Increasing GetThere Online Adoption Rates
Corporate Online Adoption Benchmarks
2001-2010

[1] GetThere 2010 Corporate Travel Benchmark Survey
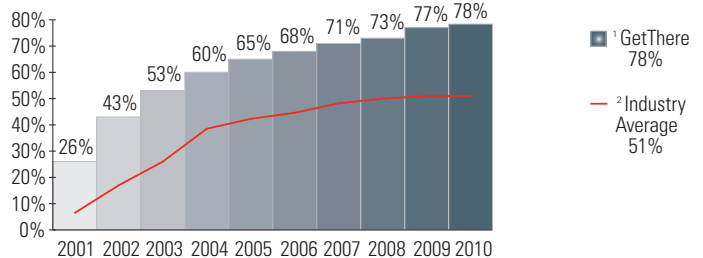[2] Industry averages based on PhoCusWright US Travel Distribution 2009

GetThere's Corporate Travel Benchmark Survey provides a summary of the online travel trends and savings and adoption techniques currently in use at leading companies around the globe. All results are based on December 2010 travel data as self-reported by each company's corporate travel department.

Executive Summary

Following a year widely marked by an economic downturn and a softening in travel demand, 2010 saw business travel show signs of making a steady recovery. Almost a third of respondents to the GetThere Benchmark Survey reported that their travel spend increased slightly, while another 11 percent said it increased considerably and 22 percent said it remained flat year-over-year.

The survey suggests travel will continue to rebound in 2011 with a healthy 61 percent of respondents projecting their travel budget to increase anywhere from one to 10 percent vs. last year.

Asia again checks in as the top market for growing travel demand with responding companies anticipating a 54 percent increase. North America followed with 47 percent, trailed by Europe and Latin America at 37 percent apiece, and finally the Middle East at 29 percent.

For the tenth consecutive year, companies have increased their online adoption using GetThere. Customers have reached 78 percent adoption in North America, up a percentage point from a year ago. The average of GetThere's 10 highest-adopting companies is an astounding 95 percent. GetThere's average adoption remains well above the industry average of 51 percent, as based on PhoCusWright's U.S. Travel Distribution 2009 Report.

North America was not the only region to experience an increase in adoption – in fact, GetThere customers raised adoption across the board globally. EMEA increased by seven percent, Latin America by four percent and APAC by one percent (see the table to the right for adoption figures).

In another continuing trend that proves GetThere results in sustainable savings, companies reported significant cost savings from their high adoption rates:

- 70 percent online agency fee savings
- 59 percent realized lower online booking rates vs. offline by using GetThere
- 18 percent air savings domestically, 24 percent internationally
- 12 percent hotel savings domestically, 31 percent internationally
- 4 percent rental car savings domestically, 18 percent internationally

Average Online Adoption by Region	
APAC	66%
EMEA	58%
Latin America	67%
North America	78%

	Domestic	International
Airfare Savings	18%	24%
Hotel Savings	12%	31%
Rental Car Savings	4%	18%

GetThere
800.850.3906 | www.getthere.com

Key Findings

ONLINE ADOPTION: Average online adoption increased for the tenth consecutive year as companies reported an average of 78 percent adoption in 2010, up a point from 2009. The average of the companies with the ten highest online adoption rates is 95 percent. Online adoption is based on reported online bookings as a percentage of total bookings. GetThere's online adoption remains well above the industry average of 51 percent, according to PhoCusWright's U.S. Travel Distribution 2009 Report.

GLOBAL ONLINE ADOPTION: Corporations are more zealous than ever to take their online workspaces abroad and are successfully growing adoption globally. Adoption improved in APAC to 66 percent, EMEA to 58 percent and Latin America to 67 percent.

ADOPTION INITIATIVES: Respondents continue to cite executive support as the most effective factor driving online adoption. This year it rated 5.73 on a seven-point scale. Other effective methods include implementing a full or partial online mandate, and improving the online tool with a special focus on providing access to regional content.

