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JAY CAMPBELL

Editorial Director
(646) 380-6263
jcampbell@thebtngroup.com

CHRIS DAVIS

Executive Managing Editor
(646) 380-6252
cdavis@thebtngroup.com

DAVID JONAS

Executive Editor
(203) 797-8289
djonas@thebtngroup.com

MARY ANN McNULTY

Executive Editor, Payment & Expense
(630) 519-4510
mmculty@thebtngroup.com

JAY BOEHMER

Senior Editor, Transportation
(646) 380-6249
jboehmer@thebtngroup.com

MICHAEL B. BAKER

Senior Editor, Lodging
(646) 380-6250
mbaker@thebtngroup.com

LAUREN DARSON

Associate Editor, Government
(646) 380-6264
ldarson@thebtngroup.com

JONATHAN CHAN

Art Director
(646) 380-6248
jchan@thebtngroup.com

LISA GONZALES

Production Specialist

MICHELE GARTH

Production Manager

SUBSCRIPTION SERVICES

Tel: (847) 559-7533
Toll Free: (800) 697-8859
Fax: (847) 291-4816
Business Travel News
PO Box 3610
Northbrook, IL 60065-3610
(nbtng@omeda.com)

LIST RENTAL/POSTAL INFORMATION

AUDRA AMOROSI, MeritDirect, LLC
333 Westchester Ave
White Plains, NY 10604
(914) 368-1064 direct
(914) 368-1147 fax
aamorosi@meritdirect.com

E-MAIL INFORMATION

WAYNE NAGROWSKI
(845) 731-3854

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The YGS Group
(800) 501-9571
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EDITORIAL & SALES OFFICES

116 W. 32nd St., 14th Floor
New York, NY 10001
Editorial Fax: (646) 380-6241



100 Lighting Way, 2nd Floor
Secaucus, NJ 07094
www.northstartravelmedia.com

Spending And Program Complexity Increasing For The Biggest Buyers

BY DAVID JONAS

Like most corporate travel programs, the very largest are in a period of growth, driven by corporate profitability and an ongoing pursuit of incremental revenue. Coinciding with travel price inflation, such growth translates to higher spending, which in turn prompts greater scrutiny of that spending. As a result, big organizations are leaning on their travel management companies to uncover savings opportunities and apply technology to further optimize their travel programs.

Nearly all reported T&E and air volumes showed continued spending growth in 2011, but at a pace slower than last year's. Among 64 companies spending at least \$30 million in U.S. booked air volume—most of which are represented here in the 2011 *Business Travel News* Corporate Travel 100—total U.S. T&E last year jumped on average by 19 percent over 2009 levels. This year, the average annual increase is projected at about 6 percent. On a global level, T&E among surveyed organizations soared 20 percent on average in 2010, and is projected to increase this year by another 5 percent.

Similar trends are observed specifically for net booked air volumes, both at the U.S. point of sale and globally. The exception is Europe, where surveyed companies last year on average increased air volume by 22 percent but this year expect an average retreat of 3 percent.

Overall so far in 2011, “we have been up about 5 percent to 10 percent [in transaction volume] over 2010,” said Mike Janssen, BCD Travel Americas president. “Larger clients expect a slowdown to happen

in the fourth quarter. They are taking some actions now, but most are continuing to spend but expect to put the brakes on a little heavier starting in the fourth quarter this year. My expectation that the 5 to 10 percent growth over last year is probably going to go to flat, maybe slightly below last year.”

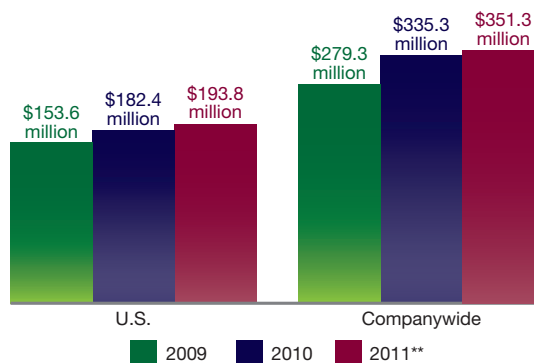
Pedro Paredes, American Express Global Business Travel vice president of client solutions, this year has observed what he called a “re-evaluation” of travel spending, a far cry from

the severe across-the-board cuts from 2008 and 2009. “As [travel] prices are going up, the C-level is getting a little concerned,” he said. “Customers are asking, ‘How can we maximize T&E budgets?’ They are looking for strategies to push the buck further and optimize that spend.”

According to Janssen, prioritizing optimization also has meant clients are investing in strategic aspects of their programs. “When you looked at things like technologies and

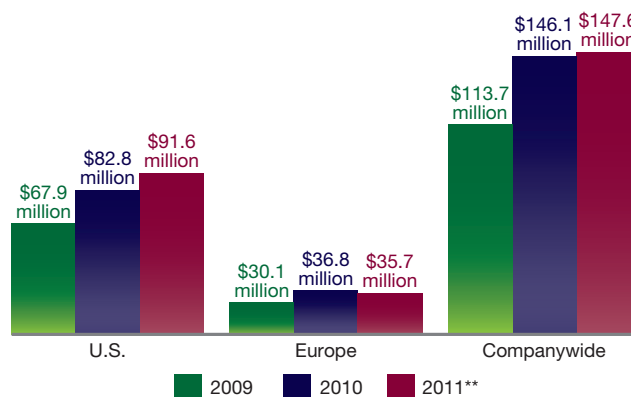
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Average T&E Volume*



* Total dollars paid by travelers, net of commissions and refunds, including air, hotel, ground transportation, taxes and fees and ancillary items, including meals and parking
** Forecast

Average Net Booked Air Volume*



* Total dollars net of commissions and refunds, including taxes and fees
** Forecast

TIM REID, Vice President & Group Publisher
(646) 380-6262, treid@thebtngroup.com

LOUIS MAGLIARO, Publisher
(973) 769-0028, lmagliaro@thebtngroup.com

EDIE GARFINKLE, Advertising Director
Tel: (805) 383-1326 Fax: (805) 832-6676
egarfinkle@thebtngroup.com

ANTHONY CARNEVALE, Advertising Director
(201) 902-1976, acarnevale@thebtngroup.com

DAVID MEYER, Director, Research & Media Strategy
(646) 380-6246, dmeyer@thebtngroup.com

ELIZABETH WEST, Group Director, Custom Content
(732) 494-1955, ewest@ntnllc.com

STAN ITZKOWITZ, Group Marketing Director
(201) 902-1917, sitzkowitz@thebtngroup.com

PAUL GUTCHES, Technical Product Specialist
(575) 613-0968, pgutches@thebtngroup.com

Canada

CYNDY FLEMING, Publicitas APR
Tel: (416) 363-1388 Fax: (416) 363-2889

Mexico

Juan Martinez Dugay,
Paloma Martinez

(011) 52-55 2122-3900

TOWMAR

jmdugay@towmar.com
pmartinez@towmar.com

Japan

HIROKO KUJIME, Pacific Business Inc.
Tel: 81-3-3661-6138 Fax: 81-3-3661-6139

Korea

JUNG WON SUH, Singesi Media
Tel: 82-2-3275-5969 Fax: 82-2-785-8225

Malaysia/Philippines/Thailand

ANNIE BLANCHARD

Tel: 632-646-2497 Fax: 632-647-1853

Singapore

LAVERDER TAN, A1 Media

Tel: 65-6469-9321 Fax: 65-6469-8028



100 Lighting Way, 2nd Floor
Secaucus, NJ 07094
www.northstartravelmedia.com

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United is delighted to partner with *Business Travel News* for this year's Corporate Travel 100 issue. As we all look at ways to improve business travel, we welcome you to meet the new United.

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consulting, that is not where the money was being spent,” said Janssen. “Now it is being spent in those areas again.”

Technologies drawing interest among larger clients include pre-trip auditing, policy compliance tools, streamlined exception processes and other automation. The idea is to uncover savings after bookings but before trips commence, by switching to lower fares or rates and/or moving travelers from non-preferred suppliers to preferred ones.

“Clients are looking to get data in a more real-time fashion that allows them to drive greater compliance to their program and determine if the traveler should even go,” Janssen said, noting both an emphasis on business travel’s return on investment—i.e. focusing on revenue-generating trips and cutting other types—and attention to traveler safety when trips are planned to high-risk destinations.

Consulting Strategies principal Mark Walton said program management technologies meant to enforce policy and improve behavior “have not been as readily available, especially on a multinational basis. But they are getting better and used more. It’s a newer area, and clients are starting to

look at this more carefully.”

In terms of risk management, “the expectations today on a global basis are very hard on a TMC,” said BCD’s Janssen. “We have continued to evolve our travel risk services. It’s a changing expectation on what clients need from us: A to Z on emergency services. Large organizations have changed their focus and want to make sure it’s far more robust than it used to be, and they are willing to pay for that if they see the differentiation in service.”

A recent GBTA Foundation/Egencia study found that the largest corporate travel buyers are more likely than smaller ones to proactively address emergencies. Conducted between April 20 and May 7 among 651 GBTA direct members and Egencia corporate customers and prospects, the study included 104 responses representing organizations with an annual travel spend of \$50 million or above. Among those, 92 percent indicated they have emergency plans in place. That compared to 73 percent of respondents representing organizations annually spending between \$10 million and \$50 million on travel, and 59 percent spending between \$1 million and \$10 million.

Global TMC Deals: The Devil Is In The Details

While data backs up the notion that the larger an organization’s spending volume, the more likely it will have a single, consolidated TMC—within the United States and/or around the world—trends in how those organizations contract for TMCs and establish service configurations are less clear. Few generalizations can be made, but it is apparent that agency relationships—everything from initial RFPs through program implementation—are becoming more complex.

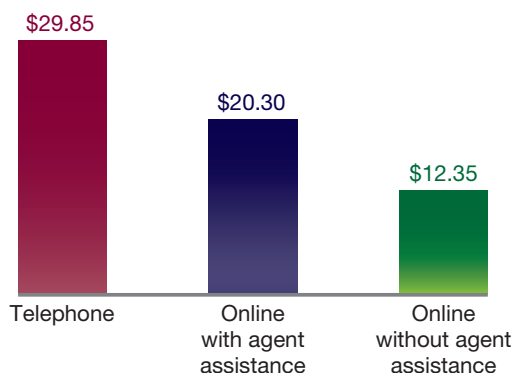
“We see a lot more front-end homework done in configuration, in assignment of people, in due diligence around who is going to work on the account,” said TCG Consulting managing director Albert Taras. He added that service-level agreements, while “core” to an agency deal, are changing to reflect a more sophisticated approach.

Walton agreed, noting how accountability has become a more important consideration, from both a service perspective (often covered by an SLA) and a savings perspective (often cov-

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Gross Per-Booking Fees*

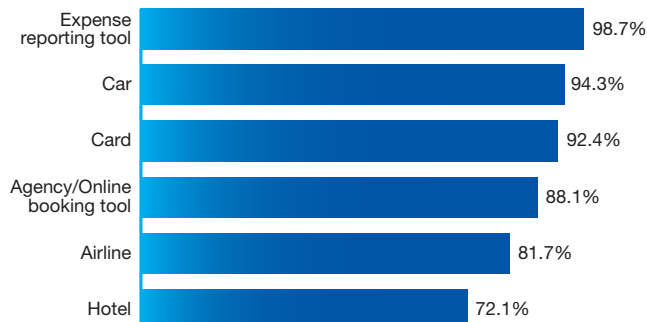
Calculated Averages



* For an air or rail ticket issued in 2010, including operating expenses and indirect costs, accounting for overhead and profit paid to the agency (total paid divided by the number of tickets and refunds issued)

Percent Of 2010 Transactions That Complied With Preferred Vendor Policies

Calculated Averages



Buyers' View Of Vendor Attitudes On Negotiating Favorable Pricing Agreements*

	More Receptive	No Change	Less Receptive	Don't Know/NA
Airline	26%	33%	36%	5%
Hotel	15%	30%	50%	5%
Car rental	46%	33%	12%	10%
Chauffeured car	35%	28%	10%	27%
Agency	32%	43%	3%	22%
Card	31%	41%	2%	26%

* Mid-2011 versus mid-2010 for U.S. points of sale

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ered by a savings agreement). “Companies are going to their TMCs with a charge to help them save,” Walton said. “The relationship has to be defined. Almost every company has a different definition of what savings really is and what cost avoidance really is.

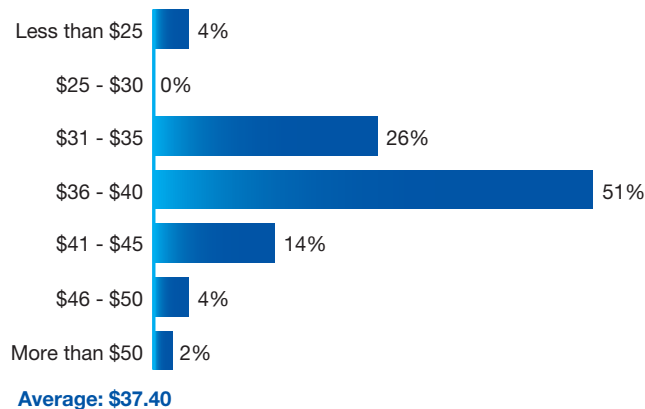
“TMCs are really trying to stress reward and penalty versus just penalty,” Walton continued. “Some companies are more accepting of that on the savings side than on the service side. On the savings side, these agreements are becoming more difficult to put together. It’s harder to achieve hard-dollar savings today.”

TMC executives corroborated that SLAs have evolved and become more detailed. “You’ll still have the customer satisfaction metrics on operations, but you will also find ways to make sure you are holding each other accountable,” said Amex’s Paredes. “Especially if they are outsourcing roles to you, the customer wants to make sure they are getting bang for their buck, and they’ll add metrics toward savings, online adoption and specifics related to their business objectives over the short to medium term.”

Said Janssen, “It’s not just telephony statistics, but online services and how that online reservation is going to be serviced when there needs to be human interaction, how there is going to be in-country service and how there is going to be compliance.

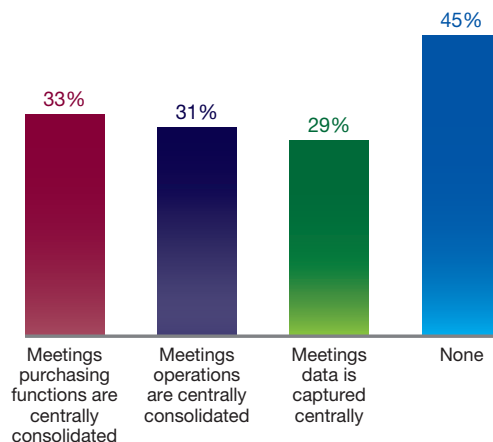
“Larger clients were globally consolidating their programs before, but in a lot of respects they were doing that to get their start and bring compliance policy and consistency around the globe,” Janssen continued. “It has almost been a discovery period, a first phase. Now you are seeing clients really take that global consolidation to not

Average 2010 U.S. Car Rental Rate*

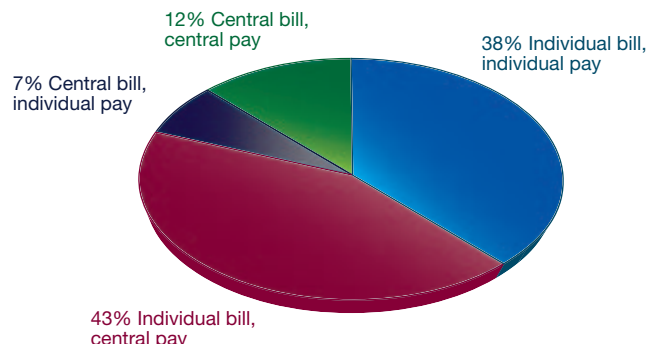


* Negotiated rate for midsize car

Centrally Consolidated Meetings Functions



2010 Corporate Card Configurations



just drive consistency but also look at regional and country cultural differences. In the RFP process, you are getting a lot

more questioning and detailed specifics on regions and countries regarding capabilities and the foundation of operations.

More clients want to get out and kick the tires in those areas. Before, they may have just taken for granted that what is there is what they are going to need.”

Such scrutiny may be contributing to divergent preferences on global agency configurations, with some organizations favoring regional call centers and others considering other set-ups. Janssen suggested that regional call centers are “maybe less preferred than they were a couple of years ago. Clients absolutely are still looking at that, but they want to make sure that in-country capabilities and in-country knowledge exist, depending on where those call centers are located. A regional call center that is very homogenized, with no ability to get some of the fares and handle nuances and language needs will not fit for a lot of people. Those regional call centers have to be less homogenized than they used to be.”

Paredes added that an organization’s definitions of efficiency and savings—which vary—may help steer them. “For some customers, it’s the lowest-cost solution possible,” he said. “But for others, maybe a regional call center solution is not necessarily the right one. You can’t have as much interaction with specific travelers before they travel because that might require local language and local understanding to drive the behavior. For customers looking more to drive that behavior rather than the transaction fee cost, they may make different choices.”

Policies

There also seems to be no clear trends on travel policy, with anecdotal evidence pointing to a loosening in some areas but a tightening in others. TCG Consulting’s Taras, for example, said some of his clients “are more serious about policies” as they

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move away from guidelines and toward “more strict, defined, exceptions-based” policies.

Janssen, however, said he has seen “a tilt” in the other direction. Companies “are realizing that by ensuring they are putting some of the service aspects back into the policy and managing some of the needs of the travelers, they are getting greater compliance from those travelers, which allows them to drive buying behavior to keep costs down. They are trying to maintain a moderately strict policy but interject some service capabilities.”

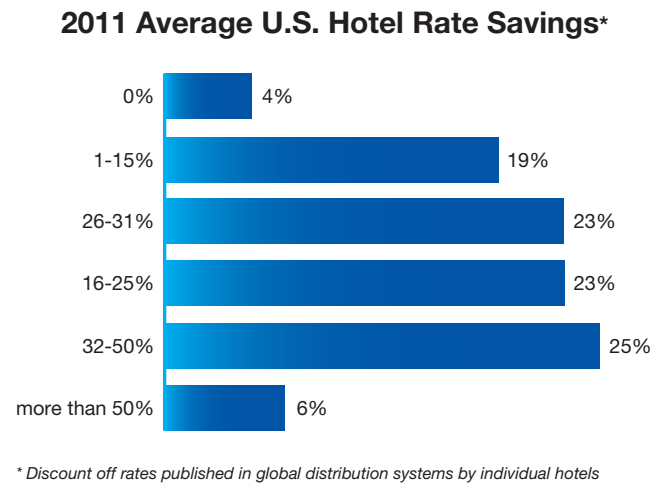
Among those companies surveyed by *BTN*, nearly three-quarters said business-class policies this year are unchanged. Nearly all of the remainder said they had become more restrictive while 3 percent of the total reported less restrictive policies.

