

# ASTA Agency Profile

Member Demographics  
February 2011



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## Year Agency Established in Business

The average ASTA agency was established in 1986. The oldest agency in the survey was established in 1910 and the newest was established in 2010.

	2009	2010	2011
1970 and earlier	15%	15%	14%
1971 - 1980	19%	19%	18%
1981- 1990	28%	27%	28%
1991 - 2000	22%	21%	23%
2001 - present	16%	17%	17%

## Number of Employees and Independent Contractors

86 percent of ASTA agencies have employees and/or ICs. The remaining 14 percent are one-person agencies.



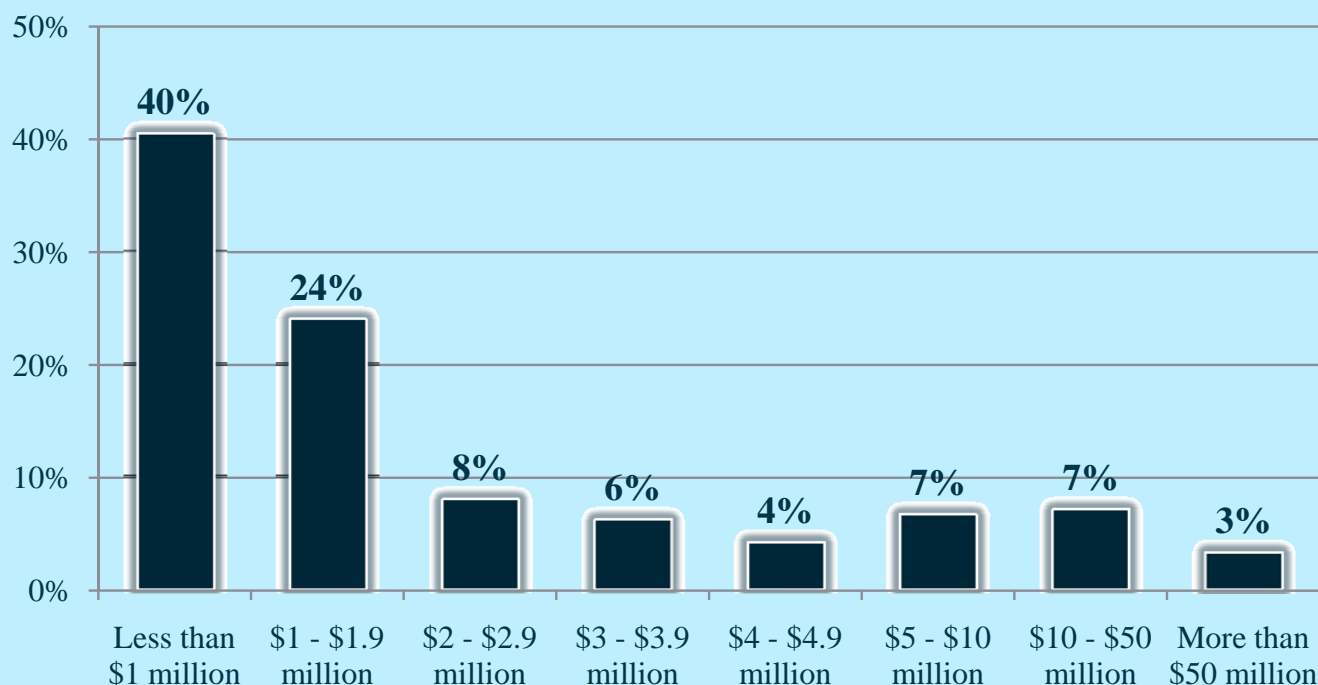
More information on agency employees and IC's can be found in [ASTA's Labor & Compensation](#) report including salaries, benefits, and compensation mixes

The average number of full-time employees is 9, the average number of part-time employees is 5, and the average number of Independent Contractors (ICs) is 11.

	Full-time Employees	Part-time Employees	Independent Contractors
Mean (average)	9	5	11
Median	2	2	3
Mode	1	1	1

## 2011 Sales Volume

More than a third of respondents indicated an annual sales volume of less than \$1 million while almost a quarter of agencies (24%) reported an annual sales volume of \$1 million to \$1.9 million in 2011. The categories with the least amount of representations are the \$4 - \$4.9 million and More than \$50 million.



In recent years, there has been an increase in the number of agencies with sales of less than \$1 million and sales of more than \$10 million. The agencies in the middle ranges of sales have not fared as well.

