

PhoCusWright and Travel Tech Consulting's

# Corporate Travel Technology

## *Today and Tomorrow*

A comprehensive analysis and forecast of emerging corporate travel trends for the near future.

By Norman L. Rose

**TravelTech Consulting, Inc.**

 **PhoCusWright**  
MARKET RESEARCH • INDUSTRY INTELLIGENCE



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# Corporate Travel Technology Today and Tomorrow

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Published by  
Travel Tech Consulting, Inc. and PhoCusWright Inc.

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### Corporate Travel Technology

#### Today and Tomorrow

Contents		Table Listings	
<b>Executive Summary</b>	<b>1</b>	<b>Table 1.1</b>	<b>3</b>
		Trends in Emerging Technologies	
<b>Introduction</b>	<b>3</b>	<b>Table 1.2</b>	<b>4</b>
		The Standardization of Fare Matrixes	
<b>Macro Technology Trends</b>	<b>7</b>	<b>Table 1.3</b>	<b>4</b>
		Corporate Travel Paradigm Shifts	
<b>Macro Corporate Travel Technology Trends</b>	<b>9</b>	<b>Table 3.1</b>	<b>10</b>
		Horizontal vs. Vertical Integration	
<b>Corporate Self-Booking Technology</b>	<b>13</b>	<b>Table 4.1</b>	<b>13</b>
		Online Penetration of U.S. Corporate Travel Market, Gross Bookings, 2004-2008 (US\$B)	
<b>Mid-Office Technology</b>	<b>17</b>	<b>Table 4.2</b>	<b>14</b>
		Self-Booking Productivity Tools	
<b>Business Intelligence</b>	<b>19</b>	<b>Table 4.3</b>	<b>14</b>
		Standard Features of Self-Booking Productivity Tools	
<b>Travel Management Companies</b>	<b>23</b>	<b>Table 4.4</b>	<b>14</b>
		Unique Features of Self-Booking Productivity Tools	
<b>ROI of Travel Management</b>	<b>25</b>		
<b>Vendor Profiles</b>	<b>27</b>		
		<b>Table 4.5</b>	<b>15</b>
		Emerging Features of Self-Booking Productivity Tools	
		<b>Table 5.1</b>	<b>17</b>
		Mid-Office Differences: Europe vs. U.S.	
		<b>Table 6.1</b>	<b>20</b>
		Ad Hoc Reporting Flexibility	
		<b>Table 8.1</b>	<b>26</b>
		Typical Travel Management Costs	





# Corporate Travel Today and Tomorrow

## Executive Summary

Technology is driving changes in the way business travel is booked and managed. As the mainstream market embraces techniques such as self-booking and interactive dashboards, emerging technology under the broad umbrella of Web 2.0 promises to integrate user-generated content and transform interfaces to become more user-centric. The following are some key findings from this report:

- Corporate travel technology follows trends in online and enterprise computing.
- The role of the corporate travel manager is changing with the increased influence of purchasing.
- Macro technology trends such as service oriented architectures and the Long Tail concept are already having an impact on the way corporate travel software is built and how it functions.
- Emerging technology drives unique functionality, which soon becomes standard within each product category.
- Self-booking tools are expanding both horizontally and vertically. From a horizontal perspective, corporate online booking tools are adding additional services such as meeting planning and restaurant booking and management. Vertical expansion includes expense report integration and improved interaction with enterprise computing systems.
- Mid-office technology plays a critical role in achieving touchless reservations.
- Traditional reporting is changing, bringing near real-time information to a variety of corporate stakeholders highlighting specific opportunities for additional savings.
- The consumer, including the business traveler, will continue to demand better and more personalized information to make the right travel purchase that fits their corporate policy and personal preferences.





## Section 1

# Introduction

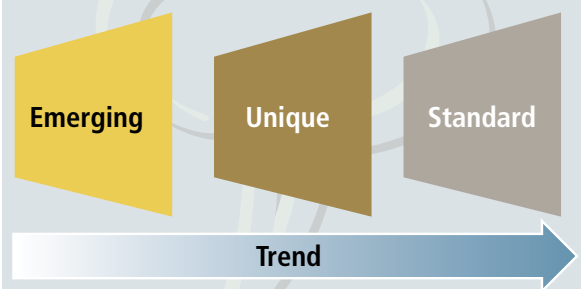
## Overview

Technology drives market changes. As each wave of innovation reverberates throughout an industry, new business practices emerge. The corporate travel industry is no exception. As travel companies embrace Travel 2.0, 3.0 and beyond, the pace of change is likely to accelerate. At the same time, all segments of the industry are under pressure to reduce costs and drive greater efficiencies. It is within this context that Travel Tech Consulting and PhoCusWright examine corporate travel technologies today and tomorrow.

Online travel is one of the largest and most successful e-commerce categories. Upon closer examination, it is apparent that innovation in the online travel space reflects macro-technology trends impacting all industries. For example, the use of rich Internet applications first appeared in other industries and is just emerging in the consumer online travel space. Unfortunately, corporate travel traditionally lags behind the consumer segment, delaying the impact of new technologies on business travel services.

Travel buyers often use a checklist of features to evaluate vendors. While understanding the capabilities of a vendor is a natural part of the

**Table 1.1**  
**Trends in Emerging Technologies**



Source: PhoCusWright Inc.

selection process, the static nature of the checklist approach often misses shifts in technology direction and corporate roles (see Table 1.1).

In fact, the single greatest influence on corporate travel technology is consumer online travel. This may sound like an obvious statement, but it is often overlooked in the evaluation process. A common example of this influence is the use of a pricing grid in corporate online self-booking tools. Pricing grids were pioneered by Orbitz and now are common at all major online travel agencies (see Table 1.2). Today, any corporate self-booking vendor that still uses a linear approach to fare quoting (i.e., line-by-line prices without a matrix summary)

**Table 1.2**  
**The Standardization of Fare Matrixes**

The image shows three overlapping screenshots of flight search results for the route San Francisco, CA (SFO) to Boston, MA (BOS). The top screenshot is from Orbitz, showing a grid of flight options with columns for 'Nonstop', '1 stop', and '2+ stops', and rows for various airlines like Delta, United, and American. The middle screenshot is from Travelocity, showing a similar grid with columns for 'Nonstop', '1 stop', and '2+ stops', and rows for airlines like Delta, United, and American. The bottom screenshot is from Expedia.com, showing a grid with columns for 'Nonstop', '1 stop', and '2+ stops', and rows for airlines like Delta, United, and American. The screenshots illustrate the standardization of fare matrixes across different travel technology providers.

Source: PhoCusWright Inc.

misses an important and expected feature.

The role of travel management is also changing due to the growing influence of corporate procurement. This shift is impacting the way suppliers are selected, measured and implemented (see Table 1.3). Procurement professionals look at travel as a commodity and often demand more detailed metrics on vendor performance. Procurement also is not opposed to outsourcing functions not core to the enterprise.

**Table 1.3**  
**Corporate Travel Paradigm Shifts**

OLD	➔	NEW
Transaction fees	➔	Travel Spend
Travel Management	➔	Travel Procurement
Intermediated Distribution	➔	Direct Distribution
Discounts	➔	Program Optimization
Policy Development and Mandates	➔	Policy Utilization
Online Adoption Rate	➔	Attachment Rate

Source: PhoCusWright's Corporate Travel Distribution, Key Markets

## Purpose of Report

The primary purpose of this report is to educate the reader on the major trends in corporate travel technology. This study provides detail into specific features and functionality within various corporate travel technology categories. The information contained in this study was derived from comprehensive interviews with over 20 travel software vendors, travel management companies (TMCs), as well as of hundreds of corporate travel managers and buyers in 2006 and 2007.

This research report reviews functionality for the major vendor categories, but does not equate specific features with vendors. Instead, the study discusses emerging, unique and standard features within each category. By adopting this approach, the reader can use this study as a reference for evaluating suppliers, recognizing that any given feature that is emerging or unique to a limited number of suppliers will shortly become standard.

## Industry Terms and Abbreviations

**GLOBAL DISTRIBUTION SYSTEM (GDS):** Includes Sabre, Galileo (Travelport), Worldspan (recently acquired by Travelport) and Amadeus. These reservation systems store air, hotel and car content from all major suppliers worldwide and have traditionally acted as the backbone for online and offline booking capabilities.

**CHARGE CARD DATA- LEVELS:**  
**LEVEL-3 CHARGE CARD DATA:** Full line-item detail which provides the same information found on an employee's receipt or travel itinerary. Level-3 data answers the "who," "what," and "where" questions for a corporation's finance and control systems.

**TRAVEL MANAGEMENT COMPANY (TMC):** A corporate travel agency that manages travel expenses for its corporate clients, as well as processes transactions.

