Business Travel in Europe

MARKET INTELLIGENCE BRIEFING

BT4Europe

Business travel is not just a subset of tourism. It is the connective tissue of the Single Market.
It underpins European trade, investment and collaboration. Policy frameworks have yet to reflect its scale.

€348.6bn
Total European business travel spend (2025)

6.1% CAGR
Projected growth 2024–2029 Western Europe

23 markets
European markets tracked in dataset

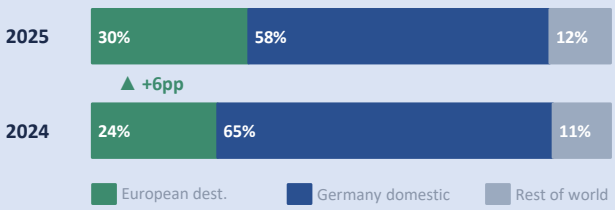
GROWTH IN CONTEXT

Historical & projected CAGR — Western Europe

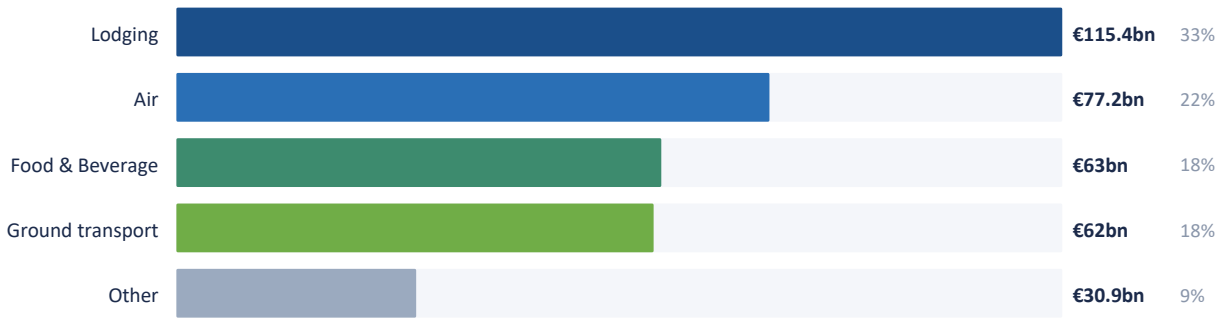
Pre-pandemic (2000–2019)	3.7%
Crisis & recovery (2019–2024)	0.5%
Outlook 2024–2029	6.1%

Growth normalising at a structurally higher level post-recovery.

European share of overnight stays — outbound Germany



WHERE THE MONEY GOES · EUROPEAN BUSINESS TRAVEL SPEND* BY CATEGORY · 2025



Nearly two-thirds of European business travel spend is generated on the ground. Lodging, ground transport and food & beverage together account for 69% of total spend — a structural signal of closer intra-European integration.

WHY THIS MATTERS · POLICY & STAKEHOLDER RELEVANCE

Infrastructure

Accommodation and regional mobility are as strategically important as air connectivity.

Regulatory frameworks

Cross-border mobility, A1 documentation and harmonised EU rules affect the majority of spend.

Competitiveness

A resilient, integrated European travel ecosystem is a precondition for sustained collaboration.

GBTA

Data: **GBTA Business Travel Index 2025** (market size, spend structure & growth projections); **VDR Business Travel Analysis 2026** (European overnight stay share). European spend figures represent aggregated business travel. Western European CAGR as defined by GBTA. *Converted from USD using average 2025 exchange rate (1 USD = 0.89 EUR).

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