	2002 % Share	2003 % Share	2005 % Share	2006 % Share	2007 % Share	2008 % Share	2009 % Share	2010 % Share	10/02 % Change
Less than \$1 million	21%	22%	23%	24%	35%	35%	39%	40%	93%
\$1 - \$1.9 million	30%	29%	31%	29%	25%	25%	23%	24%	-21%
\$2 - \$2.9 million	18%	20%	15%	13%	13%	12%	8%	8%	-56%
\$3 - \$3.9 million	11%	8%	8%	9%	5%	5%	6%	6%	-41%
\$4 - \$4.9 million	7%	7%	6%	6%	7%	4%	3%	4%	-42%
\$5 - \$10 million	8%	11%	9%	10%	7%	8%	11%	7%	-21%
\$10 - \$50 million	4%	4%	7%	9%	8%	9%	9%	7%	150%
3%									
More than \$50 million									

## Average Sales Mix

Between 2002 and 2011, the percentage share of air sales dropped 23 percent. Car rental also saw a large decrease in percentage share during the same time period. In contrast, hotels, cruises and tours all saw strong increases in percentage share.

	2002 % Share	2003 % Share	2005 % Share	2006 % Share	2007 % Share	2008 % Share	2009 % Share	2010P % Share	2011P % Share	11/02 % Change
Tour/ Packages	27%	29%	30%	30%	31%	37%	35%	29%	31%	13%
Airline	34%	32%	29%	27%	26%	24%	24%	28%	26%	-23%
Cruise	22%	22%	24%	24%	25%	20%	25%	25%	26%	18%
Hotel	8%	9%	9%	8%	10%	13%	9%	10%	10%	24%
Car rental	5%	5%	5%	4%	4%	3%	4%	4%	4%	-24%
Other	4%	4%	4%	7%	4%	3%	4%	3%	3%	-17%

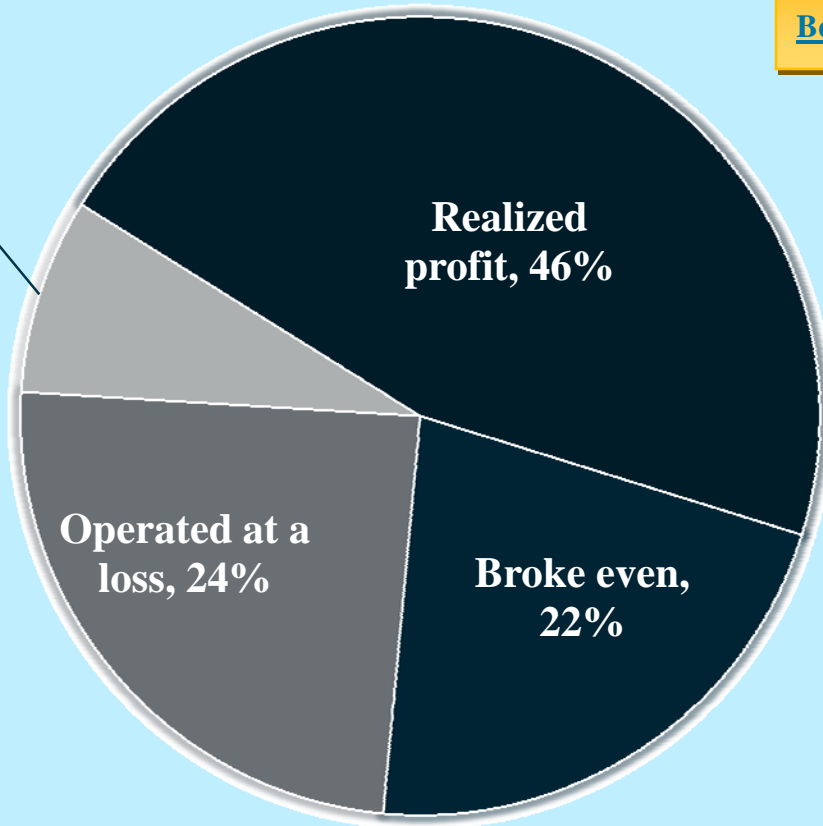
Note: \*2010 sales by segment data is revised from last years projections, 2011 sales by segment data is projected.

## Agency's Net Profit Result

Almost half of ASTA agencies realized a profit in 2010.

More information on agency profitability can be found in [ASTA's Financial Benchmarking](#) report.

**Don't know yet/ Unsure, 8%**



The number of agencies that made a profit or broke even is much larger for 2010. This is related to the improving economy in 2010.

