

NUMBER CRUNCHING

Buying *Business Travel* presents the salient stats and relevant facts...

WINGED WORRIERS

Sabre Airline Solutions polled 90 airlines worldwide to discover what keeps them awake at night, and how they plan to get over it.

57%

say fuel price instability is aviation's biggest single external challenge

55%

have issues with government regulations, with airport security and eco-edicts among the biggest bugbears

67%

say increasing revenues and cutting costs is their biggest management battle

11%

plan to use ancillary revenues to bolster the bottom line, while 44 per cent plan better management of the revenues they already have

58%

believe merchandising and ancillary revenues to be the best way forward, even if they have no firm plans as yet

86%

reckon customer loyalty has the most positive impact on their business, and 50 per cent say customer experience is the best way to earn that loyalty

Source: Sabre Airline Solutions

HEATHROW'S THIRD RUNWAY

WHAT IT WILL COST?

£9 BILLION

(estimate for new runway and terminal building)

WHAT IT WILL IT EARN?

£7 BILLION

(net economic benefit, per annum, to the UK)

THE ALTERNATIVES

£2.5 billion (net UK economic benefit, per annum, from mixed mode on existing runways)

£1 billion (average cost per annum of delayed expansion at Heathrow)

£5.3 billion (minimum cost of 10-year wait for expansion at Stansted or Gatwick)

£8.9 billion (minimum cost of 20-year wait for a completely new gateway hub)

HEATHROW TODAY

72,000 employed at the airport

100,000 jobs supported elsewhere

65.7 million passengers (year to Sep '09)

33.6 per cent are business travellers

37 per cent are transit passengers

RUNWAY RIVALS

Heathrow	2
Frankfurt	3
Paris CDG	4
Amsterdam Schiphol	5

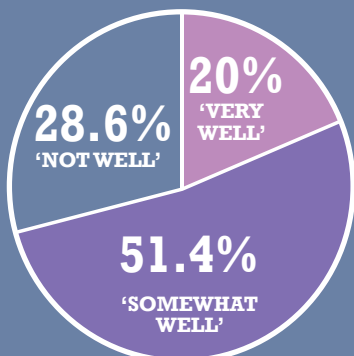
UK AIRPORTS – THE FUTURE

	PASSENGERS	ATMs
Year	(millions)	(thousands)
2005	228	2,333
2010	258	2,416
2020	350	3,190
2030	427	3,759
2040	490	4,148
2050	525	4,423

Sources: DfT, British Chambers of Commerce, Future Heathrow, BAA plc

TRACKING YOUR TRIP

In its recent Total Cost of Trip survey, ACTE asked 350 global travel managers and buyers which of the following statements best described how their organisation is tracking 'total cost of trip' expenditures...



Source: Association of Corporate Travel Executives

GTMC MEMBERS' TRANSACTIONS 2009

	AIR	HOTEL	RAIL	CAR	OTHERS	TOTAL
Q1/08	1,885,435	963,406	961,500	76,430	93,952	3,980,723
Q1/09	1,568,707	889,340	1,091,461	70,981	123,291	3,743,780
Variation	-17%	-8%	+14%	-7%	+31%	-6%
Q2/08	1,895,644	997,296	982,335	78,268	144,949	4,098,492
Q2/09	1,492,862	868,579	1,051,367	64,906	89,612	3,567,326
Variation	-21%	-13%	+7%	-17%	-32%	-13%
Q3/08	1,708,892	968,062	907,638	79,374	102,911	3,766,977
Q3/09	1,449,289	866,284	1,039,905	65,787	75,921	3,497,187
Variation	-15%	-11%	+15%	-17%	-26%	-7%
YTD08	5,489,971	2,928,764	2,851,473	234,072	341,812	11,846,192
YTD09	4,510,858	2,624,203	3,182,733	201,674	288,824	10,808,293
Variation	-18%	-10%	+12%	-14%	-16%	-9%

Source: GTMC Quarterly Transaction Survey (provisional figures)

TERMINAL TRIVIA

£89,000 Average personal income of business travellers at London City, compared with £78,000 at Heathrow, £68,000 at Luton and £56,000 at Exeter

14% The proportion of business travellers at Bristol airport. More than one-third of Heathrow's passengers are travelling on business

£4,700 The average year-on-year decline in the household income of Heathrow business passengers

3% The proportion of travellers using public transport to get to Exeter airport, against 50 per cent at London City and 47 per cent at Stansted

50/50 The male-to-female passenger ratio at Luton airport; 48 per cent of passengers at Manchester and Stansted are women

56% The number on non-UK residents using Heathrow, compared with just eight per cent at Exeter and 14 per cent at Bristol

35% The number of transfer passengers at Heathrow. Cardiff and Exeter failed to notch up even one per cent

48 The average age of passengers at Exeter, an entire decade ahead of the youthful 38-year-olds flocking though Stansted

Source: Civil Aviation Authority

TOOLED UP

Among buyer members of the Institute of Travel & Meetings:

70 per cent now use self-booking tools

58 per cent use expense management software

52 per cent use traveller tracking technology

33 per cent plan to adopt mobile travel updates

25 per cent plan to adopt meetings booking tools

Source: ITM/Argate

STOCKWATCH

Avis Europe	23p
British Airways	201p
Capita Group	731p
EasyJet	352p
FirstGroup	388p
Hogg Robinson Group	33p
InterContinental Hotels ..	903p
Mandarin Oriental	83p
National Express	182p
Ryanair	277p
Stagecoach	165p
Whitbread	1330p
As of December 15, 2009	