Meanwhile, the authors of the GBTA Foundation/Egencia study determined that “companies that spend more on travel are more likely to encourage advance purchase [airline tickets] without requiring it. However, companies that spend less on travel tend to set longer minimum advance purchase periods, i.e. 14 and 21 days, compared to the average. This difference can be attributed to more realistic policies by higher-spend companies, and more aggressive targets at lower-spend companies.”

Spotlight On Hotels

The GBTA/Egencia survey also found that companies spending more than \$50 million annually on T&E are “significantly less likely to restrict hotels by cost per night” than smaller programs, and are “also most likely not to restrict hotels at all”

Hotels had the lowest percentage of policy-compliant bookings (72 percent on average, according to the *BTN* sur-



vey) among the various travel categories. The segment is attracting particular attention as both published and corporate negotiated rates rise.

Fifty percent of those polled by *BTN* said hotels generally exhibited a less receptive attitude this year than last year regarding negotiating preferred

pricing agreements. Airlines were second, with 36 percent perceiving a less receptive attitude. “It’s likely a reaction to the fact that last year even large buyers in certain markets saw significant rate increases,” said TCG Consulting hotel practice director Kim Maschoff. “Some hotels were saying, ‘We actually

don’t want all your volume, the market is buoyant enough for me to fill it with other higher-rate business.’ We also saw less willingness to give last-room availability. Last year they included Internet and breakfast, and this year they have reduced amenities or not offered any.”

Maschoff added that the latest economic cycle has brought “indications that there may have been less opportunity to negotiate on the airline side. There definitely has been a transfer: ‘Where can we focus to make an impact in the travel budget?’ Hotels started to pop up.

“For some CFOs, it’s hard to understand total market conditions,” Maschoff continued. “You see consumer confidence going down, GDP being downgraded and what is going on in the stock market. All the pointers are that this should be a depressed market, but that’s not what is happening in the hotel market at the moment.”

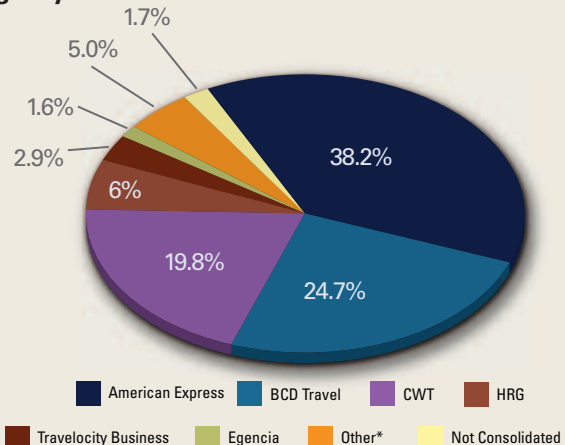
Methodology

This 24th annual *Business Travel News* Corporate Travel 100 ranking is based on 2010 air tickets purchased for business travel at all U.S. points of sale. Most listed organizations provided information for use both in their specific listings and aggregate benchmarking data, some of which is highlighted here.

Respondent organizations completed an online questionnaire; some provided additional information in interviews. For organizations that did not participate, *BTN* used industry sources, published reports and other intelligence to compile data. Each was given an opportunity to improve the accuracy of *BTN* estimates.

Fourteen firms not in-

Agency Share of CT100 2010 U.S. Booked Air Volume



* Includes Boeing Corporate Travel Dept. and agencies with less than 1 percent share: Travel Management Partners, Orbitz for Business, Walmart Corporate Travel Dept. and ITT Corporate Travel Dept.

cluded last year qualified for this list, including first-time members Boston Consulting, Covidien, Danaher, L-3 Communications and Schneider Electric. Those falling off in-

clude such familiar CT100 organizations as Alcatel-Lucent, Boston Scientific, Booz Allen Hamilton and Nokia.

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2 General Electric	\$285.7	52 Royal Dutch Shell	\$67.1	Accenture	6	Johnson & Johnson	15
3 Boeing	\$263.2	53 Cisco Systems	\$66.15	ADP	91	Johnson Controls	85
4 Deloitte	\$263	54 International Monetary Fund	\$65.8	American International Group	84	JPMorgan Chase	14
5 General Dynamics	\$256	55 Schneider Electric	\$65.4	Apple	50	KMPG	34
6 Accenture	\$240	56 SAP	\$65	AT&T	78	Kraft Foods	64
7 Lockheed Martin	\$221	57 Morgan Stanley	\$65	BAE Systems	59	L-3 Communications	40
8 Exxon Mobil	\$220	58 Credit Suisse	\$62.3	Bank Of America	10	Lockheed Martin	7
9 World Bank	\$195	59 BAE Systems	\$61.5	Barclays	43	Marsh & McLennan	69
10 Bank Of America	\$182	60 Zurich Insurance	\$60	Bayer	85	McKesson	77
11 Oracle	\$168.9	61 EMC	\$59	Boeing	3	McKinsey	36
12 PricewaterhouseCoopers LLP	\$158.3	61 Motorola	\$59	Boston Consulting Group	94	Medtronic	39
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26 Novartis	\$105.03	76 Emerson	\$48.9	Dell	45	PricewaterhouseCoopers LLP	12
27 Procter & Gamble	\$105	77 McKesson	\$48	Deloitte	4	Procter & Gamble	27
28 Walt Disney	\$101.7	78 AT&T	\$47.2	Deutsche Bank	33	Raytheon	16
29 Citigroup	\$101	79 Nestlé	\$47	Dow Chemical	66	Royal Dutch Shell	52
30 Merck	\$95.6	80 UBS	\$46.9	Dupont	91	Royal Philips Electronics	89
31 United Technologies	\$95.3	80 WPP	\$46.9	Eli Lilly and Co.	42	Sanofi-Aventis	70
32 Goldman Sachs	\$93.7	82 Thomson Reuters	\$46	EMC	61	SAP	56
33 Deutsche Bank	\$91	83 Interpublic Group	\$45.6	Emerson	76	Schlumberger	96
34 KMPG	\$90	84 American International Group	\$45.3	Ernst & Young	23	Schneider Electric	55
35 Pepsico	\$89.3	85 Bayer	\$45	Exxon Mobil	8	SAIC	47
36 McKinsey	\$87	85 Johnson Controls	\$45	Fedex	24	Siemens	19
37 Chevron	\$85	87 Covidien	\$44	Fidelity	89	Thomson Reuters	82
38 Honeywell	\$80	88 Viacom	\$43.9	Genentech	22	Time Warner	41
39 Medtronic	\$79.2	89 Fidelity	\$43.8	General Dynamics	5	UBS	80
40 L-3 Communications	\$78	89 Royal Philips Electronics	\$43.8	General Electric	2	United Nations	47
41 Time Warner	\$77.5	91 ADP	\$43	General Motors	45	United Technologies	31
42 Eli Lilly and Co.	\$73.6	91 ConocoPhillips	\$43	GlaxoSmithKline	51	UnitedHealth Group	70
43 Barclays	\$73.4	91 Dupont	\$43	Goldman Sachs	32	Verizon Communications	95
44 Caterpillar	\$72	94 Boston Consulting Group	\$42.9	Hewlett-Packard	18	Viacom	88
45 General Motors	\$70.6	95 Verizon Communications	\$42.2	Honeywell	38	Walmart	74
45 Dell	\$70.6	96 Schlumberger	\$42	HSBC	70	Walt Disney	28
47 SAIC	\$70	97 CSC	\$41.8	IBM	1	Wells Fargo	13
47 United Nations	\$70	98 Danaher	\$41.6	Intel	63	World Bank	9
49 BP	\$69.9	99 Cargill	\$41.5	International Monetary Fund	54	WPP	80
50 Apple	\$69	100 Bristol-Myers Squibb	\$40.9	Interpublic Group	83	Zurich Insurance	60

* 2010 U.S.-booked air volume

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1 IBM
ARMONK, N.Y.

2010 U.S.-BOOKED AIR VOLUME: \$545 million
PREFERRED VENDORS: Travelport Traversa; Galileo
CONSOLIDATED U.S. AGENCY: American Express

The largest purchaser of travel on this list, IBM is estimated to have increased its U.S.-booked air spending last year from \$500 million in 2009 and 2008. IBM reported 426,751 employees worldwide at the end of 2010, up from 399,409 in 2009. The company reported 2010 revenue of \$99.9 billion, up 4 percent from 2009.

Procurement councils continue to buy IBM's major spending categories, and travel falls in general procurement, one of three broad areas. The travel procurement team is responsible for all business travel services, with regional contacts for airlines, automobile rentals, hotels, purchasing cards, travel agency services and travel charge cards. IBM Managed Business Process Services, which provides outsourced human resources, accounting, travel and expense management services, services IBM as a client.

Airline procurement executives are responsible for negotiating for "IBM business-driven spending for individual and group travel, as well as for the purchase of the corporate fleet, when required," according to IBM's procurement website.

IBM's hotel directory provides employees a list of properties "with pre-negotiated rates that also meet IBM's safety and security guidelines." Travel agency specialists require "global presence fulfillment of travel reservations booked online as well as consolidated reporting."

Auto rental specialists are responsible for sourcing solutions that deliver "world-class service and constant competitive-advantage pricing." Auto leasing specialists are part of travel procurement, as IBM uses "outsourced fleet administration for leased vehicles, including maintenance and other services as specified by country." IBM also has a network of preferred ground transportation providers in a city-specific program to meet its travel and meeting needs.

In a multi-tiered relationship with Travelport, IBM helped the global distribution system develop its Traversa booking tool, used by more than 250,000 IBM travelers in 70 countries. In addition to GDS content, Traversa offers IBM users "API content like the Air Canada fare families," according to Travelport. The companies also integrated IBM's Global Expense Reporting Solutions with all Travelport GDS bookings for internal use and as a product offering of both firms.

2 GENERAL ELECTRIC
FAIRFIELD, CONN.

2010 U.S.-BOOKED AIR VOLUME: \$285.7 million
PREFERRED VENDORS: Hertz; Sabre; GetThere
CONSOLIDATED GLOBAL AGENCY: Carlson Wagonlit Travel

General Electric reduced its 2010 U.S.-booked air spending by another \$15 million, after cutting \$20 million the previous year and

more than \$30 million the year before that. It also trimmed headcount in 2010 to 287,000 from 288,000 in 2009 and 323,000 employees in 2008. More than half of its workforce is based outside of the United States.

GE continued advancing the consolidated global travel management philosophy it pioneered, combining all travel management operations with one agency, one global distribution system, one online booking system and one reporting system (Carlson Wagonlit Travel, Sabre, GetThere and the Prism Avion data management system, respectively).

GE continued to consolidate travel operations in the Asia/Pacific region in 2010. Europe is served by one business travel operations center, but Asian countries still are served individually.

The company uses GetThere for all transactions in more than two dozen countries, including 18 in Europe that use CWT's Warsaw call center. GE averages more than 75 percent of its global bookings online.

In 2010, GE had more than 35 sites equipped with telepresence systems, which can be reserved through its online booking tool.

GE still uses a homegrown solution for its U.S. expense reporting, but uses Concur in Europe and Asia.

The company in 2010 provided the American Express card to more than 82,000 employees in the United States and more than 100,000 worldwide.

International SOS powers GE's Global Travel Assistance program, which provides global health and security services to all employees.

Late last year, GE announced that it would buy 25,000 electric vehicles, nearly half from General Motors, to make up part of its 30,000-car fleet and to help convert leasing customers to electric vehicles.

3 THE BOEING CO.
CHICAGO

2010 U.S.-BOOKED AIR VOLUME: \$263.2 million
COMPANYWIDE BOOKED AIR VOLUME: \$272 million
COMPANYWIDE T&E: \$512 million
HIGHEST-VOLUME SUPPLIERS: American, Delta, United; Hilton, Marriott, InterContinental; National, Alamo, Avis; GetThere; Concur
CONSOLIDATED U.S. AGENCY: Boeing Corporate Travel Department

The Boeing Co. last year completed the transition to an ARC-accredited Corporate Travel Department from a wholly owned travel management company. The CTD services not only Boeing but also its joint-venture partners and subsidiaries; last year it implemented standard processes for all. Booked air volume rose nearly 23 percent both in the United States and companywide. All but \$9 million of Boeing's air volume was booked in the United States; of that, \$1.8 million was booked in Europe.

Boeing last year tightened several travel and expense policies, particularly those related to corporate card usage and expense reporting. For example, Boeing now can suspend or cancel cards for outstanding charges or incomplete or aged expense reports, and prohibits

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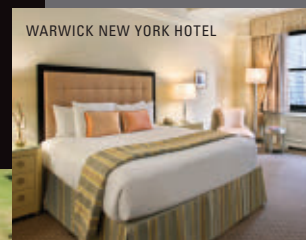
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employees whose cards are suspended or canceled for noncompliance from traveling or incurring business expenses until the card is reinstated. Boeing also redefined usage of personal cards for business travel and required charges incurred 14 days or more before a trip to be expensed prior to travel. Another change required all late fees to be company-paid to accommodate certain state laws.

On class of service, Boeing deleted options allowing non-executive employees to fly first class and executives to authorize non-executives to fly with them in first class.

Last year, the company completed sourcing and benchmarking efforts for several travel supplier and technology categories. This year, it plans to migrate all Boeing travel, including that of international operations, subsidiaries, acquisitions and joint ventures, to a new integrated system. The company also wants to refine its travel booking and expense systems, technology and processes to increase end-user productivity, decrease costs and gain greater policy compliance. It also wants to enhance user productivity with mobile and live-chat technology and by eliminating receipt faxing.

4 DELOITTE NEW YORK

2010 U.S.-BOOKED AIR VOLUME: \$263 million

U.S. T&E: \$700 million

PREFERRED VENDORS: Delta, American, Continental; Marriott, Starwood, Hilton; Avis Budget; Orbitz for Business

CONSOLIDATED U.S. AGENCY: None, BCD Travel is primary

Deloitte in 2010 focused on improving compliance to and the efficiency of its travel program, as its U.S.-booked air volume increased by about 27 percent from 2009 levels.

The Big Four accounting and consulting firm last year also refined its emergency response planning and piloted mobile applications for itinerary management, travel notifications and pre-trip approvals. Deloitte this year is beginning to implement a mobile strategy.

Deloitte in 2011 is conducting multinational sourcing efforts for airline, hotel and rental car service, while doing the same in the United States for chauffeured transportation and corporate apartments. The company, which receives no rebates or back-end incentives, also is undertaking an effort to increase operational travel management company efficiency. Deloitte travelers carry Diners Club MasterCard and American Express corporate cards, and the company uses an internally developed expense reporting tool.

5 GENERAL DYNAMICS FALLS CHURCH, VA.

2010 U.S.-BOOKED AIR VOLUME: \$256.1 million

CONSOLIDATED U.S. AGENCY: None, BCD Travel is primary

According to *BTN* estimates, General Dynamics' 2010 U.S.-booked air volume increased from 2009 levels.

The defense contractor reported a steady level of net earnings growth, while reducing headcount by just a few employees in 2010 from 2009. In 2010, General Dynamics reported net earnings of \$2.6 billion from \$2.4 billion in 2009, while revenues totaled \$32.5 billion from \$32 billion the year before.

The firm does not use a consolidated travel management company, but BCD Travel in 2010 completed most of its U.S.-booked reservations, while Carlson Wagonlit Travel completed about 9 percent.

6 ACCENTURE DUBLIN

2010 U.S.-BOOKED AIR VOLUME: \$240 million

COMPANYWIDE BOOKED AIR VOLUME: \$571 million

U.S. T&E: \$571 million

COMPANYWIDE T&E: \$1.3 billion

PREFERRED VENDORS: United, Delta, American; Marriott, Starwood, Hilton; Hertz, Avis; GetThere

CONSOLIDATED GLOBAL AGENCY: Carlson Wagonlit Travel

Accenture last year completed a global travel program consolidation, deploying on a worldwide basis one travel management company, a primary booking tool and a primary global distribution system. The company established round-the-clock traveler support and agent services from three locations: Rzeszów, Poland; Downers Grove, Ill.; and Singapore.

Accenture last year completed a bid for its U.S. corporate housing program, selecting ExecuStay by Marriott and shifting three full-time Accenture employees to the provider for program support.

The company last year in France, Belgium, the Netherlands and Luxembourg outsourced its meetings program to American Express, and also launched a Europe-wide meetings sourcing program.

Accenture's travel organization this year established enhanced reporting. It is working toward new global airline deals. The company also expects to deploy online booking in India. Accenture travelers carry the American Express corporate card and file expenses using an internal system.

The company's U.S. booked air volume last year grew from \$185 million in 2009. The company in 2010 maintained its 90 percent online booking adoption in the United States.

7 LOCKHEED MARTIN BETHESDA, MD.

2010 U.S.-BOOKED AIR VOLUME: \$221.2 million

COMPANYWIDE BOOKED AIR VOLUME: \$229 million

COMPANYWIDE T&E: \$512 million

PREFERRED VENDORS: United, American, Delta; Marriott; Avis Budget

CONSOLIDATED GLOBAL AGENCY: Travelocity Business

Multinational defense contracting firm Lockheed Martin in 2010 attained an overall travel program compliance rate of more than 90

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percent and revised a policy mandating the use of all nonrefundable tickets. This year, Lockheed Martin expects to mandate that travel be booked at least seven days in advance.

Lockheed Martin in 2010 implemented a new companywide travel affordability and cost-reduction policy in order to bring down the cost of travel without reducing travel itself. As a result, Lockheed Martin reduced its overall travel and entertainment spend to \$512 million in 2010 from \$648 million in 2009. Companywide booked air volume in 2010 was \$15.4 million less than 2009.

