



# BusinessTravelNews

September 29, 2014

## 2014 CORPORATE TRAVEL

# 1000

*Profiling The Biggest U.S. Business Travel Spenders*

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# Most CT100 Buyers Hike Spending

The companies that make up the 27th annual *Business Travel News* Corporate Travel 100 in 2013 generally increased their U.S.-booked air volume from 2012 levels, but a solid minority cut that figure, some substantially. Even as the economic maladies of 2008 grow smaller in the rear-view mirror, travel cost control still clearly rules the day at some big companies.

Of the 50 CT100 companies that provided *BTN* with U.S.-booked air volumes for both 2012 and 2013, 29 indicated a year-over-year increase last year, and 17 indicated that increase was at least 5 percent. Conversely, 18 companies reported a year-over-year decrease in 2013 U.S.-booked air volume, and 10 indicated that decrease exceeded 10 percent. Three companies indicated static year-over-year spending. On the whole, the total 2013 U.S.-booked air volume for those companies increased 1.4 percent from 2012 levels.

The CT100, however, is more bullish about spending increases in 2014. Of the 50 CT100 companies that provided 2012 and 2013 figures, 46 also projected 2014 U.S.-booked air volumes. Of those 46, 34 companies expect higher such spending this year than last, and 11 expect that figure will be lower than it was in 2013, despite evidence that corporate

airfares this year generally are higher than they were last year.

**Methodology**

The CT100 is based on 2013 air tickets purchased for domestic or international business travel at all U.S. points of sale. Most listed organizations provided at least some information for use in their specific listings.

Respondent organizations completed an online questionnaire; some provided additional information in interviews. For organizations that did not participate, *BTN* used industry sources, published reports and other intelligence.

Respondents in their online questionnaire were asked to

list their organization's highest-volume and other preferred suppliers in the United States and in other regions; their responses are included alphabetically and by supplier category in the listings as "principal suppliers."

Seven firms not included last year qualified for this list, including first-time members Google, ITW and Stryker. Those falling off include Automatic Data Processing, BAE Systems, Dow Chemical, Qualcomm, SAIC, Thomson Reuters, the United Nations and UPS.

This year's CT100 floor of \$47 million in 2013 U.S.-booked air spending is \$2 million more than the floor in last year's edition.

## Corporate Travel 100 U.S. Accounts, By Agency

Agency	CT100 U.S. Accounts
American Express	37
BCD Travel	26
Carlson Wagonlit Travel	21
Hogg Robinson Group	5
Orbitz for Business	2
Other*	5
No single primary U.S. agency	4

\* Includes one client account each for Boeing Corporate Travel Dept., Egencia, Travelocity Business, TS24 and Walmart Corporate Travel Dept.

Note: This chart includes the companies listed in the Corporate Travel 100 for which single consolidated or primary U.S. travel agencies were identified by *BTN*.

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## A MESSAGE FROM OUR SPONSORS

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Dear travel professional,

Avis Budget Group is once again proud to sponsor this special edition of *Business Travel News*' 2014 Corporate Travel 100. This annual compendium of top travel programs reveals spending trends and other details that are invaluable for anyone engaged in corporate travel procurement and strategic

travel program planning.

As important as strategy planning and statistics are, I personally believe that unless you are leading or part of a values-based organization, long-term success will be elusive. At Avis Budget Group, all of our people come to work every day knowing that they are expected at all times to reflect our core values of **Commitment, Responsibility and Integrity**. These three inter-related concepts all add up to what I like to describe simply as "doing the right thing."

Doing the right thing, demonstrating core values, helps inform every decision our people make, from managing the careers of our associates; working with clients, customers and partners in an honest and transparent manner; and telling the truth even when it may not be the news that some people want to hear. It's treating all of your co-workers as the extended family that they are. It's putting people first, starting with the customer. At the end of the day, there is nothing unique about the vehicles that we offer. Our value proposition depends on our people making the difference, and when our people feel empowered to do the right thing, we succeed.

It's a fact that being truthful, straightforward and transparent is not the way business is done everywhere. That's why we have such a strong belief in being guided by our values... because this is how we truly differentiate ourselves from our competitors.

This year, don't guess at what the spend and management trends are...the *Business Travel News* 2014 Corporate Travel 100 is your go-to resource. Avis Budget Group will remain committed to serving as your growth partner, delivering the results you want—responsibly and with complete integrity.

Sincerely,

Thomas M. Gartland  
President of North America  
Avis Budget Group



Dear corporate travel professional:

For 25 years, CSI has been solving tough payment challenges—and nowhere are those challenges greater today than in the corporate travel industry.

If you are a travel, procurement or finance professional tasked with controlling corporate travel spend and accounting for those expenses, you know firsthand what I'm talking about: It's nearly impossible to ensure employees adhere to corporate travel policies when they're using their personal credit cards. Yet corporate cards pose security risks and bog your team down with hours of manual reconciliations.

CSI globalVCard is proud to introduce globalVCard for travel. We've worked hard over the past year to develop a solution that the travel industry would be as excited about as we are. After extensive research and stringent testing with a large travel management company and its corporate clients, globalVCard is tailor made to solve some of your greatest challenges.

A direct integration with TMC booking systems provides a seamless ability to book travel reservations for hotel, air and car rentals with a highly secure single-use virtual credit card. Each unique card number is tied to a specific transaction, enabling easy reconciliation with the help of robust reporting capabilities. There's so much more that you'll love about globalVCard—including the elimination of the hotel direct-bill challenge.

We are pleased to sponsor *Business Travel News*' Corporate Travel 100 issue and to advance travel management with innovative technology and first-class service. It would be our pleasure to help your company simplify payments for corporate travel.

Sincerely,

David Disque  
Chief Operations Officer  
CSI globalVCard

## A MESSAGE FROM OUR SPONSORS

**WESTIN**<sup>®</sup>  
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Dear travel partner,

Travel as we know it is transforming—as are we. Starwood knows today's business traveler is more diverse and global than ever, and companies need more than a one-size-fits-all interpretation of business-class. So we continue to invest in our nine distinct lifestyle brands and design our hotels and offerings around business traveler preferences to exceed expectations.

Consider our Westin brand, which has evolved into a global growth leader, celebrating its 200th hotel milestone. Westin offers a rejuvenation refuge for business travelers. Innovative programs and partnerships help them maintain their well-being on the road, whether that's keeping up with a workout routine, eating right, or enjoying a private, tech-equipped work space. We invite you to learn more about Westin on page 35.

On track to hit its 500th hotel in 2016, Sheraton has long established itself as a warm place that encourages community for guests who want to stay connected to their homes, their offices and with one another. Along with unprecedented global growth, Starwood is committed to significant renovations for its existing portfolio. All told, we are making a \$14 billion investment in these stunning new and renovated hotels.

Complementing our brand efforts, Starwood is rolling out programs that support the work you do for your companies. Launching in October 2014, our new customer loyalty program, SPG Pro, will offer meeting and travel professionals SPG elite status, upgrades and Starpoints for B2B business booked at any of our properties. Also launching in October is our new Corporate Transient Offering, SPG Business. Eligible companies that book a minimum of 100 nights at our hotels can enjoy discounted rates and benefits.

The combination of Starwood's unique brands, global footprint, and innovative programming allows us to harness the momentum of a new era in travel, providing travelers with more personalized experiences and your company with greater ease of doing business. Ultimately, Starwood and our customers are reimagining the business of travel.

Enjoy this year's *Business Travel News* Corporate Travel 100; we thank you for your continued partnership and hard work.

Alice Harrington-Caravello  
Vice President, Global Corporate Sales  
Starwood Hotels & Resorts



To our travel industry business partners:

Summer was fantastic but way too short! Can't we lobby Congress for an extra month? As we all settle back into business this fall, our team here at United Airlines hopes to make that transition a little easier.

We continue to make significant progress on delivering the products and services you said were necessary to ensure a successful partnership. Remember the old song, "What a difference a day makes"? Well, in our case it's been several years and billions of dollars of investments into our fleet, facilities, people, sales programs and products. We hope you'll agree that the difference is clear; take a look at some of the enhancements we've made so far in 2014—and know that more are coming!

- Offering the opportunity to sell and assign extra legroom United Economy Plus<sup>®</sup> seating in all three major GDS
- Improving messaging to TMCs closer to departure to ensure greater visibility and duty of care
- Providing expanded service hours through our dedicated 24/7 Executive Accounts Desk
- Delivering the industry's first evergreen corporate contract
- Implemented JV Simple agreements to facilitate easier contracting between United, Air Canada, ANA and the Lufthansa
- Enhancing travel agent tools with United PerksPlus<sup>SM</sup> tour code tracking and a more user-friendly UATP platform
- Keeping travelers connected to their business via United Wi-Fi<sup>SM</sup> installed on more than half of our mainline fleet in 2014
- Investing in network expansion to take business travelers to key business markets around the world


On behalf of United's Worldwide Sales team, thank you for your business, support and trust. We look forward to welcoming you and your colleagues to the friendly skies soon!

Dave Hilfman  
Senior Vice President, Worldwide Sales  
United Airlines

Rank/Company	Air Volume*	Rank/Company	Air Volume*
1 IBM	\$590	51 Merck	\$75
2 Deloitte	\$405.2	51 Morgan Stanley	\$75
3 General Electric	\$330	51 SAP	\$75
4 Oracle	\$329	51 Verizon	\$75
5 Boeing	\$318.3	55 International Monetary Fund	\$73
6 Exxon Mobil	\$293	55 Sanofi	\$73
7 EY	\$255.6	57 Schlumberger	\$71.8
8 PricewaterhouseCoopers	\$244	58 Intel	\$70.6
9 Accenture	\$243	59 Danaher	\$70
10 Lockheed Martin	\$226.2	60 UBS	\$69
11 General Dynamics	\$214	61 Deutsche Bank	\$68.6
12 Wells Fargo	\$202	62 Boston Consulting Group	\$67
13 JPMorgan Chase & Co.	\$199.7	63 Transocean	\$65
14 Hewlett-Packard	\$198	63 UnitedHealth Group	\$65
15 McKinsey & Co.	\$195	65 Marsh & McLennan	\$64
16 Royal Dutch Shell	\$191	66 American International Group	\$63.4
17 Bank of America	\$188	67 Walmart	\$63
18 Apple	\$180	68 L-3 Communications	\$62
19 Microsoft	\$179	69 BASF	\$61
20 Google	\$170	69 Bayer	\$61
21 World Bank Group	\$167.2	69 Omnicom Group	\$61
22 Johnson & Johnson	\$165.3	72 Amazon.com	\$60
23 KPMG	\$155	72 Deere & Co.	\$60
23 Siemens	\$155	72 WPP	\$60
25 Roche	\$150	75 Amgen	\$59
26 Chevron	\$147	75 Emerson Electric	\$59
27 Novartis	\$135.8	75 Nike	\$59
28 United Technologies Corp.	\$133.1	78 Credit Suisse	\$58
29 Procter & Gamble	\$130	79 Fidelity Investments	\$57.7
30 Walt Disney	\$128.5	80 Ford Motor Co.	\$57.2
31 Abbott Laboratories	\$126	81 Illinois Tool Works	\$57
32 Raytheon	\$121	82 3M	\$55.9
33 Citigroup	\$116	83 eBay	\$55
34 Goldman Sachs Group	\$113	84 Royal Philips	\$54
35 Cisco Systems	\$111	84 Stryker	\$54
36 Northrop Grumman	\$109.7	86 GlaxoSmithKline	\$53.9
37 Pepsico	\$105	87 Koch Industries	\$53
38 Eli Lilly and Co.	\$100	87 Nestlé	\$53
39 Fedex	\$98	89 Interpublic Group of Cos.	\$52.6
40 Caterpillar	\$96	90 21st Century Fox	\$51.4
41 Comcast	\$95	91 Publicis	\$51
42 BP	\$92.8	92 E. I. du Pont de Nemours	\$50
43 Barclays	\$87	92 Johnson Controls	\$50
43 Time Warner	\$87	92 Motorola Solutions	\$50
45 General Motors	\$84.5	95 ConocoPhillips	\$49.4
46 EMC	\$84	96 Aon	\$49.1
46 Honeywell	\$84	97 Coca-Cola	\$48.6
48 Dell	\$82	98 Boston Scientific	\$48
49 Pfizer	\$81.8	99 Church of Latter-Day Saints	\$47.2
50 Medtronic	\$81	100 AT&T	\$47

Company	Rank	Company	Rank
21st Century Fox	90	IBM	1
3M	82	Illinois Tool Works	81
Abbott Laboratories	31	Intel	58
Accenture	9	International Monetary Fund	55
Amazon.com	72	Interpublic Group of Cos.	89
American International Group	66	Johnson & Johnson	22
Amgen	75	Johnson Controls	92
Aon	96	JPMorgan Chase & Co.	13
Apple	18	Koch Industries	87
AT&T	100	KPMG	23
Bank of America	17	L-3 Communications	68
Barclays	43	Lockheed Martin	10
BASF	69	Marsh & McLennan	65
Bayer	69	McKinsey & Co.	15
Boeing	5	Medtronic	50
Boston Consulting Group	62	Merck	51
Boston Scientific	98	Microsoft	19
BP	42	Morgan Stanley	51
Caterpillar	40	Motorola Solutions	92
Chevron	26	Nestlé	87
Church of Latter-Day Saints	99	Nike	75
Cisco Systems	35	Northrop Grumman	36
Citigroup	33	Novartis	27
Coca-Cola	97	Omnicom Group	69
Comcast	41	Oracle	4
ConocoPhillips	95	Pepsico	37
Credit Suisse	78	Pfizer	49
Danaher	59	PricewaterhouseCoopers	8
Deere & Co.	72	Procter & Gamble	29
Dell	48	Publicis	91
Deloitte	2	Raytheon	32
Deutsche Bank	61	Roche	25
eBay	83	Royal Dutch Shell	16
E. I. du Pont de Nemours	92	Royal Philips	84
Eli Lilly and Co.	38	Sanofi	55
EMC	46	SAP	51
Emerson Electric	75	Schlumberger	57
Exxon Mobil	6	Siemens	23
EY	7	Stryker	84
Fedex	39	Time Warner	43
Fidelity Investments	79	Transocean	63
Ford Motor Co.	80	UBS	60
General Dynamics	11	UnitedHealth Group	63
General Electric	3	United Technologies Corp.	28
General Motors	45	Verizon	51
GlaxoSmithKline	86	Walmart	67
Goldman Sachs Group	34	Walt Disney	30
Google	20	Wells Fargo	12
Hewlett-Packard	14	World Bank Group	21
Honeywell	46	WPP	72

\*2013 U.S.-booked air volume, in millions



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**1 IBM**

**ARMONK, N.Y.**

**2013 U.S.-BOOKED AIR VOLUME:** \$590 million

**PRINCIPAL SUPPLIERS:** American, Delta; Hilton, Marriott; Avis, Hertz; American Express; Orbitz for Business

**CONSOLIDATED GLOBAL AGENCY:** American Express

IBM in 2013 maintained its longtime hold on the title of the largest corporate buyer of U.S.-booked air travel.

*BTN* estimates the technology and consulting heavyweight's U.S.-booked air volume increased about 4 percent from the prior year. That growth came despite a 5 percent reduction in the company's full-year revenue from \$104 billion in 2012 to \$99.8 billion in 2013.

In 2013, IBM invested \$3.1 billion in 10 acquisitions and \$3.8 billion in net capital expenditures.

The company's travel procurement team has been working on taking the company strategy of being global, local, social and mobile into the travel marketplace and enabling that for its travelers through a refreshing of its travel program.

The company also has focused on optimizing traveler security. In conjunction with consolidated global travel management company American Express, IBM's security, human resources and travel procurement teams implemented a duty-of-care program through which it can locate and communicate with travelers.

If necessary, travelers can use their mobile devices to connect with International SOS, iJet or the travel management company. Internally, one company objective is to push travelers to use mobile devices to plan, book, change and manage itineraries.

IBM continues to be among a group of Delta's large corporate customers using the carrier's new check-in recognition program, which greets travelers from those accounts and makes note of their company affiliation when checking in for flights.

The IBM airline program includes spending for both individual and group travel. IBM's hotel program compiles a global directory of hotel properties that meet IBM safety and security guidelines with prenegotiated rates.

IBM's auto-rental strategy is to provide world-class service and constant competitive advantage pricing. When auto leasing is appropriate, IBM uses outsourced fleet administration to provide maintenance and other services as specified on an individual country basis. Globally, IBM requires a supplier management structure that can provide consolidated management reporting and information, as well as clear communication management channels starting at the country level. When it comes to other ground transportation for business travel and meetings needs, IBM has a preferred supplier network of city-specific services.

IBM uses travel agency services to make transient and group reservations. It requires its agency to fulfill online reservations on the ground globally and to provide consolidated reporting.

In the spring of 2014, IBM signed an agreement to use the Orbitz for Business booking tool through 2020, with the intention of implementing it rapidly in 90 markets.

IBM had used Travelport's Traversa tool for online booking for

several years, but Orbitz also had provided account management and technology support to IBM as part of that arrangement. Orbitz and Travelport have a long shared history, with the two part of the same company until Orbitz's public spinoff in 2007, and Travelport until July 2014 was its largest shareholder.

IBM operates in more than 175 countries. Of its more than 431,000 employees worldwide, about 300,000 have travel profiles.

**2 DELOITTE**

**NEW YORK**

**2013 U.S.-BOOKED AIR VOLUME:** \$405.2 million

**2013 U.S. T&E:** \$1 billion

**PRINCIPAL SUPPLIERS:** American, Delta, United; Hilton, Marriott, Starwood; Avis Budget; Orbitz for Business

**CONSOLIDATED U.S. AGENCY:** BCD Travel

Big Four professional services firm Deloitte in 2013 focused on sourcing and demand-management initiatives as a means to continue cost control and provide options for high-quality travel services. The firm also used automation to improve risk-management processes.

Deloitte's U.S.-booked air volume in 2013 increased about 4.5 percent year over year, while its total U.S. T&E spending grew 4.2 percent. Those increases were smaller than the 15 percent jumps reported for both categories between 2011 and 2012.

The firm's domestic U.S. travel accounts for 73 percent of its total air spend. Deloitte employs approximately 64,000 travelers, up from 60,000 a year ago. Looking ahead, the firm's 2014 U.S.-booked air volume figure is projected to rise another 5 percent.

This year Deloitte intends to implement new online and mobile booking options while continuing to manage demand and improve the end-user experience. A key challenge is to proactively manage the travel program to keep pace with the rapid changes in supply base and new technologies.

The firm has not made significant changes to travel policy and continues to use BCD Travel as its consolidated travel agency and Orbitz for Business International as its online booking tool. Fifty-seven percent of all bookings are completed online and 76 percent of these bookings require no agent assistance.

Deloitte currently has 107 offices in 90 U.S. cities.

**3 GENERAL ELECTRIC**

**FAIRFIELD, CONN.**

**2013 U.S.-BOOKED AIR VOLUME:** \$330 million

**2013 COMPANYWIDE AIR VOLUME:** \$550 million

**PRINCIPAL SUPPLIERS:** Sabre GetThere; Concur Expense; American Express

**CONSOLIDATED GLOBAL AGENCY:** Carlson Wagonlit Travel

*BTN* estimates that General Electric in 2013 increased its U.S.-booked air volume almost 5 percent from \$315 million in 2012, following a 10 percent reduction from 2011.

