

D.T1.3.9. POZNAN REPORT ON PASSENGERS MOBILITY

Survey and Report Ławica Airport passengers

Version 1
06 2018





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1. Introduction

The survey of Ławica Airport passengers was carried out as part of the Interreg LAirA project "Landside Airport Accessibility" implemented by the City of Poznań (duration: 2017 - 2019). In addition to the passenger survey, the project also involved a survey among airport employees. Recognition of current practices and passenger preferences in terms of accessibility to Ławica Airport is one of the elements of the diagnosis that is part of LAirA's project objectives, which include searching for new, effective and low-emission solutions in the field of communication accessibility of airports.

The research focused on travellers using the Ławica Airport in Poznań. The interviews were conducted on the following days of the week (from Monday to Saturday), from 9 to 19, in the public area of the airport terminal. The assumption was made that the research sample should be evenly distributed on particular days of the study. The interviews were conducted in both departure and arrival halls, so as to ensure at least 25% of arriving passengers in the sample.

The investigated population comprised passengers traveling through Poznań-Ławica Airport (both arriving and departing). Interviews were conducted in two language versions: Polish and English in the course of three weeks. A total of 1011 effective interviews were carried out and entered into the database. The study was conducted using the questionnaire interview technique. Respondents were recruited randomly by interviewers conducting interviews - no significant percentage of refusals were noted, and due to the relatively short questionnaire, only occasional interviews were interrupted by the respondent. Table 1 presents the schedule of the completed study.

Table 1. Fieldwork execution in subsequent days.

	Frequency	Cumulative percent
28.04.2018	74	7,3
30.04.2018	75	14,7
02.05.2018	60	20,7
04.05.2018	87	29,3
05.05.2018	78	37,0
07.05.2018	77	44,6
08.05.2018	73	51,8
09.05.2018	78	59,5
10.05.2018	77	67,2
11.05.2018	81	75,2
12.05.2018	82	83,3
14.05.2018	86	91,8
15.05.2018	83	100,0
Total	1011	



2. Survey results

2.1. Passenger stream characteristics

In the course of the interviews, some basic socio-demographic characteristics of the respondents were recorded, and the percentage distributions are presented in the tables and on the chart below.

Table 2. Passenger stream according to gender (in %).

		Percent
Gender	Female	49,8
	Male	50,2

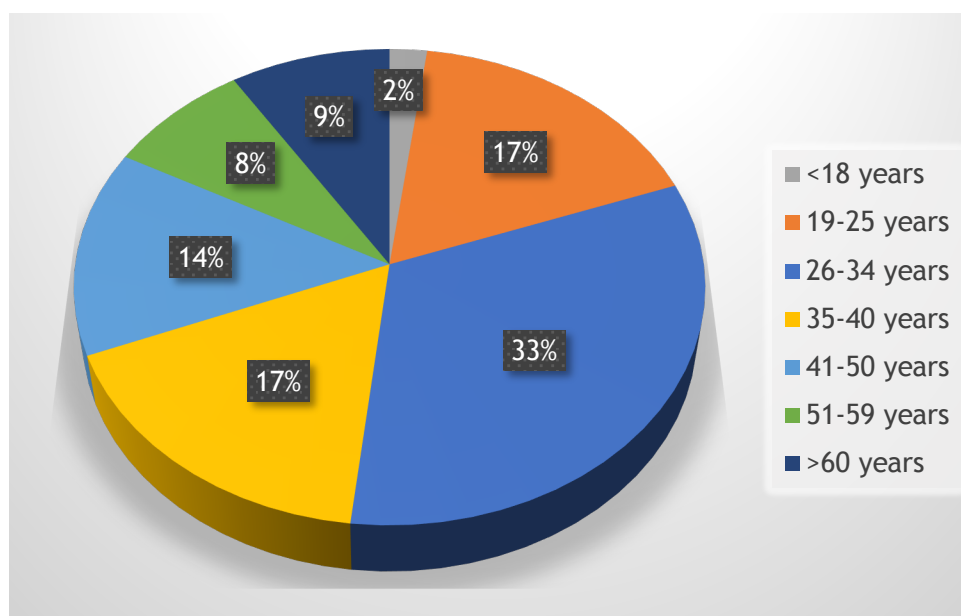


Chart 1. Passenger stream according to age category (in %).

The sample was balanced with respect to gender, while in terms of age diversity, the largest share in the passenger stream was of people aged 26 to 34. It should be noted that the share of people under 18 years of age among passengers is underestimated due to the fact that interviews with children were not carried out within this project.

Table 3. Declared education level of respondents (in %).

Education	Percent
Primary	2,4
Vocational	6,3
Secondary	31,4
Higher	59,9

Among the respondents, there were very few people who declared their level of education to be lower than secondary, which is probably due to the fact that air travel is less likely for people with low socio-economic status, and that the vast majority of passengers are people under 40, among which a definitely higher share of people with at least secondary education is attested in Poland.



Table 4. Declared citizenship of respondents.

	Number
Polish	819
Ukrainian	36
British	33
German	20
French	12
American	11
Spanish	7
Danish, Dutch, Italian	6
Irish	5
Korean, Portuguese	4
Austrian, Belgian, Norwegian, Hungarian	3
Belarussian, Bulgarian, Lithuanian, Sudanese, Taiwanese	2
Azerbaijani, Filipino, Ghanaian, Greek, Georgian, Hindu, Indonesian, Israeli, Canadian, Kenyan, Colombian, Latvian, Macedonian, Armenian, Russian, Romanian, Samoan, Swedish, Turkish	1

The overwhelming majority of respondents (819) had Polish citizenship, 175 people were citizens of another country, and in rare cases (17) interviews were conducted with persons with dual citizenship. The distribution of responses is presented in the above table.

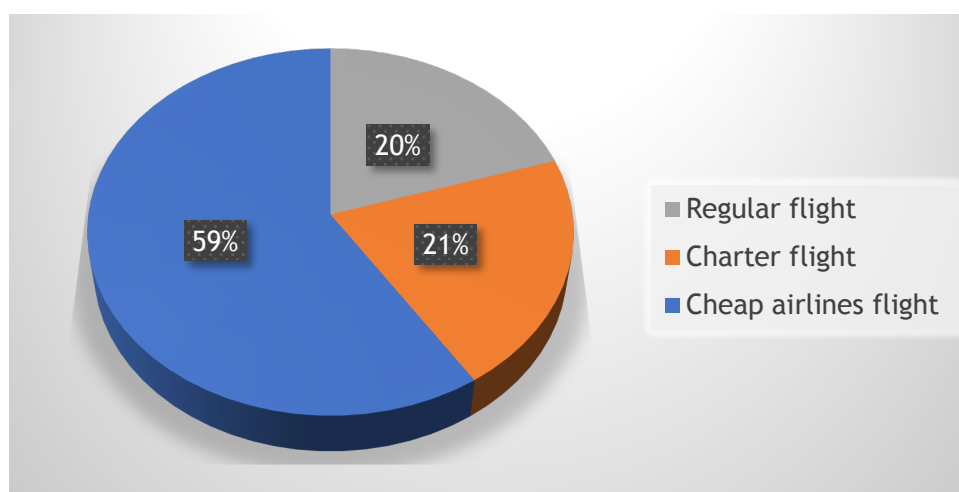


Chart 2. Types of airlines used within the current journey (in %.)

A sizeable majority of passengers at Ławica Airport use the services of low-cost airlines, while connections provided by traditional carriers are chosen only by one out of five respondents, this percentage is similar to that recorded in the case of charter flights. The division of passengers on the basis of the type of carrier used is unfortunately of only limited analytical use, because it is not known in what part of cases the particular travel event, within which the interview was conducted, reflects a typical form of traveling for a given person. Nevertheless, there are some differences between the three categories of passengers defined in this way, which have been emphasized in the subsequent parts of this study.



Graph 3 presents the differences between passengers using services of different types of carriers within the present journey and the frequency of air travel.

