

BCD travel

# Cities & Trends Europe

2023 EDITION

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## About the report

Business travel can be a seismograph for economic growth. The rise and fall of business travel volumes reflect the level and health of economic activity within a region or country. BCD's *Cities & Trends 2023 Europe edition* shows the top destinations for European business travelers with insights into how they travel. The findings are based on BCD flight and car rental data from 2023 in a range of European markets<sup>1</sup>. The upcoming *Cities & Trends 2023 U.S. edition* will publish soon. The reports are produced annually.

<sup>1</sup>Belgium, Czech Republic, Denmark, Finland, France, Ireland, Italy, Luxembourg, Netherlands, Norway, Poland, Sweden, Switzerland, U.K.

-  **Top 10 European cities**
-  **Top 10 intercontinental cities**
-  **Top 5 European countries**
-  **Top 5 intercontinental countries**
-  **Top 10 intercontinental routes**
-  **Cabin class and flight type**
-  **Car rental**

# Top 10 European cities

Western Europe is clearly leading with the top 10 intra-European cities driven by the return of face-to-face meetings and events, and the rebound in international business travel capacity and volumes. The rest of Europe is recovering slower, challenged by the war in Ukraine among other reasons.

**1** Amsterdam



**6** Copenhagen



**2** London



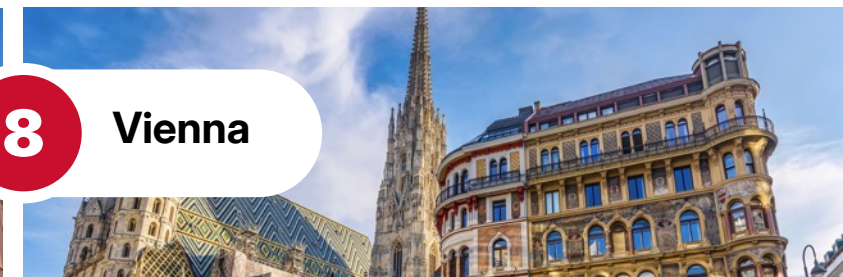
**7** Zürich



**3** Frankfurt



**8** Vienna



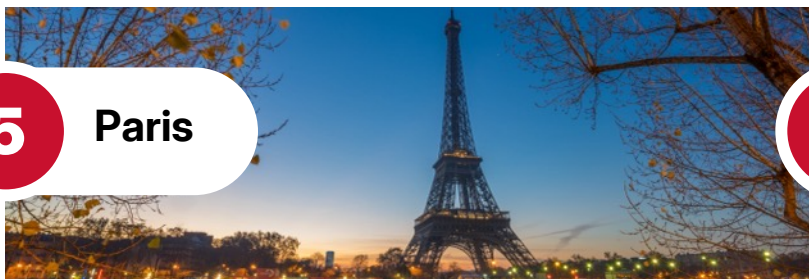
**4** Munich



**9** Brussels



**5** Paris



**10** Stockholm





## Top 10 intercontinental cities

The list of intercontinental cities is led by the U.S. with seven cities in the top 10. However, Dubai is performing very well in third place.



While global business travel rebounds, the pace of recovery in China has been more gradual, Beijing has dropped off the list from its 2019 position as the eighth most visited intercontinental city for European business travelers, and Shanghai has fallen from second to 10th place. Despite this, we're encouraged by the recent visa exemptions for travelers from certain European countries, and overall, more lenient visa procedures. **We anticipate a significant resurgence in business travel to China in 2024, evidenced by the early increase in travel volumes we've seen in the first two months of 2024.**



**Jonathan Kao**

Managing director of North Asia at BCD Travel

# Top 5 countries

Based on BCD flight transactions, Germany was the most visited European country last year, followed by the United Kingdom which dropped from first place in 2019 to second in 2023. Post-Brexit, EU and Swiss citizens now need a valid passport to travel to the U.K. and can no longer freely enter the country with a national ID card, effective since October 2021. Nevertheless, the U.K. remains a top destination for business travel.

