

BTN

BUSINESS TRAVEL NEWS

September 18, 2017

2017 CORPORATE TRAVEL

100

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BTN'S
30TH
ANNUAL
LIST
OF THE
BIGGEST
CORPORATE
TRAVEL
SPENDERS
IN THE
U.S.

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BTN's 30th Annual Corporate Travel 100

BY ELIZABETH WEST

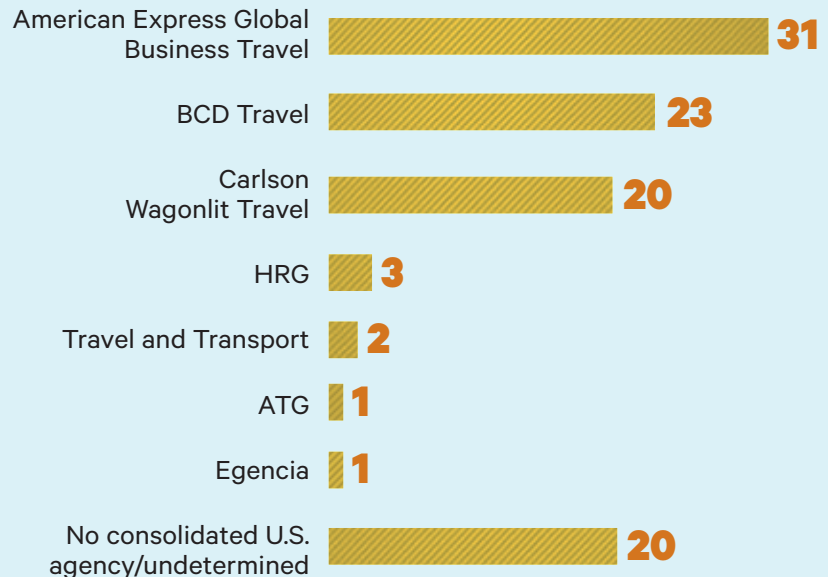
BTN's list of the 100 biggest corporate travel spenders, based on U.S.-booked air volume, is something of an industry bellwether; the numbers alone offer a big-picture view of trends not only in corporate travel spending but also in industry health and activity. Dig a little deeper and you'll find the CT 100 pointing the way toward new travel management practices as they optimize their programs.

Corporate Travel 100 companies spent less overall in 2016 than they did in 2015. In 2015, the group's U.S.-booked air travel volume totaled \$11.3 billion. In 2016, it dropped to \$11.16 billion. Based on a combination of self-reported air volume and BTN estimates, 44 of the CT 100 companies reduced U.S.-booked air spend, 45 increased it and 11 stayed the same or did not appear on last year's list.

Dollar for dollar, though, many of the most significant spend reductions came out of the top of the draw. Boeing, for example, cut approximately \$90 million in U.S.-booked air volume. That was the biggest drop in the list but perhaps not the biggest surprise. IBM provided that.

After 30 years at the top of BTN's CT 100, IBM ceded its spot to global accounting giant Deloitte. While IBM increased its number of U.S. air tickets in 2016, BTN estimates that its actual air spend dropped \$25 million. At the same time, Deloitte upped its U.S.-booked air spend enough to knock IBM to No. 2. Deloitte expects its air spend to rise another \$25 million in 2017. IBM, on the other hand, has undergone a major supplier change over the past two years, which may be paying dividends in savings. After Egencia acquired IBM's

CONSOLIDATED U.S. TMCs AMONG BTN'S CORPORATE TRAVEL 100



Prior years' versions of this data compiled both primary U.S. travel management companies and consolidated U.S. TMCs. This chart accounts only for consolidated U.S. TMCs.

preferred TMC, Orbitz for Business, IBM moved its business to Concur. IBM also is focusing its efforts on improving the traveler experience at little or no cost, a trend that is gaining among the CT 100.

It's not just the largest of the large players making waves, though. Cisco, which has hovered around No. 25 in the CT 100 rankings for the past several years, rocketed up the list to round out the top 10. Cisco acquired Jasper Technologies, CliQr Technologies and CloudLock in 2016 and completed its third major 2017 acquisition at the end of July. Dell Technologies, another growth-by-acquisition story, also was expected to dart up the ranks of the CT 100 this year. And so it did,

moving up nearly 40 places to No. 29 after folding in EMC, which was on BTN's big-spenders list in its own right before the acquisition.

ENERGY COMPANIES ARE SENDING MIXED MESSAGES

Oil, gas and natural resources companies appeared stable based on 2016 travel spend numbers, but then there was Chevron. ExxonMobil actually rose one place to No. 13, even on slightly reduced spend. Royal Dutch Shell, after falling 31 spots to No. 48 a year ago, pushed its way back to No. 36 this year with a major increase in U.S.-booked air spend. BP, which had fallen to No. 90 a year ago, landed at No. 77 this year, albeit with

Louis Magliaro, Senior Vice President & Group Publisher
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a much smaller increase in air spend. Chevron lost a lot of ground, however, falling 20 places to No. 69.

TREND SPOTTING

When it comes to best practices, there's still a clear focus on rightsizing spend to achieve business results, but companies are looking at more sophisticated ways to achieve it. One strategy emerging among big names like Accenture, IBM and Oracle is advanced data analytics. More companies are digging deeper into their data to inform procurement and supplier management strategies, but they also are using traveler data to drive traveler experience and engagement levels. Companies clearly recognize the relationship between traveler behavior and compliance and achieving program goals. There is also a strong move toward rate-shopping tools like Tripbam and Yapta among the CT 100, and several companies credit these tools with helping them realize significant savings. A number of companies also have forged agreements with ride-hailing platforms, aka Uber and Lyft, in pursuit of ground transportation savings and traveler convenience. Unsurprisingly, several companies among the CT 100 also placed renewed attention on travel risk management systems and protocols. ■

METHODOLOGY

The CT 100 is based on 2016 air tickets purchased at all U.S. points of sale for domestic or international business travel. Many organizations provided at least some information for use in their specific listings. Respondent organizations completed an online questionnaire; some provided additional information in interviews. For organizations that did not participate, BTN used industry sources, published reports and other intelligence about specific programs to provide an estimate of U.S.-booked travel spend. Estimates are noted in the listings. In the online questionnaires, BTN asked respondents to list their organizations' highest-volume suppliers and other preferred suppliers in the U.S. and other regions; their responses are included by supplier category and listed in order of volume as principal suppliers.

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Dear Global Business Partners,

We would like to start by thanking BTN for their ongoing investment in the industry, their thought leadership and investment in education. American Express is extremely excited to sponsor the 2017 edition of the Business Travel News Corporate Travel 100. Being part of

this special research report is our way to reinforce our relationship with our valued customers, but also to connect with corporate travel experts from all types of industries.

American Express' vision is to be the world's most respected service brand. Our aspiration is to be first in service, no matter the business category. We want to be where our customers are and that means being in the right place at the right time with the right offer.

To drive growth, American Express has a wide range of opportunities around the world as spending and commerce continue to migrate away from cash, and technology opens up new opportunities. We are well-positioned to use the power of our network to connect buyers and sellers in ways that drive commerce and enrich life.

To drive efficiency, staying lean and flexible is critical to our growth strategy. Keeping our operating structure highly efficient enables us to direct more resources toward investments that drive our business, things like developing new products, signing new partnerships and enhancing existing capabilities. That puts us in a better position to grow even when economic conditions are slower.

To deliver superior technology, our Digital Enterprise and Technology teams are employing an agile development model to launch new digital services and partnerships faster than ever.

We are looking forward to meeting you and accompanying you throughout your company's travel management journey.

Lisa Marks
Senior Vice President / General Manager
Global Business Development



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To the Enlightened Readers of BTN,

For companies featured in the Corporate Travel 100 issue and all of our business partners, thank you for your support of United Airlines. We place a huge value on long-term relationships and having partners we can innovate with to improve the corporate travel experience and everybody's bottom

line. Ultimately, it's about getting people to where they need to be safely, on-time with great service and at attractive prices. We do that at United.

It's been an extraordinary year of change and growth for us in the Friendly Skies. No doubt we've learned a lot and improved in so many different ways. In 2017 we've routinely finished first among our major competitors in on-time departures and arrivals, flight completion and customer satisfaction. With our Global Performance Commitment we're putting our money where our mouth is and behind United's promise of delivering the best in reliable and productive air travel.

Our highly acclaimed new web portal, **Jetstream**, launched this year for corporate travel professionals and TMC clients worldwide, and is providing the very best in online travel management and support. You can get things done fast and efficiently through Jetstream! See page 34.

We are investing Billions to improve the experience of those who manage the business of corporate travel and those who actually fly. United Polaris is redefining the international business travel experience and at our seven hubs, we're delivering a modern, world-class airport experience with new technology, terminals and amenities. Come check 'em out!

It is an exciting time to be in the travel industry, and nowhere is that more true than at United. When selecting an airline partner, we know you have many fine choices, and truly appreciate you choosing United.

Sincerely,

Dave Hilfman
Senior Vice President – Worldwide Sales
United Airlines

RANKED BY 2016 U.S.-BOOKED AIR VOLUME

	RANKING		RANKING	
\$480.5M	Deloitte	1	\$83M Nike	51
\$465M	IBM	2	\$79M GSK	52
\$300M	GE	3	\$78.8M International Monetary Fund	53
\$294.2M	PwC	4	\$78M UBS	54
\$258.5M	EY	5	\$75M Allergan	55
\$255M	Apple	6	\$74M Goldman Sachs	56
\$248M	Accenture	7	\$70M Credit Suisse	57
\$240M	McKinsey & Co.	8	\$69M L-3 Technologies	58
\$218.8M	Boeing	9	\$69M Walmart	58
\$207M	Cisco	10	\$68.3M Toyota Motor Sales U.S.A.	60
\$204.5M	Lockheed Martin	11	\$68M The Coca-Cola Co.	61
\$203M	Microsoft	12	\$68M Koch	61
\$179M	ExxonMobil	13	\$67M Honeywell	63
\$177M	The World Bank	14	\$66M Novartis	64
\$175.9M	Oracle	15	\$66M Omnicom Group	64
\$174M	KPMG U.S.	16	\$65M Verizon	66
\$168.5M	Wells Fargo	17	\$64.5M Bayer	67
\$168M	Bank of America	18	\$64.5M Marsh & McLennan Cos.	67
\$160M	Amazon	19	\$63.6M Chevron	69
\$159M	Google	20	\$63M Publicis Groupe	70
\$157M	JPMorgan Chase & Co.	21	\$61M Lilly	71
\$150M	Citigroup	22	\$60M Morgan Stanley	72
\$149.2M	Roche	23	\$58M Danaher	73
\$147.5M	Johnson & Johnson	24	\$57M P&G	74
\$137M	FedEx	25	\$56.9M Boston Scientific	75
\$135M	BCG	26	\$56.6M 21st Century Fox	76
\$135M	Siemens	26	\$55.6M BP	77
\$135M	The Walt Disney Co.	26	\$55M Cognizant	78
\$133M	Dell Technologies	29	\$54.3M Johnson Controls	79
\$131M	Hewlett Packard Enterprise	30	\$54M Amgen	80
\$131M	SAP	30	\$54M Kiewit	80
\$129M	IPG	32	\$54M Stryker	80
\$127M	Medtronic	33	\$54M Viacom	80
\$125M	Comcast	34	\$53M Epic Systems	84
\$115M	Raytheon	35	\$52M Barclays	85
\$111M	Royal Dutch Shell	36	\$52M UPS	85
\$110M	Northrop Grumman	37	\$52M WPP	85
\$104M	United Technologies	38	\$51M Aon	88
\$103M	Sanofi	39	\$50M Allstate	89
\$100.6M	Pfizer	40	\$50M Samsung	89
\$100M	Facebook	41	\$49.4M Ford Motor Co.	91
\$96M	Intel	42	\$49M ITW	92
\$94M	Abbott	43	\$47M Daimler	93
\$94M	Merck & Co.	43	\$45M Emerson	94
\$92M	General Motors	45	\$45M Nestle	94
\$92M	Time Warner	45	\$45M Salesforce	94
\$90M	The Church of Jesus Christ of Latter-Day Saints	47	\$44.8M Pepsico	97
\$86M	Abbvie	48	\$44.2M 3M	98
\$85M	UnitedHealth Group	49	\$44.1M United Nations HQ	99
\$84M	General Dynamics	50	\$43M McKesson	100

ALPHABETIZED WITH RANKING

	RANKING		RANKING
3M	98	Johnson & Johnson	24
21st Century Fox	76	Johnson Controls	79
Abbott	43	JPMorgan Chase & Co.	21
Abbvie	48	Kiewit	80
Accenture	7	Koch	61
Allergan	55	KPMG U.S.	16
Allstate	89	L-3 Technologies	58
Amazon	19	Lilly	71
Amgen	80	Lockheed Martin	11
Aon	88	Marsh & McLennan Cos.	67
Apple	6	McKesson	100
Bank of America	18	McKinsey & Co.	8
Barclays	85	Medtronic	33
Bayer	67	Merck & Co.	43
BCG	26	Microsoft	12
Boeing	9	Morgan Stanley	72
Boston Scientific	75	Nestle	94
BP	77	Nike	51
Chevron	69	Northrop Grumman	37
The Church of Jesus Christ of Latter-Day Saints	47	Novartis	64
Cisco	10	Omnicom Group	64
Citigroup	22	Oracle	15
The Coca-Cola Co.	61	P&G	74
Cognizant	78	Pepsico	97
Comcast	34	Pfizer	40
Credit Suisse	57	Publicis Groupe	70
Daimler	93	PwC	4
Danaher	73	Raytheon	35
Dell Technologies	29	Roche	23
Deloitte	1	Royal Dutch Shell	36
Emerson	94	Salesforce	94
Epic Systems	84	Samsung	89
ExxonMobil	13	Sanofi	39
EY	5	SAP	30
Facebook	41	Siemens	26
FedEx	25	Stryker	80
Ford Motor Co.	91	Time Warner	45
GE	3	Toyota Motor Sales U.S.A.	60
General Dynamics	50	UBS	54
General Motors	45	United Nations HQ	99
Goldman Sachs	56	United Technologies	38
Google	20	UnitedHealth Group	49
GSK	52	UPS	85
Hewlett Packard Enterprise	30	Verizon	66
Honeywell	63	Viacom	80
IBM	2	Walmart	58
Intel	42	The Walt Disney Co.	26
International Monetary Fund	53	Wells Fargo	17
IPG	32	The World Bank	14
ITW	92	WPP	85

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1 DELOITTE NEW YORK CITY

2016 U.S.-Booked Air Volume: \$480.5 million

2016 Global Air Volume: \$498.7 million

2016 U.S. T&E: \$1.4 billion

2016 Global T&E: \$1.6 billion

Principal Air Suppliers: American, Delta, United

Principal Hotel Suppliers: Hilton, Hyatt, Marriott

Principal Car Rental Suppliers: Avis, Budget

Principal Online Booking Tool: GetThere

Principal Card Supplier: American Express

Consolidated U.S. TMC: BCD Travel

The Deloitte U.S. Firms increased U.S.-booked air volume by more than \$5 million in 2016, which is significantly less than the growth the professional services firm projected last year. In 2017, Deloitte projects to increase its U.S.-booked air volume approximately \$25 million. During 2016, the Deloitte U.S. Firms achieved significant savings for air, lodging and ground activities through effective sourcing and demand management activities. It reached its highest-ever levels of online adoption and increased downloads of its booking app. The travel program also incorporated new managed categories for transportation network providers and trusted traveler programs.

