

Report on the Flight Accessibility of Joensuu



REGIONAL COUNCIL OF
North Karelia



Baltic Sea Region
Programme 2007–2013



European Union
European Regional Development Fund

1. INTRODUCTION AND SUMMARY

High-quality, function air traffic plays a crucial role in regional competitiveness. It is for this reason that the Regional Council of North Karelia is participating in the Baltic Bird project, which is being funded by the EU Baltic Sea Region Programme 2007-2013. The aim of the Baltic Bird project is to improve the flight accessibility of airports in peripheral regions. As part of the project, a survey was conducted in the spring of 2013 to determine how important Joensuu Airport is to companies and organisations as well as to individuals. Individual passengers include people taking trips for both business and leisure.

The Regional Council is concerned that a decline in the number of trips beginning from Joensuu Airport may lead to a reduction in the service offering and flight schedules, which would make travel more difficult. Conversely, an ample selection of flights and good schedule structure would generate demand. Another reason for shrinking passenger numbers might be the use of other airports. This is why it is important to investigate the reasons for declining passenger numbers as opportunities for preserving and developing passenger traffic from Joensuu Airport. The survey content was jointly produced by the Regional Council of North Karelia, Finavia, the North Karelia Chamber of Commerce and Joensuu Entrepreneurs Association.

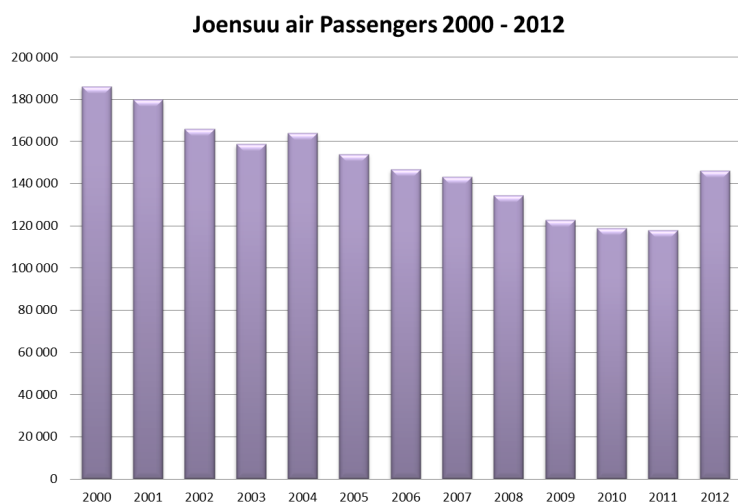
The report was done through three separate surveys. The target group in the first survey included companies and organisations operating in North Karelia. The survey was distributed to companies through the North Karelia Chamber of Commerce and Joensuun Yrittäjät. The survey was sent out to public administration organisations through contacts in the Regional Council of North Karelia. The second survey was aimed at individual passengers in Finnish and the third survey at individual passengers in English. This joint report compares the results obtained from the three target groups. The survey was conducted online using Webropol online survey and analysis software, and it was announced in newspapers and on the radio (Radio Rex). The survey was taken by 174 companies and organisations, 477 Finnish-speaking passengers and 32 English-speaking passengers.

The survey revealed how important Joensuu Airport is to both business and leisure travellers. Functional airport connections (e.g. buses) were also considered important. This was particularly emphasised in responses from English-speaking passengers. Airport connections were desired for all flights. A lack of airport connections on weekends was considered problematic. Passengers also wanted more information on airport connections and ordering them. Survey respondents also felt that there should be shops selling local goods at the airport.

Air traffic is vital to the region, particularly its export businesses, as it takes 4-5 hours to travel by rail from Joensuu to Helsinki. Joensuu Airport should remain part of the Finavia airport network.

2. BACKGROUND

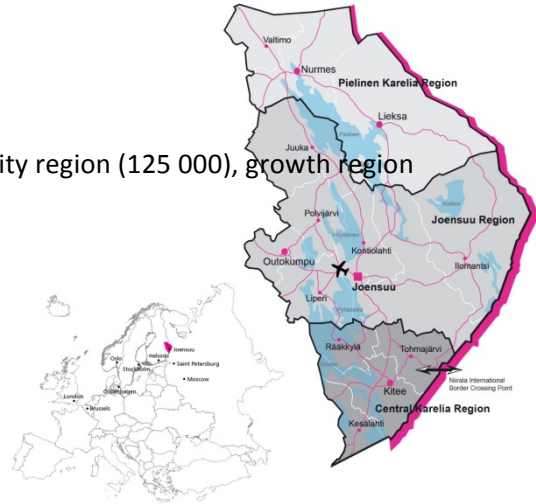
Joensuu had a peak passenger volume of over 180,000 persons in 2000. Since then, passenger numbers have seen a slight decline, with the exception of 2004, when there was a minor, temporary increase over previous years. There was greater growth in passenger numbers in 2012, when passenger volume increased by over 20,000 persons (to 146,000 persons) over the previous year.



