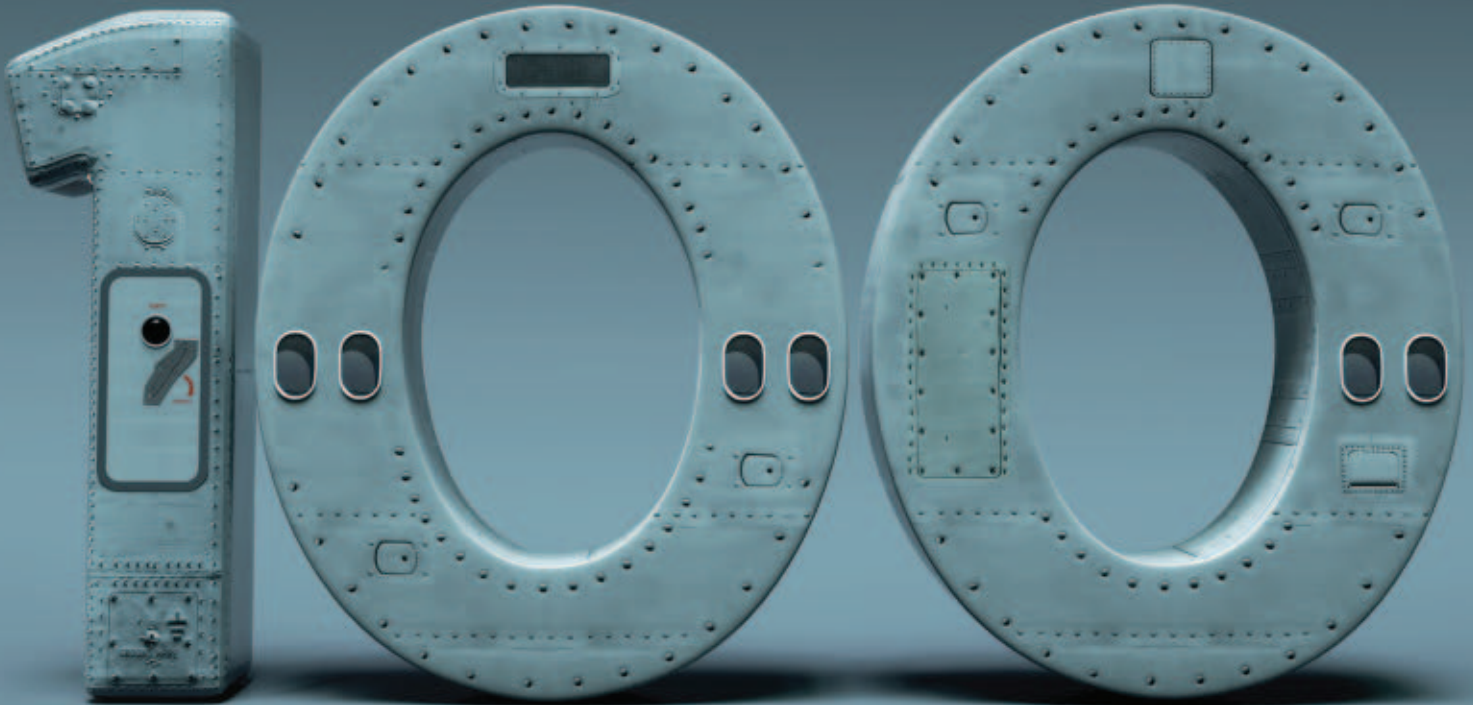


BTN

BUSINESS TRAVEL NEWS

October 1, 2018

2018 CORPORATE TRAVEL



BTN'S 31ST ANNUAL LIST OF THE BIGGEST CORPORATE TRAVEL SPENDERS IN THE U.S.

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FOUR POINTS



What's Trending for BTN's Corporate Travel 100

BY ELIZABETH WEST

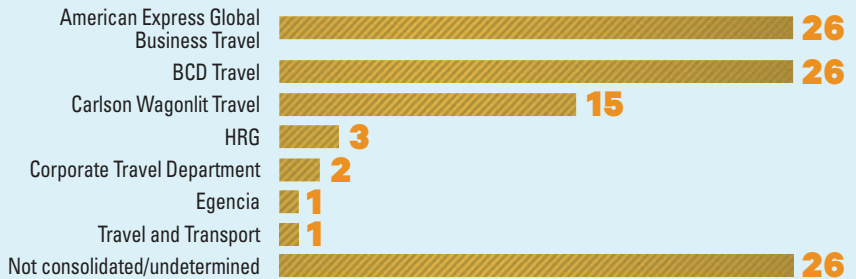
BTN's annual list of the biggest corporate travel spenders in the U.S., isn't just a "top 100" list. It's a microcosm for exploring trends and innovation in the managed travel industry. These companies not only spend major dollars on travel but they also often are the companies that signal shifts in deal-making strategies, traction with new technologies and even current moods in travel management priorities. For example, are companies doubling down on cost-optimization or are they focused on traveler experience and productivity?

The companies on this list have never been "all-in" on a particular strategy or priority. Often, trends run through industry verticals driven by economic realities, regulatory requirements, perception issues or competition for talent. Some are the result of new management capabilities—i.e., new technology. Following are six of the top trends running through BTN's 2018 Corporate Travel 100.

VIRTUAL TRAVEL ALTERNATIVES: At least a dozen companies in the 2018 Corporate Travel 100 have taken a hard turn toward virtual meeting technology, videoconferencing and desktop video-calling like Skype, often to replace internal travel. While the tech has been available for a long time, acceptance as a travel alternative seems to be getting traction. That said, virtual travel and screen-mediated meetings aren't necessarily putting a major dent in overall travel spend. Three-quarters of the companies that specifically noted their investment in such technologies also saw their 2017 travel spend increase, at least slightly, over 2016 levels. This suggests that virtual travel may be freeing up resources for more client visits and business building that in the past might have busted the budget.

METHODOLOGY: The CT 100 is based on 2017 air tickets purchased at all U.S. points of sale for domestic and 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.

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



EMPLOYEE EXPERIENCE: Another group of companies referred specifically to their efforts around traveler engagement, experience or personalization in 2017 and 2018. Half the companies in that group have something in common: They are big technology names like IBM, Dell, Microsoft and Oracle. This, informed by BTN's reporting outside the CT 100, underscores a couple major drivers. First, the strength of the economy and continued growth of these tech businesses. Second, the fierce competition among these companies for talent.

MOBILE TECH STRATEGY: That brings us to another trend, the continued "digitalization" of travel management processes with a mobile-first strategy. IBM is actually building its own mobile travel platform and plans to release it as a product in the near future. Microsoft is relying on some outside suppliers and continues to push the industry toward a more digital future that includes deep personalization. German automotive manufacturer Daimler has similar ambitions but has focused more on process.

PRETRIP APPROVAL: This is a point of difference among the CT 100 and yet also a point of common consideration. Nearly a dozen companies cited changing their stance on pretrip approval, signaling its critical position in controlling costs and contributing to traveler safety and security procedures but also its drawbacks as a bottleneck and frustration point for travelers.

PRICE ASSURANCE TECHNOLOGY: A relative newcomer to travel management but one that is taking hold in the CT 100 are technologies that reshape both air and hotel bookings to ensure companies get the best possible price on business travel. Part of their growing usage tracks back to partnerships these technology providers have made with travel management companies to incorporate price assurance into their own offerings. But many of the larger companies go direct to the tech providers and customize the "if/then" rebooking scenarios to fit their programs and travelers' needs. The larger impact of these technologies, particularly in the hotel space, may be the effect they have on the willingness of companies to move toward dynamic pricing agreements.

BUSINESS INTELLIGENCE TOOLS: The holiest grail for travel management programs is the consolidation of data into that "one true source" or "total trip cost." More companies are moving in this direction and implementing better data tools around travel management. The power of machine learning will push this effort forward, and some companies are taking advantage. UBS is a standout in this regard. ■

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Dear Global Business Partners,

It is a privilege to again be sponsoring the Business Travel News Corporate Travel 100. This special research report highlights the spending, critical partnerships and changing needs of the largest corporate travel spenders in the United States.

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One example of this is our newest offering—**Commercial Insights** by American Express. We have heard from you that you want more than data. You want actionable insights that drive internal T&E policy compliance, generate savings and improve your travelers' experience. For example, did you know that just 2% of the Card Members generate about 80% of questionable spend? Through customizable insights and benchmarking, Commercial Insights can generate quantifiable savings for your company.

All of us at American Express look forward to partnering with you on your company's travel management journey. Reach out with any questions or just to say hello—I'd love to hear from you!

Sincerely,

Lisa Marks
Senior Vice President / General Manager
Global Business Development
American Express



Travel Partners,

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Marriott International has a global presence of 6,700 properties and 30 brands in more than 127 countries and territories. Our portfolio offers solutions for almost every travel need, price point, and purpose. We remain focused on seeking your feedback through customer events, focus groups, and advisory boards. Our goal is to be your favorite hotel company, and we are committed to working hard to earn your business.

Marriott International is proud to be a sponsor of this issue of Business Travel News, and hope you find the tools and resources helpful.

Warmly,

Tammy Routh
Senior Vice President, Global Sales
Marriott International



Dear Clients and Business Partners,

United is proud to sponsor the 2018 Corporate Travel 100, the preeminent study of business travel trends and the companies leading the way. Thanks to BTN for continued thought leadership in the corporate travel space, and for the research that demonstrates the remarkable health and continued growth of our industry.

It's an exciting time to be a business traveler. At no period in recent memory have air carriers been so intensely focused on elevating the corporate travel experience, both the tangible product and the rewards that come with a preferred airline relationship. Nowhere is this more evident than at United.

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Sincerely,

Jake Cefolia
Senior Vice President-Worldwide Sales
United Airlines

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RANKED BY 2017 U.S.-BOOKED AIR VOLUME

	RANKING		RANKING	
\$495.1M	Deloitte	1	\$80M Goldman Sachs	50
\$430M	IBM	2	\$79M Intel	52
\$317.6M	PwC	3	\$78.7M International Monetary Fund	53
\$280.7M	EY	4	\$73.7M Toyota Motor North America	54
\$275M	Apple	5	\$73M Honeywell	55
\$248M	McKinsey & Co.	6	\$72M Koch	56
\$243M	Accenture	7	\$71.4M Chevron	57
\$227M	Boeing	8	\$71M UnitedHealth Group	58
\$224M	Microsoft	9	\$70M Walmart	59
\$203.6M	Lockheed Martin	10	\$67M UBS	60
\$201M	Cisco	11	\$65M Credit Suisse	61
\$200M	Amazon	12	\$65M L3 Technologies	61
\$200M	GE	12	\$64M Allergan	63
\$185M	The World Bank	14	\$64M Morgan Stanley	63
\$180M	ExxonMobil	15	\$63M Schlumberger	65
\$178M	Google	16	\$62.5M Bayer	66
\$175M	Bank of America	17	\$61M Omnicom Group	67
\$170M	JPMorgan Chase & Co.	18	\$60M P&G	68
\$162M	KPMG LLP	19	\$58.1M Epic Systems	69
\$151.5M	Roche	20	\$58M Cognizant	70
\$147M	Siemens	21	\$57.2M 21st Century Fox	71
\$146M	BCG	22	\$57.2M IPG	71
\$144M	FedEx	23	\$57M Shire	73
\$138M	Oracle	24	\$56.8M Amgen	74
\$136.6M	Johnson & Johnson	25	\$55.6M Marsh & McLennan Cos.	75
\$130M	Wells Fargo	26	\$55M Airbus Group	76
\$128M	Comcast	27	\$55M Allstate	76
\$120M	Citi	28	\$55M Salesforce	76
\$117M	DellEMC	29	\$54M BP	79
\$117M	Raytheon	29	\$53M Pepsico	80
\$116M	Walt Disney	31	\$52.5M Samsung	81
\$113M	Facebook	32	\$52M Danaher	82
\$111M	United Technologies	33	\$52M Stryker	82
\$104M	Sanofi	34	\$51M Daimler	84
\$103M	Northrop Grumman	35	\$51M ITW	84
\$102M	Pfizer	36	\$51M Johnson Controls	84
\$100M	DowDuPont	37	\$50.6M Boston Scientific	87
\$100M	Medtronic	37	\$50M 3M	88
\$100M	Royal Dutch Shell	37	\$50M Lilly	88
\$100M	SAP	37	\$49M Barclays	90
\$99.6M	Merck	41	\$49M Coca-Cola	90
\$99M	Abbott	42	\$49M Viacom	90
\$94M	AbbVie	43	\$48.2M Aon	93
\$94M	Time Warner	43	\$48M WPP	94
\$93M	The Church of Jesus Christ of Latter-Day Saints	45	\$46M Verizon	95
\$90M	Novartis	46	\$45.8M Publicis Groupe	96
\$88M	Nike	47	\$45M Deutsche Bank	97
\$87M	General Motors	48	\$44.4M Caterpillar	98
\$82M	GSK	49	\$44.4M Hewlett Packard Enterprise	98
\$80M	General Dynamics	50	\$43M BAE Systems	100

ALPHABETIZED

	RANKING		RANKING
3M	88	International Monetary Fund	53
21st Century Fox	71	IPG	71
Abbott	42	ITW	84
AbbVie	43	Johnson & Johnson	25
Accenture	7	Johnson Controls	84
Airbus Group	76	JPMorgan Chase & Co.	18
Allergan	63	Koch	56
Allstate	76	KPMG LLP	19
Amazon	12	L3 Technologies	61
Amgen	74	Lilly	88
Aon	93	Lockheed Martin	10
Apple	5	Marsh & McLennan Cos.	75
BAE Systems	100	McKinsey & Co.	6
Bank of America	17	Medtronic	37
Barclays	90	Merck	41
Bayer	66	Microsoft	9
BCG	22	Morgan Stanley	63
Boeing	8	Nike	47
Boston Scientific	87	Northrop Grumman	35
BP	79	Novartis	46
Caterpillar	98	Omnicom Group	67
Chevron	57	Oracle	24
The Church of Jesus Christ of Latter-Day Saints	45	P&G	68
Cisco	11	Pepsico	80
Citi	28	Pfizer	36
Coca-Cola	90	Publicis Groupe	96
Cognizant	70	PwC	3
Comcast	27	Raytheon	29
Credit Suisse	61	Roche	20
Daimler	84	Royal Dutch Shell	37
Danaher	82	Salesforce	76
DellEMC	29	Samsung	81
Deloitte	1	Sanofi	34
Deutsche Bank	97	SAP	37
DowDuPont	37	Schlumberger	65
Epic Systems	69	Shire	73
ExxonMobil	15	Siemens	21
EY	4	Stryker	82
Facebook	32	Time Warner	43
FedEx	23	Toyota Motor North America	54
GE	12	UBS	60
General Dynamics	50	United Technologies	33
General Motors	48	UnitedHealth Group	58
Goldman Sachs	50	Verizon	95
Google	16	Viacom	90
GSK	49	Walmart	59
Hewlett Packard Enterprise	98	Walt Disney	31
Honeywell	55	Wells Fargo	26
IBM	2	The World Bank	14
Intel	52	WPP	94



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1 DELOITTE NEW YORK CITY

2017 U.S.-Booked Air Volume: \$495.1 million
2017 Global Air Volume: \$618.8 million
2017 U.S. T&E: \$1.6 billion
Principal Air Suppliers: American, Delta & United
Principal Hotel Suppliers: Hilton, Hyatt & Marriott
Principal Car Rental Suppliers: Avis & Budget
Principal U.S. Online Booking Tool: GetThere
Principal U.S. Expense Supplier: SAP with a custom interface
Principal Payment Supplier: American Express
Consolidated U.S. TMC: BCD Travel
Primary Non-U.S. TMCs: BCD, CWT & HRG

In 2017, Deloitte created a global procurement team that consolidated procurement and contracting across 10 countries; that group then completed the company's global airline and hotel sourcing initiatives. Deloitte achieved a company-record month of 74 percent online adoption last year. It also implemented an automated airfare price assurance program and strengthened its pretrip review and approval processes.