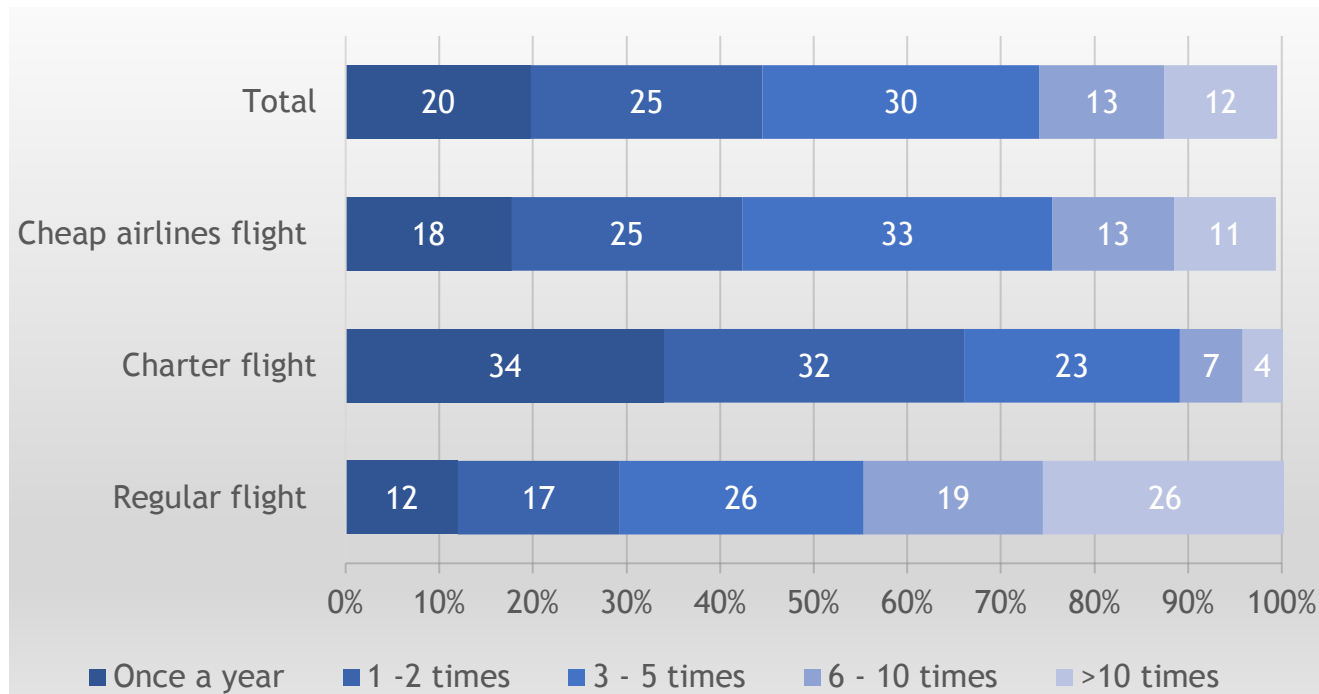


Chart 3. Frequency of air-travel relative to the type of carrier during the current trip (in %).

The distribution for low-cost passengers is the closest to the total distribution, which is due to the largest share of this travel-category in the passenger stream. However, a clear contrast occurs between passengers using regular lines, who declare a definitely higher than average frequency of travels, and passengers on charter flights, whose travel frequency is significantly lower.

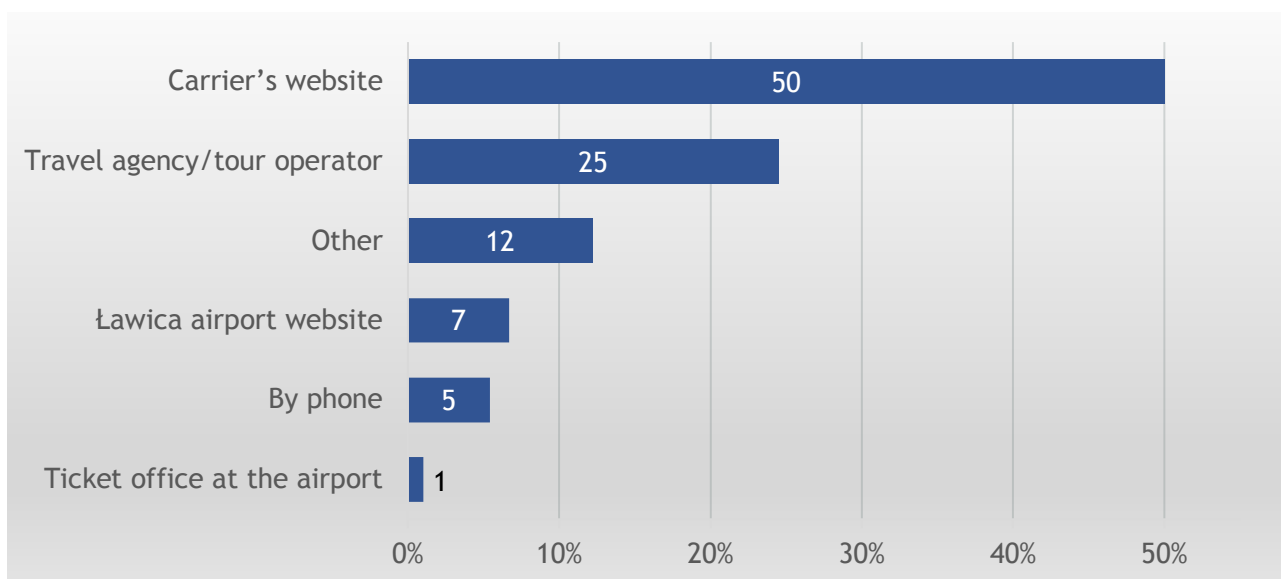


Chart 4. Ways of purchasing tickets (in %).

Carrier websites constitute the most commonly used ticket sales channel - one half of the respondents used this form. However, every fourth traveler made a purchase by a travel agency - this result was strongly boosted by passengers of charter flights, over 78% of whom declared a purchase of the ticket through a travel agency. Other options enjoyed a significantly lower popularity.

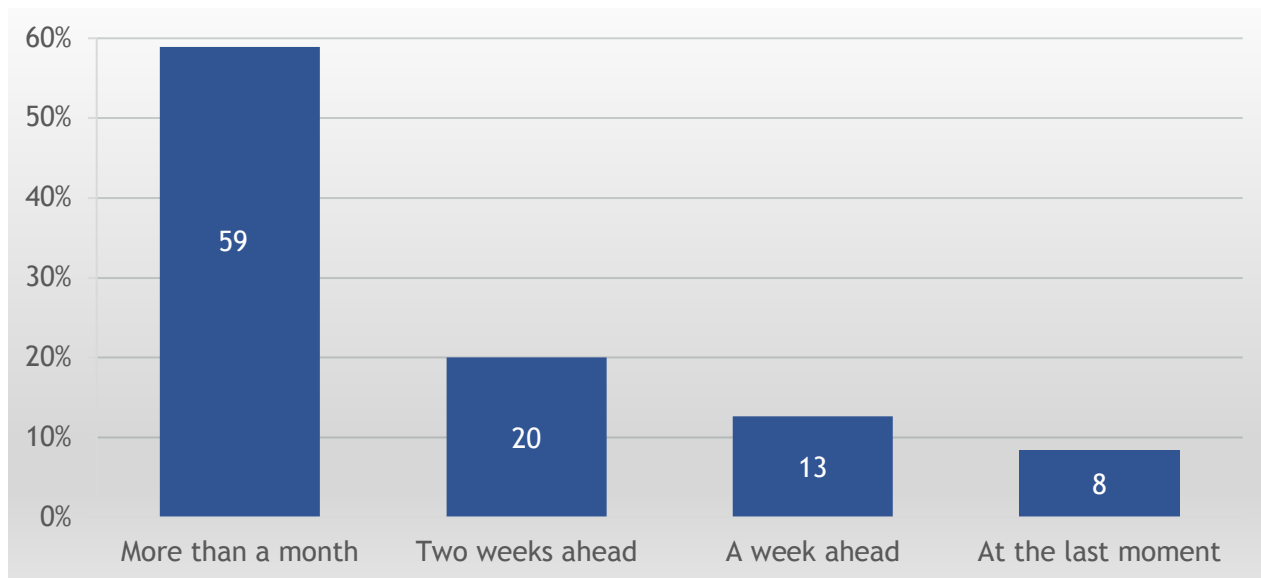


Chart 5. Purchase of tickets for the current trip (in %).

