

# The potential of nature tourism in the Baltics – view of a large European tour operator

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# TUI Group: Key figures financial year 2009/10



## TUI Group

Turnover:	€ 16.35 billion
Operating income:	€589 million*
Employees worldwide:	approx. 71.400**

\* underlying EBITA

\*\* of which Corporate Center: approx. 180 employees

# Group structure



# TUI Travel



# TUI Travel – overview



- Market leader in Europe
- More than 30 million customers from over 27 source markets
- Pan-European airline with more than 140 aircraft
- Approx. 3,500 retail shops in continental Europe, the UK & Ireland
- Approx. 50,000 employees

# TUI Travel – overview



## Mainstream

- Central & Western Europe, Northern Region
- Classic tour operator business
- 143 aircraft, 3,500 retail shops
- Market leadership



## Specialist & Activity

- World's largest provider of specialist and experiential travel
- Over 100 brands
- Delivering range of unique experiences



## Emerging Markets

- Growing portfolio of travel businesses
- Specific source markets: Russia & CIS, Brazil, India and China



## Accommodation & Destinations

- 29 wholly owned brands with 12.5m offline customers and 16.8m room nights sold
- Cruise handling market leaders
- Only A&D service provider with a global reach

# TUI Travel – Mainstream Sektor Market-leader across Europe

UK:  
#1 [47%]\*

Netherlands :  
#1 [20%]\*

Belgium :  
#1 [45%]\*

France :  
#1 [25%]\*

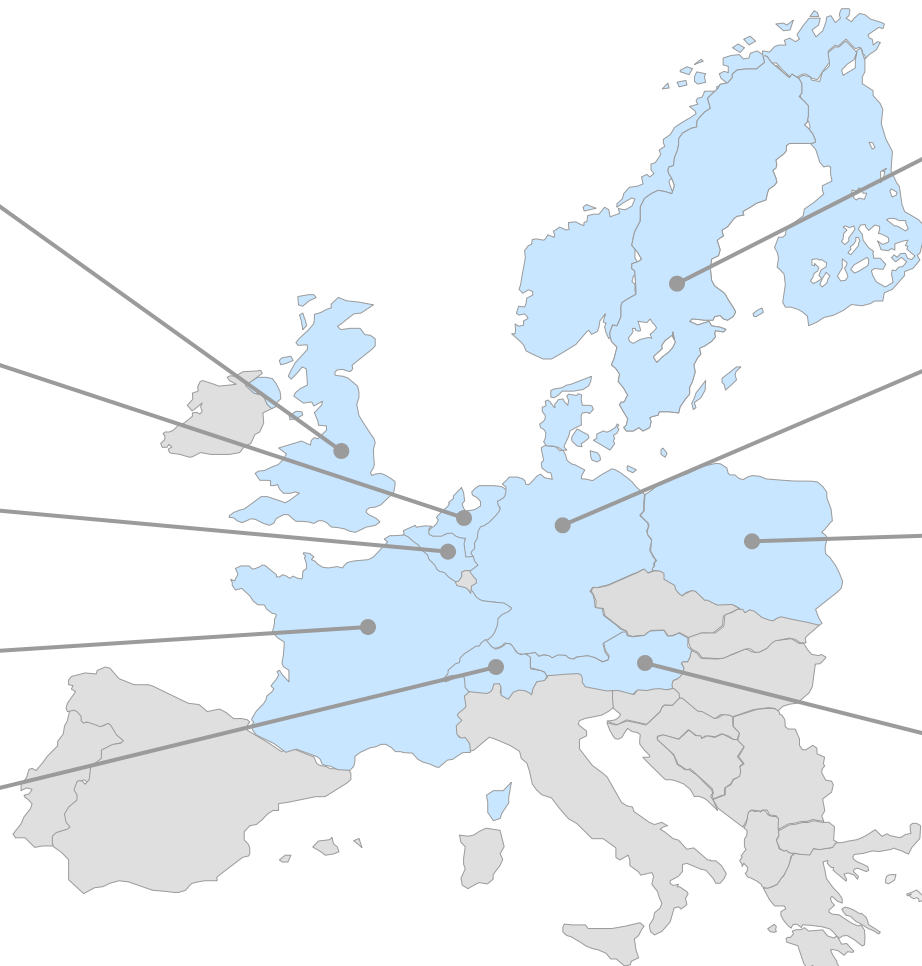
Switzerland :  
#3 [15%]\*

Nordic :  
#2 [27%]\*

Germany :  
#1 [29%]\*

Poland :  
#3 [9%]\*

Austria :  
#1 [37%]\*



\* Market share in %

# TUI HOTELS & RESORTS



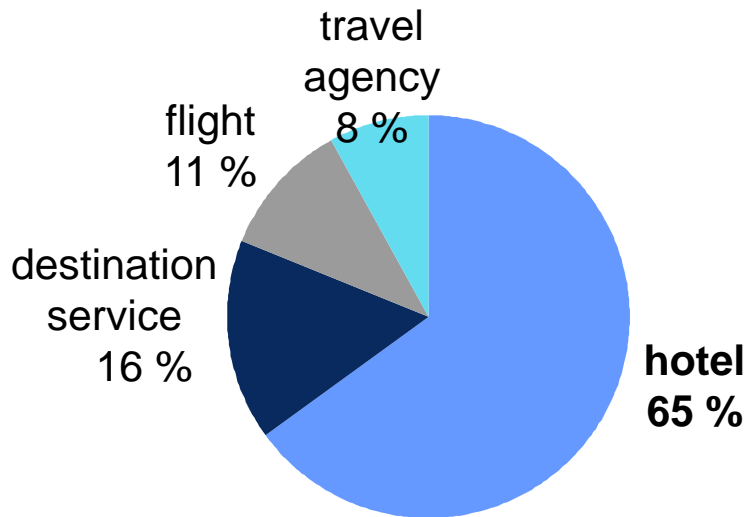
# TUI Hotels & Resorts – at a glance



- No 1 leisure hotelier in Europe with around 261 hotels and approximately 170,000 beds in 27 countries
- Most hotel companies with local partners
- Focus on four star category (about 60%)
- High occupancy rates (75%) as there is access to the customers and direct distribution of TUI Travel
- Selective organic growth

# Group owned hotel products – Key to success

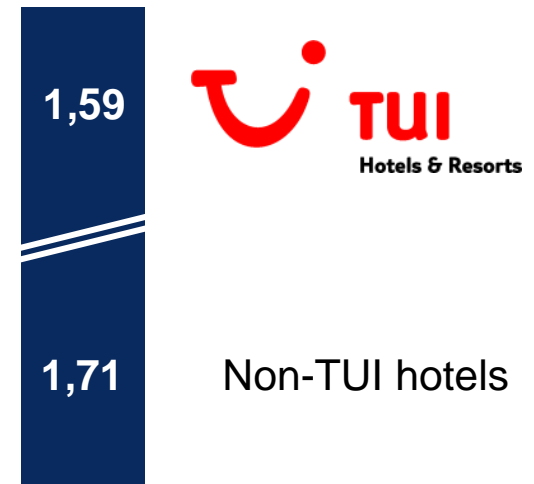
## Factors affecting customers satisfaction



