

# BTN

BUSINESS TRAVEL NEWS

September 30, 2019

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## 2019 CORPORATE TRAVEL 100

BTN'S 32ND ANNUAL LIST OF THE BIGGEST CORPORATE TRAVEL SPENDERS IN THE U.S.

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**CORNING | BP | ITW | EPIC**  
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# High Times for Business Travel

The BTN editorial staff would like to thank BTN executive director of conference content and strategy **David Meyer** for his critical and continued contribution to the Corporate Travel 100. Mr. Meyer conducts BTN's annual Corporate Travel 100 survey, as well as the personal interviews that are the foundation of this issue.

BY ELIZABETH WEST

Corporate travel came on strong in 2018. Total U.S.-booked air spend by the top 100 corporate travel spenders in the U.S. surged to \$11.45 billion—more than half a billion dollars above 2017. Spend among this year's top 12 companies alone increased by more than \$300 million, even accounting for No. 2 IBM's reduction. Deloitte, which took over the top spot from IBM in the 2017 list, based on 2016 volume, bolted farther ahead of the pack with an additional \$64 million.

The rise in corporate travel spending went beyond the biggest of the big. Sixty companies on this year's list increased their U.S.-booked air volume in 2018. Thirty companies decreased that spend, and just five remained flat compared to last year. Five that are either new or returning to the list this year are unknown.

## NOTABLE MOVES & SPEND TRENDS

While global accounting and consulting firms have established firm digs at the top of BTN's Corporate Travel 100, technology companies like Microsoft and Amazon are right on on their heels, and IBM has been a perennial fixture at the top of the Corporate Travel 100.

Rising significantly in the ranks this year is Facebook, which moved from No. 32 to No. 18, based on an estimate of its 2018 U.S.-booked air volume. Surges like these aren't typical, especially in the top quarter of the list, where significant movement reflects large dollar values. With Facebook's acquisitions of companies like Instagram and What's App, its corporate travel spend isn't likely to ease.

Even as younger tech companies bolt up the list, more mature names like Cisco and Siemens are moving the other direction. Cisco dropped from No. 11 to No. 35

this year. The company sells TelePresence tools among its vast portfolio and has made a concerted push for employees to use them to defray travel costs. Siemens, which dropped from No. 21 to No. 27, has also cited a push toward virtual collaboration and videoconferencing to reduce travel costs.

Pharmaceutical companies on BTN's CT 100 are reining in their travel costs. Abbvie fell from No. 43 to No. 66 even as revenue increased 16 percent and employment numbers rose in 2018. The company announced its intent to acquire Allergan, another CT 100 pharma company, which tumbled from No. 63 to No. 74 this year.

The merger, however, will make the company a big account on future lists. German pharma company Bayer's U.S. operations dropped from No. 66 to No. 87 this year; Pfizer dropped from No. 36 to No. 45 and Swiss pharma giant Roche fell four spots to No. 24. That said, Indianapolis-based Lilly surged from No. 89 to No. 68. Shire held steady at No. 73.

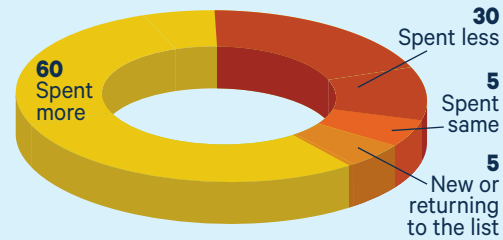
Travel investment at oil and energy companies generally rose in 2018. Royal Dutch Shell jumped 9 spots to No. 28, with a BTN-estimated \$20 million rise in U.S.-booked air volume. BP and Chevron moved modestly up the lower half of the list: Chevron popped four spots to No. 53 and BP rose 11 places to No. 68. Paris-based Schlumberger dropped three spots to tie BP at No. 68. BP made big news in 2019, however, by inking a travel management company deal with Egencia and planning a complete departure from CWT by January 2020.

## EMERGING PRACTICES

A handful of trends stood out this year among companies in the CT 100. The first

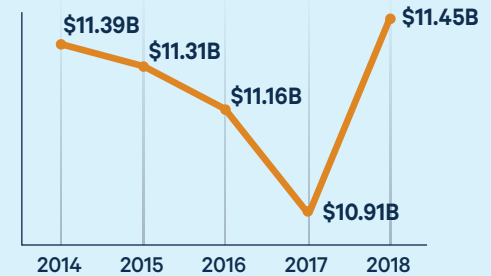
## TRAVEL SPEND TRENDS AMONG BTN'S CT 100

Change in U.S.-booked air spend from 2017 to 2018

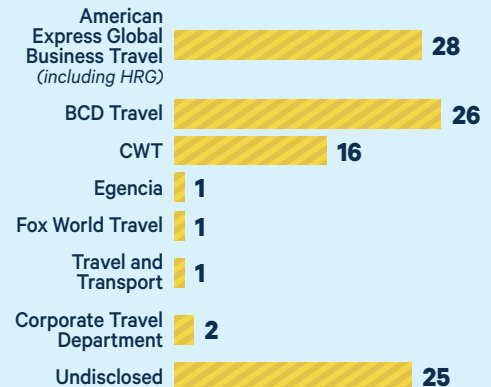


## TRAVEL SPEND TRAJECTORY AMONG BTN'S CT 100

U.S.-booked air spend each year



## CONSOLIDATED U.S. TMCS AMONG BTN'S CT 100 For 2018



CONTINUED ON PAGE 6

**METHODOLOGY:** The CT 100 is based on 2018 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.

## SPONSOR WELCOME LETTERS



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Thank you,

Gabriella Fitzgerald  
Executive Vice President & General Manager  
US Large and Global Clients  
American Express



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Warmly,

Tammy Routh  
Senior Vice President, Global Sales  
Marriott International



Dear Business Partners,

United is proud to sponsor the 2019 Corporate Travel 100, the preeminent study of business travel trends and the companies leading the way. Thanks to BTN for continued corporate travel thought leadership and research.

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Sincerely,

Jake Cefolia  
Senior Vice President–Worldwide Sales  
United Airlines



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Sincerely,


David Seelinger  
Chairman and CEO  
EmpireCLS Worldwide Chauffeured Services

was attention to carbon emissions. The travel industry has come under scrutiny for its contribution to climate change, and CT 100 companies are paying attention to how much their business travel activities contribute to their carbon footprints. Tracking carbon emissions took hold in the financial and tech industries a decade ago. GE, however, reported its travel-related carbon emissions for the first time in 2018. Some companies, such as Apple, are refining their emissions calculations to better account for differences like business class air travel compared with economy class. Good news: Several companies like United Technologies and FedEx are beginning to meet their carbon-reduction goals, and others are reducing emissions and purchasing carbon offsets to mitigate their environmental impact. However, several companies that track emissions have reported larger carbon footprints related to increased travel in 2018.

Traveler-oriented business travel processes and policies continue to penetrate CT 100 companies. At least 20 percent cited some type of focus on easing processes via automation, mobile technologies, personalization and simplifying travel policy. At the same time, companies like Boeing and Nike have very specific efforts underway. Nike cited policy changes to address the effect of travel on employee health and wellness. Boeing is making specific policy changes to cover expenses related to freezing, storing and shipping breastmilk home, addressing concerns for families.

Contractor travel policies and processes emerged as another, smaller, trend among the CT 100 companies. It's likely driven by increased scrutiny by tax authorities of contractor arrangements, particularly in the U.K. but in other countries, as well. Travel policies play into that. If a contractor travels on the company dime or with certain corporate payment mechanisms, it could trigger how tax authorities view an individual's employment status. Precise, enforceable policies and processes mitigate that liability. Moreover, contractor travel has been a morass for many companies, and the tools are emerging to address it.

Another tax-related trend rippling through corporate travel is global immigration tracking. Companies like Accenture, EY, Siemens and 21st Century Fox have or are implementing immigration solutions that will alert managers and travelers not only about required travel documentation but also about whether they have traveled to or stayed in a particular destination for a period of time that obligates them to pay local taxes. Traditionally, tax authorities have focused on expatriates, but these days they are scrutinizing business travelers, as well. ■

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## RANKED BY 2018 U.S.-BOOKED AIR VOLUME

	RANKING		RANKING		
\$559.2M	Deloitte	1	\$85M	Time Warner	50
\$417M	IBM	2	\$83M	General Dynamics	52
\$324M	PwC	3	\$80.1M	Chevron	53
\$315M	Apple	4	\$80M	General Motors	54
\$311.3M	EY	5	\$77.7M	International Monetary Fund	55
\$285M	McKinsey & Co.	6	\$76.7M	Koch	56
\$260M	Accenture	7	\$75M	GSK	57
\$250M	Microsoft	8	\$75M	P&G	57
\$244M	Boeing	9	\$75M	Walmart	57
\$240M	ExxonMobil	10	\$73M	UBS	60
\$239M	Google	11	\$72M	Salesforce	61
\$220M	Amazon	12	\$68M	Cognizant	62
\$200.5M	Lockheed Martin	13	\$65M	Honeywell	63
\$195M	GE	14	\$65M	Pepsico	63
\$195M	The World Bank	14	\$64M	3M	65
\$187M	KPMG LLP	16	\$62M	AbbVie	66
\$183M	Bank of America	17	\$61M	Omnicom Group	67
\$175M	Facebook	18	\$60M	BP	68
\$164M	JPMorgan Chase & Co.	19	\$60M	Lilly	68
\$150M	BCG	20	\$60M	Schlumberger	68
\$145M	Oracle	21	\$60M	WPP	68
\$140M	Citi	22	\$59.4M	IPG	72
\$140M	Johnson & Johnson	22	\$59M	Shire	73
\$138.3M	Roche	24	\$58M	Airbus	74
\$137M	United Technologies	25	\$58M	Allergan	74
\$130M	FedEx	26	\$58M	Toyota Motor North America	74
\$127M	Siemens	27	\$57M	21st Century Fox	77
\$120M	Royal Dutch Shell	28	\$56.8M	Marsh & McLennan Cos.	78
\$120M	Wells Fargo	28	\$55M	Allstate	79
\$118M	Comcast	30	\$55M	Stryker	79
\$117M	Raytheon	31	\$54M	Barclays	81
\$114.5M	TPG	32	\$54M	Thermo Fisher Scientific	81
\$114M	The Walt Disney Co.	33	\$54M	Verizon	81
\$112.5M	Merck	34	\$53M	Corning	84
\$110M	Cisco	35	\$52.7M	Caterpillar	85
\$110M	Dell Technologies	35	\$52.4M	Amgen	86
\$110M	Medtronic	35	\$52M	Bayer U.S.	87
\$105M	Northrop Grumman	38	\$52M	Coca-Cola	88
\$105M	SAP	38	\$51M	Epic	89
\$103M	Abbott	40	\$50.4M	Daimler	90
\$99M	UnitedHealth Group	41	\$50M	Publicis Groupe	91
\$95M	Novartis	42	\$50M	Samsung	91
\$93M	The Church of Jesus Christ of Latter-Day Saints	43	\$50M	UPS	91
\$91M	Sanofi	44	\$49M	Emerson	94
\$90M	Goldman Sachs	45	\$49M	ITW	94
\$90M	Morgan Stanley	45	\$48M	Danaher	96
\$90M	Nike	45	\$47.8M	Boston Scientific	97
\$90M	Pfizer	45	\$47M	Astrazeneca	98
\$89M	Intel	49	\$47M	BAE Systems	98
\$85M	DowDuPont	50	\$46M	AT&T	100

## ALPHABETIZED

	RANKING		RANKING
3M	65	International Monetary Fund	55
21st Century Fox	77	IPG	72
Abbott	40	ITW	94
AbbVie	66	Johnson & Johnson	22
Accenture	7	JPMorgan Chase & Co.	19
Airbus	74	Koch	56
Allergan	74	KPMG LLP	16
Allstate	79	Lilly	68
Amazon	12	Lockheed Martin	13
Amgen	86	Marsh & McLennan Cos.	78
Apple	4	McKinsey & Co.	6
Astrazeneca	98	Medtronic	35
AT&T	100	Merck	34
BAE Systems	98	Microsoft	8
Bank of America	17	Morgan Stanley	45
Barclays	81	Nike	45
Bayer U.S.	87	Northrop Grumman	38
BCG	20	Novartis	42
Boeing	9	Omnicom Group	67
Boston Scientific	97	Oracle	21
BP	68	P&G	57
Caterpillar	85	Pepsico	63
Chevron	53	Pfizer	45
The Church of Jesus Christ of Latter-Day Saints	43	Publicis Groupe	91
Cisco	35	PwC	3
Citi	22	Raytheon	31
Coca-Cola	88	Roche	24
Cognizant	62	Royal Dutch Shell	28
Comcast	30	Salesforce	61
Corning	84	Samsung	91
Daimler	90	Sanofi	44
Danaher	96	SAP	38
Dell Technologies	35	Schlumberger	68
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# 1 DELOITTE NEW YORK

**2018 U.S.-Booked Air Volume:** \$559.2 million  
**2018 U.S. T&E:** \$1.8 billion  
**Primary U.S. Air Suppliers:** American, Delta, United  
**Primary U.S. Hotel Suppliers:** Hilton, Hyatt, Marriott  
**Primary U.S. Car Rental Suppliers:** Avis, Budget  
**Primary U.S. Online Booking Tool:** GetThere  
**Primary U.S. Payment Supplier:** American Express  
**Card Program:** individual bill/central pay  
**Primary U.S. Expense Supplier:** SAP with a custom interface  
**Primary U.S. Travel Risk Management Supplier:** International SOS  
**Consolidated U.S. TMC:** BCD

Deloitte's U.S.-booked air volume rose 13 percent in 2018 from 2017's \$495.1 million, while U.S. T&E rose 14 percent. The firm brought in \$17 billion in revenue in 2018. Its monthly adoption rate for online bookings in the U.S. reached as high as 75 percent in 2018, beating the 2017 record of 74 percent. Across the entire year, the online adoption rate settled at 74 percent, and 88 percent of that booking volume required no agent assistance. The consolidation of procurement and contracting processes produced global agreements for airline, hotel and travel management company, and the firm's global procurement team has expanded to 12 countries and continues to grow. The company's airfare price assurance tool also was enhanced last year to check prices more often per day. For travelers, the firm hosted on-site enrollment events in 2018 for trusted traveler programs, and it reimburses the application fees for travelers who qualify. Of the firm's U.S.-booked air spend, 74 percent was for domestic travel. Deloitte's cost-containment campaign, a strategic effort endorsed by firm leadership, continues in 2019 in order to promote cost-effective travel options. Deloitte plans no changes to travel policy, which varies by country, and will keep up its efforts to consolidate globally and to increase online and mobile adoption.

# 2 IBM ARMONK, N.Y.

**2018 U.S.-Booked Air Volume:** \$417 million  
**Primary Global Online Booking Tool:** Concur  
**Primary U.S. Payment Supplier:** American Express  
**Card Program:** individual bill/central pay  
**Primary U.S. Expense Supplier:** Concur  
**Primary Global Travel Risk Management Supplier:** International SOS  
**Consolidated Global TMC:** Amex GBT

IBM's U.S.-booked air volume is on a downward trajectory. It declined from \$465 million in 2016 to \$430 million in 2017 and another 3 percent in 2018. The company expects that volume to decline slightly again in 2019 to \$415 million. Of 2018 U.S.-booked air volume, 88 percent went through approved online tools and only 13 percent of that required agent assistance. Seventy percent of 2018 U.S.-booked air volume was for domestic travel. Last year, IBM and Travelport released IBM Travel Manager, an artificial intelligence-based dashboard. IBM Travel Manager is used to track, manage and predict spending within IBM's strategic sourcing group. The technology company also is ex-

panding its dynamic hotel pricing model and implementing an air and hotel reshopping initiative. The IT company, which has a single global travel policy, brought in \$79.6 billion in revenue in 2018.

# 3 PWC NEW YORK

**2018 U.S.-Booked Air Volume:** \$324 million  
**Primary Hotel Suppliers:** Marriott, Hilton, Hyatt  
**Primary Car Rental Suppliers:** Hertz, Avis  
**Primary U.S. Online Booking Tool:** Concur  
**Primary U.S. Payment Supplier:** American Express  
**Card Program:** individual bill/central pay  
**Primary U.S. Expense Supplier:** Concur  
**Consolidated U.S. TMC:** Amex GBT

Global accounting giant PwC earned \$41.3 billion in 2018, as its U.S.-booked air volume rose a modest 2 percent from 2017's \$317 million. Of the 2018 U.S.-booked air spend, 80 percent was for domestic travel. Of the tickets booked in the U.S., 90 percent went through approved online tools; the company, which operates in 158 nations, sets policy by country.

