Passenger Perception towards Low Cost Carriers; Case of Pristina, Skopje and Tirana Airport

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Abstract: An increase on frequency of Low Cost Carriers operating in an airport, indicates that price factor affects the number of passengers served, competition and passenger migration from one airport to another. For any given airport there will be passengers who differ in terms of their personal preferences, trip characteristics and service valuations. The aim of this paper is, to measure the passenger's perception about low cost carriers, by providing empirical evidence regarding the influence of price factor in demand for air travel, with objective to analyze the passengers profile and relationship of their socio demographic factors with their flying preferences. The analysis of two group proportion tests and linear regression are the main methods applied. The findings show that passengers make up a heterogeneous consumer group whose flying is influenced more by airfare and personal circumstances. By applying a linear regression analysis, we have measured how the relationship between the independent variable "price" is related to changes in the dependent variable "demand" and we have approximated changes on passenger demand for the selected airports. The findings provide new insights for airport and airline operators, policy makers and civil aviation authorities.

Keywords: passenger; perception; low-cost

1. Introduction

Forecasting the impact of variables on airport business activity is of particular importance for marketing of the air transport industry, especially when you take into account the high level of costs involved for airport stakeholders. The airport business activity today is considered as one of the fastest growing industries globally. Governments of many countries have built and developed airports not only to improve their country's infrastructure but also to encourage local and regional development of the surrounding locality by creating and providing new opportunities for economic growth of the surrounding areas (Jarach, 2005). Airport privatization, in combination with airline market liberalization, offers new opportunities for passengers and airports to develop creative strategies and gain competitive advantage in the market. According to (Başar & Bhat, 2004) the deregulation of air transport and the growth of low-cost carriers (LCCs) such as Southwest and Ryanair,

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has resulted in intensified competition and much lower prices, especially on city pairs where network carriers compete with LCCs.

Similarly in western Balkans, the market liberalization and airport privatization enabled the competition among airports, as a result of which, new prospects for airports, airlines and passengers were introduced. Similarly, all three airports selected in our study were recently privatized, their infrastructure was modernized, new terminal buildings were constructed and their overall amenities were improved. The Airports that we have chosen in our study all together serve a market of six point seven (6.7) million people (E.U. Commission, 2016), covering mainly short-distance flights, no longer than four (4) hours in flying distance. The airlines operating at the airports are those of mid-sized airlines, combined Low Cost Carriers (LCCs) and Full Service Carrier (FSC) and only during 2016 all three airports together served five point eight (5.8) million passengers in total, (Facts and Figures about Tirana International Airport Nënë Tereza - Tirana International Airport, 2017), (TAV Skopje Airport, Macedonia, 2017), (Statistics – CAA, 2017). The market share for all three airports; 39% is covered by Tirana International Airport, 31% by Pristina International Airport and 30% by Skopje International Airport:
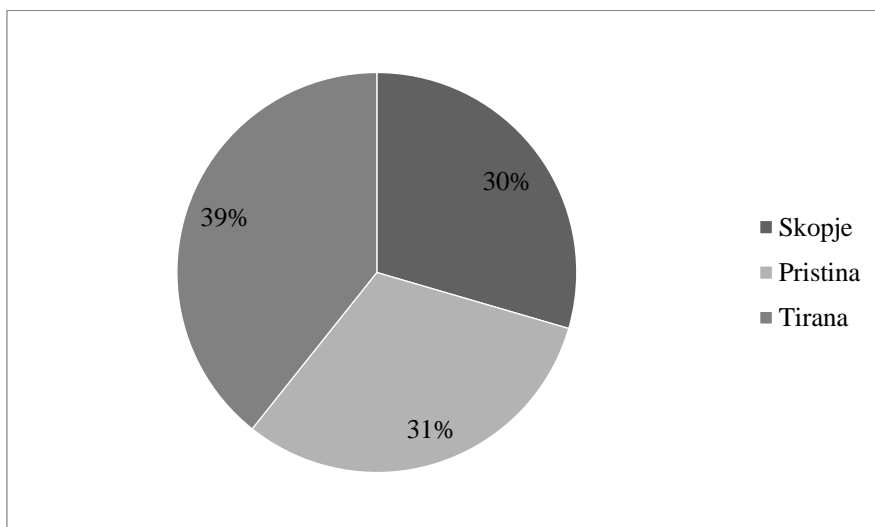

