Databank

AIRPLUS AND PEW RESEARCH CENTRE:
SURVEY OF US CORPORATE TRAVEL BUYERS

WHAT FUNCTIONS ARE YOUR TRAVELLERS USING ON THEIR SMARTPHONES?

Receive travel alerts (eg flight delays)	83.5%
Check destination information	81%
Use as boarding pass	67.1%
Use to change travel arrangements	45.6%
Provide GPS data for tracking systems	38%
Capture data for expense claims	35.4%
Contact travellers/travel manager via social media	27.8%
Use to pay small travel expenses	6.3%
Other	5.1%

WHAT ARE TRAVEL MANAGERS' RESPONSIBILITIES REGARDING MOBILES AND APPS?

Contribute to smartphone/app strategies	26.7%
Source/negotiate/purchase mobile travel tools	20%
Research/recommend travel tool purchases	32%
Manage use of approved tools	24%
Analyse traveller use of mobile apps	26.7%
Damage control	5.3%
No responsibility for smartphones/apps	52%
Other	5.3%

Source: Airplus International

Off the rails...

£10.2 billion
The amount High Speed 1 (HS1) will eventually have cost the taxpayer over the next 60 years. Margaret Hodge MP, chair of the Committee of Public Accounts, claimed the root of the problem was the "inaccurate and wildly optimistic forecasts for passenger numbers" when the line was being planned and when the Department for Transport restructured its deal with the contractor.

£4.8 billion
The amount paid out of the public purse – so far – to service and repay debts incurred in building the HS1 rail link.

66% and 33%
The amounts by which passenger-demand forecasts – by contractor London and Continental Railways and the Department for Transport respectively – were out.

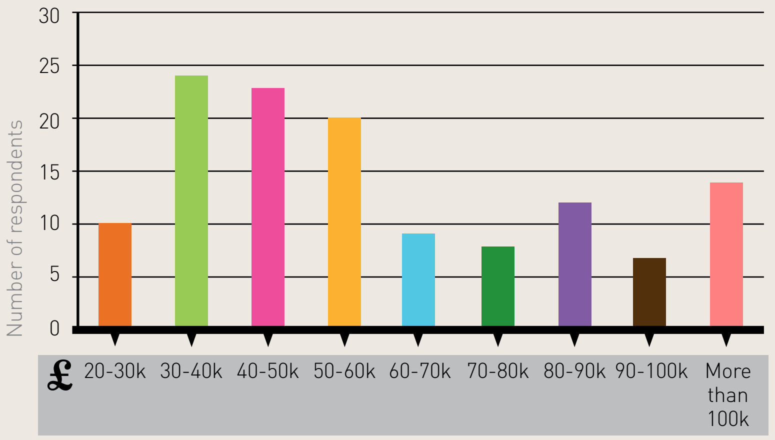
1996
The year in which London and Continental was awarded the contract to build HS1, and...

1997
...the year in which it was realised that Eurostar UK's revenues were nowhere near enough to pay for the scheme.

