

The Importance of the Travel Agent in the New Developing Environment of Global Tourism

Noel Josephides

Chairman ABTA – The Travel Association



Sunvil Holidays

GIC The Villa Collection

Expert Africa

Planet Holidays

ABTA – The Travel Association

The Travel Foundation

AITO – Association of Independent Tour Operators

AGTA – Association of Greek Travel Agents



The Old Order

In 1998

ABTA Travel Agents 6942

Top 5

Lunn Poly – 792 shops

Going Places – 708 shops

Thomas Cook – 384 shops

Carleson World Choice – 411 shops

Co-op – 248 shops



In 2005

- 877 Agent Member Head Offices with 4,738 Branches
- Total Outlets 5615

In 2015

- 380 Agent Member Head Offices with 3,039 Branches
- Total Outlets 3419

57% Reduction in Businesses

39% Reduction in Physical Branch Locations



The New Order



Expedia (2014)

\$5.76 Billion Revenue
18,000 Employees

Priceline (2014)

\$8.44 Billion Revenue
12,700 Employees

Trip Advisor (2014)

\$1.24 Billion Revenue
2793 Employees

Airbnb

\$500 Million
Unknown Employees

Source: Companies' own data



Expedia Owns:

Hotels.com

CarRentals.com

Egencia

Classic Vacations

Hotwire

Expedia Cruise Ship

Centres

Trivago

Orbitz Worldwide

Venere.com

Homeaway

Wotif Group

(Australia/New Zealand)



Priceline Owns:

Booking.com

Kayak

Agoda.com

Rentalcars.com

Restaurant Reservations



TripAdvisor Owns:

Airfare Watchdog

Booking Buddy

Cruise Critic

Family Vacation Critic

Flipket

Coate Guru

Holiday Lettings

Niumbra

Tingo

Travelpod

Holidaywatchdog

Independent Travellers

Viator

VirtualTourist

Seatguru

Jetsetter

Lafourchette

OneTime

Smarter Travel



TUI:

UK: 57% Online Distribution

Germany: 14% Online Distribution

Direct Sales UK: 89%

Direct Sales Germany: 43%

Margin UK: 7.9%

Margin Germany: 2%

Source: Annual Report



GOOGLE



Internet Penetration – 2014

UK	89.9
Germany	86.03
France	85.75
Italy	59.92
Belgium	84.72
Sweden	89.10
Russia	61.40
Greece	57.85
Turkey	46.20

Source: Live Stats



How to Survive?

1. Groups
2. Special Interest/Niche
3. Value Added
4. Superlative Service – Go That Extra Mile
5. Can you trust Hoteliers?
6. Avoid dealing with large Companies – or rather don't rely on them
7. Don't be arrogant or greedy – Travel is an uncertain world
8. Create your small monopoly: Virgin/New Market



And what can HATTA do for you?

1. Make the HATTA Badge mean something
2. Fight for your Members
3. Financial Protection 
4. Platform for Interchange of Views

