

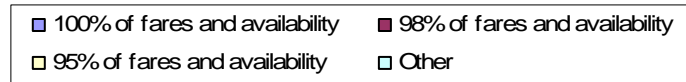
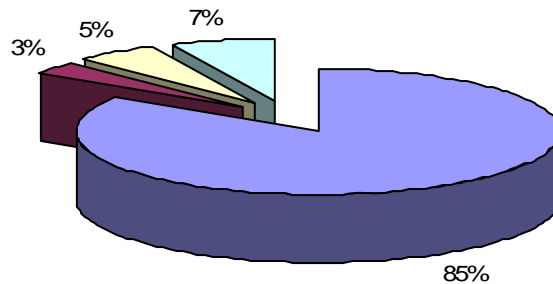


December 2006 Survey Results "What does full content mean to you?"

1. What does full content mean to you?

- | | |
|--|-----|
| A. Full content means that all public airfares (including internet) and corresponding availability are accurately reflected in the GDS 100% of the time. | 169 |
| B. Full content means that all public airfares (including internet) and corresponding availability are accurately reflected in the GDS 98% of the time. | 7 |
| C. Full content means that all public airfares (including internet) and corresponding availability are accurately reflected in the GDS 95% of the time. | 11 |
| D. Other (please specify) | 14 |

What Does Full Content mean to you?



Comments from Questions 1:

- (answer A) plus trains in Europe
- Also need the corporate negotiated fares included
- Full content means all public airfares and corresponding availability are accurately reflected in the GDS 100% of the time as well as all airfares airlines choose to send to targeting frequent fliers are accurately reflected in the GDS 100% of the time.
- Full content means whatever the airline wants to load into the GDS at any given time, different than the fares being offered to frequent flyer members directly and/or other promotional discounts.
- Full content with regards to corporate business travel. I don't need the cruises and so many of the other features that the GDS's have incorporated.
- I hope that is what the airlines define as full content.
- I really do not know meaning.
- Including any negotiated carrier airfares with corresponding rules.

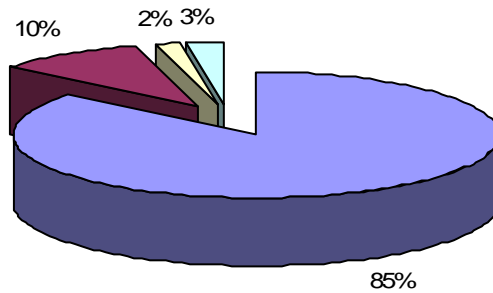


- Including Low Cost Carriers & online travel agencies like for example Opodo & Expedia.
- It means that you could also find all your hotel and car rental fares and rates negotiated as well as public including internet.
- It would be a + fare sheets which are very popular still in APA.
- Less than 95% if the truth be told.
- Some carriers are not loading all their web fares in the GDS. While I would like (A) to be the correct response, in my mind I think it will be more like (C) in real world terms.

2. Do you believe that all four GDS's should have the same airfares and corresponding availability?

A. Yes	169
B. No	20
C. Don't know	3
D. Not sure	5

Should all GDS's have the same airfares?



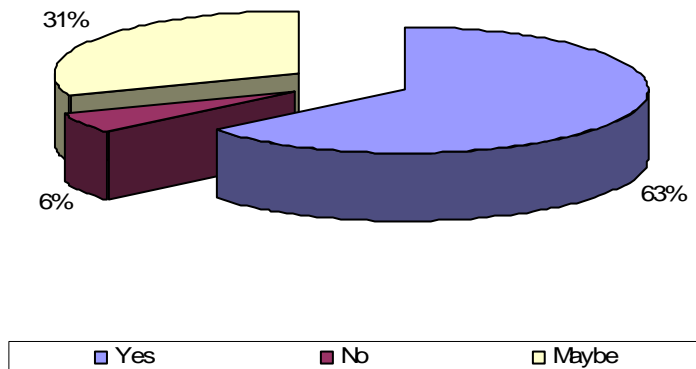
■ Yes	■ No	■ Don't know	■ Not sure
-------	------	--------------	------------