For 2018, Deloitte will focus on cost reduction but again this year does not plan to change its travel policy, which varies by country. It also will bring more countries into the managed travel program, increase the automation of its rate/fare optimization efforts and increase online and mobile adoption while improving the traveler experience.

Of the 2017 U.S.-booked volume among the Deloitte U.S. Firms, 72 percent was for domestic travel. Ninety-eight percent was booked via approved channels. Deloitte has an individual bill/central pay card program.

2 IBM ARMONK, N.Y.

2017 U.S.-Booked Air Volume: \$430 million
Principal Air Suppliers: American & Delta
Principal Hotel Suppliers: Hilton & Marriott
Principal Car Rental Suppliers: Avis & Hertz
Principal Online Booking Tool: Concur
Principal Payment Supplier: American Express
Principal Expense Supplier: Concur
Consolidated Global TMC: Amex GBT

BTN estimates that IBM's U.S.-booked air volume decreased by \$35 million in 2017, reflecting reduced travel volumes. In doing so, the technology and consulting heavyweight, with nearly \$2 billion in global T&E last year, continued to slip from its position as the largest corporate buyer of U.S.-booked air travel. It gave up that spot last year for the first time in the 30-year history of the CT 100. IBM signed a global deal in 2016 to combine T&E under Concur. IBM's use of the Orbitz for Business tool came to a complete stop on Dec. 1, 2016, and by year-end, IBM had rolled out Concur in 33 countries. The company launched Concur T&E in the U.S. in May 2017. By January 2018, it had rolled out Concur Travel to all 99 countries where IBM manages travel and Concur Expense to 103 countries. IBM also introduced an internal social network, Travel@IBM.

Last year, IBM created IBM Travel Manager, a cognitive data and analytics platform that integrates data from various sources for end-to-end visibility and that conducts real-time, what-if analytics and trending

alerts to identify patterns. IBM Travel Manager rolled out to business managers internally in 2017 and is available to 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 survey to benchmark and establish policy parameters. The company is focusing on the traveler experience through a mobile app that provides basic itinerary information and innovative features like curated feeds and a personal concierge, customized to IBM's environment. The travel team will pilot a minimum viable product version of a mobile app in the third quarter of 2018 and will make it available to IBM customers shortly thereafter.

3 PWC NEW YORK CITY

2017 U.S.-Booked Air Volume: \$317.6 million
Principal Payment Supplier: American Express
Consolidated U.S. TMC: Amex GBT

In 2017, PwC's U.S.-booked air volume rose by \$2.5 million to \$317.6 million. The company increased online adoption of its booking tool in 2017. PwC has a single U.S. travel policy but not a single global travel policy. PwC has an individual bill/central pay corporate card program provided mainly by American Express. Amex GBT handled 100 percent of its U.S.-booked air volume in 2017.

4 EY LONDON

2017 U.S.-Booked Air Volume: \$280.7 million
2017 Global Air Volume: \$520.5 million
2017 U.S. T&E: \$807 million
2017 Global T&E: \$1.7 billion
Principal Air Suppliers: Delta, United & American
Principal Hotel Suppliers: Marriott, Hilton & AccorHotels
Principal Car Rental Suppliers: National & Hertz
Principal Global Booking Tool: GetThere
Principal Expense Supplier: Proprietary system
Principal Payment Supplier: American Express
Consolidated U.S. TMC: Amex GBT
Primary Non-U.S. TMCs: CWT & HRG

EY's U.S.-booked air volume for the 2017 fiscal year, which ended June 30, increased 8.5 percent. Its 2017 global air volume dipped 1.6 percent.

The professional services and Big Four accounting firm in 2017 launched a modified fully dynamic hotel program that dramatically reduced the time span of its RFP process and enabled EY's travel team to tackle new initiatives; BTN named EY global head of meetings, travel and events Karen Hutchings the 2018 Travel Manager of the Year for that work. The firm also launched mobile booking platforms and an internal hotel advisory platform, EY Lobby, and built an internal approval platform. The firm maintained its existing travel policy.

The tools developed by EY's travel team have been turned into a client offering, the EY Travel Innovation Portfolio, that will be available to EY clients this year.

EY employs approximately 260,000 people in more than 150 countries. Eighty-seven percent of 2017 U.S.-air bookings were made using approved online tools; 83 percent of those were booked without an agent. Domestic travel accounted for 73 percent of EY's U.S.-booked air volume.

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5 APPLE CUPERTINO, CALIF.

2017 U.S.-Booked Air Volume: \$275 million
Consolidated U.S. TMC: BCD

BTN estimates that tech giant Apple's 2017 U.S.-booked air volume increased about 8 percent from 2016. Apple's net sales for its 2017 fiscal year, which ended Sept. 30, 2017, totaled about \$229.2 billion, up more than 6 percent year over year. The company had approximately 123,000 full-time equivalent employees at the end of that fiscal year, up from about 116,000 one year prior. Apple's business air travel and rental car use generated about 121,000 metric tons of carbon dioxide equivalent in fiscal year 2017, up from about 117,500 the year before. Apple continues to partner with CWT Meetings & Events for some meetings management services.

6 MCKINSEY & CO. NEW YORK CITY

2017 U.S.-Booked Air Volume: \$248 million
Consolidated U.S. TMC: Amex GBT

Privately held management consulting giant McKinsey & Co. spent about \$8 million more on U.S.-booked air travel in 2017 than the year prior, according to a BTN estimate. Revenue reached \$10 billion, according to the Financial Times, up from about \$8.8 billion in 2016. The firm has more than 28,000 employees, about 14,000 of whom are consultants, an increase of about 2,000 consultants from 2016. McKinsey has deployed videoconferencing equipment on a widespread basis to avoid what it deems unnecessary travel.

7 ACCENTURE DUBLIN

2017 U.S.-Booked Air Volume: \$243 million
2017 Global Air Volume: \$568 million
2017 U.S. T&E: \$644 million
2017 Global T&E: \$1.4 billion
Principal Air Suppliers: American, United & Delta
Principal Hotel Suppliers: Marriott, Hilton & InterContinental
Principal Car Rental Suppliers: Hertz & Avis
Principal Global Online Booking Tool: GetThere
Principal Global Expense Supplier: MyTE internal system
Principal Payment Supplier: American Express
Consolidated Global TMC: CWT

In 2017, Accenture onboarded companies it acquired into its global travel program, integrated an Uber custom expense function within its MyTE system and deployed airfare and hotel rate tracking tools. It also adjusted its travel policy to allow employees to book Airbnb in specific countries. Accenture's single global travel policy provides a corporate card to travelers, who must pay it individually. To provide afterhours support, Accenture established a dedicated service center for U.S. travelers and plans to expand globally in 2018. Other 2018 plans include cutting costs through operational efficiencies, enhancing air expense controls and its

travel data analytics capability, maximizing use of credits and unused tickets, working on General Data Protection Regulation compliance and reinforcing its contractor travel policy. In 2017, 73 percent of Accenture's U.S.-booked air volume was domestic. Ninety-four percent of 2017 U.S.-booked air volume was made through the company's approved online tools, 91 percent of those requiring no agent assistance. In 2017 Accenture decreased U.S.-booked air volume costs by \$1 million and expects it to fall another \$3 million in 2018.

8 BOEING CHICAGO

2017 U.S.-Booked Air Volume: \$227 million

Aircraft manufacturer and defense contractor Boeing's U.S.-booked air spend increased by just under 4 percent in 2017. Boeing operates an Airlines Reporting Corp.-accredited Corporate Travel Department. In recent years, the company has implemented and updated agency robotic process automation tools for the CTD. Company employees in the U.K. in 2017 increased their use of remote conferencing options including videoconferencing, along with ridehailing and public and alternative transportation, helping to reduce business travel mileage by more than 25 percent. Boeing's 2017 revenue declined about 1 percent to \$93.4 billion. The company at the end of 2017 employed about 140,800 in more than 65 countries, including the U.S., down from about 150,500 one year prior.

9 MICROSOFT REDMOND, WASH.

2017 U.S.-Booked Air Volume: \$226 million
2017 Global Air Volume: \$430 million
2017 U.S. T&E: \$450 million
2017 Global T&E: \$950 million
Principal Air Supplier: Delta
Principal Hotel Suppliers: Marriott, Hilton & Hyatt
Principal Car Rental Suppliers: Avis, Hertz & Enterprise
Principal Online Booking Tool: Concur
Principal Expense Supplier: Microsoft Dynamics
Principal Payment Supplier: American Express
Consolidated Global TMC: Amex GBT

Microsoft's business travel volume has just returned to the peak volumes reached in 2008, even as large increases in headcount nearly doubled revenue. Microsoft has increased use of its Roadmap app and Tripism to nearly 20,000 users each in 2018 and further developed its machine learning-based "persona" strategy to personalize communications and offers to travelers.

10 LOCKHEED MARTIN BETHESDA, MD.

2017 U.S.-Booked Air Volume: \$203.6 million
2017 Global Air Volume: \$220.5 million

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SUITES

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2017 U.S. T&E: \$389.7 million

2017 Global T&E: \$410 million

Principal Air Suppliers: American, United & Delta

Principal Hotel Suppliers: Marriott, Hilton & InterContinental

Principal Car Rental Supplier: Avis Budget Group

Principal Global Online Booking Tool: Concur

Principal Global Expense Supplier: Concur

Principal Payment Supplier: US Bank Visa

Consolidated Global TMC: BCD

In 2017, Lockheed Martin brought additional countries into its managed travel program. In 2018, the aerospace and defense contractor completed the global implementation of Concur Travel & Expense and updated its travel policy to streamline across all business areas, including the documentation it requires for Federal Acquisition Regulation exceptions. Lockheed Martin has worked with SAP Concur to meet the unique needs of aerospace and defense companies: flagging flight bookings that could violate the Fly America Act, enabling booking profiles for temporary travelers like job applicants and subcontractors and supporting compliance with the requirements of the Defense Contract Audit Agency.

Lockheed Martin's annual revenue rose \$3.9 billion in 2017 to \$51.1 billion, while annual U.S.-booked air volume rose just \$700,000. The company estimates its U.S.-booked air volume will decline by \$2.6 million in 2018 to \$201 million. Of the company's 2017 U.S.-booked dollar volume, 52 percent was for international travel. The percentage of airline tickets that were made through the organization's approved online tools was 85 percent, and 98 percent of those were transacted without the assistance of an agent. Lockheed Martin has a single travel policy around the globe. The company's card program is configured as individual bill/individual pay.

11 CISCO SAN JOSE, CALIF.

2017 U.S.-Booked Air Volume: \$201 million

Technology conglomerate Cisco in 2017 spent slightly less on U.S.-booked air volume than it did in 2016, according to a BTN estimate. Company revenue for its 2017 fiscal year, which ended July 29, 2017, declined about 2.5 percent year over year to \$48 billion.

Cisco operates mature travel and strategic meetings management programs and in recent years notably shifted its hotel procurement philosophy, agreeing to multiyear deals with large hotel companies that provide lower room rates in exchange for hotel revenue generated instead of room-night commitments. The company in recent years also began to offer its travelers mobile booking capabilities and online training.

Cisco requires all company meetings to be registered in its online events portal. The company employs an SMM team and outsources many aspects of meeting planning and production. Of the roughly 11,000 meetings registered with Cisco's events portal in 2017, the meetings management team secured planning services for about 4,000.

In fiscal year 2017, the company reduced its carbon emissions related to business air travel by less than 4 percent to 177,210 metric tons of carbon dioxide equivalent. Cisco in fiscal year 2012 set a goal to cut such emissions 40 percent by fiscal year 2017 from a fiscal year 2007 baseline. That didn't happen, with

emissions registering about 11 percent lower than 2007 figures, largely due to an increase in global sales activity and the number of Cisco employees.

Cisco leans on its own remote conferencing products to help limit business air travel. The company has deployed more than 1,500 of its TelePresence immersive videoconferencing rooms at its offices throughout the world, and Webex desktop conferencing is available to all employees with company laptops, among other collaboration solutions.

The company had about 72,900 employees in July 2017, slightly less than the 73,700 reported one year earlier.

12 AMAZON SEATTLE

2017 U.S.-Booked Air Volume: \$200 million

Consolidated U.S. TMC: CWT

Amazon increased its U.S.-booked air volume by 20 percent to \$200 million. The e-commerce giant has a single global travel policy covering the approximately 566,000 full- and part-timers it employed as of Dec. 31, 2017. It generated \$177.9 billion in net sales in 2017.

12 GE BOSTON

2017 U.S.-Booked Air Volume: \$200 million

Principal Online Booking Tool: GetThere

Principal Payment Supplier: American Express

Principal Expense Supplier: Concur

Consolidated Global TMC: CWT

GE's U.S.-booked air volume dropped by a third in 2017. Last year, it introduced an internal mobile app that gives employees' managers and business unit leaders insights into their travel spend. The app notifies an employee's manager when he or she books travel, and business unit leaders can use the app to look for ways to cut travel costs and optimize travel spend. Also in 2017, the company completed its acquisition of oil and gas firm Baker Hughes. It also plans to redouble its focus on China, India and emerging markets like Southeast Asia, the Middle East and Africa. Revenue fell 1 percent in 2017 to \$122.1 billion.

14 THE WORLD BANK WASHINGTON D.C.

2017 U.S.-Booked Air Volume: \$185 million

2017 Global Air Volume: \$270 million

2017 U.S. T&E: \$230 million

2017 Global T&E: \$462 million

Principal Air Suppliers: United joint venture, Delta JV & Qatar Airways

Principal Hotel Suppliers: Independent hotels, Marriott & Hilton

Principal U.S. Online Booking Tool: e-Travel Management



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Principal Non-U.S. Online Booking Tool: GetThere
Principal Global Expense Supplier: SAP
Principal Payment Supplier: Diners Club Mastercard
Consolidated U.S. TMC: Amex GBT
Primary Non-U.S. TMCs: Amex GBT, BCD, HRG & SOTC
Travel (India)

In 2017, The World Bank, a global partnership of five institutions that finances initiatives to reduce poverty and increase shared prosperity around the world, completed a rapid, three-year global rollout of its meetings management program, mandated for meetings with a budget of \$10,000 or more. The World Bank's mission, diverse markets and evolving needs make its meetings program—more than 650 managed events in the past year—hard to streamline; events are not typically annual or recurring. Master service agreements had been the norm for the organization's North America meetings, but World Bank couldn't scale that practice globally, and so it opted for a less common portfolio-driven sourcing strategy.

The program encourages use of conference spaces in the 130 locations it operates in 189 countries, and the program outsources other venue sourcing. Individual meeting planners handle logistics with the venues, payment goes through a meetings card, and Cvent collects data. All meeting requests cycle through the security department, which conducts a risks and hazards assessment. The organization also is implementing a program it has branded "event services on demand" that includes ground transportation and translation services.