ONLINE SAVINGS: *Agency Savings –* Ninety-two percent of companies reported having tiered transaction fees set up with their travel agency, a double digit increase from 2009. Online agency fee savings averaged 70 percent. *Airfare Savings –* Sixty percent of companies reported lower airfares booked online compared to those booked with their travel agency. Their average savings were 18 percent domestically and 24 percent internationally. *Hotel Savings –* Companies reported lower nightly hotel rates booked online compared to those booked offline with 12 percent savings domestically and 31 percent internationally. *Car Savings –* Average rental car rental savings were four percent domestically and 18 percent internationally.

TRAVEL DEMAND: As opposed to a year ago, respondents are by and large projecting an increase in travel demand for their corporations. In North America, 47 percent of respondents anticipate an increase in 2011 travel demand, whereas last year only 22 percent predicted an increase.

MAJOR CHANGES: With 63 percent of responses, reviewing corporate policy once again takes the top spot for changes being considered for the travel program. Other major changes under consideration include integrating travel and expense management (39 percent) and integrating meetings and events into the online program (29 percent).

MOBILE: For the second straight year, respondents ranked obtaining flight information as the most important feature of a mobile solution. Booking flights was ranked as the second most important feature and booking hotels third.

SITE FEATURES: The Travel Arranger Portal continues to be GetThere's most popular site feature with 80 percent of respondents using it. The portal is followed by multiple sub-sites with 66 percent and Unused Ticket Tracking, a feature new to the benchmark report, at 62 percent.

Annual Global Air Spend	Overall %
Less than $4.9M	16%
$5M to $9.9M	18%
$10M to $24.9M	21%
$25M to $49.9M	13%
$50M to $99.9M	5%
$100M or more	27%

Average Ticket Price (Roundtrip, Dec. 2010)	Overall
North America	$440
International (Outside North America)	$2,270

Average Hotel Rate (per Day, Dec. 2010)	Overall
North America	$145
International (Outside North America)	$207

Average Car Rental Rate (per Night, Dec. 2010)	Overall
North America	$49
International (Outside North America)	$68

Travel Department Reports to:	%
Finance	32%
Procurement	30%
Administration	14%
Corporate / Shared Services	14%
Human Resources	5%
Technology / CIO	3%
Other	2%

Primary GDS	Overall %
Sabre	84%
Apollo	8%
Galileo	5%
Worldspan	3%

Implemented on GetThere	Overall %
Less than one year	13%
1 - 2 years	17%
3 - 4 years	10%
4 - 5 years	2%
5+ years	58%

ANALYSIS: The Benchmark Report represents a balanced cross section of small- to large-market companies as determined by their annual travel spend. The majority of survey respondents (62 percent) report to either procurement or finance, which is on par with last year's findings.

Average Ticket Price (ATP) for North America increased for the first time in two years, jumping by nearly five percent. International ATP increased by 17 percent.

North America hotel rates are up marginally over 2009, while international rates increased by 10 percent.

North America car rental rates increased slightly, while international rates increased by 11 percent.

Primary Agency	Overall %
Carlson Wagonlit Travel (CWT)	38%
American Express	17%
BCD Travel	17%
Travelocity Business	13%
In-House Travel Department (CTD)	5%
Other	10%

Primary Region	Overall %
North America	87%
EMEA	11%
APAC	2%

Primary Region within North America	Overall %
Northeast	31%
Southwest	18%
Midwest	15%
Mid-Atlantic	11%
New York City	9%
Northwest	5%
South Central	4%
Southeast	4%
Canada	2%
Other	2%

Primary Industry	Overall %
Financial	14%
Technology / Software	14%
Healthcare / Pharmaceuticals	11%
Manufacturing	8%
Professional Services (non-financial)	8%
Oil & Gas	6%
Consumer Products	3%
Retail	3%
Other	21%

Travel Profiles Reside	Overall %
Within GetThere	48%
With travel agency	30%
Within the company	10%
Within the GDS	8%
Other	5%

ANALYSIS: Survey respondents are quite diverse. They partner with the major travel management companies, are in major industries and have a global presence.

Compared to prior years, how did your overall 2010 travel spend change?