GE's travel program largely is consolidated under travel man-

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agement company Carlson Wagonlit Travel, global distribution system Sabre, corporate card American Express, expense reporting system Concur and booking tool GetThere, with which GE in 2011 renewed a multi-year agreement. The company uses other suppliers, however, on a limited basis as required by needs in various global regions.

The multinational conglomerate in recent years has focused more heavily on its industrial division—equipment and services for the energy industry, for example—and has been shrinking the size of its financial arm, GE Capital.

GE is focused on reducing its administrative overhead cost by \$4 billion from 2012 to 2016, with the goal of reducing its selling and administrative cost to 12 percent of its revenue.

GE revenue in 2013 was \$146 billion, down \$1 billion from 2012.

GE employed 135,000 people in the United States and 307,000 people globally at the end of 2013, up 1,000 in the United States and 1,000 elsewhere from 2012.

## 4 ORACLE

REDWOOD SHORES, CALIF.

**2013 U.S.-BOOKED AIR VOLUME:** \$329 million

**PRINCIPAL SUPPLIERS:** American, Delta, United; Hilton, Marriott, Starwood; Avis, Hertz; Sabre GetThere; Oracle iExpense; American Express

**CONSOLIDATED GLOBAL AGENCY:** Carlson Wagonlit Travel

*BTN* estimates that business software and services provider Oracle increased its U.S.-booked air volume in 2013 to \$329 million.

Oracle in recent years has pioneered an effort to get ancillary airline fees, including checked-bag and upgrade fees, to count toward its contracts in instances where there was a shortfall. The project required getting more robust data management from airlines as well as partnering with card provider American Express and data supplier TRX, now owned by Concur.

Oracle reports financial data on a July-to-June fiscal year and for the 2014 fiscal year reported a net income of \$3.6 billion, down from \$3.8 billion in the 2013 fiscal year. Total company headcount was 122,274, up from 120,234 in the previous fiscal year.

## 5 THE BOEING CO.

CHICAGO

**2013 U.S.-BOOKED AIR VOLUME:** \$318.3 million

**2013 COMPANYWIDE AIR VOLUME:** \$333.5 million

**2013 COMPANYWIDE T&E:** \$677 million

**PRINCIPAL SUPPLIERS:** Hilton, Hyatt, Marriott; Avis, Budget; Concur

**CONSOLIDATED U.S. AGENCY:** Boeing Corporate Travel Department

Boeing and its ARC-accredited Corporate Travel Department during 2013 progressed on several travel management initiatives, including expansion to international locations to service joint ventures and subsidiaries. The aerospace and defense firm also capped hotel and car rental rates within its Concur-provided online

booking tool and renegotiated airport parking deals. Boeing also introduced a program that donates to charities the hotel loyalty program points accrued by meetings and group travelers.

The company's 2013 U.S.-booked and companywide air volumes were down marginally from the prior year—following a 3 percent increase from 2011 to 2012—but the U.S. figure is expected to increase about 2.5 percent this year.

Companywide, overall T&E in 2013 declined more noticeably, down nearly 10 percent.

Policy changes last year included itemized receipt requirements for meals and other food expenses of at least \$75, and requirements for receipts on all expenses incurred outside the United States.

For the current year, Boeing intends to continue implementing international services, applying international hotel-rate caps based on U.S. General Services Administration rates and improving reporting capabilities. It also continues to strive for consistent policy enforcement and global compliance for its 90,000 travelers.

Corporate travel policy changes planned for 2014 include new rules that determine eligibility of reimbursable business-class flights. Meanwhile, as part of an effort to enhance a communications plan related to changing policies, the travel team this year updated the company's travel website to include visual depictions of key policy topics.

Accounting for 81 percent of total air transaction volume, U.S. travel is serviced by Boeing's CTD, which also manages many of the company's bookings made outside of the United States. In Asia, a small portion of travel bookings are handled by BCD Travel and Swire Travel.

Boeing continues to use Concur for both online booking and expense management automation, both inside and outside the United States. Within the United States, 92 percent of air bookings went through the Concur tool, 67 percent of which required no agent assistance.

Boeing switched preferred car rental brands to Avis and Budget.

## 6 EXXON MOBIL

IRVING, TEXAS

**2013 U.S.-BOOKED AIR VOLUME:** \$293 million

**CONSOLIDATED GLOBAL AGENCY:** Carlson Wagonlit Travel

Exxon Mobil in 2013 boosted its U.S.-booked air volume year over year, according to *BTN* estimates.

At the same time, the energy company was trimming overall costs and deductions to \$380.6 billion from \$402 billion, though capital and exploration expenditures were up 6 percent. Its total revenues in 2013 declined to \$438.3 billion, compared with \$480.7 billion in 2012. The company also trimmed its headcount by 1,900 employees to 75,000 in 2013.

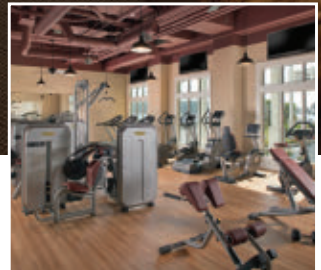
Exxon Mobil embarked on a number of global growth projects in 2013, including six major upstream projects with a total capacity of more than 930,000 oil-equivalent barrels per day, a chemical expansion project in Singapore and the onset of commissioning activities at its liquefied natural gas project in Papua New Guinea.



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**7 EY**  
LONDON

**FY 2014 U.S.-BOOKED AIR VOLUME:** \$255.6 million

**FY 2014 ORGANIZATION-WIDE AIR VOLUME:** \$467.3 million

**FY 2014 U.S. T&E:** \$681.6 million

**FY 2014 ORGANIZATION-WIDE T&E:** \$1.7 billion

**PRINCIPAL SUPPLIERS:** American, Delta, United; Hilton, Marriott, Starwood, Avis, Hertz, National; Amadeus e-Travel Management, Sabre GetThere

**CONSOLIDATED U.S. AGENCY:** American Express

Big Four accounting and professional services organization Ernst & Young (now using the EY brand name) increased its U.S.-booked air volume during fiscal 2014 (which ended June 30, 2014) about \$40 million from the prior fiscal year. Total U.S. T&E spending jumped about 15 percent. Organization-wide, air volume and T&E increased 16 percent and 14 percent, respectively.

American Express continues to serve as the organization's consolidated U.S. travel agency, with HRG implemented in Europe, the Middle East and Africa, and Carlson Wagonlit Travel in Asia/Pacific and Latin America.

Last year, EY met its objective to reduce to three the total number of TMCs used globally.

The organization also completed requests for proposals for global airline and hotel programs and for long-stay serviced apartments. A goal for the current year is to leverage global transient travel spending with meetings and events spending.

In terms of policy, EY in 2013 implemented a 14-day advance airfare purchase requirement for travel not related to client activity and a lowest-logical airfare requirement for all travel.

The organization also introduced caps for maximum hotel rates in markets in which EY has a preferred hotel, totaling more than 500 cities globally.

This year, EY began requiring employees to use long-stay serviced apartments for stays of five nights or more, implemented an exception-approval process for noncompliant travel and further promoted use of the travel management organization and online booking tool.

On the latter, EY continues to use the Sabre GetThere self-booking tool for U.S. travelers and Amadeus e-Travel Management as the primary tool elsewhere. Within the United States, 79 percent of tickets booked went through GetThere, 82 percent of which required no agent assistance.

The organization also continues to use American Express corporate cards under an individual bill/individual pay model. For expense management technology, the organization uses custom internal software.

EY's greatest travel management challenge is mitigating cost increases as headcount grows, now totaling more than 190,000.

For the year ending June 30, 2013, EY reported a 5.8 percent revenue increase (in U.S. dollars, and 7.7 percent in local currency) to \$25.8 billion, representing its fastest growth in five years. Emerging markets overall showed 12 percent growth, with larger increases

reported for Brazil, Turkey, India and Vietnam.

In terms of environmental impact, the organization reported that as of the end of fiscal 2013 travel emissions had grown 18 percent from a 2008 baseline. Emissions per person, however, declined 14 percent during the same time period.

Among emissions-reduction initiatives, EY upgraded videoconferencing capabilities, including implementation of telepresence equipment in 20 locations.

**8 PRICEWATERHOUSECOOPERS**  
NEW YORK

**2013 U.S.-BOOKED AIR VOLUME:** \$244 million

**2013 COMPANYWIDE AIR VOLUME:** \$390 million

**2013 U.S. T&E:** \$545 million

**2013 COMPANYWIDE T&E:** \$773 million

**PRINCIPAL SUPPLIERS:** American, Delta, United; Hilton, Marriott, Starwood; Avis, Hertz; Deem, KDS; SAP; American Express

**CONSOLIDATED U.S. AGENCY:** American Express

After an increase from 2011 to 2012, PricewaterhouseCoopers' U.S.-booked air volume fell marginally last year to \$244 million (80 percent of which was for travel within the United States) while its global air volume inched up about \$1 million. Overall U.S. and companywide T&E figures were down slightly.

Those moderated or reduced spending levels came as the company increased revenue 4 percent to \$32.1 billion during the fiscal year ending June 30, 2013.

During 2013, the professional services firm enhanced efforts to collect traveler feedback as a means to improve service delivery and relationships with suppliers.

Employee engagement included use of an internal social media site for travelers and travel bookers. The company also increased use of nonrefundable airline tickets and began reimbursing trusted-traveler program enrollment fees.

For the current year, PwC's travel management goals include additional cost management, an improved traveler experience, new sourcing strategies and better leverage from combining meetings and transient travel.

American Express continues to serve as PwC's consolidated U.S. travel agency, while HRG is the company's primary travel services provider outside the United States.

The company's other preferred travel suppliers largely are the same as those listed in last year's report. That includes the KDS booking tool in Europe and the Deem (formerly Rearden Commerce) booking tool in the United States. Ninety-one percent of 2013 U.S. air tickets were booked through the approved online tool, 79 percent of which required no agent assistance.

PwC supplies its 34,000 travelers with American Express corporate cards, set up in an individual bill/individual pay configuration. SAP continues to provide expense management automation both inside and outside the United States.

The Big Four professional services firm employs more than 184,000 people across offices in 157 countries.



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**9 ACCENTURE****DUBLIN, IRELAND****2013 U.S.-BOOKED AIR VOLUME:** \$243 million**2013 COMPANYWIDE AIR VOLUME:** \$567 million**2013 U.S. T&E:** \$630 million**2013 COMPANYWIDE T&E:** \$1.4 billion**PRINCIPAL SUPPLIERS:** American, Delta, United; Hilton, Marriott, Starwood; Avis, Hertz; Sabre GetThere; American Express**CONSOLIDATED GLOBAL AGENCY:** Carlson Wagonlit Travel

Consulting giant Accenture during 2013 progressed on several travel management initiatives including hotel rate caps implemented globally in major markets, personalized travel summaries made available to travelers that now also show peer benchmarks, high-level itinerary sharing via an internal social network and a traveler recognition program based on policy compliance and sharing trip information with colleagues. The firm also worked to reduce missed savings.

Accenture's 2013 U.S.-booked air volume was up from \$237 million in the prior year while global air volume was about unchanged. Total U.S. T&E was down \$9 million from 2012 while global T&E roughly was in line.

For the current year, Accenture continues to push compliance across various aspects of its travel program—including a “Smart Purchase” program intended to encourage advance-purchase buying behaviors—and enhance associated technology. It also continues to improve other processes and strives to achieve travel data consistency. Travel policy changes in 2014 include requiring pre-trip approval for international travel and strengthening language around noncompliance.

Carlson Wagonlit Travel is Accenture's consolidated global agency, serving 90,000 travelers and working closely with the firm on many projects. Sabre continues to furnish a GetThere self-booking tool used inside and outside the United States; about 94 percent of 2013 U.S. airline tickets were booked through the tool, 80 percent of which required no manual intervention. Both metrics were slightly improved from the prior year.

Accenture's U.S. travelers continue to use American Express corporate cards set up in an individual bill/individual pay configuration. Accenture also continues to use its own internal tool for expense reporting, both inside and outside the United States.

Principal airline, lodging and car rental suppliers in 2013 were unchanged from the prior year. Accenture's real estate department also has a deal with workspace management firm LiquidSpace to help arrange small, single-day, short-term meetings.

As a consulting firm, a large portion of Accenture's carbon output is generated by business travel. To reduce that output, the company focuses on deploying remote conferencing technology and now, according to its 2012–2013 Corporate Citizenship Report, averages about 43 million videoconferencing minutes annually. Accenture also cited the personal My Travel Summary dashboards, stating that “by providing monthly and year-to-date summaries of their carbon emissions, and encouraging them to use virtual meeting technolo-

gies, this tool makes it easier for our people to understand their travel-related carbon impact.” Considering those and other efforts, Accenture in fiscal 2013 reduced emissions from air travel 5 percent from fiscal 2012, to 1.33 metric tons per employee.

Accenture overall has 293,000 employees spread across 200 cities in 56 countries.

**10 LOCKHEED MARTIN****BETHESDA, MD.****2013 U.S.-BOOKED AIR VOLUME:** \$226.2 million**2013 COMPANYWIDE AIR VOLUME:** \$233.7 million**2013 U.S. T&E:** \$485.3 million**2013 COMPANYWIDE T&E:** \$485.3 million**PRINCIPAL SUPPLIERS:** American, Delta, United; Hilton, InterContinental, Marriott; Avis, Budget; U.S. Bank; Sabre GetThere; Concur Expense, IBM Global Expense Reporting Solution**CONSOLIDATED GLOBAL AGENCY:** BCD Travel

After declining marginally from 2011 to 2012, Lockheed Martin's U.S.-booked air volume in 2013 rebounded, jumping 14 percent. The figure is expected to reverse again this year, retreating to roughly \$190 million. Companywide air volume last year increased 12 percent. In terms of total 2013 T&E expenditures, the U.S. figure declined 6 percent and the global amount dropped 5 percent. The increase in air volumes specifically amid a decline in overall T&E spending related to rising international travel, for which certain employees now are allowed to use airline business classes.

The aerospace, defense and security contractor has set a goal to generate within the next few years 20 percent of total revenue from business outside the United States. In July 2013, the company formed Lockheed Martin International, a new organization responsible for growing global business that, according to Lockheed's annual report, already comprises operations in 70 countries and 1,000 global partnerships.

To support such growth, Lockheed's travel department transitioned primary non-U.S. locations to operations owned by BCD Travel, its new primary global agency. In the middle of 2013, Sabre Holdings' Travelocity Business—which had been servicing Lockheed—was sold off to BCD Travel. As one of the largest clients to come over as part of the acquisition, Lockheed was among the first to be integrated into the BCD Travel global network. More than 90 percent of Lockheed's U.S.-based travel (accounting for about 54 percent of its global air volume) now is handled by BCD Travel.

A goal for this year is to continue to globally expand agency operations and to continue pushing employees to use advance-purchase airline tickets. The company also intends to introduce the Sabre GetThere online booking tool in several non-U.S. locations. Within the United States, GetThere in 2013 handled 95 percent of domestic tickets issued.

For payment, Lockheed continues to provide U.S.-based travelers with U.S. Bank cards in an individual bill/individual pay configuration. Expense management automation within the United States is furnished by IBM GERS, though that likely will change now

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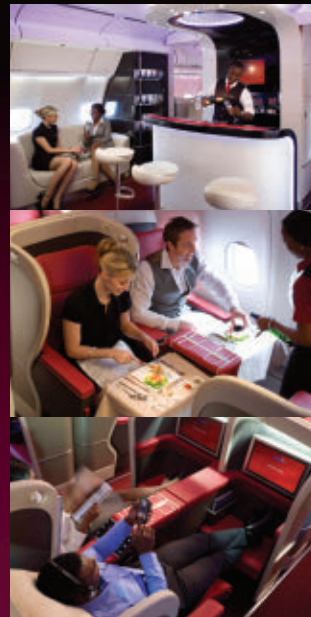
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that IBM is getting out of that line of business. Outside the United States, Concur is used in some locations for expense management.

For hotel rates, Lockheed is at or below the federal per diems set by the U.S. General Services Administration. The company also uses the Dinova dining program to obtain rebates at participating restaurants.

In terms of employee well-being, Lockheed provides ergonomics guidelines and training to help mobile workers, including business travelers at hotels and passing through airports, properly position laptops and tablets. Working with its travel agency, the company also measures carbon emissions from employee air travel and car rentals. In its latest sustainability report, Lockheed noted that “our investors and customers, primarily the U.S. Department of Defense, are increasing their focus on carbon performance, and may begin ranking and incentivizing contractors based on their performance.”

The Defense Department accounted for 61 percent of Lockheed’s 2013 net sales of \$45.4 billion, with the other U.S. government agencies accounting for another 21 percent.

## 11 GENERAL DYNAMICS

FALLS CHURCH, VA.

**2013 U.S.-BOOKED AIR VOLUME:** \$214 million

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

General Dynamics reduced its U.S.-booked air volume year over year in 2013, according to *BTN* estimates.

The aerospace and defense company cut overall operating costs and expenses more than 10 percent year over year as revenues remained about steady. The company reported 96,000 employees as of the end of 2013, up from 92,200 in 2012.

The company’s net income in 2013 was \$2.4 billion, compared with a loss of \$332 million in 2012.

## 12 WELLS FARGO & CO.

SAN FRANCISCO

**2013 U.S.-BOOKED AIR VOLUME:** \$202 million

**2013 COMPANYWIDE AIR VOLUME:** \$209.4 million

**PRINCIPAL SUPPLIERS:** Delta, United, US Airways; Hilton, Marriott, Starwood; Enterprise, Hertz, National; Concur Travel; Concur Expense; MasterCard, Visa

**CONSOLIDATED GLOBAL AGENCY:** HRG

Wells Fargo’s U.S.-booked air volume increased \$13 million during 2013 and is expected to grow again during the current year about the same amount, to \$216 million. Companywide air spending last year increased about 6 percent.

The financial services company in 2013 improved compliance to its travel program and increased to 61 percent the proportion of all airfares purchased at least 14 days in advance. This year, Wells Fargo continues to extend its pre-trip approvals process and track trip purposes. The company has not made any recent notable travel policy modifications.

Fielding 85,000 travelers, Wells Fargo continues to use Hogg

Robinson Group as its consolidated global travel agency, including within the United States, where 95 percent of companywide air volume is generated.

The company also continues to use Visa and MasterCard payment programs in a central bill/central pay configuration. Its other principal suppliers, too, have not changed from the prior year.

Concur is used for both travel booking and expense management automation, both inside and outside the United States. The online travel booking tool accounted for 96 percent of U.S. airline tickets, 84 percent of which required no agent assistance.

According to the Wells Fargo employee handbook, employees “are expected to consider the more economical options of audio, video, or web conferencing for internal meetings before booking travel.”

With offices in 36 countries and a global workforce of about 265,000 spread across its 90 businesses, the company also is a supplier of commercial cards. In mid-2014 Wells Fargo announced it had built an expense reporting tool for its corporate card clients.

## 13 JPMORGAN CHASE & CO.

NEW YORK

**2013 U.S.-BOOKED AIR VOLUME:** \$199.7 million

**PRINCIPAL SUPPLIERS:** American, Delta, United; Hilton, Marriott, Starwood; Avis, Enterprise, Hertz; Sabre GetThere; MasterCard

**CONSOLIDATED GLOBAL AGENCY:** Carlson Wagonlit Travel

JPMorgan Chase increased its U.S.-booked air volume 8 percent year over year in 2013, according to *BTN* estimates.

The financial services company’s principal suppliers remained largely unchanged from the prior year. JPMorgan continued to expand use of Sabre’s GetThere booking tool, implementing it last year in Italy, Mexico and Ireland. United and Marriott remained its highest-volume air and hotel suppliers, respectively.

