



Economic impact analysis

of Poznań Airport



Authors

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Summary

Poznan Airport is one of the largest regional airports in Poland. In the first quarter of 2025, it was recognised by ACI EUROPE as one of the five fastest growing airports in Europe in the category of up to 10 million passengers. The airport is located in a city and region with great development potential.

The activities of Poznan Airport go beyond its operational functions, generating significant income and employment in the city and region. The economic impact analysis for 2015, 2024 and forecasts for 2025, 2032 and 2035 cover direct, indirect and induced effects, measured by gross value added and employment, and in 2024 additionally takes into account the catalytic impact and fiscal effect.

The results of the analysis indicate a very dynamic increase in the importance of the airport for the region's economy. The total income effect (calculated as the sum of the direct, indirect and induced effects) increased from approximately PLN 160 million in 2015 to PLN 1,09 billion in 2025, and according to forecasts, it will amount to PLN 1,84-2,51 billion in 2032 and reach PLN 2,38-3,65 billion in 2035. This is accompanied by a strong increase in passenger traffic, which by 2035 may exceed 7 million passengers per year,

and an increase in employment – from 1,362 FTE (Full-Time Equivalent) in 2015 to over 4 383 FTE in 2025 and even 7 614 FTE in 2035. The airport's operations have a broader impact on the economy by stimulating tourist traffic (436 million in added value and supporting 3,355 jobs across the economy) and fiscal effects of PLN 23 million in state revenue.

The structure of the economic impact remains relatively stable, with a dominant share of the direct effect, but with the growing importance of indirect and induced effects, confirming the airport's strong links with its economic environment. At the same time, the analysis points to significant potential lost benefits if the airport's development is restricted for environmental or infrastructural reasons.

The results of the analysis should be interpreted taking into account the limitations of the input-output analysis method and price changes over time, and a full assessment of the role of the airport also requires consideration of long-term structural effects and external costs.



Key conclusions

- **Poznan Airport serves as strategic economic infrastructure**, the further development of which is crucial for the competitiveness of Poznań and Wielkopolska on a national and European scale.
- **The airport acts as a catalyst for economic development**, in particular by stimulating tourist traffic, increasing the transport accessibility of the region, and strengthening the investment attractiveness of Poznań and Wielkopolska.
- **The airport's economic impact structure is stable and predictable**, which increases its importance as a long-term pillar of regional development.
- **The total (direct, indirect and induced) economic impact of the airport is growing dynamically** – the income effect increased from approximately PLN 160 million in 2015 to PLN 856 million in 2024 and PLN 1,09 billion in 2025, and according to forecasts, it will reach PLN 2,37-3,65 billion in 2035.
- **The value of the direct impact is growing steadily and remains the largest component of the economic impact** – the direct added value increased from approx. **PLN 88 million in 2015 to PLN 396 million in 2024 and PLN 505 million in 2025** and is forecast to reach **PLN 1,12-1,72 billion in 2035**.
- **The indirect impact** is also growing, amounting to **PLN 60 million in 2015, PLN 275 million in 2024 and PLN 338 million in 2025**, and is expected to reach **PLN 715-1 098 million in 2035**.
- **The induced impact** is growing the fastest, from approximately **PLN 12 million in 2015 to PLN 185 million in 2024 and PLN 249 million in 2025** and is expected to reach **PLN 543-833 million in 2035**.
- **Poznan Airport contributes significantly to the region's GDP**, and the added value it generates is making **an increasingly important contribution to the economy of the city of Poznań and the region**.
- **The airport's operations generate significant employment in the economy** – the number of jobs increased from 1,362 FTE in 2015 to 3 759 in 2024 and 4 383 in 2025, and in 2035 it may reach approximately 7 614 FTE.
- **The catalytic effect** is economically significant – in 2024, the airport contributed to an increase in business activity through investment and tourist traffic, thereby generating approximately **PLN 1.31 billion** in added value and around **5,925 jobs** in the economy. In 2025, these figures were approximately **PLN 1.81 billion** and approximately **7,620 jobs**, respectively.
- **Poznan Airport generates measurable fiscal revenue** – in 2024, the airport's operations translated into approximately **PLN 23 million in public finance revenue** (CIT, PIT, contributions, local taxes).
- **The dynamic growth in passenger traffic strengthens the economic effects** – the number of passengers increased to **over 3.6 million in 2024**, **over 4 million in 2025**, and forecasts indicate the possibility of handling **over 7 million passengers per year by 2035**.
- **Development constraints on the airport (environmental or infrastructural) would mean significant lost economic benefits for the region**, both in terms of GDP, employment and fiscal revenues.





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Introduction

Transport plays a key role in the economy, enabling the flow of people, goods and services and promoting market integration and productivity growth. An efficient transport infrastructure is one of the basic conditions for regional development, economic competitiveness and investment attractiveness.

An airport is a key element of the transport infrastructure of a city and region, enabling the effective integration of the local economy into the national and international system of trade, tourism and business. As an important transport hub and a significant economic entity, it generates numerous economic links that go beyond direct aviation activities. This impact includes both jobs and added value created by entities operating at the airport, as well as production stimulated among suppliers and consumption generated by employees.

The aim of this report is to provide a comprehensive analysis of the economic importance of Poznań Airport for the city and the region, covering both the airport's current impact on the economy, its historical impact and its evolution over time, as well as the anticipated directions of change in the future. The analysis allows us to determine the role of the airport as an employer, service recipient, generator of added value and catalyst for economic development.

The geographical scope of the study covers the impact of Poznań Airport on the economy of the city of Poznań and the Wielkopolska voivodeship. The analysis takes into account not only the activities of the airport management company, but also entities operating on and within the airport premises, as well as entities co-operating in the supply chain of products and services to entities directly related to the air transport market. The time frame of the study covers the year 2024 as the reference period, as well as an analysis of the historical impact from 2015 and forecasts of the airport's impact on its surroundings for the years 2025, 2032 and 2035, based on scenarios for passenger traffic growth, infrastructure investments and socio-economic changes. In addition, the catalytic impact of

tourist traffic and the fiscal effect were estimated for 2024 and 2025. Also for 2024, key airport-related industries were identified, i.e. sectors of the economy that are most dependent on airport operations, such as transport, logistics, trade and tourism. This analysis allows for the identification of strategic industries supporting the development of the airport.

The methodology used is based on a commonly used approach to analysing the economic effects of airports: direct, indirect and induced impact. The direct impact was determined on the basis of financial data and employment figures for the airport and companies operating on its premises. The indirect impact was estimated by the value of production generated among suppliers, taking into account the structure of purchases and the proportions of activities assigned locally. The induced impact was calculated on the basis of employees' consumption expenditure, adjusted for taxes, contributions and savings.

The results of the study indicate the significant importance of the airport as an economic driver and generator of income and employment.





Characteristics of Poznan Airport



General characteristics of the airport

Poznan Airport (IATA code: POZ, ICAO code: EPPO) is an international airport located approximately 7 km west of the centre of Poznań. **It was opened in 1913 and is one of the oldest airports in Poland.** Since 2006, the airport has been named after the outstanding violinist Henryk Wieniawski.

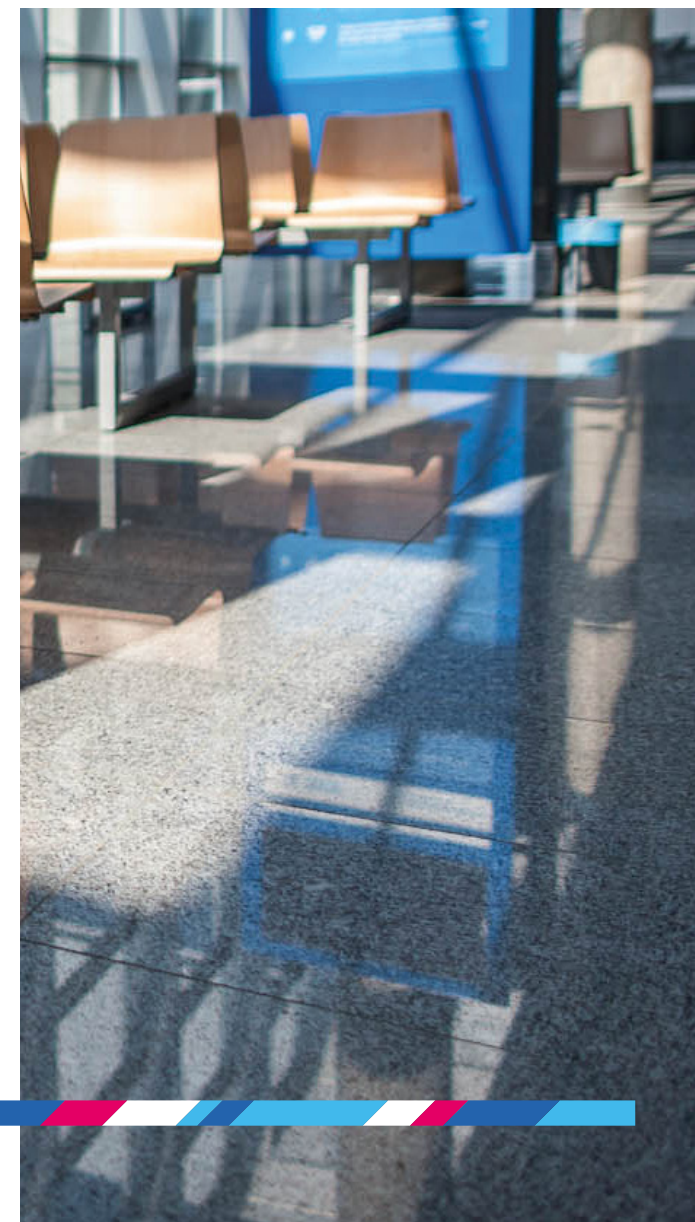
Poznan Airport Limited Liability Company was established as a commercial law company in 1997. Its main activity is the management of the public airport in Poznań, including the provision of aviation services related to the take-off, landing and parking of aircraft in domestic and international traffic, for air carriers and other users operating aircraft, with the exception of tasks belonging to the state air traffic management authority (PAŻP).

Currently, Poznan Airport is owned by three entities: the State Treasury (through Polskie Porty Lotnicze S.A.) (39% of shares), the City of Poznań (37%) and the Wielkopolska voivodship (24%). The share capital at the end of 2024 amounted to PLN 337.4 million (Rejestr, 2025).

Poznan Airport belongs to the PPL Capital Group, whose parent company is Polskie Porty Lotnicze.

Poznan Airport is a key air transport hub in north-western Poland. It operates as a regional transport hub serving Poznań and the Wielkopolska voivodship.

The mission of Poznan Airport is to ensure the best possible air transport connectivity for Poznań and the entire Wielkopolska voivodship. The airport plays a key role in the economic development of the region, being an important factor in its dynamics and investment attractiveness. At the same time, the airport's development is based on the principles of sustainable development, with respect for the natural environment and care for the high competitiveness of the services provided.



Infrastructure and investments

Poznan Airport has a passenger terminal (expanded in 2012), a General Aviation (GA) terminal and a cargo terminal. They have an area of 31,000 m², 1,455 m² and 1,730 m². **The passenger terminal has a capacity of 3 million passengers per year.** The only runway is 10/28, measuring 2,504×50 m. The runway is equipped with a precision ILS II cat. system and lighting. The airport has an extensive taxiway network (approx. 3 km long and 44 m wide) and a parking apron with an area of approx. 4 ha, adapted mainly for handling code C and B aircraft (e.g. Boeing 737, Airbus A320), with the possibility of occasional handling of code E and D aircraft (e.g. Boeing 767-300, 747-400, Airbus A330-300). The (environmental) **capacity of the runway is 132 operations per day.** The airport is currently equipped with **34 check-in desks** and 11 gates. **The baggage sorting capacity is 2,000 pieces per hour.** There are **car parks with 8,200 spaces** at the airport. Car rental companies also operate at the airport.