	2007 % Share	2008 % Share	2009 % Share	2010 % Share
<b>Realized profit</b>	53%	39%	34%	46%
<b>Broke even</b>	20%	19%	18%	22%
<b>Operated at a loss</b>	16%	33%	40%	24%
<b>Don't know yet / Unsure</b>	11%	9%	9%	8%

## Domestic vs. International Sales

The percentage share of international sales has increased over the last six years and beginning in 2010 agencies now expect international sales to be a larger percentage of sales.

	2004 % Share	2005 % Share	2006 % Share	2007 % Share	2008 % Share	2009 % Share	2010 % Share	2011P % Share
<b>Domestic Sales</b>	60%	57%	55%	51%	50%	50%	45%	45%
<b>International Sales</b>	40%	43%	45%	49%	50%	50%	55%	55%

Note: 2011 data is projected.

## Leisure vs. Corporate Orientation

ASTA agencies report that leisure products make up an average of 78 percent of total sales and corporate sales make up the remaining 22 percent of sales. The ratio has shifted very little.

	2004 % Share	2005 % Share	2006 % Share	2007 % Share	2008 % Share	2009 % Share	2010 % Share	2011P % Share
<b>Leisure</b>	76%	76%	76%	77%	76%	76%	78%	78%
<b>Business</b>	24%	25%	24%	24%	24%	24%	22%	22%

Note: 2011 data is projected.

## Consortia/Franchises Membership

For the first time in over a decade, the percentage of agencies with a membership in a consortium or franchise dropped below 80 percent in 2010. That percentage has rebounded to 82% in 2011. The quick resurgence in consortia membership may be another sign of an economic recovery.

Year	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
<b>% Consortia Member</b>	86%	84%	85%	85%	84%	85%	85%	81%	81%	78%	82%

## Top Nine Consortia/Franchises Member

Of the top nine Consortia/Franchises, Vacation.com has the largest percentage share of memberships.

	2006 % Share	2007 % Share	2008 % Share	2009 % Share	2010 % Share	2011 % Share
Vacation.com	36%	34%	26%	27%	25%	28%
Travelsavers	10%	12%	8%	10%	10%	10%
TravelLeaders	10%	9%	9%	9%	8%	7%
Results! Travel	3%	5%	6%	7%	7%	7%
Ensemble	6%	6%	6%	5%	6%	5%
Signature	na	na	na	2%	3%	4%
Virtuoso	3%	3%	3%	3%	4%	4%
Westa	na	na	3%	2%	3%	4%
American Express	3%	4%	4%	5%	4%	3%

## Industry Identification Number Used

67 percent of ASTA agencies use an ARC identification number. IATA TSI and CLIA identification numbers were the next two most cited numbers with 65 percent and 47 percent, respectively. Only 4 percent have taken advantage of ARC's new VTC option.

	2008 % Share	2009 % Share	2010 % Share	2011 % Share	%Change 08/11
ARC	71%	73%	70%	67%	0%
ARC-VTC	na	na	4%	4%	
IATAN/TSI	68%	69%	67%	65%	-4%
CLIA	56%	53%	50%	47%	-16%
TRUE	4%	3%	3%	4%	4%
Do not have one	2%	2%	2%	3%	38%
Other	4%	10%	5%	3%	-39%