Furthermore, Lockheed Martin drove down its per-booking cost by steering travelers toward its online booking tool. In 2010, 93 percent of Lockheed Martin's domestic air travel bookings were completed online and 82 percent of U.S. tickets booked had no agent assistance.

This year Lockheed Martin likely will negotiate frequent flyer status for all employees in order to avoid ancillary fees.

8 EXXON MOBIL

IRVING, TEXAS

2010 U.S.-BOOKED AIR VOLUME: \$220 million

CONSOLIDATED U.S. AGENCY: None, Carlson Wagonlit Travel is primary

Exxon Mobil in 2010 again pushed up its air volume, a trend it has followed for a decade, according to *BTN* estimates.

Consolidated revenue at the integrated oil company increased to \$370.1 billion, up from \$301.5 billion the prior year. Exxon Mobil in 2010 also increased company headcount. It reported 83,600 employees at the end of the year, compared with 80,700 at the end of 2009.

A variety of travel management companies handle Exxon Mobil's travel. While Carlson Wagonlit Travel is its primary agency for travel outside of its headquarters, American Express handles travel at headquarters, and BCD Travel handles travel in Europe, the Middle East and Africa.

9 WORLD BANK

WASHINGTON, D.C.

2010 U.S.-BOOKED AIR VOLUME: \$195 million

PREFERRED VENDORS: British Airways, Lufthansa, United, Air France, Korean Air, ANA, Delta; SAP

CONSOLIDATED U.S. AGENCY: American Express

The World Bank, which provides financial and technical assistance to developing countries, is serviced by American Express in North America and uses the Diners Club travel and entertainment card.

The bank, which often books complex international itineraries, continues to manage a tightly controlled preferred airline program, with pre-trip authorizations and mandated use of the preferred carriers, unless defined exception criteria are met.

In 2011, The World Bank began consolidating business in East Asia with BCD Travel, introducing local service in 10 markets with centralized quality control from BCD Travel's Bangalore call center. Once fully implemented in East Asia, the bank plans to continue to consolidate by region its more than 150 country offices.

10 BANK OF AMERICA

CHARLOTTE

2010 U.S.-BOOKED AIR VOLUME: \$182 million

PREFERRED VENDORS: Avis, Hertz, Enterprise, National; GetThere; Concur

CONSOLIDATED U.S. AGENCY: American Express

Bank of America, the largest bank in the United States by assets and the fifth-largest company in the United States by revenue, slightly increased its U.S. booked air volume over 2009 levels, according to *BTN* estimates.

Since acquiring Merrill Lynch in late 2008, Bank of America's travel program has become increasingly global, though the vast majority of its revenues still come from the domestic U.S. market. It currently is working on global requests for proposals for both its airline and hotel programs. Bank of America's total revenues in 2010 were \$110.2 billion, down from \$119.6 billion in 2009. It reports about 300,000 employees globally.

11 ORACLE

REDWOOD SHORES, CALIF.

2010 U.S.-BOOKED AIR VOLUME: \$168.9 million

COMPANYWIDE BOOKED AIR VOLUME: \$276.2 million

U.S. T&E: \$325.4 million

COMPANYWIDE T&E: \$168.9 million

PREFERRED VENDORS: United, Delta, American; Marriott, Hilton, Starwood; Hertz, Avis; GetThere; Oracle IExpense

CONSOLIDATED GLOBAL AGENCY: Carlson Wagonlit Travel

Oracle's U.S.-booked air volume last year grew from \$145 million in 2009. The enterprise technology system developer in January 2010 finalized the acquisition of technology firm Sun Microsystems, itself a former Corporate Travel 100 stalwart. Oracle's travel team in the past year has worked successfully to integrate the two travel programs, focusing on cost savings, supplier integration and process simplification. Oracle now operates offices in more than 100 countries and serves customers in 145 countries.

The company in the United States last year maintained a 90 percent online booking rate.

An innovator of follow-the-sun travel management, Oracle has consolidated its global travel program with Carlson Wagonlit Travel. Oracle arms travelers with the American Express corporate card and uses its own IExpense product for expense management.



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12 **PRICEWATERHOUSECOOPERS**
NEW YORK**2010 U.S.-BOOKED AIR VOLUME:** \$158.3 million**COMPANYWIDE BOOKED AIR VOLUME:** \$281 million**U.S. T&E:** \$314.7 million**COMPANYWIDE T&E:** \$640 million**PREFERRED VENDORS:** United, Delta, American; Marriott, Starwood, Hilton; Hertz, Avis, Budget; GetThere**CONSOLIDATED U.S. AGENCY:** American Express

Air spending in 2010 jumped 39 percent in the United States and 34 percent worldwide at PricewaterhouseCoopers, following a 35 percent domestic reduction in 2009. Despite the 2010 air ticket cost increases, the Big Four auditing, accounting and consulting firm reduced overall travel and entertainment costs nearly 18 percent in the United States and 8 percent worldwide.

Earlier cost management initiatives continued 2010. The company's travel management team also focused on enhancing the customer experience through technology and service delivery. The company modified its air policy and extended the travel policy to align with program enhancements.

Of PwC's \$281 million in global booked air volume, the United States generated 56 percent. Europe comprised \$112.7 million, or 40 percent, and offices elsewhere in the world contributed \$10 million.

PwC continued to use American Express as its consolidated travel management company in the United States, where 92 percent of bookings were made through the GetThere online tool. Elsewhere, HRG, American Express and BCD Travel served the firm. PwC uses SAP for expense reporting globally.

In the United Kingdom, PwC promotes videoconferencing as a travel alternative. The firm encourages use with an incentive program that recognizes business units and individuals and donates funds to save a rainforest, all based on usage in lieu of travel. PwC this year deployed two electric cars at its London offices in a car-sharing pilot aimed at reducing taxi use.

13 **WELLS FARGO & CO.**
SAN FRANCISCO**2010 U.S.-BOOKED AIR VOLUME:** \$155 million**COMPANYWIDE BOOKED AIR VOLUME:** \$165 million**COMPANYWIDE T&E:** \$450 million**PREFERRED VENDORS:** US Airways, Delta, United; Marriott, Hilton, Hyatt; Avis, Budget, Enterprise; Concur**CONSOLIDATED GLOBAL AGENCY:** HRG

Wells Fargo made no major policy changes in 2010, and slightly increased its 2010 U.S. booked air volume over 2009 to \$155 million from \$114 million. However, companywide travel and entertainment dropped to \$450 million from \$500 million in 2009.

Wells Fargo's total T&E expenditures in 2010 were \$783 million, according to its annual report. That figure included sponsorship and tickets to sporting events, the cost of its corporate aircraft and mileage reimbursement for use of personal cars. However, for *BTN*'s purposes, Wells Fargo considered \$450 million as a better representation of managed-travel program aspects.

14 **JPMORGAN CHASE**
NEW YORK**2010 U.S.-BOOKED AIR VOLUME:** \$153 million**COMPANYWIDE BOOKED AIR VOLUME:** \$301.7 million**COMPANYWIDE T&E:** \$500 million**PREFERRED VENDORS:** American, Continental, United, British Airways; Marriott, Hilton, Starwood; Avis, Hertz, Enterprise; GetThere**CONSOLIDATED GLOBAL AGENCY:** Carlson Wagonlit Travel

Financial services giant JPMorgan Chase in the past year continued to expand the worldwide reach of its online booking tools. The company garnered a 78 percent adoption rate with its GetThere self-booking tool in the United States, and further deployed the booking system to other countries, including markets in Asia and Europe.

The company this year also has worked to implement a traveler tracking and alert system.

JPMorgan Chase last year finalized a car services request for proposals and renewed its global agency agreement with Carlson Wagonlit Travel.

The company also rebid its hotel program, maintaining preferred relationships with Marriott, Hilton and Starwood. The company's U.S. booked air volume last year grew by more than 40 percent from \$103.9 million in 2009.

15 **JOHNSON & JOHNSON**
NEW BRUNSWICK, N.J.**2010 U.S.-BOOKED AIR VOLUME:** \$152.1 million**COMPANYWIDE BOOKED AIR VOLUME:** \$360 million**U.S. T&E:** \$359 million**COMPANYWIDE T&E:** \$725.5 million**PREFERRED VENDORS:** Continental, Delta, American, United; Marriott, Hilton, Starwood; Avis, National; GetThere; IBM**CONSOLIDATED GLOBAL AGENCY:** American Express

Pharmaceutical giant Johnson & Johnson in 2010 fully rolled out American Express as the preferred travel management company for its 250-plus operating companies in 60 countries, completing a global consolidation effort that began in 2008.

The company last year increased its global T&E spending and U.S.-booked air volume by about 17 percent and 35 percent, respectively, from 2009 levels.

J&J in 2011 is pushing global compliance to a standard meetings



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program and technology platform. The firm in 2010 spent about \$17.9 million on U.S.-booked airfares for conferences, up nearly \$3 million from 2009.

16 **RAYTHEON** WALTHAM, MASS.

2010 U.S.-BOOKED AIR VOLUME: \$152 million

COMPANYWIDE AIR VOLUME: \$163 million

PREFERRED VENDORS: American, Delta, US Airways; Hilton, Marriott, InterContinental; National, Avis, Enterprise; Concur Cliqbook

CONSOLIDATED GLOBAL AGENCY: BCD Travel

Raytheon last year increased both its U.S.-booked and companywide air volume by about 2 percent from 2009 levels.

The defense and government contractor last year boosted adoption of the Concur Cliqbook online booking tool to 88 percent of applicable U.S. domestic transactions from 85 percent. This year, the company plans to upgrade aspects of its online booking system.

Raytheon in 2010 also expanded the international reach of its travel program and increased the use of nonrefundable tickets.

17 **PFIZER** NEW YORK

2010 U.S.-BOOKED AIR VOLUME: \$149.3 million

CONSOLIDATED GLOBAL AGENCY: BCD Travel

BTN estimates pharmaceutical giant Pfizer's 2010 U.S.-booked air volume in 2010 jumped noticeably from \$100 million in 2009. Although 2010 full-year net income for Pfizer in 2010 fell to \$8.3 billion from \$8.6 billion in 2009, the year ended with a strong fourth quarter.

Pfizer reported fourth-quarter net income of \$2.9 billion as compared with \$767 million during the fourth quarter in 2009, representing a 277 percent increase. Meanwhile revenues in 2010 picked up from 2009, increasing to \$67.8 billion from \$50 billion.

18 **HEWLETT-PACKARD** PALO ALTO, CALIF.

2010 U.S.-BOOKED AIR VOLUME: \$145 million

COMPANYWIDE BOOKED AIR VOLUME: \$310 million

U.S. T&E: \$390 million

COMPANYWIDE T&E: \$1.02 billion

PREFERRED VENDORS: United, Delta, American; Marriott, Hilton, Starwood; Hertz, Avis

CONSOLIDATED GLOBAL AGENCY: Carlson Wagonlit Travel

Hewlett-Packard spent much of 2010 working with its travel management company to channel bookings through call centers

in Vancouver and Rzeszów, Poland, to which it has consolidated more than 80 percent of its global travel.

During 2010, Hewlett-Packard in conjunction with Carlson Wagonlit Travel installed a new call-routing technology that allowed traveler calls to flow more efficiently between centers, which reduced hold times. Additionally, HP altered a policy mandating requiring vice-president-level approval for exceptions to the travel policy.

Meanwhile, HP surveyed the company's 100,000 travelers to better understand the company's demographics, travel patterns and buying and compliance behaviors and determine if cost savings opportunities could be uncovered. The company discovered that travelers who spend 50 percent of their time on the road represent one-third of its overall travel budget. By categorizing travelers, HP was able to deliver group-specific messages to garner significant savings.

In 2011, HP aims to improve compliance reporting and incorporate more use of demographics and trends to better drive savings and identify new savings opportunities.

HP's travel department also completed a global air bid, resulting in the addition of Delta Air Lines as a preferred airline. HP also implemented dynamic pricing agreements with its hotel chains—a first for the company—and added Starwood Hotels and Resorts as a preferred hotel chain.

This year, HP will push to increase compliance to its global meetings processes, tools and suppliers. The company will refresh its travel policy, adding language identifying connection requirements as a means to improve the productivity of travel.

Another HP focus is to increase the number of its Halo telepresence suites of and improve utilization of the facilities.

19 **SIEMENS** MUNICH, GERMANY

2010 U.S.-BOOKED AIR VOLUME: \$144.9 million

PREFERRED VENDORS: United, Continental, Lufthansa, American, Delta, Southwest; Hilton, InterContinental, LaQuinta, Marriott; National, Enterprise; Rearden; EZ-X

CONSOLIDATED U.S. AGENCY: BCD Travel

Siemens last year spent about 15 percent more on airfares from the U.S. point of sale, up from \$126 million in 2009, according to *BTN* estimates. Despite the growth, Siemens' air volume did not return to the \$190 million estimated in 2008.

Siemens in 2009 centralized all purchasing, including travel and other mobility services, under a corporate supply chain management organization that reports to geographic executives and a managing board in Munich. Though centralized, there remains flexibility among regional and country managers. For example, BCD Travel serves as Siemens' consolidated agency in the United States, while other regions can use other preferred travel management companies, including American Express, Carlson Wagonlit Travel and FCm Travel Solutions. Similarly, Rearden is the pre-

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Breton Village Travel Services

Brownell Travel
Bursch Travel/American
Express
Cadence
Canyon Creek Travel
Cardoza Travel Services
Carlson Millstream Travel
Carrousel Travel American
Express
Casto
CCRA Travel Solutions
Cerritos Travel
Christopherson Business
Travel
CI Travel
Circles
CME Tours
Colpitts World Travel
Colwick Travel Corporation
Condado Travel
Conlin Travel
Corporate Travel Solutions
Crucon Cruise Outlet Plus
CruiseOne/Cruises Inc
Designs by Strawberry
Ensemble Travel
Expedia
Express Travel
Flathead Travel Service
Flight Centre USA
FlyBranson Travel
Fox World Travel
Friendly Travel
Frosch International Travel
Gant Travel Management
Gateway Travel Service
Geraci Travel
Global Custom Tours

Global Travel
Hess Corporate Travel
Hickory Travel Systems
Hogg Robinson Group
(HRG) Worldwide
Hub Travel Center
Hurley Travel Experts
Jauntree
Legacy Travel
Leisure Travel Alliance
Mai 10
Mansour Travel Company
MAST Vacation Partners
Maupin Travel
McCabe World Travel
Menno Travel/American
Express
Merit Travel Group
Montrose Travel
MSP Travel Group
Mundi Travel/American
Express
National Travel Service
Nexion
Omega World Travel
Orbitz Worldwide
Ovation Travel Group
Passageways Travel/American
Express
Plaza Travel
Poe Travel
Polk Majestic Travel Group
priceline.com
Protravel International
Radius
Rovia
San Diego Travel Group
Sanditz Travel Management

Signal Travel and Tours
Signature Travel Network
Sky Bird Travel & Tours
STA Travel
Sterling Travel Agency
Strong Travel Services
Tangerine Travel
The Auto Club Group
The Travel Society
The Travel Team/American
Express
Travel and Transport
Travel Design USA
Travel Experts
Travel Guard, Business Travel
Services
Travel Leaders
(Fort Wayne, IN)
Travel Leaders
(Memphis, TN)
Travel Leaders -
OutsideAgentLink.com
Travel Leaders Child Travel/
Albany Travel
Travel Leaders Corporate
Travel Leaders Franchise
Group
Travel Leaders/Travel Plus
Travel Management Partners
Travel Planners International
Travel Time Travel Agency
Travelfocus
Travelink/American Express
TravelLeaders/Goli's Avenues
of Travel
Travelocity
Travel-On
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Uniglobe Instant Travel
Uniglobe Travel International
Uniglobe Travel Partners
Unique Travel of Palm Beach
Universal/Accent Travel -
American Express
Vacation.com
Valerie Wilson Travel
Viajes Plaza
Viking Travel Service
Virtuosio
Vision 2000
Wal-Mart Stores
Wayland Travel
WD World Travel
Western Association of Travel
Agencies
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ferred corporate booking tool in the United States and Canada, but others are available elsewhere to address local needs. Siemens has taken a similar approach with its travel policy, as the company combines overarching guidelines with regional flexibility.

With its central structure, Siemens last year continued to increase worldwide preferred channel compliance, supplier adoption and online booking.

The company last year completed rolling out a meetings program in the United States, integrating meetings payment with automated planning and air and hotel booking processes through the StarCite and American Express Meetings360 platform.

Meanwhile, Siemens in August this year signed an agreement with Air China to cover travel between key European markets and China.

20 MICROSOFT REDMOND, WASH.

2010 U.S.-BOOKED AIR VOLUME: \$136 million

COMPANYWIDE BOOKED AIR VOLUME: \$263 million

COMPANYWIDE T&E: \$634 million

PREFERRED VENDORS: Marriott, Starwood, Hilton; Avis

CONSOLIDATED GLOBAL AGENCY: American Express

For technology goliath Microsoft, 2010 marked a year of savings opportunities. The company negotiated two-year hotel contracts, which locked in post-downturn rates, and rolled out an online booking tool in Asia. Additionally, Microsoft promoted the use of telepresence suites and for security purposes began tracking travelers via their mobile devices.

Microsoft also improved traveler tracking through the TripTracker tool, which also helped to identify savings opportunities by monitoring travelers' behaviors. The company this year will launch the second generation of the tool. In 2011, Microsoft contracted with Concur to launch Cliqbook as its new preferred online booking tool, replacing Orbitz for Business.

Operating on a July-to-June fiscal calendar, Microsoft reported calendar-year 2010 U.S. booked air volume of \$151 million and its total companywide booked air volume of \$297 million.

21 NORTHROP GRUMMAN LOS ANGELES

2010 U.S.-BOOKED AIR VOLUME: \$126.4 million

U.S. T&E: \$339.1 million

PREFERRED VENDORS: United, Delta, American; Hilton, Marriott, InterContinental; Budget, Avis; GetThere; Concur

CONSOLIDATED GLOBAL AGENCY: American Express

As a contractor for the federal government, aerospace, defense and shipbuilding firm Northrop Grumman must comply with federal procurement regulations. As such, the company last year imple-

mented system and policy controls in support of changes to the Federal Acquisition Regulation related to lowest logical airfare.

