

# The Airport Mobility Opportunity

Exploring the scale and needs of a market underserved by the travel industry





# Mobility Background

## What is “Mobility”?

In the travel industry, Mobility is broadly defined as transportation options including car rental, private transfer, on-demand (or ride-hailing), taxi, shared shuttle, bus and rail.

This report focuses on “airport mobility” which is classified as car rental, on-demand (or ride-hailing), private transfer, taxi and shared shuttle, to or from an airport. We’ve excluded bus and rail from some of the findings in this report, and all market data excludes India and China.

While offering the ability to book car rental on airlines and travel platforms is broadly adopted, the wider mobility market offers a largely untapped revenue stream for the travel industry. To illustrate this, at various points in this report we will make direct comparisons between “Car Rental” and “Broader Airport Transfer” modes which primarily includes private transfer, on-demand, taxi, and shared shuttle.

## Why is this important?

While there is comprehensive market data available on car rental today, there is very limited data on consumer behavior and needs with respect to the broader mobility opportunity. This report aims to help the travel industry generate a clearer picture of the market size, trends and opportunities.

## Airport Mobility



### Car Rental

A car/vehicle rented for a short period of time

## “Broader Airport Transfer”



### Private Transfer

Typically pre-booked 12+hrs in advance and includes a waiting time allowance



### On demand

Also referred to as “ride-hailing”, this is mobility ordered on demand or in advance via a mobile app



### Taxi

Traditional taxi or cab - hailed from the street, on-line at a taxicab stand or ordered by phone call



### Shuttle

Or “shared shuttle” is group transport of up to 8 seats, with a maximum of three stops, which drops you off at the airport of your choice and vice versa



Bus



Rail



### Private Car

A consumer's own car or organized travel mode via a private car (i.e. not paid for)



# Key Findings



1

The global airport mobility opportunity is worth **\$60-70bn** with the “broader airport transfer” comparable to car rental at **\$19-23bn**

The shape of the opportunity is different to Car Rental with the Broader Airport Transfer offering **7x higher volumes** – offsetting lower average booking values



2

**Cost, reliability and convenience** are the top priorities for consumers when it comes to airport mobility



3

There is significant pent-up demand among consumers to buy airport transfer from their **flight or travel vendor**



4

The customer booking journey is long and complex – and it's also **omni-channel**



5



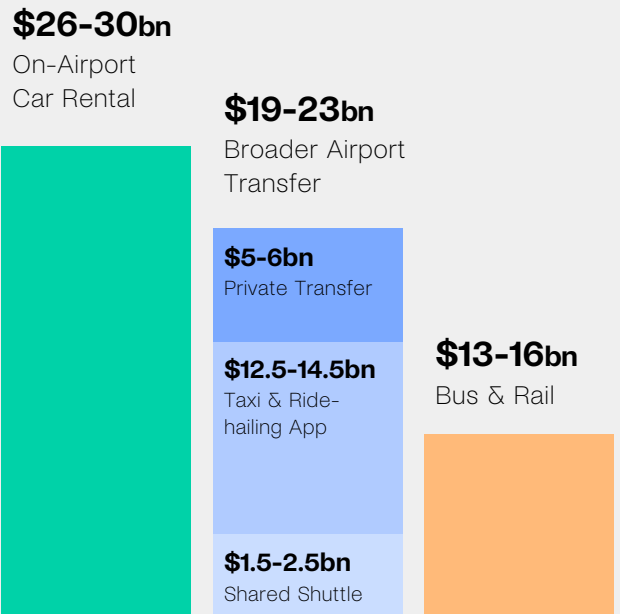
# 1 The Global Opportunity is Significant...

The global airport mobility opportunity is large; with the broader airport transfer comparable in scale to car rental.

As of 2021, the airport market was valued at **\$60-70 billion\*** including car rental. When you break this down into its parts, you begin to see the opportunity for travel vendors lies in how it capitalizes on the **Broader Airport Transfer** market. Airport private transfers alone are worth c.20% of the value of the airport car rental market today but there's opportunity to capture share of the broader (and much larger) airport transfer market.



**\$60-70bn**  
Global Airport Mobility



**\$85-95bn**

Global non-airport taxi, private transfer and ride-hailing market

The mobility opportunity beyond the Airport mobility market is also large, and our consumer data is suggesting demand for in-destination mobility options is extremely high.

