

# BTN

BUSINESS TRAVEL NEWS

September 26, 2016



# 2016 CORPORATE TRAVEL 100

**FOLLOWING THE TRAIL OF  
THE BIGGEST CORPORATE TRAVEL  
SPENDERS IN THE UNITED STATES**

- \$11.3 Billion: Amount the CT 100 Spent on U.S.-Booked Airline Tickets in 2015
- Oil & Gas Companies Continue to Slide
- M&A Activity Sparks Major Moves

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# M&A ACTIVITY SPARKS BIG CHANGES IN ANNUAL CT 100

BY ELIZABETH WEST

**M**ergers and acquisitions—as well as spinoffs and splits—mark *BTN*'s 29th annual list of the top corporate travel spenders in the United States. Allergan, previously known as Actavis, debuts at No. 44 on the Corporate Travel 100—after a March 2015 merger with the so-called “legacy Allergan” doubled Actavis’ net revenue to \$15 billion—with a *BTN* estimated 2015 United States-booked air spend of \$90 million. Watch closely, though. That ranking may slip significantly next year, as Allergan almost immediately divested its generic pharmaceuticals business to Teva Pharmaceuticals in August. French company Philips completed its split into separate healthcare and lighting companies; as a result, neither made *BTN*'s list of big travel spenders.

The tech industry has been active, as well. While Cisco, Microsoft, Oracle and other big technology names made similar showings compared to *BTN*'s 2015 list, Hewlett Packard split in two, breaking out Hewlett Packard Enterprise and HP Inc. While HPE remained in the Corporate Travel 100 this year, HP Inc. narrowly missed. HPE announced plans

in May to spin off its Enterprise Services business as a standalone IT services firm, so that transformation is far from finished. Ebay, a CT 100 staple for the last three years spun PayPal off as a standalone company last July and dropped out of the annual list.

## LOW ENERGY ENVIRONMENT

As tech and pharma spark change throughout the CT 100, the energy sector is burning its way down. After the sharp decline in oil prices, a couple of CT 100 mainstays have dropped off the 2016 list: ConocoPhillips and Paris-based Schlumberger. BP hung on at No. 90 this year, sinking from No. 62 the year prior. Industry giant ExxonMobil stayed securely on the list at No. 14 but descended five places upon *BTN*'s estimate that the company cut \$50 million in United States-based airline spend.

## GREAT EXPECTATIONS FOR 2017

Telecom network equipment maker Nokia merged with Alcatel-Lucent in January. Watch for that joined company on next year's list. And while Dell dropped from No. 48 last year to No. 67 this year, the computer hardware company acquired EMC, this year's

## CORPORATE TRAVEL 100 U.S. ACCOUNTS, BY AGENCY

Agency	CT 100 U.S. Accounts
American Express GBT	30
BCD Travel	26
Carlson Wagonlit Travel	22
HRG	6
Other*	4
No single primary agency/ undisclosed	14

\* Includes two client accounts with Travel & Transport, one with ATG and one with Egencia

Note: This chart includes companies listed in *BTN*'s Corporate Travel 100 for which *BTN* identified a single consolidated U.S. or global agency. Due to a three-way tie at No. 100, there are 102 companies in this year's CT 100.

No. 62, in early September in a historic \$60 billion deal to create the largest technology company in the world. The new Dell Technologies will surge in the 2017 rankings. Also in September, Bayer, No. 66 this year, agreed to acquire agricultural firm Monsanto for \$66 million.

## METHODOLOGY

The CT 100 is based on 2015 air tickets purchased for domestic or international business travel at all U.S. points of sale. Most organizations listed 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. In their online questionnaires, respondents were asked to list their organization's highest-volume suppliers and other preferred suppliers in the United States and in other regions; their responses are included by supplier category and alphabetically in the listings as “principal suppliers.” ■

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Global Hotel Solutions



Dear Travel Management Professional,

Corporate lodging represents nearly 1/3 of your overall budget, and this year presents a number of compelling challenges and opportunities as we look toward 2017.

Industry consolidation has accelerated over the past year, giving suppliers new pricing power in a wide range of vital city centers. Capitalizing on loyalty programs, hotels have reached out directly to business travelers, sometimes undercutting negotiated rates and further complicating duty-of-care and data tracking issues.

On the opportunity front, travel buyers have access to a broad range of tools and services that drive new transparency to hotel procurement. New breadth and depth of data give unprecedented insight to travel managers. Intuitive solutions nudge business travelers to book and travel within policy, while at the same time cutting process costs.

At HRS, we understand the high wire act of today's travel manager, balancing savings and business traveler satisfaction. CFOs in many companies continue to press for cost savings and spending optimization, while HR leaders strive for retention of the company's most productive road warriors.

The good news is that HRS can help provide the balance you need around savings and traveler satisfaction. HRS offers innovative solutions, from great independent hotel content to sourcing to payments, spanning the entire corporate hotel procurement cycle. With 3,000 multinational corporate customers worldwide, we've got a track record of success. And, our dedicated team of hotel experts stand ready to help you provide the best hotel program to balance your company's objectives.

We are pleased to sponsor this *Business Travel News* Corporate Travel 100 issue. Given the past 12 months of HRS's successful expansion in North America, we want to thank our customers for your continued trust and partnership. We look forward to working with more of you in the months ahead.

Sincerely,

Suzanne Neufang  
Vice President Americas  
HRS – Global Hotel Solutions



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Dear Travel Partner,

Our team has always counted on *Business Travel News* as an invaluable resource, which is why Starwood is proud to again sponsor the *BTN* Corporate Travel 100 issue.

Certainly, it's been an eventful year for Starwood as we prepare to join with Marriott International to form the world's largest hotel company. With our combined leading brands, we are creating an exciting future for customers and the next generation traveler. We'll be able to deliver even more choices in more places, giving you access to 1.1 million rooms across 5,500 hotels in more than 100 countries. Our teams will also work together to create the strongest loyalty program in the business—leveraging the very best of what we offer today.

Of course, Starwood is continuing to smartly invest across our portfolio. One brand leading the charge is Sheraton, which last year announced its Sheraton 2020 initiative to innovate the guest experience with unique premium sleep, entertainment, fitness, and bath experiences, as well as invigorated food and beverage options.

Upgrading to Sheraton Club at Sheraton delivers a higher level of comfort, complete with complimentary breakfast and premium food selections in the Club lounge—and complimentary Internet both in-room and in the lounge.

Sheraton Grand, our new premier tier, offers distinguished designs, and excellence in service and guest experiences. Currently at more than 25 properties globally, we expect to have 100+ Sheraton Grand properties by 2020. In addition, we plan to further strengthen the Sheraton brand by adding 150 new Sheraton hotels by the same year.

As we prepare to bring together the best of Starwood and Marriott, thank you for taking this journey with us, and thank you as always for your partnership.

Sincerely,

Peter Foreman  
Vice President, Global Corporate Sales  
Starwood Hotels & Resorts



To Our Valued Corporate Business Partners,

For companies featured in the Corporate Travel 100 issue and all those businesses with which we're fortunate enough to partner, thank you for your loyalty and trust. All of us at United are grateful for your business and we're working hard every day to take care of your travelers.

Marking the best six months of on-time performance in our combined company history, we finished either first or second in on-time arrivals among the three global U.S. network carriers every month in the first half of 2016. In addition, we've recorded our best customer satisfaction and baggage handling metrics since the merger and will continue to deliver on our performance commitments as part of the Global Performance Guarantee program.

We're excited about the recent launch of our new, industry-leading TMC/agency self-service booking options, adding even more flexibility and choices for agencies to support corporate travelers. It's all about making sure our customers are as productive, efficient and well taken care of while on the road.

We also announced our enriched United Services Fund program, boasting value-add and servicing options never before offered to our contracted corporate clients. Next up is introducing our new generation online Sales portal which will provide a very robust suite of tools and reports for both corporations and TMCs.

Being easy to do business with is our commitment to you as clients of United and the focus of all of our sales professionals around the world. We hope you are hearing from your employees and travelers about all the great things they're seeing in the Friendly Skies.

You trust us to deliver safety, comfort and results, and we are investing where it matters most to make sure that happens.

Sincerely,

Dave Hilfman  
Senior Vice President – United Worldwide Sales  
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# 2016 CORPORATE TRAVEL 100 AT A GLANCE

## RANKED BY 2015 UNITED STATES-BOOKED AIR VOLUME

1	IBM	\$490M	50	The Church of Jesus Christ of Latter-Day Saints	\$80M
2	Deloitte	\$471.4M	50	P&G	\$80M
3	Boeing	\$309.3M	53	Intel	\$79.2M
4	GE	\$300M	54	Time Warner	\$78.7M
5	PwC	\$291.3M	55	Coca-Cola	\$78M
6	Apple	\$290M	55	Facebook	\$78M
7	Accenture	\$264M	57	Credit Suisse	\$77M
8	EY	\$250.6M	57	International Monetary Fund	\$77M
9	McKinsey & Co.	\$224M	59	Sanofi	\$74.4M
10	Lockheed Martin	\$217.9M	60	UBS	\$73M
11	Oracle	\$212.9M	61	Koch	\$72.6M
12	Microsoft	\$202M	62	EMC	\$72M
13	The World Bank	\$193M	63	UnitedHealth Group	\$71.8M
14	ExxonMobil	\$185.6M	64	Honeywell	\$71M
15	Johnson & Johnson	\$182.9M	64	Omnicom Group	\$71M
16	Bank of America	\$180M	66	Bayer	\$67.5M
17	KPMG	\$167M	67	Dell	\$67M
18	Wells Fargo	\$159M	68	Walmart	\$66M
19	Citi	\$158M	69	Marsh & McLennan Cos.	\$64.5M
20	JPMorgan Chase & Co.	\$153M	70	Toyota Motor Sales U.S.A.	\$64.4M
21	Roche	\$150M	71	Morgan Stanley	\$63.8M
22	The Walt Disney Co.	\$142M	72	L-3	\$63.3M
23	Google	\$140M	73	Danaher	\$63M
24	IPG	\$133M	74	Johnson Controls	\$61.6M
25	Hewlett Packard Enterprise	\$131M	75	Barclays	\$60M
26	Cisco	\$130M	76	Fidelity	\$59.5M
27	Siemens	\$125M	77	Lilly	\$59M
28	Comcast	\$116M	77	Verizon	\$59M
29	Raytheon	\$113.1M	79	BASF	\$58M
30	BCG	\$113M	80	Deutsche Bank	\$57.6M
31	Amazon	\$110M	81	Allstate	\$57M
32	Medtronic	\$109M	81	Samsung	\$57M
33	FedEx	\$108M	83	21st Century Fox	\$54.4M
34	Northrop Grumman	\$106.8M	84	McKesson	\$54M
35	Novartis	\$106.7M	85	Aon	\$53.7M
36	United Technologies	\$104M	86	Amgen	\$53.5M
37	Abbott	\$102M	87	Nestle	\$52M
38	General Motors	\$101M	87	WPP	\$52M
39	Merck	\$100M	89	Publicis Worldwide	\$51.2M
39	PepsiCo	\$100M	90	BP	\$51M
39	SAP	\$100M	91	Boston Scientific	\$50.3M
42	Nike	\$95M	92	Kiewit	\$50M
42	Pfizer	\$95M	93	Viacom	\$49.3M
44	Allergan	\$90M	94	Emerson	\$49M
44	Goldman Sachs	\$90M	94	ITW	\$49M
46	General Dynamics	\$89M	96	AIG	\$47.7M
47	TPG	\$85M	97	Stryker	\$46.2M
48	Royal Dutch Shell	\$84M	98	3M	\$46M
49	Chevron	\$82.3M	99	Liberty Mutual	\$45.7M
50	AbbVie	\$80M	100	Caterpillar	\$45M
			100	GSK	\$45M
			100	UPS	\$45M

## ALPHABETIZED WITH RANKING

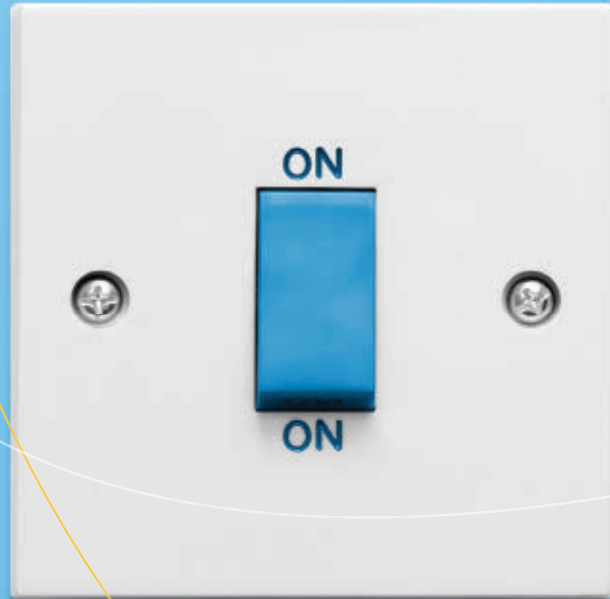
3M	98	IPG	24
21st Century Fox	83	ITW	94
Abbott	37	Johnson & Johnson	15
AbbVie	50	Johnson Controls	74
Accenture	7	JPMorgan Chase & Co.	20
AIG	96	Kiewit	92
Allergan	44	Koch	61
Allstate	81	KPMG	17
Amazon	31	L-3	72
Amgen	86	Liberty Mutual	99
Aon	85	Lilly	77
Apple	6	Lockheed Martin	10
Bank of America	16	Marsh & McLennan Cos.	69
Barclays	75	McKesson	84
BASF	79	McKinsey & Co.	9
Bayer	66	Medtronic	32
BCG	30	Merck	39
Boeing	3	Microsoft	12
Boston Scientific	91	Morgan Stanley	71
BP	90	Nestle	87
Caterpillar	100	Nike	42
Chevron	49	Northrop Grumman	34
The Church of Jesus Christ of Latter-Day Saints	50	Novartis	35
Cisco	26	Omnicom Group	64
Citi	19	Oracle	11
Coca-Cola	55	P&G	50
Comcast	28	PepsiCo	39
Credit Suisse	57	Pfizer	42
Danaher	73	Publicis Worldwide	89
Dell	67	PwC	5
Deutsche Bank	80	Raytheon	29
EMC	62	Roche	21
Emerson	94	Royal Dutch Shell	48
ExxonMobil	14	Samsung	81
EY	8	Sanofi	59
Facebook	55	SAP	39
FedEx	33	Siemens	27
Fidelity	76	Stryker	97
GE	4	Time Warner	54
General Dynamics	46	Toyota Motor Sales U.S.A.	70
General Motors	38	TPG	47
Goldman Sachs	44	UBS	60
Google	23	United Technologies	36
GSK	100	UnitedHealth Group	63
Hewlett Packard Enterprise	25	UPS	100
Honeywell	64	Verizon	77
IBM	1	Viacom	93
Intel	53	Walmart	68
International Monetary Fund	57	The Walt Disney Co.	22
		Wells Fargo	18
		The World Bank	13
		WPP	87

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# 1 IBM

## ARMONK, N.Y.

**2015 U.S.-Booked Air Volume:** \$490 million

**Principal Air Suppliers:** American, Delta

**Principal Hotel Suppliers:** Hilton, Marriott

**Principal Car Rental Suppliers:** Avis, Hertz

**Principal Online Booking Tool:** Concur Travel

**Principal Card Supplier:** American Express

**Principal Expense Supplier:** Concur Expense

**Consolidated Global TMC:** American Express Global Business Travel

BTN estimates IBM's U.S.-booked air volume decreased by \$80 million in 2015. Even so, the technology and consulting heavyweight, with \$2 billion in T&E last year, maintained its position as the largest corporate buyer of U.S.-booked air travel.

In 2014, IBM decided it would stop operating its Global Expense Reporting Solution as a standalone product in March 2016 and would shift its expense platform to Concur. Also in 2014, it began a six-year contract to use the Orbitz for Business booking tool. The next year, though, Egencia announced it would acquire and sunset Orbitz for Business. Considering those developments, IBM signed a global deal to combine T&E under Concur. IBM's use of the Orbitz for Business tool will come to a complete stop on Dec. 1, and by year-end, Concur will roll out in 33 countries. The company will launch Concur in the United States in January. It plans to roll out the travel tool to all 99 countries where it has offices and the expense tool to all 112 countries where it does business by January 2018.

IBM also will introduce an internal social network, Travel@IBM. Last year, the travel program and the company's research division began working on an intelligence tool for called IBM Travel Manager to help the travel team manage contracts, and they plans to complete development this year. In 2015 and 2016, the company has conducted internal surveys and interviews, talked with 20 corporate peers and worked with Concur and the IBM global client group to create a policy survey that it will use to benchmark and establish policy parameters. The travel team also plans to work with American Express to improve its strategic approach as it renews its card and travel agreements. IBM's security, HR and travel procurement teams work with American Express Global Business Travel on duty of care. Travelers also have mobile access to International SOS, iJet or the TMC. The travel team put its mobile strategy on the backburner, though use of mobile devices for booking and itinerary management has increased. IBM, with Concur and Amex GBT, will refocus on this area in the fourth quarter.