Also, in 2017, The World Bank stabilized the first 80 countries in its global consolidation of travel management companies. It has started Phase 2 of the global TMC consolidation, expecting to cover another 85 countries by end of 2019. In addition, the organization concluded its North America TMC RFP in 2018, reappointing American Express Global Business Travel as its TMC. It also is changing its principal payment supplier to Citi in 2018. The World Bank saw its U.S.-booked air volume increase \$8 million in 2017 and expects its U.S.-booked air volume to dip to \$180 million in 2018. Ninety-three percent of the 2017 U.S.-booked air volume was for international travel. Only four percent of U.S.-booked airline tickets were processed through the institution's approved online booking channels. All others were done via the contracted travel agent in compliance with The World Bank's single global travel policy and central bill/central pay card program.

15 EXXONMOBIL

IRVING, TEXAS

2017 U.S.-Booked Air Volume: \$180 million
Consolidated Global TMC: CWT

As oil prices in 2017 rebounded somewhat from 2016's bottom, so too did oil and gas giant ExxonMobil's financial performance. Still, BTN estimates it spent only about \$1 million more on U.S.-booked air travel than it had in 2016. ExxonMobil's sales and other operating revenue increased more than 18 percent in 2017 to \$237.1 billion. Selling, general and administrative expenses increased less than 2 percent to nearly \$11 billion. The company had about 69,600 employees at the end of 2017, down about 2 percent from a year earlier.

16 GOOGLE

MOUNTAIN VIEW, CALIF.

2017 U.S.-Booked Air Volume: \$178 million
Consolidated Global TMC: CWT

In 2017, technology behemoth Google for the fourth straight year increased its U.S.-booked air spend by a double-digit percentage. In 2017, the increase was 12 percent. Google's business continues to grow rapidly, as revenue for parent company Alphabet increased nearly 23 percent in 2017 to almost \$110.9 billion. Sales and marketing expenses increased 23 percent to \$12.9 billion, while general and administrative costs decreased less than 2 percent to \$6.9 billion. Google's business travel via aircraft, rail and rental car generated nearly 202,400 metric tons of carbon dioxide equivalent in 2016, the most recent year for which data is available, a 13.2 percent increase from 2015. The company for several years has operated a travel management structure without a booking channel mandate, instead offering travelers a budget and allowing them to arrange their trips and retain any remaining funds to book over budget for future business trips.

17 BANK OF AMERICA

CHARLOTTE

2017 U.S.-Booked Air Volume: \$175 million
Consolidated U.S. TMC: Amex GBT

Bank of America's spending on U.S.-booked air travel may have increased by about 4 percent in 2017 according to a BTN estimate, but the banking giant nevertheless has worked to tamp down travel expenses by significantly increasing its use of remote conferencing. Company employees in 2017 conducted 434,700 videoconferencing calls, over 15 percent more than in 2016. Bank of America's greenhouse gas emissions related to air travel, hotel stays and rental car use dropped by nearly 6 percent year over year to 154,500 metric tons of carbon dioxide equivalent. The bank in 2017 tallied about \$87.4 billion in total revenue, a 4.4 percent increase from 2016. The company had about 209,000 employees at the end of 2017, up about 1,000 from a year prior.

18 JPMORGAN CHASE & CO.

NEW YORK CITY

2017 U.S.-Booked Air Volume: \$170 million
2017 Global Air Volume: \$332 million
2017 U.S. T&E: \$420 million
2017 Global T&E: \$725 million

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

Principal Hotel Suppliers: Hilton, Marriott, Hyatt & InterContinental

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

Principal Online Booking Tool: GetThere

Principal Payment Supplier: JPMorgan Chase

Principal Expense Supplier: Concur

Consolidated Global TMC: CWT

JPMorgan Chase & Co.'s revenue increased 4 percent year over year in 2017 to \$99.6 billion. U.S.-booked air volume grew at a faster 8 percent,

United Airlines

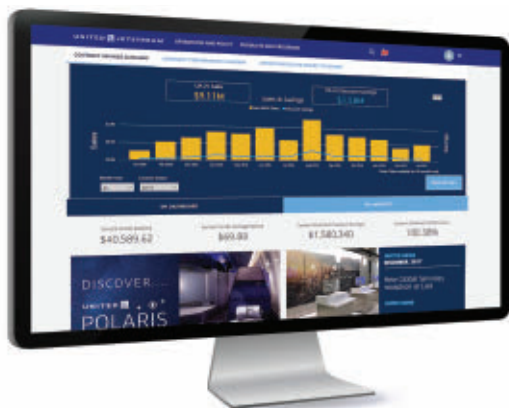
Every day we have the privilege of helping unite the world by connecting people to the moments that matter most—and we know that getting your travelers where they need to be safely, comfortably and on time is of paramount importance. In 2017 we were honored to fly more than 148 million customers while achieving the most on-time departures and the fewest cancellations in our history.

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though U.S. T&E fell \$10 million to \$430 million. Global air volume rose \$27 million, and global T&E decreased \$5 million. The bank employed 252,539 people globally in 2017. For the second time in two years, it will raise wages; this time, wages for the 22,000 employees making between \$12 and \$16.50 an hour will rise to between \$15 and \$18, depending on their local cost of living. The bank plans to expand its consumer branch business into U.S. cities like Boston, Philadelphia and Washington, D.C. It also plans to build as many as 400 branches in 15 to 20 new international markets and hire as many as 4,000 employees over the next five years. The bank is prepared to move between 300 and 400 jobs around Europe in the event the U.K. conducts a hard exit from the European Union.

19 KPMG LLP NEW YORK CITY

2017 U.S.-Booked Air Volume: \$162 million
2017 U.S. T&E: \$541 million
Principal Air Suppliers: American, Delta, United & Southwest
Principal Hotel Suppliers: Marriott, Hilton & Hyatt
Principal Car Rental Suppliers: Hertz & Avis
Principal U.S. Online Booking Tool: GetThere
Principal U.S. Expense Supplier: SAP Concur
Principal Payment Supplier: Diners Club Mastercard
Consolidated U.S. TMC: Amex GBT

Global tax and advisory network KPMG had \$162 million in U.S.-booked air volume in 2017, down from \$174 million in 2016. The company expects that volume to jump back up to \$170 million in 2018. Seventy-five percent of U.S.-booked air volume was for domestic travel. Of KPMG's U.S.-booked airline tickets, 77 percent were made through the company's approved online channels, and 80 percent of those were touchless. In 2017, the company took a data-driven approach to analyzing traveler behavior and used that analysis to refresh policy. That process continues through 2018. The company does not have a global policy but does have a single policy for the U.S. KPMG's corporate card program is individual bill/central pay. The company's 2017 revenue was \$7 billion.

20 ROGHE BASEL, SWITZERLAND

2017 U.S.-Booked Air Volume: \$151.5 million
2017 Global Air Volume: \$355 million
2017 U.S. T&E: \$480 million
2017 Global T&E: \$680 million
Principal Air Suppliers: United, American & Delta
Principal Hotel Suppliers: Marriott & Hilton
Principal Car Rental Suppliers: National & Avis
Principal U.S. Online Booking Tool: GetThere
Principal U.S. Expense Supplier: Concur
Principal Non-U.S. Expense Supplier: SAP
Principal Payment Supplier: Citi
Consolidated U.S. TMC: BCD Travel
Primary Non-U.S. TMCs: HRG & CWT

Pharmaceutical, medical and healthcare Roche had \$151.5 million in U.S.-booked air volume in 2017, up from \$149.2 million in 2016. Roche

predicts U.S.-booked air volume will dip back to \$149 million in 2018. Of the total U.S.-booked air volume, 33 percent was for travel in the U.S.; 67 percent was international. Nearly three-quarters of its total U.S.-booked volume was transacted through approved online tools, and 90 percent of that was touchless. Roche has a single global travel policy and a central bill/central pay card program. Global T&E rose 39 percent in 2017, and global air volume rose 19 percent. Roche focused on global travel policy alignment in 2017; it also added language around corporate card usage requirements and the use of sharing economy providers. The company pursued more consolidation and better internal business alignment for travel. It also implemented a data consolidation and analytics tool.

21 SIEMENS MUNICH

2017 U.S.-Booked Air Volume: \$147 million
Consolidated U.S. TMC: BCD

BTN estimates U.S.-booked air spending at industrial manufacturing conglomerate Siemens increased about 9 percent during its 2017 fiscal year, which ended Sept. 30, 2017.

Siemens in 2018 has begun to migrate its subsidiaries and entities in the U.S. and Canada to its new E2E Travel@Siemens technology platform from the previous Siemens Personal Assistant and in-house expense platforms. E2E Tracel@Siemens integrated Concur Travel and Expense functionality.

The company this year also completed an RFP for management of its global hotel program and awarded the business to HRS, which will manage all business processes worldwide related to the hotel program, including negotiations, rate loading and rate auditing.

In September 2016, Siemens debuted a global travel policy framework, which includes requirements for country-specific policy development. In the framework, pretrip approval requirements are eliminated. In the U.S., Siemens no longer requires receipts to be reimbursed for air, hotel or car rental expenses. It also no longer requires receipts for cash purchases under \$25 and corporate card charges under \$75.

Siemens' business travel in its 2017 fiscal year generated about 411,000 metric tons of carbon dioxide equivalent emissions, compared with about 380,000 metric tons in fiscal 2016. Revenue increased about 4 percent in fiscal year 2017 to about \$83 billion. On Sept. 30, 2017, Siemens employed about 377,000 people worldwide, up from about 351,000 one year prior.

22 BCG BOSTON

2017 U.S.-Booked Air Volume: \$146 million
Consolidated U.S. TMC: Amex GBT

BTN estimates that U.S.-booked air travel spend at privately held management consulting firm BCG increased about 8 percent in 2017. BCG reported that 2017 sales increased 11 percent to \$6.3 billion. Employees increased from 14,000 in 2016 to 16,000 last year, and the firm claims offices in more than 90 cities in 50 countries. All BCG travelers have access to a company mobile itinerary management app, designed by BCG and based on Amadeus' mobile platform.

Marriott International

A new era is beginning for the more than 110 million members of Marriott International's award-winning loyalty programs—Marriott Rewards®, The Ritz-Carlton Rewards®, and Starwood Preferred Guest® (SPG®). For the first time since Marriott acquired Starwood Hotels and Resorts in 2016, the programs now operate under one set of unified benefits and one currency spanning the entire loyalty portfolio of 29 brands and more than 6,700 participating hotels in 127 countries and territories.

Members are able to seamlessly earn and redeem across the entire loyalty portfolio and achieve Elite status faster with new Elite tiers. Members can now combine their separate program accounts into one at Marriott.com or SPG.com to take advantage of everything Marriott's loyalty programs offer worldwide.

Book Stays on Web, App or Call

Together, the unified programs are richer. Members now earn on average 20 percent more points per dollar spent and have their Elite status recognized consistently at every hotel. Additionally, members now have the added convenience to book stays throughout the portfolio on Marriott.com, SPG.com, and the Marriott and SPG apps, or by contacting customer engagement centers.

"This is an exciting time for our loyalty members who now have endless inspiration to travel and experience the world to create memories that will last a lifetime," said David Flueck, Senior Vice President, Global Loyalty, Marriott International. "We merged the incredible earning and redeeming power of Marriott Rewards with the phenomenal Elite benefits of SPG to create one of the richest travel loyalty programs with the most extraordinary global portfolio of hotels—from overwater bungalows, to mountain-side ski resorts, to iconic urban landmarks."



Renaissance Newport Beach Hotel



The Westin Nashville

Earn Points and Achieve Elite Status Faster

Under the unified programs, members now earn Silver Elite status after just 10 nights annually, Gold Elite status after just 25 nights, Platinum Elite status after 50 nights and Platinum Premier Elite status after 75 nights. All Platinum Premier members surpassing 100 nights and \$20,000 annual spend will enjoy the highest level of personalized service—the popular ambassador program—along with all the other benefits in that tier. Members who have achieved Lifetime status will continue to have their status recognized under the new Lifetime Elite tiers that will apply across the unified programs.

More Benefits

In addition, other new benefits to highlight include:

- All members now earn points for food and beverage, spa and other qualifying incidentals charged to their folio, rather than just the room rate.
- Hotels throughout the loyalty portfolio now have no blackout dates for points redemptions.
- Booking direct on any of Marriott's digital and mobile channels means members can take advantage of exclusive member-only rates and free Wi-Fi. In addition, both the Marriott and SPG apps offer mobile check-in and check-out and send members alerts when their room is ready. Members can also chat directly with hotel associates before, during, and after their stays using Mobile Requests, and use their smartphones as their room key at more than 1,000 hotels.

Marriott
INTERNATIONAL

Combine accounts or learn more about unified program benefits at Marriott.com, SPG.com or RitzCarlton.com

23 FEDEX MEMPHIS

2017 U.S.-Booked Air Volume: \$144 million
Consolidated U.S. TMC: BCD

According to a BTN estimate, global delivery services firm FedEx increased its U.S.-booked air travel spend by about 5 percent in 2017. FedEx for its 2018 fiscal year, which ended May 31, 2018, reported about \$65.5 billion in revenue, up about 8.5 percent year over year. Operating expenses increased 9.6 percent to \$60.6 billion. In its 2017 fiscal year, the company generated about 71,400 metric tons of carbon dioxide equivalent via its business air travel and rental car use, a figure that increased nearly 12 percent from the prior fiscal year. That figure does not include emissions from the company's delivery services. The company on May 31, 2018, had more than 425,000 employees, up from 400,000 one year earlier.

24 ORACLE REDWOOD SHORES, CALIF.

2017 U.S.-Booked Air Volume: \$138 million
Principal Online Booking Tool: GetThere
Principal Expense Supplier: Oracle Internet Expenses
Principal Payment Supplier: American Express
Consolidated Global TMC: CWT

BTN estimates that Oracle reduced its U.S.-point-of-sale air spend by \$37 million in 2017, following a similar reduction the previous year. Oracle worked to help travelers be more productive and drive satisfaction with all parts of the managed travel program last year. It continued efforts to improve travelers' compliance with its lowest logical airfare policies. It also implemented dynamic pricing hotel agreements for certain brands and continued a data-consolidation project. This year, Oracle is reviewing its policy on premium economy airfares and other airline fare offerings. The company also is focused on meetings management technology, employee engagement with its online booking tool and other technologies and communications, and creating a program to monitor compliance with preferred suppliers and policies. Oracle also is creating an internal pilot group to garner feedback on ideas and solutions.

25 JOHNSON & JOHNSON NEW BRUNSWICK, N.J.

2017 U.S.-Booked Air Volume: \$136.6 million
Principal Air Suppliers: United & Delta
Principal Hotel Suppliers: Marriott, Hilton & Hyatt
Principal Car Rental Supplier: Avis
Principal Online Booking Tool: Concur
Principal Expense Supplier: Concur
Principal Payment Supplier: American Express
Consolidated Global TMC: Amex GBT

In 2017, Johnson & Johnson continued its global rollout of Concur online booking and expense; standardizing the tools in 17 countries. The company consolidated its transient travel procurement with its global team, expanded service center operations to additional countries in Europe and doubled down on spend optimization. The company realized a 3 percent decrease in U.S.-booked economy average segment cost. For 2018, the multinational consumer goods, medical device and pharmaceutical company will source

and implement new air and hotel programs and demand management strategies and integrate recent corporate acquisitions into the Johnson & Johnson travel program. Its U.S.-booked air volume decreased \$10.9 million in 2017. The company expects it to tick up to \$150 million in 2018. Revenue for the company was \$76.5 billion in 2017.