Note: All data excludes India & China

\*All figures are US dollars, calculated using the 2021 average exchange rate of 1 EUR = 1.1827 USD sourced from the European Central Bank



# ...And Differs by Geography

While the scale is similar, the **shape of the opportunity varies significantly** between North America and Europe.

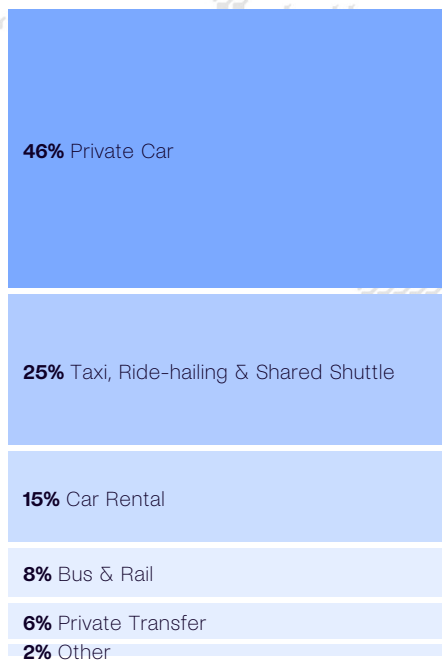
**c.60%** of airport journeys are made by either **private car or rental car for North American** consumers, where the culture of car ownership and car rental are deeply embedded and public transport infrastructure is limited.

**In Europe, nearly 60% of airport journeys** are made by either **public transport or broader airport transfer**. Factors driving this include high-quality bus and rail infrastructure, cost of car parking, shorter average journeys and higher density locations.

## Global Airport Passenger Journeys by Mode of Transport, 2021

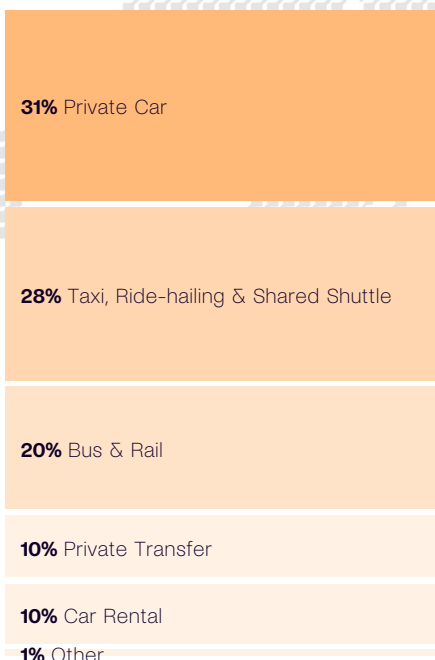
**1.0-1.2bn**

Passenger Journeys in North America



**0.9-1.1bn**

Passenger Journeys in Europe



**0.9-1.1bn**

Passenger Journeys Rest of World

Note: All data excludes India & China



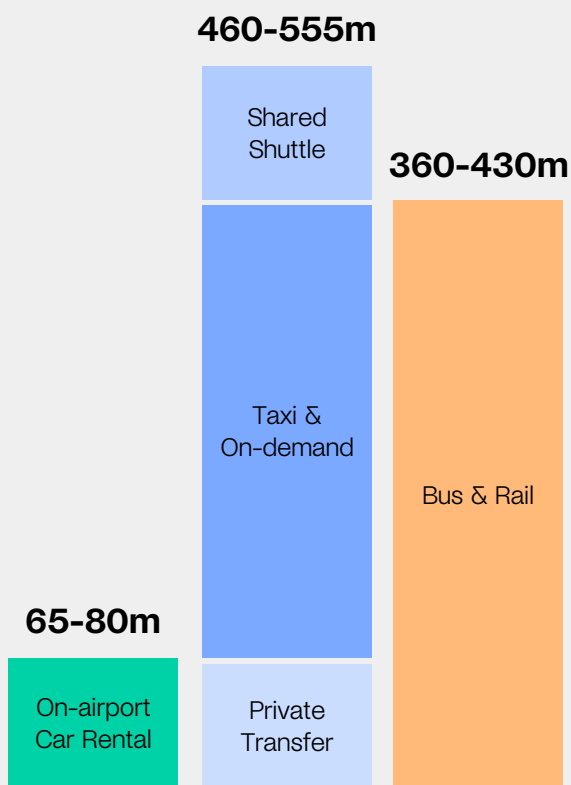
## 2 This is a Volume Driven Opportunity