The firm maintained its travel policy during 2016 and expects to do the same this year, though the travel policy varies by region. The Deloitte U.S. Firms continue to use BCD travel as the consolidated U.S. agency.

This year, the organization is looking to leverage its global volume, agreements and processes to improve its travel program. It aims to further increase online and app adoption. It also is working to implement an automated pre-trip rate and fare-optimization process, as well as to deploy tools for data analysis and visualization.

Sabre GetThere serves as the Deloitte U.S. Firms' online booking tool. Sixty-eight percent of U.S. air bookings went through the tool in 2016, and 80 percent of those required no agent assistance. The organization uses American Express as its corporate card supplier on an individual bill, central pay model. It uses its own internal expense reporting system customized through SAP.

2 IBM ARMONK, NY

2016 U.S.-Booked Air Volume: \$465 million

Principal Air Suppliers: American, Delta

Principal Hotel Suppliers: Hilton, Marriott

Principal Car Rental Suppliers: Avis, Hertz

Principal Online Booking Tool: Concur

Principal Card Supplier: American Express

Principal Expense Supplier: Concur

Consolidated Global TMC: Amex GBT

BTN estimates that IBM's U.S.-booked air volume decreased by \$25 million in 2016, even as the number of tickets it issued increased by 1 percent. In doing so, the technology and consulting heavyweight, with \$2 billion in global T&E last year, slipped from its position as the largest corporate buyer of U.S.-booked air travel for the first time in the 30 years that BTN has ranked the top 100.

In 2016, IBM signed a global deal to combine T&E under Concur. IBM's use of the Orbitz for Business tool came to a complete stop on Dec. 1, and by year-end, IBM had rolled out Concur in 33 countries. The company

launched Concur Travel & Expense in the U.S. in May 2017. By January 2018, it plans to roll out Concur Travel to all 99 countries where it manages travel and Concur Expense to all 112 countries where it has offices. IBM also introduced an internal social network, Travel@IBM. This year, the travel program and the company's research division delivered an intelligence tool called IBM Travel Manager to help travel teams manage contracts and traveler expenses at the business unit level. It has rolled out to business managers internally and soon will be used by IBM customers, as well.

In 2016, the company conducted internal surveys and interviews, talked with corporate peers and worked with Concur and the IBM global client group to create a policy survey that it is using to benchmark and establish policy parameters. The company is now focusing on how to improve the traveler experience for little or no cost. The travel team also worked with American Express and American Express Global Business Travel to improve its strategic approach as it renewed its card and travel agreements last year. IBM's security, HR and travel procurement teams work with American Express GBT on duty of care. Travelers also have mobile access to International SOS, iJet or the TMC.

The primary focus of the travel team now is to develop and implement a mobile program by the end of the year. Working with the same research division resources that went into IBM Travel Manager, the travel team plans to pilot a mobile app in the fourth quarter.

3 GE FAIRFIELD, CONN.

2016 U.S.-Booked Air Volume: \$300 million

2016 Global Air Volume: \$520 million

2016 U.S. T&E: \$710 million

2016 Global T&E: \$1.5 billion

Principal Air Suppliers: Delta, United, American

Principal Hotel Suppliers: Marriott, Hilton, InterContinental

Principal Car Rental Supplier: Hertz

Principal Online Booking Tool: GETRes

Principal Card Supplier: American Express

Principal Expense Supplier: Concur

Consolidated Global TMC: Carlson Wagonlit Travel

In 2016, General Electric improved data analytics and decreased U.S.-booked air spend by almost 4 percent. The manufacturing giant anticipates a 22 percent decrease in U.S.-booked air spend for 2017, down to \$404 million. In 2017, it will focus on contracts and programs and will add a strategic meetings management program. Additionally, GE will allow ride-sharing. Seventy percent of the company's U.S.-booked air volume was domestic. Eighty percent of bookings went through the GETRes booking tool. The company travel program serves about 180,000 business travelers.

4 PWC LONDON

2016 U.S.-Booked Air Volume: \$294.2 million

Consolidated Global TMC: Amex GBT

Though BTN's estimate for PwC's 2016 U.S.-booked air volume is up slightly more than \$3 million from 2015, that adds less than 1 percent to its U.S.-based air spend overall. That's a testament to the cost control practiced at PwC, where the U.S. employee base in fiscal year 2016 grew 8 percent and the global headcount during the same time frame grew 7 percent. It's also a testament to engagement in PwC's travel program. Program managers have

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reduced traveler friction and ensured productivity. The program provides traveler enrollment in TSA Precheck and in Global Entry, travel management company hours align with peak travel times and the travel program takes an omnichannel approach to accessing TMC support: telephone, online, mobile and chat. PwC has launched an internal social network to interact with travelers, which has been a game changer in answering questions as issues occur and getting candid feedback about the travel program. PwC has been a leader in traveler satisfaction by aligning with an overall corporate strategy that focuses on employee engagement and loyalty.

5 EY
LONDON

2016 U.S.-Booked Air Volume: \$258.5 million
2016 Global Air Volume: \$529.3 million
2016 U.S. T&E: \$827 million
2016 Global T&E: \$1.72 billion
Principal Airline Suppliers: Delta, United, American
Principal Hotel Suppliers: Marriott, Starwood, Hilton
Principal Car Rental Suppliers: National, Hertz
Principal Online Booking Tools: GetThere, e-Travel Management
Principal Payment Supplier: American Express
Principal Expense Supplier: Proprietary system
Consolidated U.S. TMC: Amex GBT

EY trimmed \$9 million from in its U.S.-booked air volume for the 2017 fiscal year, which ended June 30. The professional services firm has explored ways to cut travel costs, including robotics to improve advance-booking policy compliance and hotel booking compliance. This year, EY is implementing additional cost-reduction policies, including tighter restrictions on class of service allowed and advance-booking policies for internal travel. EY renewed global airline contracts last year without a bidding process. The company seeks to drive more hotel bookings through its travel management companies, for both policy management and security reasons. It launched Tripbam in the U.S. and Canada last year to cut hotel costs and this year is overhauling its lodging RFP process to give travelers more choice outside preferred hotels. EY's travel program in the U.S. is fully consolidated with American Express Business Travel, and Carlson Wagonlit Travel and HRG handle travel needs outside the U.S. GetThere is EY's preferred booking tool in the U.S., and Amadeus e-Travel Management is its primary tool outside the U.S. EY is expanding use of online booking tools worldwide and launched them in nine countries last year, including Malaysia and the United Arab Emirates.

6 APPLE
CUPERTINO, CALIF.

2016 U.S.-Booked Air Volume: \$255 million
Consolidated U.S. TMC: BCD Travel

Apple's U.S.-booked air volume declined 12.1 percent in 2016, according to a BTN estimate. Though Apple's employee count increased 15 percent in the 2016 fiscal year, which ended Sept. 24, 2016, the company cut back on air travel and rental car mileage as its emphasized "business-critical travel." Carbon emissions related to business travel declined 16 percent year over year in the fiscal year. In 2016 Apple partnered with Lyft and instructed its employees to choose it for ride-sharing. Apple works with CWT Meetings & Events and operates an Airlines Reporting Corp.-accredited Corporate Travel Department.

7 ACCENTURE
DUBLIN

2016 U.S.-Booked Air Volume: \$248 million
2016 Global Air Volume: \$520 million
2016 U.S. T&E: \$581 million
2016 Global T&E: \$1.2 billion
Principal Air Suppliers: Delta, United, American
Principal Hotel Suppliers: Marriott, Hilton, InterContinental
Principal Car Rental Suppliers: Avis, Hertz
Principal Online Booking Tool: GetThere
Principal Card Supplier: American Express
Consolidated Global TMC: Carlson Wagonlit Travel

Accenture decreased its U.S.-booked air volume and global T&E spend by 3 percent in 2016. The global management consulting and professional services company integrated Uber for Business and implemented Yapta's FarelQ and RoomIQ price-tracking systems. It also aggressively used International Air Transport Association miscellaneous charge order credits and unused tickets. The company improved client team-reporting capabilities and enhanced its time report data feed and audit/compliance process. Additionally, Accenture finalized 24/7 support for North America and approved reimbursement for Global Entry, TSA Precheck and Nexus. In 2017, it will implement mobile booking and enhanced meetings and events technology. It does not plan travel policy changes this year. It expects U.S.-booked air volume for 2017 to decrease another 3 percent to \$240 million. 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 2016.

8 MCKINSEY & CO.
LONDON

2016 U.S.-Booked Air Volume: \$240 million
Consolidated U.S. TMC: Amex GBT

Privately held management consulting giant McKinsey & Co.'s revenue increased from \$8.4 billion in 2015 to \$8.8 billion in 2016, according to a Forbes estimate, and BTN estimates McKinsey's U.S.-booked air volume increased during the same period. The company has deployed a global network of remote conferencing options, including videoconferencing installations and webconferencing systems, in an attempt to limit unnecessary travel. McKinsey operates in more than 110 locations in more than 60 countries and employs more than 20,000, including 12,000 consultants.

9 BOEING
CHICAGO

2016 U.S.-Booked Air Volume: \$218.8 million
2016 Global Air Volume: \$246.9 million
Principal Hotel Suppliers: Hilton, Marriott, InterContinental
Principal Car Rental Suppliers: Avis, Budget
Principal Online Booking Tool: Concur
Principal Card Supplier: Citi
Principal Expense Supplier: Concur

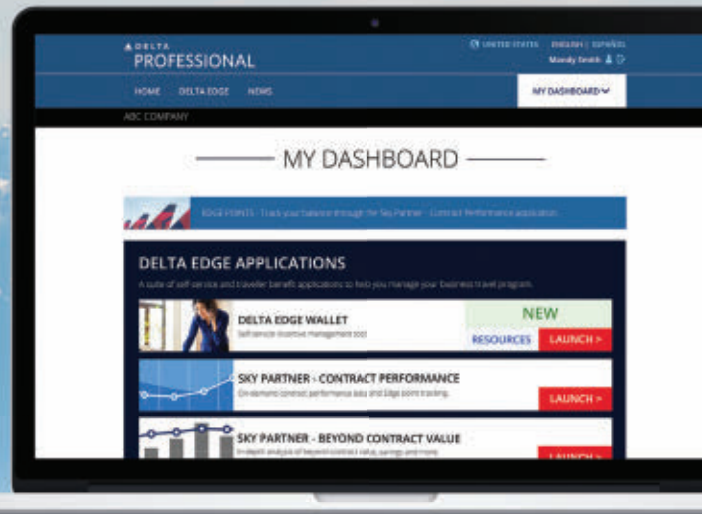
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Boeing Corporate Travel Department reduced travel costs 24 percent in 2016, including a 29 percent decrease in U.S.-booked air volume and a 25 percent decrease in global air travel spend. Of the U.S.-point-of-sale flights, 93 percent were booked through Boeing's approved online tool, and 67 percent of those were done without agent assistance. The company derived an additional \$1.2 million in savings from use of nonrefundable tickets. Boeing issued an RFP for a relocation services provider and will begin working with that supplier this year. Last year, Boeing also implemented a mid-office quality control tool for its CTD last year. The travel program also standardized global services and increased touchless transactions by 5 percent.

Boeing targets a 7 percent reduction in travel spend in 2017. As part of that goal, the aerospace and defense contractor's CTD plans further hotel rate caps. Boeing also will introduce an enterprise strategy for meetings and groups and standardize the reservation process for company executives.

Rather than charging personal travel stops incurred during bleisure trips on an employee's personal credit card, Boeing now reimburses itself through payroll deductions. It plans to increase use of touchless systems and robotics and to upgrade services available through the online booking tool, including auto-populating online receipts. The company will add a mobile app policy and support structure. Boeing will issue RFPs for a back-office tool and additional support services for its CTD. It plans no significant travel policy changes this year.

10 CISCO SAN JOSE, CALIF.

2016 U.S.-Booked Air Volume: \$207 million
Principal Air Suppliers: United, Delta, American
Principal Hotel Suppliers: Hilton, Marriott, Hyatt
Principal Car Rental Suppliers: Hertz, National, Avis
Principal Online Booking Tool: GetThere
Principal Card Supplier: American Express
Consolidated Global TMC: Amex GBT

Cisco has shifted from a reactive to a proactive approach to travel management in 2017, en route to a fully digital model focused on data from traveler behavior. The company previously implemented Web 2.0 technology to Cisco travelers—including a forum, interactive website, blog, mobile booking and online training. Using a marketplace approach to purchasing travel, Cisco developed multi-year deals with multi-brand hotel companies based not on targets and room-night commitments but rather on producing revenue in exchange for lower room rates.

11 LOCKHEED MARTIN BETHESDA, MD.

2016 U.S.-Booked Air Volume: \$204.5 million
2016 Global Air Volume: \$221.4 million
2016 U.S. T&E: \$431.4 million
2016 Global T&E: \$442.2 million
Principal Air Suppliers: American, United, Delta
Principal Hotel Suppliers: Marriott, Hilton, InterContinental, Hyatt
Principal Car Rental Suppliers: Avis/Budget Group

Principal U.S. Online Booking Tool: Concur
Primary Non-U.S. Online Booking Tool: e-Travel Management
Principal Card Supplier: U.S. Bank Visa
Principal Expense Supplier: Concur
Consolidated Global TMC: BCD Travel

Lockheed Martin completed the U.S. implementation of Concur Travel in 2016. With more insight and control over spend, U.S.-booked air volume decreased \$13.4 million, exceeding the anticipated \$5.5 million. The aerospace and defense contractor will continue to implement Concur outside the U.S. in 2017, when it also plans to review travel policy. The company expects its U.S.-booked air volume to increase in 2017 by more than \$27 million, to \$232 million. Lockheed Martin has about 40,000 travelers. The company reported \$47.2 billion in annual revenue last year. In 2016, it divested Lockheed Martin Information Systems & Global Solutions, integrated the acquisition of Sikorsky Aircraft Corp. and realigned Mission Systems & Training into a new business area named Rotary and Mission Systems.

12 MICROSOFT REDMOND, WASH.

2016 U.S.-Booked Air Volume: \$203 million
2016 Global Air Volume: \$370 million
2016 Global T&E: \$900 million
Principal Air Suppliers: Alaska, American, Delta
Principal Hotel Suppliers: Hyatt, Marriott, Westin
Principal Online Booking Tool: Concur
Principal Card Supplier: American Express
Principal Expense Supplier: Microsoft Dynamics
Consolidated Global TMC: Amex GBT

Last year, Microsoft focused heavily on technology development, data aggregation and launching the Roadmap app. The team created a Microsoft Azure data lake with 11 data sources to gain greater insight into traveler behavior and to better share dashboards with suppliers. These dashboards encompass contract utilization, account management and spend trends. Microsoft employees primarily use Concur for booking in the U.S. and Asia while utilizing Amadeus e-Travel Management in EMEA. Microsoft continues to collaborate with travel tech startup Tripism, a social review and traveler support tool. Globally, the company's travel program serves 75,000 travelers.

