\$11.4 BILLION DOLLARS: AMOUNT *BTN'S* CT 100 SPENT ON AIRLINE TICKETS BOOKED IN THE UNITED STATES IN 2014



2015 CORPORATE TRAVEL 100

A WINDOW INTO THE BIGGEST CORPORATE TRAVEL SPENDERS IN THE UNITED STATES

Surging: Aon, Amazon.com, Church of Jesus Christ of Latter-day Saints, Coca-Cola, Koch Industries

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Healthy Spend Continues For CT 100

he 28th annual *Business* Travel News Corporate Travel 100 saw significant adjustments in the rankings in 2014. Movements generally reflected the health of respective industries: Online retailer Amazon.com, for example, jumped to No. 36 based on 2014 spend, compared to last year's home at No. 72. The Church of Latterday Saints was among the strongest movers, surging to No. 48 on BTN's list, after barely making the cut at No. 99 last year, based on 2013 volume.

On the flip side, energy companies introduced unfamiliar spend restrictions, dropping

Corporate Travel 100 U.S. Accounts, By Agency

Agency	CT100 U.S. Accounts
American Express	37
BCD Travel	23
Carlson Wagonlit Travel	20
HRG	6
Other*	5
No single primary agency	9

^{*} Includes one client account each for ATG, The Boeing Co. Corporate Travel Department, Egencia, Travel and Transport and Tbiz

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

This year's CT 100 floor of \$47.5 million in 2014 United States-booked air spending is a half-million more than the floor in last year's edition.

London-based BP 20 rungs on the ladder and Paris-based Schlumberger 22 spots.

On the whole, 2014 travel spend was healthy, though, and many companies, even those with reduced spend in 2014, reported to *BTN* that 2015 had seen significant travel increases to date.

Companies paid increased attention to the traveler experience, particularly in terms of disruption management, safety-and-security initiatives, mobile travel apps and a focus on traveler well-being.

Methodology

The CT 100 is based on 2014 air tickets purchased for domestic or international business travel at all U.S. points of sale. Most organizations listed provided at least some information for use in their specific listings.

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

In their online questionnaires, respondents were asked to list their organization's highest-volume suppliers and other preferred suppliers in the United States and in other regions; their responses are included alphabetically and by supplier category in the listings as "principal suppliers."

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Dear Travel Management Professional,

In business, the one true constant is change. Our target markets stretch around the globe and technology is ever-changing the way we do business. While we strive to keep up with the pace, the shared goals remain the same – finding the optimum way to reduce costs while keeping our travelers safe and happy. No small feat by any measure.

At HRS, we understand the challenges corporations face regarding their hotel needs. It truly is a balancing act. Business travelers expect a wide range of hotels at the right locations and at the right rate. Outside of the U.S. especially, fragmented independent hotel markets and many different booking channels can make this a challenging task for the corporate travel leader. A corporation's focus is to provide an expanded hotel portfolio within policy, as well as an exceptional booking experience for their travelers, in order to reduce leakage and maintain best-inclass duty of care.

We invite you to rise to this challenge with HRS as your partner. As the Global Hotel Solutions provider, HRS offers innovative solutions spanning the entire corporate hotel procurement cycle. It is your travelers that matter and your measurable results that count.

We deliver unparalleled benchmark data and local market know-how to help you optimize your hotel program. Especially in fragmented hotel markets outside the U.S. we have the hotel content you need. Don't just take our word for it – ask one of our 40,000 corporate customers about the difference HRS can make for you.

We are very pleased to be sponsors of this year's *Business Travel News*' Corporate Travel 100 issue and we want to use this opportunity to thank you for your continued trust and partnership. Let us jointly continue to take global hotel management to the next level.

Sincerely,

5. nunfang

Suzanne Neufang Vice President Americas HRS – Global Hotel Solutions



Sheraton[®]



Dear Travel Partner,

More than ever, travel remains integral to our customers' business, with markets around the world showing exceptional strength and momentum. That's why Starwood is committed to delivering the innovation, service, and global reach that helps customers drive their business, globally.

This past year we launched powerful new offerings, including SPG Pro and SPG Business, we aligned segmentation efforts to better map to how and where customers do business, and we introduced digital innovations like SPG Keyless and SPG Preferences. We're also growing at an unprecedented rate, with nearly 500 hotels in our pipeline representing 110,000 rooms in established and growing markets. That growth is further propelled by the investments we're making in our brands and properties, including this year's launch of Sheraton 2020.

Sheraton is Starwood's largest and most global brand, with a nearly 80-year history as a leader and trusted voice in travel. Designed to put Sheraton firmly back into that global spotlight, Sheraton 2020 is a comprehensive plan that includes a \$100 million marketing campaign, the launch of the premier tier, Sheraton Grand, design innovations, a more consistent guest experience, and a goal of opening more than 150 new Sheraton hotels worldwide by 2020.

Elements of the plan are already underway, including a new website and the launch of our new global marketing campaign in early September. The brand is also focused on creating more engaging F&B programming, beginning with Sheraton "Paired," which is central to reinvigorating the lobby bar experience. Paired builds on the equity Sheraton has in wine with the addition of local craft beers and unique food pairings. Read more about the plan in our Corporate Profile on Page 45.

As we explore new opportunities to grow together and enhance our offerings, Starwood will continue to connect with customers early and often to better understand their evolving preferences and business outlook. That dialog guides our strategies, makes Starwood a more valuable partner, and ultimately helps us shape the next generation of travel.

This is an exciting time to be part of our industry, and as the market continues to evolve, *Business Travel News* remains an essential resource for us all. Starwood is proud to sponsor this year's Corporate Travel 100 issue, and we thank all of our customers and guests for your continued business and partnership.

Acie Harrington Canal Dio

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





Dear Travel Colleagues,

The CT100 edition is a valuable resource that not only helps us better understand our customers, it is also a tool that we can use to ensure we offer the products and services that matter most to business travelers.

We understand that corporate travel managers must balance the needs of their business travelers while adhering to their companies' bottom lines. To help our corporate travel partners do business more easily and efficiently, United is focused on delivering the right products, services, resources and reporting tools:

- Making business easier by enabling and empowering you
 We are developing a new corporate and agency website built with
 you in mind. The site combines powerful self-service reporting
 and transactional tools that make it easier than ever to get the
 information and services you need.
- Building a rewarding, productive relationship
 Our Sales team is dedicated to being the industry's most visible
 and accessible Sales force. We know it's important to spend
 quality time together, so we can understand and serve your
 unique business needs.
- Focusing on reliability to get you where you need to be safely and on time

Our controllable completion and on-time departure rates in business markets like New York City, Chicago, Houston and San Francisco are all trending in a positive direction. We are seeing best-in-class completion percentages – beating many of our largest competitors.

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We are thrilled to announce that we have completed Wi-Fi installation on most mainline and large regional aircraft and are making in-seat power available throughout our mainline fleet.

These are just some of the ways we are building our business around you.

On behalf of United Sales teams around the world, thank you for choosing United. We know you have a choice when it comes to airline partners, and we appreciate your business and continued support.

Dave Hilfman Senior Vice President, Worldwide Sales United Airlines

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Corporate Travel 100 At A Glance

RANKED BY 2014 LINITED STATES-ROOKED AIR VOLUME

RAN	KED BY 2014 UNITED STATES-BOO	KED AIK VO
1	IBM	\$570M
2	Deloitte	\$445.8M
3	General Electric	\$350M
3	Oracle	\$350M
5	The Boeing Co.	\$306.9M
6	PricewaterhouseCoopers	\$277M
7	EY	\$273.7M
8	Accenture	\$249M
9	ExxonMobil	\$235M
10	Lockheed Martin	\$232.3M
11	McKinsey	\$216M
12	Apple	\$210M
13	Wells Fargo	\$205M
14	Microsoft	\$201M
15	Bank of America	\$185M
16	JPMorgan Chase	\$183M
17	Royal Dutch Shell	\$176M
18	Johnson & Johnson	\$175.8M
19	World Bank Group	\$173.6W
20	KPMG LLP	\$172.2W
21	Hewlett-Packard	\$170W
22	Roche	\$148.5M
23	Siemens	\$146.5W
24	The Walt Disney Co.	\$136M
25	Raytheon	\$134M
26	Chevron	\$127M
27	Cisco Systems	\$127W
28	Google	\$129M
29	United Technologies Corp.	\$115M
30	Northrop Grumman	\$114.3M
31	Goldman Sachs	\$113M
32	Citigroup	\$110M
33	Novartis	\$104.8M
34	SAP	\$104.0W
35	PepsiCo	\$100M
36	General Motors	\$96M
37	Amazon.com	\$95M
38	Medtronic	\$94.6M
39	Aon	\$94.0M
40	Nike	\$92.8M
41	Comcast	\$90M
42	FedEx	\$88M
43	Honeywell	\$85M
43	Procter & Gamble	\$85M
43	Time Warner Inc.	\$85M
	EMC	******
46	Pfizer	\$81.8M
47		\$81.5M
48	Church of Jesus Christ	\$80M
48	Church of Jesus Christ of Latter-day Saints	\$80M
50	The Boston Consulting Group	\$77M

E		
51	AbbVie	\$75M
51	General Dynamics	\$75M
51	Merck	\$75M
54	Danaher	\$74M
54	International Monetary Fund	\$74M
54	UBS	\$74M
57	The Coca-Cola Co.	\$72M
58	Koch Industries	\$71M
59	Alcatel-Lucent	\$70M
59	American International Group	\$70M
59	Sanofi	\$70M
62	ВР	\$69.8M
63	L-3 Communications	\$68.5M
64	Wal-Mart Stores	\$68M
64	WPP	\$68M
66	Deutsche Bank	\$67.9M
67	Marsh & McLennan	\$66M
67	Morgan Stanley	\$66M
69	Bayer	\$64.3M
70	Abbott Laboratories	\$63M
70	Eli Lilly	\$63M
70	Omnicom Group	\$63M
73	BASF	\$62M
73	UnitedHealth Group	\$62M
75	Johnson Controls	\$60M
75	Caterpillar	\$60M
75	Stryker	\$60M
78	Fidelity Investments	\$59M
79	Schlumberger	\$58M
79	Thomson Reuters	\$58M
79	Verizon Communications	\$58M
82	Ford Motor	\$57.8M
83	Barclays	\$57M
83	eBay	\$57M
83	Interpublic Group	\$57M
86	Toyota Motor Sales U.S.A.	\$56.3M
87	21st Century Fox	\$55M
87	Credit Suisse	\$55M
89	Philips	\$54M
90	Intel	\$53.5M
91	Publicis Groupe	\$53.1M
92	Illinois Tool Works	\$53M
93	Emerson Electric	\$52M
94	3M	\$51.5M
94	McKesson	\$51.5M
96	Amgen	\$51.2M
97	Boston Scientific	\$50.3M
98	Allstate Insurance Co.	\$50M
99	Cargill	\$47.5M

ALPHABETIZED WITH RANKING

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United Technologies Corp.	29	
UnitedHealth Group	73	
Verizon Communications		
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Wells Fargo		
World Bank Group	19	
WPP	64	

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1 IBM

ARMONK, N.Y.

2014 United States-Booked Air Volume: \$570 million

Principal Air Suppliers: American, Delta
Principal Hotel Suppliers: Hilton, Marriott
Principal Car Rental Suppliers: Avis, Hertz
Principal Online Booking Tool: Orbitz for Business

Principal Card Supplier: American Express

Consolidated Global TMC: American Express Global Business Travel

BTN estimates IBM's 2014 United States-booked air volume decreased by almost 4 percent from the prior year, owing to divestitures. Even so, the technology and consulting heavyweight maintained its position as the largest corporate buyer of United States-booked air travel since *BTN* began tracking the Corporate Travel 100.

IBM experienced a 7 percent year-over-year reduction in the company's full-year revenue from \$99.8 billion in 2013 to \$92.8 billion in 2014, following a 5 percent year-over-year decrease from the previous year.

At the same time, IBM reduced employee headcount last year to 379,592 employees, down 12 percent from a year earlier, when the company had posted its first decline in a decade. Excluding a 35,000 reduction from divestitures, headcount fell about 3.9 percent in the previous year. This is the first two-year decline in IBM's workforce since the company verged on bankruptcy in 1993 and 1994. The company appears ready to lay off another 8,000 to 9,000 employees in 2015 as indicated by fourth-quarter earnings charges totaling \$600 million for "workforce rebalancing." Despite the cuts, nearly 300,000 employees still have travel profiles.

In the spring of 2014, IBM signed an agreement to use the Orbitz for Business booking tool through 2020. That tool already has been deployed in 34 countries and is on track to rolled out to nearly 60 countries by year-end. IBM plans to complete the rollout to more than 90 countries, depending on how the company's business mix changes with acquisitions and divestitures, in 2016.

IBM had used Travelport's Traversa tool for online booking for several years, but Orbitz also had provided account management and technology support to IBM as part of that arrangement.

The company's travel procurement team has been advancing the company strategy of being global, local, social and mobile into the travel marketplace and providing such tools to its travelers through a refreshed travel program.

In conjunction with consolidated global travel management company American Express, IBM's security, human resources and travel procurement teams fully deployed a duty-of-care program through which it can locate and communicate with travelers.

If necessary, travelers can use their mobile devices to connect with International SOS, iJet or the TMC. Internally, the company has raised traveler use of mobile devices to plan, book and manage itineraries.

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

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

guidelines with prenegotiated rates.

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

IBM makes transient and group reservations through its travel agency, which fulfills online reservations on the ground globally and provides consolidated reporting.

IBM provides a global travel portal that contains all policies, rules and guidelines, U.S. per diem rates, security alerts and links for making online airline, hotel and car rental reservations.

2 DELOITTE

NEWYORK CITY

2014 United States-Booked Air Volume: \$445.8 million

2014 U.S. T&E: \$1.1 billion 2014 Global T&E: \$1.2 billion

Principal Air Suppliers: American, Delta, United

Principal Hotel Suppliers: Hilton, Marriott, Starwood

Principal Car Rental Suppliers: Avis, Budget

Principal Online Booking Tool: Sabre Get There

Consolidated U.S. TMC: BCD Travel

Deloitte U.S. firms in 2014 used proactive demand management to drive compliance. Particular areas of focus included capturing reservations through managed channels; ensuring travelers use preferred suppliers across its air, hotel and ground transportation categories, as well as the preferred payment method; and placing a high priority on risk management across the entire travel program. The professional services firm switched its booking from Orbitz for Business to Sabre's GetThere tool during December 2014.

Deloitte's United States-booked air volume increased about 10 percent in 2014, while its total U.S. T&E spending grew 10 percent. Domestic U.S. travel accounts for 73 percent of the firm's total United States-booked air spend. The firm's 2015 U.S. air volume is expected to rise another 10 percent.

This year, Deloitte is looking to drive operational efficiencies for the travel reservation process and to improve online adoption. The primary goal of the travel program is to build a best-in-class traveler experience for its 70,000 business travelers with the aid of new mobile booking and itinerary management tools and to strengthen risk management through simulations and automation.

The firm maintained its existing travel policy during 2014 and expects to do the same again this year, though travel policy varies by global region. It continues to use BCD Travel as its consolidated U.S. agency, while Carlson Wagonlit Travel provides services in India and American Express GBT handles bookings in Mexico.

American Express serves as Deloitte's corporate card supplier, and the firm uses its own internal expense reporting system customized through SAP.



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DELTA.COM/EDGE





3 GENERAL ELECTRIC

FAIRFIELD, CONN.

2014 United States-Booked Air Volume: \$350 million

2014 Global Air Volume: \$600 million

2014 U.S. T&E: \$900 million

Principal Air Suppliers: American, Delta, United

Principal Hotel Suppliers: Hilton, InterContinental, Marriott

Principal Car Rental Supplier: Hertz

Principal Online Booking Tool: Sabre GetThere
Principal Expense Supplier: Concur Expense
Principal Card Supplier: American Express
Consolidated Global TMC: Carlson Wagonlit Travel

General Electric shifted several of its businesses in 2014. It began the spinoff of its retail finance business Synchrony Financial and plans to fully divest its remaining 85 percent ownership by the end of 2015 in exchange for 8 percent of GE's shares outstanding, according to its annual report.

GE also sold GE Money—its consumer finance business in Sweden, Denmark and Norway—to Santander for \$2.3 billion. It signed agreements to sell GE's Hungarian consumer finance business Budapest Bank, its signaling and appliances business. Additionally, GE signed agreements to acquire several businesses, including Alstom's thermal, renewables and grid businesses, API Healthcare and life science business Thermo Fisher Scientific.

GE reported \$148.6 billion in revenue and 305,000 employees for 2014. *BTN* estimates GE's 2014 United States-booked air volume increased to \$350 million in 2014, up from *BTN's* 2013 estimate of \$330 million.

Carlson Wagonlit Travel handled about 90 percent of GE's United Statesbooked air volume in 2014, but GE used HRG outside of the United States.

Last year, GE implemented an online dashboard reporting tool allowing businesses to evaluate traveler behavior and spend.

3 ORACLE

REDWOOD SHORES, CALIF.

2014 United States-Booked Air Volume: \$350 million

Principal Air Suppliers: American, British Airways, Delta, Emirates,

Southwest, Tam, United

Principal Hotel Suppliers: Hilton, InterContinental, Marriott, Starwood

Principal Car Rental Suppliers: Avis, Hertz
Principal Online Booking Tool: Sabre GetThere
Principal Expense Supplier: Oracle iExpense
Principal Card Supplier: American Express
Consolidated Global TMC: Carlson Wagonlit Travel

Business software and services provider Oracle in 2014 integrated several companies it had acquired, including tech firms BigMachines and Responsys, into its managed travel program. Oracle's 2014 United Statesbooked air volume increased from 2013 levels.

The company conducted a global survey of its corporate travelers last year to gain feedback on its travel program. Additionally, Oracle continued to implement Sabre's GetThere booking tool and other automated processes throughout the world.

This year, Oracle planned its first foray into dynamically priced hotel agreements for certain brands. The company also planned to improve traveler compliance to its lowest-logical-airfare policies and planned to embark upon a data-consolidation project. On May 31, 2015, Oracle had 132,365 employees, about 10,000 more than a year prior.

