

# REGAINING CONTROL:

Why travel  
managers  
hold the key  
to business  
travel's future



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## Regaining control, starts with a clear strategy.

The business travel landscape is evolving, but not always in ways that make it easier to manage. While global corporate travel spend is projected to reach \$1.57 trillion in 2025, with growth forecast to \$1.8 trillion by 2027, the return to travel has been anything but straightforward. Hybrid working has blurred the lines between personal and professional mobility. Traveller expectations are more fluid; increasingly, employees are bypassing policy altogether, booking their own trips, choosing convenience over control, and undermining the purpose of a managed travel programme.

According to a recent study by Navan,

Two-thirds of global business travel spend now flows through unmanaged channels, highlighting a persistent and growing disconnect between company policy and traveler behaviour

Is this a sign that unmanaged bookings continue to erode programme integrity? This is why the role of the Travel Manager has never been more critical, or (in my opinion) more underappreciated. This whitepaper builds not just on why we travel, but on how to regain control of business travel in a world where travellers have more choice than ever.

Specifically, we will explore:

- **Why leakage happens, and the mindset shifts behind it**
- **The risks of unmanaged, off-policy travel in a volatile world**
- **How preferred supplier relationships protect your people, brand and budget**
- **What progressive Travel Managers are doing in 2026 to build programmes that serve the business and the traveller**

In a world of growing complexity, structured travel isn't about control for control's sake, it is about visibility, accountability, and resilience. When customers engage suppliers as strategic partners (rather than transactional vendors) the benefits can go far beyond the original remit.



# WWEFH



## The business travel landscape continues to be shaped by one of the most enduring behavioural shifts of the last decade: hybrid working.

What began as a pandemic workaround has now become a defining feature of white-collar life.

The UK remains the home-working capital of Europe, with employees working remotely an average of 1.8 days per week, compared to 1.3 days globally.

Transport for London data underscores this shift, with weekday Tube ridership stabilising at around 81% of 2019 levels. Addison Lee was not immune to this trend, and we have observed similar patterns in our own operational data, particularly in a sustained decline in late-night-working rides from Canary Wharf and the City. These volumes dropped sharply during the pandemic and, crucially, have not returned to pre-2020 levels, suggesting that the traditional rhythm of office life, and the culture of late working, has undergone a structural change.

Media and political commentary continue to reflect a counter-narrative: a growing return-to-office (RTO) impetus. In September 2025, The Telegraph reported that employers were mandating mid-week attendance and tracking office presence via swipe-card data. Despite these efforts, Wednesday attendance stood at just 43%, down from 50% the year before highlighting a persistent mismatch between employer expectations and employee behaviour.





## Climate Concerns

We all appreciate that the travel landscape is far from simple. Aviation remains a significant source of emissions, and business travel accounts for an estimated 2% of global greenhouse gases.

According to McKinsey, four in ten European companies say they must reduce travel per employee by at least 20% to meet their 2030 sustainability targets.

**2%**

of global GHGs come from business travel

**20%**

travel reduction per employee needed to meet 2030 sustainability targets

## The True Cost of Travel

Financial pressures remain a key consideration. While the average ticket price (ATP) for business travel soared by over 70% in 2022, more recent forecasts show signs of stabilisation. CWT's Global Business Travel Forecast 2024 projected a 1.8% increase in ATP for 2025, alongside a 3.5% rise in average daily hotel rates (ADR.) These are more manageable increases; but they still reflect a structurally higher cost base compared to pre-COVID norms.

**1.8%**

CWT projected ATP increase for 2025

**3.5%**

CWT projected ADR increase for 2025

## The 'Bleisure' Resurgence

"Bleisure" (the blending of business and leisure) continues to enjoy its comeback. As travel becomes more flexible, many businesses are allowing their employees to extend their trips for personal time. While this presents challenges for compliance, it also offers a new incentive for travellers to book within programme; if suppliers can offer flexible options, transparent pricing, and quality experiences that meet both professional and personal expectations.