3. Is understanding and verifying full content going to be a priority for you in 2007?

- A. Yes 125
- B. No 11
- C. Maybe 60

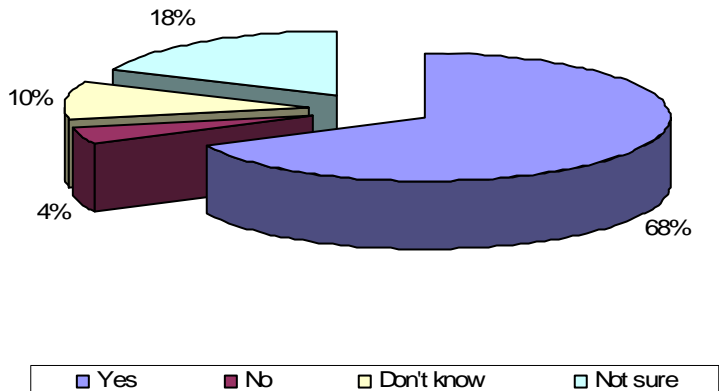
Is full content going to be a priority in 2007?



4. Do you find it beneficial for a company like Topaz International to do GDS comparisons for you?

- A. Yes 133
- B. No 8
- C. Don't know 20
- D. Not sure 36

Are GDS comparisons beneficial?





Additional Comments from the Survey:

- With so much that is changing in the industry, it is so unclear what direction one is to go for travel companies, online booking, GDS, direct connect, or what.
- All GDS's should have full content - presuming that all carriers sign with all the GDS's. It is conceivable that not all carriers will sign with all the GDS's.
- Access to content is a critical issue facing our industry today. How travelers get to that content directly impacts a corporate travel program's effectiveness and supplier compliance.
- As long as the airlines continue to offer lower fares through other avenues, they are compromising the integrity of their corporate agreements.
- Agency preferencing of the GDS in order for them to 'punish' the suppliers who don't pay their Preferred Supplier fees. The mega agencies doing this are in my opinion, extorting 'protection' money like the Mafia. I am very concerned that the ability of agencies to preference the GDS to favor their Preferred Suppliers can and do affect a corporations Preferred Suppliers when these suppliers are not the agency's preferred suppliers.
- Companies are aware of, but have limited access to, the 'back room' business dealings between the airlines, GDS, and travel agencies. Each time one of these suppliers cost or profitability gets out of balance, the company can expect another cost increase with minimal defense. Partnership, trust, commitment, loyalty lose their meaning in business.
- Everyone was asking for the definition of 'full content' and until you pressed the airlines for a response, it was not available. The airline's FULL or entire inventory should be available to all agencies.
- One of the drawbacks in smaller territories is that the full range of GDS products is not always available; it may be a GDS problem or a TMC inability to supply the full range of products or a combination of both. For the GDS to have meaning for travel buyers, full content including web fares, corporate passes, menu driven options should all be accessible. GDS's have to treat all airlines/rail companies equally or they will start to lose companies and give travel buyers the incentive to use other sources.
- This subject needs to be revisited, however I doubt that will happen as the TMCs for the most part are getting their costs covered by the corporate clients. Neither the airlines or TMCs lost in this deal. The corporate clients were the ones who lost incurring higher costs.
- Full Content should come without additional charges, whether or not waived or reduced by TMCs.
- Do not forget to mention Data privacy and Data ownership in regard to the possibility of using data for statistics and negotiations.
- I question whether the airlines include all fares in the GDS, however hold back inventory on the fares.
- I don't believe that my understanding of full content is the airline/GDS interpretation of full content. They always seem to find a loophole.
- I remain troubled about the current changes. As we the users attempt to run our travel programs I would like to not have unclear GDS content issues to add to my list of items of concerns. It is hard enough to pick TMCs to work with. To add GDS issues just makes the job that much more demanding.



