

RUNAWAY RUNWAYS

UK airports have the runway capacity to be handling 540 million passengers per annum (mppa) by 2050, compared with the 372m they processed in 2008, according to latest Department for Transport forecasts. All but 7m of the 168m extras passengers could be handled by regional airports – with the exception of Luton, London's gateways are full – provided additional terminal capacity is made available and Plymouth and Coventry are re-opened.

AIRPORT	mppa 2008	mppa 2050
LONDON AIRPORTS		
Heathrow	86	86
Gatwick	42	42
Stansted	35	35
Luton	10	17
London City	8	8
LONDON TOTAL	181	188
REGIONAL AIRPORTS		
Aberdeen	5	10
Belfast International	10	23
Belfast City	4	4
Birmingham	18	27
Bournemouth	2	6
Bristol	7	12
Cardiff	12	12
East Midlands	25	25
Edinburgh	20	20
Exeter	2	12
Glasgow	12	20
Humberside	1	12
Inverness	1	8
Leeds/Bradford	5	12
Liverpool	12	20
Manchester	30	56
Newcastle	6	20
Newquay	1	3
Norwich	2	3
Plymouth	1	4
Southampton	5	7
Teesside	3	10
Blackpool	3	8
Coventry	0	2
Doncaster Sheffield	2	2
Prestwick	3	15
REGIONAL TOTAL	191	352
NATIONAL TOTAL	372	540

Source: Department for Transport

US\$1,009,008,000

Anticipated global spend on business travel by year-end 2011, against US\$924bn in 2010.

5.4% per annum

Anticipated increase in UK spend on business travel over the next five years, against 3.8% per annum in the US, 3.3% in France and 2.9% in Germany.

11.2% per annum

Anticipated increase in China's spend on business travel over the next five years, against 10.8% per annum in India, 7.1% in Russia and 7% in Brazil.

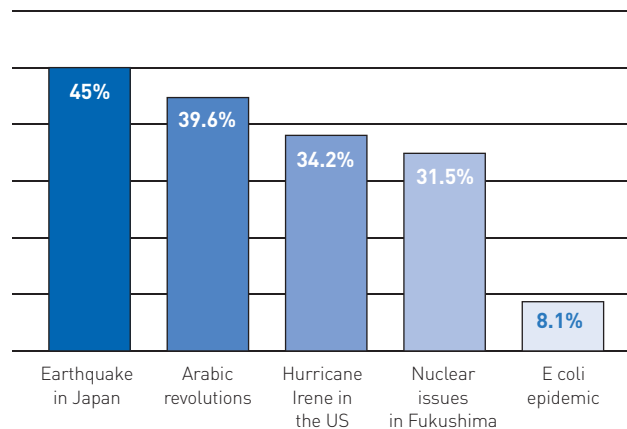
Source: GBTA Foundation

76,151

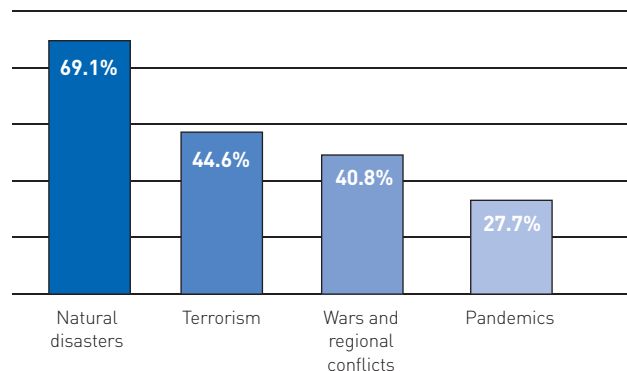
The number of car hire transactions recorded by Guild of Travel Management Companies (GTMC) members during the third quarter (to September) of 2011. This figure is a 16% increase on the same quarter in 2010.

Source: GTMC

ACTE/KDS STUDY 2011: IMPACT OF GLOBAL EVENTS – HAVE YOU HAD TO RE-SCHEDULE OR CANCEL A TRIP FOR THESE REASONS?