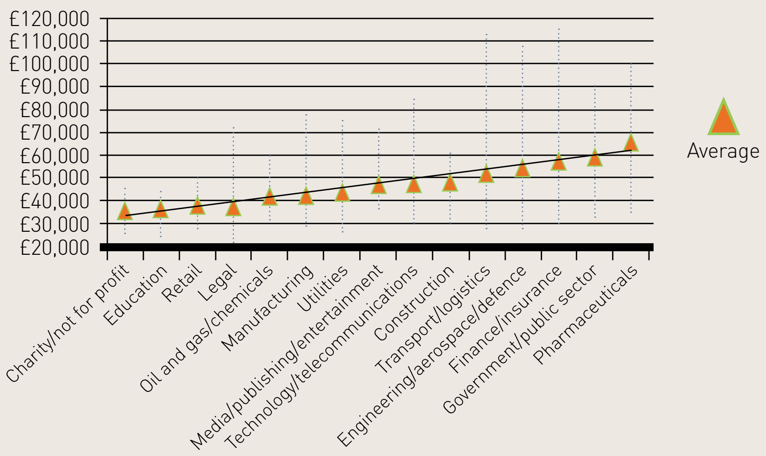
Source: UK Public Accounts Committee

ITM SALARY SURVEY 2012

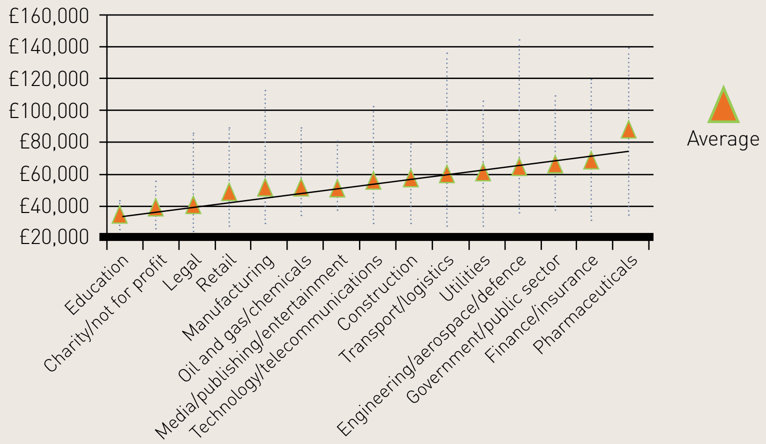
ITM TRAVEL MANAGERS' REMUNERATION: TOTAL SALARY PACKAGE



BASE SALARY BY SECTOR



TOTAL PACKAGE BY SECTOR



Source: ITM Salary Survey 2012

35 PER CENT

The amount the average hotel room rate was forecast to fall by in the aftermath of the Olympics (from £201 per night during the Games to £130 afterwards).

Source: Trivago

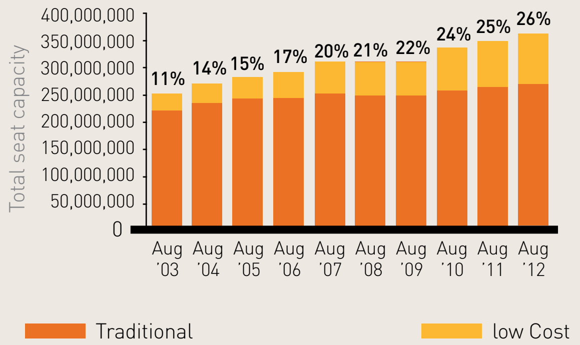
TOP 21 CITIES GLOBALLY BY AVERAGE ROOM RATE

	Jan-Jun 2012	Jan-Jun 2011	Variance to 2011	
	ARR	ARR	GBP	%
MOSCOW	£258.11	£260.68	-£2.57	-1%
LAGOS	£217.05	£231.18	-£14.13	-6%
GENEVA	£215.92	£227.64	-£11.72	-5%
ZURICH	£211.09	£220.40	-£9.31	-4%
RIO DE JANEIRO	£204.65	£196.80	£7.85	4%
NEW YORK CITY	£203.54	£193.96	£9.58	5%
SYDNEY	£198.28	£197.29	99p	0.5%
HONG KONG	£194.51	£189.84	£4.67	2%
PARIS	£193.91	£208.21	-£14.30	-7%
WASHINGTON	£191.87	£198.75	-£6.88	-3%
STOCKHOLM	£191.16	£201.77	-£10.61	-5%
SAN FRANCISCO	£180.38	£162.55	£17.83	11%
OSLO	£180.35	£193.70	-£13.35	-7%
TOKYO	£177.82	£162.50	£15.32	9%
SAO PAULO	£170.95	£154.95	£16	10%
FRANKFURT	£170.62	£168.88	£1.74	1%
COPENHAGEN	£169.08	£166.55	£2.53	2%
SINGAPORE	£167.97	£159.76	£8.21	5%
ROME	£167.18	£165.82	£1.36	1%
ISTANBUL	£165.08	£196.05	-£30.97	-16%
LONDON	£164	£156.82	£7.18	5%

Source: HRG

OAG REPORT AUGUST 2012

Worldwide low-cost seats as percentage of total seat capacity **2003-2012**



Source: OAG

GUILD OF TRAVEL MANAGEMENT COMPANIES QUARTERLY TRANSACTION SURVEY APRIL-JUNE 2012

RUNNING YEAR COMPARISON

	Air travel	Hotels	Rail	Car hire	Others	Total
2012	6,821,472	4,220,052	5,005,620	318,912	477,426	16,843,482
2011	6,670,152	4,105,547	4,591,979	283,198	448,927	16,099,830
	2%	**3%**	**9%**	**13%**	**6%**	**5%**