Figure 1. Pristina, Skopje and Tirana International Airport market share

Unlike Pristina and Tirana, at Skopje Airport, Low Cost Carrier Wizz Air has permanently based three aircraft and just recently they have announced the decision to base their fourth aircraft through which they are going to introduce new flights to Malta, Rome, and Vzxjo. This way WizzAir became the busiest airline operating out of Macedonian market with a passenger share of just over 54% (Macedonia, 2017). The increase in number of passengers and frequency of flights in Skopje Airport is evident. Hence, the competition among the regional airports has been intensified too,

especially among Skopje Airport and Pristina Airport. When we compare the number of passengers served during 2015/2016 among the three selected airports in the study, percentage vise Skopje Airport marks the biggest increase by 13.6% in comparison with year 2015.
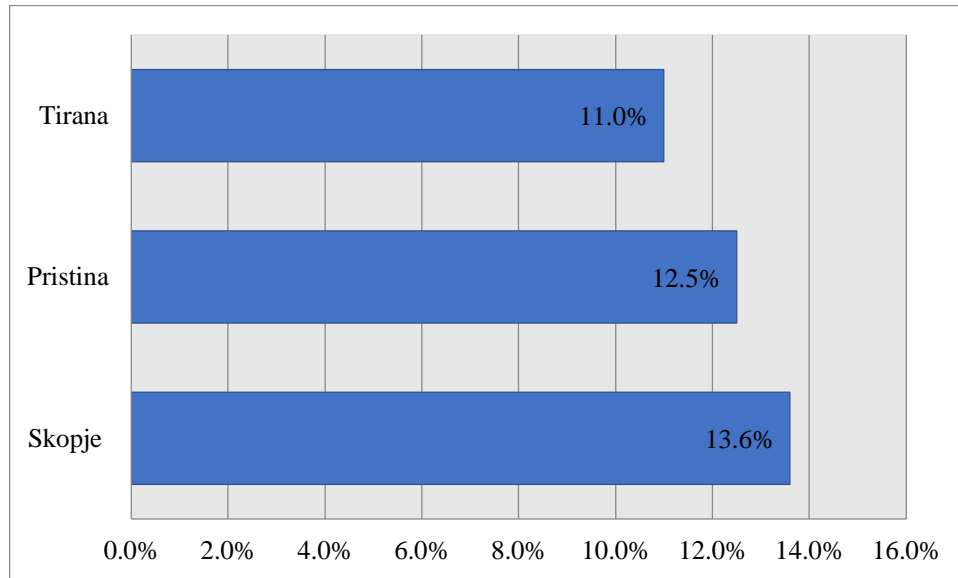

Figure 2. Comparison of passengers served by Pristina, Skopje and Tirana Airport, 2015/2016

Although this increase in the number of passengers served can be attributed to airport privatization and infrastructure modernization, the fact that passenger migration from one airport to another airport is significant, indicates that Low Cost Carriers and price factor affect the number of passengers served and competition between airports.

The aim of this research is to measure the passenger's perception about low cost carriers by providing empirical evidence regarding the influence of price factor in demand for air travel.

The research objective is to analyze the passengers profile and relationship of their socio demographic factors with their flying preferences.

This study, as a pioneer research for the selected airports and it will contribute to the airport industry by providing airport stakeholders (airport operators, airlines, aviation authorities and governments) with an analysis about passengers' profile, their type of airline preference and information about the impact of price variable in demand for air travel. The results will be of great importance and interest for the airport stakeholders in their daily decision-making processes and their business development activity in general.

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2. Literature Review

The Low-Cost Carriers have just recently started to operate in the western Balkans and to draw a certain number of passengers from Full Service Carriers (FSC). However, in our case, they don't draw passengers from FSC only, but they also draw passengers from one airport to another. For this reason, it is foreseeable that soon the competition among the selected airports it is expected to become more intensive.