**PNR: PASSENGER NAME RECORD:** A file on a [GDS](#) containing all the information relating to a specific booking.

**SOA:** Service Oriented Architecture is a more flexible way to create software using Web Services to exchange data. Rather than creating tightly coupled code that bonds specific functionality within the application, software written using SOA creates loosely coupled components that can easily be removed or altered without impacting the entire application.

**ITMC:** Internet Travel Management Companies - The dedicated corporate travel service divisions offered by the major online travel agencies.



## Section 2

# Macro Technology Trends

### Overview

The phrase “Web 2.0” has now permanently entered the global IT lexicon. Most pundits refer to Web 2.0 as the democratization of the Web, where user-generated content plays an increasingly important role. The user-centric nature of Web 2.0 is also represented by the adoption of new techniques to bring greater interactivity to the browser experience.

With *Time* magazine naming “YOU” as the person of the year in 2006, user-generated content became a mainstream trend. Whether it is user-generated videos on YouTube, or product ratings on Price Grabber, user input has permanently been infused into the online experience. In the online travel world, user-generated content has been promoted in two primary ways: travel blogs and ratings. TripAdvisor and IGOUGO are two classic examples of user-generated rating systems. Sites such as Realtravel.com, Gusto and Yahoo! Travel provide a forum for consumers to share their trip itineraries and benefit from collective wisdom.

Another aspect of Web 2.0 is an improved user experience, often referred to as rich Internet applications (RIAs). This trend simplifies user interactions by generally deploying two browser-based techniques to bring desktop functionality to the Web. Asynchronous JavaScript and XML (AJAX) is a development

technique for creating interactive Web applications. AJAX first came to consumer awareness with the introduction of Google Maps, which allow the user to point and drag the map to see different views without the need to refresh the Web page. A different RIA technique uses Adobe’s FLEX platform to deliver a Flash-based interface into the browser. By using Flash, developers can provide a rich user interface that includes mouse over, slide bars (also found in AJAX applications) and animation to enhance the user experience.

### Service Oriented Architecture (SOA)

A great deal has been written in IT journals over the last four years about the topic of service oriented architectures (SOA). The concept refers to a more flexible way to create software using Web Services, which is a set of communication tools that use open standards (e.g., XML, SOAP) to exchange data. Rather than creating tightly coupled code that bonds specific functionality within the application, software written using SOA creates loosely coupled components that can easily be removed or altered without impacting the entire application.

Understanding the underlying architecture of a software application has always been a challenge in the vendor-selection process.

Often, software suppliers confuse the issue by stressing their use of Web Services, which has become the norm to connect to disparate sources of content. For example, a major hotel chain still uses a mainframe computer as its central reservation platform. The company has created a Web Services layer to aid in communication with property-based systems and external channel distributors. While a good use of Web Services, this approach does not reflect a service oriented architecture. If this chain wanted to do a complete revision of its rate structure, the antiquated mainframe approach would lead to a programming nightmare. In contrast, if this application was built using SOA, an overall rate revision would be less painful, implemented faster and would not disrupt other modules of the reservations process. Travel technology built using SOA principles provides greater flexibility and, thus, SOA is an important evaluation criterion.

## Web 3.0 and Beyond

Though there is already a great deal of buzz about Web 3.0 capabilities, the technology industry is still defining it. Web 3.0 should mean easier, cheaper and more pervasive applications.

Many are looking to the emergence of the Semantic Web to drive Web 3.0. Its vision was conceived by Tim Berners-Lee, the inventor of the World Wide Web. He refers to the Semantic Web as a Web of data that can be processed directly and indirectly by machines. Web pages written in traditional HTML lack a common structure to allow machine extraction techniques to understand a Web page. In addition to improved understanding of machine-to-machine communication, Web 3.0 will likely involve an increased level of personalization. Whether preferences are gathered explicitly through user-defined profiles or

implicitly based on online behavior, the Web 3.0 phenomenon should deliver more relevant information that better fits the user's personal requirements.

## The Long Tail

The phrase "Long Tail" was first coined by Chris Anderson in a 2004 *Wired* magazine article to describe certain business and economic models, such as those employed by Amazon.com or Netflix. The Long Tail disputes the common wisdom that 80% of a company's sales should come from 20% of its products or services. In other words, the Long Tail is about selling less of more. Enter e-commerce, and a retailing explosion occurred for sites such as Amazon.com for out-of-print publications, one-of-a-kind things and documentaries.

## The Impact on Corporate Travel Technology

These technology trends are already impacting the way corporate travel software is built and performs. User-generated content in the form of user ratings already is a critical part of the consumer booking process and is beginning to appear in corporate software. Corporate software built on service oriented architectures provides a more flexible way to add new services without the need to re-write the entire application. The Long Tail strategy is evident as vendors increase the number of on-demand services that can be reserved through their online booking platform.

## Section 3

# Macro Corporate Travel Technology Trends

### Overview

Innovations in corporate travel technology reflect macro business and technology trends. Whether it is the need to consolidate global data, expand purchasing control over a wider variety of services or simplify the booking and expense process, the common theme is greater control and an improved user experience.

Global consolidation of travel expenses has been a recurrent theme for many years. There are a variety of methods to consolidate travel, including a common payment method (e.g., charge card), a single global Travel Management Company (TMC) and/or a preferred global self-booking platform. Each of these approaches has merit, but the difficulty in successfully implementing these strategies should not be underestimated. The key drivers for global consolidation are information management and policy execution. To build a successful global travel management program, travel buyers need to leverage as much volume as possible to achieve corporate discounts.

In fact, implementing programs that overcome supplier hurdles is at the heart of effective global travel management. This may sound like a simple task, but in reality, consistently interpreting and executing global contracts continues to be a challenge for travel buyers. The first step in global consolidation is the

collection of travel management data from all offices. However, volume at some international locations may be relatively low compared to corporate offices. As a result, gaining cooperation from the local TMC, or even branch offices of mega-TMCs or consortiums, can be problematic.

### Horizontal Integration

Procurement is playing an increasing role in travel management. As a result, many buyers are expanding the types of services managed under the corporate travel umbrella. To meet the needs of more potential customers, vendors are including more travel-related activities, such as meetings management, parking and restaurant reservations in their applications.

Large corporate meetings and incentive travel have been managed effectively through existing technologies, but capturing and controlling small meeting expenses has been challenging as most meeting planning is done by executive administrators and internal meeting planners. There is no common tool to manage these processes internally. The introduction of meetings management modules is alleviating the problem, making site selection easier, integrating bookings into existing online travel applications and controlling all travel-related expenses associated with the meeting.

Embracing the Long Tail concept for corporate travel, some vendors are also expanding the types of services that can be booked through a single Web-based tool. Parking, restaurant reservations and event tickets are examples of services covered under this approach. Expanding service offerings meshes well with the increasing role of procurement in the travel management process. The decision to expand the number of services under management control is often driven by market realities that limit the cost-savings opportunities of traditional air, car and hotel spend. Airlines are increasing their rates and, thus, corporate discount programs based on percentage-off agreements are easily diluted as fares increase. By expanding booking control over additional spending areas, the corporation can recognize increased savings by controlling a wider variety of services.

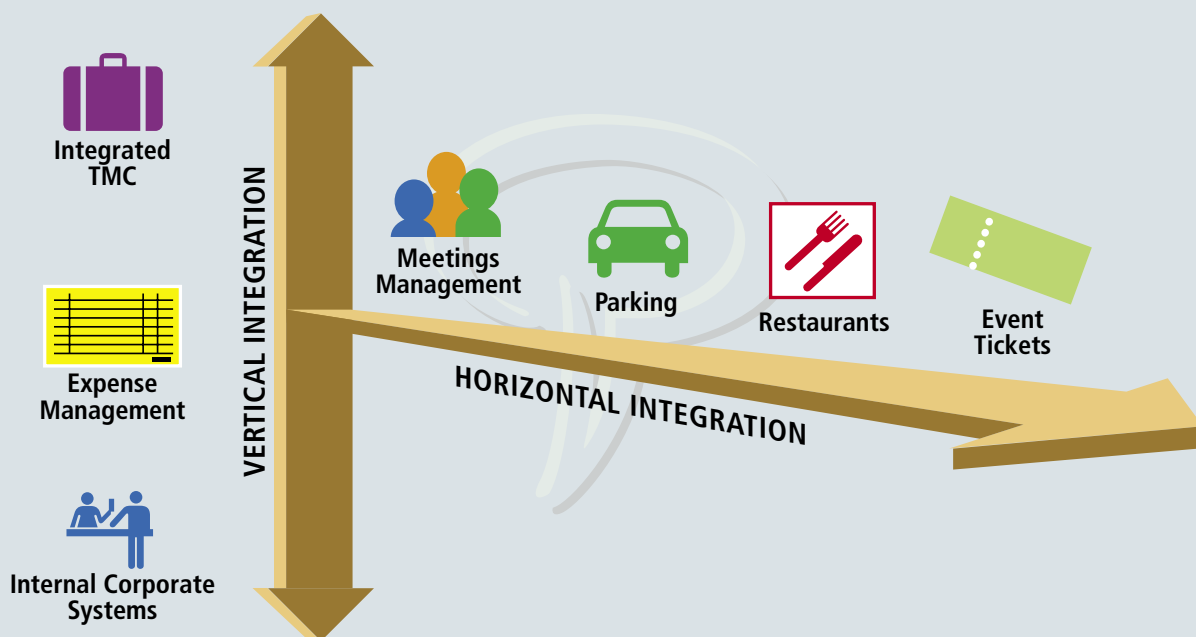
## Vertical Integration

Integrating self-booking within a TMC solution was introduced by Internet travel management companies (ITMCs) to allow corporate travel buyers to only work with a single contact and benefit from an integrated application. This approach has not been limited to ITMCs, as mega-TMCs and Super Regionals often act as resellers for self-booking applications, providing an integrated approach as well.

