

Cities & Trends Europe

2025 EDITION



Your trip to
Oslo

Scheduled

London
LHR

2h 5m

Oslo
OSL

6:00 am
Ⓞ GMT

8:05 am
Ⓞ CET

Rail

22m

9:50 am

Oslo Airport Station

10:12 am

Oslo

CONFIRMATION
1189333567

LOYALTY#
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EST. TOTAL
37 USD

About the report

Business travel can be a barometer 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 2025 Europe report* shows the top destinations for European business travelers with insights into how they travel. The findings are based on BCD clients' flight and car rental data from 2024 in a range of European markets*. This Europe edition follows the recently published U.S. and APAC rankings.

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

Top 10 European cities

The European ranking in 2024 has mostly remained the same as the previous year, except for Stockholm jumping one spot, moving Europe's de facto capital Brussels to 10th place. Western Europe's [business travel growth in 2024](#) was primarily driven by real estate activities, followed by the arts, entertainment and recreation sector.

Over the past years, [Stockholm Arlanda Airport underwent significant upgrades](#), including an airside walkway connecting Terminals 4 and 5 and a new security control facility with advanced CT scanners. Future expansion plans for Terminal 5 aim to increase the terminal's capacity to accommodate up to 40 million passengers annually, up from 25 million in 2019. These ongoing enhancements contribute to a more efficient and pleasant travel experience for business travelers connecting through Stockholm.