## A more cautious recovery – budget realities and booking shifts

While business travel spending is rising globally, Deloitte's 2025 Corporate Travel Study reveals signs of a more cautious recovery, particularly among large organisations. Nearly 1 in 5 corporates with travel budgets over \$7.5M expect reductions in 2025, and the overall share of large firms expecting growth in their travel spend has declined from 66% to just 59% year-on-year.

Even among those still investing, Deloitte state that the frequency of travel is dropping. The incidence rate (i.e., the percentage of professionals who travel for business) fell from 36% to 31%, and more travellers now report taking fewer trips per month. In short: travel is happening, but it's happening less often, and with tighter scrutiny.

Cost pressure is being compounded by sustainability targets: nearly half (48%) of companies are actively reducing travel to cut emissions, and the number of organisations targeting a 20%+ reduction in travel has nearly doubled since 2024.

Interestingly, compliance trends are shifting in favour of Travel Managers. Deloitte reports that while 49% of employees still use OTAs or outside tools, the gap between consumer and corporate booking experience is narrowing. The number of "rogue" travellers citing a better user experience on OTAs dropped from 46% to just 27%, suggesting a real opportunity to regain adoption and visibility.



## Small and Medium Companies Boost Travel Rebound

It appears that small and medium-sized businesses (SMEs) are leading the travel rebound. Amex GBT reported that SMEs accounted for 80% of corporate booking activity in late 2024, outpacing multinationals by 19 percentage points. Morgan Stanley's 2025 Corporate Travel Outlook echoed this, noting that two-thirds of companies under \$1 billion in annual revenue plan to increase travel budgets, compared with just 32% of large corporates.



## The wider impact of geopolitical tensions

While business travel is recovering, it's doing so in a world marked by heightened geopolitical uncertainty.

From energy price volatility to changing visa regimes, airspace restrictions, and trade disruption, the global operating environment has become less predictable: and more fragmented.

Flight schedules are increasingly vulnerable to last-minute change: airlines are now adjusting schedules weekly or even daily to respond to

demand, regulatory, and geopolitical shifts, rather than once or twice a year as before. For Travel Managers and programme owners, this environment reinforces one key point: unmanaged or ad hoc travel isn't just inefficient, it has every potential to become a liability.

Business travel is recovering, but it requires structure, oversight, and partnership. The role of the Travel Manager is more complex and more strategic than ever.

# The Trends

As travel becomes less frequent but more intentional, we are entering a “life-centric” era, where value is measured not just in cost, but in experience, wellbeing, and impact.

Amex GBT’s 2025 trends forecast identifies four key forces now shaping the future of business travel:

No.1

**Business  
travellers want  
more control  
and flexibility**

No.2

**The shape of travel  
is changing; longer  
stays, fewer trips**

No.3

**Sustainability and  
purpose are now  
non-negotiable**

No.4

**Premium  
experiences are  
rising, especially  
in cabin class**

Let’s explore what this means  
for your travel programme →

# Our thoughts



## 'Bleisure' and traveller empowerment go hand in hand

According to Expedia, 43% of business trips now include a leisure element. TravelPerk projects the global bleisure market will exceed \$470 billion in 2025, up from \$431 billion in 2024. Meanwhile, 54% of travellers took two or more bleisure trips in 2024, with many extending stays to recharge or explore.

Hilton's 2024 Trends Report highlights that 24% of travellers plan to bring a friend or family member on a business trip; a number that climbs to over one-third among Millennials and Gen Z.

Smart travel programmes can accommodate bleisure without losing control. This includes:

- Policy clarity on destinations and personal time
- Suppliers that separate personal and business expenses



## Purpose-driven travel - measured by more than cost

Sustainability has shifted from marketing message to business mandate. In GBTA's 2022 Outlook, 88% of travel buyers prioritised climate action. Amex GBT's 2025 insights confirm that "purpose" is now central to every travel decision, assessing not just cost, but outcome, emissions, and employee wellbeing.

According to Simon-Kucher, 35% of travellers will pay up to 27% more for greener flights, and 43% will pay more for eco-conscious hotels. With Scope 3 emissions under closer scrutiny, businesses are evaluating how every trip contributes to (or detracts from) their sustainability targets.