5 THE BOEING CO.

CHICAGO

2014 United States-Booked Air Volume: \$306.9 million

2014 Global T&E: \$671 million

Principal Hotel Suppliers: Hilton, Hyatt, Marriott
Principal Car Rental Suppliers: Avis, Budget
Principal Online Booking Tool: Concur Travel
Principal Expense Supplier: Concur Expense
Principal Card Supplier: Citi Visa

During 2014, Boeing progressed on several travel management initiatives, including implementing a new global Voiceover Internet Protocol phone and email workflow tool, expanding international and local service for Boeing joint ventures and subsidiaries and selecting a global support services provider.

For 2015, the company hopes to complete the implementation of its global support services provider, expand its use of data analytics to evaluate cost-savings opportunities and recompete its credit card services.

The company's 2014 United States-booked and companywide air volumes were down 3.6 percent from the previous year, and that figure is expected to remain largely unchanged this year. Companywide T&E decreased by \$7 million from the previous year.

Last year, the company altered its travel policy to clarify the guidelines for personal corporate card use. It also removed references to delayed baggage from its expensing policy, allowing managers to have individual approval for such expenses, and clarified language around lost-baggage reimbursement.

In 2015, the company is building on these changes for its 90,000 travelers by clarifying business meetings spend policy and by limiting the number of managers who can sponsor travel.

Accounting for 81 percent of total air transaction volume, U.S. travel is serviced by Boeing's Airlines Reporting Corp.-accredited Corporate Travel Department, which also manages all bookings made outside the United States. Boeing continues to use Concur for both online booking and expense management automation, both inside and outside the United States. Within the United States, 93 percent of air bookings went through Concur, and 67 percent of those required no agent assistance.

In 2014, Boeing reported \$90.8 billion in global revenue, up almost 5 percent year over year.

6 PRICEWATERHOUSECOOPERS

NEWYORK CITY

2014 United States-Booked Air Volume: \$277 million

2014 Global Air Volume: \$444 million

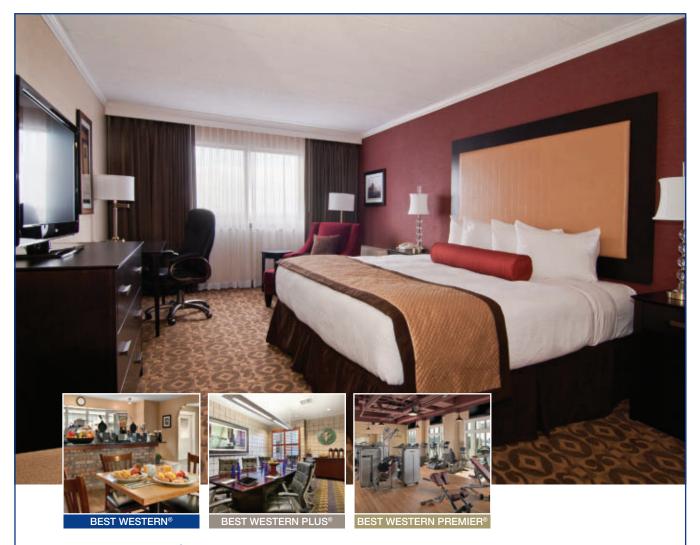
2014 U.S. T&E: \$800 million

2014 Global T&E: \$853 million

Professional services firm PricewaterhouseCoopers moved ahead on several travel management initiatives last year, including capturing more in-depth, qualitative feedback from its travelers through expanded customer surveys and through focus groups.

The travel program enjoyed a great deal of success with its travel site, launched in the latter half of 2013 on the company's internal social media platform. The site was and is among the top three most trafficked sites within the PwC global network, and its success has allowed the firm's travelers to self-educate through peer interaction and has allowed the travel program to identify power users.





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The firm increased utilization of expiring nonrefundable tickets to cut back on overall losses and developed an instant messaging channel with its travel management company. This year, PwC is focused on cost management and finding greater synergy and leverage between meetings and travel. The program is exploring a more holistic approach to sourcing, examining price versus traveler experience, and challenging suppliers to focus on experience.

PwC employed approximately 38,000 business travelers in 2014, and that number currently rests at about 40,000.

7 EY

LONDON

Fiscal Year 2015 United States-Booked Air Volume: \$273.7 million

Fiscal Year 2015 Global Air Volume: \$602.3 million Fiscal Year 2015 U.S. T&E: \$818.3 million

Fiscal Year 2015 Global T&E: \$1.9 billion

Principal Air Suppliers: American, Delta, United

Principal Hotel Suppliers: Hilton, Marriott, Starwood
Principal Car Rental Suppliers: Enterprise, Hertz, National

Principal Online Booking Tool: Sabre GetThere
Principal Card Supplier: American Express

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

Accounting and professional services organization EY increased its United States-booked air volume by \$18 million in its 2015 fiscal year, which ended June 30, 2015. The organization expects its air volume to increase another \$13.5 million next year.

During 2014, the organization worked to put online booking tools into practice in more countries. It implemented mobile apps across its global regions: with Sabre TripCase in the United States, CWT To Go in Latin America and the Asia/Pacific region and HRG Mobile in Europe, the Middle East and India. It renegotiated its contract with American Express Global Business Travel and re-implemented the travel management company in the United States and Canada. It also introduced global pricing desks for air and regional desks for hotel, as well as automated approval processes and out-of-policy escalations in the Asia/Pacific region, Europe, the Middle East, India, Africa and Latin America.

This year, the travel program aims to finalize the implementation of its TMC in Central America, roll out its online booking tool in eight additional countries and emphasize advanced booking of flights. It is adding an approval process for international travel in the United States and engaging with its TMC to maximize the use of telepresence technology as a trip alternative.

EY maintained its travel policy, which varies by global region, for its 100,000 business travelers in 2014.

While American Express GBT continues to serve as EY's consolidated U.S. agency and Canada, Carlson Wagonlit Travel services travelers in the Asia/Pacific region and Latin America, and HRG handles Europe, the Middle East, India and Africa.

It utilizes Sabre's Get'There as its U.S. online booking system, and Amadeus e-Travel Management elsewhere, with local systems in China and Brazil. Within the United States, 80 percent of tickets went through Get'There, 81 percent of which required no agent assistance.

American Express supplies corporate cards to EY's U.S. travelers under an individual bill, individual pay model. The organization uses its own custom internal software for expense reporting.

EY's greatest travel management challenges are mitigating cost increases as headcount grows and engaging with younger travelers and their technology expectations.

8 ACCENTURE

DUBLIN

2014 United States-Booked Air Volume: \$249 million

2014 Global Air Volume: \$536 million

2014 U.S. T&E: \$434 million

2014 Global T&E: \$889 million

Principal Air Suppliers: American, Delta, United

Principal Hotel Suppliers: Hilton, InterContinental, Marriott, Starwood

Principal Car Rental Suppliers: Avis, Hertz
Principal Online Booking Tool: Sabre GetThere
Principal Card Supplier: American Express
Consolidated Global TMC: Carlson Wagonlit Travel

Consulting firm Accenture modestly increased its United States-booked air volume by 2.5 percent during 2014 but decreased its companywide air volume by about 5.5 percent. The company also managed to cut its U.S. T&E by 31 percent and its companywide T&E by 36.5 percent.

Last year, Accenture moved ahead with a number of travel management initiatives, including implementation of international trip controls for North America, broadening of client team travel reporting, expansion of its social network presence and introduction of its Smart Traveler recognition program. The travel program also managed hotel costs by introducing market-specific rate caps globally.

For the current year, the company continues to focus on program innovation, cost-reduction measures and enhancement of its expense management process and tools. It is looking to increase adoption of preferred mobile travel applications.

Carlson Wagonlit Travel is Accenture's consolidated global agency, serving 95,000 travelers. Sabre's GetThere continues to serve as the company's self-booking tool inside and outside the United States. Ninety-four percent of its U.S. bookings were made using the tool, and 87 percent of those required no agent assistance.

Accenture continues to use American Express for its U.S. corporate card program and its own internal tool for expense reporting, both inside and outside the United States.

9 EXXONMOBIL

IRVING, TEXAS

2014 United States-Booked Air Volume: \$235 million Consolidated U.S. TMC: Carlson Wagonlit Travel

Amid year-over-year declines in operating revenue and selling, general and administrative expenses, *BTN* estimates that oil and gas giant ExxonMobil, one of the largest publicly traded companies in the world, reduced its United States-booked air spending in 2014.

Exxon Mobil's 2014 sales and operating revenue dipped from \$420.1 billion in 2013 to \$394.1 billion in 2014. Its selling, general and administrative expenses category, which includes business travel spending, dropped to \$12.6 billion from \$12.9 billion the year prior.

The company employed about 75,300 people worldwide at the end of 2014, up from 75,000 one year earlier.

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10 LOCKHEED MARTIN

BETHESDA, MD.

2014 United States-Booked Air Volume: \$232.3 million

2014 Global Air Volume: \$240.5 million

2014 U.S. T&E: \$519.8 million 2014 Global T&E: \$540 million

Principal Air Suppliers: American, Delta, United Principal Hotel Suppliers: Hilton, Hyatt, Marriott Principal Car Rental Supplier: Avis Budget Group Principal Online Booking Tool: Sabre GetThere

Principal Expense Suppliers: IBM Global Expense Reporting Solutions,

Concur Expense

Consolidated Global TMC: BCD Travel

Lockheed Martin further globalized the scope of its travel program in 2014. The aerospace and defense contractor consolidated travel services in the Middle East and identified global management information system reporting requirements. Beyond the travel program, the company opened a global emergency operations center that will monitor natural and manmade threats and offer crisis communications and traveler- and asset risk-management services.

Lockheed's 2014 United States-booked air volume increased less than 3 percent. About 54 percent of that total volume was booked for U.S. travel. Lockheed's 40,000 business travelers carry US Bank Visa corporate cards under an individual bill, individual pay configuration. The company used IBM's Global Expense Reporting Solutions for expense reporting in the United States in 2014, a product IBM plans to retire in 2016. Outside the United States, Lockheed primarily uses Concur Expense.

The company plans to implement online booking and meetings management tools this year.

MCKINSEY

LONDON

2014 United States-Booked Air Volume: \$216 million

Consolidated Global TMC: American Express Global Business Travel

BTN estimates that privately held management consulting giant McKinsey increased its United States-booked air volume in 2014. The company employs about 19,000 people worldwide, an increase of about 1,000 from the year prior, and operates 107 offices in 61 countries. According to Forbes, McKinsey's annual sales revenue is about \$8 billion.

The company has operated a strategic meetings management program for many years and requires registration of events through a central online portal, which enables McKinsey to enforce meetings policies, including siteselection restrictions.

12 APPLE

CUPERTINO, CALIF.

2014 United States-Booked Air Volume: \$210 million Consolidated U.S. TMC: BCD Travel

BTN estimates that Apple had \$210 million in United States-booked air volume last year. Apple maintains its status as an Airlines Reporting Corp.-accredited Corporate Travel Department, while BCD Travel serves as its consolidated U.S. agency and also is used in other countries.

Apple's total sales for its fiscal year ending Sept. 27, 2014, rose almost 7 percent to \$182.8 billion from the prior fiscal year. Net income rose to \$39.5 billion from \$37 billion for the period. Selling, general and administrative expenses rose 11 percent to \$12 billion, driven by headcount additions, higher marketing and professional services spending and the company's expansion in retail. As of Sept. 27, 2014, Apple counted approximately 92,600 full-time-equivalent employees, up from 80,300 the year before.

13 WELLS FARGO

SAN FRANCISCO

2014 United States-Booked Air Volume: \$205 million Principal Air Suppliers: Delta, United, US Airways Principal Hotel Suppliers: Hilton, Marriott, Starwood Principal Car Rental Suppliers: Enterprise, Hertz, National

Principal Online Booking Tool: Concur Travel **Principal Expense Supplier:** Concur Expense

Consolidated Global TMC: HRG

Wells Fargo's 2014 United States-booked air volume increased 1.5 percent. That figure is expected to decrease this year as the company introduces cuts to its companywide T&E spend.

The financial services company in 2014 expanded its in-depth data reporting to all business units and lines of business across its enterprise. Part of this initiative was extending traveler dashboards to its business units. Those tools provided in-depth reporting and opportunities for travel avoidance through videoconferencing and telepresence. In 2015, the company hopes to drive higher compliance.

Wells Fargo's travel policy remained largely unchanged in 2014, but this year the company has already begun to implement pre-trip authorization for noncompliance and pre-trip approval requirements for international travel. Policy alterations in 2015 also call for a reduction in the approved meal cap and stronger enforcement for overspending.

Wells Fargo continues to use HRG as its consolidated global travel agency. Its 85,000 business travelers use Concur for online booking and expense reporting. Some 95 percent of bookings went through Concur last year, and 83 percent of those required no agent assistance. Visa and MasterCard supply corporate cards to Wells Fargo travelers.

14 MICROSOFT

REDMOND, WASH.

2014 United States-Booked Air Volume: \$201 million

2014 Global Air Volume: \$380 million

2014 U.S. T&E: \$400 million

2014 Global T&E: \$800 million

Principal Air Suppliers: Delta and others **Principal Online Booking Tool:** Concur Travel Principal Expense Supplier: MSExpense **Principal Card Supplier:** American Express

Consolidated Global TMC: American Express Global Business Travel

Microsoft grew its United States-booked air volume \$15 million in 2014 to \$201 million, 45 percent of that domestic and the rest international. It expects to outdo itself this year, rising to \$220 million. Globally, the company's travel program serves 70,000 business travelers.





Following Microsoft's \$7.2 billion acquisition of Nokia's smartphone and mobile phone business in 2014, the tech company merged 55 countries where Nokia had a presence into its global program, which operates under a single policy. Microsoft completed a global agency and online booking tool request for proposals. It also made VenueSource a mandatory procurement program for meetings and events in 10 markets.

In 2015, it has been reorganizing to create a leaner global decision-making model. Via its position as both developer and user of Outlook, which dominates corporate email and calendar systems, Microsoft is integrating travel itineraries into the software and piloting a process to allow travelers to book directly from the program. It's also expanding to 24 small Middle Eastern and African markets to improve employee tracking for security, as well as improving tracking tools for use in emergencies.

All that feeds into the company's biggest travel management challenge: Maintaining the productivity of employees as they book and travel. Of the airline tickets Microsoft travelers purchased in the United States in 2014, 95 percent of them went through approved online tools, and 90 percent of those required no agent assistance.

Inside the United States, travelers book on Concur, and elsewhere, they use Amadeus e-Travel. The company employs an individual bill, central pay card program.

15 BANK OF AMERICA

CHARLOTTE

2014 United States-Booked Air Volume: \$185 million Principal Online Booking Tool: Sabre GetThere

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

BTN estimates that Bank of America's 2014 United States-booked air volume declined slightly to \$185 million. Bank of America's revenue last year fell to \$85.1 billion from \$89.8 billion in 2013. Net income more than halved to \$4.8 billion from \$11.4 billion in 2013. The banking and financial services firm reported 224,000 full-time employees at the end of 2014, down from 242,000 at the close of the prior year.

Bank of America tracks greenhouse gas emissions from company business travel and reduced them from 216,220 metric tons in 2013 to 173,452 in 2014.

The company operates in all 50 U.S. states and has a presence in more than 35 countries.

16 JPMORGAN CHASE

NEW YORK CITY

2014 United States-Booked Air Volume: \$183 million Principal Air Suppliers: American, Delta, United Principal Hotel Suppliers: Hilton, Marriott, Starwood Principal Car Rental Suppliers: Avis, Enterprise, Hertz Principal Online Booking Tool: Sabre GetThere **Principal Expense Supplier:** Concur Expense Consolidated Global TMC: Carlson Wagonlit Travel

JPMorgan Chase has sought to reduce air travel over the past

few years via a significant investment in telecommunications and collaboration tools. As a result, BTN estimates its 2014 United States-booked air volume declined 9 percent year over year to \$183 million in 2014.

JPMorgan Chase's 2014 net income increased 21.4 percent to \$21.8 billion. Headcount declined from 251,196 in 2013 to 241,359

While Carlson Wagonlit Travel continues to act as the firm's consolidated global agency, JPMorgan Chase sold the 45 percent equity interest it indirectly held in the agency back to CWT in July 2014.

17 ROYAL DUTCH SHELL

THE HAGUE, NETHERLANDS

2014 United States-Booked Air Volume: \$176 million Consolidated U.S. TMC: Carlson Wagonlit Travel

BTN estimates that 2014 United States-booked air volume at oil and gas giant Royal Dutch Shell declined a bit from 2013 levels, along with company revenue, which fell on lower gas prices and slightly lower production.

Total Shell revenue in 2014 declined about 7 percent to \$421.1 billion, while earnings dropped about 11 percent to \$14.7 billion, though removing the effect of changes in the oil price on inventory valuation would result in a 13 percent yearover-year increase in revenue.

The greenhouse gases attributed to Shell's air travel increased in 2014 to 430,000 metric tons from 355,000 metric tons in 2013.

Shell has developed a business intelligence platform that analyzes travelers' booking behavior. The data is used to help persuade travelers and managers to book through designated channels and control travel costs.

At the end of 2014, the company had 94,000 employees, up from 92,000 a year earlier. In 2015, Shell announced the planned acquisition of British multinational oil and gas company BG Group for \$70 billion.

18 JOHNSON & JOHNSON

NEW BRUNSWICK, N.J.

2014 United States-Booked Air Volume: \$175.8 million

Consolidated Global TMC: American Express Global Business Travel Johnson and Johnson's 2014 United States-booked air volume rose 6.3 percent year over year.

Last year, the multinational medical devices, pharmaceutical and consumer goods manufacturer globally implemented the pre-trip tool furnished by American Express Global Business Travel. It also applied hotel rate caps globally where applicable.

The company's worldwide sales for 2014 increased 4.2 percent to \$74.3 billion.

Last year, the company acquired Alios BioPharma, a privately held biopharmaceutical company focused on viral disease therapy development for \$1.75 billion cash.

Globally, the company employs 125,500 people across its 265 subsidiaries located in 60 countries.



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19 WORLD BANK GROUP

WASHINGTON, D.C.

2014 United States-Booked Air Volume: \$172.2 million

2014 Global Air Volume: \$250 million 2014 Global T&E: \$433 million

Principal Air Suppliers: Delta/Air France JV, United/Lufthansa JV
Principal Hotel Suppliers: Hilton, InterContinental, Marriott, Starwood

Principal Online Booking Tool: Amadeus e-Travel Management

Principal Expense Supplier: SAP
Principal Card Supplier: BMO Diners Club

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

As part of an internal expense review, World Bank Group committed to saving \$400 million over the course of three years, expecting the majority of the savings to come from travel. The organization's 2014 companywide travel and entertainment spend decreased 12.6 percent from \$495.7 million. United States-booked air volume in 2014 was \$172.2 million, of which 99 percent was international.

