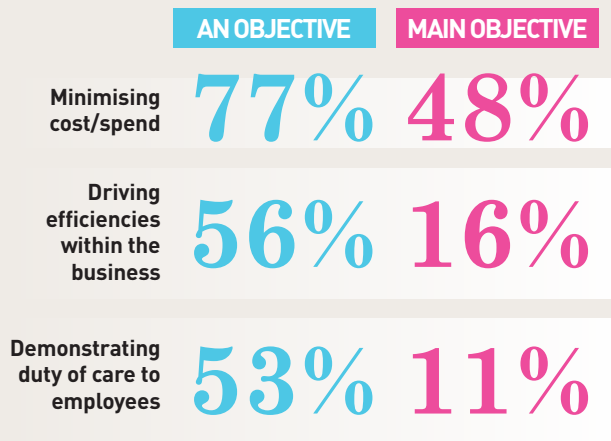


Databank

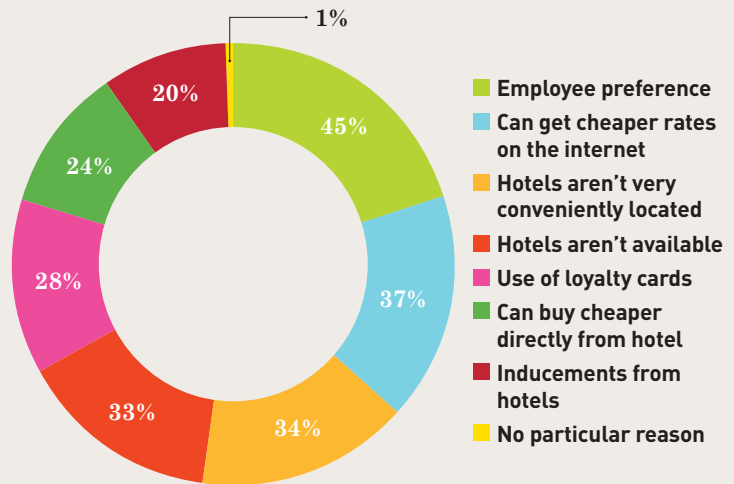
HRS: CONTENT IS KING

For its hotel programme report, HRS interviewed 350 corporate travel professionals

HOTEL BOOKING POLICY: WHAT ARE YOUR GOALS?



WHAT ARE THE MAIN REASONS FOR POLICY LEAKAGE?



Source: HRS report: Content is King

74%

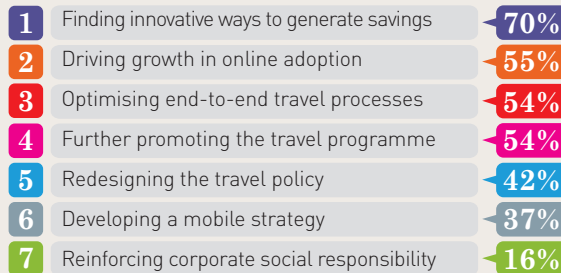
Percentage of 411 UK and Ireland corporate travellers surveyed by Amadeus who feel under pressure to cut business travel costs

Source: Amadeus Business Travel Insights

TRAVEL MANAGEMENT PRIORITIES FOR 2014

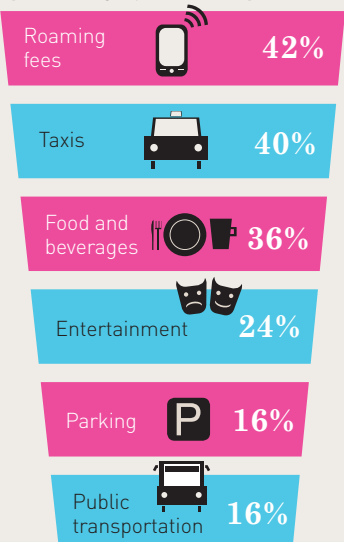
Carlson Wagonlit Travel conducted an online survey of 970 travel managers worldwide, picking their brains for thoughts on the year ahead...

What are your top priorities for 2014?



What do you see as being critical to secondary savings?