As a result, Northrop Grumman saw its U.S. booked air volume dip 7.4 percent from 2009 levels. Overall travel and entertainment spending dropped by 2.9 percent.

Northrop Grumman at the beginning of 2010 also went live with a new card program and spent the first part of the year stabilizing that program. Travelers now use Visa cards issued by J.P. Morgan on an individual-bill-and-pay platform. The company previously used American Express as its card issuer.

American Express, remains the company's consolidated agency. Northrop Grumman travelers book online via GetThere, which in 2010 handled 90 percent of the company's U.S.-booked air travel.

22 GENENTECH SOUTH SAN FRANCISCO, CALIF.

2010 U.S.-BOOKED AIR VOLUME: \$116.9 million

CONSOLIDATED U.S. AGENCY: BCD Travel

BTN estimates Genentech's U.S. booked air volume nearly doubled in 2010, a year after a merger with Hoffman-La Roche. Roche Holdings now is parent to both companies.

Through new ratings systems and surveys of top travelers, the biotechnology company in 2010 was able to improve performance from one of its preferred airline suppliers.

Early this year, Genentech drove savings in its air program through an aggressive communications campaign though the company's social network, a combination of wikis, blogs and discussion boards that Genentech travelers use for both information and safety purposes. That campaign urged travelers to follow best practices, including advance purchases, use of the online booking tool and reusing nonrefundable credits. As a result, the company saw a drop in cost per mile and significant improvement in advance-purchasing behavior.

The company this year is conducting requests for proposals for airline, hotel and ground transportation services.

Diversity is a large initiative for Genentech, which during bids aims to source at least one minority-owned company.

23 ERNST & YOUNG LONDON

2010 U.S.-BOOKED AIR VOLUME: \$115.2 million

PREFERRED VENDORS: Delta, American, Continental; Marriott, Starwood, Hilton; Avis; GetThere

CONSOLIDATED U.S. AGENCY: American Express

After deep travel spending cuts in 2009, Big Four auditor and professional services firm Ernst & Young last year grew its year-over-year U.S. booked air volume by more than 20 percent, ac-

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cording to *BTN* estimates.

The company last year embarked on efforts to globalize and consolidate its travel program, including the issuance of an overarching global travel policy and an increasingly multinational procurement strategy.

Travelers outside of the United States book travel through Carlson Wagonlit Travel, BCD Travel, HRG and smaller agencies, in addition to American Express, which serves as Ernst & Young's consolidated U.S. agency and preferred issuer of corporate cards.

24 FEDEX MEMPHIS

2010 U.S.-BOOKED AIR VOLUME: \$113 million

PREFERRED VENDORS: Delta, Southwest; Hertz, National

CONSOLIDATED U.S. AGENCY: None, BCD is primary

After several years of cutbacks, FedEx in 2010 boosted U.S. booked air spending to an estimated \$113 million from an estimated \$74.7 million in 2009.

FedEx noted that its own business in 2010 grew rapidly. An improved economy and robust demand helped the company increase revenues across all transportation segments to nearly \$40 billion, a 13 percent increase from 2009 levels.

FedEx selected BCD Travel for travel services. Employees worldwide can access the FedEx TravelNet intranet to find travel policies for their region, news and information about preferred suppliers and links to profiles, travel request forms in regions that require pre-trip approval, booking and expense reporting tools and itinerary reviews. The site also provides information on business and personal travel.

The company's preferred hotel directory includes more than 1,000 hotels worldwide.

FedEx last year employed 290,000 workers in more than 220 countries and territories.

25 ABBOTT LABS NEW BRUNSWICK, N.J.

2010 U.S.-BOOKED AIR VOLUME: \$110 million

CONSOLIDATED U.S. AGENCY: American Express

In addition to American Express in the United States, Abbott Labs also uses BCD Travel for travel management services in many markets around the world.

The health care products provider in 2010 identified commercial business travel as a key contributor to its carbon footprint and is pushing e-sourcing initiatives for a number of reasons including reduced travel.

The company in 2010 grew net sales 14 percent to \$35 billion and the number of employees to 91,440 from 72,868.

26 NOVARTIS BASEL, SWITZERLAND

2010 U.S.-BOOKED AIR VOLUME: \$105.03 million

COMPANYWIDE BOOKED AIR VOLUME: \$253.4 million

PREFERRED VENDORS: Continental, Lufthansa, Delta; Hilton, Marriott, Starwood; Hertz, National; GetThere, Traveldoo; Concur; SAP

CONSOLIDATED GLOBAL AGENCY: HRG

After selecting HRG Worldwide in 2009 as its global preferred travel management company, pharmaceutical firm Novartis last year implemented the change. The company previously had no consolidated agency, although Carlson Wagonlit Travel had handled a large majority of Novartis' domestic business in the United States and Switzerland. Internationally, Novartis had used American Express along with CWT and HRG.

In conjunction with the move to HRG, Novartis in 2010 closed a U.S. agency onsite and switched its preferred self-booking tool in North America to GetThere from CWT's Horizon. About 59 percent of Novartis' U.S. air bookings were booked online through its preferred vendor, a figure the company is pushing to increase.

This year, Novartis plans to complete bids for corporate cards—currently provided by American Express—and global air service.

The company's 2010 U.S.-booked air volume increased by about 25 percent from 2009 levels. Novartis this year is pursuing an initiative to achieve travel savings, in part through a new mandate to use the company's preferred hotels.

The company also plans to institute a policy that disallows reimbursement for air seat upgrades.

27 PROCTER & GAMBLE CINCINNATI

2010 U.S.-BOOKED AIR VOLUME: \$105 million

PREFERRED VENDORS: Delta, United, Air France; Sheraton, Marriott; National, Enterprise, Hertz; Amadeus E-Travel; IBM

CONSOLIDATED U.S. AGENCY: Egencia

Procter & Gamble last year converted its U.S. agency to Egencia from BCD Travel and this year continues to consolidate agency services. The company last year grew its U.S.-booked air volume to \$105 million from 2009's \$63.3 million, which had represented dramatic reductions from 2008 air spending levels.

Among priorities this year, the consumer goods giant is working to boost online booking adoption and is emphasizing global standard travel policies instead of country-by-country language. P&G uses HRG outside of the United States.

The company has been a successful adopter of remote conferencing technologies as a way to curb unnecessary travel, reduce its carbon footprint and cut spending. P&G travelers use the American Express corporate card to pay for travel and file expenses using IBM's platform.

28 **WALT DISNEY CO.**
BURBANK, CALIF.**2010 U.S.-BOOKED AIR VOLUME:** \$101.7 million**COMPANYWIDE BOOKED AIR VOLUME:** \$136.7 million**PREFERRED VENDORS:** United, Delta, Lufthansa; Marriott, Hilton, Starwood; Enterprise, Hertz; GetThere; SAP**CONSOLIDATED U.S. AGENCY:** HRG North America

After a major cutback in 2009, Disney's 2010 companywide spending on U.S.-booked airfares rebounded by about 18 percent, and its companywide air, hotel and car rental spending increased about 28 percent.

Still, the company last year generated savings from greater use of preferred suppliers.

Outside the United States, Disney's travel management service providers are split geographically: BCD Travel is the company's preferred travel management company in Europe, the Middle East, Africa, Latin America, and Japan, while HRG serves Disney in Australia and in other Asia/Pacific countries. The company plans further consolidation in 2011.

Disney in 2010 also stressed the use of its GetThere self-booking tool in the United States, where the share of applicable domestic transactions booked online rose to 36 percent.

Disney has successfully negotiated with its preferred carriers to reduce or eliminate some ancillary fees. The company pays no fees for first-checked bags, priority boarding or preferred seat assignments, and pays varied rates for second-checked bags.

29 **CITIGROUP**
NEW YORK**2010 U.S.-BOOKED AIR VOLUME:** \$101 million**COMPANYWIDE BOOKED AIR VOLUME:** \$247 million**PREFERRED VENDORS:** Hilton, Sheraton, Marriott; Concur**CONSOLIDATED U.S. AGENCY:** American Express


Deploying demand management techniques, lowest-logical-airfare and hotel-rate policies, new preferred supplier agreements and tighter program compliance, Citigroup last year shaved millions of dollars from its corporate travel program, including a nearly \$49 million year-over-year reduction in U.S. booked air volume, according to *BTN* estimates.

In 2009, Citi, which has operations in approximately 100 countries, installed a new travel team to overhaul and upgrade the global travel program. That year, Citi embarked on a global hotel program, negotiating rates in every city with more than 100 annual room nights. The new hotel program launched last May, successfully lowering rates and increasing the number of cities with preferred hotels.

Citi last year also completed its first global airline bid, with two-year airline contracts taking effect in October 2010.

More than 95 percent of applicable transactions were booked through designated travel agencies, and Citi to support corporate duty-of-care objectives for the first time implemented a policy in which travelers are not fully reimbursed if they do not do so.

American Express is Citigroup's preferred travel agency in the United States, while Carlson Wagonlit Travel, Swire and



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JTB are used outside of the country. Travelers booked nearly 80 percent of U.S. air transactions through the Cliqbook tool by Concur, which also furnishes the company's preferred expense reporting system.

30 **MERCK & CO.** WHITEHOUSE STATION, N.J.

2010 U.S.-BOOKED AIR VOLUME: \$95.6 million

COMPANYWIDE BOOKED AIR VOLUME: \$193.4 million

U.S. T&E: \$118.4 million

COMPANYWIDE T&E: \$546.2 million

PREFERRED VENDORS: Continental, US Airways, Delta; Hilton, InterContinental Marriott; National, Avis; Concur Cliqbook; SAP

CONSOLIDATED U.S. AGENCY: American Express

Merck & Co., known as Merck, Sharp and Dohme or MSD outside the United States and Canada, in 2010 completed its first year as a combined company after its late 2009 merger with Schering-Plough. Merck reported 2010 sales of \$45.9 billion, 94,000 employees and a global booked air volume 19 percent more than a year ago. U.S.-booked air spiked more than 86 percent last year and T&E grew nearly 40 percent. More than half of the company's sales and air volume now originate outside of the United States.

The company focused on the continued globalization of its American Express corporate card program and optimized both its travel management company program and technology. In the United States, Merck uses Concur's Cliqbook and reported 58 percent adoption of the tool, with 88 percent of such bookings requiring no agent intervention. Globally, the company uses various online booking tools through TMC reseller agreements.

Merck's consolidated U.S. TMC, American Express, also serves as its primary TMC outside the country. Air booking volume for meetings in the United States nearly doubled to \$15.1 million last year. Travel also continued to support the global SAP rollout for expense reporting.

31 **UNITED TECHNOLOGIES** HARTFORD, CONN.

2010 U.S.-BOOKED AIR VOLUME: \$95.3 million

COMPANYWIDE BOOKED AIR VOLUME: \$123.9 million

U.S. T&E: \$301 million

COMPANYWIDE T&E: \$394 million

PREFERRED VENDORS: Delta, United, American; Marriott, Hilton, InterContinental; Avis; CWT Horizon, KDS; SAP

CONSOLIDATED GLOBAL AGENCY: Carlson Wagonlit Travel

United Technologies' U.S. booked air volume increased 26 percent year over year in 2010, recovering more than half of what had been lost since 2008. Companywide booked air rebounded by similar levels, while both U.S. and companywide travel and entertainment

spending were up about 16 percent.

Meanwhile, the defense contractor and technology manufacturing conglomerate has been undertaking sourcing projects across most major vendor categories. In 2010, it completed sourcing for global travel management services. Carlson Wagonlit Travel serves as its consolidated U.S. agency, while CWT, American Express and the Spain-based El Corte Ingles handle travel outside of the country. United Technologies also completed sourcing for its car rental program and its T&E card, which is supplied by Citibank.

This year, the company is working on sourcing projects for its air program and for meetings management.

32 **GOLDMAN, SACHS & CO.** NEW YORK

2010 U.S.-BOOKED AIR VOLUME: \$93.7 million

COMPANYWIDE BOOKED AIR VOLUME: \$221.3 million

U.S. T&E: \$249 million

COMPANYWIDE T&E: \$489 million

PREFERRED VENDORS: American, Continental, Delta; Hilton, Ritz-Carlton, Hyatt; Hertz, Avis; GetThere

CONSOLIDATED GLOBAL AGENCY: American Express

After an almost 30 percent drop in its U.S.-booked air volume during 2009, Goldman, Sachs & Co.'s U.S.-booked and companywide booked air volumes in 2010 each increased by almost 50 percent.

The financial services firm in 2010 worked to increase touchless transactions and reported a 90 percent adoption rate for all eligible transactions in the Americas. Goldman Sachs also further boosted compliance to its GetThere online booking tool in the United States, with 75 percent of U.S. air bookings in 2010 made through the system, compared with 71 percent in 2009.

On the hotel side, Goldman Sachs is finalizing a global request-for-proposals project. The firm last year completed a global RFP for car rental services last year.

Goldman Sachs in 2009 renewed a three-year contract with American Express for global travel management services. American Express also provides corporate cards to Goldman Sachs business travelers.

The firm uses an in-house tool, TEEMS, for expense reports.

33 **DEUTSCHE BANK** FRANKFURT

2010 U.S.-BOOKED AIR VOLUME: \$91 million

U.S. T&E: \$152 million

COMPANYWIDE T&E: \$595 million

CONSOLIDATED U.S. AGENCY: HRG

Financial services firm Deutsche Bank last year saw a nearly 50 percent increase in its U.S.-booked air volume from 2009 levels.

The company's travel department in the past year has invested

in new management reporting and traveler tools. Among those, Deutsche Bank has enhanced post-trip management information systems and deployed self-service online reporting on a global basis. The company this year is working to refine and redeploy its automated pre-trip approval tool, with plans to expand it globally to help better control travel spending. The company is deploying additional demand management techniques and tools, including plans to replace some one-day trips with remote conferencing. Deutsche Bank also began pushing out weekly pre-trip reports to key stakeholders to help control spend and limit consumption.

Meanwhile, Deutsche Bank also has better armed its corporate travelers with self-service and informational tools, including expanded mobile functionality and an enhanced global travel website.

After centralizing its U.S. meetings program with StarCite in recent years, the company has continued to expand its meetings management program to other countries. Deutsche Bank this year also has worked to deploy a new risk management tool.

Deutsche Bank's consolidated U.S. agency is HRG, while the company uses American Express in Asia and BCD in Europe.

34 **KPMG** MONTVALE, N.J.

2010 U.S.-BOOKED AIR VOLUME:

\$90 million

PREFERRED VENDORS: American, Delta; Marriott, Hilton, Starwood; Hertz, Avis; American Express CTO, GetThere

CONSOLIDATED U.S. AGENCY:

American Express

Business auditing company KPMG raised its U.S. point-of-sale air spending 20 percent from the \$75 million it spent in 2009, according to *BTN* estimates.

Even so, the firm continued efforts to contain travel expenses through promoting remote conferencing and enforcing travel policy compliance. With mandates in place to use preferred hotels wherever applicable and nonrefundable airfares for all internal travel and meetings, KPMG also continued to require pre-trip approval for all international travel, the use of purpose-of-trip coding on the front end and the use of its Travel Tracker tool on the back end. The professional services firm and Big

Four auditor continued to raise its adoption of online booking and required meeting attendees to book their air travel through the Group CTO reservation system.

BCD Travel provides travel agency services to KPMG's member firms in Denmark, Kuwait and Luxembourg. Travelers use the Diners Club/MasterCard payment system network.

Globally, KPMG's member firms in 2001 reported a 2.6 percent increase in sales in 2010 to \$20.6 billion.

Revenues in the United States, where 23,000 employees work out of 87 offices, increased to \$6.37 billion in 2010 from \$6.31 billion in 2009. Its 138,000 employees serve clients in more than 150 countries.

35 **PEPSICO** PURCHASE, N.Y.

2010 U.S.-BOOKED AIR VOLUME: \$89.3 million

CONSOLIDATED U.S. AGENCY: BCD Travel

PepsiCo last year grew its U.S.-booked air volume by more than \$5 million, according to *BTN* estimates.

The beverage and snack conglomerate last year employed

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more than 285,000 people, generating \$60 billion in revenues through brands including Lay's, Tropicana, Gatorade and its namesake, Pepsi.

PepsiCo in late 2009 entered into an agreement with Anheuser-Busch to jointly purchase some indirect goods and services in the United States, including information technology hardware, office supplies, and travel and transportation services.

PepsiCo's U.S. travel program is consolidated with BCD Travel, which the company also uses in some countries outside the United States. HRG Worldwide also is used in other countries outside of the United States.

36 MCKINSEY NEW YORK

2010 U.S.-BOOKED AIR VOLUME: \$87 million

PREFERRED VENDORS: American Airlines, British Airways, Star Alliance, Hertz, American Express Commercial Card

CONSOLIDATED U.S. AGENCY: American Express

McKinsey is in the midst of a global American Express travel management company service rollout, with more than 50 nations already implemented.

The firm replaced HRG in the United Kingdom and Carlson Wagonlit Travel in Germany.

BTN estimates McKinsey's travel volume expanded in 2010 from 2009 levels.

37 CHEVRON SAN RAMON, CALIF.

2010 U.S.-BOOKED AIR VOLUME: \$85 million

COMPANYWIDE BOOKED AIR VOLUME: \$197 million

COMPANYWIDE T&E: \$295 million

PREFERRED VENDORS: Continental, United, Singapore Airlines; Marriott, Hilton, Hyatt; Avis, Budget, Enterprise; Concur Cliqbook; IBM

CONSOLIDATED U.S. AGENCY: Carlson Wagonlit Travel

For gasoline production giant Chevron, a better understanding of its travel management policy was a key focus in 2010. Although there were no written changes to the policy, a stronger emphasis on sticking to the regulations was enforced by senior management and through traveler communications.

The company pushed advanced-purchase requirements and greater compliance to preferred suppliers.

This year, Chevron is focused on benchmarking and refreshing the travel policy.

Chevron also is looking to consolidate its regional travel management companies and will continue to implement its online booking tool, Cliqbook, internationally.

Chevron is aiming to roll out a strategic meetings management program and associated technology tool.