To achieve such savings, World Bank group implemented several strategies, including eliminating certain trip types, reducing the number of travelers sent on particular trips and reducing the daily per-diem rate if the hotel price includes breakfast.

The World Bank Group has a single global policy and last year modified it to require booking economy class for all international flights less than five hours. The organization implemented the Amadeus e-Travel Management online booking tool in the United States. It also rolled out Trondent's ProFILER Express tool, a traveler-profile solution that can be used with all major global distribution systems, its agency and its online booking tool.

American Express Global Business Travel is World Bank Group's U.S. consolidated agency. In its East Asia/Pacific region, comprising 17 countries, World Bank Group uses BCD Travel as its consolidated agency. The organization is conducting a global travel management company request for proposals (including the EAP region) to consolidate travel in 60 countries.

So far this year, the group already has updated its pre-trip approval process, implemented HRS's online hotel booking portal for offices not managed by a TMC contract and negotiated new global airline contracts.

20 KPMG LLP

NEWYORK CITY

2014 United States-Booked Air Volume: \$170 million Principal Online Booking Tool: Sabre GetThere Principal Card: BMA Diners Club MasterCard

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

Consulting and accounting firm KPMG LLP's United Statesbooked air volume jumped from \$129 million in 2013 to \$170 million in 2014, 5 percent of that heading abroad.

In 2014, KPMG LLP, a U.S. member firm of the global KPMG entity, joined with other KPMG member firms to consolidate their air alliance contracts, and in 2015 it has emphasized self-service booking technology within a program that serves 20,000 travelers.

In 2014, 75 percent of the plane tickets bought in the United States went through approved online tools, and 65 percent of tickets bought online required no help from an agent.

21 HEWLETT-PACKARD

PALO ALTO, CALIF.

2014 United States-Booked Air Volume: \$158 million

2014 Global Air Volume: \$357 million

2014 Global T&E: \$1.2B

Principal Hotel Suppliers: Hilton, InterContinental

Principal Car Rental Supplier: Avis

Principal Online Booking Tool: Concur Travel
Principal Card Supplier: American Express
Consolidated Global TMC: Carlson Wagonlit Travel

Hewlett-Packard, the global information technology company that plans to split into two companies in October, has been reducing its headcount by more than 55,000 employees over the past couple of years and has been reducing its United States-booked air volume, as well.

The travel program achieved substantial negotiated savings, consolidated its preferred hotel companies and airlines and improved the traveler experience during 2014. Its goals are to provide joint business unit visibility to its spending and its budget, further drive policy compliance, strengthen its meetings negotiations and continue to achieve significant cost reductions. The company published a new global travel policy this year to enhance compliance with its efforts to have travelers book online, in advance, using approved suppliers and the lowest possible nonpremium fares.

The company spends 61 percent of its travel budget within the United States. Nearly one-quarter of the company's air spending was made at the European point of sale last year.

HP uses American Express as its primary corporate card supplier in the United States, where it operates on a central bill, individual pay basis.

The company uses Concur Travel as its primary provider of booking services worldwide. Its travelers currently book 79 percent of air tickets online, and 92 percent of those bookings are made without any agent assistance. It uses an internal legacy system to process expense reports globally.

22 ROCHE

BASEL, SWITZERLAND

2014 United States-Booked Air Volume: \$148.5 million

2014 Global Air Volume: \$310 million

Principal Air Suppliers: American, Delta, Southwest,

United, Virgin America

Principal Hotel Suppliers: Carlson Rezidor, Hilton,

Hyatt, Marriott, Starwood

Principal Car Rental Suppliers: Avis, Hertz, National Principal Online Booking Tool: Sabre's GetThere

Principal Expense Supplier: Concur Principal Card Supplier: Citi Consolidated U.S. TMC: BCD Travel

Roche's United States-booked air travel bumped up \$10 million in 2014, and the pharmaceutical, medical and healthcare company is on pace for the same growth in 2015, perhaps a bit less, considering inflation has maintained. Global air volume is tracking down 4.5 percent from 2014.

As the company's travel spend inches upward, it's taking large-scale pains to manage suppliers, continuing to conduct global air and hotel requests for proposals, continuing to consolidate travel management companies and working on internal collaboration. In fact, global-scale





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internal organization forms its biggest challenge.

The company avoided significant changes to policy, other than adding Los Angeles and Washington, D.C., to the list of U.S. exception cities in which employees can spend more than their policy's cap rate on hotels.

BCD Travel handles all of Roche's nongroup United States-booked air volume and is its primary TMC beyond U.S. borders. Ninety-eight percent of United States-booked plane tickets went through approved channels, namely GetThere. Through Citi, Roche runs a corporate liability, corporate pay program and offers rewards to U.S. travelers. Concur is the primary expense provider in the United States, and SAP takes most of the case load elsewhere.

In 2014, Roche employed 88,500 people and posted sales of 47.5 billion Swiss francs. It owns the United States' Genentech and is the majority shareholder in Japan's Chugai Pharmaceutical.

23 SIEMENS

MUNICH

2014 United States-Booked Air Volume: \$146 million Consolidated U.S. TMC: BCD Travel

BTN estimates that Siemens spent \$146 million on airline tickets at the U.S. point of sale in 2014, compared with \$155 million in 2013.

Regionalization efforts to align travel processes, policies, providers and tools in the Americas continued to be a focus in the past year. After consolidating aspects of its travel management program in the North American region, focus has broadened across the Americas with initiatives to consolidate strategy, tools, travel providers, policies and reporting. Last year, the company continued to grow its meetings management program, including the selection and introduction of a new global meetings technology platform.

A major focus of Siemens' travel management program in 2014 was an endeavor called Shake It Up, which included a comprehensive review and update of all processes, reporting and communications to ensure relevance, ease and transparency to travelers, stakeholders and management. Seeking to balance service and savings, Shake It Up has resulted in changes to traveler engagement, communications and education, resulting in new tools, policies and internal social media engagement, refreshed traveler scorecards and standardized internal business review formats for a consistent approach with management of Siemens' diverse businesses.

Siemens has achieved online booking rates in excess of 95 percent. The company last year reengineered its airline ticket-exchange program, helping to nearly eliminate any ticket spoilage, bolster its air savings and automate related fulfillment processes in order to reduce agent touches. In addition, new processes are now in place to support the selection of the company's preferred hotels and to ensure that the hotels are honoring the contracted rates.

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

Siemens, like many multinational companies, is growing into emerging markets, including Brazil, India and China. That has prompted it to extend relationships with new airline partners, including Emirates, Turkish Airlines and Air China.

24 THE WALT DISNEY CO.

BURBANK, CALIF.

2014 United States-Booked Air Volume: \$136 million

2014 Global Air Volume: \$168 million

2014 Global T&E: \$245 million

Principal Air Suppliers: American, Delta, United Principal Hotel Suppliers: Hilton, Marriott, Starwood

Principal Car Rental Suppliers: Enterprise, National Principal Online Booking Tool: Sabre GetThere

Principal Expense Supplier: SAP

Principal Card: Citi Visa Consolidated U.S. TMC: HRG

The Walt Disney Co.'s 2014 United States-booked air volume increased 2 percent year over year and in 2015 is expected to increase another 7 percent.

Last year, the entertainment and media company, using proprietary technology, enhanced certain processes in its travel program, including autoticketing and quality control, which allowed for improved efficiencies and timeliness.

In 2015, the company will look to drive higher compliance though its online booking tool.

U.S. air travel accounts for 60 percent of United States-booked air volume. The company uses HRG as its consolidated agency in the United States and the Asia/Pacific region. It uses BCD Travel in Europe, the Middle East, Africa and Latin America.

The firm uses SAP for expense management globally and Sabre's GetThere for its online booking tool.

In its 2014 fiscal year, which ended Sept. 27, 2014, the company reported \$48.8 billion in global revenue, up 8 percent year over year.

25 RAYTHEON

WALTHAM, MASS.

2014 United States-Booked Air Volume: \$134 million Consolidated U.S. TMC: BCD Travel

BTN estimates that aerospace and defense contractor Raytheon's 2014 United States-booked air volume increased about 10 percent from 2013 levels. Sales revenue in 2014 slipped to \$22.8 billion from \$23.7 billion the year prior. Earnings from continuing operations increased about 13 percent year over year to about \$2.2 billion.

Raytheon's travel services outside the United States are not consolidated, though its consolidated U.S. agency, BCD Travel, handles a portion of that business, as well.

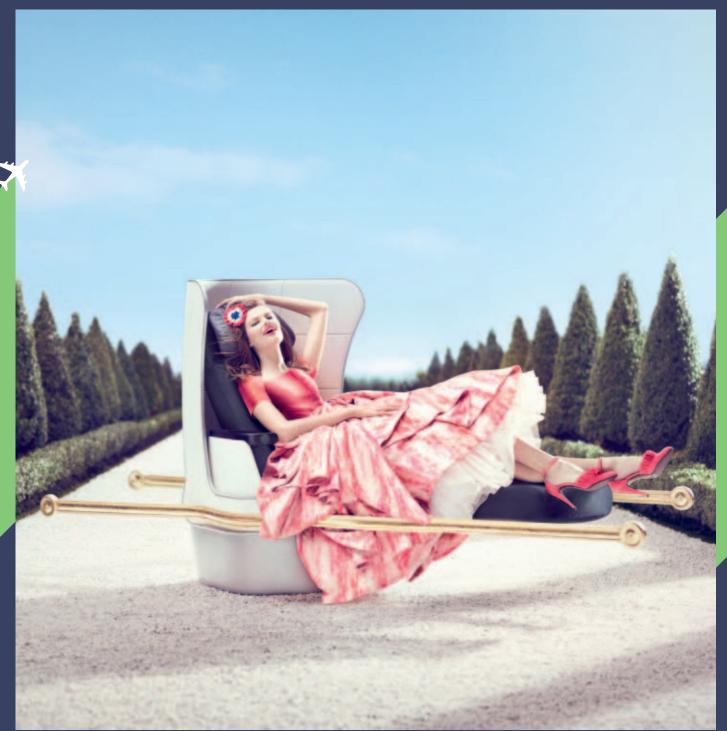
As part of a broader environmental initiative, the company pledged in 2011 to reduce the greenhouse gas emissions generated from business travel, indirect and logistics suppliers by 5 percent come 2015. Raytheon exceeded that figure by 2013 in terms of travel-related emissions reductions and by the end of 2014 had reduced them by 30 percent from the original 2011 figure. The company has a goal to reduce that figure by a further 5 percent in 2015.

For several years, Raytheon has operated a strategic meetings management program but does not mandate its use.

Raytheon had 61,000 employees worldwide at the end of 2014, down from 63,000 at the end of 2013.

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26 CHEVRON

SAN RAMON, CALIF.

2014 United States-Booked Air Volume: \$127 million

2014 Global Air Volume: \$290 million

2014 U.S. T&E: \$250 million

2014 Global T&E: \$400 million

Principal Air Suppliers: Delta, Singapore Airlines, Southwest, United

Principal Hotel Suppliers: Hilton, InterContinental, Marriott

Principal Car Rental Suppliers: Avis, Budget
Principal Online Booking Tool: Concur Travel
Principal Expense Supplier: Concur Expense
Principal Card Supplier: JPMorgan Chase
Consolidated Global TMC: Carlson Wagonlit Travel

Chevron's United States-booked air volume decreased by \$19 million from 2013 to 2014, and volume is expected to decrease by another \$37 million this year.

In 2014, the energy giant achieved several travel program accomplishments, including the selection and implementation of a new expense tool provider; the first deployment of Concur Travel in the Latin America region for the company; and the consolidation of its visa and passport providers.

The program also delivered value creation savings of \$98 million and distributed updated global travel policy procedures and guidelines to travelers and travel bookers.

Also in 2014, Chevron built on the previous year's work of updating the global travel policy by adding stronger language to highlight the safety benefits of booking through its preferred travel management company and online booking tool; altering existing procedures and guidelines documents to better reflect cultural, industry and business realities; encouraging the use of alternative modes communication, such as videoconferencing, to curb travel; and promoting cost-reductive purchasing behaviors among travelers.

For the current year, the company is focused on conducting a request for proposals for its corporate T&E card.

Chevron also is utilizing technologies and smart travel communications that illustrate ways to reduce overall travel spend and to drive stronger compliance.

The travel program continues to look for process efficiencies, emphasizing travel risk management and traveler safety. It also has begun a five-year strategy with Carlson Wagonlit Travel in more than 50 countries.

The company plans to drive policy through smart travel communications that illustrate ways to reduce overall travel spend.

Chevron's 14,450 business travelers use Concur for self-booking both inside and outside the United States.

Within the United States, about 80 percent of tickets were booked through the tool, and 65 percent of those bookings required no agent assistance. About 75 percent of tickets purchased in the United States were for flights headed to international destinations.

In the United States, Chevron uses commercial cards issued through JPMorgan Chase, and it uses Concur as its expense system.

Companywide air volume decreased by more than 9 percent year over year in 2014. Its companywide T&E of \$400 million was largely unchanged from 2013.

27 CISCO SYSTEMS

SAN JOSE, CALIF.

2014 United States-Booked Air Volume: \$124 million Principal Hotel Suppliers: Marriott, Starwood Principal Online Booking Tool: Sabre GetThere

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

In 2014, Cisco's United States-booked air volume rose just over 10 percent from 2013's \$111 million.

The company achieved a high level of success and significant savings in bringing a revenue-based rather than market sharebased approach to its hotel negotiations.

Last year, it signed multiple multiyear deals with multibrand hotel companies that contained no marketshare targets or room-night commitments. Instead, it promised only revenue in exchange for lower room rates. This strategy, which included working with a smaller number of preferred hotels, brought Cisco significant savings beyond its negotiated rates, which already were industry leading, while providing hotel chains with increased profits.

The philosophy behind the change is that rather than beating each other up for incremental savings or revenue, suppliers and buyers are better working as true partners. The approach is to focus on strategic goals instead of a dynamic or static pricing formula.

This strategy allows Cisco's hotel partners to earn more by improving service and reducing costs and includes working with preferred hotels to add Cisco's remote conferencing tools, such as TelePresence and WebEx, to their business centers.

To ensure that Cisco delivers on its commitments to its partners, the company has implemented policies that require travelers to book travel through preferred channels in order to be reimbursed.

A prompt in its online booking tool also prevents travelers from selecting nonpreferred hotels unless the booking is approved by a senior manager. As a result, the company now claims that compliance with preferred hotel suppliers is higher than 80 percent.

Cisco now is working to bring a similar approach to its deals with airlines.

Last year, the company launched mobile booking capabilities in more than 65 countries that enabled employees to book air, hotel and car rental through a smartphone app created by travel technology partner Sabre's GetThere and the internal Cisco team.

The travel team also worked with other policy owners to tighten the language in its global policy to ensure its clarity to travelers.

Meanwhile, the company reduced internal meetings spending this year by providing access to its virtual meetings tools through the online booking tool.

It also began consolidating its travel management services through key hubs and more recently moved these hubs to virtual centers, meaning that agents began working from home rather than from Cisco physical locations, reducing real estate costs and raising productivity.

Other goals for this year include reviewing actionable data insights and improving data delivery, as well as exploring open booking opportunities.



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KARI WENDEL Senior Director of Global Strategic Meetings Management Strategy and Solutions **Carlson Wagonlit Travel**



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28 GOOGLE

MOUNTAIN VIEW, CALIF.

2014 United States-Booked Air Volume: \$120 million

2014 U.S. T&E: \$326 million 2014 Global T&E: \$567 million

Principal Air Suppliers: British Airways, Delta, United Principal Hotel Suppliers: Hilton, Marriott, Starwood Principal Car Rental Suppliers: Enterprise, Hertz, National

Principal Online Booking Tool: Concur Travel **Principal Expense Supplier**: Concur Expense

Principal Card: Citi Visa

Consolidated Global TMC: Carlson Wagonlit Travel, though Google allows open booking

Google boosted its United States-booked air volume, 60 percent of which heads abroad, by \$20 million in 2014, and it expects to go \$25 million higher to \$145 million in 2015.

In 2014, the company, which has 45,000 travelers after integrating acquired companies, renewed its global contract with Carlson Wagonlit Travel, strengthened its supplier-management team and defined a new supplier review framework. Thus, in 2015, it aims to strengthen its relationships with air, hotel and car suppliers and conduct air and hotel requests for proposals. Also on the list: improving traveler comfort on extremely long-distance trips and developing TripsRewards, an internal electronic-auction in which travelers can bid on airline and hotel statuses.

Google, which has a single global travel policy, uses only one travel management company, Carlson Wagonlit Travel, but that agency handles only 30 percent of bookings by Google employees, as the tech giant allows open bookings. Still, managing travel in that environment and in the face of expected 10 percent to 15 percent growth is the company's biggest challenge.

Google uses Concur for booking within the United States and uses KDS elsewhere. It goes with Concur for expense reporting globally. It employs an individual bill, individual pay card program.

29 UNITED TECHNOLOGIES CORP.

HARTFORD, CONN.

2014 United States-Booked Air Volume: \$115 million

2014 Global Air Volume: \$164.9 million

2014 U.S. T&E: \$289 million **2014 Global T&E:** \$371 million

Principal Air Suppliers: American, Delta, United

Principal Hotel Suppliers: Hilton, Intercontinental, Marriott

Principal Car Rental Supplier: Avis

Principal Online Booking Tool: Concur Travel

Principal Expense Supplier: SAP

Principal Card: Citi Visa

Consolidated Global TMC: American Express Global Business Travel

Industrial products conglomerate and military contractor United Technologies Corp. in 2014 achieved overall savings of \$13 million. The decrease reflected a continuation of its travel policy to restrict business-class flights to 12 hours or longer for individual segments, up from eight and six hours, depending on the department.

By reducing unnecessary travel, UTC's 2014 United States-booked air volume decreased by about 6 percent from \$122 million. This trend will continue, as the company expects 2015 United States-booked air volume to drop to

\$112 million. UTC books travel through Concur in the United States, and uses Amadeus e-Travel Management outside of the United States.

It expects to complete its request for proposals process for a travel management company sometime in the fourth quarter of 2015. It also plans to renegotiate and implement a global airline program and a global expense management tool, as it currently uses Excel spreadsheets for expense reporting outside the United States. To further control expenses, it plans to implement a pre-trip approval process. The company has 70,000 business travelers.