Identifying passengers' expectations and their socio-demographic characteristics is essential for airport as well as for airline operators for them to be prepared and provide the desired services. The later, need to understand the passenger's expectations, their needs, and their socio demographic characteristics to be competitive and successful in their daily business activity. Many studies were conducted from a number of researchers investigating the price sensitivity and factors that drive the air travelers when choosing their airport and airline of preference (Lin & Huang, 2015; O'Connell & Williams, 2005; Kuljanin & Kalic, 2015; Martinez-García, 2012; Fourie & Lubbe, 2006). Most of them have concluded that passenger profile using FSCs and LCCs substantially differ in terms of their socio-demographics and they have also found that the 21st century business passengers consider LCCs as an option for their business travel needs. Furthermore, authors like (Barbot, 2009; Harvey, 1987; Marcucci & Gatta, 2011; Loo, 2008) they all aim to identify those factors impacting the decision-making process from the passenger's perspective. The author (Barbot, 2009) argues that, when passengers must choose between two airports they consider not just one airport but the group of airports available in the region and the airlines operating at those airports. On another study conducted by authors (Blackstone, Buck & Hakim, 2006) on factors influencing the airport selection in a region with multiple airports within United States of America, they found that price was one of the most important factors among other factors. Author (Graham, 2006) discusses the potential impact of the rise of low cost carriers by arguing that it is certainly true that in the last few years, the environment within which the airline industries operate has become much more less certain and stable, however, in the long term the author foresees that it is likely that traditional key drivers of demand such as cost, income, and time will continue to play an important role in influencing air travel demand, although the exact relationship they have with travel growth and their relative importance, may change. According to (Graham, 2006) in less developed economies, it is likely that economic growth will still play a significant role in stimulating growth of new travelers, whereas in more developed countries, travel cost is likely to have a far greater impact in encouraging additional trips. Many studies have shown that passengers will select the cheapest and nearest airport for them and them all implied that there is a heterogeneity among low cost airlines and fixed cost airlines. However, author (Kim, 2015) argues that all those studies were mostly based on well-developed

economies and marketplaces in which LCCs are well-developed and have reach maturity in their product life cycle.

To our knowledge, there is little evidence about the profile of Balkan traveler and their preference towards FSCs or LCCs. Most of LCCs in the Balkans market are still in the growing stage of their product life cycle and therefore the major feature they offer, the ticket price it is considered as a paramount, regardless of other services they offer. Therefore, there is a need to evaluate the passenger perception toward the LCCs and FCCs especially when because price is the key factor to passengers, regardless of other needs for the ancillary services.

3. Research Methodology

The research methodology applied in this study is of quantitative nature, where Pristina, Skopje and Tirana International Airport were selected as a case study. The data obtained derive from the survey conducted with departing passengers at the airport departure halls, using a pretested and structured questionnaire as a research instrument. The survey was conducted with the valuable help of fifteen enumerators. The passenger participation in the survey was completely on voluntarily bases and took place during month May, June 2017. The sample size consists of sixteen hundred (600) randomly selected departing passengers and it was defined using the random stratified method, depending on the total number of passengers that were served from all three airports during year 2016. The two-group proportion tests and linear regression analysis were applied using the SPSS program, version 20.0 for windows.

4. Data Analysis Interpretation

From the passenger trip frequency, we have grouped the passengers in four different groups; group one (the ones that travel once a year); group two (the ones that travel twice till three times a year), group three (four until five times a year) and group four (more than six times a year).

Table 1. Travel Frequency

group-frequency

		Frequency	Percent	Valid Percent	Cumulative Percent
	1	180	30%	30%	30%
	2-3	277	46.2%	46.2%	76.2%
Valid	4-5	114	19%	19%	95.2%
	6<	29	4.8%	4.8%	100%
	Total	600	100%	100%	

Table one shows that 46.2% of respondents fly two to three times a year, 30% only once a year and only 19% four two five times a year. In this way we have defined that in average, passengers from Pristina, Skopje and Tirana Airport fly at least twice a year.

Furthermore, to investigate whether the distribution of the socio-demographics of respondents across the airports is consistent or not, the two-group proportion test was applied to detect the relationship between two categorical groups. The null hypothesis of the test is that there is no relationship between the variables in the total population.

Table 2. Relationship of the socio-demographics and airport group

Description of socio-demographics for selected airports.