Highly critical spend category Respondents



Source: Carlson Wagonlit Travel

GTMC TRANSACTION SURVEY FOR 2013

YEAR-ON-YEAR COMPARISON (BY NUMBER OF TRANSACTIONS)

	Air travel	Hotels	Rail	Car hire	Others	Total
2012/13	7,230,910	4,416,806	4,990,756	413,112	499,825	17,551,409
2011/12	7,032,309	3,945,541	4,761,019	381,725	469,624	16,590,218
% increase	3%	12%	5%	8%	6%	6%

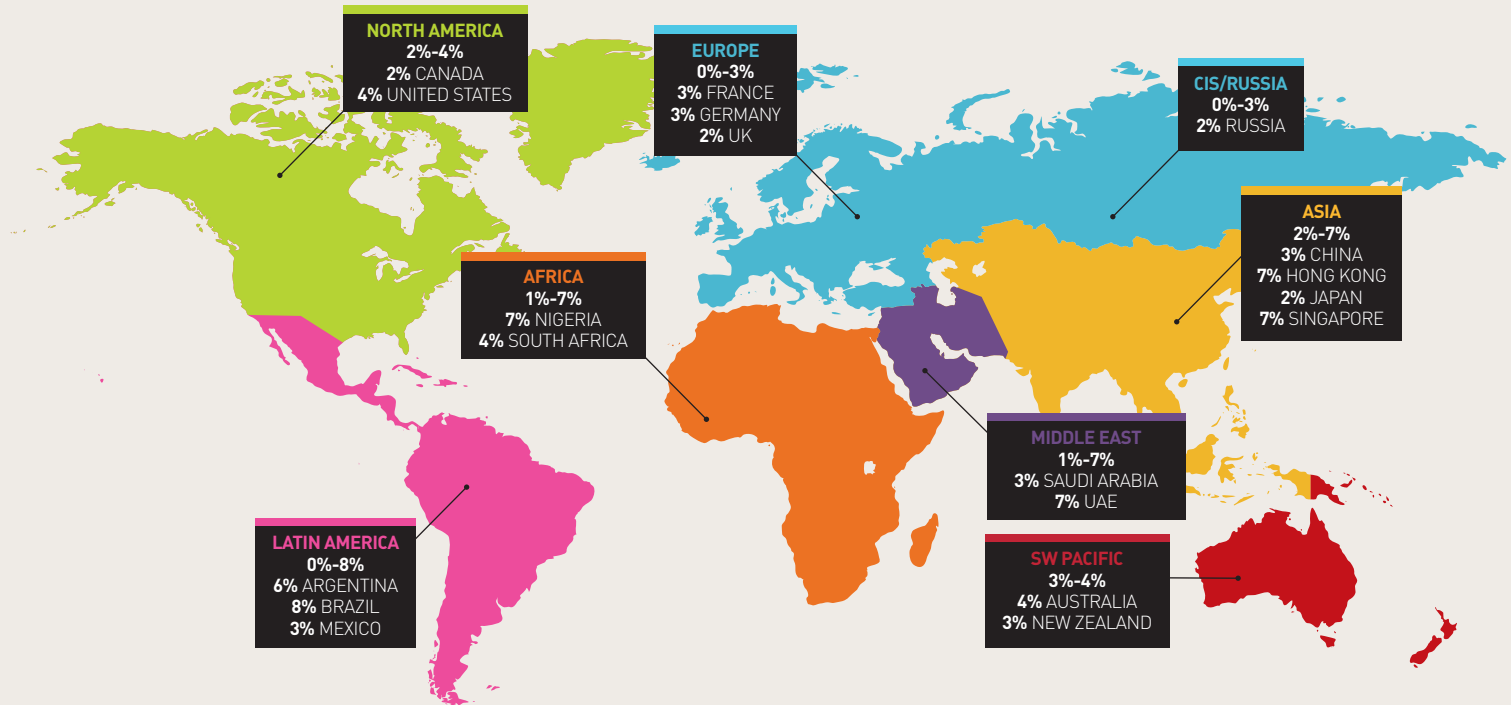
Source: GTMC

ITM INDUSTRY OUTLOOK 2014

Highlights from the Institute of Travel & Meetings annual report, which polled more than 100 of its UK-based travel buyer members