# 2 DELOITTE

## NEWYORK CITY

**2015 U.S.-Booked Air Volume:** \$471.4 million

**2015 U.S. T&E:** \$1.4 billion

**Principal Air Suppliers:** American, Delta, United

**Principal Hotel Suppliers:** Hilton, Marriott, Starwood

**Principal Car Rental Suppliers:** Avis, Budget

**Principal Online Booking Tool:** Sabre GetThere

**Principal Card Supplier:** American Express

**Consolidated U.S. TMC:** BCD Travel

Deloitte U.S. firms increased U.S.-booked air volume by more than \$25 million in 2015 and the company is on track for similar growth in 2016. During 2015, it achieved air, lodging and ground savings via sourcing and

demand management. The firm reached its highest-ever online adoption, and downloads of its mobile booking app increased steadily. It also added a dedicated traveler experience manager for its 75,000 travelers. Deloitte is introducing point-of-sale tools and online biasing to improve demand management, implementing an automated pre-trip rate and a fare-optimization process and focusing on management reporting. Sixty-five percent of bookings went through the approved booking tool in 2015, and 74 percent required no agent assistance. Deloitte uses an individual bill, central pay card model and an internal expense reporting system customized through SAP.

# 3 BOEING

## CHICAGO

**2015 U.S.-Booked Air Volume:** \$309.3 million

**2015 Global Air Volume:** \$333.1 million

**Principal Hotel Suppliers:** Hilton, InterContinental, Marriott

**Principal Car Rental Suppliers:** Avis, Budget

**Principal Online Booking Tool:** Concur Travel

**Principal Card Supplier:** Citi

**Principal Expense Supplier:** Concur Expense

Boeing, which is a Corporate Travel Department, stopped contracting out its travel management services to other companies a few years ago. In 2015, it served 87,000 employees of Boeing and its subsidiaries, and they spent a sliver more on U.S.-booked air volume than in 2014. Of the U.S.-point-of-sale flights, 93 percent are made through Boeing's approved online tool, and 69 percent of those were done without agent assistance.

In 2015, it brought more international locations and subsidiaries under the CTD. It also upgraded its Concur travel and expense tools and renewed its contract with that supplier and its contract with its global distribution system. It updated its policy to cover monthly inflight Wi-Fi subscriptions and to allow hotel room upgrades given a valid business justification.

This year, it aims to reduce the nonrefundable ticket credits that expire, bring more non-U.S. locations under the CTD umbrella, consolidate group/meetings bookings, implement new mid-office tools and reduce travel costs by 25 percent. The company expects U.S.-booked air volume to drop to \$292.5 million this year. Boeing is updating travel policy to disallow executives who have corporate cars from expensing mileage on privately owned vehicles. It's also fixing a booking tool glitch that prevented travelers eligible for first class airfare from voluntarily downgrading to business class; the system previously offered only coach as an alternative. From 2014 to 2015, Hilton and Marriott remained as primary hotel suppliers for Boeing, but InterContinental stepped into Hyatt's place.

# 4 GENERAL ELECTRIC

## FAIRFIELD, CONN.

**2015 U.S.-Booked Air Volume:** \$300 million

**Principal Air Suppliers:** American, Delta, United

**Principal Hotel Suppliers:** Hilton, InterContinental, Marriott

**Principal Car Rental Supplier:** Hertz

**Principal Online Booking Tool:** Sabre GetThere

**Principal Card Supplier:** American Express

**Principal Expense Supplier:** Concur Expense

**Consolidated Global TMC:** Carlson Wagonlit Travel

In 2015, General Electric decreased its U.S.-booked air volume by \$20



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million from 2014. Seventy percent of the company's U.S. air tickets were for international travel. It expects a similar volume this year. Last year, GE centralized its global air RFP. This year, it plans to centralize meetings spend. The travel program, which serves 180,000 business travelers, maintained its preferred suppliers from 2014, including the global providers with whom it pioneered the one global distribution system (Sabre)/one booking tool/one TMC/one corporate card approach. Eighty percent of bookings went through the Sabre GetThere tool. The company uses an individual bill, central pay model.

## 5 PWC

### NEW YORK CITY

**2015 U.S.-Booked Air Volume:** \$291.3 million

**2015 U.S. T&E:** \$846 million

**2015 Global T&E:** \$900 million

PwC saw its U.S.-booked air volume jump last year from \$277 million in 2014. In 2016, it is focused on cost management, meetings and travel management program synergy and new sourcing approaches. Administrators of PwC's corporate travel program have worked for years to understand and improve the business traveler experience by way of focus groups, surveys and internal social media. It has strived to reduce traveler friction and enhance productivity and efficiency on the road while curbing travel costs. In the past two years, it has implemented a foreign language translation app and hosted TSA PreCheck and Global Entry enrollments. PwC and its TMC also launched instant messaging with travel agents and have expanded that to in-trip support. The TMC also monitors itineraries for disruptions and automatically reaches out to those travelers with reaccommodation options. PwC expects that service to be active firmwide this year. Last year, PwC negotiated a flat-fee TMC rate structure that focuses on quality of service. PwC also implemented an automated hotel-rate shopping service in 2015. It is reviewing air travel and other guidelines this year.

## 6 APPLE

### CUPERTINO, CALIF.

**2015 U.S.-Booked Air Volume:** \$290 million

**Consolidated U.S. TMC:** BCD Travel

After Apple increased its employees and its long-haul business travel in its 2015 fiscal year, *BTN* estimates that its calendar-year 2015 U.S.-booked air volume increased to \$290 million. Apple's Scope 3 greenhouse gas emissions generated from business travel in the fiscal year that ended Sept. 26, 2015, increased to nearly 140,000 metric tons of carbon dioxide equivalent, up from 111,000 in its prior fiscal year. The company had about 110,000 full-time-equivalent employees in September 2015, up from 92,600 a year earlier. According to Bloomberg, Apple selected on-demand transportation provider Lyft as a preferred provider in 2016. Apple's strategic meetings management program is in its sixth year of operation. The company works with Carlson Wagonlit Meetings & Events for meetings management services and continues to operate an Airlines Reporting Corp.-accredited Corporate Travel Department configuration, with BCD Travel providing service in the United States and some other countries. Apple is one of the largest companies to operate such a configuration. Its 2015 fiscal year revenue increased to \$233.7 billion from \$182.8 billion one year earlier. Net income increased to \$53.4 billion from \$39.5 billion.

## 7 ACCENTURE

### DUBLIN

**2015 U.S.-Booked Air Volume:** \$264 million

**2015 Global Air Volume:** \$531 million

**2015 U.S. T&E:** \$443 million

**2015 Global T&E:** \$883 million

**Principal Air Suppliers:** American, Delta, United

**Principal Hotel Suppliers:** Hilton, InterContinental, Marriott, Starwood

**Principal Car Rental Suppliers:** Avis, Hertz

**Principal Online Booking Tool:** Sabre GetThere

**Principal Expense Supplier:** myTimeandExpenses

**Principal Card Supplier:** American Express

**Consolidated Global TMC:** Carlson Wagonlit Travel

Accenture increased its U.S.-booked air volume and T&E spending 6 percent in 2015. Last year, it introduced global business travel insurance and a program to monitor airfares. It deepened its expense and travel integration and launched a hotel extended-stay service. Accenture will finish a redo of its travel support model this year, is improving traveler engagement and is enhancing its mobile strategy. Boosting adoption of preferred mobile applications had been a 2015 goal. Travelers book through Sabre's GetThere tool globally. Accenture maintained an adoption rate of 94 percent for that tool in U.S.-booked air travel in 2015.

## 8 EY

### LONDON

**Fiscal Year 2015 U.S.-Booked Air Volume:** \$250.6 million

**2015 Global Air Volume:** \$543.4 million

**2015 U.S. T&E:** \$797.9 million

**2015 Global T&E:** \$1.8 billion

**Principal Air Suppliers:** American, Delta, United

**Principal Hotel Suppliers:** Hilton, Marriott, Starwood

**Principal Car Rental Suppliers:** Hertz, National

**Principal Online Booking Tool:** Sabre GetThere

**Principal Card Supplier:** American Express

**Principal Expense Supplier:** Proprietary tool

**Consolidated U.S. TMC:** American Express Global Business Travel

In its 2016 fiscal year, which ended June 30, EY decreased its U.S.-booked air volume by \$23.1 million. During 2015, the organization implemented pre-trip approval for international travel from the U.S. and deployed online booking tools in additional countries. It also introduced project rate desks, expanded its GSS support team, focusing on advance purchase behaviors and enhanced analytics capabilities using Spotfire. EY also simplified its meal allowance policy. This year, EY has targeted indirect cost reduction and TMC compliance, particularly for hotel reservations. The travel team will increase consideration of EY's business goals in shaping travel strategy. It also plans to alter and clarify its ground transportation policy.

CWT and HRG support non-U.S. regions. Last year, EY consolidated TMCs in Tier 2 markets. The travel program uses Amadeus eTravel Management outside the United States, with local systems in China and Brazil. American Express supplies individual bill, individual pay corporate cards to EY's 35,000 U.S. travelers.

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## 9 MCKINSEY & CO.

### LONDON

**2015 U.S.-Booked Air Volume:** \$224 million

**Consolidated U.S. TMC:** American Express Global Business Travel

Estimates for 2015 revenue and employment figures for privately held management consulting firm McKinsey & Co. are slightly higher than 2014 levels, as is *BTN*'s estimate of McKinsey's 2015 U.S.-booked air volume. The company deployed a remote conferencing network widely. *Forbes* estimates McKinsey's 2015 revenue at \$8.4 billion, up from \$8 billion in 2014. McKinsey employed more than 20,000 people in 2015, about 1,000 more than it did the prior year.

## 10 LOCKHEED MARTIN

### BETHESDA, MD.

**2015 U.S.-Booked Air Volume:** \$217.9 million

**2015 Global Air Volume:** \$234.9 million

**2015 U.S. T&E:** \$422.6 million

**2015 Global T&E:** \$439.6 million

**Principal Air Suppliers:** American, Delta, United

**Principal Hotel Suppliers:** Hilton, InterContinental, Marriott

**Principal Car Rental Supplier:** Avis

**Principal Online Booking Tool:** Sabre GetThere

**Principal Expense Supplier:** Concur Expense

**Consolidated Global TMC:** BCD Travel

Lockheed Martin uses Sabre GetThere for booking but launched Concur Travel in the United States in May and is expected to launch in Australia in December and in Canada sometime next year. It uses Concur Expense everywhere except in Australia and Canada. In 2015, it also implemented Cvent. With more insight into spend, the company's U.S.-booked air volume decreased 7 percent in 2015 and is expected to decrease to \$210 million next year. Lockheed Martin added more Holiday Inn Express properties into its travel program, which increased its spend with InterContinental Hotels Group. The company has 40,000 travelers.

## 11 ORACLE

### REDWOOD SHORES, CALIF.

**2015 U.S.-Booked Air Volume:** \$212.9 million

**Principal Online Booking Tool:** Sabre GetThere

**Principal Card Supplier:** American Express

**Principal Expense Supplier:** Oracle Internet Expenses

**Consolidated Global TMC:** Carlson Wagonlit Travel

In 2015, Oracle worked toward dynamically priced hotel agreements for certain brands. It also improved compliance to its lowest-logical-airfare policies and embarked upon a data-consolidation project, which continues. Oracle revenue for the fiscal year ending May 31, 2016, fell 3 percent. The company attributed the decline to currency fluctuations. On a constant currency basis, revenue rose 2 percent and operating expenses rose 4 percent from its prior fiscal year due to increased sales and marketing activity and to R&D. Much of that expense was driven by a higher headcount. On the close of its fiscal year, Oracle employed approximately 136,000 full time. Roughly 38 percent of them were based in the United States.

## 12 MICROSOFT

### REDMOND, WASH.

**2015 U.S.-Booked Air Volume:** \$202 million

**2015 Global Air Volume:** \$550 million

**2015 Global T&E:** \$900 million

**Principal Air Suppliers:** Alaska, American, Delta

**Principal Hotel Suppliers:** Hyatt, Marriott, Westin

**Principal Online Booking Tool:** Concur Travel

**Principal Card Supplier:** American Express

**Principal Expense Supplier:** Microsoft Dynamics

**Consolidated Global TMC:** American Express Global Business Travel

Last year, Microsoft focused on strategic sourcing to drive travel savings. It also simplified its travel policy and introduced tools and services to increase satisfaction among travelers. To that end, the travel team forged a partnership with Amadeus to incorporate travel-booking features within its Outlook calendar application. Concur also embraced the concept this year. Microsoft employees primarily use Concur for booking in the United States and other booking tools elsewhere, including Amadeus e-Travel Management. Microsoft also has worked with its longtime TMC, American Express Global Business Travel, to integrate itinerary management features into Outlook. Microsoft also collaborated with travel tech startup Tripism on Microsoft Travel Companion, a social review and traveler support tool. Globally, the company's travel program serves 70,000 travelers.

## 13 THE WORLD BANK

### WASHINGTON, D.C.

**2015 U.S.-Booked Air Volume:** \$193 million

**2015 Global Air Volume:** \$250.6 million

**2015 Global T&E:** \$400 million

**Principal Air Suppliers:** Air France, Delta, Lufthansa, United

**Principal Hotel Suppliers:** AccorHotels, Hilton, Hyatt, InterContinental, Marriott

**Principal Online Booking Tools:** Amadeus e-Travel Management, Sabre GetThere

**Principal Card Supplier:** Diners Club MasterCard

**Principal Expense Supplier:** SAP

The World Bank is based in the United States, and 54 percent of its air volume is booked there. A full 98 percent of those U.S.-point-of-sale tickets, though, fly abroad, as the nonprofit provides loans and resources to developing countries. Most of those traveling beyond U.S. borders fly business class, averaging 14 segments per trip. The bank has 8,000 employees who travel, though the larger global workforce of 14,000, plus consultants, also contributed to 2015's \$400 million global T&E expenditure.

In 2015, the nonprofit wrapped up a TMC RFP for 67 countries, and this year, it will implement the four it selected; it will put out an RFP for another round of countries next. Also in 2015, the bank introduced a pre-trip approval process for travel that originates in the United States, and it rolled out an HRS booking portal so offices in other countries can get World Bank hotel rates and access HRS's global content. It also concluded a global airline RFP so offices in other countries can access discounted airfares. The nonprofit is conducting a global credit card search and plans to implement it by the end of the year. It also intends to enhance its global meetings program, consolidate travel reporting and, to add to its HRS feat, introduce online booking tools in some other countries. For U.S.-booked tickets, only 2 percent went through an approved online booking tool. The bank has a single travel policy globally. It uses SAP for expense reporting globally.

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# 14 EXXONMOBIL

## IRVING, TEXAS

**2015 U.S.-Booked Air Volume:** \$185.6 million

**Consolidated Global TMC:** Carlson Wagonlit Travel

Oil and gas giant ExxonMobil sharply cut administrative expenses in 2015 amid an environment of falling oil prices that resulted in steep year-over-year declines in company's revenue and profits. It reduced selling, general and administrative expenses—a category that includes business travel spending—by more than \$1 billion from 2014 to \$11.5 billion in 2015. Accordingly, *BTN* estimates that the company's U.S.-booked air volume dropped considerably in 2015. Revenue dropped to \$259.5 billion in 2015 from \$394.1 billion the previous year, and net income fell to \$16.2 billion from \$32.5 billion. The company employed 73,500 people at the end of 2015, down from 75,300 one year prior.

# 15 JOHNSON & JOHNSON

## NEW BRUNSWICK, N.J.

**2015 U.S.-Booked Air Volume:** \$182.9 million

**2015 Global Air Volume:** \$434.3 million

**2015 U.S. T&E:** \$418.3 million

**2015 Global T&E:** \$926.3 million

**Principal Air Suppliers:** American, Delta, United

**Principal Hotel Suppliers:** Hilton, Marriott, Starwood

**Principal Car Supplier:** Avis

**Principal Online Booking Tools:** Amadeus e-Travel Management, Sabre GetThere

**Principal Expense Supplier:** IBM Global Expense Reporting Solutions

**Principal Card Suppliers:** American Express, Citibank Visa

**Global Consolidated TMC:** American Express Global Business Travel

Johnson & Johnson finalized its global transient agency RFP in 2015 and moved to a hub operating model in North America and Europe. It also expanded use of hotel rate caps, for both individual travel and meetings, from 30 cities to 70. The multinational consumer goods, medical device and pharmaceutical company additionally established written thresholds for booking the lowest logical airfare.

Johnson & Johnson is migrating to Concur for global travel and expense this year. By the end of 2016, it will have implemented Concur Expense in as many as 42 markets, and plans 10 more for 2017. By year-end, it will implement Concur Travel in 19 markets and plans 12 more for 2017. In 2015, the firm primarily booked travel with Sabre GetThere in North America, Latin America and Asia/Pacific and with Amadeus in Europe, the Middle East and Africa. In 2016, the company also is increasing its advanced air booking requirement from 14 days to 21, and it will work on compliance to booking the lowest logical airfare.

Of its 127,000 employees in more than 60 countries, 54,607 travel for business. Johnson & Johnson uses American Express corporate cards in about 65 percent of its markets and Citibank Visa for the remaining 35 percent, mostly representing EMEA. The company expects to decrease U.S.-booked air spend to \$160.5 million this year, owing to an enhanced focus on compliance and to company directives to reduce spend.

# 16 BANK OF AMERICA

## CHARLOTTE, N.C.

**2015 U.S.-Booked Air Volume:** \$180 million

**Consolidated U.S. TMC:** American Express Global Business Travel

Amid declining revenue and a decrease in headcount, Bank of America's U.S.-booked air volume dipped slightly in 2015, according to a *BTN* estimate. Revenue declined to \$83.4 billion from \$85.1 billion one year earlier. The bank's net income rose from from \$4.8 billion to \$15.9 billion, but that primarily reflects a decline in litigation expenditure. Other general expenses declined in 2015, as well. Bank of America had 213,000 full-time-equivalent employees at the end of 2015, down from 224,000 at the end of 2014. The bank significantly increased the number of videoconferencing calls to nearly 123,800 last year, up from about 97,800 in 2014. The 2015 figure is nearly 10 times the total of 2010.

