

BCD^otravel

Cities & Trends U.S.

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 United States edition* shows the top destinations for U.S. business travelers with insights into how they travel. The findings are based on BCD flight and car rental data from 2023 in the U.S. This report follows the recently published [Cities & Trends 2023 Europe edition](#). The reports are produced annually.

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

Top 10 domestic cities

Atlanta leads the list of most visited domestic cities for business travel. The home of many Fortune 500 companies such as Delta Air Lines and Coca-Cola, [Atlanta](#) is also recognized as the city with the fastest growth in people starting new businesses.

[Dallas-Fort Worth](#), featuring a robust network of major companies and corporate headquarters, and [Chicago](#), with a growing reputation as a tech hub, follow in second and third place.





Top 10 intercontinental cities

Europe dominates the intercontinental list with seven cities in the top 10. The EU and the U.S. have the largest trade and investment relationship in the world, according to the [European Union](#). Together, both economies account for one-third of global trade in goods and services. Apart from business hotspot London in first place, other European cities in the list are Frankfurt, Amsterdam, Paris, Munich, Zurich and Dublin. The ranking also includes three Asian cities: Tokyo, Seoul and Dubai. Latin America fell just shy of the top 10 list, with São Paulo ranked in 11th place.

Top 5 states & countries

Texas leads the top five domestic states for business travel. [Texas has no corporate or personal income tax](#) and is an appealing option for both companies and employees. In recent years, the state has attracted many corporate relocations from Silicon Valley, including high-profile companies such as Tesla and Hewlett Packard. Nevertheless, California in second place remains a top state for doing business.

Again, the intercontinental ranking with the U.K., Germany, the Netherlands and France demonstrates the strong trade relationship with Europe.

