they may have in a home owner's or renter's policy. You do not want to sell unneeded duplicate coverage. Many travelers feel that purchase of this coverage is unnecessary—perhaps because they're not taking pricey clothes or because they assume that an airline's coverage is sufficient. However, many losses occur at times not in any way related to airline coverage. For example, a bag can be stolen at the airport curb waiting to be loaded onto the motorcoach or from a restroom.

Encourage travelers to read the insurance brochure carefully, particularly checking for non-covered items. Items often excluded from coverage are eye glasses or contact lenses, dentures, hearing aids, tickets, money, credit cards and travel documents. The maximum amount paid for loss of jewelry, watches, furs, precious gems, cameras and camera equipment may be restricted. Some policies also cover baggage delay and pay up to a small amount for emergency purchase of essential items if one's luggage is misrouted or lost for more than 24 hours.

Emergency Medical Expense

This coverage reimburses for certain expenses incurred due to sickness or injury occurring while on the trip. It's particularly important for seniors to be reminded of the importance of this coverage—especially on international trips since Medicare does not provide coverage outside the U.S. and its possessions. If their Medicare coverage is wrapped into an HMO (Kaiser, for example), the HMO may provide overseas coverage. Trip participants should always check their own personal coverage, whether through an HMO or some other type of supplemental provider and should query if coverage is reduced or severely limited for overseas travel.



Most medical coverage policies are what is termed “secondary coverage.” That is, the policy usually requires that the traveler use his/her personal insurance first and then the travel policy fills in to pay the differential up to the stipulated policy maximum. Closely allied to medical coverage is emergency medical evacuation coverage often referred to as “medivac” coverage. While infrequently needed, this coverage can save the day financially.

Look at this scenario. A trip participant breaks a leg while on safari in Kenya, has to be air lifted by helicopter to Nairobi for a one-week hospital stay, and then has to fly home with her leg horizontal in a cast. The airline insists that she and a companion travel first class. Costs as much as \$50,000 are not uncommon in this situation.

Default Coverage

Imagine how terrible you would feel if you selected a tour or cruise for your organization from a company which ran into financial difficulty, failed to operate the tour and also failed to refund the participants’ money. Can you imagine the lawsuits that might be filed against your organization if members lost money? Therefore, optional default coverage is highly recommended. This covers monies a potential traveler might lose if a supplier should default financially or declare bankruptcy. However, many insurance companies are no longer offering this coverage.

Of course, we all do our best to select good operators, particularly operators which belong to a protection plan like those of the U.S. Tour Operators’ Association (USTOA). But no plan is perfect and in this day and age of the open marketplace, travelers should protect themselves by purchasing this kind of optional individual insurance coverage wherein available.

Customized Insurance

You may find it worthwhile to have a group travel insurance plan designed specifically for your organization. Many insurance plan administrators—companies which package insurance—are willing to custom design. Some organizations elect to include the insurance plan premium in their trip cost, even though it does increase the tour cost and in some states it is not legal to package it into the tour unless all participants want it. Many organizations want to promote a lower tour price, but strongly encourage travelers to purchase the insurance on an optional basis. Some planners ask members to sign a waiver saying they were offered, but declined, travel insurance and nowadays some tour operators will not take participants unless they do opt to take the insurance. While researching travel insurance is not as glamorous or as much fun as trip planning and escorting, it could turn out to be the most important issue of the entire trip. Don’t overlook it.





CHAPTER NINE

On the Road

This chapter is a “Biggie” because I have a lot of hints I want to pass on to you so you won’t make many of the mistakes I made when first leading tours.

The first time I led a group, it was baptism by fire. I was 23 years old and was sent out with a group of 15-and 16-year-olds on a six week (!) rail trip from New York, across the U.S., down the California coast, then throughout Mexico to Acapulco, and returning to New Orleans, and up the Eastern Seaboard back to New York. I made many mistakes (such as letting one of my teenage tour members drive a truck I rented at Lake Tahoe, never thinking of the legal repercussions that could have followed). Since then I’ve learned to think legally, not just operationally.

I’d like to share with you what I’ve learned about tour group briefings, dealing with step-on guides, and clearing U.S. Customs when returning from abroad. What about group airport check-ins, museum visits, and en route shopping? Then there’s dealing with tour members who want to run the show, don’t wish to follow the schedule, and really don’t belong on a group trip to begin with. How about dealing with guide’s commissions, en route illness, and emotional incidents?

It’s all here, and more...



Tour Leading—The Facts of Life

As I tear around the house throwing things into my suitcase, well-meaning friends and family are calling to wish me well on my upcoming “vacation.” They may think it’s a vacation, but I know that escorting a tour group is never a “vacation,” at least not if one is doing a good job as tour escort.

And, although I’ve been doing this off and on for over 30 years, I still get butterflies in my stomach as I start out on every new trip. Will my receptive operator be there at the airport to meet us when we arrive? Will this be a nice group or will there be one impossible-to-please tour member? Will one of the tour activities turn out to be a big disappointment?

Will someone in the group get desperately ill along the way? And what if my coach driver turns out not to be the gem I’ve usually had in the past?

As these thoughts race through my head, I realize once again what a truly amazing job this position of tour escort/leader/director really is and what a broad spectrum of qualifications we are expected to bring to the position. After years of leading tours myself and hiring leaders as well, I’ve decided that the job description really is that of six people: housemother/father, en route business manager, social director, psychologist, internationalist, and teacher.

People often ask me if it’s necessary to have been there before and in the case of international trips, to speak the language. It certainly helps, but those are not the most important factors. To me, other, even more important qualities make great leaders and make the difference.

Necessary Qualities

First and foremost is leadership ability—someone who may have been a leader in scouting, PTA, or the community. Next is an outgoing personality. This is the individual who is not shy, who can mix socially, speak in public, approach strangers, or give an impromptu introduction or toast.

The third qualification is plain old common sense—the ability to think on your feet and handle emergencies. Another is organizational skills. You want to be the individual who plans ahead and is prepared for tomorrow’s activities with the cell phone at hand, the right change for the bell captain, and the phone numbers for reconfirming events as you go.

Empathy is a quality you need in order to bond with members of your group. And extreme tact is important. You must work well with others—not just your tour members but also suppliers: local guides, drivers, waiters, etc. One needs to get along with various nationalities, educational levels, and ethnic groups; you must always find a way to let the other person save face.



It's helpful to be even-tempered, not to lose control or have emotional outbursts in stressful situations. One's personality should be balanced with a sense of fun and a mix of serious, social, and intellectual attributes.

It's important to exhibit control and firmness without becoming a dictator. Lastly, one must bring commitment to the job. You're with the group virtually 24 hours a day and the group must be your first priority.

How Much Responsibility?

Of course, how much falls on your shoulders and how much on someone else depends a great deal on how the trip is structured. If you are doing a major international tour which your organization has bought through an existing tour operator, then you will most likely have an experienced tour manager assigned to your tour. In that scenario, your role will be more of social director and representative of your sponsoring organization. En route handling of operational details and lecturing will be handled by the assigned tour company's leader.

On the other hand, if you are operating the tour yourself, dealing directly with hotels and other suppliers, you are IT. You will be expected to handle the operational details, maintain the schedule, and chat up the tour members, keeping them informed, educated, and entertained as you move along.

Analyze yourself carefully—as well as those who are volunteering to help lead your groups. If you or they have the necessary qualities, consider it a miracle! If, on the other hand, a volunteer is lacking a number of these qualities, it's better to assign the tour leading part to yourself or others. Some folks are better at trip planning or promoting the trip. It's up to you to evaluate potential escorts and stand by your decisions.

Tour Escorting Hints

Undoubtedly you'll be called on to lead one of your tour groups personally. Or perhaps you'll need to train one of your helpers to do the job for you. If so, what are some of the "tricks of the trade" you'll want to pass on? Like me, you may be so accustomed to leading group tours that you don't give it a thought anymore; you just jump in and assume a leadership role. Or, if you're new to the position, you may have butterflies in your stomach not actually knowing what is expected of you.

With this in mind, let me pass on a few hints. First of all, that first day is all-important. Your participants are a bit nervous and they're judging you, so look, dress and act professionally. I meet them at the airport carrying a clipboard with the name roster, so I can easily identify them by name to see who's there and who isn't.

You'll want to have come prepared—reviewed the itinerary, checked the name roster for any special en route needs, and double-checked that you have everything you need: air schedules, airline record locator number of your group flights, rooming lists, and names/phone numbers of local receptive operators meeting you. If traveling internationally, carry a little money in the currency of the country you're going into so, if you are not met upon arrival, you can maneuver the group into taxis to the hotel.



Early Bird Catches the Worm

One hint is to be early for everything. Be the first one down to the hotel lobby in the morning, ready to check that the coach and driver are there and to greet the local guide. I like to review the day's itinerary with him or her to work out any misunderstandings before I start, not in front of the group.

Another hint is never to show favoritism. The "Golden Rule" is to give equal time and attention to all. Don't eat, sit, drink or dance repeatedly with the same members. Granted, there will be tour members whom you enjoy more than others but this shouldn't be apparent. Circulate.