# 17 KPMG

## NEW YORK CITY

**2015 U.S.-Booked Air Volume:** \$167 million

**2015 Global Air Volume:** \$220 million

**2015 U.S. T&E:** \$332 million

**2015 Global T&E:** \$448 million

**Principal Air Suppliers:** American, Delta, Southwest

**Principal Hotel Suppliers:** Hilton, Marriott, Starwood

**Principal Car Rental Suppliers:** Avis, Hertz

**Principal Online Booking Tool:** Sabre GetThere

**Principal Card Supplier:** BMO MasterCard Diners Club

**Principal Expense Supplier:** SAP

**Consolidated U.S. TMC:** American Express Global Business Travel

KPMG consolidated its air alliance contracts, in an effort that began at the end of 2014 and continued in the beginning of 2015. In 2016, the firm will continue to push travelers to use self-service mobile technology for travel bookings and updates, including new tools and proprietary technology. KPMG's global revenue increased 8.1 percent in 2015 to \$24.4 billion, and that rise is expected to continue through 2016. This global growth also raised the number of travelers at the company from 20,000 to 26,000. U.S.-booked air volume increased 4 percent in 2015 to \$167 million. KPMG expects U.S.-booked air volume to reach \$175 million in 2016 and to stay flat in 2017.

# 18 WELLS FARGO

## SAN FRANCISCO

**2015 U.S.-Booked Air Volume:** \$159 million

**Principal Air Suppliers:** American, Delta, United

**Principal Hotel Suppliers:** Hilton, Marriott, Starwood

**Principal Car Rental Suppliers:** Enterprise, National, Hertz

**Principal Online Booking Tool:** Concur Travel

**Principal Expense Supplier:** Concur Expense

**Consolidated Global TMC:** HRG

Wells Fargo cut its U.S.-booked air volume by more than 20 percent in 2015 by reducing travel companywide. The company

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based Wi-Fi systems on most of their narrowbody mainline fleet.

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In addition to offering a wide range of award winning wines, American has new premium spirits inflight including Woodford Reserve Kentucky Straight Bourbon and Glenlivet 15 on select Premium cabins. Finally, American has also partnered with four modern brands to develop a brand-new set of amenity kits—Cole Haan, 3LAB, C.O. Bigelow, and Clark's Botanicals—allowing travelers to arrive feeling refreshed and ready to take on the day.

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implemented pre-trip compliance processes, including changes to policy. Wells Fargo now requires pre-trip approval across all business units for long-haul international travel, as well as pre-trip authorization for noncompliant air and hotel bookings. The company pegs policy compliance for air at 93 percent and compliance for hotel at 92 percent.

Wells Fargo continues to focus on travel cost containment. That said, it projects T&E will inch upward this year and estimates that 2016 full-year U.S.-booked air volume will rise 7 percent. The company reported less favorable contracts with air partners, which could, in part, be the result of lower negotiating volumes.

## 19 CITI

### NEW YORK CITY

**2015 U.S.-Booked Air Volume:** \$158 million

**Consolidated U.S. TMC:** Carlson Wagonlit Travel

Citi's revenue declined slightly in 2015 while operating income increased. *BTN* estimates the firm's 2015 U.S.-booked air volume at \$158 million. Citi recorded 109,700 metric tons of carbon dioxide-equivalent emissions related to its air travel last year, down 39 percent from 2014. The 2015 figure also is its lowest since 2010. The company also reported that rail travel generated 1,605 metric tons of CO<sub>2</sub>e, a decline of more than 75 percent from 2014 and the lowest figure since Citi began reporting the figure in 2013.

In 2015, Citi began an initiative to measure its suppliers in travel and other categories by progress on sustainability and social performance goals. The company plans to have policies and training structures related to the initiative in place by 2018. Corporate revenue declined 3 percent in 2015 to \$46.6 billion. Net income increased from \$7.3 billion in 2014 to \$17.2 billion. The company employed 231,000 people at the end of 2015, down 10,000 from the end of 2014.

## 20 JPMORGAN CHASE

### NEW YORK CITY

**2015 U.S.-Booked Air Volume:** \$153 million

**2015 Global Air Volume:** \$307 million

**2015 U.S. T&E:** \$350 million

**2015 Global T&E:** \$610 million

**Principal Air Suppliers:** American, Delta, United

**Principal Hotel Suppliers:** Hilton, Marriott, Starwood

**Principal Car Rental Suppliers:** Avis, Enterprise, Hertz, National

**Principal Online Booking Tool:** Sabre GetThere

**Principal Card Supplier:** JPMorgan Chase

**Principal Expense Supplier:** Concur Expense

**Consolidated Global TMC:** Carlson Wagonlit Travel

In 2015, JPMorgan Chase implemented a pre-trip approval process that requires travelers to get approval for trips that surpass a certain dollar amount. Travelers also are required to get approval for out-of-policy hotels. U.S.-booked air volume decreased by 20 percent in 2015. However, the bank anticipates air volume to increase 3 percent in 2016. This year, it will continue to focus on managing expenses. JPMorgan employs more than 230,000 employees and in 2015 earned \$24.4 billion in net income from \$96.6 billion of revenue.

## 21 ROCHE

### BASEL, SWITZERLAND

**2015 U.S.-Booked Air Volume:** \$150 million

**2015 Global Air Volume:** \$308 million

**Principal Air Suppliers:** American, British, Delta, Lufthansa, Swiss, United

**Principal Hotel Suppliers:** Carlson Rezidor, Hilton, InterContinental, Marriott, Starwood

**Principal Car Rental Suppliers:** Avis, Hertz, National

**Principal Online Booking Tool:** Sabre GetThere

**Principal Card Supplier:** Citi

**Principal Expense Supplier:** Concur Expense

**Consolidated U.S. TMC:** BCD Travel

Pharmaceutical, medical and healthcare company Roche is on track to maintain its U.S.-booked air volume this year. Beginning in 2014, the company's travel program established a global travel council to better align internally. Roche also has been consolidating airline and hotel programs worldwide since 2009. It also moved last year to consolidate offsite meetings spend within the United States. This year, Roche has an eye toward enhancing data transparency, traveler engagement and global travel technology platforms.

It has consolidated TMC services in the United States with BCD Travel, and the primary TMC used outside the United States is HRG. Roche's travel policy, applied across the globe, remained relatively constant last year, though the company is increasingly preferring airfare-buying decisions based on low-fare availability rather than by preferred vendor. Roche uses Concur and another internal SAP expense solution for expense reporting inside and outside the United States. Last year, it achieved a 66 percent online booking rate using Sabre's GetThere in the United States. Roche also uses GetThere in Latin America and Singapore. Globally, travelers use multiple booking systems.

## 22 THE WALT DISNEY CO.

### BURBANK, CALIF.

**2015 U.S.-Booked Air Volume:** \$142 million

**Principal Card Supplier:** Citi Visa

**Consolidated U.S. TMC:** HRG

In 2015, The Walt Disney Co.'s U.S.-booked air volume rose \$6 million, and this year, the company expects it to jump another \$4 million to \$146 million. The company recorded \$52.5 billion in revenue in 2015. In 2016, it aims to keep increasing online booking adoption globally.

## 23 GOOGLE

### MOUNTAIN VIEW, CALIF.

**2015 U.S.-Booked Air Volume:** \$140 million

**2015 Global Air Volume:** \$245 million

**2015 U.S. T&E:** \$380 million

**2015 Global T&E:** \$549 million

**Principal Air Suppliers:** British, Delta, United

**Principal Online Booking Tool:** Concur Travel



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**Principal Card Supplier:** Citi Visa

**Principal Expense Supplier:** Concur Expense

**Consolidated Global TMC:** Carlson Wagonlit Travel

Google increased its U.S.-booked air volume by \$24 million in 2015. Half the air tickets sold in the United States were for international travel. The company anticipates its U.S.-booked air volume will grow by \$30 million in 2016. The company operates with a single global travel policy. Last year, it altered its policy to increase fare caps on routes longer than 14 hours, enabling employees to fly business class on such flights. The travel program services 45,000 employees. Google's travel program allows open bookings. Twenty percent of bookings went through approved online tools last year, and just 18 percent required agent assistance. The company uses an individual bill, individual pay model.

## 24 IPG

### NEW YORK CITY

**2015 U.S.-Booked Air Volume:** \$133 million

**Consolidated U.S. TMC:** American Express Global Business Travel

IPG's revenue remained mostly static in 2015 at \$7.6 billion. On Dec. 31, 2015, the company reported 49,200 employees, of which 19,900 are based in the United States. Growth was driven by increased work with existing clients and new business, with significant contributions from China, India, Singapore and the United Kingdom, according to its 2015 annual report. U.S.-booked air volume increased 60 percent in 2015, when, the advertising holding company acquired majority stakes in four companies—Media Experts in Canada and the Russian affiliates of McCann, MullenLowe and FCB—and acquired the United Kingdom's Hugo & Cat outright.

## 25 HEWLETT PACKARD ENTERPRISE

### PALO ALTO, CALIF.

**2015 U.S.-Booked Air Volume:** \$131 million

**2015 Global Air Volume:** \$284 million

**Principal Air Suppliers:** American, United

**Principal Hotel Suppliers:** Hilton, Marriott

**Principal Car Rental Supplier:** Avis

**Principal Online Booking Tool:** Concur Travel

**Principal Card Supplier:** American Express

**Principal Expense Supplier:** Proprietary Tool

**Consolidated Global TMC:** Carlson Wagonlit Travel

In 2015, Hewlett-Packard split into Hewlett Packard Enterprise and HP Inc. HPE, which retained the technology solutions segment of Hewlett-Packard's business, has a standalone travel program. In May, HPE announced a planned spinoff of its Enterprise Services business with CSC to create an IT services firm. The spinoff is expected to be complete by March 2017.

In 2015, HPE placed equal focus on each traveler experience and cost savings. It optimized its global travel program with technology and data analytics. To support the company's transformation, HPE altered wording from passive to suggestive and from prescriptive to assertive. It also enacted requirements for cost-effective travel behavior and T&E savings. This year, HPE is rewriting its global

meetings and events policy to shape traveler behavior and compliance and to capture greater ROI.

HPE uses Carlson Wagonlit Travel as its global TMC. It uses Concur Travel and Sabre GetThere for online booking, and 81 percent of its air bought in the United States went through approved online tools. HPE's 90,000 travelers use the company's proprietary expense reporting system. The company's 2016 U.S.-booked air volume is expected to decrease to \$101 million.

## 26 CISCO

### SAN JOSE, CALIF.

**2015 U.S.-Booked Air Volume:** \$130 million

**Consolidated U.S. TMC:** American Express Global Business Travel

Networking technology giant Cisco Systems increased its 2015 U.S.-booked air volume from 2014, according to a *BTN* estimate.

Cisco has developed multiyear deals with multibrand hotel companies that contain neither marketshare targets nor room-night commitments, promising instead only revenue in exchange for lower room rate. The initiative not only generated 25 percent savings off the company's previous negotiated rates in its first 18 months but also helped increase hotel program compliance to more than 80 percent of bookings. Cisco added a prompt to its online booking tool that prevents bookings of nonpreferred properties without the approval of a senior manager. Cisco will explore bringing this negotiating strategy to its deals with airlines and car rental firms.

In February 2013, the company announced a goal of reducing, by the end of its 2017 fiscal year, the greenhouse gases emitted by its business travel by 40 percent from 2007 fiscal year levels. In its 2014 fiscal year—which ended July 26, 2014, marking the most recent available data—Cisco's global business travel resulted in 157,900 metric tons of carbon dioxide-equivalent emissions. That figure is about 21 percent lower than fiscal 2007 levels but is about 13 percent higher than fiscal 2013 emissions. The pace of Cisco's acquisitions and global business expansion has required increased air travel.

Key to Cisco's strategy of air travel reduction are its own remote conferencing tools, including TelePresence and WebEx. The company uses the tools extensively for internal meetings, including executive operational reviews and departmental meetings and one-third of its annual global ISO 14001 site audits.

Revenue for Cisco's 2016 fiscal year, which ended July 30, increased about one-fifth of a percentage point to \$49.2 billion, on the heels of a 4 percent increase the fiscal year prior. Net income in the 2016 fiscal year increased 20 percent; in fiscal 2015, it increased 14 percent. Cisco had 73,700 employees on July 30, 2016, about 1,800 more than one year prior.

## 27 SIEMENS

### MUNICH

**2015 U.S.-Booked Air Volume:** \$125 million

**Consolidated U.S. TMC:** BCD Travel

*BTN* estimates that Siemens spent \$125 million on airline tickets at the U.S. point of sale in 2015, down from \$146

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million in 2014. Regionalization efforts to align travel processes, policies, providers and tools in the Americas continue. After consolidating aspects of its travel management program in North America, Siemens' focus has broadened across the Americas with initiatives to consolidate strategy, tools, travel providers, policies and reporting. Last year, the company expanded its meetings management program, introducing a new global meetings technology platform. This year, the company intends to centralize meetings data and make it more robust by integrating Siemens' Cvent-powered mobile app with its partner CRM company. The company also is working to optimize use of the app's polling, communications and gamification features.

A major focus of Siemens' travel management program in 2015 was completing an endeavor begun the year before called Shake It Up, which included a comprehensive review and update of all processes, reporting and communications to ensure relevance, ease and transparency to travelers, stakeholders and management. Seeking to balance service and savings, Shake It Up has resulted in changes to traveler engagement, communications and education via new tools, policies and internal social media engagement. It has refreshed traveler scorecards and standardized internal business review formats for a consistent approach with management of Siemens' diverse businesses.

Siemens achieved 95 percent online booking rates after the company reengineered its airline ticket-exchange program two years ago. That nearly eliminated ticket spoilage, bolstered savings and reduced agent touches. In addition, the company last year put processes in place to support the selection of the company's preferred hotels and to ensure that the hotels are honoring the contracted rates.

The company's two largest travel markets are its home base in Germany and the United States. Internationally, the company contracts with airline joint ventures, including Air France/KLM/Delta and Star Alliance airlines. Even so, the company, especially outside the United States, has made use of airfare spot buying by way of a lowest-logical airfare policy, especially on short- and medium-haul travel. Siemens' growth in emerging markets has prompted new airline relationships, including Emirates, Turkish Airlines and Air China.

## 28 COMCAST

### PHILADELPHIA

**2015 U.S.-Booked Air Volume:** \$116 million

**Consolidated U.S. TMC:** BCD Travel

*BTN* estimates that media and entertainment conglomerate Comcast, owner of NBC Universal, increased its U.S.-booked air volume in 2015. Comcast revenue increased more than 8 percent to \$74.5 billion, while operating income increased more than 7 percent to just shy of \$16 billion. Operating and administrative expenditures increased 7.5 percent to \$21.3 billion. While Comcast dropped a bid to acquire Time Warner Cable in 2015, the company purchased DreamWorks Animation this year for \$3.8 billion.

## 29 RAYTHEON

### WALTHAM, MASS.

**2015 U.S.-Booked Air Volume:** \$113.1 million

**Consolidated U.S. TMC:** BCD Travel

**Consolidated Global TMC:** BCD Travel

In 2015, defense, government and cybersecurity technology company Raytheon brought U.S.-booked air volume down by \$6.8 million from 2014's \$119.9 million. It expects to keep spending at that level this year. Forty percent of the airfare purchased in the United States is for travel to other countries. Raytheon, which has a single travel policy that applies globally, also refined its duty-of-care program last year.

## 30 BCG

### BOSTON

**2015 U.S.-Booked Air Volume:** \$113 million

**Consolidated U.S. TMC:** American Express Global Business Travel

Privately held management consulting firm BCG claimed \$5 billion in 2015 revenue, up from \$4.55 billion the year before, and *BTN* estimates its U.S.-booked air volume increased last year, as well. BCG designed and made available to some employees an iOS-based itinerary management app, based on Amadeus' mobile platform. Branded myBCGtrip, the app enables access to trip details, flight notifications and check-in, along with the ability to connect with its preferred agency, American Express Global Business Travel, and rebook canceled flights. BCG had more than 12,000 employees last year, up from 10,500 in 2014, and has offices in 48 countries.

## 31 AMAZON

### SEATTLE

**2015 U.S.-Booked Air Volume:** \$110 million

**Consolidated Global TMC:** Carlson Wagonlit Travel

Online retailer Amazon increased its U.S.-booked air volume 15.8 percent to \$110 million in 2015, according to *BTN*'s estimate. This follows an increase of 35 percent the prior year. Growth in the size of the travel program has coincided with rapid company growth. In 2015, Amazon topped \$100 billion in sales for the first time, the fastest pace for any company to reach that milestone. That marks 20 percent growth year over year. The company reports more than 230,000 employees, more than seven times the number it had in 2010.

