

1

IBM

ARMONK, N.Y.

2009 U.S. BOOKED AIR VOLUME: \$500 MILLION**PREFERRED VENDORS:** AMERICAN, DELTA; HERTZ, BOSTONCOACH, CAREY INTERNATIONAL; TRAVELPORT TRAVERSA; GALILEO**CONSOLIDATED U.S. AGENCY:** AMERICAN EXPRESS

BTM kept its estimate virtually flat for IBM's U.S. booked air spending this year from 2008, when it was estimated at \$505 million after reaching an estimated \$800 million in 2007. The company appears to have successfully implemented favorable airline deals leveraging individual and group travel in 2008 that carried over into 2009.

The company, meanwhile, reported a slight rise in employees in 2009 to 399,409 from 398,000 in 2008, even though its sales volume dropped to \$95.7 billion in 2009 from \$103.6 billion in 2008. While it has a strong reputation as a hardware manufacturer, its IT and business services units account for well over half of its sales. It serves clients in more than 170 countries.

Since serving as the launch customer and co-developer of Travelport's Traversa in 2007, IBM has further rolled out and helped refine the online booking system targeted at large companies. The number of IBM travelers using the system this year surpassed 250,000, with the tool reaching into 16 countries. IBM is in the midst of further rolling out Traversa, with targets to bring the tool to travelers in 70 countries by year-end.

IBM has preferred relationships with Hertz and two chauffeured transportation networks, but also contracts on a city-by-city basis for sedan, limousine and bus services. The company also continues to do a substantial amount of auto leasing.

IBM continues to seek hotel participation in providing e-folio data to foster paperless expense reporting for hotel charges by breaking them out by type of charge and delivering them electronically via a corporate payment system to prepopulate expense tools.

2

THE BOEING CO.

CHICAGO

2009 U.S. BOOKED AIR VOLUME: \$380.8 MILLION**PREFERRED VENDORS:** GETTHERE; CONCUR**CONSOLIDATED U.S. AGENCY:** BOEING CORPORATE TRAVEL DEPARTMENT

Boeing Travel Management, the in-house wholly owned travel agency subsidiary of aerospace manufacturer Boeing, on Jan. 1, 2010, converted to an ARC-accredited Corporate Travel Department. About 80 percent of the TMC's business was from Boeing, subsidiaries and joint ventures, and the remainder, from unaffiliated corporations and leisure travelers, was phased out during the past year. The TMC suspended leisure services in March 2009, then last November notified external clients of its move to become what now is by far the largest CTD.

The Boeing Corporate Travel Department handles travel services within the United States—where around 85 percent of the company's

travel spend is concentrated—and internationally, though BCD Travel and Hong Kong-based Swire Travel provide a small amount of travel management services in Asia.

The company's travel department last year made strides to contain travel costs through policy changes and heightened enforcement, helping to yield cost avoidance in excess of \$100 million.

U.S.-based travelers last year booked about 94 percent of air reservations using the GetThere tool, which is Boeing's preferred booking engine worldwide. Meanwhile, travelers file expenses using Concur, which Boeing has worked to refine as it seeks to increase end-user productivity and promote compliance with travel and miscellaneous expenses.

This year, the company has tightened approval processes for expense reports, while also putting tighter restrictions on lowest-fare selection.

Boeing last year upped corporate card enforcement and delinquency reporting, while shifting more responsibility and liability to cardholders. The company will suspend the accounts of cardholders with long stretches of inactivity. Citi provides Boeing with corporate card services.

Though Boeing does not have "preferred" vendors, U.S.-based travelers last year most often flew on American, Delta and Alaska, while Hilton, Marriott and InterContinental were used widely for lodging.

3

GENERAL ELECTRIC

FAIRFIELD, CONN.

2009 U.S. BOOKED AIR VOLUME: \$300 MILLION**PREFERRED VENDORS:** HERTZ; SABRE; GETTHERE**CONSOLIDATED GLOBAL AGENCY:** CARLSON WAGONLIT TRAVEL

General Electric further reduced headcount from 323,000 employees in 2008 to 304,000 in 2009, and it reduced its 2009 U.S. booked air spending \$20 million from 2008 after cutting more than \$30 million from the previous year. GE had more than 30 sites equipped with telepresence systems in 2009, and its online booking tool incorporates this option into the travel decision-making process.

In 2009, GE continued to advance the consolidated global travel management philosophy that it pioneered, which is focused on working 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 2009. 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. GE still uses a homegrown solution for its U.S. expense tool and Concur in Europe and Asia.

After American Express' acquisition of its GE Money corporate card unit in early 2008, GE switched its 80,000 U.S. cardholders to the Amex card at the end of that year. GE had more than 82,000 U.S. cardholders and more than 100,000 cardholders worldwide in 2009.

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

4

EXXON MOBIL

IRVING, TEXAS

2009 U.S. BOOKED AIR VOLUME: \$285.5 MILLION**PREFERRED VENDORS:** CONTINENTAL, AMERICAN, BRITISH AIRWAYS, AIR FRANCE; NATIONAL; ARIBA**CONSOLIDATED U.S. AGENCY:** NONE

BTN estimates Exxon Mobil reduced its U.S. booked air spending by more than \$10 million from \$296 million in 2008.

The world's largest integrated oil company saw its sales revenue slip to \$310.5 billion from \$477.4 billion in the previous year, following four years of record annual U.S. corporate sales. The company uses American Express to serve headquarters travel, and Carlson Wagonlit Travel is its primary U.S. travel management company elsewhere. In Europe, the Middle East and Africa, the company uses the services of BCD Travel.

American Express remains the single global corporate card provider. Exxon Mobil uses Amadeus as its primary global distribution system provider in Europe and Sabre as its primary GDS throughout the Americas.

5

LOCKHEED MARTIN

BETHESDA, MD.

2009 U.S. BOOKED AIR VOLUME: \$235.3 MILLION**COMPANYWIDE BOOKED AIR VOLUME:** \$244.4 MILLION**COMPANYWIDE T&E:** \$648 MILLION**PREFERRED VENDORS:** UNITED, AMERICAN, DELTA, CONTINENTAL; MARRIOTT, HILTON, INTERCONTINENTAL; AVIS; TRAVELOCITY BUSINESS; IBM**CONSOLIDATED GLOBAL AGENCY:** TRAVELOCITY BUSINESS

Defense conglomerate Lockheed Martin in 2009 completed construction of a new airline program, reduced the number of properties with which it negotiated corporate rates, extended existing car rental agreements to lock in favorable rates while still in a buyer's market and negotiated its first approved restaurant program in several U.S. cities.

The moves helped shave about \$40 million off Lockheed Martin's 2008 U.S. booked air volume, as did a flurry of internal changes. Lockheed Martin encouraged remote conferencing use and preferred vendor choice to limit noncompliance and travel.

For several years, Lockheed Martin has operated a centralized meetings management structure, and this year plans to rewrite policy to further consolidate meetings. Other policy enhancements include a section demarcating reimbursable a la carte airline fees.

Lockheed Martin's travel program is the world's largest to consolidate U.S. services with an Internet travel management company: Travelocity Business, with which Lockheed is working to add the capability to book corporate housing. About 92 percent of applicable 2009 U.S.-booked trips were booked through T-Biz, as were about 82 percent internationally. Lockheed travelers carry a U.S. Bank Visa card for T&E expenses, and IBM provides online expense reporting management capabilities.

6

DELOITTE

NEW YORK

2009 U.S. BOOKED AIR VOLUME: \$192 MILLION**U.S. T&E:** \$622 MILLION**PREFERRED VENDORS:** DELTA, AMERICAN, CONTINENTAL; MARRIOTT, STARWOOD, HILTON; AVIS, BUDGET, HERTZ; ORBITZ FOR BUSINESS**CONSOLIDATED U.S. AGENCY:** BCD TRAVEL

Big Four accounting and consulting firm Deloitte in 2009 implemented a pre-trip approval process for discretionary travel.

As it did so, U.S. booked air volume decreased almost 30 percent year over year, and U.S. travel and entertainment spending was down more than 36 percent.

The company also conducted an airline request for proposals in 2009, resulting in the elimination of one major carrier from its program, and altered its policy to address usage of wireless Internet aboard aircraft.

Deloitte integrated its travel program in India with its U.S. program. The company replaced its booking tool, supplied by Travelport, with Orbitz for Business in 2009. U.S. travelers use Diners Club MasterCards, and travelers report expenses through an internal tool.

7

BANK OF AMERICA

CHARLOTTE, N.C.

2009 U.S. BOOKED AIR VOLUME: \$190 MILLION**PREFERRED VENDORS:** US AIRWAYS, AMERICAN, BRITISH AIRWAYS, CONTINENTAL, DELTA; HILTON, INTERCONTINENTAL, RITZ-CARLTON; AVIS, HERTZ, ENTERPRISE, NATIONAL; GETTHERE; CONCUR**CONSOLIDATED U.S. AGENCY:** AMERICAN EXPRESS

BTN estimates that Bank of America's U.S. booked air volume increased by almost 60 percent from 2008 as it integrated Merrill Lynch's travel program, following a late 2008 acquisition.

Building a global travel program incorporating both companies' programs, it reduced the number of preferred global airlines and cut its preferred hotels by 35 percent. The firm also built a sustainable future model by combining transient and group volume in its hotel program.

Bank of America in 2009 drove more volume to its preferred suppliers by mandating their use with very narrow exception parameters.

The bank owns an 18-story Ritz-Carlton hotel, which opened near Bank of America's Charlotte headquarters last year and estimated that about half of its rooms will be used for visiting employees and guests.

American Express serves as the firm's consolidated U.S. agency. It also handles international travel needs, alongside HRG.

Bank of America is an issuer of corporate T&E cards on the Visa platform. About 73 percent of U.S. air bookings in 2009 were made through the GetThere online tool.

CONTINUED ON PAGE 20

CONTINUED FROM PAGE 10

8

ACCENTURE

DUBLIN, IRELAND

2009 U.S. BOOKED AIR VOLUME: \$185 MILLION**COMPANYWIDE BOOKED AIR VOLUME:** \$436 MILLION**U.S. T&E:** \$493 MILLION**COMPANYWIDE T&E:** \$1.1 BILLION**PREFERRED VENDORS:** UNITED, AMERICAN, DELTA, LUFTHANSA, BRITISH AIRWAYS; MARRIOTT, STARWOOD, HILTON; HERTZ, AVIS; CWT HORIZON, GETTHERE**CONSOLIDATED U.S. AGENCY:** CARLSON WAGONLIT TRAVEL

Accenture, one of the world's largest consulting firms and providers of information technology and outsourcing services, ended the year on a note of consolidation, bringing its travel program under a single agency and primary global distribution system and online booking tool.

Accenture in 2009 went through an extensive request-for-proposals process for a global program and selected Carlson Wagonlit Travel and GetThere/Sabre, launching the new program in December. The new model is active in 40 markets. Previously, the firm had worked with two agencies—American Express and CWT, the latter of which already had served as its consolidated U.S. agency—seven booking tools and four GDSs in a country-specific model.

Accenture expects the new model will save 30 percent off its agency and technology costs. The firm's online booking compliance already was high, with 90 percent of 2009 U.S. air bookings made through the tool. Most Accenture travel now is supported through shared service centers in Downers Grove, Ill., for the Americas; Rzeszów, Poland, for Europe, the Middle East and Africa; and Singapore for the Asia/Pacific region.

At the same time, Accenture tightened and simplified policy language for clarity and easier application and understanding.

Accenture's 2009 U.S. booked air volume was down nearly 23 percent compared with 2008 levels. U.S. travel spending was down 24 percent, and overall T&E was down by almost 27 percent.

After outsourcing its meetings in the United States in 2008, Accenture this year is doing so in Belgium, France, Luxembourg, the Netherlands and Spain. The firm is expanding its corporate housing model globally.

American Express issues corporate T&E cards for Accenture, and travelers globally report their expenses through a company-built system.

9

WORLD BANK

WASHINGTON, D.C.

2009 U.S. BOOKED AIR VOLUME: \$174 MILLION**PREFERRED VENDORS:** DINERS CLUB; AMADEUS E-TRAVEL; SAP**CONSOLIDATED U.S. AGENCY:** AMERICAN EXPRESS

The World Bank spent \$174 million in U.S. booked air volume, after reporting that it spent \$178.5 million in 2008 as it reduced its operating income from \$2.271 billion in 2008 to \$572 million in 2009. About 90 percent of its air spending is for international travel.

10

BP

LONDON

2009 U.S. BOOKED AIR VOLUME: \$160 MILLION**PREFERRED VENDORS:** BRITISH AIRWAYS, AMERICAN, CONTINENTAL, DELTA, LUFTHANSA, SOUTHWEST, SINGAPORE; MARRIOTT, HILTON, HYATT, INTERCONTINENTAL; HERTZ; SABRE; GETTHERE, KDS**CONSOLIDATED GLOBAL AGENCY:** CARLSON WAGONLIT TRAVEL

BTN estimates BP cut another \$65 million from its U.S. booked air spending in 2009 from the \$225 million it spent in 2008, after slashing the \$365 million it spent in 2007, mainly as part of a program of improving operating performance and corporate simplification.

BP implemented GetThere in the United States, Canada, Hong Kong and Singapore in 2009, with more countries to come online in 2010. BP restructured its travel organization and now features sourcing, program management, fleet and meetings management departments.

The company revised its global travel policy with an emphasis on lowest logical fares. It deployed new reporting to business unit leaders.

BP continued to use American Express as its primary corporate card in the United States and Sabre as its primary domestic global distribution system, using Amadeus internationally.

11

CITIGROUP

NEW YORK

2009 U.S. BOOKED AIR VOLUME: \$150 MILLION**COMPANYWIDE T&E:** \$1 BILLION**PREFERRED VENDORS:** AMERICAN, BRITISH AIRWAYS, DELTA, VIRGIN ATLANTIC; FOUR SEASONS, RITZ-CARLTON, MARRIOTT, HILTON; AVIS, HERTZ; CONCUR**CONSOLIDATED U.S. AGENCY:** AMERICAN EXPRESS

BTN estimates Citi 2009 U.S. booked airline spend at \$150 million and companywide T&E at \$1 billion.

In 2009, Citi, which has operations in approximately 100 countries,

installed a new travel team to overhaul and upgrade the global travel program and begin the process of consolidating data through a single third-party company. This year, Citi is pursuing travel technology, corporate card and ground transportation requests for proposals, strict enforcement of preferred vendor compliance and the implementation of lowest logical hotel and airfare policies.

In 2009, the Citi global travel department commenced negotiations in every city with more than 100 room nights annually. The new hotel program was launched in May and successfully lowered rates and increased the number of cities with preferred hotels. Citi completed a global airline request-for-proposals process, and new airline contracts will be effective this fall. Citi has increased online booking adoption levels to 75 percent among its 90,000 travelers.

BTN estimates that Citi travel savings will exceed \$50 million, with \$15 million to \$20 million of that from its hotel program. Citigroup uses a third party to aggregate data and Concur as its primary global expense reporting system. Last year, Citigroup used its own Diners Club card, which it sold at the end of 2009 to BMO, as its global payment system.

11

MICROSOFT

REDMOND, WASH.

2009 U.S. BOOKED AIR VOLUME: \$150 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$300 MILLION

U.S. T&E: \$400 MILLION

COMPANYWIDE T&E: \$700 MILLION

PREFERRED VENDORS: DELTA, ALASKA, AMERICAN, BRITISH AIRWAYS, LUFTHANSA; MARRIOTT, STARWOOD, HILTON; AVIS; ORBITZ FOR BUSINESS

CONSOLIDATED GLOBAL AGENCY: AMERICAN EXPRESS

Tech giant Microsoft last year completed a request-for-proposals process for global travel management services, deciding eventually to remain with American Express, which also serves as its preferred corporate card vendor. Microsoft also bid its global car rental account and stuck with Avis as its only preferred provider, signing a three-year deal.