26 WELLS FARGO SAN FRANCISCO

2017 U.S.-Booked Air Volume: \$130 million
2017 Global T&E: \$687 million
Consolidated Global TMC: HRG

Financial services and banking firm Wells Fargo is in the midst of a companywide cost-containment effort, and it is seeing the results of that effort in its travel spend. BTN estimates its U.S.-booked air travel spend declined more than 20 percent in 2017. That decline tracks with drops in other travel spend, as well. Wells Fargo spent about \$704 million companywide on travel and entertainment in 2016, and that figure dropped to \$687 million in 2017. The carbon dioxide equivalent produced by Wells Fargo's business air travel declined by almost 12 percent in 2017 to 96,950 metric tons.

The company's travel policy now reflects its drive to contain costs. It recently introduced pretrip approval requirements for certain types of high-cost or international travel and for bookings with air carriers and hotels outside Wells Fargo's roster of preferred suppliers. Further actions to reduce travel are expected.

Wells Fargo in 2017 recorded \$88.4 billion in revenue, up slightly from \$88.3 billion one year earlier. The company at the end of 2017 had 262,700 full-time equivalent employees, down from 269,100 on year prior. Wells Fargo's preferred global travel management company, HRG Worldwide, was purchased by American Express Global Business Travel in 2018.

27 COMCAST PHILADELPHIA

2017 U.S.-Booked Air Volume: \$128 million
Consolidated Global TMC: BCD

BTN estimates that media conglomerate Comcast—which owns NBC-Universal, Xfinity cable and DreamWorks Animation—increased its U.S.-booked air travel spend by about 2 percent in 2017. Revenue increased about 5 percent to \$84.5 billion. Operating and administrative expenses, outside of programming and production costs, increased about 7 percent to \$25 billion. The company at year-end 2017 had about 164,000 full-time and part-time employees, up from 159,000 a year earlier. On Sept. 22, 2018, Comcast, with a bid worth \$39 billion, beat Fox in an auction to buy a majority stake in London-based pay-TV company Sky.

28 CITI NEW YORK CITY

2017 U.S.-Booked Air Volume: \$120 million
Consolidated U.S. TMC: CWT

Investment bank and financial services firm Citigroup in 2017 saw revenue and some travel activity increase from 2016. The company's



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"Your company spends **23%** more in cost per mile than your peers"



"**55%** of your company's bookings are with your non-preferred hotels"



"Your company spends **18%** more at fine dining restaurants than your peers"

PAYMENTS PROGRAM COMPLIANCE

Companies can track current spending to help detect fraud or policy abuses and increase program compliance.

For example, get insights like:



"Your company has **40%** more late payment charges than your peers"



"**27%** of your company's questionable spending is at department stores"



"**7%** of your spending is during the weekend in your employees' home city"

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Southwest Airlines®



At Southwest Airlines, we like to think of ourselves as a Customer Service company that happens to fly airplanes. Customer feedback shapes the way we do business. For example, we've been listening to Corporate Travel Managers and now have many changes underway.

>> B2B SERVICES TEAM

As we've grown our Corporate Sales Team, we've been able to add some key groups aimed at making Southwest easier to do business with. In June, Southwest added under the Corporate Sales umbrella a new B2B Services Team, responsible for providing end-to-end service for Southwest Corporate Customers. Aligned with the Southwest Field Sales Team, the new team cultivates travel partnerships that Southwest has with its top Corporate Customers, and ensures that Corporate Travel Managers and their Travelers receive the Customer experience outlined in their corporate contracts, from initial booking to return from business trips. The goal of this dedicated Corporate Sales B2B Services Team is to provide a one-call/ one-touch point resolution, that will streamline any service needs for top corporate Customers.



Services rendered will include but aren't limited to:

- Waivers & Favors
- Modifications
- Refunds
- Technical issues
- Loyalty verifications

Southwest will implement a pilot test of this new B2B Services program with a collection of top corporate Customers in Q4 2018. The pilot program will run through year end with a phased roll out of the B2B Services expected in early 2019.

>> TECHNOLOGY UPGRADE

To meet Customers' ever-changing needs, we also are updating SWABIZ, Southwest Airlines' FREE online corporate booking tool, which gives Corporate Travel Managers the ability to book and track their company's travel.

Enhancements already made to SWABIZ allow Customers to book and fly to any of our 11 international destinations, and include EarlyBird Check-In® on international reservations. Corporate Travel Managers will notice that we ramped up reportable data to record up to 25 months of air travel and up to 18 months of car travel data.

And, we're thrilled to announce that you now have the ability to add EarlyBird Check-In® to your SWABIZ booking through all channels listed below:

- www.swabiz.com
- www.southwest.com
- Southwest Airlines app

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business air travel last year accounted for about 151,100 metric tons of carbon dioxide equivalent emissions, more than 11 percent higher than in 2016. However, its 2017 rail travel generated 209 metric tons of such emissions, down from 2,225 the prior year. Still, Citi has procedures in place to encourage would-be travelers to consider remote conferencing options instead of traveling, including a prompt within its online booking system. The company also encourages employees to group trips together when possible, to reduce sheer volume of trips and to prioritize rail travel over air when possible.

Net revenue in 2017 increased about 2 percent to \$71.5 billion. Operating expenses declined less than half a percentage point to \$41.2 billion. Citi at the end of 2017 had about 209,000 full-time employees, about 10,000 fewer than at the end of 2016.

29 DELLEMIC ROUND ROCK, TEXAS

2017 U.S.-Booked Air Volume: \$117 million

2017 Global Air Volume: \$225 million

2017 U.S. T&E: \$560 million

2017 Global T&E: \$700 million

Principal Global Online Booking Tool: Concur

Principal Global Expense Supplier: Concur

Principal Payment Supplier: American Express

Consolidated Global TMC: Amex GBT

Of DellEMC's 2017 U.S.-booked dollar volume, 65 percent was for domestic travel. Eighty-three percent of the company's U.S.-booked airline tickets were made through approved online channels; of those bookings, 79 percent did not require agent assistance.

DellEMC formed in 2016 when Dell Inc. acquired EMC Corp. Previously, Dell and EMC had their own travel programs, and they were consolidated under DellEMC in April 2018. DellEMC partnered direct with Concur to launch 29 new Concur Travel booking tool configurations across 81 countries. The company realized booking process improvements by consolidating and aligning servicing configurations for both companies into four service hub centers across the globe. The improvements brought consistent servicing and greater compliance to DellEMC's travel policy and increased transaction fee savings to DellEMC.

The company also expanded its Business Class Road Warrior Program, which serves employees who have traveled over 100,000 miles in the previous year, and refreshed its business class policy. DellEMC plans to enhance its travel technology later in 2018. The company estimates its U.S.-booked air volume will stay at \$117 million in 2018. As of July 2018, the company's U.S. online adoption was 90 percent and global online adoption was 85 percent. The company is expanding online to Colombia, Chile, Peru and India, expanding Yapta and Tripbam to additional markets and implementing Tripism.

29 RAYTHEON CAMBRIDGE, MASS.

2017 U.S.-Booked Air Volume: \$117 million

Consolidated Global TMC: BCD

BTN estimates that U.S.-booked air travel spend increased less than 2 percent in 2017 at defense contractor Raytheon, which continues to take steps to control travel costs. The company began a global rollout of a virtual

collaboration platform that enables virtual meetings, as well as secure email and chat. Raytheon last year also worked to upgrade the reliability of its global videoconferencing services and allows the use of tools like Skype, all in an effort to minimize air travel and control costs. Raytheon's 2017 net sales increased 5 percent year over year to \$25.3 billion; its backlog, a measure of firm orders for which work has yet to be performed, increased 4 percent to \$38.2 billion. Operating expenses increased about 5 percent to \$22 billion. The company at year-end 2017 employed 64,000 people, up from 63,000 one year prior.

31 WALT DISNEY BURBANK, CALIF.

2017 U.S.-Booked Air Volume: \$116 million

Principal Global Expense Supplier: Concur

Principal Payment Supplier: Citi Visa

Consolidated Global TMC: Amex GBT

In 2017, Walt Disney reorganized its travel team, selected and implemented a new global travel management company and launched a new group/event policy. Over the past 12 months, Disney Global Travel has launched Concur Travel and Expense globally, continuing a focus to increase online adoption. In July 2018, Disney and Fox shareholders approved Disney's \$71.3 billion acquisition of 21st Century Fox. Disney, whose 2017 revenue was \$55.1 billion, will own Fox's TV and movie studio, cable TV channels FX and National Geographic, a stake in streaming service Hulu and TV operations in India, and Fox's 39 percent stake in London-based pay-TV company Sky. However, on Sept. 22, 2018, Comcast beat out Fox in an auction to buy a majority stake in Sky. In 2019, Disney may see additional acquisitions. U.S.-booked air volume for Disney, which has a single global travel policy, fell \$20 million in 2017.

32 FACEBOOK MENLO PARK, CALIF.

2017 U.S.-Booked Air Volume: \$113 million

Growing technology giant Facebook—parent of Instagram and WhatsApp, among other platforms—last year increased its spend on U.S.-booked air travel by about 13 percent, according to a BTN estimate. Revenue increased about 47 percent to \$40.7 billion; sales and marketing expenditures increased about 25 percent to \$4.7 billion. At year-end 2016, the company employed 17,048. That number grew to 25,105 a year later and by the middle of 2018 had reached 30,275. Facebook began to track its travel-related greenhouse gas emissions in 2017, when its carbon dioxide equivalent was 93,800 metric tons. The company in 2016 began to develop a traveler safety program.

33 UNITED TECHNOLOGIES FARMINGTON, CONN.

2017 U.S.-Booked Air Volume: \$111 million

Principal Hotel Suppliers: Hilton & Marriott

Principal Car Rental Supplier: Avis

Principal U.S. Online Booking Tool: Concur

Consolidated Global TMC: Amex GBT

Manufacturing and aerospace conglomerate United Technologies increased its U.S.-point-of-sale airline spend by nearly 7 percent in 2017. It renewed its contract with Avis and is wrapping up an airline RFP. Policy changes certainly could have impacted those negotiations; some United Technologies

operating divisions like Pratt & Whitney aircraft engines, Otis elevators and Carrier HVAC and refrigeration decreased the threshold for business class use from flights of 12 hours to flights of six hours. Meanwhile, the acquisition of Rockwell Collins will add significantly to the company's airline volume. For online booking, the company is looking to consolidate to a global system. It has started using KDS Neo in Eastern Europe. United Technologies also is considering switching to Concur Expense.

34 SANOFI PARIS

2017 U.S.-Booked Air Volume: \$104 million
Consolidated Global TMC: Amex GBT

BTN estimates that spending on U.S.-booked air travel for pharmaceutical giant Sanofi increased less than 1 percent in 2017. Sanofi continues to minimize travel spend and travel-related carbon emissions. The company's global travel policy, in fact, recommends that before any business trip, the feasibility of a virtual meeting must be assessed. Sanofi helps to facilitate such meetings by offering in-house high-definition videoconferencing and telepresence rooms throughout the world. Additionally, when certain criteria are selected in the company's booking tool, the tool will prompt travelers to consider travel alternatives. The company's business air travel, hotel and

rental car use generated about 111,440 metric tons of carbon dioxide in 2017, an increase of about 1 percent year over year. Sanofi at year-end 2017 employed 106,566; that 293 fewer than one year earlier. The company's net sales increased 36 percent in 2017 to 35.1 billion euros. In 2018, Sanofi has acquired biotechnology firms Bioerativ and Ablynx.

35 NORTHROP GRUMMAN FALLS CHURCH, VA.

2017 U.S.-Booked Air Volume: \$103 million
Consolidated U.S. TMC: BCD

BTN estimates that defense contractor and aerospace conglomerate Northrop Grumman in 2017 spent about 6 percent less on U.S.-booked air travel than in 2016. Northrop Grumman's business travel—including air and rail travel, hotel stays and rental car use—generated about 143,330 metric tons of carbon dioxide equivalent emissions in 2017, up 13 percent year over year. The company employed approximately 70,000 people at the end of 2017, about 3,000 more than 12 months prior. Sales revenue increased 5 percent in 2017 to \$25.8 billion. Its backlog, a measure of firm orders not yet fulfilled, declined 5 percent to \$42.9 billion. The company in June 2018 closed the \$9.2 billion acquisition of rocket, missile and satellite manufacturer Orbital ATK, subsequently renaming it Northrop Grumman Innovation Systems.

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36 PFIZER NEW YORK CITY

2017 U.S.-Booked Air Volume: \$102 million
2017 Global Air Volume: \$200 million
2017 U.S. T&E: \$306 million
2017 Global T&E: \$735 million
Principal Air Suppliers: United, Delta & American
Principal Hotel Suppliers: Marriott & Hyatt
Principal Car Rental Supplier: Hertz
Principal Online Booking Tool: Concur
Principal Expense Supplier: Concur
Principal Payment Supplier: American Express
Consolidated Global TMC: BCD

Pfizer's U.S. T&E reached \$306 million in 2017, an increase in spend from 2016 as a result of mergers and acquisitions. Pfizer's U.S.-booked air volume reached \$100 million, up \$1.4 million from 2016. Sixty percent of 2017 U.S.-booked air volume was for international travel. Of the 2017 U.S.-booked air volume, 78 percent went through the company's approved online tools; 62 percent of online bookings required no agent assistance. The company enhanced traveler engagement and communication in 2017 which resulted in a 12 percent increase in compliance. This year, Pfizer is consolidating its reporting to provide more timely, accurate and actionable information to stakeholders. Pfizer has an individual bill/central pay corporate card program. The company has a single global travel policy.

37 DOWDUPONT MIDLAND, MICH./WILMINGTON, DEL.

2017 U.S.-Booked Air Volume: \$100 million
Primary U.S. TMC: BCD

Chemical conglomerate DowDuPont makes its first-ever appearance on the CT100 in its current form, but its stay likely will be brief. DowDuPont formed in August 2017 after the merger of chemical manufacturers Dow Chemical and DuPont, which was announced in late 2015. The U.S.-booked air volume listed here represents Dow Chemical's and DuPont's separate volumes through August 2017 and combined thereafter. All things considered, BTN estimates the combined volume increased by a double-digit percentage year over year. DowDuPont, however, intends by June 2019 to split into three separate publicly traded companies, focused respectively on agricultural products, materials science and specialty products, each using the now-combined resources of Dow and DuPont. The combined company reported 2017 revenue of \$62.5 billion, up about 30 percent from 2016. The company at the end of 2017 had about 98,000 full-time employees.

37 MEDTRONIC DUBLIN

2017 U.S.-Booked Air Volume: \$100 million
2017 Global Air Volume: \$175 million
Principal Air Suppliers: Delta, United & American
Principal Hotel Supplier: Marriott
Principal Car Rental Suppliers: Enterprise Holdings & Avis
Principal U.S. Online Booking Tool: GetThere

Principal U.S. Expense Supplier: adSOFT Expense Express
Principal Payment Supplier: American Express
Consolidated Global TMC: Amex GBT

Medtronic's U.S.-booked air volume fell by \$22 million to \$100 million in 2017. Fifty-five percent of that volume was for domestic travel. About 92 percent of U.S.-booked air volume went through Medtronic's approved online channels; 82 percent of those were completed without agent assistance. Medtronic estimates its U.S.-booked air volume will rebound to \$111 million in 2018. The corporate card program is individual bill/central pay. The medical technology firm has a global travel policy in place for more than 80 percent of its travel spend. In 2017, it completed a global air RFP. In 2018, it plans to implement a stronger global travel policy. The policy will include checked baggage reimbursement and approved ridehailing services; however, it will deny reimbursements for booking with alternative lodging suppliers like Airbnb and VRBO.