The shape of the airport transfer opportunity is **different to car rental.**

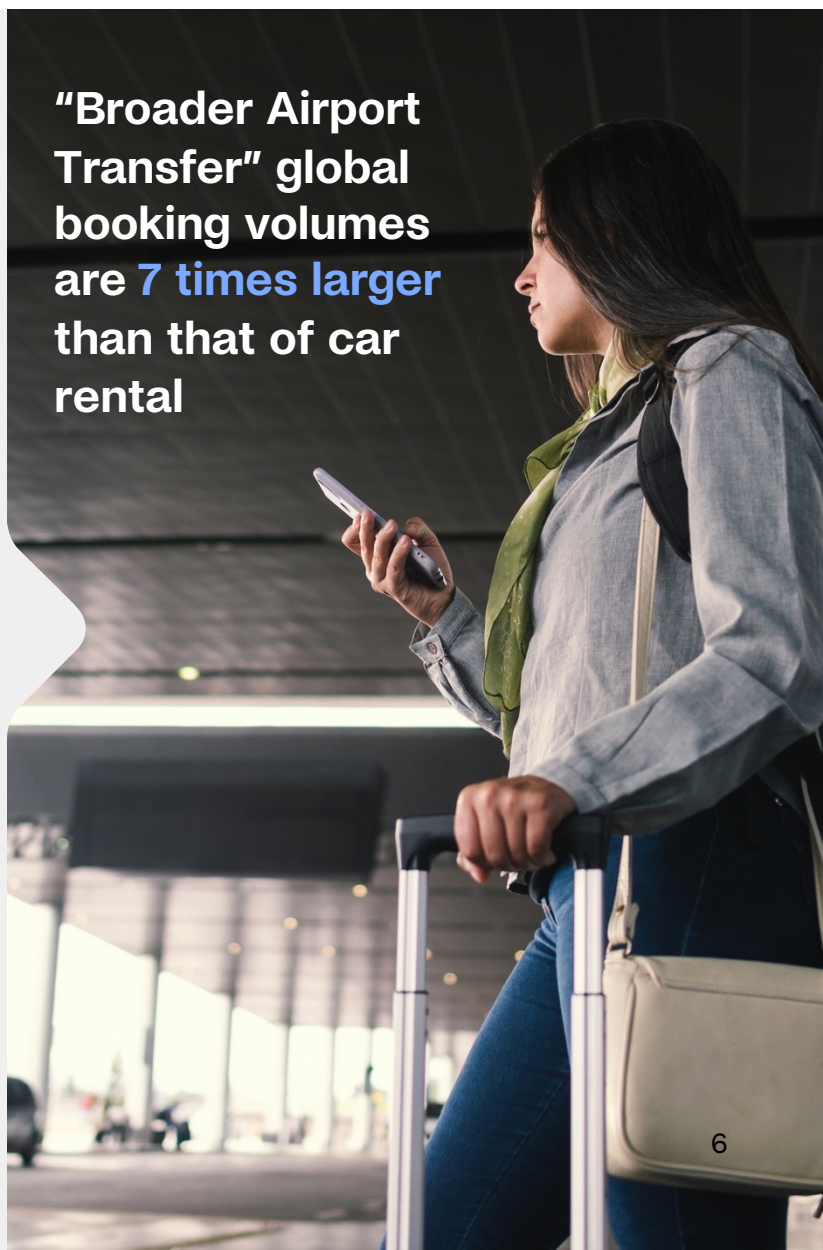
There are c.7 times as many airport transfer bookings as there are on-airport car rental bookings, with these increased volumes offsetting lower average booking values across the various modes of airport mobility transport.

Although pricing for these modes of transfer is ca. 0.15x that of car rental, when you consider increased volumes then both markets are comparable in size from a value perspective.

Global Booking Volumes, 2021



Note: All data excludes India & China



**“Broader Airport Transfer” global booking volumes are 7 times larger than that of car rental**



# 3 Significant Pent-Up Consumer Demand

There's significant pent-up consumer demand to **buy airport transfer from their flight or travel vendor**.

The research showed that 50-60% of consumers are likely to consider buying airport transfer from their flight or travel vendor. However, awareness and availability are the key blockers for consumers.



## Consumer Challenges

c.30% did not consider their flight vendor for mobility because they were not aware they sold it or in fact the vendor did not sell it. A further 20% did not consider because their flight vendor was not front of mind when booking their mobility journey.