	Overall %
Increased somewhat	29%
Decreased somewhat	24%
Remained the same	22%
Decreased considerably	11%
Increased considerably	11%
Don't know	3%

By what percentage do you anticipate your 2011 travel budget to change vs. 2010?

	Overall %
Decrease by more than 20%	0
Decrease by 16-20%	0
Decrease by 11-15%	0
Decrease by 6-10%	9%
Decrease by 1-5%	9%
Remain the same	6%
Increase by 1-5%	32%
Increase by 6-10%	29%
Increase by 11-15%	3%
Increase by 16-20%	6%
Increase by more than 20%	6%

What percentage of your budget is allocated toward emerging markets?

	Overall %
Less than 10%	18%
11-20%	13%
21-30%	3%
31-40%	3%
41-50%	0
More than 50%	0
Don't know	41%
None	21%

How has the economy impacted your travel program and/or negotiations with your preferred carriers (check all that apply)?

Answer	Overall %
Plan to use more web and/or video-conferencing in place of in-person meetings	34%
Preferred carriers have renegotiated a better corporate discount	33%
Have begun negotiations with new preferred carriers	26%
Plan to decrease corporate travel spend	21%
Preferred carriers have renegotiated a less desirable corporate discount	5%
Have begun evaluating car and/or rail options vs. air	3%
Other	3%
None of the above	25%

Did the use of rail and/or ground options supplant air travel in select short-haul city pairs in 2010?

Answer	Overall %
Yes	20%
No	57%
Don't know	23%

Do Low-Cost Carriers continue to impact your corporate travel program?

Answer	Overall %
Yes	78%
No	22%

In which regions is your company feeling pressure to add more Low-Cost Carriers or non-GDS airlines?

Answer	Overall %
United States	66%
EMEA	34%
Asia	20%
Australia / New Zealand	20%
Canada	20%
South America	17%

Has your company consolidated travel with one travel agency?

Answer	Overall %
North America	86%
EMEA	56%
Globally	50%

Will your company spend less, about the same or more on corporate travel in 2011 compared to 2010?

Answer	Overall %
Less	12%
Same	40%
More	47%

How will travel demand be affected in 2011?

Region	Decrease	Stay the Same	Increase
APAC	4%	42%	54%
Europe	5%	58%	37%
Latin America	9%	54%	37%
Middle East	12%	59%	29%
North America	11%	42%	47%

Reasons for planning to spend less in 2011 on corporate travel (multiple answers allowed):

Answer	Overall %
Fewer trips	67%
Increased policy compliance	67%
Current economic conditions	33%
Increased use of low-cost travel suppliers	17%
Implemented policy for internal (employee-only) meetings	17%
Implemented policy on advance purchase rules (7-day, 14-day,e tc.)	17%
Offset expectation of lower company revenues	17%
Planning less international travel	17%
Travel costs in our company markets are down	17%
Using more negotiated rates	17%
Using more video-conferencing options	17%

When considering cutting costs, what are the three initial areas that are primarily focused on to save money?

	Overall %
Travel Costs	86%
Corporate Meetings	73%
Workforce Reductions	46%
Advertising / Marketing	22%
Employee Benefits	10%
Research & Development	5%
Production / Manufacturing	3%
Other	16%

Please rate the effectiveness of the following methods to reduce company travel costs:

Question	Overall Mean (1-7 scale from least to most effective)
Limit / reduce employee travel	5.42
Adjust travel policies	5.26
Purchase restricted vs. non-restricted airfares	5.10
Use of online booking tool	5.02
Implement better tracking	4.63
Implement collaboration tools, e.g. TelePresence, WebEx	4.32
Reduce hotel rate limit	4.21
Reduce / consolidate suppliers	4.18
Use dynamic / customized messaging on travel site	4.16
Use Pre-Trip Approval	4.02
Implement per diems	3.65
Switch travel providers	2.72

What is the approximate percentage of transactions that comply with company preferred vendors?

Answer	Overall %
% of complying expense tool transactions	97%
% of complying rail transactions	93%
% of complying car rental transactions	89%
% of complying airline transactions	82%
% of complying hotel transactions	70%

Approximately what percentage of your company's total transactions is made by travel arrangers/executive administrators?

