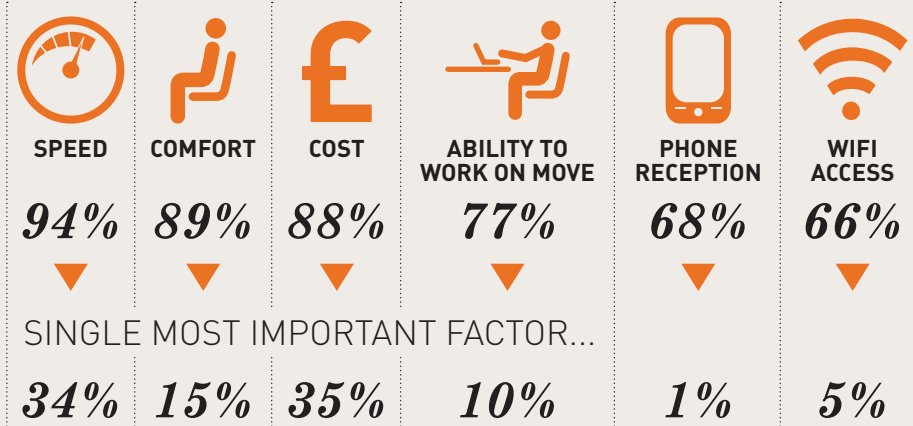


Databank

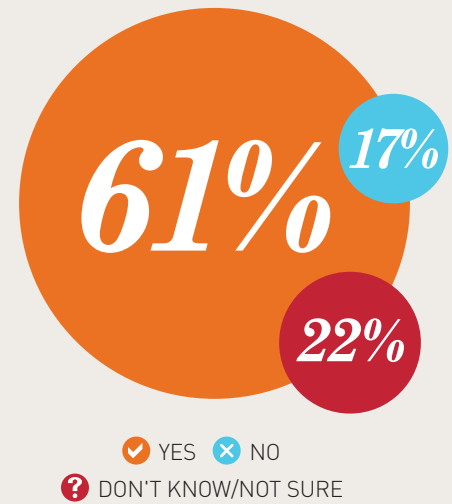
GTMC RAIL REPORT

RAIL TRAVELLER PRIORITIES

When deciding to travel more than 50 miles in the UK by rail, in preference to other modes of transport, how important are these factors?

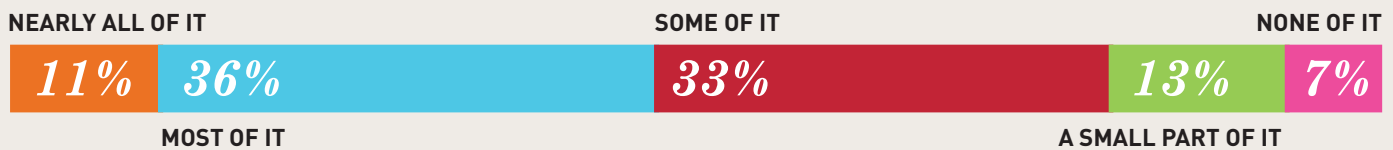


DO YOU THINK THE EAST COAST MAINLINE SHOULD REMAIN IN PUBLIC OWNERSHIP?



ONBOARD PRODUCTIVITY

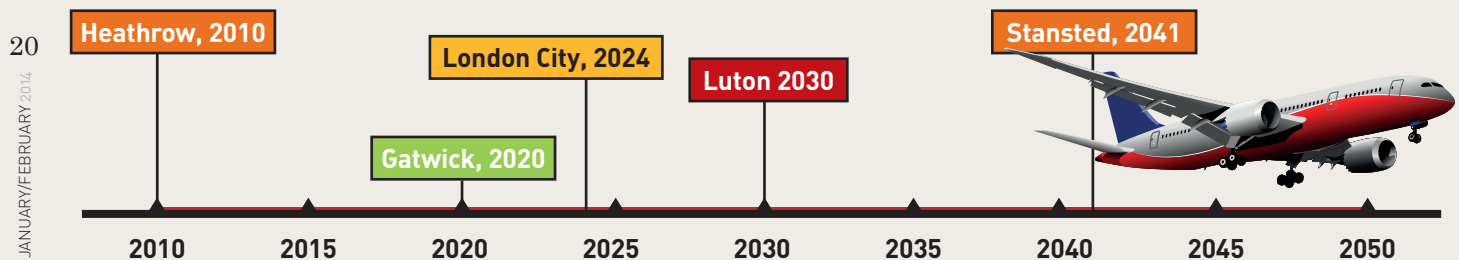
How much time do you spend working while on a 50-plus mile business trip by rail?