Employees in 2013 reported expenses on an internal tool, though the firm is moving them to the Concur tool.

JPMorgan Chase’s net income declined 16 percent year over year to \$17.9 billion in 2013. The firm reduced its headcount to 251,196 in 2013, compared with 258,753 in 2012.

## 14 HEWLETT-PACKARD

PALO ALTO, CALIF.

**2013 U.S.-BOOKED AIR VOLUME:** \$198 million

**CONSOLIDATED GLOBAL AGENCY:** Carlson Wagonlit Travel

*BTN* estimates that tech giant Hewlett-Packard in 2013 increased its U.S.-booked air volume even as the company pushed to reduce air travel in favor of more environmentally friendly forms of travel and remote conferencing.

About one-third of the company’s 317,500 employees travel, according to HP’s 2013 Living Progress Report. Its estimated emissions from air travel in 2013 totaled 260,000 metric tons of equivalent carbon dioxide, down 10,000 metric tons from the year prior. Overall travel emissions, which also include HP’s transportation fleet,

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declined to 372,200 metric tons, compared with 403,100 in 2012.

The company last year added a link to the U.S. Environment Protection Agency's emissions calculator to help travelers measure the carbon footprint of their trips. It also created an eco-travel portal so that employees can get tips on how to travel in more environmentally friendly ways, including sharing rental cars and using trains, fuel-efficient aircraft and such travel alternatives as remote conferencing. In addition, HP requires its car rental vendors to provide EPA-certified SmartWay vehicles and include hybrid and fuel-efficient vehicles whenever available.

Although net revenues were down in its 2013 fiscal year, which ended in October 2013, HP also reduced operating expenses.

## 15 MCKINSEY & CO.

NEW YORK

**2013 U.S.-BOOKED AIR VOLUME:** \$195 million

**CONSOLIDATED GLOBAL AGENCY:** American Express

*BTN* estimates that management consulting firm McKinsey in 2013 increased its U.S.-booked air volume year over year.

The firm, one of the largest privately owned organizations in the world, operates more than 90 offices in 50 countries and has approximately 17,000 employees. McKinsey consolidates its travel globally through American Express. Among its recent travel management accomplishments is driving strong compliance with meetings policies via strategic meetings management strategies. Its meetings are managed through a meetings department website that lays out planning parameters. For example, the firm has a policy that disallows meetings in locations in which it does not have an office unless it is for client purposes.

## 16 ROYAL DUTCH SHELL

THE HAGUE, THE NETHERLANDS

**2013 U.S.-BOOKED AIR VOLUME:** \$191 million

**PRINCIPAL SUPPLIERS:** United; Hilton, InterContinental, Starwood; Avis, Enterprise; KDS; SAP

**CONSOLIDATED U.S. AGENCY:** Carlson Wagonlit Travel

*BTN* estimates that global petrochemical company Royal Dutch Shell spent \$191 million in U.S.-booked air travel in 2013.

Shell's revenues declined 3 percent year over year in 2013, and income declined 39 percent. As such, the company in its annual report said it plans to cut capital spending significantly this year "as we moderate our growth ambitions and strive to improve our free cash flow and returns."

Shell's employee count increased to 92,000 compared with 87,000 in 2012, and the company operates in more than 90 countries.

Driver safety has been one area of focus at Shell, whose employees and contractors drive a total of more than 680 million miles each year on company business. This includes driver safety training, pushing for lower-risk modes of transportation and providing onsite accommodations to employees to reduce the need for road travel.

## 17 BANK OF AMERICA

CHARLOTTE, N.C.

**2013 U.S.-BOOKED AIR VOLUME:** \$188 million

**PRINCIPAL SUPPLIERS:** Sabre GetThere

**CONSOLIDATED U.S. AGENCY:** American Express

Bank of America increased its U.S.-booked air volume \$8 million year over year in 2013, according to a *BTN* estimate.

U.S. travelers book through GetThere, and the supplier this year honored the firm as a best practitioner.

Bank of America, which operates in more than 40 countries, reported \$89.8 billion in revenue in 2013, up 6.6 percent compared with the prior year, and net income more than doubled to \$11.4 billion. The firm reported 242,000 full-time employees as of the end of 2013, down from 267,000 at the end of the prior year.

## 18 APPLE

CUPERTINO, CALIF.

**2013 U.S.-BOOKED AIR VOLUME:** \$180 million

**CONSOLIDATED U.S. AGENCY:** BCD Travel

Apple for several years has maintained its status as an ARC-accredited Corporate Travel Department. BCD Travel serves the technology giant as its consolidated U.S. agency and in several other countries. *BTN* estimates Apple's 2013 U.S.-booked air volume rose \$6 million from the previous year.

Apple's total sales in its fiscal year ending Sept. 28, 2013, rose more than 9 percent to \$171 billion from the previous year.

The company's selling, general and administrative expenses during the fiscal year increased about 8 percent to \$10.8 billion, spurred in part by further expansion of Apple's retail sector, and the hiring of new employees was partially offset by decreased spending on professional services.

At the end of that fiscal year, Apple reported 80,300 full-time-equivalent employees, up from 72,800 the year before.

Apple's guidelines on daily meal expenses for business travelers "vary worldwide," according to a business conduct policy the company updated in December 2013.

## 19 MICROSOFT

REDMOND, WASH.

**2013 U.S.-BOOKED AIR VOLUME:** \$179 million

**2013 COMPANYWIDE AIR VOLUME:** \$340 million

**2013 U.S. T&E:** \$450 million

**2013 COMPANYWIDE T&E:** \$800 million

**PRINCIPAL SUPPLIERS:** Delta; American Express

**CONSOLIDATED GLOBAL AGENCY:** American Express

Microsoft's U.S.-booked air volume for its fiscal year ending June 30, 2013 was \$179 million, down slightly from the prior year, and companywide air volume also dropped a few percentage points.

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For the current fiscal year, the volumes are expected to rise to \$192 million and \$360 million, respectively.

Total companywide T&E spending in fiscal 2013 generated by Microsoft's 60,000 business travelers increased about 10 percent to \$800 million.

American Express continues to serve as the company's consolidated global agency, including handling of about 98 percent of Microsoft's U.S.-based travel volume.

Microsoft in 2013 developed and launched a call center using voice over IP to service more than 60 percent of its travelers. It's based on the company's Lync videoconferencing and instant messaging system. To improve the booking process, Microsoft continued to work on including in travel requests through its Outlook calendar application such details as meeting time and location, functionality that's expected to be available during 2015.

Travel requests through Outlook are part of the company's exploration of a trip-planning tool that also may include predictive modeling to anticipate travelers' preferred flight options. Once built, it's a system that may be made available through other industry vendors.

For 2014, the company's goals include finalizing requests for proposals and implementing new programs related to online booking and travel agency services. Meanwhile, a key challenge moving forward is managing the merger of Microsoft and Nokia, completed in April 2014.

Microsoft travelers in the United States continue to use Amex corporate cards in an individual bill/individual pay configuration. The primary expense reporting system inside and outside the United States is Microsoft's own MS Dynamics Expense system.

## 20 GOOGLE

**MOUNTAIN VIEW, CALIF.**

**2013 U.S.-BOOKED AIR VOLUME:** \$170 million

**PRINCIPAL SUPPLIERS:** Concur

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

Making its debut in *BTN's* Corporate Travel 100, Google's 2013 U.S.-booked air volume soared 21 percent year over year. Another roughly 20 percent jump is expected this year. The percentage increase from 2012 to 2013 about matched Google's overall growth in revenues during 2013, which increased about 19 percent to \$59.8 billion. That revenue growth has continued in 2014 with a second-quarter figure of \$16 billion, up 22 percent year over year.

Google's travel program has been seen by some as the model of new-age travel management. Though traditional guidelines and structures are in place, including servicing by Carlson Wagonlit Travel, the program is not mandated and allows the company's 40,000 travelers to book through whichever means they prefer. For example, Concur has identified Google as a user of its open-booking service, now called TripLink, which captures information from booking made in channels outside the confines of a traditional managed travel program.

Google also uses an internally developed system that offers trav-

elers incentives to save money by letting them reuse the difference between what they spend and benchmarked rates. The company helped Concur develop a similar rewards-based program based on price benchmarks.

As a global leader in Internet services and products, Google continues to grow. In recent financial information, the company reported that it employs more than 52,000 people and added that "we expect to continue to hire aggressively for 2014." Acquisitions, according to the company, "will also remain an important component of our strategy and use of capital."

Google for 2013 reported that 55 percent of revenue was generated outside the United States.

## 21 WORLD BANK GROUP

**WASHINGTON, D.C.**

**2013 U.S.-BOOKED AIR VOLUME:** \$167.2 million

**2013 COMPANYWIDE AIR VOLUME:** \$288.1 million

**2013 U.S. T&E:** \$256.5 million

**2013 COMPANYWIDE T&E:** \$495.7 million

**PRINCIPAL SUPPLIERS:** Air Canada, Air France/KLM, All Nippon Airways, American Airlines, Austrian Airlines, Avianca-Taca, British Airways, Delta, Iberia, Korean Air, Lufthansa, Qatar Airways, United; Hilton, Marriott; Amadeus e-Travel Management; SAP; AirPlus, Diners Club

**CONSOLIDATED U.S. AGENCY:** American Express

The World Bank Group spent 2013 laying the groundwork for big travel program changes planned for fiscal 2014 and beyond. Completed goals this year included implementation of Trondent's online traveler profile system and, in the United States, the Amadeus e-Travel Management online booking system and Sabre TripCase itinerary management tool. The organization also intends to roll out globally the HRS online hotel reservations portal, modify its pre-trip approval process, negotiate new global airline contracts and conduct bids for global and regional travel management company services.

Currently, American Express handles all of World Bank Group's U.S.-based travel while BCD Travel provides service in 16 countries across the organization's East Asia/Pacific region. Overall, the World Bank Group fields about 10,000 employees across 120 offices worldwide, with 95 percent of global air volume generated from international trips.

The World Bank Group in 2014 also planned travel policy modifications, including a requirement to use economy class for all flights shorter than five hours and reduced daily per diems in cases where hotels offer complimentary breakfast.

The organization in 2013 generated a U.S.-booked air volume slightly below that of the previous year and expects a larger reduction this year, to about \$160 million. Globally, air volume increased marginally to just more than \$288 million. In terms of total T&E, the U.S. and companywide figures each increased about 5 percent from 2012 levels.

Though World Bank Group lists Hilton and Marriott as preferred

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SA054	ANGOLA	BOARDING
SA048	ZAMBIA	BOARDING
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lodging chains, it also uses lots of independent hotels.

In the United States, Diners Club provides commercial cards, which for airline tickets are configured in a central bill/central pay model. In the East Asia/Pacific region, a similar setup is furnished by AirPlus. SAP provides expense management automation inside and outside the United States.

A source of financial and technical assistance to developing countries, the World Bank Group measures its greenhouse gas emissions produced from global facilities, major meetings and air travel, and seeks to reduce and offset. In fiscal 2012, those areas generated about 174,000 metric tons of carbon dioxide equivalent.

## 22 JOHNSON & JOHNSON

**NEW BRUNSWICK, N.J.**

**2013 U.S.-BOOKED AIR VOLUME:** \$165.3 million

**2013 COMPANYWIDE AIR VOLUME:** \$298.6 million

**2013 U.S. T&E:** \$399.5 million

**2013 COMPANYWIDE T&E:** \$866 million

**PRINCIPAL SUPPLIERS:** Delta, United, US Airways; Hilton, Hyatt, Marriott; Avis, Budget; Amadeus e-Travel, Sabre GetThere; IBM; American Express

**CONSOLIDATED GLOBAL AGENCY:** American Express

Johnson and Johnson's U.S.-booked air volume in 2013 rose modestly from the prior year and is expected to increase about 5 percent this year to \$174 million. The multinational medical devices, pharmaceutical and consumer goods manufacturer also spent slightly more on total U.S. T&E, which rose a few million to just under \$400 million. Globally, air volume and total T&E spending also each rose a few percentage points.

There have been no recent notable travel policy changes, but the company's travel department during 2013 created a T&E dashboard for global stakeholders, met a supplier diversity target and piloted a pre-trip auditing program related to lowest-logical fare and advance-purchase airline bookings. For the current year, J&J is implementing globally where available the pre-trip tool furnished by American Express. The company also is applying hotel rate caps globally where applicable and aiming to complete a travel agency request for proposals.

Currently, American Express handles 100 percent of the company's U.S.-based volume (which accounts for just over half of J&J's global air spending). Amex also is the consolidated agency for travel operations outside the United States. Carlson Wagonlit Travel services some of J&J's meetings management needs.

The company uses the Sabre GetThere online booking tool inside the United States, where about 70 percent of 2013 tickets were booked online (85 percent of which required no manual intervention). GetThere and the Amadeus e-Travel booking tool are used in locations outside the United States.

Johnson and Johnson's U.S. travelers use American Express corporate cards in an individual bill/central pay configuration. Expense management software both inside and outside the United States is provided by IBM.

The company during 2013 experienced operational sales growth across its key segments of pharmaceuticals (12 percent), medical devices and diagnostics (6.1 percent) and consumer (2.8 percent). For the second quarter of 2014, J&J reported \$19.5 billion in sales, up 9.1 percent year over year. Domestic sales growth (14.9 percent) outpaced international sales growth (4.4 percent).

The company now encompasses 275 subsidiaries in 60 countries and fields a global workforce of more than 128,000 people, 45,000 of which are travelers.

Global carbon dioxide emissions generated by employee business travel during 2013 amounted to 229 thousand metric tons, up about 2 percent from the prior year but lower than the 2011 total.

## 23 KPMG

**MONTVALE, N.J.**

**2013 U.S.-BOOKED AIR VOLUME:** \$155 million

**CONSOLIDATED U.S. AGENCY:** American Express

KPMG in its 2013 fiscal year, which ended Sept. 30, 2013, reported \$23.4 billion in global revenue, up 3.7 percent in local currency terms year over year. *BTN* estimates the professional services giant's 2013 U.S.-booked air increased as well.

The Big Four auditor is in the midst of a significant carbon-reduction initiative, with a goal of reducing its overall carbon footprint per full-time-equivalent employee 10 percent by the end of calendar year 2015 as compared to 2011 levels. To accomplish that, KPMG has pushed remote conferencing as an alternative to travel and some meetings. The company also includes in its meetings requests for proposals that venues identify their practices for energy conservation and water efficiency.

## 23 SIEMENS

**MUNICH, GERMANY**

**2013 U.S.-BOOKED AIR VOLUME:** \$155 million

**CONSOLIDATED U.S. AGENCY:** BCD Travel

*BTN* estimates that Siemens spent \$155 million on airline tickets at the U.S. point of sale in calendar 2013, down \$15 million from 2012.

In 2013, the company became fully operational in approaching travel from a North American regional basis, using the same strategy, tools and travel providers in the United States, Canada and Mexico.

In the United States and Canada, meetings, which already had been consolidated from both end-user reporting and strategic procurement perspectives, and travel work hand-in-hand at Siemens. The company next year will begin meetings consolidation efforts in Mexico.

Online booking adoption for U.S.-booked tickets in 2013 was 95 percent. An unused ticket-exchange program with high reuse and low spoilage contributed to achieving airline ticket savings.

A major focus of the North America Mobility Services Group in 2013 and 2014 has been an effort called "Shake It Up," a compre-

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hensive review and update of all processes, reporting and communications to ensure the continuous relevance, ease and transparency to its travelers, stakeholders and management.

In addition, the company has been evaluating and moving forward with extending its platform and program structure for managing meetings and events to encompass its largest two markets: Germany and the United States.

## 25 ROCHE

**BASEL, SWITZERLAND**

**2013 U.S.-BOOKED AIR VOLUME:** \$150 million

**PRINCIPAL SUPPLIERS:** American Airlines, British Airways, Delta, Lufthansa, United; Hyatt, Joie de Vivre Hotels, Kimpton; Sabre GetThere

**CONSOLIDATED GLOBAL AGENCY:** BCD Travel

Swiss pharmaceutical and healthcare diagnostics company Roche's U.S.-booked air volume in 2013 increased \$5 million from 2012 and is projected to increase about the same amount this year.

The firm last year began to implement BCD Travel as its consolidated global travel management company; BCD Travel already had been providing travel management services for Roche's U.S. travelers. This year, the company's goals include finalizing TMC arrangements and a global reporting initiative.

In the United States, the firm—including the Genentech subsidiary—uses the GetThere self-booking system furnished by Sabre. Roche also continues to develop a virtual meetings policy.

Principal suppliers include the American Airlines/British Airways joint business, as well as Delta's and United/Lufthansa's joint ventures. Ground transportation services are provided by Dav El Chauffeured Transportation Network (now owned by Marcou Transportation Group).

Describing itself as the "world's largest biotech company," Roche employs more than 85,000 people in 150 countries, about 10,000 of which are travelers. For the first half of 2014, group sales increased 5 percent at constant exchange rates.

## 26 CHEVRON

**SAN RAMON, CALIF.**

**2013 U.S.-BOOKED AIR VOLUME:** \$147 million

**2013 COMPANYWIDE AIR VOLUME:** \$319 million

**2013 U.S. T&E:** \$283 million

**2013 COMPANYWIDE T&E:** \$402.5 million

**PRINCIPAL SUPPLIERS:** Delta, Singapore, United; Hilton, Hyatt, Marriott; Avis, Budget; Concur Travel; IBM; JPMorgan Chase

**CONSOLIDATED GLOBAL AGENCY:** Carlson Wagonlit Travel

Energy giant Chevron during 2013 achieved several travel management accomplishments, including a travel management company request for information, an expense system request for proposals that resulted in a recently signed deal with Concur, car rental benchmarking and contract renegotiation, and a rollout of the

CWT To Go and Concur mobile apps.

In early 2014, the company updated its global policy.

Refreshed procedures and guidelines are meant to provide travelers more direction to make stronger, cost-effective purchasing decisions. More importantly, the travel policy now has a greater focus on traveler safety, including stronger language regarding booking through the preferred travel management company or online booking tool. Chevron also is suggesting such cost-saving purchasing behaviors as using restricted airfares and promoting trip avoidance when remote conferencing alternatives are suitable. Policy updates are being communicated to travelers and traveler arrangers through webinars and in-person presentations.

For the current year, the company continues to focus on traveler safety and satisfaction, and creating value while reducing operating costs. That includes emphasizing compliance and utilizing technology, including the Concur Travel online booking system and Carlson Wagonlit Travel's Program Messenger tool. Chevron's travel team also is providing to management more detailed compliance and missed-savings reports.

Travel within the United States and in other locations is consolidated with Carlson Wagonlit Travel. Chevron's travelers use Concur for self-booking both inside and outside the United States. Within the United States, about 80 percent of tickets issued were booked through the tool. Of those, 79 percent were touchless, requiring no agent assistance.

In the United States, JPMorgan Chase provides commercial cards that Chevron's travelers use in an individual bill/individual pay setup. For now, IBM provides expense management automation both inside and outside the United States, though Chevron will continue to work to implement the Concur Expense system.

Generated by about 17,200 worldwide travelers, companywide air volume grew about 9 percent in 2013. More specifically, U.S.-booked air volume in 2013 jumped 15 percent to \$147 million but is projected to fall back about \$12 million this year. Companywide T&E of \$402.5 million was about 6 percent higher.