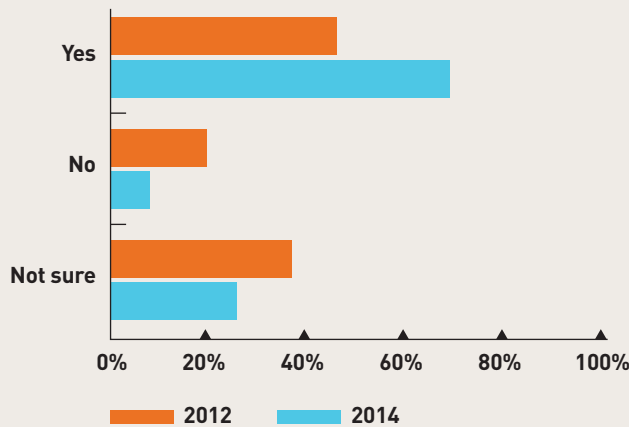
Global hotel rates forecast

Data prepared for ITM by TCG Consulting shows projected price increases around the world. Key business destinations are expected to operate at high capacity during 2014



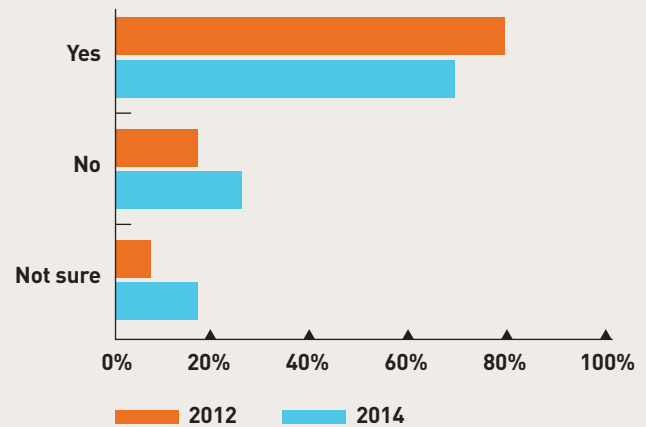
HEATHROW EXPANSION

Do you support the expansion of Heathrow airport to increase capacity?



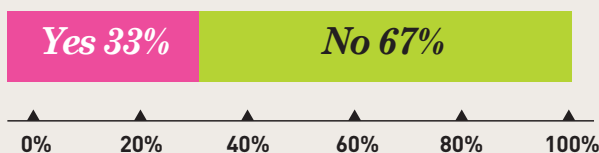
HIGH-SPEED RAIL

Do you support the expansion of high-speed rail in the UK?

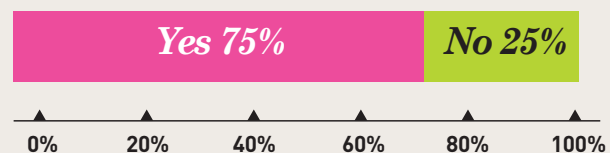


INTEGRATED TRAVEL AND EXPENSES

Does your organisation have an integrated online booking and expense management solution?

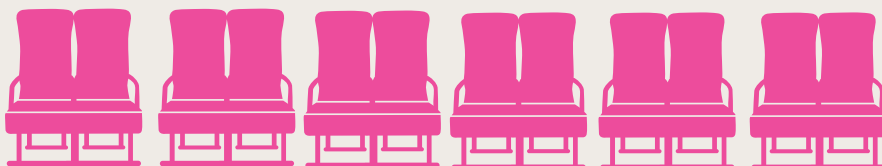


If not, do you plan to implement an integrated online booking and expense management solution in the next 12 months?

