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Neue Wege.

Who is waiting at the gate? An analysis of European passengers

DATASET2050 (D3.1 & D3.2)

Ulrike Kluge

Pictures: fotolia, backpacker-magazin.de

Motivation and objectives

Analysis demand side of European (air) transport system

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>> *Passenger at the centre*

> Understanding current and future European transport system from passengers' perspective

> Gaining insights into passengers' expectations, needs, requirements and specific travel behaviour

> Door-to-door focus

>> *Data-driven approach*

> Analysis of existing data on passenger demand and travel behaviour

> Consideration of future demand changes using both qualitative and quantitative data

>> *Development of passenger profiles (WP3)*

> Six current and future passenger demand profiles and respective archetype journeys (2014 & 2035)

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Passenger characteristics

Influenced by various factors

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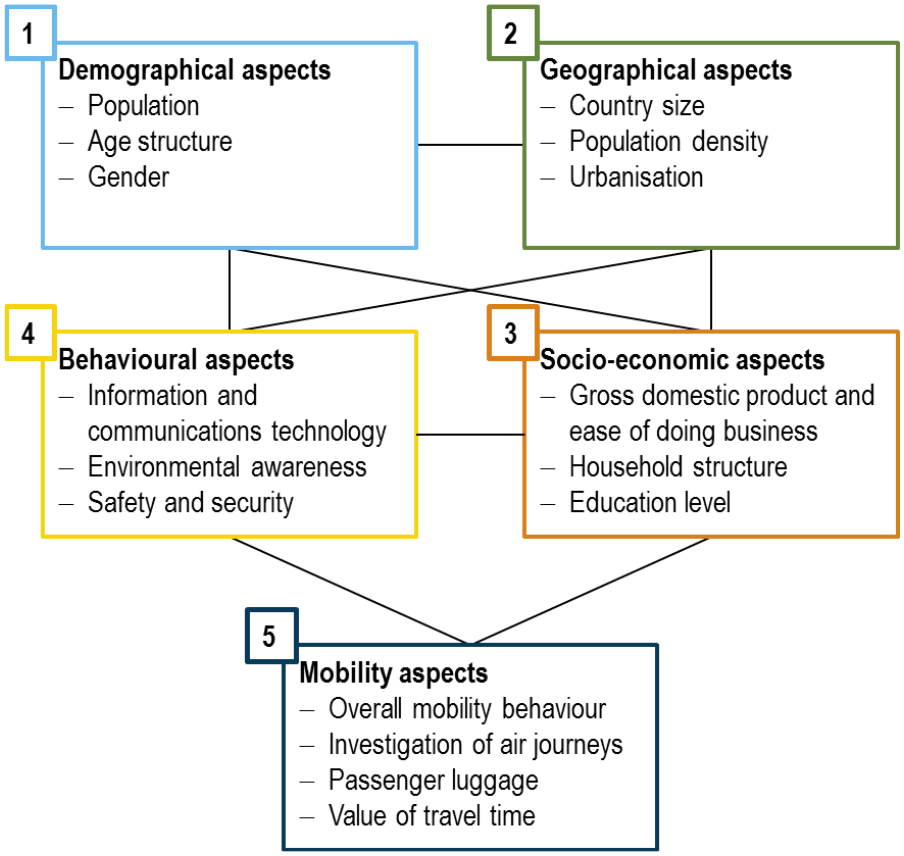
>> ***Passengers' (air) transport demand and travel behaviour***

> **Depiction of demand for mobility in general and for air transport in particular**

> **Influenced by various factors:**

i. Demographical aspects
ii. Geographical aspects
iii. Socio-economic aspects
iv. Behavioural aspects
v. Mobility aspects



>> ***Current status and future development of passenger characteristics***

>> ***Interdependencies between factors***

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Development passenger profiles