## CarTrawler Case Study

We have seen the scale of this pent-up demand and the power of generating awareness to unlock it in our own trading results. CarTrawler recently ran a mobility CRM campaign with a major airline partner to drive awareness of their mobility offering resulting in a **220% increase in bookings**, illustrating the untapped potential in this market.

**+220%**  
increase in bookings



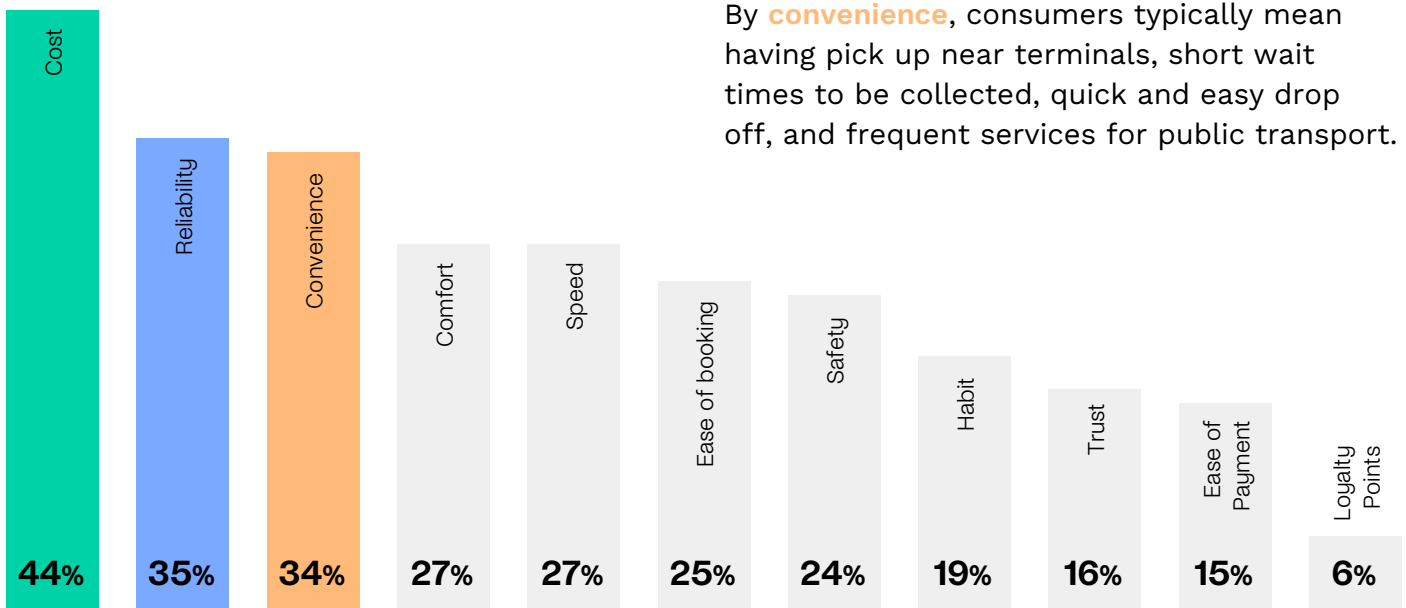
# 4 Top Priorities for Airport Mobility Consumers

44% of respondents across all markets say that **cost is one of their top 3 most important criteria** when selecting a mode of transport to and from the airport with reliability coming second, closely tied with convenience.

While **cost** is self-explanatory, particularly in times of higher prices for car rental, fuel and beyond, let's break down specifically what customers are looking for in relation to reliability and convenience.

By **reliability**, consumers typically mean that a transfer shows up at the right time to arrive at the airport on time, that it will be at the agreed airport pick-up location, or transfer driver will be there even if their flight is delayed, or that a rental car is at the airport when the consumer arrives to collect it.

By **convenience**, consumers typically mean having pick up near terminals, short wait times to be collected, quick and easy drop off, and frequent services for public transport.



## 23%

of consumers said guaranteed pick-up times and free wait time being included are some of the top 3 things that would make them consider the option in future





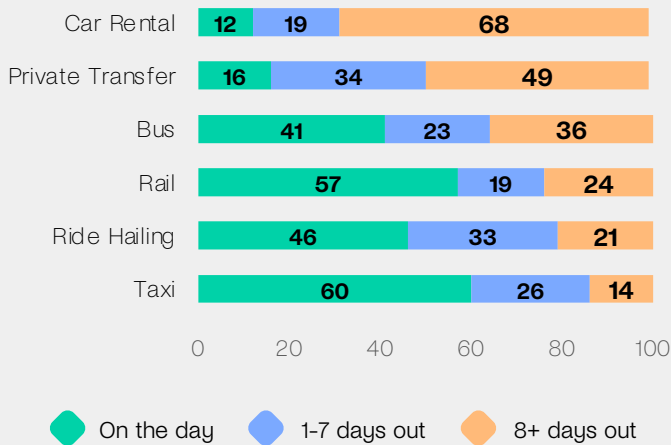


# 5 The Customer Journey is Long, Complex & Varied...

The customer journey for airport mobility is **long, complex, and varies significantly** depending on the mode of transport.