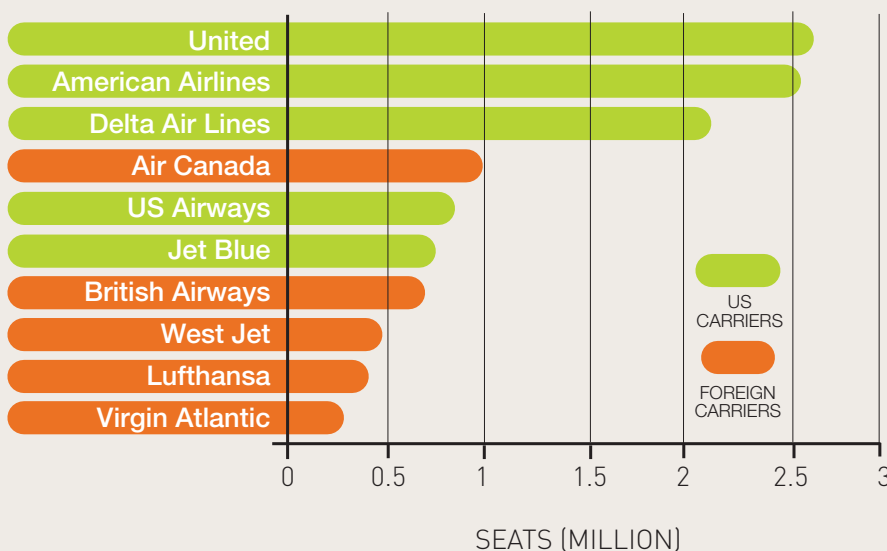


Source: ITM - 2014 Industry Outlook: Trends in Corporate Travel

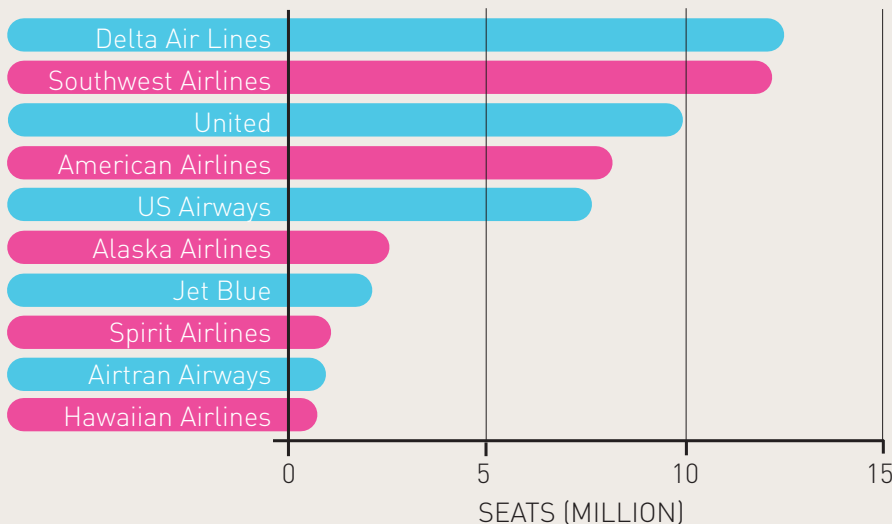
US AVIATION MARKET SHARE



TOP TEN AIRLINES FLYING US-INTERNATIONAL ROUTES BY SEATS

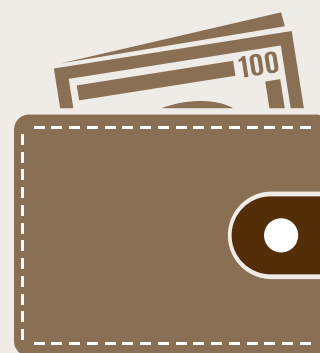


TOP TEN US DOMESTIC CARRIERS BY SEATS



Source: OAG Frequency and Capacity Trend Statistics, February 2014

EXPENSE CLAIMS



52%
BUSINESS TRAVELLERS WITH OUTSTANDING EXPENSES

18%
THOSE WITH OUTSTANDING EXPENSES OF MORE THAN €100

MEN
TWICE AS LIKELY AS WOMEN TO BE OUT OF POCKET BY MORE THAN €100



TOP REASONS FOR NOT BEING REIMBURSED

56%
EXPENSES FALL OUTSIDE COMPANY POLICY

14%
TOO COMPLICATED TO CLAIM

14%
LOST RECEIPTS

12%
TOO LAZY TO CLAIM

Source: Amadeus Business Travel Insights 2014, based on survey in December of 411 UK and Ireland business travellers who work for large companies