# 4 APPLE CUPERTINO, CALIF.

**2018 U.S.-Booked Air Volume:** \$315 million  
**Primary Air Supplier:** United  
**Consolidated Global TMC:** BCD

Tech giant Apple's U.S.-booked air volume increased substantially in 2018, according to a BTN estimate. According to an unintended January disclosure of internal data, by United Apple spends about \$150 million annually on air travel on United Airlines, including \$35 million alone on the San Francisco-Shanghai route with an average 50 business class seats traveled daily. The company's greenhouse gas emissions generated by business travel increased 14 percent in fiscal year 2018, illustrating Apple's increase in travel. Apple last year began calculating its emissions differently to better account for classes of service in air travel. For fiscal year 2018, Apple reported 337,340 metric tons of carbon dioxide equivalent generated by its business air travel and car rentals. Net sales during Apple's 2018 fiscal year, which ended Sept. 30, 2018, increased nearly 16 percent to \$266.6 billion. However, revenue for the last three calendar months of 2018, declined 5 percent year over year to \$84.3 billion. Apple had about 132,000 full-time equivalent employees at the end of its 2018 fiscal year, up from 123,000 one year before.

# 5 EY LONDON

**2018 U.S.-Booked Air Volume:** \$311.3 million  
**2018 Global Air Volume:** \$654.9 million  
**2018 U.S. T&E:** \$931.7 million  
**2018 Global T&E:** \$2.1 billion  
**Primary Air Suppliers:** Delta, United, American  
**Primary Hotel Suppliers:** Marriott, Hilton, Hyatt  
**Primary Car Rental Suppliers:** National, Hertz

# United Airlines

Connecting people and uniting the world is United's shared purpose, and in 2019, we've delivered by elevating our customer experience on an unprecedented scale. We've invested in our industry-leading technology, added more comfort for more customers, and grown our global network.

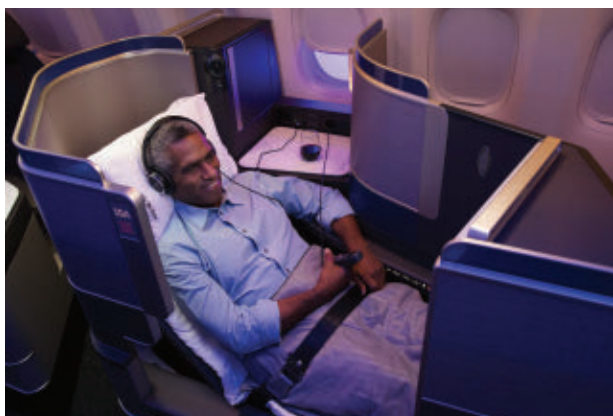
## Leading the Way with Technology

Personalized experiences are a must for travelers, and our technology is answering the call. This year we launched a reimagined United app, the most downloaded airline app, to serve as a mobile traveling companion. Dynamic features anticipate your needs every step of the way and update as you travel. Connecting to your next flight is easier with ConnectionSaver, our new tool that automatically identifies departing flights that can be held for connecting customers, while ensuring those already onboard arrive on time. The tool also sends personalized text messages to connecting travelers (who have opted in) with clear directions to the next gate.

For our corporate partners, United Jetstream® offers the very best in customizable features that make your job easier every day. From self-serve amenities to on-demand reporting, we give you the control to manage your United business in the way that works best for you. We added the new United Meetings to the portal this year, enabling planners to set up a new agreement in seconds, view the number of tickets purchased or flown, and redeem rewards in real time. In Q4 2019, United PassPlus® customers will also be able to leverage the power of United Jetstream.

## More Comfort for More Customers

Finding a premium cabin seat on top business routes is easier than ever. We're making more customers more comfortable by adding more than 1,600 United Polaris® business class and United First®



seats to nearly 250 international and domestic aircraft. Additionally, we're revolutionizing the regional flying experience by becoming the first airline in the world to welcome the two-cabin, 50-seat Bombardier CRJ-550 aircraft to our fleet, offering customers on key regional routes more legroom, storage and amenities than any other 50-seat regional aircraft operating today.

## A Network Built Around You

Customers are looking for distinctive destinations, whether for business or to satisfy wanderlust, and we're meeting this challenge by adding new markets at an unprecedented pace. In the past two years, our route map gained nearly 100 new domestic routes and 22 new international destinations making it easy to explore new places around the globe. We've opened non-stop travel to unique cities such as Porto, Portugal and Reykjavik, Iceland, and will soon offer the only non-stop service between New York/Newark and Cape Town, South Africa (pending government approval).

Backed by hubs in the key U.S. business centers, we also offer one of the best route networks for business travel. We're the only U.S. airline flying to Singapore non-stop, we serve Sydney from three hubs, and we offer the most business class seats of any U.S. carrier between the New York area and London. In 2020 we will add service to Tokyo's close in Haneda Airport from Chicago, Los Angeles, New York/Newark and Washington D.C.

These changes are just the beginning as we fly higher with you at the heart of our service. Thank you for your business and we look forward to welcoming you on a United flight soon.



Learn more about our corporate travel portfolio at [united.com/business](https://united.com/business).

**Primary U.S. Online Booking Tool:** GetThere  
**Primary U.S. Payment Supplier:** American Express  
**Card Program:** individual bill/individual pay  
**Primary U.S. Expense Supplier:** proprietary system  
**Consolidated U.S. TMC:** Amex GBT

EY launched a travel management company RFP and implemented a new TMC in both Asia/Pacific and Latin America in 2018. It also released an individual traveler dashboard that delivers insights into booking behaviors and how travelers' decisions impact cost, efficiency and the environment; a total of 50,000 reports were sent to individuals. The company implemented an additional 15 robotic processes to support cost management, compliance and employee engagement. A new hotel program—for which BTN named EY global travel, meetings and events leader Karen Hutchings its 2018 Travel Manager of the Year—eschews the traditional RFP process for dynamic pricing linked to city caps. In 2019, EY expects to complete an air RFP to simplify contracts. It also is updating its travel policy and its meetings and events policy and is improving the travel team's homegrown travel approval tool.

The professional services firm's global travel guidelines outline the maximum allowance any country can have. Each country is permitted to be more restrictive. The overarching global travel guidelines have been amended to take into account the new entrants into the travel arena, but the basic allowances remain unchanged. Eighty-seven percent of 2018 U.S.-booked air went through approved online channels. Of those, 82 percent required no agent assistance.

EY generated \$34.8 billion in revenue in 2018. Its U.S.-based air volume rose 11 percent from 2017's \$280.7 million, and the company expects it to rise 9 percent in 2019 to \$338.4 million. Of 2018 U.S.-booked air volume, 72 percent was for domestic travel. American Express Global Business Travel handled all of EY's U.S. business in 2018 and 10 percent of its non-U.S. business. HRG handled 60 percent of non-U.S. business, CWT handled 27 percent and Uniglobe the remaining 3 percent.

## 6 **McKINSEY & CO.** NEW YORK

**2018 U.S.-Booked Air Volume:** \$285 million  
**Consolidated U.S. TMC:** Amex GBT

BTN estimates that privately held consulting giant McKinsey & Co.'s U.S.-booked air travel rose more than 10 percent in 2018. The company has about \$10 billion in annual sales, according to the Financial Times, and has about 30,000 employees, up about 2,000 from one year earlier. McKinsey accounted for 787,000 metric tons of carbon dioxide equivalent emissions in 2018, about 83 percent of which was generated by employee air travel. A portion of the remainder was generated by hotel accommodations. McKinsey on the whole had 780,000 metric tons of such emissions in 2017. While the company's consultants are among the most frequent of flyers, McKinsey nevertheless is exploring ways of reducing travel, including adding video-conferencing capabilities and other remote collaboration options.

## 7 **ACCENTURE** DUBLIN

**2018 U.S.-Booked Air Volume:** \$260 million  
**2018 Global Air Volume:** \$530 million  
**2018 U.S. T&E:** \$572 million

**2018 Global T&E:** \$1.3 billion  
**Primary Air Suppliers:** United, Delta, American  
**Primary Hotel Suppliers:** Marriott, Hilton, InterContinental  
**Primary Car Rental Supplier:** Avis  
**Primary Global Online Booking Tool:** GetThere  
**Primary U.S. Payment Supplier:** American Express  
**Card Program:** individual bill/individual pay  
**Primary Global Expense Supplier:** MyTE internal system  
**Primary Global Travel Risk Management Supplier:** WorldAware  
**Consolidated Global TMC:** CWT

Professional services firm Accenture's U.S.-booked air spend rose 7 percent in 2018 from 2017's \$243 million, but the company expects that figure to drop 6 percent to \$245 million this year. The company earned \$41.6 billion in revenue in 2018. Of the 2018 U.S.-booked tickets, 94 percent were booked via approved online tools, and 91 percent of those needed no agent assistance. Three-quarters of 2018 U.S.-booked air spend was for domestic travel. The company has a single global travel policy and in 2018 added new travel controls and completed a transition to a global delivery center for after-hours support. Accenture focused on improving the user experience for travelers and integrating travel booking and immigrations processes. This year, it's reviewing its global travel model, streamlining global travel policy and approvals and standardizing how contractor and nonemployee travel bookings are processed. It's also simplifying its policies this year.

## 8 **MICROSOFT** REDMOND, WASH.

**2018 U.S.-Booked Air Volume:** \$250 million  
**2018 Global Air Volume:** \$400 million  
**2018 U.S. T&E:** \$450 million  
**Primary U.S. Air Supplier:** Delta  
**Primary U.S. Hotel Suppliers:** Marriott, Hilton, Hyatt  
**Primary U.S. Online Booking Tool:** Concur  
**Primary U.S. Payment Supplier:** American Express  
**Card Program:** individual bill/central pay  
**Primary Global Expense Tool:** Microsoft Dynamics  
**Consolidated U.S. TMC:** Amex GBT

Microsoft's U.S.-booked air volume rose 12 percent in 2018 from 2017's \$224 million. In 2018, Microsoft Travel rebuilt the company's travel portal around a chatbot-driven, personalized experience based on Microsoft's years of work to develop a group of personas for travelers and thus personalize communications and offers to each traveler. Meanwhile, the company's Roadmap and Tripism users have increased to 20,000 each. Roadmap makes traveler friendly apps customized to each corporate travel program. Tripism, whose Microsoft users numbered only 10,000 users in October 2017, makes recommendations for travelers based on peers' experiences, as well as Microsoft office locations, preferred hotel suppliers and Dinova network restaurants. Almost half Microsoft's U.S.-booked travel in 2018 was domestic. Nearly all of the U.S.-booked tickets, 95 percent, went through approved online tools, and 90 percent of those required no agent assistance. Microsoft made no changes last year to its travel policy, which is global.

# Marriott International

Just months after introducing the Marriott Bonvoy™ brand name, Marriott International's travel program is getting a lot of buzz from corporate customers as well as accolades within the travel industry.

Marriott Bonvoy, which replaced Marriott Rewards®, The Ritz-Carlton Rewards® and Starwood Preferred Guest (SPG®) in February, stands for "good travel," enriching the lives of its members and connecting the world. Representing far more than a traditional loyalty program, Marriott Bonvoy offers its 133 million members an extraordinary portfolio of global brands and more than 7,000 hotels located in 132 countries and territories and an expansive list of experiences allowing members to pursue their passions while traveling. Marriott Bonvoy connects the world and enhances the lives of its members by offering unmatched benefits and rewards such as the ability to earn points faster through global promotions and co-brand credit cards from Chase and American Express.

## Benefits to Travel Managers and Business Travelers

Corporations love the fact that such a wide array of properties, brands and price points offers a wide variety of options for business trips. Business travel becomes more enjoyable for members with Elite status and member benefits, such as late checkout and room upgrades. And the Elite status benefits for travelers, such as lounge access and enhanced internet access, become cost-saving benefits for companies. Business travelers achieve more benefits at each Elite status level and can redeem points for fun—from free hotel nights to once in a lifetime Marriott Bonvoy Moments™ including culinary, entertainment, lifestyle and sports experiences.



Sheraton Grand Chicago



W Bellevue

## Mobile App Designed for Frequent Travelers

The Marriott Bonvoy App is the perfect travel companion. Created for Marriott Bonvoy members, the app makes booking a hotel and managing your account and reservations easier than ever. Check in 48 hours before you arrive; find out when your room is ready; request extra towels; chat directly with hotel associates; order room service and more. And your mobile device is also your room key at thousands of our properties worldwide enabling an even faster check in experience for those who wish to bypass the front desk entirely. We look forward to working with you on ways our app can complement your managed travel programs.

## Award Winning Loyalty

In April 2019, Marriott Bonvoy took home four total awards at the 29<sup>th</sup> annual Freddie Awards, the most prestigious member-generated awards in the travel loyalty industry. These included Hotel Program of the Year, Americas; Best Hotel Promotion, Americas; Best Elite Hotel Program, Europe and Africa; and Best Hotel Redemptions Ability, Americas. Over the past 23 years, Marriott's former loyalty programs, Marriott Rewards, The Ritz-Carlton Rewards and SPG won an astounding 215 Freddie Awards combined.

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INTERNATIONAL

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## 9 BOEING CHICAGO

**2018 U.S.-Booked Air Volume:** \$244 million

**2018 Global Air Volume:** \$285.5 million

**2018 Global T&E:** \$566.5 million

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

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

**Primary Global Online Booking Tool:** Concur

**Primary U.S. Payment Supplier:** Citi

**Card Program:** individual bill/central pay

**Primary Global Expense Supplier:** Concur

**Primary Global Travel Risk Management Supplier:** Anvil

Boeing adjusted its travel policy in 2018 to cover travel expenses related to nursing mothers, such as the cost of storing and shipping home breast milk for use at home. Also, under a new immigration section in the policy, employees can submit TSA Precheck, Real ID, passports and passport photos for reimbursement. However, expenses related to expedited check-in are not reimbursable. The company also now allows ridehailing services. Meanwhile, U.S. car renters no longer must refuel rental cars before returning them. Overall, Boeing aims to simplify its travel handbook this year.

The company implemented a hotel rate search tool to generate savings and usage data around its negotiated hotel program and added an artificial intelligence/machine learning-powered audit module to its expense system. This year, Boeing, an Airlines Reporting Corp.-accredited Corporate Travel Department, completed an RFP for global support services. It's expanding T&E management to its subsidiaries and is adding a traveler tax and immigration tool for international travel compliance, streamlining its audit and pretrip approval process and increasing use of self-service tools, apps, and AI/ML robotics for operations and traveler services. It also intends to implement a new back-office system and new reporting and data analytics tools.

Ninety-two percent of Boeing's U.S.-booked tickets went through approved online tools in 2018, 78 percent of those without agent help. The aircraft manufacturer reported \$101.1 billion in revenue in 2018 and has a single global travel policy. Boeing's U.S.-booked air volume rose 7 percent in 2018 from 2017's \$227.2 million. Seventy-eight percent of its U.S.-booked air travel was for domestic travel in 2018.

## 10 EXXONMOBIL IRVING, TEXAS

**2018 U.S.-Booked Air Volume:** \$240 million

**Primary Global Expense Supplier:** Chrome River

**Consolidated Global TMC:** CWT

Oil and gas giant ExxonMobil increased its U.S.-booked air volume in 2018, according to a BTN estimate. The company's revenue increased nearly 18 percent to \$279.3 billion. Selling, general and administrative expenses increased 8 percent to nearly \$11.5 billion. The company had 71,000 employees at the end of 2018, up from 69,600 at the end of 2017. ExxonMobil selected Chrome River as its global expense solution provider in August 2018 after a lengthy selection process. All employees throughout the world have access to the tool for expense reporting.

## 11 GOOGLE MOUNTAIN VIEW, CALIF.

**2018 U.S.-Booked Air Volume:** \$239 million

**Primary U.S. Payment Supplier:** Citi

Google's U.S.-booked air spend jumped 34 percent in 2018 from 2017's \$178 million. That's the fifth straight year of double-digit-percentage increases and nearly three times 2017's 12 percent rise. Google expects U.S.-booked air spend to grow 16 percent to \$277 million this year. Revenue, meanwhile, jumped 23 percent in 2018 to \$136.8 billion, the same rate of increase as the previous year.

The company made no change in 2018 to its travel policy, which covers the globe, and it plans none this year. It did roll out SAP Concur's TripLink last year to reveal corporate negotiated rates to travelers shopping on United and American's direct sites and to bring data for business trips back into Google's travel program.

Of the company's 2018 U.S.-booked air volume, 65 percent was for international travel. CWT was Google's primary travel management company, handling 45 percent of the tech giant's agency business in the U.S., as well as globally.