Source: GTMC research carried out by Audiencenet, surveying 1,055 frequent UK rail travellers

AIRPORTS COMMISSION: FULL TO CAPACITY

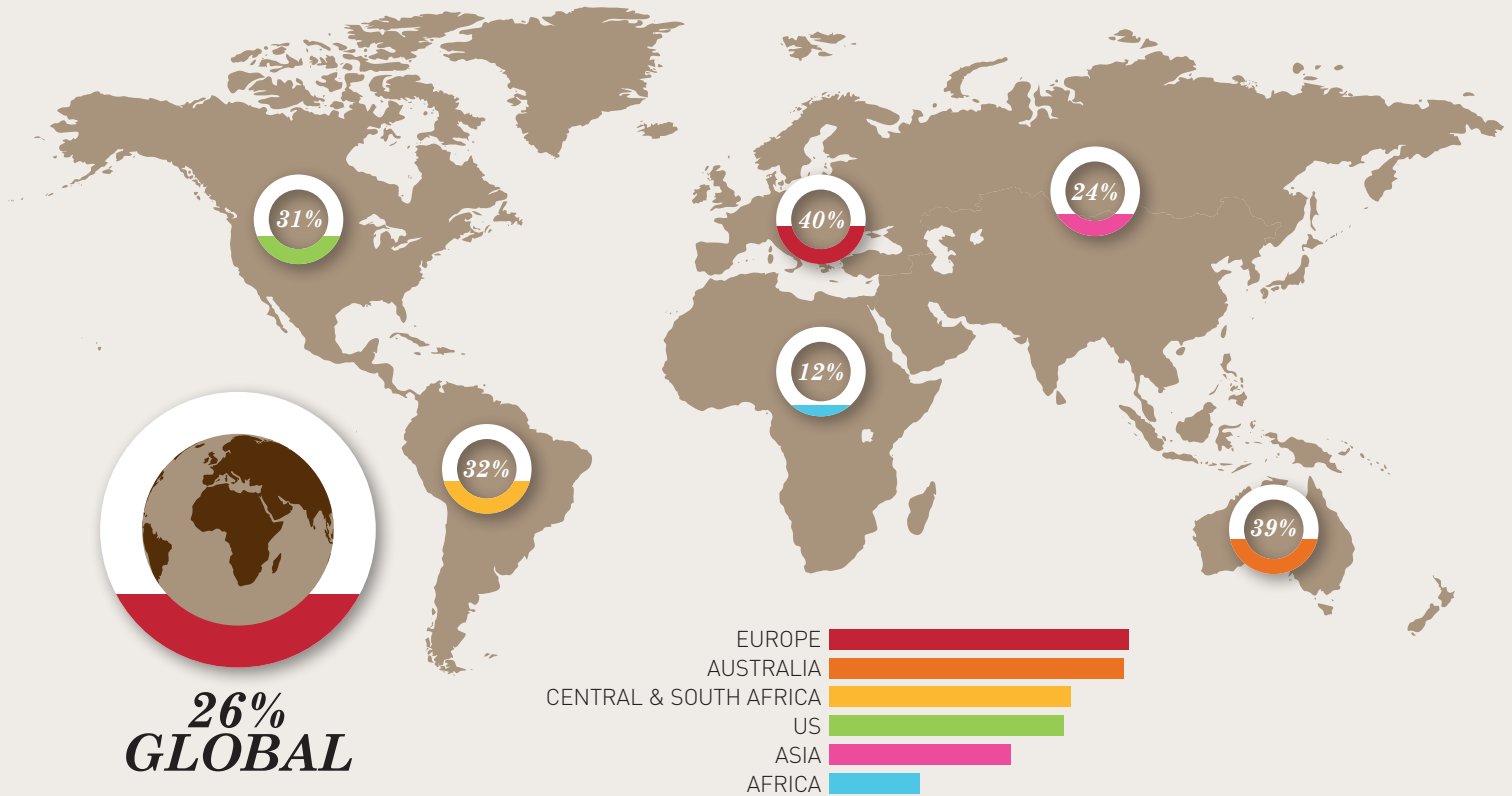
Timeline for when the UK's five London gateways are expected to reach capacity (Heathrow having already done so over three years ago)



Source: Airports Commission

LOW-COST CARRIERS: MARKET SHARE

CAPA Centre for Aviation research shows variation of LCC share of air traffic in regions around the world



Source: CAPA Centre for Aviation

DELTA'S JOINT VENTURE

Delta shows how its joint venture with Virgin Atlantic increases its reach from the US to key European markets

TOP TEN MARKETS US-EUROPE	Delta's direct services pre-JV	Direct services with Virgin
New York-London	✓ 3 daily	✓ 7 daily
Los Angeles-London		✓
New York-Paris	✓	✓
Chicago-London		✓
Newark-London		✓
Miami-London		✓
Washington DC-London		✓
Boston-London	✓	✓
San Francisco-London		✓
New York-Frankfurt	✓	✓

Source: Delta

87% OF TRAVEL EXECUTIVES SAY NO-FRILLS BUSINESS CLASS WILL BE ADOPTED GLOBALLY

Source: World Travel Market Industry Report

RATEABLE VALUES

Hotel booking portal HRS's figures show most UK cities have decreased their average room prices per night