Chevron's global workforce is nearly 65,000. In the second quarter of 2014, total revenue rose slightly to \$56 billion and earnings improved about 6 percent to \$5.7 billion. Chairman and CEO John Watson in August said the company aims by 2017 to increase production 20 percent.

## 27 NOVARTIS

**BASEL, SWITZERLAND**

**2013 U.S.-BOOKED AIR VOLUME:** \$135.8 million

**PRINCIPAL SUPPLIERS:** American, Delta, United; Hilton, Marriott, Starwood; Enterprise, Hertz, National; Sabre GetThere, Traveldo; Concur Expense, SAP; JPMorgan Chase

**CONSOLIDATED GLOBAL AGENCY:** HRG

Swiss pharmaceutical company Novartis' U.S.-booked volume for 2013 was \$135.8 million, an increase from 2012.

Last year also saw Novartis launch its global airline bid. While the pharmaceutical company uses GetThere for bookings in the United

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States, outside of the country it uses Traveldo.

For 2014, Novartis has more than 200 projects in clinical development. It also plans to focus on video- and teleconferencing to substitute for internal travel.

Concur is Novartis' expense provider in the United States, but it uses SAP outside of the country.

Novartis' 2013 net sales increased 2.1 percent to \$57.9 billion.

## 28 UNITED TECHNOLOGIES CORP.

**HARTFORD, CONN.**

**2013 U.S.-BOOKED AIR VOLUME:** \$133.1 million

**2013 COMPANYWIDE AIR VOLUME:** \$162.1 million

**2013 U.S. T&E:** \$340 million

**2013 COMPANYWIDE T&E:** \$418.5 million

**PRINCIPAL SUPPLIERS:** Delta, United, US Airways; Hilton, Marriott, Starwood; Avis; Concur Travel, Amadeus e-Travel; SAP; Citi Visa

**CONSOLIDATED GLOBAL AGENCY:** American Express

Since acquiring Charlotte, N.C.-based aerospace manufacturing company Goodrich Corp. in 2012, industrial products conglomerate and military contractor United Technologies Corp. has been examining and integrating various aspects of Goodrich's travel program and policies. Many of the policy changes implemented in 2012 led to savings and efficiencies in 2013.

UTC decreased its 2013 U.S.-booked air volume about 10 percent from \$147.6 million in 2012, due in part to a new policy that restricts business class to flights of 12 hours or longer, up from six hours in a previous policy. As a notable percentage of UTC's flights are more than six hours but less than 12 hours, the policy change resulted in a significant reduction in overall air travel spend.

UTC in August 2013 completed a corporate card request-for-proposal process with American Express and Citibank, with the latter signing a contract. UTC in January 2014 completed a U.S. rollout of the card and is nearing completion in Europe, the Middle East and Africa.

Standardizing travel management company service is the last piece of the Goodrich acquisition puzzle, and UTC plans to complete a full-bid TMC RFP by the end of 2014. It previously integrated Goodrich's air, car and hotel programs.

## 29 PROCTER & GAMBLE

**CINCINNATI**

**2013 U.S.-BOOKED AIR VOLUME:** \$130 million

**PRINCIPAL SUPPLIERS:** Delta, United; Hilton, InterContinental, Marriott, Starwood, Wyndham; Enterprise, National

**CONSOLIDATED U.S. AGENCY:** Egencia

BTN estimates consumer goods producer Procter & Gamble spent \$130 million in U.S.-booked air travel as the company seeks to tighten up its operations.

Egencia has served as P&G's U.S. travel management company since 2010, and the company last year worked to improve online

booking through the agency. HRG handles a considerable amount of P&G's volume outside the United States, although the company does not have a consolidated global agency.

P&G uses Cvent for meetings management services and signed a multiyear renewal with the firm in the third quarter of 2013.

The company's travel volume could soon decline. This summer, P&G announced it would eliminate up to 100 of its brands, representing \$8 billion in annual sales, to focus on 70 to 80 of its strongest brands. During the past two years, P&G's total employee count decreased from 126,000 in 2012 to 118,000 this year.

P&G's net sales in fiscal 2014, which ended in June, increased 0.5 percent year over year to \$83.1 billion. Net earnings increased 2.9 percent to \$11.6 billion.

## 30 WALT DISNEY

**BURBANK, CALIF.**

**2013 U.S.-BOOKED AIR VOLUME:** \$128.5 million

**2013 COMPANYWIDE AIR VOLUME:** \$149.5 million

**2013 COMPANYWIDE T&E:** \$227.9 million\*

**PRINCIPAL SUPPLIERS:** Delta, United, US Airways; Hilton, Marriott, Starwood; Enterprise, Hertz, National; Sabre GetThere; SAP; Citi Visa

**CONSOLIDATED U.S. AGENCY:** HRG

\* Not including meals or entertainment

Walt Disney's 2013 U.S.-booked air volume increased about 3 percent year over year and in 2014 is expected to increase nearly 7 percent.

Disney in 2013 refined its travel policy by limiting premium-class travel. Using proprietary technology, the entertainment and media company improved certain processes, including auto-ticketing and quality control, which allowed for improved efficiencies and timeliness.

While Disney uses HRG in the United States, Asia/Pacific and Australia regions, it uses BCD Travel in Japan, Latin America and Europe, the Middle East and Africa.

The firm uses SAP for expense management globally; it previously used both SAP and Concur outside of the United States. The company uses GetThere for online booking, the method through which 95 percent of its 2013 U.S. bookings were made.

For the nine months ending June 28, 2014, Walt Disney reported \$36.4 billion in revenue, a 9 percent increase year over year.

## 31 ABBOTT LABORATORIES

**ABBOTT PARK, ILL.**

**2013 U.S.-BOOKED AIR VOLUME:** \$126 million

**PRINCIPAL SUPPLIERS:** Concur

**CONSOLIDATED U.S. AGENCY:** American Express

Pharmaceutical and health care supplier Abbott Laboratories last year expanded its global presence, with about 70 percent of its sales in 2013 outside of the United States and increasing sales shares in emerging markets. This year it continues on that path, opening

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to contact Roadside Assistance with a single click. And Avis was the first to offer a sophisticated data reporting tool that gives travel managers insights they need to manage their programs.

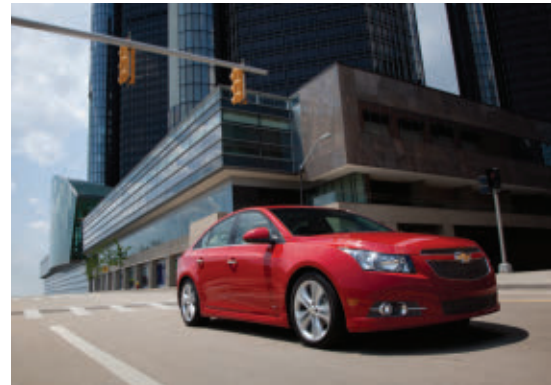
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manufacturing plants in China and India. Comparatively, less than a decade ago most of its business was in the United States.

*BTN* estimates Abbott in 2013 increased its U.S.-booked air volume slightly to \$126 million. Concur handles both online booking and expense for Abbott.

Abbott traveling employees use an online toolkit, Cultural Navigator, to learn about local business practices, management tools and customs when traveling internationally. About 2,000 employees actively used the tool in 2013.

Abbott's net sales increased 1.6 percent year over year to \$21.8 billion in 2013. Net earnings declined 56.8 percent to \$2.6 billion.

## 32 RAYTHEON

**WALTHAM, MASS.**

**2013 U.S.-BOOKED AIR VOLUME:** \$121 million

**CONSOLIDATED U.S. AGENCY:** BCD Travel

Defense and aerospace systems supplier Raytheon faced a challenging domestic business environment in 2013, including a U.S. federal government shutdown and sequestration spending cuts. As such, *BTN* estimates the company reduced its U.S.-booked air volume to \$121 million.

Besides the domestic challenges, Raytheon sought to reduce greenhouse gas emissions related to employee business travel and other key logistic suppliers. In 2013, the company estimated 154,000 metric tons of emissions from those sources, representing a reduction of 16 percent since 2011.

BCD Travel is Raytheon's consolidated U.S. agency, and the travel management company also handles a significant portion of its business outside the United States.

Travel health counseling is among the services offered by the company's 29 onsite health centers. Travelers receive counseling both before and after traveling to countries with elevated health risks, a practice that earned Raytheon "best practice" honors from California's Division of Occupational Safety and Health.

Raytheon reported about 63,000 employees as of the end of 2013, down from 67,800 in 2012. Net sales in 2013 declined 2.9 percent to \$23.7 billion.

## 33 CITIGROUP

**NEW YORK**

**2013 U.S.-BOOKED AIR VOLUME:** \$116 million

**2013 COMPANYWIDE AIR VOLUME:** \$257 million

**2013 U.S. T&E:** \$260 million

**2013 COMPANYWIDE T&E:** \$550 million

**PRINCIPAL SUPPLIERS:** American, Delta, United; Hilton, InterContinental, Marriott, Starwood; Avis, Hertz; Concur Travel; Concur Expense; Citi MasterCard

**CONSOLIDATED GLOBAL AGENCY:** Carlson Wagonlit Travel

Citigroup had a busy 2013. The bank prepared for a global airline request for proposals, which now is nearing completion, with the

expectation of a November 2014 implementation. The bank in 2013 also initiated an electronic auction for long-term-stay providers.

Citi's 2013 U.S.-booked air volume decreased from \$126 million in 2012, according to a *BTN* estimate.

Citi regularly reviews its travel policy and last year further streamlined its travel-approval process to simplify the managerial levels responsible for approving exceptions.

The bank also eased a policy mandate regarding advanced purchase of airfares as traveler behavior changed and compliance increased. That policy now is highly recommended, instead of mandated. Citi now reimburses 100 percent of noncompliant expenses as long as the traveler has the proper management approvals and documents. Previously, it reimbursed 80 percent of noncompliant expenses.

The bank continued its efforts to drive policy compliance through training and communication with representatives of each of Citi's business units on any updates or changes to policy.

Carlson Wagonlit Travel services about 90 percent of Citi's locations outside of the United States, with regional agencies handling about eight out of 99 countries. Citi in 2013 continued an effort to globally consolidate with CWT into multi-service and low-cost centers.

As Citi's travel program is fairly mature, the bank in 2014 will work with suppliers to find innovative solutions for operations and reporting, while maintaining a quality travel experience.

## 34 THE GOLDMAN SACHS GROUP

**NEW YORK**

**2013 U.S.-BOOKED AIR VOLUME:** \$113 million

**2013 COMPANYWIDE AIR VOLUME:** \$206 million

**2013 U.S. T&E:** \$209 million

**2013 COMPANYWIDE T&E:** \$545 million

**PRINCIPAL SUPPLIERS:** American, British Airways, Cathay Pacific; Hilton, Hyatt, Ritz-Carlton; Avis, Hertz, National; Sabre GetThere; American Express

**CONSOLIDATED GLOBAL AGENCY:** American Express

Investment bank Goldman Sachs in 2013 expanded use of its online booking tool and focused on optimizing air and hotel bookings. The bank tightened its air policies and strengthened its ground transportation policies, with a particular focus on Asia. In 2014, Goldman Sachs will strive to reduce ground transportation costs.

The bank also will work on bringing more cost awareness, focusing on managing demand and accountability at the individual business level by implementing such education tools as social networks. It also will establish trip IDs to have better insight into total-trip cost.

U.S.-booked air volume in 2013 increased from \$103 million in 2012.

The firm uses a proprietary internal expense system, and American Express acts as Goldman Sachs' card provider and travel management company.

The firm uses GetThere for online booking.

# United Airlines

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Ensuring clients have access to the world's largest business markets is a priority for United Airlines®. Serving more than 350 destinations worldwide with over 4,500 daily flights, United has the most extensive route network of any airline. The carrier can take business travelers nearly anywhere they need to go, and if United doesn't fly there, its Star Alliance partners can connect travelers to countries around the world.

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United delivers an enjoyable and rewarding experience from start to finish.

## A World-Class Network

This year, United expanded its global reach with new service to 32 domestic and 16 international destinations. Further strengthening its position as the leading carrier to Asia, United introduced nonstop service between San Francisco and both Taipei, Taiwan, and Chengdu, China.

In October, United will offer business travelers convenient access to downtown Tokyo with new service between San Francisco and Tokyo's Haneda Airport and will start service between Los Angeles and Melbourne, Australia, with the new Boeing 787 Dreamliner. At the end of the year, the airline will launch the first ever nonstop service between Houston and Santiago, Chile.

## A Business Traveler-Friendly Fleet

In 2014, United has taken delivery of 35 Boeing 737 and 787 aircraft and 32 new Embraer 175 aircraft for United Express®. United became the first North American carrier to take delivery of the Boeing 787-9 (the first of 26 on order), a stretched version of the 787-8 that enables the airline to accommodate more customers for longer distance flights. The 787-9 builds on the Dreamliner's fuel efficiency and customer comfort. Last year, United's customers gave the 787 the highest customer satisfaction scores of any aircraft in the United fleet. Over the next few years, United



will take delivery of 35 additional mainline aircraft, including the new Airbus A350.

## Delivering Flyer-Friendly Experiences at the Airport and in the Air

United's investments this year stretch beyond its unparalleled network of global business markets and new aircraft. United asked its customers what they needed to make their lives easier and the airline is responding to those needs with new and enhanced products and services.

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**35 CISCO SYSTEMS****SAN JOSE, CALIF.****2013 U.S.-BOOKED AIR VOLUME:** \$111 million**CONSOLIDATED U.S. AGENCY:** American Express

*BTN* estimates Cisco's U.S.-booked air volume last year rose from an estimated \$95 million in 2012.

The company continues to emphasize remote conferencing, including its own TelePresence technologies and WebEx desktop tools, to replace some business trips.

"Worldwide utilization of general-use immersive Cisco TelePresence units has increased slightly from last year, from just under 50 percent to 56 percent, both percentages based on an eight-hour day," according to the company's Corporate Social Responsibility report for its 2013 fiscal year, which ran through July 2013.

In February 2013 the company announced the goal to reduce by fiscal year 2017 corporate air travel emissions by 40 percent from 2007 levels.

"Replacing business air travel with remote collaboration requires more than just installing more technology," according to the company. "Business processes, management practices and culture need to be adapted to take full advantage of these new network technologies."

Meanwhile, the company early last year expressed a desire to move away from marketshare-based agreements with airlines and toward revenue-based contracts as it entered renegotiations with major carriers.

Fiscal 2013 revenue rose 5.5 percent from 2012 to \$48.6 billion. Cisco in August 2013 disclosed a plan to cut headcount by 4,000, representing about 5 percent of its workforce worldwide. The cuts were to begin taking hold this year.

**36 NORTHROP GRUMMAN****FALLS CHURCH, VA.****2013 U.S.-BOOKED AIR VOLUME:** \$109.7 million**2013 COMPANYWIDE AIR VOLUME:** \$110.7 million**2013 U.S. T&E:** \$257.3 million**2013 COMPANYWIDE T&E:** \$258.7 million

**PRINCIPAL SUPPLIERS:** American, Delta, United; Hilton, InterContinental, Marriott; Avis, Budget; Concur Travel; Concur Expense; JPMorgan Chase Visa

**CONSOLIDATED U.S. AGENCY:** BCD Travel

Due in part to the U.S. federal government sequestration spending cuts, defense contractor Northrop Grumman's 2013 U.S.-booked air volume decreased by almost 8 percent year over year from \$118 million.

The company now is aggressively looking to expand business into more countries around the world, and is accordingly expanding its travel program globally. Northrop in 2014 plans to offer travel management services through BCD Travel in more countries.

In 2013, Northrop Grumman transitioned to Concur Travel from GetThere for online booking services. It also instituted more aggressive corporate card processes by actively collecting unpaid card balances. Similarly, the defense contractor this year also will work to capture international rogue spending through policy edicts and the establishment of a global card program.

Northrop Grumman also uses Concur for expense management in the United States.

**37 PEPSICO****PURCHASE, N.Y.****2013 U.S.-BOOKED AIR VOLUME:** \$105 million**CONSOLIDATED U.S. AGENCY:** American Express

U.S.-booked air volume for PepsiCo in 2013 declined nearly 5 percent from 2012 levels to \$105 million, according to *BTN* estimates.

Full-year 2013 revenue for the multi-brand beverage and snack food conglomerate rose a modest 1 percent to \$66.4 billion from the prior year.

Operating in more than 200 countries and territories, the company at year-end 2013 employed about 274,000 people worldwide, with 106,000 of them based in the United States. That is a decline from the 278,000 worldwide employees counted at year-end 2012.

Headcount is poised for further trimming, as the company this year extended through 2019 a "\$1 billion annual productivity savings" target that included reduced employee levels.

**38 ELI LILLY AND CO.****INDIANAPOLIS****2013 U.S.-BOOKED AIR VOLUME:** \$100 million**2013 COMPANYWIDE AIR VOLUME:** \$140 million**2013 U.S. T&E:** \$110 million**2013 COMPANYWIDE T&E:** \$300 million

**PRINCIPAL SUPPLIERS:** SkyTeam, Star Alliance, US Airways; Marriott, Starwood; Enterprise Holdings; Concur Travel, Sabre GetThere; U.S. Bank Visa

**CONSOLIDATED GLOBAL AGENCY:** Carlson Wagonlit Travel

Eli Lilly and Co.'s revenue flattened in 2013, due in part to patent expirations, and its 2013 U.S.-booked air volume decreased about 25 percent year over year.

U.S. T&E expenditure for 2013 fell 9 percent year over year, due in part to a 2012 edict on reducing travel. The company will continue to monitor travel expenditure as it pushes to release more products into the market.

Due to Eli Lilly's implementation of a global travel program, the pharmaceutical company succeeded in better data collection, which further helped with duty of care, negotiations and providing better service to travelers.

Eli Lilly uses Concur Travel for bookings within the United States and GetThere outside the United States. It previously was an IBM GERS expense management customer.

# CSI globalVCard

Virtual payment is making waves in the corporate travel industry—for good reasons. CSI's globalVCard is leading the charge.

**C**SI Enterprises, a private company founded in 1989, provides innovative payment solutions to some of the world's leading brands. The company launched its globalVCard virtual card brand in 2009 and has recently configured its product to address serious payment pain points for managed travel programs—specifically, program compliance, payment security and back-end reconciliation.

## The Virtual Card Solution

The globalVCard travel solution enables a single-use virtual card that works in conjunction with a corporation's preferred travel management company. Like a lodge card or central bill product, the TMC controls access to the card, ensuring that employees book their business travel through the agency of record. Unlike the central bill card, however, the TMC generates virtual cards per transaction and CSI has created an enhanced

### WITH TMCs IN MIND

GlobalVCard offers TMCs a competitive solution that keeps them ahead of the industry when it comes to serving their corporate clients. Partnering with CSI Enterprises, TMCs have the opportunity to address multiple travel payment pain points with a clean, efficient and innovative solution—and, at the same time, forge deeper, more valuable client relationships. As the reality and benefits of virtual cards permeate the market, more clients will ask for turnkey solutions. TMCs cannot afford to be left behind.

API for travel companies that attaches critical data to each transaction—including, booking number, reference number, employee name, employee number, job number and more—resulting in significantly enhanced reporting that goes beyond even what is provided by many corporate card providers.