## 12 AMAZON SEATTLE

**2018 U.S.-Booked Air Volume:** \$220 million

**Primary U.S. Expense Reporting Tool:** Concur

**Consolidated U.S. TMC:** CWT

Online retail giant Amazon increased its U.S.-booked air volume in 2018, according to a BTN estimate. The company generated nearly \$232.9 billion in net sales, up more than 30 percent from 2017. Amazon employed 647,500 full- and part-time employees at year-end 2018, up from 566,000 one year prior. Amazon's travel policy forbids the use of premium class air travel, even for intercontinental flights.

## 13 LOCKHEED MARTIN BETHESDA, MD.

**2018 U.S.-Booked Air Volume:** \$200.5 million

**2018 Global Air Volume:** \$230.8 million

**2018 U.S. T&E:** \$391.7 million

**2018 Global T&E:** \$463.9 million

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

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

**Primary Car Rental Supplier:** Avis Budget Group

**Primary Global Online Booking Tool:** Concur

**Primary U.S. Payment Supplier:** US Bank Visa

**Card Program:** individual bill/individual pay

**Primary U.S. Expense Supplier:** Concur

**Consolidated Global TMC:** BCD

Of Lockheed Martin's 2018 global air volume, 87 percent was booked in the U.S., but of that, 52 percent was for travel abroad. Of the 2018 U.S.-booked air volume, 86 percent of tickets went through approved online tools, and 98 percent of those required no agent assistance. The international aerospace company's single global travel policy requires

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travelers who book out of policy to document why, and the company set a standard threshold for eligibility to fly in business class. The company also implemented a global immigration and tax solution. The company's revenue rose \$2.7 billion to \$53.8 billion in 2018, while U.S.-booked air spend dropped \$3.2 million from 2017's \$203.6 million. The company expects U.S.-booked air volume to jump \$30.1 million this year.

## 14 GE BOSTON

**2018 U.S.-Booked Air Volume:** \$195 million  
**Primary U.S. Payment Supplier:** American Express  
**Primary U.S. Expense Supplier:** Concur  
**Consolidated Global TMC:** CWT

GE's U.S.-booked air travel declined about 3 percent in 2018, according to a BTN estimate. In recent years, GE has introduced an internal travel app that alerts managers when employees book travel, among other functions. GE's 2018 revenue increased about 3 percent to more than \$121.6 billion. The company's net loss was \$22.8 billion. GE last year finalized the sale of its Industrial Solutions business to ABB for about \$2.6 billion. The company at year-end 2018 had about 283,000 employees, down about 30,000 from 12 months prior. For the first time, GE last year released greenhouse gas emissions related to its business travel. Emissions totaled more than 556,000 metric tons of carbon dioxide equivalent.

## 14 THE WORLD BANK WASHINGTON D.C.

**2018 U.S.-Booked Air Volume:** \$195 million  
**2018 Global Air Volume:** \$282 million  
**2018 Global T&E:** \$475 million  
**Primary Air Suppliers:** United JV, Delta JV, Qatar Airways  
**Primary Hotel Suppliers:** Marriott, InterContinental, Hilton  
**Primary U.S. Online Booking Tool:** E-Travel Management  
**Primary Non-U.S. Online Booking Tool Outside U.S.:** GetThere  
**Primary U.S. Payment Supplier:** Diners Club Mastercard  
**Card Program:** central bill/central pay  
**Primary U.S. Expense Supplier:** customized SAP system  
**Primary Global Travel Risk Management Supplier:** WorldAware  
**Consolidated U.S. TMC:** Amex GBT

The World Bank, which provides loans and grants worldwide to prevent poverty, generated \$480 million in revenue in 2018 and spent a significant portion on air travel. Of its 2018 U.S.-booked air travel, 93 percent was to destinations outside the U.S. The financial institution is in the midst of overhauling its managed travel program, which operates under a single global travel policy. In 2018, it recontracted with American Express Global Business Travel in the U.S., introduced the travel management company's mobile app there and launched a pilot for the Neo online booking tool. The World Bank also completed the second phase of a global TMC RFP while adding 10 countries to its consolidated TMC program. HRS-supported global hotel contract negotiations achieved \$3 million in savings and \$4 million in cost avoidance for 2019.

The organization is adding another 60 countries to its global TMC program in 2019 and adding Neo in the U.S., France, Germany and Switzerland. More countries will follow. It also plans to roll out the GBT app

to all markets served by that TMC. In 2018, GBT served 31 percent of the organization's non-U.S. business. BCD handled 24 percent. HRG handled 22 percent, though GBT has acquired HRG. SOTC in India handled 5 percent. The remaining 18 percent of travel was to nonconsolidated markets. The World Bank also will begin to require pretrip approval via SAP, will review its end-to-end process and will issue Citi corporate cards to staff traveling in multiple countries.

The World Bank's spend inched up \$10 million in 2018 from 2017's \$185 million, and it expects the figure to rise by half as much this year. Just 2 percent of 2018 U.S.-booked air tickets went through approved online tools, and all required agent assistance.

## 16 KPMG LLP NEW YORK

**2018 U.S.-Booked Air Volume:** \$187 million  
**2018 U.S. T&E:** \$584 million  
**Primary U.S. Online Booking Tool:** Concur  
**Card Program:** individual bill/central pay  
**Primary U.S. Expense Supplier:** Concur  
**Primary U.S. Travel Risk Management Supplier:** International SOS  
**Consolidated U.S. TMC:** Amex GBT

KPMG LLP's U.S.-booked air volume rose 15.4 percent from 2017's \$162 million while U.S. T&E increased 7.9 percent from \$541 million and revenue rose 5.5 percent from \$9 billion. The tax and advisory network expects 2019 U.S.-booked spend to rise 7 percent. In the 2018 fiscal year, which ended Sept. 30, 2018, the company switched from GetThere to SAP Concur for booking and will continue to modify it to meet the needs of the business. It ramped up reporting on traveler behavior to inform a travel policy refresh, and it will continue those efforts this year. KPMG sets policy by country. Of its 2018 U.S.-booked air spend, 76 percent was for domestic travel. Of 2018 U.S.-booked air tickets, 80 percent went through approved online tools, up from 77 percent the year prior. In both years, 80 percent of those tickets required no agent assistance.

## 17 BANK OF AMERICA CHARLOTTE

**2018 U.S.-Booked Air Volume:** \$183 million  
**Primary Air Supplier:** British Airways  
**Consolidated U.S. TMC:** Amex GBT

Financial giant Bank of America spent about 5 percent more on U.S.-booked flights in 2018 than it did in 2017, according to a BTN estimate. Bank of America revenue increased 4.2 percent to more than \$91.2 billion in 2018. Noninterest expenses decreased to \$53.4 billion, about \$1.4 billion lower than in 2017. Bank of America employed 204,000 people at the end of 2018, about 5,000 fewer than it did one year earlier.

## 18 FACEBOOK MENLO PARK, CALIF.

**2018 U.S.-Booked Air Volume:** \$175 million  
**Primary U.S. Online Booking Tool:** Concur

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**Primary U.S. Expense Supplier:** Concur  
**Consolidated U.S. TMC:** CWT

Social media giant Facebook continued its rapid growth in 2018, and that's reflected in its travel volume. BTN estimates Facebook's U.S.-booked air volume increased by a double-digit percentage in 2018. Facebook—which owns Instagram, WhatsApp and other tech platforms—saw revenue increase more than 37 percent to \$55.8 billion. The company at the end of 2018 employed nearly 35,600 people, up from 25,100 one year prior. Facebook's 2018 business travel generated 397,000 metric tons of carbon dioxide equivalent emissions, up from 246,000 in 2017. The company allows business class air travel on most international flights.

**19 JPMORGAN CHASE & CO.**  
**NEW YORK**

**2018 U.S.-Booked Air Volume:** \$164 million  
**Consolidated Global TMC:** CWT

According to a BTN estimate, banking and financial giant JPMorgan Chase & Co. decreased its U.S.-booked air volume in 2018 by 4 percent. Net revenue increased 8 percent to more than \$109 billion. Noninterest, noncompensation expense increased almost 7 percent to nearly \$30.3 billion. The company had about 129,500 employees at the end of 2018, down from 133,700 in 2017. JPMorgan Chase's 2018 business travel generated nearly 176,400 metric tons of carbon dioxide equivalent emissions, down from about 187,000 in 2017. The company purchases verified carbon units certified under the Verified Carbon Standard to offset all those emissions, as well as those from its corporate jets.

**20 BCG**  
**BOSTON**

**2018 U.S.-Booked Air Volume:** \$150 million  
**Consolidated U.S. TMC:** Amex GBT

Privately held management consulting firm BCG's U.S.-booked air spend in 2018 increased about 3 percent in 2018, according to a BTN estimate. BCG reported that sales increased 19 percent to \$7.5 billion. At the end of 2018, the firm had 18,500 employees, up from 16,000 in 2017, and BCG claims offices in more than 90 cities in 50 countries.

**21 ORACLE**  
**REDWOOD SHORES, CALIF.**

**2018 U.S.-Booked Air Volume:** \$145 million  
**Primary Global Expense Supplier:** Oracle Internet Expenses  
**Consolidated Global TMC:** CWT

Tech giant Oracle increased U.S.-booked air spend 6 percent in 2018, though spending remains far below what it was before significant cuts in 2016 and 2017. The company asks employees to travel only when necessary and pushes its own remote conferencing tech companywide to limit travel costs. Oracle in recent years has implemented dynamic pricing hotel agreements for certain brands and has reviewed policy on premium economy airfares and other airline fare offerings. Revenue for the 12 months ending May 31, 2019, increased less than 1 percent year over year

to \$39.5 billion. Oracle had approximately 136,000 full-time employees on that date, down about 1,000 from a year earlier.

**22 CITI**  
**NEW YORK**

**2018 U.S.-Booked Air Volume:** \$140 million  
**Consolidated U.S. TMC:** CWT

Banking and financial giant Citi's 2018 U.S.-booked air volume increased in 2018, according to a BTN estimate. The company's 2018 net revenue increased less than 1 percent to \$72.9 billion. Citi at the end of 2018 had about 204,000 employees, about 5,000 fewer than one year prior. Citi's 2018 air travel generated 149,600 metric tons of carbon dioxide equivalent emissions, 1 percent lower than in 2017. Its 2018 business travel by rail generated 227 such metric tons, up from 209 in 2017. The company encourages employees to use remote conferencing technologies in lieu of travel whenever possible. If travel must occur, Citi encourages employees to group trips together to manage costs and reduce trips and to consider train travel when feasible.

**22 JOHNSON & JOHNSON**  
**NEW BRUNSWICK, N.J.**

**2018 U.S.-Booked Air Volume:** \$140 million  
**Primary Global Online Booking Tool:** Concur  
**Primary Global Expense Supplier:** Concur  
**Primary Global Travel Risk Management Supplier:** International SOS  
**Consolidated Global TMC:** Amex GBT

BTN estimates that U.S.-booked travel spend at pharmaceutical and consumer product conglomerate Johnson & Johnson increased about 2 percent in 2018 to \$140 million. J&J's 2018 revenue increased nearly 7 percent to \$81.6 billion, and its selling, marketing and administrative expenses increased nearly 5 percent to \$22.5 billion. The company employed 135,100 people at the end of 2018, up from 134,000 one year prior. J&J's business travel generated more than 775,700 metric tons of carbon dioxide equivalent emissions in 2018, up 12 percent year over year. J&J in recent years has rolled out SAP Concur's self-booking and expense management tools throughout the world.

**24 ROGHE**  
**BASEL, SWITZERLAND**

**2018 U.S.-Booked Air Volume:** \$138.3 million  
**Consolidated U.S. TMC:** BCD

Pharmaceutical, medical and healthcare company Roche dropped its U.S.-booked air spend 8.4 percent in 2018. The company expects that figure to inch back up by \$4 million this year to \$142 million, which is still lower than 2017's \$151 million. In 2018, the company focused on global alignment within its travel program and began implementation of a single online booking tool globally. The company updated its travel policy to allow ridehailing, to restrict use of sharing economy accommodations and to reiterate that the company requires itemized receipts for meals. Roche will continue rolling out tech in 2019, focusing on traveler engagement and the employee experience.



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## 25 UNITED TECHNOLOGIES FARMINGTON, CONN.

**2018 U.S.-Booked Air Volume:** \$137 million  
**Primary Car Rental Supplier:** Avis

United Technologies' diverse business portfolio—the contractor and conglomerate manufactures aircraft engines, elevators, escalators and other products for both the consumer and military markets—generated \$66.5 billion in revenue in 2018, up 11 percent from 2017. Meanwhile, its U.S.-booked air volume increased 10 percent from 2017's \$124 million. The company expects the figure to rise 9 percent this year. Its primary U.S. travel management companies are American Express Global Business Travel and BCD Travel.

Major changes are underway at UTC, the parent company of Pratt & Whitney aircraft engines and Otis elevators, among others. In November 2018, it closed a \$30 billion deal to acquire aerospace tech firm Rockwell Collins and subsequently announced plans to split into three companies. UTC in June 2019 announced plans to merge with fellow CT 100 defense contractor Raytheon in a deal worth more than \$100 billion. The separation of the Otis elevator and the Carrier HVAC and refrigeration units into stand-alone businesses is expected to take place in 2020, before any merger of UTC and Raytheon. UTC set a corporate goal in 2015 to reduce its greenhouse gases emitted as a result of business travel 15 percent by 2020. The company tallied about 103,500 metric tons of carbon dioxide equivalent due to business air travel and car rentals in 2017, the most recent figure available. That's about 6 percent lower than its 2015 figure, putting it on track to meet the goal. Net sales increased about 11 percent in 2018 to \$66.5 billion. The company had 240,200 employees at year-end, up from 204,700 a year earlier, reflecting the addition of 30,000 Rockwell Collins employees.

## 26 FEDEX MEMPHIS

**2018 U.S.-Booked Air Volume:** \$130 million  
**Consolidated U.S. TMC:** BCD

FedEx slightly decreased its U.S.-booked air volume in 2018, according to a BTN estimate. In its 2018 fiscal year, which ended May 31, 2018, the delivery giant generated 63,900 metric tons of carbon dioxide equivalent via air travel, separate from its own fleet of aircraft. That's more than a 10 percent decrease from the prior fiscal year. The company has introduced virtual and augmented reality educational opportunities, helping to reduce internal travel. FedEx earned \$69.7 billion in revenue in its 2019 fiscal year, up from \$65.5 billion in the preceding fiscal year. It had more than 450,000 employees at the end of May, up from 425,000 one year earlier. In 2018, it expanded its residential delivery service to six days per week due to the growth of e-commerce, and it plans to introduce seven-day-a-week service in 2020.

## 27 SIEMENS MUNICH

**2018 U.S.-Booked Air Volume:** \$127 million  
**2018 U.S. T&E:** \$300 million  
**Primary U.S. Payment Supplier:** American Express  
**Primary U.S. Travel Risk Management Supplier:** International SOS  
**Consolidated U.S. TMC:** BCD

Siemens reduced its spending on U.S.-point-of-sale airline tickets by more than 13 percent last year as part of a concerted global effort to reduce T&E expenditures on internal meetings. In the U.S., that effort decreased T&E spend by 18 percent, primarily through videoconferencing and other virtual collaboration tools.

Siemens in March and April of last year also began going live in the U.S. with SAP Concur Travel & Expense, moving about 75 percent of its booking and expense volume to the off-the-shelf, end-to-end solution. The company, which previously used Deem, moved businesses that use the SAP enterprise resource planning tool first and will transition the rest of its U.S. businesses this fall. It will move booking and expense transactions in Mexico to SAP Concur next year. Fully aligning its use of SAP and SAP Concur will standardize expense types and trip purpose globally to gain greater data strength.

Last year, Siemens also moved the management of its global hotel program to HRS. It is now engaging HRS to negotiate with chains and brands and looking for HRS to provide continuous sourcing in Siemens' primary markets. This year, the company is focusing on payment solutions, including for nonemployees. The company will implement a solution for job candidates this year. Siemens also is conducting a global bid for travel management company services and a fleet leasing management bid for North America.

The company has a global travel policy framework that each country adjusts to reflect local law, regulation and labor agreement requirements. The framework, instituted in 2016 and less stringent than previous policy, communicates best practices but puts decision-making power in the hands of travelers and their managers.