13 EXXONMOBIL IRVING, TEXAS

2016 U.S.-Booked Air Volume: \$179 million
Consolidated Global TMC: Carlson Wagonlit Travel
 As weak oil pricing persisted in 2016, oil and gas giant ExxonMobil cut its selling, general and administrative expenses by more than 6 percent, or almost \$1 billion, for the year, continuing the 9 percent decrease in 2015. BTN estimates the company in 2016 reduced its U.S.-booked air spend by almost 4 percent year over year. Revenue decreased 16 percent year over year to \$226.1 billion, while net income fell 51 percent to \$7.8 billion. The company employed 71,100 people at the end of 2016, down from 73,500 one year prior.



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14 THE WORLD BANK WASHINGTON, D.C.

2016 U.S.-Booked Air Volume: \$177 million
2016 Global Air Volume: \$255.7 million
Principal Global Air Suppliers: United/Lufthansa JV, Delta/Air France-KLM JV, Qatar Airways
Principal Hotel Suppliers: Independent, Marriott
Principal Online Booking Tools: e-Travel Management, GetThere
Principal Card Supplier: BMO MasterCard Diners Club
Principal Expense Supplier: SAP
Consolidated U.S. TMC: Amex GBT

The World Bank concluded the first phase of an RFP process to consolidate global travel management companies in 2016. Travel for 69 of 180 countries was consolidated under American Express Global Business Travel, BCD Travel, HRG/Rennies Travel in South Africa and SOTC Travel Services in India. This year, the organization will stabilize travel under those TMCs and implement the second phase of its RFP process to cover an additional 85 countries. The World Bank also will initiate an RFP for a North America TMC. U.S.-booked air volume declined about 4 percent in 2016, down \$8 million. It expects a \$7 million decline this year. Ninety-eight percent of U.S.-point-of-sale bookings were for international travel. Just 3 percent of U.S.-booked air spend went through preferred online tools. The bank has a single travel policy globally. The World Bank is made up of 188 member countries. The organization's goal is to provide financial and technical assistance to developing countries to reduce poverty and support sustainable development.

15 ORACLE REDWOOD SHORES, CALIF.

2016 U.S.-Booked Air Volume: \$175.9 million
Principal Online Booking Tool: GetThere
Principal Card Supplier: American Express
Principal Expense Supplier: Oracle Internet Expenses
Consolidated Global TMC: Carlson Wagonlit Travel

Oracle reduced its U.S.-point-of-sale air spend by \$37 million in 2016. It renegotiated airline contracts and improved compliance to its lowest logical airfare policies. It also worked toward dynamic pricing hotel agreements for certain brands and started a data-consolidation project. One of Oracle's goals for 2017 is to find solutions to help travelers be more productive and drive satisfaction with all parts of the managed travel program. Revenue for the fiscal year ending May 31, 2017, rose 3 percent from the previous year to \$10.9 billion. At the close of its fiscal year, Oracle employed 136,000 full time, the same number as one year ago.

16 KPMG U.S. NEW YORK CITY

2016 U.S.-Booked Air Volume: \$174 million
2016 Global Air Volume: \$189 million
2016 U.S. T&E: \$458 million
2016 Global T&E: \$470 million
Principal Air Suppliers: American, Delta, United, Southwest
Principal Hotel Suppliers: Marriott, Hilton, Starwood

Principal Car Rental Suppliers: Avis, Hertz
Principal Online Booking Tool: GetThere
Principal Card Supplier: BMO MasterCard Diners Club
Principal Expense Supplier: SAP
Consolidated U.S. TMC: Amex GBT

In 2016, KPMG implemented a new travel strategy, led by Raquel Hefferan, who joined the company in January 2016 as director of procurement and travel operations. Goals for 2017 include refreshing the travel policy and implementing a mobile strategy. KPMG's U.S. T&E spend increased 38 percent last year, and global T&E for the Big Four accounting and professional services firm increased 5 percent while U.S.-booked air volume increased 3 percent. For 2017, the company anticipates an air spend of \$177 million, reflecting a 2 percent increase over last year. KPMG uses SAP as its primary expense supplier, customizing the tool internally. The company reported \$86 billion in annual revenue for fiscal year 2016.

17 WELLS FARGO SAN FRANCISCO

2016 U.S.-Booked Air Volume: \$168.5 million
2016 Global Air Volume: \$322.5 million
Principal Air Suppliers: American, Delta, United
Principal Hotel Suppliers: Hilton, Marriott, Starwood
Principal Car Rental Suppliers: Hertz, Enterprise
Principal Online Booking Tool: Concur
Principal Card Supplier: American Express
Principal Expense Supplier: Concur
Consolidated Global TMC: HRG

Wells Fargo improved compliance for air and hotel bookings in 2016 and increased the percentage of tickets purchased 14 days in advance. Ninety-five percent of respondents to an internal survey were satisfied or better with the travel management company. TMC services exceeded expectations for 86 percent of respondents. U.S.-booked air spend declined 4 percent in 2016, and the company anticipates an additional reduction of just over 8 percent for 2017. Wells Fargo continues to contain travel costs in 2017 as part of a companywide cost-savings initiative. The company will implement a global compliance process across all business units, requiring pre-trip approval for high-cost international travel. Travelers also will need pre-trip authorization for noncompliant air and hotel bookings. Additionally, Wells Fargo will initiate an RFP for a global airline partner.

18 BANK OF AMERICA CHARLOTTE, N.C.

2016 U.S.-Booked Air Volume: \$168 million
Consolidated U.S. TMC: Amex GBT

BTN estimates Bank of America trimmed its U.S.-booked air volume 6.7 percent year over year to \$168 million in 2016 as the financial services giant reported its second-most profitable year in its history. It has been boosting its use of videoconferencing, which has cut down on travel expenses. The bank reported revenue of \$83.7 billion for the year, up from \$83 billion the prior year, and a net income of \$17.9 billion. Bank of America reported 208,000 full-time employees as of the end of 2016, down from 213,000 the prior year, and it operates in all U.S. states and more than 35 countries.




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Southwest continues to separate itself from the pack when it comes to doing things differently because it and its 55,000 employees focus on Customer Service. Corporations will find simple contracts and collaborative solutions for their travel programs. Southwest's point-to-point network, flying an all Boeing 737 fleet, means travelers won't be stuck on a small regional jet.

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>> EXPANDING ROUTES

For its California travelers and communities served, Southwest announced a substantial investment as it extended its bookable flight schedule through June 1, 2018. Carrying more passengers to, from, and within the great state of California than any other carrier,³ Southwest is thanking its loyal Golden State Customers with even more flights including nearly 20 new nonstop routes and increasing frequency to 27 existing routes, as well as opening new international gateways.

At over 25,000 passengers per day within California,³ we're excited to tout that Southwest also carries the most passengers nonstop to and from California.⁴

>> INVESTING IN NEW PLANES, TECHNOLOGY

Starting in October, Southwest will integrate the Boeing 737 MAX 8 planes into its fleet. Interiors on the new aircraft will include adjustable headrests, the widest economy seat in the 737 market and more personal space. Also in October, 100 percent of its fleet will be Wi-Fi equipped, meaning travelers can remain connected from gate to gate.

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1 As long as flight is changed and cancelled 10 minutes prior to scheduled departure, fare differences may apply; 2 First and second checked bags, size and weight limitations apply; 3 & 4 Source: US DOT O&D Passenger Survey, YE 1Q 2017; 4 WN totals from internal records; 5 15 percent promo code savings valid for domestic and San Juan, Puerto Rico one-way or round trip Anytime and Business Select® fares booked during the valid travel dates listed below and is applied before taxes and fees. Savings is reflected in the price when entering the multiuse code (SAVE15 in the Promo Code box on swabiz.com). This discount is only available through swabiz.com by logging in with your Company ID number; Discount is valid on new reservations only and purchase must be made starting August 15, 2017 and prior to 11:59 pm for the respective time zone of the originating city on November 15, 2017 for travel August 15, 2017 - November 15, 2017; Valid for Southwest Airlines® domestic and San Juan, Puerto Rico scheduled flights only; Discount will apply only on the valid travel dates. If one direction of the trip is outside the valid dates and one is within the valid travel dates, only the portion of travel falling within the valid travel dates listed above will be discounted; Changes made to the itinerary after purchase will eliminate qualifications for this promotion. The discount is only valid with the provided Promotion Code and is not combinable with other Promotion Codes or fares; Discount is not valid on reservations made using Rapid Rewards® points; Discount is not valid on Group Travel or Southwest Vacations®; No cash value.

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19 AMAZON SEATTLE

2016 U.S.-Booked Air Volume: \$160 million

2016 Global Air Volume: \$216 million

Consolidated Global TMC: Carlson Wagonlit Travel

Online retailer Amazon increased its global air volume 38 percent in 2016, according to BTN's estimate. This follows an 18 percent increase the prior year. The travel program has grown at the same time the company has expanded rapidly. In 2015, Amazon topped \$100 billion in sales for the first time, and in 2016 it had net sales of \$136 billion. The company employed more than 341,000 full- and part-time employees as of Dec. 31, 2016.

20 GOOGLE MOUNTAIN VIEW, CALIF.

2016 U.S.-Booked Air Volume: \$159 million

Consolidated Global TMC: Carlson Wagonlit Travel

Google's U.S.-booked air volume increased 13.6 percent year over year to \$159 million. The tech giant's revenue has continued to grow, as parent company Alphabet reported \$90.3 billion for 2016, up more than 20 percent compared with the previous year. Alphabet reported more than 72,000 employees at the end of 2016. For nearly a decade, Google has been a pioneer in the open booking approach, in which travelers get a budget for their itineraries, arrange travel and, if they come in under budget, reserve the difference for future trips. Even so, Google has consolidated its program globally through Carlson Wagonlit Travel and maintains preferred supplier perks and upgrades that employees can bid on with those surplus credits.

21 JPMORGAN CHASE & CO. NEW YORK CITY

2016 U.S.-Booked Air Volume: \$157 million

2016 Global Air Volume: \$305 million

2016 U.S. T&E: \$430 million

2016 Global T&E: \$730 million

Principal Air Suppliers: American, Delta, United, British Airways, Cathay Pacific

Principal Hotel Suppliers: Hilton, Marriott, Starwood, Hyatt

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

Principal Online Booking Tool: GetThere

Principal Card Supplier: JPMorgan Chase

Principal Expense Supplier: Concur

Consolidated/Primary Global TMC: Carlson Wagonlit Travel

JPMorgan Chase's U.S.-booked air volume in 2016 increased 3 percent from \$153 million the previous year. The bank's 2016 U.S. T&E also increased, by 23 percent year over year. Last year, JPMorgan Chase maintained a rigorous expense management process. It plans to consolidate agency call centers by the end of the year. Poland will handle EMEA, Costa Rica will cover the U.S. and Mexico will cover Latin America. JPMorgan Chase's 2016 net revenue totaled \$95.7 billion, up 2 percent year over year. Net income rose 1 percent to \$24.7 billion. The bank employed 243,355 people in 2016, of which more than 167,000 were based in the U.S.

In 2016, JPMorgan decided to raise the minimum wage based on location to between \$12 and \$16.50, impacting 18,000 employees.

22 CITI NEW YORK CITY

2016 U.S.-Booked Air Volume: \$150 million

Consolidated U.S. TMC: Carlson Wagonlit Travel

Citi's 2016 U.S.-booked air volume fell about 5 percent, according to BTN's estimate. Meanwhile, revenue declined 2 percent from 2015, and employees at the end of 2016 declined 11,000 to 220,000. In 2016, Citi avoided 6,791 metric tons of carbon dioxide and reduced its greenhouse gas emissions by 28 percent toward the company's 2020 goal. Citi recorded 135,735 metric tons of carbon dioxide equivalent from air travel last year, up 23 percent from 2015. The company also reported that rail travel generated 2,125 metric tons, an increase of more than 33 percent. The company encourages employees to use video- and webconferencing whenever possible rather than traveling. When travel is unavoidable, the company asks employees to group trips to manage costs, and it offers employees the option of train travel whenever feasible. In 2015, Citi began to measure its travel suppliers and those in other categories by sustainability and social performance goals. The company plans to put in place related policies and training by 2018.

23 ROCHE BASEL, SWITZERLAND

2016 U.S.-Booked Air Volume: \$149.2 million

2016 Global Air Volume: \$298 million

2016 U.S. T&E: \$257 million

2016 Global T&E: \$489 million

Principal Air Suppliers: United, Lufthansa, Swiss International Airlines, British Airways

Principal Hotel Suppliers: Marriott, Hilton, Starwood

Principal Car Rental Suppliers: Avis, National

Principal Online Booking Tool: GetThere

Principal Card Supplier: Citi

Principal U.S. Expense Supplier: Concur

Consolidated U.S. TMC: BCD Travel

In 2016, Roche implemented a traveler-engagement plan and moved toward a corporate card mandate in the U.S. The pharmaceutical, medical and healthcare company initiated an RFP for data consolidation and analytics. It will roll that out this year. U.S.-booked air volume declined 1 percent in 2016, but the company expects to return to its 2015 level in 2017. Global air volume declined 3 percent in 2016.

In the U.S., the company has consolidated with travel management company BCD Travel, which handled 95 percent of Roche's U.S.-booked air spend in 2016. Roche's primary TMC outside the U.S. is HRG. Roche uses Concur and another internal SAP expense solutions for expense reporting globally. Last year, it achieved a 71 percent online booking rate using Sabre's GetThere in the U.S., an increase of 5 percent over 2015. Roche also uses GetThere in Latin America and Singapore. Globally, travelers use multiple booking systems. The company uses a central bill, central pay system.

Roche plans to start consolidating global systems and suppliers this year. It plans to update the duty of care section of its travel policy, address shared travel services and add Wi-Fi reimbursement language.



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24 JOHNSON & JOHNSON NEW BRUNSWICK, N.J.

2016 U.S.-Booked Air Volume: \$147.5 million

Principal Air Suppliers: United, Delta

Principal Hotel Suppliers: Marriott, Hilton, Hyatt

Principal Car Rental Suppliers: Avis/Budget

Principal Online Booking Tool: Concur

Principal Card Supplier: American Express

Principal Expense Supplier: Concur

Consolidated Global TMC: Amex GBT

Johnson & Johnson continued its global T&E migration to Concur in 2016. It rolled out Concur's online booking tool to over 20 more countries. Last year, the multinational consumer goods, medical device and pharmaceutical company increased its advanced-air booking requirement from 14 to 21 days and modified thresholds for lowest logical fares for both domestic and international flights. Across all operating companies, it rolled out a pre-trip approval tool and provided a list of cost-savings options from procurement to help them achieve their targets. The initiatives helped drive a 10 percent reduction in travel and meetings spend. For its top 20 air travel city pairs, the company spent 23 percent less than industry benchmarks for business class and 7 percent less for economy. Negotiated rates for preferred properties in the global hotel program were 9 percent lower than industry benchmarks, and 74 percent of lodging costs were covered by negotiated discounts and rates at preferred chains.

Johnson & Johnson plans to expand the Concur online booking tool to another 40 countries by year-end. The company plans a global travel management program for nonemployees to aid policy and supplier compliance. Johnson & Johnson also will look into content consolidators and re-booking tools and is changing its travel policy to allow ride-sharing. The company decreased its U.S.-booked air spend by 19 percent in 2016 and expects compliance and company directives to reduce it by an additional 8 percent this year to \$145 million.