Only a small number of travelers buy tickets at a short notice - the vast majority do so at least a month before departure. Advance purchases are most often declared by passengers traveling with low-cost airlines and charter flights. A high percentage of persons declaring an early purchase of tickets was also recorded among persons buying tickets through websites of air carriers.

The most often mentioned motivation for choosing Ławica Airport was a direct connection to the expected destination. The fact that almost 2/3 of the respondents gave such an answer could be explained to a certain extent by the large share of passengers using low-cost carriers and charter flights.

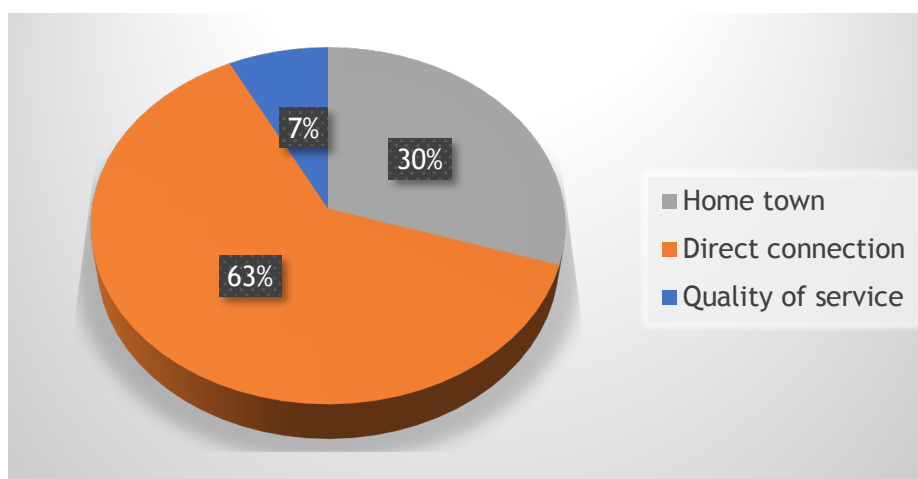


Chart 6. Reasons for choosing Ławica Airport (in %).

When it comes to the reasons for choosing Ławica Airport, almost one of three respondents pointed to the important role of a "home town" in deciding on this particular airport; this answer was selected by nearly 2/3 of people living in or around Poznań. The quality of services, on the other hand, enjoyed only a small amount of indications, which should thus be considered as a low-impact factor from the point of view of air travel planning from the Ławica Airport. Even if this dimension were to be highly rated, it will play a secondary role in comparison with the quality of direct connections and the proximity of the airport. For almost 2/3 of the passengers it is the availability of direct connections that counts most.



Tourism was the most frequently mentioned motivation for taking a trip, which was indicated by as many as 49% of respondents, followed by other goals, among which motivations related to family obligations occurred most often. This high proportion of tourist motivations clearly stems from the high percentage of charter-operated travel.

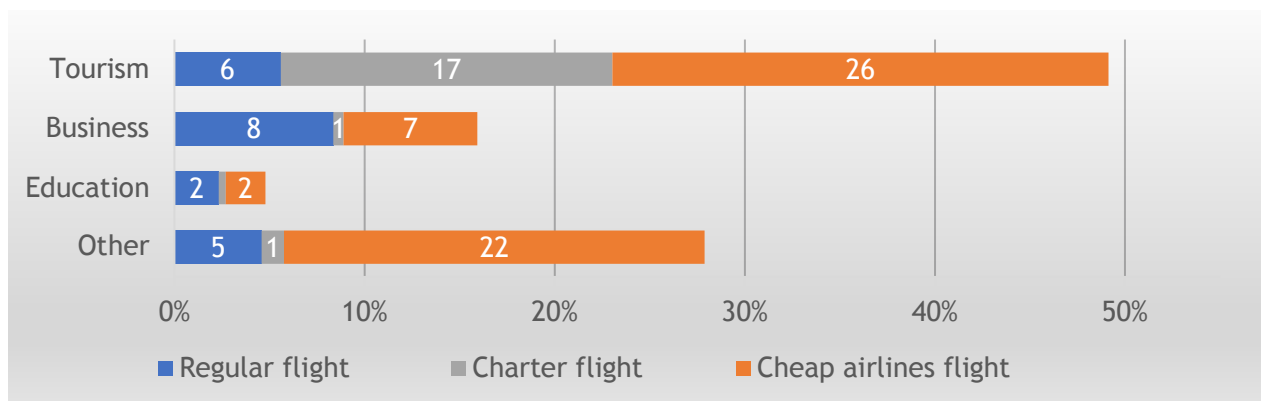


Chart 7. Purpose of travel (in %).

Among those traveling for tourist purposes the highest fraction would make use of low-cost airlines, while charter flights came second within this category. When it comes to the 49% of respondents declaring their travel to be aimed at tourism, only about one in ten was using the services of traditional airlines. On the other hand, chartered flights were hardly ever used by those declaring business or educational motivations - charter passengers travelled almost only as tourists. There was a relatively high percentage of respondents traveling for reasons other than those mentioned in the questionnaire - these trips were most probably involving family reasons, although they may have referred to other vocational duties that may not seem covered by the notion of “Business” (e.g., participation in conferences). Educational aims were only mentioned in very limited cases.

Respondents were also asked whether they used airports other than Ławica (located within a radius of 200 kilometres) due to the possibility of direct connection to the destination - the distribution of responses is presented on Chart 8.

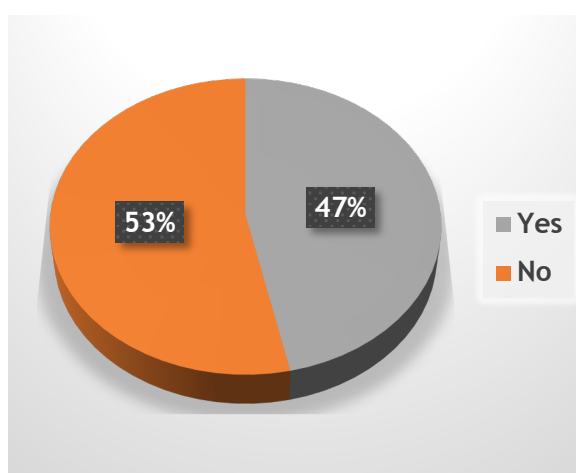


Chart 8. Using other airports than Ławica (within 200km) due to direct connections (in %).

Almost half of respondents declared that they used the offer of another airport, located within a radius of 200 km. It should be noted, however, that although there are a few airports within such radius - in Łódź, Bydgoszcz and Babimost, only Wrocław offers an attractive network of connections. On the other hand, both Warsaw and Berlin airports, frequently used by residents of Poznań and Wielkopolska, are located further than 200 km and therefore were not included in this question.



2.2. Passengers departing from Ławica Airport

According to the declared stage of the respondent's journey (arriving or departing), the appropriate group of questions was adjusted in accordance with the prepared questionnaire design. The division between the departing and arriving passengers is 61% and 39% respectively. The analysis of the results for these two groups of travelers is presented in chapters 2.2. and 2.3.

Among the passengers departing from Ławica Airport, which accounted for almost 61% of the research sample, almost 40% were people living in Poznań or within a radius of 50 km from the airport. On Chart 9, the answers to the question concerning accommodation on the night preceding the travel were presented.

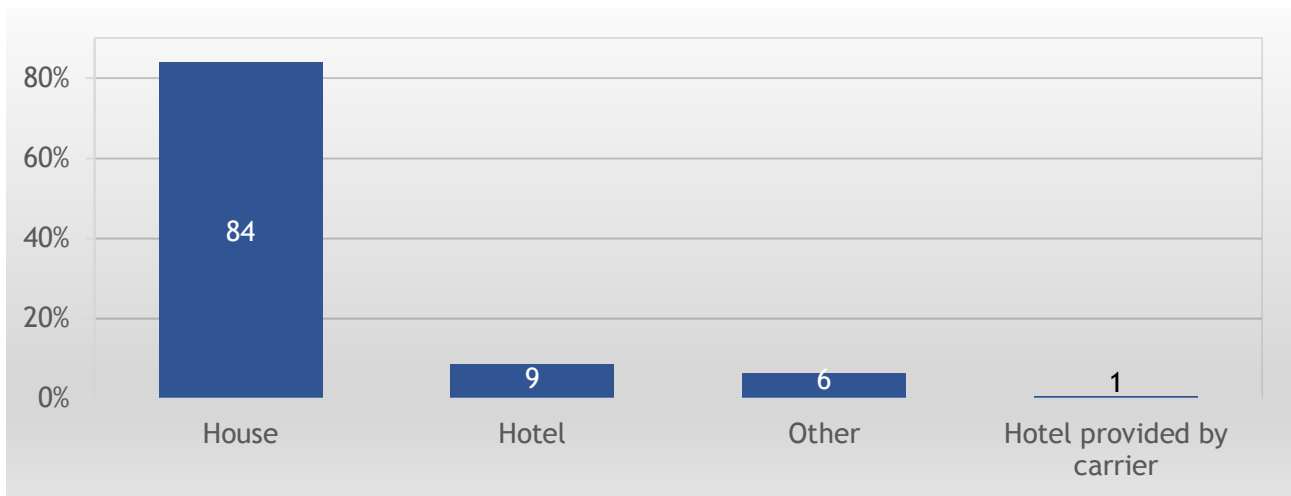


Chart 9. Last night spent by respondents before travel (in %).