Over the last fifteen years, Poznan Airport has implemented a large-scale **investment programme** with a total value of approximately **PLN 300 million**. As part of this programme, the passenger terminal has been significantly expanded, including the creation of a new check-in area, the installation of an automatic baggage sorting system and the launch of

a new arrivals area. The airside infrastructure has also been expanded, with additional aircraft parking stands, a parallel taxiway and fast exit roads from the runway. Contactless check-in and automated control solutions have been introduced.

These investments have significantly increased the airport's capacity and raised the standard of passenger service. Recently, smaller modernisation projects have also been carried out to strengthen the terminal and airport infrastructure. Their aim was not only to further improve the quality of service, but also to adapt the airport to changing regulations and operating procedures. In 2025, a thorough modernisation of the central passenger and hand luggage security control area was carried out, involving the replacement of equipment, which made it possible to raise service standards and significantly speed up the process (no need to remove liquids and electronic items from luggage). The number of check-in desks was also increased, including self-service solutions. **As a result of the investments made, Poznan Airport now has modern aviation infrastructure.**



Grzegorz Bykowski, President of the Management Board, Poznan Airport

We are consistently modernising our infrastructure. The terminal, designed in a modular way, has been adapted in recent years to handle significantly higher traffic volumes thanks to the modernisation of the security control area. **We are facing further stages of expansion, covering a larger area and possibly new floors, as well as a change in the terminal's operational layout to ensure the smooth handling of a significantly growing number of travellers.** We are also expanding the airside infrastructure. New parking stands and the reconstruction of taxiways are planned, which will reduce current operational constraints and allow more aircrafts to stay overnight on the apron. All this is part of **the long-term goal of achieving a capacity of 6-8 million passengers per year** – a level comparable to the largest regional airports in the country. Even if the growth rate stabilises temporarily, the outlook for the coming years clearly points to a further increase in demand, and we want to be ready for this development well in advance.

Further work is planned, including the modernisation of aircraft de-icing stations, the replacement of runway lighting with energy-efficient LEDs, and the expansion of the check-in hall. These investments are intended to increase capacity and comfort, while taking into account environmental requirements.

The airport is also preparing to expand the passenger terminal, including the extension of the aircraft apron and the reconstruction of the transport system, including the planned construction of multi-storey car parks. These investments, carried out in stages, will allow for the gradual expansion of infrastructure in line with the growing trend in air traffic. However, they are subject to obtaining the relevant decisions and permits.

In the coming years, Poznan Airport plans to further develop its operations. This will include activities aimed at making airport land available for economic initiatives, in accordance with the provisions of the Local Spatial Development Plan and the General Plan for the City of Poznań. In the long term, the airport authorities also intend to acquire the land located between the car park and terminal area and the race track on Bukowska Street in Poznań, as well as the areas located east of the runway, for use in the development of non-aviation activities. A significant part of the currently undeveloped airport land is planned to be allocated to projects related to improving energy efficiency and developing installations using renewable energy sources.



Wojciech Arszewski, Director of Public Affairs for Central and Eastern Europe, the Middle East and Africa, UPS Poland

The infrastructure factors of Poznan Airport are crucial to our efficiency. We particularly appreciate the great flexibility of the airport authorities and their exemplary cooperation in launching this connection. The ability to operate during the COVID-19 pandemic, when passenger traffic was largely suspended, was very important for us and our customers – the continuation of cargo services allowed us to maintain continuity of supply and stability of logistics chains.

We believe that in the medium term, **Poznan Airport may become an important regional cargo hub, especially in specialised segments (pharmaceuticals, food) and the transport of high-value goods.** If the airport consistently invests in infrastructure and builds long-term relationships with logistics customers, its role in the national air cargo network may increase significantly.

Several key factors determine the maintenance and further development of UPS's presence in Poznań. First and foremost is the city's strategic location – in the centre of a dynamically developing region with strong business and logistics facilities. The high quality of cooperation with the airport authorities and their flexible approach to our operational needs, including the possibility of carrying out operations in the early morning and evening hours, is also very important.



Passenger and cargo traffic and route network

Before the pandemic, Poznan Airport ranked 7th in the country (after Warsaw, Krakow, Gdańsk, Katowice, Modlin and Wrocław) **in terms of the number of passengers handled**. In 2024, it was already **in 6th place**. During this period, the airport recorded one of the highest growth rates in Poland, i.e. +29.3% in passenger numbers (see Table 1 and Figure 1) with a 16.9% increase in the number of operations (see Table 2 and Figure 2). In 2024, over 3.6 million passengers were handled here. **2025 ended with 4.14 million passengers** (+15% y/y). The extraordinary increase in the number of passengers handled (in the first quarter of 2025 it was 28.4% compared to the first quarter of 2024) resulted in Poznan Airport being recognised by ACI EUROPE as one of **the five fastest growing airports in Europe** in the category of up to 10 million passengers (see Table 3).

Table 1. Number of passengers at Poznan Airport in 2015-2025 and growth rate

Year	LCC	Year-on-year growth rate	Traditional	Year-on-year growth	Charters	Year-on-year growth	General Aviation	Year-on-year growth	Total	Year-on-year dynamics
2015	775 095		321 783		397 614		6 426		1 500 918	
2016	940 453	21,30%	355 103	10,40%	408 900	2,80%	5 760	-10,40%	1 710 216	13,90%
2017	954 923	1,50%	408 560	15,10%	484 495	18,50%	4 677	-18,80%	1 852 655	8,30%
2018	1 194 727	25,10%	473 330	15,90%	803 558	65,90%	4 689	0,30%	2 476 304	33,70%
2019	1 061 260	-11,20%	469 155	-0,90%	784 126	-2,40%	4 633	-1,20%	2 319 174	-6,40%
2020	379 744	-64,20%	141 547	-69,80%	134 343	-82,90%	2 075	-55,20%	657 709	-71,60%
2021	513 926	35,30%	152 337	7,60%	385 479	186,90%	3 420	64,80%	1 055 162	60,40%
2022	1 257 569	144,70%	305 441	100,50%	685 610	77,90%	3 808	11,30%	2 252 428	113,50%
2023	1 505 927	19,70%	409 371	34,00%	870 222	26,90%	4 442	16,60%	2 789 962	23,90%
2024	1 986 936	31,90%	516 744	26,20%	1 100 396	26,50%	3 743	-15,70%	3 607 819	29,30%
2025	2 335 300	17,53%	615 230	19,06%	1 190 166	8,16%	4 133	10,42%	4 144 829	14,88%



Figure 1. Number of passengers at Poznan Airport in individual flight segments in 2015–2025

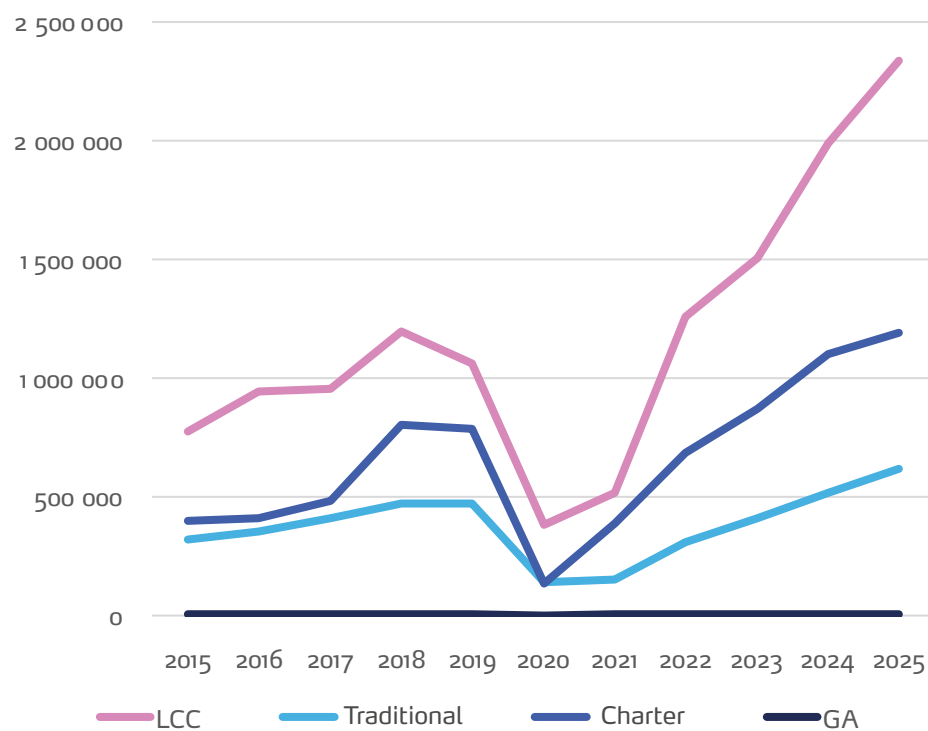


Figure 2. Number of operations at Poznan Airport in individual flight segments in 2015–2025

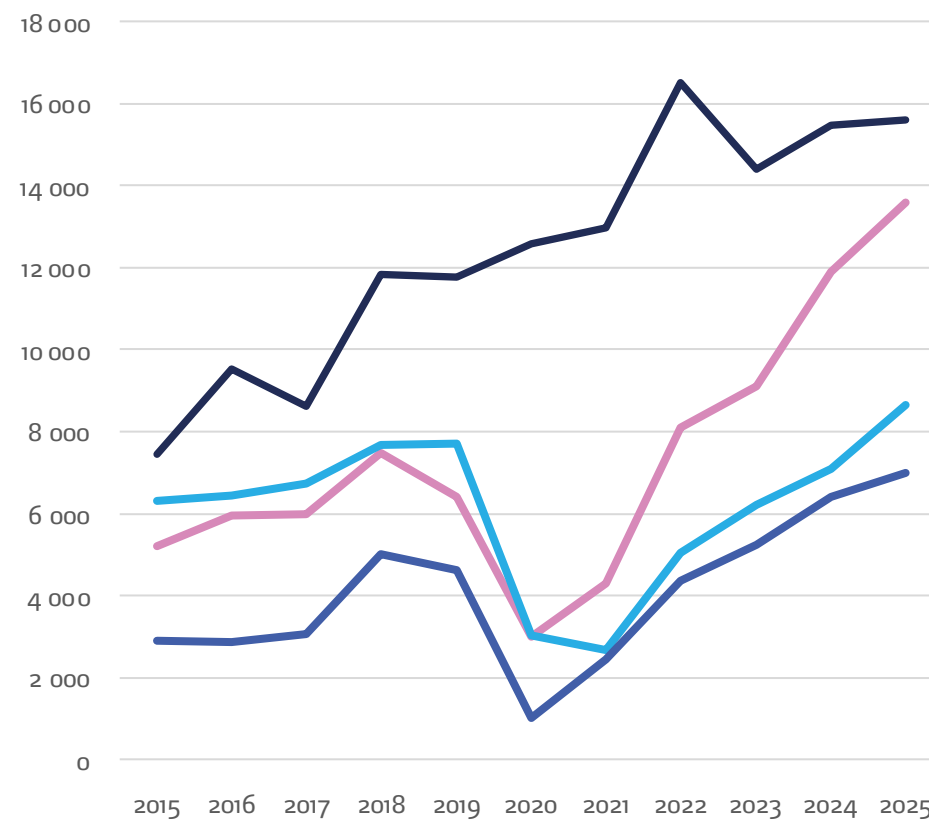


Table 2. Number of operations at Poznan Airport in 2015-2025 and dynamics of changes