## Addressing Travel Payment Pain Points

- **Travel Policy Compliance** – Because virtual cards are generated and maintained at the TMC level, employees are required to book their travel via the agency of record. Doing so controls for travel policy compliance at the point of purchase.
- **Reconciliation** – With the enhanced API configured for travel calls, globalVCard offers all of the data needed to tie each travel transaction back to the employee, corporate division, project code—or myriad other categories—for easy reconciliation. This contrasts with the more conventional central bill product that has limited details for reconciliation and has been a challenge for travel and finance managers.
- **Security** – Because single-use virtual cards expire immediately after the transaction is complete, corporations can rest easier about breaches to supplier data bases and other areas of security concern. The single-use configuration also prevents travelers from making unauthorized changes and/or upgrades to their airline tickets, hotel rooms or car rentals.

- **Hotel Direct Bill** – Hotel direct bill has been a perennial challenge for many companies, with failures in paperwork

transfer resulting in long wait times and uncertainty for the business traveler at check in. CSI's globalVCard integrates an automated fax and confirmation process for hotel direct bill procedures that alleviates these hassles.

## The Future Of Corporate Payment

According to CSI, the growth trajectory for globalVCard has been swift over the past five years across all industry types. With new enhancements and integrations for the managed travel industry, applications for the product are numerous—whether the travel program requires a full payment solution transformation or travel or finance managers need a targeted solution for a particular group of travelers, such as contractors or those who are not eligible for corporate cards. With globalVCard, corporations have the policy control of central bill with rich reporting and reconciliation ease. Add in the enhanced security, and travel payment has a true innovation.

## CONTACT

**For more information about CSI globalVCard, visit <http://www.csiglobalvcard.com>.**



**39 FEDEX**

**MEMPHIS**

**2013 U.S.-BOOKED AIR VOLUME:** \$98 million  
**CONSOLIDATED U.S. AGENCY:** BCD Travel

U.S.-booked air volume for shipping and business logistics supplier FedEx last year fell to \$98 million, *BTN* estimates. For its 2013 fiscal year which ended May 31, 2013, the company reported a 10 percent reduction in employee business air travel emissions, as measured by metric tons of carbon dioxide.

For the 12 months ending May 31, 2014, revenue rose 3 percent year over year to \$45.6 billion. During the most recent fiscal year, 3,600 employees departed the company as FedEx completed a voluntary buyout program for select U.S.-based employees. Even so, the company continues to count more than 300,000 employees. FedEx travelers use a self-booking tool furnished by Concur.

**40 CATERPILLAR**

**PEORIA, ILL.**

**2013 U.S.-BOOKED AIR VOLUME:** \$96 million  
**2013 COMPANYWIDE AIR VOLUME:** \$110 million  
**CONSOLIDATED GLOBAL AGENCY:** BCD Travel

Consolidated sales and revenue for construction and heavy equipment manufacturer Caterpillar declined 16 percent year over year in 2013 to \$55.7 billion, due in part to a drop in sales of new mining equipment.

Operating profit in 2013 was \$5.6 billion, a drop from \$8.6 billion year over year.

Additionally, 2013 U.S.-booked air volume declined to \$96 million, compared with \$120 million in 2012. Companywide air volume for 2013 also declined to \$110 million from \$180 million.

Due to restructuring and lower production volumes, 2013 employee headcount at Caterpillar decreased 5.5 percent to 118,500 from 125,300 in 2012.

Caterpillar in 2013 was planning to switch from an in-house expense system to Concur.

**41 COMCAST**

**NEW YORK**

**2013 U.S.-BOOKED AIR VOLUME:** \$95 million  
**CONSOLIDATED U.S. AGENCY:** BCD Travel

Holding a 51 percent stake in NBC Universal since 2011, cable giant Comcast last year took the remaining ownership stake from General Electric for \$16.7 billion. *BTN* estimated NBCUniversal's 2012 U.S.-booked air volume was \$65 million, and the combined company last year is estimated to have spent \$95 million on airfares from the U.S. point of sale.

As of Dec. 31, 2013, the combined company counted 136,000 full-time and part-time employees.

**42 BP**

**LONDON**

**2013 U.S.-BOOKED AIR VOLUME:** \$92.8 million  
**2013 COMPANYWIDE AIR VOLUME:** \$340.3 million  
**PRINCIPAL SUPPLIERS:** Sabre GetThere; IBM Global Expense Reporting Solution; American Express  
**CONSOLIDATED GLOBAL AGENCY:** Carlson Wagonlit Travel

Oil and gas giant BP in 2013 spent \$92.8 million on U.S.-booked airline tickets, down 17.5 percent from 2012. Global air volume in 2013 of \$340 million was down about 10 percent from the year earlier, and the company projects another roughly 10 percent decline during 2014, stemming primarily from reduced travel across the organization.

Last year, the company's travel department progressed on data aggregation efforts and sharpened its focus on traveler well-being. To reduce fatigue and minimize other health risks, BP now requires all employees traveling on flights of at least four hours to use business class.

Goals for the current year include additional technology enhancements, such as those related to mobility tools and big data.

Carlson Wagonlit Travel continues to handle nearly all of the company's global travel, servicing the needs of nearly 40,000 travelers, including the 84 percent of global air volume generated outside the United States.

BP uses the GetThere corporate booking tool furnished by Sabre both inside and outside the United States. Within the United States, GetThere handled 76 percent of the company's 2013 U.S.-booked tickets, 10 percent of which required no agent assistance.

BP also uses the American Express corporate card in an individual bill/individual pay configuration. For expense management, the company uses IBM's Global Expense Reporting Solution both inside and outside the United States.

Overall, the company has nearly 84,000 employees spread across 80 countries. BP in 2013 completed a \$38 billion divestment program and announced plans to divest another \$10 billion in assets by the end of 2015.

**43 BARCLAYS**

**LONDON**

**2013 U.S.-BOOKED AIR VOLUME:** \$87 million  
**CONSOLIDATED U.S. AGENCY:** None, BCD Travel is primary

*BTN* estimates Barclays' 2013 U.S.-booked air volume increased \$17 million from \$70 million in 2012 to \$87 million, reversing two years of reduced air travel expenditures.

Barclays reported companywide travel and accommodation costs of more than \$502 million in 2013, down from more than \$522 million in 2012.

Costs are a key area of focus for Barclays, which remains committed to its "2015 Transform" program cost target of \$27 billion.

The banking and financial service firm last year continued a sus-

# South African Airways

For over 80 years, South African Airways (SAA), Africa's most awarded airline, has been taking business travelers to more places in Southern Africa than any other airline.

**S**AA and its regional partners, South African Express, Mango and Airlink, offer service to over 55 destinations throughout Africa. SAA's expanded route network means greater convenience, with through check-in and baggage handling, affordable fares and a wider choice of flights for business travelers flying to, from and within the African continent.

## Your Partner From The U.S. to Africa

SAA features the most service from the United States to South Africa with daily nonstop service from New York (JFK) and daily direct service from Washington, DC (Dulles) via Dakar to our Johannesburg hub.

Code share agreements with Star Alliance partners United Airlines and Air Canada expand the number of cities in the U.S. and Canada from which to reach the African continent. Additional code share agreements with both JetBlue Airways and US Airways and an interline agreement with Virgin America present even more ways for travelers to connect from cities throughout the U.S. and Canada to flights at SAA's North American gateways.

And, as a Star Alliance member, South African Airways is able to offer business travelers 1,316 destinations in 192 countries and more than 18,500 flights daily. Plus, frequent flyer miles can be earned and redeemed through the United Airlines Mileage Plus or Air Canada Aeroplan frequent flyer programs.

## Serving The Savvy Business Traveler

SAA makes it easy for travelers to arrive refreshed and ready to do business in Africa. With SAA's Premium Business



Class or Economy Class, business travelers will experience on-board amenities that are miles ahead of the competition. SAA's Premium Business Class seat has been awarded a 5-Star sleep rating by SkyTrax™ and features a truly, 180° lie-flat seat with 73-inch pitch, massage function, privacy screen, laptop outlets, warm duvet and fluffy pillows.

Combined with gourmet cuisine, award-winning South African wines, an on-demand entertainment system with an extensive library of blockbuster and classic programming and individual amenity kits, SAA's Premium Business Class service sets the high standard for long-haul international travel.

Economy Class travelers will enjoy legroom of up to 34 inches at every seat. In addition to more space, SAA's Economy Class also offers on-demand audio and video programming at every seat and a selection of freshly prepared meals, complimentary beverage and bar service, and an amenity kit to refresh with during flight.

## Award-Winning Experience

Next time Africa is calling for business, book South African Airways. The airline is the proud recipient and only African carrier to receive a 4-Star rating and Best Airline in Africa award by Skytrax for 12 consecutive years. We look forward to welcoming your travelers aboard with true South African hospitality. There is no better way to travel to Africa, where new business opportunities abound.

## CONTACT

For more information, call  
1-800-722-9675 or visit [www.flysaa.com](http://www.flysaa.com).



**SOUTH AFRICAN AIRWAYS**

A STAR ALLIANCE MEMBER 

tainable travel program inaugurated in 2010 that promotes the use of remote conferencing technologies in lieu of business travel, and encourages the use of rail instead of air travel for applicable shorter trips. The company is committed to reducing its global carbon emissions from travel, buildings and technology 10 percent by 2015 from a 2012 baseline.

The changes helped Barclays reduce its 2013 travel-related carbon emissions by nearly 35,000 metric tons of equivalent carbon dioxide. The 180,352 metric tons of equivalent carbon dioxide attributed to Barclays' business travel in 2013 reflects a reduction of nearly 17,000 tons used for business travel by company car fleets in the United Kingdom and South Africa and global flights, rail, taxis and other ground transportation.

Barclays has 140,000 employees, but plans this year to cut up to 12,000, including 7,000 in the United Kingdom. The company eliminated 7,650 jobs in 2013.

Barclays uses meetings management technology supplier Cvent in the United Kingdom.

## 43 TIME WARNER

NEW YORK

**2013 U.S.-BOOKED AIR VOLUME:** \$87 million

**2013 COMPANYWIDE AIR VOLUME:** \$122 million

**2013 U.S. T&E:** \$233.6 million

**2013 COMPANYWIDE T&E:** \$280.5 million

**PRINCIPAL SUPPLIERS:** British Airways, Delta, United; Hilton, Marriott, Starwood; Enterprise, Hertz, National; Concur Travel; Concur Expense; American Express

**CONSOLIDATED U.S. AGENCY:** BCD Travel

Time Warner in June 2014 completed the spinoff of the Time Inc. magazine publishing business to focus on its cable, entertainment and film businesses.

At the end of 2013, the global media and entertainment company counted approximately 34,000 employees, but Time Inc.'s transition to a standalone public company will reduce those levels. Time Inc., as of October 2013 reported a total headcount of 7,800 employees.

Including Time Inc., Time Warner reported full-year 2013 revenue rose 4 percent year over year to \$29.8 billion.

Time Warner has consolidated travel management services with BCD Travel in 22 countries.

## 45 GENERAL MOTORS

DETROIT

**2013 U.S.-BOOKED AIR VOLUME:** \$84.5 million

**CONSOLIDATED GLOBAL AGENCY:** American Express

Automaker General Motors in 2013 increased U.S.-booked air volume 17 percent year over year.

General Motors reported \$155.4 billion in revenue, a 2 percent increase compared with 2012. Full-year earnings before interest and tax also increased to \$8.6 billion compared with \$7.9 billion year

over year. The increase was attributed to favorable vehicle pricing in North America. Net income, however, decreased to \$5.3 billion, compared with \$6.1 billion in 2012.

General Motors had 219,000 employees at the end of 2013, up from 213,000 in 2012.

## 46 EMC CORP.

HOPKINTON, MASS.

**2013 U.S.-BOOKED AIR VOLUME:** \$84 million

**2013 COMPANYWIDE AIR VOLUME:** \$140 million

**PRINCIPAL SUPPLIERS:** American, Delta, United; Hilton, Marriott, Starwood; Avis, Enterprise, National; Concur Travel, Sabre GetThere; Concur Expense; American Express

**CONSOLIDATED GLOBAL AGENCY:** American Express

Despite growth through acquisitions, information management and technology company EMC in 2013 held its U.S.-booked air volume constant with 2012 levels.

EMC in 2013 consolidated its Europe, Middle East and Africa travel markets into one hub and this year will continue to consolidate a few more markets.

The company also further contained costs and improved compliance by performing more audits, using preferred suppliers and obtaining lowest logical airfares.

EMC also incorporated into its travel program several newly acquired companies, some without highly managed programs.

The company uses American Express as its global consolidated agency and for its corporate card program. It currently uses Concur Travel for online bookings in the U.S. market and GetThere in Mexico and Singapore, but is working to consolidate the markets into Concur Travel.

## 46 HONEYWELL

MORRISTOWN, N.J.

**2013 U.S.-BOOKED AIR VOLUME:** \$84 million

**CONSOLIDATED U.S. AGENCY:** American Express

BTN estimates that Honeywell's U.S.-booked air volume last year declined nearly 7 percent to \$84 million from 2012 levels. Selling, general and administrative expenses declined slightly to \$5.19 billion from \$5.22 billion in 2012, as net sales last year rose nearly 4 percent from 2012 levels to \$39 billion.

The company employed 131,000 people worldwide at the end of 2013, down 1,000 from the end of the prior year. Among its global workforce, 51,000 employees were based in the United States at year-end 2013.

Honeywell travelers use online booking and expense management tools furnished by Concur. The company in 2012 switched to Concur from Sabre's GetThere for an online booking solution. Honeywell previously had used Concur's booking tools outside of the United States and its expense management products throughout the world.

# Westin Hotels & Resorts

Business travelers want to stay healthy when they are on the road—and corporations should support them in the name of business productivity and traveler satisfaction.

Columbia University in 2011 published a study of 13,000 business travelers that suggested a link between frequent business travel and “poorer self-rated health, higher body mass index and worse clinical examination results” compared to moderate business travelers. The following year, Carlson Wagonlit Travel, published a ground-breaking “Stress Triggers for Business Travelers” report that showed travelers’ inability to access healthy meal options and maintain fitness routines while on the road for business decreased traveler productivity.

Ensuring healthy options for business travelers makes smart travel management, and partnering with Westin Hotels & Resorts can deliver those travel program benefits.

## WORK WELL WITH TANGENT

Meetings on the road? No problem with Tangent™, Westin’s new collaboration and connectivity studios. Via these small meeting suites, business travelers can access...

- Wired and wireless internet access
- Computers, printers and advanced videoconferencing
- Digital sharing tools with scape technology
- Floor-to-ceiling white boards for brainstorming
- Office supplies and light refreshments

Deliver better business travel. Westin Hotels & Resorts makes it easy.

## More Than A Good Night’s Sleep

Long known for its Heavenly Bed, Westin has been at the forefront of providing all kinds of travelers with wellness options. Business travelers, in particular though, can benefit from turnkey health and wellness options.

**Eat Well** – Created with doctors and nutritionists, Westin SuperFoodsRx™ dishes cultivate “food synergy,” the pairing of certain foods to increase their nutritional value, to give travelers the focused energy they need to meet the business challenges of their day. Healthy choices are clearly indicated on menus, making it easy for business travelers to make the right decisions.

New in July 2014, and rolling out as a comprehensive program in 2015 is Westin’s partnership with The Juicery. Westin Fresh juices and smoothies, with nutrient-rich ingredients are designed to enhance well-being and provide fuel for the day.

**Move Well** – Whether taking advantage of WestinWORKOUT® fitness studios or booking a WestinWORKOUT sleeping room, business travelers don’t need to take a break from fitness while on the road. On-property fitness studios are open 24 hours a day. And travelers need not worry about toting extras: the Westin Gear Lending with New Balance® program can outfit even the fitness fanatic. For runners, 3- to 5-mile running routes are available upon request, and the runWestin concierge program hosts group runs and offers personalized advice from running experts.\*

**Feel Well** – For a totally unique wellness offering, Westin has partnered with



Business travelers have access to Tangent™ small meetings suites to facilitate productivity.

Headspace co-founder and meditation expert Andy Puddicombe to create mindfulness exercises tailored to travelers’ needs. These 10-minute guided thought journeys key into specific traveler stressors and help individuals ease anxieties. For business travelers, such exercises as “Using technology mindfully,” “Preparing for Work,” “Preparing for Your Presentation” can boost productivity and reduce stress.

**The Travel Manager’s Partner** Westin—and all of the Starwood brands—keep a close watch on the needs of business travelers. Keying into these needs, the company creates products and services that will assist travel managers in delivering best-in-class travel programs that keep travelers productive and meet their corporation’s bottom-line goals.

## CONTACT

For more about Westin Hotels & Resorts, visit [www.westin.com](http://www.westin.com)

\* Available at select hotels

**WESTIN**<sup>®</sup>  
HOTELS & RESORTS

**48** **DELL**  
ROUND ROCK, TEXAS

**2013 U.S.-BOOKED AIR VOLUME:** \$82 million  
**2013 COMPANYWIDE AIR VOLUME:** \$120 million  
**PRINCIPAL SUPPLIERS:** American, Delta, United; Hilton, Marriott, Starwood; Enterprise, National; Concur Travel; Concur Expense; American Express  
**CONSOLIDATED GLOBAL AGENCY:** American Express

This year, amidst the leveraged buyout by Michael Dell completed at the end of October 2013, Dell's travel volume has shown neither cutbacks nor anything like the \$21 million year-over-year jump in U.S.-booked air volume it experienced from 2012 levels. For the next year, the technology company anticipates its air volume will remain flat.

In 2012, the company completed the global consolidation of its travel management services business with American Express.

Carlson Wagonlit Travel had been serving some Dell business around the world after Dell acquired Perot Systems in 2009.

Having consolidated its expense audit team to one location last year, Dell now is focused on conducting targeted audits rather than randomly checking anything coming through the expense channel.

The travel team also will be working with senior management on refreshing its global travel and entertainment policy to address such issues as ancillary fees. The team also is going through a reexamination of its airline program.

The company had made progress in its meetings management efforts and plans on making a new effort from a procurement standpoint next year.

Dell measures U.S. online booking adoption at 93 percent.

**49** **PFIZER**  
NEW YORK

**2013 U.S.-BOOKED AIR VOLUME:** \$81.8 million  
**2013 COMPANYWIDE AIR VOLUME:** \$270 million  
**2013 U.S. T&E:** \$800 million  
**2013 COMPANYWIDE T&E:** \$1.1 billion  
**PRINCIPAL SUPPLIERS:** Air China, Air France, American, British Airways, China Southern, Delta, Qantas, Singapore, United; Accor, Hilton, Marriott, Starwood; Avis, Budget; Concur Travel, Sabre GetThere; Concur Expense; American Express  
**CONSOLIDATED GLOBAL AGENCY:** BCD Travel

Pharmaceutical company Pfizer's U.S.-booked air volume decreased in 2013 by \$9 million from 2012 levels, due in part to the divestiture of its animal health and nutrition business units.

Pfizer has leveraged metrics to promote efficient traveler behavior. Since implementing Concur Travel in 2012, Pfizer has improved its online booking adoption by about 20 percentage points due to such approaches as education sessions for travel arrangers worldwide and more focused communication on the cost benefits of booking online versus directly with the agency.

For 2014, the pharmaceutical company plans to track the acceptance of lowest logical fares, promote booking 14 days in advance and increase the use of its preferred airlines, hotels and corporate card. Pfizer additionally is working to consolidate and integrate travel and meetings data, and is planning a car service request for proposals in the fourth quarter of 2014.

The pharmaceutical company uses GetThere for a few Latin American markets, including Brazil, but plans to consolidate with Concur.