- I guess because there is such fluidity in what is available at any time, I am not sure a comparison is really that valuable. I would like to think that 'full content' is available, but again, I don't know how accurate a comparison can be, and if I find out I am not getting full content, am I going to make a change to get it? I sometimes think there is more hype than value to some of the issues. Or maybe, I am not fully informed.
- It will be very beneficial for the continued good will of the industry if the airlines, GDS, and agencies make clear their financial arrangements since the customer is now paying a higher agency fee while the airline discounts are dwindling. It all seems very convenient for all vendors involved while the solution is very murky to the buyers. I imagine that, with the change of ownership in Sabre and Worldspan we are going to have to go through the GDS fee exercise again. Will they have a fee reduction war? Will business travelers ever have access to full content? I believe airlines SHOULD provide full content to all GDS services, and I assume that's what you mean in question #2. If the question was do I believe that when you check availability we'll find it the same in all, the answer is no. Fragmented availability is a serious challenge for corporate travel managers - it's as if the airline industry is deliberately undermining our attempts to manage our travelers.
- I want to add that I feel they 'should' have the same airfares and corresponding availability. It's possible that carriers hide behind the statement 'fares are loaded at the GDS's at different times'. The carrier has an agenda when deciding which GDS gets the load first, don't they? I wonder if there is a control to determine if there is more than one version.
- Full content would make each travel manager's job much more easy !!!
- Go get 'em!!
- I would expect all four GDS's to have the same content. If one or more is weak in this regard, business will slip away from them.
- I think GDS's are a dying breed, and that the Internet will become the booking tool of preference worldwide.
- I would describe full content within the GDS as its ability to provide a 0% risk factor of our corporate traveler's ability to obtain lower airfares, hotels and rental rates from other distribution sources.
- I think it is also important to mention that full content also means having access to availability, ticketing and fares for new carrier entrants and smaller African/Chinese/South American carriers.
- Corporations should also enforce this by adding contractual clauses with their contracted suppliers.
- I think the article should compare airline's direct access content. Especially airlines in Japan for domestic travelers.
- How does American Express Travelbond bypass the GDS and yet guarantee all their content?
- Currently the only Airline I have found 'Full Content' discrepancies is with AirTran.
- I'd like to see some kind of audit system to verify that all content is in the GDS systems as advertised. We've had some issues with various carriers' content not being in Sabre as advertised.
- Is there a list of the GDS Systems ranking as they stand now on full content? We all know that it's a changing world but this information could sway a company on selection of a GDS system.



- My priority for next year will include determining how our travelers will receive the following: Lowest Fare Length of trip (connection vs. non-stop). Using more of the LCC, for example Southwest Airlines into Chicago, Midway Airport. What system and or GDS will provide the information in a user friendly format. I will also look at additional services provided by the GDS, another on-line booking tool, and how they will provide our travelers with up to the minute notifications on schedule changes and information on flight status. Prior to deregulation of the GDS systems I don't believe we were receiving full content from all the major airlines. I believe seats for sale were held back for travelers with high frequent flyer status ad airlines wanted to see if they could sell seats at a higher price. Consistency between GDS systems was sometimes different as far as class of service availability. What may be available in one GDS system was not available in another GDS system. Seasoned travel agents, I believe were able to find ways around the system. Today, we are still faced with are we really receiving full content? One of the biggest differences, the airfare is not guaranteed for 24 hours only the seat. Allowing the airlines to control more of the inventory, by raising the fare or lowering the fare depending on the matrix they are working from. My hope is to see the low cost carriers begin to compete and show their airfares in the GDS. I would welcome the LCC to provide a link to their website (corporate link) and our travelers can make reservations directly. Reports are created for the travel manager and we still know where the travelers are in an emergency. The legacy carriers are faced with competitive pressures to drive the consumer to their 'own' website. Because it's not their money they are spending, they want frequent flyer miles and/or their elite status (the consumer) is willing to pay more. Keep in mind, for Private Higher Education Institutions we can only strongly encourage or recommend following travel guidelines. Faculty will do what they want. I can make a strong case as to why you want to use our preferred airlines, i.e. know where are travelers are in an emergency, bottom line savings to the institution. If Topaz is able to perform an audit on showing who is offering full content and help us educate our travelers as to what is really going on I will help as much as possible.
- In Canada, Air Canada does not provide full content, in fact their lowest fare levels Tango and three classes of service in Latitude are not available in the GDS. According to AC, this is because the GDS does not offer the opportunity of deconstructing the fares (i.e. charge for seat selection, discount for no baggage). I understand that other airlines are looking at this experiment. If successful, it could lead to another round of distribution woes much like we are currently experiencing here in Canada. It is increasingly difficult for corporate travel departments to prove their value as suppliers undermine us with special fares for direct traveler purchases. My company wants assurance that we are providing the best value for all travel transactions. Perception is turning, as our travelers continue to surface lower fares than are posted on the GDS.
- I'm not pushing for re-regulation, but in a deregulated environment, the rules can change so frequently that it almost isn't worth making such a big deal about. Now it's the competitive marketplace, not government regulation that drives what is available. Buyers can yell, scream and jump up and down for what they want, but unless one of the GDS's will provide it, none of them will have to.
- Make it easier to understand both by the traveler, management and the travel manager.
- Only results from an impartial third party, like Topaz, could be trusted. However, I'm not sure what we would do with that information since we are locked-in to our current GDS.
- Measuring full content is going to be a difficult task but since my company is getting charged an additional fee for 'Full Content' we want to make sure we are getting value.
- Please talk about using various GDS's within a TMC managed travel program. Why should I be concerned which GDS is provided by my TMC?