Year	LCC	Year-on-year growth rate	Traditional	Year-on-year growth	Charters	Year-on-year growth	General Aviation	Year-on-year dynamics	Total	Year-on-year dynamics
2015	5 203		6 322		2 907		7 444		21 819	
2016	5 961	14,60%	6 436	1,80%	2 850	-2,00%	9 529	28,00%	24 776	13,60%
2017	5 987	0,40%	6 731	4,60%	3 055	7,20%	8 618	-9,60%	24 391	-1,60%
2018	7 468	24,70%	7 688	14,20%	5 003	63,80%	11 841	37,40%	32 000	31,20%
2019	6 409	-14,20%	7 703	0,20%	4 614	-7,80%	11 762	-0,70%	30 488	-4,70%
2020	2 998	-53,20%	3 031	-60,70%	1 002	-78,30%	12 585	7,00%	19 616	-35,70%
2021	4 285	42,90%	2 665	-12,10%	2 458	145,30%	12 974	3,10%	22 382	14,10%
2022	8 097	88,90%	5 040	89,10%	4 354	77,10%	16 507	27,20%	33 998	51,90%
2023	9 103	12,40%	6 219	23,40%	5 235	20,20%	14 409	-12,70%	34 966	2,80%
2024	11 888	30,60%	7 100	14,20%	6 416	22,60%	15 477	7,40%	40 881	16,90%
2025	13 573	14,17%	8 645	21,76%	6 994	9,01%	15 611	0,87%	44 823	9,64%

Table 3. Top 5 airports according to ACI Europe in the first quarter of 2025 (increase in passenger numbers compared to the first quarter of 2024)

Main		Mega airports		Large airports		Medium airports		Small airports	
FCO	9.4%	MXP	12.4%	TLV	60.4%	RMO	56.0%	BBU	1 348.6%
SAW	9.0%	ATH	11.4%	KRK	21.9%	SJJ	41.7%	HTY	272.8%
CDG	5.6%	CPH	6.5%	BUD	15.5%	TRS	41.7%	OST	221.6%
MAD	4.5%	MAN	6.2%	ALC	14.6%	KUN	34.6%	RDZ	190.8%
BCN	3.2%	AGP	6.0%	VLC	14.3%	POZ	28,4	SLM	175,6%

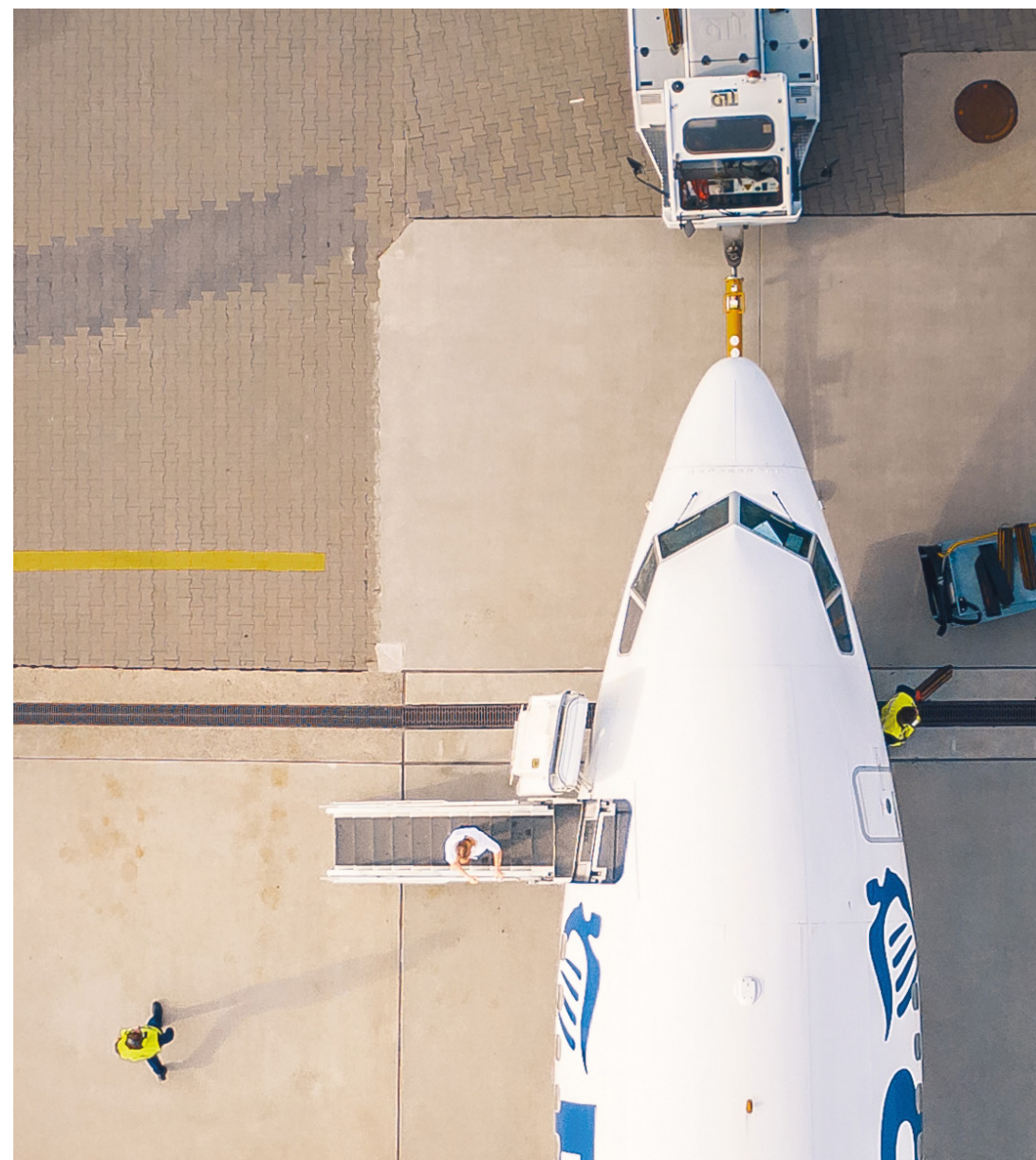
Source: ACI Europe (2025)



Low-cost carriers (LCCs) dominate the air traffic structure – in 2025, low-cost airlines (Ryanair, Wizz Air) served over 2.3 million passengers (56% of the total). Another group is charter flights – in 2024, almost 1.2 million charter passengers (29% share) were checked in at the airport. Traditional airlines (LOT, Lufthansa, KLM, SAS, flydubai) carried approximately 615,000 passengers (15%) from Poznan Airport.

Cargo transport was quite small, but it is growing, with 118 tonnes transported in 2015 and 411 tonnes in 2024, and the forecast for 2025 was 517 tonnes. Cargo is carried on board passenger aircraft. Further development depends on environmental conditions (administrative decisions).

Poznan Airport operates in a highly competitive environment. The biggest challenge is its proximity to Berlin. Statistics show that as many as 15-18% of passengers on Berlin flights come from Poland, which translates into approximately 6 million travellers per year choosing Berlin instead of Polish airports in the western part of the country (Loga Sowiński, 2025). Poznań Airport is trying to reduce this gap by developing its network of connections, especially low-cost and charter flights, in order to keep travellers in the region.



Alicja Wójcik-Gotębiowska,

Head of Comms, CEE & Baltics, Ryanair

Poznań is an important airport in Poland and the region. At Ryanair, we have always aimed to develop regional airports rather than hubs due to their size, which fits in with our operating model (25-minute aircraft turnaround time, fast boarding and offboarding, terminal enabling fast transfers). In this context, Poznań Airport fits very well into our business model, and the city and region themselves are an attractive destination for business and weekend trips.

The decision to choose Poznan Airport as one of our operating bases was influenced by the growing network of connections and passenger interest in flights from Poznań – this was crucial. Basing aircraft there means we can offer very early and late flights, which increases the flexibility of the offer from a given airport. Very good cooperation with the airport and appropriate logistical conditions are further aspects that influenced our decision. Poland is currently one of Ryanair's most dynamically growing markets, and Poznań is an important part of this growth.

Ryanair launched its first connection from Poznan Airport in 2005. Since then, we have been consistently developing in Poznań. In 2017, we opened our operational base. **In 2025, we had five aircraft based at Poznań airport and offered over 35 routes. We are counting on further development of our offer from Poznań.**

Our growth is very dynamic – between 2019 (the year before Covid) and 2025, we grew from less than a million passengers transported annually to/from Poznań (0.9 million to be exact) to 1.9 million passengers in 2025 – that is a 138% increase.



Wojciech Arszewski, Director of Public Affairs for Central and Eastern Europe, the Middle East and Africa, UPS Poland

UPS's first air operation took place in Poznań in February 2017. We are the only cargo carrier operating regularly from this airport. From Monday to Friday, an ATR 72 aircraft flies to Cologne Airport (UPS's main air hub in Europe).

The majority of shipments are parcels of various sizes and weights. **The medical and high-tech sectors are among the industries that most frequently use our services. For companies operating in these areas, fast and reliable air logistics is of particular importance** - it enables the efficient delivery of components, materials or finished products, and in the case of the medical sector, also the timely delivery of critical shipments of high value and sensitivity. At the same time, we handle cargo from many different sectors of the economy – our offer is addressed to companies from various industries, to which we provide flexible and reliable air transport solutions.

The volume of shipments handled at our airport is growing steadily year on year. Due to the dynamic growth in demand, during periods of increased traffic, cargo operations are carried out by up to two ATR aircraft simultaneously, which allows us to efficiently handle the growing volume and maintain high quality services.

The catchment area of Poznan Airport

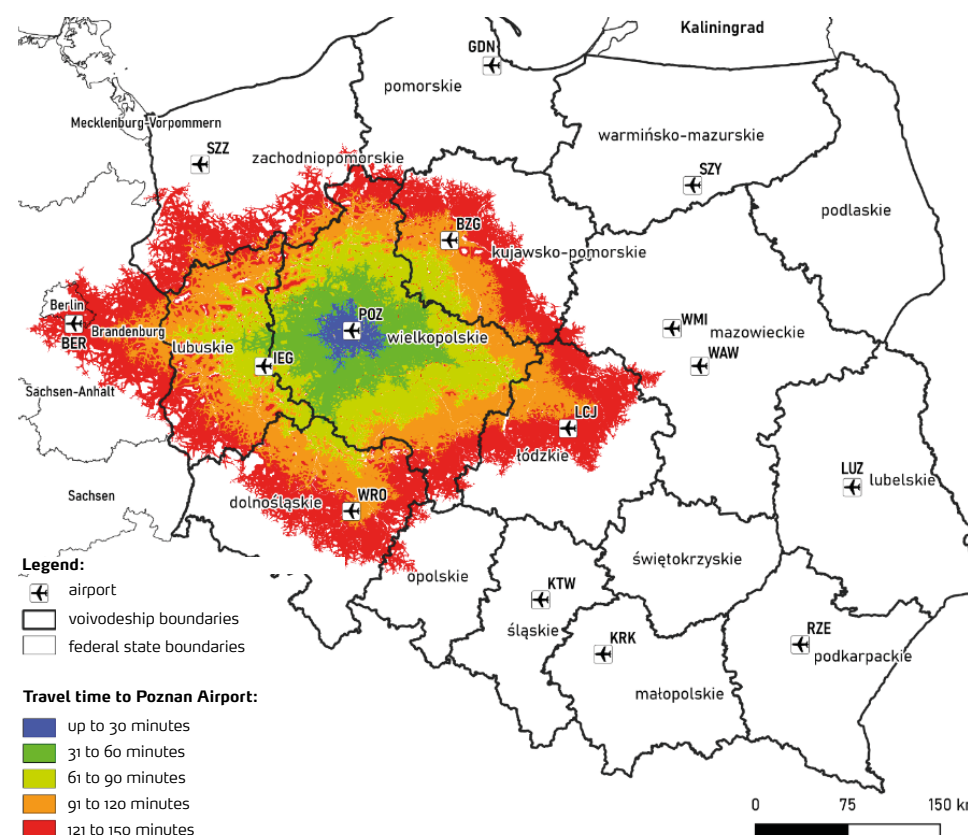
The catchment area of Poznań Airport coincides with the layout of motorways and expressways on the east/west and north/south lines. Within a 2.5-hour drive, the catchment area mainly covers Wielkopolska, but also eastern Germany and the western part of Mazovia. The catchment area within a 2.5-hour drive covers a population of 10 million potential passengers in Poland and 2.6 million in Germany.

