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Corporate Travel
Benchmark Report
July 2007

GetThere's seventh annual Corporate Travel Benchmark Survey provides a snapshot of the online travel trends, savings and adoption techniques currently in use at leading companies. All results are based on March 2007 travel data as self-reported by each company's corporate travel department. This year's questionnaire and analysis were overseen by ProMedia.travel custom publishing.

The Benchmark Report shows an overall increase in online adoption for the seventh consecutive year with leading companies reaching a median of 71% adoption, up from 68% as reported in 2006. The average online adoption of the 10 highest-adopting companies is 92%.

The survey reveals that companies are continuing to report online travel cost savings resulting from higher adoption--51% online agency fee savings and 13% online airfare savings, representing approximately \$100 savings per online booking. Forty percent of the companies base their online adoption calculations on all bookings. Although some companies exclude some types of travel in their calculations, more companies continue to implement new online features allowing more types of transactions to be booked online, thereby maximizing online savings opportunities.

More companies have expanded their online travel programs beyond the United States this year with a major focus on Great Britain, Canada, France and Germany. The number of companies expanding globally in 2007 is significantly higher and the average adoption rates by region range from a high of 98% in India and Japan to a low of 14% in Brazil. Reported regional online adoption averages reported were 65% in Latin America, 45% in Asia Pacific and 41% in Europe.

Meetings or group travel account for an average of 19% of companies' total global travel spend. Companies reported that 69% of meetings-related travel was for ad-hoc meetings rather than for large corporate events. Although 23% of companies report they currently exclude meetings and group travel from being booked online, 54% of the respondents are using or evaluating online meeting planning tools this year, and another 18% plan to evaluate meeting planning tools next year. Companies using an online meeting planning tool report 53% of their total meetings were planned online and 60% of their meeting travel was booked online.

Mid-market and large-market companies from all over the globe and various industries are represented in the 2007 survey results, indicating that companies of all sizes continue to evaluate savings metrics and expand their travel programs to take advantage of online savings opportunities.

Methodology - The GetThere Corporate Travel Benchmark Report is based on survey responses from more than 75 companies that currently use the GetThere online booking tool. An online survey was sent to 230 GetThere clients and the survey received a 33% response rate. Please direct any questions about this report to info@promedia.travel or adoptionconsulting@getthere.com

KEY FINDINGS

ONLINE ADOPTION: Average online adoption increased for the seventh consecutive year as companies reported a mean of 71% adoption in 2007, up from 68% in 2006. The average of the ten highest online adoption rates reported was 92%. Online adoption is based on reported monthly online bookings as a percentage of total monthly bookings.

GLOBAL ONLINE ADOPTION: Companies continue to expand their online travel programs globally with an overall adoption rate of 72% and the median adoption rate of 85%. Regional online adoption rates averaged 65% in Latin America, 45% in Asia Pacific and 41% for Europe. New online program expansion occurred primarily in Canada, Australia/New Zealand and Nordic Countries, and adoption by country ranged from a high of 98% in India and Japan to a low of 14% in Brazil.

ADOPTION INITIATIVES: For five of the past six years, top companies have cited "Executive support" as the most effective factor driving online adoption; this year it rated 4.4 on a five-point scale. "Full or partial online mandates" always ranks high and this year customers scored it the second most effective adoption technique, with 67% of companies using or considering either full or partial mandates.

E-FULFILLMENT: E-fulfillment centers are more common, with 87% of companies using or considering it. The average touchless fulfillment rate, or the percent of bookings that don't require human intervention to ticket, is 71% and low-touch bookings are at 32%. Those companies that use a centralized e-fulfillment center have an adoption rate almost 10 percent higher than those that do not.

SITE FEATURES: Almost two-thirds (64%) of companies activated GetThere's Air Low Fare Search Matrix this year to drive higher online adoption. More than half (53%) moved to the new user interface and increased their online adoption. Other online site features such as Hold Trips, booking Amtrak and Online Ticket Voids and Full Refunds ranked very effective in driving higher online adoption. These and other features help companies to continue cutting travel costs and empower travelers to manage more types of transactions online.

ONLINE SAVINGS: *Agency Savings* - 87% of companies reported having tiered transaction fees set up with their travel agency. Average online agency fee savings was 51%. *Airfare Savings* - 75% of companies reported lower airfares booked online compared to those booked with their travel agency. Their average savings was 13%. *Hotel Savings* - 33% of companies report lower nightly hotel rates booked online compared to those booked with their travel agency. Average hotel rate savings was 13%.

ONLINE MEETINGS: More than 70% of survey respondents were using online meeting planning tools or evaluating them this year. Another 18% were planning to evaluate them in 2008, indicating a high level of interest from companies looking to better manage corporate meeting spend.

COST REDUCTIONS: 83% of companies cited travel and 61% cited meetings as the top areas to focus on when evaluating cost-cutting measures, followed by reductions in workforce (41%) and advertising/marketing (27%). The most effective tools cited for reducing travel expenditures included adjustments in travel policy, utilization of online booking tools and better tracking.

NEW RESPONSIBILITIES: 70% of respondents indicated they were assigned new responsibilities in 2007 with the primary focus on globalizing their travel programs (61%), combining online booking with expense management tools (36%), exploring sustainable travel for carbon neutralization (32%) and consolidating travel agencies (31%).