Approach in WP3

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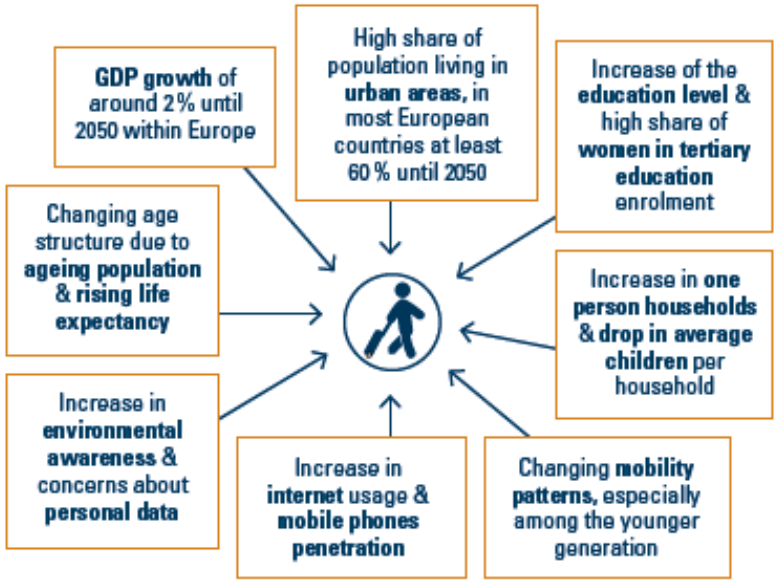
>> Passenger demand profiles

> Identification of six current and six future passenger demand profiles

1. Analysis of European data (EU28 + EFTA)
2. Using existing studies on passenger profiles
3. Characterisation according to
   - > Main travel purpose
   - > Age group and income level
   - > Usage of ICT
   - > Length of stay
   - > Travel activity and travel party size
   - > Luggage requirements
   - > Value of time
   - > Access mode choice
   - > Etc.



Future development of demand drivers (eMarketer (2015), ESPAS (2015), Eurostat (2016), Euromonitor International (2013), ifmo (2013), OECD (2008), OECD (2011), PwC (2015), UN (2015), World Business Council For Sustainable Development (2015)

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Causal loop diagram

Exploring interdependencies between demand drivers

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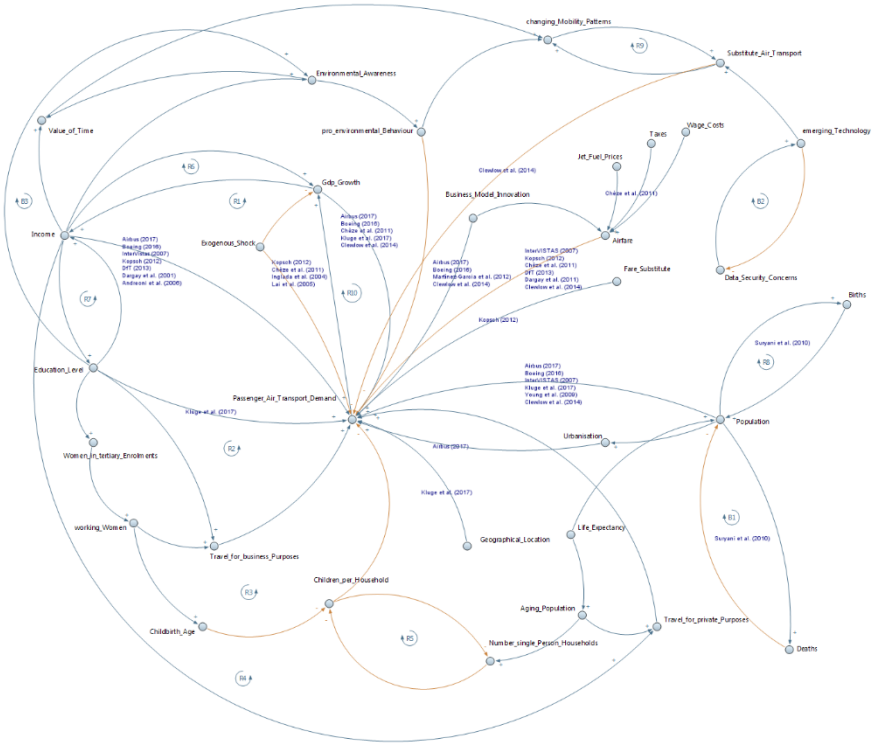
>> ***Complex nature that requires different approaches to explore***