1 Amsterdam



6 Copenhagen



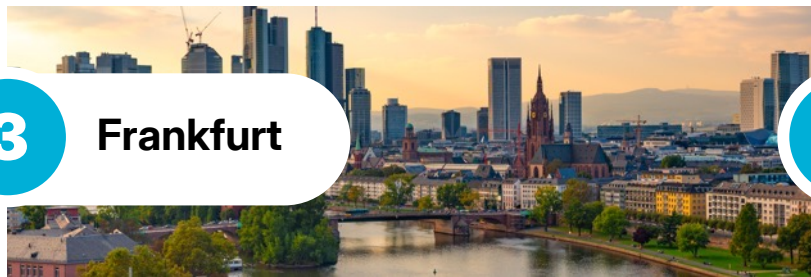
2 London



7 Zurich



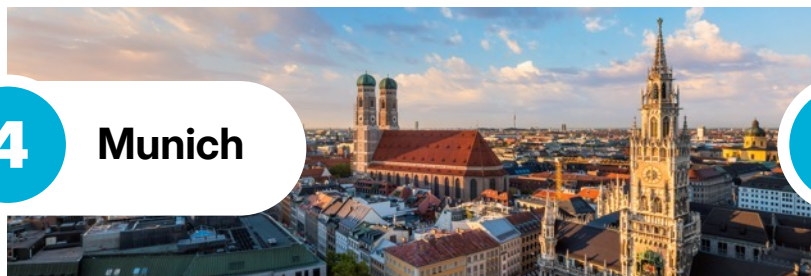
3 Frankfurt



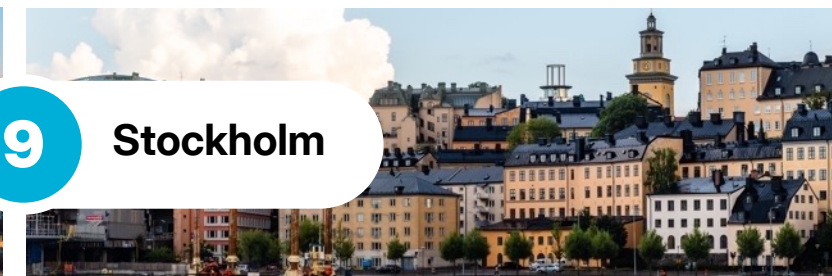
8 Vienna



4 Munich



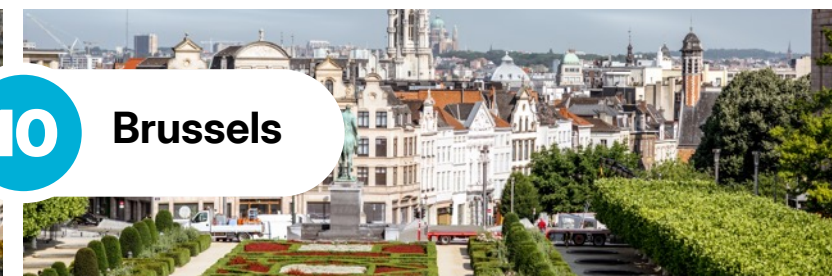
9 Stockholm



5 Paris



10 Brussels





Top 10 intercontinental cities

With eight cities in the top 10, the intercontinental list is clearly led by the U.S. Dubai remains solid in third place.



Although the geopolitical landscape will remain subject to rapid change and complexity, posing concerns for travelers and their companies, the global economy has delivered upside surprises in 2024. Global business travel growth over the past year surpassed expectations, paving the way for continued momentum in 2025.



Michèle Lawley

Regional President of Europe at BCD Travel

Top 10 countries

As a mature business travel market, it's unsurprising to see little change in the European country rankings, with Germany keeping its first position as the most visited European country. There are only some positional changes: Spain and Sweden both moved up to sixth and ninth place respectively, while Switzerland and Austria each dropped down to seventh and tenth place.

Italy is showing the strongest increase (21%) in inbound business travel within Europe. Its economic recovery, especially in the second half of the year, has bolstered business confidence and activity within the country. In addition, airlines have expanded their operations in Italy, increasing the number of flights and destinations served.

The international ranking has also remained largely the same with the U.S. firmly in first place. Only Qatar and Singapore swapped places. China has shown a strong rebound in travel, driven by key factors like eased travel restrictions, pent-up travel demand, economic upturn and policy initiatives to encourage travel.

Europe

- 1 Germany
- 2 United Kingdom
- 3 Netherlands
- 4 France
- 5 Italy
- 6 Spain
- 7 Switzerland
- 8 Denmark
- 9 Sweden
- 10 Austria

Intercontinental

- 1 United States
- 2 United Arab Emirates
- 3 India
- 4 China
- 5 Canada
- 6 Qatar
- 7 Singapore
- 8 Japan
- 9 Brazil
- 10 Morocco



The expansion of airlines' operations in Italy has improved connectivity, making it more convenient for business travelers to reach Italian cities. Additionally, the blending of business and leisure travel, known as **bleisure, has become increasingly popular. Italy's rich cultural heritage and diverse attractions make it an ideal destination for professionals seeking to combine work with leisure.**



Edoardo Priori

Managing Director, Italy at BCD Travel

Top 10 routes

London is the most popular arrival and departure hub for European flights, accounting for eight city pairs in the top 10 European routes*.

For intercontinental routes, London to New York City tops the chart. Intercontinental flights from Europe mostly depart from Frankfurt and London, together holding nine city pairs in the top 10 routes. The top 10 arrival hubs are dominated by U.S. cities, with New York City being the most popular.

*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).

Europe

- 1 Amsterdam to London
- 2 London to Amsterdam
- 3 Frankfurt to London
- 4 London to Dublin
- 5 London to Frankfurt
- 6 Dublin to London
- 7 Munich to London
- 8 London to Munich
- 9 Stockholm to Copenhagen
- 10 Copenhagen to Stockholm

Intercontinental

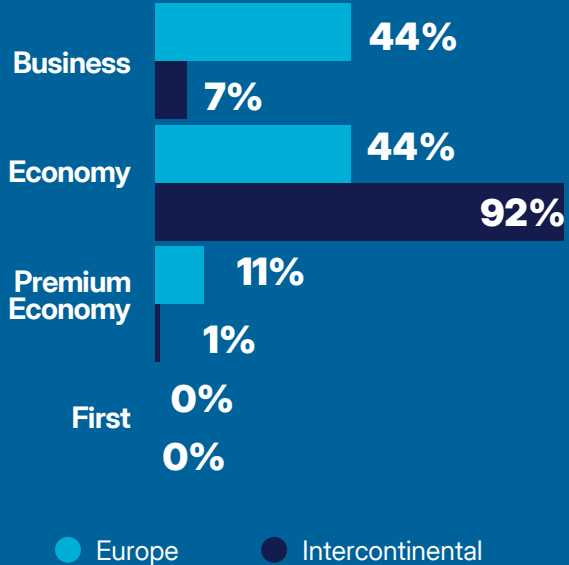
- 1 London to New York City
- 2 Frankfurt to Chicago
- 3 London to Los Angeles
- 4 Frankfurt to New York City
- 5 London to Chicago
- 6 London to Seattle-Tacoma
- 7 Frankfurt to Shanghai
- 8 Paris to New York City
- 9 Frankfurt to Washington, D.C.
- 10 Frankfurt to San Francisco