In 2013, there was a dip in passenger numbers throughout Finland, with Joensuu following the national trend. At present, Finnair offers air service to and from Joensuu, with a portion of the flights outsourced to Flybe. There are five flights to Helsinki every weekday, with the overnight flight in particular significantly improving connections.

North Karelia in nutshell:

- 166 000 inhabitants (9,4 / km²)
- Age structure is challenging
- 13 municipalities
- Regional capital: City of Joensuu (75 000), economic city region (125 000), growth region
 - Distance to Petrozavodsk 368 km
 - Flight-time to Helsinki: 1 hour
- Size of the region 21 585 km² (lakes 3 803 km²)
- The easternmost region of the continental EU
- 300 km border with Russia
- North to south 240 km
- East to west 153 km
- Temperatures from +35C to -35C
- Airport – Joensuu city 10 km, 15 min



3. SURVEY RESULTS

3.1. HOW MANY FLIGHTS DO YOU TAKE EACH YEAR?

Question 1: Number of flights each year – companies and organisations

67% of the responding **companies/organisations** stated that they take over 20 flights each year. The more companies/organisations that reported taking trips, the higher the response percentage. This may be explained by the fact that companies and organisations taking the most trips consider Joensuu's flight accessibility to be important and, for that reason, took the survey in greater numbers than companies and organisations only taking a few flights each year.

Question 2: Number of flights each year – Finnish-speaking survey respondents

63% of **Finnish-speaking passengers** reported taking 1-5 flights a year. 20% said that they took 6-10 flights a year. 8% said that they took 11–20 flights and 5% over 20 flights each year. 4% said that they took no flights at all.

Question 3: Number of flights each year – English-speaking survey respondents

41% of **English-speaking passengers** reported taking 1-5 flights a year. 28% said that they took 6-10 flights a year. 19% said that they took 11–20 flights and 12% over 20 flights each year. No respondents said they took no flights at all.

In summary, it can be stated that companies and organisations responding to the survey frequently use air services, with 81% taking at least one flight each month. The number of flights taken by other passengers is considerably smaller – a majority of these report taking 1-5 flights each year. English-speaking survey respondents differ from Finnish-speaking respondents in that each respondent reported taking at least one flight each year, whilst 4% of the Finnish-speaking respondents stated that they take no flights at all each year. All in all, English-speaking respondents reported taking more flights than Finnish-speaking respondents.

3.2. OVERALL TREND IN TRAVEL

Question 4: Trend in number of trips – companies and organisations

44% of the companies/organisations surveyed estimated that their overall travel frequency had increased over the past three years. 41% estimated that their travel frequency had remained the same. 15% estimated that their travel frequency had decreased.

Question 5: Number of trips over the next three years – companies and organisations

49% of the companies/organisation surveyed estimated that their overall travel frequency would remain at current levels over the next three years. 40% estimated that their travel frequency would increase and 12% that it would decrease.

3.3. JOENSUU AIRPORT RECOGNITION

Question 6: Recognition of Joensuu Airport and its services – companies and organisations

Over 91% of the companies/organisations surveyed reported that they were either familiar or very familiar with Joensuu Airport and its services. 10% reported that they were somewhat or not very familiar with the airport and its services.

Question 7: Recognition of Joensuu Airport and its services – Finnish-speaking respondents

73% of Finnish-speaking respondents reported that they were either familiar or very familiar Joensuu Airport and its services. 21% reported that they were somewhat familiar with the airport and its services. 6% reported that they were not very or not at all familiar with the services.

Question 8: Recognition of Joensuu Airport and its services – English-speaking respondents

Half of English-speaking respondents reported that they were either familiar or very familiar Joensuu Airport and its services. 22% reported that they were somewhat familiar with the airport and its services. 25% reported that they were somewhat familiar with the services. 3% were not at all familiar with the services.