## 28 ROYAL DUTCH SHELL THE HAGUE, NETHERLANDS

**2018 U.S.-Booked Air Volume:** \$120 million  
**Primary Global Expense Supplier:** Concur  
**Consolidated Global TMC:** CWT

BTN estimates that U.S.-booked air spending at oil and gas giant Royal Dutch Shell rose \$20 million in 2018. Revenue increased more than 27 percent to \$388.4 billion, and its income increased from \$13.4 billion in 2017 to \$23.9 billion in 2018. Shell's 2018 business air travel emissions totaled 200,000 metric tons of carbon dioxide equivalent, down from 210,000 the year before. The company employed 81,000 people at year-end 2018, down from 83,000 in 2017.

## 28 WELLS FARGO SAN FRANCISCO

**2018 U.S.-Booked Air Volume:** \$120 million  
**2018 Global T&E:** \$618 million  
**Consolidated U.S. TMC:** Amex GBT

Banking and financial giant Wells Fargo cut its global T&E expenditure \$69 million in 2018 from 2017's \$687 million. BTN estimates Wells Fargo's spending on U.S.-booked air travel dropped, as well, by 8 percent.

Among the moves that the company has made to cut travel spending is a requirement for travelers to obtain pretrip approval for certain types of high-cost or international travel and for air carriers and hotels outside Wells Fargo's roster of preferred suppliers. Employees also must consider remote conferencing as an alternative to travel for internal meetings

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and are required to book travel through the company's preferred channels. Wells Fargo in recent years has begun treating meetings company-wide as a business process management initiative, gaining more control of the budget-approval process and capturing savings data.

The carbon dioxide equivalent emissions generated by Wells Fargo's business air travel dropped more than 3 percent in 2018 to about 93,800 metric tons. Wells Fargo's preferred global travel management company was HRG, which American Express Global Business Travel acquired last year. The company's revenue dropped 2 percent in 2018 to \$86.4 billion. Wells Fargo employed 258,700 people at the end of last year, down 2 percent from 2017.

## 30 COMCAST PHILADELPHIA

**2018 U.S.-Booked Air Volume:** \$118 million

**Primary Air Suppliers:** American, Delta, British Airways, JetBlue, Alaska, Virgin Atlantic

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

**Primary Car Rental Supplier:** Hertz

**Primary U.S. Online Booking Tool:** Concur

**Primary U.S. Payment Supplier:** Citi

**Primary U.S. Expense Supplier:** Concur

**Consolidated Global TMC:** BCD

U.S.-booked air volume at media and entertainment conglomerate Comcast, parent company of NBCUniversal and other properties, decreased slightly in 2018, according to a BTN estimate. Comcast acquired European media firm Sky for 30.2 billion British pounds in October 2018 after winning a bidding war against 21st Century Fox. Comcast revenue increased more than 11 percent in 2018 to \$94.5 billion, a figure that includes Sky revenue after the October acquisition. Comcast at the end of 2018 had 184,000 full- and part-time employees. In 2019, Comcast will consider if and how Sky could be integrated into its travel operations. For now, some Comcast divisions mandate air and hotel booking through agency or online booking channels. Comcast's NBCUniversal subsidiary expects its air travelers to take the lowest priced logical nonstop flight offered, whenever possible, on a preferred carrier, and requires travelers to stay in specific designated hotels when in major cities. For air travel, coach class is required for domestic U.S. travel, but some travelers on international flights longer than six hours are eligible to upgrade one class of service: to premium economy if available, otherwise to business class.

## 31 RAYTHEON WALTHAM, MASS.

**2018 U.S.-Booked Air Volume:** \$117 million

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

BTN estimates U.S.-booked air volume at defense contractor Raytheon held steady from 2017 to 2018 at \$117 million. Revenue increased nearly 7 percent to \$27.1 billion, and Raytheon employed about 67,000 people at the end of 2018, up about 3,000. Raytheon announced plans in June 2019 to merge with fellow CT 100 defense contractor and aerospace firm United Technologies. The companies expect the all-stock merger, which would create Raytheon Technologies, to close in the first half of 2020, pending shareholder and governmental approval. In the meantime, Raytheon is progressing toward a goal to deploy next-generation

virtual collaboration tools in 100 percent of its locations by 2020, a goal set in part to reduce the environmental impact of its business travel.

## 32 TPG SAN FRANCISCO

**2018 U.S.-Booked Air Volume:** \$114.5 million

**Primary Air Suppliers:** American, Delta, British Airways

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

**Primary Car Rental Supplier:** Hertz

**Primary Global Online Booking Tool:** Concur

**Primary Global Expense Supplier:** Concur

TPG's cross-portfolio travel program applies to firm employees and is also available to companies in its investment portfolio. Companies are invited to participate in the program as part of the firm's onboarding process and can work with the TPG team to customize the policy according to their travel needs. The program includes access to a global travel agency, reporting and data consolidation and preferred partnership with air, hotel and car rental providers, among other benefits. The program's U.S.-booked air spend grew 25 percent in 2018 from 2017's \$91.3 million, according to a BTN estimate. CWT is the primary global travel management company. Of the travel program's 2018 U.S.-booked air volume, 63 percent was for domestic travel. Two-thirds of the 2018 U.S.-booked tickets went through approved online tools, 80 percent of those without agent help.

## 33 THE WALT DISNEY CO. BURBANK, CALIF.

**2018 U.S.-Booked Air Volume:** \$114 million

**Primary Global Online Booking Tool:** Concur

**Primary U.S. Payment Supplier:** Citi Visa

**Primary Global Expense Supplier:** Concur

**Consolidated U.S. TMC:** Amex GBT

In 2018, The Walt Disney Co. employed technology to enhance its reporting, credit card reconciliation and day-to-day operations, and it plans to put technology to work again to further enhance internal reporting, to increase the online booking tool adoption and to deploy a virtual payment program. The company's U.S.-booked air spend dropped 1.7 percent from 2017's \$116 million, and the company expects that figure to remain at \$114 million in 2019. It has a single global travel policy. The company reported 2018 revenue of \$59.4 billion.

## 34 MERCK KENILWORTH, N.J.

**2018 U.S.-Booked Air Volume:** \$112.5 million

**2018 Global Air Volume:** \$247 million

**2018 U.S. T&E:** \$267 million

**2018 Global T&E:** \$565 million

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

**Primary Hotel Suppliers:** Hilton, InterContinental

**Primary Car Rental Supplier:** Hertz



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**Card Program:** individual bill/central pay  
**Primary Global Expense Supplier:** SAP  
**Primary Global Travel Risk Management Supplier:** International SOS  
**Consolidated U.S. TMC:** Amex GBT

Merck spent 2018 optimizing its air program, conducting a car rental RFP, developing a travel management company strategy, expanding its use of Tripbam and checking out travel app technology. This year, it's been deploying a new car rental supplier, app-based tech and a business intelligence tool; working on TMC contracts; developing a global mobility strategy with fleet management; and enhancing traveler engagement. In 2018, Merck added a section on ridehailing to its travel policy and enhanced policy for medical and scientific leaders. This year, the company is working on a full policy review and refresh. Merck has established a single global travel policy. American Express Global Business Travel handles all domestic U.S. business and 66 percent of non-U.S. air volume. BCD Travel handles the rest. Almost three-quarters of Merck's U.S.-booked air volume was on international flights in 2018. Eighty percent of the tickets went through approved online tools. The pharmaceutical giant turned in \$42.3 billion in revenue in 2018, and U.S.-booked air volume rose 13 percent from 2017's \$996 million. The company expects the figure to drop back to \$100 million this year.

## 35 CISCO SAN JOSE, CALIF.

**2018 U.S.-Booked Air Volume:** \$110 million  
**Primary Global Expense Supplier:** Concur  
**Primary Global Online Booking Supplier:** Concur

BTM estimates that tech conglomerate Cisco spent about \$110 million on U.S.-booked air travel. Cisco has implemented SAP Concur solutions for online travel booking and expense management in more than 70 countries. Its primary U.S. TMC is American Express Global Business Travel. The company requires all company meetings to be registered in its online events portal and outsources some meeting planning and event production to outside firms, including BCD Meetings & Events. Cisco supplies a suite of videoconferencing and remote collaboration tools, including TelePresence and Webex, and has used these tools throughout the world to try to reduce travel. Webex is available to all Cisco employees using company-assigned laptops, and Cisco has built more than 1,500 TelePresence rooms globally. About one-third of Cisco's annual global ISO 14001 environmental site audits are performed using the company's remote collaboration solutions. Revenue for Cisco's 2019 fiscal year, which ended July 27, 2019, increased about 3 percent over year to \$51.9 billion. The company had about 75,900 employees in July 2019, versus the 74,200 reported one year earlier.

## 35 DELL TECHNOLOGIES ROUND ROCK, TEXAS

**2018 U.S.-Booked Air Volume:** \$110 million  
**2018: Global Air Volume:** \$214 million  
**2018 U.S. T&E:** \$397.7 million  
**2018: Global T&E:** \$672 million  
**Primary U.S. Air Suppliers:** American, United, Delta

**Primary U.S. Hotel Suppliers:** Marriott, Hilton, Hyatt  
**Primary U.S. Car Rental Suppliers:** National, Enterprise  
**Primary Global Online Booking Tool:** Concur  
**Primary U.S. Payment Supplier:** American Express  
**Card Program:** individual bill/central pay  
**Primary Global Expense Supplier:** Concur  
**Primary U.S. Travel Risk Management Supplier:** International SOS  
**Consolidated Global TMC:** Amex GBT

Dell and EMC Corp. merged in 2016 to become DellEMC. The company is now known as Dell Technologies, and the travel programs consolidated in 2018, including the full implementation of American Express Global Business Travel and the SAP Concur booking tool. U.S.-booked air tickets made through approved online tools rose from 90 percent in 2017 to 91 percent in 2018, 93 percent of those getting done without agent assistance. Dell Technologies consolidated its U.S. global distribution system to Sabre last year, as well. EMC had been on Apollo.

Globally, the online adoption rate rose from 85 percent to 87 percent. The company also brought Japan, Chile, Colombia and Peru onto Concur's online booking tool and expanded Tripbam and Yapta to additional markets. This year, the company plans to bring India, the United Arab Emirates, Israel and New Zealand into the booking tool and bring Sri Lanka and Bangladesh into the travel program in general. The company has a single global travel policy, and 58 percent of its 2018 U.S.-booked air spend was domestic travel. Also in 2018, Dell Technologies plans to implement Tripism, which presents booking options based on a client's preferred suppliers, specialized supplier offers and peer reviews. It also will implement meetings sourcing platform Groupize, as well as Clear, which helps travelers navigate on-site security checkpoints, and Passport Plus, which expedites U.S. passports and other travel documents. And it plans to switch to dynamic hotel pricing.

The company also intends to automate rebookings via the Tripbam and Yapta reshopping tools: Tripbam will reshop the rates on completed bookings not just at the same hotel but across a cluster of similar properties, and it will rebook automatically when it finds a cheaper rate for a like-for-like room and property. Dell Technologies will configure Yapta to rebook airfares automatically when the rate drops within the original booking's no-penalty-cancellation window. Dell Technologies' U.S.-booked air spend dropped \$6 million from 2017's \$116 million, and the company expects it to stay at \$110 million this year. Its global air volume dropped from \$225 million to \$214 million. The company's U.S. T&E dropped 29 percent while its global T&E dropped 4 percent. The company's 2018 revenue was \$78.7 billion.

## 35 MEDTRONIC DUBLIN

**2018 U.S.-Booked Air Volume:** \$110 million  
**Consolidated Global TMC:** Amex GBT

BTM estimates that medical device firm Medtronic's U.S.-booked air volume increased \$10 million in 2018. The company's net sales for its 2019 fiscal year, which ended April 26, 2019, increased about 2 percent year over year to nearly \$30.6 billion. Medtronic had about 90,000 employees on that date, up from about 86,000 at the end of its 2018 fiscal year, which ended April 27, 2018. In fiscal year 2018, Medtronic generated 210,800 metric tons of carbon dioxide equivalent emissions as a result of its air travel, up about 8 percent year over year. In 2018, the company considered policies that would reimburse travelers for checked baggage, and it approved ridehailing services but not the use of alternative lodging suppliers like Airbnb and Vrbo.

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## 38 NORTHROP GRUMMAN

FALLS CHURCH, VA.

**2018 U.S.-Booked Air Volume:** \$105 million  
**Primary U.S. Online Booking Tool:** Concur  
**Primary U.S. Expense Supplier:** Concur  
**Consolidated U.S. TMC:** BCD

Defense contractor and aerospace firm Northrop Grumman's U.S.-booked air travel increased slightly in 2018. Sales increased nearly 16 percent to \$30.1 billion, and its backlog, a measure of firm orders not yet fulfilled, increased more than 25 percent to \$53.5 billion. Northrop Grumman business travel—including air, rail, hotel and car rental—accounted for nearly 140,300 metric tons of carbon dioxide equivalent emissions in 2018, down about 2 percent year over year. The company had about 85,000 employees at the end of 2018, about 15,000 more than it did in 2017. Northrop Grumman added about 12,500 employees last year via the \$9.2 billion acquisition of missile manufacturer Orbital ATK.

## 38 SAP

WALLDORF, GERMANY

**2018 U.S.-Booked Air Volume:** \$105 million  
**Consolidated U.S. TMC:** BCD

Enterprise software giant SAP, which owns online booking and expense reporting technology provider Concur, for the past few years internally has charged a fee on booked flights to invest in carbon credits to offset the carbon emissions generated by business travel. The company offset 170,000 metric tons of carbon dioxide equivalent in 2018, compared with 135,000 in 2017. SAP also has invested in remote conferencing technologies as a travel alternative. The company's revenue increased more than 5 percent in 2018 to 24.7 billion euros. SAP had 96,500 employees at the end of 2018, up from 88,400 one year earlier. In January 2019, SAP announced a restructuring that could cost as much as 950 million euros and included the loss of 4,400 jobs, but the company still expects to surpass 100,000 employees in 2019.

## 40 ABBOTT

ABBOTT PARK, ILL.

**2018 U.S.-Booked Air Volume:** \$103 million  
**Primary U.S. Online Booking Tool:** Concur  
**Primary U.S. Payment Supplier:** Bank of America  
**Primary U.S. Expense Supplier:** Concur  
**Consolidated U.S. TMC:** CWT

U.S.-booked air spend at pharmaceutical and medical device firm Abbott increased slightly in 2018 from 2017, according to a BTN estimate. Abbott generated about 254,000 metric tons of carbon dioxide equivalent emissions in 2018 due to its business travel, nearly 47 percent more than it had one year earlier. For employees who travel for business at least twice per year or spend at least \$1,000 on business travel per year, Abbott makes available a Bank of America corporate business card. Abbott's sales increased nearly 12 percent in 2018 to \$30.6 billion. Abbott employed about 103,000 people as of Dec. 31, 2018, about 4,000 more than it had one year prior.

## 41 UNITEDHEALTH GROUP

MINNETONKA, MINN.

**2018 U.S.-Booked Air Volume:** \$99 million  
**Consolidated Global TMC:** BCD

Healthcare services company UnitedHealth's 2018 U.S.-booked air volume rose 29 percent from 2017's \$77 million as revenue grew 12 percent to \$226 billion. The company has a single global travel policy. Of its 2018 U.S.-booked air volume, only 4 percent crossed country lines.

## 42 NOVARTIS

BASEL, SWITZERLAND

**2018 U.S.-Booked Air Volume:** \$95 million  
**2018 Global Air Volume:** \$290 million  
**Primary U.S. Air Suppliers:** United, American, Delta  
**Primary U.S. Hotel Suppliers:** Marriott, Hilton  
**Primary U.S. Car Rental Suppliers:** Hertz, National  
**Primary U.S. Online Booking Tool:** GetThere  
**Primary Non-U.S. Online Booking Tools:** GetThere, Cytric  
**Primary U.S. Payment Supplier:** Citi  
**Card Program:** individual bill/central pay  
**Primary U.S. Expense Supplier:** Concur  
**Consolidated Global TMC:** CWT

Forty-five percent of Novartis' 2018 U.S.-booked air volume was for domestic travel. Seventy-six percent of U.S.-booked airline tickets were made through an approved online booking tool. In 2019, the firm is focusing on making the end-to-end travel booking and expense process intuitive and streamlining and simplifying it.