Top destinations in the UK	Average room price per night in Q3/2013	Comparison/change Q3/2012 to Q3/2013	Average room price per night in the last 12 months (October 2012 - September 2013)
Birmingham	£67.30	-6.96%	£72.74
Bristol	£86.83	-4.36%	£86.60
Edinburgh	£108.56	-11.76%	£96.76
Glasgow	£74.41	-0.11%	£74.58
Leeds	£70.27	-3.59%	£72.87
Leicester	£72.47	-10.67%	£75.28
Liverpool	£72.09	-8.02%	£75.09
London	£124.76	4.11%	£119.01
Manchester	£82.28	3.94%	£83.16
Reading	£86.34	4.66%	£86.26

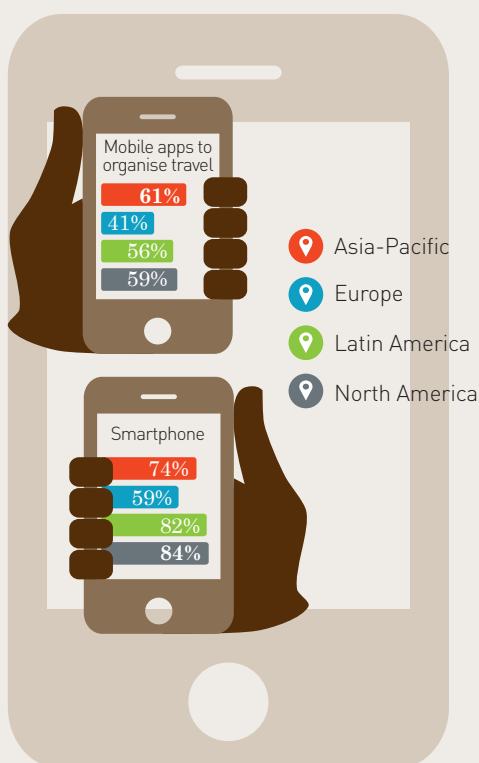
Source: HRS

Egencia and GBTA Foundation report

The GBTA Foundation and Egencia surveyed 1,429 travel managers across North America, Europe, Asia-Pacific and Latin America, asking them their opinions on the evolution of travel management

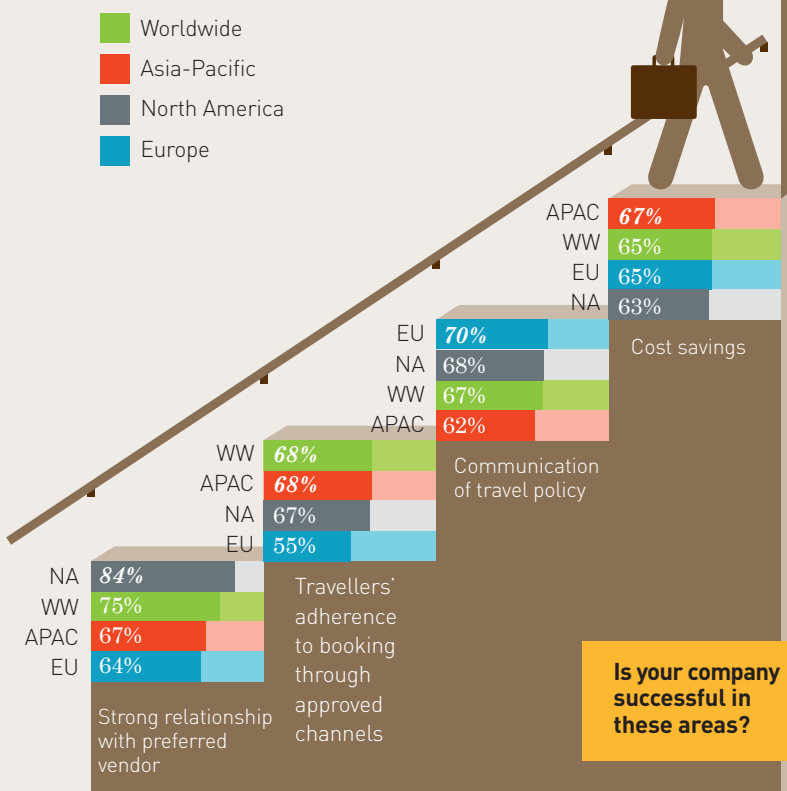
MOBILE TRAVEL TOOLS

Travel managers around the world who cited mobile tools as important or very important



HOW ARE YOU DOING?

Travel managers were asked in what areas they felt they were achieving success, and some areas saw a notable disparity between the regions



FUTURE ESSENTIALS

Travel managers were asked what they consider essential for a global programme in the future

	WORLDWIDE	ASIA	EUROPE	NORTH AMERICA
Cost containment strategies	74%	74%	65%	77%
Data integration in travel programme	73%	56%	82%	88%
Flexibility	68%	74%	61%	68%
Integration of mobile technology in travel programme	65%	58%	57%	73%
Adapting to different traveller demographics	55%	57%	47%	59%

Source: Egencia and GBTA Foundation

US\$ 262 BILLION

GBTA'S PREDICTION FOR CHINA'S SPEND ON BUSINESS TRAVEL IN 2014



A year-on-year rise of more than 17%, based on GBTA's 2013 projection of US\$224 billion

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