## Customer satisfaction with hotels

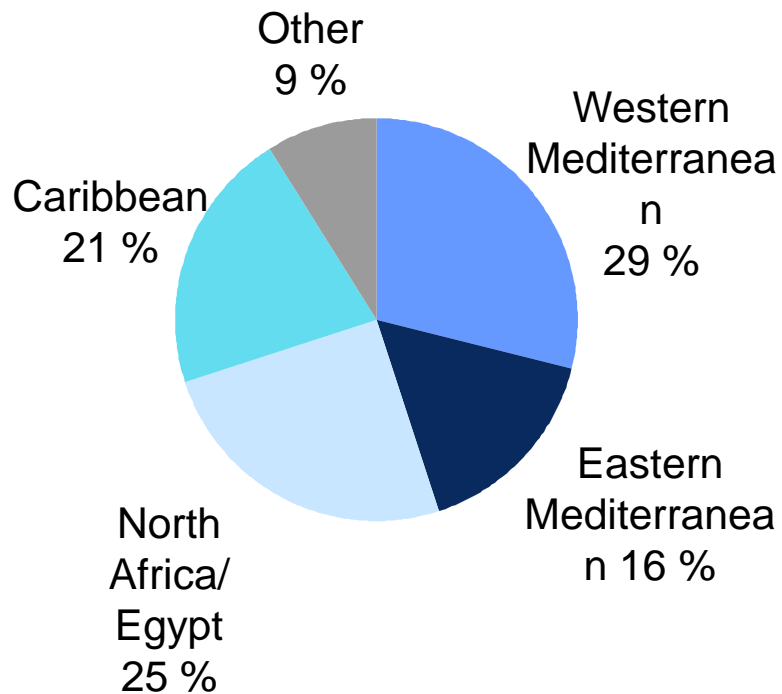
Example source market Germany

Ø Average grade

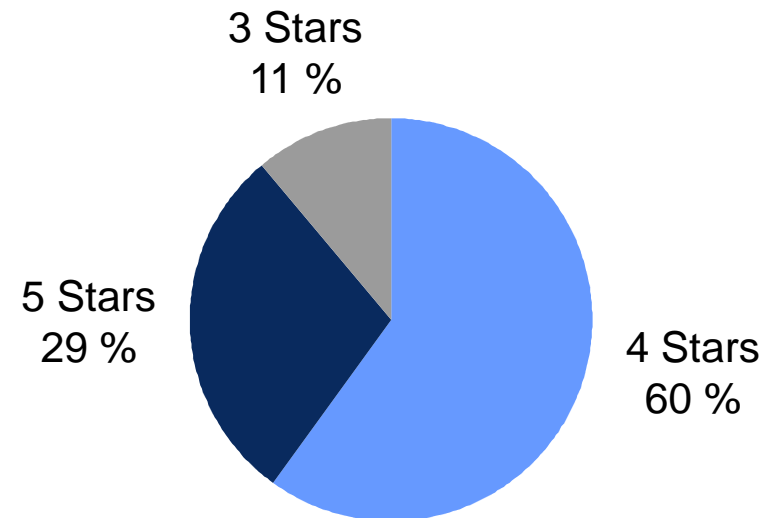


# TUI Hotels & Resorts – the facts and the brands

## Group-controlled hotel beds by region



## 261 hotels by categories



# TUI Hotels & Resorts

## The EcoResort seal of quality



- Without environmental quality there can be no holiday quality and no customer satisfaction
- Innovative environmental management is a significant part of TUI Hotels & Resorts' quality strategy
- The Group's internal "EcoResort" seal of quality honours those hotels and clubs in the TUI Hotels & Resorts portfolio which satisfy the agreed sustainability criteria
- The environmental management systems of the "EcoResorts" are audited by independent specialists and certified in accordance with a recognised national or international environmental standard, such as ISO 14001



# CRUISES

# Hapag-Lloyd Kreuzfahrten

**Leading provider of premium, luxury and expedition cruises in the German-speaking region.**



- The EUROPA, the fleet's flagship, sets international standards. It is the only cruise liner to have been awarded the coveted 5-stars-plus distinction by the Berlitz Cruises Guide for the eleventh consecutive time.



- Expansion from 2013: 2-year-charter of "COLUMBUS 2"
- Expansion from 2013: 12-year-charter of "EUROPA 2"



**TUI Cruises is a joint venture (50/50) between TUI AG and the American shipping company Royal Caribbean Cruises**

- Company aims at the premium volume segment of the market
- Company founded in spring 2008
- Christening of the first ship “**Mein Schiff**” and first cruise in May 2009
- Commissioning of second ship “**Mein Schiff 2**” in May 2011

# SUSTAINABLE DEVELOPMENT



# Sustainable development

We are committed to economic, ecological and social development in all our business locations as well as in the tourist destinations we operate in.



Companies committed to diversity, fairness and mutual respect



## Employees:

For instance the diversity charter: diversity management within the Group

## Environment :

For instance a framework agreement with ministry of the environment of the Balearic Islands: climate protection and preservation of biodiversity

## Society:

For instance Futouris: sustainability association for supporting international projects in the community development sector