This year, the company is in the process of rolling out self-booking services in Asia. Microsoft uses Orbitz for Business as its U.S. online booking tool, and has a 93 percent U.S. air compliance rate. It hosts telepresence suites at its offices in Seattle, Singapore and Reading, U.K.

Microsoft, which operates on a July-to-June fiscal year, slashed total travel spending by \$80 million from the previous fiscal year.

13

ORACLE

REDWOOD SHORES, CALIF.

2009 U.S. BOOKED AIR VOLUME: \$145 MILLION

PREFERRED VENDORS: UNITED, DELTA, AMERICAN, LUFTHANSA; MARRIOTT, HILTON, STARWOOD; HERTZ, AVIS; GETTHERE; IEXPENSE

CONSOLIDATED GLOBAL AGENCY: CARLSON WAGONLIT TRAVEL

Enterprise technology system developer and follow-the-sun travel

management configuration trailblazer Oracle in January 2010 finalized the acquisition of technology firm Sun Microsystems, itself a former Corporate Travel 100 member. Managing the impacts of that transaction will mark much of Oracle's 2010 travel management strategy.

Last year, Oracle consolidated more Asia/Pacific countries, including India, into the regional call center that serves that area. Additionally, the company continued the global rollout of its GetThere online booking tool, achieving a 94 percent adoption rate on applicable air transactions in the United States and 79 percent elsewhere. This year, the company plans to introduce the booking tool in Australia.

Oracle negotiated two-year deals with several large hotel chains last year and is pursuing more in 2010. The company also is in the midst of negotiating airline contracts and seeking to improve service. Oracle uses its own IExpense product for online travel expense management.

13

RAYTHEON

WALTHAM, MASS.

2009 U.S. BOOKED AIR VOLUME: \$145 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$155 MILLION

U.S. T&E: \$210 MILLION

COMPANYWIDE T&E: \$225 MILLION

PREFERRED VENDORS: AMERICAN, DELTA, US AIRWAYS; HILTON, MARRIOTT, STARWOOD; NATIONAL, AVIS, ENTERPRISE; CLIQBOOK

CONSOLIDATED U.S. AGENCY: BCD TRAVEL

Defense and government contractor Raytheon saw its U.S. booked air volume in 2009 decline only slightly to \$145 million from \$150 million in 2008. The company last year increased adoption of its Cliqbook online booking tool from around 80 percent in 2008 to 85 percent last year.

Raytheon's travelers use a Citibank MasterCard for T&E and file expenses using an internally developed expense-reporting system.

The company's consolidated U.S. travel management company is BCD Travel, which also services the company elsewhere.

15

NORTHROP GRUMMAN

LOS ANGELES

2009 U.S. BOOKED AIR VOLUME: \$137 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$137 MILLION

U.S. T&E: \$349 MILLION

COMPANYWIDE T&E: \$351 MILLION

PREFERRED VENDORS: UNITED, DELTA, AMERICAN; MARRIOTT, HILTON, STARWOOD; BUDGET, AVIS; GETTHERE; CONCUR

CONSOLIDATED U.S. AGENCY: AMERICAN EXPRESS

Defense contractor and shipbuilder Northrop Grumman last year implemented a new corporate card program, switching to JPMorgan as its preferred vendor, and consolidated multiple policies into a single per-diem-based reimbursement structure.

Northrop Grumman, which shed \$24 million from its 2008 U.S. booked air booking volume, last year also mandated its travelers use

nonrefundable tickets for U.S. domestic travel. Domestic adoption of its GetThere self-booking tool increased to 91 percent in 2009.

Northrop Grumman last year harmonized travel policies and processes throughout the organization.

16 MORGAN STANLEY NEW YORK

2009 U.S. BOOKED AIR VOLUME: \$130 MILLION

PREFERRED VENDORS: UNITED, AMERICAN, CONTINENTAL, DELTA; HERTZ, NATIONAL, ENTERPRISE; CLIQBOOK

CONSOLIDATED U.S. AGENCY: CARLSON WAGONLIT TRAVEL

Even with the 2009 completion of the acquisition of Smith Barney from Citigroup, *BTN* estimates financial services firm Morgan Stanley cut U.S. booked air spending by \$58 million, even more than the \$35 million it cut in 2008 from its 2007 air expenditure.

Sales for the combined entity fell by more than half from \$62.2 billion in 2008 to \$30 billion in 2009, but the company managed to repay its TARP funds within six months with a 21 percent return for U.S. taxpayers.

In 2009, the company continued to build on its success in managing its meetings spending, following the deployment in 2007 of an initiative that produced meetings data, contract standards, preferred vendors and savings. It also increased its use of the Cliqbook online booking tool and furthered use of internally developed pre-trip approval tools. The firm uses American Express as its single corporate card provider.

17 SIEMENS MUNICH, GERMANY

2009 U.S. BOOKED AIR VOLUME: \$126 MILLION

PREFERRED VENDORS: UNITED, CONTINENTAL, LUFTHANSA, AMERICAN, SOUTHWEST, DELTA; HILTON, LA QUINTA, INTERCONTINENTAL; NATIONAL, ENTERPRISE; REARDEN; EZ-X
CONSOLIDATED U.S. AGENCY: BCD TRAVEL

BTN estimates that Siemens' U.S. booked air volume dropped to \$126 million in 2009 from \$190 million in 2008.

During 2009, the engineering conglomerate's travel and mobility services team increased preferred channel compliance and online booking adoption and touchless fulfillment rates from the low- to mid-70 percent range. Siemens also underwent significant technology changes in 2009 by beginning the transition from its preferred U.S. self-booking tool, Amadeus E-Travel, to the Rearden Commerce Personal Assistant.

Siemens also launched an end-to-end meetings management platform that integrates its meetings payment system with automated planning and air and hotel booking processes through the StarCite and American Express Meetings360 platform. In 2010, Siemens completed the rollout of its meetings and events program.

BCD Travel serves as Siemens' consolidated U.S. agency. The travel management company also handles some services abroad, as does American Express, Carlson Wagonlit Travel and FCm Travel Solutions.

The Siemens travel team is undergoing a strategic review of its preferred air strategy and is limiting business class travel. It also is focusing on renegotiating rates for hotel stays of 30 days or more.

At the end of 2009, the travel team, which had been operating in a shared services procurement environment, moved into the supply chain management organization. Also late in 2009, Siemens employed electronic bidding for a global car rental tender.

In 2010, the Siemens Canadian travel program, which uses Carlson Wagonlit Travel, will begin using a key performance indicator scorecard.

18 PRICEWATERHOUSECOOPERS NEW YORK

2009 U.S. BOOKED AIR VOLUME: \$114 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$212 MILLION

U.S. T&E: \$382 MILLION

COMPANYWIDE T&E: \$697 MILLION

PREFERRED VENDORS: DELTA, UNITED, AMERICAN; MARRIOTT, STARWOOD, HILTON; HERTZ, BUDGET, ENTERPRISE; GETTHERE; SAP

CONSOLIDATED U.S. AGENCY: AMERICAN EXPRESS

Big Four auditing, accounting and consulting firm PricewaterhouseCoopers continued to reduce its travel spending in 2009, cutting U.S. booked air volume and total companywide travel expenses by more than 35 percent each. Contributing to this effort was a comprehensive 2009 travel policy assessment that led to additional restrictions and stronger language, a process that has continued in 2010.

American Express serves as PwC's preferred corporate card vendor and consolidated U.S. travel management company and holds a share its international business, as does HRG Worldwide and BCD Travel.

PwC last year increased its adoption of the GetThere booking tool for U.S. point-of-sale air transactions to about 91 percent.

18 WELLS FARGO SAN FRANCISCO

2009 U.S. BOOKED AIR VOLUME: \$114 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$140 MILLION

U.S. T&E: \$450 MILLION

COMPANYWIDE T&E: \$500 MILLION

PREFERRED VENDORS: US AIRWAYS, DELTA, UNITED; MARRIOTT, STARWOOD; HERTZ, ENTERPRISE, NATIONAL; CLIQBOOK; CONCUR

CONSOLIDATED U.S. AGENCY: HRG

Following a busy 2008 in which Wells Fargo purchased bank holding company Wachovia, 2009 was a year of integration for the banking giant's travel department, which saw its new holdings bring U.S. booked air volume to \$114 million. Joining together the Wells Fargo and Wachovia travel programs, the travel team last year renegotiated all vendor contracts, harmonized travel policies and sourced a single travel management company for services in the United States and United Kingdom, as well as Hong Kong, Singapore, Japan and Russia.

Last year, the combined company selected HRG as its consolidated U.S. agency, and as of Sept. 1, 2009, all of Wells Fargo was consolidated. HRG also serves as the primary agency elsewhere. Previously, Wells Fargo had managed travel for its different divisions separately. The bulk of the company's air spend is concentrated in the United States.

Wells Fargo this year launched a self-service tool for small meetings, while it also moved to increase online booking adoption. About 90 percent of the company's eligible U.S. air transactions were made through Concur's Cliqbook booking tool in 2009, and the company this year moved previously non-eligible transaction types online.

Wells Fargo is integrating Cliqbook with the Concur expense platform, working on a car service request for proposals and eyeing airport parking and dining for savings opportunities.

20 JOHNSON & JOHNSON NEW BRUNSWICK, N.J.

2009 U.S. BOOKED AIR VOLUME: \$112.8 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$259.3 MILLION

U.S. T&E: \$357.8 MILLION

COMPANYWIDE T&E: \$530.3 MILLION

PREFERRED VENDORS: CONTINENTAL, DELTA, AMERICAN; MARRIOTT, HILTON, STARWOOD; AVIS, NATIONAL, HERTZ; GETTHERE; IBM

CONSOLIDATED GLOBAL AGENCY: AMERICAN EXPRESS

Johnson & Johnson last year not only reduced its U.S. booked air volume by more than \$90 million from 2008 levels, but also completed a worldwide agency consolidation effort, bringing most of its 250 operating companies in more than 80 countries under an American Express contract. J&J has established a central global repository of all traveler and trip information, and bid for its first global car rental contract, which would supplant regional deals.

Meanwhile, the company has found success in negotiating and even removing ancillary fees in several travel supplier categories, including hotel high-speed Internet access charges. J&J in recent years has moved to the forefront in the industry's efforts to address proper loading of negotiated hotel rates in global distribution systems and has established service-level agreements to dissuade and penalize improper loading.

It pushed usage of StarCite's meetings technology platform and worked to ease attrition and cancellation contract clauses. J&J also rolled out a mobile application for U.S. traveler itinerary management.

21 CHEVRON SAN RAMON, CALIF.

2009 U.S. BOOKED AIR VOLUME: \$108.1 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$265 MILLION

PREFERRED VENDORS: CONTINENTAL, UNITED, LUFTHANSA; MARRIOTT, HILTON, HYATT; AVIS, BUDGET; CLIQBOOK; IBM

CONSOLIDATED U.S. AGENCY: CARLSON WAGONLIT TRAVEL

Chevron trimmed its U.S. booked air volume by nearly one-third in 2009

as the oil giant worked closely with suppliers for optimal travel management in a down economy. The company, one of the largest U.S. oil companies, last year increased the reach of its Cliqbook online booking tool, rolling it out in Canada and the United Kingdom. About 68 percent of U.S. air travel flowed through Cliqbook in 2009. Additionally, Chevron last year focused on sourcing for its meetings program.

Carlson Wagonlit Travel serves as Chevron's consolidated U.S. agency and handles a portion of its travel elsewhere, along with Otrar Travel in Kazakhstan and World Travelers of America. JPMorgan issues corporate cards for Chevron travelers, who use IBM's expense management tool.

22 JPMORGAN CHASE NEW YORK

2009 U.S. BOOKED AIR VOLUME: \$103.9 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$195.6 MILLION

COMPANYWIDE T&E: \$450 MILLION

PREFERRED VENDORS: AMERICAN, CONTINENTAL, UNITED, BRITISH AIRWAYS; MARRIOTT, HILTON, STARWOOD; AVIS, ENTERPRISE, HERTZ; GETTHERE, KDS

CONSOLIDATED GLOBAL AGENCY: CARLSON WAGONLIT TRAVEL

Financial services giant JPMorgan Chase in recent years has emphasized online booking in its travel program, and 2009 saw a continuation of that effort. The company increased adoption of its GetThere self-booking tool for applicable U.S. transactions to 81 percent. Overseas, JPMorgan Chase expanded the reach of the KDS self-booking tool to more countries in Europe, the Middle East, Africa and Asia. In 2010, additional rollouts will take place in Asia and Europe.

JPMorgan Chase, which cut about one-quarter off its 2008 U.S. booked air volume, in 2009 limited the number of properties in its preferred hotel program. The company continued to focus on reducing costs last year by sending e-mail notifications before and after ticketing, improving adherence to corporate travel policy.

JPMorgan Chase this year plans to launch a request for proposals for global distribution system service, and explore technological solutions to further lower costs and increase productivity.

23 MCKINSEY & CO. NEW YORK

2009 U.S. BOOKED AIR VOLUME: \$100 MILLION

PREFERRED VENDORS: CONTINENTAL, DELTA, UNITED; STARWOOD; HERTZ, AVIS; AXIOM

CONSOLIDATED U.S. AGENCY: AMERICAN EXPRESS

McKinsey made an even deeper cut in its U.S. booked air travel spending last year than it did the previous year, slashing that spending by 43 percent from \$176 million in 2008 after reducing U.S. booked air travel spending by \$60 million from the \$236 million it spent in 2007.

Meanwhile, the consulting company kept its number of employees relatively flat at 16,500 in 2009 from 17,000 in 2008. Sales revenue was

\$6 billion last year. McKinsey has about 90 offices in more than 50 countries. Outside the United States, McKinsey uses several travel management companies, including Carlson Wagonlit Travel.

Last year, the consulting firm significantly boosted the use of its Axiom travel procurement tool and restricted the class of airline service.

23 PFIZER

NEW YORK

2009 U.S. BOOKED AIR VOLUME: \$100 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$234 MILLION

U.S. T&E: \$155 MILLION

COMPANYWIDE T&E: \$737 MILLION

PREFERRED VENDORS: DELTA, AMERICAN, CONTINENTAL, BRITISH AIRWAYS; MARRIOTT, HILTON, STARWOOD; AVIS, BUDGET, HERTZ; GETTHERE, AMADEUS E-TRAVEL; CONCUR

CONSOLIDATED U.S. AGENCY: BCD TRAVEL

Pfizer in October 2009 finalized a \$68 billion acquisition of pharmaceutical rival and former Corporate Travel 100 member Wyeth, and its listed travel volumes incorporate both companies' spending.

The Wyeth integration was a key aspect of Pfizer's 2009 travel strategy, along with the issuance of a new travel policy that mandated the use of Pfizer's GetThere online booking tool for domestic U.S. travel. The company uses Amadeus'E-Travel booking tool outside North America.

Pfizer also continued to consolidate international travel agency services and establish service centers with the intention of building a follow-the-sun service model in the next three years. The company continues to hold a global agency contract with BTI—formerly a joint venture between BCD Travel and HRG Worldwide that continues to service clients that predate its breakup—for the bulk of Pfizer's international business. American Express also holds a piece.

Pfizer is considering limiting business-class travel to flights of at least six hours, up from five, and is evaluating first-class eligibility. Pfizer plans to further encourage telepresence as an alternative to travel.

25 HEWLETT-PACKARD

PALO ALTO, CALIF.

2009 U.S. BOOKED AIR VOLUME: \$94 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$201 MILLION

U.S. T&E: \$320 MILLION

COMPANYWIDE T&E: \$800 MILLION

PREFERRED VENDORS: UNITED, AMERICAN, CONTINENTAL; MARRIOTT, HILTON; HERTZ, AVIS

CONSOLIDATED GLOBAL AGENCY: CARLSON WAGONLIT TRAVEL

Following the acquisition of former Corporate Travel 100 mainstay EDS in 2008, Hewlett-Packard in 2009 finalized the integration of the EDS travel program, which added about 140,000 employees.