The vast majority of respondents declared that they spent the night before the departure at home, and this result was particularly high among people living in or around Poznań.

The most often mentioned option for accessing the airport amounted to getting there by car or by a family lift, which also falls within the scope of individual transport. Taxi and Uber services came second, they were chosen by 23% of respondents - while only 17% of the departing passengers declared their arrival by means of public transport. Bicycling remains a marginally important means of transportation - this way of reaching the airport was only indicated by a few respondents. This seems to be an obvious consequence of the fact that the terminal lacks biking infrastructure - and especially does not have a base-station of the Poznan City Bike.

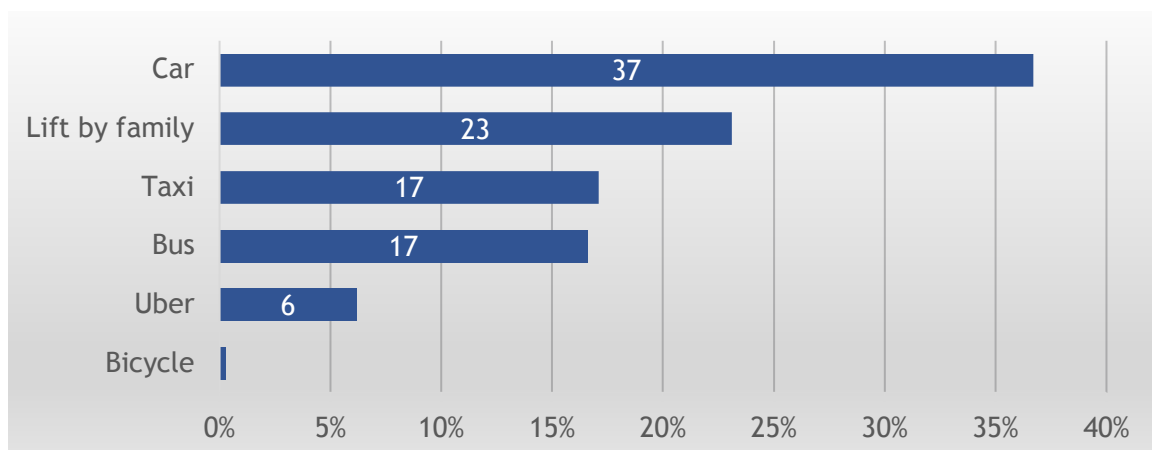


Chart 10. Means of getting to Ławica airport by respondents (in %).

On chart 11, the distribution of answers concerning the place where respondents tend to park their cars when coming to Ławica Airport is presented.

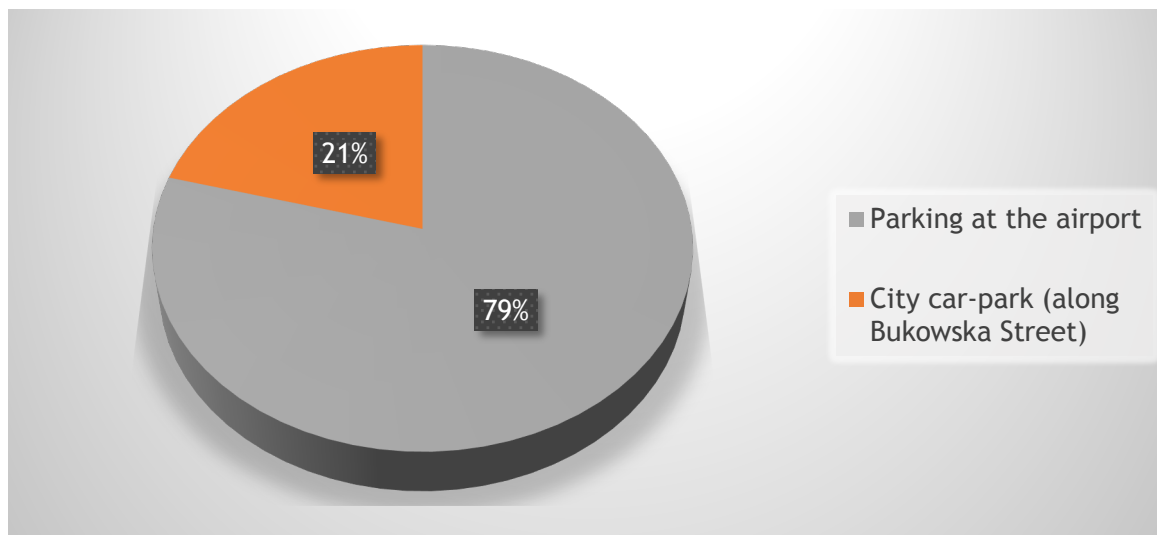


Chart 11. The use of car-parks (in %).

Among those declaring their arrival by car, the vast majority leave their vehicles at parking lots at the airport, and only about every fifth respondent uses city car parks.

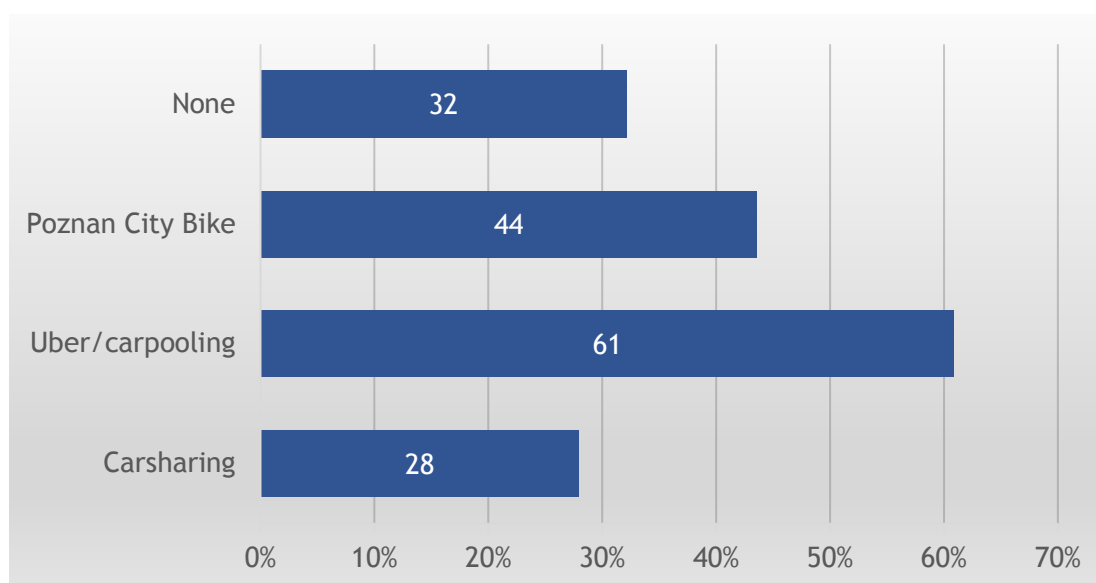


Chart 12. Awareness of alternative forms of transport to the airport (in %).

The Uber or Carpooling are definitely the best known alternative forms of transport - selected by 61% of respondents. However, it should be noted that this result is most likely a consequence of a high recognition of the Uber brand rather than a high knowledge of the idea of Carpooling. The recognition level of Poznań City Bike proves also very high, but in this case it is reasonable to assume that it is a widely recognised alternative form of urban transport, but maybe not necessarily to the airport. The share of bicycle trips is simply very low among passengers departing from the Ławica Airport.