## Legal Status

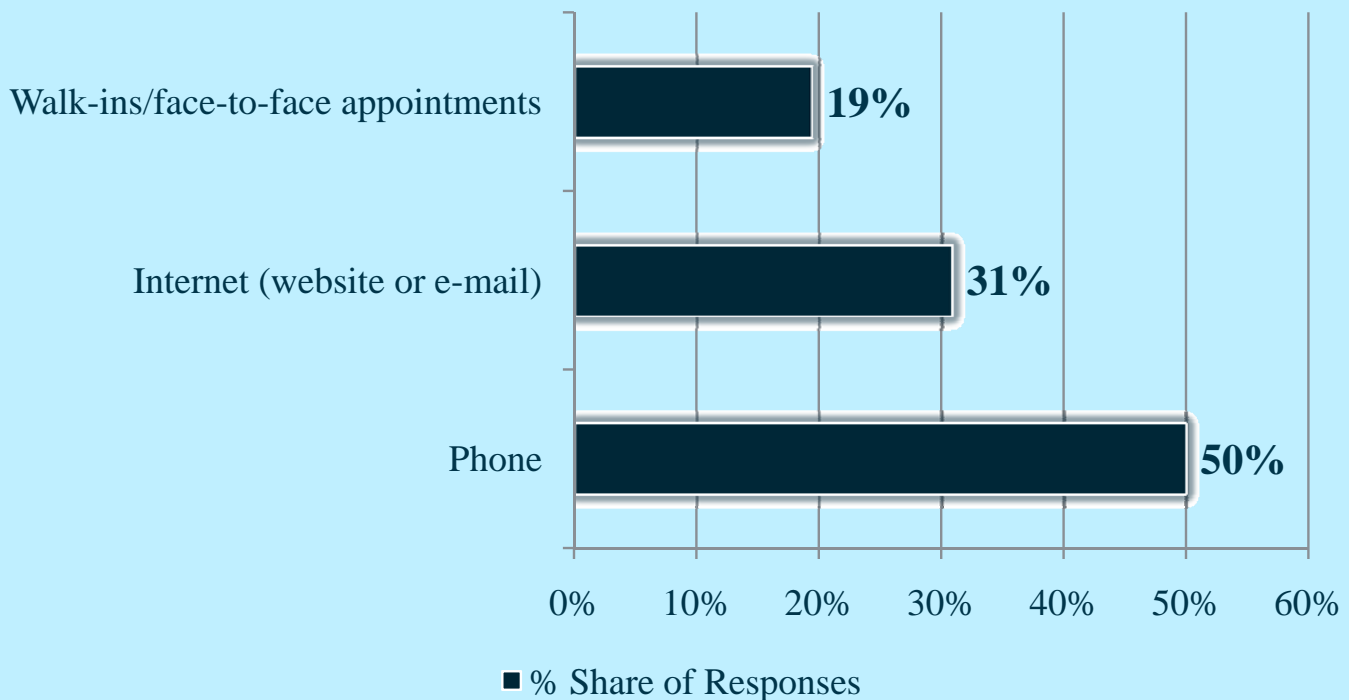
The percentage share for corporations has declined.

	2006 % Share	2007 % Share	2008 % Share	2009 % Share	2010 % Share	2011 % Share	%Change 06/11
Corporation other than Subchapter S	39%	38%	34%	34%	34%	32%	-17%
Subchapter S	36%	32%	32%	31%	28%	30%	-17%
Sole proprietorship	14%	10%	17%	18%	18%	18%	27%
Limited Liability Company (LLC)	7%	16%	12%	11%	13%	12%	87%
Partnership	3%	2%	3%	2%	3%	2%	-16%
Don't know/Not Sure	2%	2%	2%	2%	2%	2%	0%
Other	na	na	1%	4%	2%	3%	na

\* Includes the answers: C-corporation, Corporation, Inc, Incorporated and California corporation

## Conducting Business – Communications

Half of business communications with clients is conducted by phone. A fifth of business communications is still done face-to-face.



The trend clearly shows the percentage of phone communications has declined in favor of internet communications. Walk-ins/face-to-face appointments have barely changed.

	2003 % Share	2004 % Share	2005 % Share	2006 % Share	2007 % Share	2008 % Share	2009 % Share	2010 % Share	2011 % Share	%Change 03/11
<b>Phone</b>	72%	72%	72%	70%	66%	59%	53%	52%	50%	-30%
<b>Internet (website or e-mail)</b>	9%	9%	9%	12%	17%	23%	32%	28%	31%	246%
<b>Walk-ins/face-to- face appointments</b>	20%	20%	20%	19%	18%	18%	16%	20%	19%	-1%

## Agency Location & Business Model

The largest percentage of agencies is still in retail location with multiple employees. Many brick & mortar agencies have at least some of their employees telecommuting, especially when they have chosen to consolidate retail locations.

	2010	2011
<b>Home-based agency with one employee (yourself)</b>	11%	15%
<b>Home-based agency with more than one employee</b>	16%	13%
<b>Independent Agent with host agency affiliation</b>	3%	4%
<b>One Retail Location (open to walk-ins) with one employee (yourself)</b>	5%	6%
<b>One Retail Location (open to walk-ins) with more than one employee</b>	41%	37%
<b>One Office Location with one employee (yourself)</b>	1%	2%
<b>One Office Location with more than one employee</b>	10%	9%
<b>Multi-locations</b>	11%	10%
<b>Other</b>	2%	4%

More information on independent agents and home-based agencies can be found in the [Independent Agent](#) report.

Comparing 2003 with 2011, the percentage of home-based agencies grew by 328 percent. Overall, retail locations have seen a larger drop than office locations suggesting that those with an office location have not bought into the telecommuting option.