Summary:

- 93% of the companies/organisations surveyed know which destinations are served by Joensuu Airport and which airlines fly to them.
- 77% of Finnish-speaking respondents and 50% of English-speaking respondents reported that they knew which destinations were served by Joensuu Airport and which airlines fly to them.
- 74% of the companies/organisations, 60% of the Finnish-speaking respondents and 78% of the English-speaking respondents surveyed were familiar with the Finavia website (www.finavia.fi) as an information channel.

3.4. TRAVEL TO THE GREATER HELSINKI REGION

Question 9: Flights to the Greater Helsinki region – companies and organisations

48% of the companies and organisations surveyed had travelled to the Greater Helsinki region more than once a month in the past year. 32% had travelled once a month or less frequently and 19% a few times a year. 1% of the respondents had not flown at all.

Question 10: Flights to the Greater Helsinki region – Finnish-speaking respondents

55% of Finnish-speaking respondents reported that they had travelled to the Greater Helsinki region a few times in the past year. 27% reported that they had travelled to the Greater Helsinki region once a month or

less frequently. 5% reported that they had travelled to the Greater Helsinki region once a week or less frequently. 0.2% of the respondents reported that they had travelled to the Greater Helsinki region several times a week. 13% reported that they had not travelled to the Greater Helsinki region at all.

Question 11: Flights to the Greater Helsinki region – English-speaking respondents

66% of **English-speaking respondents** reported that they had travelled to the Greater Helsinki region a few times in the past year. 25% reported that they had travelled to the Greater Helsinki region once a month or less frequently. 3% reported that they had travelled to the Greater Helsinki region once a week or less frequently. 0% of the respondents reported that they had travelled to the Greater Helsinki region several times a week. 6% reported that they had not travelled to the Greater Helsinki region at all.

3.5. FLIGHTS FROM JOENSUU AIRPORT

Question 12: Flights out of Joensuu Airport during the past year – companies and organisations

40% of **the companies and organisation surveyed** reported that they had flown out of Joensuu Airport more than once a month during the past year. Nearly 33% had flown once a month or less frequently, approx. 25% a few times a year and 3.5% not at all.

Question 13: Flights out of Joensuu Airport during the past year – Finnish-speaking respondents

Over 58% of **Finnish-speaking respondents** reported that they had flown out of Joensuu Airport a few times during the past year. Just under 19% had flown once a month or less frequently. On the other hand, just under 19% had not flown out of Joensuu at all. Over 3.5% reported that they had flown once a week or less frequently and approx. 0.6% reported that they had flown several times a week.

Question 14: Flights out of Joensuu Airport during the past year – English-speaking respondents

Over half of **English-speaking respondents** reported that they had flown out of Joensuu Airport a few times during the past year. Just under 22% had flown once a month or less frequently. Just under 19% had not flown out of Joensuu at all. Over 9% reported that they had flown once a week or less frequently and 0% reported that they had flown several times a week.

Question 15: Primary destination – companies and organisations

Approx. 36% of **the companies and organisations surveyed** reported that they had taken the same number of domestic and international flights out of Joensuu Airport. Over 50% of the companies/organisations surveyed reported that they had primarily or exclusively taken domestic flights. Over 10% of the respondents reported that they had primarily or exclusively taken international flights. Over 2% reported that they had not taken any flights out of Joensuu Airport.

Question 16: Primary destination – Finnish-speaking respondents

Over 40% of **Finnish-speaking respondents** reported that they had taken both domestic and international flights out of Joensuu Airport. Just under 23% reported that they had primarily or exclusively taken domestic flights and approximately 26% reported that they had primarily or exclusively taken international flights.

Question 17: Primary destination – English-speaking respondents

Over 53% of **English-speaking respondents** reported that they had primarily or exclusively taken international flights out of Joensuu Airport. Just under 16% reported that they had taken both domestic and international flights. 12.5% reported that they had primarily or exclusively taken domestic flights. Nearly 19% reported that they had not taken any flights out of Joensuu Airport.

3.6. SCHEDULED AND CHARTER FLIGHTS

Question 18: Number of scheduled flights during the past year – companies and organisations

50% of the companies and organisations surveyed reported that they had taken a scheduled flight to Europe or elsewhere in the world a few times over the past year. Approximately 10% reported that they had taken a scheduled flight outside Finland more often than once a month and approximately 16% once a month or less frequently. Approximately 24% had not taken any flights at all.