On chart 13, the distribution of answers was presented to the question concerning the time when the passengers come to Ławica Airport ahead of departure.

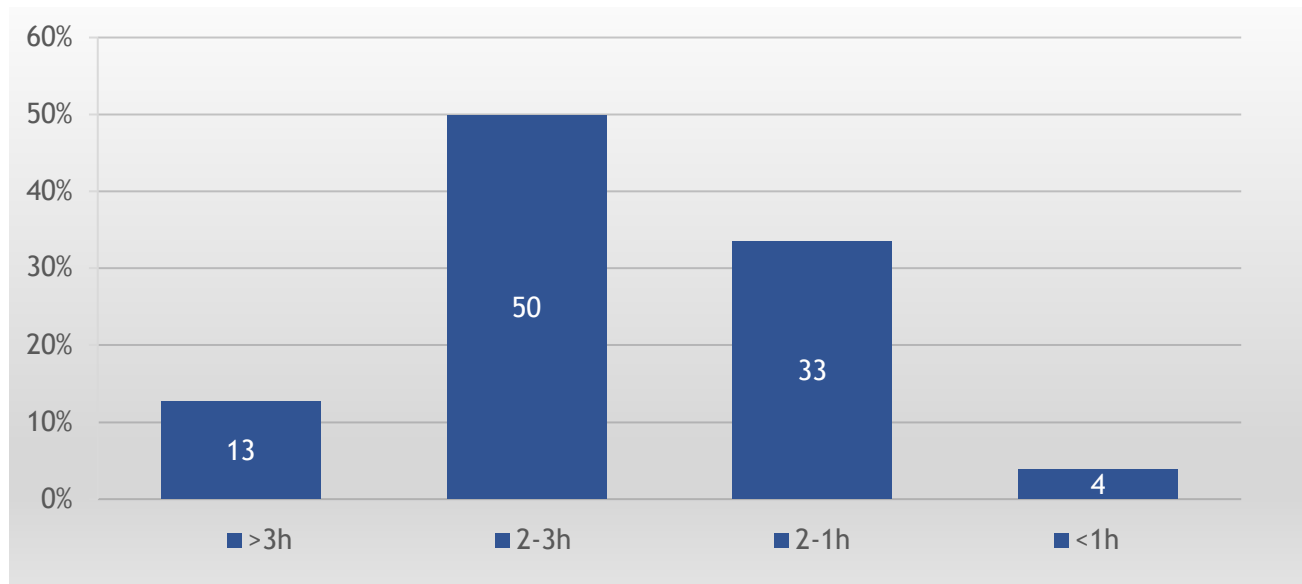


Chart 13. Arrival ahead of departure (in %).

The most frequent selection among the question options was the arrival at the airport 2-3 hours in advance of the departure time, while more or less every third respondent arrives at the airport 1-2 hours earlier. Very few respondents declared their arrival at the airport less than an hour before departure.

The respondents were also asked the question whether in their opinion the flights from Ławica Airport tend to operate according to schedule. The distribution of answers is presented on chart 14.

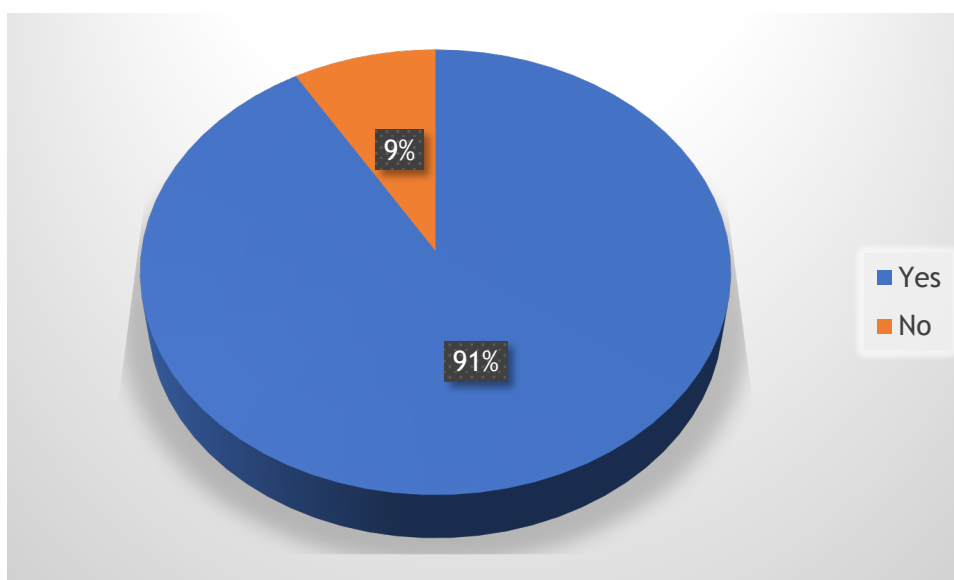


Chart 14. Flights according to schedule (in %).

According to the majority of respondents, the flights take place at Ławica Airport without major delays. This opinion prevails in all subgroups and proves independent of the declared frequency of air travel.



2.3. Passengers Arriving at Ławica Airport

The questions addressed to the passengers arriving at the Ławica Airport were answered by over 39% of respondents, just as in the case of passengers flying-in, around 40% of them were residents of Poznań or lived within 50 km of the airport area. It should also be noted that almost three-quarters of the respondents pointed to other forms of activity than those mentioned in the question frame, which in the vast majority of cases simply boiled down to traveling back home. This was reflected in the distribution of responses to the next question, which concerned the first overnight stay planned after arriving - the distribution of answers is presented on charts 15 and 16.

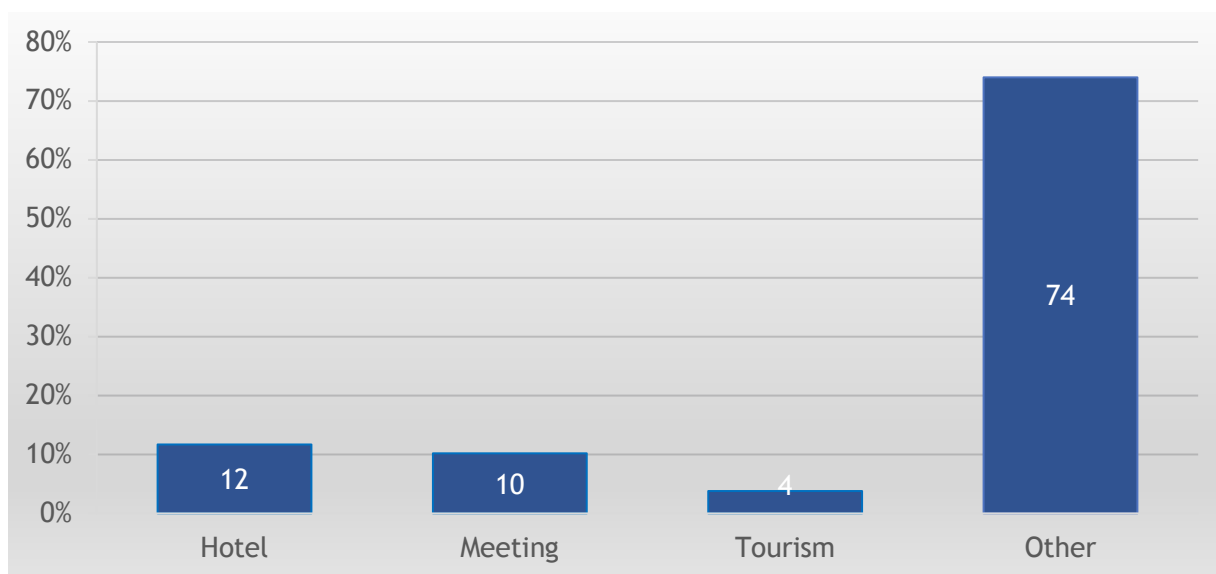


Chart 15. Planned activity after arrival (in %).