With the integration, HP enacted savings through consolidation, strategic sourcing, new travel policies and an emphasis in reducing non-

customer-facing travel. Along with increased use of HP's Halo Telepresence Studios, the company's U.S. booked air was down by 46 percent and by almost 52 percent globally, compared with 2008.

New policies require internal travel to be booked at least seven days in advance and completely prohibit same-day travel. HP also tightened its restrictions on premium class travel, now requiring all exceptions to be approved by a senior executive. HP's hotel policy requires that only approved negotiated properties are utilized.

HP has consolidated its travel under Carlson Wagonlit Travel globally and this year finalized consolidating its reservation operations to two global travel centers, in Vancouver, Canada, and Rzeszów, Poland. Those two travel centers are outfitted with 100 percent dedicated travel consultants and VOIP solutions to give HP travelers 24/7 support. Single-country fulfillment is available to those few countries with specific language or local content requirements. Travelers report expenses through an internal tool, and HP this year fully implemented an updated version.

26 ERNST & YOUNG

LONDON

2009 U.S. BOOKED AIR VOLUME: \$93 MILLION

PREFERRED VENDORS: DELTA, AMERICAN, CONTINENTAL; MARRIOTT, STARWOOD, HILTON; AVIS; GETTHERE

CONSOLIDATED U.S. AGENCY: AMERICAN EXPRESS

Big Four auditor and professional services firm Ernst & Young cut its U.S. booked air volume by more than one-third in 2009 and boosted travel program compliance through new mandates. It now requires travelers to book through the firm's consolidated U.S. agency, American Express, and stay at preferred hotels or face potential nonreimbursement. Savings in 2009 also came from renegotiating rates with travel vendors.

Travelers outside of the United States book travel through Carlson Wagonlit Travel, BCD Travel, HRG and a variety of smaller agencies in addition to American Express, which also issues corporate cards for Ernst & Young. Travelers globally report their expenses through an internal system. This year, Ernst & Young is focusing on customer satisfaction in its travel program as well as driving cost savings and avoidance. It also issued an overarching global travel policy.

27 WALT DISNEY CO.

BURBANK, CALIF.

2009 U.S. BOOKED AIR VOLUME: \$92.8 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$108.8 MILLION

PREFERRED VENDORS: STARWOOD, HILTON, MARRIOTT; NATIONAL, ENTERPRISE, HERTZ; GETTHERE; SAP

CONSOLIDATED U.S. AGENCY: HRG

With its U.S. booked air volume falling to \$92.8 million in 2009 from \$129 million in 2008, Disney's travel department paid particular attention last year to maintaining preferred supplier marketshare.

Disney in the past year sought to reduce travel spending by asking

business units to reconsider travel entitlements, such as premium class travel, or eliminate unnecessary trips by 30 percent. Four business units temporarily downgraded entitlements last year. Disney also consolidated international travel management data to further monitor compliance with preferred vendors.

The company this year plans to bolster use of its online booking system, aided in part by a soft senior management mandate, and is creating a sub-site for non-employees like contractors, freelancers and consultants.

HRG provides Disney with travel agency services in the United States, United Kingdom and most of Asia, while BCD is used in Europe, the Middle East and Africa, as well as Latin America and Japan. Travelers use the JP Morgan Chase Visa card and file expenses using SAP.

28 PEPSICO

PURCHASE, N.Y.

2009 U.S. BOOKED AIR VOLUME: \$84 MILLION

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

CONSOLIDATED U.S. AGENCY: BCD TRAVEL

PepsiCo's expenses stayed at a controlled reduced level for 2009 in

response to the general economy, similar to other corporations, and the company started a policy-revamping process.

The beverage and snack conglomerate held adoption for its Cliqbook online booking tool above 80 percent and focused on getting even tighter control on T&E spending through agency reporting, online booking and expense management tools. Travelers in the United States report expenses through Concur, with increased rollout to SAP T&E expense management.

HRG handles travelers outside of the United States for 24 countries in Europe, the Middle East and Africa and Asia/Pacific, with BCD Travel managing Canada and select Latin and South American countries.

American Express is PepsiCo's preferred payment system provider.

29 NOVARTIS

BASEL, SWITZERLAND

2009 U.S. BOOKED AIR VOLUME: \$83.8 MILLION

PREFERRED VENDORS: CONTINENTAL, DELTA, AMERICAN, LUFTHANSA, SWISS; MARRIOTT, HILTON, STARWOOD; HERTZ, NATIONAL; CWT HORIZON, KDS; CONCUR, SAP

CONSOLIDATED U.S. AGENCY: NONE, CARLSON WAGONLIT IS PRIMARY



HOW SUITE OF YOU

Making people feel at home is at the heart of what we do. But we couldn't do it without you. And when your team rates us "Highest in Guest Satisfaction Among Extended Stay Hotel Chains," we have you to thank. HOMEWOODSUITES.COM



YUMMY HOT BREAKFAST



ROOMY SUITES



TASTY DINNER AND DRINKS (M-Th)

Homewood Suites received the highest numerical score among extended stay hotels in the proprietary J.D. Power and Associates 2010 North America Hotel Guest Satisfaction Index StudySM. Study based on responses from 53,174 guests measuring 7 extended stay hotels and measures opinions of guests who stayed in a hotel May 2009-June 2010. Proprietary study results are based on experiences and perceptions of consumers surveyed June 2009-June 2010. Your experiences may vary. Visit jdpower.com. Evening dinner and drinks available Monday-Thursday. Subject to state and local laws. Must be of legal drinking age. ©2010 Hilton Worldwide.



Pharmaceutical firm Novartis in 2009 did not have a consolidated travel agency, but that has since changed after the firm last year selected HRG Worldwide as its global travel management company.

This year, Novartis is converting to HRG throughout the world. Carlson Wagonlit Travel previously served as Novartis' primary agency in the United States and Switzerland, handling about 92 percent of its domestic business and a piece of its international travel, along with HRG and American Express.

The switch also will affect Novartis' self-booking strategy: The company in 2009 used Carlson Wagonlit Travel's Horizon online booking tool in the United States, but this year plans to replace it with GetThere. Outside North America, Novartis travelers in 2009 use KDS to book online, to which Novartis will add Traveldoo's system in Europe, the Middle East and Africa.

Novartis, which reduced its U.S. booked air volume last year by about 7 percent from 2008, again in 2009 tightened corporate travel policy as a means to achieve cost reductions. The firm restricted car service as an option for travel to and from airports only to those who are taking trips of at least three days.

The company, which in 2007 and 2008 rolled out an American Express corporate card globally, last year eliminated Amex's Membership Rewards program as an option for U.S. cardholders.

Novartis in 2009 also rebid its hotel program, selecting several chains as preferred suppliers, and similarly plans to renegotiate its airline contracts in 2011.

30 ABBOTT LABORATORIES

ABBOTT PARK, ILL.

2009 U.S. BOOKED AIR VOLUME: \$83.4 MILLION

PREFERRED VENDORS: UNITED, AMERICAN; AVIS; GETTHERE; CONCUR

CONSOLIDATED U.S. AGENCY: AMERICAN EXPRESS

In 2009, Abbott Laboratories reduced its U.S. booked air volume by more than \$6 million, according to *BTN* estimates, while increasing company sales by more than \$1 billion to \$30.8 billion, continuing a steady rise in revenues over the past couple of years. Sales in the United States accounted for \$14.2 billion of total sales.

As one of the top U.S. manufacturers of health care products, which it sells in about 130 countries through affiliates and distributors, Abbott Laboratories increased its number of employees by 4,000 last year to 73,000 from 69,000 in 2008.

Acquisitions in 2009 featured Solvay Pharmaceuticals, which expanded the company's footprint in Eastern Europe and emerging markets, adding approximately \$2.9 billion in annual sales.

The company also entered the vision care market with Advanced Medical Optics, which it augmented later in the year with Visiogen. It also added structural heart repair company Evalve and acquired advanced molecular diagnostics company Ibis Biosciences.

The company employs procurement tools and strategies in its travel and meetings purchasing. The procurement department sets limits on spending, while the company's meeting buyers are in charge of negotiating contracts with suppliers.

31 TIME WARNER

NEW YORK

2009 U.S. BOOKED AIR VOLUME: \$76.5 MILLION

PREFERRED VENDORS: UNITED, DELTA; AVIS, HERTZ, ENTERPRISE; CLIQBOOK

CONSOLIDATED U.S. AGENCY: NONE, BCD TRAVEL IS PRIMARY

BTN estimates Time Warner decreased U.S. booked air volume by more than 25 percent last year from \$106 million in 2008, as sales plummeted from \$46 billion to nearly \$26 billion. The company last year continued to focus on finding cost savings and making policy changes, including requiring nonrefundable ticket purchases for internal travel.

BCD Travel serves about 90 percent of the company, except for Time Inc., which uses Carlson Wagonlit Travel.

32 UNITED TECHNOLOGIES

HARTFORD, CONN.

2009 U.S. BOOKED AIR VOLUME: \$75.5 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$99.2 MILLION

U.S. T&E: \$259.4 MILLION

COMPANYWIDE T&E: \$340.8 MILLION

PREFERRED VENDORS: MARRIOTT, HILTON, INTERCONTINENTAL; AVIS; CWT HORIZON; SAP

CONSOLIDATED U.S. AGENCY: CARLSON WAGONLIT TRAVEL

After keeping its U.S. booked air volume flat in 2008, United Technologies saw spending on airlines from the U.S. point of sale drop dramatically in 2009, falling to \$75.5 million from \$110 million.

The defense contractor and technology manufacturing conglomerate made no major changes to policy in 2009, but some business units deployed pre-trip approval procedures. Last year, it initiated global corporate card and travel management services sourcing efforts, which continued into 2010. Its consolidated U.S. agency in 2009 was Carlson Wagonlit Travel, which, along with American Express, was also used outside of the United States. In 2009, United Technologies' travelers used corporate cards furnished by Citibank. Travelers used the CWT Horizon tool to book U.S. travel, with KDS as a preferred tool in other countries. UT this year aims to bolster policy and preferred supplier compliance.

33 KPMG

NEW YORK

2009 U.S. BOOKED AIR VOLUME: \$75 MILLION

PREFERRED VENDORS: AMERICAN, UNITED, DELTA; MARRIOTT, HILTON; HERTZ, AVIS; AMERICAN EXPRESS CTO, GETTHERE

CONSOLIDATED U.S. AGENCY: AMERICAN EXPRESS

KPMG last year continued a firmwide initiative to reduce travel expenses,

promote use of remote conferencing and enforce travel policy compliance that it implemented in 2008.

KPMG mandated use of preferred hotels wherever applicable, and the use of nonrefundable fares for all internal travel and meetings. The firm also required pre-trip approval for all international travel and the use of purpose-of-trip coding. It also continued to raise its adoption of online booking. As a result, the professional services firm and Big Four auditor cut U.S. booked air volume by \$35 million from the \$115 million it spent in 2008.

American Express served as KPMG's consolidated U.S. agency. Travelers use the Diners Club/MasterCard networks.

34 FEDEX

MEMPHIS, TENN.

2009 U.S. BOOKED AIR VOLUME:

\$74.7 MILLION

PREFERRED VENDORS: DELTA, AMERICAN, CONTINENTAL, AIR CANADA; HILTON, MARRIOTT, INTERCONTINENTAL, STARWOOD; HERTZ, NATIONAL; CLIQBOOK; ORACLE PEOPLESOFT

CONSOLIDATED U.S. AGENCY: NONE, BCD TRAVEL IS PRIMARY

BTN estimates FedEx cut its spending on U.S. airline tickets again last year, this time by more than \$15 million from \$90 million in 2008 after decreasing it from \$98 million in 2007, which was more than \$4 million less than the year before that.

Revenue also has declined from \$37.9 billion in May 2008 to \$35.5 billion in May 2009 to \$34.7 billion in May 2010.

In 2009, FedEx completed a rental car request for proposals and its migration from the Ariba e-form to the Cliqbook online booking tool.

FedEx drove compliance to its lowest available fare airline ticketing policy for FedEx Express and Services operating entities, further updated travel policies in international regions and communicated crisis-planning travel policies throughout the company.

The company uses Diners Club as its primary U.S. card and the American Express card elsewhere.

BCD Travel handles more than 80 percent of its volume both inside and outside the United States.

FedEx in its annual report said it "implemented several actions in 2009 to lower our cost structure."

35 DELL

ROUND ROCK, TEXAS

2009 U.S. BOOKED AIR VOLUME: \$70 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$100 MILLION

PREFERRED VENDORS: AMERICAN, CONTINENTAL, DELTA; HERTZ, ENTERPRISE; CLIQBOOK; CONCUR, ORACLE PEOPLESOFT

CONSOLIDATED U.S. AGENCY: AMERICAN EXPRESS

In November 2009, Dell acquired Perot Systems, which generated \$2.8 billion in sales in 2008. Both Dell and Perot reduced their overall travel and entertainment spending by 25 percent to 30 percent last year, with the combined entity spending \$70 million in 2009 U.S. booked air volume after Dell alone spent \$80 million in 2008.

Over 47 convenient connections
to Kazakhstan via Europe
with Air Astana



London Amsterdam Frankfurt Hanover Moscow Dubai Delhi Bangkok Beijing Seoul Baku Urumqi Novosibirsk Bishkek Kuala Lumpur

Air Astana together with its transatlantic partners offer over 47 immediate connections via Europe to Kazakhstan. We offer a comfortable and seamless journey from the US to Atyrau, Almaty, Astana and Uralsk, directly from 4 major gateways in Europe – Frankfurt, London, Amsterdam and Moscow with easy onward connections to all other domestic points. Direct flights also operate from Istanbul into Atyrau, Almaty and Astana.

In addition to Air Astana's direct services to the Asian gateways of Bangkok, Beijing, Urumqi and Seoul, Air Astana has expanded the network into the region with a direct service from Almaty to Kuala Lumpur.

5% commission on published fares.

For further information please visit www.airastana.com or contact our US office: 285 West Side Avenue, Suite 277, Jersey City, NJ 07305. Toll Free: 888 855 1557. Email: usa.sales@airastana.com, usa.reservations@airastana.com

From the heart of Eurasia

www.airastana.com



In 2009, Dell, which previously used a GE Capital MasterCard, migrated to use the American Express Corporate Card worldwide, which Perot had previously used.

In the spring of 2010, Dell globalized its T&E program and began efforts to globally consolidate its purchasing and corporate card programs, hotel program, meeting services and travel management company. Dell later this year will go out to bid for a single travel management company contract. It currently uses both Perot incumbent agency Carlson Wagonlit Travel and American Express.

In 2010, the combined company will consolidate its car rental services with Enterprise. Both entities already were using Concur's Cliqbook tool for online booking, and Dell will fully migrate next year from using Oracle's Peoplesoft to Concur for expense reporting.

35 ELI LILLY AND CO. INDIANAPOLIS, IND.

2009 U.S. BOOKED AIR VOLUME: \$70 MILLION

PREFERRED VENDORS: STAR ALLIANCE, AMERICAN, AIRTRAN; STARWOOD, HILTON, HYATT, MARRIOTT; NATIONAL; CLIQBOOK; IBM

CONSOLIDATED U.S. AGENCY: BCD TRAVEL

BTN estimates Eli Lilly slightly reduced its spending in 2009 from \$77 million in 2008. U.S. online travel reservations through Cliqbook increased slightly in 2008 to 40 percent of total transactions. Implementing a mandate in April 2009 increased online adoption to 75 percent.

Lilly continues to expand global use of the IBM expense reporting tool. Lilly employees use U.S. Bank Visa as its U.S. corporate card.

In a continuing effort to reduce costs by \$1 billion by the end of 2011, Lilly has closed a number of manufacturing and R&D facilities and reduced headcount by 5,000, despite adding 2,600 through acquisitions.

37 SAP WALLDORF, GERMANY

2009 U.S. BOOKED AIR VOLUME: \$67.4 MILLION

PREFERRED VENDORS: HERTZ

CONSOLIDATED U.S. AGENCY: BCD TRAVEL

Global enterprise software developer SAP cut its U.S. booked air volume by nearly another \$13 million from \$80 million in 2008 after an almost 30 percent reduction from 2007, according to BTN estimates.