The effort to integrate expense management systems with online booking tools was introduced in the late 1990s. However, recent acquisitions of self-booking platforms by expense management vendors have created a renewed focus on self-booking and expense reporting integration. The goal of these applications is to simplify the creation of expense

**Table 3.1**

### Horizontal vs. Vertical Integration



Source: PhoCusWright Inc.



reports. New integration techniques include the automatic creation of expense reports from online booking itineraries, the capture of hotel folio information, pre-population of expense reports and identification of e-receipt and e-folio capabilities at the time of booking.

## Internal Corporate Systems

Enterprise Resource Planning (ERP) systems, such as Oracle or SAP, run the infrastructure for many corporations. Self-booking vendors such as Amadeus, Concur and GetThere interact in a number of ways with these types of systems, including accessing the human resources database to update traveler profiles or downloading expenses to an internal data warehouse. Some vendors offer tighter integration, in which the booking application is actually a module of the ERP solution. The trend towards horizontal or vertical integration is not mutually exclusive, as some vendors are pursuing both ends of the axis (see Table 3.1).

## Mobile Strategy

The corporate travel industry's flirtation with mobile technology is finally creating concrete applications. The most common is the use of text messaging (SMS) on mobile devices to view itinerary elements or notify travelers of changes in their itineraries. A common misconception about mobile application development is that it attempts to transfer desktop functionality to the cell phone. This often results in applications that are too cumbersome to use on mobile devices. To be successful, mobile applications should adhere to four broad objectives:

1. **POSITIONING.** With the adoption of A-GPS technology embedded in modern cell phones, corporate travel mobile initiatives should be

location sensitive. For example, services such as finding a restaurant or a FedEx/Kinkos need to be communicated based on the business traveler's knowledge of the location. Mobile technology can also play a role in tracking traveler location in the event of a security incident.

2. **PURPOSE.** Information based on the corporate traveler's particular situation can make the communication more relevant. If the traveler is looking for a quiet restaurant for a business dinner, corporate mobile applications should draw from both static content (e.g., Zagat's guides) and user-generated reviews to help the traveler identify the restaurants that fit their needs.
3. **PERSONALIZATION.** Mobile communication needs to be personalized, especially considering the vast amount of customer profile information in data warehouses. The travel industry could play a key role in driving more personalized location-based services.
4. **PERMISSION.** No frequent traveler wants to be inundated with unwanted messages or wireless spam. To avoid this scenario, corporate mobile information should only be delivered to users who have given their permission.



## Section 4

# Corporate Self-Booking Technology

### Overview

It was not long ago that business travelers relied solely on the expertise of their travel agents to book their reservations. These travel agents used computer technology from the 1960s, navigating an interface based on cryptic formats. The underlying process was hidden and inefficient. When corporate self-booking tools arrived on the market in the mid-1990s, they were hailed as a new way to automate the process and improve efficiency. As the adoption of these tools increased, tangible savings were realized through streamlining the booking process and achieving greater policy com-

pliance. Today, corporate self-booking applications have grown from an ancillary support tool to become the cornerstone of an effective travel management program. By the end of 2007, PhoCusWright projects that 42% of corporate travel dollars will be booked online in the U.S. (see Table 4.1).

Content aggregation is a major role for self-booking technology, including the need to integrate multiple GDSs, Low-Cost Carrier (LCC) content, rail, ferries and other fragmented inventory elements. Working with multiple GDSs is a common feature of all self-booking applications. It is important to distinguish between self-booking tools that provide a dedicated version for each GDS and true multi-sourced applications that incorporate information from multiple GDSs and other networks into a single display. A multi-sourced platform is more flexible to respond to market changes as new channels emerge for distribution of inventory.

LCCs have, in fact, had a major impact on corporate travel on a global level. The ability to add LCC content is a common feature among self-booking vendors, although differences exist in each tool's ability to book the LCC content and integrate into a master itinerary. In some cases, the GDSs have developed or licensed tools to extract Web content and integrate into existing records. Third party self-booking vendors often use aggregation

**Table 4.1**

### Online Penetration of U.S. Corporate Travel Market, Gross Bookings, 2004-2008 (US\$B)

Year	Total Corporate Travel	Online Corporate Travel	% Online Penetration
2004	\$85.9	\$24.0	27.9%
2005	\$93.7	\$29.5	31.5%
2006	\$98.9	\$36.3	36.7%
2007	\$101.9	\$42.8	42.0%
2008	\$105.1	\$50.1	47.7%

Source: PhoCusWright's Corporate Travel Distribution: Key Markets

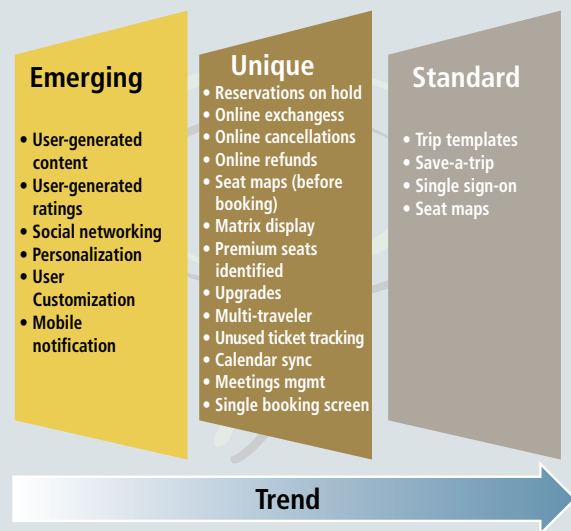
tools to accomplish this same goal. There also is a major effort underway by all the GDSs to bring LCCs into their platforms.

### Major Trends in Self-booking Technology

One of the main goals of self-booking technology is to improve the productivity of the frequent traveler or travel planner. To accomplish this goal, self-booking vendors have implemented a number of tools to accelerate the process. A relative parity of feature/functionality across vendors has emerged as self-booking suppliers strive to meet this competitive pressure. Productivity tools fall within three groups in terms of functionality – Standard, Unique and Emerging – (see Table 4.2). However, unique or emerging features do not necessarily represent sustainable advantages as each vendor strives to match its competitors.

Standard features are available from all vendors (see Table 4.3). Buyers should evaluate

**Table 4.2**  
**Self-Booking Productivity Tools**



Source: PhoCusWright Inc.

**Table 4.3**  
**Standard Features of Self-Booking Productivity Tools**

Features	Relevance
Trip Templates	Creates either an individual template or corporate template for destinations
Save a Trip	Allows the user to save a trip but does not hold inventory
Trip Cloning	Primarily used by travel administrators to recreate trips for multiple travelers
Single Sign-on	Integration with other corporate systems allows the user a single name and password to access multiple applications
Seat Maps	Allows the business to choose seats on various airlines

Source: PhoCusWright Inc.