25 FEDEX MEMPHIS

2016 U.S.-Booked Air Volume: \$137 million

Consolidated U.S. TMC: BCD Travel

U.S.-booked air spend at global delivery services firm FedEx increased sharply in calendar year 2016 amid increasing sales and travel activity and the €4.4 billion acquisition of European competitor TNT Express in May 2016. Revenue for FedEx's fiscal year 2017, which ended May 31, 2017, increased 20 percent year over year to \$60.3 billion. Operating income increased 64 percent to \$5 billion, and operating expenses increased 17 percent to \$55.3 billion. In its 2016 fiscal year, the company generated 63,944 metric tons of carbon dioxide equivalent via air travel and rental car use. That figure does not include TNT Express emissions. FedEx's fiscal year 2015 business travel emissions, not including rental car use, were 50,897 metric tons. The integration of TNT Express has increased FedEx travel volume. FedEx had more than 400,000 employees in May 2017, up from 323,000 one year prior.

26 BCG BOSTON

2016 U.S.-Booked Air Volume: \$135 million

Consolidated U.S. TMC: Amex GBT

Management consulting firm BCG upped travel spending in 2016 as revenue and headcount increased. That includes a \$22 million increase in U.S.-booked air volume to a BTN-estimated \$135 million. The firm reported global sales of \$5.6 billion in 2016, up from \$5 billion the prior year. BCG reported more than 14,000 employees in 2016, an increase of 2,000. The firm has 85 offices in 48 countries.

26 SIEMENS MUNICH

2016 U.S.-Booked Air Volume: \$135 million

Principal Car Rental Suppliers: Hertz, Europcar

Consolidated U.S. TMC: BCD Travel

German industrial manufacturing conglomerate Siemens increased air spending from the U.S. point of sale in its 2016 fiscal year, which ended Sept. 30, 2016, according to a BTN estimate. In September 2016, it rolled out a new global travel policy framework to all locations and required the development of country-specific policies that both fit the framework and included adjustments to fit local regulations. For example, the global policy framework eliminates pre-trip approval requirements. Local regulations in the U.S. have additionally allowed Siemens to eliminate expense receipt requirements for airfare, car rental, any charge under \$25 and, if the corporate card is used, any item between \$25 and \$75. Receipt requirements will differ in other regions.

The policy framework also encourages the concept of "best practice" booking, enabling travelers and managers to consider bookings based on specific travel patterns, preferred partners and the business purpose of the trip. A monthly scorecard in the U.S. shows how often an individual traveler or a business has deviated from best practice and reports that information up to senior executives. As part of its E2E Travel@Siemens technology platform, Siemens plans to standardize and integrate travel booking and expense reimbursement on the Concur platform in fiscal year 2018.

Siemens reported that its fiscal year 2016 air and rail travel and rental car use generated 380,000 metric tons of carbon dioxide equivalent emissions, up from 378,000 in 2015. The company's fiscal year 2016 revenue increased 5.2 percent to €79.6 billion. On Sept. 30, 2016, Siemens had about 351,000 employees, up from 348,000 one year prior.

26 THE WALT DISNEY CO. BURBANK, CALIF.

2016 U.S.-Booked Air Volume: \$135 million

Principal Card Supplier: Citi Visa

Consolidated U.S. TMC: HRG

In 2016, The Walt Disney Co. launched global projects to assess business traveler needs and evaluate vendors and suppliers. The company additionally focused on increasing online booking adoption globally. U.S.-booked air volume dropped \$7 million in 2016 following a 2015 increase of \$6 million. BCD Travel and HRG are The Walt Disney Co.'s primary travel management companies outside the U.S. The company recorded \$55.6 billion in revenue in 2016.

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29 DELL TECHNOLOGIES ROUND ROCK, TEXAS

2016 U.S.-Booked Air Volume: \$133 million
Consolidated Global TMC: Amex GBT

Information technology firm Dell Technologies formed after Dell Inc. purchased EMC Corp. in September 2016 for \$67 billion. BTN's U.S.-booked air volume estimate comprises all calendar year 2016 activity for Dell and EMC. Both companies had used American Express Global Business Travel for global travel management services.

Dell Technologies' fiscal year 2017 ended Feb. 3, 2017. During those 12 months, the company reported, Dell Inc. and EMC air travel generated about 161,000 metric tons of carbon dioxide equivalent. That figure is down from 165,100 metric tons in the previous fiscal year. The older number included rail emissions. The companies reported 167,500 metric tons of air- and rail-related emissions for fiscal year 2015.

Dell Technologies' fiscal year 2017 revenue increased 21 percent to \$61.6 billion. Its operating loss during the same period increased from \$514 million to nearly \$3.3 billion. The combined company employed about 138,000 at the end of its fiscal year 2017.

In recent years, Dell Inc. had deployed rate-shopping tools for hotel and air and altered its travel policy to globalize daily meal limits and changed the dollar value for which it required receipts for expense requirement.

About \$2.2 million of Dell Technologies' fiscal year 2017 travel spend was dedicated to CEO Michael Dell's private air travel. Dell Technologies' policy requires him to fly privately. Dell himself owns the jet, and Dell Technologies reimburses him for business travel but not personal flights.

30 HEWLETT PACKARD ENTERPRISE PALO ALTO, CALIF.

2016 U.S.-Booked Air Volume: \$131 million
Principal Air Suppliers: United, American, Delta
Principal Hotel Suppliers: Marriott, Hilton
Principal Car Rental Suppliers: Avis, Budget
Principal Online Booking Tool: Concur
Principal Card Supplier: American Express, Citi
Principal Expense Supplier: Proprietary tool
Consolidated Global TMC: Carlson Wagonlit Travel

Hewlett Packard Enterprise made significant policy changes focused on cost savings in 2016. The company cut down its premium traveler list, implemented ride-sharing and eliminated black car and taxi use. HPE exceeded savings targets associated with Cvent's online events management software and introduced an automated dashboard for travelers. U.S.-booked air volume decreased 17 percent.

For 2017, HPE plans to drive compliance with its strategic meetings management program and implement a corporate card program with Citi. The travel program also will support some HPE restructuring. HPE spun off Enterprise Services and merged it with CSC in April to create DXC Technology. And Micro Focus' acquisition of HPE's software segment is expected to close this year. The transactions follow Hewlett-Packard's 2015 split into Hewlett Packard Enterprise and HP Inc.

For HPE, 83 percent of air spend booked in the U.S. went through approved online tools in 2016. Last year, 59 percent of U.S.-booked

air volume was for domestic travel. HPE has 90,000 travelers, and the company reported \$50 billion in revenue for 2016.

30 SAP WALLDORF, GERMANY

2016 U.S.-Booked Air Volume: \$131 million
Consolidated U.S. TMC: BCD Travel

Enterprise software giant SAP's travel spending declined amid new restrictions in 2015. Yet, U.S.-booked air spending reversed course and increased in 2016, according to a BTN estimate. Nevertheless, travel and the emissions it generates remains a key focus of SAP. In 2015, the company began charging an internal fee on air travel in nine countries for emission offsets. In 2016, the first full year of the program, that offset resulted in a compensation of 90 kilotons of carbon dioxide equivalent, up from 35 kilotons from the second half of 2015. SAP owns online booking and expense reporting technology provider Concur and in 2016 acquired travel search aggregator Hipmunk. SAP had 84,200 full-time-equivalent employees at the end of 2016, up from 77,000 one year earlier. Revenue increased to €22.1 billion, up about 6 percent from 2015.

32 IPG NEW YORK CITY

2016 U.S.-Booked Air Volume: \$129 million

IPG revenue increased 3.1 percent to \$7.85 billion 2016, owing to revenue growth from existing clients and net new business wins, according to its annual report. Operating income also increased 7.7 percent to \$632.5 million. Last year, IPG acquired seven companies in China, the U.S., and the U.K. Headcount increased to 49,800; 19,900 of those were based in the U.S. BTN estimates IPG's 2016 U.S.-booked air volume to be \$133 million, a decrease from 2015.

33 MEDTRONIC DUBLIN, IRELAND

2016 U.S.-Booked Air Volume: \$127 million
2016 Global Air Volume: \$170 million
2016 U.S. T&E: \$275 million
2016 Global T&E: \$390 million

Principal Air Suppliers: Delta, United, American
Principal Hotel Suppliers: Marriott, Hilton, Hyatt
Principal Car Rental Suppliers: Enterprise, Avis
Principal Online Booking Tool: GetThere
Principal Card Supplier: American Express
Principal Expense Supplier: adSOFT Expense Express
Consolidated U.S. TMC: Amex GBT

Medtronic consolidated travel policies in 2016 to include Covidien, which it acquired in 2015. It used the travel program's larger size to improve deals with suppliers. Global T&E spend decreased 16 percent from \$466.6 million in 2015, even as global air volume increased 9 percent. U.S. T&E and air spend showed a similar pattern. Just under 40 percent of the company's U.S.-booked air spend

is international. This year, the medical technology firm and device manufacturer plans to combine its two travel policies, one of which covers 80 percent of travel spend. American Express Global Business Travel handled 70 percent of Medtronic's bookings outside the U.S. The company anticipates U.S.-booked airfare to decline 20 percent in 2017 to \$100 million. Medtronic reported \$28.8 billion in revenue for 2016 and \$3.5 billion in net earnings.

34 COMCAST PHILADELPHIA

2016 U.S.-Booked Air Volume: \$125 million
Consolidated U.S. TMC: BCD Travel

Media and entertainment conglomerate Comcast, owner of NBC Universal, increased its U.S.-booked air volume in 2016, according to a BTN estimate. Last year, Comcast completed its \$3.8 billion acquisition of DreamWorks Animation. Revenue for the year increased, 8 percent to \$80.4 billion, while operating income increased 5.4 percent to \$16.9 billion. Operating and administrative expenditures increased 9.8 percent to \$23.4 billion.

35 RAYTHEON CAMBRIDGE, MASS.

2016 U.S.-Booked Air Volume: \$115 million
Consolidated Global TMC: BCD Travel

Defense contractor Raytheon's U.S.-booked air spending increased slightly in 2016, according to a BTN estimate. Revenue increased 3.5 percent to \$24.1 billion, and operating expenses increased 2.9 percent to \$20.8 billion. Raytheon has pursued remote conferencing options to limit air travel, including a global videoconferencing service and an integrated Web-based system. For 2015, the company reported 75,555 metric tons of carbon dioxide equivalent due to air travel booked through its travel agency, BCD Travel. Employees flew 16 percent more miles in 2015 than they had in 2014. BCD Travel has served as Raytheon's consolidated travel management company since 2007. At year-end, the company employed 63,000, up from 61,000 in 2015.

36 ROYAL DUTCH SHELL THE HAGUE, NETHERLANDS

2016 U.S.-Booked Air Volume: \$111 million
Consolidated U.S. TMC: Carlson Wagonlit Travel

Global oil and gas giant Royal Dutch Shell's U.S.-booked air spending jumped significantly in 2016. It closed the £47 billion acquisition of British oil and gas company BG Group in February 2016. Shell reported 400,000 metric tons of carbon dioxide equivalent emissions related to air travel in 2016, up from 310,000 in 2015. 2016 revenue decreased nearly 12 percent from 2015 to \$233.6 billion, though net income increased from \$2.2 billion to \$4.8 billion. In the U.S., the company has worked with Carlson Wagonlit Travel to analyze the effect of advance-purchasing behavior on Shell air spend. It employed 92,000 at the end of 2016, down from 93,000 the year before.

37 NORTHROP GRUMMAN FALLS CHURCH, VA.

2016 U.S.-Booked Air Volume: \$110 million
Principal Air Suppliers: American, Delta, United
Principal Hotel Suppliers: Hilton, InterContinental, Marriott
Principal Car Rental Suppliers: Avis, Budget
Principal Card Supplier: JPMorgan Chase Visa
Principal Online Booking Tool: Concur
Principal Expense Supplier: Concur
Consolidated/Primary Global TMC: BCD Travel

According to BTN's estimate, Northrop Grumman's 2016 U.S.-booked air volume increased 3 percent year over year to \$110 million. The defense contractor and global security company's sales revenue increased 4 percent year over year by \$982 million, owing to higher sales in both its aerospace systems and missions systems businesses. Operating income also increased 4 percent, owing to a \$137 million reduction in unallocated corporate expenses and to higher sales volume. Operating costs increased 2 percent to \$21.3 billion. At the end of 2016, Northrop Grumman's backlog, an indicator of demand, totaled \$45.3 billion, a 26 percent year-over-year increase, of which \$18.3 billion is expected to turn into 2017 sales revenue. The company employed 67,000 at the end of 2016, up 2,000 employees from the previous year.

38 UNITED TECHNOLOGIES FARMINGTON, CONN.

2016 U.S.-Booked Air Volume: \$104 million
Consolidated Global TMC: Amex GBT

Manufacturing and aerospace conglomerate United Technologies Corp. in 2016 spent about the same as it did in 2015 on U.S.-booked air travel, according to a BTN estimate. Considering the November 2015 sale to Lockheed Martin of the 16,000-employee subsidiary Sikorsky Aircraft Corp., United Technologies' flat spend likely reflects increased activity. 2016 sales for UTC—the parent company of Pratt & Whitney aircraft engines, Otis elevators and Carrier HVAC and refrigeration systems—increased 2 percent year over year \$57.2 billion. Operating income increased 12 percent to about \$8.2 billion. In 2015, it restricted business class to flights of at least 12 hours. By 2020, UTC aims to reduce carbon emissions generated by business travel by 3 percent a year, using a 2015 baseline. In 2015, business air travel and car rental use generated 109,900 metric tons of carbon dioxide equivalent. At the end of 2016, UTC employed 201,600, up from the 197,200 it employed at the end 2015 after the Sikorsky sale.

39 SANOFI PARIS

2016 U.S.-Booked Air Volume: \$103 million
Consolidated Global TMC: Amex GBT

U.S.-booked air spend for pharmaceutical giant Sanofi increased last year from 2015, according to a BTN estimate. 2016 revenue declined



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0.7 percent to €33.8 billion, though it increased 1.2 percent in constant currency terms. Sanofi recorded 110,259 metric tons of carbon dioxide equivalent from air, rail, hotel and rental car in 2016. That figure increased from 101,809 metric tons in 2015. The company encourages eco-friendly transportation and corporate meetings that are less resource intensive. In 2016, Sanofi conducted RFPs for air, hotel, car rental and ground transportation suppliers. The company had about 106,900 employees at the end of 2016, down from about 109,100 one year earlier.

40 PFIZER NEW YORK CITY

2016 U.S.-Booked Air Volume: \$100.6 million

2016 Global Air Volume: \$221.6 million

2016 U.S. T&E: \$252.2 million

2016 Global T&E: \$536.9 million

Principal Air Suppliers: United, Delta, American

Principal Hotel Suppliers: Hilton, Marriott, Hyatt

Principal Car Rental Suppliers: Avis, Budget

Principal Online Booking Tool: Concur

Principal Card Supplier: American Express

Principal Expense Supplier: Concur

Consolidated Global TMC: BCD Travel

Last year, Pfizer significantly improved online booking adoption and advance ticket purchasing patterns. U.S.-originating air volume increased 25 percent and global air volume increased 5 percent. Just under one-third of U.S.-booked air volume was domestic. In 2017, the pharmaceutical company will use metrics to promote more efficient travel behaviors. The company expects U.S.-booked air volume to remain flat. Last year, 80 percent of U.S.-booked air went through Concur Travel, which has been Pfizer's global booking tool since 2014. The company did not make any major policy tweaks in 2016 and doesn't expect any for 2017. It reported \$53 billion in revenue for 2016.