Suppliers who embed CO2 costs at point of booking, deliver transparent emissions reporting, carbon dashboards, and trip-level data become essential to fulfilling ESG commitments.



## Fewer trips, longer stays - and higher expectations

The shape of business travel is changing. Trips are less frequent but longer, often combining multiple meetings, cities, or events.

Amex GBT notes that remote work has shifted travel toward fewer, more valuable trips, and that this is reflected in booking behaviour. Many of our customers are rethinking trip design, favouring off-sites, retreats, and internal summits that strengthen culture and alignment.

Successful programmes:

- Encourage itinerary consolidation
- Provide tools that support multi-purpose bookings
- Update policy language to reflect strategic trip planning



## The premium economy surge - rethinking class of service

According to the CWT 2026 Global Business Travel Forecast, demand for premium cabins is expected to continue growing into 2026, with airlines expanding business and premium economy classes in response to rising expectations for wellbeing, productivity, and flexibility. This shift isn't just about luxury; it's about traveller resilience. Comfortable travellers arrive more focused and effective, improving the overall ROI of the trip.

Customers who have seen success:

- Reflect trip length, route, or role
- Include productivity and wellbeing metrics in approval logic
- Track trends by traveller group or department

## In summary: travel programmes for the life-centric era

As travellers redefine their expectations, and companies shift toward intentional travel, we have identified that the customers with successful programmes, have evolved to meet four key demands:



Flexibility and control for the traveller

Sustainability and transparency for the business

Fewer but better trips, aligned to strategy

Premium experiences that support wellbeing and productivity

With the right data, supplier partnerships, and policy clarity, Travel Managers are not just navigating change - they are leading it.

## Rethink & Rewrite Business Travel

In the current climate, businesses have a pivotal opportunity to rethink and rewrite their approach to business travel. By partnering with key stakeholders (both internal and external) you can architect travel programmes that not only safeguard your people but also align with evolving employee expectations and commercial priorities.

## What Forward-Thinking Customers are Prioritising in Their Travel Programmes

As travel continues to evolve in a more complex and sustainability-conscious world, many of Addison Lee's customers are refining their programmes to better balance traveller needs, against their own business and environmental goals.

These are some of the common focus areas we are seeing emerge across industries:

### 1. Duty of care as a foundational pillar:

Modern travel programmes increasingly incorporate clear risk assessments, 24/7 support lines, and emergency protocols to ensure traveller safety and confidence wherever they go.

### 2. Balancing traveller experience with business objectives:

Suppliers that offer app-based access, mobile payments, flexible booking terms, and premium service options (while still aligning with policy compliance and negotiated rates) are becoming the preferred choice for progressive travel programmes.

### 3. Loyalty integration and engagement features:

Reward schemes and loyalty point integration (such as the ability to accrue personal benefits through corporate bookings) have shown to encourage engagement and help consolidate spend within programme channels.

### 4. Policy design that guides rather than restricts:

Many successful policies clearly outline booking thresholds (e.g. premium cabins), leisure parameters, and exceptions; helping travellers navigate rules intuitively. This transparency has resulted in higher compliance and stronger user buy-in.

### 5. Understanding traveller mindsets:

While policies and platforms set the framework for travel programmes, it's ultimately traveller mindset that determines whether those frameworks succeed. Psychographic factors: such as attitudes toward sustainability, personal risk tolerance, tech savviness, or generational preferences, all play a role in how employees engage with travel. Without recognising these behavioural drivers, even well-intended policies can fall flat. By aligning programme design with how people (actually) think and feel about travel, some of our customers have improved adoption, compliance, and satisfaction.

### 6. Encouraging positive and responsible travel behaviour:

Highlighting responsible choices (such as travelling in-policy, choosing lower-emission options, or using sustainable suppliers) is increasingly being used to support ESG goals while managing programme risk.

### 7. Visibility through clear policy scope and value tracking:

Effective programmes tend to clearly define what travel and security costs are covered (or excluded), and leverage tools that report not just financial spend, but also carbon emissions and value delivered. This visibility supports stronger ROI narratives.