Question 19: Number of scheduled flights during the past year – Finnish-speaking respondents

Over 63% of Finnish-speaking respondents reported that they had taken a scheduled flight to Europe or elsewhere in the world a few times over the past year. Over 28% reported that they had not taken any scheduled flights elsewhere in the world. Just under 8% reported that they had flown once a month or less frequently, approximately 0.4% once a week or less frequently and approximately 0.2% several times a week.

Question 20: Number of scheduled flights during the past year – English-speaking respondents

Over 59% of English-speaking respondents reported that they had taken a scheduled flight to Europe or elsewhere in the world a few times over the past year. Over 31% reported that they had flown once a month or less frequently, over 6% once a week or less frequently and 0% several times a week. Over 3% reported that they had not taken any scheduled flights elsewhere in the world.

Question 21: Point of departure for scheduled flights – companies and organisations

Approximately 78% of the companies and organisations surveyed reported that they had taken a scheduled flight out of Joensuu Airport. 20% reported that they had taken a scheduled flight out of Helsinki Airport. 2% reported that they had taken a scheduled flight out of Kuopio Airport.

Question 22: Reasons for taking a scheduled flight from an airport other than Joensuu Airport

In nearly half of all cases, the reason respondents depart from an airport other than Joensuu is that Joensuu has a poor range of connections to the desired destination. Just under 30% of the respondents reported that the reason was cheaper airfares elsewhere. Over 20% reported that their choice was due to another reason.

Question 23: Point of departure for scheduled flights – Finnish-speaking respondents

Nearly 52% of Finnish-speaking respondents reported that their scheduled flight departed from Joensuu. Over 43% reported that their scheduled flight departed from Helsinki Airport. Over 2% reported that their scheduled flight departed from Kuopio. Likewise, over 2% reported that their scheduled flight departed from another airport.

Question 24: Number of charter flights during the past year – Finnish-speaking respondents

46% of Finnish-speaking respondents reported that they had taken a charter flight during the past year.

Question 25: Point of departure for charter flights – Finnish-speaking respondents

Over 63% of Finnish-speaking respondents reported that their charter flights had departed from Helsinki Airport. Nearly 30% reported that their charter flights departed from Joensuu. Over 4% reported that their charter flights departed from Kuopio, 0% from Lappeenranta. Approximately 3% reported that their charter flights departed from another airport.

Question 26: Reasons for taking a charter flight from an airport other than Joensuu Airport – Finnish-speaking respondents

In over half of all cases, the reason respondents depart from an airport other than Joensuu is that Joensuu has a poor range of connections to the desired destination. Over 27% reported that the reason was due to cheaper airfares and just under 22% due to another reason.

Question 27: Points of departure for scheduled flights - English-speaking respondents

Over 45% of **English-speaking respondents** reported that their scheduled flights departed from Joensuu Airport. Over 48% reported that their scheduled flight departed from Helsinki Airport. 0% reported that their scheduled flight departed from Kuopio. Nearly 6.5% reported that their scheduled flight departed from another airport.

Question 27: Point of departure for charter flights - English-speaking respondents

6.25% of English-speaking respondents reported that they had taken a charter flight during the past year. Nearly 67% of **English-speaking respondents** reported that their charter flights had departed from Helsinki Airport. Just under 17% reported that their charter flights departed from Joensuu. 0% reported that their charter flights departed from Kuopio and Lappeenranta. Just under 17% reported that their charter flights departed from another airport.

Question 28: Reasons for taking a charter flight from an airport other than Joensuu Airport – English-speaking respondents

In nearly 52% of the cases, the reason respondents departed from an airport other Joensuu was that they found cheaper airfares elsewhere. Just under 30% reported that the reason was a poor range of connections to the desired destination and over 18% some other reason.

Question 29: Ratio between domestic and international flights – companies and organisations

Just under 27% of **companies and organisations** departing from other airports reported that they took both domestic and international flights. Over 40% reported that they had primarily or exclusively taken international flights and over 30% reported that they had primarily or exclusively taken domestic flights.

Question 30: Ratio between domestic and international flights – Finnish-speaking respondents

Over 68% of **Finnish-speaking respondents** departing from other airports reported that they had primarily or exclusively taken international flights. Just under 11% reported that they had primarily or exclusively taken domestic flights. Over 21% reported that they had taken both domestic and international flights.

