

JCDecaux research offers major passenger insights

New research insights from Ipsos UK compiled for JCDecaux provide a revised outlook of air passenger profiles, their relationship with the airport environment, and consumer behaviour relative to advertising within that environment.

The latest figures from the International Civil Aviation Organization (ICAO) showed a promising rebound in passenger traffic for 2023.

The 8.6 billion pax recorded last year was 95% when compared with figures from 2019, and ICAO estimates rising traffic through 2027.

In an open forum webinar, Jérôme Lepage, Global Transport Marketing & Business Development Director at JCDecaux, sat down with Tim Bond, Associate Director at Ipsos UK, to detail and assess this latest research.



In areas where JCDecaux is present, incidences of business flyers, decision makers and frequent flyers were higher than average.

Premium audience, premium opportunities

In conducting this study, Ipsos sampled 11,368 respondents from 14 different countries. This sample was taken as nationally representative of the market's flyer profiles, primarily broken down by age, gender, income, and region.

The fieldwork was conducted between November 2 and December 1, 2023.

The data gathered was then compared against the general population.



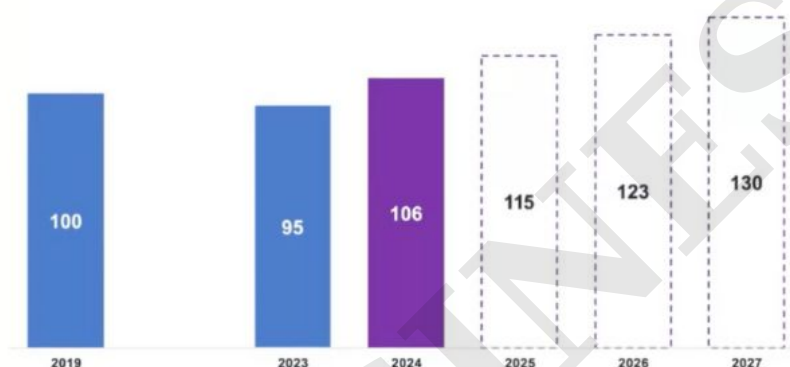
The data were broken down across four key profiles: business flyers; 'bleasure' flyers (those who

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fly for both business and pleasure); Gen Z (respondents aged 18-24); and frequent flyers (those who flew five or more times in a year).

Over 60% (9,500) of respondents had flown within the last 12 months, and the overall finding from the research strongly suggests flyers are a premium audience; flyers typically skew younger and wealthier, as those in the 18-44 age group were over-indexed at 52% compared with 47% for the general population.

evolution of global passenger traffic
(indexed, 2019 = 100 – Source: ICAO)



The latest figures from the International Civil Aviation Organization (ICAO) showed a promising rebound in passenger traffic for 2023. The 8.6 billion pax recorded last year was 95% when compared with figures from 2019, and ICAO estimates rising traffic through 2027.

Forty three percent also indexed as a high-income group versus 33% for the general population.

The numbers spoke for themselves particularly when considering business flyers, who flew on average 5.9 times per year, versus 3.6 times per year for all flyers.

Travelling with intent

“People have learnt to miss it,” said Bond, commenting on the positive news that compared to pre-covid levels, 61% of respondents have maintained or even boosted the frequency with which they fly.

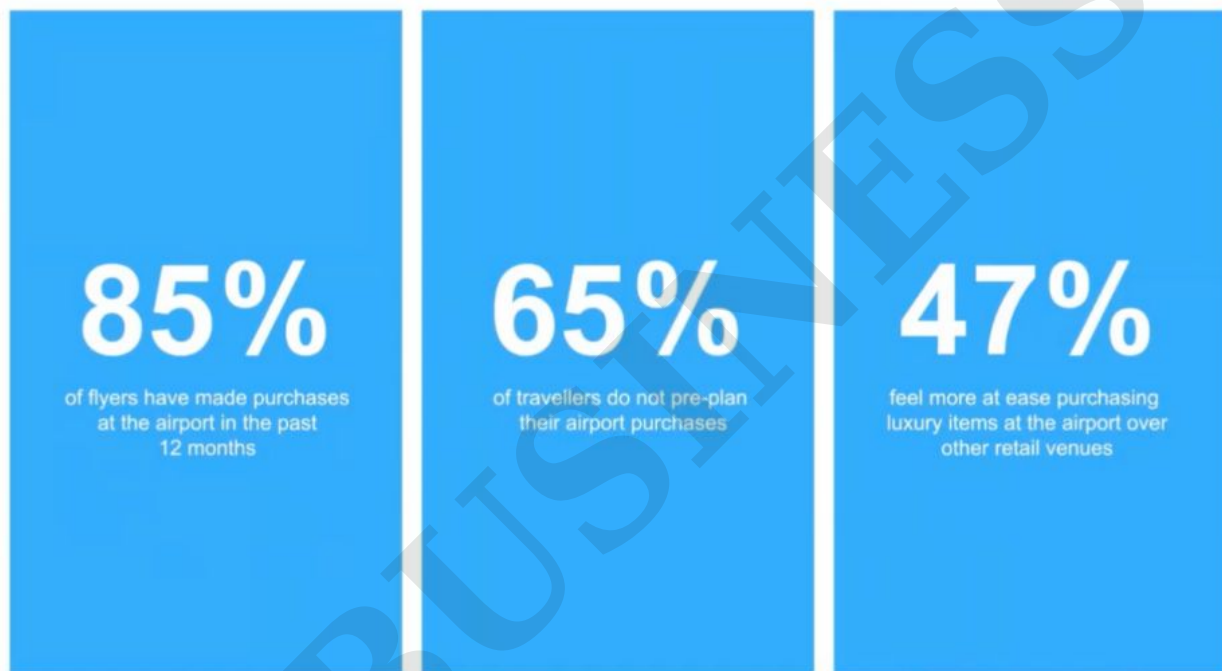
Bond noted this robust intention to travel was seen most strongly in Belgium, China, Germany, and France, adding: “This is also in line with an Ipsos study we run called Global Business Influencers which looks at senior business decision-makers across 31 markets. In that study we see 56% of those key decision makers expect to travel more for business in the next year, and 49% expect to travel more for leisure as well.”