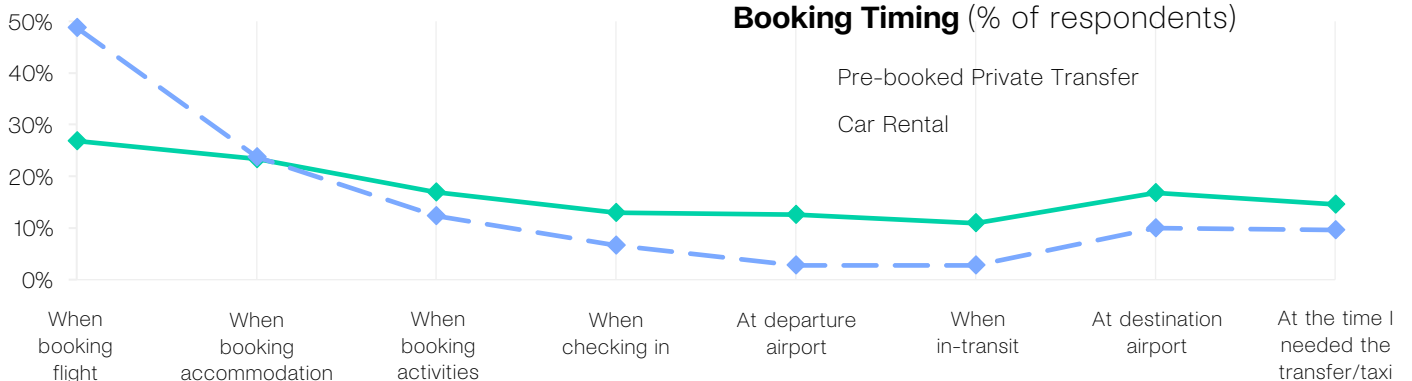
**Private transfer** is typically booked well in advance, though on average it's later than car rental bookings.

**Bus, rail, ride-hailing & taxi** are booked much nearer to time of journey; requires targeting customers very close to time of departure.



## Key Decision Points: Pre-booked Private Transfer vs Car Rental

Bookings for private transfers are more spread out over key decision points than car rental, where 50% of bookings are at the same or similar time to the flight.



Note: Data for North America and Europe Only





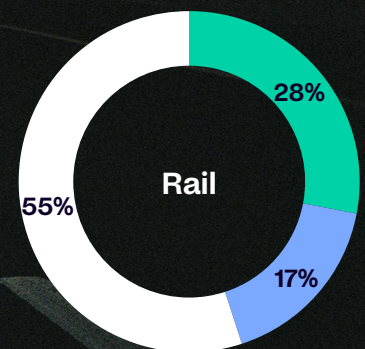
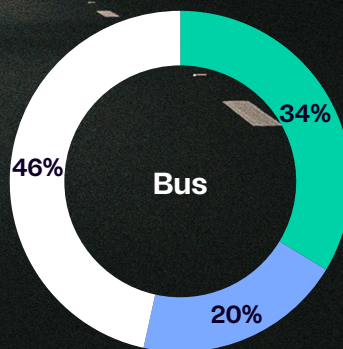
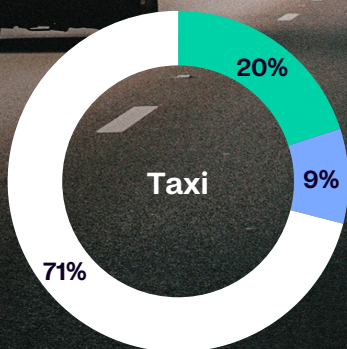
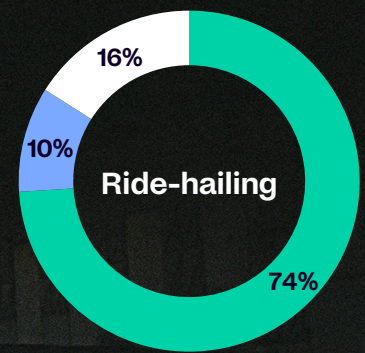
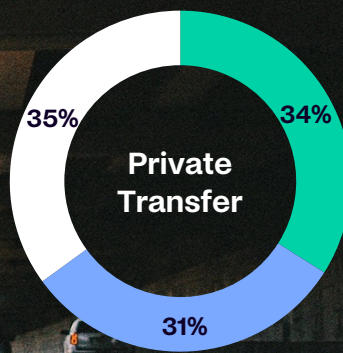
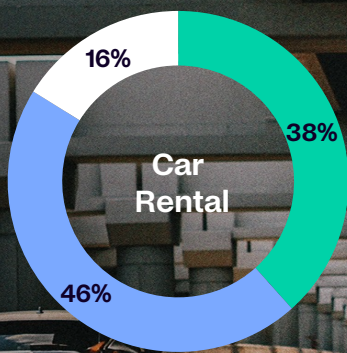
# ...And It's Also Omni-channel