	2003 % Share	2004 % Share	2005 % Share	2006 % Share	2007 % Share	2008 % Share	2009 % Share	2010 % Share	2011 % Share	%Change 03/11
<b>Home-based Agency</b>	7%	9%	12%	14%	18%	29%	30%	30%	31%	328%
<b>Retail Location Agency</b>	63%	61%	60%	58%	55%	44%	45%	46%	43%	-31%
<b>Office Location Agency</b>	23%	25%	24%	26%	25%	25%	23%	22%	21%	-9%
<b>Other</b>	6%	5%	4%	2%	2%	2%	2%	2%	4%	-34%

## Years of ASTA membership

The average agency has been a member since 1992. The agency that has been a member the longest number of years joined ASTA in 1932. Agencies that joined ASTA after 2001 represent the largest share of respondents.

	2009	2010	2010
<b>1970 and earlier</b>	8%	6%	7%
<b>1971 - 1980</b>	12%	12%	13%
<b>1981- 1990</b>	27%	26%	25%
<b>1991 - 2000</b>	23%	23%	22%
<b>2001 - present</b>	29%	33%	32%

## Responding Member Age

The largest percentage of respondents fell in the 55-64 years old category followed by the 45-54 years category. Most respondents are managers, agency owners or agency CEOs, therefore the average is skewed upward compared to the general travel agent population.

	2004 % Share	2005 % Share	2006 % Share	2007 % Share	2008 % Share	2009 % Share	2010 % Share	2011 % Share
18-34	2%	2%	2%	3%	3%	3%	3%	3%
35-44	12%	11%	10%	13%	13%	9%	11%	9%
45-54	34%	32%	30%	26%	26%	27%	25%	23%
55-64	35%	39%	40%	39%	39%	40%	36%	38%
65 and older	17%	16%	19%	19%	19%	21%	26%	27%

## SURVEY BACKGROUND

Survey data was collected through the 2011 ASTA Research Family. The ASTA Research Family is comprised of a representative sample of ASTA member travel agency owners and managers. The Research Family reflects ASTA members in key agency demographics including sales volume, leisure/business mix, number of part-time and full-time employees and geographic location. Members were recruited randomly and were contracted to complete a survey every five to six weeks from January 2011 through October 2011. The Family's size varies from survey to survey due to non-response, agency closings, mergers, and changes in membership status, but is designed to yield a response representative of all ASTA agency members.

The survey data was collected online via surveygizmo.com in January 2011. Of the 471 family members, 441 completed the survey. This reply level indicates a minimum of 95% confidence with an error rate +/-4.3% representing the total ASTA agency membership. This is considered to be a strong sample with reliable results.

Please note: All tables and data in this report are sourced directly from ASTA's Agency Profile survey unless otherwise indicated.

Contact Melissa Teates, Director of Research at ASTA, at [mteates@asta.org](mailto:mteates@asta.org) if you have any questions.

*This profile is available for download free on [ASTA's Research Page](#).*



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## Travel Agency Benchmarking Series:

**ASTA Agency Profile** - Demographics of ASTA members including sales and type of agents.

**Corporate Agency Report** – Overview of typical contract types, fees, and online tools.

**Financial Benchmarking Report** - Benchmarking data on sales, revenue sources, revenue by type of travel, and operational expenses are the focus of this report.

**GDS Report** - Trends on GDS usage, contract lengths, contract negotiations, and incentives/penalties are covered. Also, includes information on non-GDS users.

**Labor and Compensation Report** - Detailed data on compensation by region and agency size and type. Benefits offered, turnover rates, and hiring practices are also included in this report.

**Leisure Agency Trends** - Changes in business model agencies have made or plan to make in the future. Sales performance and employment/IC issues are covered.

**Marketing & Customer Retention Report** - Marketing practices and client relationships are analyzed in this report. Topics included are lead generation and client turn-over.

**Service Fee Report** - Includes survey data on average service fees by travel type, service fee policies, service fee collections and service fee revenue. Consulting fees are also covered.

**Supplier-Travel Agent Relationship Marketing Report** - Preferred supplier relationships, booking channels used, and effectiveness of incentive programs are analyzed.

**Technology and Web Usage Report** - The business practices of agencies related to internet usage, technology usage, agency Web site, and online booking are covered.

## Other Research Available:

**2009 Packaged Travel Landscape 2006-2010** - This study sizes the total market, analyzes the structure of the tour operator industry, and maps key product and distribution trends. Tactics for better cooperation between tour operators and travel agents are also covered.

**2008 Travel Agent Usage and Pricing Report** - Provides insights into how much consumers are willing to pay for agency services as well as why and how they use travel agents. The study looks at several segments of travel including Airline, Hotel, Cruise, and Packages.

**Independent Agent Report** - Basic operational data for independent agents including host agency usage, commission splits, sales, and revenue are covered in this report.