## 43 THE CHURCH OF JESUS CHRIST OF LATTER-DAY SAINTS

SALT LAKE CITY

**2018 U.S.-Booked Air Volume:** \$93 million  
**Primary U.S. Air Suppliers:** Delta, American, United  
**Primary U.S. Hotel Suppliers:** Marriott, Choice, InterContinental  
**Primary U.S. Car Rental Suppliers:** Enterprise/National, Hertz  
**Primary U.S. Online Booking Tool:** E-Travel Management  
**Primary U.S. Payment Supplier:** Bank of America

BTN named Shawn Johnson, who then was support services director for The Church of Jesus Christ of Latter-Day Saints, as one of its 2018 Best Practitioners for developing the quality cost per mile key performance indicator. At the time, he said he wanted to use the metric, which launched in 2017, in RFPs and to expand to other supplier categories. And so, last year, his program executed several regional airline RFPs that improved service and quality cost per mile, and it got the ball rolling in hotel and car rental by developing initial quality measures for those categories. The idea is to quantify traveler friction elements—for air, that meant factors like on-time rankings, baggage handling performance, response to travelers' needs, frequent-flyer programs, sales team and reporting—to factor alongside price considerations when measuring the value of the church's supplier partnerships.

The church has a single global travel policy and for several years has had an Amadeus tool in place that automatically books the church's



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missionaries, which number 65,000, based on preferred airlines and travel schedules. The system is essentially touchless with some quality assurance from agents. The agents thus can use the gained time to focus more on the missionaries' visa needs. The church implemented a duty of care program in 2018, called TravelSafe that is more established and more visible within the company than the church's previous duty of care program. The church's U.S.-booked air volume stayed flat from 2017 to 2018, and it estimates that figure to stay the same in 2019, as well.

## 44 SANOFI PARIS

**2018 U.S.-Booked Air Volume:** \$91 million  
**Primary Global Online Booking Tool:** Concur  
**Primary Global Expense Supplier:** Concur  
**Consolidated Global TMC:** Amex GBT

Pharmaceutical giant Sanofi's spend on U.S.-booked air travel decreased \$13 million in 2018, according to a BTN estimate. The company's net sales declined to 34.5 billion euros in 2018, down nearly 2 percent. Sanofi for years has pushed to limit the environmental impact of its business travel, but in 2018, the company generated about 136,500 metric tons of carbon dioxide equivalent as a result of such travel, 22 percent higher than in 2017. Those figures incorporate Sanofi air travel originating in 36 countries, which represents 80 to 90 percent of all company air travel; hotel stays in 26 countries; and car rentals in 16 countries. The company's travel policy encourages remote collaboration and discourages some aspects of business travel, depending on trip duration, and its SAP Concur online booking tool includes traveler prompts to that effect. Sanofi has installed high-definition video-conferencing at several sites as an alternative to travel. At the end of 2018, the company had 104,200 employees, down 2,300 from one year earlier.

## 45 GOLDMAN SACHS NEW YORK

**2018 U.S.-Booked Air Volume:** \$90 million  
**Primary Air Suppliers:** American, British Airways, Cathay Pacific, Delta  
**Primary Hotel Suppliers:** Hilton, Hyatt, Marriott  
**Primary Car Rental Suppliers:** Avis, Hertz, National  
**Primary Online Booking Tool:** GetThere  
**Primary U.S. Payment Supplier:** American Express  
**Primary Expense Supplier:** proprietary tool  
**Consolidated Global TMC:** Amex GBT

Goldman Sachs increased spending on airline tickets at the U.S. point of sale by about \$10 million in 2018. That increase owed particularly to client-related travel, as the company aims for \$5 billion in incremental revenue by 2020. Goldman Sachs offset the increase by controlling nonclient-related travel. It expects U.S.-booked air volume to stay flat in the upcoming year and is continuing to institute several mechanisms for managing internal travel, including centralized pretrip approval, reporting and budget tracking tools. The company established a new spend management framework for third-party operating expense by implementing an SAP suite of tools, centered around SAP Concur for the online booking tool and reporting. Concur's mobile app will be Goldman Sachs' first approved mobile app for travel, and the firm has decided to leverage the carbon footprint tool in its carbon offset program, which will launch globally in late 2019 into 2020.

## 45 MORGAN STANLEY NEW YORK

**2018 U.S.-Booked Air Volume:** \$90 million  
**Consolidated Global TMC:** Amex GBT

BTN estimates Morgan Stanley's 2018 U.S.-booked air spend spiked by more than 40 percent over 2017 air spend. Full-year net revenue for the investment bank and financial services firm were a record \$40.1 billion, compared with \$37.9 billion the prior year. Morgan Stanley has been in buying mode since late last year and in early 2019 made its biggest acquisition since the 2008 financial crisis: employee stock plan management company Solium Capital for \$900 million. The deal expanded Morgan Stanley's wealth management portfolio to reach a broader small and midsize corporate client base; previously, it concentrated on a smaller cluster of Fortune 500 clients. According to Forbes, Morgan Stanley employs 60,348, up from an estimated 57,600 in 2017.

## 45 NIKE BEAVERTON, ORE.

**2018 U.S.-Booked Air Volume:** \$90 million  
**2018 Global Air Volume:** \$135 million  
**2018 U.S. T&E:** \$165 million  
**2018 Global T&E:** \$259 million  
**Primary Air Suppliers:** Delta, Alaska, United  
**Primary Hotel Suppliers:** Hyatt, Marriott, Kimpton  
**Primary Car Rental Suppliers:** Hertz, Avis  
**Primary Global Online Booking Tool:** Concur  
**Primary U.S. Payment Supplier:** Citi Mastercard  
**Card Program:** central bill/central pay  
**Primary U.S. Expense Supplier:** Concur  
**Primary Global Travel Risk Management Supplier:** Anvil  
**Consolidated Global TMC:** BCD

Only about half the tickets Nike travelers booked at U.S. points of sale in 2018 went through approved online tools, despite the fact that those who do seem to have an easy time of it; just 7 percent of those required help from a live agent. The company's 2018 pilot of a traveler-centric itinerary management platform could improve compliance. The sporting goods company, which earned \$36.4 billion worldwide in 2018 revenue, also launched a virtual payment program in the U.S., implemented new car rental and travel risk management suppliers and enhanced travel data and analytics reporting. This year, the company aims to simplify travel policy—it has a single policy globally—reduce friction points at every step of the travel journey, provide employees with better travel tools and enable them to travel smart. Policy changes will address sharing economy providers and traveler health and wellness. Nike's U.S.-booked air volume rose \$2 million in 2018 from 2017's \$88 million, and the company expects that figure to rise a modest \$3 million this year. Seventy percent of 2018 U.S.-booked air volume was for domestic travel.

## 45 PFIZER NEW YORK

**2018 U.S.-Booked Air Volume:** \$90 million  
**2018 Global Air Volume:** \$220 million  
**2018 U.S. T&E:** \$500 million

**2018 Global T&E:** \$1.2 billion

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

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

**Primary Global Online Booking Tool:** Concur

**Primary U.S. Payment Supplier:** American Express

**Card Program:** individual bill/central pay

**Primary Global Expense Supplier:** Concur

**Consolidated Global TMC:** BCD

Traveler satisfaction rates with Pfizer's travel program clock in at 97 percent, reflected in a 6 percent increase in in-channel booking. For 2018 U.S.-booked air volume, 80 percent of tickets were booked through approved online tools, and 83 percent of those required no agent assistance. The pharmaceutical company, which had \$536 billion in revenue in 2018 and expects U.S.-booked air spend to remain flat in 2019, continues to educate its employees through its Traveler Engagement program. It plans to add targeted communications based on travelers' personas. The company has a single global travel policy, and 55 percent of its U.S.-booked air volume is for travel outside the country.

## 49 INTEL SANTA CLARA, CALIF.

**2018 U.S.-Booked Air Volume:** \$89 million

**2018 Global Air Volume:** \$154 million

**2018 U.S. T&E:** \$115 million

**2018 Global T&E:** \$233 million

**Primary U.S. Online Booking Tool:** Concur

**Primary U.S. Payment Supplier:** American Express

**Card Program:** individual bill/central pay

**Primary U.S. Expense Supplier:** Concur

**Primary Global Travel Risk Management Supplier:** International SOS

**Consolidated Global TMC:** Amex GBT

Intel has continued rolling out SAP Concur globally. The company mandated preferred booking channels in 2017, and the share of U.S.-booked air tickets that went through approved online tools has risen from 67 percent in 2017 to 92 percent in 2018, 86 percent of those without agent assistance. The technology company, which generated revenue of \$70.8 billion worldwide in 2018, also has increased use of preferred hotels and airlines and in 2019 is integrating enhanced mobile technology and reporting, including the ability to visualize companywide travel spend, policy compliance and travel behavior trends. Almost three-quarters of Intel's 2018 U.S.-booked air volume was for domestic travel, and the company has a single global travel policy. U.S.-booked air spend rose 17 percent from 2017's \$76 million after having fallen 17 percent from 2016

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to 2017. The company expects that figure to rise \$2 million to \$91 million in 2019. While American Express handles 90 percent of Intel's U.S. travel, Travel and Transport Ultramar handles the remaining 10 percent. GBT handles all non-U.S. travel except the 4 percent handled by Ophir Tours, in Israel and the 1 percent handled by JTB.

## 50 DOWDUPONT WILMINGTON, DEL.

**2018 U.S.-Booked Air Volume:** \$85 million

**2018 Global Air Volume:** \$175 million

**2018 U.S. T&E:** \$212 million

**2018 Global T&E:** \$447 million

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

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

**Primary Car Rental Supplier:** Avis

**Primary U.S. Online Booking Tool:** Concur

**Primary Non-U.S. Online Booking Tool:** Cytric

**Primary U.S. Payment Supplier:** Citi

**Card Program:** individual bill, central pay

**Primary Global Expense Supplier:** Concur

**Primary Global Travel Risk Management Supplier:**

International SOS

**Consolidated Global TMC:** BCD

Chemical conglomerate DowDuPont's travel department synergized the policies and operations of two Fortune 500 companies—as well as their air, hotel and car rental program footprints—after Dow and Dupont merged in 2017. Notably, the single global travel policy now limits business class to flights of eight hours or more, up from six hours. Then, this year, DowDuPont split into three companies. The materials science division, which handles chemical commodities, became Dow; the agricultural chemicals division became Corteva and the specialty chemicals will remain as Dupont. The company's U.S.-booked air volume increased 13 percent in 2018. Of that volume, 55 percent is for travel outside the U.S. Of the U.S.-booked air tickets, two-thirds went through approved online tools, but 45 percent required agent assistance. The company's U.S.-booked air spend is expected to fall back to the 2017 level of \$75 million in 2019.

## 50 TIME WARNER NEW YORK

**2018 U.S.-Booked Air Volume:** \$85 million

Time Warner's U.S.-booked air volume dropped \$9 million in 2018, according to a BTN estimate. AT&T acquired the entertainment and media conglomerate in June 2018, and it now operates as WarnerMedia. According to AT&T's 2018 annual report, WarnerMedia revenue grew from \$31.7 billion in 2017 to \$33.5 billion in 2018. A year after acquiring Time Warner, AT&T sold 30 Hudson Yards to Related Cos. for \$2.2 billion on June 14, 2019, to help pay off debt, including that related to the \$85 billion acquisition of Time Warner. WarnerMedia will lease back the 1.5 million square feet of office space through early 2034.

## 52 GENERAL DYNAMICS FALLS CHURCH, VA.

**2018 U.S.-Booked Air Volume:** \$83 million

**Primary Air Supplier:** American

**Primary U.S. Online Booking Tool:** Concur

**Primary U.S. Expense Supplier:** Concur

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

BTN estimates U.S.-booked air spend at defense contractor and aerospace company General Dynamics increased 4 percent in 2018. The company's revenue increased 17 percent to \$36.2 billion. General Dynamics' \$9.6 billion acquisition of IT services firm CSRA aided the bottom line. General Dynamics employed 105,600 people at the end of 2018, up from 98,600 one year earlier.

## 53 CHEVRON SAN RAMON, CALIF.

**2018 U.S.-Booked Air Volume:** \$80.1 million

**2018 Global Air Volume:** \$191.9 million

**2018 U.S. T&E:** \$161.2 million

**2018 Global T&E:** \$295.3 million

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

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

**Primary Car Rental Suppliers:** Avis/Budget, Enterprise

**Primary Global Online Booking Tool:** Concur

**Primary U.S. Payment Supplier:** American Express

**Card Program:** individual bill/individual pay

**Primary Global Expense Supplier:** Concur

**Primary Global Travel Risk Management Supplier:**

International SOS

**Consolidated U.S. TMC:** CWT

In 2018, Chevron adjusted its travel policy to allow ridehailing when it's safe, reliable and cost-effective. The company does not, however, allow its travelers to use shared accommodations. It also completed the fifth year of a five-year strategy with CWT, which handles Chevron's U.S.-booked air volume. CWT, Travel Leaders/WTA, Quantum and Mas travel handle volume booked outside the U.S. The company also continued from a local-agency model to a shared agency model and continued rolling out SAP Concur Travel globally. Meanwhile, Chevron sourced and implemented a meetings and events system in the U.S., which it will expand this year.

As it did in 2018, the company will continue to work on its mobile strategy and mobile platform, designed to keep employees informed and provide them flexibility while traveling. The company plans to increase travelers' use of the mobile platform, the meetings and events system, analytics and reporting, and the SAP Concur booking tool. Of 2018 U.S.-booked air tickets, 69 percent went through preferred online tools, up from 66 percent a year earlier, and 75 percent of those required no agent assistance.

Chevron this year will continue to clarify and simplify travel policy. The company has a single global travel policy in which guidelines and procedures allow local business rules to vary as needed.

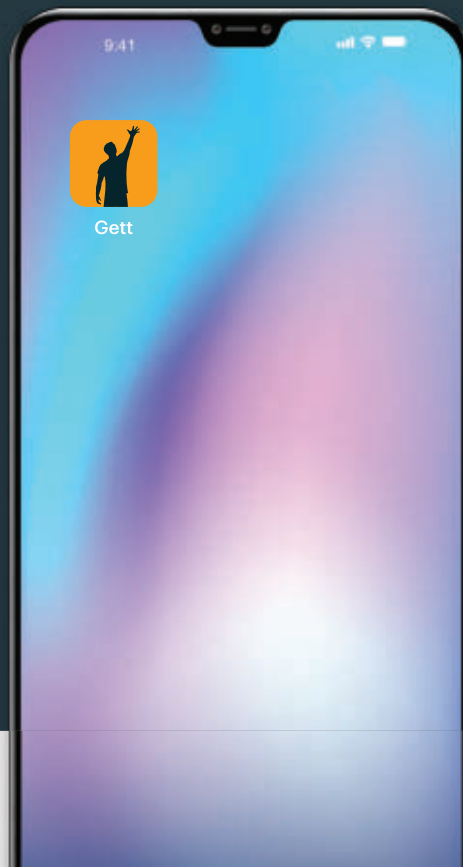
The company's U.S.-booked air spend rose 12 percent in 2018 from 2017's \$714 million, while revenue rose 18 percent to \$158.9 billion. Chevron estimates U.S.-booked air spend will increase 15 percent this year to \$92.1 million. Of the 2018 U.S.-booked air volume, 71 percent was for international travel.

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## 54 GENERAL MOTORS DETROIT

**2018 U.S.-Booked Air Volume:** \$80 million  
**Consolidated U.S. TMC:** Amex GBT

Automaker General Motors spent 8 percent less on U.S.-booked business travel in 2018 than in 2017, according to a BTN estimate. Sales increased 1 percent to \$147 billion. At year-end 2018, GM had 173,000 employees, 76,000 of whom were salaried, compared with 180,000 employees and 77,000 full-timers in 2017. GM plans further salaried workforce reductions in 2019, including 25 percent fewer executives. GM's 2018 business travel accounted for about 50,100 metric tons of carbon dioxide equivalent emissions, down 20 percent from 2017, but its methodology for both years was to extrapolate travel emissions data from 2013 operations based on the number of GM employees. GM expanded its Maven car sharing operation in 2018 expanded its reach to 24 cities in the U.S., Canada and Australia, six more than one year prior. Its Maven Gig program allows drivers for Uber, Lyft and other on-demand ground transportation providers, as well as food delivery services, to rent or lease cars. GM invested \$500 million in Lyft in 2016.

## 55 INTERNATIONAL MONETARY FUND WASHINGTON, D.C.

**2018 U.S.-Booked Air Volume:** \$77.7 million  
**Primary U.S. Hotel Suppliers:** Marriott, InterContinental, Hilton  
**Primary U.S. Payment Supplier:** BMO  
**Card Program:** central bill/central pay  
**Primary U.S. Expense Supplier:** PeopleSoft  
**Consolidated Global TMC:** BCD

The International Monetary Fund is an organization of 189 countries working to foster global monetary cooperation, secure financial stability, facilitate international trade, promote high employment and sustainable economic growth and reduce poverty. IMF U.S.-booked air volume dipped slightly in 2018. The organization expects it to inch back up to \$78.5 million this year. It has a single global travel policy, and all but 2 percent of U.S.-booked travel is international. It is working to expand the use of mobile platforms to enhance travelers' experience.