## 32 MEDTRONIC

### DUBLIN

**2015 U.S.-Booked Air Volume:** \$109 million

**2015 Global Air Volume:** \$155.4 million

**2015 U.S. T&E:** \$331.3 million

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**2015 Global T&E:** \$466.6 million

**Principal Air Suppliers:** American, Delta, United

**Principal Hotel Suppliers:** Hilton, Marriott, Starwood

**Principal Car Rental Suppliers:** Avis, Enterprise, National

**Principal Online Booking Tool:** Sabre GetThere

**Principal Card Supplier:** American Express

**Principal Expense Supplier:** adSOFT Expense Express

Last year, Medtronic's U.S.-booked air volume rose from \$94.6 million. The medical technology firm and device manufacturer is poised for another increase this year. In early 2015, it closed its acquisition of Covidien and shifted its headquarters to Dublin. Last year, the company's travel team worked to consolidate Covidien's program and has used its larger size as leverage for improved deals with travel suppliers. The company rolled out a new global travel policy last year, which included tighter business class-usage guidelines. This year, Medtronic plans further program consolidation. Medtronic uses Sabre GetThere for online booking in the United States and Amadeus systems for booking outside the United States. American Express Global Business Travel is Medtronic's primary global TMC.

## 33 FEDEX

### MEMPHIS, TENN.

**2015 U.S.-Booked Air Volume:** \$108 million

**Consolidated U.S. TMC:** BCD Travel

BTN estimates FedEx increased its U.S.-booked air volume in 2015. For FedEx's 2016 fiscal year, which ended May 31, revenue totaled \$50.3 billion, up 6 percent from the \$47.5 billion recorded in its 2015 fiscal year. That figure was up about 4 percent over 2014. Consolidated net income for fiscal year 2016 increased to \$1.8 billion from \$1.05 billion the year prior. For the 12 months ending May 31, 2015, FedEx recorded about 51,000 metric tons of carbon dioxide-equivalent emissions related to its employees' commercial travel, outside its own delivery fleet of airplanes. That figure is about 11 percent higher than it was in the company's 2014 fiscal year. FedEx was a customer of U.S. regional transportation network OneJet in 2015.

In 2016, FedEx finalized an acquisition of European competitor TNT Express for about €4.4 billion. FedEx had about 323,000 employees worldwide, including part-time employees, in fiscal year 2015.

## 34 NORTHROP GRUMMAN

### FALLS CHURCH, VA.

**2015 U.S.-Booked Air Volume:** \$106.8 million

**2015 Global Air Volume:** \$110.2 million

**2015 U.S. T&E:** \$264 million

**2015 Global T&E:** \$270 million

**Principal Air Suppliers:** American, Delta, United

**Principal Hotel Suppliers:** Hilton, InterContinental, Marriott

**Principal Car Rental Suppliers:** Avis, Budget

**Principal Online Booking Tool:** Concur Travel

**Principal Expense Supplier:** Concur Expense

**Principal Card Supplier:** JPMorgan Chase Visa

**Consolidated Global TMC:** BCD Travel

Northrop Grumman's U.S.-booked air volume declined slightly in 2015. The defense contractor and global security company expects to hold volume steady this year. While most of its business is in the United States, it continues to expand internationally. It now operates in 25 nations and has a network of offices and local businesses in Europe, the Middle East and Asia/Pacific.

In 2014, Northrop Grumman began expanding its managed travel program internationally and continued those efforts through 2015. Last year, the company's global travel program expanded to the United Kingdom and Australia. This year, it continues to expand the program's reach.

Northrop Grumman is exploring tightening corporate credit card controls to mitigate risk. A single travel policy covers more than 80 percent of the organization's travel spending, though there is some regional variance.

In the United States, 91 percent of Northrop Grumman's air tickets were reserved online. The company uses Concur Travel within and outside the United States. Concur Expense is the primary system U.S. travelers use to file expenses reports, though Microsoft Dynamics is used outside the United States.

## 35 NOVARTIS

### BASEL, SWITZERLAND

**2015 U.S.-Booked Air Volume:** \$106.7 million

**Principal Air Suppliers:** American, Delta, United

**Principal Hotel Suppliers:** Hilton, Marriott, Starwood

**Principal Car Rental Suppliers:** Enterprise, Hertz

**Principal Online Booking Tool:** Sabre GetThere

**Principal Card Supplier:** JPMorgan Chase MasterCard

**Principal Expense Supplier:** Concur Expense

**Consolidated Global TMC:** HRG

Novartis' U.S.-booked air volume rose in 2015 from 2014's \$104.8 million. A major restructuring in 2014 included both divestitures and acquisitions, prompting a reorganization of the company's travel operations. The Swiss pharmaceutical company delayed several travel services RFPs but resumed those efforts last year. It awarded Carlson Wagonlit Travel its travel management services, replacing HRG. For 2016, Novartis is undergoing airline and ground transportation RFPs and will continue to streamline travel operations. Novartis also issued a new global travel policy July 1 that creates parity among divisions and is anticipated to yield significant savings.

## 36 UNITED TECHNOLOGIES

### FARMINGTON, CONN.

**2015 U.S.-Booked Air Volume:** \$104 million

**2015 U.S. T&E:** \$259 million

**Principal Air Suppliers:** American, Delta, United

**Principal Hotel Suppliers:** Hilton, InterContinental, Marriott

**Principal Car Rental Supplier:** Avis

**Principal Online Booking Tool:** Concur Travel

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**Principal Card Supplier:** Citi Visa

**Principal Expense Supplier:** SAP

**Consolidated Global TMC:** American Express Global Business Travel

United Technologies renegotiated its airline and travel agency contracts in 2015 and reported more favorable agreements in both categories. The company found hotel contracts to be more intractable and ended with less favorable agreements for last year. The net result was positive for the corporation, though, which achieved \$9 million in travel savings in 2015.

Last year the company expected U.S.-booked air volume to land at about \$112 million for 2015. Instead, it alighted at \$104 million, a decrease of almost 9 percent. The company changed its policy in 2015 to restrict business-class fares to flights of 12 hours or more. In 2016, UTC will embark on a car rental RFP, and it will make a major play for travel data. The company will review dynamic data dashboards to look deeper into travel intelligence and support strategy. The company uses two online booking tools, Concur in the United States and Amadeus e-Travel Management in markets outside the United States.

## 37 ABBOTT

**ABBOTT PARK, ILL.**

**2015 U.S.-Booked Air Volume:** \$102 million

**Principal Online Booking Tool:** Concur Travel

**Principal Expense Supplier:** Concur Expense

**Consolidated U.S. TMC:** American Express Global Business Travel

*BTN* estimates that global pharmaceutical and healthcare giant Abbott significantly increased its U.S.-booked air spend in 2015 to \$102 million, after restricting its air spend in 2014 to \$65 million during a broad cost-reduction effort and restructuring. The company uses Concur for online booking in the United States, as well as many countries in Europe and Asia/Pacific. Abbott directs U.S. travelers to use the tool to book all domestic flights, as well as those to Canada and Puerto Rico. Abbott also instructs U.S. travelers to book nonstop round-trip flights to Europe online using Concur.

Abbott increased total sales to \$20.4 billion last year from \$20.3 billion in 2014. The company's selling, general and administrative expenses, a line item that includes business travel expenditures, increased to \$6.8 billion from \$6.5 billion the prior year. In 2015, Abbott completed the \$3.4 billion acquisition of Chilean firm CFR Pharmaceuticals and fully acquired control of Veropharm, a Russian pharmaceutical company, for \$315 million.

## 38 GENERAL MOTORS

**DETROIT**

**2015 U.S.-Booked Air Volume:** \$101 million

**Consolidated U.S. TMC:** American Express Global Business Travel

U.S.-booked air volume increased slightly year over year in 2015 for General Motors. The company has begun reporting greenhouse gas emissions generated by its business travel. For 2013, the most recent data available, it reported 60,200 metric tons of carbon dioxide-equivalent emissions. Revenue increased 2 percent in 2015 to \$155.9 billion, while adjusted earnings before interest and income taxes declined to \$6.5 billion from \$10.8 billion. GM had 216,000 employees at the end of 2015, a year-over-year increase of 1,000.

## 39 MERCK

**KENILWORTH, N.J.**

**2015 U.S.-Booked Air Volume:** \$100 million

**Principal Card Supplier:** American Express

**Consolidated U.S. TMC:** American Express Global Business Travel

Merck's revenue dipped 6.5 percent in 2015 to about \$39.5 billion, but *BTN* estimates the pharmaceutical firm's 2015 U.S.-booked air volume increased from 2014. For 2015, Merck reported 144,400 metric tons of carbon dioxide-equivalent emissions related to business travel—including air and rail travel, car rentals and hotel stays—up about 20 percent year over year. The company finalized a reorganization of its TMC services this year. American Express Global Business Travel now provides service in the Americas and Europe, while BCD Travel handles the Asia/Pacific region. Previously, Amex provided service in North America and Asia/Pacific, while BCD handled parts of Europe and Latin America.

Merck works with Amex GBT for strategic meetings management services and American Express for corporate card services. The company encourages the use of remote conferencing tools as an alternative to traveling for business or meetings. Merck also offers within its online booking tool an option to book rail travel as a means of reducing the company's carbon footprint. The firm had 68,000 employees at the end of 2015, down from 70,000 one year earlier.

## 39 PEPSICO

**PURCHASE, N.Y.**

**2015 U.S.-Booked Air Volume:** \$100 million

**Consolidated U.S. TMC:** American Express Global Business Travel

*BTN* estimates U.S.-booked air volume PepsiCo held steady in 2015 as revenue dipped 5 percent to \$63.1 billion. In recent years, PepsiCo consolidated travel management services in 20 countries in the Middle East and the Asia/Pacific region. It streamlined its travel policies, its hotel program and its payment process; created a regional service center and new implant locations; and advanced booking technology, enabling consolidated management reporting. The company had 263,000 employees at the end of 2015, 8,000 fewer than a year prior.

## 39 SAP

**WALLDORF, GERMANY**

**2015 U.S.-Booked Air Volume:** \$100 million


**Consolidated U.S. TMC:** BCD Travel

A companywide effort to reduce SAP's business travel bore fruit in 2015, according to a *BTN* estimate, with U.S.-booked air volume dropping in 2015 even amid acquisitions and an increase in the business management technology firm's revenue. Among SAP's recent acquisitions is travel booking and expense management provider Concur Technologies; that deal closed in December 2014.

SAP plans to reduce its greenhouse gas emissions to 2000 levels by 2020. The company has targeted business travel as a key driver for this goal and reduced the amount of carbon dioxide generated by travel from 281 kilotons in 2014 to 237 kilotons in 2015. In the second half of 2015, SAP began to offset some business air travel in the United States, result-

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EVA upped its airport services to make it easier for passengers to navigate crowds and board on time. It added easy-to-read electronic maps at check-in counters to show travelers their location in relation to VIP lounges and departure gates. During busy times, it positions staff along concourses to direct passengers to gates.

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ing in a compensation of 35 kilotons of carbon dioxide. SAP has made available to all employees a sustainability dashboard originally developed for senior leadership that shows how department-level business travel contributes to the overall carbon footprint. The company also continues to invest in virtual conferencing technology as a means to reduce travel, including the development of more than 100 collaboration rooms and the installation of 360-degree cameras in more than 1,200 meeting spaces.

Revenue increased 18 percent in 2015 to €20.8 billion. The company employed just shy of 77,000 people at the end of 2015, up 3 percent.

## 42 NIKE

### BEAVERTON, ORE.

**2015 U.S.-Booked Air Volume:** \$95 million

**2015 Global Air Volume:** \$145 million

**Principal Air Suppliers:** Alaska, American, Delta

**Principal Hotel Suppliers:** Hyatt, Marriott, Starwood

**Principal Car Rental Supplier:** Hertz

**Principal Card Supplier:** American Express

**Principal Online Booking Tool:** Sabre GetThere

**Principal Global Expense Supplier:** Infor

**Consolidated U.S. TMC:** ATG

*BTN* estimates that sports and fitness retailer Nike slightly increased its U.S.-booked air volume in 2015 from \$92.8 million in 2014, while its global air volume rose from \$139.4 million. Nike revised its T&E policy in 2014 but made no policy changes in 2015. The goal for 2015 was to extend apps to make business travel easier and more friendly for its more than 66,000 travelers. In 2015, it launched Concur Travel as its online booking tool. It also consolidated its approach to airline suppliers. In 2016, it aims to ramp up its adoption of the Concur Travel booking tool. It will reflect that emphasis by incorporating it into policy as the primary booking channel.

Nike's U.S.-booked air volume breaks down as 30 percent domestic and 70 percent international. While Nike does not have a single global travel policy, it does have a single policy in place for more than 80 percent of its travel spending. Nike's domestic travel is consolidated with TMC ATG and outside the United States it is served by travel agencies in ATG's partner network. The company uses an individual bill, central pay program. In its fiscal year 2015, Nike's revenue grew 10 percent to \$30.6 billion.

## 42 PFIZER INC.

### NEWYORK CITY

**2015 U.S.-Booked Air Volume:** \$95 million

**2015 Global Air Volume:** \$211 million

**2015 U.S. T&E:** \$410 million

**2015 Global T&E:** \$912 million

**Principal Air Suppliers:** American, British, Delta, United

**Principal Hotel Suppliers:** Hilton, Hyatt, Marriott

**Principal Car Rental Suppliers:** Avis, Budget

**Principal Online Booking Tool:** Concur Travel

**Principal Card Supplier:** American Express

**Consolidated Global TMC:** BCD Travel

Last year, Pfizer focused on growing its online booking adoption and reached 78 percent of air transactions reserved online in the United

States. That's up 7 percentage points from the prior year. Since 2014, the pharmaceutical company has used Concur Travel as its booking system worldwide. This year, the company is delving into travel metrics and data to drive better spending behaviors and enhance compliance to policy and preferred vendors. The company did not make any major policy tweaks in 2015 and doesn't expect any for 2016.

## 44 ALLERGAN

### DUBLIN

**2015 U.S.-Booked Air Volume:** \$90 million

**Principal Air Suppliers:** American, Delta, United

**Principal Online Booking Tool:** Concur Travel

**Principal Expense Supplier:** Concur Expense

**Consolidated U.S. TMC:** BCD Travel

Previously known as Actavis, global specialty pharmaceutical company Allergan enters the Corporate Travel 100 for the first time this year with a *BTN* estimate of \$90 million in U.S.-booked air volume, following a year of massive growth. Net revenue more than doubled from \$6.7 billion in 2014 to more than \$15 billion in 2015, and the net contribution from the U.S. brands segment also more than doubled from \$4.5 billion in 2014 to \$9.1 billion in 2015. Selling and marketing expenses, which includes travel costs, more than doubled from \$1.2 billion in 2014 to \$2.9 billion in 2015.

The massive growth was the result of six acquisitions that prompted repeated supplier contract renegotiations. Subsequent transactions in 2016 reduced its size, but following an aborted effort to merge with Pfizer, the company continues to make acquisitions. In North America, Allergan has a high level of adoption for its Concur online booking and expense tool and uses a meetings tool and internal and third-party planners to manage its substantial meetings expenses.

The company, which operated in more than 100 countries in 2015, began its surge with the Allergan acquisition, which closed on March 17, 2015. The addition of the legacy Allergan's therapeutic franchises in ophthalmology, neurosciences and medical aesthetics/dermatology/plastic surgery complemented the company's existing central nervous system, gastroenterology, women's health and urology franchises. The combined company benefited from legacy Allergan's global brand equity and consumer awareness of key products, including Botox and Restasis. The transaction also expanded its presence and product reach across international markets, with strengthened commercial positions across Canada, China, Europe, India, the Middle East, Latin America and Southeast Asia. Other acquisitions last year included Auden Mckenzie, Oculeve, Kythera, Northwood Medical Innovation and AqueSys. As of Dec. 31, 2015, Allergan had 31,200 employees. Approximately 14,900 of them transferred to Teva in August 2016 when Teva acquired the company's global generic pharmaceuticals business and other assets.

## 44 GOLDMAN SACHS

### NEWYORK CITY

**2015 U.S.-Booked Air Volume:** \$90 million

**2015 Global Air Volume:** \$200 million

**2015 U.S. T&E:** \$260 million

**2015 Global T&E:** \$500 million



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**Principal Car Rental Suppliers:** Avis, Hertz, National

**Principal Online Booking Tool:** Sabre GetThere

**Principal Card Supplier:** American Express

**Principal Expense Supplier:** Proprietary tool

**Consolidated Global TMC:** American Express Global Business Travel

The finance company's U.S.-booked air volume showed no noticeable change in 2015, following a year of flat spending. Just under half of air bookings made in the United States headed abroad. Almost all, 96 percent, went through approved booking channels. In 2015, the company worked on business continuity planning and crisis management resilience, as well as management information capabilities. It also optimized contract usage through point-of-sale initiatives and back-office automation. The company also implemented offsets to support its pledge to be carbon neutral from 2015 onward. Goldman uses an individual bill, central pay card program. Net revenue was \$33.8 billion in 2015, down from \$34.5 billion in 2014. As of December 2015, Goldman had 36,800 staffers, up from 34,000 in 2014.

## 46 GENERAL DYNAMICS

**FALLS CHURCH, VA.**

**2015 U.S.-Booked Air Volume:** \$89 million

**Principal Online Booking Tool:** Concur Travel

**Principal Expense Supplier:** Concur Expense

Global aerospace and defense company General Dynamics reduced its U.S.-booked air volume by \$8 million in 2015. It expects to increase its volume slightly in 2016. Last year, General Dynamics improved compliance to preferred suppliers through traveler incentives and updates to its travel policy. It shifted policy to focus more on traveler convenience and streamlined processes. The company works with BCD Travel as an agency partner globally, though not on a consolidated basis. General Dynamics' 25,000 business travelers book online through Concur Travel and file expenses through Concur Expense. Eighty percent of the company's 2015 U.S.-booked air tickets were for domestic travel.