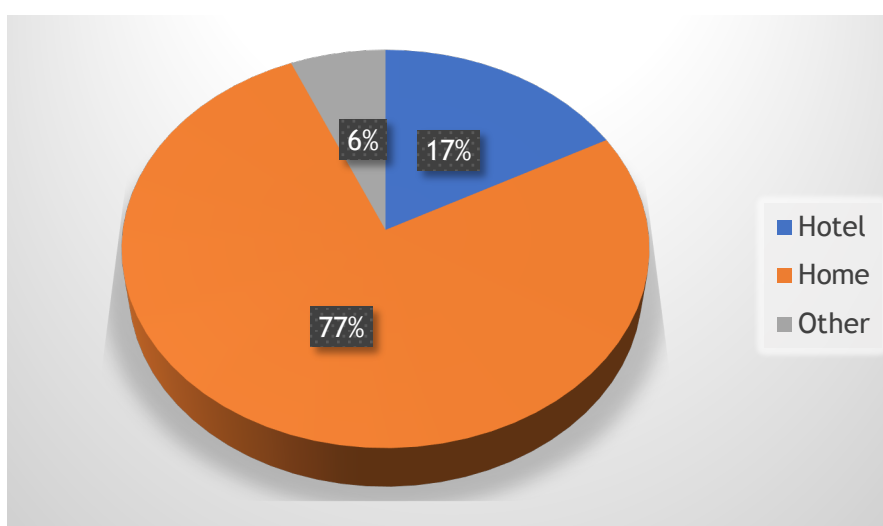


Chart 16. Planned overnight stay (in %).

Taking into account the distribution of responses to the question about planned overnight accommodation, it seems reasonable to assume that such a large percentage of responses other than "hotel", "meeting" and "tourist" resulted to a large extent from the fact that many passengers simply were about to travel to their own place of residence.



The question about the planned use of means of transport after arrival can not be directly compared to the answer to a similar, but not identical, question that was being asked to the departing passengers, but glossing over the differences resulting from the structure of both questions can point to specific similarities and contrasts between schedules. First of all, it should be noted that the most frequently declared means of transport was the use of a car. In the case of a question addressed to the departing passengers, there was also a possibility of answering "a lift by the family", which could in most cases also mean a car trip. Taking such an assumption, the share of car travel among passengers arriving rather than departing would be significantly lower. The share of passengers using taxi services (Taxi or Uber) is similar in both groups, while the percentage of people declaring their use of the bus is clearly higher among those arriving in Poznań.

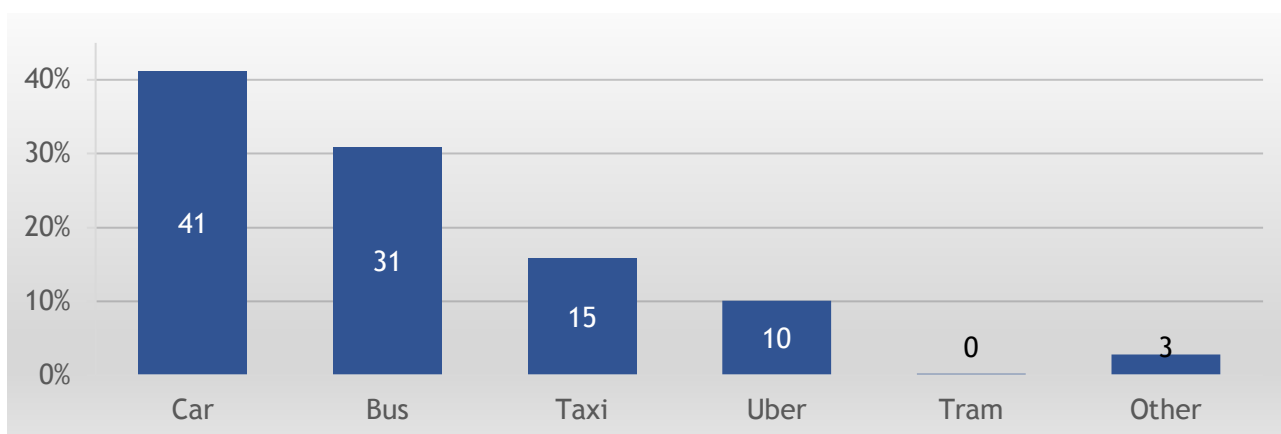


Chart 17. Means of transportation used to access the airport (in %).

In the case of arriving passengers, the distribution of answers to the question concerning the awareness of alternative forms of transport was very close to the opinions expressed by departing passengers. The highest percentage of respondents knew the Uber brand, and the knowledge of Poznań City Bike was also high. In the case of a city bike, one may also assume that some of the indications may have resulted not in the knowledge of the solutions implemented in Poznań, but rather in the knowledge of what urban bicycle systems are.

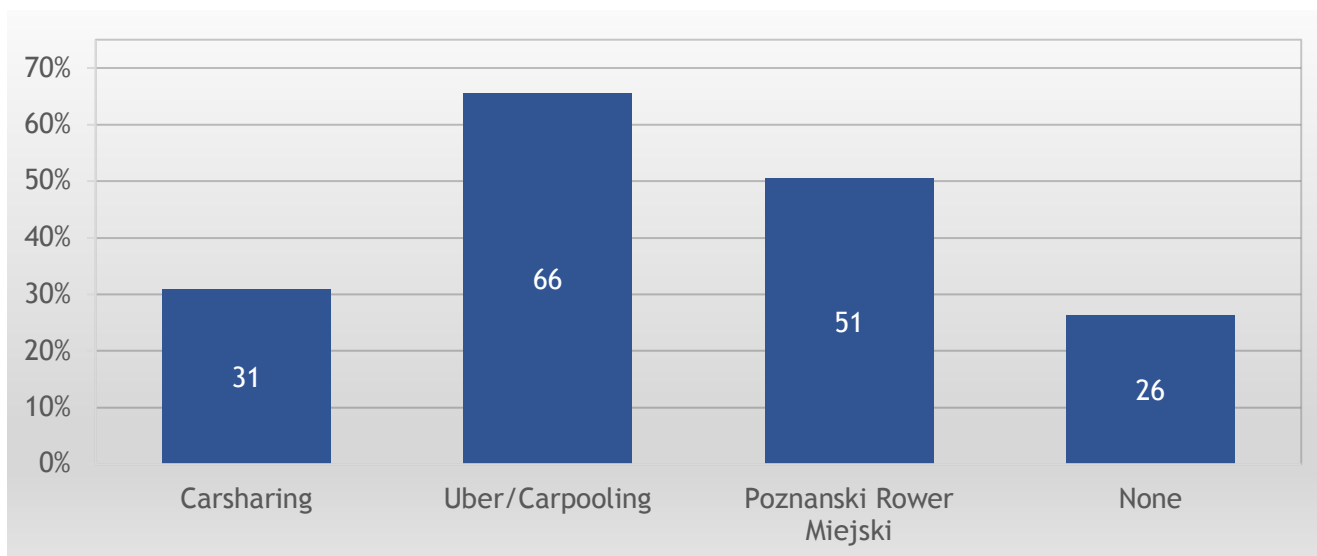


Chart 18. Alternative means of transportation (in %).



2.4. Opinion on desired applications and services

Considering mobile applications, the popularity of two of them is clearly dominant: Uber and Jak dojadę. The other options had only a small frequency of indications. It should be noted, however, that a bulk of the “Other” answers referred to the use of mobile applications aiding navigation, such as Google Maps.