30 NORTHROP GRUMMAN

FALLS CHURCH, VA.

2014 United States-Booked Air Volume: \$114.3 million

2014 Global Air Volume: \$118 million

2014 U.S. T&E: \$272 million **2014 Global T&E**: \$281 million

Principal Air Suppliers: American, Delta, United

Principal Hotel Suppliers: Hilton, InterContinental, Marriott

Principal Car Rental Suppliers: Avis, Budget
Principal Online Booking Tool: Concur Travel
Principal Expense Supplier: Concur Expense
Principal Card Supplier: JPMorgan Chase Visa

Consolidated U.S. TMC: BCD Travel

Due to a reduction in U.S. security spending, defense contractor Northrop Grumman's sales decreased from \$25 billion in 2013 to \$24 billion in 2014, according to its annual report. Net earnings in 2014 totaled \$2.1 billion, up from \$2 billion in 2013, owing primarily to an increase in net Financial Accounting Standards/Cost Accounting Standards pension adjustment and a lower tax rate, which were offset by an increase in unallocated corporate expenses.

Of Northrop Grumman's 64,300 employees, about 40,000 travel for business. The company's 2014 United States-booked air volume decreased 6.5 percent from \$107.3 million year over year.

While Northrop Grumman doesn't have a global travel policy, it has a single U.S. policy. In 2014 it began expanding its managed travel program internationally and expects to continue through 2015. The company projects United States-booked air spending to total \$118 million in 2015.

31 GOLDMAN SACHS

NEWYORK CITY

2014 United States-Booked Air Volume: \$113 million

2014 Global Air Volume: \$209 million

2014 U.S. T&E: \$326 million

2014 Global T&E: \$567 million

Principal Air Suppliers: American, Delta, United

Principal Hotel Suppliers: Hilton, Hyatt, Marriott/Ritz-Carlton

Principal Car Rental Suppliers: Avis, Hertz, National

Principal Online Booking Tool: GetThere
Principal Card Supplier: American Express

Consolidated Global TMC: American Express Global Business Travel

The finance company's United States-booked air volume didn't budge from 2013 to 2014, but it's on track to nudge upward from \$113 million to \$117 million this year. Just under half, 44 percent, of air bookings made in the United States headed abroad. Almost

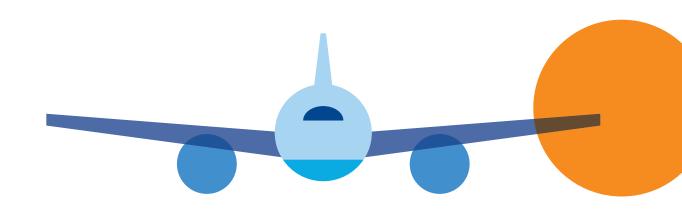


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all, 96 percent, went through approved online tools.

In 2014, the company concentrated on demand management, streamlining policy and developing reporting capabilities for the total cost of trip. In 2015, it's worked on business continuity planning and crisis management in the name of improving user experience. It's also optimized contract usage through point-of-sale initiatives and back-office processes.

Data quality and end-to-end trip management are among its biggest challenges. Goldman uses an individual bill, central pay card program and a proprietary expense reporting system.

32 CITIGROUP

NEWYORK CITY

2014 United States-Booked Air Volume: \$110 million Consolidated Global TMC: Carlson Wagonlit Travel

In 2014, United States-booked air volume for banking and financial services giant Citigroup declined from 2013 levels, according to a BTN estimate.

Citigroup completed a request for proposals for global airline services in 2014 and was in the midst of a contract of at least three years, signed in 2012, with Carlson Wagonlit Travel for global travel management services. The mega travel management company services the vast majority of Citigroup locations worldwide

The bank attributed about 178,700 metric tons of carbon dioxide-equivalent emissions to its global business travel for 2014, a year-over-year increase of about 18 percent. Citigroup additionally attributed about 6,650 metric tons of carbon dioxide-equivalent to its train travel, up about 24.6 percent from 2013.

Citigroup 2014 net revenue increased less than 1 percent to \$76.5 billion, and net income declined to \$7.3 billion from 2013's \$13.7 billion. The company had about 241,000 employees at the end of 2014, about 10,000 fewer than it did 12 months earlier.

33 NOVARTIS

BASEL, SWITZERLAND

2014 United States-Booked Air Volume: \$104.8 million
Principal Air Suppliers: American, Delta, United
Principal Hotel Suppliers: Hilton, Marriott, Starwood
Principal Car Rental Suppliers: Enterprise, Hertz, National
Principal Online Booking Tool: Sabre GetThere
Principal Expense Supplier: Concur Expense
Principal Card: JPMorgan Chase MasterCard
Consolidated Global TMC: HRG

In 2014, Swiss pharmaceutical company Novartis underwent a significant restructuring, which included divesting several of its business units, such as animal health, blood transfusion and influenza vaccines. The changes also included acquiring pharmaceutical company GlaxoSmithKline's oncology products and a joint-venture deal with GSK for consumer healthcare.

Due to the restructuring, Novartis delayed its initiative to launch requests for proposals for several of its suppliers but plans to continue the RFPs in 2015.

By promoting alternatives to travel, such as videoconferencing, Novartis reduced its travel spend. Its 2014 United States-booked air volume declined about 23 percent year over year to \$104.8 million from \$135.8 million in 2013. Novartis is set to continue this downward trend for 2015 and expects to achieve about \$110 million in United States-booked air volume for 2015.

34 SAP

WALLDORF, GERMANY

2014 United States-Booked Air Volume: \$104 million Consolidated U.S. TMC: BCD Travel

Fueled by expanded activity after a steady stream of acquisitions in recent years, business management software producer SAP increased its United States-booked air spending in 2014, according to a *BTN* estimate.

The company's overall 2014 revenue totaled about €17.6 billion, up 4 percent from 2013, and its operating profit slipped about 3 percent to €4.3 billion. SAP had about 74,400 full-time equivalent employees worldwide at the end of 2014, up from about 66,570 at the end of 2013.

The company attributes its increased 2014 business travel for its failure to reach an internal emissions-reduction goal. While total SAP net emissions dropped from 545 kilotons of carbon dioxide in 2013 to 500 kilotons in 2014, the company had set a target of 440 kilotons. SAP noted that its growing business led to more travel in 2014, which outweighed emissions-reduction efforts in other areas of the company.

SAP's environmental policy calls for the reduction, by 2020, of the level of greenhouse gases it generates to year-2000 levels, and the reduction of business travel, flights in particular, to help reach that goal.

SAP's largest 2014 acquisition was that of Concur Technologies in December. Among the chief suppliers of business travel technology, Concur brings to SAP its online booking, expense management, mobile travel management and mid-office products and services.

35 PEPSICO

PURCHASE, N.Y.

2014 United States-Booked Air Volume: \$100 million Consolidated U.S. TMC: American Express Global Business Travel

United States-booked air volume for PepsiCo rose more than 4 percent from 2013 levels, based on a revised *BTN* estimate for 2013. That was in line with the beverage and snack food conglomerate's 2014 revenue, which was up 4 percent in 2014 to \$66.7 billion from the prior year.

Operating in more than 200 countries and territories, the company employed about 271,000 people worldwide at the end of 2014, down 3,000 from the previous year, despite an increase of 1,000 in the United States to 107,000.

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



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36 GENERAL MOTORS

DETROIT

2014 United States-Booked Air Volume: \$96 million

Consolidated Global TMC: American Express Global Business Travel

BTN estimates that General Motors increased its airline spend from the U.S. point of sale to \$96 million in 2014. General Motors' net revenue for 2014 rose by less than 1 percent to \$156 billion. The Detroit-based auto manufacturer, which along with partners produces vehicles in 30 countries, reported a decline in headcount in 2014. GM had 216,000 employees at the end of the year, down from 219,000 in 2013. Full-year adjusted earnings before interest and tax fell to \$6.5 billion in 2014 from \$8.6 billion in 2013.

37 AMAZON.COM

SEATTLE

2014 United States-Booked Air Volume: \$95 million Consolidated U.S. TMC: Carlson Wagonlit Travel

BTN estimates online retailer Amazon.com's 2014 United States-booked air volume increased 35 percent. Net sales were up almost 20 percent to \$89 billion last year. Not surprising for one of the world's largest tech companies, Amazon taps some of the more recent technological innovations to keep its travel costs under control, including Yapta to monitor airfares. The company, which has a "strongly encouraged" travel policy, is exploring the possibility of putting rate caps on cities for hotel stays. Amazon travelers will account for about 190,000 room nights in Seattle alone this year.

At the end of 2014, Amazon employed about 154,100 full-time and parttime workers, though its employment level fluctuates with the seasonality of its business.

38 MEDTRONIC

MINNEAPOLIS

2014 United States-Booked Air Volume: \$94.6 million

2014 Global Air Volume: \$144.3 million

2014 U.S. T&E: \$290 million **2014 Global T&E**: \$420.6 million

Principal Air Suppliers: Delta, KLM, United

Principal Hotel Suppliers: Hilton, Marriott, Starwood Principal Car Rental Suppliers: Avis, National Principal Online Booking Tool: Sabre GetThere Principal Expense Supplier: adSoft Expense Express Principal Card Supplier: American Express

Consolidated Global TMC: American Express Global Business Travel

In 2014, medical device manufacturer Medtronic globally expanded its American Express card program, increased its adoption rates and key performance indicators and deployed more technologies across regions, including its online booking tool. United States-booked air volume totaled \$94.6 million, up 17 percent year over year. In 2015, the company expects United States-booked air volume to reach \$130 million, owing to the acquisition of global healthcare products company Covidien.

Medtronic is adding between 35,000 and 37,000 employees to its travel program due to the acquisition. For the fiscal year ending April 24, 2015, Medtronic had 92,500 full-time employees, according to its annual report.

39 **AON**

LONDON

2014 United States-Booked Air Volume: \$94.2 million Consolidated U.S. TMC: Carlson Wagonlit Travel

Aon reported a 2014 revenue of \$12 billion, up 2 percent year over year. Including subsidiaries, the risk management, insurance and human resources provider has operations in more than 120 countries and sovereignties. The company had approximately 69,000 employees at the end of 2014, up nearly 5 percent from 2013 levels.

Aon continues to expand the global footprint of its managed travel program with a focus on reducing costs through demand management, increased online adoption and strategic meetings management.

40 NIKE

BEAVERTON, ORE.

2014 United States-Booked Air Volume: \$92.8 million

2014 Global Air Volume: \$139.4 million

2014 Global T&E: \$20 million

Principal Air Suppliers: Alaska, American, Delta
Principal Hotel Suppliers: Hyatt, Kimpton, Starwood
Principal Car Rental Suppliers: Enterprise, Hertz, National

Principal Online Booking Tool: Sabre GetThere

Principal Expense Supplier: Infor

Principal Card Supplier: American Express

Consolidated Global TMC: ATG

Sports and fitness retailer Nike revised its T&E policy in 2014 and uses an individual bill, central pay program. The goal for this year has been making business travel easier and consumer friendly for its 42,381 travelers via apps.

Its United States-booked air volume breaks down as 30 percent domestic and 70 percent international. The company employs a single global travel policy, and its greatest travel management challenge is data collection.

In its fiscal year 2015, Nike's revenue grew 10 percent to \$30.6 billion, including \$13.7 billion originating in the United States. Greater China similarly turned in double-digit percentage revenue growth, and Western Europe kicked in \$5.7 billion.

41 COMCAST

PHILADELPHIA

2014 United States-Booked Air Volume: \$90 million Consolidated U.S. TMC: BCD Travel

BTN estimates that media conglomerate Comcast spent \$90 million in United States-booked air travel in 2014, down slightly from its spending levels in 2013.

While a \$45 billion takeover of Time Warner Cable fell apart earlier this year, Comcast, which also took full ownership of NBCUniversal in 2013, remains in acquisition mode, including recent stakes acquired in Vox Media and BuzzFeed. The company's revenue increased 6.3 percent to \$68.8 billion in 2014, and net income increased 23.5 percent to \$8.4 billion.

BCD Travel acts as Comcast's agency in the United States, and travelers book through Sabre's GetThere tool.

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42 FEDEX

MEMPHIS

2014 United States-Booked Air Volume: \$88 million Consolidated U.S. TMC: BCD Travel

Delivery services corporation FedEx reduced its United States-booked air spending from 2013 levels in 2014, according to a BTN estimate.

FedEx in its 2014 fiscal year, which ended May 31, 2014, recorded 45,758 metric tons of carbon dioxide equivalent attributed to its business travel, down about 4 percent from its fiscal 2013 figure.

The company in fiscal year 2014 sought to reduce the travel required for employee training in favor of technology and alternative education solutions and plans to further develop the new approach.

FedEx revenue in fiscal year 2014 increased about 4 percent year over year to about \$45.6 billion, and total income dipped about \$390 million to \$2.3 billion.

43 HONEYWELL

MORRISTOWN, N.J.

2014 United States-Booked Air Volume: \$85 million

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

BTN estimates that Honeywell's United States-booked air volume rose modestly from 2013 levels to \$85 million.

Selling, general and administrative expenses rose slightly to \$5.5 billion last year from \$5.2 billion in 2013, as net sales also increased from \$39 billion to \$40.3 billion.

The multinational engineering services and aerospace company employed 127,000 people worldwide at the end of 2014, down from 131,000 at the end of the prior year. Approximately 50,000 employees were located in the United States at year-end 2014. Honeywell travelers use online booking and expense management tools furnished by Concur.

43 PROCTER & GAMBLE

CINCINNATI

2014 United States-Booked Air Volume: \$85 million Consolidated U.S. TMC: Egencia

Consumer products conglomerate Procter & Gamble is in the midst of a major brand restructuring, exiting some lines of business entirely and reducing the number of products it offers in others. With sales revenue and expenses declining year over year, BTN estimates that P&G's United States-booked air volume also dropped from 2013 levels in 2014.

For the 12 months ending June 30, 2015, the end of P&G's fiscal year, the company reported \$76.3 billion in sales revenue, down from \$80.5 billion in the previous 12-month period, a decline exacerbated by currency fluctuations. P&G's selling, general and administrative expenses dropped to \$23.6 billion from \$24.7 billion during the same time period. The total number of P&G employees worldwide also fell, from 118,000 in fiscal year 2014 to 110,000 this year.

Since 2010, P&G has consolidated U.S. travel agency services with Egencia, serving as the travel management company's largest U.S. client. Other agencies, including HRG, handle travel management services outside the United States.

The company long has operated an extensive strategic meetings management program; in 2014, it used Cvent for SMM technology services. P&G also has installed an extensive videoconferencing network to improve collaboration and reduce travel. The company has operations in about 80 countries.

43 TIME WARNER INC.

NEWYORK CITY

2014 United States-Booked Air Volume: \$85 million

2014 Global Air Volume: \$119 million

2014 U.S. T&E: \$227 million 2014 Global T&E: \$277 million

Principal Air Suppliers: British Airways, Delta, United Principal Hotel Suppliers: Hilton, Marriott, Starwood Principal Car Rental Suppliers: Enterprise, Hertz, National

Principal Online Booking Tool: Concur Travel **Principal Expense Supplier:** Concur Expense **Principal Card Supplier:** American Express Consolidated Global TMC: BCD Travel

Time Warner Inc.'s United States-booked air volume totaled \$85 million in 2014. The media giant counts Delta, British Airways and United as its preferred airline suppliers, as well Concur for travel and expense management.

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

46 EMC

HOPKINTON, MASS.

2014 United States-Booked Air Volume: \$81.8 million

2014 Global Air Volume: \$141.8 million

2014 U.S. T&E: \$222 million 2014 Global T&E: \$435 million

Principal Air Suppliers: American, Delta, United Principal Hotel Suppliers: Hilton, Marriott, Starwood **Principal Car Rental Suppliers:** Avis, Enterprise, National

Principal Online Booking Tool: Concur Travel Principal Expense Supplier: Concur Expense **Principal Card Supplier:** American Express

Consolidated Global TMC: American Express Global Business Travel

As part of EMC's ongoing efforts to contain costs, it implemented a pre-authorization tool in August 2014, resulting in a 23 percent reduction in overall travel. It's expected to further reduce travel in 2015.

The information management and technology company's United States-booked air volume declined to \$81.8 million in 2014 from \$86.8 million in 2013. For 2015, EMC expects United States-booked air volume to remain mostly flat at \$81 million.

EMC implemented the Concur online booking tool in more markets around the globe in 2014.



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47 PFIZER

NEWYORK CITY

2014 United States-Booked Air Volume: \$81.5 million

2014 Global Air Volume: \$210 million

Principal Air Suppliers: American, Delta, United Principal Hotel Suppliers: Hilton, Marriott, Starwood

Principal Car Rental Suppliers: Avis, Budget
Principal Online Booking Tool: Concur Travel
Principal Expense Supplier: Concur Expense
Principal Card Supplier: American Express
Consolidated U.S. TMC: BCD Travel

Pharmaceutical company Pfizer's United States-booked air volume decreased in 2014 by \$8 million from 2013 levels. That volume is expected to decrease again this year.

In 2014, the travel program consolidated its bookings globally under Concur. It focused on improving compliance and increasing traveler engagement and introduced key performance indicators to share with key stakeholders. This year, the program is looking to enhance duty of care.

BCD Travel services the company's 6,300 travelers inside the United States, while Carlson Wagonlit Travel primarily handles business elsewhere. Seventy-one percent of United States-booked air tickets went through Concur, and 66 percent of those required no agent assistance. American Express provides corporate cards in a central bill, central pay configuration.

48 DELL

ROUND ROCK, TEXAS

2014 United States-Booked Air Volume: \$80 million

Consolidated Global TMC: American Express Global Business Travel

Computing technology firm Dell became a privately held company in October 2013 after a leverage buyout. *BTN* estimates Dell's 2014 United States-booked air volume decreased slightly from 2013 levels.

For its 2015 fiscal year, Dell, which ended Jan. 30, 2015, attributed 81,297 metric tons of carbon dioxide-equivalent emissions to its business travel, about a 6.5 percent decrease from the prior 12-month period.

Dell has about 900 hotels in its preferred directory, and began using hotel-shopping tool tripBAM this year, a move that could help Dell assess and reduce its preferred-property roster.