Domestic

- 1 Texas
- 2 California
- 3 Georgia
- 4 Illinois
- 5 Florida

Intercontinental

- 1 United Kingdom
- 2 Germany
- 3 The Netherlands
- 4 France
- 5 Japan

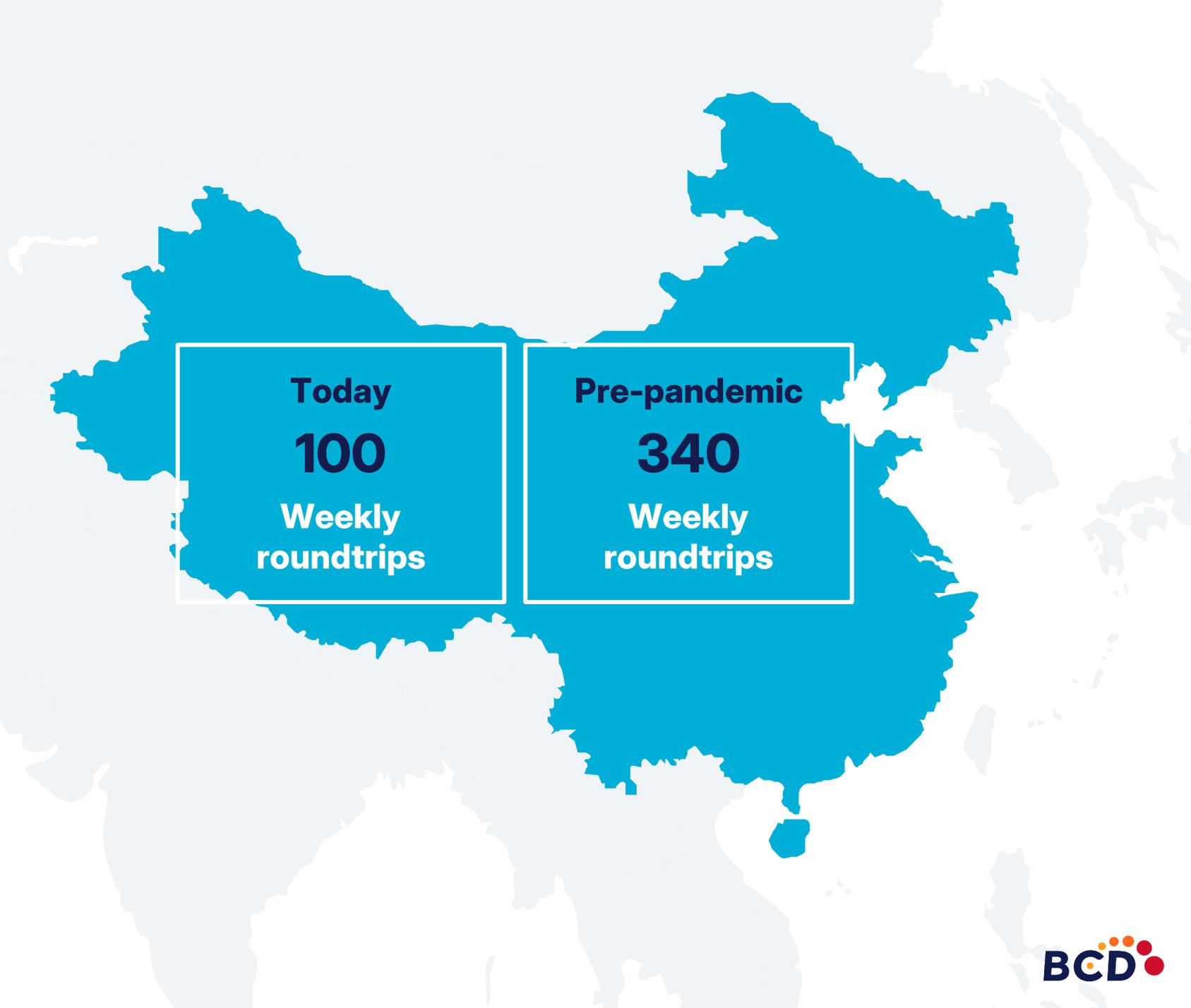
Business travel to China

China didn't make the intercontinental list of top five countries. Business travel between the U.S. and China is far from recovered.

Due to a bilateral U.S.-China agreement, flight capacity between the two countries is still only around one-third compared to 2019. Despite a recent easing of the agreement, it still only allows for a combined 100 weekly roundtrips across the two countries' airlines. This is a far cry from the roughly 340 weekly flights operated collectively pre-pandemic.

In addition, airport pairs have decreased from 46 to 16 compared to 2019. Currently, 91% of all flights to China are operated from west coast cities like Los Angeles, San Francisco and Seattle. Flights from the east coast account for only 9% (compared to 27% pre-pandemic).

All of this will make it even harder for travelers trying to connect to China, as seats are expensive and very limited.





On a global level, business travel has recovered to 90% of pre-pandemic (2019) levels. Factors like economic conditions, remote work and sustainability developments will continue to have an impact on business travel. For example, in 2024, a fifth of offices in the U.S. will be empty, as 60% of firms allow remote working*. But anyone in a team made up of remote workers will need to meet face-to-face occasionally. Companies are responding to this development, encouraging remote teams to meet at head offices or other convenient meeting locations. As the commuter of yesterday becomes the business traveler of tomorrow, remote work could potentially lead to more travel.



Craig Bailey

President of Americas at BCD Travel

*Source: [The Economist](#)

Top 10 routes

New York City is the most often used departure hub for intercontinental routes*, with flights to London, Frankfurt and Paris.

The top 10 arrival hubs for intercontinental flights are all in Europe and dominated by London and Frankfurt, together accounting for eight positions in the top 10. Amsterdam and Paris complete the list.

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

*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); Dallas-Fort Worth (Dallas-Fort Worth International, Love Field and Addison).

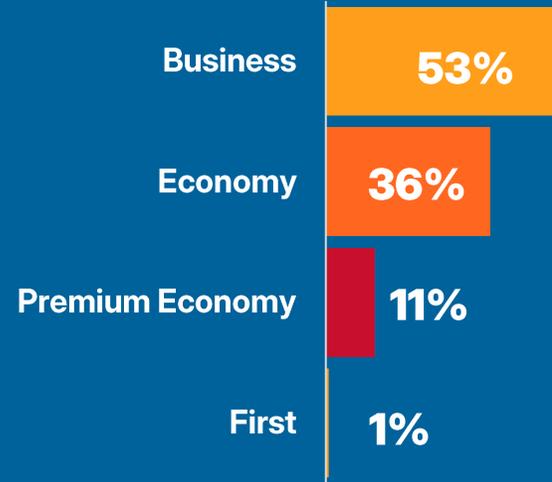
Cabin class and flight type

Travelers usually choose their flight and cabin class as per their company's policy, schedule and personal preferences.

If travelers want to reach their destination early, they tend to book a direct flight. If they don't have a time limit and want to save money, they might opt for a connecting flight.

For intercontinental flights, they're also highly dependent on whether direct flights to their destination are available.

Cabin intercontinental



Direct flights

Domestic
80%

Intercontinental
47%

Top 10 car rental cities

Dallas-Fort Worth leads the ranking of car rental cities.

When traveling for business, especially to a spread-out city like Dallas-Fort Worth, renting a car provides a convenient and flexible way to get around.

It offers the freedom to make your own schedule, without having to rely on public transportation, taxis or ride-sharing services.

1

Dallas-Ft. Worth, TX

2

Chicago, IL

3

Atlanta, GA

4

Washington, DC

5

Los Angeles, CA

6

Orlando, FL

7

Denver, CO

8

Houston, TX

9

New York City, NY

10

Phoenix, AZ

Car rental insights

For 44% of all air bookings in the U.S., travelers booked a rental with an average of four days.

According to a global [car rental survey](#) recently conducted by BCD, 83% of U.S. business travelers said they never rent an electric car on business trips. This is mainly because of complex logistics, low availability at the rental location and short range.

Car rental company Hertz planned to convert 25% of its fleet to electric by the end of 2024. Instead, the company recently decided to sell a third of its electric fleet and purchase gasoline-powered vehicles. Despite lower costs to maintain, EVs have higher costs for collision and damage repair. The company's decision reflects the broader challenges that impact the uptake of EVs in general.

44%

Car bookings compared to total air bookings

4

Average rental days



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