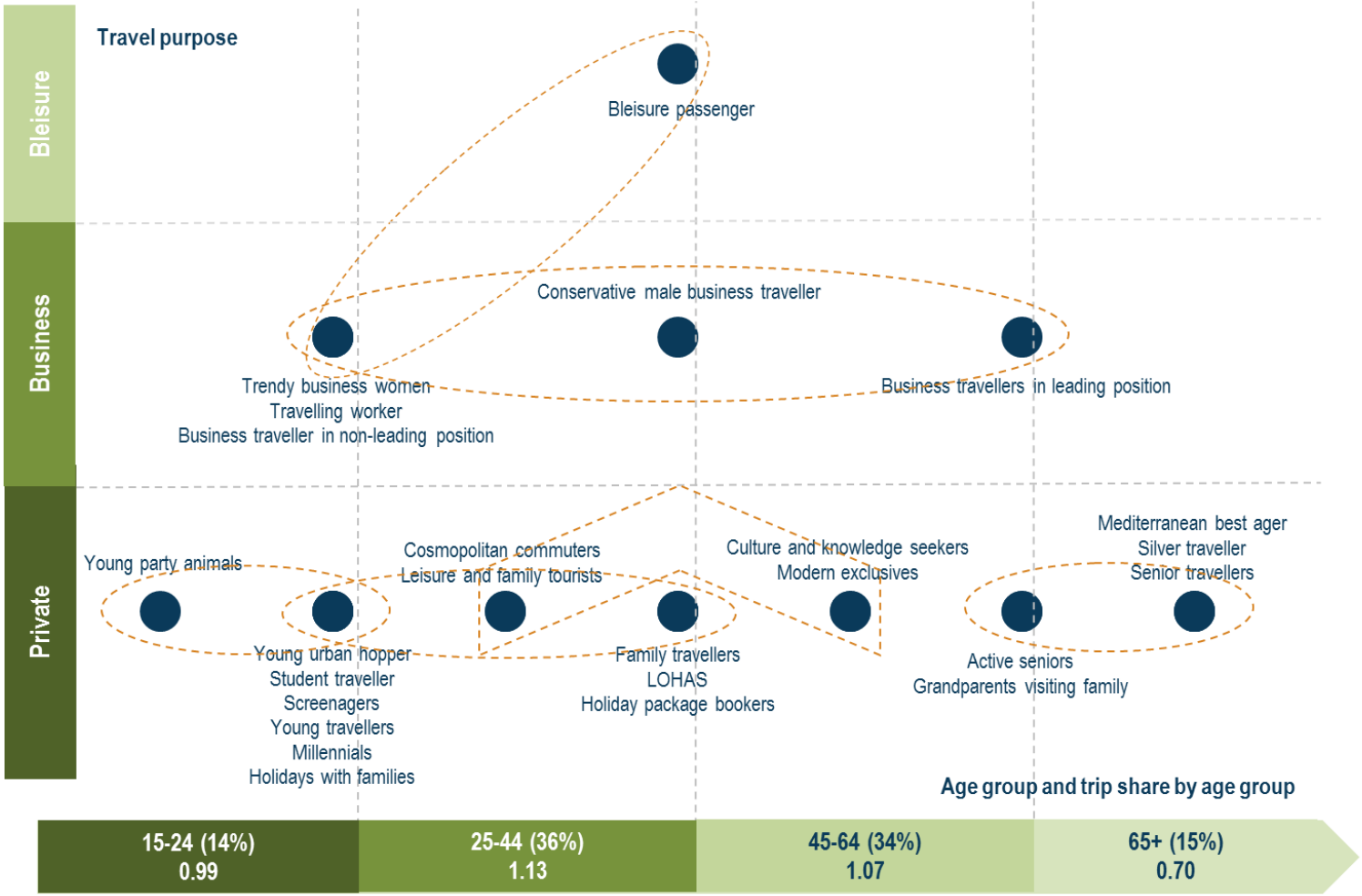
> Used approach: causal loop diagram (CLD)
> Each demand driver is depicted as variable
> Identify behaviour of the system
> Identify relationships between factors
> Offers a graphical illustration at hand