48 CHURCH OF JESUS CHRIST OF LATTER-DAY SAINTS

SALT LAKE CITY

2014 United States-Booked Air Volume: \$80 million

Efficiency was the keyword at the Church of Jesus Chris of Latterday Saints in 2014, as the church trimmed United States-booked air volume 11.1 percent to approximately \$80 million.

LDS, which counts more than 10,000 volunteer missionaries and

corporate travelers among its membership, continued its focus on keeping operational costs down in 2014 in light of a significant workload demand increase. While that workload rose an estimated 40 percent, costs went up by only 20 percent.

This year, the church is finalizing a global optimization exercise that included renegotiating global contracts for airline, hotel and car rental suppliers. It also aims to improve operating efficiency and identify global standards for its travel management company.

While LDS is not consolidated with any particular agency in the United States, Carlson Wagonlit Travel handles a significant portion of its travel both there and globally.

50 THE BOSTON CONSULTING GROUP

BOSTON

2014 United States-Booked Air Volume: \$77 million

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

Privately held management consulting firm Boston Consulting Group increased its spending on United States-booked air travel in 2014, according to a *BTN* estimate.

Overall BCG revenue increased from \$4 billion in 2013 to \$4.6 billion, and the firm added about 800 net staffers last year to total 10,500 employees. BCG has offices in 46 countries.

BCG's consultants travel frequently, often for four days in a given week, and the company, in part to combat the work-life balance effects of such scheduling, promotes a program that requires project managers to build in predictable time off for consultants.

51 ABBVIE

NORTH CHICAGO, ILL.

2014 United States-Booked Air Volume: \$75 million Principal Online Booking Tool: Concur Travel Principal Card Supplier: Bank of America

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

AbbVie, a global biopharmaceutical company formed on Jan. 1, 2013, from a stock split by Abbott Laboratories, employed more than 26,000 people and sold its products in more than 170 countries in 2014.

2014 sales revenue, which outpaced the independent, publicly traded company's original projections, reached \$19.96 billion, up 6 percent from 2013's \$18.8 billion.

AbbVie's global travel program has succeeded in improving data collection in order to support ongoing duty of care, supplier negotiations and better service to travelers. The company, which spent 72 percent of its 2014 United States-booked air volume on international airline tickets, has issued a single global travel policy. It also has issued guidelines that require its suppliers to conduct business in a legal and ethical manner.

AbbVie's primary U.S. corporate card supplier, Bank of America, issues cards on an individual bill, central pay basis. Concur provides its primary online booking and expense systems worldwide.

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NORTH AMERICA ==== TAIPEI ==== ASIA





51 GENERAL DYNAMICS

FALLS CHURCH, VA.

2014 United States-Booked Air Volume: \$75 million

With revenue levels holding steady for the past few years, *BTN* estimates that 2014 United States-booked air spending at aerospace conglomerate and defense contractor General Dynamics nevertheless slipped to \$75 million.

The company's \$30.85 billion in collected 2014 sales revenue was only slightly lower than its 2013 revenue total of \$30.93 billion and its 2012 total of \$31 billion.

General Dynamics' total expenses in 2014 decreased about 1 percent year over year to \$27 billion on the heels of a 10 percent decrease in 2013, with cost-reduction efforts particularly significant in the company's information systems and technology division.

In 2014, the number of General Dynamics employees increased from 96,000 to 99,500.

51 MERCK

KENILWORTH, N.J.

2014 United States-Booked Air Volume: \$75 million

2014 Global Air Volume: \$175 million

Principal Air Suppliers: American, Delta, United

Principal Hotel Suppliers: Hilton, Intercontinental Hotel Group, Marriott

Principal Car Rental Suppliers: Enterprise, Hertz, National

Principal Online Booking Tool: Concur Travel

Principal Expense Supplier: SAP

Principal Card Supplier: American Express

Consolidated Global TMC: American Express Global Business Travel

From 2012 through 2013, Merck underwent an extensive reduction in travel, but since 2014, it has begun increasing its product launches and meetings, as well as opening new overseas offices. All that contributed to more travel. In 2014, the pharmaceutical company experienced a 19 percent year-over-year increase in United States-booked air volume, and it expects a 23 percent increase to \$92 million for 2015.

Last year, Merck improved its data reporting by using a combination of American Express resources, data analytics tool Spotfire and data from EY. In June 2014, it implemented Yapta's FareIQ tool for U.S. point-of-sale flight transactions, which has resulted in about a half a percent in savings on total U.S. point-of-sale transactions.

Merck improved compliance with the help of a pre-trip auditing tool implemented in mid-2013 that sends travelers notifications when they, for example, book noncompliant fares or don't book a hotel after they book a flight. It also implemented various booking tools globally to increase online adoption. The company additionally worked with various participants to ensure nonemployees use Merck's travel management company to book travel.

Merck is reorganizing its TMCs so American Express Global Business Travel covers the Americas and Europe, while BCD Travel will be responsible for Asia/Pacific and Japan. Previously, American Express GBT handled North America, Asia/Pacific and Japan, while BCD handled parts of Europe and Latin America. Merck expects the project to be completed by the second quarter of 2016. It also is exploring having secondary cards in certain markets, including Latin America.

54 DANAHER

WASHINGTON, D.C.

2014 United States-Booked Air Volume: \$74 million

BTN estimates that the global science and technology conglomerate Danaher spent 5 percent more on airfare from the U.S. point of sale in 2014 than it did in the prior year.

Two years ago, the company consolidated its U.S. travel management company services with BCD Travel and American Express Global Business Travel, though it still uses multiple TMCs outside the United States.

Danaher's annual sales grew at a compounded annual rate of 9.6 percent from 2006 through 2014, compared with a 5.5 percent average for the conglomerate sector, according to Barclays, which described the company as among the few "that consistently screen at the top of most metrics." The company's annual operating margin has topped its peers for eight straight years, landing at 17.2 percent last year, compared with the sector average of 14.8 percent.

Danaher comprises more than 50 companies from five reporting segments: test and measurement, diagnostics and industrial technologies, environmental, dental and life sciences. Only a couple of those have dedicated travel managers, which is why Danaher's travel council is a continually changing team. The council meets virtually monthly and face-to-face annually.

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

Danaher employs a globally diverse team of 71,000 associates, up from 66,000 in 2013. In 2014, they generated \$19.9 billion in revenue, up from \$19.1 billion in 2013. Meanwhile, Danaher has announced that by the end of 2016, it will spin off a to-be-named industrial firm comprised of its testing and measurement equipment unit, the Gilbarco Veeder-Root fuel pump business, Matco mechanics tools and automation gear and sensors. Those businesses had combined revenue of about \$6 billion in 2014, though several are susceptible to sharp swings in demand, and grew about 2 percent, according to analyst estimates. The science and technology company will retain the Danaher name.

54 INTERNATIONAL MONETARY FUND

WASHINGTON, D.C.

2014 United States-Booked Air Volume: \$74 million

Principal Hotel Suppliers: Hilton, InterContinental, Starwood

Principal Online Booking Tool: Sabre GetThere
Principal Expense Supplier: PeopleSoft
Principal Card Supplier: BMO Diners Club

Consolidated U.S. TMC: Tbiz

The International Monetary Fund, composed of 188 countries, promotes global growth and economic stability to member countries and developing countries. As of March 13, it's lending agreements totaled \$163 billion. It staffs 2,630 employees from 147 countries.

IMF's 2014 United States-booked air volume rose by \$1 million \$74 million. The increases owed to such unexpected events as the crisis in Greece. Additionally, IMF tends to purchase premium-cabin seats, making the organization more susceptible to higher fare and fuel surcharge increases.

In 2014, IMF implemented new airline alliance contracts. This year, it's considering simplifying its internal trip-approval system.



54 UBS

ZURICH

2014 United States-Booked Air Volume: \$74 million 2014 Global T&E: \$463 million

Financial services and investment bank UBS spent 457 million Swiss francs on travel and entertainment in 2014, up about 2 percent from 2013. *BTN* estimates that UBS's 2014 United States-booked air volume increased, as well.

In 2014, the company offset the entire 75,300 metric tons of carbon dioxide equivalent generated by its business travel, up from 72,600 in 2013. UBS since has offset 100 percent of the emissions generated by travel. The company encourages employees to use high-speed rail travel or such alternatives as remote conferencing to reduce emissions.

UBS travelers racked up 684 million person-kilometers last year, up about 4 percent from 2013. About 97.1 percent of the 2014 person-kilometers were generated by air travel, 1.8 percent via rail travel and the remainder via roads. UBS travelers flew about 296,000 flight segments, a 3 percent increase year over year.

It totaled 28 billion Swiss francs in operating revenue last year, about a 1 percent increase year over year, and before-tax profit slipped to 2.5 billion Swiss francs from 3.3 billion in 2013.

In 2014, the company had about 60,200 full-time-equivalent employees, about the same as in 2013.

57 THE COCA-COLA CO.

ATLANTA

2014 United States-Booked Air Volume: \$72 million

2014 Global Air Volume: \$109 million

2014 U.S. T&E: \$135 million 2014 Global T&E: \$208 million

Principal Air Suppliers (in terms of spend): American JV,

Delta JV, Southwest, United JV

Principal Hotel Suppliers (in terms of spend): Hilton,

InterContinental, Starwood

Principal Car Rental Supplier: Hertz Principal Online Booking Tool: Deem

Principal Expense Supplier: SAP

Principal Card Supplier: American Express Consolidated U.S. TMC: Carlson Wagonlit Travel

The Coca-Cola Co. increased its 2014 United States-booked air volume by 46 percent, after cutting back its air volume in 2013. The company expects its air volume to decrease 15 percent during 2015.

The beverage giant in 2014 sourced a three-year global airline program, consolidated its travel management services in the Middle East, Africa, Europe and Asia and sourced a new global end-to-end travel booking to expense system. In 2015, the company is focused on implementing that system in North America; further consolidating and implementing travel management services in the Middle East, Europe, Asia and Africa; and leveraging its total global network of bottler, manufactures and affiliates to maximize benefits for Coca-Cola and its partners.

Coca-Cola maintained its travel policy in 2014, and in 2015, it will consider making modifications to class of service and enacting spend-reduction initiatives. Coca-Cola's travel outside the United States is

consolidated with American Express Global Business Travel, HRG and Carlson Wagonlit Travel.

American Express supplies corporate cards for Coca-Cola's approximately 30,000 business travelers. Coca-Cola utilized Deem as its booking tool in the United States in 2014, while travelers outside the United States booked online through Concur. The company is in the process of making Concur its consolidated global booking tool.

SAP served as the company's global expense reporting system in 2014, but Coca-Cola is converting to Concur in 2015.

58 KOCH INDUSTRIES

WICHITA, KAN.

2014 United States-Booked Air Volume: \$71 million

2014 Global Air Volume: \$91 million Consolidated Global TMC: BCD Travel

Diversified manufacturer Koch Industries' global consolidated agency was BCD Travel in 2014, but this year it transitioned to Carlson Wagonlit Travel.

United States-booked air volume increased almost 40 percent in 2014 from \$53 million, owing to increased travel and acquisitions.

Koch is one of the largest private companies in America, with estimated annual revenues as high as \$115 billion, according to *Forbes*. With a presence in more than 60 countries, it employs more than 100,000 people worldwide, about 60,000 of those in the United States.

59 ALCATEL-LUCENT

PARIS

2014 United States-Booked Air Volume: \$70 million

2014 Global Air Volume: \$130 million

2014 U.S. T&E: \$150 million **2014 Global T&E:** \$270 million

Principal Air Suppliers: American, Delta, United

Principal Hotel Suppliers: Hilton, InterContinental, Marriott **Principal Car Rental Suppliers:** Avis, Enterprise, Hertz

Principal Online Booking Tool: Concur Travel
Principal Expense Supplier: Concur Expense
Principal Card Supplier: American Express
Consolidated Global TMC: Carlson Wagonlit Travel

In April, telecommunications equipment manufacturer Alcatel-Lucent entered into an agreement to be acquired by Nokia. The deal is expected to close in the first half of 2016.

Last year, Alcatel-Lucent established a single global travel policy, and this year it is working to outsource some travel functions.

It has deployed videoconferencing systems to reduce emissions related to business travel. At the end of 2014, the company installed 340 videoconferencing "hubs" worldwide. Employees used the videoconferencing network at an average rate of 2,933 hours per month in 2014. The company reported a 37 percent decline in business travel emissions since it began tracking the metric in 2008, according to its 2014 sustainability report.

Last year, it migrated to Concur Travel and Concur Expense. While Concur Travel has been the primary booking tool in the United States, Alcatel-Lucent also used KDS in other countries.



59 AMERICAN INTERNATIONAL GROUP

NEWYORK CITY

2014 United States-Booked Air Volume: \$70 million Preferred Online Booking Tools: Amadeus e-Travel Management, Concur Travel

Consolidated U.S. TMC: HRG

Although insurance and financial services provider American International Group is in cost-cutting mode, BTN estimates its United Statesbooked air volume increased 13 percent in 2014. The company plans to reduce net general operating expenses in the range of 3 percent to 5 percent each year through 2017. AIG consolidated U.S. travel management services with HRG in 2013. As of Dec. 31, AIG had approximately 65,000 total employees. Total revenue in 2014 declined 6.5 percent to \$64.4 billion, and profit declined 17.1 percent to \$7.5 billion.

59 SANOFI

2014 United States-Booked Air Volume: \$70 million

2014 U.S. T&E: \$130 million

Principal Air Suppliers: American, Delta, United Principal Hotel Suppliers: Hilton, Marriott, Starwood

Principal Car Rental Suppliers: Avis, Enterprise

Principal Online Booking Tool: Concur Travel

Principal Expense Supplier: Concur Expense

Principal Card Supplier: American Express

Consolidated U.S. TMC: BCD Travel

Pharmaceutical company Sanofi in 2014 made several changes to streamline its travel program, including renegotiating its vendors, consolidating its expense management tool and implementing a travel expense dashboard for managers.

Sanofi maintained its existing travel policy during 2014, and this year is focused on demand management and cost avoidance. It has created a manager-level travel dashboard to enhance behavior management. The company is also in the process of updating its travel policy to eliminate first-class fares for all business travelers.

Its biggest travel management challenge continues to be managing a global program with regional variation. The company's 2014 United States-booked air volume increased 9 percent year over year and is expected to rise another 4 percent this year. Sanofi's approximately 10,000 business travelers utilize Concur globally for expense reporting and for booking online. Sanofi travelers booked 91 percent of U.S. air tickets through Concur, and 85 percent of those required no agent assistance. American Express provides corporate cards in the United States through an individual bill, central pay model.

Sanofi's revenue last year grew 2.5 percent to €33,770 million.

LONDON

2014 United States-Booked Air Volume: \$69.8 million Consolidated Global TMC: Carlson Wagonlit Travel

As crude oil prices have dropped, energy companies have cut their travel expenses, and BP is no exception. The oil and energy giant's 2014 United

States-booked air volume of \$69.8 million is down nearly 25 percent compared with 2013 levels.

BP's lower volume these days is not merely the result of travel cutbacks, however. Through building strong compliance, the company has found significant savings through negotiations with its airline partners.

It has developed its own travel compliance tool with a dashboard showing how well individual travelers follow policies regarding online booking, advance purchase, lowest logical airfare and the preferred hotel program. That helped raise U.S. compliance 10 percent within six months.

The company also has boosted compliance globally by working with its booking tool provider, Sabre's GetThere, to standardize settings so it has the same look, feel and process regardless of where it is being used.

63 L-3 COMMUNICATIONS

NEWYORK CITY

2014 United States-Booked Air Volume: \$68.5 million

Principal Card Supplier: American Express

Consolidated Global TMC: American Express Global Business Travel

BTN estimates that aerospace and defense contractor L-3 Communications spent \$68.5 million in United States-booked air travel in 2014.

L-3 has consolidated globally with American Express Global Business Travel, including operations in the United States, Canada, the United Kingdom, Germany, the United Arab Emirates, India, Singapore, South Korea and Australia. The company also has a significant presence in Saudi Arabia. American Express supplies corporate cards for travelers worldwide.

Net sales at the company declined 3.9 percent year over year to \$12.1 billion, and net income was down 11.6 percent to \$664 million. The company reported 45,000 employees globally in 2014.

64 WAL-MART STORES

BENTONVILLE, ARK.

2014 United States-Booked Air Volume: \$68 million

BTN estimates that Wal-Mart Stores increased its United Statesbooked air volume in 2014. Wal-Mart has established a strategic meetings management effort, and in the fourth quarter of 2014, it finalized an expanded agreement with meetings technology provider Cvent for SMM technology and services. The company's net sales for the 12 months ending Jan. 31, 2015, increased about 2 percent year over year to \$482.2 billion, and operating income increased \$275 million to \$27.1 billion. Worldwide, Wal-Mart employs 2.2 million people.

LONDON

2014 United States-Booked Air Volume: \$68 million **Consolidated Global TMC: BCD Travel**

BTN estimates that advertising and public relations giant WPP—which has dozens of subsidiaries including Ogilvy & Mather and Young & Rubicam—increased United States-booked air spending in 2014. Revenue

Air France

Air France is investing more than \$560 million in new products between June 2014 and year-end 2016. Air France Boeing 777s, the bulk of the long-haul fleet, are being retrofitted with new seats and interiors that add comfort in every class of service. The 777-200s will feature Business, Premium **Economy and Economy** cabins, while the 777-300s will have four cabins includina La Première. Retrofits of the A330 and A380s are scheduled to follow next.

La Première Suites

Air France's most spacious cabin, La Première is reinvented as four elegant suites on retrofitted 777-300s, each offering travelers more than 32 square feet of space, adjustable privacy curtains, personal wardrobe closets, 24-inch screens and an oversized table. The seat and ottoman transform into a real 6-1/2-foot-long bed complete with a mattress, duvet and turndown service. Customers enjoy customized fine dining with menus by Michelin-starred French chefs accompanied by rare vintages and decadent desserts from Paris patisserie Lenôtre.

VIP attention at check-in and throughout the journey are central to the La Première experience including expedited security





where available, access to the exclusive Paris-CDG lounge with a full service restaurant and spa, and new business jet services to and from destinations across Europe.

New Fully Flat Business Seat Bed

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

Enhanced Premium Economy

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

Added Comfort in New Economy

The redesign extends to Economy, where brand new ergonomically-designed seats offer more legroom, individual USB ports and electrical outlets, and larger screens and tray tables. A new HD inflight

entertainment system provides more movies and other content for travelers in all cabins to choose from. On long-haul flights, Air France Economy continues a tradition of providing exceptional value with a French touch, including complimentary beer, wine, Champagne, and spirits.