Fulfill the promised itinerary. Your published brochure or printed itinerary is both a sales promotion piece and a contract so it's important to fulfill all promised activities. Storms, delayed flights, or other occurrences beyond your control may make that totally impossible but strive for it by substituting other special treats or activities in the event something gets cancelled.

Leave on-time for all tour activities. Advise members at your first tour briefing that you will leave at the stated times, even if it means leaving them behind! Make announcements to everyone at the same time—I like to do it in the coach when I have a microphone. This avoids having to ask members to "pass the word," which can result in total confusion. Do not post departure times and activities in hotel lobbies or elevators. Think security—don't alert thieves of where you're going and when.

Lastly, don't let others erode your leadership. If you have members on board who like to "play tour leader," put them to work helping you. And be sure your local step-on guides know they are to look to you as the leader.

Following these "tricks of the trade" will go a long way towards ensuring your trips run smoothly.

All in all, the role of tour leader is an exciting one and a demanding one. Take it seriously; learning from each trip you take so as to make the next one even better.



Ready, Set, Go!

Years Ago I was fortunate to be included in a familiarization tour to Fiji. Upon landing at Nandi Airport, our little group gathered around our tour leader awaiting his instructions. He scoured the airport, looking for the local guide who was supposed to be greeting us – all to no avail. Visibly upset, he then opened his suitcase flat on the waiting room floor and proceeded to fling his clothes hither and yon, frantically looking for the name and phone number of the receptive operator who was supposed to meet us. He finally found it deep among his underwear and proceeded to pile everything back into his suitcase and stomp off to place a call. Needless to say, not exactly a professional first impression!



First Impression

Rightly or wrongly, our tour participants judge us as tour leaders by their first impression of us. Are we professionally attired and groomed? Are we there first, ready for the day's activities? Do we have a list of names and rooming assignments ready for hotel check-ins? Do we know the schedule – what time our flight leaves, what meals are served (or not) on board? Do we know the name and contact of those designated to service our group? Are we ready to answer the million and one questions our trip members may have? I find that the two most important times on a trip are the first day and then again the last night.

On the first day, they're nervous. They're asking themselves, "Am I going to like him/her?" "Does she know who I am and what my needs and expectations are for this trip?" They may be wondering if they're going to get their money's worth and if they'll enjoy the other tour members and make friends. It's important that they feel you're knowledgeable, in charge and well prepared. They want to feel that they're going to have a wonderful time.

The other important time is the last night, hopefully being celebrated with a farewell party so they go home with happy memories of good times together, with laughter, fun, exchange of addresses, and hopefully wanting to travel with you and your company again. To be sure that I start off on an efficient note, I've developed a pre-trip checklist. First I check off all the things I need to take on behalf of the group:

- ✓ Supply of rooming lists
- ✓ Flight schedules showing ETDs and ETAs and in-flight meals offered
- ✓ Name of company greeting me at each destination and their physical address and contacts
- ✓ Emergency contacts for each tour member
- ✓ Photocopies of important correspondence with the various suppliers
- ✓ Airline record locator numbers of group flights for onward reconfirmation purposes
- ✓ A copy of the original trip brochure and/or information bulletins sent to tour members
- ✓ If an international tour, a list of passport numbers
- ✓ Extra baggage tags and name badges

If an international tour, some foreign currency for the first country on the itinerary I like to pack all these materials in a nice professional-looking portfolio, not mixed in with my personal clothing. Next, I like to stop and look at myself as a traveler. Try to avoid packing in the wee hours the night before departure. There's no law that says you can't pack a week before. That gives you time to get shoes repaired, clothes dry cleaned and do a "trial run" to see that everything fits in your bag. Now's the time to get prescriptions refilled or arrange personal transportation to the airport. I find that if I don't set aside time to plan for ME, I end up planning for my tour members but giving myself short-shrift. The job of tour directing is part leadership, being in front of the group and visible. But the other part of the job requires quiet behind-the-scenes organizational skills so that you end up looking calm, collected, efficient and obviously in control.





Airport Check-In Rules

As many of you know, January 1, 2003 saw the takeover of airport check-in by the new Transportation Security Administration (TSA).

If you offer group travel programs that involve air travel, it's important that you advise your trip participants of the regulations governing airport check-ins. Many of your travelers may already have read of these regulations and packing hints, as the TSA has been doing a good job of notifying the public via the press and the individual airlines are posting these regulations on their websites. Nevertheless, do not assume that all your trip participants have read this material; inform them prior to each trip. Anything that's sharp or could possibly be used as a weapon is forbidden in carry-on luggage. This would include pocketknives, scissors and obviously, weapons, explosives, incendiaries, etc. Primary source for information is the TSA's own website: www.tsa.gov, but specific airline web sites are also helpful. Travelers should check TSA updates carefully regarding small amounts of makeup and other liquids now allowed in your carry-on.

Don't Wear Metal

Now that security screen devices have been set to their ultra-sensitive settings, metal sets off the security alarm. If the alarm goes off, passengers will be required to undergo a secondary screening, including a handwanding and a pat-down inspection. It is recommended that one put everything metal in a transparent zip-lock bag which one can toss in the container at security check-in, go through screening, and then grab the bag as it comes through the x-ray machine. If you have participants with a medical implant, they should bring evidence verifying this condition.

Regarding Cameras

Most of us nowadays are using digital cameras which, of course, do not use film. In this case you no longer need to be concerned about screening of baggage ruining your film. Of course, if you are using a film camera, one should pack it in the luggage being checked. In this case, it should be put in plastic see-through bags in hand luggage. At the checkpoint, the entire plastic bag can be removed from the carry-on and one can then ask the TSA inspector for a hand inspection.

Check Your Group in Early

Check, in advance, with your airline as to how early they want you at the airport. This can vary. For example, Southwest Airline's website indicates only one hour in advance for domestic flights Tuesday through Thursday, but one and a half hours Friday through Monday. Air France, on the other hand, specifies two to three hours for its international flights. It's always better to be early than late. Alert your participants to the possibility of lengthy airport waits and suggest they wear socks so as not to be barefoot when required to remove shoes.



Luggage and Packing Hints

Travel light. With quick-wash fabrics, sticking to one basic color, and careful wardrobe planning of dual-use clothing, there's no need to take more than one suitcase plus a small carry-on. This will do for virtually any length of trip to any destination. Most of us find a suitcase with wheels the most convenient, particularly since there are often no porters available in many airports.

The TSA regulation recommends that you not lock your checked suitcase, since the screener may open it. If the bag is locked and TSA needs to open the bag, then locks may be broken. They advise that if they open your bag during the screening procedure, they will close it with care and with security tape and will place a notice within the bag saying that TSA screeners opened it.

It's best not to over-pack the bag so that if screeners open it, they can easily reseal it. Other recommendations include a suggestion that shoes are placed on top and that any books or documents are spread out, not stacked. Food and drink items should not be placed in checked luggage. And, if your trip participants are buying bring-home gifts, advise them to pack them unwrapped.

Have it Together at Check-in

You'll want to be sure that your trip members "have it together" at the time they step up to the check-in counter. If traveling domestically, they'll need a government photo ID. If traveling internationally, a valid passport is required for most countries. Check with the consulates of the countries you'll be visiting regarding visas, if required.

If you have any participants who are not U.S. citizens, it's important that their documentation be carefully checked. Many long-time travel agents and tour operators may advise against traveling "ticketless" internationally, feeling it's worth the small additional per person charge for a "real ticket." But ticketless travel is becoming more and more popular. While air travel is not as easy as it may have been in years past, with proper advance planning you can help your participants' trip go more smoothly.



Your On-The-Road Tour Briefing

One of the most important tour events is a good on-the-road briefing, often called an orientation meeting. This is your opportunity to get the entire group together for a discussion of how the tour will operate. Now is when you can introduce your rules of the road.

I give this briefing within the first day or two on tour, not at the predeparture meeting at home. This ensures that everyone in the group will be present. It also permits your tour company's tour manager, if you have one, to assist you, contributing ideas and procedures.

Some tour operators like to give a welcome cocktail party or dinner, followed by the briefing. However, after a drink or late in the day, tour members may not be attentive. My favorite



briefing time is at breakfast. Participants do not expect cocktails at that hour and it starts the tour off on the right foot.

Your briefing is your chance to tell everyone at the same time what to expect of you and the tour management during the tour, and also what you expect of them. The success of a tour depends not only on what they get, but also on what they give. Here are the points I cover.

On-time Departures

The group will not wait for habitual latecomers. It is the individual's responsibility to wake up, have breakfast and be in the lobby ready for departure on time. I do not take the responsibility for waking everyone. I stress that tardiness is a discourtesy, not only to me but to the other participants. I scare them by saying I will leave on a day's tour activities without them, and I have!

Coach Seating Rotation

I remind them that everyone paid the same trip price; therefore everyone is entitled to a chance at the front seats. I always keep one front seat for me so that I am near the microphone and may listen to what our driver and guides are plotting. I re-emphasize a no-smoking policy aboard the coach.

Courtesy to Others

Participants are expected to be gracious and courteous to everyone, no matter how tired or out-of-sorts they may be. This means courtesy to each other as well as to the locals with whom they come in contact: guides, waiters, hotel personnel, the coach driver and customs or immigration officials. Unkind behavior will not be tolerated, even if the other person is wrong. If they have complaints, they should come to me first.