**50** **MEDTRONIC**  
MINNEAPOLIS

**2013 U.S.-BOOKED AIR VOLUME:** \$81 million  
**2013 COMPANYWIDE AIR VOLUME:** \$127 million  
**2013 U.S. T&E:** \$246.9 million  
**2013 COMPANYWIDE T&E:** \$363.7 million  
**PRINCIPAL SUPPLIERS:** American, Delta, United; Hilton, Marriott, Starwood; Avis, Enterprise, National; Sabre GetThere; AdSoft Expense Express; American Express  
**CONSOLIDATED GLOBAL AGENCY:** American Express

U.S.-booked air volume in 2013 remained static year over year for Medtronic, a manufacturer of medical device technology.

Medtronic in 2013 increased compliance by improving and consolidating reporting by business units. The firm also began charging back noncompliant agency transaction fees to associated cost centers. Previously the firm centrally absorbed the fees.

Medtronic in 2014 is working to expand its global card and agency coverage. While major markets are covered, Medtronic is adding smaller, developing markets to its travel program.

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

**2013 U.S.-BOOKED AIR VOLUME:** \$75 million  
**CONSOLIDATED U.S. AGENCY:** American Express

BTN estimates Merck reduced its 2013 U.S.-booked air volume to \$75 million from \$98.2 million in 2012. Merck reported full-year 2013 sales declined 7 percent from 2012 to \$44 billion, citing patent expirations and the impact of foreign exchange rates.

The pharmaceutical company aggressively has cut its headcount and ended 2013 with 76,000 employees worldwide, a decline of 7,000 from 2012 levels. The company in the fall of 2013 announced a two-year target to cut 20 percent of its workforce.

The pharmaceutical firm in 2013 had planned to reduce business-class usage, implement pre-trip approval processes and decrease the number of airfares purchased within two weeks.

Meetings management technology supplier Cvent counts Merck among its clients and last year reported a renewed "multi-year" deal to provide strategic meetings management software to the company.

Merck's travelers carry the American Express corporate card.

# American Airlines

Committed to Corporate Travel

American Airlines has jettisoned “business as usual” and is looking to a future that prioritizes the corporate travel experience and delivers results to its preferred partners.

## Putting Corporate Travel Partnerships First

American’s experienced team is committed to delivering the value corporations need to meet their goals. The company is streamlining contracts to include custom discounts along with delivering the benefits of its alliance partners. Plus, business travelers benefit from membership in one of the best frequent flyer programs in the world, where AAdvantage® elite status provides true value to travelers.

## Expanded Global Network

American has optimized its schedules to the world’s major business centers and offers an individual network of more than 330 cities world-wide. With the carrier’s oneworld® alliance partners, American connects business travelers to the world like never before.

American has also concentrated on key international and domestic routes for business travelers, making them frequent, convenient and comfortable.

- Together with British Airways, American offers up to 17 daily departures from New York to London to ensure that business travelers arrive and depart when their schedules require. Plus, upgraded product and services offered on the new Boeing 777-300ER are unsurpassed (see “Modern Fleet” below).
- American is the first airline to push off from Dallas/Fort Worth with nonstop service to Hong Kong and Shanghai. These new routes are also serviced with

Boeing 777-300 metal, which feature fully adjustable lie-flat seats in First and Business Class. Once through these gateway cities, American’s regional alliance partners offer convenient service throughout the mainland and Southeast Asia.

- Domestic business travelers can rely on American Airlines to deliver the most daily flights between New York and Los Angeles and the only hourly shuttle service between New York, Boston and Washington, DC.

## Modern Fleet

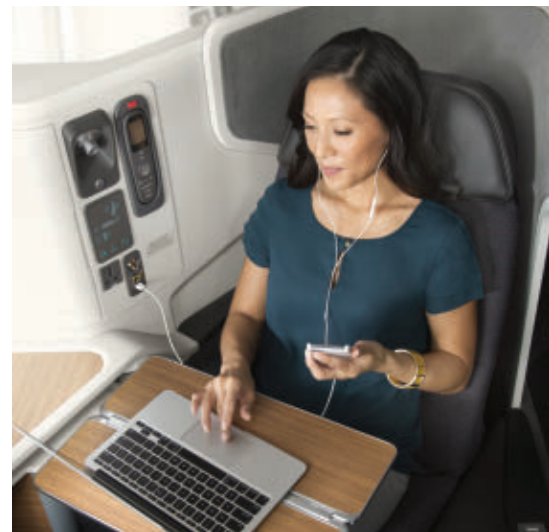
American is adding new planes every week to bring business travelers a modern and connected travel experience.

## The International Experience

For international travelers, the new Boeing 777-300ER is transformational. First and Business Class offer large work areas that keep travelers productive with in-seat universal AC outlets and USB ports, and international Wi-Fi.

In addition to increased legroom, the 777-300ER features a unique arched ceiling that provides uncommon headspace and every premium cabin seat features aisle access to ensure more comfort and mobility in the air. A stocked refreshment bar is always available and inflight entertainment includes personal, in-seat screens and up to 250 movies, over 150 TV programs and 350 audio selections. First and Business Class travelers enjoy entertainment with Bose® QuietComfort® 15 Acoustic Noise Cancelling® headsets.

When hard-working travelers are ready for some downtime, First and Business Class passengers enjoy fully lie-flat seats which allow travelers to adjust any compo-



ment of the seat, including the seat back, head rest and leg rest.

## Raising the Bar for Domestic Travel

For travel across the country, American’s new A321 Transcon aircraft offers the only three-class service on such routes as New York to Los Angeles and New York to San Francisco. Lie-flat seats all have aisle access in First and Business Class, and First Class amenities such as made-fresh cappuccinos make the experience as close to that of a private jet as possible when flying commercial. Plus, American Airlines offers Wi-Fi on nearly all domestic flights and maintains the most power-equipped planes—in all service cabins—among major North American carriers.

## CONTACT

[aa.com/corporatetravel](http://aa.com/corporatetravel)

American Airlines 

**51 MORGAN STANLEY**

**NEW YORK**

**2013 U.S.-BOOKED AIR VOLUME:** \$75 million

**CONSOLIDATED U.S. AGENCY:** American Express

Morgan Stanley's U.S.-booked air volume rose nearly 12 percent from 2012 levels, according to a *BTN* estimate. In a webcast last fall with Morgan Stanley airline analysts, the company's corporate travel head saw strong business travel demand within the company, with booking trends in the fall rebounding to a point not seen since "before the financial crisis," according to a recap by the company's airline equity analysts. The strength at the time was most pronounced in domestic travel, trending upward in the 10 percent-plus range, as demand to Europe, the Middle East and Africa also saw some pickup in the back half of the year, though demand to Asia was softening.

The travel demand strength was on the back of growth in the business, as Morgan Stanley for full-year 2013 saw net revenues climb to \$32.4 billion from \$26.1 billion in 2012. Headcount at Morgan Stanley fell last year to 55,794 employees worldwide from 57,061 employees at the end of 2012. That continued a trend as the company at the end of 2011 counted 61,546 employees worldwide.

**51 SAP**

**WALLDORF, GERMANY**

**2013 U.S.-BOOKED AIR VOLUME:** \$75 million

**CONSOLIDATED U.S. AGENCY:** BCD Travel

Multinational business software provider SAP's U.S.-booked air volume fell year over year by more than \$10 million to \$75 million in 2013, *BTN* estimates.

SAP has set a target to bring greenhouse gas emissions down to 2000 levels by 2020. The target includes direct emissions as well as indirect ones, such as those generated by corporate travel. The company last year worked with its major rental car providers to reduce the carbon footprint of employee travel and "provide a greater variety of sustainable solutions, including hybrid vehicles," according to SAP's sustainability report. The company also claims a desire to purchase products and services from suppliers that "meet high environmental and social standards."

SAP's total revenue last year climbed 4 percent year over year to €16.8 billion. Headcount rose 3 percent to 66,572 employees.

**51 VERIZON COMMUNICATIONS**

**NEW YORK**

**2013 U.S.-BOOKED AIR VOLUME:** \$75 million

**CONSOLIDATED GLOBAL AGENCY:** None, Orbitz for Business is primary

*BTN* estimates Verizon's 2013 U.S.-booked air volume rose nearly 6 percent year over year to \$75 million.

The company's travel department has deployed demand manage-

ment techniques, including the promotion of remote conferencing options in travel booking workflows when travelers indicate internally focused trips. The telecommunications giant also measures the savings such alternatives generate.

In addition to saving travel dollars, remote conferencing adoption also has helped fulfill sustainability goals. The company's 2013 report on corporate social responsibility noted it expanded energy usage reporting to include metrics on business travel emissions.

Verizon's online booking adoption rate in the United States early last year hovered north of 90 percent, and the company set the goal to further expand online booking systems globally.

Verizon's consolidated revenues last year rose 4 percent year over year to \$120.6 billion.

The company has a presence in more than 150 countries and at year-end 2013 counted 176,800 employees, down from 183,400 at year-end 2012.

**55 INTERNATIONAL MONETARY FUND**

**WASHINGTON, D.C.**

**2013 U.S.-BOOKED AIR VOLUME:** \$73 million

**PRINCIPAL SUPPLIERS:** Hilton, InterContinental, Starwood; Sabre GetThere; Oracle PeopleSoft; Bank of Montreal Diners Club

**CONSOLIDATED U.S. AGENCY:** None, Travelocity Business is primary

The International Monetary Fund in 2013 became more efficient at containing costs through the use of an in-house program developed more than four years ago in conjunction with different travel agencies. While noncompliant or excessive expenses once would be detected only after the employee traveled, the system allows travel agents to send travel itineraries to IMF's budget department and to work with travelers to find more cost-effective options.

More aggressive negotiations with suppliers helped keep U.S.-booked air travel in 2013 fairly flat, with a \$1 million year-over-year increase.

IMF in 2013 launched an airline request for proposals and began awarding new contracts this year.

The organization in the fall of 2014 plans on bidding its corporate card program, which currently is a Diners Club card issued by the Bank of Montreal.

**55 SANOFI**

**PARIS**

**2013 U.S.-BOOKED AIR VOLUME:** \$73 million

**2013 U.S. T&E:** \$150 million

**2013 COMPANYWIDE T&E:** \$327 million

**PRINCIPAL SUPPLIERS:** American, Delta, United; Hilton, Marriott, Starwood; Avis, National; Concur Travel; Concur Expense, SAP; American Express

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

Reflecting sales growth, the company's U.S.-booked air in 2013 increased 36 percent from 2012 levels, and the pharmaceutical

company expects a further 12 percent rise for 2014.

The travel department's endeavors in 2013 included a travel management company request for quotations, requests for proposals for its car rental program and its hotel program, and a focus on aligning its security program globally.

For 2014, the Sanofi travel team aims to tackle air program regionalization and the completion of the hotel RFP process.

No major policy changes are anticipated, but collecting accurate data remains a challenge for the pharmaceutical company's travel department.

The company's 10,000 business travelers use Concur for their expense reporting needs in the United States and SAP elsewhere.

Of Sanofi's total 2013 U.S.-booked air, 50 percent was for domestic travel and 89 percent was reserved online; 78 percent of those online bookings required no agent assistance.

BCD Travel is Sanofi's primary travel management company inside the United States; American Express primarily handles its travel elsewhere.

The company has more than 110,000 employees and had nearly \$43 billion in sales in 2013.

Sanofi's 2013 was "marked by the end of the impact of generification of some of our key products in the U.S.," but the company "returned to sales growth" in the third quarter.

## 57 SCHLUMBERGER

PARIS

**2013 U.S.-BOOKED AIR VOLUME:** \$71.8 million

**PRINCIPAL SUPPLIERS:** Air France-KLM, American, Emirates, Qatar, Singapore, United; Hilton, InterContinental, Marriott; Enterprise, Hertz, National; Sabre GetThere; Concur Expense; American Express

**CONSOLIDATED U.S. AGENCY:** BCD Travel

Oilfield services company Schlumberger in the beginning of 2013 implemented some travel restrictions, which resulted in an 18 percent year-over-year decrease in 2013 U.S.-booked air volume.

In 2013, BCD Travel provided travel management services in the United States, with American Express doing so elsewhere. However, Schlumberger this year also plans to implement Amex in the United States as well, which will allow the TMC to service 74 percent of all global bookings.

Schlumberger reported for 2013 an 8 percent revenue increase to \$45.3 billion "on higher exploration and development activity," according to the company's annual report.

The company at the end of 2013 employed 123,000 people in approximately 85 countries.

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**58 INTEL**

**SANTA CLARA, CALIF.**

**2013 U.S.-BOOKED AIR VOLUME:** \$70.6 million

**2013 COMPANYWIDE T&E:** \$141 million

**PRINCIPAL SUPPLIERS:** American, Delta, Star Alliance, United; Hilton, Marriott, Starwood; Hertz; Concur Expense; American Express

**CONSOLIDATED GLOBAL AGENCY:** American Express

Intel in the third quarter of 2013 changed its travel policy to permit bookings through multiple channels to enable choice and flexibility. Such activity, however, so far has been low.

The semiconductor giant for 2014 will continue to work on enhancing the traveler experience and reducing travel by providing more options to meet traveler needs, yet remain within policy.

Intel's 2013 net revenue declined 1 percent year over year to \$52.7 billion. Net income in 2013 declined to \$9.6 billion from \$11 billion in 2012. Intel's headcount was 107,600 employees as of December 2013, up from 105,000 in 2012.

**59 DANAHER**

**WASHINGTON, D.C.**

**2013 U.S.-BOOKED AIR VOLUME:** \$70 million

**CONSOLIDATED U.S. AGENCY:** None, BCD Travel and American Express are primary

BTN estimates that manufacturing and technology conglomerate Danaher spent \$70 million on airfare from the U.S. point of sale in 2013, up from the prior year.

Last year, the company consolidated its U.S. travel management company services with BCD Travel and American Express, although it still uses multiple travel management companies outside the United States.

The company is actually 43 separate companies that use a variety of enterprise resource planning systems. Only two of those companies have dedicated travel managers, which is why Danaher's travel council is a continually changing team. The council meets virtually monthly and face-to-face once annually.

The focus of the procurement-led travel program is to reduce spending, a task for which it employs a liberal use of scorecards. It uses key performance indicators for travel compliance, advance-purchase and online booking compliance, hotel and car average daily rate, average ticket price and costs per mile, as well as year-over-year spending comparisons.

**60 UBS**

**ZURICH**

**2013 U.S.-BOOKED AIR VOLUME:** \$69 million

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

Global travel and entertainment spending at Swiss banking giant UBS in 2013 totaled 451 million Swiss francs, essentially unchanged

from 2012 levels. BTN estimates that its 2013 U.S.-booked air volume was basically flat year over year, as well.

The company in Switzerland last year recorded a 7 percent year-over-year decline in the number of employee flights taken and a 2 percent increase in employees' use of high-speed rail.

UBS is continuing an environmental initiative that includes offsetting 100 percent of its greenhouse gas emissions resulting from agency-booked business travel and clients' events and conferences. The company in 2013 offset more than 72,000 metric tons of equivalent carbon dioxide, helping to fund a wind-power project in Turkey and community biofuel projects in China and India.

UBS has invested in videoconferencing as a travel alternative and now has available more than 400 rooms worldwide, which in 2013 were booked more than 80,000 times.

The company at the end of 2013 had about 60,200 full-time-equivalent employees, down about 4 percent from 2012 levels.

**61 DEUTSCHE BANK**

**FRANKFURT**

**2013 U.S.-BOOKED AIR VOLUME:** \$68.6 million

**2013 COMPANYWIDE AIR VOLUME:** \$227 million

**2013 U.S. T&E:** \$119.7 million

**2013 COMPANYWIDE T&E:** \$467 million

**PRINCIPAL SUPPLIERS:** Concur Travel, Sabre GetThere; Concur Expense; American Express

**CONSOLIDATED U.S. AGENCY:** HRG

Deutsche Bank's travel organization in 2013 focused on employee behavior in an effort to reduce costs without impacting the number of trips. The team achieved 98 percent compliance to policy globally, and 70 percent of all trips less than five hours were purchased using low-cost restricted airfares. In addition, Deutsche Bank oversaw a significant reduction in its number of discretionary trips, managing to hold its 2013 U.S.-booked air volume flat year over year, even as the company had an increased headcount, which drove a need for additional travel.

A new global pre-trip approval tool was deployed last year to cover 80 percent of spend while a first-generation tool decommissioned. A new online travel data tool was rolled out to cost managers, providing forecasts of spend based on pre-trip data, post-trip trend data and actual budgetary information so cost owners can manage expenses with full transparency.

The company in 2014 intends to focus on globalizing its European corporate fleet program and assess methods of integrating mobile services into the travel program to improve the user experience for the company's 22,250 frequent business travelers.

Hogg Robinson Group in 2013 handled 100 percent of the company's U.S.-booked air volume; outside the United States, Deutsche Bank has three travel management companies across 50 countries—HRG, BCD Travel and American Express.

Deutsche Bank's primary online booking system outside the United States varies by country. Travelers primarily use GetThere in the United States and United Kingdom, and Concur Travel in Germany.

**62 BOSTON CONSULTING GROUP****BOSTON****2013 U.S.-BOOKED AIR VOLUME:** \$67 million**CONSOLIDATED GLOBAL AGENCY:** American Express

U.S.-booked air spending by privately held Boston Consulting Group in 2013 was up 5 percent from 2012. Its 2013 revenue was up one-quarter of a billion dollars from 2012 to \$3.95 billion.

The company plans to continue to increase online adoption, improve hotel compliance and seek additional savings opportunities within its travel program.

The firm operates 84 offices in 47 countries, and travel is consolidated with American Express in all of them. It employs 9,700 people.

**63 TRANSOCEAN****GENEVA, SWITZERLAND****2013 U.S.-BOOKED AIR VOLUME:** \$65 million**CONSOLIDATED U.S. AGENCY:** Carlson Wagonlit Travel

Offshore drilling contractor Transocean in 2013 saw total revenue increase more than 3 percent to about \$9.5 billion.

The company's 2013 U.S.-booked air volume declined very slightly from 2012 levels.

CWT is Transocean's primary travel management company inside the United States, but the company uses others elsewhere. An overwhelming majority of Transocean's U.S.-booked air volume is for international travel.

At the end of 2013, Transocean had about 15,100 employees.

**63 UNITEDHEALTH GROUP****MINNETONKA, MINN.****2013 U.S.-BOOKED AIR VOLUME:** \$65 million**CONSOLIDATED U.S. AGENCY:** BCD Travel

Healthcare firm UnitedHealth Group last year increased its U.S.-booked air spending about 3 percent compared with 2012 levels. The company in 2013 had about \$122.5 billion in global revenue, up from about \$110.6 billion in 2012.

UnitedHealth Group last year completed a bid process for global travel management service, switching its consolidated travel management company in the United States to BCD Travel from American Express.

The firm at the end of 2013 employed about 156,000 people.



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**65 MARSH & MCLENNAN COS.**

**NEW YORK**

**2013 U.S.-BOOKED AIR VOLUME:** \$64 million

**2013 COMPANYWIDE AIR VOLUME:** \$126 million

**2013 U.S. T&E:** \$130 million

**2013 COMPANYWIDE T&E:** \$310 million

**PRINCIPAL SUPPLIERS:** Delta, United; Hilton, Marriott, Starwood; Enterprise, Hertz, National; GetThere, KDS; Oracle iExpense; American Express

**CONSOLIDATED GLOBAL AGENCY:** BCD Travel

Marsh & McLennan in 2013 focused on the continued consolidation of its global travel program. BCD Travel now is the company's consolidated travel management company worldwide, and MMC's 24,500 business travelers use the American Express corporate card globally.