A Global Network and Europe's Leading Hub

Air France is a major worldwide carrier with a fleet of 329 aircraft and a vast network of over 180 destinations on five continents centered on a global hub in Paris.

Air France and the airport authority have invested \$743 million since 2012 to enhance the passenger experience at Paris Charles de Gaulle Airport by moving flights closer together, opening new boarding areas and pedestrian connections, and adding traveler-friendly amenities like free Wi-Fi, children's play areas and interactive info kiosks.

Paris Charles de Gaulle Airport remains Europe's largest hub in terms of connection opportunities and was nominated the "World's Most Improved Airport" at the prestigious Skytrax 2015 Awards, where Air France was awarded the "World's Most Improved Airline."

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increased 4.6 percent, 11.3 percent in constant currency, to £11.5 billion.

WPP flew about 560 million miles in business-related air travel in 2014, up from 538 million in 2013. Of the 2014 total, 306 million miles were on long-haul flights, 200 million on medium-haul trips and the remainder on short-haul flights. Miles flown per full-time-equivalent employee in 2014 increased slightly to 4,531 from 4,519 in 2013. Air miles per employee declined 14 percent from 2006 levels, though total air miles increased 35 percent during that period. At the end of 2014, WPP had 121,400 employees, an increase of 3.7 percent year over year.

The company offset 96,577 metric tons of carbon dioxide equivalent emissions in 2014, up less than 1 percent from the 95,879 metric tons it offset in 2013. Since 2007, it has offset 100 percent of its business travel-related emissions through carbon credits, the purchase of which is charged to individual operating companies based on air mileage. That provides an incentive to manage the volume of air bookings.

WPP has built an extensive global videoconferencing network that it promotes as an alternative to air travel. In 2014, the company added 79 videoconferencing units and now offers more than 700 in 160 cities. It plans to integrate the technology into other corporate platforms, enabling all employees to use it. The company has established a videoconferencing helpdesk that is available 24 hours a day on weekdays.

66 DEUTSCHE BANK

FRANKFURT

2014 United States-Booked Air Volume: \$67.9 million

2014 Global Air Volume: \$283.7 million

2014 U.S. T&E: \$102.2 million 2014 Global T&E: \$473.5 million

Principal Online Booking Tools: Concur Travel, Sabre GetThere

Principal Expense Supplier: Concur Expense Principal Card Supplier: American Express

Consolidated U.S. TMC: HRG

Deutsche Bank's United States-booked air volume fell modestly in 2014 from \$68.6 million in 2013. The company anticipates a further decrease in travel spending this year, as it sharpens its focus on curbing spend by way of traveler behavior and compliance initiatives.

For example, Deutsche Bank automated pre-trip approval by using a single system across 40 countries last year. It has used pre-trip reporting data to question the necessity of certain trips and reign in discretionary travel. The global banking firm also developed behavior dashboards globally, regionally and locally to support budget holders and manage costs.

The company has strived to maintain traveler service quality while reducing companywide travel spending.

Deutsche Bank travelers book trips using Sabre's GetThere online booking system in the United States. The company's primary online booking system outside the United States varies by country, but Concur Travel and GetThere factor in. The company continues to expand the use of online tools to smaller locations worldwide.

Deutsche Bank uses HRG as its consolidated travel management company in the United States, American Express Global Business Travel in Asia and BCD Travel in Europe.

67 MARSH & MCLENNAN

NEWYORK CITY

2014 United States-Booked Air Volume: \$66 million

2014 Global Air Volume: \$131.4 million

2014 U.S. T&E: \$185 million

2014 Global T&E: \$355 million

Principal Air Suppliers: Delta, United

Principal Hotel Suppliers: Hilton, Marriott, Starwood

Principal Car Rental Suppliers: Enterprise Hertz National

Principal Car Rental Suppliers: Enterprise, Hertz, National Principal Online Booking Tool: Sabre GetThere

Principal Expense Supplier: Oracle iExpense
Principal Card Supplier: American Express
Consolidated Global TMC: BCD Travel

Marsh & McLennan progressed on multiple travel program initiatives in 2014, including the further implementation of its consolidated global travel management company, BCD Travel, and its corporate card, American Express. It continued its efforts to incorporate meetings and events into the global program.

This year, the firm aims to deploy a single global travel policy and to build on the expansions of its corporate card, TMC, and meetings and events programs.

The professional services firm's 2014 United States-booked air volume increased about 3 percent year over year, and its companywide air volume grew about 4 percent year over year. Its 2015 United States-booked air volume is expected to increase another 1.5 percent.

Marsh & McLennan utilizes Sabre's GetThere for bookings inside the United States and other global regions and KDS for bookings in Europe. The company's 12,500 travelers expense travel through Oracle iExpense. Last year, U.S. T&E increased by \$55 million, and firmwide revenue increased about 6 percent to \$13 billion.

67 MORGAN STANLEY

NEWYORK CITY

2014 United States-Booked Air Volume: \$66 million
Consolidated U.S. TMC: American Express Global Business Travel

Financial services giant and investment bank Morgan Stanley spent slightly less on United States-booked air travel in 2014 than it did in 2013, according to a *BTN* estimate.

2014 sales and trading revenue increased to \$32.5 billion from \$31.7 billion in 2013, while expenses outside of interest increased from \$27.9 billion to \$30.7 billion. Leaving aside employee compensation and benefits, noninterest expense increased to \$12.9 billion from \$11.7 billion in 2013. At the end of 2014, Morgan Stanley had 55,800 employees worldwide, almost precisely the total it had the year before.

In 2014, the investment bank announced that it would reimburse employees' use of on-demand car service Uber, taking a clear public stand on a controversial topic among many companies. Uber referred to itself as Morgan Stanley's "preferred transportation platform" in a press release.

Morgan Stanley's companywide environmental policy discourages unnecessary travel in favor of such alternatives as videoconferencing.

HRS - Global Hotel Solutions

A global hotel solutions provider for more than 40,000 corporate customers worldwide, HRS enables companies to achieve cost savings and improve employee satisfaction.

HRS provides corporate customers with tools and services that range from hotel procurement analysis and Request For Proposal (RFP) processes, to booking and distribution platforms, discounted hotel rates to innovative payment solutions. Intelligent end-to-end solutions for conference and group bookings complete the package.

Robust Global Hotel Database

With more than 290,000 hotels in 190 countries, HRS offers corporate customers a large selection of hotels. Included are hundreds of hotel chains, 170,000 privately held hotels and those in all major Global Distribution Systems (GDS) which combined features 5 million rooms. Detailed descriptions, 30,000 videos, millions of photos and guest reviews help to make the HRS database one of the richest.

To ensure complete corporate access to the hotels and rates, HRS integrates with most GDSs, Online Booking Engines (OBEs) and Travel Management Companies (TMCs)

Booking Tech & Custom Portal

Continually updated and available in 32 languages, the HRS booking portal is fully accessible online and from mobile devices.





Bookings also may be made via call 24/7.

HRS offers tailored solutions for corporate customers. For example, a company could use an internal, co-branded booking portal customized with travel polices, price caps and negotiated rates and rely on HRS' Best-Buy functionality to ensure the most economical purchase.

Specially Discounted Rates

Corporate customers also benefit from the HRS Business Tariff, which offers up to a 30 percent discount off the daily online hotel price, as well as such value-adds as Wi-Fi, onsite parking or late check-out, in 40,000 hotels. Multinational corporations that include Airbus Group and Deutsche Post DHL, as well as tens of thousands of small and medium-sized businesses, enjoy these HRS-specific rates. Such purchasing volume allows HRS to negotiate low rates and guarantee lowest prices, all with the flexibility of cancellation until 6 pm on arrival day.

'Intelligent Sourcing' Offers Efficient Hotel Procurement

For large-volume buyers, HRS also offers a range of procurement support services. Drawing on 40 years of market expertise, our large hotel portfolio and comprehensive benchmark information from 40,000 corporate customers, HRS can provide a high level of market transparency.

HRS assists with all steps in the typical hotel sourcing process, including an e-RFP platform that meets the standards of the Global Business Travel Association (GBTA), rate negotiation, data transfer and reporting. Corporations such as BearingPoint, Sika and Dürr AG, which already use the Intelligent Sourcing tool, were able to reduce their negotiated rates by 9 percent on average.

Analytics Drive Savings

Reporting applications provide analysis of traveler movement, booking behavior and overall accommodation costs. A survey of corporate customers has shown that travel expenses are significantly reduced by the consistent use of HRS as a central booking channel: the average savings were 14 percent, regardless of saved process costs.

For reservations and information, visit corporate.hrs.com



69 BAYER

LEVERKUSEN, GERMANY

2014 United States-Booked Air Volume: \$64.3 million

U.S. T&E: \$133.6 million

Principal Air Suppliers: American, Delta, United Principal Hotel Suppliers: Hilton, Marriott

Principal Car Rental Suppliers: Enterprise, National Principal Online Booking Tool: Concur Travel Principal Expense Supplier: Concur Expense

Principal Card Supplier: US Bank Consolidated U.S. TMC: BCD Travel

Bayer's United States-booked air volume rose 5.4 percent year over year in 2014 as the company integrated Merck Consumer Care, which it acquired in October of that year.

The pharmaceutical company also completed a global rollout of Concur's expense program. Concur also supplies the booking tool for Bayer's travelers in the Americas; travelers in Germany book through business travel management system Onesto. About 65 percent of Bayer's United States-booked air in 2014 was made through Concur.

Duty-of-care was another agenda item for Bayer last year, as the company worked with Bayer Medical & Security to develop a pandemic plan.

On the lodging side, Bayer implemented a dynamic pricing program with one major hotel chain last year. This year, the company is conducting a global airlines request for proposals and a corporate card RFP. U.S. travelers pay for expenses on a US Bank-issued MasterCard.

While travel in the United States is consolidated through BCD Travel, the agency is one of several that manage Bayer's travel worldwide, including Carlson Wagonlit Travel and HRG.

This year, Bayer is revising its booking parameters, as well as its traveler-tracking process.

70 ABBOTT LABORATORIES

ABBOTT PARK, ILL.

2014 United States-Booked Air Volume: \$63 million
Principal Expense Supplier: Concur Expense

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

BTN estimates that pharmaceutical and healthcare giant Abbott Laboratories totaled \$63 million in United States-booked air spending in 2014, amid a broad cost-reduction effort and restructuring.

Abbott increased total sales to about \$20.3 billion last year from about \$19.7 billion in 2013. The company's selling, general and administrative expenses, a line item that includes business travel expenditures, increased to \$6.5 billion from \$6.4 billion the prior year. Total expenses increased to \$17.6 billion from \$17.5 billion a year prior.

The company uses Concur for online booking in the United States, as well as many countries in Europe and the Asia/Pacific region. Abbott directs U.S. travelers to use the tool to book all domestic flights, as well as those to Canada and Puerto Rico. Abbott also instructs U.S. travelers to book nonstop round-trip flights to Europe online using Concur.

In September 2014, Abbott continued its expansion overseas with the \$3.4 billion acquisition of Chilean firm CFR Pharmaceuticals.

70 ELI LILLY

INDIANAPOLIS

2014 United States-Booked Air Volume: \$63 million

2014 Global Air Volume: \$140 million

2014 U.S. T&E: \$140 million

2014 Global T&E: \$300 million

Principal Air Suppliers: American, Delta, United
Principal Hotel Suppliers: Marriott, Starwood
Principal Car Rental Suppliers: Enterprise, National
Principal Online Booking Tool: Concur Travel

Principal Expense Supplier: IBM Global Expense Reporting Solutions

Principal Card: US Bank Visa

Consolidated Global TMC: Carlson Wagonlit Travel

Eli Lilly launched several initiatives in 2014 that resulted in cost savings. It consolidated its air program globally and implemented a preferred car service program to reduce expenditures. Additionally, Lilly began using Yapta's FareIQ tool, which allowed it to attain lower-priced flights. All flights booked from locations east of the Mississippi River to Europe now must be booked as coach class instead of business class, in accordance with the pharmaceutical company's travel policy change in 2014. For 2015, it is exploring ways to simplify the booking process while providing a trip within policy.

70 OMNICOM GROUP

NEWYORK CITY

2014 United States-Booked Air Volume: \$63 million

Principal Air Suppliers: American, Delta
Principal Car Rental Suppliers: Budget, Hertz
Principal Online Booking Tool: Concur Travel
Principal Card Supplier: Bank of America

In 2013, marketing and advertising strategic holding company Omnicom announced a merger with *BTN Corporate Travel 100* peer Publicis that would have formed the largest advertising firm in the world. But in May 2014 the companies canceled the merger.

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

BTN estimates Omnicom's United States-booked air spend grew a little more than 3 percent in 2014 from \$61 million in 2013. Revenue grew 5 percent to \$15.3 billion. In 2014, approximately half of Omnicom's revenue came from their 100 largest clients.

Outside the United States, Carlson Wagonlit Travel and BCD Travel are the primary providers of travel management services. In North America and South America, CWT and BCD each handled about half of Omnicom's travel business in 2014. Bank of America continues to serve as Omnicom's preferred U.S. corporate card provider.

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

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



United Airlines

At United Airlines, we are focused on delivering the products, services and tools that you have asked for to help make doing business with us easier, more enjoyable and more productive than ever.



Enabling and Empowering You

Our goal at United Sales is to be "easy to do business

with," and one way we demonstrate this is through our agency self-service tools. In addition to our new more flexible agency rebooking parameters that make it easier for agents to assist our mutual customers, we are excited about development of our new corporate and agency customer website, which is built with you in mind. This new resource will combine the powerful self-service reporting and transactional tools you have been asking for to make it easier and quicker to get the information and services you need.



Relationships Matter

Our sales team is dedicated to building and maintaining a rewarding and productive

relationship with our customers. We aim to be the industry's most visible and accessible Sales force, and we'll spend time with you to make sure that we understand your unique business needs. In conjunction with our dedicated United Executive Accounts Desk and our inside sales support team, we are ready to support you 24/7.



Focusing on Reliability

Our key performance metrics like controllable completion and on-time departure

rates are trending in a positive direction. In some of our largest business markets like New York City and Chicago, United is seeing best-in-class consolidated com-



pletion percentages. We are committed to ensuring that our customers get to their destinations safely and on time, and you will continue to see significant progress on these important goals.



Productivity and Entertainment on the Go

We know you want to stay connected to work, family and friends while on the go, and that

is why we have installed Wi-Fi on nearly 90% of our mainline and large regional aircraft. Additionally, in-seat power is now available on more than 70% of our mainline fleet in the premium cabin and exit row forward, with more planes being updated every day. With our United Private Screening personal device entertainment offering, customers can use their laptop computers or iOS or Android mobile devices to watch movies, TV shows and more. Personal device entertainment is already available on more than 200 mainline aircraft, and we are close

to completing installation on more than 120 regional aircraft.

Our commitment to being flyer friendly means providing you, our valued corporate and travel agency clients, with great service, operational reliability, easy to use technology and ongoing product enhancements. Take a look at what we've done this year, and know that we'll keep working to bring you even better products and service in the future.

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73 BASF

LUDWIGSHAFEN, GERMANY

2014 United States-Booked Air Volume: \$62 million

2014 U.S. T&E: \$132.9 million **2014 Global T&E**: \$140.1 million

Principal Air Suppliers: Delta, United, US Airways

Principal Hotel Suppliers: Hilton, InterContinental, Marriott

Principal Car Rental Suppliers: Avis, Enterprise, Hertz

Principal Online Booking Tool: Sabre GetThere

Principal Expense Supplier: SAP

Principal Card: JPMorgan Chase MasterCard

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

BASF's 2014 United States-booked air volume increased \$1 million from the previous year, and it's expected to increase another \$2 million this year.

The chemical, plastics and agricultural product manufacturer maintained its existing travel policy in 2014 and expects to do so again in 2015.

Its 10,000 business travel employees utilize Sabre's GetThere for online booking inside the United States and Concur Travel elsewhere. Of BASF's 2014 United States-booked air volume, 77 percent was reserved online, and 82 percent of those required no agent assistance.

In the United States, BASF uses corporate cards issued through JPMorgan Chase and SAP as its global expense system.

American Express Global Business Travel serves as BASF's consolidated U.S. agency, while business is split between American Express GBT and Carlson Wagonlit Travel globally. The company also uses BCD Travel in Canada.

Company sales in 2014 totaled $\ensuremath{\mathfrak{C}}$ 74.3 billion, up from $\ensuremath{\mathfrak{C}}$ 74 billion in 2013.

73 UNITEDHEALTH GROUP

MINNETONKA, MINN.

2014 United States-Booked Air Volume: \$62 million Consolidated Global TMC: BCD Travel

In 2014, healthcare firm UnitedHealth Group decreased its United States-booked air spending about 3 percent compared with 2013 levels. The travel program expects that volume to increase to \$73 million in 2015.

The company reported \$130.5 billion in global revenue in 2014, up from \$122.5 billion in 2013. As of December 31, 2014, UnitedHealth Group employed approximately 170,000 people, up from 156,000 in 2013. BCD Travel continues to serve UnitedHealth Group's 40,000 business travelers inside and outside the United States.

75 JOHNSON CONTROLS

MILWAUKEE

2014 United States-Booked Air Volume: \$60 million 2014 Global Air Volume: \$120 million 2014 U.S. T&E: \$212.5 million 2014 Global T&E: \$250 million

Principal Air Suppliers: Delta, Southwest, United
Principal Hotel Suppliers: Hilton, InterContinental
Principal Car Rental Suppliers: Avis, Enterprise, National
Principal Online Booking Tool: American Express Online/Concur

Principal Expense Supplier: Infor Extensity

Principal Card Supplier: US Bank

Consolidated Global TMC: American Express Global Business Travel except for Latin America and the Caribbean, which are not consolidated

Manufacturing company Johnson Controls maintained its \$60 million United States-booked air volume from 2013 to 2014 and expects to do the same in 2015. Its travelers number 25,000. Of tickets booked in the United States, 85 percent were for domestic travel.

In 2014, it rolled out a pre-trip approval process aimed at out-of-policy travel. During the year, 88 percent of plane tickets bought in the United States were made through approved online tools, and 90 percent of those were made without agent assistance. It also expanded to 15 the number of European, Middle Eastern and African markets that are online. Additionally, Johnson Controls continued to consolidate its Asia/Pacific travel management companies.