**Table 4.4**  
**Unique Features of Self-Booking Productivity Tools**

Features	Relevance
Reservations on Hold	The ability to hold a booked reservation for a limited time period
Online Exchanges, Cancellations and Refunds	The ability to exchange tickets, cancel trips and process refunds as part of the tool
Seat Maps (before booking)	The ability to view seat maps prior to booking
Matrix Display	Presents fare responses in a grid format usually grouped by number of stops
Premium Seats and Upgrades	The ability to select either premium seats or to request an upgrade
Multi-traveler booking options	The ability for a travel planner to book multiple travelers on a single reservation
Unused ticket tracking and redemption	Provides an automated way to review unused tickets and redeem their value as part of the booking process
Calendar Sync	The ability to download itineraries to a calendar application such as Microsoft Outlook or Lotus Notes
Meetings Management	A meetings module that helps with site selection and the meeting reservation process
Single booking screen for air, car, and hotel	Provides the ability to book air, car and hotel on a single Web page

Source: PhoCusWright Inc.

the value of each of these productivity tools within the context of their company's requirements. Many self-booking vendors have unique features whose value will vary based on specific corporate requirements (see Table 4.4). Tools such as a matrix display, the ability to perform online exchanges, cancellations and refunds and the integration of unused ticket tracking into the booking process are quickly becoming standard functionality across vendors. These options can impact adoption and bottom-line savings.

Travel 2.0 technologies can also have a major impact on the productivity of the corporate self-booking process (see Table 4.5). A community of frequent travelers naturally exists within every company; interacting with this community can help validate vendor performance. Personalization and customization is a common process on the consumer Web and thus a natural evolution in the corporate travel self-booking process.

Corporate online booking tools clearly save the corporation money. Today, these tools are primarily used for simple point-to-point travel. But complexity is the next threshold of corporate self-booking adoption. Complex trips, particularly international itineraries with multiple cities and/or multiple continents, are difficult to automate. Rather than pushing these itineraries online, corporate buyers should embrace a hybrid approach to complex reservations.

From this perspective, the tools at the travel agent's desktop are critical. A hybrid approach to complex travel planning is only possible if the agent can access the planning already done online and complement or complete the process for the traveler. To accomplish this, TMC support centers must be able to collaborate with the online travel planner through online chat and tools that allow the call center agent to capture planning on the Web or even take control of the booking process.

**Table 4.5**

### Emerging Features of Self-Booking Productivity Tools

Features	Description	Relevance
User-generated content	Incorporates user's travel commentary and recommendations	Tapping the community of frequent travelers that exists at every corporation can improve communication and help better understand frequent travelers' requirements
User-generated ratings	Allowing corporate users to rate travel suppliers for internal sharing only	Internal rating systems can help travel buyers understand the value of negotiated vendor contracts
Social networking	The ability to connect with other travelers to coordinate or collaborate itinerary planning	Collaboration is a key part of Web 2.0 and allowing frequent travelers to collaborate on trip planning is a natural social networking application for corporate travel
Personalization	The ability to filter content based on user's personal preferences	Personalization can help ensure that an online tool is delivering services that correspond to a travelers preferences
User customization	The ability to alter booking path and content display based on user preferences	A "My Yahoo!" type of functionality allows the employee to view travel information that is relevant to their needs
Mobile notification	Proactive customer messaging that notifies travelers about changes to their itinerary delivered (mobile, SMS, email)	The ability to communicate with the "always connected" traveler can help automate support through mobile technology
Mash-ups	A new breed of Web-based applications that mixes at least two different services from disparate sources into a single integrated display	An integrated mash-up can provide multiple services within a single Web page, e.g., restaurant reservations through Open Table and Zagat reviews
Bi-directional calendar synchronization	The ability to synchronize calendar and travel plans	Travel planning starts with a calendar The ability to change an itinerary based on a calendar entry can simplify the process

Source: PhoCusWright Inc.



# Section 5

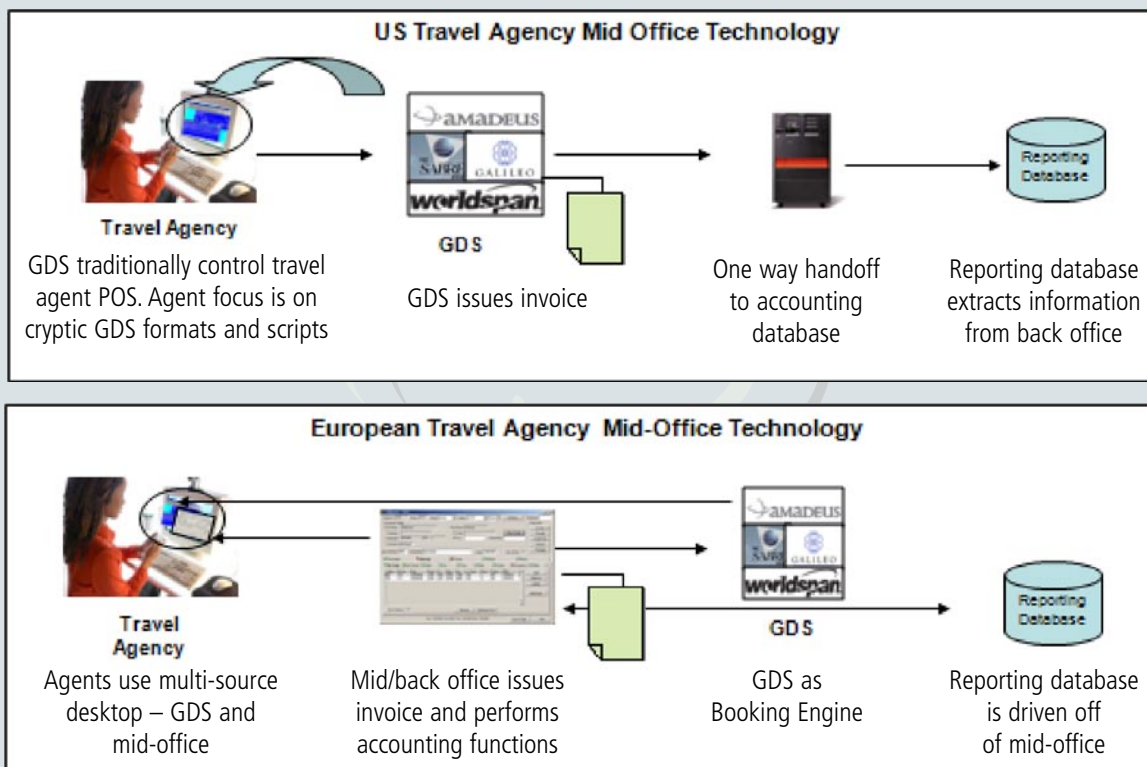
## Mid-Office Technology

### Overview

The concept of “touchless” reservations has been a hot topic in the corporate travel industry for many years. To achieve a true touchless transaction, mid-office quality control is essential. In the U.S., quality control generally involves two broad categories:

Passenger Name Record (PNR) integrity and automated services to check for better fares or seats. In markets outside the U.S., such as Europe, mid-office technology plays a more active role in accounting for transactions, as these applications often drive the invoice and, thus, contain accounting functionality (see Table 5.1).

**Table 5.1**  
**Mid-Office Differences: Europe vs. U.S.**



Source: PhoCusWright Inc.

Mid-office quality control software also plays a critical role in ensuring data integrity for reporting purposes. Because the GDS is still the primary reservation platform for corporate bookings, the PNR often includes various fields used for corporate reporting. User Definable Interface Data (UDID) are pieces of information attached to a booking for reporting purposes. Simply put, without the proper UDID entries, key data elements such as low-fare alternatives may not be captured and reported accurately. How mid-office software is deployed and customized to meet the needs of the TMC and, ultimately, the corporate customer varies across vendors.

### **The Service Bureau Concept**

Providing quality assurance via a service bureau is a common delivery structure. In this environment, a TMC subscribes to the service and works with the vendor to identify specific quality control steps required to meet its client's specific needs. This may include creating the routines needed to check PNR accuracy and developing the proprietary programming language and techniques to search for low fares.

Another major trend in mid-office quality control is the ability to create TMC-specific routines controlled by TMC personnel using quality assurance software in an application service provider (ASP) environment. TMCs have long been able to license mid-office quality assurance software and house it on machines within the agency. Vendors that offer their quality assurance application in an ASP model can easily update the software, providing new features to all subscribers. At the same time, the TMC retains control of routine creation, which is generally facilitated through an easy-to-use graphical user interface.

An emerging trend for quality assurance is the adoption of point-of-sale tools that check for accuracy at the time of booking. This requires the travel agent to correct errors before the reservation is complete and limits the auditing process to basic PNR integrity. As a result, it does not automatically check for lower fares or better seats. These applications can also be used to create selling messages to direct the travel agent to cross-sell or up-sell based on parameters set by agency management.

Because lower TMC pricing is based on the ability to drive touchless travel, corporate buyers need to be sensitive to the types of tools used by their TMC. Inaccurate quality control can impact the value of management reporting and plays a critical role in the information value chain.