Attention to Guides

Local guides have a great wealth of information to share with the group. Tour members pay for a tour guide's expertise and should benefit from the knowledge and be attentive to the guide, not chat with a seat mate or run off to take photos or shop in the middle of the guide's presentation.

Security of Valuables

Tour members should have been advised in a pre-tour bulletin not to bring valuable jewelry, heirlooms or irreplaceable photos or memorabilia. Urge them to check any valuables they have brought with them, including money and travelers checks, in a hotel safety deposit box. They should never leave their camera slung on the back of their chair, or let carry-on luggage out of their sight. At the pool or beach, they should not leave watches or other jewelry to tempt the less fortunate. Women should keep purses zipped and close to the body at all times; men should not carry their wallet in a rear pants pocket.

Hotel Departures

Advise them the night before each hotel departure what time they must have their suitcases ready for the bell staff. State the time they must be in the lobby for boarding the motorcoach. Remind them that tour management pays the basic hotel bill—room and tax, and sometimes breakfast—but that they are individually responsible for checking out, paying any individual charges posted to their room and turning in room keys. I suggest they check-out the night before each departure, if the hotel permits this, so they won't be delayed in the morning.



Tipping Policy

Remind participants which tips are included and which are not. Hopefully, earlier written material sent to the members has outlined this, but even so, they may not recall specifically which tips the tour management is paying on their behalf and which they should pay themselves. Mention waiters, room maids, airport porters, hotel bell staff and local sightseeing guides. On a cruise, discuss the cabin steward and dining room personnel.

Particular attention should be paid to the end-of-tour gratuity to your on-the-road tour manager, if you have one, and your coach driver. If gratuities to these two individuals are not included in the tour cost, tour members should be advised of an appropriate amount so they can set aside money.

I find that \$5 per day per passenger is the standard amount for a tip to a tour manager today, and about half of that for a driver. The decision as to whether each participant tips the two persons individually or whether you pass the hat for a group collection is up to you. I hate passing the hat, and find it much nicer to have each tour member write a personal note and hand it to the individual in a closed envelope with the money inside. Bring envelopes for this purpose and pass them out at the end of the tour.

Meals and Food Safety

State meal hours and arrangements. Depending upon your destination, discuss food and water safety and suggest bottled water, peeling fruit and staying away from raw vegetables. Mention local foods that are particularly good, and local dining customs. Remind them that imported wines and liquors will be expensive; so will mini-bar items.

Your Availability

Last, but not least, lay out some parameters of your availability. For me, it's 8 a.m. to 10 p.m. Of course, I'm available at any hour for a member's illness or real emergency.



Escorting Like a Pro

Whether you call yourself a tour escort, leader, director or manager, your basic purpose on trips is to lead. Other qualities are important, such as knowledge of a specific destination, its customs and language, ability to interact well with others and strong en route organizational skills. But the single most important quality is that of leadership.

Go Prepared

Do your homework before you depart, not en route. You should have read and re-read the itinerary, reviewed the passenger list and any special needs, and carefully checked the tour documentation you are carrying to be sure you have everything necessary — vouchers, air



schedules and the airline record locator number of your group flights. Also, extra rooming lists, and names/numbers of local receptive operators.

Be Early

One of the best leadership hints is also the simplest—be there first. Arrive at the airport check-in counter well ahead of your group and double check all arrangements. Each morning, be the first one down in the hotel lobby, ready to check that the coach and driver are ready for your group and to greet the local guide and discuss the day's activities. Work out any misunderstandings and the day's plan with them before you set out, not en route in front of the group.

Never Show Favoritism

The "Golden Rule" is to give equal time and attention to all. Everyone assumes they are entitled to the same amount of attention. Never eat, sit, drink or dance repeatedly with the same members. Circulate.

Dress and Behave Professionally

You must dress and present yourself as a leader, in addition to acting as one. You don't always have to wear dress shoes and panty hose or a coat and tie, but you must dress well. Project an aura of professionalism in dress, demeanor, speech and attitude.

Fulfill the Promised Itinerary

Your published brochure or itinerary is both a sales promotion piece and a contract. It's important to fulfill all promised activities. Storms and other occurrences may make that impossible, but you may be able to substitute other activities at other times, if needed.

Do Not Let Others Erode Your Leadership

There are always participants who would like to "play tour leader." If you have any of these folks on board, let them help by passing out games or printed materials, for instance. Members shouldn't vote on what the group will want to do each day; you are the leader and you make the decisions.

Make Announcements to Everyone at Once

I make them on the motorcoach while I have everyone together and I use the microphone. Don't ask tour members to "pass the word;" messages can become easily garbled.

Circulate

At meals, make sure everyone is being served. Don't just sit down and assume that everyone is well taken care of. Interact with the waiters. Remind members what's allowed on a tour meal and what's not, so they don't order something and later find it is at their own expense.

Leave on Time

Make it clear from the start that you plan to leave at start times, for the benefit and enjoyment of everyone. Remind them that tardiness is a discourtesy to other tour members.

Prepare Your Group

Tell them where and when they will reboard the coach. Tell them if the driver will remain on board, whether they can leave items aboard and the coach number, so they can find you if they wander from the group or return early.





Dealing with Local Step-On Guides

There are many times when you are operating your own tour, particularly on short one-day and longer tours. It may be up to you to hire occasional local guides, called “step-on guides” or sometimes just “step-ons.” These guides will provide your group with specific historical or cultural information, local customs, legends and colorful stories about an area. The step-on may also possess practical knowledge that will ease your visit, such as where motorcoaches are allowed within a city, museum hours or what local foods are special. Step-ons may be hired for a half-day city tour or contracted for longer periods of time. Most step-ons expect to go home at night and report to you at your hotel each day, as contracted for, only stepping on to your coach and joining your tour for a certain amount of time.

Locating a Good Step-On

Where do you find step-on guides? A good place to start is the convention and visitors bureau. Most are willing to give you a list of local step-ons. Other sources are your contacts at attractions and hotels in these cities. Many step-ons are very busy at certain times of the year, so scheduling your guides should be done well in advance. Also, you’ll need to know their fees well in advance so you can budget the costs into the tour price.

I expect those handling my groups to report early, not breathlessly at the last minute—at least 10 minutes in advance of daily departure time, so that the two of you may discuss that day’s schedule privately to be sure you’re both on the same wave length.

Local guides should dress professionally. They should be neatly dressed and groomed and reflect that area’s attire. In some places that means a coat and tie or a pants suit, while in other places (like Hawaii or Arizona) it may be a resort outfit or western wear.

They must have organizational skills. They will need to reconfirm with hotels and restaurants as to your arrival times and they should have necessary phone numbers at their fingertips to accomplish this. Most carry cell phones.

The day’s schedule should be maintained. Step-ons should see that the group departs each spot on-time and that everything promised for the day’s activities is actually accomplished.

The guide should keep control of the group, maintain their attention and announce in advance what’s coming up.

It’s important that my tour members know if the coach is going to be parked and locked and whether there’s much walking ahead. Where and when can they meet if they get separated from the group?



A guide should not continually solicit for optional events, shopping and other activities on which a commission can be made. If such events are going to be offered, I expect him/her to discuss it with me in advance.

It's important that guides can give more than just dates and historical facts. They should have a good cultural understanding of the particular city, country or area, should be attuned to the group's interests and physical capabilities, and should be sensitive to the amount of information the members can absorb.

Quid Pro Quo

We all have great expectations of these folks who service our groups. But they also expect certain courtesies. I formally introduce, by name, every tour manager, guide and driver to my group, welcoming them to our midst. I intervene if I discover a tour member hassling, constantly interrupting or being discourteous to a guide. While I might augment something a guide has told the group, I'm careful not to interrupt or contradict.

I ask the group to listen and not talk among themselves when the guides are talking, as guides are often too polite or too fearful to tell someone to please be quiet and listen. And, I see to it that tour participants are properly advised as to the correct amount of tip to give the guide.

Lastly, I'm aware of the importance of letting the guides "save face." I never tell them what to do or argue with them in front of my travelers. Many guides have years of study and experience invested in their careers and, in some U.S. cities and many foreign countries, they have had to pass demanding national or local exams. It's important to ride that fine line of maintaining yourself as the leader, while never appearing to undercut their role.



Museum Visits Made Easy

Museums are prevalent the world over. Yet, many tour leaders find museum visits difficult going for tour groups. Leaders tell me that you have to wait in line too long, it's too tiring, there's nowhere to sit down, too many stairs, not enough restrooms, and so forth. They also often mention that not enough group participants are interested in everything they're seeing, that they can't hear the guide or understand him/her. They even tell me tales of tour participants who have wandered off into never-never land, driving tour leaders nearly mad.

Avoiding Museums?

If these are some of the reasons you've avoided museum-going, perhaps you are not planning appropriately. And perhaps, therefore, you are missing interesting and educational experiences that could be woven into most any trip. The first step is to know your museums—learn which cities have interesting museums—not necessarily the biggest, but the most appealing. The tour operator you are using may already know a city's museums and may have scheduled you there; others may not and may depend on your asking for such a visit.



Smaller Museums?