## 47 TPG

**FORT WORTH, TEXAS**

**2015 U.S.-Booked Air Volume:** \$85 million

**Principal Air Suppliers:** American, Delta

**Principal Hotel Suppliers:** Hilton, Hyatt, Marriott

**Principal Car Rental Supplier:** Avis

**Principal Online Booking Tool:** Concur Travel

**Principal Card Supplier:** American Express

**Principal Expense Supplier:** Concur Expense

**Consolidated U.S. TMC:** Carlson Wagonlit Travel

TPG, the global private equity investment firm, increased the U.S.-booked air volume of its portfolio of holdings in 2015 from 2014's \$82 million. The travel program achieved substantial negotiated savings and drove compliance with preferred hotel companies and airlines. The company spends 70 percent of its travel budget within the United States. It does not have one global travel policy but instead allows each region to create its own policies. While the company has not consolidated TMC

services globally, it has consolidated U.S. TMC services under Carlson Wagonlit Travel, which also is its primary TMC service provider outside the United States.

TPG uses American Express as its primary corporate card supplier in the United States, where it operates on an individual bill, central pay basis. The company uses Concur as its primary provider of booking and expense services worldwide. Its travelers book 40 percent of air tickets online, and 95 percent of those bookings are made without agent assistance.

## 48 ROYAL DUTCH SHELL

**THE HAGUE, THE NETHERLANDS**

**2015 U.S.-Booked Air Volume:** \$84 million

**Consolidated U.S. TMC:** Carlson Wagonlit Travel

BTN estimates a significant drop in Royal Dutch Shell's U.S.-booked air volume in 2015, as lower oil prices led to sharply reduced revenue for the oil and gas giant, which looked to cut costs throughout the year. Shell's business air travel generated 310,000 metric tons of carbon dioxide equivalent in 2015, down 28 percent from 2014. Shell developed a business intelligence platform that analyzes travelers' booking behavior in recent years, and it uses the data it generates to persuade travelers and managers to book through designated channels. The company's revenue dropped from \$421.1 billion in 2014 to \$265 billion in 2015. Income dropped from \$14.9 billion to \$1.9 billion. Shell employed 90,000 at the end of 2015, down from 94,000 at the end of 2014. In 2016, it completed the \$70 billion acquisition of British multinational oil and gas company BG Group.

## 49 CHEVRON

**SAN RAMON, CALIF.**

**2015 U.S.-Booked Air Volume:** \$82.3 million

**2015 Global Air Volume:** \$188.3 million

**2015 U.S. T&E:** \$166.7 million

**2015 Global T&E:** \$277.5 million

**Principal Air Suppliers:** Delta, KLM, United

**Principal Hotel Suppliers:** Hilton, Hyatt, Marriott

**Principal Car Rental Suppliers:** Avis, Budget

**Principal Online Booking Tool:** Concur Travel

**Principal Card Supplier:** American Express

**Principal Expense Supplier:** Concur Expense

**Consolidated U.S. TMC:** Carlson Wagonlit Travel

Chevron reduced its U.S.-booked air volume 35.2 percent to \$82.3 million in 2015 and cut global T&E spending 44.1 percent. Alongside outright travel reductions, Chevron's Smart Travel communication and technology strategy has decreased spending and boosted policy compliance. Chevron reorganized global travel services as part of a larger corporate reorganization in 2015. The company's travel division collaborated with corporate finance to select and implement a corporate T&E card. Chevron travelers now use American Express on an individual bill, individual pay platform.

This year, Chevron is undergoing a comprehensive travel policy review to ensure travelers can make safe, productive and cost-effective decisions. It is evaluating how to integrate ridesharing services into its ground transportation program without compromising traveler safety and policy compliance. Carlson Wagonlit Travel

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serves as Chevron's consolidated agency in the U.S. and handles 70 percent of its business globally. Chevron is in the second year of a five-year strategy with CWT. Chevron travelers worldwide book through Concur. In 2015, 82 percent of Chevron's U.S.-booked air volume went through Concur, which also provides Chevron's global expense platform.

## 50 ABBVIE

### NORTH CHICAGO, ILL.

**2015 U.S.-Booked Air Volume:** \$80 million

**Principal Online Booking Tool:** Concur Travel

**Principal Card Supplier:** Bank of America

**Principal Expense Supplier:** Concur Expense

**Consolidated U.S. TMC:** American Express Global Business Travel

*BTN* estimates that AbbVie's United-States-booked air volume for rose by \$5 million in 2015. AbbVie—a global biopharmaceutical company formed on Jan. 1, 2013, from a stock split by Abbott Laboratories—employed more than 28,000 people in 2015 and sold its products in more than 170 countries. 2015 revenue increased 22 percent to \$22.8 billion. AbbVie holds the rights to the blockbuster drug Humira, which had 2015 net sales of \$14 billion, an increase of 19 percent.

AbbVie has improved data collection in order to support duty of care, supplier negotiations and service to travelers. The company, which spent 72 percent of its 2015 U.S.-booked air volume on international airline tickets, has issued a single global travel policy. It also has issued guidelines that require its suppliers to conduct business in a legal and ethical manner. AbbVie uses an individual bill, central pay card program.

## 50 CHURCH OF JESUS CHRIST OF LATTER-DAY SAINTS

### SALT LAKE CITY

**2015 U.S.-Booked Air Volume:** \$80 million

**2015 Global Air Volume:** \$120 million

**2015 U.S. T&E:** \$100 million

**2015 Global T&E:** \$150 million

**Principal Air Supplier:** Delta

**Principal Hotel Supplier:** Marriott

**Principal Car Rental Suppliers:** Enterprise, National

**Principal Online Booking Tool:** Amadeus e-Travel Management

**Principal Card Supplier:** Bank of America

The Church of Jesus Christ of Latter-Day Saints' missionary efforts continue to grow. Missionaries account for 74,079, according to its website. Corporate travelers increased from 10,000 to 15,000 in 2015. That year, it obtained or renewed more than 50,000 visas. U.S.-booked air volume rose \$5 million in 2015 and is expected to reach \$86 million in 2016. Fifty-five percent of U.S.-booked air volume was domestic. LDS does not have a consolidated global agency, but in the United States and Canada, it primarily uses Carlson Wagonlit Travel, which handled about 5 percent of the U.S.-booked air volume in 2015. LDS previously worked with about 50 agencies

outside of North America but consolidated to 25 in 2015 after it adopted standards that some partners could not meet. LDS expects to consolidate further in the coming years.

## 50 P&G

### CINCINNATI

**2015 U.S.-Booked Air Volume:** \$80 million

**Consolidated U.S. TMC:** Egencia

P&G continues its restructuring, including the divestiture of dozens of brands, including Duracell, Iams and several beauty-related brands. *BTN* estimates the company's 2015 U.S.-booked air volume dropped slightly year over year. P&G revenue for the 12 months ending June 30, 2016, dropped about 8 percent year over year to \$65.3 billion. Net income, though, increased from \$7 billion to \$10.5 billion. The company employed 105,000 on June 30, down from 110,000 a year prior. P&G remains Egencia's largest U.S. corporate travel management client.

## 53 INTEL

### SANTA CLARA, CALIF.

**2015 U.S.-Booked Air Volume:** \$79.2 million

**2015 Global Air Volume:** \$145.6 million

**2015 U.S. T&E:** \$90 million

**2015 Global T&E:** \$180 million

**Principal Online Booking Tool:** Sabre GetThere

**Principal Expense Supplier:** Concur Expense

Technology company Intel increased its U.S.-booked air volume by \$25.7 million in 2015. Sixty percent of its United States-purchased air tickets were for international travel. The company expects to maintain a similar U.S.-booked air volume in 2016. Last year, the company's travel program enhanced quality, service and flexibility for its 46,500 business travelers, including allowing business class and premium economy class for flights longer than 10 hours.

This year, Intel is reconfiguring its travel agency hub and continuing to improve program flexibility for travelers. It will switch from Sabre GetThere to Concur Travel as its online booking tool. In 2015, 70 percent of bookings went through Intel's approved online tool, and 76 percent required no agent assistance.

## 54 TIME WARNER

### NEWYORK CITY

**2015 U.S.-Booked Air Volume:** \$78.7 million

**2015 Global Air volume:** \$100.8 million

**2015 U.S. T&E:** \$188 million

**2015 Global T&E:** \$224 million

**Principal Air Suppliers:** American, British, Delta

**Principal Hotel Suppliers:** Hilton, Marriott, Starwood

**Principal Car Rental Suppliers:** Hertz, Enterprise, National

**Principal Online Booking Tool:** Concur Travel

# 4<sup>TH</sup> ANNUAL

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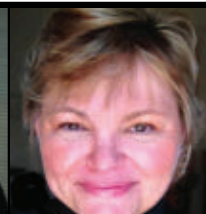
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**Principal Expense Supplier:** Concur Expense

**Principal Card Supplier:** American Express

**Global Consolidated Agency:** BCD Travel

Time Warner is a global media and entertainment company with businesses in television networks, film and TV. The company's operating divisions are HBO, Turner and Warner Bros. Entertainment.

## 55 COCA-COLA

### ATLANTA

**2015 U.S.-Booked Air Volume:** \$78 million

**2015 Global Air Volume:** \$155 million

**2015 Global T&E:** \$295 million

**Principal Car Rental Supplier:** Hertz

**Principal Card Supplier:** American Express

**Principal Online Booking Tool:** Concur Travel

**Principal Expense Supplier:** Concur Expense

**Consolidated U.S. TMC:** Carlson Wagonlit Travel

By the end of 2017, Coca-Cola plans to have refranchised its bottlers across North America. As it has been doing so, it has adapted its travel program to reduce costs via supplier sourcing, managing behavior through crowdsourcing, managing demand through policy controls and improving processes through technology. This year, Coca-Cola is implementing Concur online booking and expense globally. It also is building a global database to help with sourcing. Both American Express Global Business Travel and HRG service the company's travel outside the United States.

## 55 FACEBOOK

### MENLO PARK, CALIF.

**2015 U.S.-Booked Air Volume:** \$78 million

**Consolidated U.S. TMC:** Carlson Wagonlit Travel

BTN estimates Facebook spent \$78 million in U.S.-booked air travel in 2015. Facebook—which owns Instagram, WhatsApp and virtual reality technology Oculus, in addition to its namesake service—increased revenue 43.2 percent to \$17.9 billion in 2015, while its expenses increased 56 percent to \$11.7 billion. Facebook reported 12,691 employees as of Dec. 31. The company also paid \$775,000 for private aircraft use for chairman, CEO and co-founder Mark Zuckerberg.

## 57 CREDIT SUISSE

### ZURICH

**2015 U.S.-Booked Air Volume:** \$77 million

**2015 Global T&E:** \$384.4 million

**Consolidated Global TMC:** American Express Global Business Travel

BTN estimates Credit Suisse spent \$77 million on U.S.-booked air in 2015 as overall T&E spending increased. Credit Suisse's worldwide T&E expenses hit 381 million Swiss francs, or US\$384.4 million using the Dec. 31 exchange rate, an increase of 7.9 percent. In its annual report, Credit Suisse estimated that travel in terms of pure distance rose 4 percent in 2015. Credit Suisse encourages employees to use tele-

phone and videoconferencing and to use train travel to cut greenhouse gas emissions, according to its annual corporate responsibility report. Employees used videoconferencing rooms for 173,946 hours in 2015, a marginal increase from the prior year. Use of desktop videoconferencing through Lync rose 65 percent. Credit Suisse buys emission-reduction certificates to offset international flight-emissions. In 2015, the firm offset about 66,600 metric tons of greenhouse gases. The firm's headcount increased 5.2 percent in 2015 to 48,200 full-time-equivalent employees. Net revenue declined 7 percent.

## 57 INTERNATIONAL MONETARY FUND

### WASHINGTON, D.C.

**2015 U.S.-Booked Air Volume:** \$77 million

**Principal Hotel Suppliers:** Hilton, InterContinental, Starwood

**Principal Online Booking Tool:** Sabre GetThere

**Principal Card Supplier:** BMO Diners Club

**Principal Expense Supplier:** Oracle PeopleSoft

**Consolidated U.S. TMC:** BCD Travel's Tbiz

Due to bookings for a triennial meeting in South America, the International Monetary Fund's U.S.-booked air volume increased 4 percent in 2015. Volume is expected to dip to \$76 million in 2017. This year the IMF will review its internal trip approval system in order to encourage travelers to book farther in advance. The IMF, composed of 189 countries, promotes global growth and economic stability to member countries and developing countries. It employs about 2,600 people from 147 countries, of which 2,500 travel for work.

## 59 SANOFI

### PARIS

**2015 U.S.-Booked Air Volume:** \$74.4 million

**2015 Global Air Volume:** \$165 million

**2015 U.S. T&E:** \$250 million

**2015 Global T&E:** \$500 million

**Principal Air Suppliers:** Air France, American, Delta, United

**Principal Hotel Suppliers:** Hilton, Marriott, Starwood

**Principal Car Rental Suppliers:** Avis, Enterprise

**Principal Online Booking Tool:** Concur Travel

**Principal Card Supplier:** American Express

**Principal Expense Supplier:** Concur Expense

**Consolidated U.S. TMC:** BCD Travel

**Consolidated Global TMC:** American Express Global Business Travel

Pharmaceutical firm Sanofi brought in \$33.8 billion in revenue in 2015, and its 10,000 travelers spent 15 percent of that on T&E. U.S.-booked air volume decreased \$6.1 million from 2014's \$80.5 million, and Sanofi expects it to remain at \$74.4 million this year. In 2016, the company fielded RFPs for air, hotel, car rental and ground transportation, and it implemented a travel management dashboard. In 2016, it aims to contain costs. Of tickets purchased at U.S. points of sale in 2015, 54 percent were for domestic flights, and 80 percent were booked through approved online tools. Among onling bookings, 88 percent required no agent assistance. Sanofi uses an individual bill, central pay card program. It uses Concur Travel and Concur Expense both inside the United States and elsewhere. The company's single travel policy applies globally.

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## 60 UBS

## ZURICH

**2015 U.S.-Booked Air Volume:** \$73 million

**Principal Online Booking Tool:** Sabre GetThere

**Principal Expense Supplier:** SAP

**Principal Card Supplier:** American Express

**Consolidated U.S. TMC:** BCD Travel

Financial services and investment bank UBS focused 2015 travel management efforts on preparing for 2016 initiatives. The company set up RFPs for a data consolidation partner, and it converted to the Travelport global distribution system this year. While UBS has global online booking capability through multiple suppliers, it fielded an RFP for a global provider. The financial services company has a single global travel policy, but the program is configured regionally, with multiple agency partners. BCD Travel supports the United States, Europe, the Middle East and Africa, and Carlson Wagonlit services Asia/Pacific. Data consolidation is critical to UBS' regional strategy. UBS's search for a new data consolidation partner hinged on more advanced, integrated data to deliver better travel intelligence.

## 61 KOCH

## WICHITA, KAN.

**2015 U.S.-Booked Air Volume:** \$72.6 million

**2015 Global Air Volume:** \$93.5 million

**Consolidated Global TMC:** Carlson Wagonlit Travel

Both U.S.-booked and global air volume for Koch rose a bit more than 2 percent in 2015, owing to increased travel and to acquisitions. In 2015, Koch switched to Carlson Wagonlit Travel from BCD Travel. Koch is one of the largest private companies in America and employs more than 100,000 people, about 60,000 of them in the United States. Koch companies manufacture transportation fuel, building and consumer products, electronic connectors, fibers, fertilizers, membrane filtration pollution-control equipment and more.

## 62 EMC

## HOPKINTON, MASS.

**2015 U.S.-Booked Air Volume:** \$72 million

**2015 Global Air Volume:** \$126 million

**2015 U.S. T&E:** \$200 million

**2015 Global T&E:** \$360 million

**Principal Air Suppliers:** American, Delta, United

**Principal Hotel Suppliers:** Hilton, Marriott, Starwood

**Principal Car Rental Suppliers:** Enterprise, National

**Principal Online Booking Tool:** Concur Travel

**Principal Card Supplier:** American Express

**Principal Expense Supplier:** Concur Expense

**Consolidated Global TMC:** American Express Global Business Travel

Information management and technology company EMC decreased its U.S.-booked air volume by \$3 million in 2015. Sixty-five percent of those tickets were for domestic travel. Last year, EMC's travel program increased online adoption globally and brought travel services

for other markets under its Barcelona hub. It increased the number of days in advance travelers are required to buy domestic airfare from 10 to 14. Eighty-eight percent of 2015 bookings went through the tool, and 86 percent required no agent assistance. EMC uses a central bill, central pay card model. The company's 43,000 business travelers file expenses using Concur Expense. In September, Dell acquired EMC for \$60 billion. The merged company, to be named Dell Technologies, has 140,000 employees globally. The elimination of 2,000 to 3,000 jobs is expected, mostly in the United States.