41 FACEBOOK MENLO PARK, CALIF.

2016 U.S.-Booked Air Volume: \$100 million

According to BTN's estimate, Facebook's U.S.-booked air volume increased 28 percent in 2016. Facebook—which owns Instagram, WhatsApp and virtual reality technology Oculus—increased revenue 54 percent to \$27.6 billion, primarily owing to an increase in newsfeed ads revenue, according to its annual report. Advertising sales account for 97 percent of the social network's revenue. Facebook's 2016 expenses totaled \$15.2 billion, up 30 percent from the previous year. At the end of the year, it employed 17,048, a 34 percent year-over-year increase.

42 INTEL SANTA CLARA, CALIF.

2016 U.S.-Booked Air Volume: \$96 million

2016 Global Air Volume: \$173 million

2016 U.S. T&E: \$148 million

2016 Global T&E: \$255 million

Intel increased its U.S.-booked air volume by 9 percent in 2016, up from \$79.2 million in 2015. Global air volume increased 19 percent. In 2016, Intel had 51,551 business travelers, an increase of 5,051 from the previous year. In the first quarter of 2016, Intel acquired Altera, a manufacturer of programmable electronics, and it completed the subsequent restructuring in the second quarter of this year, closing several facilities and reducing its global headcount by 15,000. That reduction saved \$1.6 billion, according to Intel's 2016 annual report. The company expects to spend \$86.7 million on U.S.-booked air volume in 2017. Last year, Intel consolidated its preferred hotel program in 72 countries and sustained customer satisfaction at 91 percent. In 2017, the travel program will enhance the travel experience and increase the use of preferred suppliers. American Express Global Business Travel is its primary travel management company globally.

43 ABBOTT ABBOTT PARK, ILL.

2016 U.S.-Booked Air Volume: \$94 million

Principal Online Booking Tool: Concur

Principal Card Supplier: American Express

Principal Expense Supplier: Concur

Consolidated U.S. TMC: Amex GBT

Global pharmaceutical and healthcare giant Abbott cut its U.S.-booked air volume to \$94 million in 2016, according to a BTN estimate, after spending \$102 million the year prior. Though net sales increased to \$20.9 billion in 2016, compared with \$20.4 billion in 2015, the company also pared back its selling and G&A expenses last year, including travel. Abbott uses Concur for booking and expenses in the U.S. and for some operations in Europe and the Asia/Pacific region. The company reports 94,000 employees in more than 150 countries.

43 MERCK & CO. KENILWORTH, N.J.

2016 U.S.-Booked Air Volume: \$94 million

Primary Card Supplier: American Express

Consolidated U.S. TMC: Amex GBT

Pharmaceutical giant Merck & Co.'s U.S.-booked air spending increased in 2016, according to a BTN estimate. Worldwide sales for Merck & Co., known outside the U.S. and Canada as MSD, were \$39.8 billion, an increase of 1 percent compared with 2015. For 2015, the most recent year for which data was available, Merck & Co. generated 283,300 metric tons of carbon dioxide equivalent, including air, rail, hotel, rental car use and reimbursable employee driving mileage. That was an increase of 55 percent from 2014. To limit emissions, Merck & Co. encourages employees to use remote conferencing, and its online booking tool includes rail options to promote lower-emission travel. American Express Global Business Travel services Merck & Co. travel in the Americas and Europe, while BCD Travel services the Asia/Pacific region. Merck & Co. works with Amex GBT for strategic meetings management services. Merck & Co. had about 68,000 employees at the end of 2016, about the same as a year prior.



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45 GENERAL MOTORS

DETROIT

Fiscal Year 2016 U.S.-Booked Air Volume: \$92 million
Consolidated U.S. TMC: Amex GBT

BTN estimates General Motors decreased its U.S.-booked air volume 8.9 percent year over year in 2016. The company's net sales and revenue increased 9.2 percent to \$166.4 billion. GM is investing on the ride-sharing side of the travel industry. It launched its own corporate car-sharing platform, Maven, in which employees can access company-owned vehicles via an app, and it piloted Maven at its facilities in the U.S., Brazil, China and Australia last year. It also has launched programs to provide vehicles to Uber and Lyft drivers who do not want to use their own personal vehicles.

45 TIME WARNER

NEW YORK CITY

2016 U.S.-Booked Air Volume: \$92 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
Principal Expense Supplier: Concur
Principal Card Supplier: American Express
Consolidated Global TMC: BCD Travel

Time Warner increased its U.S.-point-of-sale air spend by more than 16 percent in 2016. The global media and entertainment company has operating divisions for HBO, Turner and Warner Bros. Entertainment, and they have separate but collaborative travel management programs.

47 CHURCH OF JESUS CHRIST OF LATTER-DAY SAINTS

SALT LAKE CITY

2016 U.S.-Booked Air Volume: \$90 million
2016 Global Air Volume: \$150 million
2016 U.S. T&E: \$115 million
2016 Global T&E: \$155 million
Principal Air Suppliers: Delta, American, Air New Zealand, Avianca, Alaska Airlines
Principal Hotel Suppliers: Marriott, Hilton, Starwood
Principal Car Rental Suppliers: Enterprise Holdings, Hertz
Principal Online Booking Tool: e-Travel Management
Principal Card Supplier: Bank of America

U.S.-booked air volume for The Church of Jesus Christ of Latter-Day Saints increased almost 6 percent in 2016. It anticipates an 11 percent increase to \$100 million in U.S.-booked air spend in 2017. In 2016, LDS renegotiated agreements with its top global air carriers and localized agreements with air providers in Asia/Pacific, Europe and Africa. This year, LDS will add more regional air agreements to supplement its global air provider program. It also will initiate an RFP for a global car rental supplier and strengthen duty of care provisions in its travel policy. LDS does not have a consolidated global agency, but it primarily uses Carlson Wagonlit Travel, which handled about 20 percent of the U.S.-

booked air volume in 2016. Fifty-five percent of U.S.-booked air spend was for domestic travel. LDS's website reports more than 70,946 active missionaries, who fund their own travel except for transportation.

48 ABBVIE

NORTH CHICAGO, ILL.

2016 U.S.-Booked Air Volume: \$86 million
Principal Card Supplier: Bank of America
Consolidated U.S. TMC: Amex GBT

As global biopharmaceutical company Abbvie boosted revenue and headcount in 2016, it also increased its travel spending, including \$86 million in U.S.-booked air volume for the year, according to a BTN estimate. Worldwide revenue increased 12 percent to \$25.6 billion, largely due to the strength of the company's arthritis drug Humira and a cancer drug it acquired in 2015, Imbruvica. The company employed 30,000 at the beginning of 2017, up from 28,000 in 2015. Abbvie has worked with Bank of America for a single card platform across 62 countries. Rollout began in EMEA and has continued to North America, Latin America and the Asia/Pacific region. Abbvie also is working with Bank of America to use meeting cards, as well as prepaid cards to pay job applicants' travel expenses.

49 UNITEDHEALTH GROUP

MINNETONKA, MINN.

2016 U.S.-Booked Air Volume: \$85 million
UnitedHealth Group increased its U.S.-booked air volume approximately 18 percent to \$85 million, according to a BTN estimate. Revenue increased 18 percent to \$184.8 billion. Consolidated net earnings increased 21 percent to \$7.1 billion. The company expects inflation, medical technology and pharmaceutical advancement, regulatory requirements and population trends to contribute to overall health care spending growth in the future. UnitedHealth Group employed 230,000 individuals in 2016, up from 200,000 in 2015. The company's primary booking and expense tools, both inside the U.S. and elsewhere, are Concur.

50 GENERAL DYNAMICS

FALLS CHURCH, VA.

2016 U.S.-Booked Air Volume: \$84 million
Principal Online Booking Tool: Concur
Principal Expense Supplier: Concur

According to BTN's estimate, General Dynamics' 2016 U.S.-booked air volume decreased 12 percent from \$89 million in 2015. The global aerospace and defense company's revenue remained fairly flat at \$31.4 billion in 2016. According to the company's annual report, fewer aircraft deliveries in the company's aerospace group were offset by higher U.S. Navy engineering and ship construction work in its marine systems group and higher C4ISR (command, control, communications, computers, intelligence, surveillance and reconnaissance) solutions volume in its information systems and technology group. The U.S. government represented 60 percent, or \$18.8 billion, of revenue in 2016, up 5 percent from the previous year. In 2016, General Dynamics secured more than \$25 billion in new orders. At the end of the year, its

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backlog of orders, an indicator of demand, totaled \$59.8 billion, with \$23.3 billion of work expected to be completed in 2017. Last year, the company acquired aircraft management and charter services provider Avjet and unmanned underwater vehicles manufacturer Bluefin Robotics. At the end of the year, it had 98,800 employees.

51 NIKE BEAVERTON, ORE.

2016 U.S.-Booked Air Volume: \$83 million
Consolidated U.S. TMC: ATG

U.S.-booked air spend decreased in 2016 at global apparel manufacturer and retailer Nike, according to a BTN estimate. Revenue for Nike's 2017 fiscal year which ended May 31, 2017, totaled \$34.4 billion, up from \$32.8 billion in fiscal 2016. Nike's fiscal year 2017 operating overhead expenses, which include travel and meetings, increased less from \$7.19 billion in fiscal year 2016 to \$7.22 billion. Nike's initial five-year contract with travel management company ATG expired in December 2016; the companies have continued the relationship this year. The TMC uses partners to service the account outside the U.S. For the 12 months ending May 31, 2015—the most recent data available—air generated 85,820 metric tons of carbon dioxide equivalent and rental car use generated 1,560 metric tons. On May 31, 2017, Nike employed 74,400 worldwide, including those in retail and part-time positions, up from 70,700 one year earlier.

52 GSK BRENTFORD, U.K.

2016 U.S.-Booked Air Volume: \$79 million
Consolidated U.S. TMC: BCD Travel

GSK's 2016 U.S.-booked air volume increased 75 percent from 2015's \$45 million, according to a BTN estimate. Carbon emissions resulting from GSK's 2015 business travel and commuting amounted to 373,000 metric tons. Revenue rose 17 percent in 2016 to £27.9 billion. Last year, GSK acquired Bristol-Myers Squibb's portfolio of HIV drugs and divested its anesthesia, thrombosis and dermatology foam businesses. The pharmaceutical company reported about 100,000 employees for 2016, about 15,000 of them in the U.S. Of the 3,600 employees disciplined for policy violations, 2 percent were disciplined for T&E-related violations, down from 10 percent in 2015, according to the company's Responsible Business Supplement report. Emma Walmsley replaced Andrew Witty as CEO when he retired in March.

53 INTERNATIONAL MONETARY FUND WASHINGTON, D.C.

2016 U.S.-Booked Air Volume: \$78.8 million
Principal Hotel Suppliers: Starwood, InterContinental, Hilton
Principal Online Booking Tool: GetThere
Principal Card Supplier: BMO MasterCard Diners Club
Principal Expense Supplier: Oracle PeopleSoft
Consolidated U.S. TMC: BCD Travel

The International Monetary Fund's U.S.-booked air volume increased 2 percent in 2016. The IMF expects air volume to decrease 1 percent this year. The IMF, composed of 189 countries, promotes global economic growth and stability to member and developing countries. It employs 2,600 people from 147 countries, of which 2,500 travel for work.

54 UBS ZURICH

2016 U.S.-Booked Air Volume: \$78 million
Consolidated U.S. TMC: BCD Travel

U.S.-booked air spending at global financial services firm UBS increased in 2016, according to a BTN estimate, even as company-wide T&E expenses declined. UBS spent 423 million Swiss francs (US\$415 million) globally on T&E in 2016, an 8 percent decline from 460 million Swiss francs in 2015. Travelers flew 296,200 flight segments, up from 290,000 in 2015. Travelers flew 11,100 person-kilometers per full-time employee, up from 10,900 one year earlier. UBS has offset all emissions related to business air travel since 2007. The company reported 67,000 metric tons of carbon dioxide equivalent as a result of its 2016 air travel, down from 73,600 in 2015. It encourages remote conferencing and high-speed rail to limit emissions. Operating revenue decreased from 30.6 billion in 2015 to 28.3 billion Swiss francs. The company had about 59,400 employees at the end of 2016, down slightly from one year prior.

55 ALLERGAN DUBLIN

2016 U.S.-Booked Air Volume: \$75 million
Principal Air Suppliers: American, Delta, United
Principal Online Booking Tool: Concur
Principal Expense Supplier: Concur
Consolidated U.S. TMC: BCD Travel

Global specialty pharmaceutical company Allergan, formerly known as Actavis, decreased its U.S.-booked air volume in 2016 by almost 17 percent, according to a BTN estimate. Its net revenue increased 14.8 percent to \$14.6 billion. Actavis acquired Allergan in 2015 and assumed the Allergan name, and in 2016, the company divested its global generic pharmaceuticals business for \$33.3 billion and sold its Anda distribution business to Teva Pharmaceutical Industries for \$500 million. Last year, it also acquired Tobira Therapeutics, Vitae Pharmaceuticals and ForSight Vision5, among others. As of Dec. 31, Allergan employed 16,700 people, down from 31,200 in 2015.

56 GOLDMAN SACHS NEW YORK CITY

2016 U.S.-Booked Air Volume: \$74 million
2016 Global Air Volume: \$212 million
2016 U.S. T&E: \$127 million
2016 Global T&E: \$360 million
Principal Air Suppliers: American, British Airways, Cathay Pacific, Delta

Principal Hotel Suppliers: Hilton, Hyatt, Marriott
Principal Car Rental Suppliers: Avis, Hertz, National
Principal Online Booking Tool: GetThere
Principal Card Supplier: American Express
Principal Expense Supplier: Proprietary tool
Consolidated Global TMC: Amex GBT

While the finance company made no changes in suppliers, policies or use of technology in 2016, it managed to reduce its U.S.-point-of-sale air spend by \$16 million from the \$90 million it spent in 2015. It also cut its U.S. T&E in half purely through demand management. With net revenue declining by nearly \$4 billion in 2015 and 2016 to \$30.6 billion in 2016, senior management focused on internal cost reductions, and employees responded by becoming more circumspect on spending, particularly for non-client interactions. The travel team helped drive this by reviewing every non-client travel request in the past year. In 2016 and 2017, it also instituted airfare caps on 19 routes and hotel rate limits in London and Hong Kong.

In 2016, Goldman Sachs worked on business continuity planning, crisis management resilience and management information capabilities. It also continued optimizing contract usage through point-of-sale initiatives and back-office automation. The company used offsets to support its pledge to be carbon neutral from 2015 onward. Goldman uses an individual bill, central pay card program.