I often find some of the smaller and more personal museums easier. For example, I was entranced in Ireland by the Dublin Writers Museum with its collections of early manuscripts and first editions of the likes of James Joyce, George Bernard Shaw, William Yeats, Samuel Beckett and others. The Rodin Museum in Paris, housed in a magnificently restored 18th century townhouse, allowed me to spend time with *The Thinker* and *The Kiss*.

Many museums are so huge that it may be necessary to choose what you'd like your group to see. At the vast British Museum in London (www.thebritishmuseum.ac.uk), I met with the guide in advance and arranged to have my group see only the Rosetta Stone, the Elgin Marbles, and the Mummies—with a fairly in-depth explanation of the importance of each, and then with free time afterward.

The method of scheduling your group's visit in the morning works so that after the tour they may have the afternoon free to purchase lunch and see other exhibits of particular interest to them or go shopping—all meeting back at the hotel in time for dinner.

It also helps to explain any special interests of your group to the guide or docent. For example, a tour group with a number of men in it might enjoy the exhibit of Arms and Armor at New York's Metropolitan Museum of Art, whereas an all-ladies group might appreciate its Costume Institute, showing fashion through the ages.

Advance Reservations

By all means, do all the practical things to make the trip run more smoothly. Make advance reservations for starters. Coming into the small town of Giverny, France and seeing a line down the street and around the block all trying to get into Impressionist painter, Claude Monet's home and garden made my group gasp. But when we were all able to walk right to the front of the line because I had insisted that my tour operator pre-book a specific entrance time, they all applauded me!

Start at the Top

Other practical hints? Start at the top floor of a museum and work your way down, not the other way around. And certainly if you have people with difficulties in climbing stairs, respiratory problems, and the like, check out the availability of elevators in advance. Find out where restrooms are, and insist that the group all avail themselves before the museum guide starts off with your folks. Establish a meeting spot in the museum in case some people get separated from you and your group and don't know how to find you.

If you feel your group is too big for everyone to hear properly, consider breaking it into two smaller groups—each with its own guide. (Note—some museums will let you come with your own guide; others will require you use a museum guide or docent).

City Passes

If you're planning to visit more than one museum, stately home, or landmark site in a given city, check out some of the passes that include entrance fees to many city sites for one package price. You might want to think as to how you could wrap a tour around a specific museum's blockbuster show, but check if there is an additional fee.



Museums are doing everything possible nowadays to make their offerings more appealing to all ages, more accessible, educational, and fun. It's up to us as group developers to use them in our travel products.



Shop 'til You Drop? On My Tour?

If there's one activity on tour that can be a fun and positive experience or a real nightmare and negative experience, it's en route shopping. According to a study by the California Division of Tourism, the number three activity of visitors was shopping, after dining and entertainment—not sightseeing, not enjoying the beaches or national parks, not touring.

Shop 'til You Drop-or- Drop those that Shop

In any given group, there will always be some who love shopping and some who absolutely hate it. Those who love it squeal with excitement and yell “Stop the bus” at the sight of shops, markets and open-air fairs. Those who hate it may groan or quietly resent the time taken away from other activities. More often than not it is women who enjoy it and men who hate it, although many individuals cross over. Some men may not only resent the time spent but the money spent as well! Here are my favorite hints for dealing with the entire issue:

Prepare tour members. In your pre-departure written materials to tour members, suggest that they plan ahead for shopping, keeping in mind upcoming birthdays, Christmas and wedding showers. They might want to bring some notes on sizes and favorite colors of those for whom they may be buying gifts. Suggest also that they compare prices at home before they leave; sometimes it's less expensive to buy at a local discount house!

Suggest that they purchase soft, packable items rather than breakable pottery or glassware. I particularly like to purchase table linens, wall hangings, weavings and pillow covers—particularly if hand made and of unique ethnic origin.

Of Local Interest

Read up on the area you'll be visiting so you can tell members what the specialties are in advance of the trip. Ask visitors bureaus and other destination resources about products crafted in their area. You might recommend macadamia nuts, quilted items or wooden bowls from Hawaii, pralines from New Orleans, or cashmere from Scotland. For a tour to Italy I recently escorted, my departure bulletin said: “Of particular interest will be Italian silks and knits, Florentine straw goods, gold jewelry, leather (shoes, gloves, wallets and other small leather goods), stationery, pottery, ceramics, embroidery, art books, luxury bed linens, masks, antique jewelry, and much more.”

Suggest that tour members pack an expandable flight bag inside their suitcase, which they can then use to fill with purchases and fly home with two bags, although many airlines charge extra



for the second bag nowadays. (Sometimes the land tour portion of your tour may only allow one bag due to room in the coach or budgeting tips to hotel porters.) If coming home from a foreign country, it makes sense to have all purchases in one bag in case U.S. Customs should want to review purchases.

Shop on Your Own Time

Try to plan itineraries with free time in each major city so that those who are really interested in extensive shopping may do so. This way, they may come back to stores which really interested them without holding up the whole group.

At rest stops where you know your group may get caught up in browsing and possibly shopping, always announce before leaving the coach how long you will be stopping, so that folks know there's a time limit. I usually then go around the shop and give everyone a "five-minute warning." What you want to avoid is a situation wherein everyone is back on the coach on time, ready to depart, with one person still in the shop holding up everyone else.

Be sure your pre-tour information bulletin carries some sort of statement absolving your organization of responsibility for any shopping activities. I got tired of tour members asking me to exchange videos they bought at Iguassú Falls because they bought the wrong speed or claim refunds on cuckoo clocks they purchased in the Black Forest of Germany because they no longer cuckoo'd. I use the following statement now: "At all times we urge you to be cautious and discriminating in your purchases. We regret we can't be responsible for any shopping activities and are unable to intervene on your behalf in the event that merchandise doesn't live up to your expectations or if shipped merchandise doesn't arrive."

If traveling internationally, advise tour participants of U.S. Customs rules. Travelers may bring in \$800 per person duty-free. The next \$1,000 of purchases are taxed at a flat 10 percent. If they ship things home from overseas (or have a store ship them) they will be charged U.S. duty upon delivery into the U.S. Items which do not accompany the traveler may not be counted as part of the \$800 duty-free.

Guides' Commissions

What about commissions to guides on your group's purchases? Overseas, your guide usually receives a commission from the shop on all purchases by your group. In some countries it's particularly prevalent because guide salaries are so low that they depend on tips and commissions for the bulk of their income.

My current feeling is that IF the quality of merchandise offered in the shop is as good or better than offered elsewhere and, IF the prices are equal to or less than offered elsewhere, I see no problem. However, I definitely resent it if the tour members are being herded into a shop wherein quality is inferior or prices inflated just so the guide can earn a commission. Such visits to shops should not interfere with the day's tour pacing so that something promised on the tour itinerary gets omitted due to a time crunch.

Sometimes "factory visits" are an opportunity to see artisans at work—tooling leather, blowing glass or whatever the local specialty may be. If this is the case, it can indeed have added tour value. But other times the "factory" label is just a gimmick. On my recent tour to Italy, a visit to a goldsmith in Florence turned out to be a visit to a gold jewelry shop, so we opted to leave.



All in all, shopping can be an exciting part of every trip, when you plan for it in advance and carefully manage it en route.



Helping Trip Members Remain Healthy

As trip arrangers and leaders, we face many challenges when out in the field with our groups. We expect the usual challenges of seeing that our trips run smoothly, our participants enjoy themselves, our step-on guides are excellent, our meals delicious, and our hotels attractive and comfy.

But occasionally we have to face something we don't expect, like a tour member becoming ill or injured while on tour with us. Do we have any procedures in place as to how such an occurrence should be handled? If not, perhaps now is the time to think about this and sketch out some thoughts as to the best way to deal with such an en-route happening.

Of course, the best procedure is to pre-plan so that hopefully our trip members start out healthy. I like to suggest in my pre-departure information bulletins that everyone have a medical and dental checkup before embarking on a major trip. I also distribute a form that I ask each member to complete and return to me well before the trip that gives me the name and contact information of their personal physician and the number of their medical insurance policy.

I also ask questions about their health history that may be pertinent to the trip. For example, if the trip includes visits to high altitudes, you would want to know if anyone had a history of uncontrolled high blood pressure, cardiac disease or even asthma or other respiratory condition.

I remind participants in my pre-trip information bulletins to be sure to take an adequate supply of any medication with them (not packed in their checked luggage) as well as a copy of the prescription with generic name and dosage in case an en route refill should become necessary. I recommend they take their eyeglass prescription as well.

One of the reasons tour participants often become ill while traveling is not only that they are encountering new food and bacteria along the way but they are often pushing themselves beyond their strength because they don't want to miss anything. They've paid for it, by golly, so they're not going to skip an activity even if they don't feel up to it.

I purposely try to plan day-to-day schedules so that everyone can get enough rest. If you've had an early start and a full morning activity and you have an evening event planned as well, give them a free afternoon to catch their breath. The problem is that once they've become overtired and are pushing themselves, they become more likely to lack the resistance to ward off colds, the



flu, or whatever's going around. This can be a particular problem on a coach tour where a "bug" will make the rounds throughout the group one day after another.