The travel team in 2013 also launched a strategic meetings management program in the United States, Canada and the United Kingdom.

Travel management goals for 2014 include launching a global travel policy, expanding the SMM program, and completing its agency and card implementations.

The company in 2013 saw an increase of about 10 percent in U.S.-booked air volume, compared to 2012.

KDS is the primary booking tool used outside the United States; GetThere is used domestically.

MMC employs 55,000 people and has clients in more than 130 countries. The company's annual revenues in 2013 totaled approximately \$12.3 billion.

**66 AMERICAN INTERNATIONAL GROUP**

**NEW YORK**

**2013 U.S.-BOOKED AIR VOLUME:** \$63.4 million

**PRINCIPAL SUPPLIERS:** Amadeus e-Travel, Concur Travel; Concur Expense

**CONSOLIDATED U.S. AGENCY:** American Express

AIG two years ago fully repaid its financial debt to the U.S. federal government, making 2013 "a year in which AIG demonstrated that it has a solid foundation for sustainable profitability," according to the company's annual report.

The company in 2013 gained revenue of \$68.7 billion. The insurance and financial services giant's 2013 U.S.-booked air volume increased roughly \$10 million from 2012 to 2013, and a further rise is expected in 2014.

The AIG travel team in 2013 completed its own transition, consolidating U.S. travel management services with American Express. The company in 2013 also used HRG outside of the United States. The travel department also updated the corporate policy, revising per diems for meals by country. In 2014, AIG plans to increase online adoption.

AIG uses Concur Travel for U.S. online bookings and Amadeus

e-Travel outside of the United States. Of AIG's 2013 U.S.-booked air, 51 percent was for domestic travel and 65 percent was booked online; 89 percent of online bookings required no assistance from an American Express agent.

The company's 10,000 business travelers used Concur Expense globally to report their expenses.

The regulatory structure for the insurance industry continues to undergo significant change, impacting AIG in 2013, when it was officially named by the U.S. Financial Stability Oversight Council as a non-bank systemically important financial institution.

The company employs 64,000 people in more than 90 countries and has customers in more than 130 countries and jurisdictions.

**67 WAL-MART STORES**

**BENTONVILLE, ARK.**

**2013 U.S.-BOOKED AIR VOLUME:** \$63 million

**PRINCIPAL SUPPLIERS:** Oneworld, SkyTeam, Star Alliance; Hilton, InterContinental; Enterprise; Sabre GetThere

**CONSOLIDATED U.S. AGENCY:** Walmart Corporate Travel Department

Retail giant Walmart's ARC-accredited U.S. Corporate Travel Department reported \$63 million in airline sales for fiscal year 2013, up 11 percent from the previous year.

Last year, in an effort to globalize the travel program, Walmart completed a request-for-proposal process for a global travel management company, selecting Carlson Wagonlit Travel.

Walmart in 2013 continued to use the travel policy implemented the previous year, mandating all reservations, including hotels, be booked through its preferred GetThere booking tool or via its CTD.

Walmart uses a Universal Air Travel Plan account for airline purchases and provides travelers with Citibank-issued MasterCard cards.

**68 L-3 COMMUNICATIONS**

**NEW YORK**

**2013 U.S.-BOOKED AIR VOLUME:** \$62 million

**CONSOLIDATED U.S. AGENCY:** American Express

Consolidated net sales for aerospace and defense contractor L-3 Communications in 2013 dipped to \$12.6 billion from \$13.1 billion in 2012, reflective of the spending environment of the U.S. federal government. *BTN* estimates L-3's 2013 U.S.-booked air volume declined as well.

In 2012, L-3 spun off some of its government services into a new independent company called Engility, based in Chantilly, Va. As part of the spinoff, Engility temporarily was able to use L-3's preferred travel supplier pricing agreements, including those with American Express for travel management and those with L-3's preferred airlines, hotel companies and car rental firms, including Hertz Corp. Engility travelers had to abide by L-3 travel policies and procedures. That arrangement ended Dec. 31, 2013.

L-3 at the end of 2013 had about 48,000 employees.

**69 BASF CORP.****LUDWIGSHAVEN, GERMANY****2013 U.S.-BOOKED AIR VOLUME:** \$61 million**2013 COMPANYWIDE AIR VOLUME:** \$280 million**2013 U.S. T&E:** \$130 million**2013 COMPANYWIDE T&E:** \$600 million**PRINCIPAL SUPPLIERS:** Delta, United, US Airways; Best Western, Hilton, Wyndham; Avis, Enterprise, Hertz; Sabre GetThere, Cytric iFAO; SAP; JPMorgan Chase MasterCard**CONSOLIDATED U.S. AGENCY:** American Express

BASF, which joined the ranks of the Corporate Travel 100 in 2012, has seen steady increases in U.S.-booked air volume since its inaugural showing, growing from \$46.7 million in 2011 to \$56 million in 2013. Yet, in 2013 BASF was able to demonstrate air savings of \$4.5 million and expects its U.S.-booked air volume in 2014 to increase less than 4 percent to \$58 million.

The chemical, plastics and agricultural product manufacturer plans to examine the global structure of the travel management organization and optimize wherever possible.

With an eye on that goal, all countries in North America now fall under one travel policy umbrella. However, no travel policy changes are expected in 2014.

The company's 9,000 business travelers use GetThere to book travel online in the United States and Cytric iFAO elsewhere. Of BASF's total 2013 U.S.-booked air volume, 78 percent was reserved online, and 84 percent of those required no agent assistance.

Carlson Wagonlit Travel is BASF's consolidated agency outside of the United States.

**69 BAYER****LEVERKUSEN, GERMANY****2013 U.S.-BOOKED AIR VOLUME:** \$61 million**2013 COMPANYWIDE AIR VOLUME:** \$240 million**2013 U.S. T&E:** \$224 million**PRINCIPAL SUPPLIERS:** Delta, Lufthansa, United; Hilton, Marriott, Starwood; Enterprise, National; Concur Travel; Concur Expense; U.S. Bank MasterCard**CONSOLIDATED U.S. AGENCY:** BCD Travel

Bayer in 2013 implemented a pre-trip authorization policy in several corporate subgroups and also incorporated language governing gifts into the corporate travel policy.

The pharmaceutical company in 2014 aims to amend its travel policy to permit reimbursement of some ancillary charges up to a certain dollar amount.

Bayer also plans to conduct this year a global airline request-for-proposals process.

Bayer's 9,000 business travelers use U.S. Bank's MasterCard in the United States, and globally they report their expenses via Concur.

Of Bayer's 2013 U.S.-booked volume, 38 percent was domestic.

Overall, 62 percent of all domestic and international bookings were reserved online; 65 percent of those online bookings required no agent assistance.

BCD Travel handled 95 percent of Bayer's 2013 U.S.-booked travel, but outside the United States, each country is allowed to select from one of three agencies designated by the company's global travel management department.

The company's 2013 U.S.-booked air increased from \$57.2 million in 2012 and is expected to rise to \$63 million in 2014.

**69 OMNICOM GROUP****NEW YORK****2013 U.S.-BOOKED AIR VOLUME:** \$61 million**PRINCIPAL SUPPLIERS:** American, Delta; Budget, Hertz; Concur Travel; Bank of America**CONSOLIDATED U.S. AGENCY:** None

Marketing and advertising conglomerate Omnicom in 2013 announced a merger with fellow *BTN* Corporate Travel 100 company Publicis, which would have formed the largest advertising firm in the world, but in May 2014 the companies officially canceled the merger.

Even so, Omnicom, which is made up of more than 600 independent companies, in 2013 continued to expand its travel management company program into previously nonparticipating countries, especially in Latin America.

*BTN* estimates Omnicom's U.S.-booked air spending year over year grew about 5 percent to \$61 million.

Outside the United States, Carlson Wagonlit Travel and BCD Travel are the primary providers of travel management services. In North and South America, where Omnicom previously used three travel management companies, CWT and BCD each handled about half of Omnicom's travel business in 2013.

Bank of America continues to serve as Omnicom's preferred U.S. corporate card provider.

Omnicom last year focused on significantly raising its use of Concur Travel, which is the only online booking tool it uses in the United States and the one it uses the most elsewhere.

For expense reporting, the company uses an internally developed tool globally.

**72 AMAZON.COM****SEATTLE****2013 U.S.-BOOKED AIR VOLUME:** \$60 million**CONSOLIDATED U.S. AGENCY:** Carlson Wagonlit Travel

*BTN* estimates that online retailer Amazon.com's 2013 U.S.-booked air volume increased from 2012 levels.

The company's revenue in 2013 increased 22 percent from 2012 levels to about \$74.5 billion.

Amazon at the end of 2013 employed about 117,300 full-time and part-time workers, up about 33 percent year over year.

**72 DEERE & CO.**  
**MOLINE, ILL**

**2013 U.S.-BOOKED AIR VOLUME:** \$60 million

**2013 COMPANYWIDE T&E:** \$100 million

**PRINCIPAL SUPPLIERS:** American, Delta, United; Hilton, InterContinental; Hertz; SAP; JPMorgan Chase

**CONSOLIDATED GLOBAL AGENCY:** Carlson Wagonlit Travel

Deere & Co. in 2013 expanded worldwide and “continued an aggressive launch” of new products. For the 2013 fiscal year, Deere reported net sales and revenues of \$37.8 billion, a 5 percent increase from the prior year.

The heavy equipment manufacturer’s 30,000 business travelers in 2013 used JPMorgan Chase corporate cards in a central bill/central pay program, but the company since has contracted with a different card vendor.

Business travelers enter their expenses into the company’s SAP reporting system.

Forty percent of the company’s 2013 air volume booked at the U.S. point of sale was for domestic travel.

Deere in recent years has pushed for international expansion; the company has announced plans to open seven factories “in markets key to our future growth,” including three factories in China, two in Brazil and one each in India and Russia. An additional six factories are in development in the United States.

**72 WPP**  
**LONDON**

**2013 U.S.-BOOKED AIR VOLUME:** \$60 million

**CONSOLIDATED GLOBAL AGENCY:** BCD Travel

Advertising and public relations firm WPP, which owns dozens of firms, including Burson-Marsteller and Hill & Knowlton, saw total revenue in 2013 increase to about £11 billion, up more than 6 percent from 2012 levels.

BTN estimates that its 2013 U.S.-booked air volume increased year over year as well.

WPP in 2013 logged about 538 million miles of business air travel, up from 490 million miles in 2012. The company classified 56 percent of its 2013 flown miles as long-haul, 32 percent as medium-haul and 12 percent as short-haul.

WPP, however, last year continued a push to reduce air travel via the use of videoconferencing. Created in 2009, WPP Connect, the company’s videoconferencing program, at the end of 2013 totaled 672 units in more than 150 cities, available for use by any WPP company. The total number of units includes 75 high-definition videoconferencing facilities and four immersive telepresence rooms. WPP in 2013 added 40 videoconferencing units to its total.

The company offset 100 percent of the equivalent carbon dioxide generated by its 2013 business air travel.

WPP at the end of 2013 had about 119,000 employees.

**75 AMGEN**  
**THOUSAND OAKS, CALIF**

**2013 U.S.-BOOKED AIR VOLUME:** \$59 million

**CONSOLIDATED GLOBAL AGENCY:** Carlson Wagonlit Travel

BTN estimates pharmaceutical and biotechnology firm Amgen in 2013 increased its U.S.-booked air volume slightly from 2012 levels. Overall 2013 company revenue last year increased more than 9 percent year over year to more than \$18.2 billion.

Amgen in October 2013 closed a \$9.7 billion acquisition of California-based pharma company Onyx Pharmaceuticals.

The company had set a goal to establish by 2016 a presence in 75 markets; instead, Amgen announced it had done so on Jan. 1, 2014, ahead of schedule. That expansion includes “several key emerging markets,” according to its annual report.

Amgen at the midpoint of 2014 had about 20,000 employees.

**75 EMERSON ELECTRIC CO.**  
**FERGUSON, MO.**

**2013 U.S.-BOOKED AIR VOLUME:** \$59 million

**CONSOLIDATED GLOBAL AGENCY:** None

Net sales in 2013 at manufacturing conglomerate Emerson increased about 1 percent year over year to \$24.5 billion. BTN estimates that U.S.-booked travel in 2013 basically held steady at 2012 levels.

The company uses two agencies globally: American Express Global Business Travel and Carlson Wagonlit Travel. Emerson in recent years consolidated its Latin America travel program with American Express.

Emerson averaged 132,000 employees worldwide during its 2013 fiscal year, which ended Sept. 30, 2013.

**75 NIKE**  
**BEAVERTON, ORE.**

**2013 U.S.-BOOKED AIR VOLUME:** \$59 million

**CONSOLIDATED GLOBAL AGENCY:** TS24

For the 12 months ending May 31, 2014—Nike’s 2014 fiscal year—the global athletics apparel manufacturer earned \$27.8 billion in revenue, up almost 10 percent from fiscal 2013 levels. BTN estimates the company slightly increased its calendar-year 2013 U.S.-booked air volume year over year.

Nike’s operating overhead expense, a spending category that includes the company’s business travel and meetings expenditures, in FY14 increased 14 percent year over year to about \$5.7 billion.

The company is in the midst of a five-year contract, which began in 2011, with travel management company TS24 to provide multi-national service.

The TMC services the account through a network of independent agencies throughout the world.

**78 CREDIT SUISSE****ZURICH****2013 U.S.-BOOKED AIR VOLUME:** \$58 million**2013 COMPANYWIDE AIR VOLUME:** \$153 million**PRINCIPAL SUPPLIERS:** American, British Airways, United; Four Seasons, Marriott, Starwood; Hertz; Concur Travel; Concur Expense; American Express**CONSOLIDATED GLOBAL AGENCY:** American Express

Credit Suisse in 2013 globally implemented Concur's online booking and expense management systems and furthered cost savings on travel expenditures.

The financial services company's U.S.-booked air volume in 2013 decreased about \$1 million from 2012 levels, and the company anticipates a similar drop in 2014.

Credit Suisse in 2014 is working to consolidate global management information system reporting into one central department and implement a program for air and hotel spending optimization in the United States and the United Kingdom.

Credit Suisse's 8,500 business travelers primarily use American Express in the United States.

Of the company's 2013 U.S.-booked air volume, 37 percent was domestic, 77 percent was booked online and of those, 66 percent required no assistance from an American Express agent.

Credit Suisse's 2013 air volume booked from European points of sale reached \$63 million.

**79 FIDELITY INVESTMENTS****BOSTON****2013 U.S.-BOOKED AIR VOLUME:** \$57.7 million**2013 COMPANYWIDE AIR VOLUME:** \$66.5 million**PRINCIPAL SUPPLIERS:** American, Delta, JetBlue; Hilton, Marriott, Starwood; Enterprise, Hertz, National; Orbitz for Business; Oracle; American Express**CONSOLIDATED U.S. AGENCY:** Orbitz for Business

Fidelity Investments in 2013 went out to bid for its global hotel program and pursued global data consolidation efforts. Additionally, the financial services company implemented and executed a communication strategy, including an internal social media site, travel management company executive scorecards, air and hotel benchmark studies and a global Topaz audit.

Fidelity in 2014 planned to continue the global hotel request-for-proposals process and issue a global airline RFP, while migrating Ireland to a new travel management company. The company also is pursuing business-unit travel dashboards, hotel e-folio integrations, communication and education.

For travel outside the United States, Fidelity uses multiple travel management companies; however, BCD Travel consolidates booked data for all of its agencies.

Fidelity uses Orbitz for Business domestically, and 85 percent of its 2013 U.S.-booked air was domestic and booked online.

**80 FORD MOTOR CO.****DEARBORN, MICH.****2013 U.S.-BOOKED AIR VOLUME:** \$57.2 million**2013 COMPANYWIDE AIR VOLUME:** \$195 million**2013 U.S. T&E:** \$140 million**2013 COMPANYWIDE T&E:** \$295 million**PRINCIPAL SUPPLIERS:** American, Delta, United; Hampton Inn, Holiday Inn, Marriott; Avis, Budget, Hertz; Concur Travel; Concur Expense; Citi**CONSOLIDATED GLOBAL AGENCY:** American Express

Ford in 2013 improved trip-approval processes and refined its business-class travel policy. In 2014, the automaker intends to improve policy compliance, expand online booking capabilities and address ancillary spending rules.

Of Ford's 2013 U.S.-booked air volume, 65 percent was for domestic travel.

Ninety percent of the company's U.S.-booked air was reserved through the corporate booking tool, Concur. Of those reservations, 75 percent were touchless.

Ford's 10,000 business travelers use Concur Expense for their reporting needs.

Ford's U.S.-booked air volume rose about 27 percent from 2012.

Company revenue in 2013 totaled \$146.9 billion, up from \$133.6 billion in 2012.

**81 ILLINOIS TOOL WORKS****GLENVIEW, ILL****2013 U.S.-BOOKED AIR VOLUME:** \$57 million**PRINCIPAL SUPPLIERS:** Concur**CONSOLIDATED U.S. AGENCY:** American Express

Manufacturing firm Illinois Tool Works uses American Express as its consolidated U.S. agency and for service in 20 additional markets. ITW is in the process of deploying Amex globally, including in markets where multiple travel agencies currently are used.

The company also is in the process of globally deploying Concur's travel and expense automation systems. Thus far, the tools have been implemented in 14 countries with plans to expand to other regions in the next six to nine months.

U.S.-booked air volume in 2013 was \$57 million, up \$2 million from the year before. For the current year, that figure is expected to rise again to about \$60 million.

ITW has a global workforce of 51,000 employees—21,000 of whom are travelers—spread across hundreds of operating units in 54 countries.

The company's full-year 2013 revenue was \$14.1 billion; second-quarter 2014 revenue increased 4 percent to \$3.7 billion.

About 50 percent of the company's revenue is generated in North America, with 29 percent from Europe, the Middle East and Africa, and the remaining 21 percent from Asia/Pacific and other regions.

**82 3M**

**ST. PAUL, MINN.**

**2013 U.S.-BOOKED AIR VOLUME:** \$55.9 million

**2013 U.S. T&E:** \$122.7 million

**2013 COMPANYWIDE T&E:** \$224 million

**PRINCIPAL SUPPLIERS:** Delta; Hilton; InterContinental; National; Sabre GetThere, Amadeus e-Travel; Oracle PeopleSoft; Citi

**CONSOLIDATED GLOBAL AGENCY:** Carlson Wagonlit Travel

Manufacturing conglomerate 3M's 2013 U.S.-booked air volume decreased nearly \$3 million from 2012.

The company in 2013 launched a global pre-trip approval system in 90 countries and began a global rollout of the SAP expense solution. 3M will continue implementing SAP in 2014 and further consolidate its agency partners.

Reflecting the deployment of its new travel systems, 3M revised its corporate policy in 2013 to require approval prior to booking airline tickets.

The global travel policy will be further updated to coincide with the rollout of the expense solution.

3M has 13,000 business travelers, and 60 percent of their travel is domestic.

Eighty-five percent of U.S.-booked air was completed via the company's online tools, and of those reservations, 53 percent required no assistance from agents. GetThere is used in the United States, and Amadeus e-Travel is used elsewhere.

Total sales for 3M in 2013 were \$30.9 billion, up from \$29.9 billion in 2012.

**83 EBAY**

**SAN JOSE, CALIF.**

**2013 U.S.-BOOKED AIR VOLUME:** \$55 million

**CONSOLIDATED U.S. AGENCY:** Carlson Wagonlit Travel

Online commerce giant eBay in 2013 increased its U.S.-booked air volume from the previous year by \$4 million to \$55 million. The company, which also includes several businesses such as PayPal, eBay Enterprise and StubHub, spent \$91 million on companywide airline tickets in 2013.