37 ROYAL DUTCH SHELL THE HAGUE, NETHERLANDS

2017 U.S.-Booked Air Volume: \$100 million
Consolidated U.S. TMC: CWT

Global oil and gas giant Royal Dutch Shell's U.S.-booked air volume declined about 10 percent in 2017, according to a BTN estimate. Shell's business air travel in 2017 resulted in 210,000 metric tons of carbon dioxide equivalent emissions, down from 400,000 in 2016. It wasn't clear if a methodological change affected those figures. Revenue jumped almost 31 percent in 2017 to \$305.1 billion, with net income increasing to nearly \$13 billion from nearly \$4.6 billion in 2016. The company on Dec. 31, 2017, employed 84,000 people, down from 89,000 at year-end 2016.

37 SAP WALLDORF, GERMANY

2017 U.S.-Booked Air Volume: \$100 million
Consolidated U.S. TMC: BCD

According to a BTN estimate, SAP's U.S.-booked air volume declined in 2017. The enterprise software giant owns online booking and expense reporting technology provider Concur and in 2018 acquired enterprise software firm CallidusCloud and software development firm Coresystems. In 2017, SAP continued a program launched in 2015 in which an internal fee is charged on business air travel in certain countries and the proceeds offset carbon emissions. In 2017, that compensated for about 135,000 metric tons of carbon dioxide equivalent, compared with 90,000 metric tons in 2016. The company continues to invest in remote conferencing tools as a method of avoiding business air travel. SAP revenue increased about 6 percent in 2017 to nearly 235 billion euros. The company had about 88,400 full-time equivalent employees at the end of 2017, up from about 84,200 one year earlier.

41 MERCK KENILWORTH, N.J.

2017 U.S.-Booked Air Volume: \$99.6 million
2017 Global Air Volume: \$209 million
2017 U.S. T&E: \$252 million
2017 Global T&E: \$520 million



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Principal Hotel Suppliers: Hilton, Hyatt, AccorHotels, Marriott & InterContinental
Principal Car Rental Supplier: Avis
Principal Online Booking Tool: Concur
Principal Global Expense Supplier: SAP
Principal Payment Supplier: American Express
Consolidated U.S. TMC: Amex GBT
Primary Non-U.S. TMCs: Amex GBT & BCD

Merck's 2017 U.S.-booked air volume rose from \$97.2 million in 2016, and it's estimated to reach \$114 million in 2018. Of total U.S.-booked air volume, 78 percent went through an approved online booking channel. Seventy-four percent of 2017 U.S.-booked air volume was for international travel. In 2017, the company launched a new air program. Optimizing that program will be a priority for 2018. Additionally, Merck will focus on data and on enabling technologies this year. Merck's single global travel policy underwent two changes in 2017: The number of travelers allowed on a single flight increased from 25 to 40, and the company adjusted the definition of lowest fare to reflect its new air program. Its card program is individual bill/central pay. Amex GBT is the company's consolidated TMC in the U.S., EMEA and Latin America, and BCD Travel supports the company's travel needs in Asia/Pacific.

42 ABBOTT ABBOTT PARK, ILL.

2017 U.S.-Booked Air Volume: \$99 million
Consolidated U.S. TMC: Amex GBT

BTN estimates that U.S.-booked air spend at pharmaceutical and medical device firm Abbott increased more than 5 percent in 2017. Abbott has continued to implement policies to limit or reduce its business travel, including recommendations to use remote conferencing services in lieu of travel. Still, the company's emissions of carbon dioxide equivalent due to its business travel increased about 29 percent in 2017 to 173,000 metric tons. Abbott's 2017 net sales increased more than 31 percent to nearly \$274 billion. The company closed the acquisition of global medical device manufacturer St. Jude Medical in January 2017 and the acquisition of diagnostic device and service provider Alere in October 2017, accounting in part for the significant sales increase. Abbott's selling, general and administrative expenses increased nearly 37 percent to \$9.1 billion. Abbott employed approximately 99,000 people at the end of 2017, up from 94,000 a year prior.

43 ABBVIE NORTH CHICAGO, ILL.

2017 U.S.-Booked Air Volume: \$94 million
Principal U.S. Online Booking Tool: Concur
Principal Payment Supplier: Bank of America
Consolidated U.S. TMC: Amex GBT

Pharmaceutical firm AbbVie in 2017 increased its U.S.-booked air travel spend by about 9 percent, according to a BTN estimate. The company has further expanded its single Bank of America card platform outside the U.S. and has deployed its Concur Travel booking tool in some foreign countries, as well. Revenue increased 10 percent to more than \$28.2 billion, driven by increased sales of its Humira arthritis medication, among other products. Selling, general and administrative expenses increased 7 percent to about \$6.3 billion. AbbVie on Jan. 31, 2018, employed approximately 29,000 people, down from about 30,000 at the beginning of 2017.

43 TIME WARNER NEW YORK CITY

2017 U.S.-Booked Air Volume: \$94 million
Consolidated Global TMC: BCD

BTN estimates Time Warner's U.S.-booked air volume increased about 2 percent in 2017. AT&T acquired entertainment and media conglomerate Time Warner in June 2018, 20 months after the proposed acquisition was announced. Time Warner today exists as WarnerMedia, an AT&T subsidiary. Before the acquisition closed, several Time Warner subsidiaries—including HBO, Turner and Warner Bros.—operated separate but collaborative travel programs. Time Warner's revenue increased about 6.7 percent in 2017 to about \$31.3 billion. Selling, general and administrative expenses increased 6.1 percent to \$5.4 billion. The company had 26,000 employees at the end of 2017, about 1,000 more than it had 12 months earlier.

45 THE CHURCH OF JESUS CHRIST OF LATTER-DAY SAINTS SALT LAKE CITY

2017 U.S.-Booked Air Volume: \$93 million
Principal Air Suppliers: Delta, American, Alaska, Avianca, Copa, Cathay Pacific & Air New Zealand
Principal Hotel Suppliers: Marriott, Choice & La Quinta
Principal Car Rental Suppliers: Enterprise Holdings & Hertz
Principal U.S. Online Booking Tool: e-Travel Management

U.S.-booked air volume for The Church of Jesus Christ of Latter-Day Saints rose \$3 million in 2017, and the church projects a \$2 million increase in U.S.-booked air spend for 2018. Forty-nine percent of U.S.-booked airline tickets went through approved online booking tools in 2017, 75 percent of those completed without an agent. While LDS does not have a consolidated global agency, CWT handled 15 percent of its U.S.-booked air volume in 2017. The church, which has a travel program of more than 65,000 missionaries and other travelers who go to nearly every country in the world, has a single global travel policy.

In 2017, the church performed several regional RFP's for airline volumes throughout the world and completed a global rental car supplier RFP. In recent years, the church has put a particular focus on evaluating airlines not only on cost but also on the quality of service they provide. Last year, the travel team introduced a metric called quality cost per mile rather than using the standard cost-per-mile metric. That has boosted traveler satisfaction and spurred deeper cooperation between the church and its airline partners, which the metric helped consolidate.

The church last year significantly strengthened the duty of care coverage of its travelers and had more than 60,000 visas processed or renewed worldwide. In terms of travel policy changes, LDS strengthened its global duty of care policy and added an official policy regarding ridehailing services.

46 NOVARTIS BASEL, SWITZERLAND

2017 U.S.-Booked Air Volume: \$90 million
Principal Air Suppliers: United, American & Delta

Principal Hotel Suppliers: Marriott & Hilton
Principal Car Rental Suppliers: Hertz & National
Principal U.S. Online Booking Tool: GetThere
Principal Non-U.S. Online Booking Tools: GetThere & Cytric
Principal U.S. Expense Supplier: Concur
Principal Payment Supplier: Citi
Consolidated Global TMC: CWT

In 2017, Novartis' U.S.-booked air volume leapt \$24 million. The pharmaceutical firm estimates that number will rise to \$105 million in 2018. Forty-four percent of Novartis' 2017 U.S.-booked air volume was for domestic travel. Seventy percent of U.S.-booked airline tickets were made through an approved online booking tool. The firm's card program is individual bill/central pay. Novartis issued a single global travel policy in 2016 and in 2017 simplified it by removing the requirement for travelers to get their managers' approval for out-of-policy bookings and removing formal pretrip approval processes. In 2018, the firm is focusing on making the end-to-end travel booking and expense process intuitive and streamlining and simplifying it. Novartis does not plan travel policy changes in 2018.

47 NIKE BEAVERTON, ORE.

2017 U.S.-Booked Air Volume: \$88 million
2017 Global Air Volume: \$130 million
Principal Air Suppliers: Delta, Air France-KLM, Alaska, American & United
Principal Hotel Suppliers: Hyatt & Marriott
Principal Car Rental Suppliers: Hertz & National
Principal Payment Supplier: Citi
Principal Online Booking Tool: Concur
Principal Global Expense Supplier: Concur
Consolidated Global TMC: BCD

Nike's 2017 U.S.-booked air volume rose \$5 million in 2017, according to a BTN estimate. Global air volume was \$130 million. Revenue grew 6 percent to \$34.4 billion. The company implemented BCD Travel as its global travel management company during the year. As of May 31, 2017, Nike employed 74,400 employees, the same as a year prior. Nike has 384 stores in the U.S. and 758 outside the country.

48 GENERAL MOTORS DETROIT

2017 U.S.-Booked Air Volume: \$87 million
Consolidated U.S. TMC: Amex GBT

According to a BTN estimate, automaker General Motors' spending on U.S.-booked air travel dropped more than 5 percent in 2017. Revenue declined about 2.4 percent to \$145.6 billion. Total expenses declined 2.6 percent to \$135.6 billion. The company at year-end 2017 had about 180,000 employees, about 77,000 of whom were salaried. One year earlier, GM had 225,000 employees, 90,000 of whom were salaried. GM's car-sharing operation, Maven, expanded to 18 cities in the U.S. and Canada in 2017, and the company is piloting the operation in Australia. The company also rents vehicles on a weekly basis to Uber and Lyft drivers in some U.S. cities; GM in 2016 paid \$500 million for a 9 percent ownership stake in Lyft.

49 GSK LONDON

2017 U.S.-Booked Air Volume: \$82 million
Consolidated U.S. TMC: BCD

Pharmaceutical giant GSK in 2017 increased its U.S.-booked air travel spend less than 4 percent, according to a BTN estimate. Travel by GSK's sales force, not including other forms of business travel by air or car, accounted for about 147,000 metric tons of carbon dioxide equivalent emissions, down from about 150,000 in 2016. GSK's 2017 revenue increased by about 3 percent to about 30.2 billion pounds, applying a constant exchange rate, as the company's pharmaceuticals, vaccines and consumer healthcare businesses each showed growth. Selling, general and administration expenses increased from about 9.4 billion pounds in 2016 to 9.7 billion in 2017; under constant currency exchange levels, they declined 1 percent. The company at year-end 2017 employed about 98,500 people, down slightly from the 99,300 a year earlier. GSK in June 2018 completed a \$13 billion buyout of the 36.5 percent share held by Novartis in a consumer healthcare joint venture between the two companies.

50 GENERAL DYNAMICS FALLS CHURCH, VA.

2017 U.S.-Booked Air Volume: \$80 million
Principal Online Booking Tool: Concur
Principal Expense Supplier: Concur
Primary U.S. TMC: BCD

Defense contractor and aerospace company General Dynamics in 2017 spent about 5 percent less on U.S.-booked air travel than it did in 2016, according to a BTN estimate. Revenue increased about 1.3 percent in 2017 to about \$31 million. Operating costs and expenses declined less than one-10th of a percent to \$26.8 billion. In April 2018, General Dynamics completed its \$9.7 billion acquisition of IT services firm CSRA, which now resides in General Dynamics' Information Technology business. At year-end 2017, General Dynamics employed about 98,600 people, about 200 fewer than it had one year earlier. CSRA in March 2017 had 18,500 employees.

50 GOLDMAN SACHS NEW YORK CITY

2017 U.S.-Booked Air Volume: \$80 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 Payment Supplier: American Express
Principal Expense Supplier: Proprietary tool
Consolidated Global TMC: Amex GBT

Goldman Sachs increased its spending on airline tickets at the U.S. point of sale by about \$6 million in 2017, particularly for client-facing travel as the company aims for \$5 billion in incremental growth by

2020. At the same time, however, the company offset the increasing expenditures by controlling nonclient-related travel. Goldman expects air spend to continue to increase, but it also instituted several mechanisms for managing internal travel last year, including centralized pretrip approval and reporting and budget tracking tools.

The company invested significant effort in renegotiating multi-year contracts for travel agency, corporate card and commercial services globally and refreshed its hotel program. To aid commuting to its large corporate campus in Bengaluru, India, the company made live an online booking and inventory management solution for ground transportation.

Goldman has been working on final contract terms with American Express Global Business Travel for mobile travel services and tested the agency's Hotel Re-Shop solution. This year, the company plans to try Amex GBT's Air Re-Shop Expert solution and to continue to assess other mid- and back-office tools to drive commercial savings. The firm also is ensuring it has options, considering Brexit's potential impact on mobility, commuting and relocation.

52 INTEL SANTA CLARA, CALIF.

2017 U.S.-Booked Air Volume: \$79 million

2017 Global Air Volume: \$127 million

2017 U.S. T&E: \$122 million

2017 Global T&E: \$200 million

Principal Online Booking Tool: Concur

Principal Expense Supplier: Concur

Principal Payment Supplier: American Express

Consolidated U.S. TMC: Amex GBT

Primary Non-U.S. TMCs: JTB & CWT

Intel's global air volume dropped 27 percent in 2017, and its global T&E fell 22 percent. U.S.-booked air volume fell by a less dramatic 17 percent, and U.S. T&E by 18 percent. Just 24 percent of the company's U.S.-booked air volume was domestic. Sixty-seven percent of the company's U.S.-booked airline tickets were made through Intel's approved online tools; 60 percent of those were booked without an agent's help. In 2017, Intel expanded global adoption of Concur online booking, and in 2018, it mandated the use of preferred booking channels. Concur also serves as Intel's expense technology provider. The company has integrated price assurance technologies and enhanced dashboard capabilities. Intel has an individual bill/individual pay card program. It maintains a single travel policy for more than 80 percent of the company's travel spending. After volume declines in 2017, Intel expects its U.S.-booked air to inch up to \$80 million this year.

53 INTERNATIONAL MONETARY FUND WASHINGTON, D.C.

2017 U.S.-Booked Air Volume: \$78.7 million

Principal Hotel Suppliers: Marriott & InterContinental

Principal U.S. Online Booking Tool: GetThere

Principal U.S. Expense Supplier: PeopleSoft

Principal Payment Supplier: BMO

Consolidated U.S. TMC: BCD

The International Monetary Fund's U.S.-booked air volume increased \$2.7 million in 2017. All but 4 percent of the organization's U.S.-booked air spend is for international travel. The IMF has a central bill/central pay card program and a single global travel policy. This year, the organization continues to review its trip approval process and expense systems.