## Section 6

# Business Intelligence

### Overview

Information has always been the lifeblood of travel management; without it, travel buyers can't track performance, identify gaps in policy compliance or prepare for vendor negotiations. A recurrent challenge is the distributed nature of travel information. TMC reports remain the foundation of most travel management programs, but the importance of charge card information, expense report data and supplier reports should not be overlooked. The following describes each type of information in more detail:

- **PRE-TRIP INFORMATION:** Generally refers to transactions that are booked (and sometimes ticketed) but not yet cleansed to reflect changes and refunds. Corporations depend on pre-trip information for two primary purposes: risk management and pre-trip policy monitoring. Risk management allows the corporation to monitor potential security issues, ranging from monitoring the number of executives on a single plane to providing a snapshot of travelers' locations in the event of an incident. TMCs either provide reports based on this information or have developed applications that graphically track traveler location on an interactive map. Pre-trip policy monitoring may involve either passive or active travel authorization highlighting policy

violations to the traveler's supervisor or corporate travel manager.

- **CHARGE CARD INFORMATION:** Represents actual expenses incurred and is an essential part of the travel management reporting process. The limitation on charge card information has always been a lack of summary level detail. Many charge card providers are now offering Level 3 data, which does provide more transaction detail, but capturing this data is often still dependent on the merchant's point-of-sale technology. The role of charge card data varies in different markets. For example, in Europe, where travel inventory is more highly fragmented (e.g., boutique hotels, rail, ferry), charge card data has assumed a more prominent role in travel management.
- **EXPENSE MANAGEMENT SYSTEMS:** When electronic expense reporting systems first appeared on the market in the early 1990s, their primary focus was on automating expense report creation, filing and reimbursement. Clear evidence has been collected that shows significant corporate savings achieved by automating the expense filing process. As these systems have matured, many corporations use their expense management system to better understand actual expenses incurred and feed their internal financial systems.

Expense management systems generally import charge card information and combine it with details entered by the traveler. An emerging trend is the collection of folio information from hotels to pre-populate the expense report to further reduce data entry requirements. Additional integration of booking with expenses will come to the market later in 2007. Features will include the identification of participating e-folio hotel suppliers during the booking process and the auto-generation of expense reports based on booking information.

- **SUPPLIER INFORMATION:** The majority of suppliers measure the success of corporate agreements using internal data that reflects actual usage. Over the last five to six years many airlines have contracted with third party travel information providers to integrate their lifted coupons against overall market share goals. Integrating supplier information into a common data warehouse allows the corporation to measure variances between ticketed, expensed and supplier usage data. The variances can be used to better under-

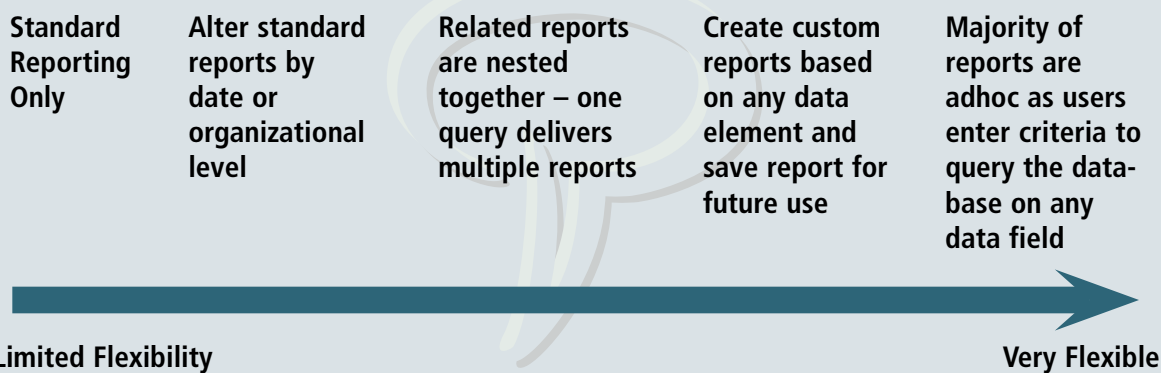
stand differences in data sources to isolate discrepancies for contract performance measurement.

Travel agency back-room accounting systems provide the primary source of TMC reporting. The accounting systems adjust the GDS PNR to account for changes, reissues and refunds. These applications can generate reports, but generally are not able to provide online reporting capabilities to the corporate user. To meet this need, TMCs have either created proprietary reporting applications or licensed third party tools that provide desktop or Web-based reporting to the corporate customer. These reporting applications provide a library of standard reports and the ability to create ad hoc reporting. The flexibility of the ad hoc reporting varies by vendor with some applications providing limited customization and others creating a robust data warehouse where most queries are ad hoc (see Table 6.1)

Evaluating TMC or third party reporting tools depends heavily on the way travel is managed within the company. Often the value of the reporting system depends on the sophistication of the travel manager or travel procurement

**Table 6.1**

**Ad Hoc Reporting Flexibility**



Source: PhoCusWright Inc.

buyer's knowledge of travel data and their willingness to create custom reports that address specific travel management issues.

## Emergence of Analytics and Dashboards

In many cases the reporting paradigm is being replaced by an interactive dashboard that is more flexible and can provide answers without the need to generate reports. It is important to emphasize that the move to implement interactive dashboards is not a corporate travel phenomenon, but an overall enterprise computing trend. Dashboard development reflects two realities of modern corporate life: the ever-increasing amount of information available and the time constraints that reflect the ultra-connected business environment. The ultimate goal of any dashboard initiative is to allow the user to find *the right information at the right time in the most efficient manner*.

Dashboards have become a critical tool for the execution of key enterprise initiatives. Many of the major TMCs and third party providers have already introduced interactive dashboards for travel management. These travel-specific dashboard products allow corporate users to review summary details, measure performance against contracted goals and drill down to individual division, department and traveler details with a simple click. Some of the dashboards include recommendations on how to achieve savings goals.

## Global Data Consolidation

A key need for any multinational company is the global consolidation of travel information. For years, many TMCs and third party vendors have offered services that integrate information from global sources. The ability to

implement a global data consolidation effort depends on the number and variety of TMCs used. Even when a corporation consolidates its travel globally with a single TMC, capturing consistent information from all locations may still be problematic. As a result, implementing a global consolidation strategy requires a blend of technology and services, especially when the goal is to aggregate data from affiliate or independent TMCs. Agency accounting systems are not typically standardized on a global basis and not all locations may capture point-of-sale information (e.g., lowest logical fare), which is critical for effective reporting. The combination of a robust technology platform and a service commitment to monitor and control data aggregation represents the best practices for global data consolidation.

Another trend gaining momentum is the distribution of travel management information to various stakeholders in the organization. The way information is distributed varies by vendor and corporate requirements ranging from PDF reports created specifically for a department head to granting access to a customized dashboard that only reflects a division's or department's details. Regardless of the methodology of distributing information, the trend toward pushing business intelligence to various corporate stakeholders clearly reflects the reality that travel is truly managed at the division or department level.

## Benchmarking

The need to benchmark a company's results has become more important as procurement's influence on travel management has increased. This is due to the fact that benchmarking has long been a favored metric for corporate performance measurement. Benchmarking falls into three broad categories:

- Internal benchmarking pitting one division against another measuring key performance indicators (KPIs);
- Benchmarking against external metrics (e.g., Runzheimer statistics); and
- Benchmarking against “like entities,” i.e., by size or industry.

Defining “like entities” can be difficult due to differences in corporate culture, route structure and level of self-booking adoption. However, travel management benchmarking is here to stay.

## Section 7

# Travel Management Companies

### Overview

Corporate travel agencies are called travel management companies (TMCs) for a reason. Current trends clearly show that TMCs are expanding their role as managers of travel expenses for their corporate clients rather than simply being transaction processors. In extreme cases, some companies have elected to replace their internal travel management staff with TMC personnel.

When online travel agencies entered the corporate travel market in 2002-2003, traditional TMCs were quick to criticize these competitors as unable to provide the same level of service as their brick-and-mortar counterparts. Five years later, the lines separating these two types of companies have nearly disappeared as ITMCs have grown to offer technology and services comparable to TMCs.

To improve their positioning, many TMCs are providing proactive advice for additional corporate savings opportunities. In an era where airline discounts have diminished, particularly for domestic U.S. travel, and hoteliers push for more dynamic rates, identifying areas of additional savings has become a critical role for the TMC.

In addition, TMCs of all sizes are adjusting their approach and services to reflect the increasing role of procurement in the travel

management process. Often procurement buyers have less travel industry knowledge and look to their TMCs to provide strategic advice on achieving additional savings. Travel procurement buyers demand a greater variety of metrics to measure such key performance indicators as contract performance, call center efficiency and online booking adoption. These types of TMC statistics are not new, but the added emphasis on real-time tracking and benchmarking of performance and service levels do reflect procurement's influence.

