

Demand analysis

July 2021



Approach

Corporate demand

Big data tools

Outcome RTM demand list

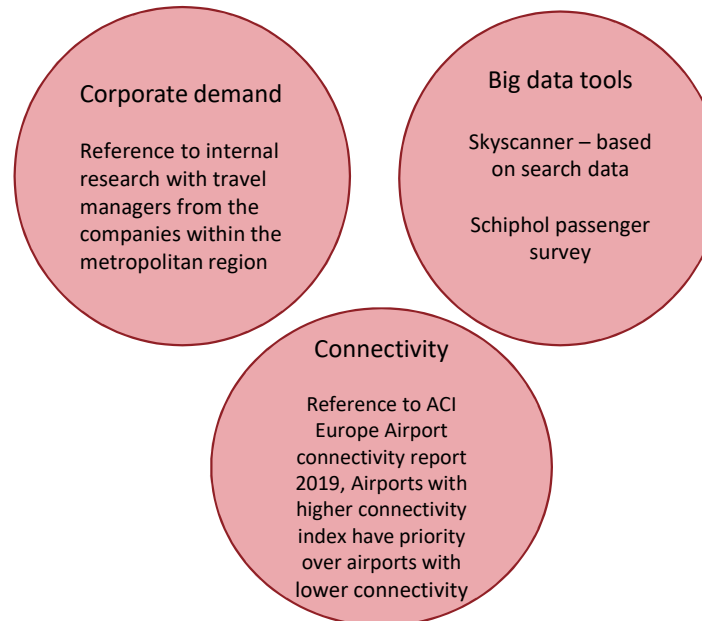
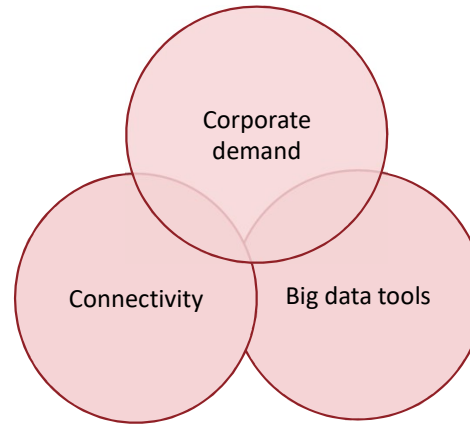


Approach

Additional slot criteria are being introduced by ACNL, in line with the WASG (Worldwide Airport Slot Guidelines)

Our approach is to identify regional demand by finding the optimal balance between corporate demand in the region and demand derived from big data tools

Limited to range of 3.000km and excluding short range HSL train-destinations



Big data tools

Schiphol passenger survey

- Based on passengers departing from AMS, but originated in the catchment area of RTM
- Travel period: 2019
- Different travel motives
 - NL business
 - Foreign business
 - NL leisure
 - Foreign leisure
- Selection is top-20 business passenger (NL+Foreign)
- Excluding train destinations (air-rail agenda, striked out)

#	IATA	Destination business passengers
	LHR	London/Heathrow
1	MAD	Madrid/Barajas
	LGW	London/Gatwick
2	MAN	Manchester/Int'
3	BHX	Birmingham/Int'
4	MUC	Munich/Franz Jo
5	CPH	Copenhagen/Kastrup
	LTN	London/Luton
6	DUB	Dublin
	LCY	London/City
7	BCN	Barcelona
8	MPX	Milan/Malpensa
9	ZRH	Zurich/Kloten
10	HEL	Helsinki/Vantaa
11	VIE	Vienna/Schwecha
12	OTP	Bucharest/Otopeni
13	GVA	Geneva/Cointrin
14	HAM	Hamburg/Fuhlsbuttel
15	LIS	Lisbon
16	NCE	Nice/Cote d'Azur
	TXL	Berlin/Tegel
	STN	London/Stansted
17	ARN	Stockholm/Arlanda
	FRA	Frankfurt/Main
18	OSL	Oslo/Internatio
19	WAW	Warsaw/Okecie
	CDG	Paris/Charles de Gaulle
20	FCO	Rome/Fiumicino
	BRS	Bristol/Lulsgat
	LIN	Milan/Linate
	BUD	Budapest/Ferihe
	PRG	Prague/Ruzyně
	BSL	Basel/Mulhouse
	ATH	Athens
	BLL	Billund
	SXF	Berlin/Schönefeld
	VCE	Venezia-Tessera
	SVO	Moscow/Sheremet
	IST	Istanbul/Ataturk
	SOU	Southampton/Eas