## 56 KOCH WICHITA, KAN.

**2018 U.S.-Booked Air Volume:** \$76.7 million  
**Primary U.S. Online Booking Tool:** Concur  
**Primary U.S. Expense Supplier:** Concur  
**Consolidated Global TMC:** CWT

BTN estimates that privately held conglomerate Koch boosted U.S.-booked air volume 6.5 percent in 2018 over its 2017 air spend. The company, which is parent to well-known brands like paper and building product manufacturer Georgia-Pacific and fuel and chemical producer Flint Hills Resources, began a venture at the tail end of 2017 investing in startups; Koch Disruptive Technologies' first foray into the space led a \$150 million investment in Insightec, an Israeli medical device manufacturer. According to Forbes, Koch revenue reached \$110 billion in 2018. Its 2017 global employee count, the most recent available, was 120,000.

## 57 GSK LONDON

**2018 U.S.-Booked Air Volume:** \$75 million  
**Primary Global Online Booking Tool:** Concur  
**Primary Global Expense Supplier:** Concur

BTN estimates pharma giant GSK spent \$8 million less on U.S.-booked air travel in 2018 than in 2017. Last year, GSK implemented SAP Concur Travel and Expense throughout the world. GSK revenue totaled 30.8 billion British pounds in 2018, up 2 percent year over year and up 5 percent at constant exchange rates. The company had about 95,400 employees at the end of 2018, down from about 98,500 one year earlier.

## 57 P&G CINCINNATI

**2018 U.S.-Booked Air Volume:** \$75 million  
**Primary U.S. Expense Supplier:** Concur  
**Consolidated Global TMC:** Egencia

Consumer goods company P&G increased its U.S.-booked air volume 25 percent in 2018, according to a BTN estimate. The company closed a \$4.2 billion acquisition of Merck's Consumer Health business last year, bringing on an estimated 3,300 employees in the deal. The acquired company is based in Darmstadt, Germany, and introduced brands into the P&G fold that have been successful in Asia and Latin America. P&G also acquired First Aid Beauty in an estimated \$250 million deal. Even with the onboarding of the Merck employees, P&G appears to have held overall employment steady at 92,000 in 2018.

## 57 WALMART BENTONVILLE, ARK.

**2018 U.S.-Booked Air Volume:** \$75 million

BTN estimates that retail giant Walmart's U.S.-booked air volume rose \$5 million, or 7 percent from BTN's 2017 estimate of \$70 million. Walmart's revenue for the fiscal year ending Jan. 31, 2019, rose 2.8 percent year over year to \$514.4 billion. Walmart U.S. contributed \$331.7 billion in net sales, representing 65 percent of global net sales. Sam's Club, which operates in 44 U.S. states and Puerto Rico, represented 11 percent. Walmart International, representing 26 additional countries, contributed the remaining 24 percent. Serving that segment, the company acquired a majority stake in India-based e-commerce marketplace Flipkart during the past fiscal year. Operating, selling, general and administrative expenses, which include travel, represented 21 percent of net sales, down 0.5 percentage points from the previous year. According to its annual report, Walmart employed 2.2 million associates—1.5 million in the U.S. and 700,000 elsewhere—down from 2.3 million a year prior.

## 60 UBS ZURICH

**2018 U.S.-Booked Air Volume:** \$73 million  
**2018 Global T&E:** \$425 million  
**Consolidated Global TMC:** BCD

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Albany, NY	44	\$167.76	\$44.58	\$93.79	\$307.13	-4.00%
Albuquerque, NM	37	\$127.55	\$42.48	\$86.53	\$256.56	-5.24%
Allentown, PA	34	\$103.84	\$42.54	\$89.88	\$236.26	2.58%
Anaheim, CA	31	\$215.59	\$45.91	\$103.21	\$364.71	2.50%
Atlanta, GA	55	\$198.28	\$46.36	\$106.37	\$350.91	-7.89%
Austin, TX	40	\$233.58	\$43.30	\$103.12	\$379.99	8.64%
Bakersfield, CA	42	\$145.12	\$46.56	\$85.87	\$277.55	-14.88%
Baltimore, MD	32	\$171.88	\$47.27	\$109.30	\$328.45	-9.21%
Baton Rouge, LA	30	\$141.03	\$30.88	\$90.91	\$262.82	3.70%
Biloxi, MS	54	\$126.30	\$55.23	\$87.78	\$269.31	14.58%
Birmingham, AL	56	\$154.79	\$40.75	\$85.78	\$281.32	-11.39%
Boston, MA	31	\$225.70	\$47.12	\$113.82	\$386.64	-18.83%
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BTN estimates that investment bank and financial services firm UBS's U.S.-booked air volume rose nearly 9 percent in 2018. The firm's global T&E held steady, even as general and administrative expenses declined 2.2 percent, according to its annual report. Operating income rose from \$29.6 million in 2017 to \$30.2 million in 2018. UBS last year unveiled its NextGen Open Booking service. BCD agent teams in Zurich, London and New York, which account for 90 percent of UBS's travel, handle company calls and are available 17 hours per day, five days per week. Those agents all use the same technology, meaning a booking can be managed in any of the three centers, and they all follow a universal corporate policy except in cases where local laws or employee agreements require deviation. The model has enabled UBS to deploy travel processes and technology more quickly. UBS reported more than 68,000 employees worldwide as of the end of 2018, about a third of them in Switzerland, up from 62,000 as of the end of 2017.

## 61 SALESFORCE SAN FRANCISCO

**2018 U.S.-Booked Air Volume:** \$72 million  
**Primary Air Suppliers:** United, Delta, American  
**Primary Hotel Suppliers:** Marriott, Hilton, Hyatt  
**Primary Car Rental Suppliers:** Avis, Budget  
**Primary Global Online Booking Tool:** Concur  
**Primary U.S. Payment Supplier:** American Express  
**Card Program:** individual bill/central pay  
**Primary Global Expense Supplier:** Concur  
**Consolidated Global TMC:** BCD

Growing cloud-based customer relationship management firm Salesforce reported \$10 billion in 2018 annual revenue and has implemented travel programs in Argentina, Brazil, Morocco and Israel under its global travel policy, which remained largely unchanged in 2018. It continues to use multiple distribution channels like SAP Concur TripLink and New Distribution Capability to provide rich content for booking, to capture data and to increase savings. Salesforce's U.S.-booked air spend rose 31 percent in 2018 from 2017's \$55 million. Seventy percent of U.S.-booked air spend was on domestic flights in 2018. Of tickets booked in the U.S., 85 percent went through approved online tools, and 70 percent of those required no agent assistance. Big change for Salesforce in 2019, however; it departed long-time partner BCD in favor of Amex GBT.

## 62 COGNIZANT TEANECK, N.J.

**2018 U.S.-Booked Air Volume:** \$68 million  
**2018 Global Air Volume:** \$114 million  
**Primary Air Suppliers:** American, United, Delta  
**Primary Hotel Suppliers:** Marriott, InterContinental  
**Primary Car Rental Suppliers:** Avis, Hertz  
**Primary Global Online Booking Tool:** Concur  
**Primary U.S. Payment Supplier:** American Express  
**Card Program:** individual bill/central pay  
**Primary Global Expense Supplier:** Concur  
**Consolidated Global TMC:** HRG

IT service provider Cognizant's U.S.-booked air volume rose \$10 million from 2017's \$58 million as revenue increased \$2 billion to \$16.1 billion. The company, which has a single global travel policy, expects the figure to rise just

\$2 million this year. Last year, it implemented HRG as its globally consolidated travel agency, including Follow the Sun services in most markets, global profiles for all employees, a consolidated relocation desk and a centralized ticketing desk. American Express Global Business Travel acquired HRG in July of last year. Cognizant also launched SAP Concur Travel & Expense in India, achieving a 99 percent utilization rate for eligible trips, compared with 88 percent online adoption globally. Also in India, the travel program established a meetings and events team that sourced more than 200 events and delivered about \$500 million in savings. In 2019, Cognizant continues to expand air and hotel price assurance tools globally, negotiating more dynamic discounts with hotels in the 100- to 250-room night range. The company is considering a gamification or savings-sharing program to encourage cost-efficient decisions among travelers. Sixty-seven percent of Cognizant's 2018 U.S.-booked air volume was for domestic travel.

## 63 HONEYWELL CHARLOTTE, N.C.

**2018 U.S.-Booked Air Volume:** \$65 million  
**Consolidated U.S. TMC:** BCD

BTN estimates conglomerate Honeywell's U.S.-booked air volume decreased slightly in 2018. Sales increased 3 percent to \$41.8 billion. Honeywell spun off a few lines of business into stand-alone companies last year. Resideo Technologies is comprised of Honeywell's former Homes and ADI Global Distribution businesses, while Garrett is Honeywell's former Transportation Systems business. Honeywell moved its corporate headquarters from Morris Plains, N.J., to Charlotte, N.C., in 2019. At the end of 2018, the company had 114,000 employees, 44,000 of whom were in the U.S., versus 131,000 total and 46,000 U.S.-based employees one year earlier, before the spinoffs.

## 63 PEPSICO PURCHASE, N.Y.

**2018 U.S.-Booked Air Volume:** \$65 million  
**Primary U.S. Expense Supplier:** Concur

BTN estimates that PepsiCo increased its U.S.-booked air volume to \$65 million in 2018 from \$53 million the prior year. Net revenue at the beverage and snack food conglomerate rose 2 percent. PepsiCo reported 267,000 employees globally as of the end of last year, including about 114,000 in the U.S., up from 263,000 globally at the end of 2017.

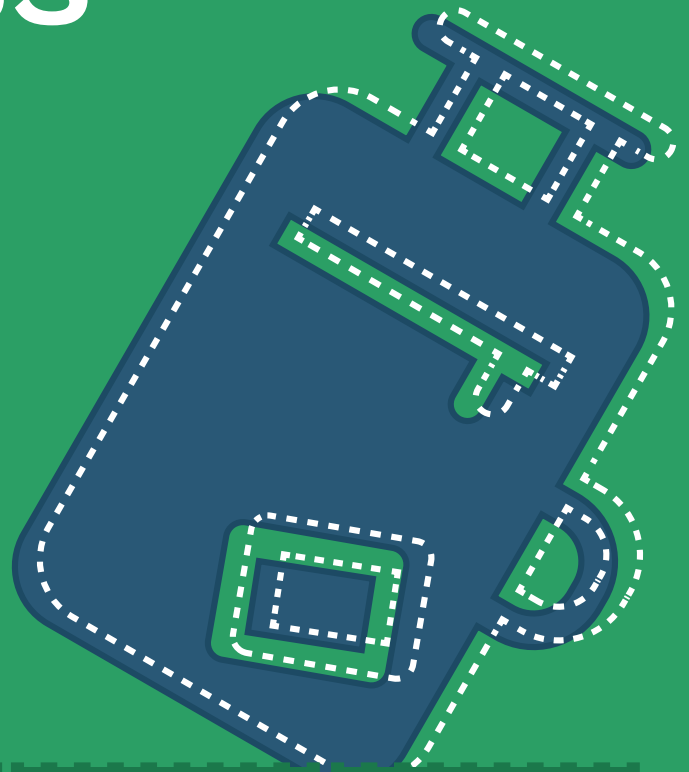
## 65 3M ST. PAUL MINN.

**2018 U.S.-Booked Air Volume:** \$64 million  
**2018 Global Air Volume:** \$106 million  
**2018 U.S. T&E:** \$170 million  
**2018 Global T&E:** \$330 million  
**Primary Air Supplier:** Delta  
**Primary Hotel Supplier:** Hilton  
**Primary Car Rental Suppliers:** National, Enterprise  
**Primary Global Online Booking Tool:** Concur  
**Primary U.S. Payment Supplier:** Citi  
**Card Program:** individual bill/central pay

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**Primary Global Expense Supplier:** Concur  
**Primary Global Travel Risk Management Supplier:** WorldAware  
**Consolidated U.S. TMC:** CWT

3M's U.S.-booked air spend rose 12 percent in 2018 from 2017's \$57 million, and that figure is expected to stay flat this year. The company consolidated its Asia/Pacific travel management company services, primarily with BCD, deployed SAP Concur Travel & Expense and rolled out credit cards across the region. 3M also finalized a strategy to consolidate TMC services in EMEA and deployed Concur in Poland. Concur and corporate card deployments will continue throughout 2019 and 2020 in the EMEA markets. 3M has a single global travel policy and is looking to improve on program compliance, about 80 percent of 2018 U.S.-booked tickets going through approved online tools; 65 percent of those required no agent assistance. Last year, the company mandated that travelers book hotels through the company's online booking tool or dedicated global travel agencies, and in 2019, the company has been reinforcing that mandate. Eighty percent of the company's U.S.-booked air spend was for domestic travel in 2018.

## 66 ABBVIE NORTH CHICAGO, ILL.

**2018 U.S.-Booked Air Volume:** \$62 million

BTN estimate pharmaceutical firm AbbVie decreased its U.S.-booked air spend in 2018. Revenue for the maker of rheumatoid arthritis drug Humira and other pharmaceuticals increased 16 percent to nearly \$32.8 billion. The company employed about 30,000 people at the end of January 2019, about 1,000 more than it had one year earlier. In June 2019, AbbVie announced plans to acquire fellow CT 100 pharma company Allergan for about \$63 billion, pending the approval of shareholders and federal regulators.

## 67 OMNICOM GROUP NEW YORK

**2018 U.S.-Booked Air Volume:** \$61 million

BTN estimates that marketing and communications firm Omnicom Group spent \$61 million on U.S.-booked air travel in 2018, holding steady with the prior year. The firm reported that its salary and service costs, which include client-related travel costs alongside labor costs, rose 0.7 percent to \$78.9 million in 2018. Revenue was \$15.3 billion. Omnicom reported 70,400 employees globally at the end of 2018, down from 77,300 a year prior.

## 68 BP LONDON

**2018 U.S.-Booked Air Volume:** \$60 million

**2018 Global Air Volume:** \$160 million

**Primary Air Suppliers:** Star Alliance, British Airways, American, Emirates, Southwest

**Primary Hotel Suppliers:** Hilton, InterContinental, Accor, Marriott

**Primary Car Rental Supplier:** Hertz

**Primary Global Online Booking Tool:** GetThere

**Primary U.S. Payment Supplier:** Citi Mastercard  
**Card Program:** individual bill/central pay  
**Primary U.S. Expense Supplier:** Concur  
**Consolidated Global TMC:** CWT

BP instantly became the highest-profile client of travel management company Egencia when the Expedia subsidiary inked a deal to replace CWT in 63 countries and step in for GetThere as the energy company's global online booking tool. BP has targeted a full cutover to Egencia by the end of January 2020. BP has a single global travel policy and is assessing how it applies its lowest logical fare policy in light of branded airfares and soon New Distribution Capability. BP's revenue rose 24 percent in 2018 to \$309.7 billion, while U.S.-booked air spend increased 11 percent from 2017's \$54 million. The company expects that figure to stay flat at \$60 million in 2019. Of 2018 U.S.-booked air spend, 65 percent was for travel abroad, and 90 percent went through approved online tools.

## 68 LILLY INDIANAPOLIS

**2018 U.S.-Booked Air Volume:** \$60 million

BTN estimates Lilly's U.S.-booked air volume rose \$10 million from 2017 to 2018. The pharmaceutical company's global revenue rose 7 percent to \$24.6 billion, and its U.S. revenue rose 8 percent to \$13.9 billion, driven by sales of new pharmaceutical products. Its marketing, selling and administrative expenses decreased 1 percent to \$6.6 billion. There were lower expenses for late-life-cycle products but increased marketing expenses for new products. In May 2018, Lilly agreed to acquire AurKa Pharma, and in June 2018, it completed its acquisition of Armo Biosciences. The company's headcount decreased from 40,655 at the end of 2017 to 38,680 at the end of 2018.

## 68 SCHLUMBERGER PARIS

**2018 U.S.-Booked Air Volume:** \$60 million

BTN estimates Schlumberger's U.S.-booked air volume fell \$3 million from 2017 to 2018. The oilfield services technology provider employs approximately 100,000 people in over 85 countries. Its revenue grew 8 percent to \$33 billion in 2018. Schlumberger has expanded its use of remote operations centers to service clients and support its products, reducing the company's travel.