Goldman is renegotiating its card contracts with American Express and its travel management company contract with American Express Global Business Travel, all of which expire at the end of 2017. The company implemented Amex GBT Hotel Re-Shop earlier this year and now is piloting the Air Re-Shop Expert tool, both of which are powered by Yapta and rebook cheaper rates. The company is considering changes in ferry service and car rental and other ground transportation services.

57 CREDIT SUISSE ZURICH

2016 U.S.-Booked Air Volume: \$70 million

Credit Suisse decreased its U.S.-booked air spend by 9 percent in 2016, according to a BTN estimate. Net revenue declined 7 percent year over year. In 2016, Credit Suisse reduced its T&E costs, categorized under G&A expenses, by 14 percent. It is the mission of the organization to reduce its carbon footprint, and business travel accounts for 25 percent of its greenhouse gas emissions. Credit Suisse encourages its employees travel by train rather than air for meetings within short distances, as well as to use telephone and videoconferencing to offset emissions. Desktop videoconferencing hours across the organization grew 7 percent year over year. The firm reduced its headcount 2 percent in 2016 to 47,170 full-time-equivalent employees.

58 L-3 TECHNOLOGIES NEW YORK CITY

2016 U.S.-Booked Air Volume: \$69 million

Consolidated Global TMC: Amex GBT

Known as L-3 Communications until Dec. 31, 2016, aerospace and defense contractor L3 Technologies spent slightly more

on U.S.-booked air travel in 2016 than it had a year earlier, according to a BTN estimate. Its \$10.5 billion in sales was less than a percentage point higher than 2015. The U.S. Department of Defense accounted for 70 percent of L3's 2016 sales, and other U.S. federal government agencies accounted for another 3 percent. Operating income increased from \$890 million in 2015 to about \$1 billion in 2016. At the end of 2016, L3 had a total of 38,000 full-time and part-time employees, 84 percent of them in the U.S. Employment figures were steady from one year earlier.

58 WALMART BENTONVILLE, ARK.

2016 U.S.-Booked Air Volume: \$69 million

Walmart's 2016 U.S.-booked air volume rose 5 percent from \$66 million in 2015, according to a BTN estimate. Revenue for fiscal year 2017, which ended in January 2017, increased 0.8 percent to \$485.9 billion. Operating income declined 6 percent, primarily from an increase in operating expenses, including increased wages as part of Walmart's \$2.7 billion plan to invest in its employees, a \$249 million charge related to discontinued real estate projects, and its investment in digital retail and IT, according to its annual report. Walmart acquired e-commerce shop Jet.com in fiscal year 2017 for \$3 billion in cash, a portion of which will be paid over time, and \$300 million in Walmart shares, which also will be paid over time. The acquisition did not impact net sales or operating income significantly, according to the annual report. Walmart also agreed to trade its Yihaodian e-commerce company to JD.com for 5 percent of JD.com outstanding shares. Walmart subsequently purchased another 5 percent. It claimed 2.3 million employees globally as of Jan. 31, up from 2.2 million the previous year.

60 TOYOTA MOTOR SALES U.S.A. PLANO, TEXAS

2016 U.S.-Booked Air Volume: \$68.3 million

Principal Air Suppliers: ANA, Delta, United

Principal Hotel Suppliers: Hilton, Marriott

Principal Car Rental Suppliers: Enterprise, Hertz, National

Principal Online Booking Tool: GetThere

Principal Card Supplier: American Express

Principal Expense Supplier: Chrome River

Consolidated U.S. TMC: BCD Travel

Toyota Motor Sales U.S.A. increased its U.S.-booked air volume by 6 percent to \$68.3 million in 2016, according to a BTN estimate. During the past three years, Toyota Motor Corp. has been consolidating its engineering, sales, marketing, financial services and corporate functions, which previously were in Torrance, Calif. and Erlanger, Ky., into a single headquarters in Plano, Texas. The Plano campus opened in July 2017 and will play host to 5,000 employees. While Toyota Motor Sales U.S.A. does not report individual financial results, net revenue in North America for Toyota Motor Corp. increased 14.2 percent during the company's 2016 fiscal year, which ended March 31, 2016. North American net revenue declined 7.4 percent during fiscal year 2017.

61 THE COCA-COLA CO. ATLANTA

2016 U.S.-Booked Air Volume: \$68 million
Principal Online Booking Tool: Concur
Principal Expense Supplier: Concur
Consolidated U.S. TMC: Carlson Wagonlit Travel

As Coca-Cola has cut travel program costs over the past several years, BTN estimates it spent \$68 million in U.S.-booked air travel in 2016, a \$10 million reduction from the previous year. Coca-Cola also worked to implement Concur online booking and expense globally last year. Net operating revenue declined 5 percent to \$41.9 billion year over year, and the company reported 100,300 employees in 2016.

61 KOCH WICHITA, KAN.

2016 U.S.-Booked Air Volume: \$68 million
2016 Global Air Volume: \$89 million
Principal Online Booking Tool: Concur
Principal Expense Supplier: Concur
Consolidated Global TMC: Carlson Wagonlit Travel

In 2016, Koch's U.S.-booked air volume decreased 6 percent and its global air volume declined 5 percent. Koch employs more than 120,000 people worldwide, up from 100,000 in 2015. About 70,000 are based in the U.S. Koch owns companies in refining, chemicals and biofuels; forest and consumer products; fertilizers; polymers and fibers; process and pollution control equipment and technologies; electronics; information systems; commodity trading; minerals; energy; glass; ranching; and investments.

63 HONEYWELL MORRISTOWN, N.J.

2016 U.S.-Booked Air Volume: \$67 million
 Honeywell's 2016 U.S.-booked air volume decreased 6 percent in 2016, according to a BTN estimate. Selling, general and administrative expenses increased from \$5 billion to \$5.5 billion, owing primarily to labor costs from acquisitions, pension expenses and repositioning charges, according to Honeywell's annual report. COO Darius Adamczyk succeeded Dave Cote as CEO in April. Honeywell spun off of its resins and chemicals business and sold Honeywell Technologies Solutions, its aerospace government services business. The company spent \$2.5 billion in acquisitions, including Xtralis International Holdings, which makes smoke, fire, gas and security threat-detection technologies; Com Dev International, which manufactures hardware for use in space; an outstanding stake in UOP Russell, which makes modular gas processing equipment; and Elster, which makes gas heating, controls and metering technology. At the end of 2016, Honeywell employed 131,000, up from 129,000 the previous year. About 45,000 were in the U.S.

64 NOVARTIS BASEL, SWITZERLAND

2016 U.S.-Based Air Volume: \$66 million
Principal U.S. Air Suppliers: United, American, Delta

Principal U.S. Hotel Suppliers: Marriott, Starwood, Hilton
Principal U.S. Car Rental Suppliers: Hertz, National
Principal U.S. Online Booking Tool: GetThere
Principal Card Supplier: Citi MasterCard
Principal Expense Suppliers: Concur, e-Travel
Consolidated Global TMC: Carlson Wagonlit Travel

Novartis consolidated global travel management services in 2016 under Carlson Wagonlit Travel, switching from HRG. Mid-year, the Swiss pharmaceutical firm issued a new global travel policy to create parity among divisions, and it realized savings in its global travel spend. Novartis additionally increased the footprint of its online booking tools, changed corporate card providers and issued airline and hotel RFPs. In 2017, it will issue car rental and other ground transportation RFPs and simplify travel processes to increase traveler satisfaction. In 2016 Novartis reshaped itself from a group of loosely affiliated divisions into an integrated company, reporting annual revenue of \$48.5 billion. U.S.-booked air volume for 2017 is expected to reach \$89 million, up from \$66 million in 2016. International air bookings form 45 percent of total air volume. Seventy percent of U.S. air bookings were made through Sabre GetThere, including 65 percent that did not require agent assistance.

64 OMNICOM GROUP NEW YORK CITY

2016 U.S.-Booked Air Volume: \$66 million
Principal Air Suppliers: Delta, American
Principal Car Rental Suppliers: Hertz, Budget
Principal Online Booking Tool: Concur
Principal Expense Supplier: Concur
Principal Card Supplier: Bank of America

BTN estimates Omnicom Group's 2016 U.S.-booked air volume decreased by more than 7 percent from the previous year. The company took a stronger stance in reducing travel costs in 2016 by restructuring class of service and implementing policy controls and new pre-trip reporting tools. It also strengthened its airline partnerships, particularly with Delta Air Lines; Delta is an Omnicom client, and they struck a reciprocal deal last year that relegated American, Omnicom's former primary U.S. air supplier, to secondary status. Hertz, Omnicom's longtime primary car rental company, also is an Omnicom client and holds a reciprocal contract. With the addition of new companies to the Omnicom Group, it has grown its travel program in EMEA and enhanced its global duty of care and travel risk management program. The company also began to share metrics by division and company network to ensure adherence to the core travel policy. Revenue increased 1.9 percent to \$15.4 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 78,500 people.

66 VERIZON NEW YORK CITY

2016 U.S.-Booked Air Volume: \$65 million
2016 Global Air Volume: \$71 million
2016 U.S. T&E: \$295 million
2016 Global T&E: \$325 million
Principal Air Suppliers: American, United, Delta

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Principal Hotel Suppliers: Marriott/Starwood, Hilton, InterContinental

Principal Car Rental Suppliers: Enterprise/National, Avis/Budget

Principal Online Booking Tool: Concur

Principal Card Supplier: American Express

Consolidated U.S. TMC: Amex GBT

In 2016, Verizon satisfied all travel needs for contingent workers during the company work stoppage. U.S.-originating air spend decreased by 6.6 percent. An additional decrease of 7 percent is anticipated for 2017. Last year, just over 90 percent of the company's air spend was for domestic travel. This year, Verizon will consolidate all global travel booking activity with Concur Travel, supported by Concur Expense and fulfilled by Verizon's TMC. The company plans to maintain high online booking levels and introduce mobile booking tools. Verizon also will introduce a strategic meetings management program. American Express Global Business Travel handled 98 percent of Verizon's travel business in 2016, and 96 percent of U.S.-originating air travel was booked through Verizon's online tools. The company reported \$126 billion in annual revenue for 2016.

67 BAYER LEVERKUSEN, GERMANY

2016 U.S.-Booked Air Volume: \$64.5 million

2016 U.S. T&E: \$145 million

Principal Air Suppliers: American, Delta, United, Southwest

Principal Hotel Suppliers: Hilton, InterContinental, Marriott

Principal Car Rental Supplier: National, Hertz

Principal Online Booking Tools: Concur

Principal Card Suppliers: American Express, Citi

Principal Expense Supplier: Concur

Consolidated U.S. TMC: BCD Travel

Bayer decreased spending on U.S.-booked air volume by 4.4 percent in 2016. About two-thirds of its travel spending was for international trips. During 2016, Bayer conducted an RFP for car rental and switched to Hertz during the second quarter of 2017. The company also switched from individual bill, individual pay to Citi's CombiPay, under which expense reports are approved and then the system pays Citi on travelers' behalf. Those who do not submit expenses in a timely manner will be subject to Citi late fees. In 2016, the company streamlined its travel policy and in 2017 has made only minor adjustments. While it has a single U.S. travel policy, it does not have single global travel policy. In 2016, 72 percent of Bayer's U.S. air tickets were booked through its Concur online booking tool, and half of those were made without agent intervention. Outside the U.S., the company's primary booking tool was Onesto.

67 MARSH & McLENNAN COS. NEW YORK CITY

2016 U.S.-Booked Air Volume: \$64.5 million

2016 Global Air Volume: \$110.6 million

2016 U.S. T&E: \$143 million

2016 Global T&E: \$283 million

Principal Air Suppliers: Delta, United

Principal Hotel Suppliers: Marriott, Hilton, Accor

Principal Car Rental Suppliers: EHI Holdings (Enterprise/National), Hertz

Principal U.S. Online Booking Tool: GetThere

Principal Card Supplier: American Express

Principal Expense Supplier: Oracle Internet Expenses

Consolidated Global TMC: BCD Travel

In 2016, Marsh & McLennan Cos. focused on cost containment, including airline and hotel negotiations, managing travel demand and compliance to preferred programs. Global air volume decreased almost 10 percent, and U.S.-booked air volume remained flat. The professional services and risk management firm expects the U.S.-booked figure to remain flat as the company encourages compliance to preferred programs and increases online booking adoption. Sixty percent of the company's U.S.-booked air volume is for domestic travel. GetThere is the company's online booking tool in the U.S., and KDS is the primary booking tool in EMEA. The company's American Express corporate card program is mainly individual bill, individual pay. The firm has 26,000 corporate card members, of which 12,500 are based in the U.S.

69 CHEVRON SAN RAMON, CALIF.

2016 U.S.-Booked Air Volume: \$63.6 million

2016 Global Air Volume: \$137.7 million

2016 U.S. T&E: \$125.3 million

2016 Global T&E: \$226.7 million

Principal Air Suppliers: United, Delta, Southwest

Principal Hotel Suppliers: Marriott, Hilton, Hyatt

Principal Car Rental Suppliers: Avis/Budget Group, Enterprise

Principal Online Booking Tool: Concur

Principal Card Supplier: American Express

Principal Expense Supplier: Concur

Consolidated Global TMC: Carlson Wagonlit Travel

In 2016, Chevron strengthened its travel risk management and traveler safety processes and continued to expand implementation and use of the Concur online booking tool. In the third year of a five-year consolidation with Carlson Wagonlit Travel, the energy company streamlined CWT's services via a shared-services model. The company continued its Smart Travel communication campaign to emphasize traveler safety and provide behavioral buying recommendations to reduce overall travel spend. U.S.-booked air spend decreased almost 23 percent, and 80 percent went through Concur, which also provides Chevron's global expense platform.

In 2017, Chevron will continue to review and strengthen travel risk management and traveler safety processes and expand global use of the Concur booking tool. Goals include integrating ride-sharing into the ground transportation program, expanding the influence of the strategic meetings management program and increasing managed-spend volume. Additionally, Chevron will continue to refine mobile strategy to keep employees informed and provide maximum flexibility when traveling. Chevron reported \$110.2 billion in annual revenue for 2016.

70 PUBLICIS GROUPE PARIS

2016 U.S.-Booked Air Volume: \$63 million

Consolidated Global TMC: Amex GBT

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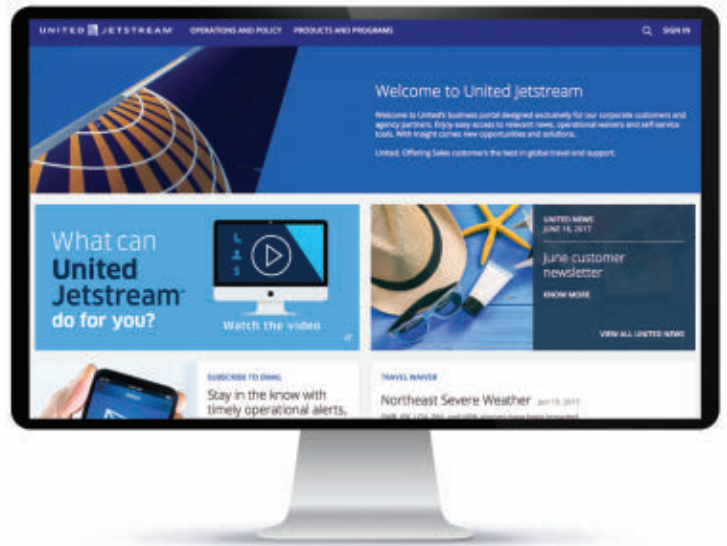
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Revenue for advertising and PR company Publicis Groupe increased 14 percent to €9.7 billion in 2016, and BTN estimates the company's U.S.-booked air volume increased, as well.