Answer	Overall %
<10%	5%
10-20%	28%
21-30%	29%
31-40%	12%
41-50%	9%
>50%	17%

ANALYSIS: In a stark contrast to the previous two years, respondents overwhelmingly changed their tune on how they project their travel budgets to change. Twenty-nine percent indicated spend would increase somewhat and 11 percent said it would increase considerably. A combined 35 percent projected some level of decrease whereas last year this group accounted for 86 percent of responses.

For the fourth year in a row, focusing on travel costs remains the number one area for most companies seeking to reduce overall costs. When it comes to specifically reducing travel costs, the top two responses were once again limiting travel and adjusting travel policies.

Average Online Adoption by Region	
APAC	66%
EMEA	58%
Latin America	67%
North America	78%

Adoption by Industry	
Defense Contractors	90%
Public Sector / Government	87%
Consumer Products	86%
Professional Services (non financial)	79%
Retail	78%
Financial	75%
Manufacturing	73%
Technology / Software	71%
Oil & Gas	69%
Healthcare / Pharmaceuticals	68%
Other	88%

Adoption by Company Air Volume	
<$4.9 M	82%
$5M - $9.9M	76%
$10M - $24.9M	81%
$25M - $49.9M	85%
$50M - $99.9M	75%
>$100M	67%

Adoption by Years on GetThere	
Less than one year	66%
1-2 years	78%
3-4 years	86%
4-5 years	75%
5+ years	78%

ANALYSIS: Companies using GetThere increased their online adoption rates for the tenth consecutive year. Adoption increased in each global region compared to 2009. The average of the 10 companies with the best online adoption rates is 95 percent.

Note: Online adoption is based on reported monthly online bookings as a percentage of total monthly bookings.

Average Online Adoption by Region	2009	2010
APAC	65%	66%
EMEA	51%	58%
Latin America	63%	67%
North America	77%	78%

APAC	Average Adoption
Korea	98%
New Zealand	97%
Hong Kong	83%
Singapore	73%
Japan	66%
Australia	65%
India	53%
China	44%

EMEA	Average Adoption
Austria	85%
Czech Republic	85%
Denmark	85%
Finland	85%
Hungary	85%
Italy	85%
Norway	85%
Poland	85%
Sweden	85%
Belgium	74%
Spain	73%
Germany	67%
The Netherlands	64%
Switzerland	62%
France	57%
United Kingdom	50%

Latin America	Average Adoption
Brazil	56%
Argentina	27%

ANALYSIS: While adoption is up in every global region, some countries saw a slight decline year-over-year in adoption. This trend is a reflection of the increasing number of companies expanding their online travel programs globally.

NOTE: Regional averages are based on the accumulative adoption of every country within the region.

How do you calculate your online adoption rate?

Answer	Overall %
Based on all travel bookings	51%
Excludes some international bookings	16%
Excludes some meetings and group travel bookings	15%
Excludes some non-employee (contractors, recruits, etc.) bookings	10%
Excludes some executive or VIP travel bookings	8%

Which best describes your company's policy regarding mandating the use of online booking?

Answer	Overall %
Have a full online mandate for domestic travel	35%
Not using or considering a full or partial online mandate	31%
Considering a partial online mandate	16%
Have a partial online mandate	16%
Have a global online mandate	8%
Considering a full online mandate	2%
Other (e.g. executive endorsement or charge back)	3%

Is your company using a centralized e-fulfillment center for processing bookings and tickets?