Question 31: Ratio between domestic and international flights – English-speaking respondents

Over 83% of **English-speaking** respondents departing from other airports reported that they had primarily or exclusively taken international flights. Just under 17% reported that they had taken both domestic and international flights. None of the respondents reported that they had primarily or exclusively taken domestic flights.

Question 32: Frequency of flying with the same airline on connecting flights - companies and organisations

Over 55% **of the companies and organisations surveyed** reported that they usually flew with the same airline on their connecting flight. Approximately 30% reported that they sometimes flew with the same airline and approximately 10% rarely or never. Over 4% reported that they always flew with the same airline on connecting flights.

Question 33: Frequency of flying with the same airline on connecting flights – Finnish-speaking respondents

40% of Finnish-speaking respondents reported that they sometimes flew with the same airline on connecting flights. Nearly 40% reported that they usually flew with the same airline on their connecting

flights. Over 14% of the respondents reported that they rarely flew with the same airline. Over 3% reported that they always flew with the same airline on connecting flights and just under 3% reported that they never did.

Question 34: Frequency of flying with the same airline on connecting flights – English-speaking respondents

Over 43% of **English-speaking respondents** reported that they usually flew with the same airline on connecting flights. Nearly 35% reported that they usually flew with the same airline on their connecting flights. Just under 22% of the respondents reported that they rarely flew with the same airline. 0% reported that they always or never flew with the same airline on connecting flights.

3.7. AIRPORT CONNECTIONS

Question 35: Modes of transport used in coming to the airport - companies and organisations

Nearly 60% of **the companies and organisations surveyed** reported that they came to the airport in their own vehicle and parked at the airport. 30% came by taxi. Approximately 6.5% came by bus and just under 5% were dropped off at the airport in their own vehicle.

Question 36: Modes of transport used in coming to the airport – Finnish-speaking respondents

Nearly 46% of **Finnish-speaking respondents** reported that they had been dropped off at Joensuu Airport in their own vehicle. 31% reported that they came to the airport in their own vehicle and parked at the airport. Just under 14% reported that they came to the airport by taxi and over 9% by bus.

Question 37: Modes of transport used in coming to the airport – English-speaking respondents

Nearly 45% of **English-speaking respondents** reported that they had been dropped off at Joensuu Airport in their own vehicle. Over 32% reported that they came to the airport by taxi and over 19% by bus. Just over 3% reported that they came to the airport in their own vehicle and parked at the airport.

Question 38: Importance of functional airport connections – companies and organisations

Nearly 40% of **the companies and organisations surveyed** felt that functional airport connections were less important, approx. 35% that they were important and approx. 25% that they were very important.

Question 39: Importance of functional airport connections – Finnish-speaking respondents

79% of **Finnish-speaking respondents** felt that functional airport connections were either important or very important. 21% felt that functional airport connections were less important.

Question 40: Importance of functional airport connections – English-speaking respondents

94% of **English-speaking respondents** felt that functional airport connections were either important or very important. Over 6% felt that functional airport connections were less important.

Question 41: Primary mode of transport used for flights departing from airports other than Joensuu – companies and organisations

Of the **companies and organisations** departing from an airport other than Joensuu, 54% drove from Joensuu (or elsewhere in North Karelia) in their own vehicles and parked at the airport. Over 30% of the respondents came by train, over 7% by taxi and just under 6% were dropped off in their own vehicle. Just under 1.5% came by bus.

Question 42: Primary mode of transport used for flights departing from airports other than Joensuu – Finnish-speaking respondents

Of the **Finnish-speaking respondents** departing from an airport other than Joensuu, over 58% drove from Joensuu (or elsewhere in North Karelia) in their own vehicles and parked at the airport. Approx. 30% came

by train and over 10% were dropped off in their own vehicles. Over 1% came by bus and just under 0.5% by taxi.

Question 43: Primary mode of transport used for flights departing from airports other than Joensuu – English-speaking respondents

Of the **English-speaking respondents** departing from an airport other than Joensuu, over 70% travelled from Joensuu (or elsewhere in North Karelia) by train. Over 18% were dropped off in their own vehicles. Over 7% drove to the airport in their own vehicle and parked at the airport. Just under 4% came by bus and none by taxi.