38 HONEYWELL MORRISTOWN, N.J.

2010 U.S.-BOOKED AIR VOLUME: \$80 million

COMPANYWIDE BOOKED AIR VOLUME: \$138 million

U.S. T&E: \$182 million

COMPANYWIDE T&E: \$352 million

PREFERRED VENDORS: United Continental, Delta, US Airways; Hilton, Marriott, InterContinental; National; GetThere, Concur Cliqbook; Concur Expense

CONSOLIDATED U.S. AGENCY: American Express

Despite an overall increase in travel and entertainment spending, industrial and consumer supplies conglomerate Honeywell in 2010 generated savings in its travel program through successful negotiations and improved compliance.

The company's U.S.-booked air volume increased by 33 percent compared with 2009 levels. U.S. T&E spending was up 23 percent, and global T&E increased 25.2 percent.

Honeywell in 2010 negotiated year-over-year rate reductions for its hotels and completed the request-for-proposal process for its agency. American Express remains the company's consolidated U.S. agency. Amex, BCD Travel and Carlson Wagonlit Travel all provide services for travelers outside of the United States.

The company also reported savings from improved compliance. Use of its online booking tool—GetThere in the United States and Cliqbook elsewhere—was at 90 percent in the United States, and increased by double-digit percentages in Europe, the Middle East and Africa. Honeywell this year is pushing for further adoption increases in that region.

Additionally, Honeywell this year is reviewing its global airline program, launching a meetings management tool in EMEA and Asia/Pacific and consolidating reservations in Western Europe to a single service center.

Honeywell updated its global travel policy in 2010 to clarify guidelines and fill existing gaps, but made no significant changes. The company does not expect any major policy changes this year.

39 MEDTRONIC FRIDLEY, MINN.

2010 U.S.-BOOKED AIR VOLUME: \$79.2 million

COMPANYWIDE BOOKED AIR VOLUME: \$135.3 million

U.S. T&E: \$236.2 million

COMPANYWIDE T&E: \$340.3 million

PREFERRED VENDORS: Delta, United, American; Marriott, Hilton, Starwood; National, Avis, Enterprise; GetThere, Amadeus E-Travel; AdSoft Expense Express

CONSOLIDATED GLOBAL AGENCY: American Express

Medical device manufacturer Medtronic is focusing on data enhancements and leveraging spending with key suppliers as travel

and entertainment spending ticked upward in 2010.

U.S.-booked air volume increased by 31 percent year over year, while U.S. travel and entertainment spending overall was up 24 percent. Globally, T&E spending was up 20 percent.

Medtronic was able to capture and consolidate more of its spending last year through increased use of its corporate card—issued by American Express through an individually billed, centrally paid configuration—and meeting cards. In doing so, Medtronic analyzed and leveraged spending with preferred suppliers as well as identify employees whose travel behaviors needed modification.

This year, Medtronic aims to decrease travel spending and further leverage its volume with select suppliers. The company is reducing expenses by tightening restrictions on class of service on both domestic and international flights. Medtronic this year also is using new global templates and scorecards to look for ways to make travel management more efficient.

40 L-3 COMMUNICATIONS NEW YORK

2010 U.S.-BOOKED AIR VOLUME: \$78 million

CONSOLIDATED U.S. AGENCY: None

Communications and electronic systems defense contractor L-3 Communications' U.S. booked air volume in 2010 was \$78 million, according to *BTN* estimates.

Although L-3 Communications' net income increased in 2010 to \$966 million from \$911 million in 2009, 2010 net sales were slightly down to \$15.7 billion from \$16 billion the year before.

Meanwhile, L-3 Communications' employee headcount fell to 63,000 in 2010 from 67,000 in 2009, according to the company's financial reports.

41 TIME WARNER NEW YORK

2010 U.S.-BOOKED AIR VOLUME: \$77.5 million

PREFERRED VENDORS: United, Delta; Avis, Hertz, Enterprise; Clqbook, Concur

CONSOLIDATED U.S. AGENCY: None, BCD Travel is primary

BTN estimates a \$1 million increase in Time Warner's U.S.-booked air spending in 2010 from 2009 levels.

BCD Travel serves about 90 percent of the company's travel operations; Time Inc. uses Carlson Wagonlit Travel.

The company recently completed the consolidation of Time Warner's travel and expense systems into a single, global platform hosted by Concur's hosted travel and expense solutions.

Repositioning the firm in recent years, Time Warner now holds significant operations in publishing, film and especially television. Among Time Warner's holdings are Turner Networks—including CNN, TNT and Cartoon Network—Home Box

Office, Cinemax and Warner Bros. Entertainment. The company reported 32,000 employees at year-end.

42 ELI LILLY AND CO. INDIANAPOLIS

2010 U.S.-BOOKED AIR VOLUME: \$73.6 million

CONSOLIDATED GLOBAL AGENCY: BCD Travel

BTN estimates that pharmaceutical conglomerate Eli Lilly in 2010 raised its U.S.-booked air volume by about \$3.6 million from 2009 levels.

According to its annual report, Eli Lilly restricted its executive officers' ability to use corporate aircraft. For example, executive officers no longer were permitted to use the jet for personal use or to attend events other than board meetings. However, CEO John Lechleiter still was allowed to use the aircraft for personal use.

Eli Lilly in 2010 employed approximately 38,350 employees worldwide, down from 40,360 in 2009. In 2010, the company reported net income of \$5.07 billion, up about 17 percent from the year before.

43 BARCLAYS LONDON

2010 U.S.-BOOKED AIR VOLUME: \$73.4 million

PREFERRED VENDORS: American, British Airways, Delta, Continental; Hertz, Avis; Concur Clqbook

CONSOLIDATED U.S. AGENCY: None, BCD Travel is primary

Barclays in 2010 increased its U.S.-booked air volume from \$61.7 million in 2009, according to *BTN* estimates.

Overall spending on travel and accommodation at the company, which has a presence in 50 countries, last year grew to £358 million from £273 million in 2009, according to the banking giant's annual report. The growth followed a £2 million decline in travel spend in 2009 from 2008 levels.

Amid the global financial crisis at the end of 2008, Barclays acquired former CT100 stalwart Lehman Brothers for \$1.75 billion, helping to cement the firm's position as one of the top 100 spenders on corporate travel from U.S. points of sale. Barclays last year employed nearly 147,500 people worldwide, up from 144,200 in 2009.

The Institute of Travel Management in 2009 awarded Bronze Icarus accreditation to Barclays for its efforts in sustainable travel and meetings practices. "To win the accreditation, Barclays had to provide evidence of its targets and processes in line with the Project Icarus pledge to reduce emissions from travel and meetings by 60 percent before 2050," Barclays noted in its sustainability report.

Among those efforts, Barclays in recent years has attempted to measure and offset the environmental impact of its travel, while

expanding the use of remote conferencing by building on the more than 1,000 videoconferencing systems in offices worldwide. Barclays reported that some offices have reduced travel costs by as much 30 percent as a result. Additionally, the company has upgraded older systems to include high-definition options. Barclays also has grown the use of hybrid and electric vehicles in its corporate automobile fleet in the United Kingdom.

The company last year purchased 1,192,000 credits for projects in Brazil, China, India, South Korea, Tanzania, Kenya and Thailand to offset "global carbon emissions from energy use and travel" in 2009 and 2008.

44 CATERPILLAR

PEORIA, ILL.

2010 U.S.-BOOKED AIR VOLUME: \$72 million

COMPANYWIDE BOOKED AIR VOLUME: \$98 million

U.S. T&E: \$164 million

COMPANYWIDE T&E: \$221 million

PREFERRED VENDORS: American, United, Delta; Hilton, InterContinental, Marriott; National, Enterprise; Concur Cliqbook, Amadeus e-Travel

CONSOLIDATED U.S. AGENCY: BCD Travel

Heavy equipment manufacturer Caterpillar, which in 2010 increased its companywide travel and entertainment spending volume by more than 70 percent from 2009 levels, last year began requests-for-proposal processes for global airline, travel management company and expense reporting services.

The company in 2010 used BCD Travel as its consolidated agency in the United States, and used BCD and HRG Worldwide elsewhere. This year, Caterpillar plans to consolidate globally with a single TMC and address its global preferred airline program.

Caterpillar in 2010 continued to use a homegrown expense reporting system, but plans to implement a new tool in 2011. The company's travelers carry U.S. Bank Visa corporate cards.

The company this year plans to strengthen language in its travel policy that prevents the use of nonpreferred suppliers.

45 DELL

ROUND ROCK, TEXAS

2010 U.S.-BOOKED AIR VOLUME: \$70.6 million

CONSOLIDATED GLOBAL AGENCY: None; uses American Express and Carlson Wagonlit Travel

BTN estimated that Dell slightly increased its U.S.-booked air volume over 2009 spending. Dell uses American Express as its primary U.S. agency for three-quarters of air spending, but Carlson Wagonlit Travel handles about 25 percent, or \$17.8 million, of the air volume.

In November 2009, Dell acquired Perot Systems for \$3.9 billion and added 23,800 employees. It since has bought several more

companies. For its last fiscal year, Dell reported "record-breaking" revenues of \$61.1 billion, 16 percent more than a year earlier, including the impact of acquisitions. A key driver was a new consulting unit, Dell Services, formed after the Perot acquisition that generated \$7.7 billion in global sales and included 43,000 team members. Dell's total headcount at year-end was 103,000, including 3,000 temporary employees, with 36,900 located in the U.S. and 63,400 in other countries.

In its code of conduct, Dell required employees "to ensure that their business travel is intended to further Dell's business interests, and that travel and entertainment expenditures are reasonable, prudent and in accordance with applicable corporate or regional policies."

Dell chairman and CEO Michael Dell owns a private plane through wholly owned entities and the company annually reimburses for "covered variable costs, plus a pro rate portion of the management fee attributable to Dell's business travel" on the aircraft. In its last fiscal year, the company paid nearly \$2.9 million in such costs and fees.

45 GENERAL MOTORS

DETROIT

2010 U.S.-BOOKED AIR VOLUME: \$70.6 million

COMPANYWIDE BOOKED AIR VOLUME: \$127 million

U.S. T&E: \$111 million

COMPANYWIDE T&E: \$191.4 million

CONSOLIDATED GLOBAL AGENCY: American Express

Growing again after its 2010 return to the stock market—post bankruptcy reorganization, government bailouts and drastic spending reductions in 2009—General Motors also resumed business travel. U.S.-booked air volume rebounded 76 percent year over year, after a 60 percent drop in 2009. Worldwide booked air rose \$52 million from a year earlier, a 62 percent increase. T&E grew by 48 percent in the U.S. and 53 percent companywide.

GM for 2010 reported \$135.6 billion in revenue, \$4.7 billion in profits and more than 209,000 employees in 120 countries.

Nearly all GM U.S.-booked air travel flowed through its consolidated global agency American Express' GetThere online booking tool. The company this year expects to negotiate a new global travel management agreement and has reviewed class-of-service policies for international travel. An expense policy dated July 12, 2011, on the company's website stipulates that "intercontinental [and intracontinental] flights generally in excess of eight hours are eligible for a higher-class fare" than the "lowest cost economy fare" booked in advance. GM's CEO and his direct reports, as well as the board, are eligible for higher-class fares regardless of flight duration, according to the policy. GM has posted its expense policy since 2009 as required by the government bailout. The company last year implemented a rigorous process that required senior leadership approval prior to travel.

The company in late 2010 chartered jets to make its public offer-

ing pitch to investors. GM in 2009 sold its fleet of company jets after executives were chastised for flying to Washington, D.C., in them to request a federal bailout.

The new policy states: "GM generally does not permit the use of privately owned, privately operated, leased or charter aircraft for business functions. Such instances are permissible only as is economically justified with supporting business rationale" and require prior approval from a regional president or the CEO.

47 SCIENCE APPLICATIONS INTERNATIONAL CORP.

MCLEAN, VA.

2010 U.S.-BOOKED AIR VOLUME: \$70 million

COMPANYWIDE BOOKED AIR VOLUME: \$76 million

U.S. T&E: \$225 million

COMPANYWIDE T&E: \$235 million

PREFERRED VENDORS: United, Delta; Hilton, Marriott, Hyatt; Hertz, Avis; GetThere

CONSOLIDATED GLOBAL AGENCY: Travel Management Partners

At engineering and technology firm Science Application International Corp., federal policies often are mirrored to help retain government contracts. As a result, SAIC in 2010 updated its travel policy, tweaking its definition of "lowest logical fare" to mean that travelers may book only lowest restricted air tickets. Previously, travelers booked the lowest refundable fare. Altering the policy generated significant savings for both SAIC and the government.

In 2010, SAIC's U.S.-booked air volume increased about \$2 million. SAIC is readying an implementation of the GetThere online booking tool affording travelers the option to book without agent assistance and therefore minimizing the number of new travel agent hires. SAIC does not plan to begin rolling out the tool companywide until 2012, but during the past year began to beta-test GetThere and is implementing some user recommendations. SAIC does not plan to mandate the use of the online booking tool.

47 UNITED NATIONS

NEW YORK

2010 U.S.-BOOKED AIR VOLUME: \$70 million

PREFERRED VENDORS: Delta, Air France, Lufthansa; GetThere

CONSOLIDATED GLOBAL AGENCY: American Express

After a request-for-proposals process that began in 2009, the United Nations last year retained American Express as its consolidated travel management services provider.

The U.N.'s 2010 U.S.-booked air volume rose about 8 percent from 2009 levels. About 95 percent of that volume is for international travel, and though the U.N. has a preferred relationship with GetThere through American Express, almost none of its travelers' trips are self-booked online.

The U.N. does not have a formal hotel or car rental program. Its travelers currently hold American Express corporate cards, but the U.N. is expected to switch to CitiBank by the end of 2011.

49 BP

LONDON

2010 U.S.-BOOKED AIR VOLUME: \$69.9 million

PREFERRED VENDORS: British Airways, American; GetThere

CONSOLIDATED U.S. AGENCY: Carlson Wagonlit Travel

BTN estimates BP further shrunk its 2010 U.S. booked air volume by \$90 million year over year, following a reduction of \$65 million in 2009. The company in 2010 expanded the implementation of GetThere to more countries, after the 2009 rollout in the United States, Canada, Hong Kong and Singapore.

Carlson Wagonlit Travel continued to serve as its primary agency, as it has done since 1996, but now services the firm, as well as other energy customers, through a dedicated team of more than 600 people with its own after-hours call centers in Houston and Singapore. The centers provide travel services, but also "traveler tracking and alerts in emergency, evacuation and repatriation situations and other crisis and risk-management assistance."

BP Procurement, including BP Travel Services, now is based in Houston instead of Chicago. Travel provides both sourcing and program management across a global program with regional accountabilities in the Americas, Europe, Middle East and Africa. The team is responsible for TMC, airline, rental car, chauffeured car, hotel and strategic meetings management. In program management, the unit provides management reporting and consulting expertise to business units, traveler and arranger training and support for the recently introduced meetings management program in the Americas. Expense reporting is handled by accounting.

50 APPLE

CUPERTINO, CALIF.

2010 U.S.-BOOKED AIR VOLUME: \$69 million

CONSOLIDATED U.S. AGENCY: BCD Travel

Despite a 52 percent increase in sales to \$65 billion, Apple during the fiscal year ending in September 2010 reported a 3 percent decrease in total carbon emissions for air travel, U.S. automobile fleet, and employee commuting.

Going into that fiscal year, the consumer technology manufacturer had continued to invest in travel despite the recent recession, reflecting its growth and the success of several product lines. Its attractiveness as a customer that uses premium classes helped the company secure highly competitive supplier deals.

Apple remains an ARC-accredited Corporate Travel Department. The company's travel policy is included in its general principles of business conduct, as provided to employees and partners.

51 **GLAXOSMITHKLINE**
LONDON**2010 U.S.-BOOKED AIR VOLUME:** \$67.13 million**COMPANYWIDE BOOKED AIR VOLUME:** \$170.9 million**U.S. T&E:** \$260.2 million**COMPANYWIDE T&E:** \$498.4 million**PREFERRED VENDORS:** British Airways, American, US Airways; Marriott, Hilton, Starwood; National, Enterprise, Hertz; Rearden; Extensity**CONSOLIDATED U.S. AGENCY:** None, BCD Travel is primary

GlaxoSmithKline increased its U.S.-booked air volume in 2010 while reducing overall travel and entertainment expenditures. While the pharmaceutical company's U.S.-booked air volume was 13 percent higher than 2009 levels, total U.S. travel and entertainment spending was down by 3 percent, and global T&E volume was down 6 percent.

Part of the savings came through a successful hotel sourcing project. The company's travel team continues its work on the hotel program this year, focusing on negotiating terms and conditions, and also is embarking on sourcing projects in the car rental and air categories.

Additionally, GSK has been tightening its meetings program, selecting in 2010 a new online meetings management tool and implementing it this year.

While GlaxoSmithKline does not have a consolidated U.S. agency, BCD Travel handles much of its business, and also serves as GSK's primary agency globally, with HRG also serving some GSK travelers.

Company travelers book through Rearden's online booking tool, and about 64 percent of the company's air volume went through the tool in 2010.

Travelers use American Express cards in an individual bill, individual pay configuration for expenses.

52 **ROYAL DUTCH SHELL**
THE HAGUE, THE NETHERLANDS**2010 U.S.-BOOKED AIR VOLUME:** \$67.1 million**PREFERRED VENDORS:** Continental, United; InterContinental, Starwood, Hilton; Avis, Enterprise; KDS; SAP**CONSOLIDATED U.S. AGENCY:** Carlson Wagonlit Travel

After reducing U.S. booked air volume by nearly 40 percent in 2009 from \$89 million in 2008, travel spend for global petrochemical company Royal Dutch Shell ticked up again last year, but not by nearly enough to reach previous peaks, according to *BTN* estimates.

Shell operates in more than 90 countries, some of which expose travelers to security risks, including social instability, terrorism and armed conflict. That has made traveler security a focal point of the travel program. In 2010, the travel team focused on conducting a complete policy review and ensuring a balance

between savings and employee safety.

Like other companies, Shell has sought to limit internal travel by implementing demand management strategies, including trip authorization procedures in some divisions and remote conferencing capabilities.

Carlson Wagonlit Travel is Shell's consolidated U.S. agency and also serves as the primary travel service provider internationally, though HRG handles some international points of sale.

The company in 2009 began a broad reorganization effort to implement a "simpler, leaner organizational structure with clearer accountabilities, enabling more customer focus and faster decision-making," according to its annual report. Those efforts led to the reduction of 7,000 positions, completed last year. The company employed approximately 93,000 people as of Dec. 31, 2010.

