



4TH SUMMIT of TRAVEL AGENCIES ASSOCIATIONS
Valencia · 1-3 November 2017

Worldwide Travel Agencies: Market Trends

The Global Shape of the Agency Market



The Global Shape of the Agency Market

Speaker & Chairperson:

Mr. Mark Meader Senior Vice President – ASTA (American Society of Travel Agents)

Panelists:

Mrs. Paula Cortés Calle Past President – FOLATUR (Foro Latinoamericano de Turismo)

Mrs. Merike Hallik President – ECTAA (The European Travel Agents' and Tour Operators' Associations)

Mr. Hamzah Rahmat President – FATA (The Federation of Asean Travel Agencies)

Mr. Nicanor Sabula Chief Executive Officer – KATA (Kenya Association of Travel Agents)

Mr. Jayson Westbury Chief Executive – AFTA (Australian Federation of Travel Agents)



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The Global Shape of the Agency Market

Unique by Market or Globally Shared Value?

The Landscape: from the Americas, to Australasia and Asia, to Europe and Africa

- **Corporate vs. Leisure**
- **Online vs. Offline/Traditional**

The Local Consumer's View of the Travel Agent

- **Niche Market Specialists vs. Generalists**
- **The Social Media Play**
- **New Technologies**

U.S.
28/72

Latin America
40/60

Europe
60/40

**Travel Agent
Sales**

**LEISURE
VS.**

CORPORATE

Asia Pacific
60/40

ASEAN
60/40

Africa
25/75

 **Leisure**  **Corporate**

U.S.
31/69

Latin America
30/70

Europe
47/53

**ONLINE
(OTA)
VS.
TRADITIONAL
AGENT**

Asia Pacific
65/35

ASEAN
61/39

Africa
30/70

■ Online ■ Agent

U.S.
51/49

Latin America
50/50

Europe
60/40



AIR

**AGENT
VS.**

**AIRLINE
DIRECT**

Asia Pacific
70/30

ASEAN
50/50

Africa
60/40

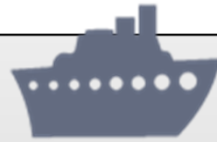
■ Agent ■ Airline Direct



U.S.
70/30

Latin America
90/10

Europe
90/10



CRUISE

AGENT

VS.

NON-AGENT

OR

DIRECT

Asia Pacific
85/15

ASEAN
90/10

Africa
90/10*

■ Agent ■ Non-Agent or Direct



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U.S.
70/30

Latin America
95/05

Europe
90/10



TOURS

AGENT

VS.

DIRECT

Asia Pacific
90/10

ASEAN
90/10

Africa
80/20

■ Agent ■ Direct

U.S.
29/71

Latin America
60/40

Europe
45/55



HOTEL

AGENT

VS.

DIRECT

Asia Pacific
15/85

ASEAN
54/46

Africa
40/60

■ Agent ■ Direct

It's A Volatile World

- **From Ebola to Zika to...?**
 - The Threat from Disease
- **The Threat of Terrorism**
 - Real and Ever-present
- **Geopolitical Change**
 - Brexit; Other Administration Changes
- **Natural Disasters Remain Equally Unpredictable**
 - Hurricanes
 - Earthquake in Mexico City
 - Fires in Western U.S. and Canada
- **The Agent's Role Around the Globe**
 - Duty of Care
 - Liability





Regulatory Impacts

Do Regulations Constrain or Enable?

- Global
- Country Specific
- Local

Top Regulatory Issues Geographically

- North America
- Latin America
- Europe
- Australasia and Asia Proper
- Africa





It's An Evolving Sometimes Disruptive Agency World...

**But Change Leads to Innovation and Innovation Builds
Success Today and for our Future Globally!**



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YOUR QUESTIONS

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