## Education, culture & science

For instance TUI Foundation with youth integration award

# Sustainable development Included in many sustainability indices



www.tui-nachhaltigkeit.com

## International rating agencies and sustainability analysts confirm that TUI delivers a convincing sustainability performance

TUI is represented in the leading sustainability indices:

- Dow Jones Sustainability Index (DJSI)
- FTSE4Good
- ASPI Eurozone
- Ethibel Ethibel Excellence
- ECPI Ethical Index Euro
- Oekom Research Investment Status „Prime“



# TUI in the Baltic States



# German TUI Companies active in the Baltic States

- Tour Operator (Tui Deutschland)  
*(Offering coach tours, featuring app. 50 Hotels, Self-drive tours, Week-end /short break trips Rent-a-car arrangements)*
- Study Tours ( Gedeco / Dr.Tigges)  
*(high quality guided tours)*
- TUI Cruises  
*(regular summer season calls of TUI Cruise Ships in key Baltic ports)*



# Itinerary of TUI *Mein Schiff 2*, 2011



■ *Mein Schiff 2* **Dauer:** 10 Nächte

**Route:** Kiel (Deutschland), Schiffstag, Stockholm (Schweden), Helsinki (Finnland), St. Petersburg (Russland), St. Petersburg (Russland), Tallinn (Estland), Riga (Lettland), Gdingen/Danzig (Polen), Schiffstag, Kiel (Deutschland)

# Product Demand from TUI's German Customers



- Three country trips
- City trips
- Culture and Heritage tours
- Special tours (e.g. Estonian Island tour  
Greathouse tours)

# Criteria for selecting „Baltic Holidays“

	% *
■ Culture	55
■ Nature	35
■ Heritage	28
■ Wellness	9
■ Combination /other	56

*\* multiple answers were possible*

# Satisfaction with „Baltic Holidays“

	%
■ Very satisfied	22
■ satisfied	43
■ Adequate	26
■ Not satisfied	9



- Build on exiting strength
- Improve quality of product/travel
- Promote more thematic tours
- Target special groups (e.g. Golden ager's)

# What is TUI is doing regarding Nature Tourism



...Targeting ***product development*** towards ***sustainability***.

Examples:

- TUI developed ***a souvenir guidebook*** and other related publications.
- By the "***Volunteering***" travel offering from i-to-i Travel customers can combine travel experience with voluntary social commitment.
- In cooperation with the **Global Nature Fund (GNF)** a **environmental excursion** are planned.
- The British tour operator First Choice published for the first time in 2009 its "**greener Holidays**" brochure.

# Thank you for your attention