I also like to suggest that each trip participant carry a mini first aid kit ... nothing big and bulky. This could include aspirin, a few band aids for blisters, perhaps some Tylenol or similar, a disinfectant, maybe some antacids. You, as tour leader, may wish to carry a more complete kit or check with the tour company with which you'll be traveling as to what their company policy is and what their tour leader will be carrying. You'll want to check what medical training, if any, their tour leaders have and how they are instructed to handle en route medical emergencies.

In the next issue we'll be discussing more serious en route medical emergencies: locating reliable medical care on the road, dealing with occasional medical evacuations, the "Good Samaritan" law and other legal/medical issues. While such events may never happen on your trips, and while such issues may not be as glamorous as the fun activities on a trip, it's good to give it some serious thought and be prepared.



Handling Medical Problems on Tour

In our last issue we discussed what trip planners can do to help travelers remain healthy en route, particularly by making itineraries that allow sufficient time for tour members to pace themselves, get enough rest and take their medications as they go along. We also mentioned the importance of getting pre-trip information from each traveler regarding insurance policy, physician's name and emergency contact. But sometimes all the planning in the world cannot prevent an on-trip accident, the onset of a new illness or reoccurrence of an old medical problem. And while most of us are not licensed medical personnel, a bit of knowledge can literally be a lifesaver at one time or another in our travel career.

As many years as I have been in the travel industry, just this fall my husband and I decided to take a four-hour brush-up first aid class at our nearby adult education center. If it's been some years since you did this, I would urge you to do it again soon. Many folks may ask, "But can we be held legally liable if we try to administer first aid?" The Good Samaritan principle holds that in most of North America, you have no legal obligation to help a person in need but that you are generally protected from liability if (a) you are reasonably careful, (b) you act in "good faith" and not for reward, and you not leave them until someone with equal or more emergency training takes over. You also must get permission from the ill or injured person to help.

In most cases if you are in urban areas, on major cruise ships or at decent hotels, you will have access to local medical help. Most cruise ships carry a doctor; small river vessels and freighters may not. The better hotels have access to "house doctors" – not doctors who live at the hotel, but doctors who are "on call." Many hotel managers will tell you, however, that in case of real emergency it's better (and faster) to call 911 rather than waiting for the house doctor to show up. If you are traveling on a tour that you have purchased for your travelers from a major tour



operator, that company should already have in place a risk management protocol that its tour leaders are instructed to follow in medical emergencies. It behooves you to query this protocol at the time of agreeing to sell the tour operator's program to your group. Adventure tour operators are particularly well prepared; most of their leaders have had extensive training in first aid, CPR and medical evacuations.

A Scare in Bogotá

However, if you have put the trip together "from scratch," you are IT in terms of leadership and then such emergency handling falls on you. It's in times like these that we are thankful that we have arranged to work with the best operators and not necessarily the least expensive. I recall early in my career finding one of my tour members lying on the bathroom floor of her hotel room in Bogotá, Colombia. She was screaming in pain, and as it turned out was having a gall bladder attack and had to have surgery that very night! I was thankful to be working with a great receptive operator there in Bogotá — the company owner got out of bed in the middle of the night, summoned her chauffeur and came down to the hotel. Within a couple of hours she had the patient admitted to her personal doctor's private clinic and proceeded to handle the entire situation during the coming days while I attended to the other 29 travelers in my group and continued on to Ecuador.

Do your homework. Be sure your trip participants have given you their medical contacts. Be sure you've clarified with your tour operator or cruise line what their protocols are. Consider incorporating medical coverage insurance (and evacuation insurance – called medivac coverage) into your trip package. Or, if not including it, urge your travelers to purchase it optionally. (Note: Medicare does not pay overseas!) If traveling internationally, consider a great non-profit Canadian organization called the International Association for Medical Assistance to Travelers (www.iamat.com), which publishes a list of English-speaking doctors worldwide along with a set schedule of fees.



People's Personalities Can Affect Your Tours' Success

All of us involved in planning group trips like to think that everyone should join our trips. Yet, did you know that there are some people who you don't want on your trips? Sadly, there are people whose needs you may not be able to satisfy and who could ruin the trip for the others in your group.

Let's develop strategies for converting their attitudes, or if necessary, counseling them against joining a particular trip.



Independents

The highly independent person who is unable to conform to a schedule or follow someone else's plan might be detrimental to your tour. These people are constantly late, and oblivious that they are being discourteous not only to the leader, but to all the other group members. Perhaps they don't like to mix and contribute to the overall camaraderie of the group, and want only to be by themselves. Couples, too, can exclude others, unwilling to invite others to join them for a meal or a stroll during a tour. Can you find two independent types with similar interests? They can prowl a city together and thus be more a part of the group.

Highly independent folks, if they are enjoying one destination, may resent having to leave with the group for the next city. They like to take each day as it comes, depending upon their mood. These are folks you need to carefully advise in advance. Explain to them the itinerary. Suggest that if they want a more in-depth trip to a destination, they help you research that in advance and you'll promote that in the future. The same strategy applies to those who want to focus on a special interest.

Takers not Givers

The "Show me. Gimme. I'm entitled!" attitude. We all know people who are unwilling to understand that a great part of the success of a group trip is the social interaction, the friendships and the fun which everyone helps create. They instead focus only on the services—nice hotels, great meals, etc.—and they nitpick!

Use the group itself to reinforce the positive aspects of the trip. Start the morning ride with "What did each of you like best about yesterday?" or "Who told the funniest joke last night?" Their praise tends to negate the complaints and keeps the mood upbeat.

People who are strong leaders themselves may find it difficult at times to let someone else hold the reins and may even try to challenge the tour leader for control. Assign them small leadership tasks. Ask them to research a specific museum and lead a discussion on what the group will see, or have them arrange the birthday celebrations en route. These responsibilities will keep them occupied, allowing you to continue leading the group.

Health Problems

Through no fault of their own, these may not make good tour candidates because they may not be able to keep up with the pace of a particular trip, or they cannot have their individual needs consistently met—special diet, a midday rest, limited walking and standing or particular medical requirements.

Sometimes these people do very well on a group cruise, or a hub-and-spoke tour. On cruises, with advance notice, special diets are easily honored aboard ships and each passenger has the flexibility of joining or not joining optional shore excursions and other events. One-site trips or hub-and-spoke trips are also good for these people, because they can participate in the group flights, accommodations and a few key events, but have a lot of free time or find activities which match their physical capabilities.

On any trip, plan a variety of options. Ask various attractions or locations ahead of time about less strenuous alternatives. They are accustomed to handling folks with various physical limitations. At a visitor center, some folks may head for a trail while others may prefer to see a



film about the area. By giving options, you don't have to single out individuals, but allow anyone to choose or not choose a certain activity.

Carefully Qualify New Tour Applicants

Ask questions which will allow you to learn about their personality as well as their travel experiences, preferences and behaviors. You may have to gently suggest that the tour they are inquiring about may not meet their needs or standards, and that they may prefer one of your other programs—or perhaps an independent trip.

Don't be afraid to highlight some of the guidelines you have created for your trips. These are rules and suggestions you give to the entire group at a pre-departure meeting, and these can be reviewed in advance of tour signup if you think a particular person would not be willing to abide by these.

Also, your written materials should always carry these or similar words: "The right is reserved to decline to accept or retain any person as a member of the tour at any time." Check with your organization or attorney about such wording and guidelines.

Just because we want to fill our trips, we may not be doing our job if we accept everyone who comes our way. In the last analysis, our primary responsibility is to the group as a whole, rather than to any one individual. Dissatisfied travelers will complain about your tours to everyone they know. It may be better to carefully counsel them in advance and show them travel alternatives which would please them more.



Clearing U.S. Customs When Returning From Abroad

Many organizations are concentrating on local trips or on-the-road U.S. trips. However, more and more travel planners are reporting increased interest and participation in international trips. As more of your trip participants anticipate trips abroad, they may have questions about U.S. Customs and its rules. Here is information to share with your travelers.

Duty-free Limit: \$800

U.S. residents returning to the U.S. may bring in \$800 per person duty-free purchases if they have been away 48 hours and have not claimed this \$800 exemption within the last 30 days. Family allowances may be pooled so a couple could be entitled to \$1600, a family of four \$3200 and so forth. The \$800 value is based on fair retail value in the country where acquired. Certain items such as bonafide antiques over 100 years old and original works of art (unframed) are duty-free.

There are more generous exemptions for visitors returning from the U.S. possessions of American Samoa, Guam or the U.S. Virgin Islands, as well as some 24 countries covered by the Caribbean



Basin Economic Recovery Act. Special arrangements are also being phased in for NAFTA-pact countries Mexico and Canada. Consult the U.S. Customs Office for details.

The exemption may include one liter of alcoholic beverages, one carton of cigarettes and 100 cigars (not of Cuban origin). State laws governing liquor may be more stringent than the Federal law, depending upon U.S. re-entry point.

Travelers must bring the \$800 of merchandise with them when entering the U.S. in order for it to be duty-free. Things shipped separately by the traveler or store may not be included in the duty-free allowance. Travelers will be assessed duty when the goods arrive at their home.

A flat tax on the next \$1,000 of merchandise claimed is 10 percent. Many times shopping abroad is still a “good deal” even at this tax rate. Over \$1800 each item is taxable at the various rates of duty applicable to the specific articles in question.