Q2 2012 v 2011

	Air travel	Hotels	Rail	Car hire	Others	Total
2012	1,781,397	1,001,663	1,258,893	80,293	96,682	4,218,867
2011	1,738,946	1,000,449	1,106,651	76,071	88,083	4,010,200
	2%	**0%**	**14%**	**6%**	**10%**	**5%**

SATISFACTION BY NUMBERS

ACCORDING TO THE American Customer Satisfaction Index (ACSI), US business travellers award hotels an ACSI score of **72 out of a possible 100** for guest satisfaction, while holidaymakers give them a **77**.

Hilton tops the ratings with an ACSI score of **80,** followed by Marriott at **78** and Intercontinental on **77**, while Hyatt, Best Western and Choice are tied on **76**..

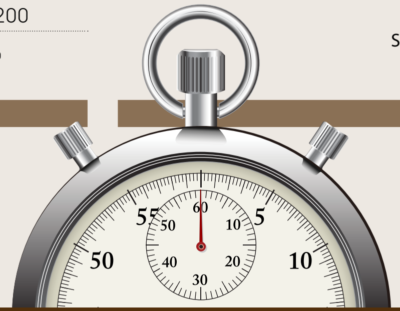
Among airlines, customers are most satisfied with Jet Blue, whose score of **81** overtakes Southwest's **77**. Delta and US Airways both score **65**, with American **(64)** and United **(62)** close behind.

Source: ACSI

£350 MILLION

The amount First Group has pledged to spend to enhance services on the intercity West Coast main line in the first five years of its newly-won franchise.

Source: First Group



ASSOCIATION OF EUROPEAN AIRLINES: AEA members' 2012 first-half performance

	H1 2011	H1 2012	+/-
PASSENGER NUMBERS (000s)			
International short-/medium-haul	92,968	96,914	+4.2%
Total long-haul	34,281	36,126	+5.4%
Total scheduled	171,794	177,640	+3.4%
AVAILABLE SEAT-KILOMETRES (MILLIONS)			
International short-/medium-haul	161,162	164,575	+2.1%
Total long-haul	322,008	333,296	+3.5%
Total scheduled	518,856	533,124	+2.7 %
REVENUE PASSENGER KILOMETRES (MILLIONS)			
International short-/medium-haul	110,785	116,833	+5.5%
Total long-haul	255,137	270,422	+6%
Total scheduled	389,761	411,298	+5.5%
PASSENGER LOAD FACTOR			
International short-/medium-haul	68.7%	71%	+2.2 pts
Total long-haul	79.2%	81.1%	+1.9 pts
Total scheduled	75.1%	77.1%	+2.0 pts

Source: OAG

UP TO THE MINUTE: UK RAIL PUNCTUALITY

PERCENTAGE OF RAIL SERVICES ARRIVING NO MORE THAN ONE MINUTE LATE

	London/ South east	Long distance	Regional/ Scotland	National
2001/02	44.4%	38.4%	50.8%	46.9%
2002/03	45.8%	40.6%	53.1%	48.7%
2003/04	47.8%	45.3%	55.6%	51.1%
2004/05	55%	52.3%	54.6%	54.7%
2005/06	61.1%	57.6%	57.4%	59.4%
2006/07	63.3%	62.6%	62%	62.7%
2007/08	66.8%	63.4%	66%	66.2%
2008/09	68.3%	63.5%	68.5%	68%
2009/10	69.3%	65.8%	72.3%	70.2%
2010/11	69.8%	61.1%	71%	69.6%
2011/12	70.3%	59.7%	71%	69.8%

Source: Association of Train Operating Companies (ATOC)

CARLSON WAGONLIT TRAVEL *CORPORATE TRAVEL PRICE INCREASE/DECREASE FORECASTS FOR 2013*

	EMEA	APAC	North America	Latin America
Air fares	2.5%	2.5%	2.8%	1.3%
Hotel rates	1.3%	3.5%	3.2%	6.3%
Car rental	1.2%	5.9%	-1.1%	1.4%
Meetings/events	1%	6%	4.8%	11%

Source: Carlson Wagonlit Travel