Table 4. Catchment area within a 150-minute drive

Zone area	Zone population
Poland	10 043 861
up to 30 minutes	918 126
from 31 to 60 min	902 258
from 61 to 90 min	1 536 266
from 91 to 120 min	3 081 951
from 121 to 150 min	3 605 260
Germany	2 605 602
from 91 to 120 min	182 914
from 121 to 150 min	2 422 688
Total	12 649 463

Source: WB Data for Poznan Airport

Figure 3. Catchment area for Poznan Airport



Financial data

Source: WB Data for Poznan Airport

The financial results of Poznan Airport showed significant increases **in 2024**. **Sales revenue** reached approximately PLN **167.9 million** (28.8% more than in 2023), with costs of approximately PLN 136.5 million. Operating profit amounted to PLN 33.9 million, and **net profit** to **PLN 35.9 million**. The total value of the airport's assets at the end of 2024 was approximately PLN 551.3 million (a decrease of PLN 14 million compared to 2023), while equity increased by 13.1% thanks to the profit generated. Return on assets (ROA) increased to 6.4% and return on equity (ROE) to 12.3%. The debt ratio decreased from 51.5% to 43.7% as a result of the repayment of financial liabilities. The current liquidity ratio improved from 1.13 to 1.58, and the quick ratio from 1.12 to 1.56, which indicates a stable financial condition. The improvement in results was due to increased passenger traffic and better cost control.

Between 2015 and 2019, the company's financial results grew steadily, along with a stable increase in passenger numbers and flight operations. This period was characterised by improved infrastructure utilisation and growing revenues from aviation and non-aviation activities (retail, parking, ancillary services).

2019 was the first local revenue peak before the aviation market collapsed. In 2020-2021, there was a sharp decline in revenues, which was a direct result of the COVID-19 pandemic and restrictions on air traffic. The decline was deep and structural, and the airport operated at a significantly reduced scale. A recovery phase began in 2022, with 2023 and especially 2024 bringing dynamic revenue growth, culminating in record sales in 2024, clearly exceeding pre-pandemic levels (see Figure 4).

Figure 4. Net sales revenue of Poznan Airport in 2015-2024 (in PLN thousand)

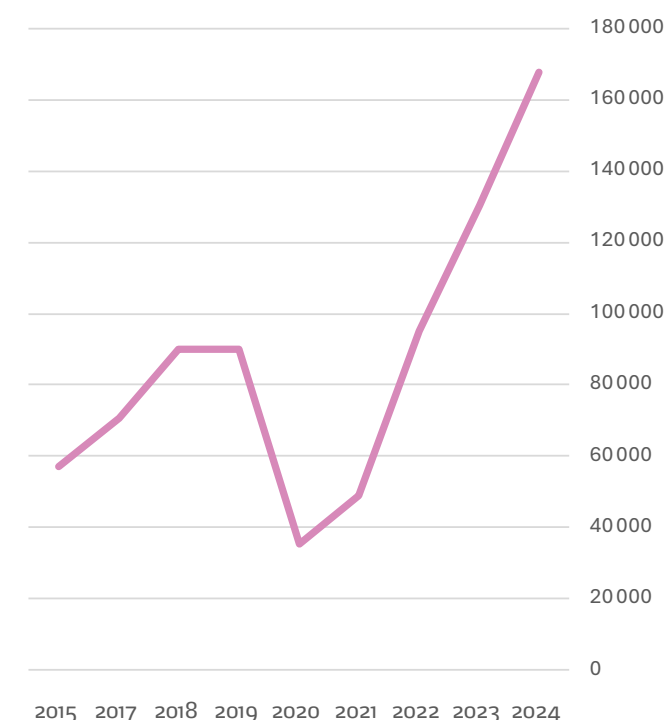
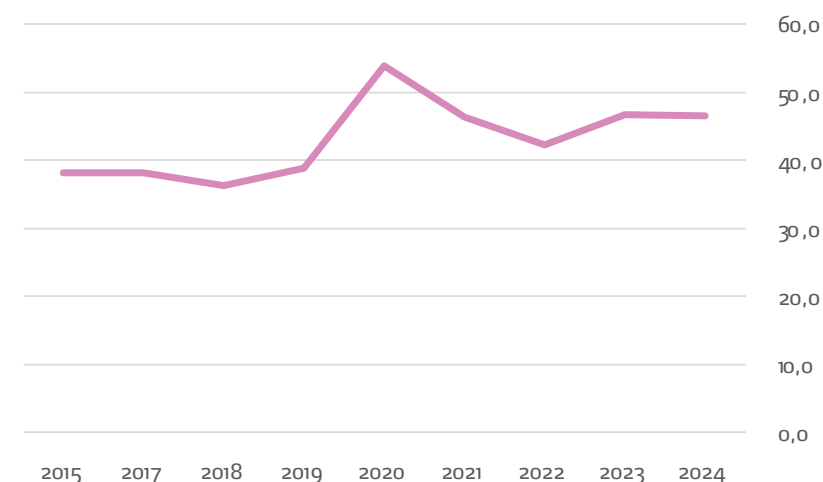


Figure 5. Net profit of Poznan Airport in 2015-2024
(in PLN thousand)



Between 2015 and 2019, revenue per passenger was relatively stable and low, ranging from approximately PLN 36 to PLN 39. In 2020, the indicator increased to PLN 53.8, which was a result of the pandemic – a drastically lower number of passengers with relatively less flexible revenues temporarily increased the unit indicator. In 2021, the level remained high (PLN 46.3), and in 2022, it fell to PLN 42.2. In 2023-2024, the index stabilized at a high, “new” level of approximately PLN 46.5-46.7. This suggests a stabilisation of the revenue structure and offer after the pandemic, as the airport maintained a higher level of revenue per passenger than before 2020, but without further improvement in 2024.

Figure 6. Sales revenue per passenger in 2015-2024





Challenges

The main barriers to the airport's development are environmental and social.

The airport does not have a formal ban on night flights, but it does have a limited pool of night-time slots – a maximum of **12 operations** (take-offs and landings) **for scheduled flights** and **4 operations for general aviation**.

High flight activity during the peak season forces maximum use of these slots, which is sometimes a source of complaints from residents of nearby residential areas. In addition, there is a Restricted Use Area (Obszar Ograniczonego Użytkowania - OOU) – a special aircraft noise zone from which residents can claim compensation for restrictions. For many years, Poznan Airport has been setting aside funds for possible payments of these claims (more in the section "Sustainable development of Poznan Airport"). Other challenges include spatial constraints (the airport is close to buildings) and rising operating costs, e.g. for fuel and maintenance. Finally, the changing geopolitical and macroeconomic environment (global instability, inflation, etc.) poses challenges that are planned to be mitigated through, among other things, revenue diversification and strict cost control.

Sustainable development of Poznan Airport

The development of Poznan Airport has significance far beyond the aviation industry itself. **Today, the airport is not only a key element of the region's infrastructure, connecting Wielkopolska with the main economic centres of Europe, attracting investors, supporting tourism and generating jobs, but also a responsible participant in urban life, which must reconcile economic goals with care for the environment, space and the local community.** The sustainable development of Poznan Airport is not only a requirement of national and international regulations, but also a necessity resulting from the local context – dense urban development, proximity to residential areas and growing social expectations towards large infrastructure entities.

For several years, Poznan Airport has been consistently building its image as an entity that combines economic development with responsibility towards the environment and the local community. The airport's development strategy is a course of action that is in line with EU and national climate goals and sustainable development standards.

One of the most visible examples of this transformation is the investment in renewable energy sources. **Poznan Airport is the first airport in Poland to meet most of its electricity needs from its own photovoltaic farm. The installation, with a capacity of almost 4 MW, has significantly reduced energy consumption in 2024 and achieved savings of PLN 4 million in the company's budget.** There are plans to expand the farm, which in two years' time should allow the airport to achieve up to 90% energy self-sufficiency. In the longer term, the airport also wants to supply renewable energy to nearby businesses.

At the same time, work is underway on solutions to increase environmental efficiency in other areas. As part of the capital group, the company is preparing to report its carbon footprint, map its activities in relation to the European Union taxonomy, and analyse the possibilities of implementing solutions to reduce water consumption, improve waste management and reduce emissions from land transport. The biggest challenge remains the issue of noise. For this reason, work is underway on a new analysis of OOU zone, which aims to update the boundaries of this area and adjust the operating parameters so as to enable the development of

the airport on the one hand and reduce the nuisance to residents on the other.

It is **environmental restrictions, especially those concerning night-time operations, that determine Poznan Airport's capacity in practice today.** The aim is to create conditions that will allow airlines based in Poznań to plan their flights more flexibly, whilst reducing unnecessary noise. Further development is only possible if the right balance is struck between the comfort of residents and the needs of the region's economy. The airport management is in constant dialogue with the unit responsible for flight coordination (granting take-off and landing permits) and carriers regarding strict control of flights within the allocated slots and increasing the share of the fleet operating at the airport that is characterised by lower noise emissions. One of the additional support measures is the planned introduction of a night-time curfew (limiting flights between 1:00 and 5:30 a.m.). Balance can also be seen in the approach to social relations. For years, Poznan Airport has been incurring significant **costs related to the payment of compensation to residents** living in the OOU zone.



To date, this has amounted to **over PLN 150 million**, which is the highest level among all airports in the country. The compensation mechanism itself is justified, but its current scale represents a significant investment burden. Despite this, the airport does not shirk its responsibility and, at the same time, takes measures to build better relations with the local community and improve the quality of life in the airport area.

In 2024, Poznan Airport joined the global “Hidden Disabilities Sunflower” initiative, which aims to support people with invisible disabilities, such as anxiety disorders, autism spectrum disorders and chronic illnesses. As a result, the airport has become one of the few public places in Poland adapted to the needs of this group of passengers, which underlines its commitment to inclusiveness and accessibility of services.

The sustainable development of Poznan Airport also has an economic dimension. Attention to energy efficiency, resource conservation and cost optimisation allows it to maintain stable financial results despite growing passenger traffic. The sustainable development strategy has been incorporated into the company's investment plans. New investments are to be implemented taking into account environmental re-

quirements and low-carbon economy principles. This management model is also intended to facilitate access to green financing and EU funds that support the modernisation of transport infrastructure in line with the EU's climate goals.

In the coming years, Poznan Airport plans to further expand the use of renewable energy sources, implement energy storage systems, continue noise reduction and develop low-carbon transport for passengers. Preparations are also underway for full non-financial reporting, which is intended to enhance the transparency of operations and show the real impact of the airport on the region's economy.