## European

- 1 Germany
- 2 United Kingdom
- 3 Netherlands
- 4 France
- 5 Italy

## Intercontinental

- 1 United States
- 2 United Arab Emirates
- 3 India
- 4 China
- 5 Canada



**Risks like geopolitics and rising crime, new sustainability legislation and remote work continue to impact business travel volumes and where travel budgets are directed to. Airline capacities once sufficient might become scarce. A destination once safe might have become dangerous for travelers. These are some examples of why travel programs quickly need to adjust to new circumstances. We support our corporate clients by keeping them abreast of any developments, advising them on supplier negotiations, managing risks, and providing travelers with tools they like to use.**



**Michèle Lawley**

President of Europe at BCD Travel

# Top 10 routes

Based on BCD flight data, the most frequently traveled routes<sup>2</sup> for intercontinental flights from Europe depart from London and Frankfurt, together accounting for eight positions in the top 10 city pairs. Amsterdam and Paris complete the list of European departure hubs in ninth and tenth place.

The top 10 arrival hubs for intercontinental routes are largely dominated by the U.S., with New York City being the most popular. Shanghai is the only APAC arrival hub in the list.

- 1 London to New York City
- 2 Frankfurt to Chicago
- 3 Frankfurt to New York City
- 4 London to Los Angeles
- 5 London to Chicago
- 6 Frankfurt to Washington D.C.
- 7 Frankfurt to San Francisco
- 8 Frankfurt to Shanghai
- 9 Amsterdam to Atlanta
- 10 Paris to New York City

<sup>2</sup>Top routes combine data of multiple airports for the following cities: London (Heathrow, London Gatwick and London City); Paris (Charles de Gaulle and Orly); New York City (John F. Kennedy, Newark and La Guardia); Shanghai (Shanghai Pudong and Shanghai).



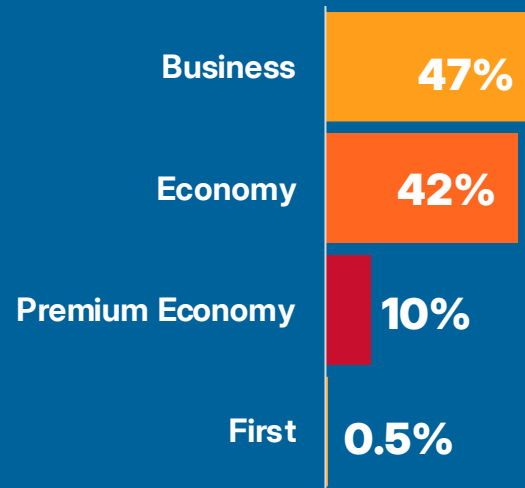
# Cabin class and flight type

When looking at the cabin class European travelers booked for intercontinental flights in 2023, 47% booked business class; 42% booked economy.

For comparison, within the U.S., business class and economy class make up for 53% and 36% of intercontinental flights, respectively.

Most flights in Europe are direct (84%), due in large part to how well-connected route networks are within countries. Intercontinental travel is almost equally split between direct and connecting flights.

## Cabin intercontinental



Direct flights

Europe  
84%

Intercontinental  
51%



**The chosen service class, type of flight and even the route have a direct effect on CO<sub>2</sub> emissions. For example, direct flights offer a shorter route and use less fuel on landing and take-off than connecting flights. By analyzing their emissions data, companies can hone in on what behaviors or policies they want to influence or change to support smart and purposeful travel.**



**Michèle Lawley**

President of Europe at BCD Travel

# Top 10 car rental cities

Germany leads the ranking for car rental with five cities in the top 10. The country has an extensive railway network, but capacity is limited, and train services may end before the traveler's destination. Travelers may still need transportation for the final leg of their journey. With the recent public transportation strikes in Germany, travelers might prefer rental car over rail. Germany's well-developed *Autobahn* network may also contribute to travelers choosing rental cars more frequently.

- 
- 1 Munich
  - 2 Paris
  - 3 Frankfurt
  - 4 London
  - 5 Stuttgart
  - 6 Amsterdam
  - 7 Milan
  - 8 Hamburg
  - 9 Berlin
  - 10 Barcelona



# Car rental insights

According to a recent BCD car rental survey of more than 900 business travelers worldwide, most business travelers rent a car to visit their company's office, meet with clients or provide onsite service.

The most common reasons for renting a car instead of using other means of transportation are convenience, speed, lack of alternatives and price.

Intermediate/standard cars are rented most often, followed by compact/economy.

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**21%**

**Car bookings  
compared to  
total air  
bookings**

**4**

**Average  
rental  
days**



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## About BCD Travel

BCD Travel helps companies travel smart and achieve more. We drive program adoption, cost savings and talent retention through digital experiences that simplify business travel. Our 13,000 dedicated team members service clients in 170+ countries as we shape a sustainable future for business travel. For more information, visit [www.bcdtravel.com](http://www.bcdtravel.com).