The company, which has U.S. headquarters in Newtown Square, Pa., had 47,578 employees worldwide last year, with 4,900 in the United States. Sales dropped from \$16.3 billion to \$15.3 billion last year. More than 97,000 customers used its software in more than 120 countries.

BCD Travel handles SAP travel in the United States, and the company uses American Express Canada north of the border. The company manages travel planning through an internally developed online tool, which travelers must use for all but last-minute reservations and complicated itineraries. SAP has a lowest available fare policy for airline bookings.

38 BAE SYSTEMS LONDON

2009 U.S. BOOKED AIR VOLUME: \$65.7 MILLION

U.S. T&E: \$155 MILLION

COMPANYWIDE T&E: \$400 MILLION

PREFERRED VENDORS: UNITED, DELTA, AMERICAN; MARRIOTT, HILTON, HOLIDAY INN; HERTZ, ENTERPRISE; GETTHERE; CONCUR

CONSOLIDATED U.S. AGENCY: AMERICAN EXPRESS

BAE Systems held its travel spending fairly steady in 2009. The global defense contractor and aerospace firm's U.S. booked air volume was down only 6.5 percent compared with 2008 levels, even though miles traveled were up 2.2 percent. Companywide T&E remained the same as in 2008.

Last year, BAE Systems rolled out the managed meetings program across its entire enterprise, and this year, the company is working on increasing bookings through that department.

Travelers book through GetThere, and BAE Systems reported that 50 percent of U.S. air travel in 2009 was booked through that tool. American Express issues corporate cards to BAE Systems travelers.

39 GENERAL DYNAMICS FALLS CHURCH, VA.

2009 U.S. BOOKED AIR VOLUME: \$64.9 MILLION

PREFERRED VENDORS: DELTA, CONTINENTAL, UNITED, US AIRWAYS, ALASKA; MARRIOTT; HERTZ; CLIQBOOK

CONSOLIDATED U.S. AGENCY: NONE

While General Dynamics reported that its sales revenue increased 9 percent from \$29 billion in 2008 to \$32 billion, and barely reduced headcount from 92,000 in 2008 to 91,700, BTN estimates it cut its air spending more than 35 percent last year from \$100 million in 2008. The defense contractor continued to develop its data management capabilities and deploy Cliqbook online booking and Concur expense reporting tools.

The company also focused on consolidating its multinational travel management company contracts and integrating travel policies and practices. Carlson Wagonlit Travel services 40 percent and BCD Travel manages about one-third of General Dynamics' total air volume.

40 GENENTECH SOUTH SAN FRANCISCO, CALIF.

2009 U.S. BOOKED AIR VOLUME: \$64 MILLION

CONSOLIDATED U.S. AGENCY: BCD TRAVEL

Genentech this year is making its first appearance on the CT100 list under its name, following a 2009 merger with the Nutley, N.J.-based Hoffman-La Roche under the two companies' parent, Roche Holdings.

BTN estimates the combined 2009 U.S. booked air volume following the merger at \$64 million. BCD Travel serves as Genentech's consolidated U.S. agency, and along with HRG provides service to international travelers. American Express issues corporate cards for Genentech, and SAP provides expense management services globally.

41 PROCTER & GAMBLE CINCINNATI

2009 U.S. BOOKED AIR VOLUME: \$63.3 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$157.3 MILLION

U.S. T&E: \$173.3 MILLION

COMPANYWIDE T&E: \$406 MILLION

PREFERRED VENDORS: DELTA, UNITED, LUFTHANSA, AIR FRANCE; STARWOOD, MARRIOTT, HILTON; NATIONAL, ENTERPRISE, HERTZ; GETTHERE, AMADEUS E-TRAVEL; IBM

CONSOLIDATED U.S. AGENCY:

BCD TRAVEL

A year after ditching an arrangement to outsource its travel management operations to IBM, bringing them back in-house, consumer product conglomerate Procter & Gamble in 2009 developed an end-to-end strategy that includes agency standardization, expense management simplification and leveraging the associated data. Now developed, P&G is in the process of deploying the strategy throughout the company.

P&G dramatically cut travel expenses in 2009, slicing its U.S. booked air volume by more than \$50 million from 2008 levels and its total companywide travel and entertainment spend by more than 30 percent.

P&G this year is planning to develop a global corporate travel policy. About 55 percent of its air bookings in the United States are for international trips.

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.

The company uses BCD Travel for U.S. travel management services, and BTI, a retired joint venture between BCD and HRG Worldwide, services

P&G's international travel.

P&G retains one IBM tie through its use of IBM's Global Expense Reporting Solutions automated expense reporting platform.

42 GOLDMAN, SACHS & CO. NEW YORK

2009 U.S. BOOKED AIR VOLUME: \$62.8 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$149.3 MILLION

PREFERRED VENDORS: AMERICAN, DELTA, CONTINENTAL, CATHAY PACIFIC, BRITISH AIRWAYS; HILTON, RITZ-CARLTON, HYATT; HERTZ, AVIS; GETTHERE

CONSOLIDATED GLOBAL AGENCY: AMERICAN EXPRESS

Tunisair, the national carrier of Tunisia, operates scheduled service to over 50 destinations in Europe, Africa and the Middle East.

5% commission on published fares validated on TU/199.

Let's enjoy flying together

خطوط التونسية
TUNISAIR

Tunisair USA: 285 West Side Avenue, Suite 277, Jersey City, NJ 07305
Call: 201 526 7804 or E-mail: TU@groupsystemsamerica.com

57 NOKIA

ESPOO, FINLAND

2009 U.S. BOOKED AIR VOLUME: \$50 MILLION**PREFERRED VENDORS:** AMERICAN, BRITISH AIRWAYS, FINNAIR; GETTHERE**CONSOLIDATED U.S. AGENCY:** AMERICAN EXPRESS

Nokia in 2009 launched a new global travel policy and a new travel management structure that serves as a consulting service, providing managers with tools to assess and change cost center, department and individual travel purchasing behaviors.

The telecommunications firm has expanded the effort to change travel behavior that fit best with each department's goals throughout this year.

The travel policy emphasizes preferred supplier compliance, approval processes and responsible decision-making while limiting premium class travel. Economy is the approved class, though premium economy can be approved for overseas flights of more than five hours.

The firm also tightened control requirements and instigated centralized global reporting.

The changes helped Nokia reduce its U.S.-booked air spending to a *BTN*-estimated \$50 million.

Nokia offers a voluntary carbon-offset plan through which the company will reimburse travelers who pay to offset emissions.

58 MOTOROLA

SCHAUMBURG, ILL.

2009 U.S. BOOKED AIR VOLUME: \$47 MILLION**COMPANYWIDE BOOKED AIR VOLUME:** \$96 MILLION**PREFERRED VENDORS:** UNITED; MARRIOTT; AVIS; GETTHERE**CONSOLIDATED U.S. AGENCY:** AMERICAN EXPRESS

After modest spend reductions on travel in 2008, mobile phone and wireless equipment manufacturer Motorola saw its U.S. booked air volume in 2009 decline to \$47 million from \$83 million in 2008, as the company focused on reducing its employees' travel consumption.

Although Motorola operates under a global travel policy, the company's businesses and regions have the leeway to make adjustments if they need to further restrict guidelines in response to business conditions.

Though Motorola enacted no major companywide policy changes last year, some departments tightened travel and entertainment guidelines in 2009.

Motorola has been rolling out online booking tool GetThere globally in the past few years and garnered a 95 percent adoption rate in the United States last year. For expenses, most travelers use the Oracle system, though Asia/Pacific-based travelers use Concur.

In addition to serving as the company's consolidated travel agency, American Express also serves as Motorola's global preferred commercial payment system provider.

59 SANOFI-AVENTIS

PARIS

2009 U.S. BOOKED AIR VOLUME: \$46.8 MILLION**U.S. T&E:** \$65 MILLION**PREFERRED VENDORS:** CONTINENTAL, DELTA, AIR FRANCE; MARRIOTT, HILTON, ACCOR; AVIS; CLIQBOOK**CONSOLIDATED U.S. AGENCY:** BCD TRAVEL

Pharmaceutical company Sanofi-Aventis this year is turning its attention to North America, where it is implementing a new travel program with harmonized policies and a new online expense management system. The company currently uses an internally developed expense tool.

Sanofi-Aventis in 2009 targeted use of its Cliqbook online booking tool, increasing U.S. adoption by 10 percent to 67 percent. Compliance to travel policy increased by 5 percent, helping the company decrease its U.S. booked air volume by about 28 percent from 2008 levels.

Sanofi-Aventis' hotel costs fell by about 5 percent, and the company this year plans to implement hotel rate caps to include in its travel policy. The firm in 2010 also plans to further remote conferencing usage.

BCD Travel holds Sanofi-Aventis' U.S. travel business and a piece of its international travel. American Express and HRG Worldwide also serve Sanofi-Aventis outside of the United States.

60 COCA-COLA

ATLANTA

2009 U.S. BOOKED AIR VOLUME: \$44.8 MILLION**PREFERRED VENDORS:** DELTA, AIRTRAN, UNITED; HILTON; HERTZ; SAP**CONSOLIDATED U.S. AGENCY:** CARLSON WAGONLIT TRAVEL

The Coca-Cola Co. sliced more than \$18 million from its U.S. booked travel volume in 2009 after having cut by more than one-third in 2008 its 2007 U.S. point-of-sale spending of \$99 million, according to *BTN* estimates. Meanwhile, the number of employees rose by only 400 in the past year to 92,800.

Use of the online self-booking tool is required for domestic travel.

The company, which reported \$31 billion in sales in 2009 said in its 2009 annual report that it is "more than halfway toward our goal of driving out \$500 million in annualized operating expenses by 2011."

61 VERIZON COMMUNICATIONS

NEW YORK

2009 U.S. BOOKED AIR VOLUME: \$44.6 MILLION**COMPANYWIDE BOOKED AIR VOLUME:** \$53 MILLION**PREFERRED VENDORS:** AMERICAN, DELTA, US AIRWAYS, CONTINENTAL, UNITED; MARRIOTT, COURTYARD, DOUBLETREE;

NATIONAL, ENTERPRISE, AVIS; GETTHERE, ORBITZ FOR BUSINESS

CONSOLIDATED U.S. AGENCY: NONE, ORBITZ FOR BUSINESS IS PRIMARY

Telecommunications giant Verizon last year made moves to further globalize its travel program, initiating a global card program and transitioning 100 percent of its travel reporting and 90 percent of its customer-service handling to India.

The company this year continues its travel program rollout throughout the Europe, Middle East and Africa region, after which it will target a rollout to Asia/Pacific countries.

The company's primary U.S. agency is Orbitz for Business, and Carlson Wagonlit and American Express are used in some regions outside the United States.

Verizon travelers use the American Express corporate card for travel expenses, which are filed using an Oracle Peoplesoft system.

In the United States, Verizon Telecom and Verizon Business travelers use the GetThere tool for booking travel online, while Verizon Wireless employees use Orbitz for Business. The company achieved a 90 percent online booking adoption rate last year, and also instituted a pre-trip approval policy for some business groups.

Verizon this year plans to include JetBlue, which has become more aggressive in the corporate arena, as a preferred U.S. carrier.

62 MARSH & MCLENNAN

NEW YORK

2009 U.S. BOOKED AIR VOLUME: \$43.7 MILLION**COMPANYWIDE BOOKED AIR VOLUME:** \$80 MILLION**U.S. T&E:** \$130.3 MILLION**COMPANYWIDE T&E:** \$251.8 MILLION**PREFERRED VENDORS:** DELTA, UNITED, CONTINENTAL, BRITISH AIRWAYS; STARWOOD, MARRIOTT, HILTON; ENTERPRISE, HERTZ; GETTHERE, KDS; ORACLE IEXPENSE**CONSOLIDATED U.S. AGENCY:** BCD TRAVEL

Financial services firm Marsh & McLennan last year not only successfully lowered its U.S. booked air volume by about 20 percent from 2008 levels but completed a pair of key initiatives that redefined the travel program's operation: The company finished consolidating travel management services in the United States and United Kingdom with BCD Travel and developed a new internal travel management structure that will allow managers to engage employees on a client level with a consultative approach.

In that model, Marsh & McLennan's travel department will recommend methods to maximize savings, ensure traveler security and improve productivity. That effort, which continues this year, should help bolster policy compliance.

Marsh & McLennan's move to consolidate travel management services also is continuing this year with an effort to wrap more countries in Europe, the Middle East and Africa in the program. Last year, Marsh & McLennan hired a travel manager to oversee the Europe, Middle East and Africa region.

The company last year also made changes to its hotel program, renegotiating agreements and developing a hotel rate-cap program for key cities in the United States and United Kingdom.

Travel policies were strengthened in 2009 and 2010, and Marsh & McLennan is designing an enterprise-wide policy to cover all regions.

63 THOMSON REUTERS

NEW YORK

2009 U.S. BOOKED AIR VOLUME: \$43.2 MILLION**COMPANYWIDE BOOKED AIR VOLUME:** \$74.4 MILLION**U.S. T&E:** \$140 MILLION**PREFERRED VENDORS:** AMERICAN, US AIRWAYS, BRITISH AIRWAYS; HILTON, MARRIOTT, STARWOOD; NATIONAL, HERTZ, AVIS;

AMERICAN EXPRESS AXIOM, CWT HORIZON

CONSOLIDATED U.S. AGENCY: NONE, AMERICAN EXPRESS IS PRIMARY

Thomson Reuters' U.S. booked air volume fell to \$43.2 million last year, from \$52 million in 2008. Following the completion of Thomson's April 2008 acquisition of news and financial information services company Reuters, the combined company's travel team has worked to harmonize policy, refine processes and consolidate suppliers.

Those efforts continued with a revamp of its corporate travel policy, which was implemented in the first quarter this year. The company in 2009 worked to further consolidate its hotel program and car rental suppliers following a request-for-proposals process. An airline RFP and U.S. car service RFP are on the travel team's agenda this year.

Though its U.S. agency is not consolidated, American Express is Thomson Reuters' primary agency in the United States, with some operating units using Carlson Wagonlit Travel. Amex and CWT, along with FCm, also provide travel management services outside of the United States. Travelers who use American Express book travel online with the Rearden Commerce-based Axiom online booking tool, while travelers serviced by CWT used the Horizon tool in 2009. Elsewhere, travelers used GetThere, KDS or E-Travel in 2009 for online booking, though Thomson Reuters has been evaluating a preferred online booking tool provider. Thomson Reuters travelers use the American Express card for travel expenses, after renegotiating a contact with the card provider last year.

64 MCKESSON

SAN FRANCISCO

2009 U.S. BOOKED AIR VOLUME: \$43 MILLION**PREFERRED VENDORS:** GETTHERE**CONSOLIDATED U.S. AGENCY:** TRAVELOCITY BUSINESS

Healthcare and information services provider McKesson, one of only two Corporate Travel 100 companies to have consolidated U.S. travel with an Internet travel management company, in the past year has pushed videoconferencing as a method to reduce travel and enhanced its GetThere online booking tool with dynamic messaging capabilities to dissuade travelers from noncompliant or unnecessary travel.

Drop-down messages will not only alert travelers booking hotels or renting cars outside McKesson's preferred list of vendors, but also request that the traveler not continue the booking. Airfares booked within seven days of departure trigger similar dynamic messages. Travelers have the ability to submit a reason for the exception, but the messages otherwise have helped drive preferred vendor compliance.

Goldman, Sachs & Co. continued to make significant cuts to its travel budget in 2009, with its U.S. booked air volume down almost 30 percent from 2008 and more than 40 percent down from 2007.

Among its accomplishments in 2009, the Goldman Sachs travel team renewed a three-year contract with its consolidated global agency, American Express, and moved away from a management contract to a new contract based on transaction fees.

This year, the team is working with American Express' advisory team to manage the firm's air and hotel sourcing activity and to optimize its travel programs.