Grzegorz Bykowski, President of the Management Board, Poznan Airport

The key challenge we face as an airport located within the city limits is the issue of noise. Acoustic restrictions determine the way we plan our network of connections and operational development. **Our response is to implement systemic measures, such as: implementing approach procedures that minimise nuisance, promoting fleets that meet the highest acoustic standards, and planning operation schedules in a way that allows for a gradual increase in the number of flights without exceeding the applicable standards.** Our ambition is to reconcile operational efficiency with full respect for the needs of the city's residents. At the same time, we are investing in environmentally friendly solutions with long-term significance. Our photovoltaic farm with a capacity of approximately 4 MW currently covers over 40% of the airport's energy needs, and further stages of its development are ultimately intended to make us independent of external energy sources. At the same time, we are involved in projects related to green hydrogen – both as a potential energy storage medium and a power source for the future fleet of airport vehicles. These are directions that are in line with the European energy transition and the increasingly clear future of low-carbon aviation.

Characteristics of the city of Poznań and the Wielkopolska voivodeship



General information about the region

Wielkopolska is one of the largest regions in Poland in terms of area and population. It covers an area of approximately 29,830 km², which accounts for 9.5% of the country's area, making it the second largest voivodeship (after Mazovia) (GUS, 2025a). The region is located in the western part of Poland, in the Warta river basin, bordering, among others, the voivodeships of Zachodniopomorskie, Lubuskie, Dolnośląskie, Łódzkie and Kujawsko-Pomorskie. The capital and main urban centre is Poznań. **Approximately 3.48 million people live in Wielkopolska** (data as of 30 June 2024), which accounts for 9.3% of the population of Poland. In terms of population, the region ranks third in the country (after the Mazovia and Silesia voivodeships) (GUS, 2025b).

Wielkopolska plays an important economic role, being one of the most dynamic regions in Poland. Historically, it is the cradle of Polish statehood, and today it is a region with an agricultural and industrial character.

Agricultural land covers approx. 58% of the area (WIOS, 2025), which is conducive to the development of highly efficient agriculture (production of cereals, pigs and dairy products).

At the same time, the region is home to numerous industrial plants, including in the automotive (vehicle and component factories), food, furniture, chemical and energy industries. The capital of the region, Poznań, is characterised by a diversified economy with a dominant service sector, but also significant industrial and scientific-technological facilities. Its geographical location in the centre of Europe (on the Berlin-Warsaw route) and developed transport infrastructure (the A2 motorway, railway lines, Poznań Airport) ensure good transport accessibility for Wielkopolska, which translates into the region's investment attractiveness.

It is also worth noting a special area in Wielkopolska, namely the Poznań agglomeration. It includes the city of Poznań and the surrounding counties and municipalities that are strongly linked to it functionally. The core is Poznań, surrounded by the Poznań County (17 municipalities around the city). The agglomeration often also includes neighbouring counties, a significant part of whose inhabitants work or study in Poznań, e.g. Szamotuły, Gniezno, Środa Wielkopolska, Czerńków, Trzcianka and Oborniki. The Poznań Metropolis Association was formally established, covering Poznań and 22 surrounding local governments (including the Poznań County and neighbouring municipalities).

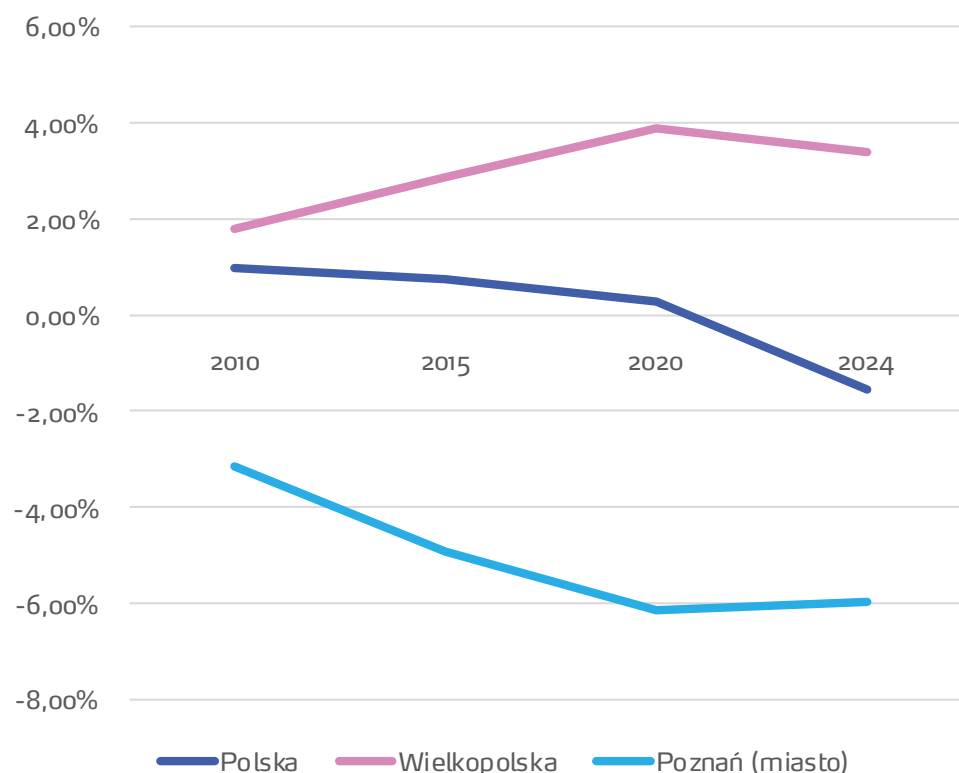
The total population of the Poznań agglomeration is estimated at approx. 1.0-1.1 million people, and its area is approx. 5-6 thousand km² (depending on the boundaries adopted).



Demographics

The population of Poland has undergone changes over the last 20 years. After an increase in the first decade of the 21st century, a gradual decline is now being observed. In 2005, Poland had a population of approximately 38.16 million, while at the end of 2024 it was 37.56 million (a decrease of approximately 1.6%). Against this background, the Wielkopolska voivodeship stands out with its population growth. **Between 2005 and 2024, the region's population increased by 3.4%** (PwL, 2025). It is estimated that the population of Wielkopolska increased from approximately 3.35 million in the mid-2000s to 3.48 million in 2024 (GUS, 2025b). During the same period, **Poznań** (a city with county rights) **recorded a decline in the number of inhabitants**. The city's population **decreased from approx. 570,000 (after 2005) to 536,200 in 2024** (Badam, 2024a). This decline is mainly due to negative natural growth, which will be discussed further. Many Poznań residents moved to suburban municipalities, which reduced the official population of the city despite the development of the agglomeration.

Figure 7. Change in the population of Poland, Wielkopolska and Poznań compared to 2005



Source: own study based on: GUS (2025b), PwL (2025), Badam (2024a)

Despite the decline in Poland's population, the level of urbanisation in the country remains stable, with approximately 59% of the population living in cities (2024). In Wielkopolska, this share is slightly lower (approximately 55%), which is due to the large rural population in this traditionally agricultural region. Nevertheless, the largest cities in the region, i.e. Poznań, Kalisz (approx. 98,000 inhabitants), Konin (approx. 71,000), Piła (approx. 72,000) and Ostrów Wielkopolski (approx. 70,000) are important centres of development. At the same time, the daily functioning of the city involves a much larger population. It is estimated that during the day, Poznań serves almost 1 million people (working, studying, commuting), which is almost twice the number of permanent residents (Poznań, 2025a).

Both Poland and Wielkopolska have been experiencing negative population growth for years. In 2024, it amounted to -4.17‰ nationwide. In Wielkopolska, it was lower, at -2.80‰ (PwL, 2025). The number of births is falling, while the number of deaths is rising, which is related to the ageing of the population. The average age of a Polish resident is approximately 42.7 years, but in Wielkopolska it is slightly lower, at 41.6 years (PwL, 2025). The age structure indicates an increasing proportion of people of post-working age, especially in cities such as Poznań. In the capital of Wielkopolska, at the end of 2024, people aged 60+ accounted for approximately 22% of the population, while the share of children and young people is declining. However, people of working age still constitute the dominant group (approximately 60% of Poznań's inhabitants) (Badam, 2024a). These trends result in demographic challenges, i.e. a shrinking labour force, the need to adapt services (e.g. healthcare) to the needs of senior citizens, and the need to encourage young people to stay in the region (e.g. through the development of the labour market and infrastructure).



Economic growth

Between 2005 and 2024, Poland recorded significant growth in gross domestic product, with a slowdown in 2020 caused by the COVID-19 pandemic. Poland's nominal GDP increased from approximately PLN 983 billion in 2005 to PLN 3,078 billion in 2022 (GUS, 2007; GUS 2024a). This represents a more than threefold increase in GDP over two decades (partly due to inflation, but also to real economic growth). For comparison, Poland's real GDP grew by approximately +65% during this period (an average of approximately 2.5% per annum), which testifies to the country's sustained economic development. The Wielkopolska voivodeship developed at least as dynamically. In 2005, the region's GDP amounted to PLN 92.8 billion, and in 2022 it reached PLN 303.2 billion (GUS, 2007; GUS 2024a), i.e. more than three times as much. **Wielkopolska's share in Poland's GDP increased from approx. 9.4% in 2005 to 9.8% in 2022** (GUS, 2007; GUS, 2024a), which means that the region has strengthened its position as one of the driving forces of the national economy (**Wielkopolska remains in third place after Mazovia and Silesia**). Poznań, as the main city of the region, generates almost 1/3 of the voivodeship's GDP. It is estimated that **the value of Poznań's GDP increased from approximately PLN 30 billion in 2005 to PLN 87.8**

billion in 2022. The Poznań economy not only regained its pre-pandemic level but also reached a record high in 2022 (an increase of +15.4% y/y in nominal terms) (Badam, 2024b).

GDP per capita

Wielkopolska is one of the wealthiest regions in Poland. The GDP per capita of the voivodeship in 2022 was approximately PLN 87,100, which was about 105% of the national average (the region ranks 4th in the country in this respect) (UMWW, 2025). For comparison, in 2005, **GDP per capita in Wielkopolska was PLN 27,553**, i.e. 6.9% above the national average (GUS, 2007). The increase in the wealth of the inhabitants is therefore clear – more than threefold in nominal terms and approximately twofold in real terms over two decades. **Poznań significantly exceeds the average, with GDP per capita in the city reaching PLN 155,300 in 2022, which was almost twice the Polish average** (Badam, 2024b). In this respect, **Poznań is the second city in the country** (after Warsaw). Already in 2005, the level of GDP per capita in Poznań (PLN 53,300) was more than twice the national average (GUS, 2007). This is the result of capital concentration and high productivity in the city. Poznań generates great added value per capita thanks to its developed high-tech industry, business services sector and

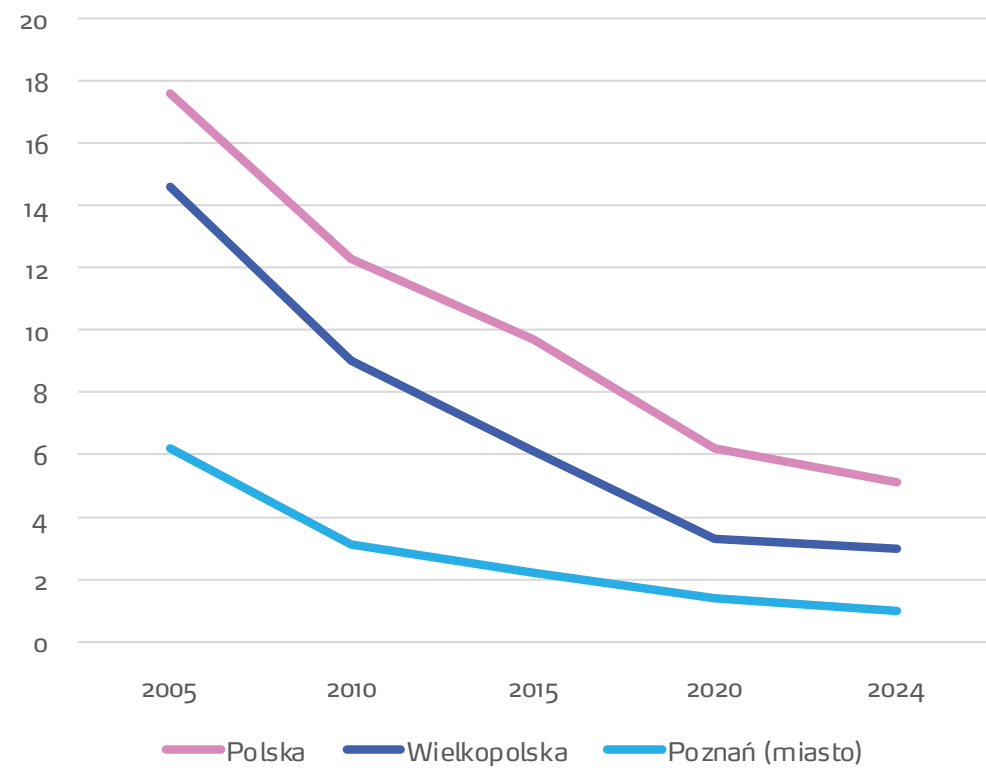
relatively small population (compared to, for example, the Silesian agglomeration).