TRAVEL BUYERS WHO THINK THESE ISSUES WILL WILL HAVE AN INCREASING IMPACT IN THE FUTURE



INTERNATIONAL AIRLINES GROUP (BA/Iberia) January-September performance

	2010	2011	+/-
PASSENGERS (THOUSANDS)			
Domestic UK and Spain	9,413	8,281	-12%
Europe	16,121	17,167	+6.5%
North America	5,421	6,071	+12%
Latin America	3,194	3,601	+12.7%
Africa/Mid-East/India	3,148	3,093	-1.7%
Asia-Pacific	1,028	1,149	+11.8%
TOTAL	38,325	39,362	+2.7%
RPKS (MILLIONS)			
Domestic UK and Spain	5,837	5,149	-11.8%
Europe	20,457	21,299	+4.1%
North America	36,271	40,799	+12.5%
Latin America	26,283	29,611	+12.7%
Africa/Mid-East/India	18,624	18,801	+1%
Asia-Pacific	10,646	11,766	+10.5%
TOTAL	118,118	127,425	+7.9%
ASKS (MILLIONS)			
Domestic UK and Spain	8,006	7,000	-12.6%
Europe	27,345	28,349	+3.7%
North America	44,423	49,811	+12.1%
Latin America	30,945	35,474	+14.6%
Africa/Mid-East/India	25,055	24,939	-0.5%
Asia-Pacific	12,926	14,631	+13.2%
TOTAL	148,700	160,204	+7.7%
LOAD FACTOR (%)			
Domestic UK and Spain	72.9	73.6	+0.7pts
Europe	74.8	75.1	+0.3pts
North America	81.6	81.9	+0.3pts
Latin America	84.9	83.5	-1.4pts
Africa/Mid-East/India	74.3	75.4	+1.1pts
Asia-Pacific	82.4	80.4	-2pts
OVERALL	79.4	79.5	+0.1pts

Source: International Airlines Group

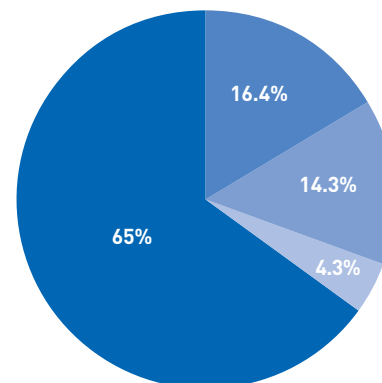
22nd...

occasion that Amsterdam Schiphol airport has been voted Best Airport in Europe by readers of Business Traveller. This year it headed a list that included London Heathrow, Munich and Zurich.

97%

On-time departures from London City airport for British Airways' twice-daily all-business class service to New York since its introduction two years ago.

RECOGNITION OF THE COMPANY'S SUSTAINABLE DEVELOPMENT POLICY IN THE ONLINE RESERVATION TOOL



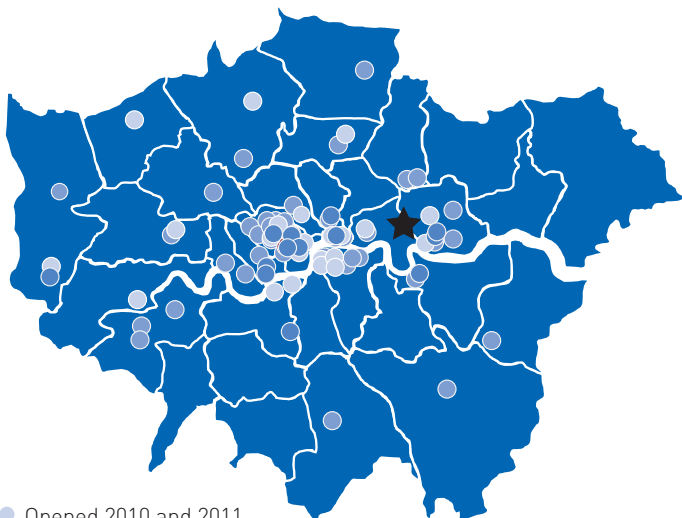
- Non-applicable
- Yes, with an online carbon calculator
- Yes, with travel avoidance alternatives (phone and video meetings)
- Yes, with rules suggesting lower emission options