### Role of Account Managers

The role of the TMC account manager is changing as well. Service performance is still a critical success factor, but more and more companies are looking to their TMC account managers to serve an expanded role helping identify savings opportunities. The shifting role of account management is related to the proliferation of interactive dashboards. Rather than generating reports or using online analytical processing tools (OLAP) to uncover trends in corporate data, interactive dashboards free account managers to take a more proactive role.

### Growth of TMC Consulting Services

Many of the larger TMCs have successfully launched consulting services designed to take

this proactive analysis one step further. TMC consulting divisions work with clients, and sometimes clients of their competitors, to analyze current and proposed vendor contracts. These consulting units generally use complex modeling software, which looks at contract evaluation from multiple levels including the availability of required contracted inventory. Through these “what if” scenarios, TMC consulting representatives recommend detailed strategies for optimizing current and proposed vendor agreements.

## **Globalization**

One clear advantage for larger TMCs is their global footprints. The changes reflected by the breakup of BTI in 2006 reinforce the importance of control over global offices. This being said, global networks may be of equal value provided they can consistently deliver policy compliant services at all of their global locations. As previously stated, global information is the cornerstone of effective travel management. In recognition of this fact, TMCs have invested heavily in data aggregation and analysis services designed to consolidate travel information and identify areas of additional savings.

## Section 8

# ROI of Travel Management

### Overview

The most significant costs associated with any travel program are the fees paid to the core airline, hotel and car rental vendors. As a result, gains in program optimization related to airfare, hotel charges and car rental costs can represent significant cost savings to the corporate bottom line. Improving compliance of the existing travel policy can be the single most effective tool in reducing direct supplier costs. Eliminating unnecessary trips is another important strategy to reduce overall travel spending.

How much does a managed corporate travel program cost? The answer is complex and, of course, depends on the definition of services provided. Each part of the process has associated costs (see Table 8.1).

### Travel Management ROI

The days when the corporate travel department was considered a “profit center” are long gone. In the 1980s and 1990s, quarterly TMC rebate checks were common. This fund was partially fueled by “financial assistance” payments made to the TMC by the GDSs. These payments were actually rebating a portion of the segment fees paid by the airlines to the GDS that, in turn, were passed on to the TMC and, ultimately, the corporation. This

financial assistance was a primary target of GDS/airline contract negotiations.

As a result, many rebates have been reduced or eliminated. Some TMCs have implemented a new per-ticket charge to compensate them for the loss of revenue from the new GDS contracts. Calculating ROI for individual elements or technologies (e.g., self-booking tools) is now a common practice that measures the benefit of lower transaction costs and greater policy compliance against the fees for the travel technology tool. There is no question that a comprehensive travel management program provides savings to the company. Those savings come from leveraging volume to achieve greater discounts and control the purchase of travel and related activities at the point-of-sale to ensure compliance.

### Conclusion

There continues to be a lag in technology adoption in the corporate travel industry. However, by understanding emerging trends in e-commerce, online communities and enterprise computing, we can predict the next wave of corporate travel technologies. Using a static set of features to evaluate suppliers is a dangerous strategy as vendors continue to enhance their products to meet competitive pressures.

Features need to be evaluated within the context of specific corporate requirements. For

example, a given feature such as online rail booking only has value if it allows the corporation to access better rates, gain additional policy control and most importantly, corresponds to the company's travel patterns. Travel buyers need to be wary of vendor representatives that focus on feature selling rather than on a process that identifies the underlying corporate travel needs of the customer.

At the same time, the very role of travel management is changing with the increased influence of corporate procurement, which impacts the way services are delivered and the information requirements of corporate customers.

While terms like Travel 2.0 and Travel 3.0

seem like simple buzzwords, the underlying trend behind these next generation Web-based computing approaches should not be ignored. The consumer, including the business traveler, will continue to demand better information to make the right travel purchase that fits their personal preferences. In the case of the business traveler, meshing their personal preferences within the constraints of corporate policy will be a key evolution in the corporate travel booking process. These frequent travelers will increasingly depend on the views of their counterparts in evaluating supplier selection. Travel buyers need to be sensitive to these trends particularly as the MySpace and Facebook generations enter the workforce.

**Table 8.1**  
**Typical Travel Management Costs**

Product/Service	Description	Cost Range	Who Pays
Self-booking –touchless reservations	Reservations are made electronically without need for human intervention	\$4- \$8	If corporation contracts with self-booking vendor fees may be paid directly to the vendor. A more common practice is for TMCs to incorporate the fee into their pricing.
Call center booking	Reservations done by telephone by a call center agent	\$15 - \$65	This is a direct corporate fee paid to the TMC for agent assisted reservations. Some TMCs have three tiers- touchless, lightly touched and agent assisted
Mid –Office QA	Mid office quality control products that enable the touchless transaction	\$0.35 - \$5.55 per PNR	This cost is either paid by the TMC to a third party or absorbed by the TMC if an internal proprietary tool is used
MIS reporting	Software that allows Web-based standard and ad hoc reporting	Part of TMC offering or licensing fee to 3rd party vendor. 3rd party tools usually charge a licensing fee ranging from as low as \$600 to as high as \$100,000. In addition vendors charge a fee per PNR process ranging from \$12- \$.40 per transaction	There is generally no corporate fee for this capability unless the corporation contracts directly with a 3rd party provider. The feeds are dependent on the scope of MIS reports. Some vendors are charging an additional fee for dashboard analytics
Account Manager Services	TMC provides account manager to support travel management program	\$0- \$10,000 on a monthly basis	TMCs are trying to differentiate their standard verses added value account management services
TMC Consulting Services	TMC provide consulting services generally focused on contract performance, analysis and strategy	\$10,000 - \$250,000	This is a direct fee to the corporation.

Source: PhoCusWright Inc.



## Section 9

# Vendor Profiles

## Self-Booking Tool Vendors



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Amadeus provides secure distribution, IT hosting and operations, and point-of-sale solutions. Amadeus' solutions are grouped into four categories: Distribution and Content; Sales and e-Commerce; Business Management; and Services and Consulting. Amadeus services travel agencies in 90 countries, and powers the Web sites of over 1,000 corporations and more than 70 airlines and hotels.

Amadeus' flagship global corporate travel booking solution, Amadeus e-Travel Management, helps companies manage travel policies more efficiently. It integrates all the elements of a corporate travel program, including multiple GDSs and TMCs, travel policies, preferred suppliers, negotiated rates, and market-specific content. Amadeus e-Travel Management is available in 13 languages and 160 currencies.

Amadeus also provides flexible, open integration interfaces for portal, single sign-on, approval workflow, travel expense and human resources systems, corporate intranets and travel agency back-office systems. Its features include:

- **Amadeus Quick Shopper:** A new booking workflow that lets the traveler book a trip in as little as three clicks.
- **Fare Analyzer:** A patent-pending airfare display that allows travelers to categorize, sort and filter company-approved air itineraries based on price, trip duration, departure time, company preference and number of connections.
- **e-Concierge:** Destination content such as weather, point-to-point driving directions, event tickets and restaurant reservations.
- **Pre-trip approval via mobile device:** Extends the approval process to email and mobile devices like the Blackberry and Palm Treo and integrates with external systems.



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Founded in 1993, Concur provides on-demand employee spend management services to help clients control corporate travel and entertainment (T&E) expenses. It provides an end-to-end approach that unites online travel booking, meeting management and automated expense reporting. Its solutions include:

- **Concur Total Travel & Expense:** Combines seamless travel booking with instant expense reporting. A simplified, one-click format encourages employee adoption and its ability to red flag unauthorized items allows for better overall compliance. The click that books the trip also reports the expense in real time.
- **Concur Cliqbook Travel:** Delivers access to a broad selection of supplier content specifically tailored to the client's corporate travel policies. The system automatically includes discounts negotiated with vendors, provides access to exclusive direct connect suppliers and searches inventory from virtually all sources, flagging those that are in and out of compliance.
- **Concur Expense:** Streamlines and automates the expense reporting process with no upfront hardware or software investment or lengthy implementation.
- **Concur Meeting:** Helps with everything from

invitations and registrations to attendee travel reservations, communications and logistics. Delivers improved policy compliance, better visibility and complete control over corporate meeting spend.

Concur's end-to-end approach to travel and expense management provides a range of process efficiencies. Since the system is capturing data at each step of the process, it remembers that a particular reservation was booked with a preferred partner or provider, as well as how and why that expense was incurred. It also remembers transaction costs, charges, and whether they were conducted within company policy. In essence, the system is able to construct a trusted receipt using all of the data available. And since the entire travel booking and expense reporting process is united, corporations can capture booking, transaction and expense data.