- Thank you for taking up the challenge to unravel the GDS issue.
- Thanks for looking into this!
- The definition of full content to the customer and what the airline does from time to time is not always the same! There are still fares not being loaded in the GDS.
- The efficiencies associated with using a self booking tool can only be maximized if full content is available from one source.
- This is an ongoing issue for us. While we may expect full content 100% of the time, reality says that doesn't exist...internet sites, such as Travelocity, Cheap Tickets, Expedia, etc. still post available fares that are not available via the GDS. However, your question is what does 'full content' mean to us? Either it's full content or it's not. Anything less than 100% isn't 'full', it's partial. So my answer, although I certainly know it's not, is 100%.
- We would expect our Travel Managers as part of their Service Level Agreement to confirm their GDS fare level access and this 'guarantee' would be included in their contract, so that our contract supported their GDS selection process. We are in the \$16 million airline spend category.
- Traveler perception weighs heavier than foregone savings when assessing Internet fares which are on the whole more expensive than managed travel programs. For this reason it cannot be ignored.
- Travel Agency and online booking tool suppliers' ability to find 100% full content, which is seamless to the customer, will be essential in 2007 and beyond.
- Topaz is a Wonderful Company that the Travel Industry can rely on for their honest and unbiased results.
- Would like to know how the major GDS' stack up against the newer distribution systems just rolled out. Are they for real?
- Unless a company is consolidated with one GDS globally it is necessary to have full content in all GDS's. We are making the GDS a requirement in our RFP that we would do with agencies, but whatever GDS would have to have all the airlines in it to be selected.
- Very complicated and shifting sands daily, not global. Just as folk used to book in different pseudo cities for revenue hurdles, they may end up doing the same for GDS content costs. There is no universality here.
- When researching claims of lower fare than we can offer thru our online booking tool we find that the fares and availability are changing so frequently we cannot do an accurate comparison. Airlines, while claiming full content, still appear to list fares on their websites that are not available on the GDS's.
- You have to realize that the hotel part of business travel is becoming much more complicated and that new technology has to focus on that part as well. In Europe many times the hotel spend is higher than the airfare.
- While I define 'full content' as meaning all public fares and availability 100% of the time, I have no doubt that this is not the case, even when so claimed. Travel Managers and GDS marketing are not on the same page with the definition. I believe despite our desire and intent to see all, that we are all receiving filtered information to some extent, regardless of the GDS.
- Your services have certainly been of great benefit to us. Your previous audits have been thorough and extremely informative as to benchmarking and best practices recommendations. Your review of our travel operations have solidified our corporate travel program and helped me in directing the company toward travel globalization with our current travel services provider – CWT.
- Would like to see a consistent definition of full content used by all. There may be full content, but timing of when the fares are available in the GDS (vs. on an internet site) is more the issue.