54 TOYOTA MOTOR NORTH AMERICA

PLANO, TEXAS

2017 U.S.-Booked Air Volume: \$73.7 million

2017 U.S. T&E: \$700 million

Principal Air Suppliers: Delta, American & United

Principal Hotel Suppliers: Marriott, Hilton & InterContinental

Principal Car Rental Suppliers: National & Hertz

Principal U.S. Online Booking Tool: GetThere

Principal U.S. Expense Supplier: Chrome River

Principal Payment Supplier: American Express

Primary U.S. TMC: BCD

Toyota Motor North America's U.S.-booked travel spend dropped \$1.4 million in 2017, and the company expects it to decrease by \$11.7 million in 2018 to \$62 million. For 2018, the company has mandated travel booking channels and instituted hotel rate caps and plans to implement a meetings policy in 2019. Toyota North America also plans to bring Canada and Mexico into its managed travel program, which currently has a single travel policy for the U.S. and has an individual bill/central pay card program. Fifty-three percent of 2017 U.S.-booked air spend was for international travel. Seventy-one percent of U.S.-booked air tickets were made on approved online tools, and 82 percent of those were booked without an agent's help. BCD Travel handled 80 percent of the company's U.S.-booked air volume. The company recorded revenue of \$3.7 billion in 2017.

55 HONEYWELL MORRIS PLAINS, N.J.

2017 U.S.-Booked Air Volume: \$73 million

Consolidated U.S. TMC: BCD

After decreasing U.S.-booked air volume in 2016, consumer and commercial products conglomerate Honeywell reversed course in 2017 and increased such spend about 7 percent, BTN estimates. The company's net sales in 2017 totaled about \$40.5 billion, about 3.1 percent higher than in 2016. Costs and expenses increased about 2.4 percent to \$33.6 billion. By the end of 2018, Honeywell plans to spin off its \$4.5 billion homes and ADI Global Distribution businesses, with 13,000 employees, as well as its \$3 billion Transportation Systems business, with 6,500 employees, into separate, standalone, publicly traded companies. The company at year-end 2017 had approximately 131,000 employees, about the same as it did one year before. About 46,000 Honeywell employees are located in the U.S.

56 KOCH WICHITA, KAN.

2017 U.S.-Booked Air Volume: \$72 million

2017 Global Air Volume: \$91 million

Principal Online Booking Tool: Concur

Principal Expense Supplier: Concur

Consolidated Global TMC: CWT

2017 U.S.-booked air volume at privately held conglomerate Koch increased about 6 percent year over year, reversing a 2016 decline. Koch owns paper manufacturer Georgia-Pacific, resin and fiber company Invista and many others in an array of industries and has an annual revenue as high as \$100 billion, according to Forbes. The company employs nearly 120,000 people, about 65,000 of whom work in the U.S. Koch in 2017 invested more than \$2 billion for a stake in enterprise software firm Infor and acquired glass and coating firm Guardian Industries, which has nearly 150 locations in more than 25 countries.

57 CHEVRON SAN RAMON, CALIF.

2017 U.S.-Booked Air Volume: \$71.4 million

2017 Global Air Volume: \$161.5 million

2017 U.S. T&E: \$143 million

2017 Global T&E: \$264.7 million

Principal Air Suppliers: United, Delta & Southwest

Principal Hotel Suppliers: Marriott, Hilton & Hyatt

Principal Car Rental Suppliers: Avis/Budget & Enterprise

Principal Global Online Booking Tool: Concur

Principal Global Expense Supplier: Concur

Principal Payment Supplier: American Express

Consolidated U.S TMC: CWT

Primary Non-U.S. TMC: CWT

Chevron's annual revenue rose \$24.5 billion to \$134.7 billion in 2017. Last year, U.S.-booked air volume rose 12.2 percent from 2016's \$63.6 million and is expected to hit \$82.1 million in 2018. Of the 2017 U.S.-booked air volume, 70 percent was for international travel. Sixty-six percent of U.S.-booked airfares went through approved online channels, 78 percent of those without agent assistance.

In 2017, Chevron reviewed and strengthened its travel risk management and safety processes, continued the global expansion of the Concur Travel booking tool, expanded the influence of its strategic meetings management program and drove a larger percentage of its travel spend through managed channels. CWT supported Chevron's managed travel in the U.S. and most of it elsewhere in the world, though Travel Leaders, Quantum, Sanel and ATPi also served Chevron. 2018 represents Chevron's fourth year in a five-year initiative with Carlson Wagonlit Travel to continue to deliver affordable, effective and efficient travel management services. They also continued to move away from local support to centralized, 24/7 follow-the-sun service delivery.

Also in 2018, Chevron is refining its mobile strategy. The company is working on a mobile platform to keep employees informed and allow flexibility when traveling. It has approached sharing economy options, careful not to compromise traveler safety or

policy compliance. It made no policy changes in 2017 but authorized ridesharing within the travel policy in 2018. Also this year, Chevron will source and implement a new meetings and events system in the U.S., continue to migrate from local agency service to a shared-service model and continue its global implementation of Concur Travel & Expense.

The company has one single global travel policy and an individual bill/individual pay corporate card program.

58 UNITEDHEALTH GROUP MINNETONKA, MINN.

2017 U.S.-Booked Air Volume: \$71 million

Principal U.S. Online Booking Tool: Concur

Principal Global Expense Supplier: Concur

Principal Payment Supplier: US Bank

Consolidated Global TMC: BCD

UnitedHealth Group implemented stricter pretrip approvals in 2017, contributing to a \$9 million drop in U.S.-booked air volume as companywide revenue grew from \$184.8 billion to \$201.2 billion. Ninety percent of its 2017 U.S.-booked air volume was for domestic travel. Eighty-seven percent of U.S.-booked airline tickets were made through UnitedHealth's online booking tools. UnitedHealth has a single global travel policy.

59 WALMART BENTONVILLE, ARK.

2017 U.S.-Booked Air Volume: \$70 million

BTN estimates that retail giant Walmart's 2017 U.S.-booked air volume increased slightly in 2017, by about 1 percent. Revenue for the 12 months ending Jan. 31, 2018, increased 3 percent year over year to \$500.3 billion. Operating income declined 10 percent to \$20.4 billion as expenses increased. Walmart at the end of January had 11,718 stores open worldwide, including Sam's Club, 23 more than it had one year prior. The company had about 2.3 million employees worldwide, about the same as 12 months prior, with 1.5 million associates in the U.S.

60 UBS ZURICH

2017 U.S.-Booked Air Volume: \$67 million

2017 Global T&E: \$425.1 million

Consolidated Global TMC: BCD

BTN estimates that U.S.-booked air spend at investment bank and financial services firm UBS declined about 14 percent in 2017 amid a drop in overall T&E spend. Global T&E totaled 416 million Swiss francs (US\$425.1 million), down from 423 million Swiss francs in 2016.

UBS and BCD Travel in 2018 unveiled a service model in which dedicated agent teams in Zurich, London and New York service UBS traveler calls. The agents, well-versed in universal UBS travel policy, all use the same technology and are available 17 hours per day, five days a week. Outside that time window, nondedicated

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agents who nevertheless have been trained on UBS travel policy are available.

UBS and PredictX have developed machine learning algorithms to retrieve travel data from multiple sources to assess total trip cost before a trip is taken. That data also is being used to generate real-time travel spend trend reports automatically for key stakeholders. UBS also is developing a predictive data set with reporting, including pretrip assessments of the potential value of a trip.

In the 12 months ending June 30, 2017, UBS business travel generated about 54,400 metric tons of carbon dioxide equivalent emissions, or 9,337 metric tons per full-time equivalent employee. Those figures are lower than in the previous 12 months, when UBS business travel generated 67,000 metric tons, or 11,141 per full-time equivalent employee. The company encourages employees to choose high-speed rail or remote conferencing technology instead of air travel as a method of emissions reduction.

UBS had nearly 62,600 employees at the end of 2017, up from 59,400 one year prior. Operating revenue increased to nearly 29.1 billion Swiss francs in 2017, up from about 28.3 billion Swiss francs in 2016.

61 CREDIT SUISSE ZURICH

2017 U.S.-Booked Air Volume: \$65 million

2017 Global T&E: \$328.8 million

Financial services company and investment bank Credit Suisse spent about 7 percent less on U.S.-booked air travel in 2017 than it did in 2016, according to a BTN estimate. Credit Suisse spent 321 million Swiss francs (US\$328.8 million, using a Dec. 31, 2017, exchange rate) on global travel and entertainment. That's about 2.1 percent less in Swiss francs than the 327 million Swiss (US\$321.8 million, as of Dec. 31, 2016) spent on global T&E in 2016.

The company accounted for 418.9 million kilometers of business travel in 2017, down from 432.1 million the year before. The average Credit Suisse full-time employee was responsible for 8,850 kilometers in business travel, down from 9,100 kilometers in 2016. Credit Suisse encourages rail travel for short business trips to reduce the environmental impact of its travel and suggests remote conferencing options. Employees in 2017 accounted for 211,500 hours of videoconferencing, via desktop software and videoconferencing rooms, up from 190,400 hours in 2016. The company purchases emissions-reduction certificates to offset emissions generated via air travel. In 2017, the company totaled 46,200 metric tons of carbon dioxide equivalent emissions from its air travel, compared with 48,000 in 2016.

Credit Suisse's revenue increased about 1 percent in 2017 to 21.8 billion Swiss francs. The company employed 46,840 people at the end of the year, down from 47,170 one year earlier.

61 L3 TECHNOLOGIES NEW YORK CITY

2017 U.S.-Booked Air Volume: \$65 million

Consolidated Non-U.S. TMC: Amex GBT

L3 spent slightly less on U.S.-booked air travel in 2017 than it did

a year earlier. It employs 31,000 worldwide and provides communication, electronic and sensor systems used on military, homeland security and commercial platforms. L3 is also a prime contractor in aerospace systems, security and detection systems and pilot training. The company reported 2017 sales of \$9.6 billion.

63 ALLERGAN DUBLIN

2017 U.S.-Booked Air Volume: \$64 million

Principal Air Suppliers: American, Delta & United

Principal Online Booking Tool: Concur

Principal Expense Supplier: Concur

Consolidated Global TMC: BCD

Pharmaceutical company Allergan, maker of Botox and dozens of other drugs, in 2017 spent nearly 15 percent less on U.S.-booked travel than it did in 2016. Allergan's net revenue increased about 9.4 percent to about \$15.9 billion. The company's selling and marketing expenses, which include travel, increased more than 8 percent to about \$3.4 billion. The company completed several acquisitions in 2017, including Keller Medical, Zeltiq Aesthetics and LifeCell. At year-end 2017, Allergan employed about 17,800 people, up from 16,700 one year prior. Allergan also uses Maritz Travel Co. for some meeting planning services in the U.S.

63 MORGAN STANLEY NEW YORK CITY

2017 U.S.-Booked Air Volume: \$64 million

Consolidated Global TMC: Amex GBT

BTN estimates investment bank and financial services firm Morgan Stanley's U.S.-booked air volume increased about 7 percent in 2017. Net revenue increased about 9.5 percent to \$37.9 billion. Non-interest expenses outside of compensation and benefits increased about 4.8 percent to \$10.4 billion. At year-end 2017, Morgan Stanley had about 57,600 employees in 42 countries, up from 55,000 at the end of 2016. The company announced in 2017 a goal of carbon neutrality for its business operations, including business travel, by 2022.

65 SCHLUMBERGER PARIS

2017 U.S.-Booked Air Volume: \$63 million

BTN estimates oil field services firm Schlumberger spent about \$62 million in 2017 on U.S.-booked air travel, restoring the company to BTN's Corporate Travel 100 after a two-year absence. Schlumberger's 2017 revenue increased about 9.5 percent to approximately \$30.4 billion. Its full-year net loss totaled \$1.5 billion; excluding charges and credits, however, Schlumberger turned a profit of \$2.1 billion, compared with a nearly \$1.6 billion profit in 2016. Schlumberger at year-end 2017 employed about 100,000 people in more than 85 countries, about the same as it did 12 months prior.

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City	Avg Hotel Cost Across Selected Tiers	Avg Car Rental Cost Across Selected Classes	Total Cost for Selected Meals	Total Daily Cost	YOY Change
Akron, OH	\$141.75	\$44.17	\$86.53	\$272.46	1.45%
Albany, NY	\$162.91	\$46.28	\$95.73	\$304.92	-2.50%
Albuquerque, NM	\$122.03	\$48.10	\$96.53	\$266.67	2.44%
Allentown, PA	\$152.32	\$40.66	\$89.66	\$282.65	1.96%
Anaheim, CA	\$190.14	\$42.98	\$103.21	\$336.33	-0.38%
Atlanta, GA	\$173.76	\$48.06	\$106.37	\$328.19	0.11%
Austin, TX	\$188.43	\$32.75	\$102.12	\$323.31	0.92%
Bakersfield, CA	\$121.21	\$42.13	\$85.47	\$248.81	1.69%
Baltimore, MD	\$186.78	\$43.96	\$109.50	\$340.25	0.13%
Baton Rouge, LA	\$138.53	\$48.83	\$90.91	\$278.27	-0.31%
Bloom, MS	\$115.25	\$40.01	\$87.73	\$242.99	1.82%

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66 BAYER LEVERKUSEN, GERMANY

2017 U.S.-Booked Air Volume: \$62.5 million
Principal Air Suppliers: United, Delta & American
Principal Hotel Suppliers: Marriott, Hilton & InterContinental
Principal Car Rental Supplier: Hertz
Principal U.S. Online Booking Tool: Concur
Principal Non-U.S. Online Booking Tool: Onesto
Principal Global Expense Supplier: Concur
Principal Payment Suppliers: Citi & American Express
Primary U.S. TMC: BCD
Consolidated Non-U.S. TMC: CWT

In 2017, Bayer conducted a global airline RFP, switched from National to Hertz for car rental and implemented an internal expense reimbursement platform, CombiPay, that allows for centralized payment of Citi credit cards; Bayer now has an individual bill/central pay card program. In 2018, it will require travelers seeking reimbursement to submit receipts only for purchases of \$50 or more. The previous threshold was \$25.

Bayer's annual revenue was \$35 billion in 2017. The company's spending on U.S.-booked air volume fell by \$2.9 million in 2017, but it expects the number to bounce back to \$64 million this year. Of its 2017 U.S.-booked airline tickets, 75 percent were purchased on an approved online channel, and 45 percent of that volume was booked without an agent. Sixty-five percent of Bayer's U.S.-booked air spend was for international travel. Bayer has a single travel policy for the U.S., and BCD Travel handled 45 percent of Bayer's 2017 U.S.-booked air volume.

67 OMNICOM GROUP NEW YORK CITY

2017 U.S.-Booked Air Volume: \$61 million

U.S.-booked air spending at marketing and communications giant Omnicom Group declined nearly 8 percent in 2017, according to a BTN estimate. Omnicom is comprised of advertising agency networks BBDO, DDB and TBWA, along with Omnicom Media Group and the DAS Group of Companies, which collectively operate more than 1,500 marketing, PR and other agencies. Omnicom's business travel contributed to about 158,000 metric tons of carbon dioxide equivalent in 2017, down from 176,000 in 2016. The company encourages the use of videoconferencing in lieu of travel and suggests combining multiple business trips to limit environmental impact. Omnicom's 2017 revenue dropped 0.9 percent to \$15.3 billion, with currency conversion rates a factor. Operating expenses decreased 1.4 percent to \$13.2 billion while salary and service costs, which include client-related travel spend, dropped 1.7 percent to about \$11.2 billion. The company at the end of 2017 had 77,300 employees, down from 78,500 one year before.

68 P&G CINCINNATI

2017 U.S.-Booked Air Volume: \$60 million
Principal Expense Supplier: Concur
Consolidated Global TMC: Egencia

P&G increased its U.S.-booked air volume by \$3 million in 2017,

according to BTN's estimate. The company has continued to reduce headcount year over year, reporting 92,000 employees for the 2018 fiscal year, which ended June 30, compared with 95,000 the year prior. Net sales, however, rose 2.6 percent year over year for the fiscal year. The company has been working in recent years to consolidate and centralize travel management across many of its geographic locations. P&G also has been rolling out Concur Expense across its brands.