A sense of place

Lepage cites the transformation of the airport environment through design, services and experiences at Charles de Gaulle Airport, Milan Linate, Lima Airport, and others as a strong indicator of things to come.

Paul Griffiths, CEO of Dubai Airports, provided comment regarding this shift in focus: “If you look at the way brands and services advertised 15 to 20 years ago, it has shifted to brand images; advertising mediums are based on establishing an emotional connection over specific product details.

Advertising in the airport plays a key role in helping to create this ambiance and brand presence that will inspire an emotional response from our customers.



85% of flyers made purchases exceeding \$100 over that of food and beverages, 17% surpassed the \$500 mark, and 2/3 of travellers agreed they don't pre-plan their purchases.

We see an integrated future between advertising, brands, the design, and execution of the airport experience both in a physical sense and an emotional sense.”

The research from Ipsos UK confirms as much.

71% of respondents agreed airport layout was important, the airport experience was different from everyday life, and 68% agreed it formed part of their overall holiday or travel experience.

As the airport is integrated into the journey, the perception of brands within that space is elevated.

Brands advertising within airports were more likely to be seen as global (69% vs 56%) creative (60% vs 55%), innovative, trustworthy, and prestigious, with 77% taking at least one positive or commercial action (*downloading an app/ visiting a store*) during or proceeding brand exposure.

Confectionery, fragrances and perfumes, and beauty products were the top three purchase categories.

Health, terrorism, and a sustainable future

“Climate change was one of the top three concerns shared by respondents, together with health, war, and terrorism,” notes Lepage.

Interestingly, concerns over climate change revolved more so around changes within domestic behaviour such as saving water, saving energy, and avoiding the use of single-use plastics rather than directly cutting air travel.

“At a macro level, the aviation industry is already committed to a transformation towards a more sustainable future, and this shared vision is driving collaborative reform among governments, airport authorities, airport partners and airlines,” adds Lepage.

Olivier Jankovec, Director General of ACI Europe, provided important context to the ongoing transformation of airports within the global context of sustainability: Decarbonisation is no longer about our licence to grow, it is increasingly about keeping our license to operate. The ultimate frontier of us is facilitating the availability of sustainable aviation fuel (SAF) and to prepare for zero-emission aircraft. Airports today are transport hubs but we can potentially become energy hubs, providing green energy not just to the airlines but also to our communities around the airport.

The future of advertising

Contrary to popular belief, data compiled by Ipsos shows 53% of flyers in the past 12 months arrived at least two hours pre-departure.

Bond suggested even for experienced business flyers, this points to a desire to fully immerse oneself within the airport environment.

This presents a golden opportunity for retailers to grow awareness, consideration, and drive conversion, especially in an age where partners like JCDecaux are keen to reinforce the digital network.



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For domestic departures, 42% arrived at least two hours pre-departure, with this figure increasing to 60% for all international passengers, and the same for all business flyers.

The emergence of interactive advertising elements, 3D, virtual reality and even some AI technologies offer more granular means of developing a more specific, dynamic 'feel' and brand image within the airport experience.

To that end, JCDecaux has plans to continually develop its own data analysis capabilities.

Lepage said: "In Dubai, Paris, Frankfurt, and other places we are starting to gain access to data from duty free operators which will help us optimise our media and gain feedback on ROI. We've got a data department at JCDecaux supporting all our subsidiaries. We have a dashboard ready but need further access to data to be in a more collaborative position."

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