**3150 Sabre Drive  
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www.getthere.com**

GetThere has been providing online corporate travel management to companies around the globe for 12 years. Today, GetThere serves more than 3,000 customers worldwide, including more than 60% of the Fortune 200 that use an online booking tool. GetThere drives more than 10 million bookings annually; gross travel spend booked through GetThere topped \$8 billion in 2006.

Through its direct corporate channel,

GetThere serves large, multinational companies with upwards of \$6 million in ARC spending. Its reseller channel comprises global and premium corporate travel management companies, which manage relationships with additional global and regional corporations.

GetThere's primary features are:

- An easy-to-use interface modeled after Travelocity's consumer site;
- Over 100 support professionals worldwide;
- System reliability proven with 99.97% uptime;
- Global reach with site implementations in more than 40 countries and on-the-ground support in 15 countries;
- Complete customization available through more than 3,000 customer-configurable options; and
- Flexible integration through data migration to virtually any enterprise system, including expense management.



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Rearden Commerce was founded in March 2000 by Patrick Grady. The company spent its first five years designing and developing an integrated global online marketplace for a wide

variety of services, including travel, dining, corporate entertainment, audio- and Web-conferencing and package shipping.

The Rearden Commerce solution ensures that employees consistently use preferred providers that offer negotiated discounts. Rearden has more than 400 customers, including such Fortune 500 companies as GSK, JDSU, Motorola and Whirlpool, and such mid-market customers as EPCO, FormFactor and Intechra.

Rearden's platform consists of three components:

- **REARDEN PERSONAL ASSISTANT:** Helps users find, schedule and purchase services from a network of more than 135,000 merchants, based on user preferences and company policies. As each service is booked, the personal assistant automatically updates the user's calendar, sends invitations and notifies users of schedule changes via email, SMS, phone or fax. The system leverages data about the user's identity, location, preferences and the context of what he or she is doing.
- **REARDEN SERVICES CONSOLE:** Uses a single Web interface to enable travel and procurement managers to provision new services and policies to thousands of employees. Managers using the services console can communicate and enforce spending policies at the point of purchase and guide employees to preferred suppliers offering negotiated discounts. Managers also have the ability to move employee transaction volumes from one supplier to another to maximize discounts and reward preferred suppliers for superior service.

- **REARDEN MERCHANT NETWORK:** An SOA-based marketplace with more than 135,000 merchants and content providers. Rearden combines content and service offerings from multiple providers to make the process of finding, purchasing and managing services more convenient to the end user.

Rearden Commerce sells its solution through its direct sales force and partnerships with more than 40 travel management companies. In 2006, American Express took a minority stake in Rearden Commerce; its subsidiary, American Express Business Travel, began deploying the company's technology to its 4,000 U.S.-based travel customers under the brand name AXIOM (American Express Intelligent Online Marketplace).

## Travel Software Companies

### Amadeus Quality Control

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Integrated with the Amadeus selling platform, Amadeus Quality Control helps increase travel agent productivity by systematically checking every PNR at the time of booking. The process reassures agents that the right information is being captured at the right time, and reduces manual errors and any PNR re-work that might otherwise be required. Quality check rules and administration are managed centrally.

Amadeus Quality Control allows agencies to define rules for an individual customer or company, and ensures that all individual preferences or corporate policies are adhered to at the time of booking. In addition, Quality Control rules can be used to prompt agents with context-based cross-selling or up-selling opportunities.

Amadeus Quality Control's primary features:

- **CUSTOMIZABLE:** Provides an unlimited number and type of rules. Rules can be associated to any element of the PNR and can be personalized to an individual customer or company. Rules can be set centrally and be deployed across all offices.
- **AUTOMATIC:** Every PNR is automatically and systematically checked for compliance and

consistency and includes host commands, external scripts or programs for automatic creation of availability or booking requests.

- **INTERACTIVE:** Quality checks can be run manually on-demand at any time during the reservation or automatically before PNR validation.

## Cornerstone

information systems

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Cornerstone Information Systems is a privately held company that provides reservation and data management applications to over 500 TMCs, corporate travel departments, meeting planners, airlines and GDSs. Its applications include ResMarker, iQCX, ResMail, AutoTicket, iBank, iBank Analytics, EasyFee, Pre Travel Authorization and Schedule Change Manager.

Cornerstone's technology serves as the platform to automate many of the most complex and time-intensive aspects of the reservation management process, such as trip improvement, quality control, itinerary delivery, automated fulfillment and travel program reporting and analysis.

Working with technology partners, Cornerstone users can modify their travel itineraries from their mobile devices, and agencies can see a real-time analysis of their revenue stream (to allow mid-stream changes and maximize their profit margins). Corporations can also assess the impact of their travel policies on

their financial objectives in a live, interactive format.

For future growth, Cornerstone has embarked on an integration plan with other technology companies that deliver specific and critical travel components, such as flight status alerts, real-time traveler tracking and itinerary and calendar integration.



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www.gdsx.com**

Founded in 2002, GDSX, Ltd. is a travel software developer and computer services provider. The company specializes in travel reservation-centric data consolidation and automation, including quality control (QC), reservation finishing and travel fulfillment services. It processes reservations for travelers in 37 countries.

The company's flagship product, COMPLETEAT, is a hosted software application that enables customer-authored automation processes and encompasses all aspects of global travel fulfillment, including multiple language handling for customer-facing communications. COMPLETEAT enables TMCs, CTDs, online travel providers and travel fulfillment companies to define and implement their own automated processes of touchless fulfillment, CRM and service delivery.

COMPLETEAT utilizes Microsoft's .NET framework. Utilizing industry-standard Web Services, COMPLETEAT customers can communicate with vendors and their own software applications without the use of proprietary

software. COMPLEAT provides the following:

- Programming access and administration of reservations originating from various GDS and alternative booking sources from a single unified program user interface;
- Structured data communication with each interfaced GDS; and
- Real-time and just-in-time data exports and automation services to external systems, including booking tools and other applications at the point of sale.



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Founded in 1994, KDS provides online travel procurement solutions that help corporations manage and reduce their travel and entertainment (T&E) costs. KDS Corporate, the company's on-demand, end-to-end software solution, enables business travelers to book their journeys and manage their expense claims online, while simultaneously allowing employers to enforce corporate travel policies. KDS Corporate has implementations in over 30 countries.

Operating as a Software as a Service (SaaS) provider, KDS' on-demand technology eliminates the need for expensive hardware investments and ensures that implementations and

system upgrades do not interrupt the flow of the customer's business.

KDS receives no travel commissions and subsequently has no conflicts of interest. In addition to its corporate customers, KDS serves many travel management companies and intermediaries, providing the white label technology that underpins their own online booking portals.

Headquartered in Paris, KDS has offices in San Francisco, London, Frankfurt and Stockholm and is backed by Accel Partners and Atlas Ventures.



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Trondent was founded in 1994 to provide affordable travel management products that could interface with all GDSs and automate time-consuming functions. Today, Trondent provides Web-based travel software applications and data-management services.

Trondent's products are compatible with all major travel distribution systems and are priced to be affordable to any size travel agency. Its travel technology services include

- **PROFILER:** GDS profile management, standardization, synchronization, and Web site development;
- **AIRFAX, AIRMAIL, AIRWEB AND MOBILE AIRWEB:** Customized e-itinerary and e-invoice delivery;

- **eTRAK AND eTRAK ALERT:** Unused e-ticket tracking, reporting and alert system;
- **AIRWEB AUTHORIZER:** Automated pre-trip approval service;
- **TRAVELTRAK:** Traveler tracking system that supports corporate risk management;
- **GROUPASSIST:** An arrival and departure manifest reporting tool for meeting and event planners; and
- **INFUZER:** Web-to-calendar integration software that copies any event to an e-calendar.



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www.trx.com**

TRX is a global technology company that develops hosted software applications to process data records and automate manual processes. The company has been in business for almost 20 years, and more than 250 agencies, airlines, corporations and payment providers use its software. Through its client and distributor relationships, TRX processes travel data and reservations on behalf of over 20,000 corporations.

TRAVELTRAX is TRX's application that helps clients reduce unnecessary travel costs by optimizing leverage with suppliers for deeper discounts. TRAVELTRAX leverages data visualization functionality, featuring a Web 2.0 dashboard that summarizes global travel data in a simple, intuitive, visual format.

TRAVELTRAX enables users to better control spending and maintain budgets, as well as save money through reduced travel expenses and better supplier contracts.

TRX Travel Analytics provides unbiased (no overrides or incentives) travel spend management services, helping clients understand global travel spend to maximize their negotiated contracts. TRX Travel Analytics provides global data consolidation with connections to over 250 sources of travel, payment, back-office, and expense management system data.

The company's CORREX quality control and auto-ticketing platform, launched in 1988, is currently in use by seven U.S. agencies and all four European Union agencies.