As far as policy changes, the company allowed road warriors traveling between North America and Europe to fly business class. Overall, the company's travel program achieved \$9 million in incremental savings in 2014.

It has completed global credit card and car rental requests for proposals and will consolidate with Citi for corporate cards and Enterprise/National and Europear for car rentals. It also established a European Union travel servicing hub via American Express Global Business Travel in Barcelona. Still on its to-do list: finalizing an Asia/Pacific meetings and events strategy. The company also is looking into ridesharing companies like Uber and Lyft.

Johnson Controls has one global travel policy and an individual bill, central pay card program. It uses Infor Extensify for expense reporting around the world and Amadeus e-Travel Management for booking outside the United States.

75 CATERPILLAR

PEORIA, ILL.

2014 United States-Booked Air Volume: \$60 million 2014 Global Air Volume: \$102 million

Consolidated Global TMC: BCD Travel

United States-booked sales and revenue for construction and heavy equipment manufacturer Caterpillar declined slightly from \$55.7 billion in 2013 to \$55.2 billion. Increases in the energy and transportation and construction segments nearly offset sales declines in resource industries.

Operating profit declined from \$5.6 billion in 2013 to \$5.3 billion in 2014, owing to weak economic growth in many parts of the world and lower global commodity prices.

BTN estimates that 2014 United States-booked air volume was \$60 million. That does not represent a decline from 2013 spending but rather a more informed estimate this year. Companywide air volume for 2013 also adjusted to \$102 million from \$110 million.

Global employees decreased from 118,501 in 2013 to 114,233 in 2014. More than 51,000 of them were based in the United States.

Starwood's Sheraton Hotels & Resorts

In one of its largest brand redevelopment efforts, Starwood Hotels & Resorts has launched Sheraton 2020, a bold, all-emcompassing, 10-point plan to put "Sheraton back on its rightful pedestal as a global hotel brand of choice, everywhere," according to Adam Aron, Starwood CEO on an interim basis.

"Sheraton is Starwood's largest, and most global brand with a nearly 80-year history as a pioneer and true beacon of hospitality," Aron said. "With Sheraton 2020, we are marshalling the formidable might, muscle and creativity of our organization, which has famously distinguished itself as the industry's premier brand builder and innovator."

New Hotels, Grand Tier

Sheraton Grand, a new premier tier that recognizes exceptional Sheraton hotels and resorts for their enticing destinations, distinguished designs, and excellence in service and guest experiences, will welcome 50 designated hotels by the end of 2015, and is projected to have 100 total by early 2017. In addition, by 2020, 150 new Sheraton hotels are expected to open worldwide in key locations through conversions, adaptive re-use and new build projects.

Excellence In Service Delivery

There will be a "maniacal and consistent focus on excellence in service delivery, including cleanliness, condition of rooms and





responsiveness to guests," according to company officials. The brand is reinvigorating its associate training, and seeking to create a consistent experience at each and every one of its properties around the world.

Innovative Guest Offerings

As part of Sheraton 2020, the brand also wants to "unleash the potential of Sheraton Club," continuing to evolve and advance this exclusive offering available at most Sheraton properties where Club guests can gain access to upgraded amenities and services. The Sheraton guest expereince also will include unique and imaginative lobby programming, premium sleep, upgraded entertainment options, fitness and bath experiences, as well as innovative food and beverage offerings.

#PairedPerfectly

Sheraton has reinvigorated its lobby bar experience with the launch of "Paired," a new food and beverage program comprised of artisanal small plates and eclectic bar snacks served alongside suggested premium wines and local craft beers. The new Paired menus are offered daily at Sheraton properties globally.

Marketing And Brand Positioning

A \$100 million marketing campaign will

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

Work Smarter, More Efficiently

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

To learn more about the new Sheraton, visit Sheraton.com





75 STRYKER

KALAMAZOO, MICH.

2014 United States-Booked Air Volume: \$60 million Consolidated U.S. TMC: BCD Travel

BTN estimates 2014 United States-booked air volume at medical device and technology firm Stryker increased slightly from 2013. The company's 2014 net sales increased about 7.3 percent year over year to about \$9.7 billion, and net earnings dipped by \$490 million to \$515 million.

Like many medical technology companies, Stryker operates a mature strategic meetings management program and has expanded it to more than a dozen countries in Europe.

Stryker had about 26,000 employees worldwide at the end of 2014, about 1,000 more than a year earlier.

78 FIDELITY INVESTMENTS

BOSTON

2014 United States-Booked Air Volume: \$59 million

2014 Global Air Volume: \$68 million 2014 Global T&E: \$200 million

Principal Air Suppliers: American, Delta, JetBlue Principal Hotel Suppliers: Hilton, Marriott, Starwood Principal Car Rental Suppliers: Enterprise, National Principal Online Booking Tool: Orbitz for Business

Principal Expense Supplier: Oracle
Principal Card Supplier: American Express
Consolidated U.S. TMC: BCD Travel, Orbitz for Business

Financial services company Fidelity Investments completed global requests for proposals for air and car rental in 2014, resulting in more global air partners, as well as car rental providers National and Enterprise.

The firm deployed an analytics tool with travel dashboards and held its first virtual travel fair, in which vendors exhibited products through blogs on Fidelity's internal social media community.

Both BCD Travel and Orbitz for Business are Fidelity's travel agencies in the United States and were responsible for booking 64 percent of Fidelity's United States-booked air volume in 2014. Fidelity uses BCD, Swire Travel, Hillgate and JTB-CWT abroad. This year, Fidelity plans to consolidate from six travel management companies to three, one for North America and Asia/Pacific, one for India and one for Europe. Fidelity uses Orbitz for Business to book travel and in October will implement Concur Travel in Ireland.

United States-booked air volume rose from \$57 million in 2013 to \$59 million in 2014.

79 SCHLUMBERGER

PARIS

2014 United States-Booked Air Volume: \$58 million
Consolidated U.S. TMC: American Express Global Business Travel
BTN estimates that oil field services firm Schlumberger further

decreased its United States-booked air volume from 2013 to 2014. The company's 2014 revenue increased 7.3 percent to \$48.6 billion, and income from continuing operations declined \$1.2 billion to \$5.6 billion.

In 2014, Schlumberger embarked on an initiative to consolidate travel management company services on a regional basis. American Express Global Business Travel now is the company's primary agency in the United States and elsewhere, though other TMCs handle some company locations.

The company employs about 108,000 people. In 2015, Schlumberger has reduced its workforce by about 20,000 in two separate rounds of reductions.

79 THOMSON REUTERS

NEWYORK CITY

2014 United States-Booked Air Volume: \$58 million

2014 Global T&E: \$250 million

Principal Air Suppliers: American, British Airways, Delta Principal Hotel Suppliers: Hilton, Marriott, Starwood Principal Car Rental Suppliers: Enterprise, Hertz, National

Principal Online Booking Tool: Concur Travel

Principal Expense Supplier: Infor

Principal Card Supplier: American Express
Consolidated Global TMC: Carlson Wagonlit Travel

Media conglomerate Thomson Reuters reduced costs from 2013 to 2014 as a result of changes put into place previously. The company, successfully consolidated to one travel management company, Carlson Wagonlit Travel in April 2012 and has been working on driving online booking compliance and outsourcing meeting planning activities.

In 2014, Thomson Reuters also reaped the benefit of altering its travel policy for permissible business-class air booking to eight hours of flight time from six hours during the previous year. Also helping to manage demand, the company continued to mandate that travelers receive pre-approval for international trips and use remote conferencing rooms for internal staff meetings. The company also kept a \$350 daily cap on hotel expenses, requiring approval for higher spending.

79 VERIZON COMMUNICATIONS

NEWYORK CITY

2014 United States-Booked Air Volume: \$58 million

2014 Global T&E: \$326 million

Principal Air Suppliers: American, Delta, United Principal Hotel Suppliers: Hilton, Marriot, Starwood Principal Car Rental Suppliers: Avis, Enterprise, National

Principal Online Booking Tool: Sabre GetThere

Principal Expense Supplier: SAP

Principal Card Supplier: American Express

Consolidated Global TMC: American Express Global Business Travel

In 2014, Verizon Communications put in place more travel restrictions, including implementing pre-trip approval. It also rolled out an online booking tool in Europe and consolidated its wireline phone and Internet

South African Airways

When travelling to Africa for business, there is no better choice than the airline that knows Africa best, South African Airways (SAA). With over 80 years of service and the most flights to South Africa from the U.S., business travelers receive world-class service and an extraordinary experience as they fly from North America to Africa.





SAA is the only carrier to offer daily nonstop service from New York–JFK to Johannesburg and nonstop service from Washington D.C.– Dulles to Dakar, Senegal, or Accra, Ghana, with continuing service to Johannesburg.

From its hub in Johannesburg, SAA together with our regional partners SA Express, Airlink, and Mango offers easy, seamless connections to more than 55 destinations throughout Africa, including Cape Town, Durban, Kruger National Park, Livingstone, Maputo, Windhoek and Luanda, just to name a few.

South African Airways also provides convenient flights from the USA to East Africa. Our daily flight from New York's John F. Kennedy International Airport to Johannesburg provides convenient connections to Nairobi, Kenya, and Dar es Salaam, Tanzania, which result in mid-afternoon arrivals, right on time for a

nice early dinner and a good night's sleep, before starting off the next morning.

Only The Best For Our Passengers

With a 5-star sleep rating by Skytrax, SAA's 180° lie-flat bed, with a 73-inch pitch, cozy duvet and fluffy pillows, ensures Premium Business Class passengers will get a good night's rest. A built-in massage function enhances guest comfort in any seat position. All SAA international flights feature four main course options, suited for travelers in the mood for either a healthy or a hearty meal, paired with the finest award-winning South African wines.

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South African Airways is the only



Skytrax 4-Star rated airline flying between North America and Africa, and won the "Best Airline in Africa" Skytrax Award for the 13th consecutive year in 2015.

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Customers can earn and redeem rewards on United's and Air Canada's frequent flier programs. Our code share flights with JetBlue Airways offer connections on flights between 18 cities in the U.S. and South Africa, via our gateways in New York and Washington D.C.

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business to American Express Global Business Travel. United Statesbooked air volume in 2014 was \$58 million, and the company expects it to be relatively flat in 2015. Consolidated revenue for 2014 was \$127.1 billion, and as of the end of 2014, it had about 177,300 employees.

82 FORD MOTOR CO.

DEARBORN, MICH.

2014 United States-Booked Air Volume: \$57.8 million

2014 Global Air Volume: \$139.7 million

2014 U.S. Air, Hotel & Car Volume: \$86.5 million 2014 Global Air, Hotel & Car Volume: \$217.1 million Principal Air Suppliers: Delta, Southwest, United

Principal Hotel Suppliers: Hampton Inn, Holiday Inn, Marriott

Principal Car Rental Suppliers: Avis, Budget, Hertz **Principal Online Booking Tool:** Concur Travel

Principal Card Supplier: Citi

Consolidated Global TMC: American Express Global Business Travel

Ford Motor's United States-booked air volume nudged upward from \$57.2 million in 2013 to \$57.8 million in 2014, and the company expects that figure to stay flat in 2015. Its travel has diminished, but its travel costs are on the rise, thanks to more international trips. Increased travel to the Middle East and Africa also has led to a more comprehensive safety and security program for travelers.

The company is refining its pre-trip approval process and hopes to deploy a global platform in 2016. As airlines continue to develop ancillary products, Ford is weighing how its policy should address booking options like restrictive fares, seat assignments, premium coach and other add-ons that are not easily visible within traditional booking tools. The company also is considering other methods to guarantee that full content is available to travelers as they shop for managed travel products.

Outside the United States, its primary air carriers are Delta, Emirates and Lufthansa and its primary hotels are Hyatt, Holiday Inn and Marriott.

83 BARCLAYS

LONDON

2014 United States-Booked Air Volume: \$57 million

Barclays significantly trimmed travel spending in 2014 as the financial services company focused on cutting costs and carbon emissions.

The firm spent £213 million (about \$331 million using the Dec. 31, 2014, exchange rate) in travel and accommodation costs in 2014, a decrease of more than 30 percent compared with 2013 levels. As such, *BTN* estimates Barclays cut United States-booked air by similar levels to \$57 million.

Barclays had set a target to reduce carbon emissions by 10 percent against 2012 levels by 2015. It exceeded that a year early, attaining a 21.7 percent reduction in 2014, thanks in part to policies that streamlined travel. In addition, the firm controls costs through a cloud-based reporting system for travel management company data, supplier contracts, service-level agreements and human resources data. That system provides data to Barclays' various businesses so they can understand their spending, monitor traveler behavior and analyze contracts.

The tool also can monitor the length of stay of Barclays travelers in countries outside their residency for tax liability purposes.

83 EBAY

SAN JOSE, CALIF.

2014 United States-Booked Air Volume: \$57 million

Principal Online Booking Tool: Deem

Principal Expense Supplier: Concur Expense

Principal Card Supplier: AirPlus

Consolidated Global TMC: Carlson Wagonlit Travel

BTN estimates that online commerce giant eBay increased its United States-booked air volume from the previous year by \$2 million from \$55 million in 2013. The company formally split PayPal off as a separate entity in July 2015.

The split was announced last September, and the company has been creating separate organizations and travel programs but has not made any significant changes to its supplier relationships in the interim. It continued to use a special book-to-bill hotel report it created in 2013, which includes agency and expense system data, to give the company better insight and enhanced negotiating leverage.

The company used Carlson Wagonlit Travel to provide travel management services throughout the United States and in 31 other countries. In addition to using CWT for travel management company services, eBay also used its consulting arm, including Carlson Air Solutions. It continued using International SOS for traveler security services.

Ebay also has been using Deem for its online booking tool in the United States, where adoption is above 50 percent. Outside the United States, the company continued to select best-in-class online tools depending on the individual market.

The company used Concur as its expense tool for at least 95 percent of the globe. It used an AirPlus ghost card for airline purchases and the AirPlus MasterCard for other expenses.

Ebay employed more than 22,000 people in the United States and 34,600 people globally in 2014, up from 31,500 in 2012. The company increased net revenue 12 percent to \$17.9 billion in 2014, up from \$16 billion in 2013.

83 INTERPUBLIC GROUP

NEWYORK CITY

2014 United States-Booked Air Volume: \$57 million

2014 Global Air Volume: \$93 million

2014 U.S. T&E: \$239 million

2014 Global T&E: \$317 million

Principal Air Suppliers: American, Delta, United

Principal Hotel Suppliers: Four Seasons, Kimpton, Marriott

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

Principal Online Booking Tools: Amadeus e-Travel Management,

Concur Travel

Principal Expense Suppliers: Concur Expense, SAP

Principal Card Supplier: American Express

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

Interpublic Group increased its United States-booked air spending by nearly 9 percent from \$52.6 million in 2013, while companywide air volume rose only \$2 million from the previous year. Meanwhile, companywide T&E increased nearly 6 percent from 2013.



The advertising holding company continued the implementation of its multinational program in 2014, adding Canada and establishing online booking in both Canada and China. IPG also integrated its PeopleSoft human resources data feed for traveler profiles in Europe, the Middle East, Africa and the Asia/Pacific region.

The company last year issued corporate cards to those travelers previously without them and identified and qualified opportunities to centralize new markets within the global travel and credit card program.

IPG increased the level of compliance with its preferred hotels in EMEA, APAC and Latin America and assessed a hotel open booking and gamification strategy to further drive compliance with preferred hotels and capture data for those who book nonpreferred hotels. The company also is evaluating the prospects of employing social media to advance its travel program goals.

Last year, IPG, which has been working to protect both intellectual and personal employee data privacy, began requiring suppliers to indemnify the company with \$10 million in the case of a data breach.

This year, the company is looking to grow its strategic meetings management program and sourcing process by transitioning from third parties to internal staff. It is in the process of improving performance of its current Access Solution by porting its global ticket database to a SQL server. IPG also is looking to improve travel management company operations in EMEA and India and is reviewing prospects for improving travel program services in Latin America. At the same time, the company is exploring a method to capture the variance between hotel credit card spending and the hotel data collected by its travel management company service providers.

American Express Global Business Travel is the company's consolidated TMC inside the United States and is the primary agency in Latin America and the Asia/Pacific region; HRG is primary in EMEA. IPG travelers use Concur to book travel online in the United States and Amadeus e-Travel Management in EMEA. Interpublic's nearly 27,000 travelers report their expenses via Concur in the United States and Concur or SAP outside the country.

86 TOYOTA MOTOR SALES U.S.A.

LOS ANGELES

2014 United States-Booked Air Volume: \$56.3 million

Principal Air Suppliers: American, Delta, United

Principal Hotel Suppliers: Hilton, InterContinental, Marriott, Starwood

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

Principal Online Booking Tool: Sabre GetThere

Principal Expense Supplier: IBM Global Expense Reporting Solutions

Principal Card Supplier: American Express

Consolidated U.S. TMC: BCD Travel

Toyota Motor Sales U.S.A—the sales, marketing, and distribution subsidiary devoted to the U.S. market—increased its 2014 United States-booked air volume 9 percent. It expects to grow its volume another 11 percent this year.

In 2014, the company announced it would move its headquarters from the Los Angeles area to Plano, Texas. Its travel department arranged for thousands of employees to travel to Texas for introductory visits. The program negotiated \$5 million in savings for the organization within the seven months of its site visits. It also added more hotels into its program during 2014.

Last year, the company aligned under a single travel policy with Toyota Manufacturing, Toyota Financial Services and Toyota affiliates. In 2015, the travel program aims to reduce ticket exchanges and drive online booking. It also is emphasizing training and education for its travelers and administrators to enhance compliance.

TMS's 12,500 business travelers use Sabre's GetThere for online bookings. The company is switching its expense provider from IBM Global Expense Reporting Solutions to Chrome River in October 2015. American Express provides the company's corporate cards.

87 21ST CENTURY FOX

NEW YORK CITY

2014 United States-Booked Air Volume: \$55 million
Principal Air Suppliers: American, British Airways, Delta
Principal Hotel Suppliers: Hilton, Marriott, Starwood
Principal Car Rental Suppliers: Enterprise, Hertz, National
Principal Online Booking Tool: Sabre GetThere
Principal Expense Suppliers: Concur Expense, PeopleSoft
Principal Card Supplier: American Express
Consolidated U.S. TMC: HRG

Media giant 21st Century Fox increased its 2014 United Statesbooked air volume by 7 percent from the previous year.