Source: ACTE/KDS study 2011

	Q1/12	Q2/12	Q3/12 (low)	Q3/12 (mid)	Q3/12 (high)	Q4/12
LONDON						
Occupancy (%)	76	83.6	91.9	91.9	91.9	83
Average rate (£)	123.79	131.47	146.60	156.20	182.58	130.75
RevPAR (£)	94.13	109.88	134.78	143.60	167.86	108.51
PROVINCES						
Occupancy (%)	64.5	74.3		81.8		70.4
Average rate (£)	57.22	59.40		64.23		60.04
RevPAR (£)	36.90	44.12		52.53		42.25
UK TOTAL						
Occupancy (%)	68.5	76.7	84.4	84.4	84.4	73.6
Average rate (£)	77.22	81.06	88.98	91.87	99.80	81.29
RevPAR (£)	52.11	62.16	75.11	77.55	84.24	59.86

Note: Q3/12 low, mid and high split dependent on number of visitors to Olympic Games
Source: PwC Hospitality Directions Europe

CAPITAL GAINS – NEW HOTELS IN LONDON



- Opened 2010 and 2011
- 2011 opening
- 2012 opening
- ★ Olympic Park

RECENTLY OPENED

2010 and 2011

Travelodge
Renaissance St Pancras
Indigo Tower Hill
Mint
Premier Inn Hangar Lane
Costello Place
Eurotraveller
Holiday Inn Express Heathrow
Waldorf Astoria
Park Plaza
The Tune
Holiday Inn Express Stratford
Forestgate
H10 Waterloo
Travelodge Waterloo
Town House
Verta
Pestana
Four Seasons
W Hotel
St John Hotel
Corinthia London
St Ermin's
The Savoy

UNDER CONSTRUCTION

2011 OPENING

45 Park Lane
London Edition
Intercontinental
Ecclestone Square
Park Inn Excel
Adria Hotel
The Belgraves
Premier Inn Islington
Hilton Heathrow
Holiday Inn Express Greenwich
Travelodge City
Aloft

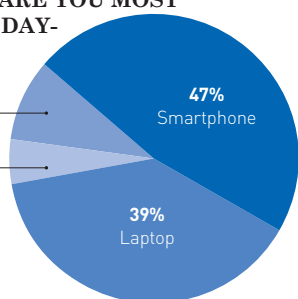
2012 OPENING

Travelodge Cricklewood
Travelodge Sidcup
Hilton Wembley Stadium
Travelodge Bromley
Great Northern King's Cross
Apex Temple Court
Indigo
Hampton by Hilton
Premier Inn Ealing
Travelodge Edmonton
Travelodge Greenwich
Holiday Inn Express Earl's Court
Ibis West Kensington
Premier Inn Hillingdon
South Place Islington
Kensington Close (ext)
Premier Inn Waterloo
Premier Inn Stratford
Yorkshire Grey
Travelodge Balham
Travelodge Stratford
Travelodge Twickenham
Travelodge Teddington
Premier Inn Richmond
Shangri-La at The Shard
Citizen M
Hilton Southwark
Premier Inn Southwark
Staybridge Suites
Stratford City
Manchester Square Hotel
The Wellesley
ME by Melia
Quadrant
Firmdale
Bulgari
The Brewery
Trocadero
Balderton Road
Boutique Hotel
Premier Inn Leicester Square

ETHERLIVE SURVEY OF EVENTS INDUSTRY PROFESSIONALS

ON WHICH FORMS OF COMMUNICATIONS TECHNOLOGY ARE YOU MOST RELIANT ON A DAY-TO-DAY BASIS?

- 9% Office telephone
- 9% Other
- 0% Tablet



HOW MUCH HAS TECHNOLOGY BEEN AN INCREASING INFLUENCE ON YOUR SECTOR OF LIVE EVENTS OVER THE PAST DECADE?

- 15% A little
- 1% None at all