Returning Home

En route home, in-flight personnel distribute a customs declaration form to each passenger. Those who have not exceeded the \$800 per person limit may simply fill in the basic data requested and make an oral declaration to the inspector. Those with purchases totaling over \$800 must list all purchases they are carrying and the approximate price they paid.

Keep receipts of major purchases made while on the trip. Purchases can be grouped together in categories, i.e.: leather, silver and clothing. Travelers should pack all purchases together in one carry-on suitcase.

Any duty assessed by the customs officer is to be paid on the spot. Acceptable methods are U.S. currency, personal check or travelers’ checks. In some locations it may also be possible to pay via VISA or Mastercard. Foreign currency is not accepted.

Gifts

Most travelers bring home gifts to friends, family and colleagues. The decision is often whether to bring them back in luggage or ship them separately.

If you are planning to bring them with you, soft items like clothes, table linens or non-breakable toys and other items make the best choices.

An alternative is to have gifts shipped directly to the recipient. Bona fide gifts up to \$100 in fair retail value may be shipped and received by friends and relatives in the U.S. free of duty, as long as the same person does not receive more than \$100 in gift shipments in one day—the “day” in which the parcel was received for customs processing.

Travelers who opt for this method must be sure that: (a) gift packages are clearly marked on the outside wrapper as “Unsolicited Gift”; (b) the nature of the gift is listed—shoes, toy truck, etc.; and (c) the fair retail value is listed. U.S. postal laws prohibit shipments of liquor.

Duty-Free Shops at U.S. Airports

Many U.S. airports have duty-free shops, available only to those who are leaving the U.S. Travelers shop there before boarding an outbound flight and merchandise is then delivered



aboard the aircraft. Liquors, perfumes, cameras and other luxury items, on which there is normally a high U.S. tax, are particularly good buys.

If you purchase something at a U.S. airport duty-free shop that you will be bringing back into the U.S. on your return, it counts as part of your \$800 allowance, exactly as if you bought it overseas.

Shipping Items to Yourself

You may decide to ship certain purchases to yourself. These items may not be included in the \$800 duty-free exemption. Nevertheless, this alternative provides for a more hands-free travel experience. Do not let stores confuse you telling you they are tax-free. They may be tax-free within their country, but not tax-free when the package arrives in the U.S.

Tour companies will not assume responsibility for purchases you bought and had shipped from shops their guide may have recommended. It's often more reliable to bring purchases with you.

Restricted Articles

Some articles considered injurious or detrimental to the welfare of the U.S. are prohibited — lottery tickets, narcotics, dangerous drugs, obscene articles and publications, treasonable materials, hazardous articles (fireworks, dangerous toys, toxic or poisonous substances) and switchblade knives.

Also restricted are certain artifacts and cultural property. Particularly of concern are pre-Columbian sculpture and murals without proper export permits, cultural property stolen from museums, religious or secular monuments, and products made from endangered species of wildlife.

Intellectual property is also protected, so pirated copies of copyrighted materials (books, computer programs, cassettes, videos) are no no's. Most fruits and vegetables are prohibited (or require an import permit), as are most meats, plants, cuttings and seeds. Many medications not approved by the FDA are also prohibited.

For further information, contact the nearest U.S. Customs office and request their helpful pamphlet entitled *Know Before You Go*, or see the website, www.customs.ustreas.gov, which includes this pamphlet.



Tour Leaders as En Route Therapists?

Do you or your trip leaders have a degree in psychology? If so, it may come in handy on your next group trip.

More and more leaders are reporting that their skills in handling difficult psychological problems on a trip are being put to the test. As a good tour leader, you know that your duties go far beyond just sitting up front on the coach and lecturing. The best leaders are those who actually



interact with each tour member. I try to rotate and sit with different people, dine with different ones, chat with different ones to give each member on the trip some personal time.

Yet, this personal interaction often brings an outpouring from members, seeing you as more than the trip leader. They may view you as the resident psychologist aboard on whose shoulder they choose to cry. They tell you about unresponsive spouses, failed marriages, financial difficulties, illnesses too numerous to mention, disillusionment with children, and enough sadness to make you cry.

Root of the Problem

Often these outpourings come from people who don't really tell you why they came on this trip in the first place. They may say it's because they always wanted to see such and such a place on the globe. Or they may say they just needed to get away. Or their best friend asked them to accompany her. Or they deserved this trip and needed to be good to themselves.

But they'll seldom tell you it's because they need to make new friends. Or because they couldn't stand their situation at home one more minute. Or because, as one woman told me, she needed time to decide whether to divorce her husband of many years.

I had actually been drawn into that one several weeks before the trip started when I was advised by the bank that her check for final trip payment had bounced. Upon calling the bank, I was told it had not been returned for non-sufficient funds. Rather, a stop payment had been placed against it by her husband who was angry with her for taking the trip. She ultimately made the check good but spent the better part of the tour talking with her new travel companions about this turn of events in her life and ultimately went home to divorce him.

Emotional Incidents

I have had numerous emotionally fraught incidents on trips. In the '70s I was escorting a group to the Rotary International World Convention in Mexico City when I received a call from my home office advising me I had to tell a couple that their son had just been killed in Vietnam. I didn't want to have to tell them. I was sick to my stomach. I walked around the hotel several times trying to summon the courage to do so.

Another time on a brief flight stopover in American Samoa en route to Tahiti, I realized that one of my tour members was missing. Her husband told me she was "out on the runway". As I walked alongside the runway in the blazing sun, I spotted her walking toward me and as she approached I realized she was crying. It turned out her first husband had been killed in a plane crash years before on that exact runway and she wanted to visit the spot where he'd been killed.

One never knows where these emotional incidents are going to pop up. Fortunately, many of them are positive emotional experiences, not negative. I had a beautiful young woman, who had lost a leg early in life, take my entire trip to Rio and Buenos Aires on crutches and prove an inspiration to us all. I recall a daughter who invited her mother to accompany her to France as a present for completing a particularly difficult round of chemotherapy. And I know a magnificent woman in her 90s who runs a large California cattle ranch, who now feels unable to travel with me but who makes sure her daughter and granddaughter take the trips in her stead.



So, you'll never know when these emotional incidents will draw on your heartstrings. Brush up your skills as resident psychologist and be prepared to meet life in all its ups and downs as you continue to lead trips. You will not only help others, but it will give your life more meaning as well.



Escorting in Italy—Dateline Sorrento

Sorrento—long-time resort town that has seen the likes of Goethe, Lord Byron, John Keats and Walter Scott is now home base to me and my band of eighteen tour members as we explore southern Italy on a ten-day autumn tour.

Settling In—Keep Your Cool

I've escaped my group for fifteen minutes to the hotel terrace overlooking the beautiful Bay of Naples, trying to put behind me our chaotic arrival scene. One of my tour members has stood in the lobby and had a tantrum because her single room supplement fee did not get her a room facing the water. She has accused me of "promising her" a single room overlooking the sea. When I pointed out that a single room supplement only guarantees one the privilege of being alone, not of a waterfront location, I swear to myself that, on my next tour, I will surely cover this issue more thoroughly in my pre-trip information bulletins.

I collect myself enough to dress for dinner, only to discover that my suitcase has not arrived; it has gone off in the belly of the coach. However, I had the foresight to bring a complete change of clothes in my carry-on and thus am able to face the group at dinner fresh as a daisy with a big welcome smile.

The Tour Begins

We are now on a whirlwind trip as each day we explore a new facet of this fascinating and historic area. We marvel at the beautifully preserved buildings, at the cars parked three-deep (often on the sidewalk), at the wash drying in the sunshine on the clotheslines high above the streets, and at the never-ending overflowing garbage bins on every block.

Monday is devoted to the ruined Roman cities of Pompeii and Herculaneum. As we walk for hours under the sun through streets trod 2000 years ago by Roman slaves and citizens alike, our beautiful and educated guide, Claudia, helps us relive life in the days when Mount Vesuvius blew its top and buried these cities. After a while, however, the heat, the "rustic" restroom facilities, and no drinking water get to us all and I make a note to myself next time to insist that all tour members carry a water bottle and toilet tissue with them daily.

Tuesday provides us an unforgettable day and the best meal on the trip as we attend a culinary school, learning to make Neapolitan specialties. Tour members help the chef, chopping eggplant, tomatoes, fresh basil, and by making pasta dough from scratch as we gather around round the huge square marble-topped kitchen table. We round out the day by visiting a lemon orchard,



where the owner and his wife proudly invite us into their country home for limoncello samples and a chance to see a family kitchen complete with wood-burning pizza oven. Again, I make a note to always include unusual non-touristy features on a tour—these are what participants most remember.

We’ve all been anticipating the day we do the Amalfi Drive. One of our participants has appeared this morning wearing a tight T-shirt with “Von Bitch” splashed across the front. We all keep our own opinions about her to ourselves as we head out along this winding, cliff-top drive. We walk down the steep paths and steps to the beach below, when it becomes apparent to me that some of our members cannot make the climb back to the top. Again, I pat myself on the back for having the foresight to have costed in a little margin for emergencies and I rent a boat to carry us on to Amalfi.