	Overall %
Yes, for all bookings	43%
Yes, for online bookings only	25%
No, but considering this year	2%
Not using or considering	30%

Average Fulfillment Rate	Overall %
Average No-Touch (Touchless) Fulfillment Rate	77%
Average Low-Touch Fulfillment Rate	23%

Most Effective Online Adoption Techniques:

	Overall Mean ((1-7 scale, least to most effective)
Executive support or endorsement	5.73
Full or partial online mandate	5.35
Improving online tool, including adding access to regional content	5.30
Orientation/training sessions (online or in-person)	5.19
Active support from online booking provider	5.18
Active support from travel agency	5.15
Ongoing communications campaign	4.79
Special focus on key groups (arrangers, road warriors, etc.)	4.79
Defined adoption and savings goals	4.48
Chargebacks to travelers or departments	4.32

Booking site features currently in use (multiple answers allowed):

	Currently Using
Travel Arranger Portal	80%
Multiple sub-sites	66%
Unused Ticket Tracking	62%
Dynamic Messaging	57%
Hold Trips	57%
Hotel – Custom Hotel Notes	57%
Portal Registration / Single Sign On	57%
Hotel – Tiered Preferencing	56%
Online Ticket Exchange – Full Refunds / Voids	48%
Super PNR Capabilities	45%
Dining Reservations	42%
Online Ticket Exchange – Exchanges	40%
WebConnect Access	36%
Rail – Amtrak	34%
Traveler Reviews	21%
Ground Transportation (car for hire, limos, taxis)	18%
Rail – European rail providers	18%
Pre-Trip Approval	11%

ANALYSIS: An increasing number of companies are calculating online adoption based on all bookings – and these companies are enjoying a higher adoption average (78 percent) than those that exclude certain types of transactions.

Full mandates continue to become more widespread for domestic travel. Full mandates have risen steadily from 19 percent in 2007 to 35 percent in 2010.

Use of e-fulfillment centers for all bookings is down 13 percent from 2009, although in the case of online bookings only, the number rose by six percent. Average touchless fulfillment rate dipped by three percent vs. 2009.

The most effective technique for driving online adoption continues to be executive support. Since the inception of this survey, it has been consistently cited as one of the top techniques year after year.

Introduced in 2008, the Traveler Arranger Portal remains GetThere's most popular site feature. Coming in second is the use of sub-sites, which allows companies to provide online booking information through GetThere to multiple segments such as regional, non-profiled travelers and divisional sub-sites. Unused Ticket Tracking is new to the survey and used by 62 percent of respondents.

What is the basis of your economic relationship with your primary agency?

	Overall %
Transaction fee	70%
Management fee	11%
Cost-plus	9%
No agency contract	4%
Revenue share	2%
Other	5%

Does your company have a tiered transaction fee structure in place with your primary travel agency?

	Overall %
Yes	92%
No	8%

Has your company realized lower travel agency fees for online bookings in 2010?

	Overall %
Yes	59%
No	41%
Average Online Agency Savings	70%

ANALYSIS: Companies that implemented tiered transaction fees with their travel management firm rose by 11 percent over 2009. Average online agency savings is 70 percent for the second year in a row.

Has your company realized lower airfares for online bookings vs. agency bookings?

Answer	Overall %
Yes	60%
No	40%
Average Airfare Savings – Domestic	18%
Average Airfare Savings – International	24%

ANALYSIS: A majority of respondents realized airfare savings by booking online vs. offline. The 18 percent domestic savings translates to $93 per reported average ticket price (ATP). The 24 percent international savings equates to $715 per reported ATP.

Has your company realized lower hotel rates for online bookings vs. agency bookings?

Answer	Overall %
Yes	34%
No	66%
Average Hotel Savings – Domestic	12%
Average Hotel Savings - International	31%
Revenue share	2%
Other	5%

ANALYSIS: The percentage of respondents realizing lower hotel rates by booking online decreased by seven percent from 2010. The 12 percent domestic savings translates to $18 a night, and the 31 percent international savings translates to $81.

Has your company realized lower car rental rates for online bookings vs. agency bookings?

Answer	Overall %
Yes	22%
No	78%
Average Hotel Savings – Domestic	4%
Average Hotel Savings - International	18%
Revenue share	2%
Other	5%

ANALYSIS: The percentage of respondents realizing lower car rental rates by booking online stayed the same year-over-year. The four percent domestic savings translates to $2 per booking, and the 18 percent international savings equates to $14 per booking.

What percentage of your company's overall tickets issued were voided, refunded or exchanged?

Type	Average %
Voids	6%
Refunds	9%
Exchanges	15%

Has your company been able to negotiate a reduced online fee with your TMC for processing voids, refunds and/or exchanges?