Publicis logged about 765.8 million kilometers of business travel in 2016, about 8.1 percent more than the 707.8 million tallied in 2015. The company has focused on reducing long-haul travel through remote conferencing and pushes lower-emission forms of transportation, including public transportation and energy-efficient taxis.

Publicis travel policy classifies countries into three risk levels. Business travel to the riskiest category is banned, while travel to other locations may be permitted after a risk assessment and, if necessary, security measures. Publicis has implemented a traveler-tracking tool to locate all travelers in case of an emergency. The company has a fleet of electric vehicles at headquarters for local business travel.

Subsidiaries include Publicis Worldwide, Saatchi & Saatchi, Starcom Mediavest Group and 2015 acquisition Sapient. Publicis employed 78,900 at the end of 2016, slightly more than 12 months earlier.

71 LILLY INDIANAPOLIS

2016 U.S.-Booked Air Volume: \$61 million

2016 Global Air Volume: \$113.5 million

2016 U.S. T&E: \$225 million

2016 Global T&E: \$330 million

Principal Air Suppliers: United, Delta, Southwest

Principal Hotel Suppliers: Marriott, Starwood

Principal Car Rental Suppliers: Enterprise/National

Principal U.S. Online Booking Tool: Concur

Principal Non-U.S. Online Booking Tool: GetThere

Principal Card Supplier: U.S. Bank Visa

Principal U.S. Expense Supplier: Concur

Principal Non-U.S. Expense Supplier: IBM Global Expense Reporting Solutions

Consolidated Global TMC: Carlson Wagonlit Travel

In 2016, Lilly implemented a single global T&E policy that incorporates additional regional and local procedures. The global pharmaceutical company implemented Yapta's FareIQ and RoomIQ rate-tracking technologies. Air volume increased 3 percent for U.S.-booked flights, and the company expects a 7 percent increase for 2017. Lilly plans to improve cost savings and optimize travel procedures this year. It will allow more direct flights for domestic U.S. travel, which accounted for 44 percent of U.S.-originating bookings in 2016. Last year, 62 percent of bookings went through approved online channels, and 79 percent required no agent assistance. Lilly uses U.S. Bank Visa in the U.S. and Citi Visa elsewhere. The company reported revenue of \$21.2 billion for 2016.

72 MORGAN STANLEY NEW YORK CITY

2016 U.S.-Booked Air Volume: \$60 million

Consolidated Global TMC: Amex GBT

Morgan Stanley created focus groups in 2016 to demo the online booking tool it had redesigned to make the interface more user

friendly. It had launched it originally in 2014 and officially relaunched it earlier this year. In 2016, Morgan Stanley also developed an automated process to reconcile business travel account cards and launched an RFP for a global online booking tool for ground transportation. Morgan Stanley's 2016 U.S.-booked air volume decreased 6 percent from \$63.8 million in 2015, according to a BTN estimate. It employs about 55,000 people in 43 countries. Full-year net revenue for 2016 totaled \$34.6 billion, down about 1.7 percent.

73 DANAHER WASHINGTON, D.C.

2016 U.S.-Booked Air Volume: \$58 million

BTN estimates Danaher reduced its U.S.-booked air volume by almost 8 percent in 2016. Danaher operates in dental products, life sciences and diagnostics and environmental products, among other areas, and owns more than 40 companies. Last year, the company spun off its test and measurement segment, industrial technologies segment and retail and commercial petroleum business into a publicly traded company called Fortive. It also invested almost \$5 billion into eight acquisitions, the most significant of which was its \$4 billion buy of Cepheid. The conglomerate's sales increased almost 17 percent in 2016 to \$16.9 billion. It increased its number of employees from 59,000 in 2015 to 62,000.

74 P&G CINCINNATI

2016 U.S.-Booked Air Volume: \$57 million

Consolidated Global TMC: Egencia

P&G reduced its U.S.-booked air volume by more than 10 percent in 2016, according to a BTN estimate. Following a competitive RFP, P&G implemented new airline agreements in July 2016. In the process, the company streamlined the preferred carriers and in so doing exceeded savings expectations. In Asia, the company changed its travel policy for the minimum flying hours to use business class from six to eight hours. It also does not allow business class within Asia except in China. P&G also consolidated and centralized travel management in 15 additional EMEA countries. Last year, the company started to apply mobile technology to the travel program and piloted both an ISOS security map app in the U.S. and Panama and Yapta's re-shopping tech. P&G remains Egencia's largest U.S. corporate travel management client. This year, the company is conducting an RFP for travel agency services in Latin America, Asia and India, the Middle East and Africa. By the end of this year, P&G plans to roll out Concur Expense to the first of its brands and to complete that implementation next year.

75 BOSTON SCIENTIFIC MARLBOROUGH, MASS.

2016 U.S.-Booked Air Volume: \$56.9 million

2016 Global Air Volume: \$92.8 million

2016 U.S. T&E: \$146 million

2016 Global T&E: \$258 million

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Principal Air Suppliers: Delta, United, Southwest
Principal Hotel Suppliers: Marriott, Hilton, InterContinental
Principal Car Rental Supplier: Hertz
Principal Online Booking Tool: Concur
Principal Card Supplier: Citi
Principal Expense Supplier: Concur
Consolidated U.S. TMC: Amex GBT

Boston Scientific increased its U.S.-point-of-sale air spending by 15 percent in 2016 as it deepened its data visibility by globalizing its booking, expense and travel management platforms. In 2016, Boston Scientific consolidated nine European travel offices into American Express Global Business Travel's travel center in Barcelona, where an exclusive team serves Boston Scientific travelers. The company continues to enhance its compliance scorecard, which captures travel, expense and financial data from Amex GBT, Concur and internal financial systems to compare spending against budgets. Through policy changes, the company replaced meal limits for breakfast, lunch and dinner that differed by market with global caps. Boston Scientific's travel policy applies globally, though certain countries have more restrictive policies.

76 21ST CENTURY FOX NEW YORK CITY

2016 U.S.-Booked Air Volume: \$56.6 million
2016 U.S. T&E: \$76.8 million
Principal Air Suppliers: American, Delta, British Airways
Principal Hotel Suppliers: InterContinental, Marriott, Hilton
Principal Car Rental Suppliers: National/Enterprise, Hertz
Principal Online Booking Tools: GetThere, Concur
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. The company just started implementing the tool in July 2017. It also has been automating the central billing accounts for its air, hotel and car programs. Travelers use Sabre's GetThere tool in the U.S. and Concur in Europe except the U.K. and in parts of Latin America. And the company implemented an online booking tool for its sports production division in 2016. In 2016, 84 percent of 21st Century Fox's air volume went through that tool. In 2017, the company renegotiated its airlines deals with its primary airline. Also in 2017, the company embarked upon a duty of care project and is deploying International SOS traveler tracking globally. Included with that, it is globalizing its travel program with its travel agency, HRG, and its preferred airlines, hotels and car rental companies. It expects to complete this by the end of 2018.

77 BP LONDON

2016 U.S.-Booked Air Volume: \$55.6 million
Consolidated Global TMC: Carlson Wagonlit Travel
 With an energy sector rebound on the horizon, following years of low oil prices, BP increased its U.S.-booked air volume 9 percent

to \$55.6 million in 2016, according to a BTN estimate. BP uses an internal dashboard to scores travelers in such areas as online booking, lowest logical airfare and preferred hotel policies. This has helped the company drive savings over the last few years. To aid with traveler security, BP has a 24-hour response information center that monitors global events. It quickly identified, notified and accounted for travelers during the March 2016 Brussels terrorist attacks. BP also provides online training in travel health for employees. BP has been searching for a new expense reporting solution since IBM pulled its standalone Global Expense Reporting System off the market. BP's sales and other operating revenue declined 23.2 percent to \$33.2 billion in 2016. The company reported 74,500 employees in 72 countries at the end of last year.

78 COGNIZANT TEANECK, N.J.

2016 U.S.-Booked Air Volume: \$55 million
Consolidated Global TMC: BCD Travel
 IT services company Cognizant increased its U.S.-booked air volume enough in 2016 to put it squarely on the Corporate Travel 100 list for the first time, according to BTN's estimate. Growth in the size of the travel program has coincided with rapid company growth. Cognizant's annual revenue of \$13.5 billion marked an increase of 8.6 percent from 2015. The company employed more than 150,000 people from India and a total of 244,000 globally as of Dec. 31, 2016, an increase of more than 15 percent from a year prior.

79 JOHNSON CONTROLS MILWAUKEE

2016 U.S.-Booked Air Volume: \$54.3 million
Principal Card Supplier: Citi
Consolidated U.S. TMC: Amex GBT
 In September 2016, Johnson Controls, a diversified technology and multi-industrial company, completed its merger with Tyco, which produces electronic security and fire protection systems. In the fourth quarter, Johnson Controls completed the spinoff of its automotive business. The company cloned its travel program for the new business, called Adient. Johnson Controls U.S.-booked air volume decreased 12 percent in 2016. It expects U.S.-booked air volume to decrease 8 percent to \$50 million in 2017. American Express Global Business Travel is Johnson Controls' consolidated U.S. travel management company and its primary agency outside the U.S. For 2017, Johnson Controls will create a travel program for the merged company. Following 2016's merger and divestiture, the company had 117,000 employees and reported \$37.7 billion in annual revenue for the year.

80 AMGEN THOUSAND OAKS, CALIF.

2016 U.S.-Booked Air Volume: \$54 million
Principal Air Suppliers: United, Delta, Southwest
Principal Hotel Suppliers: Marriott, Hilton

Principal Car Rental Supplier: Hertz
Principal Online Booking Tool: Concur
Principal Card Supplier: American Express
Principal Expense Supplier: Concur

Consolidated Global TMC: Carlson Wagonlit Travel

Pharmaceutical and biotechnology firm Amgen optimized \$1.9 million in savings in 2016 by focusing on policy compliance, savings strategies and program satisfaction. For 2016, Amgen reported 89 percent travel policy compliance and an online adoption rate of 77 percent. Sixty percent of tickets were issued 14 days in advance, and 94 percent of nonrefundable tickets were reused. Amgen also reported a travel program satisfaction rating of 8.5 on a 10-point scale. The company increased its U.S.-booked air volume 6 percent in 2016 and expects that figure to increase to \$57.2 million in 2017. For 2017, the company expects to continue its focus on travel policy compliance and officially incorporate ride share service Uber into Amgen's travel program. The company reported \$22.9 billion in annual revenue for 2016.

80 KIEWIT
OMAHA

2016 U.S.-Booked Air Volume: \$54 million
Consolidated Global TMC: Travel and Transport

Kiewit, one of the world's largest contractors in the world, slightly increased year over year its U.S.-booked air volume to \$54 million in 2016, according to BTN's estimate. The employee-owned organization—which operates through a network of subsidiaries in the U.S., Canada, Australia and Mexico—reported revenue of \$8.6 billion, down slightly from 2015. The organization has about 20,000 employees.

80 STRYKER
KALAMAZOO, MICH.

2016 U.S.-Booked Air Volume: \$54 million

Medical device and equipment manufacturer Stryker's U.S.-booked air volume increased almost 17 percent in 2016, according to a BTN estimate. Revenue totaled \$11.3 billion, a 14 percent increase from 2015. The company employed approximately 33,000 employees in 2016, up from 26,000 in 2015. In 2015, it merged its European and U.S. businesses and in 2016 extended its transatlantic operating model to Canada. Last year, Stryker invested \$4 billion in acquisitions: its medical division acquired Sage Products and Physio-Control International, and the company completed other small acquisitions across its three operating segments.

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80 VIACOM
NEW YORK CITY

2016 U.S.-Booked Air Volume: \$54 million
Principal Online Booking Tool: Concur
Principal Expense Supplier: SAP
Consolidated U.S. TMC: Carlson Wagonlit Travel

Viacom's U.S.-booked air volume rose 11 percent in 2016, according to a BTN estimate. This increase coincides with the media and entertainment company's continued efforts to expand its footprint in international markets. At the same time, the company has worked to globalize its managed travel program. Viacom has consolidated its U.S. business with Carlson Wagonlit Travel; it put a global travel management company RFP out to bid in 2015. BTN has not uncovered the outcome of that tender. The company rolled Concur Travel out to U.S. employees in 2015. Viacom continues to use SAP for expense reporting both in the U.S. and international markets.

84 EPIC SYSTEMS
VERONA, WIS.

2016 U.S.-Booked Air Volume: \$53 million

Medical software developer Epic makes its debut on the CT100 list, having an estimated \$53 million in U.S.-point-of-sale air bookings in 2016. Forty percent of the company's 10,000 employees travel to service many of the nation's largest health systems. Epic operates a 24/7 travel department that it views as essential to maintaining traveler happiness and retention. As an added benefit for employees, the team accommodates personal travel requests on over 20 percent of the company's 106,000 annual business trips. The travel team also offers all employees discount adventure trips for their downtime. Epic hosts software training and several large conferences at its 1,000-acre campus, attracting tens of thousands of visitors a year. Nearly 70 Madison, Wis.-area hotels provide bulk discounts for Epic visitors, and many provide complimentary shuttles to campus.

85 BARCLAYS
LONDON

2016 U.S.-Booked Air Volume: \$52 million

As Barclays engaged in one of the largest restructurings in its history in 2016, it cut its U.S.-booked air travel spend more than 13 percent to \$52 million, according to a BTN estimate. Restructuring efforts, including a significant cut in the ownership of its African operations, have reduced the size of the company, and restructuring continued into this year. Barclays aims to reduce carbon emissions 30 percent by 2018, and emissions, including those from business travel, declined 15.8 percent last year. That came through stricter controls on business travel and approval processes. Carbon emissions from air travel decreased 31.9 percent, those from rail travel declined 50 percent, emissions from taxi went down 28.3 percent and they decreased 43.7 percent for car hires.

85 UPS
ATLANTA

2016 U.S.-Booked Air Volume: \$52 million

Based on a BTN estimate, UPS increased its U.S.-booked air volume by \$9 million in 2016. The delivery company employs 434,000 people globally, 350,000 of those in the U.S. Revenue grew more than 4 percent in 2016 to \$61 billion.

85 WPP
LONDON

2016 U.S.-Booked Air Volume: \$52 million

WPP's air travel decreased 3 percent year over year to 571 million miles in 2016. The multinational advertising and PR company could owe that to cost pressures like foreign exchange on the cost of travel, according to its sustainability report, and an increase in the use of videoconferencing. Air travel represents 37 percent of WPP's carbon emissions and produced 92,445 tons, a 7 percent decrease from 2015. The company offsets all air travel emissions by purchasing carbon credits. In 2016, it invested £150,000 (US\$194,027) to support four renewable energy-generation projects. WPP also added 20 videoconferencing units, increasing the total to 720 in 173 cities. BTN estimates WPP's 2016 U.S.-booked air volume remained the same as in 2015, at \$52 million. Revenue in 2016 increased 18 percent to £14.4 billion. WPP acquired 56 companies in 2016 and spent £600 million net of cash on initial acquisition payments, according to the company's annual report. At the end of 2016, WPP operated 160 companies with 132,657 employees, up 6 percent from the previous year's employees.