The customer journey is omni-channel, with **mobile and desktop platforms both important** – depending on the mode of transport.

**Private transfer** has a slightly lower digital penetration compared to car rental (largely driven by higher telephone penetration) but is still high at **60%+**, however, the mobile to desktop mix is similar with desktop therefore remaining important.

**Ride-hailing app** bookings, as expected, are almost exclusively made via app.

**Bus, rail and traditional taxi bookings** are much more offline, with the in-person share particularly notable, tying in with the more last-minute nature of bookings for these modes. For the same reason, the mobile share of the digital proportion is more material as bookings are more likely to be made on-the-go.





# Key Takeaways



There is a **material opportunity** for OTAs, Airlines, Hotels and Travel Management Companies to gain from addressing the airport mobility market beyond car rental.

Consumer demand exists to cross-shop airport mobility along with flights and accommodation but currently there is limited awareness that the option exists. **Prominent positioning and promotion** are required to seriously target this opportunity.



Delivering a proposition that is both **extremely reliable and price competitive**, and merchandizing this in a way that is compelling to consumers, is critical to achieving the successful deployment of mobility options to customers.

Realizing the mobility opportunity requires a sophisticated **understanding of the consumer journey** to ensure the right content is delivered at the right time via the right platform, to maximize revenue and conversion. In particular, post-booking cross-sells need to be a focus.





# How CarTrawler Helps You Unlock the Mobility Opportunity

CarTrawler is the leading B2B technology provider of car rental and mobility solutions to the global travel industry. Our purpose is **Driving Successful Partnerships.**

CarTrawler's end-to-end technology platform expands our airline and travel partners' offering to their customers, creating substantial ancillary revenue opportunities. We provide unrivalled breadth and depth of content worldwide, including car rental, private airport transfer & ride-hailing services.

CarTrawler creates innovative, data-led solutions for some of the largest travel brands in the world. As a B2B company, we focus solely on helping our airline and travel partners build their brands, not our own.

**easyJet**

**UNITED**

*Alaska*

*hopper*

**Uber**

**RYANAIR**

**Hotels.com**

**KLM**

**transavia**

**vueling**

**eDreams ODIGEO**

**Wizz**

**TAP** TAPPORUGAL

**Travix**

**SWISS**

**Eurowings**

**Austrian**

**brussels AIRLINES**

**Emirates**

**AMERICAN EXPRESS**

**norwegian**

**HAWAIIAN AIRLINES**

**CopaAirlines**

**WESTJET**

Want to explore the mobility opportunity for your business?  
**Talk to CarTrawler today.**

**Get In Touch**





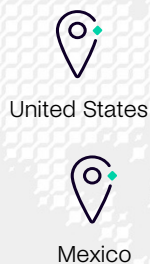
# Methodology

CarTrawler conducted global, proprietary research across the car rental and mobility market. We partnered with **Dynata**, the world's leading first-party data platform, to conduct this research.

The research took the multi-modal options into account, such as car rental, private transfer, on-demand, taxi, shuttle, rail & bus.

The research was carried out via an online questionnaire across 5 markets: the US, UK, Germany, Spain and Mexico. These indicator markets were chosen using k-mean clustering techniques to ensure good coverage of each region was achieved and so that results could be extrapolated to similarly behaving clusters where needed.

Audiences surveyed included a nationally representative sample, recent flyers and recent mobility users.



**11,500+**  
Global Respondents





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