Goldman Sachs uses GetThere as its preferred booking tool, and it boosted its online adoption in the Americas to 71 percent in 2009. This year, the firm aims to increase online adoption in Europe, the Middle East and Africa as well as implement the tool in Asia. It also is working to reduce the number of online transactions that require manual intervention.

The company introduced a hotel tiering system in top cities, requiring travelers to book properties in specific tiers when available. In addition, it negotiated discounts with corporate housing providers.

Goldman Sachs last year introduced a ground transportation tool for its regional offices in the Americas to improve management of that spending category too.

As market conditions strengthened last year, Goldman Sachs revised its air policy to keep apace and also relaxed its policies regarding travel related to internal meetings.

43 MERCK & CO. WHITEHOUSE STATION, N.J.

2009 U.S. BOOKED AIR VOLUME: \$62.2 MILLION
COMPANYWIDE BOOKED AIR VOLUME: \$116.8 MILLION
U.S. T&E: \$310.6 MILLION
COMPANYWIDE T&E: \$464.9 MILLION
PREFERRED VENDORS: CONTINENTAL, US AIRWAYS, LUFTHANSA, DELTA; MARRIOTT, HILTON, STARWOOD; NATIONAL, ENTERPRISE, HERTZ; CLIQBOOK, AMADEUS E-TRAVEL; SAP
CONSOLIDATED U.S. AGENCY: AMERICAN EXPRESS

Merck & Co. is one of the very few companies on this list that spent more on travel in 2009 than it did in 2008, though the pharmaceutical giant's total companywide travel and entertainment spending increased by less than 1 percent. T&E spending in the United States, however, decreased by nearly 15 percent. The increase can be at least partly attributed to Merck's merger with former CT100 pharmaceutical cohort Schering-Plough, which was finalized in November 2009.

Much of Merck's 2009 was spent preparing for that merger, which had been announced eight months prior. The two companies' travel policies were harmonized in the interim, allowing for a fully unified policy to take effect on the day the merger became final.

This year, Merck is integrating the two companies' travel programs into a single entity and developing a portfolio of country-specific travel policy addenda.

Merck in 2009 also implemented a consolidated travel agency program in Europe, the Middle East, Africa and Latin America. BCD Travel and American Express share Merck's international agency business.

44 BARCLAYS LONDON

2009 U.S. BOOKED AIR VOLUME: \$61.7 MILLION
PREFERRED VENDORS: AMERICAN, DELTA, CONTINENTAL; HERTZ, AVIS, ALAMO; CLIQBOOK
CONSOLIDATED U.S. AGENCY: NONE, BCD TRAVEL IS PRIMARY

BTN estimates that Barclays reduced its U.S. booked air volume by more than \$2 million last year from \$64 million in 2008.

Barclays worked to complete the integration of Lehman Brothers as part of the travel program following its late 2008 \$1.75 billion acquisition, which boosted the company into the Corporate Travel 100 for the first time last year. In 2009, the company sold Barclays Global Investors to American money manager BlackRock for \$13.5 billion.

BCD Travel has served as Barclays' primary U.S. travel management company for many years.

45 DEUTSCHE BANK FRANKFURT, GERMANY

2009 U.S. BOOKED AIR VOLUME: \$61 MILLION
COMPANYWIDE BOOKED AIR VOLUME: \$209.4 MILLION
U.S. T&E: \$101 MILLION
COMPANYWIDE T&E: \$487 MILLION
CONSOLIDATED U.S. AGENCY: HRG

German financial services company Deutsche Bank last year made strides in globalizing its travel policies and driving savings.

The firm in 2009 renegotiated contracts for its airline, hotel and car rental suppliers as it expanded its travel program across 32 countries. This included standardizing processes, policy management and a technology platform supporting both pre- and post-trip reporting and traveler tracking. This also has included a reengineering of Deutsche Bank's strategic meetings management process in partnership with StarCite to develop electronic tools for budgeting, requests for proposals, reporting and reconciliation.

The bank in 2009 altered its policy regarding chauffeured car service in London and New York, moving the nighttime service window from 9 p.m. to 10 p.m.

The firm also brought its policies for short-haul economy travel in Asia in line with the rest of the world.

Global air volume was down by 19 percent compared with 2008 levels, while overall T&E was down by almost 18 percent. Decreases in the United States were more moderate, with U.S. booked air volume down 8 percent and U.S. T&E spending down about 5 percent.

Deutsche Bank uses HRG as its consolidated U.S. agency, while European travelers use BCD.

Travelers in the United States and the United Kingdom book their travel through GetThere, while travelers outside of those countries use Cliqbook, but travelers globally report expenses through Concur's tool. They also use American Express corporate cards.

46 MEDTRONIC FRIDLEY, MINN.

2009 U.S. BOOKED AIR VOLUME: \$60.3 MILLION
COMPANYWIDE BOOKED AIR VOLUME: \$108.1 MILLION
U.S. T&E: \$190.3 MILLION
COMPANYWIDE T&E: \$282.8 MILLION
PREFERRED VENDORS: NORTHWEST, UNITED, AMERICAN, DELTA; MARRIOTT, HILTON, STARWOOD; NATIONAL, AVIS, SIXT; GETTHERE, AMADEUS E-TRAVEL; EXPENSE EXPRESS
CONSOLIDATED GLOBAL AGENCY: AMERICAN EXPRESS

Medical device manufacturer Medtronic in 2009 turned to procurement practices to help slice about 12 percent off its 2008 U.S. booked air volume.

The company developed new scorecards to facilitate the travel department's management of its most valuable key performance indicators, helping to boost compliance.

Medtronic last year targeted travel demand management, an effort that continues in 2010, and the travel department offered individual business units new reporting tools, allowing managers the ability to analyze and subsequently influence the travel patterns and behavior of individual employees.

This year, Medtronic is analyzing the financial impact of a potential directive on the use of telepresence in lieu of travel.

The company in 2009 issued a new, more restrictive travel policy with strict guidelines and definitions of reasonable expenditure by supplier expense category, including hotels and meals.

American Express serves both as Medtronic's consolidated global travel management company and its card supplier. Medtronic uses Expense Express for online expense management throughout the world.

47 HONEYWELL MORRISTOWN, N.J.

2009 U.S. BOOKED AIR VOLUME: \$60 MILLION
COMPANYWIDE BOOKED AIR VOLUME: \$100 MILLION
U.S. T&E: \$148 MILLION
COMPANYWIDE T&E: \$281 MILLION
PREFERRED VENDORS: UNITED, DELTA, CONTINENTAL; MARRIOTT, HILTON, INTERCONTINENTAL; NATIONAL; GETTHERE, CLIQBOOK; CONCUR
CONSOLIDATED U.S. AGENCY: AMERICAN EXPRESS

Industrial and consumer supplies conglomerate Honeywell turned to its vendors and travelers in 2009 to help slice more than \$20 million of its 2008 U.S. booked air volume.

The company negotiated contracts in all major travel supplier categories, and though its roster of preferred vendors changed little, the process generated significant savings for Honeywell.

Meanwhile, the company pushed policy compliance, generating, for example, double-digit percentage increases in compliance levels with

preferred hotels, including newly added lower-tier properties.

Honeywell policy allows its lines of business to offer tighter controls than permitted by its overall corporate travel policy, and several have done so. For example, Honeywell restricts business class travel to eight-hour flights or longer, but some units have further limited it to 12-hour flights as a cost-saving measure. The overall corporate policy largely has remained unchanged, and no major alterations are planned in 2010.

The company's Honeywell Meetings Solutions department has long been on the vanguard of strategic meetings management, and Honeywell plans to broaden its scope outside the United States.

Honeywell last year initiated a change in its global corporate card program. It currently offers its travelers a Citibank MasterCard.

In 2010, Honeywell plans to further push policy compliance in the area of preferred hotel selection and booking online, the latter in particular overseas.

The company uses a GetThere self-booking tool provided by American Express in the United States and Cliqbook internationally, and travelers currently use the tools for 85 percent of applicable bookings worldwide.

Honeywell uses Cliqbook's parent, Concur, for automated expense reporting throughout the world.

The company's travel program in the United States is consolidated under American Express, which also handles some Honeywell business internationally, as does Carlson Wagonlit Travel and BCD Travel.

48 GLAXOSMITHKLINE LONDON

2009 U.S. BOOKED AIR VOLUME: \$59.6 MILLION
COMPANYWIDE BOOKED AIR VOLUME: \$198 MILLION
U.S. T&E: \$250 MILLION
COMPANYWIDE T&E: \$530 MILLION
PREFERRED VENDORS: AMERICAN, BRITISH AIRWAYS, US AIRWAYS; MARRIOTT, STARWOOD, HYATT; NATIONAL, ENTERPRISE, HERTZ; REARDEN; EXTENSITY
CONSOLIDATED U.S. AGENCY: NONE, BCD TRAVEL IS PRIMARY

GlaxoSmithKline saw its U.S. booked air volume decline from \$66 million in 2008 to \$59.56 million in 2009.

Spend optimization was a primary travel department goal last year, as it aimed to increase online booking adoption through its preferred Rearden tool and reduce the number of preferred hotel and airline suppliers to maximize savings through its transient program.

This year, the company plans to build on its reductions in overall T&E spending, source a global travel management company and continue its efforts to increase online booking adoption. Rearden is the company's preferred booking tool provider within the United States, and also is used in the United Kingdom, though travelers based in other parts of Europe used the Amadeus E-Travel system.

GlaxoSmithKline used primary U.S. agency BCD Travel for about 84 percent of its U.S. overall booked air volume. BCD Travel and HRG Worldwide, operating as BTI, last year were used for travel services outside the United States. GlaxoSmithKline travelers carry the American Express card for travel expenses.

49 TRANSOCEAN

LONDON

2009 U.S. BOOKED AIR VOLUME: \$57.3 MILLION
CONSOLIDATED U.S. AGENCY: CARLSON WAGONLIT TRAVEL

Offshore drilling contractor Transocean spent \$57.3 million in U.S. booked air volume, a slight decrease from last year, as its sales dropped from \$12.7 billion in 2008 to \$11.5 billion in 2009.

Transocean is a client of Carlson Wagonlit Travel's Energy Services Division.

In 2009, the company implemented a global data consolidation using third-party software, deployed a global profile management tool and initiated global reporting to improve cost management.

The company's 19,300 employees worked on a fleet of 138 mobile offshore drilling units last year.

50 INTERNATIONAL MONETARY FUND

WASHINGTON, D.C.

2009 U.S. BOOKED AIR VOLUME: \$55.9 MILLION
PREFERRED VENDORS: BRITISH AIRWAYS, AIR FRANCE, ALL NIPPON AIRWAYS, KOREAN AIR, AMERICAN; ORACLE PEOPLESOFT
CONSOLIDATED U.S. AGENCY: AMERICAN EXPRESS

One of the few organizations on this list to increase its 2009 U.S. booked air volume from 2008 levels—by more than 7 percent, in this case—the International Monetary Fund last year continued to refine its airline program, an effort it continues in 2010.

IMF, an international organization of 187 countries that aims to monitor and stabilize the global financial system, within the past few years changed its policy to mandate air travel with preferred suppliers, and last year pushed to further its travelers' adherence to that program.

This year, IMF implemented its first online pre-trip approval tool and re-bid its two-year airline contracts, with some changes to its roster of preferred vendors.

Only about 6 percent of the international organization's 2009 U.S. booked air volume was spent on domestic flights. The organization's travelers report their expenses through Oracle's PeopleSoft tool, and its cardholders use the Diners Club International card.

50 UBS

ZURICH, SWITZERLAND

2009 U.S. BOOKED AIR VOLUME: \$55.9 MILLION
PREFERRED VENDORS: AMERICAN, CONTINENTAL, SWISS; HERTZ
CONSOLIDATED U.S. AGENCY: NONE, BCD TRAVEL IS PRIMARY

B7N estimates UBS's U.S. booked air volume dropped by more than \$34

million from \$90 million in 2008, as a result of declining business and cost-cutting measures, while its total sales plummeted from \$84.5 billion to \$40 billion.

Meanwhile, headcount was down by 12,550 employees or 16 percent from year-end 2008 to 65,233 employees, with 15,500 employees located in the United States. The global financial services firm said personnel reductions came from various business divisions, as well as reductions from the sale of UBS Pactual, UBS's India Service Centre and 56 branches of Wealth Management Americas.

In 2009, UBS personnel worked in 57 countries, with approximately 37 percent employed in Switzerland, 36 percent in the Americas, 16 percent in Europe, the Middle East and Africa and 11 percent in Asia Pacific.

UBS maintains headquarters in Zurich and Basel, where travel is supported by HRG Switzerland.

BCD Travel is its primary U.S. travel management company service provider, with American Express as its secondary.

Its travelers use a UBS Visa company card.

The firm encourages its employees to use environmentally friendly travel alternatives. Since 2006, UBS has offset 100 percent of its carbon emissions from business-related air travel, representing about one-quarter of the company's overall annual emissions. UBS indirectly neutralizes its business air travel emissions by investing in third-party projects in Brazil, Russia, India, China, Turkey and Germany that reduce an equivalent amount of greenhouse gas emissions.

52 ROYAL DUTCH SHELL

THE HAGUE, THE NETHERLANDS

2009 U.S. BOOKED AIR VOLUME: \$53.9 MILLION
PREFERRED VENDORS: CONTINENTAL, UNITED; INTERCONTINENTAL, STARWOOD, HILTON; AVIS, ENTERPRISE; KDS; SAP
CONSOLIDATED U.S. AGENCY: CARLSON WAGONLIT TRAVEL

Global petrochemical company Royal Dutch Shell last year reduced U.S. booked air volume nearly 40 percent from \$89 million in 2008. The travel management team achieved those savings through negotiated discounts and continued to encourage travel alternatives.

As of spring 2009, Shell was using four Hewlett-Packard Halo telepresence studios in Houston, London, Singapore and its headquarters in The Hague.

In addition, Shell targeted decreasing internal travel by implementing several demand management strategies, including internal trip authorization procedures in some divisions, use of its online booking tool for point-to-point travel and increased communications using the Microsoft Office Communicator tool and Microsoft Live Meetings.

The travel team also communicates with travelers through a global travel website with country pages, e-mails and a quarterly newsletter.

The company worked last year to maintain customer service satisfaction thresholds and explore hotel program consolidation. Carlson Wagonlit Travel is Shell's consolidated U.S. agency and is the primary travel service provider internationally for about 30 countries. HRG handles some international points of sale.

In 2010, the travel team is focusing on conducting a complete policy review and ensuring a balance between savings and employee safety.

53 CREDIT SUISSE

ZURICH, SWITZERLAND

2009 U.S. BOOKED AIR VOLUME: \$52.1 MILLION
COMPANYWIDE BOOKED AIR VOLUME: \$149 MILLION
PREFERRED VENDORS: AMERICAN, CONTINENTAL, DELTA, BRITISH AIRWAYS, SWISS; LEADING HOTELS, FOUR SEASONS, STARWOOD; HERTZ; CLIQBOOK; CONCUR
CONSOLIDATED U.S. AGENCY: HRG

International financial services group Credit Suisse in 2009 reduced U.S. booked air volume more than 21 percent year over year. Companywide booked air declined by almost 30 percent.

Some savings came from tighter premium class restrictions. Credit Suisse in 2009 eliminated first-class air travel altogether and mandated economy for flights lasting three hours or less outside the United States.

The group recently switched to online booking tool Cliqbook and in 2009 maintained the 62 percent online booking rate it achieved in 2008.

American Express issues corporate cards for Credit Suisse travelers.

HRG remains Credit Suisse's consolidated agency in the United States and handles some of the firm's travel needs elsewhere.

54 CISCO SYSTEMS

SAN JOSE, CALIF.