The company renegotiated all its airline deals and reduced its volume of first-class travel in 2014. This year, the company plans to renegotiate its car rental, corporate card and online booking tool agreements and implement virtual payments. It is also focused on increasing corporate card enrollment and extending its travel program globally.

HRG handles the company's business in the United States and the United Kingdom, and country-specific travel management companies assist travelers elsewhere.

Employees book travel through Sabre's GetThere in the United States. In 2014, 85 percent of airline tickets that could be booked online in the United States were booked through the tool, 71 percent of which required no agent assistance.

Both Concur and PeopleSoft provide expense reporting services and American Express provides corporate cards.

87 CREDIT SUISSE

ZURICH

2014 United States-Booked Air Volume: \$55 million

Consolidated Global TMC: American Express Global Business Travel

BTN estimates that Credit Suisse's United States-booked air volume fell slightly from 2013 to \$55 million last year. The company reported \$356.7 million in worldwide travel and entertainment expenses for 2014. Overall general and administrative expenses, represented in Swiss francs, fell 3 percent year over year on a constant currency basis. Among administrative expense movers, the company cited slightly lower T&E expenses, according to its annual report.

According to Credit Suisse's 2014 Corporate Responsibility Report, 25 percent of the global banking firm's greenhouse gas emissions stem from business travel. The company has taken actions to limit and mitigate the environment impact of employee travel. For example, Credit Suisse requires train travel for applicable short-haul travel and encourages remote conferencing instead of business trips in some situations.

Companywide usage of videoconferencing rooms rose 26 percent to 173,362 hours in 2014. The company also reported that desktop videoconferencing rose. When there is no alternative to flying for business, the company purchases emission-reduction certificates to offset air travel emissions. Last year, the company offset roughly 56,000 metric tons of greenhouse gas emissions through such certificates, which were used to fund wind power, hydropower, geothermal power and other emerging clean energy projects.

In 2014, full-time-equivalent employees fell 3 percent to 45,800. 2014 net revenue rose 8 percent year over year to \$26 billion.

Credit Suisse, which operates in more than 50 countries, implemented Concur's online booking and expense management systems worldwide in 2013.

89 PHILIPS

AMSTERDAM

2014 United States-Booked Air Volume: \$54 million

2014 Global Air Volume: \$155 million Principal Air Supplier: SkyTeam

Principal Hotel Suppliers: AccorHotels, Best Western,

Hilton, InterContinental

Principal Car Rental Supplier: Hertz

Principal Online Booking Tools: Sabre GetThere, Traveldoo

Principal Expense Supplier: Concur Expense **Principal Card Supplier:** American Express

Consolidated Global TMC: American Express Global Business Travel In 2014, electronics and technology firm Philips offset travel pricing increases with cost-savings measures that BTN estimates held United States-booked air volume flat for 2014.

To garner cost savings in 2014, the company began revising its policy to encourage connections versus nonstop flights and continued to implement a global meetings program it initiated the year before.

It negotiated for a global car rental provider and began efforts to bid out its travel management company contract. Those efforts were put on hold, however, in light of a September 2014 announcement that Philips planned to sharpen its strategic focus by establishing two stand-alone companies focused on the HealthTech and Lighting opportunities.

To achieve this transformation, Philips began integrating its Consumer Lifestyle and Healthcare divisions into one operating company on Jan. 1, 2015. The establishment of the two stand-alone companies also will involve the split and allocation of the current Innovation, Group & Services sector to each company in 2015.

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

Sales revenue for the company declined slightly from €22 billion

in 2013 to €21.4 billion in 2014. Philips also reduced employee headcount from 116,082 in 2013 to 113,678 in 2014.

90 intel

SANTA CLARA, CALIF.

2014 United States-Booked Air Volume: \$53.5 million

2014 Global Air Volume: \$102 million

Principal Air Suppliers: Southwest, United, US Airways Principal Hotel Suppliers: Courtyard, Holiday Inn, Marriott Principal Car Rental Suppliers: Avis, Hertz, National Principal Online Booking Tool: Sabre GetThere **Principal Card Supplier:** American Express

Consolidated Global TMC: American Express Global Business Travel

Technology company Intel in 2014 decreased its United Statesbooked air volume by nearly 25 percent to \$53.5 million, primarily owing to a corporate directive to reduce travel, as well as an ongoing open booking policy, which was first implemented in 2013. However, Intel has since loosened its directive and expects U.S. air volume to pick back up to \$62.2 million for 2015.

American Express Global Business Travel is Intel's dominant travel agency, but Intel also uses two different companies, one in Israel and one in Japan. Other principal global suppliers include Sabre's GetThere for online booking and Concur for expense.

In 2014 Intel improved its program's health by increasing its level of service and customer satisfaction goals and metrics and by consolidating its program. Goals for this year include implementing more integrated solutions, like expense and booking and evolving its technology stack, including making more mobile apps available to travelers. It will also continue enhancing the travel experience.

91 PUBLICIS GROUPE

PARIS

2014 United States-Booked Air Volume: \$53.1 million

2014 U.S. T&E: \$74.9 million

Principal Air Suppliers: American, Delta Principal Hotel Supplier: Sheraton

Principal Car Rental Suppliers: Avis, Budget

Principal Online Booking Tool: American Express Global Business

Travel's Axiom

Principal Card Supplier: American Express

Consolidated Global TMC: American Express Global Business Travel

Advertising and public relations firm Publicis in 2014 consolidated more advertising agencies into its program with American Express Global Business Travel, resulting in higher air spend. United States-booked air volume for 2014 totaled \$53.1 million, up from 2013's \$51 million. American and Delta account for about 85 percent of Publicis' volume.

The advertising firm doesn't use a singular expense management tool in North America, but it's transitioning users of IBM Global Expense Reporting Solutions and Concur Expense to its new SAP expense tool in waves.

The long proposed merger with BTN Corporate Travel 100 peer

Omnicom ultimately dissolved in 2014, but Publicis remains in acquisition mode. This year, it added 2,000 employees to its travel program from its acquisitions of digital shop Rosetta, and other, smaller agencies. In February, it also acquired marketing and consulting firm Sapient, which Publicis expects will add another \$22 million in airfare.

Publicis now has 25,000 employees, of which 20,000 have travel profiles, up from 21,000 employees and 18,000 travel profiles, last year.

Publicis' online booking adoption rate remains at 95 percent. Its average ticket price and room rates decreased 6 percent and 3 percent, respectively.

Publicis continued its efforts to enforce videoconferencing and has incorporated the option in its pre-trip approval process.

92 ILLINOIS TOOL WORKS

GLENVIEW, ILL.

2014 United States-Booked Air Volume: \$53 million

2014 Global Air Volume: \$80 million

2014 U.S. T&E: \$115 million **2014 Global T&E**: \$160 million

Principal Air Suppliers: Delta, United

Principal Hotel Suppliers: Hilton, InterContinental, Marriott Principal Car Rental Suppliers: Enterprise, Hertz, National

Principal Online Booking Tool: Concur Travel
Principal Expense Supplier: Concur Expense
Principal Card Supplier: American Express

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

Manufacturing company Illinois Tool Works' United States-booked air volume rose a modest \$2 million to \$53 million from 2013 to 2014, and that's where it and its 20,000 travelers likely will stay for 2015. Seventy percent of the United States-booked traffic went abroad.

In 2014, it consolidated 24 countries to a European travel hub. While it consolidates activity through American Express Global Business Travel in the United States, it uses many more elsewhere, though Amex GBT is the primary. ITW does, however, use a single global policy.

Of tickets booked in the United States, 90 percent went through approved online channels, and of those, 90 percent were completed without the help of an agent. It's card program is individual bill, individual pay.

In 2015, the company is deploying T&E service in Brazil and six Asia/Pacific countries. It's greatest challenge: reporting savings so they're accepted as incremental rather than registered as cost avoidance.



93 EMERSON ELECTRIC

FERGUSON, MO.

2014 United States-Booked Air Volume: \$52 million Principal Car Rental Suppliers: Enterprise, National Principal Online Booking Tool: Sabre GetThere **Principal Card Supplier:** American Express

BTN estimates manufacturing and engineering conglomerate Emerson Electric spent \$52 million in United States-booked air in 2014, a decrease from 2013 levels.

Both American Express Global Business Travel and Carlson Wagonlit Travel handle its program globally. The company uses American Express as a corporate card supplier, and travelers book through Sabre's GetThere portal.

Sales declined 1 percent in 2014, and Emerson sold computing and power business Artesyn. Sales were up across four of the company's five operating segments.

Emerson reported an average of 115,100 employees during its 2014 fiscal year, which ended Sept. 30, 2014. That was down from 131,600 employees the previous fiscal year.

4 3M

ST. PAUL, MINN.

2014 United States-Booked Air Volume: \$51.5 million

2014 Global Air Volume: \$72.3 million

2014 U.S. T&E: \$138.5 million 2014 Global T&E: \$225 million Principal Air Supplier: Delta

Principal Hotel Supplier: Hilton, Marriott **Principal Car Rental Supplier: National** Principal Online Booking Tool: Sabre GetThere **Principal Expense Supplier:** PeopleSoft

Principal Card: Citi MasterCard

Consolidated U.S. TMC: Carlson Wagonlit Travel

Manufacturing company 3M increased its United Statesbooked air volume almost 14 percent in 2014. That growth is expected to drop off this year, as the company anticipates only a 1 percent increase in volume during 2015.

Last year, 3M stabilized the deployment of its global SAP Travel Request, and it enhanced processes with its global travel management companies. Moving forward, the company aims to increase consolidation of its TMCs and to implement a global expense solution.

Carlson Wagonlit Travel services 3M's 15,000 business travelers in the United States, Canada and most European countries, alongside several other TMCs globally.

Travelers book air tickets online through Sabre's GetThere in the United States and Canada. Amadeus e-Travel Management is used in European countries serviced by CWT. Eighty percent of U.S. bookings went through GetThere, 50 percent of which required no agent assistance.

The company's expense reporting business is divided among country-specific providers. SAP services six countries and PeopleSoft handles the United States. Citi MasterCard provides corporate cards in the United States and Canada.

The travel program's greatest challenge is duty of care and consolidating data from its multiple TMCs.

As of Dec. 31, 2014, 3M employed approximately 90,000 people. The company's total revenue last year fell 3.2 percent

4 MCKESSON

SAN FRANCISCO

2014 United States-Booked Air Volume: \$51.5 million Principal Air Suppliers: American, Delta, United

Principal Hotel Suppliers: Hilton, InterContinental, Marriott Principal Car Rental Suppliers: Avis, Hertz, Enterprise

Principal Online Booking Tool: Concur Travel

Principal Expense Supplier: SAP

Principal Card Supplier: American Express

Consolidated Global TMC: American Express Global Business Travel

McKesson increased its United States-booked air volume 8.5 percent in 2014. This year, it expects volume to increase almost 9 percent to \$56.1 million.

Last year, the pharmaceutical company improved its advancedbooking behavior by ensuring travelers booked flights 14 to 20 days in advance.

This year, McKesson hopes to improve the flexibility of its travel program and introduce the use of industry disruptors.

The company made no major changes to its travel policy in 2014. In 2015, it hopes to alter its policy around international airfare and hotel compliance.

American Express Global Business Travel serves as the company's consolidated global travel management company.

McKesson's 11,000 business travelers book online through Concur Travel. Ninety-four percent of U.S. air tickets were booked through the tool, 90 percent of which required no agent assistance.

American Express provides corporate cards, set up in an individual bill, central pay configuration. Travelers report expenses through SAP both inside the United States and elsewhere.

96 AMGEN

THOUSAND OAKS, CALIF.

2014 United States-Booked Air Volume: \$51.2 million

2014 Global Air Volume: \$82.3 million

Principal Air Suppliers: Delta, Southwest, United Principal Hotel Suppliers: Hilton, Hyatt, Marriott

Principal Car Rental Supplier: Hertz

Principal Online Booking Tool: Concur Travel **Principal Expense Supplier:** Concur Expense **Principal Card Supplier:** American Express Consolidated Global TMC: Carlson Wagonlit Travel

Pharmaceutical and biotechnology firm Amgen implemented a new global travel policy in 34 countries last year and worked to realign and standardize global travel reporting.

In October 2013, the company completed its \$9.7 billion acquisition of California-based Onyx Pharmaceuticals. Last year, Amgen worked

to integrate the acquisition into its travel program. This year, Amgen has focused on global program management and travel, card and expense data integration and analysis.

Last year, it deployed a new expatriate and relocation process for employees and incorporated corporate dining network Dinova into its program to address meal spending.

The company has made some airline policy tweaks in the past year, including a 14-day advance purchase policy and a modified premium-class travel policy.

Concur Travel has served as Amgen's preferred booking tool in the United States, though the company also used Amadeus e-Travel Management in other countries last year.

This year, Amgen has moved to consolidate online booking services with Concur worldwide. It also used Concur Expense on a global basis.

97 BOSTON SCIENTIFIC

MARLBOROUGH, MASS.

2014 United States-Booked Air Volume: \$50.3 million 2014 Global T&E: \$235 million Principal Air Suppliers: Delta, United Principal Hotel Suppliers: Hilton, Marriott, Starwood

Principal Car Rental Supplier: Hertz

Principal Online Booking Tools: Concur Travel, KDS

Principal Expense Supplier: Concur Expense

Principal Card Supplier: Citi

Consolidated Global TMC: American Express Global Business Travel

Boston Scientific is deepening its global approach to travel management in partnership with its consolidated agency, American Express Global Business Travel, and with booking/expense supplier Concur.

In 2014, the medical solutions supplier expanded its use of Concur Travel in Europe, where KDS had been the primary booking tool, and implemented Concur Expense in Asia. As of the first half of this year, Concur was the company's global expense platform.

Boston Scientific also broadened the reach of American Express GBT last year, moving its Australia operations under both the travel management company and Concur Travel.

Additionally, Boston Scientific conducted a benchmarking exercise for its global travel policy and determined that it has a strong, comprehensive policy in place with clear guidelines for booking and expensing travel.

This year, the company is enhancing compliance metrics and creating an auditing process to boost compliance among its approximately 11,000 travelers. It also has issued global guidelines

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for meetings and events and launched a meetings registration and approval tool, which collects data to give better visibility to those managing meetings spending.

In addition, Boston Scientific is addressing hotel compliance in policy this year, adding language to instruct employees to book preferred properties close to company sites versus downtown locations.

The company's United States-booked air volume increased 4.8 percent year over year to \$50.3 million. Companywide T&E spending increased 3.5 percent to \$235 million.

98 ALLSTATE INSURANCE CO.

NORTHBROOK, ILL.

2014 United States-Booked Air Volume: \$50 million

2014 U.S. T&E: \$187 million

Principal Air Suppliers: Delta, Southwest, United

Principal Hotel Suppliers: Hilton, InterContinental, Marriott

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

Principal Online Booking Tool: Concur Travel

Principal Card: Citi MasterCard

Consolidated U.S. TMC: Travel and Transport

Allstate Insurance Co. introduced a formal duty-of-care program worldwide in 2014 and launched compliance tools for budget holders and travelers to better guide and monitor buying decisions. The Illinois-based insurance company launched a new employee travel portal and social networking site. It also introduced a new hotel rebooking service in conjunction with its travel management company to search and reserve lower rates post-booking.

Early in 2015, Allstate launched a new travel policy, which addresses ancillary airline purchases and offers guidance around sharing economy suppliers.

Travel and Transport is Allstate's preferred TMC in the United States, and Travel and Transport's Radius Travel partners provide travel management services in other countries.

This year, the company plans to launch a cloud-based expense system, roll out chip-and-pin corporate cards and embark on the framework for a strategic meetings management program, set to launch in 2016.

99 CARGILL

WAYZATA, MINN.

2014 United States-Booked Air Volume: \$47.5 million

2014 Global Air Volume: \$88 million

2014 U.S. T&E: \$150 million 2014 Global T&E: \$330 million

Principal Air Suppliers: American, Delta, United

Principal Hotel Suppliers: Hilton, InterContinental, Starwood

Principal Car Rental Supplier: Enterprise Holdings
Principal Online Booking Tool: Sabre GetThere
Principal Expense Supplier: Expense Express
Principal Card Supplier: American Express
Consolidated Global TMC: BCD Travel

Last year, Cargill increased its United States-booked airline volume by \$1 million from 2013 to 2014. and the company intends to reduce that amount by half a million dollars by the end of 2015.

Key to Cargill's efforts to manage its demand has been a mandatory traveler training program initiated last year to help travelers understand travel policies and why they should adhere. The company also has focused on reducing the total costs of its trips, and it continues to work this year on training its travelers to comply with its travel policies.

The company did not make any travel policy changes last year, but in 2015, it is working on implementing a policy for corporate meetings.

Cargill has a single travel policy globally. While more than three-fourths of its travel occurs within the United States, the company spent nearly \$20 million on airline tickets at European points of sale last year.

Cargill employees used Sabre's GetThere online booking tool for 74 percent of its U.S. ticketing transactions last year, and 40 percent of those required no agent assistance. Outside the United States, the company used both GetThere and Amadeus e-Travel Management.

Cargill used the American Express corporate card on an individual bill, central pay basis.

99 CONOCOPHILLIPS

HOUSTON

2014 United States-Booked Air Volume: \$47.5 million

2014 Global Air Volume: \$90 million

2014 U.S. T&E: \$124 million

Principal Air Suppliers: Air Canada, Delta, United

Principal Hotel Suppliers: Hilton, InterContinental, Marriott Principal Car Rental Suppliers: Avis, Enterprise, National

Principal Online Booking Tool: Sabre GetThere

Principal Expense Supplier: SAP

Principal Card Supplier: JPMorgan Chase

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

Multinational energy company ConocoPhillips reduced its spending on airfares from the U.S. point of sale to \$47.5 million last year from \$49.4 million in 2013.

The Houston-based company last year focused on driving the use of preferred airlines, especially on international routes.

This year, ConocoPhillips is looking to improve traveler compliance and to increase use of restricted airfares. The company also has worked to rationalize its preferred supplier program in recent years and continues to do so.

ConocoPhillips uses American Express Global Business Travel as its consolidated agency in the United States and Canada. It uses a combination of American Express GBT and HRG elsewhere in the world.

U.S. travelers use Sabre's GetThere system for online bookings, and the company last year increased online booking adoption to 55 percent from 49 percent the prior year. U.S. travelers pay travel expenses on cards issued by JPMorgan Chase, and ConocoPhillips uses SAP globally for expense reporting.





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