88 AON
LONDON

2016 U.S.-Booked Air Volume: \$51 million

2016 Global Air Volume: \$106 million

Principal Air Suppliers: Star Alliance, Oneworld, SkyTeam & JV partners

Principal Hotel Suppliers: Hyatt, Hilton, Marriott, Accor

Principal Car Rental Suppliers: Avis, Budget

Principal Online Booking Tool: GetThere

Principal Expense Supplier: Oracle PeopleSoft

Principal Card Supplier: American Express

Consolidated/Primary Global TMC: Carlson Wagonlit Travel

Aon's 2016 U.S.-booked air volume decreased five percent from \$53.7 million in 2015. The risk, retirement and health solutions firm completed eight acquisitions totaling \$879 million, according to its annual report. In the first quarter, it acquired Australian insurance, retirement and investment consulting firm Globe Events Management and Minneapolis-based talent analytics company Modern Survey. In the second quarter, Aon acquired New Zealand-based insurance brokerage firms Nex Insurance Brokers and Bayfair Insurance Centre, as well as Unvers Workplace Solutions, an elective benefits enrollment

and communication services firm in New Jersey. In the third quarter, it acquired Cammack Health, a health and benefits consulting firm in New York. In the last quarter of 2016, Aon acquired global cyber-risk management firm Stroz Friedberg, hiring assessment firm CoCubes in India and Brazilian health and benefits brokerage solutions firm Admix. Despite the acquisitions, Aon maintained its 2016 headcount at 69,000, as it did the previous year.

89 ALLSTATE NORTHBROOK, ILL.

2016 U.S.-Booked Air Volume: \$50 million

2016 Global Air Volume: \$64 million

2016 U.S. T&E: \$187 million

2016 Global T&E: \$215 million

Principal Air Suppliers: United, Delta, Southwest

Principal Hotel Suppliers: Marriott, Hilton, InterContinental

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

Principal U.S. Online Booking Tool: Concur

Primary Non-U.S. Online Booking Tool: GetThere

Principal Card Supplier: Citi MasterCard

Principal Expense Supplier: SAP

Consolidated U.S. TMC: Travel and Transport

In 2016, Allstate beta-tested a self-serve sales portal from United Airlines to enable customizable reporting and self-processing of waivers and other services that previously required the carrier's intervention. The company also added a compliance and consequences section to its travel policy, increased hotel attachment by 10 percentage points and reduced exchanged tickets by 9 percentage points. Global T&E spend increased \$18 million, or 9 percent. U.S. T&E spend remained flat. This year, Allstate plans to establish a formal meetings and events policy and deploy a strategic meetings management program. The company expects U.S.-booked air spend to remain at \$78 million. The company has a single travel policy for more than 80 percent of travel spend. Travel and Transport is Allstate's consolidated agency in the United States, and other Radius partners handle some of its non-U.S. business.

89 SAMSUNG SEOUL, SOUTH KOREA

2016 U.S.-Booked Air Volume: \$50M

2016 U.S. T&E: \$74 million

Principal Air Suppliers: American, Korean Air, United Airlines

Principal Hotel Suppliers: Hilton, Marriott, Starwood

Principal Car Suppliers: Hertz, National

Principal Online Booking Tool: GetThere

Principal Card Supplier: Visa

Principal Expense Supplier: Proprietary tool

In 2016, most of Samsung's 169 subsidiaries and 38 affiliates simplified their travel approval processes. The conglomerate also shifted its travel policy toward lowest logical fare on most direct flights. Some affiliates also let employees combine business travel

with leisure. Of more than 308,745 travelers in 79 countries, 6,000 are travelers. The company's 2016 U.S.-booked air volume declined 12 percent from \$57 million in 2015. Samsung is an accredited Corporate Travel Department. It doesn't have a global consolidated agency but outside of the U.S. uses Carlson Wagonlit Travel primarily. Despite the recall and discontinuation of Samsung's Galaxy Note 7 mobile device, 2016 revenue totaled \$174 billion, up from \$173 billion the previous year, according to its annual review. Operating profit rose 11 percent from 2015's \$22.8 billion. The company is on track to reduce greenhouse gas emission intensity at worksites by 70 percent of 2008 levels by 2020, according to its sustainability report.

91 FORD MOTOR CO. DEARBORN, MICH.

2016 U.S.-Booked Air Volume: \$49.4 million

Consolidated Global TMC: Amex GBT

Ford Motor Co. spent \$49.4 million on U.S.-booked air volume in 2016, as estimated by BTN. Ford dropped off BTN's list in 2015 and 2016, and its place could be short lived now. Amid declining revenue and the need to invest in innovation, the company began pursuing costs of \$3 billion annually in 2016, 2017 and 2018, a potential negative impact on travel. To reduce labor costs, Ford had planned to build a small car manufacturing plant in Mexico and move those operations out of the U.S. but scrapped the project. Instead, it will move small car manufacturing to China to leverage existing manufacturing capacity there and will expand its Kentucky plant to focus on SUVs and crossovers, preserving about 1,000 jobs there. Even so, the automaker announced in May that it would lay off approximately 10 percent of salaried positions this year, mostly in the U.S. and Asia/Pacific, a move that also could reduce travel volume. Ford named former Steelcase chief executive Jim Hackett as CEO in May. He replaced outgoing CEO Mark Fields.

92 ITW GLENVIEW, ILL.

2016 U.S.-Booked Air Volume: \$49 million

2016 Global Air Volume: \$73 million

2016 U.S. T&E: \$106 million

2016 Global T&E: \$144 million

Principal Air Suppliers: United, Delta, American

Principal Hotel Suppliers: InterContinental Hotels Group, Marriott, Hilton

Principal Car Rental Suppliers: Hertz, Enterprise

Principal Online Booking Tool: Concur

Principal Card Supplier: American Express

Principal Expense Supplier: Concur

Consolidated U.S. TMC: Amex GBT

In 2016, ITW received the Concur Innovation Award, based on use of Concur tools to improve processes, create best practices or capitalize on ROI. As a cost-savings initiative, the industrial equipment manufacturer implemented value-added tax reclamation. Seventy-five percent of ITW's 2016 U.S.-booked air volume was for domestic travel, up slightly

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over the previous year. U.S.-booked air volume remained at \$49 million in 2016, and the company expects a 2 percent increase in air spend this year. For 2017, ITW will implement T&E programs and review travel policy. Its travel program uses a single global policy for its 20,000 travelers. Last year, 89 percent of air bookings originating in the U.S. went through approved online tools and 80 percent of the company's travel business was handled by American Express Global Business Travel. The company uses American Express as its corporate card supplier on an individual bill, individual pay model. ITW reported \$13.6 billion in annual revenues in 2016.

93 DAIMLER STUTTGART, GERMANY

2016 U.S.-Booked Air Volume: \$47 million
Principal Card Supplier: AirPlus
Principal Online Booking Tool Supplier: e-Travel Management
Consolidated Global Agency: BCD Travel

BTN estimates Daimler spent \$47 million in U.S.-booked air travel in 2016, earning it a place in the CT 100 for the first time in five years. The automaker has simplified its travel processes after estimating that booking and expense reports cost it €25 million in productivity each year. The simplification includes working with global travel management company BCD Travel, payment supplier AirPlus and online booking tool supplier Amadeus to create the FiveStar Model, which handles payments through virtual account numbers and automatically reconciles invoices during the trip. Daimler is rolling out that model region by region this year. Revenue increased 3 percent in 2016 to €153.3 billion. The company reduced its headcount by 1 percent to 282,488.

94 EMERSON ST. LOUIS

2016 U.S.-Booked Air Volume: \$45 million
U.S.-booked air volume in 2016 fell 8 percent year over year at manufacturing conglomerate Emerson, according to a BTN estimate. For the 12 months ending Sept. 30, 2016, the company's net sales, impacted by weak oil and gas markets, fell 9 percent year over year to \$20.2 billion. The company in 2016 continued restructuring activities that began in 2015, and its expense for those activities totaled \$112 million for its fiscal year. In late 2016 and early 2017, Emerson successfully divested two of its business units. It sold its Columbus, Ohio-based Network Power unit to investment firm Platinum Equity for \$4 billion. It also sold its Leroy-Somer and Control Techniques businesses to Nidec Corp. for a reported \$1.2 billion. Emerson averaged 103,500 employees during its 2016 fiscal year, down from 110,800 the previous 12 months. Of the fiscal year 2016 employees, 29,000 were related to the businesses Emerson discontinued. The company uses Carlson Wagonlit Travel and American Express Global Business Travel for travel services throughout the world.

94 NESTLE VEVEY, SWITZERLAND

2016 U.S.-Booked Air Volume: \$45 million
Principal Online Booking Tool: Concur
Consolidated U.S. TMC: BCD Travel

Food and beverage conglomerate Nestle's U.S.-booked air volume dropped nearly 14 percent in 2016. The company continues to reduce travel and its associated environmental impact, including cutting its budget and strictly interpreting corporate travel policy. Nestle promotes remote conferencing and other technologies as alternatives to travel and displays greenhouse gas emission information along with fares in the Concur Travel online booking tool. The company also pushes users to rent electric cars. 2016 revenue grew to 89.5 billion Swiss francs, or US\$92.7 billion, about 3 percent more than the previous year. The company had 328,000 employees at the end of 2016, about 7,000 fewer than in December 2015. In February 2017, it announced it would begin in September 2017 the \$40 million process of moving U.S. headquarters from Glendale, Calif., to Arlington, Va.

94 SALESFORCE SAN FRANCISCO

2016 U.S.-Booked Air Volume: \$45 million
Principal Online Booking Tool: Concur
Principal Card Supplier: American Express
Principal Expense Supplier: Concur
Consolidated Global TMC: BCD Travel

Last year, Salesforce developed a traveler-centric program to balance cost savings and employee productivity. In 2016, online booking adoption for its travelers was around 80 percent globally and 86 percent for U.S.-booked air using primary booking tool Concur, of which 75 percent did not require agent assistance. In 2017, the enterprise software company is leveraging global data to build a dynamic and scalable travel program. Additionally, Salesforce will expand its global travel program into Brazil. Salesforce's innovative travel strategy relies on its Chatter and other internal company tools to support travelers and integrate apps. The company works closely with suppliers from a loyalty perspective and encourages preferred suppliers to build relationships directly with travelers via Chatter. The aggressive pursuit of a program that is social, mobile and open has changed travel at Salesforce and served as an innovation incubator for the industry.

97 PEPSICO PURCHASE, N.Y.

2016 U.S.-Booked Air Volume: \$44.8 million
2016 Global Air Volume: \$89 million
Consolidated U.S. TMC: Amex GBT

On Jan. 1, 2016, PepsiCo put in place a uniform travel policy across all divisions, though it continued to use American Express Global Business Travel in the U.S., Mexico and the Middle East; Egencia

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in Europe and other travel management companies elsewhere. Other differences also remain in certain regions and divisions. For instance, the company uses a pre-trip approval process in Europe but not in the U.S. PepsiCo is rolling out Concur Expense globally. Its sourcing efforts are shaped by its reciprocal relationships with suppliers and customers. The company also uses both Yapta and Tripbam re-shopping tools to augment its sourcing efforts. The company, which substantially decreased its global and U.S. air volume in the past two years, had overall revenue of \$63 billion at the end of 2016 and 274,000 employees.

98 3M
ST. PAUL, MINN.

2016 U.S.-Booked Air Volume: \$44.2 million
2016 Global Air Volume: \$67.3 million
2016 U.S. T&E: \$126.8 million
2016 Global T&E: \$242 million
Principal Air Supplier: Delta
Principal Hotel Suppliers: Hilton, Marriott, Starwood
Principal Car Rental Supplier: National
Principal U.S. Online Booking Tool: Concur
Principal Non-U.S. Online Booking Tool: e-Travel Management
Principal Card Supplier: Citi MasterCard
Principal Expense Supplier: Concur
Consolidated U.S. TMC: Carlson Wagonlit Travel

Manufacturing company 3M increased its U.S.-booked air volume by \$1.2 million in 2016, still significantly lower than the \$51.5 million it recorded in 2014. In 2016, 88 percent of U.S.-point-of-sale bookings went through Concur. Seventy percent of those required no agent assistance, up from 50 percent in 2015. In 2016, 3M implemented a global travel policy and credit card strategy and rolled out Concur in North America. In 2017, it plans to implement Concur in Latin America and Asia/Pacific. It expects to consolidate in EMEA and any remaining countries in 2018. Global travel policy implementation continues this year with further travel management company consolidation under Carlson Wagonlit Travel and BCD Travel. 3M also plans to consolidate credit card suppliers. In 2016 Citi MasterCard provided corporate credit cards for 3M in the U.S. and Canada. As of Dec. 31, 3M employed nearly 90,000 people, down slightly from the previous year. Revenue for 2016 was \$30 billion, down slightly from \$30.3 billion in 2015. Earnings per share increased 8 percent in 2016.

99 UNITED NATIONS HQ
NEW YORK CITY

2016 U.S.-Booked Air Volume: \$44.1 million
2016 U.S. T&E: \$72 million
Principal Air Suppliers: Delta, Turkish Airlines, Air France
Principal Expense Supplier: SAP
Consolidated Global TMC: Amex GBT

United Nations HQ launched SAP for expense management globally in late 2015 and stabilized the program in 2016. U.S.-booked air volume increased 7.5 percent in 2016, and the organization expects it to remain flat this year. Last year, 95 percent of air bookings originating in the U.S. were for international travel. This year, the organization will refine the SAP expense program, continue business intelligence reporting and streamline corporate travel policy. Hotel bookings for UN HQ employees operate under a per-diem system, and the organization does not have a car rental program.

100 McKESSON
SAN FRANCISCO

2016 U.S.-Booked Air Volume: \$43 million
2016 Global Air Volume: \$45 million
2016 U.S. T&E: \$122 million
2016 Global T&E: \$133 million
Principal Air Suppliers: Delta, United, American
Principal Hotel Suppliers: Marriott, Hilton, InterContinental
Principal Car Rental Suppliers: Hertz, Avis
Principal Online Booking Tool: Concur
Principal U.S. Expense Supplier: SAP
Consolidated U.S. TMC: Amex GBT

McKesson's 2016 U.S.-booked air volume declined about 15 percent from 2015 levels, as the pharmaceutical and medical supply firm pushed to reduce the cost of business travel. Among McKesson's 2016 cost-cutting initiatives were restrictions on same-day travel and the allowance of ride-sharing. The company also increased its level of policy-compliance reporting and continues to encourage remote conferencing and virtual meetings as alternatives to travel. McKesson also conducted a hotel RFP in 2016. In 2017, the company is globalizing its travel program. While the vast majority of McKesson's travel spending in 2016 was for U.S. bookings, the company does have operations in Canada, Ireland, Israel, New Zealand and the U.K. Different regions and business units can formulate their own travel policies. McKesson does not have a consolidated travel management company outside the U.S., though Egencia serves as its primary TMC outside the U.S. As of March 31, 2017, McKesson employed 78,000 employees, 27,000 of whom were part-time. One year earlier, the company employed 68,000 full-time-equivalent employees.

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