Survey corporate demand

The Business Travel Mobility Club is a Dutch initiative bringing together travel and mobility professionals. Via the BTM Club we have done research, by sending out a survey to these professionals. In the survey, we inquired into the destination needs of corporate companies. The results of the survey are presented in the table. Destinations in the air-rail agenda are striked out. Selection in top-12

Organisations / Companies of importance in our catchment area

- Dutch Government
- Siemens
- Allianz
- Unilever
- Boskalis
- Van Oord
- Port of Rotterdam
- Robeco
- Procter and Gamble
- Vopak
- EY
- IKEA
- Shell
- European Patent Office
- Damen Shipyards
- Allseas
- Anthony Veder

European destinations

Aberdeen
Birmingham
Manchester
Copenhagen
Stockholm
Hamburg
Munich
Rome
Poznan
Valleta
~~London Heathrow~~
Liverpool
~~Frankfurt~~
Paris
Bristol
Gdansk
Prague
Vienna
Bilbao
Barcelona
Milan
Vigo (Spain)
Santiago (Spain)
Venice
Glasgow
Podgorica
Geneva

Big data tools

Skyscanner

- Based on passenger searches from the Rotterdam area
- Point of sales: Rotterdam + 55km - Excluding Amsterdam, Amstelveen, Hoofddorp, Haarlemmermeer, Haarlem, Aalsmeer (10km catchment for each of the cities excluded)
- Travel period: 2019
- Flight radius 3.000 km
- Trip origins: RTM, AMS, EIN, BRU
- Selection is top 15

Data shows how many passengers searched from Rotterdam area via Skyscanner. Since all of destinations are not served from Rotterdam, passengers have used other airports to reach their destinations.

Cities	Origin city	Destination city	Total searches *
Amsterdam-Adana	Amsterdam	Adana	55.043
Brussels-Kayseri	Brussels	Kayseri	41.398
Amsterdam-Sarajevo	Amsterdam	Sarajevo	39.344
Rotterdam-Budapest	Rotterdam	Budapest	32.318
Rotterdam-Porto	Rotterdam	Porto	32.146
Rotterdam-Ankara	Rotterdam	Ankara	31.220
Amsterdam-Tromso	Amsterdam	Tromso	29.629
Rotterdam-Seville	Rotterdam	Seville	29.389
Amsterdam-Samsun	Amsterdam	Samsun	28.706
Rotterdam-Prague	Rotterdam	Prague	27.485
Amsterdam-Ordu-Giresun	Amsterdam	Ordu-Giresun	25.939
Amsterdam-Nevsehir	Amsterdam	Nevsehir	24.720
Amsterdam-Melilla	Amsterdam	Melilla	23.752
Amsterdam-Skopje	Amsterdam	Skopje	22.619
Rotterdam-Marrakech Menara	Rotterdam	Marrakech Menara	21.615
Rotterdam-Athens	Rotterdam	Athens	20.779
Rotterdam-Izmir	Rotterdam	Izmir	20.407
Brussels-Konya	Brussels	Konya	20.304
Amsterdam-Chisinau	Amsterdam	Chisinau	19.644
Amsterdam-Sivas	Amsterdam	Sivas	19.165

* Data shows how many passengers searched from Rotterdam area via Skyscanner

Summary – RTM demand list

This demand list is composed by combining the 3 different surveys: SPL passenger survey, corporate demand and Skyscanner
Double entries are removed (from left to right) and short-range HSL train destinations (air-rail agenda) are excluded.
Currently served destinations are included.

SPL passenger survey

MAD - Madrid
MAN - Manchester
BHX - Birmingham
MUC - Munich
CPH - Copenhagen
DUB - Dublin
BCN - Barcelona
MIL - Milan
ZRH - Zurich
HEL - Helsinki
VIE - Vienna
BUH - Bucharest
GVA - Geneva
HAM - Hamburg
LIS - Lisbon
NCE - Nice
STO - Stockholm
OSL - Oslo
WAW - Warsaw
ROM - Rome

Additional corporate demand

ABZ - Aberdeen
POZ - Poznan
MLA - Valletta
LPL - Liverpool
BRS - Bristol
GDN - Gdansk
PRG - Prague
BIO - Bilbao
VGO - Vigo
SCQ - Santiago (Spain)
VCE - Venice
GLA - Glasgow

Skyscanner

ADA - Adana
ASR - Kayseri
SJJ - Sarajevo
BUD - Budapest
OPO - Porto
ANK - Ankara
TOS - Tromso
SVQ - Seville
SZF - Samsun
OGU - Ordu-Giresun
NAV - Nevsehir
MLN - Melilla
SKP - Skopje
RAK - Marrakech
ATH - Athens

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