3.8. AIRFARES

Question 44: Maximum airfare for one-way flight to the Greater Helsinki region – companies and organisations

Approx. 46% of the **companies and organisations surveyed** would be prepared to pay no more than 200 € for a one-way flight between Joensuu and Helsinki. Approx. 20% of the respondents would be prepared to pay no more than 100 €. Just under 24% would be prepared to pay 300 € and over 8 % 400 €. Just under 2% reported that they would be prepared to pay no more than 50 €.

Question 45: Maximum airfare for one-way flight to the Greater Helsinki region – Finnish-speaking respondents

Nearly 53% of **Finnish-speaking respondents** reported that they would be prepared to pay 100 € for a one-way flight between Joensuu and Helsinki. 26% of the respondents would be prepared to pay 200 €. Just under 16% would be prepared to pay no more than 50 € and approx. 5% 300 €. Approx. 0.4% reported that they would be prepared to pay 400 €.

Question 46: Maximum airfare for one-way flight to the Greater Helsinki region – English-speaking respondents

Just under 41% of **English-speaking respondents** reported that they would be prepared to pay 100 € for a one-way flight between Joensuu and Helsinki. Approx. 28% of the respondents would be prepared to pay no more than 50 €. 25% would be prepared to pay 200 € and over 6% 300 €. No respondents would be prepared to pay 400 €.

3.9. FLIGHT CONNECTIONS AND OFFERING

Question 47: Importance of an overnight flight – companies and organisations

45.61% of the **companies and organisations surveyed** were satisfied with the flight offering and schedules at Joensuu Airport.

Of the **companies and organisations surveyed**, nearly 53% felt that overnight flights were either important or very important to Joensuu flight connections. Approx. 19% did not have a strong opinion on the matter. Approx. 28% felt that an overnight flight was not very or not at all important.

Question 48: Importance of an overnight flight – Finnish-speaking respondents

54.49% of **Finnish-speaking respondents** were satisfied with the flight offering and schedules at Joensuu Airport.

Nearly 52% of **Finnish-speaking respondents** felt that an overnight flight would be important or very important to Joensuu flight connections. Over 31% did not have a strong opinion on the matter. Over 17% felt that an overnight flight was not very or not at all important.

Question 49: Importance of an overnight flight – English-speaking respondents

25.81% of **English-speaking respondents** were satisfied with the flight offering and schedules at Joensuu Airport.

Nearly 72% of **English-speaking respondents** felt that an overnight flight would be important or very important to Joensuu flight connections. Just under 22% did not have a strong opinion on the matter. Over 6% felt that an overnight flight was not very or not at all important.

Question 50: Importance of bringing other airlines to Joensuu - companies and organisations

Over 77% of **the companies and organisations surveyed** felt that bringing other airlines to Joensuu would be important or very important. Approx. 18% did not have a strong opinion on the matter. Just under 5% felt that it was not very or not at all important.

Question 51: Importance of bringing other airlines to Joensuu – Finnish-speaking respondents

Over 76% of **Finnish-speaking respondents** felt that bringing other airlines to Joensuu would be important or very important. Over 19% did not have a strong opinion on the matter. Just under 4.5% felt that it was not very or not at all important.

Question 52: Importance of bringing other airlines to Joensuu – English-speaking respondents

Over 78% of **English-speaking respondents** felt that bringing other airlines to Joensuu would be important or very important. Over 15% did not have a strong opinion on the matter. Just under 6% felt that it was not very or not at all important.

4. JOENSUU AIRPORT SERVICES**Companies and organisations**

The companies and organisations surveyed were satisfied with the flight offering and schedules at Joensuu Airport.

- Business hours: 98.26%
- Sales selection: 85.63%
- Service: 95.71%
- Over 67% of the respondents were satisfied with the parking services at Joensuu Airport.
- Just over 24% of the respondents use air freight services.
- Nearly 93% of the respondents felt that Joensuu's air freight services were sufficient for their own company/organisation.

Of the companies and organisations surveyed, nearly 90% felt that Joensuu air traffic was important or very important to them. Just under 10% did not have a strong opinion on the matter. Approx. 1% felt that it was not very important.

Finnish-speaking respondents

The respondents were satisfied with Joensuu Airport:

- Business hours: 94.43%
- Sales selection: 78.90%
- Service: 94.16%
- 73.26% of the respondents were satisfied with the parking services at Joensuu Airport.

English-speaking respondents

The respondents were satisfied with Joensuu Airport:

- Business hours: 89.29%
- Sales selection: 82.14%
- Service: 92.86%
- 89.29% of the respondents were satisfied with the parking services at Joensuu Airport.