		Pristina freq.	%	Skopje freq.	%	Tirana freq.	%	p-value[1]
passenger citizenship	Macedonian	29	15.6%	100	55.6%	24	10.3%	
	Albanian	18	9.7%	18	10.0%	131	56.0%	.000**
	Kosovar	101	54.3%	46	25.6%	13	5.6%	
	Other	38	20.4%	16	8.9%	66	28.2%	
purpose of flight	VFR	156	83.9%	127	70.6%	138	59.0%	
	Business	22	11.8%	37	20.6%	36	15.4%	.000**
	Tourism	8	4.3%	16	8.9%	60	25.6%	
gender	female	67	36.0%	50	27.8%	58	24.8%	.037*
	male	119	64.0%	130	72.2%	176	75.2%	
education	High School	28	15.1%	9	5.0%	22	9.4%	
	University	145	78.0%	161	89.4%	190	81.2%	.011*
	Post graduate	13	7.0%	10	5.6%	22	9.4%	
employment status	employed	126	67.7%	163	90.6%	207	88.5%	
	unemployed	60	32.3%	17	9.4%	27	11.5%	.000**
Age	<18	14	7.5%	9	5.0%	9	3.8%	
	19-30	55	29.6%	66	36.7%	79	33.8%	
	31-40	43	23.1%	52	28.9%	66	28.2%	.039*
	41-50	60	32.3%	38	21.1%	49	20.9%	
	50<	14	7.5%	15	8.3%	31	13.2%	

1 The p-value gives the probability that the proportion in each category of the two groups is even. *: $p < 0.1$; **: $p < 0.05$; ***: $p < 0.01$.

The results show that the p value for all groups is lower than .05 therefore we reject the null hypothesis and conclude that there is a significant relationship between the variables in the total population. Approximately 54.3% of respondents in Pristina Airport were Kosovar citizens, 55.6% of respondents in Skopje were Macedonian citizens and 56% in Tirana were Albanian citizens. These results indicate that most

of passengers consist of nationals of the countries where the airport is actually located. The relationship between travel purpose and airport chosen is significant, 83.9% of Pristina passengers travel to visit friends and relatives, similarly in Skopje 70.6% whereas we have a slightly smaller percentage in Tirana 59%. For a change, in Tirana 25.6% of travelers flying purpose is tourism, which is a much more significant value in comparison with 4.3% in Pristina and 8.9% in Skopje. As a conclusion the main reason of passengers flying from all three Airports is visiting friends and relatives where Tirana differs with a significant increase in percentage of passengers whose travel purpose is tourism. The relationship of age, education and gender is significant at the p-level lower than .05, where most of respondents interviewed were of gender male; 64% in Pristina, 72.2% in Skopje and 75.2% in Tirana. Regarding education, 78% of respondents in Pristina, 89.4% in Skopje and 81.2% in Tirana have a University degree. Most of respondents were of age between 20-50 years old, which indicates that passengers' age in general belongs to young and middle age group. Furthermore the relationship between employment status of respondents and airport they use is significant at p value .000, which indicates that the relationship is significant and most of the respondents are employed, 67.7% in Pristina, 90.6% in Skopje and 88.5% in Tirana.

Table 3. Relationship between passenger's (LCC&FSC) preference group and their sociodemographic characteristics

Description of socio-demographics (FSC 102, 17%; LCC 498, 83%)

		LC freq.	%	FC freq.	%	p-value[1]
Airport	Pristina	148	79.6%	38	20.4%	
	Skopje	140	77.8%	40	22.2%	.002
	Tirana	210	89.7%	24	10.3%	
Passenger citizenship	Macedonian	125	81.7%	28	18.3%	
	Albanian	144	86.2%	23	13.8%	.559
	Kosovar	129	80.6%	31	19.4%	
	Other	100	83.3%	20	16.7%	
Purpose of flight	VFR	351	83.4%	70	16.6%	
	Business	78	82.1%	17	17.9%	.933
	Tourism	69	82.1%	15	17.9%	
Gender	female	141	80.6%	34	19.4%	
	male	357	84.0%	68	16.0%	.310
Education	High School	50	84.7%	9	15.3%	
	University	409	82.5%	87	17.5%	.719
	Post graduate	39	86.7%	6	13.3%	
Employment status	employed	414	83.5%	82	16.5%	
	unemployed	84	80.8%	20	19.2%	.505
Age	<18	27	84.4%	5	15.6%	
	19-30	170	85.0%	30	15.0%	.643
	31-40	132	82.0%	29	18.0%	

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41-50	117	79.6%	30	20.4%
50<	52	86.7%	8	13.3%

1 The p-value gives the probability that the proportion in each category of the two groups is even. *: p < 0.1; **: p < 0.05; ***: p < 0.01.