Answer	Overall %
Yes	35%
No	65%

Travel responsibilities included in travel department's realm:

	Overall % (multiple responses allowed)
Consolidate travel agencies	61%
Travel program globalization	58%
Monitor travel security	55%
Identify a single corporate card solution	53%
Add mobile tools for travelers	47%
Integrate meeting travel into overall travel program	47%
Combine online booking with expense management tools	45%
Consider social media integration with travel/meetings program	27%
Evaluate other options over travel, e.g. TelePresence, WebEx	21%
Online leisure booking options for employees	21%
Sustainable travel for carbon neutralization	21%
Other	3%

What major changes to your corporate travel program are you considering this year?

	Overall % (multiple responses allowed)
Review of corporate travel policies	63%
Integrate travel and expense management programs	39%
Consider integrating meetings / events into online booking program	29%
Review of corporate travel agency / fulfillment partner	24%
Consider other modes of collaboration beyond travel, e.g. TelePresence	20%
Review of Global Distribution System (GDS) provider	8%
Outsource online booking site management	2%
Other	10%

ANALYSIS: The numbers are down across the board in terms of travel responsibilities, except for identifying a single corporate card solution and considering how to integrate social media with the travel program. Nevertheless, the percentages still indicate that travel managers have broad roles that touch areas outside of the traditional travel program.

Does your company reimburse your travelers for the following ancillary fees?

	Overall % (multiple responses allowed)
First checked bag fee	95%
Second checked bag fee	46%
On-board food and beverage	53%
On-board Wi-Fi	51%
Preferred seat fee	24%
Blanket and pillow charges	15%
Speedy boarding	15%
On-board entertainment	10%
On-board TV, video, movies	7%

ANALYSIS: While reimbursement for the first checked bag fee is down just two percent from last year, second bag reimbursement saw a 16 percent drop from 2009. On the other hand, reimbursement for on-board food and beverage and Wi-Fi picked up considerably by 13 and 20 percent, respectively.

Company's meeting metrics:

	Overall %
% of company's total travel that is meeting related	26%
% of meeting travel booked online	43%
% of total meetings categorized as ad-hoc (not large corporate events)	39%
% of total meetings planned using an online meeting tool	35%

Company's level of interest in meeting planning tools:

	Overall %
Not interested in online meeting planning tools	33%
Currently using an online meeting planning tool	32%
Evaluated online meeting planning tools in 2010	12%
Will evaluate online meeting planning tools in 2011	12%
Other	12%

Benefits of online meeting tool (multiple responses allowed):

	Overall %
Greater visibility and control over meetings	74%
Increased use of preferred hotels and negotiated discounts	51%
Reduced overall time to book groups	46%
Reduced time tracking RSVPs	44%
Reduced time sending meeting invitations	33%
Savings from increased online adoption	33%
Reduced time searching for meeting locations	28%
Reduced time sending meeting RFPs	26%
Other	10%

ANALYSIS: Online meeting planning is still a focus judging by these numbers, although less so than last year. Thirty-three percent of respondents indicated they will not look at online meeting planning tools this year, which is a 14 percent increase from last year.

Average travel costs – overall (in USD):

Domestic (inside North America)		
Average Ticket Price	Average Hotel Rate	Average Rental Car
$440	$145	$49
International (outside North America)		
Average Ticket Price	Average Hotel Rate	Average Rental Car Rate
$2,270	$223	$68

Average travel costs – by air volume (in USD):

Domestic (inside North America)			
Air Volume	Average Ticket Price	Average Hotel Rate	Average Rental Car Rate
< $4.9 M	$336	$151	$46
$5 M - $9.9 M	$427	$136	$42
$10 M - $24.9 M	$503	$142	$42
$25 M - $49.9 M	$396	$141	$41
$50 M - $99.9 M	$362	$119	$40
>$100 M	$481	$161	$52
International (outside North America)			
Air Volume	Average Ticket Price	Average Hotel Rate	Average Rental Car Rate
< $4.9 M	$1,363	$175	$50
$5 M - $9.9 M	$2,053	$190	$62
$10 M - $24.9 M	$2,572	$175	$69
$25 M - $49.9 M	$2,446	$218	$48
$50 M - $99.9 M	$5,040	$215	$42
>$100 M	$2,115	$237	$70