Cabin class and flight type

For European flights, business travelers mostly booked economy class (92%), with only 7% flying business class. However, the breakdown for intercontinental flights is equal: business class and economy class both make up 44% each. Premium economy and first class are booked the least.

Due to relatively shorter distances, high demand for point-to-point travel and smaller aircraft, most European flights are direct (85%). In contrast, only 52% of intercontinental flights from Europe are direct. Intercontinental travel is often structured around major airline hubs. Instead of every city having direct flights to other continents, airlines consolidate passengers at hubs like Amsterdam, Frankfurt or London to fill large aircraft before flying long distances

Europe & intercontinental cabin classes



Direct flights

Europe
85%

Intercontinental
52%

Why business travelers fly economy



On intra-European flights, there are several reasons why most travelers book economy outside of just being mandated by the travel policy. First, the difference in comfort between business and economy is often perceived as insignificant on short-haul flights; there aren't typically lie-flat seats, fine dining, or advanced in-flight entertainment options on short-haul flights in business. In addition, business travelers often benefit already from frequent flyer services like lounge access, priority boarding and better seat selection options, even when they fly economy.



Olivier Benoit

Senior Vice President at Advito

How companies benefit from economy flights



For travel managers, the return on investment is much higher on economy tickets. The average business fare is twice as expensive versus the average economy fare for intra-European flights, and for 70% of these flights, the duration is less than two hours. **From a sustainability perspective, although the real carbon emissions savings in economy versus business class come from long-haul flights, it is still more environmentally friendly to fly economy.** On such short flights, the productivity levels of a traveler won't differ much between economy and business class.



Olivier Benoit

Senior Vice President at Advito

Car rental insights

For 21% of all air bookings in Europe, travelers booked a rental car with an average of four days. Germany leads the ranking for car rental with five cities in the top 10: Munich, Frankfurt, Stuttgart, Berlin and Dusseldorf. Other top 10 car rental cities include Paris, London, Milan, Amsterdam and Vienna.

According to a [BCD car rental survey](#) in 2024 of more than 900 business travelers worldwide, most business travelers pick up a rental car at the airport (93%), while only a few do so at the train station (4%), in the city center (3%) or near their accommodation (3%).

Around one fifth rent an electric vehicle (EV) from time to time, and only 1% always select EVs. Remarkably, 81% never rent EVs on a business trip. This is mainly due to complex logistics (46%), low availability at the rental location (35%) and short range (33%), whereas 12% report their company's policy doesn't include EVs. Those who rent EVs are motivated by sustainability (51%), their desire to try an EV (29%) and wide availability at the rental location (24%).

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



An acute imbalance between supply and demand has seen car rental customers face some large price increases over the past two years. In many markets around the world, these rate increases continued for much of 2024. Car rental companies' costs will continue to rise due to pricier, tech-heavy cars which may lead to rate hikes for corporate clients. Businesses that haven't renegotiated agreements recently should prepare for significant rate increases in 2025, with tough negotiations needed to limit the impact.



Mike Eggleton

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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 15,000+ dedicated team members service clients in 170+ countries as we shape a sustainable future for business travel. BCD's leading meetings and events management and global consultancy services complete our comprehensive suite of solutions for all aspects of corporate travel. In 2023, BCD achieved US\$20.3 billion in sales. For more information, visit www.bcdtravel.com.