Table 3 presents information about passenger's socio demographic characteristics and their relationship between passengers who prefer flying with low cost carriers and full-service carriers. The results show that the p value is lower than .05 for airport group while for all other groups is greater than .05. Therefore, while we reject the null hypothesis for airport group and conclude that there is a significant relationship among airport group and passenger's airline preference, we also accept the null hypothesis for all other groups concluding that there is no relationship between passenger's airline preference group and other demographic variables from the total population.

The results show that relationship between passenger's airline preference and airport group is significant where 79.6% of respondents at Pristina Airport prefer flying with Low Cost Carriers instead of Fixed Cost Carriers, at Skopje Airport 77.8% of respondents prefer Low Costs Carriers and in Tirana 89.7% of respondents prefer flying with Low Cost Carriers in comparison with to Fixed Cost Carriers. This result confirms respondent's preference and popularity towards Low Cost Carriers at all three airports and indicates that price is the key attribute affecting the passenger's decision when choosing an airport to fly from.

Table 4. Relationship between the price group and airport group

price group * selected airports Crosstabulation

		Pristina		Skopje		Tirana		
		freq	%	freq	%	Freq	%	p-value1
Price	<50	22	11.8%	87	48.3%	18	7.7%	
group	51-100	45	24.2%	56	31.1%	54	23.1%	
	101-200	36	19.4%	25	13.9%	32	13.7%	
	201-400	65	34.9%	6	3.3%	82	35.0%	.000
	401-600	9	4.8%	3	1.7%	41	17.5%	
	601<	9	4.8%	3	1.7%	7	3.0%	

1 The p-value gives the probability that the proportion in each category of the two groups is even. *: p < 0.05; **: p < 0.01.

When we examined the relationship between the price group and airports, the p value came up to be lower than .05. Therefore, we reject the null hypothesis and conclude that the relationship among the price and airport group variable is significant. The results note that 48.3% of the respondents in Skopje Airport have paid for their ticked 50€ or less, whereas in Pristina 11% and in Tirana 7.7%. In the group of respondents who paid for their tickets in range from 201€ up to 400€, 34.9%

were from Pristina, 35% from Tirana and 3.3% from Skopje. These data confirm the fact that Skopje offers the cheapest travel fare in the market, which may be interconnected by the fact that the Low-Cost Carrier WizzAir covers greatest part of Macedonian market. Therefore, the question arises; how much does the ticket price affects the travel demand? And, to answer this question, by applying the linear regression econometric model, we have measured if how the price factor is statistically significant and how the relationship between the independent variable prices is related to changes in the dependent variable demand.

The equation of our econometric model is:

$$y = b_0 + b_1 x + \varepsilon$$

Where:

y is the dependent variable,

x is the independent variable,

b1 is the regression coefficient and

b0 is the constant (intercept).

ε the epsilon is the residual value or, simpler, error.

We can also rewrite this equation as follows:

$$\varepsilon = y - (b_0 + b_1 x)$$

or

$$\varepsilon = y - \hat{y}$$

After the execution of the regression analysis we get the following result.

Table 5. Model Summary

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate	Durbin-Watson
1	.899[a]	.809	.809	.43729822	1.770

a. Predictors: (Constant), price of the ticket purchased
b. Dependent Variable: REGR factor score 5 for analysis 1

The coefficient of determination (Adjusted R Square) value is .809 which shows that 80.9% of the demand variance is explained from the ticket price variable.

Table 6. Analysis of variance table

ANOVA[a]

Model		Sum of Squares	Df	Mean Square	F	Sig.
	Regression	476.557	1	476.557	2492.065	.000[b]
1	Residual	112.443	588	.191		
	Total	589.000	589			

a. Dependent Variable: REGR factor score 5 for analysis 1
b. Predictors: (Constant), price of the ticket purchased

From the ANOVA table we get the p value lower than .05 and therefore we conclude that b1 coefficient is significant distinctive from zero, therefore we can conclude that our regression analysis will offer us a good evaluation for the dependent variable.