53 **CISCO SYSTEMS**
SAN JOSE, CALIF.**2010 U.S.-BOOKED AIR VOLUME:** \$66.2 million**COMPANYWIDE BOOKED AIR VOLUME:** \$126.8 million**COMPANYWIDE T&E:** \$419.8 million**PREFERRED VENDORS:** Star Alliance, SkyTeam, Oneworld; Hilton, Starwood, InterContinental; Hertz, Avis; GetThere; Oracle IExpense**CONSOLIDATED GLOBAL AGENCY:** American Express

Cisco's U.S. booked air volume last year grew from \$51.3 million in 2009, and the company continues to drive savings through supplier negotiations, increased online booking adoption, policy refinements and ongoing efforts to expand remote conferencing.

Cisco last year booked 85 percent of all U.S. air transactions through the GetThere online booking system, while the company achieved a global online adoption rate of 82 percent, the result of concerted efforts by the company's travel organization to increase usage.

This year, Cisco is driving more hotel bookings through preferred channels while improving hotel reporting. The company introduced a pre-trip approval policy for any air booking that does not include a hotel reservation.

Cisco last year negotiated corporate rate reductions with preferred rental car suppliers and negotiated minimal price increases with hotels, keeping rates only 2 percent higher this year versus 2010 for its core hotel program.

The company this year is seeking to renegotiate pricing with its travel management company.

Cisco tightened its meetings policies in 2009 by requiring senior vice president approval for all internal meetings. However, the company last year reassessed the policy and now requires vice president-level approval for such meetings. Cisco continues to drive usage of remote conferencing technologies, specifically its TelePresence and WebEx systems.

The American Express corporate card remains the preferred payment mechanism for Cisco employees.

54 INTERNATIONAL MONETARY FUND
WASHINGTON, D.C.**2010 U.S.-BOOKED AIR VOLUME:** \$65.8 million**PREFERRED VENDORS:** Air France, British Airways, All Nippon Airways; InterContinental, Hyatt, Hilton; Oracle PeopleSoft**CONSOLIDATED U.S. AGENCY:** American Express

American Express last year served as the International Monetary Fund's consolidated agency in the United States, but the organization now is in the midst of implementing a new preferred travel management company.

IMF, an organization of 187 countries whose goal is to promote global economic growth and stability, last year increased its U.S.-booked volume by about 18 percent. Only 6 percent of that volume is spent on travel to U.S. locations.

IMF in 2010 signed new airline contracts after a formal request-for-proposals process. Its policy mandates the use of preferred suppliers for air travel.

IMF travelers report their expenses through Oracle's PeopleSoft tool.

55 SCHNEIDER ELECTRIC
RUEIL-MALMAISON, FRANCE**2010 U.S.-BOOKED AIR VOLUME:** \$65.4 million**CONSOLIDATED U.S. AGENCY:** BCD Travel

Headquartered outside Paris, 170-year-old Schneider Electric in 2010 generated sales of \$27 billion, 24 percent more than the prior year. The growth came as part of a two-year strategy and included acquisitions. Nearly 40 percent of its 2010 revenues were generated in such emerging economies as Brazil, Russia, India and China.

The energy management firm has more than 118,800 employees at operations in more than 100 countries and 44 U.S. states plus Puerto Rico.

Its North American base is outside Chicago, where it houses an indirect procurement expert for travel. However, a team of buyers from multiple countries work with headquarters travel executives to define and implement global purchasing policies, employee travel policies and supplier contracts.

Schneider Electric with Carlson Wagonlit Travel in 2008 consolidated travel in Europe, the Middle East and Africa, Latin America and the Asia/Pacific region, while travel in the United States, Canada and Mexico was handled by BCD Travel. The company in 2011 rebid TMCs by region, and BCD retained the three North American countries and picked up France. Carlson Wagonlit Travel retained the rest of EMEA; awards for Asia at press time had not been announced.

In the United States, Schneider operates training centers in Boston, Dallas and Rockford, Ill.

56 MORGAN STANLEY
NEW YORK**2010 U.S.-BOOKED AIR VOLUME:** \$65 million**CONSOLIDATED U.S. AGENCY:** Carlson Wagonlit Travel

Financial services firm Morgan Stanley collects global data on energy and air travel spending and emissions, and in 2010 produced 27 percent more global business travel emissions than it did in 2009.

"We have a companywide directive to minimize business travel," according to company documents. "All business travel requires administrative approval, and videoconferencing is encouraged as an alternative."

56 SAP
WALLDORF, GERMANY**2010 U.S.-BOOKED AIR VOLUME:** \$65 million**PREFERRED VENDORS:** GetThere**CONSOLIDATED GLOBAL AGENCY:** BCD Travel

Ending its streak of significant cuts to its U.S. booked air volume in both 2008 and 2009, global enterprise software developer SAP trimmed a little more than \$2 million from its volume in 2010, according to *BTN* estimates.

Globally, SAP increased sales and marketing expenses by 20 percent year over year in 2010, citing increased travel and marketing expenses spurred by increased business activity. Total revenue was up 17 percent for the year. The firm in July 2010 acquired enterprise and mobile software supplier Sybase.

While SAP cut 2,983 positions in 2009, its total employees increased to 53,513 at the end of 2010 from 47,584 at the end of 2009, thanks in part to the Sybase acquisition.

58 CREDIT SUISSE
ZURICH**2010 U.S.-BOOKED AIR VOLUME:** \$62.3 million**COMPANYWIDE BOOKED AIR VOLUME:** \$194.5 million**PREFERRED VENDORS:** American, Continental, Delta; Starwood, Marriott, Hyatt; Hertz; Concur Cliqbook; Concur Expense**CONSOLIDATED U.S. AGENCY:** HRG

International financial services group Credit Suisse in 2010 raised its U.S.-booked air volume nearly 20 percent from 2009 and its companywide air volume by nearly one-third. A major increase in international activity accounted for the jump in spending, which could be seen in a shift in its mix of domestic versus international spending. In 2009, 60 percent of its U.S. air spending was for domestic travel. In 2010, 62 percent of that spending was for international airline tickets.

The group last year realized cost savings on its travel expenditures through, among other things, finalizing new airline deals. It also maintained the tighter premium-class restrictions imposed in 2009, when it eliminated first-class air travel altogether and mandated economy for flights outside the United States lasting three hours or less.

The company in 2010 also increased use of its online booking tool, Cliqbook, which it used to book 64 percent of its domestic transactions. About 60 percent of those transactions required no agent intervention.

In 2011, Credit Suisse implemented a new online booking tool, GetThere, in the United States and the United Kingdom, but continued to use Concur's expense reporting tool both inside and outside of the United States. The company also this year is conducting a travel management request for proposals.

HRG has served as Credit Suisse's consolidated agency in the United States and handles some of the firm's travel needs elsewhere. Other primary travel management companies outside the United States include American Express affiliate Flytour Business Travel in Brazil and Travel Trust International in Canada.

American Express issues corporate cards for Credit Suisse travelers on an individual bill, individual pay basis.

59 **BAE SYSTEMS INC.** LONDON

2010 U.S.-BOOKED AIR VOLUME: \$61.5 million

COMPANYWIDE BOOKED AIR VOLUME: \$175 million

U.S. T&E: \$150 million

COMPANYWIDE T&E: \$375 million

PREFERRED VENDORS: United, Delta, American; Marriott, InterContinental; Hertz, Enterprise; GetThere; Concur

CONSOLIDATED U.S. AGENCY: American Express

Aerospace and defense firm BAE Systems Inc. in 2010 for the first time rolled out a single companywide travel policy.

The company also last year furthered a 2009 effort to implement a single companywide meetings management structure with the introduction of telepresence facilities at 20 sites throughout the world. More such sites this year are expected to open, and BAE is exploring measures to increase their use.

American Express served as BAE Systems Inc.'s consolidated U.S. travel agency in 2010; the company since has selected BCD Travel as its new U.S. TMC. Amex serves as BAE's U.S. preferred corporate card vendor.

BAE, which lowered its U.S.-booked air volume by about 6 percent from 2009 levels, last year renegotiated all its airline agreements, maintaining its three largest preferred carriers. Meanwhile, BAE this year is pushing to decrease by 20 percent the number of air tickets booked less than seven days before departure.

About half of BAE's U.S. air transactions in 2010 were booked online through preferred self-booking tool GetThere, a figure the company is trying to increase in 2011 by 15 percent.

60 **ZURICH INSURANCE** SCHAUMBURG, ILL.

2010 U.S.-BOOKED AIR VOLUME: \$60 million

PREFERRED VENDORS: United, Air Canada, Delta, Porter, Southwest

CONSOLIDATED U.S. AGENCY: American Express

A subsidiary of Swiss insurance giant Zurich Financial Services, Zurich Insurance represents its parent's North America Commercial unit as a provider of commercial property/casualty insurance in the United States and Canada. The parent company had more than 60,000 employees in more than 170 countries in 2010, when its total revenue was \$68 billion, down from \$70 billion in 2009.

The company offers a range of insurance coverage. Zurich American Insurance's products include general liability, commercial auto, umbrella coverage, workers' compensation, and inland marine policies as well as industry-specific offerings, including travel risk management and Zurich Travel Assist, a global travel assistance program that offers accident and health insurance plans.

61 **EMC** HOPKINTON, MASS.

2010 U.S.-BOOKED AIR VOLUME: \$59 million

PREFERRED VENDORS: United, American, Delta, Air Canada; National; Galileo; Concur Cliqbook; Concur Expense

CONSOLIDATED GLOBAL AGENCY: American Express

After two consecutive years of drastic cuts to its travel spending, EMC Corp., the data management and storage systems provider, raised its North American point-of-sale air spending last year by nearly \$17 million.

The company's total booked air volume last year exceeded \$122 million.

Meanwhile, the company raised its number of employees to 48,500 in 2009 from 43,200 in 2009 as its sales climbed 21 percent to \$17 billion.

EMC raised the global use of its Cliqbook online booking tool last year, which it requires employees to use for all domestic travel. It also implemented online booking in additional countries in Europe, the Middle East and Africa.

EMC also further advanced its auditing and compliance with policy and preferred vendors.

It continued to use American Express as its consolidated global agency and provider of more than 10,000 cards.

This year, the company continued to drive online booking adoption and to find further opportunities for cost avoidance. It also reinstated the use of business class in air travel for specific purposes.

61 **MOTOROLA**
SCHAUMBURG, ILL.**2010 U.S.-BOOKED AIR VOLUME:** \$59 million**COMPANYWIDE BOOKED AIR VOLUME:** \$112 million**PREFERRED VENDORS:** United; Avis; GetThere; Oracle**CONSOLIDATED U.S. AGENCY:** American Express

For Motorola, the focus in 2010 was working with suppliers in anticipation of its pending split into two independent companies: the Libertyville, Ill.-based Motorola Mobility, which includes its mobile devices and home divisions, and Motorola Solutions, which includes the company's business services such as police radios and barcode scanners. The company finalized the split in January 2011.

In August, Google announced the intent to acquire Motorola Mobility for about \$12.5 billion.

While still part of a single company, the two Motorola units' 2010 U.S. air volume increased by 25.5 percent compared with 2009 levels. Companywide air volume was up 16.7 percent.

American Express served as Motorola's consolidated agency in the United States as well as its primary agency outside of the country, with HRG also serving some travelers. American Express also provided corporate cards for Motorola travelers.

Travelers used GetThere to book air travel both inside and outside the United States, and Motorola reported a 94 percent compliance level to the tool within the United States in 2010.

63 **INTEL**
SANTA CLARA, CALIF.**2010 U.S. BOOKED AIR VOLUME:** \$57.3 million**COMPANYWIDE BOOKED AIR VOLUME:** \$105.6 million**U.S. T&E:** \$174 million**COMPANYWIDE T&E:** \$277 million**CONSOLIDATED GLOBAL AGENCY:** American Express

Intel Corp. upped its 2010 U.S. booked air volume from \$30 million the year before and doubled its companywide booked air volume. Intel also began reporting its carbon dioxide output in 2010 as part of its latest corporate social responsibility efforts.

In an effort to reduce its carbon footprint, Intel cut business trips and increased its number of videoconferencing rooms, which Intel estimated saved \$26 million in travel expenses, according to its 2010 financial report. Intel also requested that its travel service supplier label green hotels in their displays and worked with its rental car suppliers to up the number of available hybrid and fuel-efficient cars.

Intel also launched an official global emergency response process in which travelers can reach out to a third-party security provider for assistance if needed. Intel utilizes a mobile strategy to text message travelers any traveler alerts or to contact them in times of crisis.

Meanwhile, Intel introduced other initiatives in 2010, including the rebooking of unused nonrefundable airline tickets.

Intel is currently gathering an increasing amount of data from multiple sources and utilizing credit card and reimbursement data. Intel travelers are not required to book domestic travel on their corporate cards, which presents a data-tracking challenge.

64 **KRAFT FOODS**
NORTHFIELD, ILL.**2010 U.S.-BOOKED AIR VOLUME:** \$54 million**COMPANYWIDE BOOKED AIR VOLUME:** \$122 million**U.S. T&E:** \$149 million**PREFERRED VENDORS:** United, Delta; Hilton, Marriott, Starwood; National, Enterprise, Hertz; Concur Cliqbook, Amadeus e-Travel; IBM GERS**CONSOLIDATED U.S. AGENCY:** BCD Travel

Kraft Foods in 2010 began a nine-phase transition to a globally consolidated travel management program in 72 countries. By January 2011, just 20 countries in its Central and Eastern Europe, Middle East and Africa region and three in Asia/Pacific were left to bring into the program by May. Kraft's U.S.-booked volume rebounded nearly 75 percent from \$30.9 million last year. Companywide T&E rose more than 60 percent from 2009.

Kraft's plan called for a global transformation of the end-user traveler experience—from profile creation and booking through expense reporting—development of an interactive global travel intranet site and duty-of-care plan, and use of mobile technology.

In July 2010, the company introduced a global travel policy that integrated prior versions of Kraft and newly acquired Cadbury rules, but also mandated card and TMC use and included regional policies to reflect cultural or legal travel and expense variances. The company selected booking tools by region with Amadeus e-Travel in most of Europe, Concur in North America and most major markets outside of Europe, GetThere in one country and BCD proprietary tools in China and Brazil. In France, employees use Expedia's Egencia. In the United States, online adoption of Cliqbook was 85 percent.

BCD Travel won the global Kraft contract in March 2010 and implementation began in June. The company previously used American Express as its primary TMC, with Carlson Wagonlit Travel in Latin American and other agencies elsewhere. In April 2010, Kraft outsourced all indirect spend procurement, including travel, to Capgemini. Consultants, as well as internal procurement managers in other regions, work with Kraft travel management on sourcing strategies to best leverage spend, and together they delivered 6 percent annual savings.

Kraft this year has focused on registering all meetings, improving global travel service and enhancing global data reporting and a communications strategy. Kraft planned to add trip purpose detail to its daily manager exception reporting and change its business class policy to flights of six hours or more instead of five.

64 NIKE BEAVERTON, ORE.

2010 U.S. BOOKED AIR VOLUME: \$54 million

COMPANYWIDE BOOKED AIR VOLUME: \$87 million

COMPANYWIDE T&E: \$145 million

PREFERRED VENDORS: Marriott, Hilton; Hertz, National, Enterprise, Budget; Concur Cliqbook; Amadeus e-Travel; Infor

CONSOLIDATED GLOBAL AGENCY: BCD Travel

Global athletics apparel producer Nike spends roughly 66 percent of its overall corporate travel on international trips. Much of Nike's focus in 2010 was ramping up travel in order to achieve corporate strategic goals and objectives and increase overall sales revenue.

In 2010, Nike upped its U.S. booked air volume from \$31.4 million the year before, and companywide booked air volume increased from \$50 million in 2009.

Meanwhile, Nike also switched its consolidated global travel agency from BTI, a former joint venture of BCD Travel and HRG Worldwide, to BCD Travel alone.

This year, Nike's goals are to add additional global air agreements and to implement additional clarifications surrounding ancillary fee reimbursement.

66 DOW CHEMICAL MIDLAND, MICH.

2010 U.S.-BOOKED AIR VOLUME: \$53.6 million

COMPANYWIDE BOOKED AIR VOLUME: \$97 million

PREFERRED VENDORS: Continental, United, Delta; InterContinental, Hilton, Marriott; Avis, National, Hertz; Concur Cliqbook, Amadeus e-Travel; Concur Expense

CONSOLIDATED U.S. AGENCY: BCD Travel

Dow Chemical had a significant rebound in travel in 2010, increasing its U.S. booked air volume by 67 percent, putting it above levels reported in 2008. Companywide booked air volume increased at about the same rate. Dow Chemical reduced agency fees in 2010 and improved traveler compliance, including use of its U.S. online booking tool, Cliqbook, through which 66 percent of U.S. flights were booked in 2010.

This year, Dow Chemical aims to push compliance higher and drive more savings, possibly through an evaluation of its meetings program. The company also this year has begun using senior-level travel management executive dashboards to monitor progress.

BCD Travel serves as Dow Chemical's consolidated U.S. agency, but all mega agencies have a piece of its business. Carlson Wagonlit Travel serves as Dow Chemical's primary agency outside of the United States, and American Express and HRG each hold some business as well.

Citi issues Dow corporate cards in the United States.

67 NEWS CORP. NEW YORK

2010 U.S.-BOOKED AIR VOLUME: \$53.1 million

COMPANYWIDE BOOKED AIR VOLUME: \$73 million

PREFERRED VENDORS: American, Delta, United Continental; Hilton, Marriott, Starwood; Hertz, National, Enterprise; GetThere

CONSOLIDATED GLOBAL AGENCY: HRG North America

Air volume increased by 30 percent in the United States and globally at News Corp. in 2010. The company last year persuaded the majority of its U.K. business units to use its designated global online booking tool, GetThere. In the United States, 60 percent of bookings are made through the tool.

The company's travel team last year also renegotiated all preferred airline contracts, issued a chauffeured transportation request for proposals and expanded the corporate card program to Australia.

News Corp.'s focus this year has been on an agency RFP, evaluation of its online booking tools, online hotel directory, car rental rate renegotiation and expansion of the corporate card program in Europe.