## 68 WPP LONDON

**2018 U.S.-Booked Air Volume:** \$60 million

WPP's U.S.-booked air volume jumped \$12 million in 2018, according to a BTN estimate. Its global employee headcount decreased from 134,428 at the end of 2017 to 133,903 at the end of 2018, and revenue declined slightly from 15.8 billion British pounds to 15.6. In 2018, WPP made 15 acquisitions, according to M&A advisor Results International. One made public was Bomtempo Anahory & Ralha, an independent creative agency in Portugal. According to WPP's annual report, it has purchased and permanently retired almost 1.5 million carbon credits to offset carbon emissions from air travel since 2007. In 2018, the advertising company purchased offsets for 100 percent of its air travel emissions, equaling 85,459 tons of carbon dioxide equivalent.

72 IPG  
NEW YORK

**2018 U.S.-Booked Air Volume:** \$59.4 million  
**2018 Global Air Volume:** \$90.9 million  
**2018 U.S. T&E:** \$196.2 million  
**2018 Global T&E:** \$279.6 million  
**Primary Air Suppliers:** Delta, American, United  
**Primary Hotel Suppliers:** Hyatt, Westin  
**Primary Car Rental Suppliers:** Avis, Hertz  
**Primary U.S. Online Booking Tool:** Concur  
**Primary U.S. Payment Supplier:** American Express  
**Card Program:** individual bill/individual pay  
**Primary U.S. Expense Supplier:** Concur  
**Primary Non-U.S. Expense Supplier:** SAP VantagePoint  
**Primary Global Travel Risk Management Supplier:** WorldAware  
**Consolidated U.S. TMC:** Amex GBT

Advertising and marketing firm IPG's U.S.-booked air volume rose 4 percent in 2018 from 2017's \$57.2 million, and the company expects that figure to rise 9 percent this year to \$64.5 million. Of the volume purchased at U.S. points of sale in 2018, just over half was for domestic travel. Ninety-five percent of 2018 U.S.-booked tickets went through approved online tools, and agents pitched in on just 5 percent of those. American Express Global Business Travel handled all of IPG's 2018 U.S. business and three-quarters of its business elsewhere. HRG serviced another 20 percent of non-U.S. business, and Dubai-based Mohebi Aviation handled the rest.

73 SHIRE  
DUBLIN

**2018 U.S.-Booked Air Volume:** \$59 million  
**Primary Global Online Booking Tool:** Concur  
**Primary U.S. Payment Supplier:** Bank of America Merrill Lynch  
**Card Program:** individual bill/central pay  
**Primary Global Expense Supplier:** Concur  
**Primary Global Travel Risk Management Supplier:** International SOS  
**Consolidated Global TMC:** BCD

Shire reduced the length of its global policy by 50 percent in 2018 to make it easier to read and to follow, removing ambiguous language and unnecessary or unenforceable rules. Shire worked with BCD Travel to create a leisure travel program for employees, and the company simplified and automated pretrip approval. Shire and BCD also developed a specialized travel agent desk for healthcare professionals, as regulations around the healthcare industry require more agent management, such as arranging prepaid, direct billed travel transactions. A specialized agent desk boosts compliance with regulations, while separating healthcare travel out also improves the productivity of the traditional transient travel desk.

The biopharmaceutical firm also completed the companywide alignment of SAP Concur that began after Shire's 2016 acquisition of Baxalta. First, Shire implemented Concur Travel in the more than 50 countries in which it operates. Later came a global roll out of Concur Expense, and in 2018, Shire redeployed Concur Travel to connect with Concur Expense. Shire rolled out the redeployment over four phases to avoid employee disruption.

More assimilation is on the way. Takeda acquired Shire on Jan. 8, 2019, and the travel team will spend 2019 integrating the programs, which are similar

sizes; Shire's 2018 revenue was \$15.4 billion, while Takeda's 2017 fiscal-year revenue was \$16.5 billion, based on the yen-to-U.S. dollar conversion rate for the last day of the fiscal year, April 31, 2018. Shire's travel program kept the pending merger in mind as it made its way through its 2018 policy refresh.

The company's U.S.-booked air volume rose 3 percent in 2018 to \$59 million, and the company expects that figure to maintain in 2019. Of its U.S.-booked air volume, 85 percent was for domestic travel. And 72 percent of U.S.-booked air tickets went through approved online tools.

74 AIRBUS  
LEIDEN, NETHERLANDS

**2018 U.S.-Booked Air Volume:** \$58 million

European aerospace mainstay Airbus saw its U.S.-booked air volume fly a bit higher last year, up \$3 million from 2017. A company-record 800 commercial aircraft deliveries helped drive an overall revenue increase from \$65.3 billion in 2017 to \$70.5 billion in 2018. The company announced in February that it would cease production on its flagship A380 aircraft, the world's largest passenger jet, by 2021. The sunsetting affects 3,500 jobs, but a major order of two smaller models by Emirates will mitigate job losses, according to the company.

74 ALLERGAN  
DUBLIN

**2018 U.S.-Booked Air Volume:** \$58 million

After debuting in the BTN 100 in 2015, pharmaceutical company Allergan saw its U.S.-booked air spend drop for the third consecutive year. BTN's estimated 2018 volume came in \$6 million lower than 2017's spend. The steady decline wasn't unexpected, however. The Dublin-based maker of Botox and dozens of other drugs divested its generic pharmaceuticals business in 2016, nearly halving its workforce to 16,700 in the process. Allergan started growing again in 2017, adding about 1,100 jobs that year to reach 17,800, but the company cut that figure back down to 16,900 in 2018.

74 TOYOTA MOTOR NORTH AMERICA  
PLANO, TEXAS

**2018 U.S.-Booked Air Volume:** \$58 million

**Primary U.S. Air Suppliers:** Delta, American, United  
**Primary U.S. Hotel Suppliers:** Marriott, Hilton, InterContinental  
**Primary U.S. Car Rental Suppliers:** National, Hertz  
**Primary U.S. Online Booking Tool:** GetThere  
**Primary U.S. Payment Supplier:** American Express  
**Card Program:** central bill/central pay  
**Primary U.S. Expense Supplier:** Chrome River  
**Primary U.S. Travel Risk Management Supplier:** International SOS  
**Consolidated U.S. TMC:** BCD

Even though Toyota Motor North America added an affiliate company to its managed travel program, its U.S.-booked air spend dropped 17 percent in 2018. The company expects that figure to maintain in 2019. Contributing to the contraction is the company's introduction last year of hotel rate caps. It also began mandating booking channels, and the percentage of U.S.-booked air tickets that go through approved tools

bumped up from 71 percent in 2017 to 75 percent in 2018; 77 percent of those required no agent assistance.

Also in 2018, the Toyota Motor North America travel team supported the expense team as it automated air expense reconciliation. Airfare continues to be centrally billed, but the responsibility for reconciliation has moved from accounting to the traveler. Previously, travelers could change, at the point of sale, the business travel account coding for any given project, leaving accounting with irreconcilable information. Now, the system sends a centrally billed air ticket to the traveler's "wallet" in the expense tool, and the traveler must allocate it appropriately; the system does not allow invalid accounting combinations.

Toyota Motor North America also added Canadian and Mexican point-of-sale transactions to its supplier agreements and put Canada on SAP Concur Travel; the country already was on Concur Expense, and Mexico was on both the travel and expense tools. Toyota sets policy by country. Of the 2018 U.S.-booked air spend, 47 percent was for domestic travel, as it was in 2017.

Also last year, Toyota Motor North America launched a traveler communications program, enabling, for the first time, communication beyond posting on the online booking tool interface. Toyota Motor North America presents program updates and hot topics to a live audience and distributes videos of those sessions to the traveler list. The communications effort also sends out supplier promotions and includes the occasional email if timing is critical. The initiative has prompted interaction and conversation with travelers.

The company had pledged in 2017 to invest \$10 billion by 2021 in the U.S., focusing on electric vehicles. This spring, it upped the ante to \$13 billion, planning 586 new jobs at U.S. plants. The company reported \$260.8 billion of revenue in 2018.

## 77 21ST CENTURY FOX NEW YORK

**2018 U.S.-Booked Air Volume:** \$57 million

**2018 U.S. T&E:** \$77.3 million

**Primary Air Suppliers:** American, Delta, British Airways

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

**Primary Car Rental Suppliers:** National/Enterprise, Hertz

**Primary U.S. Online Booking Tool:** GetThere

**Primary Non-U.S. Online Booking Tool:** Concur

**Primary U.S. Payment Supplier:** American Express

**Card Program:** individual bill/central pay

**Primary U.S. Expense Suppliers:** Concur, PeopleSoft

**Primary Global Travel Risk Management Supplier:**

International SOS

**Consolidated Global TMC:** HRG

2018 was the last year for 21st Century Fox, the global mass media company with roots dating back to the Golden Age of Hollywood. The company, which reported \$30.4 billion in revenue in 2018, was sold in March 2019 to The Walt Disney Co. 21st Century Fox's U.S.-booked air spend stayed flat from 2017 to 2018. Despite the ownership change, the company set a 2019 goal of consolidating its global travel policy and automating travel profiles for its employees and freelancers. It had implemented a global travel program in 95 percent of the countries where it operates in 2017. Until now, travel policies have varied by business unit. Of the 2018 U.S.-booked air volume, 98 percent of tickets eligible to be booked online were booked through approved online tools; 58 percent of 2018 U.S.-booked air volume was for domestic travel.

## 78 MARSH & MCLENNAN COS. NEW YORK

**2018 U.S.-Booked Air Volume:** \$56.8 million

**2018 Global Air Volume:** \$114 million

**2018 U.S. T&E:** \$132 million

**2018 Global T&E:** \$246 million

**Primary U.S. Air Suppliers:** Delta, United, American

**Primary U.S. Hotel Suppliers:** Marriott, Hilton, Accor

**Primary U.S. Car Rental Suppliers:** National/Enterprise, Avis

**Primary U.S. Online Booking Tool:** GetThere

**Primary Non-U.S. Online Booking Tool:** KDS

**Primary U.S. Payment Supplier:** American Express

**Card Program:** individual bill/individual pay

**Primary U.S. Travel Risk Management Supplier:** WorldAware

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

As it did last year, Marsh & McLennan Cos. in 2018 focused on cost containment. Revenue rose from \$14 billion in 2017 to \$15 billion last year, while U.S.-booked air spend increased 21 percent from \$55.6 million. The company expects to limit 2019 cost increases, as well. It moved to multiyear hotel agreements in 2017 and continued that strategy for 2018 and 2019. It launched traveler engagement and communications initiatives and is looking to streamline travel processes while integrating acquisitions, particularly JLT, into the travel program over time. Marsh & McLennan continues to monitor compliance to the corporate card, bookings through its designated booking channels and support of preferred suppliers.

## 79 ALLSTATE NORTHBROOK, ILL.

**2018 U.S.-Booked Air Volume:** \$55 million

**2018 Global Air Volume:** \$58 million

**2018 U.S. T&E:** \$255 million

**2018 Global T&E:** \$300 million

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

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

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

Budget, Avis

**Primary U.S. Online Booking Tool:** Concur

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

**Primary U.S. Payment Supplier:** Citi

**Card Program:** individual bill, central pay

**Primary U.S. Expense Supplier:** Concur

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

**Consolidated Non-U.S. TMC:** Radius Partners

Fortune 500 insurance company Allstate earned \$40 billion in revenue in 2018, nearly all of it from North American operations, compared with \$38 billion in 2017. Meanwhile, U.S.-booked air volume stayed flat. Ninety-one percent of U.S.-booked air tickets went through approved online tools, and only 18 percent of those required agent assistance. Eighty-eight percent of U.S.-booked air volume was for domestic flights. In 2018, the company capped personal car mileage reimbursement at 125 miles per day and rolled out SAP Concur Expense in the U.S. and Canada. In 2019, Concur became Allstate's primary non-U.S. booking tool, aligning with the U.S. This year, Allstate also deployed Oversight Systems' robotics solution to audit all expense reports, DVI for data visualization and analysis and EvedPay for meetings and events payments. In the fourth quarter, Allstate will roll out Groupize for management of simple meetings.

## 79 STRYKER

KALAMAZOO, MICH.

**2018 U.S.-Booked Air Volume:** \$55 million

After ticking down \$2 million in 2017, medical device and equipment maker Stryker's U.S.-booked air volume reversed that decline in 2018, jumping back up \$3 million to \$55 million. The firm has spent billions on acquisitions over the past several years, and that investment has led to significant growth in the company's headcount to more than 36,000 employees as of the end of 2018, an increase of 10,000 since 2015. U.S.-booked air volume has tracked that growth, ballooning by more than \$9 million over the same period.

## 81 BARCLAYS

LONDON

**2018 U.S.-Booked Air Volume:** \$54 million

Barclays' U.S.-booked air volume rose \$5 million in 2018, according to a BTN estimate. The British investment bank spent 153 million British pounds on travel and accommodations in 2018, up 3 million from 2017. The company's income was 211 billion pounds, unchanged from 2017. As of Dec. 31, 2018, Barclays employed 83,500 full-time equivalent employees, up from 79,900 a year earlier. The company reduced its carbon emissions, including those from business travel, by 38 percent, a big jump from 26.1 percent the previous year, and thereby exceeding its target of 30 percent by 2018. As of August, the company was in talks to sell its New York-based automated options trading business to electronic market maker GTS.

## 81 THERMO FISHER SCIENTIFIC

WALTHAM, MASS.

**2018 U.S.-Booked Air Volume:** \$54 million

**2018 Global Air Volume:** \$91 million

**2018 U.S. T&E:** \$121 million

**2018 Global T&E:** \$168 million

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

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

**Primary Car Rental Supplier:** Hertz

**Primary Global Online Booking Tool:** Concur

**Primary U.S. Payment Supplier:** Bank of America

**Card Program:** individual bill, central pay

**Primary U.S. Expense Supplier:** Concur

**Primary Global Travel Risk Management Supplier:** WorldAware

**Consolidated Global TMC:** Amex GBT

Biotech firm Thermo Fisher Scientific generated \$24 billion in worldwide revenue in 2018, and company growth, fueled in part by strategic acquisitions, has been reflected in rising U.S.-point-of-sale air bookings, from \$45 million in 2017 to \$54 million in 2018 and a projected \$60 million on 2019. Eighty percent of U.S.-booked air volume in 2018 was for domestic travel. The company has a single consolidated global travel policy. Only 51 percent of U.S.-booked tickets went through approved online tools in 2018, and 51 percent of those required agent assistance. That should improve in 2019, however, as Thermo Fisher Scientific looks to expand American Express Global Business Travel to more of its acquired subsidiaries, as well

as to countries where it has smaller employee populations. It's also introducing Amex GBT's Air Re-shop this year, and the company is considering changes to its meal allowance policy.

## 81 VERIZON

NEW YORK

**2018 U.S.-Booked Air Volume:** \$54 million

**2018 U.S. T&E:** \$165 million

**2018 Global T&E:** \$175 million

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

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

**Primary Car Rental Suppliers:** National, Avis

**Primary Global Online Booking Tool:** Concur

**Primary U.S. Payment Supplier:** American Express

**Card Program:** individual bill, individual pay

**Primary Global Expense Supplier:** Concur

**Consolidated Global TMC:** Amex GBT

Verizon's U.S.-booked air spend increased \$2 million from 2017's \$52 million while the telecommunications giant also made a concerted effort to reduce unnecessary travel last year. It expects U.S.-booked air spend to inch up to \$55 million in 2019. The vast majority of Verizon's 2018 U.S.-booked air volume, 90 percent, was domestic. The company, which reported \$130 billion in revenue last year, has a single global consolidated travel policy, and 96 percent of tickets booked in the U.S. in 2018 went through approved online tools, 94 percent of those requiring no outside assistance. Verizon is rolling SAP Concur out to its India operations, as well.

## 84 CORNING

CORNING, N.Y.

**2018 U.S.-Booked Air Volume:** \$53 million

**2018 Global Air Volume:** \$76 million

**2018 U.S. T&E:** \$93 million

**2018 Global T&E:** \$142 million

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

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

**Primary Car Rental Supplier:** Avis

**Primary Global Online Booking Tool:** Concur

**Primary U.S. Payment Supplier:** Citi Mastercard

**Card Program:** central bill, central pay

**Primary Global Expense Supplier:** Concur

**Primary Global Travel Risk Management Supplier:** International SOS

**Consolidated Global TMC:** Amex GBT

Glass product manufacturer Corning generated \$11.3 billion in revenue in 2018. Just 24 percent of U.S.-booked air volume was for domestic travel. In 2018, Corning also extended its card program with Citi MasterCard and implemented Cvent and an event policy globally. In 2019, the company is consolidating more countries under American Express Global Business Travel, switching its connecting airport for international flights from Newark International Airport to Washington Dulles and reducing time spent on hotel RFPs. Fifty-eight percent of 2018 U.S.-booked air tickets went through approved online tools, and 52 percent of those required agent assistance.