69 EPIC SYSTEMS VERONA, WIS.

2017 U.S.-Booked Air Volume: \$58.1 million

Epic Systems' U.S.-booked air volume increased \$5.1 million in 2017. The company—which develops, installs and supports electronic record keeping software for healthcare providers and organizations—controls a quarter of the U.S. hospital market for electronic health records.

70 COGNIZANT TEANECK, N.J.

2017 U.S.-Booked Air Volume: \$58 million

2017 Global Air Volume: \$86.5 million

Principal Air Suppliers: United, American & Delta
Principal Hotel Suppliers: Marriott, InterContinental & Hilton
Principal Car Rental Suppliers: Enterprise/National & Avis/Budget
Principal Global Online Booking Tool: Concur
Principal Global Expense Supplier: Concur
Principal Payment Supplier: American Express
Consolidated U.S. TMC: BCD

In 2017, Cognizant selected Avis/Budget for North America car rental. It also completed a travel management company RFP in 2017 and was consolidated globally with HRG as of Jan. 8, 2018, replacing American Express Global Business Travel in India and BCD for the rest of the world. As part of its TMC RFP process, it selected HRG's 24/7 follow-the-sun model for most of its markets to improve their traveler experience. In 2018, Cognizant plans to implement Concur Travel & Expense in India. Cognizant's U.S.-booked air volume rose \$5 million in 2017, and the company expects that volume to stay put this year. Of 2017's U.S.-booked air volume, 76 percent was for domestic travel. Eighty percent of Cognizant's total U.S.-booked airline tickets were made through the company's approved online tools, and of that, 95 percent was booked without an agent. Annual revenue for the company was \$14 billion, up 3.7 percent from 2016. The company has an individual bill/central pay card program and a single global travel policy.

71 21ST CENTURY FOX NEW YORK CITY

2017 U.S.-Booked Air Volume: \$57.2 million

2017 U.S. T&E: \$77 million

Principal Air Suppliers: American, Delta & British Airways
Principal Hotel Suppliers: Marriott, InterContinental & Hilton

Principal Car Rental Suppliers: National/Enterprise & Hertz
Principal U.S. Online Booking Tool: GetThere
Principal Non-U.S. Online Booking Tool: Concur
Principal U.S. Expense Supplier: PeopleSoft & Concur
Principal Payment Supplier: American Express
Consolidated Global TMC: HRG

In 2017, the company implemented a global travel program in 95 percent of its countries, implemented Conferma virtual card payment for hotels in the U.S. and rolled out American Express' Business Travel Account centralized billing accounts for air globally. 21st Century Fox saw its U.S.-air booked volume rise half a million dollars from 2016 and expects it to stay at \$57.2 million in 2018. U.S. T&E was \$77 million. Eighty-six percent of its U.S.-booked airline ticket volume was made through the company's approved online tools, 68 percent of that booked without an agent. Of the company's total U.S. air booked dollar volume, 59 percent was for domestic travel. Its corporate card program is individual bill/individual pay. In July 2018, Disney won a bidding war against Comcast to acquire 21st Century Fox.

71 IPG NEW YORK CITY

2017 U.S.-Booked Air Volume: \$57.2 million
2017 Global Air Volume: \$85.7 million
2017 U.S. T&E: \$200.9 million
2017 Global T&E: \$278 million
Principal U.S. Online Booking Tool: Concur
Principal Non-U.S. Online Booking Tool: GetThere
Principal U.S. Expense Supplier: Concur
Principal Non-U.S. Expense Supplier: SAP/Vantage
Principal Payment Supplier: American Express
Consolidated U.S. TMC: Amex GBT
Primary Non-U.S. TMCs: Amex GBT, HRG, Bay Travel & Mohebi Aviation

IPG's U.S.-booked air volume dropped by \$1.8 million in 2017. IPG predicts that volume will fall to \$56.3 million this year. Fifty-six percent of U.S.-booked airline tickets were for international travel. Ninety-six percent of 2017 U.S.-booked air spend went through approved online tools, and 96 percent of that was completed without agent assistance. The company's corporate card program is individual bill/central pay.

73 SHIRE DUBLIN

2017 U.S.-Booked Air Volume: \$57 million
Primary Global TMC: BCD

Biopharmaceutical company Shire launched 50 products in 25 countries in 2017, increased its pro forma product sales growth by 8 percent to \$14.4 billion, an increase of over \$1 billion. It invested \$1.8 billion in R&D last year and in 2018 plans targeted investments in its manufacturing infrastructure, product launches and clinical pipeline. In 2017, it cut its carbon emissions, including those from business travel. As of the end of the year, it employed 23,044 in over 60 countries.

74 AMGEN THOUSAND OAKS, CALIF.

2017 U.S.-Booked Air Volume: \$56.8 million
Principal Air Suppliers: Star Alliance & SkyTeam
Principal Hotel Suppliers: Marriott, Hilton & Hyatt
Principal Car Rental Supplier: Hertz
Principal Global Booking Tool: Concur
Principal Global Expense Supplier: Concur
Principal U.S. Payment Supplier: American Express
Consolidated Global TMC: CWT

Amgen's U.S.-booked air volume rose \$5.8 million in 2017. Forty-eight percent of U.S.-booked air volume was for domestic travel in 2017. Sixty-nine percent of U.S. point-of-sale air bookings went through approved online tools, 84 percent of those representing touchless transactions. The company, which had \$23 billion in revenue in 2017, estimates that its U.S.-booked air volume will rise to \$58 million in 2018.

The pharmaceutical and biotechnology firm moved travel, meetings and corporate card under one leader; migrated to a single global distribution system; consolidated the in-country travel services of 29 European, Middle East and Asia countries and the U.S. after-hours into one service center in Poland and the services for three countries in South America into one service center in Colombia. The company also changed the point-of-sale fee structure as part of its globalization efforts. For cost savings, Amgen implemented in the U.S. Trondent's pretrip approval software, as well as behavioral incentive tool Rocketrip. The company also added Uber as preferred ground transportation supplier.

Amgen's goals for 2018 are to deploy globally with Trondent's pretrip approval, as well as Yapta's FareIQ and HotellIQ. The company aims to implement Booking.com content in its online booking tool and to define a global meetings policy and travel process. Currently, each country manages its own meetings. Amgen uses an individual pay/individual bill card model and has a single global travel policy.

75 MARSH & McLENNAN COS. NEW YORK CITY

2017 U.S.-Booked Air Volume: \$55.6 million
2017 Global Air Volume: \$112.1 million
2017 U.S. T&E: \$130 million
2017 Global T&E: \$245 million
Principal Air Suppliers: Delta & United
Principal Hotel Suppliers: Marriott, Hilton & AccorHotels
Principal Car Rental Suppliers: Hertz & National
Principal U.S. Online Booking Tool: GetThere
Principal Global Expense Supplier: Oracle
Principal Payment Supplier: American Express
Primary U.S. TMC: BCD
Consolidated Non-U.S. TMC: BCD

In 2017, 58 percent of Marsh & McLennan's U.S.-booked air volume was for domestic travel. The company estimates a slight uptick in U.S.-booked air volume to \$56 million for 2018. Marsh & McLennan focused on travel cost containment and increasing compliance with the travel management company, corporate card and preferred travel suppliers. The company also optimized its hotel program relationships by moving to multiyear agreements. In 2018, it will focus on traveler communications and engagement. The company also is

looking to streamline travel processes. Its corporate card program is individual bill/individual pay. The firm had \$14 billion in revenue in 2017.

76 AIRBUS GROUP LEIDEN, NETHERLANDS

2017 U.S.-Booked Air Volume: \$55 million

BTN estimates European aerospace corporation Airbus spent \$55 million on U.S.-booked air in 2017. The company reported stable revenue in 2017—66.8 billion euros compared with 66.6 billion in 2016—and its number of employees declined 3 percent in 2017 to 129,442.

76 ALLSTATE NORTHBROOK, ILL.

2017 U.S.-Booked Air Volume: \$55 million

2017 Global Air Volume: \$57 million

2017 U.S. T&E: \$290 million

2017 Global T&E: \$315 million

Principal Air Suppliers: United, Delta & Southwest

Principal Hotel Suppliers: Marriott, Hilton & InterContinental

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

Principal U.S. Online Booking Tool: Concur

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

Principal Global Expense Supplier: Concur

Principal Payment Supplier: Citi

Consolidated U.S. TMC: Travel and Transport

Consolidated Non-U.S. TMC: Radius Partners

Allstate deployed an award-winning strategic meetings management program last year. The company, which works with Cvent, identified \$105 million in 2017 U.S. meetings spend on top of \$185 million in nonmeetings T&E. Allstate expects U.S. T&E to stay at \$290 million in 2018. The company also expects U.S.-booked air volume to remain at \$55 million. It rose from \$52 million in 2016. Global air volume dropped from \$64 million in 2016 to \$57 million in 2017. As carriers have implemented basic economy fares, Allstate has taken steps to hide them from travelers' booking options.

The company, whose revenue reached \$38 billion in 2017, has a single travel policy for more than 80 percent of its travel spend. Ninety percent of Allstate's travel is domestic. Ninety-three percent of U.S.-booked air volume went through approved online tools in 2017, and 93 percent of that required no agent assistance. The company's card program is individual bill/central pay.

76 SALESFORCE SAN FRANCISCO

2017 U.S.-Booked Air Volume: \$55 million

Principal Global Online Booking Tool: Concur

Principal Global Expense Supplier: Concur

Consolidated Global TMC: BCD

Salesforce's U.S.-booked air spend rose \$10 million, or 18 percent, in 2017 as revenue increased 26 percent to \$8.4 billion. The enterprise software company employed more than 25,000 people across 25 countries as of the end of 2017.

79 BP LONDON

2017 U.S.-Booked Air Volume: \$54 million

BP's U.S.-booked air volume fell by \$16 million in 2017. The company operates in 70 countries and had 18,300 retail sites at the end of 2017, 300 more than a year prior, while headcount dipped by 500 to 74,000. BP launched seven major oil and gas extraction projects: two in Egypt, two in Trinidad, one in the North Sea, one in Australia and one in Oman. This year, it plans to start two more in Egypt, one in the North Sea, one in Azerbaijan, one in the U.S. and one in Russia.

80 PEPSICO PURCHASE, N.Y.

2017 U.S.-Booked Air Volume: \$53 million

Principal Expense Supplier: Concur

Consolidated U.S. TMC: Amex GBT

BTN estimates that PepsiCo spent \$53 million on U.S.-booked air in 2017. The beverage and snack food conglomerate operates under a uniform travel policy but uses a mix of travel management companies across the globe. Net revenue for the company and its subsidiaries grew 1 percent year over year to \$63.5 billion in 2017.

81 SAMSUNG SEOUL, SOUTH KOREA

2017 U.S.-Booked Air Volume: \$52.5 million

Principal Air Suppliers: United, American & Delta

Principal Hotel Suppliers: Marriott, Hilton, & InterContinental

Principal Car Rental Suppliers: National & Hertz

Principal U.S. Online Booking Tool: GetThere

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

Principal Expense Supplier: Proprietary tool

Principal Payment Supplier: Visa

Consolidated U.S. TMC: Samsung Hospitality America

Corporate Travel Department

Consolidated Non-U.S. TMC: Samsung Business Travel Management

Samsung, which is an accredited Corporate Travel Department, is implementing corporate booking tools in the U.S. this year. Of its 2017 U.S.-booked air volume, 60 percent was for domestic travel. The company expects its U.S.-booked air volume to fall to \$50 million in 2018. Only 3 percent of U.S.-booked air tickets were made through approved online tools in 2017. Last year, the company adjusted its hotel rate caps in key cities. It has a single global travel policy and an individual bill/individual pay card program. Samsung's revenue was \$223 billion in 2017, up from 2016's \$174 billion.

82 DANAHER WASHINGTON, D.C.

2017 U.S.-Booked Air Volume: \$52 million

Danaher—a conglomerate that specializes in environment, life sciences, diagnostics and dental products—has had several years of busy M&A activity,

including investing about \$400 million to acquire 10 businesses last year. But that was quiet compared with the previous year, which included the \$4 billion buy of Cepheid. BTN estimates that Danaher cuts its U.S.-booked air by about \$6 million in 2017. Sales for the year were up 8.6 percent to \$18.3 billion. Danaher added about 5,000 associates to its roster in 2017 for a total of 67,000 employees. BCD is one of the company's two primary travel management companies.

82 STRYKER KALAMAZOO, MICH.

2017 U.S.-Booked Air Volume: \$52 million

Consolidated U.S. TMC: BCD

Primary Non-U.S. TMC: BCD

Medical device and equipment manufacturer Stryker slightly cut its U.S.-booked travel spend by \$2 million in 2017, according to a BTN estimate. The company reported that net sales increased 9.9 percent year over year to \$12.4 billion, and headcount remained steady at 33,000.

84 DAIMLER STUTTGART, GERMANY

2017 U.S.-Booked Air Volume: \$51 million

Principal Global Online Booking Tool: Cytric

Principal Payment Supplier: AirPlus International

Consolidated Global TMC: BCD

A culture of efficiency and relative conformity laid the foundation for Daimler's break from travel management complexity in 2017—at least for the traveler. Daimler began last year to roll out a "digitalized" program, now known as the FiveStar travel program, to reduce the travel process to three clicks. Click 1: The traveler confirms on a mobile app where and when he or she wants to travel and what combination of air, hotel and car rental is required. Click 2: The app returns a single trip recommendation that the traveler is expected to approve. Click 3: The traveler approves an expense report after the system has centrally and invisibly paid for the trip. The platform emerged from user testing in the U.S. and Canada in 2017 and in 2018 is rolling out to Daimler's Mercedes-AMG division in Stuttgart; there are plans to go global.

The goal is to recapture 25 million euros in lost employee productivity tied to administrative tasks associated with travel. Daimler has outsourced or dispensed with its focus on supplier management in recent years. It only negotiates airline deals for long-haul routes and has shifted hotel sourcing to specialist HRS. This has freed internal efforts to focus on traveler management and finding ways to liberate Daimler travelers to get on with their work. The company has also eliminated pretrip approval.

Daimler's spend on U.S.-booked air travel rose \$3 million in 2017, and the company expects it to rise another \$2 million in 2018 to \$53 million. The automaker's revenue increased 7.2 percent to 164.3 billion euros in 2017. Daimler has a single global travel policy.

84 ITW GLENVIEW, ILL.

2017 U.S.-Booked Air Volume: \$51 million

Principal Air Suppliers: United, Delta & American

Principal Global Online Booking Tool: Concur
Principal Global Expense Supplier: Concur
Principal Payment Supplier: American Express
Consolidated U.S. TMC: Amex GBT
Primary Non-U.S. TMC: Amex GBT

In 2018, ITW reduced the end-to-end cost of travel but brought more transactions into its managed travel program as it implemented its T&E platform more broadly. ITW enjoys 85 percent compliance with Concur's online booking tool globally. The industrial equipment manufacturer launched a project to make its T&E policy more effective, simplify reimbursement and address tax reform. The company also implemented value-added tax reclaim in the U.S. and several additional countries, having begun working with VAT company Taxback International four years ago. ITW also implemented Concur Locate & Active Monitoring, which streamlines traveler tracking thanks to Concur's TripLink data feed from suppliers and Concur Locate's integration with Healix International, which provides a data feed on adverse events and aids with traveler outreach.