While it doesn't have a single consolidated global agency, News Corp. in 2009 consolidated travel management in the United Kingdom and Germany with subsidiaries of HRG Worldwide, which also services the company in the United States.

Globally, News Corp. also relies on Carlson Wagonlit Travel and Corporate Travel Management. News Corp.'s 2010 European air volume was \$13 million.

68 COCA-COLA ATLANTA

2010 U.S.-BOOKED AIR VOLUME: \$52.1 million

CONSOLIDATED GLOBAL AGENCY: Carlson Wagonlit Travel

With roughly 140,000 employees worldwide, beverage giant Coca-Cola's U.S. booked air volume totaled \$52.1 million in 2010, according to *BTN* estimates.

Coca-Cola has implemented a gaming element in its travel management program, pitting corporate travelers against one another and scoring their travel booking patterns. Travelers were ranked monthly; those with a low score were given opportunities to improve it, but they still were singled out to senior management.

The company's point system began in 2006 and since its inception, Coca-Cola travelers' use of the corporate online self-booking tool grew 28 percent, use of preferred hotels increased 16 percent and seven-day advance air bookings upped 12 percent. However, Coca-Cola's hotel attachment rate increased only 5 percent, and bookings using the lowest logical fare rose just 3 percent.

69 MARSH & MCLENNAN
NEW YORK**2010 U.S.-BOOKED AIR VOLUME:** \$51 million**COMPANYWIDE BOOKED AIR VOLUME:** \$81 million**U.S. T&E:** \$135 million**COMPANYWIDE T&E:** \$296 million**PREFERRED VENDORS:** Delta, Air France-KLM, United, Continental; Starwood, Marriott, Hilton; Enterprise, National, Hertz; GetThere, KDS; Oracle IExpense**CONSOLIDATED U.S. AGENCY:** BCD Travel

Marsh & McLennan in the past year has continued to consolidate travel management services with BCD Travel. After rolling out the travel management company in late 2008 in North America and the United Kingdom, other European and Middle Eastern countries have followed and the company is planning further consolidation in Latin America and Asia/Pacific.

Marsh & McLennan has deployed a consultative travel management structure through which the travel organization recommends methods to maximize savings, ensure traveler security and improve productivity. The company is working to boost compliance to travel policy. The company this year began examining a strategic meetings management program.

Marsh & McLennan's U.S. booked air volume last year grew to from \$43.7 million in 2009. The company in 2010 achieved nearly 80 percent overall online booking adoption using the GetThere tool in the United States. Meanwhile, KDS is the booking tool of choice in Europe, the Middle East and Africa.

Marsh & McLennan travelers carry the American Express corporate card for travel expenses, which are reported through the Oracle IExpense system.

70 HSBC
LONDON**2010 U.S.-BOOKED AIR VOLUME:** \$50 million**CONSOLIDATED U.S. AGENCY:** Egencia

Travel reductions that accompanied the economic downturn helped HSBC reduce air travel spending in 2009, but the banking firm saw corporate air traffic grow more than 20 percent last year amid a banking rebound.

HSBC in 2009 set targets to reduce in three years carbon dioxide emissions by 20 percent per full-time employee. To reduce demand for air travel, the company has invested in remote conferencing capabilities, including telepresence suites and other tools, while also encouraging rail travel where applicable. HSBC last year expanded the number videoconferencing facilities by more than 200 percent worldwide, while doubling average monthly usage from 2009. The company reported 142,000 tons of travel-related CO2 emissions in 2010. Though emissions grew from 2009, they were down from

the 166,000 tons reported in the baseline year of 2008.

The company's travel department this year expects to reduce travel costs and negotiate a global air program. The company did not institute any major changes to policy last year.

70 OMNICOM
NEW YORK**2010 U.S.-BOOKED AIR VOLUME:** \$50 million**COMPANYWIDE BOOKED AIR VOLUME:** \$73 million**PREFERRED VENDORS:** American, Delta; Budget, Hertz; Concur Cliqbook**CONSOLIDATED U.S. AGENCY:** None, uses Carlson Wagonlit Travel and BCD Travel

Marketing and advertising conglomerate Omnicom this year expanded its travel management program to its Latin American operations. The firm is introducing the program one country at a time; the first, Brazil, is slated to be implemented by year-end.

Omnicom in 2010 completed a request-for-proposals process for U.S. travel management services that it began in 2009. The company retained Carlson Wagonlit Travel as one vendor, holding about half of Omnicom's domestic air volume, but in July 2010 switched its other provider to BCD Travel from HRG.

Omnicom last year also changed its preferred online booking tool in the United States to Cliqbook from GetThere. The company slightly raised its share of applicable domestic transactions booked online to 5 percent; low adoption rates are typical in Omnicom's line of business.

The company last year increased its 2010 travel and entertainment spending in the United States by less than 6 percent from its 2009; its U.S.-booked air volume rose by about 19 percent. The company slightly tightened some air policies in 2010, shifting applicable acceptable classes of service from first class to business class, and from business class to premium economy. Omnicom also shifted its advance-booking requirement to 14 days before departure from seven.

Bank of America serves as Omnicom's preferred U.S. corporate card provider.

70 SANOFI-AVENTIS
PARIS**2010 U.S.-BOOKED AIR VOLUME:** \$50 million**U.S. T&E:** \$95 million**PREFERRED VENDORS:** Continental, Delta, US Airways; Marriott, Hilton, Residence Inns; Avis, Enterprise; Concur**CONSOLIDATED U.S. AGENCY:** BCD Travel

With a \$2 million reduction in its U.S. booked air volume and a \$10 million cut in U.S. travel and entertainment expenses from 2009, European pharmaceutical company Sanofi-Aventis in 2010 continued to control costs for its North American travel program,

which it implemented the year before along with an online expense management system and newly harmonized policies. In addition, the company implemented hotel rate caps and an enhanced air management program last year.

This year, it is working in North America to implement a strategic relationship management program, launch a traveler information portal, strengthen its traveler safety program and implement a strategic meetings management program.

Sanofi-Aventis in 2010 substantially raised the use of its Concur Cliqbook online booking tool in the United States to more than 95 percent, 92 percent of which was done without agent intervention. It also increased remote conferencing use.

BCD Travel provides Sanofi-Aventis with travel management services in the United States and some other locations. American Express and HRG Worldwide also provide international travel services. Sanofi-Aventis issues to U.S. travelers Amex cards.

70 UNITEDHEALTH GROUP MINNETONKA, MINN.

2010 U.S.-BOOKED AIR VOLUME: \$50 million

PREFERRED VENDORS: Delta, American, US Airways; Marriott, Hilton, InterContinental; Hertz, Enterprise, Concur

CONSOLIDATED U.S. AGENCY: American Express

UnitedHealth Group spending on U.S. booked air spiked 42 percent last year and overall travel and entertainment spending increased 19 percent to \$122 million. While no policy changes occurred in 2010, company officials this year examined cell phone policies and per diems.

Within the United States, the insurance and health care company consolidated travel with American Express. More than 80 percent of bookings from U.S. points of sale are for domestic U.S. travel and more than 70 percent of its bookings are made via its Concur Travel & Expense tools. Outside the United States, employees book travel with American Express and Carlson Wagonlit Travel and on internet sites. In Europe, the company in 2010 had air volume of \$2.6 million.

74 WALMART BENTONVILLE, ARK.

2010 U.S.-BOOKED AIR VOLUME: \$49.7 million

PREFERRED VENDORS: American, Delta, Continental, Cathay Pacific, Japan Airlines; La Quinta, Choice, InterContinental, Best Western; Avis, National, Enterprise; GetThere; Appticity

CONSOLIDATED U.S. AGENCY: Wal-Mart Stores Inc. Corporate Travel Department

Retail giant Walmart, with an increase of more than \$15 billion in sales to \$421 billion in fiscal 2011, saw its U.S.-booked air volume rebound to just shy of \$50 million after falling from that number

in 2008 to \$34.1 million in 2009.

The focus of Walmart's travel program in 2011 is on enhancing the customer experience through technology and consolidating traveler information. The company's travelers use a Citibank corporate MasterCard, and Walmart also employs a Universal Air Travel Plan payment account for air purchases. Walmart continued to expand the use of the automated central billing of hotel payment with UATP, issuer American Airlines and preferred hotel supplier La Quinta, which it pioneered in the previous year.

Walmart's U.S. travel is consolidated under its own ARC-accredited corporate travel department. Outside of the United States, it uses some external travel agencies, including American Express and BCD in Latin America.

75 ITT CORP. WHITE PLAINS, NEW YORK

2010 U.S.-BOOKED AIR VOLUME: \$49.3 million

PREFERRED VENDORS: Continental, British Airways; Concur

CONSOLIDATED U.S. AGENCY: ITT Corp. Corporate Travel Department

ITT Corp. in 2010 had a *BTN*-estimated U.S.-booked air volume of \$49.3 million. An ARC-accredited Corporate Travel Department for nearly a decade, ITT has its own agents in Palm Coast, Fla., to assist with international and complex domestic itineraries. It long has used Concur's Cliqbook for online booking and Concur's expense reporting tools. Agents use the Sabre global distribution system and, for traveler security, International SOS.

ITT reported 2010 revenue of \$11 billion and net income of \$654 million. In January 2011, the company announced plans by year-end to separate into three distinct, publicly traded companies: one focused on defense and information solutions, one on water-related businesses and one a manufacturer of highly engineered industrial products that will continue to use the ITT Corp. name. To support these new entities, the company at press time posted several corporate travel and expense positions, located in Bridgeport, Conn., Palm Coast, Fla., and Seneca Falls, N.Y. The company operates its own fleet of corporate aircraft.

76 EMERSON ELECTRIC ST. LOUIS

2010 U.S.-BOOKED AIR VOLUME: \$48.9 million

PREFERRED VENDORS: Avis, National, Enterprise; GetThere; Oracle

CONSOLIDATED GLOBAL AGENCY: None

Headquartered in St. Louis, 121-year-old supplier of power and cooling systems Emerson Electric uses American Express and Carlson Wagonlit for travel management services.

As part of a communications effort in 2008—when annual global air spend was \$100 million—Emerson and its travel management companies used GetThere's dynamic messaging tools to urge

travelers and arrangers to use new preferred air carriers to shift market share and increase compliances.

To improve performance, compliance to using preferred travel suppliers, the online booking tool, advance purchase rules and other policies is tracked and shared quarterly with divisions, business units and senior management.

Emerson reported 2010 revenue of \$21 billion, up 5 percent from 2009, but lower than 2008's \$23.8 billion. Emerging markets delivered 34 percent of Emerson's sales, and international operations represented 57 percent.

Of the company's 127,700 workers worldwide, about 14,000 are travelers.

77 MCKESSON SAN FRANCISCO

2010 U.S.-BOOKED AIR VOLUME: \$48 million

PREFERRED VENDORS: Delta, American, US Airways, United, Air Canada; Hilton, InterContinental, Wyndham, Hyatt; Hertz, Avis; GetThere; SAP

CONSOLIDATED U.S. AGENCY: Travelocity Business

One of the very few Corporate Travel 100 companies that has consolidated travel with an Internet-originating travel management company, McKesson held steady from 2009 levels both its 2010 overall and U.S.-booked air volume.

The health care and information services provider has expanded the international reach of its booking tool and has worked to ensure that travelers have consistent online access to the most appropriate fares.

About 93 percent of eligible 2010 domestic transactions were booked online through approved channels.

McKesson uses Cisco's TelePresence high-definition videoconferencing technology at several locations in North America.

78 AT&T DALLAS

2010 U.S.-BOOKED AIR VOLUME: \$47.2 million

CONSOLIDATED GLOBAL AGENCY: American Express

Communications provider AT&T in 2010 experienced a spike in net income, reporting \$20.2 billion compared with \$12.4 billion in 2009.

Meanwhile, its 2010 U.S.-booked air volume increased slightly to \$47.2 million from \$41.6 million in 2009. However, AT&T employee headcount continued to decline year over year. In 2010, the number of AT&T employees decreased to 266,590 from 282,720.

In 2010, AT&T also announced a plans to partner with the U.S. General Services Administration to develop and manage a telepresence system for 11 regional headquarters offices, which would be powered by Cisco.

79 NESTLÉ FOODS VEVEY, SWITZERLAND

2010 U.S.-BOOKED AIR VOLUME: \$47 million

CONSOLIDATED U.S. AGENCY: BCD Travel

Nestlé in the United States increased 2010 U.S.-booked air volume from \$36.4 million in 2009. It acquired Waggin' Train dog snacks, with about \$200 million in sales, and Kraft's pizza business, which added 3,620 employees. Globally, the company reported sales of \$117 billion, of which \$36.5 billion was in the Americas.

U.S. travel is consolidated with BCD Travel. An online tool helps train or refresh travelers about travel and expense policy and process.

Nestlé's shared services organization, Nestlé Business Services North America, delivers travel and meeting services to six operating companies in North America. A major focus over the past year has been an initiative to centralize planning and end-to-end management of meetings with 50 or fewer attendees, which represent about 65 percent of the company's meetings. Working with technology provider StarCite, the company introduced an automated process for meeting sponsors to source and book hotels at prenegotiated rates and contracts. Sponsors also can build registration sites and contract audiovisual needs from the tool.

80 UBS ZURICH

2010 U.S.-BOOKED AIR VOLUME: \$46.9 million

CONSOLIDATED U.S. AGENCY: None, BCD Travel is primary

BTN estimates UBS booked air volume in 2010 was roughly \$46.9 million compared with \$55.9 million in 2009, representing the second consecutive year UBS experienced a drop in air volume. However, 2010's slight decrease was less impactful than the 40 percent drop in UBS business-related travel in 2009.

UBS promotes cutting business travel as a corporate social responsibility initiative, as the company continues to actively encourage videoconferencing for non-essential air travel. Moreover, UBS in 2010 invested in telepresence technology to enhance the quality of their employees' experience.

Meanwhile, buying into selected programs that included a wind power project in Turkey and a hydropower project in Brazil offset emissions from UBS air travel.

In 2009, a significant portion of UBS business travel cutbacks was due to the fact that the company employed fewer workers. However, UBS in 2010 only experienced a 1 percent year over year decrease in headcount, compared with 16 percent reduction in 2009.

Total UBS travel and entertainment increased in 2010 by 13 percent from the year before.

80 WPP
DUBLIN

2010 U.S.-BOOKED AIR VOLUME: \$46.9 million
CONSOLIDATED U.S. AGENCY: BCD Travel

BTN estimates that WPP grew its U.S.-booked air volume last year from \$41.8 million in 2009, even amid efforts to curtail travel through expanded remote conferencing.

By the end of last year, the media and communications conglomerate had deployed more than 75 high-definition videoconferencing units in 51 cities to be shared by all of its businesses, which include Grey Worldwide, JWT, Ogilvy & Mather and Young & Rubicam. Those video systems are linked to an additional 175 remote conferencing units owned by WPP's individual subsidiaries. The company last year introduced round-the-clock support services on weekdays to handle increased demand for the remote conferencing systems. While remote conferencing has helped curb travel for internal meetings, about half of the 11,000 hours logged last year "involved external links to clients," according to the company's most recent corporate responsibility report. "However, business air travel also increased during the year," the company noted. "In 2011 we will continue our communications plan to raise awareness and further increase use of the facilities."

To further its CSR efforts, the company encourages "low-carbon options such as hybrid vehicle rentals, energy-efficient hotels and airlines with modern fleets."

82 THOMSON REUTERS
NEW YORK

2010 U.S. BOOKED AIR VOLUME: \$46 million
COMPANYWIDE BOOKED AIR VOLUME: \$86 million
COMPANYWIDE T&E: \$240 million
PREFERRED VENDORS: British Airways, Delta, American; Hilton, Marriott Starwood; Hertz, National, Enterprise; GetThere; Infor
CONSOLIDATED U.S. AGENCY: None, American Express is primary

In 2010, going out to bid for new or better contracts was a main priority for media company Thomson Reuters. In order to consolidate its travel management program, the company issued a request for proposals for a single online booking tool. Thomson Reuters also conducted a global airline RFP, which was completed in early 2011.

Thomson Reuters in 2010 introduced official pre-trip requirements. For those trips that could be handled remotely, the company put in place telepresence technology.

The company this year altered its travel policy to include mixed classes of service on transatlantic flights. Thomson Reuters now allows business class only for overnight flights, with once-permissible daytime business-class bookings now in premium economy. Advanced booking requirements now also are in place.

83 INTERPUBLIC GROUP
NEW YORK

2010 U.S.-BOOKED AIR VOLUME: \$45.6 million
PREFERRED VENDORS: American, Delta, Continental, British Airways; Starwood, Leading Hotels of the World; Avis, National, Budget; Concur Cliqbook; Concur Expense
CONSOLIDATED U.S. AGENCY: American Express

Advertising and marketing services conglomerate Interpublic Group last year grew its U.S. booked air volume by \$9 million, according to *BTN* estimates. The group's annual report noted that travel and entertainment, office supplies and telecommunications expenses grew nearly 4 percent last year over 2009, building on a similar magnitude of growth from 2008 to 2009.

With nearly 42,000 employees, Interpublic Group has offices in more than 100 countries, and its global travel team has continued to consolidate its multinational program. The company last year expanded the rollout of multinational travel management services in Latin American markets, following the previous consolidation of travel and card processes in markets in Asia/Pacific, Europe, Middle East and Africa. American Express, along with HRG and Australia-based Bay Travel, provide travel services to Interpublic outside of the United States.

Interpublic Group continues to incorporate green practices into its travel program, with some business units encouraging remote conferencing, public transportation, hybrid vehicle usage and telecommuting where possible.

84 AMERICAN INTERNATIONAL GROUP
NEW YORK

2010 U.S.-BOOKED AIR VOLUME: \$45.3 million
U.S. T&E: \$70 million
PREFERRED VENDORS: American, Continental, Delta; Hilton, Marriott, Hyatt; National, Hertz; Concur Cliqbook; Concur Expense
CONSOLIDATED U.S. AGENCY: American Express

Insurance provider American International Group is undertaking a companywide effort to reduce operating expenses through greater efficiency, including its approach to global travel.