Table 7. Regression coefficients

Coefficients[a]								
Model		Unstandardized Coefficients		Standardized Coefficients	t	Sig.	95.0% Confidence Interval for B	
		B	Std. Error	Beta			Lower Bound	Upper Bound
1	(Constant)	1.116	.029		38.876	.000	1.059	1.172
	price of the ticket purchased	-.005	.000	-.899	-49.921	.000	-.005	-.004
a. Dependent Variable: REGR factor score 5 for analysis 1								

Since the p-value in our model is lower than .05, both the intercept and the coefficient of the independent variable are statistically significant. The variable demand, has a negative coefficient of -.005, which is statistically significant. This shows that for every unit increase in the ticket price, the forecast is that the demand for travel will decrease for .005 units.

Travel demand = 1.116 - 0.005 *ticket price

Based on this equation we can approximately estimate changes on demand of passengers for the selected airports (Pristina, Skopje and Tirana) depending on ticket price. Example: if ticket price rises for 50€, the passenger demand for air travel will decrease from 1.1 in .86.

Travel demand = 1.116 - .005 *50

Demand =1.116-.25 = .865

With confidence interval of 95% for the regression coefficient the independent confidence interval is from -.005 until -.004, meaning that one-unit increase in price coefficient establishes a decrease in travel demand from -.005 until -.004, with confidence interval of 95%. Therefore, for the selected airports, with price increase the demand will decrease for -.005.

5. Discussion and Conclusions

This study investigates the passenger's demographics and perception about airline carriers and price at Pristina, Skopje and Tirana Airport. The results provide empirical evidence regarding the level of price influence on air travel demand. The analysis of descriptive statistics, two group proportion tests and linear regression analysis are the main methods applied for the data analysis.

In conclusion, this research has achieved its aim in contributing to the understanding of the under researched topic of Pristina, Skopje and Tirana Airport passengers profile, preference and price impact factor. The results show that, on average, the passengers from selected airports fly at least twice a year. The socio-demographics of respondents across the airport group mark a significant relationship between the variables in the total population. Most of passengers flying from the airports are of the nationality of the country where the airport is located and the main travel purpose for most of the respondents is to visit friends and relatives (83.9% in Pristina, 70.6% in Skopje and 59% in Tirana). For a difference, Tirana has a considerable greater percentage of passengers whose flying purpose is tourism 25.6%. This result proves the fact that all three airports serve mainly passengers from diaspora. The positive shift of passengers in Tirana whose travel purpose is tourism, derives mainly from the latest positive developments on infrastructure and unexplored Albanian coast, as a very recent west Balkan attraction.

Regarding other demographic variables most of respondents have a University degree which belong to young and middle age group of society, between 20 up to 50 years old. This result indicates that, passengers who are most likely to travel, are people from middle age, educated and employed group. Regarding passenger's preference for airline carrier, at all three airports results indicate a significant preference towards Low Cost Carriers; on the other hand, there is no relationship between passenger's preference for airline carrier and other demographic variables from the total population. These results confirm respondent's preference towards Low Cost Carriers and indicate that ticket price is the key affecting attribute in decision making process when choosing an airport, regardless of other amenities or services being offered.

As a conclusion passenger make up a heterogeneous consumer group whose need for flying is influenced more by airfare and personal circumstances. The results of proportional test among price and airport group shows that relationship is significant, where Skopje Airport differentiates with 48.3% of respondents who paid the cheapest ticket indicating that Skopje Airport offers the cheapest travel fare in the market. This can be interconnected with the fact that the low-cost airline WizzAir covers most of the destinations served by Skopje Airport and has three aircraft based on permanent bases at the airport.

When measuring the relationship between the independent variable price and its effect on dependent variable demand, results indicate that: for every unit increase in price we predict that demand will decrease for .005 times.

$$\text{Travel demand} = 1.116 - 0.005 * \text{ticket price}$$

Based on this equation we have approximately estimated changes on passenger demand for the selected airports. As a conclusion the higher the price ticket the lower

is the travel demand, or in another word with price increase the demand will decrease.

This research will contribute to the air transport industry of the region concerned and provides new insights to airport, airline operators and aviation stakeholders. Airport operators and airlines operators should design their marketing strategies and plans considering the passengers preference towards low cost carriers and their sensitivity towards the airfare. Further studies should provide a more effective linking of travel purpose and other factors affecting the demand for travel. The analysis of other factors could provide a more definitive answer regarding the weight and importance of other factors that could have important consequences for the airport industry in general. Future studies may also be focused on cluster analysis, to segment the group of passengers and identifying the tendencies of the frequent and infrequent flyers among the airports.

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