>> ***Thorough set of demand drivers on air transport demand***

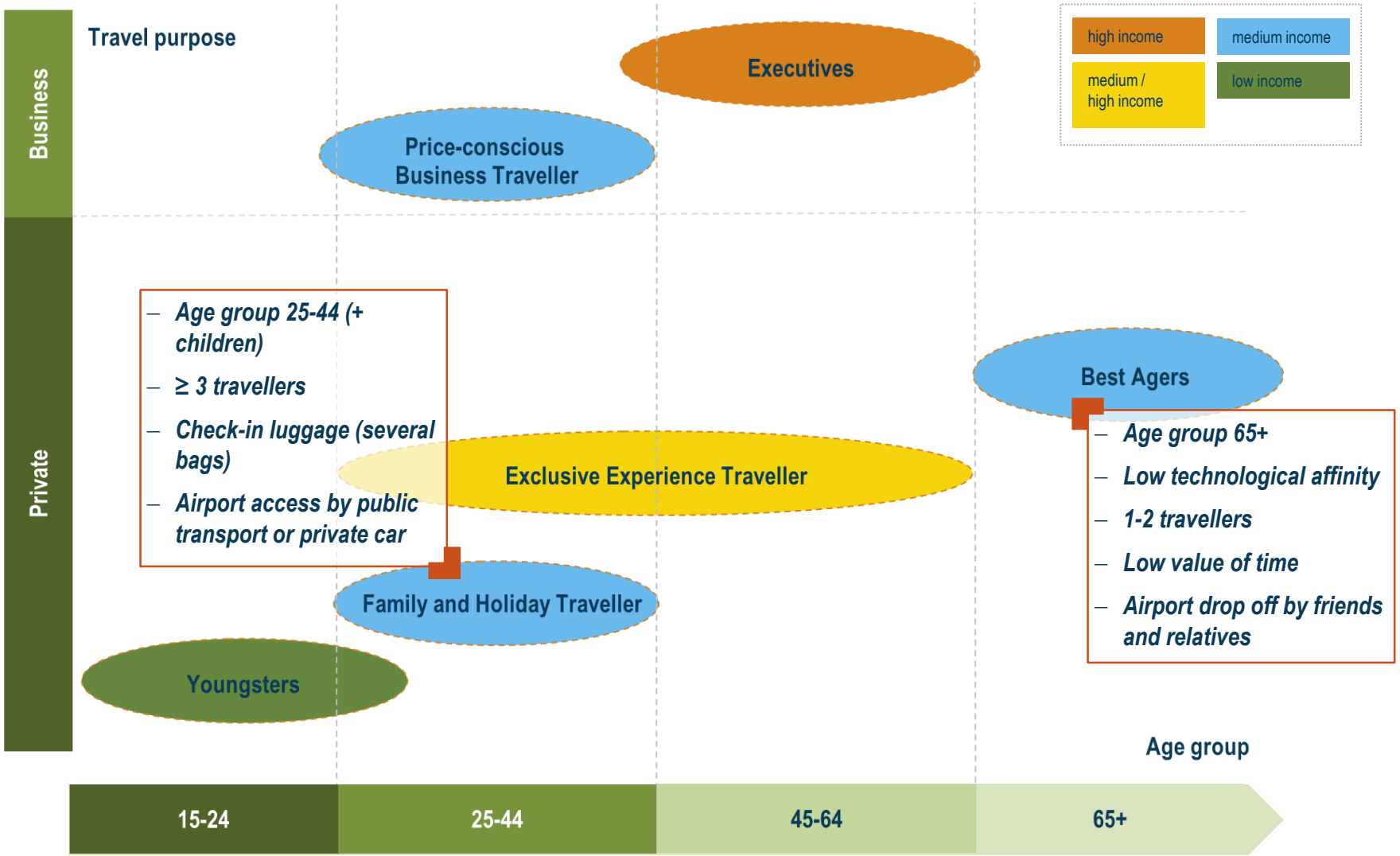


Passenger cluster literature review

According to age, travel purpose and trips per capita



Current demand profiles
2014



Future passenger demand profile
2035

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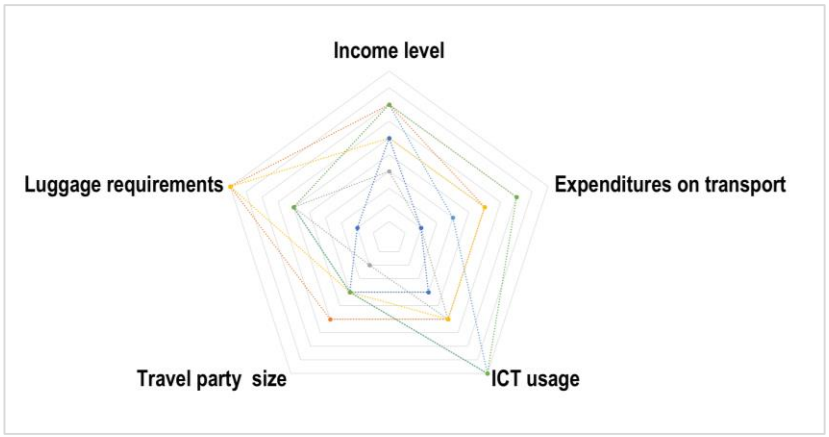
>> Profiles developed within DATASET2050 project (D3.2)

- Cultural Seeker
- Best Agers
- Family and Holiday Traveller
- Environmental Traveller
- Single Traveller
- Digital Native Business Traveller



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Demand profiles in 2035 (1/3)