Average travel costs – by region (in USD):

Domestic (inside North America)			
Region	Average Ticket Price	Average Hotel Rate	Average Rental Car Rate
Mid-Atlantic	$460	$174	$44
Midwest	$430	$123	$39
New York	$478	$193	$46
Northeast	$429	$140	$42
Northwest	$350	$122	$44
South Central	$362	$119	$40
Southeast	$400	$160	$40
Southwest	$443	$134	$69
International (outside North America)			
Company Air Volume	Average Ticket Price	Average Hotel Rate	Average Rental Car Rate
Mid-Atlantic	$1,943	$221	$45
Midwest	$1,658	$176	$49
New York	$2,095	$242	$63
Northeast	$1,892	$190	$39
Northwest	$2,250	n/a	n/a
South Central	$5,040	$215	$42
Southeast	$1,800	$290	n/a
Southwest	$1,927	$186	$69

Average travel costs – by industry (in USD):

Domestic (inside North America)			
Industry	Average Ticket Price	Average Hotel Rate	Average Rental Car Rate
Consumer Products	$431	$124	$46
Defense Contractor	$533	$126	$38
Financial	$425	$160	$45
Government / Public Sector	$477	$119	$58
Healthcare / Pharmaceuticals	$495	$167	$50
Manufacturing	$400	$90	n/a
Oil & Gas	$404	$126	$41
Professional Services (non financial)	$498	$160	$44
Retail	$498	$192	$38
Technology / Software	$394	$125	$43
Other	$416	$143	$61
International (outside North America)			
Industry	Average Ticket Price	Average Hotel Rate	Average Rental Car Rate
Consumer Products	$2,670	$209	$69
Defense Contractor	$2,554	$212	$79
Financial	$3,328	$216	$69
Government / Public Sector	$1,279	$450	$100
Healthcare / Pharmaceuticals	$3,283	$244	$71
Manufacturing	n/a	$120	$150
Oil & Gas	$3,363	$208	$42
Professional Services (non financial)	$2,085	$240	$56
Retail	$2,275	$200	n/a
Technology / Software	$1,175	$180	$55
Other	$1,922	$186	$49

Does your company currently utilize an expense management tool?

	Overall %
Yes	74%
No, but currently evaluating options	11%
No, and don't have plans to evaluate in 2011	15%

Which expense management tool does your company currently use or is evaluating?

Tool	Overall %
Concur	26%
PeopleSoft / Oracle	23%
IBM	15%
SAP	13%
Extensity (Infor)	4%
Other	19%

How interested is your company in expense management integration with travel management systems?

Level of Interest (1-7 scale)	Overall %
1 – Not Interested	33%
2	13%
3	4%
4 – Interested	19%
5	2%
6	8%
7 – Extremely Interested	21%

Does your company have a mandated credit card program?

Answer	Overall %
Yes	77%
No	23%

Which credit card program does your company use?

Program	Overall %
American Express	56%
MasterCard	19%
Visa	18%
Diner's Club	4%
Other	4%

What are the main mobile objectives for your travel program? Rank in order of importance with 1 being the most important.

Objective	Highest Importance
Obtaining flight information (e.g. gates, delays, times, check-in)	1
Booking flights	2
Booking hotels	3
Booking car / rail	4
Rebooking on day of travel due to cancellations / delays	5
Flight check-in	6
Hotel check-in	7

Has your company implemented or considered incorporating green initiatives such as carbon footprint information into your travel program?

Answer	Overall %
Yes	32%
No	68%

ANALYSIS: Mobile is one of the hottest topics in corporate travel this year, and for the second straight year, respondents ranked obtaining flight information as the most important feature of a mobile solution. Booking flights was ranked as the second most important feature and booking hotels third, and the industry is responding in kind. GetThere released GetThere Mobile with hotel shop and book capabilities in the second quarter of 2011 and plans to release air shop and book late in the year.