

**EXECUTIVE SUMMARY**

The GetThere Corporate Travel Benchmark Report is based on survey responses from over fifty companies using GetThere online booking tools. These benchmarks provide a snapshot of the online travel trends, savings and adoption techniques that are currently in use at leading companies. The last page of the report includes benchmark breakouts for specific industries and regions as well as results for mid-market and large-market companies. All results are based on June 2005 travel data as self-reported by each company's corporate travel department.

This year's Benchmark Report shows an increase in online adoption for the fifth consecutive year as leading companies have reached an average of 65% adoption. Driving this adoption growth is online travel cost savings consisting of 49% online agency fee savings and 14% online airfare savings benchmarks, which represents approximately \$100 savings per online booking. With the continued focus on cost-cutting, companies overwhelmingly cited executive support and online mandates as the most effective means for driving online adoption.

While 93% of companies responding this year are based in North America, 59% have expanded their online travel programs beyond North America, up from only 41% last year, so much of the survey results apply globally. Results of the 2005 Benchmark Survey indicate that customers of all sizes and from various industries have encountered similar obstacles such as cultural differences and accessing content as they plan to expand their programs into various regions around the world.

The 2005 survey respondents represent both mid-market companies (those with less than \$25M air spend) and large-market companies (those with more than \$25M air spend). Online adoption at mid-market companies averaged 67% compared to 64% for large-market companies (both up from 2004). Mid-market companies have higher adoption averages in EMEA and Latin America however large-market companies have higher overall global adoption. The large-market companies also report slightly higher agency savings of 51% as well as higher touchless rates in fulfillment of 74% as compared to mid-market companies. And, the large-market companies have negotiated or plan to negotiate lower fees with their agency for processing exchanges, voids and refunds as part of their plans to move those transactions online. Clearly, companies of all sizes are continuing to take advantage of these more strategic initiatives and the many new online features for their online travel programs to maximize their online savings potential.

Please direct any questions about this report to AdoptionConsulting@GetThere.com.

KEY FINDINGS

- * Average online adoption has increased for the fifth consecutive year as companies report an average of 65% adoption in 2005, up from 60% in 2004. The average of the ten highest online adoption rates reported was 92%. Note that online adoption is based on reported monthly online bookings as a percentage of total monthly bookings.
- * Over half of the companies responding (52%) calculate online adoption rates based on all bookings, up from the 40% reported for 2004, indicating that more companies are now including previously excluded types of travel such non-employee, executive/VIP, meetings and international travel in their online adoption calculations.
- * Many companies have rolled out online booking beyond North America and are experiencing similar success with online adoption rates of 51% in EMEA, 56% in Latin America and 79% in Asia Pacific. The average overall global online adoption rate reported for areas outside of North America in 2005 is 63%, which is up from 55% last year.
- * Many companies have plans to expand globally this year with Canada, Great Britain and France being the major focus. Corporate customers also indicate a continued focus on the opportunities to drive adoption even higher in the United States perhaps by launching their online program to other divisions, offices or regions domestically.
- * Full and partial online booking mandates continue to become more common. 52% of companies were mandating in 2004 and 62% of companies are mandating in 2005. Companies using a mandate are averaging 76% adoption versus 55% adoption for those that don't.
- * E-fulfillment centers also continue to become more common. 67% of companies were using an e-fulfillment center in 2004 and 73% of companies are using one in 2005. The average touchless fulfillment rate, or the percent of bookings that don't require human intervention to ticket, is 71% overall but is slightly lower at companies not using an e-fulfillment center (67%). And companies using e-fulfillment centers average 69% adoption versus 58% for those that don't.
- * For the third year in a row, top companies report executive support is the most effective technique for driving online adoption, rating 6.3 on a scale of 1 to 7 and mandates were second with a 5.8 on the scale. Also very important are "Ongoing communications campaign", "Active support from travel agency" and "Defined adoption and savings goals" for promoting online travel programs.
- * Almost one-third of companies report they will activate Online Ticket Exchange (online voids, refunds and exchanges) this year. Other new online site capabilities such as Hold Trips, Booking Rail and non-GDS carriers online are being activated in 2005. This is a clear indication that corporations are ready to make these types of transactions available to travelers online and travelers are eager to manage more of their business travel online.
- * 81% of companies report having tiered transaction fees set up with their travel agency. Average online agency fee savings was 49%, which represents approximately \$24 savings on a typical \$50 offline agency fee.
- * 74% of companies reported lower airfares booked online compared to those booked with their travel agency. Average online airfare savings was 14%, which represents \$70 savings on a typical \$500 airfare.
- * Companies surveyed believe GetThere's new online capabilities will allow more types of trips to be booked online. In addition, 71% of companies report that they believe their online adoption rates will increase as the GetThere interface takes on more of a leisure look-and-feel with the new GetThere Enhanced Design.
- * Mid-market companies (those with less than \$25M air spend) report averaging 67% online adoption in North America which is slightly higher than large-market companies (those with more than \$25M air spend) who report 64% online adoption. Although adoption is significantly higher in EMEA and Latin America for mid-market companies, large-market companies have higher overall global adoption than mid-market companies. Also, large-market companies indicated they have plans to rollout their online programs in several more countries in 2005. Mid-market travel programs are somewhat easier to manage and tend to be more centralized and less global than large-market companies as these results validate. As expected though, 90% of large-market companies are reporting lower airfares online and 94% have negotiated lower transaction fees with their agency for online bookings. However, only 50% of mid-market companies report lower airfares and 76% have negotiated lower agency fees.