In 2010, AIG realigned its travel services team to take on a more global scope, identifying a new head of global travel, meetings and events based in London and establishing a formal business plan for 2011 with several key initiatives. Those included conducting a formal airline request for proposals, creating a global hotel program that includes the establishment of spending caps in all cities, implementing monthly reporting of expenditures and exception reporting to senior management, negotiating rail agreements where feasible, expanding the scope of its meeting planning efforts and enhancing its intranet site with new communications tools for travel arrangers.

AIG, which previously consolidated its travel management services in the United States with American Express, also conducted a review of its more than 80 travel management companies elsewhere in the world, with a goal of consolidating to no more than three globally. Its primary TMC outside of the United States is HRG, which currently is being implemented in more than 80 countries. AIG uses JTB as its TMC in Japan.

Another major goal for 2011 was the identification of areas requiring changes in travel policy. That effort included establishing a lowest logical airfare policy requiring the use of preferred carriers unless savings exceed 20 percent and basing the use of premium air service classes on flight mileage rather than duration. In addition, the company created a new requirement that senior management must approve exceptions to policy.

AIG this year also consolidated online booking tools from two to one in the United States, Concur's Cliqbook, and expanded its use globally. Online bookings accounted for 60 percent of U.S. transactions in 2010, with 70 percent of them requiring no agent intervention. AIG cardholders use cards issued by Citi. Employees use Concur globally to report expenses.

85 **BAYER** LEVERKUSEN, GERMANY

2010 U.S.-BOOKED AIR VOLUME: \$45 million
CONSOLIDATED U.S. AGENCY: BCD Travel

Pharmaceutical and agricultural product manufacturer Bayer increased its U.S.-booked air volume by 36 percent in 2010, according to *BTN* estimates. That put the company back above levels reported in 2008.

Bayer in the past few years has been consolidating travel policies and creating a single global policy guideline. In its 2010 annual report, it reported "uniform group directives" and central organization of procurement of all goods and services not relevant to production, which includes business travel and fleet management. The company also has run a climate protection program since 2007. Among its initiatives in that program are using telecommunications technology to reduce business travel and more environmentally friendly vehicles for company cars.

85 **JOHNSON CONTROLS** GLENDALE, WIS.

2010 U.S.-BOOKED AIR VOLUME: \$45 million
PREFERRED VENDORS: Concur Cliqbook, GetThere, Traveledo, CAXO; Infor
CONSOLIDATED U.S. AGENCY: American Express

Manufacturer Johnson Controls continues to encourage tele- and videoconferencing to reduce travel. It recently deployed nine Cisco TelePresence systems in the United States, South America, and

Europe, the Middle East and Africa "to help improve collaboration and unify the organization," according to a company sustainability report.

The company also recently implemented a "Smart Travel" program to further green its business travel, including advising employees to decline free rental car upgrades and surveying major lodging providers on their sustainable practices. Next year, plans to improve capture of hotel environmental data. The firm also has a new approval processes requiring vice presidents to approve travel.

Johnson Controls this year consolidated meetings with MaxVantage, a joint American Express and Maritz Travel offering. The company, which offers U.S. travelers a U.S. Bank Visa and a Citibank corporate card elsewhere, next year hopes to consolidate global card services.

87 **COVIDIEN** MANSFIELD, MASS.

2010 U.S.-BOOKED AIR VOLUME: \$44 million
COMPANYWIDE BOOKED AIR VOLUME: \$57 million
U.S. T&E: \$125 million
COMPANYWIDE T&E: \$140 million
PREFERRED VENDORS: American, Delta, Southwest; Marriott, Hilton; National, Enterprise; American Express Axiom; Infor, Concur
CONSOLIDATED U.S. AGENCY: American Express

Health care product supplier Covidien in 2010 increased its year-over-year U.S.-booked air volume by \$1 million, its U.S. travel and entertainment spending by \$2 million and its companywide T&E by \$4 million. The company this year aims to tighten policy compliance. After developing first-generation travel reports in 2010, Covidien this year has developed second-generation detailed reports by business unit, through which it will track compliance.

Covidien this year conducted a traveler and arranger survey and is mining that data to develop a detailed action plan for extended service capabilities. Additionally, it is working to improve data surrounding traveler security and tracking.

In 2010, Covidien extended its agreement with American Express, which serves as its consolidated agency within the United States, Canada and Mexico. Carlson Wagonlit Travel and Radius handle travelers outside of the United States. The company also in 2010 extended its agreements with its preferred car rental supplier and is working on a request for proposals for airlines and a global online booking tool.

Travelers in the United States and Canada use the American Express Axiom tool to book domestic and simple international flights, and the company reported 80 percent compliance to the tool in 2010. Covidien will begin implementing an online booking tool in Europe, the Middle East and Africa later this year.

Covidien travelers pay expenses on cards issued by J.P. Morgan in an individual bill and pay configuration. They report expenses through Infor in the United States and Concur in EMEA.

88 VIACOM
NEW YORK**2010 U.S.-BOOKED AIR VOLUME:** \$43.9 million**PREFERRED VENDORS:** American, Delta, Continental; Starwood, Four Seasons, Preferred Hotel Group, Morgans Hotel Group; Hertz, Budget, Midway; Concur Cliqbook, GetThere; IBM, Concur**CONSOLIDATED U.S. AGENCY:** None, Carlson Wagonlit Travel is primary

Viacom has not fully consolidated with a single travel management company—Carlson Wagonlit Travel services Viacom corporate, Viacom Media Networks and the BET network, while BCD Travel services Paramount Pictures—but the media conglomerate next year plans to further consolidation efforts. Outside of the United States, business essentially is split between CWT and BCD.

Viacom corporate and Viacom Media Networks use GetThere and IBM for online booking services and expense reporting, respectively, while BET and Paramount use Cliqbook and Concur.

The company in 2009 deployed a new pre-trip approval tool built in-house, which has increased visibility of noncompliance and simplified internal trip coding.

89 FIDELITY INVESTMENTS
BOSTON**2010 U.S.-BOOKED AIR VOLUME:** \$43.8 million**COMPANYWIDE BOOKED AIR VOLUME:** \$47 million**COMPANYWIDE T&E:** \$110 million**PREFERRED VENDORS:** Delta, American, British Airways; Marriott, Hilton, Starwood; Hertz, National**CONSOLIDATED GLOBAL AGENCY:** None, Orbitz for Business is primary

Mutual fund and financial services group Fidelity Investments' U.S.-booked air volume in 2010 jumped from \$30 million the year before. In 2010, Fidelity consolidated its hotel program and developed an internal business unit reporting system.

In 2010, Fidelity also introduced a traveler scorecard system. Fidelity does not have one consolidated agency, however, Orbitz for Business handles roughly 60 percent of all air bookings.

89 ROYAL PHILIPS ELECTRONICS
EINDHOVEN, THE NETHERLANDS**2010 U.S.-BOOKED AIR VOLUME:** \$43.8 million**COMPANYWIDE BOOKED AIR VOLUME:** \$143.7 million**U.S. T&E:** \$144.2 million**COMPANYWIDE T&E:** \$300.6 million**PREFERRED VENDORS:** Delta, United, Continental; InterContinental, Marriott, Hilton; Hertz, Avis, Enterprise; Cliqbook; Concur**CONSOLIDATED GLOBAL AGENCY:** American Express

Royal Philips Electronics in 2009 began guiding travelers to book only preferred hotels through preferred channels. After a year, Philips reported roughly 70 percent of bookings were with preferred hotels, of which 64 percent was completed through the travel management company or Cliqbook, its online booking tool.

Within Cliqbook, travelers are notified and prompted to select a reason code when they book hotels outside of policy or do not attach a hotel booking to an air reservation.

In 2010, Philips travelers for the first time were instructed to book nonrefundable airfares instead of full-fare tickets. After an analysis conducted with American Express, Philips determined that incurring change fees when necessary is cheaper than purchasing full-fare tickets for each booking.

91 AUTOMATIC DATA PROCESSING
ROSELAND, N.J.**2010 U.S.-BOOKED AIR VOLUME:** \$43 million**PREFERRED VENDORS:** United Continental, Delta, Air Canada; Starwood, InterContinental, Hilton, Marriott; Avis**CONSOLIDATED U.S. AGENCY:** American Express

With nearly \$9.9 billion in sales in fiscal 2011, up 11 percent from fiscal 2010, and 47,000 employees, business outsourcing solutions provider ADP serves about 550,000 clients. *BTN* estimates that its 2010 U.S. booked air volume was \$43 million.

ADP uses Avis as its primary U.S. car rental company but National as its primary rental car company in Canada.

ADP's Travel and Expense Management Solution automates booking through reimbursement for businesses with 50 to 999 employees. Concur provides its BizTrip online booking tool and Expense Expert expense management products, which integrate with ADP payroll.

91 CONOCOPHILLIPS
HOUSTON**2010 U.S.-BOOKED AIR VOLUME:** \$43 million**U.S. T&E:** \$85 million**PREFERRED VENDORS:** Continental, Delta, Lufthansa; Marriott, InterContinental, Hilton; National, Avis, Enterprise; GetThere, Amadeus E-Travel; SAP**CONSOLIDATED GLOBAL AGENCY:** American Express

After significant cuts in 2009, energy giant ConocoPhillips in 2010 boosted U.S.-booked air volume by 16 percent and U.S. travel and entertainment spending by 13 percent.

ConocoPhillips last year conducted a global airline bid, with both Continental and Delta remaining preferred vendors. The company this year is managing and monitoring the performance of its new agreements with those airlines.

About 30 percent of air travel in the United States was booked

through GetThere, similar to levels reported in 2009.

Besides serving as ConocoPhillips consolidated U.S. agency, American Express also is the company's primary travel management company outside of the United States. HRG and Capita Business also handle some of the company's travelers.

ConocoPhillips' travelers pay for expenses through individual billed, centrally paid cards issued by J.P. Morgan and report expenses through SAP globally.

ConocoPhillips is preparing to split by the second quarter of 2012 into two separate companies, one handling exploration and production and the other handling refining and marketing.

91 DUPONT WILMINGTON, DEL.

2010 U.S.-BOOKED AIR VOLUME: \$43 million

COMPANYWIDE BOOKED AIR VOLUME: \$86 million

U.S. T&E: \$101 million

COMPANYWIDE T&E: \$254 million

PREFERRED VENDORS: United, US Airways, Delta; Marriott, Hilton, InterContinental; National, Enterprise, Hertz; Concur Cliqbook, I:FAO Cytric; Concur Expense

CONSOLIDATED U.S. AGENCY: BCD Travel

After a major cutback in 2009, companywide travel and entertainment spending at DuPont last year rebounded by nearly 50 percent. The chemical company last year also raised the share of applicable U.S. domestic transactions booked online through its Concur Cliqbook self-booking tool to 80 percent from about 60 percent. DuPont uses Concur's expense reporting tools throughout the world, and uses I:FAO's Cytric platform for online booking outside of the United States. Company travelers use American Express corporate cards. Dupont last year also increased worldwide adoption of its meetings program.

This year, the company is further expanding its consolidated travel management program into Africa. BTI provides international travel management services, with BCD Travel serving North and South America and HRG serving the Asia/Pacific region and Europe, the Middle East and Africa.

94 BOSTON CONSULTING GROUP BOSTON

2010 U.S.-BOOKED AIR VOLUME: \$42.9 million

COMPANYWIDE BOOKED AIR VOLUME: \$143.7 million

U.S. T&E: \$61.5 million

COMPANYWIDE T&E: \$175.8 million

PREFERRED VENDORS: American Express Axiom, Amadeus e-Travel; Infor

CONSOLIDATED U.S. AGENCY: American Express

The Boston Consulting Group last year implemented online booking tools with the rollout of Axiom in the United States and Ama-

deus e-Travel in Europe. Efforts continue this year to deploy online technology within the Asia/Pacific region.

This year, the global management consulting firm's travel technology initiatives include adopting several American Express tools: the TrackPoint traveler tracking tool, the MobileXtend mobile travel tool and the AX Explore portal site, which provides travelers with global access to all BCG travel products, services and communications.

American Express also remains BCG's primary card provider.

95 VERIZON COMMUNICATIONS NEW YORK

2010 U.S.-BOOKED AIR VOLUME: \$42.2 million

COMPANYWIDE BOOKED AIR VOLUME: \$56.9 million

PREFERRED VENDORS: American, Delta, Continental; Hilton, Marriott, InterContinental; National, Enterprise, Avis; GetThere

CONSOLIDATED U.S. AGENCY: None; Orbitz for Business is primary

Belt-tightening initiatives last year resulted in Verizon moving such support functions as reporting and traveler customer service response to India and disallowing personal vehicle use for trips of 125 miles or more a day. For such trips, Verizon requires employees to rent cars as a more economical option. Verizon's U.S. air spend in 2010 declined about 5 percent, but increased 7 percent worldwide, both compared with 2009.

Travel program implementation throughout the Europe, Middle East and Africa region continued in 2010. The company expects to complete the effort this year and begin in Asia/Pacific countries. Business units Verizon Telecom and Verizon Business use American Express Travel and Carlson Wagonlit Travel, respectively, for travel management, as well as GetThere for online bookings globally. Verizon Wireless uses Orbitz for Business as an end-to-end solution, which handled about 48 percent of U.S.-booked air volume. In 2010, 92 percent of all Verizon bookings were made online and 97 percent required no agent assistance. Globally, the company uses Oracle PeopleSoft for expense reporting.

96 SCHLUMBERGER HOUSTON

2010 U.S.-BOOKED AIR VOLUME: \$42 million

COMPANYWIDE BOOKED AIR VOLUME: \$300 million

U.S. T&E: \$80 million

PREFERRED VENDORS: Continental, Air France, United; Hertz, National, Enterprise; GetThere; Concur

CONSOLIDATED U.S. AGENCY: BCD Travel

Oilfield services company Schlumberger grew its U.S. booked air volume by \$7 million last year from \$35 million in 2009, largely due to greater demand for travel, as the company kept its average ticket price and airline cost per mile flat over 2009. Closing

its merger with Smith International last year, Schlumberger subsequently has integrated the company's travel program.

Schlumberger has continued to drive online booking adoption, expanding the use of the GetThere booking tool in Canada, France, Germany, the Netherlands, the United Kingdom, Australia and Singapore. The company last year increased U.S. online booking adoption to 85 percent from 75 percent in 2009.

The company last year tightened its travel policy, mandating that employees book travel at least seven days in advance of the trip and book hotel stays only through preferred channels.

Schlumberger's consolidated U.S. agency is BCD Travel, while Carlson Wagonlit Travel, American Express and HRG are used in other countries. Schlumberger travelers carry the American Express corporate card for travel expenses, which are filed using the Concur expense system.

97 **CSC** FALLS CHURCH, VA.

2010 U.S.-BOOKED AIR VOLUME: \$41.8 million

PREFERRED VENDORS: American, Star Alliance, SkyTeam; Hilton, Marriott, InterContinental, Best Western, Extended Stay Hotels; Avis Budget; GetThere; Concur; Diners Club

CONSOLIDATED GLOBAL AGENCY: Carlson Wagonlit Travel

BTN estimates information technology firm CSC's U.S.-booked air volume grew modestly from the \$41 million estimated for 2009, following a decline from an estimated \$50 million in 2008.

Just under 40 percent of its \$16.1 billion in revenue for the 12 months ending Oct. 1, 2010, were derived from the North American public sector. In its private-sector businesses, CSC reduced headcount and targeted discretionary spending, including travel costs. The company installed high-definition videoconferencing globally, which has reduced some reliance on air services.

98 **DANAHER** WASHINGTON, D.C

2010 U.S.-BOOKED AIR VOLUME: \$41.6 million

CONSOLIDATED U.S. AGENCY: None

Diversified manufacturing and technology company Danaher for the first time joins the Corporate Travel 100 with an estimated \$41.6 million 2010 U.S.-booked air volume.

Across all business units, the company last year grew revenues to \$13.2 billion from \$11.2 billion in 2009. Selling, general and administrative expenses last year grew 15 percent year over year, comprising 28 percent of revenues. For the first six months of 2011, Danaher saw a 17 percent increase in selling, general and administrative expenses over the first half of 2010, according to its annual report.

The company's Hach subsidiary last year experimented with vir-

tual trade shows, and since then other Danaher operating companies have evaluated remote conferencing capabilities.

As of Dec. 31, 2010, Danaher had approximately 48,200 employees worldwide, about 21,400 of whom were based in the United States.

99 **CARGILL** WAYZATA, MINN.

2010 U.S.-BOOKED AIR VOLUME: \$41.5 million

COMPANYWIDE BOOKED AIR VOLUME: \$77 million

U.S. T&E: \$112.2 million

COMPANYWIDE T&E: \$198 million

PREFERRED VENDORS: Delta, United, American; InterContinental, Starwood, Hilton; National, Enterprise, Hertz; TRX ResX

CONSOLIDATED U.S. AGENCY: American Express

In 2010, food producer and marketer Cargill aimed to improve travel policy compliance and implemented pre-trip approvals where necessary. As a result, Cargill was able to drive its travel volume toward preferred suppliers, garnering a 20 percent to 30 percent reduction in global travel cost.

This year, Cargill is looking to improve the use of tools available to travelers to further drive savings through policy compliance and improve its data reporting.

In its fiscal 2011 ending May 31, Cargill reported \$404 million in earnings from continuing operations, a 7 percent decrease from \$435 million the year before. Earnings from continuing operations were \$2.69 billion, representing a 35 percent increase from \$1.99 billion in fiscal year 2010.

100 **BRISTOL-MYERS SQUIBB** NEWYORK

2010 U.S.-BOOKED AIR VOLUME: \$40.9 million

CONSOLIDATED GLOBAL AGENCY: American Express

BTN estimates that pharmaceutical manufacturer Bristol-Myers Squibb in 2010 increased its U.S. booked air volume by 22.5 percent year over year. BMS net sales in 2010 were \$19.5 billion, up 4 percent from 2009 levels, and the company in October completed an acquisition of biotechnology company ZymoGenetics for \$885 million. The company this year plans to increase total marketing, sales and administrative expenses in the mid-single-digit percentage range, though it is reducing advertising and promotion expenses.

BMS uses a technology known as Customer Connect to assist traveling sales representatives in Australia and in 2010 also was rolling out the technology in India. Both countries require sales reps to travel long distances to meet with physicians.

American Express now serves as Bristol-Myers Squibb's consolidated global agency, a recent switch from the company's use of Carlson Wagonlit Travel.

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