## 63 UNITEDHEALTH GROUP

## MINNETONKA, MINN.

**2015 U.S.-Booked Air Volume:** \$71.8 million

**Principal Air Suppliers:** American, Delta, Southwest

**Principal Hotel Suppliers:** Hilton, Hyatt, Marriott

**Principal Car Rental Suppliers:** Enterprise, Hertz, National

**Principal Online Booking Tool:** Concur Travel

**Principal Card Supplier:** US Bank

**Principal Expense Supplier:** Concur Expense

**Consolidated U.S. TMC:** BCD Travel

**Consolidated Global TMC:** BCD Travel

UnitedHealthcare's 50,000 travelers spent 16 percent more on U.S.-booked air volume in 2015 than the \$62 million the company's travelers spent in 2014. Then again, that year, the traveler pool numbered only 40,000. The insurance company expects the number to edge up to \$75 million in 2016. Ninety-five percent of the tickets its travelers booked in the United States in 2015 were for domestic travel. Revenue hit \$157 billion in 2015, and that year, the company put out a global air RFP. It also adjusted its business class policy. It has a single policy that applies globally. Eighty-five percent of the tickets booked in the United States were booked through approved tools, and 60 percent were completed without assistance from a travel agent. The company's primary booking and expense tools, both inside the United States and elsewhere, are Concur.

## 64 HONEYWELL

## MORRISTOWN, N.J.

**2015 U.S.-Booked Air Volume:** \$71 million

**Consolidated U.S. TMC:** American Express Global Business Travel

Honeywell's U.S.-booked air volume decreased in 2015. Selling, general and administrative expenses decreased to \$5 billion from \$5.5 billion in 2014, driven by the favorable impact from foreign currency translation, increased pension income, decreased indirect costs and benefits from repositioning, which were also partially offset by increased labor costs. Net sales for the multinational engineering and aerospace company also decreased from \$40.3 billion to \$38.6 billion.

Honeywell employed 129,000 people at the end of 2015, up from 127,000 the previous year. Approximately 49,000 of those were located in the United States, down from 50,000 at the end of 2014. In July 2016, Honeywell agreed to acquire warehouse automation systems supplier Intelligrated for \$1.5 billion. The Ohio-based company employed more than 3,100 people at the time of its acquisition.

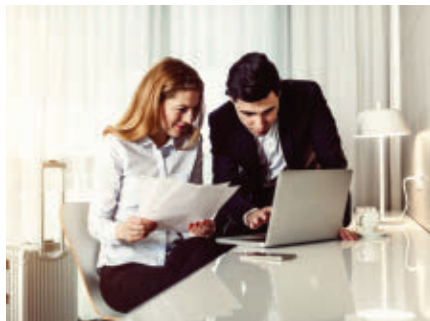
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## 64 OMNICOM GROUP

### NEW YORK CITY

**2015 U.S.-Booked Air Volume:** \$71 million

**Principal Air Suppliers:** American, Delta

**Principal Car Rental Suppliers:** Budget, Hertz

**Principal Online Booking Tool:** Concur Travel

**Principal Card Supplier:** Bank of America

BTN estimates Omnicom Group's 2015 U.S.-booked air volume increased by 12.7 percent from the previous year. Revenue decreased 1.2 percent to \$15.1 billion, and Omnicom's U.S. operations represented 56 percent of that revenue. The marketing, advertising and corporate communications company has more than 5,000 clients in over 100 countries. As of Dec. 31, it employed 74,900 people worldwide.

## 66 BAYER

### LEVERKUSEN, GERMANY

**2015 U.S.-Booked Air Volume:** \$67.5 million

**2015 U.S. T&E:** \$150 million

**Principal Air Suppliers:** American, Delta, United

**Principal Hotel Suppliers:** Hilton, InterContinental, Marriott

**Principal Car Rental Supplier:** National

**Principal Online Booking Tools:** Concur Travel, Onesto

**Principal Card Suppliers:** American Express, Citi

**Principal Expense Supplier:** Concur Expense

**Consolidated U.S. TMC:** BCD Travel

Bayer increased spending on U.S.-booked air volume by 14.6 percent in 2015, the first full year following its acquisition of Merck's consumer care business. Last year, it spun off its polymer materials business, representing more than 15,000 employees, into a company called Covestro. On Sept. 14, 2016, Bayer agreed to acquire agriculture firm Monsanto. At the time of the deal, the businesses' combined R&D budget was €2.5 billion, and their 2015 sales combined to hit €23 billion. They expect the deal to close by the end of 2017.

Bayer conducted a corporate card RFP in 2015 and this year is implementing a global card program with American Express and Citi. It rolled out Concur Expense globally in 2014, and Concur also provides the online booking tool for U.S. travelers; 69 percent of Bayer's U.S.-booked air went through that tool in 2015. Travelers in Germany book through Onesto. Bayer also revised its parameters around air bookings in 2015. BCD Travel handles Bayer's U.S. business and a portion of its business outside the United States.

## 67 DELL

### ROUND ROCK, TEXAS

**2015 U.S.-Booked Air Volume:** \$67 million

**2015 Global Air Volume:** \$110 million

**2015 U.S. T&E:** \$200 million

**2015 Global T&E:** \$330 million

**Principal Air Suppliers:** American, Delta, United

**Principal Hotel Suppliers:** Hilton, Marriott, Starwood

**Principal Car Rental Suppliers:** Enterprise, National

**Principal Online Booking Tool:** Concur Travel

**Principal Card Supplier:** American Express

**Principal Expense Supplier:** Concur Expense

**Consolidated Global TMC:** American Express Global Business Travel

The travel program at computing technology firm Dell last year deployed rate-shopping tools for hotel and air, strengthened controls on its card program and maximized unused airline ticket funds. The company also altered its travel policy to globalize daily meal limits and changed its receipt-requirement threshold. Dell travelers book online through Concur Travel and file expenses through Concur Expense. The company's 2015 U.S.-booked air volume decreased by \$13 million from 2014, and 70 percent of U.S.-booked tickets were for domestic travel. This year, Dell's travel program is focused on successful integration with EMC, having completed the \$60 billion acquisition of the information management and technology company in September. Soon-to-be-named Dell Technologies, the combined company of Dell and EMC has approximately 140,000 employees, though layoffs of between 2,000 and 3,000 employees are expected, mostly in the United States in the supply, marketing and general administration divisions.

## 68 WALMART

### BENTONVILLE, ARK.

**2015 U.S.-Booked Air Volume:** \$66 million

**Primary U.S. TMC:** Carlson Wagonlit Travel

BTN estimates that retail giant Walmart's 2015 U.S.-booked air volume roughly held steady year over year. That stabilization comes after a few years of increases. Walmart indicated that in 2014, it generated 70,290 metric tons of carbon dioxide-equivalent emissions via its business travel in the United States and South Africa, as well as car rentals in Africa. That figure had increased by about 50 percent since 2011, likely due to more air travel and to better data collection. Total revenue for the 12 months ending Jan. 31, 2016, was \$482.1 billion, down less than one percentage point from the prior 12 months. Net income from continuing operations dipped about 9 percent to \$14.7 billion. Walmart had about 2.3 million associates as of Jan. 31, up from about 2.2 million the year before.

## 69 MARSH & MCLENNAN COS.

### NEW YORK CITY

**2015 U.S.-Booked Air Volume:** \$64.5 million

**2015 Global Air Volume:** \$122.4 million

**2015 U.S. T&E:** \$150 million

**2015 Global T&E:** \$279 million

**Principal Air Suppliers:** British, Delta, United

**Principal Hotel Suppliers:** Hilton, Marriott, Starwood

**Principal Car Rental Suppliers:** Enterprise, Hertz, National

**Principal Online Booking Tool:** Sabre GetThere

**Principal Expense Supplier:** Oracle Internet Expenses

**Principal Card Supplier:** American Express

**Consolidated Global TMC:** BCD Travel

In 2015, Marsh & McLennan Cos. focused on cost containment, which included negotiating with airlines and hotels, extending its BCD Travel program to the Pacific region, managing travel demand and improving compliance to preferred suppliers. The professional

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## 24<sup>h</sup> Elevating Self-Service Capabilities And Corporate Travel Support

- More powerful agency self-service tools, industry leading rebooking capabilities, transparent policies and communications continue to roll out, so corporations and agencies stay updated on changes and advancements that matter the most.
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services firm's U.S.-booked air volume rose by 2.4 percent in 2015. Marsh & McLennan expects keep that figure flat in 2016 by continuing to manage demand and encourage compliance and by incorporating mobile apps. Sixty percent of U.S.-booked air volume is domestic, while international represents 40 percent. The firm has 26,000 global corporate cardholders, of which 12,500 are based in the United States. Its American Express corporate card program is mainly individual bill, individual pay. The firm primarily uses GetThere to book travel in the United States and KDS elsewhere.

## 70 TOYOTA MOTOR SALES U.S.A.

### TORRANCE, CALIF.

**2015 U.S.-Booked Air Volume:** \$64.4 million

**2015 U.S. T&E:** \$154.3 million

**Principal Air Suppliers:** ANA, Delta, United

**Principal Hotel Suppliers:** Hilton, Marriott

**Principal Car Rental Suppliers:** Enterprise, Hertz, National

**Principal Online Booking Tool:** Sabre GetThere

**Principal Card Supplier:** American Express

**Principal Expense Supplier:** Chrome River

**Consolidated U.S. TMC:** BCD Travel

Toyota Motor Sales U.S.A. removed per diems from its travel policy in 2015 and updated its business class travel policy. It also implemented a Dinova dining rebate program and aligned its travel policy across its sales, operations and manufacturing groups, a nod to TMS's multiyear process to align those divisions. By 2017, it expects to have closed its two North American headquarters offices—in Torrance, Calif., near Los Angeles, and Erlanger, Ken., near Cincinnati—and consolidated into a new headquarters in Plano, Texas, near Dallas. Some other facilities and physical reorganization are part of the process. And thus, the company's 2016 goals include improving relocation services.

In 2015, TMS spent 14 percent more on U.S.-booked air volume than it did in 2014, when it spent \$56.3 million. For 2016, TMS expects that number to rise 28 percent to \$82.5 million. Meanwhile, cost savings will be a focus for minor policy changes implemented this year. Of the tickets purchased at U.S. points of sale in 2015, 83 percent were for domestic travel. All tickets purchased at U.S. points of sale were booked through approved online tools, and 70 percent of those required no agent assistance. TMS had 15,100 travelers in 2015; revenue reached \$80 billion.

## 71 MORGAN STANLEY

### NEWYORK CITY

**2015 U.S.-Booked Air Volume:** \$63.8 million

**Primary Online Booking Tool:** Proprietary tool

**Consolidated U.S. TMC:** American Express Global Business Travel

Morgan Stanley in 2015 redesigned its proprietary online booking tool, Corporate Travel Services Online, which originally launched in 2014, to make the interface more user friendly. This year, the firm created focus groups to demo the tool and anticipates relaunching in early 2017. In April 2016, global adoption of CTSO was 71 percent, up from 63 percent in 2014.

In the first quarter of 2015, Morgan Stanley outsourced such U.S. and U.K. services as email reservations and back-office functions to India, as it had previously done in Asia. The firm also crosstrained agents across markets, yielding an 8 percent reduction in annual operating costs. Following a similar initiative in the U.S., Morgan Stanley allowed half its travel agents in the U.K. to work from home. This allowed the firm to consolidate additional countries into the regional service centers in London.

In 2016, Morgan Stanley developed an automated process to reconcile business travel account cards. It also launched an RFP for a global online booking tool for ground transportation, which is not included in its CTSO.

*BTN* estimates Morgan Stanley's 2015 U.S.-booked air volume decreased by 3 percent year over year to \$63.8 million. It employs about 55,000 people in 43 countries. Full year net revenue for 2015 totaled \$35.2 billion, up about 3 percent.

## 72 L-3

### NEWYORK CITY

**2015 U.S.-Booked Air Volume:** \$63.3 million

**Principal Card Supplier:** American Express

**Consolidated Global TMC:** American Express Global Business Travel

*BTN* estimates that aerospace and defense contractor L-3 spent \$63.3 million in U.S.-booked air volume in 2015, an 8 percent decrease. However, for 2016, air volume is expected to increase 7 percent to 68 million, owing to new business. L-3 consolidates its travel services for the United States, Canada, the United Kingdom, Germany, United Arab Emirates, India, Singapore, South Korea and Australia under American Express Global Business Travel. Annual sales for 2015 totaled \$10.5 billion. According to the firm's website, L-3 has 38,000 employees, a decrease from the 45,000 reported in 2014. In September 2016, it entered into a contract to acquire Mireo, a specialized electronic warfare subsystems provider based in Australia. Mireo is expected to generate AUD\$35 million, or US\$27 million, in sales in 2017.

## 73 DANAHER

### WASHINGTON, D.C.

**2015 U.S.-Booked Air Volume:** \$63 million

Danaher reduced its U.S.-booked air volume by more than 10 percent in 2015, according to a *BTN* estimate. Danaher operates in dental products, life sciences and diagnostics, measurement and environmental products, among other areas, and owns more than 40 companies. The conglomerate spun off several firms in its industrial technology and other sectors in July 2016 to form Fortive, a standalone, publicly traded company with an estimated value of \$6 billion. In recent years, Danaher has consolidated U.S. travel services of many of its subsidiaries under American Express Global Business Travel and BCD Travel. The company's revenue increased more than 7 percent in 2015 to about \$20.6 billion. Net earnings increased 2 percent to about \$2.6 billion. Danaher employed 81,000 people at the end of 2015, compared with 71,000 the year before. Some now are part of Fortive.

# Starwood's Sheraton Hotels & Resorts

A year into one of its largest brand redevelopment efforts in its 80-year history, Starwood Hotels & Resorts continues to unveil the results of Sheraton 2020, a bold, all-encompassing, 10-point plan to put “Sheraton back on its rightful pedestal as a global hotel brand of choice, everywhere.”

The five-year vision to move the brand into the future touches everything from positioning and marketing to programming and design, all supported with an unprecedented marketing investment designed to “turn heads, change minds and deliver great experiences to our guests.”

## New Hotels, Grand Tier

Sheraton Grand is the new premier tier that represents exceptional Sheraton properties in enticing destinations, offering distinguished designs, and excellence in service and guest experiences. Sheraton in June opened its first new build Grand tier property in Hangzhou, China, and unveiled the recently renovated Sheraton Grand Park Lane in London. With 25 Sheraton Grand properties open today, the company by 2020 expects to offer 100+ Sheraton Grand properties in key locations worldwide. In addition, officials plan to further strength the Sheraton brand by adding 150 new hotels by 2020.

Sheraton Grand Chicago Club Lounge



Sheraton Grand Chicago lobby

## Excellence In Service Delivery

The plan also calls for a “maniacal and consistent focus on excellence in service delivery, including cleanliness,” responsiveness to guests and room condition, according to company officials. The brand is reinvigorating associate training, and seeking to create a consistent experience at every property around the world, embodied in a key marketing message that “actions speak louder.”

## Reclaim Status As THE Meeting Brand

Efforts also are underway to reclaim Sheraton’s status as the “go-to-brand for top planners and customers and to take back group share.” Starwood’s SPG® Pro loyalty program for business-to-business professionals provide tools like custom event websites, simple contracts, ebilling and meeting space insights, and allows members to earn points and free room nights for meetings and events planned.

## Innovative Guest Offerings

As part of Sheraton 2020, the brand also wants to “unleash the potential of Sheraton Club,” which offers 24/7 access to a lounge with complimentary continental breakfast, evening hors d’oeuvres and all-day snacks. In addition, Club level guests receive complimentary internet both in-room and in the lounge.

## Marketing and Brand Positioning

An unprecedented marketing campaign is designed to help travelers and managers understand the new Sheraton brand positioning, along with a new visual identity which debuted on Sheraton.com. Desktop, mobile and tablet friendly, the new digital platform provides an easier booking process, “Find Reservation” technology, and detailed service offerings at more than 440 Sheraton properties worldwide.

## Work Smarter, More Efficiently

Sheraton hotels make it easy for your travelers to stay online and in touch. Sheraton lobbies are equipped with a multitude of outlets, connectivity ports and free Wi-Fi. And SPG® members get free in-room Internet, simply by booking on Sheraton.com, any Starwood brand website or the SPG App. Fully-equipped business centers with copying, printing, faxing and shipping, provide an easy way for travelers to get their work done.

To learn more about the new Sheraton, visit [Sheraton.com](http://Sheraton.com)



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## 74 JOHNSON CONTROLS

### MILWAUKEE

**2015 U.S.-Booked Air Volume:** \$61.6 million

**Principal Card Supplier:** US Bank

In 2015, manufacturing company Johnson Controls divested its automotive seating and interiors business. The spinoff of Aidient, as it's been renamed, is expected to finalize in the fourth quarter of this year, and Johnson Controls has been cloning its the travel program for Aidient. In September 2016, Johnson Controls completed its merger with Tyco, the electronic security and fire protection systems company.

Johnson Controls' 2015 U.S.-booked air volume, which represented 66 percent domestic travel, remained stagnant against 2014. The company expects that volume to rise to \$62 million in 2016. In the United States, it consolidates most TMC services under American Express Global Business Travel.

## 75 BARCLAYS

### LONDON

**2015 U.S.-Booked Air Volume:** \$60 million

British banking and financial services company Barclays increased spending on travel and accommodations 2.3 percent to £218 million in 2015, or US\$323.2 million using the Dec. 31 exchange rate. *BTN* estimates the company increased its U.S.-booked air volume slightly to \$60 million. That increase comes after a significant year-over-year cut in travel and accommodations spending in 2014 from 2013's £307 million. Cutting back on travel was a key part of the company's goal to cut carbon emissions. Barclays reduced carbon emissions by 10 percent in 2015 and has cut emissions 37.3 percent against 2012 levels. Even as travel increased last year, the company more than made up the difference in reducing carbon emissions from use of company cars and energy conservation. Barclays also has designed a data reporting system for itself, Atlas, which combines TMC booking data, supplier contracts, service-level agreements and HR data to produce dashboards detailing total spending, traveler behavior and contract performance.