EBay's travel spending grew more than 50 percent during the past two years. With the travel department's efforts the company demonstrated cost avoidance.

Toward the end of 2012 the travel department conducted its first global airline request for proposals, and it put the program in place last year.

EBay also renewed its car rental contracts and reduced spending on ancillary charges. By creating a special book-to-bill hotel report, which includes agency and expense system data, it gave the company better insight and enhanced negotiating leverage. It uses Lanyon to issue RFPs for its hotel program and is working with the company to make process improvements for 2015.

The company not only uses Carlson Wagonlit Travel to provide

travel management services throughout the United States, but also in 29 other countries. In addition to using CWT for TMC services, the company also uses its consulting arm, including Carlson Air Solutions. EBay also uses International SOS for traveler security services.

EBay uses Deem for its online booking tool in the United States, where adoption is above 50 percent. For international locations, the company followed a course of choosing the best online tool on an individual market basis.

The company uses Concur as its expense tool for at least 95 percent of the globe.

It uses an AirPlus ghost card for airline purchases and the AirPlus MasterCard for other expenses.

**84 ROYAL PHILIPS**

**AMSTERDAM**

**2013 U.S.-BOOKED AIR VOLUME:** \$54 million

**2013 COMPANYWIDE AIR VOLUME:** \$155 million

**PRINCIPAL SUPPLIERS:** SkyTeam; Accor, Best Western, Hilton, InterContinental; Hertz; Sabre GetThere, Traveledoo; Concur; American Express

**CONSOLIDATED GLOBAL AGENCY:** American Express

Philips in 2013 reduced noncompliant spending, initiated an online booking tool in Latin America and rolled out a global meet-ings program.

The electronics and technology firm in 2014 planned to negotiate for a global car rental provider and travel management company.

Additionally, in 2013 Philips revised its advance-purchase policy for air travel. To garner cost savings in 2014, the company is considering revising policy further to encourage connections versus nonstop flights.

The company's 30,000 business travelers use GetThere in the United States and some countries in the Latin America and Asia/Pacific regions, and Traveledoo in Europe.

Philips' total 2013 U.S.-booked air volume increased nearly \$5 million from 2012.

**84 STRYKER**

**KALAMAZOO, MICH.**

**2013 U.S.-BOOKED AIR VOLUME:** \$54 million

**CONSOLIDATED U.S. AGENCY:** BCD Travel

Medical device and equipment manufacturer Stryker appears for the first time on this list on the heels of a 4 percent year-over-year increase in its 2013 revenue to \$9 billion. *BTN* estimates 2013 U.S.-booked air volume totaled \$57 million.

Stryker has pursued alternative transportation strategies as part of its social responsibility program, including pre-funded annual regional transportation passes in some European locations.

Stryker at the end of 2013 had about 25,000 employees, up from about 22,000 at the end of 2012.

**86 GLAXOSMITHKLINE****LONDON****2013 U.S.-BOOKED AIR VOLUME:** \$53.9 million**2013 COMPANYWIDE AIR VOLUME:** \$185.6 million**2013 U.S. T&E:** \$132 million**2013 COMPANYWIDE T&E:** \$364 million**PRINCIPAL SUPPLIERS:** American, United, US Airways; Hilton, Marriott, Starwood; Enterprise, National; Amadeus e-Travel, Deem; GEMS; American Express**CONSOLIDATED U.S. AGENCY:** BCD Travel

GlaxoSmithKline in 2013 saw a 14 percent decrease in U.S.-booked air from 2012, and expects further reductions for 2014.

In addition to realizing travel cost reductions, the pharmaceutical company in 2013 initiated a global online booking tool project and embarked on multiple contract negotiations. This year, GSK is continuing those efforts and is working to standardize the booking process while reducing travel overhead.

GSK in 2013 standardized its travel policy across pay grades, eliminating VIP-only-type perks.

Amadeus e-Travel is the company's primary booking tool outside of the United States; Deem (formerly called Rearden) is primary within the United States.

In 2013, 97 percent of the company's U.S.-booked air was reserved through the online tools, with 84 percent of those bookings requiring no assistance from agents.

The company's 9,400 travelers use BCD Travel's services in the United States; HRG and BCD Travel are the primary travel management companies elsewhere.

In December 2013, GSK announced that it would in 2014 "begin a consultative process towards stopping direct payments to health-care professionals for speaking engagements and for attendance at medical conferences."

**87 KOCH INDUSTRIES****WICHITA, KAN.****2013 U.S.-BOOKED AIR VOLUME:** \$53 million**2013 COMPANYWIDE AIR VOLUME:** \$68 million**PRINCIPAL SUPPLIERS:** Amadeus e-Travel, Concur Travel**CONSOLIDATED GLOBAL AGENCY:** BCD Travel

Diversified manufacturer Koch Industries in the past year consolidated travel management services globally with BCD Travel and continued to use an online booking tool from Concur in North America and Amadeus e-Travel in certain European countries.

The Koch companies in 2013 increased its U.S.-booked air volume \$5 million from the previous year.

Koch Industries is one of the largest private companies in the United States, with annual revenues of about \$115 billion.

With a presence in nearly 60 countries, Koch companies employ about 100,000 people worldwide, with about 60,000 of those in the United States.

**87 NESTLÉ****VEVEY, SWITZERLAND****2013 U.S.-BOOKED AIR VOLUME:** \$53 million**PRINCIPAL SUPPLIERS:** American, Delta, United; Hilton, Hyatt, Marriott; Avis Budget**CONSOLIDATED GLOBAL AGENCY:** BCD Travel

Nestlé in 2013 succeeded in bringing more transparency regarding compliance, spend and fees to its travel platform and brought more awareness to its key performance indicators. This year's goals unnecessary travel, more clearly defining lowest logical fare policies and bolstering compliance.

About 89 percent of Nestlé's 20,000 travelers booked their U.S. travel through the Concur online reservations tool, with 60 percent of those reservations requiring no assistance from travel agents.

**89 INTERPUBLIC GROUP OF COMPANIES****NEW YORK****2013 U.S.-BOOKED AIR VOLUME:** \$52.6 million**2013 COMPANYWIDE AIR VOLUME:** \$90.9 million**2013 U.S. T&E:** \$225 million**2013 COMPANYWIDE T&E:** \$299 million**PRINCIPAL SUPPLIERS:** American, Delta, United; Four Seasons, Kimpton, Marriott; Avis, Budget, Enterprise, Hertz, National; Amadeus e-Travel, Concur Travel; Concur Expense, SAP; American Express**CONSOLIDATED U.S. AGENCY:** American Express

The Interpublic Group of Companies in 2013 rolled out a 13-country business continuity plan, implemented a carbon emissions awareness policy and established online booking in China and Singapore.

As a result of online booking usage in Latin America, Asia/Pacific and the United States, the advertising company saw an increase in compliance to its air and hotel policies. (IPG travelers use Concur in the United States and Amadeus e-Travel Management in Europe, the Middle East and Africa.)

IPG's 2013 U.S.-booked air volume increased slightly from 2012.

American Express is the company's consolidated travel management company inside the United States and is the primary agency in Latin America and the Asia/Pacific region; HRG is primary in Europe, the Middle East and Africa.

IPG in 2013 integrated Taiwan, the Philippines and Thailand into the travel program. In 2014, IPG will add Canada to the program and establish online booking in both Canada and China, issuing usage mandates to all the newly integrated countries.

The company this year also plans to assess gamification options and issue corporate cards to those travelers presently without one.

IPG, which also has been tackling data privacy with its suppliers, in order to protect both intellectual and personal employee data, is now requiring suppliers to indemnify the company with \$10 million in the case of a data breach.

Interpublic's 26,495 travelers report their expenses via Concur in the United States and Concur or SAP outside of America.

## 90 21ST CENTURY FOX

NEW YORK

**2013 U.S.-BOOKED AIR VOLUME:** \$51.4 million

**2013 COMPANYWIDE AIR VOLUME:** \$57.9 million

**2013 U.S. T&E:** \$69.1 million

**PRINCIPAL SUPPLIERS:** American, British Airways, Delta, Virgin Atlantic; Enterprise, Hertz, National; Sabre GetThere; Concur Expense, Oracle PeopleSoft; American Express

**CONSOLIDATED U.S. AGENCY:** HRG

On July 1, 2013, 21st Century Fox was created after the former News Corp. split into two companies; 21st Century Fox is comprised of the former company's entertainment and media properties. The move separated the travel program into two entities.

Travel management goals for 2014 include renegotiating contracts for air and car rental and an online booking request for proposals. GetThere in 2013 was the company's primary booking tool.

While no travel policy changes occurred in 2013, 21st Century Fox anticipates additional restrictions on first-class travel in the transcontinental market in 2014.

Of its U.S.-booked air volume in 2013, 44 percent was for international travel.

## 91 PUBLICIS

NEW YORK

**2013 U.S.-BOOKED AIR VOLUME:** \$51 million

**PRINCIPAL SUPPLIERS:** American, Delta; Avis, Budget; American Express Axiom; Concur Expense, IBM Global Expense Reporting Solution; American Express

**CONSOLIDATED GLOBAL AGENCY:** American Express

U.S.-booked air volume at advertising and public relations firm Publicis increased \$3 million in 2013 from the previous year.

Publicis continued to use a hotel cap system, which it established in 2012, for each city in lieu of a preferred hotel program. A pre-trip authorization tool flags reservations at rates that exceed the cap.

The firm also uses its pre-trip approval system for nonpreferred airline and car rental suppliers. More aggressive than simply messaging those who seek to travel about videoconferencing room availability, the system flags travel on routes with origins and destinations where the firm has videoconferencing rooms and requires travelers to file a reason for not using them.

The global consolidation of travel management services, which in 2011 replaced several agencies with American Express in 80 countries, has since expanded to include more than 100 countries. In the United States, the firm has 21,000 employees and 18,000 travel profiles.

In 2012, Publicis mandated that all point-to-point travel was to be booked through its online booking tool, American Express' Axiom. In doing so, the company reached 90 percent online booking adoption. That rate has risen a bit last year and this year and now is at about 95 percent.

A would-be merger between Publicis and fellow CT100 company Omnicom put some travel program plans last year on hold. While the merger was canceled in May 2014, those plans will remain on hold as the company moves to implement a new SAP enterprise resource planning system that will replace the currently used combination of Concur and IBM GERS for expense management.

The rollout of the new ERP system will begin in October 2014, though that first wave will include only a select few advertising agencies. More will be added in January and the rest in April 2015.

## 92 E. I. DU PONT DE NEMOURS

WILMINGTON, DEL.

**2013 U.S.-BOOKED AIR VOLUME:** \$50 million

**COMPANYWIDE AIR VOLUME:** \$101 million

**U.S. T&E:** \$148 million

**COMPANYWIDE T&E:** \$275 million

**PRINCIPAL SUPPLIERS:** Delta, United, US Airways; InterContinental, Marriott, Starwood; Enterprise, Hertz, National; Concur Travel, Cytric iFAO; Concur Expense; American Express

**CONSOLIDATED U.S. AGENCY:** BCD Travel

DuPont in 2013 completed a divestiture of its performance coating business, separating it from its travel program. The company also completed an in-depth benchmarking effort for its travel program.

In 2014, the company will assess the role of mobile technologies in its travel management program, as well as pre- and post-trip messaging to improve compliance with preferred suppliers.

While no changes were made to travel policy in 2013, DuPont this year will review methods of managing additional ancillary fees.

BCD Travel is DuPont's consolidated U.S. agency, but HRG is used outside the United States.

The company's 12,800 travelers book their travel via Concur in the United States; outside the U.S., travelers use Cytric iFAO. Seventy percent of total 2013 U.S. air volume was booked online in 2013; 60 percent of that was booked without any agent assistance.

## 92 JOHNSON CONTROLS

MILWAUKEE, WIS.

**2013 U.S.-BOOKED AIR VOLUME:** \$50 million

**2013 COMPANYWIDE AIR VOLUME:** \$105 million

**2013 U.S. T&E:** \$130 million

**2013 COMPANYWIDE T&E:** \$280 million

**PRINCIPAL SUPPLIERS:** Delta, United; Hilton, InterContinental; Enterprise, National; Amadeus e-Travel, Concur Travel; Infor; U.S. Bank, Citi

**CONSOLIDATED GLOBAL AGENCY:** American Express

Johnson Controls returns to the Corporate Travel 100 list after a one-year absence. The multi-industrial manufacturing company in 2013 focused on a global initiative targeting travel program savings and compliance. The company's global travel policy was updated to standardize business-class and online booking usage, and the travel

department implemented tools to drive compliance. The end result was more than \$10 million in savings during a nine-month period.

Travel policy was simplified with the addition of mandates. Johnson Controls mandated use of online tools for all domestic and simple international reservations and updated its air policy to allow business class globally only for travel to or from Asia or single flights of at least 12 hours in duration. The company tested and began rolling out a global policy exception process for trips that are not booked online, aren't booked at the lowest logical airfare or are booked within seven days of departure.

Johnson Controls this year is continuing to push online adoption and bolster compliance to its airfare policies.

In 2013, 85 percent of Johnson Controls' air volume in the United States was booked via Concur, with 84 percent of those bookings requiring no agent assistance. Company travelers based outside the United States mostly use Amadeus e-Travel for online booking. The company's 25,000 business travelers all use Infor's Extensity for their expense reporting needs.

## 92 MOTOROLA SOLUTIONS

SCHAUMBURG, ILL.

**2013 U.S.-BOOKED AIR VOLUME:** \$50 million

**CONSOLIDATED GLOBAL AGENCY:** American Express

Motorola Solutions in 2013 strengthened its travel policy and emphasized the use of the company's preferred suppliers. The telecommunications equipment company improved compliance and savings as a result.

Motorola Solutions this year plans to continue to tighten policy to bolster compliance and derive further savings, and also will assess a duty-of-care program and review its advance-booking policies.

## 95 CONOCOPHILLIPS

HOUSTON

**2013 U.S.-BOOKED AIR VOLUME:** \$49.4 million

**2013 COMPANYWIDE AIR VOLUME:** \$90 million

**2013 U.S. T&E:** \$100 million

**PRINCIPAL SUPPLIERS:** Air Canada, Delta, United; InterContinental, Hilton, Marriott; Avis, Enterprise, National; Amadeus e-Travel, Sabre GetThere; SAP; JPMorgan Chase

**CONSOLIDATED U.S. AGENCY:** American Express

In the first full year after spinning off its marketing and chemical operations into Phillips 66, ConocoPhillips increased its U.S.-booked air volume 6.5 percent year over year. U.S. T&E spending increased more than 11 percent.

The energy exploration and production company, which has about 10,000 traveling employees, in 2013 renegotiated three global airline contracts and renewed four local airline agreements.

This year, ConocoPhillips aims to rationalize its preferred supplier programs.

ConocoPhillips uses American Express as its consolidated agency

within the United States and Canada, and all ticketing is done from the United States. American Express also is the company's primary agency in Australia and Singapore, and other TMCs handle volume elsewhere in the world.

U.S. travelers book through GetThere, and 49 percent of U.S.-booked airline tickets were made through the tool in 2013. Employees outside of the United States primarily use the Amadeus e-Travel tool to book travel.

U.S. travelers pay for expenses on cards issued by JPMorgan Chase, and ConocoPhillips uses SAP globally for expense reporting.

## 96 AON

LONDON

**2013 U.S.-BOOKED AIR VOLUME:** \$49.1 million

**CONSOLIDATED U.S. AGENCY:** Carlson Wagonlit Travel

Insurance and professional services firm Aon in 2013 generated about \$11.8 billion in total revenue, almost 3 percent higher than it did in 2012. Aon's 2013 U.S.-booked air volume increased a few million dollars from 2012 levels.

Aon has invested in remote conferencing technology and encouraged its use as an alternative to air and car travel.

The company at the end of 2013 had about 66,000 employees, about 23,000 of whom work in the United States.

## 97 COCA-COLA

ATLANTA

**2013 U.S.-BOOKED AIR VOLUME:** \$48.6 million

**2013 COMPANYWIDE AIR VOLUME:** \$104 million

**PRINCIPAL SUPPLIERS:** American, Delta, United; Hilton, InterContinental, Starwood; Hertz; Concur Travel, Deem; SAP; American Express

**CONSOLIDATED U.S. AGENCY:** Carlson Wagonlit Travel

Coca-Cola cut its U.S.-booked air volume about 5 percent year over year in 2013, though the beverage giant expects its volume this year will surpass 2012 levels.

The company in 2013 controlled costs by applying procurement sourcing methodology across all travel categories and subcategories. This year, it is focusing on improving compliance to its travel policy as well as the coverage and use of its supplier agreements. Coca-Cola also is evaluating its global air policy vis-à-vis airfare structures in global points of sale.

Much of Coca-Cola's travel outside of the United States is consolidated with American Express, though HRG also manages some of its business. In addition, American Express supplies corporate cards for Coca-Cola travelers, per a five-year agreement that began in 2010.

Coca-Cola uses Deem as a booking tool in the United States, while travelers outside the United States book on the Concur platform. The company's 25,000 travelers report expenses through SAP globally.

**98 BOSTON SCIENTIFIC**

**MARLBOROUGH, MASS.**

**2013 U.S.-BOOKED AIR VOLUME:** \$48 million

**2013 COMPANYWIDE AIR VOLUME:** \$73 million

**2013 U.S. T&E:** \$182 million

**2013 COMPANYWIDE T&E:** \$227 million

**PRINCIPAL SUPPLIERS:** Delta, United; Hilton, Marriott, Starwood; Hertz; Concur Travel, KDS; Citi

**CONSOLIDATED GLOBAL AGENCY:** American Express

With \$48 million in U.S.-booked air volume, medical device supplier Boston Scientific in 2013 continued travel program globalization efforts.

American Express serves as the company's global consolidated agency, and Boston Scientific in 2013 expanded its program to include Costa Rica, Ireland and Russia. The company last year implemented an online booking tool in China as well as an online booking tool for healthcare professionals. Boston Scientific uses Concur as its primary booking tool in the United States and KDS as its primary tool outside the United States.

In 2013, the company also implemented a global T&E card, issued by Citi.

**99 CHURCH OF JESUS CHRIST OF LATTER-DAY SAINTS**

**SALT LAKE CITY, UTAH**

**2013 U.S.-BOOKED AIR VOLUME:** \$47.2 million

**CONSOLIDATED U.S. AGENCY:** Carlson Wagonlit Travel

According to *BTN* estimates, the Church of Jesus Christ of Latter-Day Saints' 2013 U.S.-booked air volume was \$47.2 million.

The church in August 2014 completed an airline request for proposals and expects to have contracts in place by the end of September. The organization this year also will work to globalize its reporting.

The church continues to use teleconferencing and videoconferencing whenever possible to increase efficiencies. While the organization pays for business travelers' checked bags regardless of how many bags they have, it advises travelers to stay within an airline's free-bag policy.

**100 AT&T**

**DALLAS**

**2013 U.S.-BOOKED AIR VOLUME:** \$47 million

**CONSOLIDATED U.S. AGENCY:** American Express

*BTN* estimates AT&T's 2013 U.S.-booked air volume decreased 11 percent year over year to \$47 million.

AT&T's 2013 operating revenue grew 1.9 percent to \$128.8 billion compared with \$127.4 billion in 2012. The telecommunications firm in 2013 increased its employees to 243,360, up from 241,819 in 2012.

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