On our last day, we head into Napoli – noisy, crazy city with its cacophony of horns and motor scooters. I’m terrified I’ll lose some of my slower members trying to cross the streets, but somehow the drivers stop and politely let us cross. Perhaps they know we’re heading for the cool, orderly rooms of the National Archaeological Museum, where we have a reservation to see the ancient murals, mosaics and secret cabinet with its world famous Roman erotica collection.

Reflecting

This latest trip has taught me many things—both new, and things I needed to recall. Most of all it has reminded me how important it is for all of us in the tour business to continue to travel, continue to escort—continue to actually DO it, not just remain at home planning activities, designing trips and briefing tour escorts.



Report from Normandy

We arrived in Paris with a “thump.” One of our tour members fell getting off the escalator/people mover at Charles de Gaulle Airport and each of us, unable to get out of her way fast enough, fell on top of her. Bringing up the rear, I fell on top, my bag on top of me, and two unknown gentlemen behind me flew on top of us all.

By the time someone got the machinery turned off and we untangled and examined ourselves for cuts and bumps, we finally ascertained that only the one on the bottom had sustained any injury. Our guide hustled her off to the nearest doctor and the rest of us settled down to wait with a cup of hot, strong coffee.

When the other half of our group arrived on the Los Angeles/Paris flight, we all reconnoitered with our coach driver and were finally off through the countryside heading north to our destination, Normandy. Our plan was to spend a week there and then wind up with a two-night climax in Paris.



We headquartered in the old town of Trouville, across the bridge from its more swank summer resort sister-city of Deauville. We had selected a small, charming tourist class hotel, Le Fer A Cheval, run by a couple who baked their own breakfast pastries daily and let us take over the cozy library/den for daily briefings. Just two blocks from the “main drag” with its selection of restaurants and cafes, it proved a perfect location.

We were fortunate to have an English guide with a natural empathy for our group of ladies only, impeccable French and a rich background in history. One day she took us to Mont St Michel and though it poured and the climb was daunting, even those who didn’t make it to the top felt it was an unforgettable day.

On To Rouen

Another day we headed for the Norman capital city of Rouen with its history of Joan of Arc, its cobblestone streets and half-timbered buildings, and its elegant shops, which were too expensive when we calculated the euro prices into those of our much-diminished dollar. Fortunately, most of the shops were closed for the long two-hour lunch that still abounds in much of provincial France.

Of course, the most emotional day was our visit to the D-Day landing beaches where, in 1944, the Allied Forces landed and went on to free France from its Nazi occupiers. The rows and rows of white crosses in the cemetery there are forever etched in my brain. We wound up that day with a visit to the 58-panel, handmade Bayeux Tapestry, the account of the invasion of England by William the Conqueror in 1066.

Our excursions also took us to Honfleur with its historic harbor from which the early discoverers and explorers of French Canada sailed in the 16th century. In many of the coastal towns we walked in the steps of Monet and other Impressionist painters.

We also prowled some of the inland country roads for charming ancient villages, handicrafts and rich agriculture. We visited a farm and cheese-maker, spent an hour with an artisan chocolatier, learned about the special Norman art of making copper cooking pots, and had a private demonstration in Alencon, home of French lace-making. Another day we had a cookery demonstration, complete with a hands-on session with a chef who broke us up into three teams cooking our own lunch in an old manor house.

We finally had to say good-bye to Normandy, returning to Paris via Chartres. We brought the trip to a close with a cruise on the Seine and a farewell dinner in Montmartre.

Readers wishing to attempt a similar trip should know that this is not for those with disabilities, unable to walk comfortably or with much heavy luggage. Narrow sidewalks and hilly, cobblestoned streets made it difficult at times. Motorcoaches are not permitted to load and unload luggage or to pull up close to central sites, so trip planners should be cognizant of these limitations.





CHAPTER TEN

And After the Trip is Over

And you thought it was all over when it's over? No way.

Once you bring them home safe and sound, your duties aren't over. Now's when we survey them—what they liked, what they didn't. The highs, the lows. The compliments, the complaints.

Now's when we ask for referrals of friends, family and colleagues for future trips. Now is also when we ask them where they'd like to travel in the future and put them on our mailing list to receive new trip announcements

In short—now is when we make sure we've tied that umbilical cord so it will remain strong for the future.



Welcome Home

Do you ask your trip participants to turn in a post-tour questionnaire telling you what they thought of the trip? You should.

Some trip planners feel that it's a waste of time and that they already know what went right and what went wrong. They may also feel that they don't want to read complaints and often they are just too busy taking care of the next trip on the horizon.

But skipping this opportunity for communication with your travelers could be a mistake. You may find group members' perspectives different from your own evaluation, providing you with valuable information. And, if you were not the tour leader on that trip, but sent one of your helpers, the responses to a questionnaire are even more important.

Post-trip questionnaires provide you with four very important pieces of information: 1) assessment of hotels, airlines, guides and other services which were good and which were not up to par; 2) indication of how successful the tour leader was; 3) an indication of where group members want to travel in the future; and 4) a referral of potential new travelers. And, of course, if something went terribly wrong on the trip, it gives participants an opportunity to vent. In this situation, they may simply want to be heard.

Send it Right Away

I like to mail the questionnaire after they have returned, rather than distributing it on tour. I include a cover letter, explaining that their input is helpful to trip planners and to future travelers who may benefit from their comments. I also enclose an addressed, postage prepaid return envelope to expedite the return of the form. Not all tour members will expend the time and energy to complete such a questionnaire, but many will do so happily.

What questions should you ask? First of all, include questions which are pertinent to the tour operation. What did they enjoy most? Least? Was there a particular hotel which they really loved? Any they would recommend not using again? Did they find the coach clean and the driver cooperative? What about the local guides? Which did they feel were great, and which were just so-so? How would they rate the trip leader? What about the pre-trip information, details on options en route and the service from you and your helpers? Is there anything they would add to the tour, even if it would have increased the tour price?

Now, gather marketing information. Where have they traveled previously? Where would they next like to travel? I ask for "names and addresses of family or friends who might enjoy knowing about our trips" and leave lines for them to list at least three people. (You can then write these referrals and send them a calendar of upcoming trips, plus any membership information.) I do not accept unsigned questionnaires. Each evaluation should have a place for the person's name



and tour identification. I print the questionnaire for each tour on a different color of paper, so it's easy to keep them sorted.

Address Concerns and Problems

When there's bad news...What if tour members are reluctant to say negative things—especially about the tour leader, or you? One way is to have the return envelope stamped “Personal—Attention (and name a person who is an officer of the organization, or a designated volunteer, but not you). People will be more willing to be honest if they know you aren't the one who will be reading their comments.

We all get criticized now and then; it's part of the job. I recall crying one night in my cruise cabin after overhearing one of my group members telling someone that their leader wasn't doing very much for them. I realized I never should have accepted that tour assignment, as I was still recovering from major surgery and didn't have my usual energy level. It obviously showed.

What do you do if you know before mailing the questionnaire that something went wrong on the tour? I usually acknowledge it in my accompanying letter. For example, if the flight home was delayed six hours, you might say, “We all regret the unfortunate delay you encountered on the return flight. We have contacted the airline and asked for a full report from management in this regard.” This can deflect tour members' anger, so that the one incident doesn't color the entire post-tour report.

Don't throw this opportunity away. A welcome home letter and questionnaire can serve as a fact finder, as a vehicle of communication between you and your trip participants, and lastly, as a marketing vehicle. Incorporate it automatically into your list of trip handling procedures. It's a low cost investment that could assure a bright future of other successful trips.



Keeping in Touch

The trip is over. Your group has come back home safe and sound, tired but happy. They've seen new places, learned a lot, had a wonderful time, made new friends, and hopefully just had fun. Wouldn't it be nice if this “high” they're on could be continued? Unfortunately, often it isn't. Quite often they come home and are depressed. They've come home to find bills awaiting them, doctors' appointments on their calendar, and perhaps family problems on the horizon. They've come home to reality. Wouldn't it be nice if your travel program could make it possible for them to maintain that “up” feeling? If it could help them relive the good times? If it might continue the feeling of camaraderie that developed on a trip? And, best of all, if it could mean they would plan to travel with you and your organization trip after trip, year after year? In short, if they would make participating in your travel program a priority in their lives? One of the best ways to make it possible is to continue the connection. Here are some ideas for strengthening that cord.



Relive The Trip With Photos

One of the best ways to evoke memories of good times on a past trip is to look over trip photos. Why not dedicate a special bulletin board as a “Trip Memories” showcase? Your trip leaders and members could be encouraged to take photos on tour. You could collect the best photos from each trip and post them for all to see.

You could even dress up the bulletin board with other memorabilia of the trip—maybe the trip brochure or itinerary. Encourage your photo takers to include lots of trip members in the photos, not just shots of buildings. The idea is to have the exhibit reflect how much fun the trip was. Also, people love to see photos of themselves. Consider also putting them on your web page if you have one or sending them to tour members by e-mail.

Get Folks Together

Past trip reunion get-togethers are a great way to keep the umbilical cord strong between your past travelers and your organization. Getting everyone from a recent trip together helps to cement friendships, relive good times had en route, and provide social continuity and connection.