## 85 CATERPILLAR DEERFIELD, ILL.

**2018 U.S.-Booked Air Volume:** \$52.7 million  
**2018: Global Air Volume:** \$95.4 million  
**2018 U.S. T&E:** \$94 million  
**2018 Global T&E:** \$260 million  
**Primary U.S. Air Suppliers:** United, Delta  
**Primary U.S. Hotel Suppliers:** Hilton, InterContinental, Marriott  
**Primary U.S. Car Rental Suppliers:** National, Enterprise  
**Primary U.S. Online Booking Tool:** Concur  
**Primary Non-U.S. Booking Tool:** E-Travel Management  
**Primary U.S. Payment Supplier:** US Bank  
**Card Program:** central bill/central pay  
**Primary Global Expense Supplier:** Concur  
**Primary U.S. Travel Risk Management Suppliers:** International SOS for medical & emergency, Anvil for duty of care  
**Consolidated U.S. TMC:** BCD

Caterpillar improved the discounts it receives from air suppliers and changed its travel policy to eliminate use of premium economy class. It also reduced regional exceptions to its global travel policy. This year, it aims to improve compliance with its travel management company—BCD globally except for 5 percent of business outside the U.S.—hotel and air suppliers. It also expects to boost adoption of its online booking tool. In 2018, 77 percent of U.S.-booked air tickets went through approved online tools. Of the company's U.S.-booked air volume in 2018, 58 was for international travel. U.S.-booked air spend rose 18.6 percent in 2018 from 2017's \$44.4 million, while revenue rose 20.2 percent to \$54.7 billion. The company expects U.S.-booked air spend to rise 10.2 percent to \$58 million this year.

## 86 AMGEN THOUSAND OAKS, CALIF.

**2018 U.S.-Booked Air Volume:** \$52.4 million  
**Primary Air Suppliers:** Star Alliance, Sky Team, Southwest  
**Primary Hotel Suppliers:** Marriott, Hilton, Hyatt  
**Primary Car Rental Supplier:** Hertz  
**Primary Global Online Booking Tool:** Concur  
**Primary U.S. Payment Supplier:** American Express  
**Card Program:** individual bill, central pay  
**Primary Global Expense Supplier:** Concur  
**Primary Global Travel Risk Management Supplier:** International SOS  
**Consolidated Global TMC:** CWT

Biopharmaceutical company Amgen generated \$23.8 billion in revenue in 2018 while reducing U.S.-booked air spend 8 percent from 2017's \$56.8 million. Of the 2018 U.S.-booked air volume, 58 percent was for crossborder travel. Amgen projects that figure to inch up to \$54 million this year. Seventy-eight percent of 2018 U.S.-booked tickets went through approved online tools—up from 69 percent in 2017—and just 3 percent of those required agent assistance. The company has a single global travel policy. In 2018, the company reviewed and tweaked policy, including guidance on meals, as well as making sedans eligible for senior staff. It also implemented hotel rate caps in certain cities, instituted pretrip approval for certain markets, expanded airfare and hotel price tracking to a total of 30 countries and implemented 24/7 dedicated travel agents. In 2019, it will continue to focus on cost management and to globalize onto standard platforms, such as online booking tool, expense management and meetings registration.

## 87 BAYER U.S. PITTSBURGH

**2018 U.S.-Booked Air Volume:** \$52 million  
**2018 Global Air Volume:** \$161 million  
**2018 U.S. T&E:** \$110 million  
**2018 Global T&E:** \$405 million  
**Primary Air Suppliers:** United, Delta, American  
**Primary Hotel Suppliers:** Marriott, Hilton, InterContinental  
**Primary Car Rental Supplier:** Hertz  
**Primary U.S. Online Booking Tool:** Concur  
**Primary U.S. Payment Supplier:** Citi  
**Card Program:** individual bill, central pay  
**Primary U.S. Expense Supplier:** Concur

The U.S. division of German pharmaceutical and life sciences company Bayer earned \$4.35 billion in 2018. The multinational nature of Bayer's business meant that the majority of Bayer U.S.'s 2018 U.S.-booked volume, 66 percent, was for crossborder travel. In 2019, U.S.-point-of-sale air bookings are expected to reach \$60 million, rebounding almost to 2017's \$61 million. Bayer integrated its Monsanto subsidiary into its travel program in 2018. In 2019, Bayer U.S. plans to consolidate its global operations under a single TMC. BCD Travel currently handles 60 percent of U.S. business and CWT manages the rest. Also this year, Bayer U.S. is consolidating its card program. Bayer U.S. has a single global travel policy. Eighty percent of U.S.-booked tickets went through approved online tools, though 40 percent of those required agent assistance.

## 88 COCA-COLA ATLANTA

**2018 U.S.-Booked Air Volume:** \$52 million

Coca-Cola's U.S.-booked air spend rose \$3 million in 2017, according to a BTN estimate. Net operating revenue was \$31.9 billion, down 10 percent from 2017. Its number of global employees increased a slight 1.3 percent to 62,600.

## 89 EPIC VERONA, WIS.

**2018 U.S.-Booked Air Volume:** \$51 million  
**Consolidated U.S. TMC:** Fox World Travel

Epic's U.S.-booked air volume has been on the downswing. It dropped 9.9 percent in 2018 from 2017's \$56.6 million, and the company expects it to follow a similar pattern in 2019. Last year, the travel program put an emphasis on improving traveler relations through education and communications, and it will continue to work closely with travelers. The electronic healthcare record company has a centralized, in-house travel team, staffed 24/7/365, that works directly with individual travelers and groups of travelers. Epic has focused on creating efficient travel management processes within that structure and on instilling personalization in order to enhance the traveler experience. The company has a single global travel policy, and 81 percent of its 2018 U.S.-booked air volume was for domestic travel.

## 90 DAIMLER STUTTGART, GERMANY

**2018 U.S.-Booked Air Volume:** \$50.4 million  
**Primary U.S. Air Suppliers:** Delta, United, American  
**Primary U.S. Hotel Suppliers:** Marriott, Hilton, Accor  
**Primary U.S. Car Rental Suppliers:** National/Enterprise, Avis  
**Primary U.S. Online Booking Tool:** GetThere  
**Primary Non-U.S. Booking Tools:** Cytric, E-Travel Management  
**Primary U.S. Payment Supplier:** US Bank  
**Card Program:** central bill/central pay  
**Primary U.S. Travel Risk Management Supplier:**  
 International SOS  
**Consolidated U.S. TMC:** BCD

Daimler anticipates a substantial cut in U.S.-booked travel spend this year. From 2017's \$49.8 million, it rose 1 percent in 2018, but Daimler expects that figure to drop 31 percent to \$35 million this year. The company's revenue ticked up slightly from 164.3 billion euros in 2017 to 167.4 billion euros in 2018. Global T&E was 450 million euros in 2018.

A third of Daimler's U.S.-booked air spend in 2018 was for domestic travel, and almost half of U.S.-booked air tickets went through approved online tools. For airfare, the company negotiates only on long-haul routes, and HRS handles hotel sourcing. Those 2017 changes are part of the company's proprietary FiveStar travel program, which simplifies research, booking and expense to three traveler steps and rolls out globally starting this year. It's live in the U.S., Canada and the company's headquarters in Stuttgart, Germany. As such, the auto manufacturer aims to negotiate a uniform and simple agency fee system worldwide—it's consolidated globally with BCD Travel—and uniform service-level agreements for all supplier types. Daimler travel policy now allows Airbnb and Uber. For other considerations, the company, which employed 298,000 globally as of the end of 2018, has transitioned from a single global policy to country-specific policies.

The company is beefing up with investments in technology. Daimler Trucks and Buses has agreed to buy a majority stake in Torc Robotics to advance automated trucks. Torc will continue its work in its Blacksburg, Va., facility on the Asimov self-driving and testing software. Daimler also has agreed to a 50/50 joint venture with Chinese automotive peer Geely Holding, which also owns Volvo, to build a new generation of Smart electric cars for urban settings in China and begin sales in 2022. The JV is expected to be formed by the end of the year, and the two companies also plan to collaborate on a premium ridehailing service in China. Meanwhile, the company plans to open a second R&D center and a second plant in Beijing.

Until 2022, Daimler will continue to build Smart EQ Fortwo cars in Hambach, France, and Smart EQ Forfour cars in Novo Mesto, Slovenia. Meanwhile, the Hambach plant will get a 500 million-euro investment and work on a Mercedes-Benz compact electric vehicle under the new EQ brand. Daimler also has teamed up with BMW to work on automated driving and parking technology while separately pairing up to invest \$1 billion in car sharing, ridehailing, parking, vehicle charging and multi-modal transport technologies.

## 91 PUBLICIS GROUPE PARIS

**2018 U.S.-Booked Air Volume:** \$50 million

Net revenue for advertising and PR company Publicis Groupe declined 3.9 percent to 9 billion euros in 2018, compared to a year prior. The company acquired 17 companies in 2018, French data marketing company Soft Computing in February 2019, data marketing giant Epsilon in July for around \$4 billion and marketing agency Rauxa in August. In January of this year, it sold Publicis Health Solutions, and it's negotiating the sale of Proximedia. As

of September 2019, Publicis operated in more than 100 countries and employed 84,000 people, compared with 77,767 employees at year-end 2017.

## 91 SAMSUNG SEOUL, SOUTH KOREA

**2018 U.S.-Booked Air Volume:** \$50 million

Samsung trimmed its corporate travel spend 5 percent in 2018 from 2017, according to a BTN estimate. The electronics firm, which has an accredited Corporate Travel Department, last year was implementing corporate booking tools and boost compliance. Samsung's sales rose 2 percent in 2018 to \$218.2 billion, based on currency conversion as of Dec. 31, 2018.

## 91 UPS ATLANTA

**2018 U.S.-Booked Air Volume:** \$50 million

After a one-year absence, ubiquitous delivery service UPS makes its return to the BTN 100 for 2018, according to a BTN estimate. That's a \$2 million drop-off from the \$52 million the company spent on U.S.-booked air spend in 2016. Continued growth in demand for home deliveries, stemming from e-commerce, has driven steady revenue gains for UPS, which earned \$71.9 billion in revenue in 2018, about \$5.3 billion more than in 2017. The company employed more than 481,000 employees as of year-end 2018, some 399,000 of which were based in the U.S.

## 94 EMERSON ST. LOUIS

**2018 U.S.-Booked Air Volume:** \$49 million

Emerson's U.S.-booked air volume was \$49 million in 2018, BTN estimates. Last year, the automation, commercial and residential technology provider closed its acquisitions of Aventics, a Germany-based manufacturer, and Tools & Test, a Rockford, Ill.-headquartered manufacturer. According to its 2018 annual report, Emerson's sales in the U.S./Canada, Europe, Asia, Latin America and Middle East/Africa regions have grown by double digit percentages. Around 76,500 people work at the company.

## 94 ITW GLENVIEW, ILL.

**2018 U.S.-Booked Air Volume:** \$49 million

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

ITW's U.S.-booked air volume dipped \$2 million in 2018 from 2017's \$51 million. The company reduced global T&E 5 percent by reducing trips and issuing guidance on traveling smarter. Travelers' use of corporate cards also rose to 94 percent of all eligible spend, increasing the company's visibility. ITW continues to espouse direct booking, capturing itinerary data through SAP Concur TripLink. ITW also refreshed its single, global travel policy last year.

## 96 DANAHER WASHINGTON, D.C.

**2018 U.S.-Booked Air Volume:** \$48 million

Science and technology firm Danaher's business units range from environmental and applied solutions and life sciences to diagnostics and dental. The company earned \$2.7 billion in 2018, up 7 percent from 2017. Meanwhile, according to a BTN estimate, U.S.-booked air volume slid in 2018 from 2017's \$52 million. The decrease occurred despite growth from 67,000 employees in 2017 to more than 71,000. The company also closed acquisitions totaling \$2.2 billion in 2018, including biotech firm Integrated DNA Technologies and software management company Blue Software. It also spun off its dental operations into a publicly traded company called DentalCo.

## 97 BOSTON SCIENTIFIC MARLBOROUGH, MASS.

**2018 U.S.-Booked Air Volume:** \$47.8 million

**2018 Global Air Volume:** \$84.2 million

**2018 U.S. T&E:** \$162 million

**2018 Global T&E:** \$258.8 million

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

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

**Primary Car Rental Supplier:** Hertz

**Primary Global Online Booking Tool:** Concur

**Primary U.S. Payment Supplier:** Citi

**Card Program:** individual bill, central pay

**Primary Global Expense Supplier:** Concur

**Primary Global Travel Risk Management Supplier:** Anvil

**Consolidated Global TMC:** Amex GBT

Medical device manufacturer Boston Scientific earned \$9.8 billion in revenue in 2018 and is spending less on corporate travel thanks to new contracts that leverage competition in legacy markets. U.S.-booked air spend fell 5.5 percent in 2018 from 2017's \$50.6 million and is projected to jump to \$64.2 million this year. Thirty-eight percent of 2018 U.S.-booked volume was for crossborder flights. The company has a single, global travel policy. Seventy-nine percent of U.S.-booked air tickets went through approved online tools, and 59 percent of those required no agent assistance. Boston Scientific acquired several companies in 2018, and the workforce has grown to more than 35,000. The travel program emphasizes data mining and understanding traveler behavior to optimize the program.

## 98 ASTRAZENECA CAMBRIDGE, ENGLAND

**2018 U.S.-Booked Air Volume:** \$47 million

**Consolidated Global TMC:** BCD

Global pharmaceutical and biopharmaceutical company AstraZeneca finished 2018 strong, CEO Pascal Soriot telling investors the company had "returned to growth" with a 4 percent increase in product sales for the year to \$21 billion. Revenue totaled \$22 billion. The company closed two facilities in Colorado, which could curtail domestic travel. On the other hand, U.S. product sales rose 11 percent, while sales to China increased 28 percent, which could translate into increased Asia/Pacific travel. The company, which has

more than 60,000 employees worldwide, spent the latter half of this decade bringing its global corporate travel program under BCD Travel, including consolidating policies and programs in more than 75 countries.

## 98 BAE SYSTEMS ARLINGTON, VA.

**2018 U.S.-Booked Air Volume:** \$47 million

**2018 U.S. T&E:** \$117 million

**Primary U.S. Air Suppliers:** Delta, American, United

**Primary U.S. Hotel Suppliers:** Marriott, Hilton, InterContinental

**Primary U.S. Car Rental Suppliers:** Avis Budget Group,

Enterprise/National

**Primary U.S. Online Booking Tool:** Concur

**Primary U.S. Payment Supplier:** American Express

**Card Program:** individual bill/central pay

**Primary U.S. Expense Supplier:** Concur

**Primary U.S. Travel Risk Management Supplier:**

International SOS

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

Last year, BAE Systems added travel dashboard metrics that compare key spend and compliance areas by sector and it updated key performance indicators to focus on savings and to create more actionable data for following up with travelers. It also limited business class airfare use to international flights of six hours or more. BAE has a single U.S. travel policy. This year, it aims to improve the travel process for job applicants and to source meetings more strategically. BAE Systems also is rolling out information that can be posted on each sector's intranet page, touching on such topics as hotel cost savings initiatives, agency process changes, the meetings sourcing program, booking channel compliance and use of preferred hotels. The company's U.S.-booked air volume rose 9.3 percent in 2018 from 2017's \$43 million, and it expects spend to remain flat this year. Of its 2018 U.S.-booked air spend, 55 percent was for domestic travel. The company's 2018 revenue totaled \$10 billion.

## 100 AT&T DALLAS

**2018 U.S.-Booked Air Volume:** \$46 million

Telecommunications giant AT&T returns to the CT 100 after a several-year absence, based on a BTN estimate of its 2018 U.S.-booked air spend. It did so not yet accounting for the \$85 billion June 2018 acquisition of Time Warner. That transaction closed nearly two years after the deal was announced and after a lengthy legal fight with the U.S. Department of Justice. Time Warner subsequently was renamed WarnerMedia and now is a wholly owned subsidiary of AT&T. Excluding WarnerMedia, AT&T accounted for 92,500 metric tons of carbon dioxide equivalent emissions due to business travel in 2018, down a bit more than 1 percent from the year before. The figure encompasses AT&T's air travel and rental car use except the use of on-demand ground transportation options. AT&T itself is a supplier of remote collaboration and teleconference equipment and collaborates with Cisco's Webex conferencing business. AT&T recorded \$170.8 billion in total operating revenue in 2018, including WarnerMedia revenue after the acquisition, up from \$160.5 billion the year before. Operating income decreased in 2018 to \$19.4 billion from \$29.5 billion in 2017. The company had more than 268,000 employees at the end of 2018, up from 254,000 one year prior.

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