## 76 FIDELITY

### BOSTON

**2015 U.S.-Booked Air Volume:** \$59.5 million

**2015 Global Air Volume:** \$68.4 million

**2015 Global T&E:** \$260 million

**Principal Air Suppliers:** American, Delta, JetBlue United

**Principal Hotel Suppliers:** Hilton, Marriott, Starwood

**Principal Car Rental Suppliers:** Enterprise, National

**Principal Expense Supplier:** Oracle

**Principal Card Supplier:** American Express

**Consolidated U.S. TMC:** BCD Travel

Fidelity Investments' U.S.-booked air volume stayed somewhat flat in 2015, increasing from 2014's \$59 million. The financial services company shifted to a regional travel management strategy, working with Hillgate Travel for its United Kingdom and Ireland business and Swire Travel for its business in China and Hong Kong. Late last year, the company sent out

a TMC RFP and selected BCD Travel as its consolidated agency for North America and India. Fidelity previously used BCD Travel and Orbitz for Business in the United States. In August 2016, Fidelity deployed Sabre GetThere as its new online booking tool in North America. The travel program continues to use analytics tools and scorecards and hosts an annual virtual travel fair in which vendors exhibit products through blogs on Fidelity's internal social media platform. In 2015, the workforce grew from 42,000 to 45,000. Fidelity's revenue increased 6 percent to \$15.9 billion.

## 77 LILLY

### INDIANAPOLIS

**2015 U.S.-Booked Air Volume:** \$59 million

**2015 Global Air Volume:** \$106 million

**Principal Air Suppliers:** Delta, Southwest, United

**Principal Hotel Suppliers:** Marriott, Starwood

**Principal Car Rental Suppliers:** Enterprise, National

**Principal Online Booking Tool:** Concur Travel

**Principal Card Supplier:** US Bank Visa

**Principal Expense Supplier:** IBM Global Expense Reporting Solutions

**Consolidated Global TMC:** Carlson Wagonlit Travel

In 2015, global pharmaceutical company Lilly decreased its U.S.-booked air volume from 2014's \$65 million. The company for the first time used comprehensive data to establish its global air agreement. It altered its U.S. travel policy to reduce business class travel to Europe. In 2016, it has plans to streamline and integrate its data around T&E. The travel program intends to implement a single global travel policy, with local procedures, and to test the impact of using more direct flights within North America.

The company uses Concur Travel as its online booking tool in the United States and Sabre GetThere in other global regions. Last year, 80 percent of bookings went through approved online channels and 75 percent required no agent assistance. Lilly uses US Bank Visa as its corporate card provider inside the United States and Citibank Visa outside the United States. This year, the company switched from IBM Global Expense Reporting Solutions to Concur Expense.

## 77 VERIZON

### NEWYORK CITY

**2015 U.S.-Booked Air Volume:** \$59 million

**Consolidated Global TMC:** American Express Global Business Travel

*BTN* estimates Verizon Communications spent \$59 million on U.S.-booked air spend in 2015. The communications company closed its merger with AOL in June 2015 at which time AOL became a wholly-owned subsidiary of Verizon. As of December, Verizon employed approximately 177,700. Revenue for 2015 was \$131.6 billion, up approximately 3.5 percent. Verizon is looking at the strength of its mobile coverage as a foundation for growth but has also set its sights on new revenue streams. The merger with AOL has put online content in the forefront by adding Engadget, The Huffington Post and TechCrunch to its business portfolio. The company launched a mobile-first social entertainment platform called Go90, aimed at Millennial customers. The Internet of Things has also emerged as a new revenue stream. Verizon has seen significant success with IoT fleet management solutions.

## 79 BASF

## LUDWIGSHAFEN, GERMANY

**2015 U.S.-Booked Air Volume:** \$58 million

**2015 U.S. T&E:** \$128 million

**2015 Global Air Volume:** \$210 million

**2015 Global T&E:** \$320 million

**Principal Airline Suppliers:** American, Delta, United

**Principal Hotel Suppliers:** Hilton, InterContinental, Marriott

**Principal Car Rental Suppliers:** Enterprise, Hertz

**Principal Online Booking Tools:** Sabre GetThere, iFAO Cytric

**Principal Card Supplier:** JPMorgan Chase

**Principal Expense Supplier:** SAP

**Consolidated U.S. TMC:** American Express Global Business Travel

BASF, the world's largest chemical producer, trimmed its U.S.-booked air volume 6.5 percent in 2015 and is reducing travel further this year. The company is consolidating its travel program globally. Last year, it completed the first phase to move to a single TMC for travel operations and procurement worldwide. This year, it is selecting a TMC partner and beginning the transition to a single global agency. American Express Global Business Travel, Carlson Wagonlit Travel and BCD Travel handle its program in various regions. In 2015, 80 percent of air volume booked from the United States was booked through the tool.

## 80 DEUTSCHE BANK

## FRANKFURT, GERMANY

**2015 U.S.-Booked Air Volume:** \$57.6 million

**2015 Global Air Volume:** \$183.2 million

**2015 U.S. T&E:** \$112 million

**2015 Global T&E:** \$470.6 million

**Principal Online Booking Tool:** Sabre GetThere

**Principal Card Supplier:** American Express

**Principal Expense Supplier:** Concur Expense

**Consolidated U.S. TMC:** HRG

Deutsche Bank's U.S.-booked air volume fell from \$67.9 million in 2014. Last year, the company completed the deployment and integration of its fully automated pre-trip approval system. The travel program focused on fleet and ground transportation, leveraging technology to manage demand, provide transparency and improve user experience. It also used its robust data platform and reporting capability to drive down demand for travel. This year, the company expects to once more decrease its travel spending. The program is identifying opportunities for additional consolidation, channel bypass and supplier rationalization.

Deutsche Bank works with HRG as its consolidated agency in North and South America, while American Express Global Business

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Travel and BCD Travel serve as its agency partners elsewhere. In the United States, travelers book travel through Sabre GetThere, while internationally travelers use Concur Travel and GetThere. Sixty-four percent of U.S. bookings were made through approved online channels in 2015, and 70 percent required no agent assistance. The company uses an individual bill, central pay model.

## 81 ALLSTATE

### NORTHBROOK, ILL.

**2015 U.S.-Booked Air Volume:** \$57 million

**2015 Global Air Volume:** \$61 million

**2015 U.S. T&E:** \$187 million

**2015 Global T&E:** \$197 million

**Principal Air Suppliers:** Delta, Southwest, United

**Principal Hotel Suppliers:** Hilton, InterContinental, Marriott

**Principal Car Rental Suppliers:** Avis, Budget, Enterprise, Hertz, National

**Principal Online Booking Tool:** Concur Travel

**Principal Card Supplier:** Citi MasterCard

**Principal Expense Supplier:** SAP

**Consolidated U.S. TMC:** Travel and Transport

Allstate slightly increased its U.S.-booked airline volume 3.6 percent in 2015. The second-largest personal insurer in the United States is on track to grow that by an additional 14 percent this year. The company refreshed its travel policy last year, addressing when sharing economy providers and ancillary airline purchases are permissible. Allstate also automated compliance reporting and moved U.S. expense reporting to the SAP platform. This year, the company is centralizing its meetings policy and rolling out a strategic meetings management program. Travel and Transport is Allstate's consolidated agency in the United States, and other Radius partners handle some of its non-U.S. business, including Cox & Kings in India and Vision 2000 Travel Group in Canada.

## 81 SAMSUNG

### SEOUL, SOUTH KOREA

**2015 U.S.-Booked Air Volume:** \$57 million

**Principal Air Suppliers:** American, Korean Air, United

**Principal Hotel Suppliers:** Hilton, Marriott, Starwood

**Principal Car Rental Suppliers:** Hertz, National

**Principal Online Booking Tool:** Sabre GetThere

**Principal Card Supplier:** Visa

**Principal Expense Supplier:** Proprietary tool

Samsung adjusted its hotel rate caps and implemented a global RFP hotel tool in 2015. This year, the company is simplifying the travel approval process. The electronics company is its own corporate travel department and handles all bookings in the United States. It does not have a global consolidated agency but primarily uses Carlson Wagonlit Travel. Its U.S.-booked air volume rose 7 percent in 2015 and is expected to rise to \$60 million in 2016. Sixty percent of U.S.-booked air travel is domestic. Samsung had 6,000 travelers in 2015 and reported 319,000 employees in 84 countries in 2014, its latest available figures. Different regions have their own travel policies. Travelers use an internal tool developed by Samsung to report expenses. Samsung reported \$177.4 million in revenue for 2015, up 2.8 percent.

## 83 21ST CENTURY FOX

### NEWYORK CITY

**2015 U.S.-Booked Air Volume:** \$54.4 million

**2015 U.S. T&E:** \$73 million

**Principal Air Suppliers:** American, British, Delta

**Principal Hotel Suppliers:** Hilton, InterContinental, Marriott

**Principal Car Rental Suppliers:** Enterprise, Hertz, National

**Principal Online Booking Tools:** Sabre GetThere, HRG Online

**Principal Card Supplier:** American Express

**Principal Expense Suppliers:** Concur, Oracle PeopleSoft

**Consolidated U.S. TMC:** HRG

21st Century Fox is moving its travel program into the virtual world. The media conglomerate selected a virtual payment product for hotel direct billing in 2015 and is setting up the program this year. The company also has been automating the central billing accounts for its air, hotel and car programs. The company is working to move more of its travel agency business online. Travelers use Sabre's GetThere tool in the United States, and 87 percent of their air volume went through that tool in 2015. That's an uptick from the prior year, after booking mandates. This year, 21st Century Fox is working to deploy International SOS traveler tracking.

The company's U.S.-booked air volume dropped 6.2 percent in 2015. Having renewed contracts with secondary airlines last year, it's renegotiating its primary airline deals this year. It implemented a new primary car rental supplier last year, as well. HRG, 21st Century Fox's consolidated U.S. TMC, also serves the United Kingdom.

## 84 MCKESSON

### SAN FRANCISCO

**2015 U.S.-Booked Air Volume:** \$54 million

**2015 Global Air Volume:** \$201 million

**2015 U.S. T&E:** \$184 million

**2015 Global T&E:** \$61 million

**Principal Air Suppliers:** American, Delta, United

**Principal Hotel Suppliers:** Hilton, Hyatt, Marriott

**Principal Car Rental Suppliers:** Avis, Hertz

**Principal Online Booking Tool:** Concur Travel

**Principal Expense Supplier:** SAP

**Principal Card Supplier:** American Express

McKesson's United States-booked air volume increased 8 percent in 2015, owing to company acquisitions. The pharmaceutical company, however, is working to control costs in 2016 and decrease U.S.-booked volume to \$46 million. It plans to decrease internal travel by 25 percent and increase the use of teleconferencing. Last year it also cut the number of hotel properties and chain relationships by 50 percent to consolidate volume. McKesson has become stricter on enforcing program compliance, which allowed the company to abandon pre-trip approval. Additionally, it created a leisure program for its travelers, which extends corporate discount rates to employees renting cars for personal use. In 2016, the company has plans to implement meetings cards, promote ridesharing like Uber and Lyft over rental cars and taxis, increase the company's rebate and implement spend-tracking tools per business unit.

# South African Airways



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partners—SA Express, Airlink and Mango—offers easy, seamless connections to more than 75 cities in Africa including Cape Town, Durban, Nairobi, Lagos and Windhoek, just to name a few.

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## 85 AON

## LONDON

**2015 U.S.-Booked Air Volume:** \$53.7 million

**Principal Air Suppliers:** American, Delta, United

**Principal Hotel Suppliers:** Fairmont, Hilton, Marriott

**Principal Car Rental Suppliers:** Avis, Budget

**Principal Online Booking Tool:** Sabre GetThere

**Principal Expense Supplier:** Oracle PeopleSoft

**Principal Card Supplier:** American Express

**Consolidated U.S. TMC:** Carlson Wagonlit Travel

Consulting and insurance firm Aon increased spending on U.S.-booked air 1.9 percent in 2015. This year, it aims to improve compliance to the travel program, including driving more bookings through its agency and preferred booking tools. Aon's primary agency is Carlson Wagonlit Travel. Aon travelers in the United States use Sabre's GetThere and booked 87 percent of air travel through that tool in 2015.

## 86 AMGEN

## THOUSAND OAKS, CALIF.

**2015 U.S.-Booked Air Volume:** \$53.5 million

**2015 Global T&E:** \$210 million

**Principal Air Suppliers:** Delta, United

**Principal Hotel Suppliers:** Hilton, Hyatt, Marriott

**Principal Car Rental Supplier:** Hertz

**Principal Online Booking Tool:** Concur Travel

**Principal Card Supplier:** American Express

**Consolidated Global TMC:** Carlson Wagonlit Travel

Pharmaceutical and biotechnology firm Amgen increased its U.S.-booked air volume 8.1 percent in 2015. The company projects a more modest 6 percent increase this year. Raising travel policy compliance was a focus for Amgen in 2015, so while the company did not make any major changes to policy, it ramped up enforcement. About 70 percent of Amgen's U.S.-booked air went through its primary booking tool, Concur Travel, which the company wants to consolidate globally. Amgen's travel program is consolidated with Carlson Wagonlit Travel globally.

## 87 NESTLE

## VEVEY, SWITZERLAND

**2015 U.S.-Booked Air Volume:** \$52 million

**Principal Online Booking Tool:** Concur Travel

**Consolidated U.S. TMC:** BCD Travel

After a one-year absence, food and beverage conglomerate Nestle rejoins the Corporate Travel 100, as *BTN* estimates its 2015 U.S.-booked air volume increased after a decline in 2014.

The company has taken several steps, including budget cuts and strictly interpreting corporate travel policy, to reduce travel and its associated environmental impact. Nestle promotes remote conferencing and other technology as alternatives to travel, and displays greenhouse gas-emission information along with fares to users of its Concur Travel online booking tool. The company also pushes users to rent electric cars.

As a result, Nestle's air travel and rental car use generated an estimated 242,800 metric tons of carbon dioxide equivalent in 2014, down from 254,700 in 2013. Given an increase in headcount, the company's efforts to reduce travel led to the avoidance of 16,600 metric tons of emissions.

Nestle's 2015 corporate revenue declined about 3 percent to 88.8 billion Swiss francs, or US\$89.6 billion. Net profit declined about 37 percent to 9.1 billion Swiss francs, also US\$9.1 billion based on the Dec. 31, 2015, exchange rate. The company had 335,000 employees at the end of 2015, about 4,000 more than it had in December 2014.

## 87 WPP

## LONDON

**2015 U.S.-Booked Air Volume:** \$52 million

**Consolidated Global TMC:** BCD Travel

Multinational advertising and public relations company WPP's air travel, measured in miles, increased 5 percent in 2015. Per employee, air travel rose 1 percent, while WPP also increased its headcount of permanent employees 23 percent to 124,930. Revenue increased 6.1 percent. *BTN* estimates WPP spent \$52 million on U.S.-booked air volume in 2015. The company uses audio- and videoconferencing to replace some face-to-face meetings. In 2015, it added 43 videoconferencing units, bringing its total to more than 700 in 160 cities. Use of those systems increased 6 percent year over year in 2015. WPP also offsets all its carbon emissions from air travel via "support of renewable energy generation projects in fast-growing economies," according to its annual report.

## 89 PUBLICIS WORLDWIDE

## PARIS

**2015 U.S.-Booked Air Volume:** \$51.2 million

**Principal Air Suppliers:** American, Delta

**Principal Hotel Suppliers:** Starwood

**Principal Car Rental Suppliers:** Avis, Budget

**Principal Online Booking Tool:** American Express Global Business Travel's Axiom

**Principal Card Supplier:** American Express

**Consolidated Global TMC:** American Express Global Business Travel

Publicis Worldwide's U.S.-booked air volume declined modestly in 2015 from \$53.1 million in 2014. The advertising and public relations firm's revenue rose 32 percent to €9.6 billion last year, though organic growth was a modest contributor. Publicis has been an active acquirer and last year closed its purchase of Sapient, as well as smaller firms across the globe. The Paris-based firm, with a presence in more than 100 countries, employs 78,000 people worldwide.

Within the United States, Publicis uses American Express Global Business Travel's Axiom tool, powered by Deem, for online booking. Outside the United States, Publicis travelers book online using Concur. Publicis has made efforts to encourage videoconferencing and has incorporated such options in its pre-trip approval process.

## 90 BP

## LONDON

**2015 U.S.-Booked Air Volume:** \$51 million

**2015 Global Air Volume:** \$156 million

**Principal Air Suppliers:** British, Emirates, Lufthansa, United

**Principal Hotel Suppliers:** AccorHotels, InterContinental, Hilton

**Principal Car Rental Supplier:** Hertz

**Principal Online Booking Tool:** Sabre GetThere

**Principal Expense Supplier:** IBM Global Expense Reporting Solutions

**Consolidated Global TMC:** Carlson Wagonlit Travel

As energy markets flounder, BP's travel program continues to cut costs. In 2014, the company's U.S.-booked air volume landed slightly below \$70 million, roughly a 25 percent drop from 2013. In 2015, it dropped again, to \$51 million.

Even so, advanced data intelligence has underpinned aggressive negotiations with suppliers as BP looks to drive value into each business trip. Despite decreased volume, BP's current contracts are more favorable across air, hotel, chauffeured ground and TMC partners compared to prior agreements. The favorability of its card program agreement with American Express is unchanged despite spend reductions.