Write To Them

Your organization should have a newsletter that is mailed periodically to a mailing list of those who have traveled with you in the past and also to those who may have attended functions sponsored by your organization, but never actually traveled with you. Hopefully, a budget for such a periodic newsletter is already in place. If not, now’s the time to start thinking creatively as to how to develop a budget for a newsletter. The newsletter need not be just a travel newsletter, but rather a newsletter covering all the activities and services your organization sponsors. However, you should insist on having at least one page set aside for travel news to promote upcoming trips.

You’ll want to work with your newsletter editor to discuss mail-out dates and deadline dates by which you must have your travel page material submitted for publication.

For short one-day or weekend trips, maybe you’ll announce close-in trips for the next couple of months. For longer trips, particularly major international trips, you’ll need to announce these six to nine months in advance (sometimes even earlier on some very special tours or cruises for which space is in great demand).

Direct Mail

Although one of the most expensive methods of keeping in touch, direct mail is certainly one of the most effective methods. It goes directly to an individual’s home and if properly designed, can prove singularly successful. If your membership or potential trip membership is scattered over a wide area and if this membership does not visit your location on a regular basis, direct mail may be the only method to reach them and make them feel like part of your travel family.

E-Mail Contact

If a number of your members are e-mail savvy, you’ll want to maintain an e-mail list so that you can send them all sorts of goodies via e-mail. It costs virtually nothing other than time and energy.



You could develop a special e-mail newsletter, send advance notice of upcoming trips, or put out “last-call” reminders of space still available on certain trips. The e-mail newsletter could also be a place to send out travel hints, update reports on recently visited destinations, etc. Here’s a chance to be as creative as your imagination allows.

Use People

My mother always taught me it wasn’t nice to use people. But many people like to be used in a positive way. Many past travelers might like to be called on to share some trip memory, experience, or some area of expertise with others.

For example, suppose you had an individual on a trip, like I did, who traveled very light, packing only a small self-wheeled suitcase—yet always looked fashionable and correctly dressed for a variety of occasions on a 10-day tour. Such an individual could be asked to write up her packing hints for you to put in your newsletter or in an e-mail message.

Whatever methods you devise, continuing the connection with your travelers will be worth your while, both in human terms and in the success of your ongoing travel program.



Trip Reunions

If your tour or cruise groups are anything like mine, you’ll often hear comments en route among the members such as “We’ve got to get together when we get home.” Or they may say, “I can hardly wait to see your photos.” Or if your members are not all from one locale, but scattered, they may be saying to one another, “You’ll have to let me know next time you’re coming up so we can have lunch.”

If, indeed, this is the kind of thing you’re hearing, it’s good news. This means they like one another, have developed some sort of an ongoing relationship while on the trip, and would like to see one another again.

In fact, it’s often not the trip itself – the places you go, the things your group does while traveling – that make the trip so successful, although they certainly are important. Rather, it may be the friendships kindled, the new relationships forged, and the interaction among the members that will most be remembered.

And if this is so, it behooves you to nurture this feeling and these relationships, by providing the leadership for a post-trip reunion. Some trip organizers may disagree with me, feeling that the time and energy spent on a trip when it’s over is time and energy wasted.... that when it’s over, it’s over. They may be too busy and want to move on to other priorities waiting for their attention. This can be a mistake.



Post-trip reunions should be incorporated into your planning for two reasons ... one social, one business. The social reason is simply to give the trip participants one more “bang for their buck” one more something related to that trip to enjoy, to savor, to remember. The business reason should be obvious – to tighten that umbilical chord between you and them so that they will not only remember their past trip happily but so that they will be tempted to travel with you again.

What you might like to do is form a small committee of helpers, with you at the helm, but with them assisting. There are a lot of decisions, planning, and small details involved. When is the best time to have it?

Where is a good locale? Would someone in the group like to offer their lovely home, large enough to accommodate the group? If not, do you have a regular meeting place? Another alternative would be to all meet at a specified restaurant for lunch or dinner. Do you want to make it a potluck, a catered function, or simply a wine and cheese or dessert and coffee kind of thing, not focused around a meal?

Do you want to invite just the trip participants? Or do you want to suggest they include other family members or friends? The group dynamics will be slightly different either way. You’ll want to issue written invitations, asking each trip participant to RSVP, indicating how many will be coming in their party.

What kind of program or activities do you want to incorporate? I like to invite each person to bring their three favorite photos to show. I like to go around the room and ask each person to say what they liked best about the trip (this gives you good feedback to help you in planning future trips). You might want to plan some silliness – special hats or T-shirts or wearing something they bought on the trip. You might even want to give every attendee a little take-home remembrance gift (maybe something you bought secretly while on the trip).

Of course, if you have the group’s next trip planned, this would be a fabulous opportunity to announce it. You’d want to have your trip material published and ready to distribute, announcing that they are getting first choice at trip space before you publicize it further.

Don’t let the opportunity of a post-trip reunion slide by. It’s a natural, and it’s there for the asking. Take advantage of the idea.





CHAPTER ELEVEN

In Summation

This isn't really a "chapter." It's a ten-point manifesto for success. If you haven't had time to read anything else in this book, read my "Ten Secrets of Successful Trips" which follows.

Thank you for taking this reading journey with me. Happy Travels!

Marty de Souto

(This chapter has expanded, the above should be re-written after final placement decisions have been decided)



Ten Secrets of Successful Trips

I'm frequently asked, "What's the secret to running a successful trip?" Honestly, the answer is that it's no one thing, but many, and there's nothing secret about it. Here are my ten "top secrets."

1. Your trip plans should begin early enough. For a major U.S. or international tour, that's a year in advance if you're doing all the itinerary design and reservations yourself. If buying a tour from a tour operator, 10-11 months in advance should be sufficient. Short trips like a three day weekend, you can do much closer in.
2. Be sure you've done some market research before you even start to book your trip. Perhaps do a survey in one of your mailings or publications or have this year's trip members vote where they'd most like to go next year.
3. If designing the trip yourself, allow for proper pacing. A crack-of-dawn departure after a late night should be avoided. If you've scheduled a morning and evening activity the same day, give them the afternoon free. Over-tired and eventually sick tour members do not make happy campers.
4. Your trip should be priced on minimum expected numbers, but book for the maximum. For example, you might like to reserve space for 30 participants, but price it on 15 so you can surely operate it if you only have 15 enrollments.
5. Lay out your trip's marketing calendar and budget well in advance. Write on your calendar dates for brochure release (usually nine months in advance of tour departure) and dates for your direct mail campaign, press releases to the local media, promotional evening, any paid ads, etc. If designing and costing the trip yourself, these marketing costs need to be priced into the tour before you publish the trip price. If you're buying the trip "off the shelf" from a tour operator or cruise line, and therefore can't modify their published price, you'll need to negotiate hard and heavy for some promotional assistance funding from your supplier or simply have to settle for less profit to accommodate these marketing expenses.
6. Before accepting the final offer from your supplier(s), go over every little detail to be sure there are no misunderstandings. How many twins and single rooms do you hold? Are all the hotels listed actually confirmed, or are those just "suggested" hotels? Are entrance fees and tips to step-on guides included when sightseeing? What about other tips to waiters, tour manager, bus driver, porters, hotel bellmen in and out of rooms, etc. Be specific!
7. When costing, throw in a small fee to allow for misunderstandings—a gratuity you forgot, an en route nicety you omitted, a change in currency exchange rates that may happen between now and departure date, etc.



8. Be sure you have a dynamite tour leader at the helm. This might be a volunteer, a “pro” whom you hire, a Pied Piper who brought in the client bookings, or it might even be YOU. But whoever it is, it must be someone with leadership skills.

9. As participants book, keep in touch with them in the intervening time until departure. Never take them for granted; they can always cancel! Be sure their final payments come in on time.

10. Most importantly, work only with well-known, reputable operators. It’s more important to have a truly professional and honorable supplier behind you than to look for the cheapest deal around. Work with suppliers who have the financial stability, experience, and in-the-field know-how to help you and your travelers in case of an emergency.

These are my “Magic Ten.” You may have additional ones—if so, let us know. We can all learn from each other.



Appendix:

Online Resources for Group Travel Planners

Destination Articles – Future Trip Ideas, Domestic and International:

<http://leisuregrouptravel.com/the-magazine/>

Directory of Group-Friendly Suppliers: www.grouptraveldirectory.com

Bus Charter Information and Quotes: www.busrates.com

Group Hotel Rates: <http://grouptravel.hotelplanner.com>

Travel Insurance: <http://www.ourtravelprotector.com>

Weather Forecasting Tool (great for advance planning):

<http://www.wunderground.com/tripplanner/index.asp>

Seminars in Print, CD's and other Resources on Group Travel:

www.groupuniversity.com

Create Your Own Website Tool: <http://www.go-ontheweb.com/>

Currency Conversions: <http://www.oanda.com/convert/cheatsheet>

Flight Status Check: <http://www.flightarrivals.com/cgi-bin/WebObjects/Flights>

Group Travel E-Newsletter: <http://leisuregrouptravel.com/insite-e-magazine/>

Niche Market Resources:

Student Travel: <http://insite.studenttraveldirectory.com>

Sports Events <http://insite.sportsdirectory.org>

Religious Travel: <http://insite.religioustraveldirectory.com>

Reunions: <http://insite.reuniontraveldirectory.com>

Ski Trips: <http://www.skigrouptrips.com>