2009 U.S. BOOKED AIR VOLUME: \$51.3 MILLION
COMPANYWIDE BOOKED AIR VOLUME: \$112.1 MILLION
COMPANYWIDE T&E: \$276.8 MILLION
PREFERRED VENDORS: STAR ALLIANCE, ONEWORLD, SKYTEAM; HILTON, STARWOOD, INTERCONTINENTAL, MARRIOTT, ACCOR, FAIRMONT; HERTZ, AVIS; GETTHERE; ORACLE IEXPENSE
CONSOLIDATED GLOBAL AGENCY: AMERICAN EXPRESS

Cisco Systems achieved \$206 million in cumulative savings and overall reductions in travel spending for the 2009 fiscal year and decreased its U.S. booked air volume by 52 percent, year over year. Compared with the 2008 fiscal year, Cisco reduced its average ticket price by 13 percent globally. Airline contracts resulted in \$12.2 million in savings.

In 2009, 91 percent of the company's travel spending went through Sabre's platform, which is managed through one of Cisco's three dedicated travel centers. Cisco completed moving 52 markets, representing 91 percent of its total spending, into three dedicated call centers.

The company tightened its meetings policies in 2009, requiring senior vice president approval for all internal meetings. The company increased use of its virtual technology to create an integrated travel program that includes face-to-face meetings, virtual meetings using Cisco's TelePresence and online meetings using Cisco's WebEx. Cisco Systems now has over 800 TelePresence rooms deployed in 230 major cities across 57 countries.

Cisco also acquired three additional technology companies: Tandberg in Oslo, Norway; Starent Networks in Tewksbury, Mass.; and Scan Safe in London and San Francisco.

GetThere is the preferred booking tool for Cisco travelers globally and is deployed in 56 countries. In 2009, 89 percent of domestic U.S. transactions were booked online. This year, Cisco's continued focus is on adoption of preferred vendors. Cisco also is focused on increasing booking tool usage to raise its level of touchless booking to 80 percent globally.

Cisco is improving metrics and senior management reporting and exploring such travel technology as mobility and cloud reporting.

55 SCIENCE APPLICATIONS INTERNATIONAL CORP.

MCLEAN, VA.

2009 U.S. BOOKED AIR VOLUME: \$51 MILLION
COMPANYWIDE BOOKED AIR VOLUME: \$75 MILLION
PREFERRED VENDORS: UNITED, DELTA; MARRIOTT, HILTON, HYATT; HERTZ, BUDGET; GETTHERE; DELTEK COSTPOINT
CONSOLIDATED U.S. AGENCY: TRAVEL MANAGEMENT PARTNERS

Government contractor and scientific, engineering and technology company Science Applications International Corp. saw U.S. booked air volume drop modestly in 2009 to \$51 million from \$55 million in 2008.

The company, which last year moved its headquarters from San Diego to McLean, Va., continued to tighten policy and enforcement in 2009, following a move in 2008 to mandate travel policy for the first time. The policy now requires the use of the internal SAIC Travel portal in the United States. SAIC this year continues to roll out GetThere and drive traveler adoption of the tool in the United States. The company also this year moved to mandate the use of nonrefundable airfares.

The company uses Raleigh, N.C.-based Travel Management Partners as its consolidated agency in the United States, where about 90 percent of SAIC's U.S.-booked air volume is concentrated. Though SAIC does not have a consolidated agency outside of the United States, the company uses ATPi in some regions.

The company's travelers use U.S. Bank for corporate travel card transactions and Deltek Costpoint to file expenses in the United States.

56 UNITED NATIONS

NEW YORK

2009 U.S. BOOKED AIR VOLUME: \$50.2 MILLION
PREFERRED VENDORS: US AIRWAYS, DELTA, AIR FRANCE, LUFTHANSA, AMERICAN; GETTHERE; CONCUR
CONSOLIDATED U.S. AGENCY: AMERICAN EXPRESS

With \$50.2 million in U.S. booked air volume last year, the United Nations is one of the few Corporate Travel 100 organizations to see a lift in air volume, though modest, during the abysmal 2009 travel landscape.

A longtime American Express client, the U.N. last year rebid its travel management services contract, expecting to finalize request-for-proposal efforts this year.

Virtually all of U.N. travel from the U.S. point of sale is international. The United Nations does not have a formal hotel or rental car program. Travelers use Concur or Oracle when filing travel expenses.

Individual McKesson business units can and in some cases do offer stricter travel policies than the McKesson corporate policy, which includes such planks as a seven-day advance purchase window and a requirement that travelers use lowest logical nonrefundable fares, with which 93 percent of its bookings are in compliance. About 92 percent of its tickets are booked online, of which 95 percent are handled without manual intervention through fulfillment.

McKesson, which has a growing sustainability program, is a launch customer for Cisco's TelePresence and uses the high-definition video-conferencing technology in four major locations and one dozen smaller ones across North America.

Travelocity Business, in addition to serving as McKesson's consolidated U.S. agency, also holds a piece of its international business, including two divisions in Canada that were consolidated in the program early last year and have shown 95 percent compliance, driving transaction fee expenditures down and increasing buying power with airlines.

65 EMC HOPKINTON, MASS.

2009 U.S. BOOKED AIR VOLUME: \$42.1 MILLION

PREFERRED VENDORS: UNITED, AMERICAN, DELTA, CONTINENTAL, AIR CANADA; NATIONAL; GALILEO; CLIQBOOK; CONCUR
CONSOLIDATED GLOBAL AGENCY: AMERICAN EXPRESS

EMC Corp., the data management and storage systems provider, continued to make drastic cuts in its U.S. point-of-sale air spending last year, according to *BTN* estimates, reducing its spending by nearly \$56 million from \$98 million in 2008 after lowering its spend from \$133 million in 2007. At the same time, the company raised its number of employees slightly from 42,000 to 43,200 as a result of its acquisitions of FastScale Technology, Configuresoft and Verid.

EMC continued to raise the use of its Cliqbook online booking tool last year, requiring its use for all domestic travel. It further advanced its auditing and attainment of compliance with policy and preferred vendors.

EMC used American Express as its consolidated global agency and provider of more than 10,000 cards.

66 OMNICOM GROUP NEW YORK

2009 U.S. BOOKED AIR VOLUME: \$42 MILLION

PREFERRED VENDORS: AMERICAN, US AIRWAYS, LUFTHANSA, JAPAN AIRLINES, BRITISH AIRWAYS; BUDGET, HERTZ; GETTHERE
CONSOLIDATED U.S. AGENCY: NONE, CARLSON WAGONLIT IS PRIMARY

Continuing an effort to cut travel costs through corporate travel policy restrictions it began in 2008, marketing and advertising conglomerate Omnicom Group last year further toughened existing policies and allowed fewer exceptions to its rules.

Omnicom in 2009 required all airfares to be booked with at least seven days in advance of the flight and directed travelers to take full advantage

of nonrefundable fares. It also tightened its policy on eligible premium class travel, shifting those once eligible for first class into business class and those cleared for business class into premium economy class.

Omnicom cut travel by 23 percent from 2008 levels and its U.S. booked air volume by more than one-quarter, discouraging any corporate travel that did not directly address client needs.

Omnicom does not have a consolidated U.S. travel management company—its primary, Carlson Wagonlit Travel, holds about 60 percent of its U.S. business—but completed an agency request-for-proposals process it began last year. Omnicom retained CWT, but switched its secondary U.S. agency vendor from HRG to BCD Travel.

The company this year also will switch online booking tools in the United States from GetThere to Cliqbook. Like many firms in its field, online booking rates at Omnicom remain in the single digits.

67 WPP DUBLIN, IRELAND

2009 U.S. BOOKED AIR VOLUME: \$41.8 MILLION

PREFERRED VENDORS: TRAVELPORT
CONSOLIDATED U.S. AGENCY: NONE, USES HRG

Media and communications conglomerate WPP, which includes Grey Worldwide, JWT, Ogilvy & Mather and Young & Rubicam, cut its U.S. booked air volume last year by more than \$21 million from \$63 million in 2008, according to *BTN* estimates. Total sales grew from \$10.8 billion in 2008 to \$13.8 billion in 2009, while employment declined from 112,000 to 105,318 working for more than 150 companies in 107 countries.

According to WPP's 2009 annual report, "The main contributors to our carbon footprint are office energy use (57 percent) and business air travel (30 percent)." WPP said it reduced CO₂ emissions from air travel from 89,500 tons in 2008 to 76,073 in 2009. WPP encourages employees to use videoconferencing, saying, "We have successfully trialed high-definition videoconferencing in London and New York, and we are investing to set up facilities in key cities around the world."

"By the end of 2009," the report continued, "we had installed 65 high-definition videoconferencing units around the world, including 40 shared units, which can be used by any WPP company. In 2010, we will install another 35 shared units, bringing the total to 75 shared sites."

68 AT&T DALLAS

2009 U.S. BOOKED AIR VOLUME: \$41.6 MILLION

PREFERRED VENDORS: AMERICAN, CONTINENTAL, DELTA; AVIS, HERTZ
CONSOLIDATED GLOBAL AGENCY: AMERICAN EXPRESS

Communications giant AT&T saw its U.S. booked air volume decrease from \$50 million in 2008 by nearly another \$9 million, as it did the year before, according to *BTN* estimates, as its number of employees dropped to 283,000 in 2009 from 301,000 in 2008.

Helping to drive down those expenses was a greater use of the company's preferred travel purchasing tool.

In addition to its preferred carriers, the company has a lowest logical airfare policy in place.

AT&T increased its solid booking adoption rate and continued to make strides last year in using its central meetings registration desk to capture all of its meetings data.

69 CSC FALLS CHURCH, VA.

2009 U.S. BOOKED AIR VOLUME: \$41 MILLION

PREFERRED VENDORS: AMERICAN, STAR ALLIANCE, DELTA; HILTON, MARRIOTT, EXTENDED STAY HOTELS; GETTHERE; CONCUR; DINERS CLUB

CONSOLIDATED GLOBAL AGENCY: CARLSON WAGONLIT TRAVEL

BTN estimates information technology company CSC last year cut 18 percent from its 2008 U.S. booked air volume of \$50 million.

CSC uses Diners Club as its consolidated global corporate card provider.

A major government and defense contractor, CSC generates about 40 percent of its revenues from U.S. federal agencies.

Sales revenues were up slightly to \$16.7 billion in 2009 from \$16.5 billion in 2008. It also increased its number of employees to 94,000 up from 89,000 in 2008.

70 GENERAL MOTORS DETROIT

2009 U.S. BOOKED AIR VOLUME: \$40 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$75 MILLION

U.S. T&E: \$75 MILLION

COMPANYWIDE T&E: \$125 MILLION

PREFERRED VENDORS: DELTA, AMERICAN, LUFTHANSA; MARRIOTT, STARWOOD, INTERCONTINENTAL; AVIS, ENTERPRISE; AXO, GETTHERE; IBM

CONSOLIDATED GLOBAL AGENCY: AMERICAN EXPRESS

With the assistance of federal bailout funds, General Motors restructured under bankruptcy protection in 2009, trimming its brand portfolio, closing plants and reducing headcount. As such, the automaker reduced U.S. booked air volume by 60 percent in 2009 and U.S. travel and entertainment spending by about half.

Not all of the volume reduction came from the restructuring. GM last year also improved compliance to preferred suppliers and tightened premium class restrictions for international air travel.

GM also implemented a formal, written pre-trip approval process globally in 2009.

Nearly all GM U.S. booked air travel flowed through its consolidated global agency American Express' AXO online booking tool. GetThere supplies the booking tool for GM employees outside of the country. GM

this year is deploying online booking capabilities to regions in South America and Europe, where no booking tools previously were in use.

Citibank-issued MasterCards are the preferred payment tool for GM travelers.

This year, GM aims to formalize its meetings policies and program. It also is formalizing its policies related to ancillary airline fees.

70 NEWS CORP. NEW YORK

2009 U.S. BOOKED AIR VOLUME: \$40 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$56 MILLION

PREFERRED VENDORS: AMERICAN, DELTA, CONTINENTAL, BRITISH AIRWAYS; HILTON, MARRIOTT, INTERCONTINENTAL; HERTZ, NATIONAL, ENTERPRISE; GETTHERE

CONSOLIDATED U.S. AGENCY: HRG

Media conglomerate News Corp. last year consolidated its travel management operations in the United Kingdom and Germany with subsidiaries of mega travel management company HRG Worldwide. HRG also serves as News Corp.'s consolidated agency in the United States. Other agencies remain in the program to serve other countries.

With the United Kingdom and Germany now part of the consolidated program, News Corp. has begun to roll out the GetThere online booking tool in those areas. In 2010, the company is working to bring more European countries into its program and online with GetThere.

News Corp. in 2009 also renegotiated its global corporate card program, sticking with preferred worldwide vendor American Express.

The company last year introduced a preferred chauffeured transportation provider in New York City, the site of its global headquarters, and plans to expand that program to all U.S. points of sale in 2010. Meanwhile, the company signed global car rental deals with Hertz, Enterprise and Enterprise's National brand.

News Corp. restricted its travelers' ability to fly in premium classes in 2009 and plans to renegotiate all air contracts in 2010. The company last year cut more than one-quarter from its 2008 U.S. booked and companywide air spending. News Corp. also introduced more lower-tier properties into its hotel program, driving costs down.

70 VIACOM NEW YORK

2009 U.S. BOOKED AIR VOLUME: \$40 MILLION

PREFERRED VENDORS: AMERICAN, DELTA, CONTINENTAL; STARWOOD, FOUR SEASONS, HAMPTON INN; HERTZ, BUDGET; CLIQBOOK, GETTHERE; IBM, CONCUR.

CONSOLIDATED U.S. AGENCY: NONE, CARLSON WAGONLIT IS PRIMARY

Television, film and media firm Viacom last year tightened premium class air travel policy, while the company this year is enhancing hotel policy to bolster usage of preferred hotels.

The company continues to use multiple travel management compa-

nies, with Carlson Wagonlit Travel handling the bulk of its travel volume in the United States.

While CWT handled about 60 percent of the company's 2009 U.S. booked air volume, outside the United States, the company also used other agencies, including HRG and BCD Travel.

The company this year is focusing efforts on consolidating aspects of its travel program in the Europe, Middle East and Africa region.

Paramount travelers make online bookings using the Concur Cliqbook tool and file expenses with Concur, while Viacom travelers use GetThere for booking and the IBM tool for expenses.

The company last year implemented a custom-built pre-trip approval tool with Carlson Wagonlit.

Corporate travelers carry the Bank of America MasterCard to pay for travel and entertainment expenses.

73 BOSTON SCIENTIFIC

NATICK, MASS.

2009 U.S. BOOKED AIR VOLUME: \$39 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$61 MILLION

U.S. T&E: \$129 MILLION

COMPANYWIDE T&E: \$181 MILLION

PREFERRED VENDORS: DELTA, AMERICAN, UNITED; MARRIOTT, HILTON, STARWOOD; HERTZ; GETTHERE, KDS; IBM

CONSOLIDATED U.S. AGENCY: NONE, AMERICAN EXPRESS IS PRIMARY

Boston Scientific is undergoing the process of globalizing its travel program under a single travel management company.

The developer and marketer of medical technology last year issued requests for proposals for a global travel management company and this year will conclude that process and issue global RFPs for airline and car rental contracts. Currently, American Express handles about 65 percent of Boston Scientific's U.S. travel volume, while Carlson Wagonlit Travel handles 30 percent and FCm Travel Solutions handles the remaining 5 percent. CWT and FCm also handle the company's travel outside of the United States.

Boston Scientific shaved about 20 percent off its U.S. booked air volume in 2009 and almost 13 percent off companywide travel spending. A new global travel policy restricts business class air travel to eight-hour flights at a minimum, with the exception of upper-level executives, and limits laundry and dry cleaning expenses to \$30.

Travelers also now are required to submit receipts for every business expense, and Boston Scientific in 2009 reiterated its policy for travelers to buy nonrefundable tickets only by at least 14 days in advance.

Boston Scientific also implemented a quarterly divisional scorecard so that all financial controllers within the company can compare spending levels. This year, Boston Scientific continues to tighten policies, including adding pre-trip approval for all in-house, non-sales travel below the managerial level.