Unemployment and employment

The labour market in Wielkopolska is one of the strongest in the country, as evidenced by record low unemployment rates and high economic activity among residents. **The registered unemployment rate in the region fell from 14.6% in 2005 to 3.0% in 2024** (GUS, 2025c). Wielkopolska has had the lowest unemployment rate in Poland for years. For comparison, in 2024, unemployment in the country was 5.1%, and in the Wielkopolska voivodeship it was 3.0% (GUS, 2025d). What is more, there is practically no unemployment in Poznań itself. **At the end of 2024, the unemployment rate in the city was only 1% (approx. 3,600 registered unemployed)** (Badam, 2024c). Poznań and the surrounding counties have long been at the bottom of the unemployment statistics in Poland (MRPiPS, 2023).



Figure 8. Registered unemployment rate in Poland, Wielkopolska and Poznań



Source: own study based on: GUS (2025c, 2025d), Poznań (2024)

Employment and wages

The inhabitants of Wielkopolska are characterised by relatively high activity on the labour market. **The economic activity rate** (percentage of people working or looking for work in the population aged 15-64) **in the region is approx. 58-59%**, which places Wielkopolska among the top voivodeships (4th place in the country) (UMWW, 2025). For comparison, the average level of economic activity in Poland is approx. 57% (Q4 2024). The employment rate is also high – according to BAEL, in 2024, approximately 56% of the total population aged 15 and over in Wielkopolska had a job (the highest percentage in the country) (GUS, 2024b). The structure of employment is gradually shifting towards the service sector – in 2022, approximately 60% of those working in the region were employed in services, approximately 32% in industry and construction, and 8% in agriculture. In Poznań itself, the dominance of services is even more pronounced – the service sector accounts for about 80% of jobs in the city, which results from Poznań’s role as an administrative, business and academic centre. Despite this, industry in the agglomeration still provides a significant number of jobs.

The average gross salary in the enterprise sector in Poznań was PLN 9,100 (2024), which ranks third in Poland (after Warsaw and Kraków) (Badam (2024c). Across Wielkopolska, the average gross salary was approximately PLN 6,900 (Q3 2024), slightly below the national average, which is due to lower wages in smaller centres and the agricultural sector. Nevertheless, the real income of residents is growing steadily, reflecting the region’s productivity growth.



Sectoral structure of the economy

The economy of Wielkopolska has a diversified industrial structure, which makes it more resistant to economic fluctuations in individual sectors. In terms of gross value added, approximately 2% of regional GDP is generated by agriculture (including forestry and fisheries), approximately 35% by industry and construction, and over 60% by the service sector (public and market services). This structure is similar to the national average, although Wielkopolska stands out slightly with its stronger agricultural and industrial sectors (PwL, 2025).

The most important industrial sectors in Wielkopolska are: **automotive** (car and component factories), **food industry** (meat processing plants, dairies based on local agriculture), **furniture and wood industry** (concentrated, among others, around Swarzędz and southern Wielkopolska), chemical and pharmaceutical industries, and energy. **The strongest services are: trade and logistics** (Wielkopolska is located at the intersection of transport routes and has large logistics centres), **transport** (a developed freight forwarding and transport services sector), **financial and business services** (Poznań is the 5th largest BPO/SSC centre in Poland – there are **161 service centres** operating here, **employing over 30,000 people**) (Badam, 2024d).

As the centre of the region, Poznań has an economy dominated by services. It is estimated that approximately **72% of the city's gross value added is generated by the service sector, which provides employment for approximately 80% of all working residents of Poznań**. In particular, trade, transport, communication, catering and information together account for about one-third of Poznań's value added (Poznań, 2025b). Despite the predominance of services, industry within the city and its agglomeration remains significant. This is because there are large manufacturing plants operating here, and construction activity is also intense (related to the expansion of infrastructure and housing estates). The region as a whole benefits from synergies – strong agriculture and industry around Poznań provide raw materials and components for plants in the city, and an extensive network of partners (e.g. in the automotive and furniture industries) connects Poznań with neighbouring counties.

Number of enterprises and SME sector

Wielkopolska is famous for the entrepreneurial spirit of its inhabitants. For years, the region has been at the forefront in terms of the num-

ber of registered companies and the activity of the small and medium-sized enterprise (SME) sector. According to the REGON register, at the end of **2024 there were approximately 519,000 entities** in the national economy in the **Wielkopolska voivodeship** (all registered entities, including as many as 378,000 natural persons conducting business activity (sole proprietorships)), which shows that small-scale entrepreneurship is the basis of the region's economy. Over the years, the number of companies has grown steadily – in 2005, there were approximately 400,000 entities operating in Wielkopolska, in 2010 approximately 450,000, and in 2020 the number exceeded 500,000 (with a temporary decline in growth in 2020-2021 due to the pandemic). In 2024 alone, 36,600 new entities were registered in the region and 21,700 were deregistered, which means a net increase of approximately 15,000 companies (PwL, 2025). Importantly, Wielkopolska has one of the highest densities of companies in the country – approx. 149 entities per 1,000 inhabitants (the average in Poland is 138).

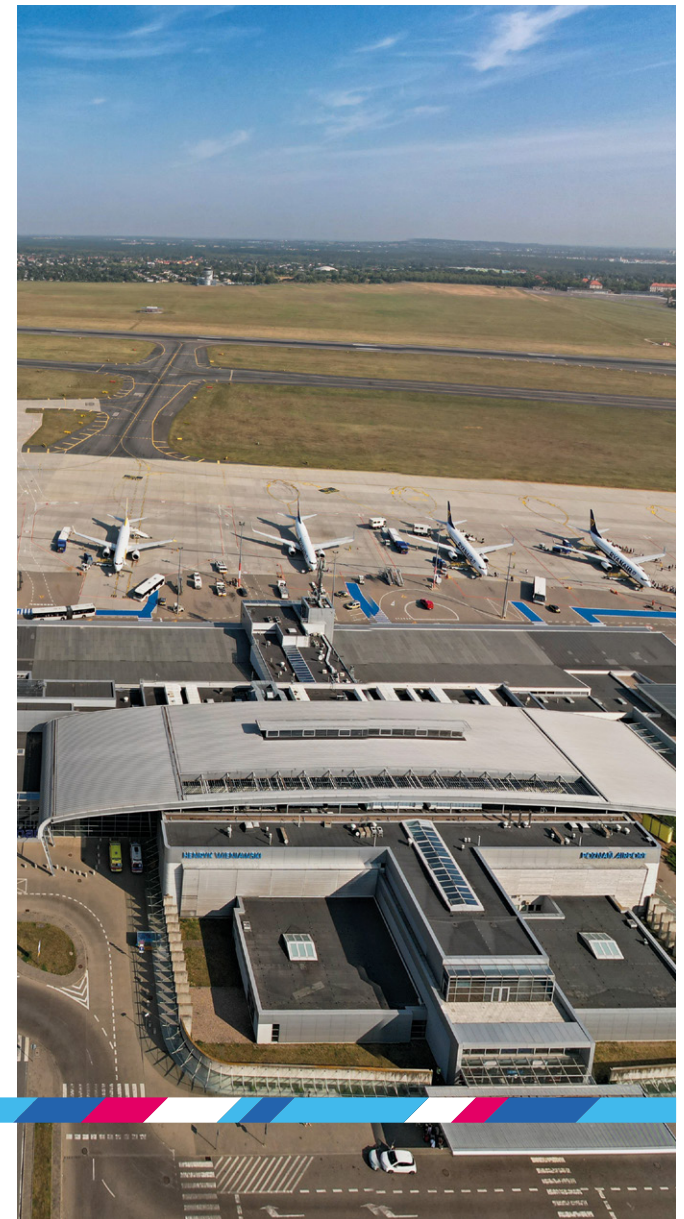
The size structure of companies in the region is typical for Poland – micro-enterprises dominate. Of the approximately 519,000 entities in Wielkopolska, as many as 502,000 (approximately 97%) are micro-enterprises employing

up to 9 people (PwL, 2025). Small companies (10-49 employees) account for approx. 2.5%, medium-sized companies (50-249 employees) for approx. 0.4%, and large companies (250+ employees) for only a fraction of a percent (several hundred entities in the entire voivodeship). This SME structure means that the region's economy is based on dispersed entrepreneurship – thousands of small businesses in trade, services, crafts and small-scale production. Poznań, as the largest city, is home to a significant proportion of these companies. At the end of 2024, there were approximately 134,400 entities registered in the city (Badam, 2024b) (which accounts for approximately 26% of all entities in the voivodeship). The vast majority (97.1%) are micro-enterprises, many of which are sole proprietorships (approximately 61.6% of all entities in Poznań are sole proprietorships).

Poznań stands out for its concentration of large entities – it is the headquarters of a number of listed companies and corporations (e.g. Enea, Jerónimo Martins Polska – owner of Biedronka, Veolia Group, Volkswagen Poznań, Allegro, etc.), which means that there are several dozen companies in the city with more than 1,000 employees.

Inflow of foreign direct investment (FDI)

Foreign investment plays an important role in the economy of Wielkopolska and Poznań, contributing to the transfer of capital, technology and the creation of new jobs. The Wielkopolska voivodeship is one of the most attractive regions for foreign investors (alongside Mazovia, Lower Silesia and Silesia) due to its location, infrastructure and dynamic local market. According to estimates, [the cumulative value of foreign direct investment in Poznań at the end of 2024 amounted to approximately EUR 8.8 billion \(approximately PLN 40 billion\)](#) (Badam, 2024d). This gives an average of EUR 16,400 per capita, which indicates a high saturation of external capital. The cumulative value of FDI in the entire Wielkopolska region is obviously higher (it includes, for example, automotive investments near Września and Poznań, investments in energy, large-scale retail, etc.), but Poznań, as a business centre, accounts for a significant part of it.