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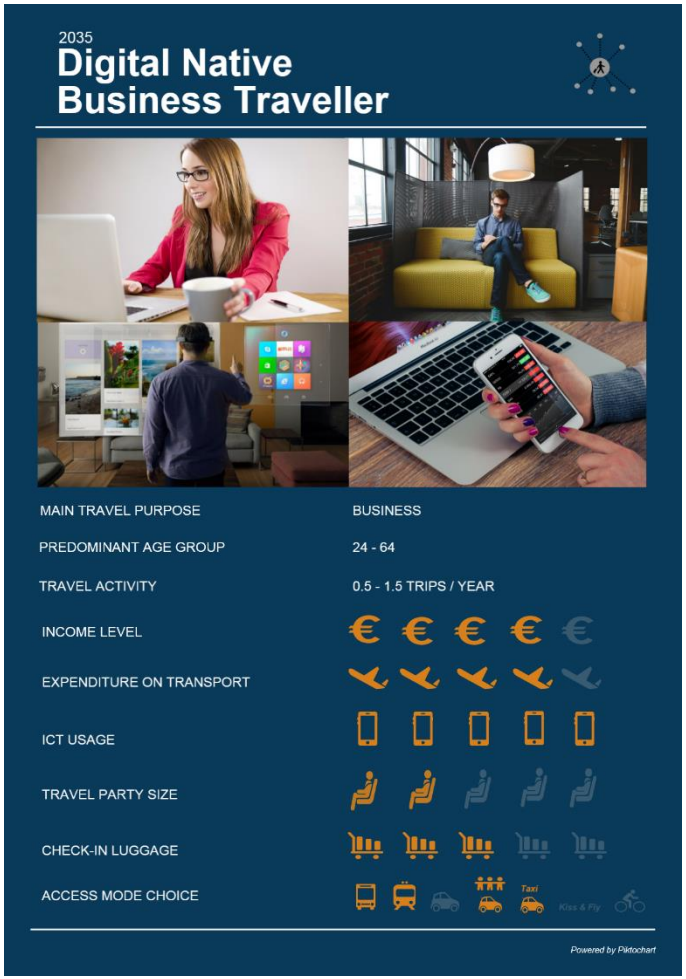

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Demand profiles in 2035 (2/3)

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Demand profiles in 2035 (3/3)

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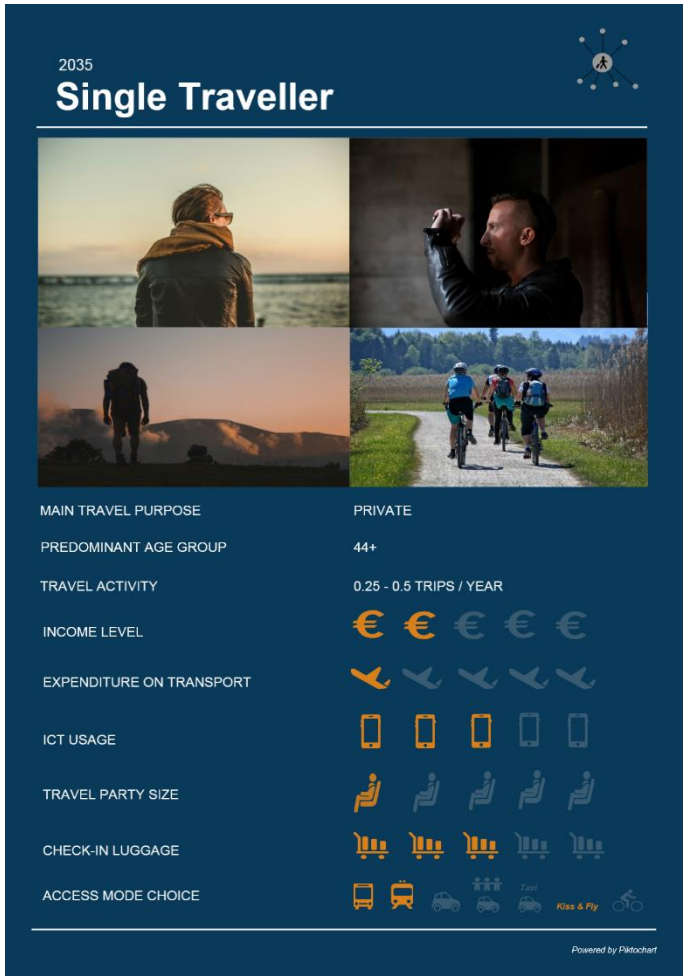

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