84 JOHNSON CONTROLS MILWAUKEE

2017 U.S.-Booked Air Volume: \$51 million

Johnson Control's U.S.-booked air volume fell \$3.3 million in 2017, according to a BTN estimate. In September 2016, the diversified technology and multi-industrial company merged with fire and security provider Tyco, bringing the employee roster as of that month to 121,000 employees. Of those, 44,000 were employed in the U.S. The company is "linking complementary branch networks and independent channels to drive global growth, enhancing the revenue and earnings growth profile," according to a statement about the merger. Net revenue reached \$30.2 billion last year. The company continues to focus on growing its building technologies and solutions division and its power solutions division.

87 BOSTON SCIENTIFIC MARLBOROUGH, MASS.

2017 U.S.-Booked Air Volume: \$50.6 million

The medical device manufacturer saw its U.S.-booked air volume drop \$6.3 million in 2017, driven by a revision to its business class policy and a continued focus on reducing overall expenses. It acquired two companies last year and employed 29,000 as of the end of the year. The company invested nearly \$1 billion in R&D in 2017 and grew sales revenue 7 percent. It also expanded into global markets; sales from emerging markets rose 15 percent year over year. Sales in China grew 20 percent.

88 3M ST. PAUL MINN.

2017 U.S.-Booked Air Volume: \$50 million

2017 Global Air Volume: \$93.1 million

2017 U.S. T&E: \$136.4 million

2017 Global T&E: \$283 million

Principal Air Suppliers: Delta, American & United

Principal Hotel Suppliers: Hilton, Marriott & InterContinental

Principal Car Rental Suppliers: National/Enterprise

Principal U.S. Online Booking Tool: Concur

Principal Non-U.S. Online Booking Tool: e-Travel Management

Principal Global Expense Supplier: Concur

Principal Payment Supplier: Citi Mastercard

Primary U.S. TMC: CWT

Consolidated Non-U.S. TMCs: CWT & BCD

2017 was a year of implementation and supplier changes for 3M, whose revenue rose from \$30 billion in 2016 to \$51 billion in 2017. The manufacturing company completed its rollout of Concur Travel & Expense in Latin America and finished the first phase of implementation in Asia/Pacific. In addition, the percentage of 3M travelers who use approved online tools for U.S. point-of-sale air bookings has ticked up from 88 percent to 90 percent. Eighty percent of U.S.-booked air volume required no agent assistance in 2017, up from 70 percent in 2016 and 50 percent in 2015. During 2017, 3M mandated that hotel bookings go through designated channels. The company's U.S.-booked air volume rose \$5.8 million in 2017, a heavy contributor to 3M's \$9.6 million rise in U.S. T&E. The company estimates U.S.-booked air volume will stay at \$50 million in 2018. Global T&E rose \$41 million, including a \$25.8 million increase in global air volume.

In 2017, 3M expanded its list of preferred carriers to include American and United. Upon the closing of Marriott's acquisition of Starwood, InterContinental has jumped onto the list of 3M's primary hotel suppliers. The company has a single global travel policy. Three-fourths of its U.S.-booked air volume was for domestic travel. Carlson Wagonlit Travel handled 99 percent of U.S.-booked air volume. The company uses an individual bill/central pay card program. 3M's partnership with CWT and BCD, along with the deployment of Concur globally, is providing a standardized approach to booking travel and expense reporting via Concur. This has greatly enhanced travel policy adherence and compliance and has improved the integrity of the company's travel spend, thus providing a more accurate view of global volume.

88 LILLY INDIANAPOLIS

2017 U.S.-Booked Air Volume: \$50 million

2017 Global Air Volume: \$102 million

2017 U.S. T&E: \$164.4 million

Principal Air Suppliers: United, Delta & American

Principal Hotel Suppliers: Marriott, Hilton & InterContinental

Principal Car Rental Supplier: Enterprise Holdings

Principal U.S. Online Booking Tool: Concur

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

Principal Global Expense Supplier: Concur

Principal Payment Supplier: US Bank

Consolidated Global TMC: CWT

Global pharmaceutical company Lilly assessed its global airline and credit card programs in 2017, and in 2018, it is working on RFPs, contracts and implementations for hotel, car rental, ground transportation and airline globally. It also assessed its Asia/Pacific ground transportation program last year and implemented a new one. For corporate cards, the company works with US Bank in the U.S. and Citi elsewhere and is rolling out Citi

globally. Lilly uses a central bill/central pay card program.

Also in 2017 in the U.S., Lilly implemented Uber, Lyft, the CWT to Go app and corporate dining savings platform Dinova. It continued to roll out Yapta's FareIQ and RoomIQ rate-tracking technologies in the U.S. and Europe and will continue as they become available in other regions.

U.S.-booked air volume fell \$11 million to \$50 million in 2017, but Lilly expects it to rise to \$55 million this year. Of its 2017 U.S.-booked air volume, 44 percent was for domestic travel. Bookings made through approved channels rose to 68 percent; 65 percent of those were booked without an agent, down from 79 percent in 2016. U.S. T&E fell significantly, from \$225 million in 2016 to \$164.4 million.

Following IBM's sunset of its Global Expense Reporting Solutions system, Concur, which already was Lilly's primary U.S. expense supplier, became the company's global expense supplier. On Jan. 1, 2018, the company's global travel policy became active, replacing over 100 local policies. Lilly plans to implement Concur in 28 countries in 2018 and another 12 in the first quarter of 2019.

90 BARCLAYS LONDON

2017 U.S.-Booked Air Volume: \$49 million

Barclays' U.S.-booked air volume fell \$3 million in 2017, according to a BTN estimate. The British investment bank spent 150 million pounds on travel and accommodation in 2017, down 14 million from 2016. The financial services firm closed its noncore business units and sold its stake in its African subsidiary, Barclays Africa. The firm's total income was 14.3 billion pounds, down 4 percent from 2016. Barclays reduced its carbon emissions, including those from business travel, by 26.1 percent in 2017, a significant step toward the company's target of 30 percent reduction by 2018.

90 COCA-COLA ATLANTA

2017 U.S.-Booked Air Volume: \$49 million

Coca-Cola's U.S.-booked air spend dropped \$19 million in 2017, according to a BTN estimate. It's payroll also dropped by 38,500 to 61,800 employees as it returned ownership of its bottling operations to its local partners in the U.S. and China and implemented other productivity initiatives. In April 2017, the company announced it would simplify and standardize key transactional processes and provide support to business units through global centers of excellence.

90 VIACOM NEW YORK CITY

2017 U.S.-Booked Air Volume: \$49 million

BTN estimates that Viacom's U.S.-booked air spend fell \$5 million in 2017. As of Sept. 30, 2017, the end of the media company's fiscal year, the company employed 10,750 full-time and part-time people, plus 900 project-based staffers. BCD manages a significant portion of the company's travel, as well as talent travel.

93 AON LONDON

2017 U.S.-Booked Air Volume: \$48.2 million

2017 Global Air Volume: \$90.7 million

2017 U.S. T&E: \$113.9 million

2017 Global T&E: \$266.1 million

Principal Air Suppliers: United, American & Delta

Principal Hotel Suppliers: Marriott, Hilton & Hyatt

Principal Car Rental Supplier: Avis/Budget

Principal Global Online Booking Tool: GetThere

Principal Global Expense Supplier: Workday

Principal Payment Supplier: American Express

Consolidated Global TMC: CWT

In 2017, Aon divested of its outsourcing business including the separation of travel operations and associated contracted spend. In addition, the business realized significant growth through acquisitions, requiring the integration of policies and consolidation of travel spend into its existing global program structure. Most significantly, the company implemented a demand management program that drove a 9 percent reduction in travel spend through a partnership with its business units based on a reduction in travel demand, policy compliance and overall reductions in pricing.

In 2018, the firm will continue efforts to manage demand and costs in order to offset anticipated growth across geographies. Areas of focus include implementing an alternative lodging category strategy, refining existing travel tools to deliver a more intuitive experience, implementing a new mobile booking experience and launching a suite of business unit-level reporting to provide greater visibility into program performance and progress against goals. The team also will assess its current program and build business requirements from which it will drive a consistent and scalable service model that allows the firm to achieve its travel management objectives and deliver a superior and sustainable traveler experience.

Ninety percent of Aon's 2017 U.S.-booked airline tickets were made through the company's approved online tools; 81 percent of those were completed without an agent. Sixty-three percent of Aon's 2017 U.S.-booked dollar volume was for travel within the U.S. The company has replaced the Oracle PeopleSoft expense management system with Workday. Aon has an individual bill/individual pay corporate card program.

94 WPP LONDON

2017 U.S.-Booked Air Volume: \$48 million

Primary U.S. TMC: BCD

WPP's U.S.-booked air spend dropped \$4 million in 2017, according to a BTN estimate. It employs 134,428 people and operates 3,000 offices in 112 countries. Air travel represented 39 percent of its carbon footprint, producing 89,518 tons of carbon emissions. To reduce emissions, WPP used cost controls and raised its video-conferencing facilities to 700 in 155 cities to decrease air travel by 4 percent. The British multinational advertising and PR company offset its remaining air travel emissions by purchasing carbon

credits. WPP revenue rose 6.1 percent to 55.6 billion pounds in 2017, 40 to 45 percent of that from developing markets, according to the company's annual report.

95 VERIZON NEW YORK CITY

2017 U.S.-Booked Air Volume: \$46 million

2017 Global Air Volume: \$51 million

2017 U.S. T&E: \$180 million

2017 Global T&E: \$205 million

Principal Air Suppliers: American, United & Delta

Principal Hotel Suppliers: Marriott, Hilton & InterContinental

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

Principal Global Booking Tool: Concur

Principal Payment Supplier: American Express

Consolidated Global TMC: Amex GBT

In 2017, just over 90 percent of Verizon's air spend was for domestic travel. It has consolidated U.S., EMEA and Latin America travel booking activity with Concur, supported by Concur Expense. Ninety-six percent of U.S.-originating air spend was booked through Verizon's online tools in 2017. The company has introduced mobile booking tools and a strategic meetings management program.

96 PUBLICIS GROUPE PARIS

2017 U.S.-Booked Air Volume: \$45.8 million

Advertising and PR company Publicis Groupe's revenue dropped 0.4 percent to 9.7 million euros in 2017. It employed 77,767 at the end of 2017, a slight drop from 78,913 a year prior. Publicis acquired six companies in 2017, and it expects the Chinese government to approve the firm's sale of a Chinese subsidiary by the end of 2018.

97 DEUTSCHE BANK FRANKFURT, GERMANY

2017 U.S.-Booked Air Volume: \$45 million

2017 Global Air Volume: \$154 million

2017 U.S. T&E: \$88 million

2017: Global T&E: \$366 million

Principal Payment Supplier: American Express

Consolidated U.S. TMC: HRG

Primary Non-U.S. TMCs: Amex GBT & BCD

Last year, Deutsche Bank's travel team—which handles travel, fleet and meetings management—added card program and expense management to its roster of responsibilities. It also focused on reducing costs, optimizing processes and automation. It expanded its online booking tools to nine additional countries, and a campaign to change traveler behavior—advance booking, restricted fares, limited ticket changes and higher OBT use—has decreased the average trip cost. Eighty percent of U.S.-booked

air spend came through approved online tools, and 40 percent of those were completed without an agent's help. Additionally, 95 percent of travel is preapproved. U.S.-booked air spend for Deutsche Bank fell \$4 million in 2017 and is projected to stay the same in 2018.

In 2018, the company aims to make its expense management platform and processes more efficient and again push down costs. It's looking at opportunities like artificial intelligence tools for expense and perhaps booking and will look at post-ticketing price assurance airfare tools.

The bank has a single global travel policy. Eighty percent of the organization's 2017 U.S.-booked air volume was for domestic travel. Deutsche Bank's card program is individual bill/central pay.

98 CATERPILLAR DEERFIELD, ILL.

2017 U.S.-Booked Air Volume: \$44.4 million

2017 Global Air Volume: \$76.7 million

2017 Global T&E: \$220 million

Principal Air Suppliers: United & Delta

Principal Hotel Suppliers: Hilton, InterContinental & Marriott

Principal Car Rental Suppliers: National & Enterprise

Principal U.S. Online Booking Tool: Concur

Principal Non-U.S. Online Booking Tool: e-Travel Management

Principal Global Expense Supplier: Concur

Principal Payment Supplier: US Bank

Consolidated Global TMC: BCD

In 2017, Caterpillar, whose revenue was \$45.5 billion in 2017, improved the discounts and reporting it receives from its airline partners. The company has a single global policy but last year reduced the number of regional exceptions in its air policy. This year, it plans to clarify its premium class policy and decide whether to remove premium economy. Caterpillar's U.S.-booked air spend rose \$8.5 million in 2017, and the manufacturer projects a similar increase, \$8.6 million, this year. Of the company's 2017 U.S.-booked air spend, 56 percent was for international travel. Three-fourths of Caterpillar's 2017 U.S.-booked airline tickets went through approved online tools, and 70 percent of those required no agent assistance. The company's card program is individual bill/central pay.

98 HEWLETT PACKARD ENTERPRISE PALO ALTO, CALIF.

2017 U.S.-Booked Air Volume: \$44.4 million

Principal Air Suppliers: United & Delta

Principal Hotel Suppliers: Marriott & Hilton

Principal Car Rental Supplier: Avis

Principal Global Online Booking Tool: Concur

Principal Global Expense Supplier: Proprietary tool

Principal Payment Supplier: Citi

Primary U.S. TMC: CWT

Consolidated Non-U.S. TMC: CWT

In 2017, Hewlett Packard Enterprise completed two successful divestitures, and its U.S.-booked air volume fell 66 percent in 2017 from 2016's \$131 million. The company also implemented Citi corporate cards globally, and the travel team met its targets for costs and total value and drove compliance to its strategic meetings management program. In terms of travel policy changes, HPE reduced the number of travelers categorized as executive, eliminated black car service for executives, implemented a pretrip approval tool and implemented meal/catering restrictions. In 2018, the company plans to review its business class travel policy, as well as its train strategy and policy.

Carlson Wagonlit Travel handled 82 percent of HPE's U.S.-booked air volume in 2017. Seventy-one percent of the company's U.S.-booked air volume was for domestic travel. Eighty-four percent of U.S.-booked air volume was done on approved online channels, 57 percent of that without the help of an agent. The company has a single global travel policy and an individual bill/central pay card program. Total revenue for the company was \$37.4 billion.

100 BAE SYSTEMS ARLINGTON, VA.

2017 U.S.-Booked Air Volume: \$43 million

2017 U.S. T&E: \$108 million

Principal Air Suppliers: Delta, American & United

Principal Hotel Suppliers: Marriott, Hilton & InterContinental

Principal Car Rental Supplier: Avis Budget Group


Principal U.S. Online Booking Tool: Concur

Principal U.S. Expense Supplier: Concur

Principal Payment Supplier: American Express

Consolidated U.S. TMC: BCD

In 2017, BAE Systems migrated its travel portal in-house and showed the C-suite more travel scorecards. In 2018, the defense, security and aerospace company is improving both preferred hotel compliance and the company's strategic meetings management program. Additionally, starting this year, the company will allow business class on international flights only for flights of six hours or more. BAE Systems' U.S.-booked air volume increased \$2 million in 2017, and the company expects it to rise a similar amount this year. Of BAE's 2017 U.S.-booked air volume, 70 percent was for domestic travel. The company has only U.S. operations and has a single U.S. travel policy. Ninety percent of BAE's total U.S.-booked domestic airline tickets were completed on the company's approved online tools, and 95 percent of those were completed without an agent's help. The company's corporate card program is individual bill/central pay.

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