Katja Lozina, Director of the Investor Relations Department,
Poznań City Hall

Thanks to its strategic location and wide range of connections to key economic centres, Poznań Airport is one of the most important factors influencing the choice of Poznań as an investment location. The connectivity of the airport is an important factor for investors, both in terms of locating their headquarters and maintaining efficient connections with their global branches or countries of origin. **The development of the airport, and above all the expansion of its route network, has a significant impact on the city's ability to attract highly specialised experts. Easy access to air transport reduces travel time, facilitates relocation and increases the attractiveness of Poznań in the eyes of specialists who often work in an international environment and maintain contact with company branches in other markets.** Good air connections increase the quality of life by enabling regular travel to countries of origin, which is often an important factor when choosing a place of work. Each new connection generates additional demand for employees, increases tourist and business traffic, and thus stimulates the local economy. The operation of an airport also promotes the development of modern service sectors (BPO/SSC, IT, R&D), which rely on close international contacts. These companies often require employee mobility, efficient business travel and the ability to easily transfer staff between branches. A wide range of flight options is therefore an important factor for investors. **The airport thus supports economic devel-**

opment – it attracts talent, supports international companies and increases the city's competitiveness on the global market.

There are already over 290 large investors with foreign capital operating in Poznań. Investments from Western Europe, the USA and Asia dominate – nearly two-thirds of the capital comes from France, Japan, Germany, the USA and the United Kingdom (Badam, 2024d). The largest corporations present in Poznań and the surrounding area include: Volkswagen (Germany, factories light commercial vehicles in Poznań and Września), Bridgestone (Japan, tyre factory in Poznań/Paczków), Mars (USA, plants in Poznań), H&M (Sweden, clothing and accessories distribution), Unilever (United Kingdom/Netherlands, food production), Beiersdorf (Germany, cosmetics), GlaxoSmithKline (GSK) and Delpharm (United Kingdom/France, pharmaceuticals), Exide Technologies (USA, batteries), 3M (USA, industrial materials in Janikowo), Asahi (Japan, beer producer) and retail chains such as Amazon (USA, logistics centre near Poznań). In addition, there is a large group of business service centres for foreign companies, e.g. McKinsey & Company (USA, service centre in the Nowy Rynek complex), Franklin Templeton Investments (USA, finance), OLX Group/Naspers (South Africa, IT), IKEA (Sweden, shared services) and many others.

Wielkopolska continues to attract investment,

as further industrial, office and warehouse projects are underway in the region. To ensure further FDI growth, it will be crucial to provide qualified employees (city investments in education) and develop infrastructure (expressways, modernisation of railway lines, airport expansion). Previous awards (e.g. the title of "The most dynamically developing city in Poland" for Poznań in 2024) (Badam, 2024d) show that the region is perceived as investor-friendly. Local authorities (the Marshal's Office and the City of Poznań) are actively involved in investment promotion, including through Special Economic Zones.

Higher education in Poznań

Poznań is one of the largest academic centres in Poland. The number of students and universities places the city among the national leaders (alongside Warsaw, Kraków and Wrocław). **In the 2023/2024 academic year, over 94,000 students studied here** (Badam, 2024e).

In terms of the number of students per 1,000 inhabitants, Poznań ranks first among the largest cities.

An exceptionally large part of the population is educated here (over 175 students per 1,000 inhabitants, compared to an average of about 120 per 1,000 in large cities). However, the number of students in the city has changed over the years. After dynamic growth in 2005-2010, when it exceeded 140,000, there was a decline caused by a demographic downturn. The lowest number was recorded around 2018 (slightly below 90,000). Currently, a slight increase is again being observed, as the number of students increased by approximately 5,000 between 2020 and 2024, which may indicate a stabilisation of higher education and interest in studying in Poznań (NwP, 2024).

There are **8 public and 17 non-public** (private) **universities** in the city, for a total of 26 higher education institutions. The largest and most

important ones include: Adam Mickiewicz University – a leading university with approximately 29,000 students (2023) and extensive scientific resources; Poznań University of Technology – a technical university (approx. 15,000 students); Poznań University of Medical Sciences (approx. 8,500 students); Poznań University of Economics and Business (approx. 8,000 students); Poznań University of Life Sciences (approx. 6,000 students); Poznań University of Physical Education, Academy of Music in Poznań.

Poznań is attracting more and more foreigners to study. In 2023/2024, over 107,000 foreign students (approx. 8.6% of the total) were studying in Poland (KJ, 2025), and Poznań has played its part in this. Many English-speaking students (including those from Scandinavia and Asia) study at the Medical University, and other universities are also seeing an increase in the number of foreigners (Ukrainians, Belarusians, Indians, Africans). It is estimated that several thousand foreign students are currently studying in Poznań, which accounts for about 5-6% of all students in the city. This is a significant change compared to 2005, when the share of foreigners among students was negligible. The influx of foreign students is, among other things, the result of the Erasmus+ programme and the promotion of English-language courses (e.g. medicine, business).





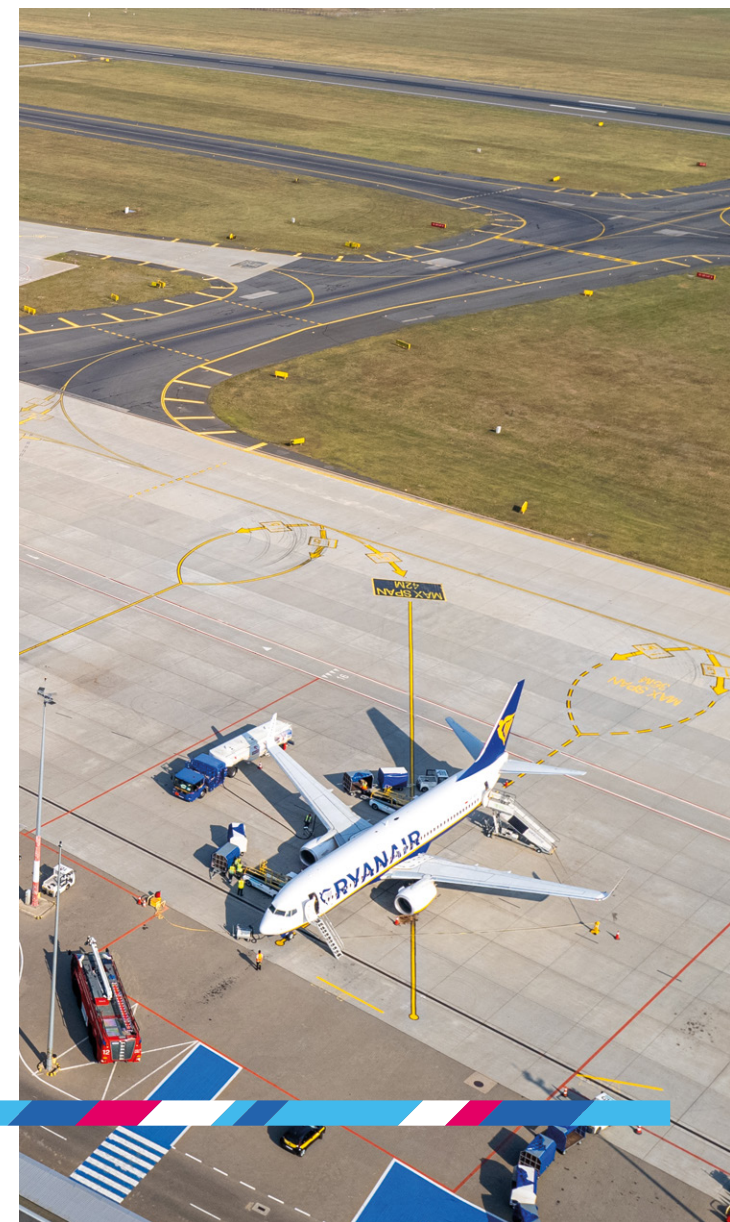
Prof. Barbara Jankowska, Rector, Poznań University of Economics and Business

The question about the role of Poznań Airport for the Poznań University of Economics and Business (PUEB) is a question related to the role of internationalisation in the development of the university. From the perspective of the PUEB rector, I can say with full conviction that the development of our university requires access to global research results and knowledge, modern teaching methods and, above all, relationships with scientists on an international scale. It is thanks to these relationships that we can combine our research ideas, knowledge and skills on an international scale, which allows us to draw on a variety of perspectives and promotes progress. Without international cooperation, it is more difficult to participate in large research grants, publish in renowned journals or exchange experiences at international conferences and seminars with the best academic centres, so that education can be provided using innovative teaching methods and present up-to-date and innovative content to students.

Poznań Airport, by creating opportunities for travel and establishing the aforementioned relationships, is therefore im-

portant from the perspective of fulfilling our University's mission, which involves conducting modern science, competitive teaching and effective cooperation. A university that operates in close proximity to an airport becomes more attractive to ambitious students. The proximity of the airport facilitates the mobility of students and academic staff, promotes international exchange programmes and attracts students. In 2025, a total of 579 trips abroad were made from the PUEB. Poznań Airport is also used by our students (including those travelling on Erasmus) and visiting researchers from abroad (approximately 60 people). It is difficult to imagine the development of international relations without the use of the airport.

The existence of the airport in the vicinity of the PUEB is a factor that increases the attractiveness of the University and Poznań itself. It is an important component of our university's environment, which is even more significant in relation to the PUEB. We are a university that already has international accreditations and certificates and is still applying for further international accreditations.



Tourism

In the last decade, Wielkopolska and Poznań have seen a marked increase in tourist traffic, interrupted only by the COVID-19 pandemic in 2020. After a decline in 2020-2021, the upward trend returned in 2022, and 2024 turned out to be a record year in terms of visitor numbers.

In 2024, Poznań was visited by over 5.3 million people (tourists and day visitors combined). Of these, 1.26 million tourists stayed overnight in Poznań accommodation facilities (Badam, 2025f).

This is the highest result in the history, exceeding the level of 2019 (the last year before the pandemic). For comparison, in 2015, the number of tourists staying overnight in Poznań was approximately 0.8 million, which shows the scale of growth in less than a decade. In the Wielkopolska voivodeship as a whole, traffic also increased. In 2024, nearly 2 million tourists used the region's accommodation facilities, which provided a total of almost 3.9 million overnight stays (GUS, 2025f). For comparison, in 2015, accommodation facilities in Wielkopolska welcomed approximately 1.2 million tourists (2.4 million overnight stays) – thus, over a period of 9 years, there was an increase of approximately

60% in the number of tourists and approximately 63% in overnight stays.

In Poznań, approximately 75% of tourists staying overnight are Polish, and 25% are foreigners. The share of foreigners is therefore significant and has returned to pre-pandemic levels. The main foreign markets are Germany (the largest number of visitors), followed by the USA and the United Kingdom. This structure indicates that Poznań is also becoming recognisable outside Europe (visitors from the USA often combine sightseeing with business or genealogical trips). Other countries generating traffic include Spain, Scandinavia, France, and outside Europe – Israel (pilgrimages, Jewish tourism) and an increasing number of visitors from Asia (e.g. China). In the Wielkopolska voivodeship, the share of foreigners is slightly lower than in Poznań. In 2024, approximately 20% of overnight stays were made by foreign tourists.



Jan Mazurczak, President of the Management Board,
Poznań Tourism Organisation

Poznań Airport is today one of the key pillars of inbound tourism development in our region. For many foreign markets, it is the first and often the only real "gateway" to Poznań and Wielkopolska. Without good air connectivity, it is difficult today to talk about effective international promotion, city breaks or the development of business and event tourism.

Based on tourist traffic research, data from Poznań Airport and partner analyses, we estimate that the majority of foreign tourists – about two-thirds – arrive in Poznań by air, and in the business events segment, this share is even higher. The average daily expenditure of a foreign tourist arriving in Poznań is significantly higher than that of a domestic tourist, especially in the city break and business segments. Air travellers are more likely to use hotels, restaurants and cultural offerings.

With the development of the transport network, we are seeing not only an increase in the number of tourists, but also a clear change in the profile of visitors: more short city breaks, more individual visitors, but also a growing number of participants in business events, congresses and festivals. More and more often, these are conscious tourists, culturally and gastronomically active, which is exactly what we want.