In 2007, TRX announced the launch of Gen6, the sixth generation of the CORREX application. Gen6 offers Web-based tools and administration from client-customized portals, providing more control and visibility into rules and business metrics. Gen6 also includes real-time dashboards to monitor queues, trip savings, and other key performance metrics, as well as Web 2.0 itinerary and contract management functionality. CORREX will continue to support non-GDS and supplier-direct data and integrate with a variety of databases and applications.

Lastly, RESX is TRX's corporate online booking engine, used to make policy-compliant online reservations through a self-service booking site. An independent solution residing on a .Net platform, RESX offers Web Services and facilities integration with third-party systems. It is also integrated with TRX's CORREX and TravelTrax applications.

## Travel Management Companies



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American Express Business Travel, a division of the American Express Company, operates over 2,200 travel service locations in over 140 countries. The company processed \$21.8 billion in global travel sales in 2006 and services nearly 14,000 clients.

American Express Business Travel provides a combination of booking technology, travel management consulting expertise, strategic sourcing, supplier-negotiation support and on- and offline customer service.

In addition to managing spend derived from sourcing traditional travel (air, hotel and car), American Express Business Travel also allows management of ancillary travel-related expenses – such as ground transportation, dining reservations, event tickets and package shipping – via the American Express Intelligent Online Marketplace (AXIOM). AXIOM is a Web-based commerce network for travel and travel-related services, and the network includes inventory from more than 135,000 suppliers in a single online destination.

## Atlas Travel INTERNATIONAL

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Founded in 1986, Atlas Travel works with more than 500 corporate customers in the New England region. The company offers integrated technology solutions, from customer data analysis to online and offline booking solutions.

In addition to servicing travelers, Atlas develops and customizes technology for airlines, hotel chains, insurance companies and other agencies, including technology support, development and integration.

Atlas' products include multi-GDS profile management, e-invoice/automated document delivery, global employee tracking, travel GPA benchmarking and management tools, unused ticket management, productivity enhancement solutions and low-cost online traveler booking engines.



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BCD Travel was founded in January 2006, when BCD Holdings N.V. announced its decision to purchase TQ3 Travel Solutions Management Holding GmbH and its majority interest in The Travel Company. The company then united these two companies with WorldTravel BTI.

BCD Travel provides solutions to customers on 13 booking tools globally, and supports 60-plus release cycles annually.

One of BCD Travel's key solutions is DecisionSource, an information management application that comprises two modules – DecisionSource: Data Manager and DecisionSource: Security Manager.

- DecisionSource Data Manager is an information management platform that provides information to measure program effectiveness, spot trends, improve cash management and drive savings and compliance. Data Manager supplies information to cross-functional teams both online and on-demand.
- DecisionSource Security Manager is a comprehensive global security and crisis management platform that provides pre-trip travel compliance, impact and event classification and monitoring, destination monitoring, and proactive traveler tracking.

BCD's portal solutions allow travel managers to create user feedback surveys, market new service solutions, provide online training services and monitor site usage through the use of a new content management system.

In addition to traditional travel services, BCD Travel provides meetings services through its BCD Meetings & Incentives division and consulting services through its consulting divi-

sion, Advito. To help clients address increasing efforts to be environmentally responsible, BCD offers a set of solutions that allow corporations to track carbon produced through travel.



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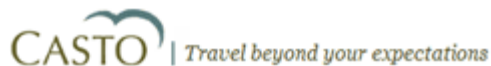
Carlson Wagonlit Travel (CWT) is a global travel management company present in nearly 150 countries, with 22,000 employees. CWT's solutions can be grouped into four categories:

- Traveler & Transaction Services: Includes an online travel portal; 24/7 emergency support; VIP services; mobile delivery of alerts and itineraries; and visa, passport, currency and insurance services.
- Program Optimization: Assesses client travel programs by analyzing and benchmarking key performance levers and defining performance targets, priorities and action plans. These are then translated into measurable results that are continuously monitored.
- Safety & Security: Supplies clients with destination intelligence, travel alerts and incident reporting to keep companies and their travelers informed of potential and actual risks before, during and after business trips. Traveler tracking reports are also avail-

able, allowing CWT to identify and support travelers who may be affected by national, regional or global emergencies or crises.

- **Meetings & Events:** The company's 650 meeting and event professionals plan and execute programs that respond to the needs of organizers and participants.

CWT has also developed the CWT Program Management Center, a multilingual Web-based tool to help clients access information and continuously track and optimize their travel programs.



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Founded in 1974, Casto is a privately owned travel management company in northern California, with global sales of more than \$135 million. The company provides corporate, concierge, vacation and group travel management services, as well as visa and passport processing. Casto has 200 employees located in offices throughout the San Francisco Bay Area, Manila and Rapid City, S.D.

Casto's on-demand travel management service, iCasto Online, enables clients to provide online corporate travel booking capabilities to their employees, which are tailored to clients' policies and preferred vendors. iCasto Reports, powered by iBank, gives clients access to 250 turnkey reports; clients can also choose customized

reports delivered by Casto's technical team. The newly released iCasto Dashboard provides clients with a comprehensive, multi-dimensional graphic view of their program. It is available on-demand and in real time.

As a certified Women and Minority Business Enterprise, Casto also meets supplier diversity objectives.



**3150 139th Avenue SE  
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Expedia Corporate Travel has annual bookings in excess of \$1 billion, serves over 3,500 companies worldwide, and has operations in the U.S., Canada, U.K., France, Belgium, Italy and Germany, with plans for further global expansion in Asia and Europe.

Expedia Corporate Travel's solutions include:

- Full-service, around-the-clock agents, executive services and account consultation;
- Intuitive tools for travelers and travel managers;
- Eighty-five percent average adoption rate; and
- Strong air, car and hotel supplier relationships.



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**<http://www.hrgworldwide.com/>**

HRG (Hogg Robinson Group) has more than 160 years of experience specializing in a range of corporate services for multinational and national clients. HRG provides expertise in global capabilities and local knowledge, non-aligned leading edge technology and a client-focused approach. HRG operates in almost 100 countries around the world.

Services include:

- Corporate travel management
- Expense management
- Events and meetings management
- Sports travel management
- Consulting



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**[www.orbitz.com](http://www.orbitz.com)**

Orbitz Worldwide offers online programs designed to reduce costs while providing superior travel shopping experiences and 24/7 proactive traveler care.

Orbitz Worldwide Corporate Travel Solutions includes two managed travel brands: Orbitz for Business and Travelport for Business. Together, these two brands currently serve over 2,000 corporate customers and more than one million managed business travelers. Orbitz for Business launched in 2002. Travelport for Business launched in 2005 and deploys technologies that integrate the online platform and offline agent services.

OrbitzTLC, a benefit to all Orbitz Worldwide business and leisure customers, is a set of customer care services that includes OrbitzTLC Alerts, which notify travelers (and up to six designated contacts) of flight status changes, cancellations and any events that might impact travel. OrbitzTLC also monitors nationwide travel conditions and world events 365 days a year. The service also includes mobile access, enabling corporate travelers to check travel itineraries, retrieve flight status information and find hotel availability in major U.S. markets through any Web-enabled cell phone or wireless device.



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An employee-owned company, RADIUS Travel and Transport was founded in 1946 and is currently the fifth-largest TMC in the U.S. Its operating divisions include:

- Business Travel Management,
- RADIUS Travel and Transport – Global,

- RADIUS Travel and Transport Vacations,
- Loyalty Innovations, and
- Meeting Trends.

RADIUS Travel and Transport clients are served by an employee-owner at every level. The company has a 98% client retention rate; its top 10 customers have been with the company for an average of 10 years each. The company has no debt.

The company's AMN ticket tracking process, Fare Busters programs and pre-trip reporting offer customers cost-savings solutions.

RADIUS Travel and Transport is a member of RADIUS, a global travel company that has 95 partner agencies in 80 countries around the world.



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Travelocity Business was introduced to the managed travel industry in 2003 and provides full-service global travel management, with more than \$800 million in travel spend under management.

The company is owned by Sabre Holdings and targets mid-size and large managed travel programs. Its accounts include Fortune 100 companies and firms specializing in aerospace, healthcare, media and retail.

Travelocity Business offers a range of corporate travel services, including the following:

- Configurable online and agent-assisted booking for business travel;
- Resources combined with Sabre and GetThere to provide clients with maximum efficiency throughout the business travel procurement process;
- A wide range of travel options, including Travelocity Business negotiated deals, company negotiated rates and access to exclusive Web fares;
- Around-the-clock traveler support via phone and Internet;
- Executive/VIP services;
- Travel management and consulting services; and
- In-depth reporting and analysis.





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