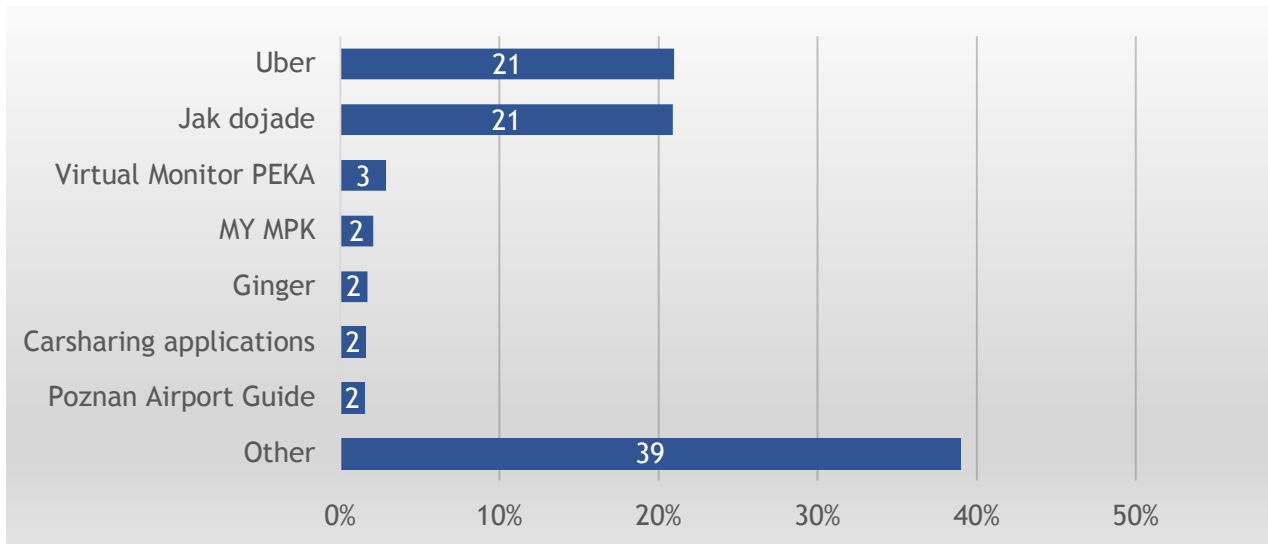


Chart 19. The use of mobile applications (in %).

Respondents were asked further questions about 1) using the existing Poznań Airport Guide, 2) willingness to travel to the city centre using a direct train connection from Poznań Główny station to Poznań Ławica, and 3) readiness to use the mobile application dedicated solely to the airport, which would facilitate transport accessibility of the airport. The distribution of responses to these three questionnaire questions is presented on the chart 20.

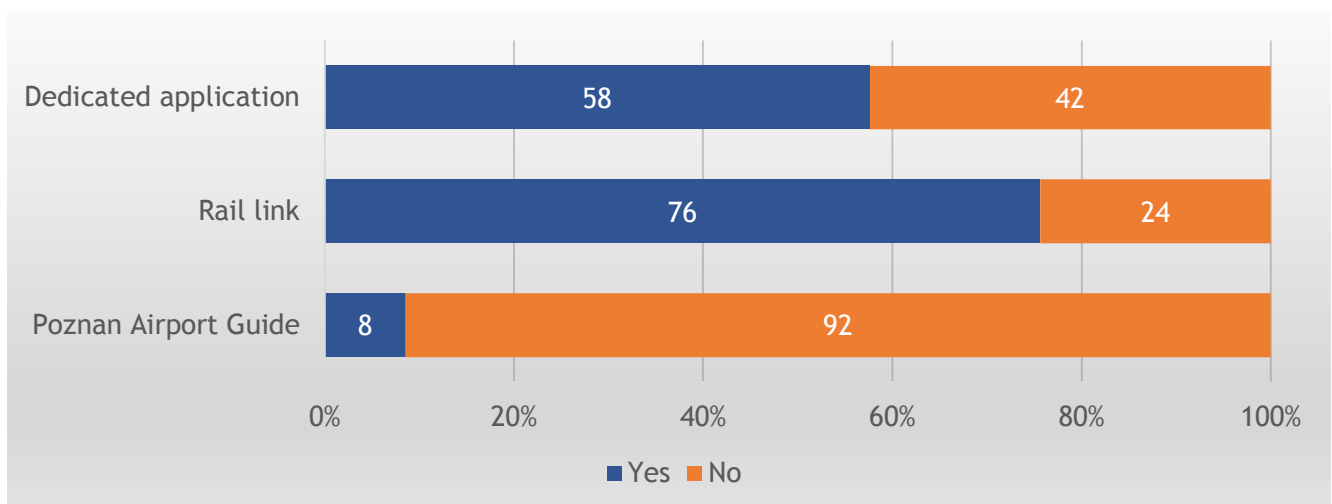


Chart 20. Expectations concerning new services and applications.

Regarding the new solutions expected by passengers, the suggestion of opening a railway connection to Ławica Airport terminal was definitely very popular. Most of the respondents also declared an interest in a dedicated application of Ławica Airport, whereas, similarly to the previous question, the popularity of the existing Poznań Airport Guide was very low even if directly probed. It should also be noted that when it comes to “other applications” these answers mostly concerned navigation applications such as Google Maps, which are used to assist getting to the airport.

Respondents were also asked to indicate the main factor shaping their way of travel - the distribution of answers was presented on chart 21.

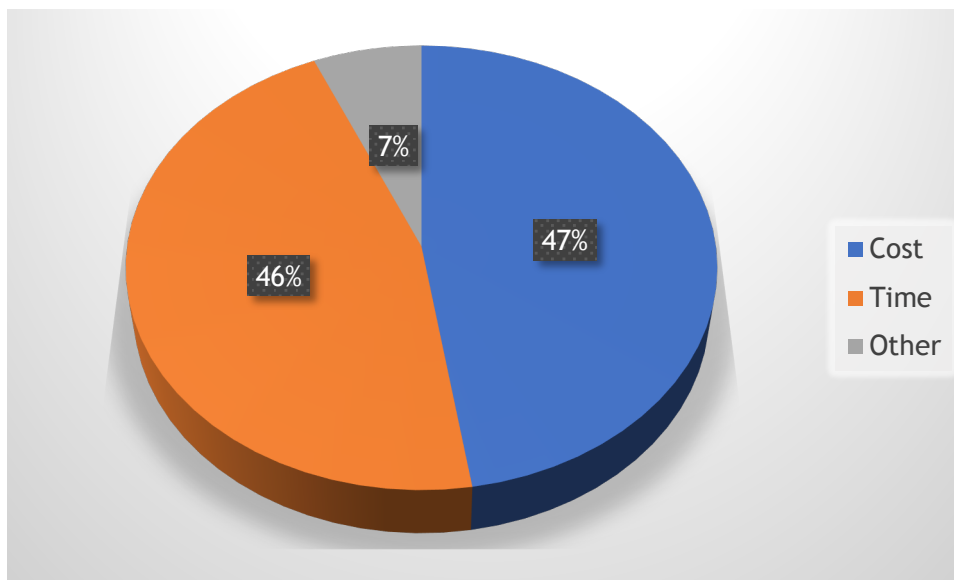


Chart 21. Decisive factors in choosing carriers (in %).

The questionnaire structure forced one and only one indication. Answers were arranged symmetrically between persons indicating the key importance of time saving and people emphasizing the importance of travel costs.

The last question asked in the course of the interview concerned whether the passenger used a car rental company at the airport - the results were presented on chart 20.

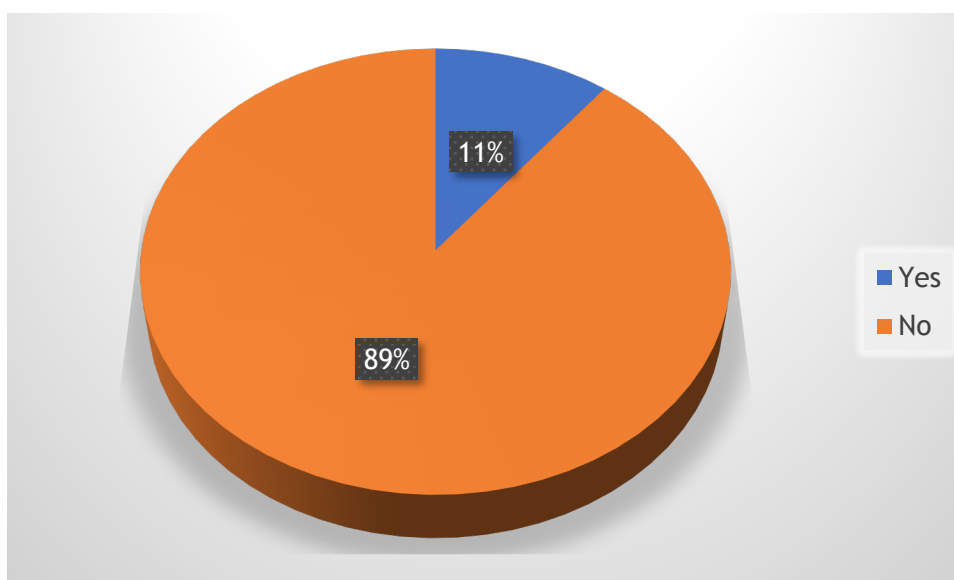


Chart 22. The use of car-rental by respondents (in %).