The company's travelers book through GetThere in the United States and through KDS abroad. Online adoption at Boston Scientific reached 48 percent in 2009, up from 30 percent in 2008.

American Express supplies corporate cards and travelers report their U.S. expenses through IBM's expense management tool.

73 FLUOR

IRVING, TEXAS

2009 U.S. BOOKED AIR VOLUME: \$39 MILLION

PREFERRED VENDORS: DELTA, CONTINENTAL, AMERICAN; MARRIOTT, HYATT, HILTON; AVIS

CONSOLIDATED U.S. AGENCY: AMERICAN EXPRESS

One of the world's largest international design, engineering and construction firms reduced its U.S. booked air spending by more than 20 percent from the \$51 million it spent the previous year, according to *BTN* estimates, as it continued aggressive efforts to consolidate and centralize its global travel program and further tighten its travel policy.

Having integrated its Canadian travel program with its operations in the United States, Fluor last year completed integrating London and made strides toward completing its travel consolidation of Western Europe.

American Express provides Fluor with travel management company services, corporate payment services and its Axiom product for booking travel and related services in North America.

The company had 36,152 employees in 2009. Fluor's sales revenue last year was down slightly from the previous year from \$22.3 billion to \$22 billion.

75 BOOZ ALLEN HAMILTON

MCLEAN, VA.

2009 U.S. BOOKED AIR VOLUME: \$38 MILLION

COMPANYWIDE T&E: \$106 MILLION

PREFERRED VENDORS: UNITED, DELTA, AMERICAN; MARRIOTT, HILTON, STARWOOD; NATIONAL, HERTZ; CLIQBOOK; CONCUR

CONSOLIDATED U.S. AGENCY: AMERICAN EXPRESS

Booz Allen Hamilton returns to the Corporate Travel 100 list this year following the spinoff of the Booz & Co. commercial management consulting arm in 2008, which left the firm last year still with more than \$100 million in annual travel and entertainment spending.

Booz Allen is one of the few companies on this list that actually boosted 2009 travel expenditures compared with 2008 as the company, now largely a government contractor, increased travel to the Middle East and Asia/Pacific regions.

As Booz Allen made that transition, its travel team updated travel policies to align with federal policies, a process that continues this year.

The company launched an individual bill, central pay process for its corporate card program, supplied by American Express. American Express also serves as Booz Allen's consolidated agency.

In addition, the company moved to the Concur Travel & Expense platform, using the integrated Cliqbook booking tool and Concur tool for expense reporting.

Booz Allen boosted online adoption on Cliqbook from 30 percent to 60 percent in 2009, due in part to stronger policy language directing travelers to use preferred booking tools and travel suppliers.

76 EMERSON ELECTRIC

ST. LOUIS

2009 U.S. BOOKED AIR VOLUME: \$37.8 MILLION

PREFERRED VENDORS: STAR ALLIANCE, SKYTEAM; BEST WESTERN, LA QUINTA, INTERCONTINENTAL, STARWOOD, CANDLEWOOD, STAYBRIDGE; AVIS, NATIONAL, ENTERPRISE; GETTHERE; ORACLE
CONSOLIDATED U.S. AGENCY: NONE, CWT IS PRIMARY

Emerson Electric cut its U.S. booked air volume by nearly 40 percent from the \$97 million it spent in 2008, according to *BTN* estimates.

Emerson uses American Express and Carlson Wagonlit for U.S. travel management and the American Express corporate card. It reduced employees from 141,000 to 129,000. Sales decreased by 15.7 percent to \$20.9 billion. Emerson generated 55 percent of revenue outside the United States in 2009. Sales in emerging markets represented 32 percent.

77 UNITEDHEALTH GROUP

MINNETONKA, MINN.

2009 U.S. BOOKED AIR VOLUME: \$37.7 MILLION

U.S. T&E: \$102.6 MILLION

COMPANYWIDE T&E: \$106.3 MILLION

PREFERRED VENDORS: DELTA, AMERICAN, CONTINENTAL; HERTZ, ENTERPRISE; CLIQBOOK

CONSOLIDATED U.S. AGENCY: AMERICAN EXPRESS

UnitedHealth Group last year saw its U.S. booked air volume fall to \$37.7 million from \$49 million in 2008. After implementing Concur's Cliqbook booking platform in 2008, UnitedHealth last year expanded usage and reach of the tool, efforts that continue in 2010 and into 2011.

U.S.-based UnitedHealth travelers booked about 85 percent of the company's air transaction through Cliqbook in 2009. The company also uses Concur for expense reporting globally and last year integrated booking and expense in the United States, with plans to do the same in the United Kingdom, France, Netherlands, Spain, Australia and Germany.

Following a three-year contract renewal in 2008, American Express remains the company's U.S. consolidated agency and serves as its preferred corporate T&E card supplier. UnitedHealth this year is working to implement an international corporate card.

78 CONOCOPHILLIPS

HOUSTON

2009 U.S. BOOKED AIR VOLUME: \$37 MILLION

U.S. T&E: \$75 MILLION

PREFERRED VENDORS: CONTINENTAL, DELTA, AIR FRANCE, KLM, BRITISH AIRWAYS, SAS; MARRIOTT, INTERCONTINENTAL, HILTON; ENTERPRISE/NATIONAL, AVIS; GETTHERE, AMADEUS E-TRAVEL; SAP
CONSOLIDATED U.S. AGENCY: AMERICAN EXPRESS

Integrated energy company ConocoPhillips reduced spending across all travel categories in 2009, with U.S. booked air volume down 36 percent and U.S. travel spending down 38 percent compared with 2008 levels.

American Express handles the firm's U.S. travel management needs. Amex, HRG and U.K.-based Capita Business Travel serve as the company's TMCs overseas. ConocoPhillips is conducting a global airline RFP this year. About 30 percent of its U.S. air travel went through the GetThere booking tool in 2009. Travelers outside of the United States use the Amadeus' E-Travel tool. JPMorgan issues corporate cards for ConocoPhillips' U.S. travelers. All travelers report expenses through SAP.

79 INTERPUBLIC GROUP

NEW YORK

2009 U.S. BOOKED AIR VOLUME: \$36.6 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$53.8 MILLION

PREFERRED VENDORS: AMERICAN, DELTA, CONTINENTAL, BRITISH AIRWAYS; W HOTELS, WESTIN, LEADING HOTELS OF THE WORLD; AVIS, NATIONAL, BUDGET; CLIQBOOK; CONCUR

CONSOLIDATED U.S. AGENCY: AMERICAN EXPRESS

Advertising and marketing services conglomerate Interpublic Group continues to roll out multinational travel management services. Last year, it consolidated travel and card processes in 92 business units in the Asia/Pacific region, including Singapore, Hong Kong, Australia, Japan and China. The company also consolidated an additional seven countries and 47 business units in Europe, the Middle East and Africa, a region where Interpublic expanded the Trondent independent profile system. As of end of 2009, the Interpublic travel program was consolidated in 126 countries, consisting of 580 business units.

This year, Interpublic continues to consolidate on a multinational basis its travel, profile system and corporate card program, with particular attention paid to Latin America. It also is focusing on online booking in Europe and is rolling out consistent meetings management processes.

American Express, along with HRG and Australia-based Bay Travel, provide travel services to Interpublic outside of the United States. Travelers in the United States carried either an American Express or Diners/MasterCard card in 2009 for travel expenses. In North American markets, the company last year expanded use of its preferred Cliqbook booking tool to more than 70 percent adoption with a 92 percent first-pass yield.

80 CARGILL

WAYZATA, MINN.

2009 U.S. BOOKED AIR VOLUME: \$36.5 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$73 MILLION

U.S. T&E: \$81.2 MILLION

COMPANYWIDE T&E: \$162.4 MILLION

PREFERRED VENDORS: DELTA, AMERICAN, KLM; INTERCONTINENTAL, HILTON, STARWOOD; NATIONAL, ENTERPRISE, AVIS; RESX, AMADEUS E-TRAVEL; ADSOFT/EXPENSE EXPRESS
CONSOLIDATED U.S. AGENCY: AMERICAN EXPRESS

Agribusiness giant Cargill turned its attention to traveler compliance last year and nearly halved its companywide travel and entertainment spending compared with 2008 levels.

The company—the second-largest privately held company in the United States, according to *Forbes*—in 2009 reduced its U.S. booked air volume by 27 percent and U.S. travel spending by almost 22 percent.

Cargill in 2009 conducted an extensive analysis of its air travel patterns, leading to requests for proposals and ultimately a new air program. Additionally, the company saw online booking compliance increase by 24 percent, with 90 percent of U.S. booked air going through preferred tool ResX.

Cargill also expanded its meetings management program in 2009.

This year, Cargill is pushing compliance to preferred hotels, expanding the company's traveler security program and increasing the cohesiveness between the U.S. and global travel teams. American Express serves as Cargill's consolidated agency in the United States and also supplies corporate cards for Cargill travelers. The company uses American Express, Carlson Wagonlit Travel and HRG globally.

81 NESTLÉ

VEVEY, SWITZERLAND

2009 U.S. BOOKED AIR VOLUME: \$36.4 MILLION
CONSOLIDATED U.S. AGENCY: BCD TRAVEL

Nestlé's companies in the United States booked air volume of \$36.4 million in 2009, a slight reduction from 2008.

Nestlé in the United States consists of five main businesses: Nestlé Nutrition, Nestlé Professional, Nestlé Purina PetCare Company, Nestlé USA and Nestlé Waters North America. Together, these companies operate in more than 120 locations in 47 states and employ more than 44,000 people. In 2009, Nestlé reported product sales in the United States totaled more than \$28 billion.

82 PUBLICIS GROUPE

PARIS

2009 U.S. BOOKED AIR VOLUME: \$35.5 MILLION
PREFERRED VENDORS: AMERICAN, DELTA; AVIS
CONSOLIDATED U.S. AGENCY: CARLSON WAGONLIT TRAVEL

Publicis in 2009 reduced its U.S. booked air volume to \$35.5 million and headcount to 44,727 worldwide, with 15,000 in the United States, as sales revenue declined slightly to \$6.5 billion from \$6.6 billion in 2008.

In its 2009 annual report the company said, "Tight control over our costs and headcount; services with added value; these are some of the reasons why we were able to achieve an operating margin which remains one of the highest on the market despite the crisis."

Operating offices in more than 200 cities and 100 countries, the company includes large advertising networks, such as Leo Burnett,

Fallon Worldwide, Digita, Razorfish and Saatchi & Saatchi, and such media planning enterprises as Publicis' Starcom MediaVest and ZenithOptimedia.

83 SCHLUMBERGER

HOUSTON

2009 U.S. BOOKED AIR VOLUME: \$35 MILLION
COMPANYWIDE BOOKED AIR VOLUME: \$180 MILLION
COMPANYWIDE T&E: \$360 MILLION
PREFERRED VENDORS: AIR FRANCE, CONTINENTAL, EMIRATES; HERTZ, NATIONAL, ENTERPRISE; GETTHERE; CONCUR
CONSOLIDATED U.S. AGENCY: BCD TRAVEL

Oil field services supplier Schlumberger last year shaved about 22 percent from its 2008 U.S. booked air volume.

The company this year has been further restricting 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 uses a GetThere online booking tool in the United States, Canada, France, Germany, the Netherlands, the United Kingdom and Australia and this year is launching the tool in Singapore. Online booking adoption rates are about 75 percent in North America and range from about 20 percent in France to 55 percent in the Netherlands and 60 percent in Australia.

BCD Travel is Schlumberger's consolidated agency in the United States and Canada. Elsewhere, the company also uses American Express, HRG Worldwide, Carlson Wagonlit Travel and FCm Travel Solutions.

84 WALMART

BENTONVILLE, ARK.

2009 U.S. BOOKED AIR VOLUME: \$34.1 MILLION
COMPANYWIDE BOOKED AIR VOLUME: \$47.2 MILLION
PREFERRED VENDORS: AMERICAN, DELTA, CONTINENTAL, CATHAY PACIFIC, JAPAN AIRLINES; LA QUINTA, CHOICE, BEST WESTERN; AVIS, NATIONAL, ENTERPRISE; GETTHERE; APTRICITY
CONSOLIDATED U.S. AGENCY: WAL-MART STORES INC. CORPORATE TRAVEL DEPARTMENT

Retail giant Walmart, with more than \$405 billion in sales in fiscal 2010, saw its U.S. booked air volume slip from just shy of \$50 million in 2008 to \$34.1 million in 2009.

The company's travelers use a Citibank corporate MasterCard, and Walmart also employs the Universal Air Travel Plan payment account for air purchases. Walmart last year pioneered the automated central billing of hotel payment with UATP, issuer American Airlines and preferred hotel supplier La Quinta. The company is eyeing further expansion of the program.

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 BCD and American Express.

85 BRISTOL-MYERS SQUIBB

NEW YORK

2009 U.S. BOOKED AIR VOLUME: \$33.4 MILLION
COMPANYWIDE BOOKED AIR VOLUME: \$84 MILLION
U.S. T&E: \$128.3 MILLION
COMPANYWIDE T&E: \$208.6 MILLION
PREFERRED VENDORS: CONTINENTAL, AMERICAN, DELTA, AIR FRANCE; MARRIOTT, HILTON, STARWOOD; AVIS, HERTZ, BUDGET; CWT HORIZON, KDS; IBM, CONCUR
CONSOLIDATED GLOBAL AGENCY: CARLSON WAGONLIT TRAVEL

Pharmaceutical manufacturer Bristol-Myers Squibb cut nearly \$10 million off its U.S. booked air volume in 2009.

As with much of the pharmaceutical industry, BMS had a busy 2009 with regards to mergers and acquisitions. The company in September 2009 completed a \$2.4 billion acquisition of biotechnology firm Medarex and in July 2009 sold its branded generics business in the Middle East to GlaxoSmithKline for \$23.2 million.

BMS reported improved compliance to both its air and hotel program in 2009. About 77 percent of U.S. booked air travel went through its preferred booking channel, Carlson Wagonlit Travel's Horizon online booking tool.

This year, BMS is implementing its global agency, CWT, for both travel and meetings and aims to better leverage meetings and transient travel spending. The company also is looking to lower the cost threshold for required registration of its meetings for tracking purposes.

American Express issues corporate cards for BMS travelers.

86 BAYER AG

LEVERKUSEN, GERMANY

2009 U.S. BOOKED AIR VOLUME: \$33.1 MILLION
COMPANYWIDE BOOKED AIR VOLUME: \$126.6 MILLION
U.S. T&E: \$95.3 MILLION
PREFERRED VENDORS: LUFTHANSA, CONTINENTAL, DELTA; MARRIOTT, HILTON, INTERCONTINENTAL; NATIONAL, ENTERPRISE; CLIQBOOK; CONCUR
CONSOLIDATED U.S. AGENCY: BCD TRAVEL

Pharmaceutical and agricultural product manufacturer Bayer reduced travel spending by 20 percent in 2009 compared with 2008, including a 23 percent reduction in its U.S. booked air volume.

Bayer in 2009 sought to increase compliance with its travel policies through improved reporting, and this year aims to boost accuracy and timeliness of reporting on its global travel spending levels.

Bayer is aligning all of its local travel policies under a single global policy guideline.

BCD Travel acts as Bayer's consolidated agency in the United States and, alongside Carlson Wagonlit Travel, also manages the company's needs globally. U.S. Bank issues corporate cards on the MasterCard platform for Bayer's U.S. travelers.

87 DOW CHEMICAL

MIDLAND, MICH.

2009 U.S. BOOKED AIR VOLUME: \$32.1 MILLION
COMPANYWIDE BOOKED AIR VOLUME: \$58 MILLION
PREFERRED VENDORS: DELTA, AIR FRANCE-KLM, JAPAN AIRLINES, EMIRATES, AIR CANADA; AVIS; CLIQBOOK
CONSOLIDATED U.S. AGENCY: BCD TRAVEL

Dow Chemical last year decreased its U.S. booked air volume from \$44 million in 2008 to \$32.1 million, thanks in part to new policies and heightened compliance efforts.