The strong data foundation also supported BP's 2015 compliance initiatives and helped move more booking volume to the online booking tool. The effort drove a 10 percent leap in the number of bookings made through the OBT on a global basis. The company saw a 5 percent increase in compliance with lowest logical airfares and drove advance bookings up by 4 percent. This year, BP deployed its OBT in two more countries and continues to advance compliance initiatives.

BP was forced to search for a new expense reporting solution after IBM pulled its standalone Global Expense Reporting System product. The company has not disclosed its decision on that front. BP has prioritized mobile booking and itinerary management in the second half of 2016. It is in final negotiations with a third-party mobile technology provider and plans to use an off-the-shelf tool with some customization.

## 91 BOSTON SCIENTIFIC

## MARLBOROUGH, MASS

**2015 U.S.-Booked Air Volume:** \$50.3 million

**2015 Global Air Volume:** \$80 million

**2015 U.S. T&E:** \$133.8 million

**2015 Global T&E:** \$238 million

**Principal Airlines Suppliers:** American, Delta, United

**Principal Hotel Suppliers:** Hilton, Marriott, Starwood

**Principal Car Rental Supplier:** Hertz

**Principal Online Booking Tool:** Concur Travel

**Principal Card Supplier:** Citi

**Principal Expense Supplier:** Concur Expense

**Consolidated U.S. TMC:** American Express Global Business Travel

Boston Scientific has deepened its data visibility through increased globalization of its booking, expense and travel management platforms.

Concur Expense became the medical solutions supplier's global expense platform in 2015 as the company implemented it in Europe, Asia, the Middle East and Australia. This also standardized travel sys-

tems and processes. The company also implemented Concur Travel in Europe last year.

American Express Global Business Travel, Boston Scientific's consolidated agency for the United States, has taken on more of its global business. This year, Boston Scientific consolidated nine European travel offices into Amex GBT's travel center in Barcelona. An exclusive team will service Boston Scientific travelers. The company also has expanded its program to Colombia and Brazil. Boston Scientific has created a compliance scorecard that captures travel, expense and financial data from Amex GBT, Concur and internal financial systems to compare spending versus budgets.

Policy changes in 2015 included eliminating reimbursement for home Internet and a requirement for travelers visiting Boston Scientific sites to book preferred properties near those sites rather than in downtown areas. This year, the company established global meal limits for breakfast, lunch and dinner, eliminating previous caps that differed by market. Boston Scientific's travel policy applies globally, although certain countries may have more restrictive policies. The company's total U.S.-booked air volume held steady year over year.

## 92 KIEWIT

## OMAHA, NEB.

**2015 U.S.-Booked Air Volume:** \$50 million

**Principal Online Booking Tool:** Concur Travel

**Principal Expense Supplier:** Concur Expense

**Consolidated U.S. TMC:** Travel and Transport

BTN estimates that Kiewit spent more than \$50 million from U.S. points of sale. The company reported \$9 billion in revenue and 22,000 employees in 2015, down from \$10.4 billion in revenue and 25,700 employees in 2014. Employee-owned, it has become one of the largest construction and engineering firms in North America, with a heavy presence in Canada and the United States and a district office in Australia. While it is served primarily by four Radius agencies, Kiewit is not under the official Radius contracted global program. One agency serves as the lead data aggregator, and the others feed it pre-trip and other data.

In 2015, the company refined its travel policy to convey a more consistent message from country to country while also allowing room for more local flavor. Perhaps because travel reports to HR and because some parts of the business compete for employees, sponsors and project managers have shifted their mentality to providing a good travel experience. For travelers, the company internally marketed the safety, security and comfort benefits of its travel contracts.

Kiewit's transient travel department and meetings and events department work together on strategic meetings management. The company annually holds about 500 events, ranging from 100 to more than 1,000 attendees. All meeting request forms, including detailed budget information, must be submitted through the company's SMM software, which was deployed in January 2014. Kiewit's transient booking tool also integrates with its SMM software. When a meeting is registered, it's assigned a number within Concur, so group air spend can be calculated per event.

Kiewit's SMM software also includes a calendar, providing management with event logistics and contact information. Kiewit also has been working on designing a meetings and events portal on the company's internal network for all events-related information.

## 93 VIACOM

## NEW YORK CITY

**2015 U.S.-Booked Air Volume:** \$49.3 million

**2015 Global Air Volume:** \$53.5 million

**Principal Air Suppliers:** American, Delta, United

**Principal Hotel Suppliers:** Hilton, Marriott, Starwood

**Principal Car Rental Suppliers:** Budget, Hertz

**Principal Online Booking Tool:** Concur Travel

**Principal Expense Supplier:** SAP

**Principal Card Supplier:** Citi

**Consolidated U.S. TMC:** Carlson Wagonlit Travel

Travel program globalization is underway at entertainment media company Viacom. The timing coincides with the broadest international expansion in the company's history. According to the company's fourth-quarter and full-year 2015 earnings report, it launched 21 channels in international markets last year.

Viacom put a global agency RFP out to bid in 2015. In the meantime, it consolidated its U.S. volume with Carlson Wagonlit Travel. In 2016 the company has continued its agency consolidation efforts with the goal of onboarding the rest of the Americas and Europe. Still, Viacom has been cautious about deploying a single travel policy for all markets, though it has worked to align diverse policies.

Viacom rolled out Concur Travel as its online booking tool in the United States in 2015 but continues without a designated OBT elsewhere. In that transition year, it pushed 31 percent of its United States-based air bookings through its OBT as touchless transactions. Viacom uses SAP as its expense reporting system globally.

## 94 EMERSON

## FERGUSON, MO.

**2015 U.S.-Booked Air Volume:** \$49 million

*BTN* estimates U.S.-booked air volume in 2015 dipped slightly year over year at manufacturing conglomerate Emerson. For the 12 months ending Sept. 30, 2015, the company gained \$22.3 billion in revenue, down about 9 percent from 2014. Net earnings increased 26 percent to \$2.7 billion. Emerson averaged 110,800 employees during its 2015 fiscal year, down from 115,100 the previous 12 months. The company uses Carlson Wagonlit Travel and American Express Global Business Travel for travel services throughout the world.

## 94 ITW

## GLENVIEW, ILL.

**2015 U.S.-Booked Air Volume:** \$49 million

**2015 Global Air Volume:** \$73 million

**2015 U.S. T&E:** \$120 million

**2015 Global T&E:** \$143 million

**Principal Air Suppliers:** Delta, United

**Principal Hotel Suppliers:** Hilton, InterContinental, Marriott

**Principal Car Rental Supplier:** Enterprise, Hertz, National

**Principal Online Booking Tool:** Concur Travel

**Principal Card Supplier:** American Express

**Principal Expense Supplier:** Concur Expense

**Principal Global TMC:** American Express Global Business Travel

ITW's U.S.-booked air volume decreased \$4 million in 2015, but the company expects it to increase again in 2016. Seventy-three percent of ITW's U.S.-booked air tickets in 2015 were for domestic travel. Last year, the company further consolidated its T&E platform in Asia and now offers travel services in 32 markets. In 2016, ITW is focused on closing gaps in existing markets and expanding its expense platform. The travel program uses a single global policy for its 20,000 travelers. Globally, the company uses Concur Travel as its online booking tool and Concur Expense for expense reporting. Last year, 94 percent of United States-based air bookings went through ITW's approved online tools, and 97 percent required no agent assistance. ITW uses American Express as its corporate card supplier on an individual bill, individual pay model.

## 96 AIG

## NEW YORK CITY

**2015 U.S.-Booked Air Volume:** \$47.7 million

**Consolidated U.S. TMC:** HRG

AIG revenue dropped more than 9 percent year over year to \$58.3 billion, while net income fell from \$7.5 billion in 2014 to \$2.2 billion. General operating expenses dropped from \$15.1 billion to \$12.7 billion, and U.S.-booked air volume fell, as well. Further reduction of such expenses is a corporate goal for 2016. AIG employed 66,400 people at the end of 2015, about 1,400 more than in 2014.

## 97 STRYKER

## KALAMAZOO, MICH.

**2015 U.S.-Booked Air Volume:** \$46.2 million

*BTN* estimates medical devices and equipment manufacturer Stryker's U.S.-booked air volume dropped 30 percent in 2015. Revenue totaled \$9.9 billion, a 2.8 percent increase in 2014. Stryker, which employs 26,000, implemented a global enterprise resource planning system in 2015 and merged its European and U.S. businesses under a transatlantic model. It plans to incorporate Canada in 2016. In January 2015, Stryker acquired CHG Hospital Beds, a manufacturer that operates in Canada, the United States and the United Kingdom. In September 2015, Stryker acquired Muka Metal, a Turkey-based manufacturer and marketer of hospital furniture, stretchers and other accessories. In April 2016, the firm completed the acquisition of Sage Products and Synergetics.

## 98 3M

## ST. PAUL, MINN.

**2015 U.S.-Booked Air Volume:** \$46 million

**2015 Global Air Volume:** \$70 million

**2015 U.S. T&E:** \$120 million

**2015 Global T&E:** \$220 million

**Principal Air Supplier:** Delta

# Air France



Air France continues its unprecedented investment in enhancing the customer experience. Over a half billion euros in new products and services have been introduced since June 2014. The new interiors being installed on Boeing 777s—the bulk of the long-haul fleet—add comfort in every class of service. The refurbished 777-200s feature Business, Premium Economy and Economy cabins, while the 777-300s have four cabins including La Première. Retrofits of the A330 will follow.

## >> Luxurious La Première

Air France's most spacious cabin, La Première features VIP attention from check-in to arrival. On board guests are pampered with a 6-1/2-foot-long bed with a mattress, caviar service, menus by Michelin-starred chefs and decadent desserts from Paris patisserie Lenôtre. Retrofitted 777-300s feature four elegant suites each one measuring 32 square feet with adjustable privacy curtains, a personal closet, and a 24-inch HD video screen. The La Première experience includes expedited security, access to the exclusive Paris-CDG lounge and spa, and access to business jet services to and from destinations across Europe.



## >> New Business Flat Beds

The new Business features cocoon-like privacy with seat beds that fully recline 180°. Every seat provides direct aisle access and 20% more space with just four across in a 1-2-1 configuration. To work, travelers will find an adjustable table with 25% more surface space, in-seat power, added storage and noise-reducing headphones. All Business customers enjoy SkyPriority check-in and boarding, extra baggage allowance, lounge access and gourmet dining.

## >> A Dedicated Premium Economy

Unique, fixed shell seating provides 40% more space than Economy in a dedicated cabin. Premium Economy extras include enhanced dining, a noise-reducing headset, individual power/ USB ports, additional baggage allowance, and priority check-in and boarding. The 777 retrofit gave Air France the opportunity to enhance the already popular Premium Economy seat with a softer cushion, an increased four footrest positions, and a larger tray table.

## >> More Comfort in Economy

The redesign extends to Economy, where new ergonomically-designed seats offer more legroom, in-seat power, larger screens, and larger tray tables. A new HD inflight entertainment system provides more movies and other content for travelers in all cabins to choose from. On long-haul flights, Air France Economy continues a tradition of providing exceptional value with a French touch, including complimentary beer, wine, Champagne, and spirits.

## >> An Expanding Global Network

Air France's vast network of over 180 destinations on 5 continents, industry-leading partnerships and improved Paris-Charles de Gaulle hub can take business travelers to virtually anywhere they need to go. Air France and the Paris airport authority have invested \$743 million since 2012 to streamline the connection experience by moving flights closer together, opening new pedestrian corridors, and adding traveler-friendly amenities like free Wi-Fi, children's play areas and interactive info kiosks. Paris-CDG remains Europe's largest hub in terms of connection opportunities.

Air France continues to expand its global footprint with new service to Accra, Glasgow and Tehran, and new flights between Paris-Orly and New York-JFK.

Learn more about the new products at [www.airfrance.us](http://www.airfrance.us)

**Principal Hotel Suppliers:** Hilton, Marriott  
**Principal Car Rental Supplier:** National  
**Principal Online Booking Tool:** Sabre GetThere  
**Principal Card Supplier:** Citi MasterCard  
**Principal Expense Supplier:** Oracle PeopleSoft  
**Consolidated U.S. TMC:** Carlson Wagonlit Travel

Manufacturing company 3M reduced its U.S.-booked air volume nearly one-tenth from \$51.5 million in U.S.-booked air volume in 2014. In 2015, 85 percent of U.S.-point-of-sale bookings went through GetThere, 50 percent of which required no agent assistance.

In 2015, the company began to consolidate TMC services under Carlson Wagonlit Travel and BCD Travel, which should aid data reporting and duty of care. Once the new agency structure is in place in each region, 3M will replace the GetThere booking tool, PeopleSoft expense system and SAP Travel Request with a new Concur technology platform. At year-end, 32 of the 93 countries where 3M operates had consolidated TMCs; CWT now services 3M's more than 20,000 travelers in the United States, Canada and most European countries, and BCD Travel has a strong presence in Latin America and some of Asia/Pacific. Concur will roll out in North America this fall and Latin America and Asia/Pacific will wrap up next year. Consolidation in Europe, the Middle East and Africa and any remaining countries will be finished in the first quarter of 2018.

3M also is developing its strategic meetings management program. Citi MasterCard provides corporate cards in the United States and Canada.

As of Dec. 31, 2015, 3M employed nearly 90,000 people, similar to the previous year. Revenue dropped nearly 5 percent from \$31.8 billion in 2014 to \$30.3 billion in 2015. Expenses were virtually flat, rising from \$20.3 billion in 2014 to \$20.4 billion in 2015.

## 99 LIBERTY MUTUAL

### BOSTON

**2015 U.S.-Booked Air Volume:** \$45.7 million

**2015 U.S. T&E:** \$160 million

**Principal Car Suppliers:** Enterprise, National

**Principal Online Booking Tool:** Concur Travel

**Principal Card Supplier:** US Bank

**Principal Expense Supplier:** Oracle Internet Expenses

**Consolidated U.S. agency:** BCD Travel

In 2015, Liberty Mutual added to its policy a 14-day advance-booking window, when possible, and a seven-day advance-purchase minimum for travel between Liberty offices; managers will receive notifications when employee book under the window. Liberty Mutual also now requires manager approval for employees to fly business class for flights shorter than eight hours. In 2016, the company is leveraging global spend in travel negotiations and increasing advance bookings and hotel attachment.

Liberty Mutual's 2015 U.S.-booked air volume totaled \$45.7 million, a 3 percent year-over-year increase from 2014. It's expected to remain flat for 2016. The company is the fifth-largest property and casualty insurer in the United States, based on the National Association of Insurance Commissioners data on 2015 direct written premiums. *Fortune* ranked it the 73rd-largest corporation in the United States. It operates in 30 countries and employs more than 50,000 people in more than 800 offices. In 2015, the insurer acquired Compañía de Seguros Generales Penta Security, Chile's fourth-largest property and casualty insurer, according to Liberty Mutual's 2015 annual report.

Group revenue decreased 2.8 percent to \$37.6 million in 2015, and

pre-tax operating income declined 26 percent to \$2 billion, owing to low interest rates, the strong U.S. dollar, a drop in energy prices and tumult in Venezuela, which led the company to write off its investment in Seguros Caracas De Liberty Mutual.

## 100 CATERPILLAR

### PEORIA, ILL.

**2015 U.S.-Booked Air Volume:** \$45 million

**Consolidated Global TMC:** BCD Travel

Caterpillar's 2015 U.S.-booked air volume decreased 25 percent from the previous year. Revenue for the construction and heavy equipment manufacturer declined from \$55.2 billion in 2014 to \$47 billion in 2015. Weak commodity prices and slowing economic growth in developing countries weighed on results. Of Caterpillar's sales, 41 percent came from inside the United States in 2015. Operating profit fell from \$5.3 billion in 2014 to \$3.3 billion last year. Caterpillar employed 105,700 people as of the end of 2015, down from 114,233 in 2014. About 48,000 are based in North America.

## 100 GSK

### BRENTFORD, UNITED KINGDOM

**2015 U.S.-Booked Air Volume:** \$45 million

GSK air travel emitted 102,000 tons of CO<sub>2</sub> in 2015, up from 94,000 in 2014, according to its annual report. The pharmaceutical company employed 101,255 people based in more than 150 countries. Thanks to increased monitoring, T&E's share of the company policy violations committed by employees rose from 3 percent in 2014 to 10 percent in 2015, according to the company's annual report. Of the 387 people dismissed from the company, 130 left the company because of T&E violations, the most common reason.

The global healthcare company's GSK revenue totaled GBP25.9 billion or US\$31.6 billion, in 2015, up from \$25 billion in 2014. GSK completed several acquisitions in 2015, including vaccine developer GlycoVaxyn. GSK also acquired Novartis' global vaccine business, excluding influenza vaccines, while Novartis acquired GSK's oncology business. The companies also created a consumer health joint venture. Additionally, GSK divested its portfolio of over-the-counter brands and its meningitis vaccines. The healthcare company is continuing its M&A streak in 2016. In February it acquired Bristol-Myers Squibb's HIV portfolio. It has also divested its anesthesia, thrombosis and dermatology foam businesses.

## 100 UPS

### ATLANTA

**2015 U.S.-Booked Air Volume:** \$45 million

*BTN* estimates global supply chain service UPS spent \$45 million on U.S.-booked air in 2015, earning it a place on the CT100 list for the first time in three years. As measured in carbon emissions, UPS's business travel levels were flat in 2015. Revenue also was nearly flat, increasing 0.2 percent to \$58.4 billion. As of Dec. 31, the company employed 444,000 employees, including 76,000 at the management level.

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