The vast majority of respondents never used car-rental services at Ławica Airport, which likely results from a large share of passengers living in Poznan, as well as a short distance separating the airport from the city center. On top of that, it seems clear that the preponderance of low-cost and charter-flight passengers translates into the low popularity of car rental, which constitutes an expensive means of transport in comparison to the public transport infrastructure.



Towards the end of the interview, the respondents were asked an open question about whether they perceive any other problems related to the transport availability of the airport. Among the opinions expressed, the issues related to matters discussed earlier in the course of the interview prevailed. The vast majority of the respondents did not notice significant and specific obstacles, but four main problem threads emerged among the reported issues:

- A significant number of respondents stated that the Ławica Airport could use a railway connection or a non-collision tram connection with the Poznań Główny railway station. These opinions were motivated not only by the ease of access to the center, but also by the speed of access to railway connections: "I have about 90 km to the house, so someone must pick me up, the connection between Ławica and PKP would be great."
- Some passengers also spoke critically about the operation of public transport to the airport: first of all, it was pointed out that the bus 59 runs very rarely and travels much longer than the previously running express bus L (this opinion happened to have been prominently voiced by the airport employees surveyed in the parallel project).
- Opinions were also voiced that the airport should be reached by more than one bus line to allow direct access to other parts of the city. There were also voices that signage and information concerning the possibilities of traveling by public transport are insufficient.
- Furthermore, not all respondents were satisfied with accessing the airport by car, apart from the complaints about traffic jams, the high costs of car park were quoted reasons for disapproval. The dissatisfaction with the costs of parking was also connected to the fact that according to some respondents the time of free parking is too short, which in their opinion can be easily exceeded and then result in a fine which is disproportionately high in comparison to the fees.



3. Summary

The survey allowed for learning the characteristics of passengers using the Ławica Airport, as well as exploring their opinions about services provided by the airport. In the light of the analyses carried out, the following findings should be singled out:

- Customers of low-cost airlines are most prevalent in the passenger stream, accounting for almost 60% of the total, and the remainder is equally divided between charter passengers and traditional carrier customers.
- The share of frequent-travellers is relatively low, and this percentage is significantly higher than the average among persons using the services of traditional carriers at the time of the study.
- Passengers departing from the Ławica Airport predominantly buy tickets way ahead of departure, i.e., over a month in advance - they most often use carrier websites or travel agency services. A particularly large share of travel agency clients are charter flights passengers.
- Taking into account the factors determining the use of the Airport services, the main thing is whether it offers direct connections - this opinion prevailed regardless of the motives of the journey.
- Both for arriving and departing passengers, the most commonly used means of transport is a passenger car. However, the share of public transport is higher among those arriving than departing.
- For people declaring their willingness to use a bicycle, it would be an attractive option to locate a City Bike Station next to the Terminal, from which short-distance commuters with hand-luggage only can use it. It should also be noted in this context that the survey conducted among airport employees demonstrated that City Bike could be an attractive alternative way of travelling to work for people living near the airport
- Passengers declare a relatively high level of familiarity with alternative forms of transport, and display an especially high brand awareness.
- The idea of introducing a railway connection to the airport terminal was very popular - 76% of respondents declared their readiness to use such a solution. This way of accessing the airport would not only be faster, in particular to those passengers commuting from outside of Poznań, but it would also be cheaper than the car access. It should be noted that the popularity of this solution is significantly higher among passengers (76%) than airport employees (62%).
- The mobile applications that are used most often by the respondents are Uber and Jak Dojadę. None of the other options turned out to be very popular. In the case of the application dedicated to the Ławica Airport there is a clear contrast between a general interest in and a relatively low level of the actual use of the existing Poznań Airport Guide application. Among the answers to the question, the most popular one was "other", which relates to the fact that the respondents also use other popular mobile applications other than the ones mentioned in the cafeteria, like e.g. Google Maps.



4. Questionnaire

The Poznan City Hall, or more precisely the Department of Transport and Greenery, is one of the partners of the European project Interreg CE 1074 – „LAirA” – accessibility of airports. One of the main assumptions of the project is to improve the accessibility of the Ławica Airport in terms of low-emission mobility. In relation to the above, we kindly ask you to complete this questionnaire in order to obtain an opinion on the above topic. We ensure that research is carried out anonymously with a voluntary approach and it will be used only for the purpose of developing the final strategic document. Please be honest with us and answer in the questionnaire below.

Test time (date, hour):.....

1. Type of travel:

- Regular flight
 Charter flight
 Cheap airlines flight (WizzAir, Ryanair)

2. Sex

- Woman
 Man

3. Age

- <18
 19-25
 26-34
 35-40
 41-50
 51-59
 >60

4. Education

- Elementary
 Vocational school
 High school
 University

5. Nationality

- Poland
 other

6. How often do you travel within a year?

- 1
 1-2
 3-5
 6-10
 >10

7. Have you ever used other airports than Ławica within a radius of 200 kilometers due to a direct connection from the neighboring airport to your destination?

- Yes
 No

8. How did you buy a plane ticket?

- Ławica airport website
 Ticket office at the airport
 By phone
 Carrier's website
 Travel agency/tour operator
 Other

9. When did you buy a ticket?

- Over a month ago
 Two weeks ago
 a week ago
 At last minute

10. Why did you choose a trip through Ławica?

- Home Town
 Direct connection
 Quality of service

11. What is the purpose of your trip?

- Business
 Education
 Tourism
 Another



12. Do you start a trip now, or you have just landed?

Start a journey

I've just landed

If you checked "start a journey" fill in the questions from the pool numbers 13 – 19, and 25-31! If you have chosen the second option, complete the questionnaire from question 20 to the end!

13. Are you a resident of Poznań (or the surrounding area up to 50 km from the airport)?

Yes

No

14. Where did you spend the last night before the trip?

House

Hotel

Hotel provided by the carrier

Another

15. What kind of transport did you choose to get to the airport?

Car

Bike

Bus

Uber

Taxi

I was picked up by someone from my friends

16. If you get to the airport by car, where did you leave it? If you have chosen another means of transport (skip the question)

Parking at the airport

Parking (at Bukowska street)

17. What time before the departure you are checking in the Airport?

>3 hours.

2-3 hours.

2-1 hours.

<1 hour

18. Are you aware that you can get to the airport using alternative means of transport? If so, select those that are known to you.

Carsharing

Uber/Carpooling

Poznań City Bike

No

19. According to your observations, Do you think that planes start on time (according to the flight schedule)?

Yes

No

20. Are you a resident of Poznań or the surrounding area (up to 50 km from the airport)?

Yes

No

21. Where are you going after landing?

Hotel

Meeting

Tourists

Another

22. Which means of transport you will choose to travel to your destination?

Bus

Taxi

Uber

Car

Bike

Tram

Another

23. Where will you spend the night?

Hotel

House

Another

24. Do you know that you can get to the airport using alternative means of transport? If so, select those that are known to you.

Carsharing

Uber/Carpooling

Poznan City Bike

No

25. What mobile applications do you use when travelling from the airport to the destination of your journey?

„Jak dojadę”

„Wirtualny Monitor - PEKA”

„Ginger”

„My MPK”

„Poznań Airport Guide”

„Uber”

„Aplikacje Carsharingowe”

Another



26. Have you ever heard or used Poznan Airport Guide mobile application? (application containing information about arrivals/departures, tram and bus timetables, availability of parking spaces, etc.)

Yes No

27. Would you be interested in to use the access to the city center (mail railway station) by direct train from Poznan Main Station to Poznan Ławica Station which would provide access to the destination from the station in the time from 10 to 15 minutes?

Yes No

28. Would you like to use a mobile application dedicated only to the airport (arrivals/departures+ transport schedule and another) facilitating access to the airport before the planned trip or after landing in Poznan?

Yes No

29. Which of the following factors determines the kind of your travel? Choose only one,(Do you prefer to do it In the shortest possible time? OR Rather have the lowest travel costs?

Time Costs Another

30. Have you ever used a car rental company (rent a car) located in the Ławica Airport?

Yes No

31. Other problems/comments you see regarding access to the airport by various means of transport?

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Thank you!