The Midland, Mich.-based company last year implemented an economy class policy for all transatlantic travel as well as flights to South America. The company mandated use of its Cliqbook booking system for simple domestic and transcontinental reservations in the United States, while also mandating hotel bookings be made through designated travel management companies.

BCD Travel handles the company's U.S. travel, while HRG, Carlson Wagonlit Travel and American Express provide travel management services outside of the United States. The company's travel department has its sights set on consolidating its worldwide agencies.

88 3M

ST. PAUL, MINN.

2009 U.S. BOOKED AIR VOLUME: \$32 MILLION
COMPANYWIDE BOOKED AIR VOLUME: \$50 MILLION
U.S. T&E: \$94 MILLION
COMPANYWIDE T&E: \$180 MILLION
PREFERRED VENDORS: DELTA, AMERICAN, UNITED; HILTON, INTERCONTINENTAL, MARRIOTT; NATIONAL, ENTERPRISE; GETTHERE, AMADEUS E-TRAVEL; ORACLE PEOPLESOFT
CONSOLIDATED U.S. AGENCY: CARLSON WAGONLIT TRAVEL

Manufacturing conglomerate 3M cut costs through increased monitoring of traveler behavior last year, as the company's U.S. booked air volume levels dropped by \$12 million, or more than 27 percent, compared with 2008 levels.

3M in 2008 installed a travel dashboard to study traveler choices and in 2009 used that dashboard to gain management support for optimizing traveler behavior.

3M also is continuing its measurement of supplier effectiveness and client satisfaction.

Additionally, 3M completed a requests-for-proposals process for a global airline program last year and is implementing that program this year.

About 84 percent of U.S. air transactions went through the GetThere booking tool in 2009. Elsewhere, travelers book through the Amadeus E-Travel tool. Citi issues corporate cards for 3M U.S. travelers.

U.S. travel management services are consolidated under Carlson Wagonlit Travel. BCD and American Express manage some travelers outside of the United States, alongside CWT.

89 AECOM TECHNOLOGY CORP.

LOS ANGELES

2009 U.S. BOOKED AIR VOLUME: \$31.4 MILLION

PREFERRED VENDORS: UNITED, AIR CANADA, LUFTHANSA, CONTINENTAL, DELTA, AIR FRANCE-KLM; AVIS, NATIONAL

CONSOLIDATED U.S. AGENCY: CARLSON WAGONLIT TRAVEL

AECOM increased its U.S. booked air spending last year to \$31.4 million with the completion of four strategic acquisitions, including LAN Engineering and SSI Services, which grew sales revenue to \$6.1 billion from \$5.2 billion and brought headcount to 43,200.

As its acronymic name suggests, AECOM is focused on providing architecture, engineering, consulting, operations and maintenance services to governments and private industry in more than 100 countries. Public funding accounted for 71 percent of global revenue last year.

American Express is AECOM's consolidated card program provider.

The AECOM global travel department started a global agency and card consolidation effective Jan. 1, 2010, which it anticipates will cover 80 percent of global travel spending by the end of 2011.

89 NIKE

BEAVERTON, ORE.

2009 U.S. BOOKED AIR VOLUME: \$31.4 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$49.6 MILLION

CONSOLIDATED GLOBAL AGENCY: BTI

Footwear and apparel manufacturer Nike has a distinct global bent to its corporate travel, with 65 percent of its U.S. air bookings involving international destinations, and in 2009 added 35 countries to its consolidated travel management program, bringing 98 percent of its worldwide travel spending under its auspices. Travel still is handled by BTI, a former joint venture between BCD Travel and HRG Worldwide that serves only existing clients. Nike plans to envelop more countries in the program in 2010.

Nike's travel management philosophy remains high-touch. It has a dedicated onsite facility at its Oregon headquarters, where the company last year introduced a new virtual-hold telephone system, which leaves messages and allows agents to flatten demand peaks and valleys.

The company slashed its U.S. booked air volume in 2009 by more than 40 percent from its 2008 level.

91 KOCH INDUSTRIES

WICHITA, KAN.

2009 U.S. BOOKED AIR VOLUME: \$31 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$41 MILLION

PREFERRED VENDORS: CLIQBOOK, AMADEUS E-TRAVEL

CONSOLIDATED U.S. AGENCY: BCD TRAVEL

Privately owned chemical, refining and energy conglomerate Koch Industries Inc. generated \$100 billion in revenue in 2009. Koch has a presence in nearly 60 countries and about 70,000 employees.

The Koch companies consolidated travel management services with BCD Travel in 27 countries throughout the Americas and Europe. Koch utilizes Cliqbook in North America and Amadeus E-Travel in certain European countries.

Advito provides air and hotel consulting services to assist Koch in leveraging their global spend.

92 KRAFT FOODS

NORTHFIELD, ILL.

2009 U.S. BOOKED AIR VOLUME: \$30.9 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$75.5 MILLION

COMPANYWIDE T&E: \$103.2 MILLION

PREFERRED VENDORS: UNITED, AMERICAN, DELTA; HILTON, MARRIOTT, STARWOOD; NATIONAL, ENTERPRISE, HERTZ

CONSOLIDATED U.S. AGENCY: AMERICAN EXPRESS

Kraft's U.S. booked air volume last year fell to \$30.9 million from \$44 million in 2008. In February 2010, Cadbury became part of the company. The travel department this year is working to integrate Kraft and Cadbury travel programs globally.

The company's primary U.S. agency last year was American Express, but Kraft and Cadbury are transitioning to BCD Travel globally.

Last year, American Express, Carlson Wagonlit Travel and some regional agencies were among preferred travel management companies elsewhere.

The company is transitioning its booking tool from Amadeus E-Travel to Concur's Cliqbook in North America.

The company this year also is developing a new interactive global travel intranet site, while working to integrate its travel booking and expense reporting systems. U.S.-based Kraft travelers carry the American Express corporate card and file expenses using IBM's tool.

93 AON

CHICAGO

2009 U.S. BOOKED AIR VOLUME: \$30.1 MILLION

PREFERRED VENDORS: UNITED, SOUTHWEST; AVIS

CONSOLIDATED U.S. AGENCY: CARLSON WAGONLIT TRAVEL

In 2009, Aon reduced its U.S. booked air spending to \$30.1 million, while its sales revenue stayed steady at \$7.6 billion from the year before and headcount was relatively unchanged at 36,200 employees.

Travel volume reductions came in part through greater use of CWT's Horizon online booking tool, which is now required for all simple domestic trips.

One of the world's leading insurance brokerages, as well as a top reinsurance broker, Aon operates out of more than 500 offices in more than 120 countries.

94 DUPONT

WILMINGTON, DEL.

2009 U.S. BOOKED AIR VOLUME: \$30 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$55 MILLION

U.S. T&E: \$90 MILLION

COMPANYWIDE T&E: \$171 MILLION

PREFERRED VENDORS: UNITED, US AIRWAYS, LUFTHANSA; MARRIOTT, CROWNE PLAZA, INTERCONTINENTAL; NATIONAL, ENTERPRISE; CLIQBOOK; CONCUR

CONSOLIDATED U.S. AGENCY: BCD TRAVEL

Chemical manufacturer DuPont's travel team last year saw its U.S. booked air volume cut in half to \$30 million from 2008, thanks to aggressive demand management techniques, stricter mandates on policy and enhanced supplier compliance efforts.

It also launched a new meetings policy in Europe, the Middle East and Africa. The company last year implemented a global videoconferencing policy to steer some trips into the virtual realm.

About 60 percent of the company's air transactions booked in the United States last year were reserved through the Cliqbook booking tool from Concur, which also furnishes DuPont's preferred expense reporting platform for U.S. travelers. The company's travelers use the American Express corporate card for travel expenses.

BTI provides international travel management services, with BCD Travel serving North America and HRG serving most other locations.

94 INTEL

SANTA CLARA, CALIF.

2009 U.S. BOOKED AIR VOLUME: \$30 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$52 MILLION

U.S. T&E: \$102 MILLION

COMPANYWIDE T&E: \$175 MILLION

CONSOLIDATED U.S. AGENCY: AMERICAN EXPRESS

The world's largest semiconductor manufacturer, like many companies, significantly slashed travel spending in 2009, cutting its 2008 U.S. booked air volume by more than half. Intel, however, did so in part through an atypical mechanism: allowing its travelers to find and book lower airfares on the Internet.

Intel in 2008 conducted a three-month trial into the financial impact of its travelers' online travel search activity, and determined that travelers who booked independently paid 30 percent more for hotels and 50 percent more for car rentals, but 10 percent less for domestic airfares. It followed up on that finding in 2009, reimbursing travelers who find and book lower domestic airfares. This year, Intel is evaluating the financial sense of allowing similar web bookings for international flights, which make up about two-thirds of its U.S.-booked travel volume.

The company has pushed videoconferencing as a mechanism to not only reduce spending but to ward off a full return to pre-recession travel behavior and spending levels.

96 ALCATEL-LUCENT

PARIS

2009 U.S. BOOKED AIR VOLUME: \$29.5 MILLION

PREFERRED VENDORS: AVIS

CONSOLIDATED U.S. AGENCY: CARLSON WAGONLIT TRAVEL

In 2009, the Paris-based supplier of high-tech equipment for telecommunications networks reduced its 2009 U.S. booked air volume to \$29.5 million, as its sales revenue dropped from \$24 billion in 2008 to \$21.7 billion in 2009.

Alcatel-Lucent had 78,373 employees working in 130 countries, with 6,800 working in the United States. U.S. employees were urged to book all simple trips using the Book My Trip self-booking tool and to search for the lowest logical airfare.

The company in its annual report said it reduced costs last year through "much stricter cost control and more effective internal process management."

It also claimed, "Bold initiatives were launched throughout 2009 to drastically reduce the company's carbon footprint and to enable customers to achieve energy efficiencies through innovative technologies and solutions. Particular attention was paid to ensure that all employees understand and embrace the strategic importance of environmental and other Corporate Social Responsibility imperatives."

In 2009, it also "reinforced implementation of numerous measures to meet its goal of reducing CO₂ emissions from operations by 50 percent, as compared to 2008, by 2020."

97 JACOBS ENGINEERING

PASADENA, CALIF.

2009 U.S. BOOKED AIR VOLUME: \$28.7 MILLION

PREFERRED VENDORS: AMERICAN, DELTA, CONTINENTAL; HERTZ, NATIONAL, ENTERPRISE; CONCUR

CONSOLIDATED U.S. AGENCY: BCD TRAVEL

Jacobs Engineering Group held its U.S. booked air volume to \$28.7 million in 2009 even as it increased its sales revenue to \$11.5 billion from \$11.2 billion in 2008.

Also down slightly was the number of employees, which reached 38,900 working at more than 160 offices around the world, primarily in North America, Europe, Asia and Australia.

Jacobs travelers use the American Express card.

In 2009, Jacobs raised its Cliqbook online booking tool adoption to 21 percent from 6 percent in 2008. This year, it is up to 30 percent.

Even as the company grew, travel costs held steady at the company last year because of its focus on cutting selling, general and administrative expenses.

As the company said in its annual report, "We took more than \$150 million of SG&A expense out of our business. Taking cost out of our business was a vital part of dealing with difficult market conditions, and one we addressed well."

Another reason is the company's growing focus on the environment. Not only did it create the Carbon Calculator tool at the request of the U.K. Environmental Agency, but it also began testing green travel plans in 16 of its large U.K. offices.

The company defined a green travel plan as "a package of measures and incentives designed to allow the travel needs of site users to be understood and managed in a more sustainable and environmentally friendly manner. If these plans prove effective over the course of the next year, similar programs and plans may be created for additional offices worldwide."

98

KBR

HOUSTON

2009 U.S. BOOKED AIR VOLUME: \$28.1 MILLION

PREFERRED VENDORS: CONTINENTAL, DELTA, US AIRWAYS; HILTON, CROWNE PLAZA, HOLIDAY INN; AVIS, ENTERPRISE; AMERICAN EXPRESS; AXO

CONSOLIDATED U.S. AGENCY: AMERICAN EXPRESS

Global engineering, construction and services company KBR in 2009 reduced its U.S. booked air volume, according to *BTN* estimates, by nearly \$12 million from 2008, when it spent \$40 million. KBR achieved much of those reductions through continued use of strategies it implemented in 2008 and 2009 to generate program savings, including reducing non-project-related travel.

The company, which is the largest U.S. Army contractor and a top-10 contractor for the U.S. Department of Defense, continued to focus on enhancing traveler security last year through its traveler tracking capabilities and airline and aircraft safety rating criteria. American Express is the company's U.S. travel management company. Persian Gulf travel agencies Kanoo Travel and Orient Travel handle a significant portion of KBR's non-U.S. travel volume. U.K.-based ATP International also handles some reservations abroad.

International trips made up 80 percent of the company's travel footprint. AXO is the preferred online booking tool domestically and GetThere is used in some of KBR's international locations.

99

AMGEN

THOUSAND OAKS, CALIF.

2009 U.S. BOOKED AIR VOLUME: \$28 MILLION

PREFERRED VENDORS: UNITED, DELTA; MARRIOTT, HYATT; HERTZ; CLIQBOOK

CONSOLIDATED GLOBAL AGENCY: CARLSON WAGONLIT TRAVEL

Biotechnology firm Amgen last year reduced its U.S. booked air spending by far more than 35 percent from \$46 million in 2008.

In 2009, the company implemented an outsourced global travel management model, operated by Carlson Wagonlit Travel, employing key metrics and service level agreements.

Also last year, the company developed a new global travel policy,

which made a huge difference in its efforts to tighten controls for travel expenses. Those efforts were aided in part by a new automated expense management system.

Fifty-five percent of Amgen's U.S. bookings last year were made through the company-approved online booking tool, Cliqbook. Outside of the United States, the company uses the Amadeus E-Travel system for online bookings. Amgen's travelers carry the American Express card to pay for travel expenses.

Amgen also has been a leader in strategic meetings management, driving its preferred technology supplier, StarCite, to reconfigure systems to standardize input across business units and enhance reporting on all of the company's group spend.

The company last year was able to leverage its meetings data for group and transient hotel deals.

This year, it extended access to its online booking tool to non-staff and drove the use of its travel management company for booking meetings globally.

99

FIDELITY INVESTMENTS

BOSTON

2009 U.S. BOOKED AIR VOLUME: \$28 MILLION

COMPANYWIDE BOOKED AIR VOLUME: \$32 MILLION

U.S. T&E: \$90 MILLION

COMPANYWIDE T&E: \$110 MILLION

PREFERRED VENDORS: DELTA, AMERICAN, BRITISH AIRWAYS; MARRIOTT, HILTON, SHERATON; HERTZ, NATIONAL; ORBITZ FOR BUSINESS; ARIBA

CONSOLIDATED U.S. AGENCY: NONE, BCD TRAVEL IS PRIMARY

Fidelity Investments slashed its U.S. booked air volume nearly in half in 2009 compared with 2008, as the company seeks to consolidate and globalize its preferred suppliers.

The company, one of the world's largest managers of mutual funds, this year is undergoing preferred supplier consolidations and a globalization of its airline programs with international business units.

Fidelity also is devising scorecards for its business units and reporting, communication and marketing tools for the corporate travel program and policy.

In 2009, Fidelity completed a requests-for-proposals process and subsequent implementation of a corporate card program. U.S. travelers now use cards issued by American Express, and the company has cards issued by Citi and JPMorgan outside the United States.

The company also updated its policy last year to push further usage of nonrefundable tickets, tighten up its business class travel requirements and provide hotel city guidelines.

Fidelity is building awareness of travel spending to its business units through reports and scorecards and also has added the management routine of an annual review.

BCD Travel handles about 60 percent of Fidelity's U.S. travel needs. BCD, along with Orbitz for Business, also handles international travelers.

Travelers also book through Orbitz for Business, and Fidelity reported that about 80 percent of its U.S. airline bookings were made through the tool in 2009. About 90 percent of U.S. air bookings were made without agent intervention. ■