Taken together, these areas reflect how organisations are evolving their travel programmes to prioritise safety, flexibility, and measurable outcomes. The shift is clear: from rigid control toward enablement and engagement, with an increasing focus on traveller wellbeing, ESG alignment, and cost transparency.



# YOUR TRAVEL PROGRAMME

To help you evaluate your own programme against these evolving benchmarks, we have created a practical Travel Programme Audit Checklist. This simple, self-assessment tool is designed to help Travel Managers, Procurement Leads, and Programme owners identify gaps, highlight strengths, and prioritise the next steps in aligning their programme with modern business and traveller expectations.

[Download the checklist here](#)

Note: We understand that you may not be starting from scratch. This checklist isn't here to state the obvious, its purpose is to act as a practical tool for programmes at all stages of maturity. Whether you are building the foundations or refining a well-established policy, these are some of the traits we have consistently observed in the most successful, high-performing travel programmes across our customer base.



In a landscape shaped by disruption, decentralised behaviour, and rising expectations, the role of the Travel Manager has never been more essential or more strategic.

**The role of the Travel Manager has never been more essential or more strategic.**

**You are not just managing trips.  
You are protecting people.**

**You are not just enforcing policy.  
You are driving purpose.**

**You are not just tracking spend.  
You are proving value.**

## Want to be part of the conversation?

At Addison Lee, we believe in empowering Travel Managers to lead the charge, not follow it. That is why we have launched the Addison Lee Ground Transport Forum: a new space for Travel Managers to connect, share insights, shape best practice, and stay ahead of the curve on ground mobility. This forum isn't just another roundtable; it's a platform to shape the next chapter of business travel. From sustainability metrics and programme compliance to traveller experience and cost optimisation, we are creating a space for the conversations that matter.

Because regaining control doesn't happen in isolation. It happens through partnership, perspective, and action.

If you're interested in exploring these topics further and joining the conversation, please contact your account manager, or register for Addison Lee's Ground Transport Forum; a peer-led space for travel decision-makers to connect, share insight, and influence supplier strategy, [by clicking here](#).

Together, let's redefine what is possible, and put Travel Managers back where they belong: in the driving seat.



## A NOTE FROM THE AUTHOR



Having spent over 25 years in the travel and ground transportation industry (on both sides of the table) I have seen first-hand how the business travel landscape has evolved. Before I joined Addison Lee, I was a buyer and category manager at Credit Suisse. Today, as Strategy Partner at Addison Lee, I now support a business that not only delivers ground transport across London and the UK but is part of ComfortDelGro: a global mobility group that operates on five continents.

As someone who has lived the challenges of implementation, compliance, and executive buy-in, I believe this moment is an opportunity to rewrite business travel in a way that works for everyone. A chance to create structured, data-rich, and scalable programmes that

don't just tick boxes, but genuinely support wellbeing, performance, sustainability, and commercial value.

I hope this whitepaper helps you reflect, rethink, and refresh your travel approach. I will continue to share practical insights and real-world perspectives as the landscape evolves; grounded in experience, and always with one eye on what is next.

Here's to business travel that works - not just on paper, but in practice!

**Hayley Smith-Pryor**  
Strategy Partner, Addison Lee

# ABOUT THE CONTRIBUTORS

As one of the UK's most established and trusted names in ground transportation, Addison Lee has been supporting business travel for over 50 years. From airport transfers and executive car services to group movements and courier logistics, we deliver flexible, professional, and consistent journeys for thousands of organisations across London, the UK, and beyond.

- As ESG priorities reshape business travel programmes, we are proud to be driving measurable sustainability outcomes:
- Phased fleet electrification, including hybrids, plug-ins and full EVs

- Emissions reporting aligned to Scope 3 objectives
- Ethical governance and responsible supply chain practices
- Partnerships that promote smarter, lower-carbon transport choices

While every effort has been made to ensure accuracy, market conditions and industry developments are subject to change. Addison Lee assumes no responsibility for any errors, omissions, or updates that may occur after publication.

# SOURCES

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