Business and city tourism dominate in Poznań. It is estimated that approximately 60% of arrivals are for business purposes (trade fairs, conferences, delegations), and approximately 40% are typical leisure or sightseeing tourists. In 2024, intense traffic was recorded, among others, during the Poznań International Fair (many industry events returned to their stationary form), as well as during cultural events (festivals, concerts). Poznań is developing the concept of city breaks, attracting tourists for short weekend trips, offering sightseeing (the Old Market Square – Stary Rynek, Ostrów Tumski, etc.), entertainment and gastronomy. Many visitors are also interested in cultural, sports and educational tourism. For example, in 2024, Poznań welcomed football fans (Lech Poznań matches in European cups), Christmas Market enthusiasts, fantasy lovers (Pyrkon festival) and tourists following the Piast Trail (Ostrów Lednicki, Gniezno and Poznań as the beginning of Polish history). Business tourism (MICE – Meetings, Incentives, Conferences, Exhibitions) is also of great importance.

Poznań has approximately 120 conference facilities with a total of approximately 100,000 seats (Badam, 2024e) (including the MTP exhibition halls, Poznań Congress Centre, etc.), making it one of the leaders in the meetings industry in Poland. The high level of event organisation has brought the city awards, such as the CEE Business Services Award 2024 for the fastest growing city in the business services sector (Badam, 2024d). Such distinctions also translate into interest in business visits.





Alicja Wójcik-Gotębiowska, Head of Comms, CEE & Baltics, Ryanair

It is estimated that about one-third of tourists arriving in Poland fly with Ryanair – in 2023, this amounted to about 1.6 million tourists. Each passenger brought in by Ryanair generates about EUR 352 in profit for the region.



Filip Bittner, Vice-President of the Management Board, MTP Group

Poznan Airport plays a key role in the development of the trade fair and congress activities of the Poznań International Fair (MTP). The availability of an extensive network of air connections is one of the factors determining our success. Without adequate aviation infrastructure, Poznań would not be able to compete effectively for prestigious events that rotate around the world. Organisers of large congresses and conferences always require good air transport links. Without an airport with an extensive network of connections, we would not be able to attract major international events. A striking example of the importance of Poznan Airport is the 2027 World Astronautical Congress, an event that Poznań has won for the first time in 30 years. With over 10,000 participants from around the world, the ability to provide convenient flights was a prerequisite for choosing our city. The organisers of such congresses analyse, among other things, the distance from the airport, the number of connections (especially direct ones) and the hotel infrastructure in the area. Thanks to the advantages offered by the airport, Poznań met these criteria.

The cooperation between MTP and Poznan Airport is a strategic partnership and takes place on many levels. The airport actively participates in the promotion of our events, and we adapt our offer to the available connections. For example, during events such as the Tour Salon tourism fair or the Cavaliada international equestrian competition, the airport participates in marketing activities – promoting its services and new flight destinations among participants. As part of this cooperation, the airport also invites its key customers to our fair, organising visits to Cavaliada for them and facilitating their arrival in Poznań. Our cooperation at the operational level is equally important. We maintain constant contact

with the airport before and during major events to coordinate the handling of increased traffic.

The availability of direct flights translates directly into interest in the trade fair from foreign exhibitors and visitors. The easier it is to fly to Poznań, the more willing companies from a given country are to choose our trade fair as a venue for their presentations, and the more visitors from these markets plan to come. For example, the launch of a direct Poznań-Kyiv connection resulted in a large number of exhibitors from Ukraine, while the expansion of the flight network to Italy significantly supported the growth of Italian companies' participation in our events. However, when such convenient connections disappear, a noticeable gap appears – certain markets become more difficult to access, which translates into a decline in the participation of exhibitors and visitors from these countries. We also notice that where there are good connections, international attendance is high.

We observe a similar trend among visitors. Our flagship events attract a wide international audience. For example, over 80% of visitors to the Poznań Furniture Fair come from other countries, with a significant proportion arriving by plane. Convenient flights mean that even industry guests can afford a short, several-day visit to the fair; in the past, with a more modest network of connections, such a trip would often not have been considered at all. From a competitiveness perspective, having a thriving airport is a significant advantage for Poznań over other domestic trade fair centres. Our city combines the advantages of a medium-sized centre with the transport accessibility typical of larger metropolises. Few trade fair cities in Poland can boast this. By comparison, despite its dynamic development, the trade fair in Kielce does not have a nearby airport serving international traffic, which limits its ability to attract visitors from abroad.

Transport and infrastructure

Rail transport

Wielkopolska is an important transport hub in Poland, and its capital is a strategic transport hub on the east-west and north-south axes. Poznań is crossed by international railway lines – the E20 Berlin-Poznań-Warsaw line and the E59 Gdańsk-Poznań-Wrocław line. Thanks to this, the city has direct international rail connections: daily EuroCity/IC trains run to Berlin and further into Germany, as well as to Prague. In addition, night trains connect Poznań with Budapest and, seasonally, with selected European cities.

The national railway network provides Poznań with convenient connections to most major cities in Poland. Express trains (EIC, IC, Pendolino) run to Warsaw (approx. 2h50 travel time), Kraków (approx. 5h), Wrocław (approx. 2h), Trójmiasto (approx. 3 hours 50 minutes), Szczecin (approx. 3 hours 30 minutes) and Łódź (approx. 3 hours). Regional and interregional trains connect Poznań with cities in Wielkopolska (e.g. Kalisz, Konin, Piła, Leszno) and neighbouring regions (e.g. Zielona Góra, Bydgoszcz). The main hub is Poznań Główny – the largest station in the region, serving approx. 20 million passengers annually. Investments in infrastructure are underway, e.g. modernisation of the Poznań-Szczecin line,

plans to electrify sections, construction of agglomeration tunnels.



Katja Lozina, Director of the Investor Relations Department, Poznań City Hall

Poznań Airport is one of the most important elements of Poznań's infrastructure and plays a key role in promoting the city as an attractive place for investors. Poznań is well connected by both rail and road – its location on the A2 motorway, between Berlin and Warsaw, further enhances the city's accessibility. **The airport is a significant asset: it offers an extensive network of connections and an exceptionally convenient location, and is situated within the city limits, close to the city centre and the railway station.**

Bus transport

The railway is complemented by **both long-distance and regional bus connections**. Poznań is a hub for carriers such as FlixBus and Sindbad, offering international bus connections to many European countries. From Poznań, you can take a direct bus to London, Paris, Lviv, Kiev, Vienna, Amsterdam and many cities in Germany (Berlin, Hamburg, Munich), among others. These buses usually stop at Poznań Główny Station. International coach traffic has increased significantly since Poland's accession to the EU (e.g. routes to the United Kingdom for migrant workers) and the opening of the market to low-cost carriers.

In recent years, as part of the Poznań Metropolitan Railway, ticket integration between railways and municipal buses has been introduced, which makes it easier to travel around the agglomeration. The airport has concluded an agreement with the Municipal Transport Authority on the possibility of using the bus stop in front of the passenger terminal for the purposes of contracts covering long-distance bus transport (regional and international).

The airport is connected to the centre of Poznań by a direct day and night bus line, and last year, as a result of negotiations, one additional line serving local residents was redirected to provide support for tourists travelling to and from Poznań Airport.

Public transport in the agglomeration

Poznań and its surroundings have an extensive urban and suburban transport system based on **trams (22 lines) and buses (approx. 80 urban and suburban lines)**. Bus connections link Poznań with neighbouring municipalities. The agglomeration is also served by the aforementioned Poznań Metropolitan Railway – a system of frequent regional trains carrying passengers from cities such as Swarzędz, Oborniki, Szamotuły, Gniezno, Września, Grodzisk Wielkopolski and others to Poznań every 30-60 minutes during rush hour.



Jan Mazurczak, President of the Management Board,
Poznań Tourism Organisation

A city with good connections is perceived as modern, open and worth visiting. Today, air accessibility is part of a city's brand, not just logistics. It is the foundation from which we begin every tourist story about Poznań.

The airport is a natural part of our story about Poznań and the place that tourists experience most often first. There is no tourist presentation that does not feature the airport and its network of connections. It is an obligatory element in our narrative, and the development of the airport and its network of connections translates directly into the attractiveness of our story.

The development of connections has translated into media interest and rankings. We see a greater presence of Poznań in international media, city break rankings and industry reports. Easy access always helps in telling the story of the city, but also in preparing offers and attracting journalists.

Attracting investment and business

Fast transport of goods and staff is key for investors. The A2 motorway and the S5/S11 network allows logistics companies to locate their warehouses here (access to the German market in a few hours). Foreign investors also appreciate the proximity of hubs – the journey from Poznań to Berlin takes less than 3 hours, which in their opinion reduces the “risk of peripherality”. The airport enables fast business travel – a manager from London or Munich can fly directly to Poznań, hold a meeting and return on the same day. This is an argument in talks with, for example, corporations locating service centres here. A good transport network facilitates staff rotation and customer service. Polish companies also appreciate the infrastructure, as many of them have moved to Poznań from smaller towns in the region because it is easier to serve customers in Poland and Europe from here.



Marcin Żurowski, Head of Logistics Real Estate and Legal in Europe, H&M Group

H&M has been operating in the Poznań region since 2007. We employ around 5,000 people here, and the scale of our operations contributes to the development of local logistics, sales and technology competences, as well as strengthening the SME sector.

Wielkopolska is our company's most important logistics and supply chain location in Europe, mainly due to its proximity to the A2 motorway and good road and rail connections to the ports of Hamburg and Gdańsk. These infrastructure elements were key in choosing the location for our logistics operations.

Poznan Airport is an important base for managerial, training and technical operations. Air accessibility supports staff travel, improves knowledge transfer, facilitates international contacts and contributes to lower operating costs. The company also uses air transport, both directly and through logistics partners, for the delivery of goods, samples, accessories and express shipments.

The airport's accessibility is also important in investment processes. The possibility of receiving delegations in Poznań and presenting potential investment sites during a one-day visit is an example of a solution that really streamlines strategic activities and demonstrates the role of Poznan Airport in the development of the region.





Methodology for analysing the economic impact of an airport on its surroundings



Methodology for analysing the economic impact of an airport on its surroundings

An airport is both an infrastructure facility and a business whose role in the economy is multidimensional. First and foremost, it enables the movement of people and goods over long distances, supporting mobility and ensuring the accessibility of the city and region in which it is located.

As a business, an airport generates jobs and income, and the added value it generates is reflected in its distribution to employees, who receive remuneration for their work, entities providing financing, which benefit from interest; shareholders, who receive dividends, the state budget, which receives taxes, and the company, which retains the profit. In addition, the airport plays an economic role by attracting investment and driving the development of sectors such as tourism, trade and logistics. It also has an indirect and induced effect on the economy by generating employment and income in the supply chain of suppliers who provide goods and services to the airport and entities located on and around the airport. Better accessibility of the city and region thanks to air connections supports innovation, knowledge exchange, entrepreneurship

development, foreign direct investment inflows and regional competitiveness. Airport operations also have a social impact, supporting social mobility, cultural exchange and access to education and health services. An important function of an airport is that it is part of the country's key transport infrastructure, supporting the safety and resilience of the transport system.

The economic impact of an airport on the economy is most often calculated using the input-output method, which uses inter-industry flow tables to reflect the links (purchases and sales) between individual sectors of the economy. The economy is presented as a system of interconnected branches, and the flow of goods between them connects all sectors of the economy. On the one hand, inter-industry flows represent successive stages of production, and on the other, the values produced.

Research into the impact of airports on the economy began to develop rapidly in the 1980s. With the growing role of air transport and market liberalisation (especially in the US and later in Europe), there was a need **to justify infrastructure investments economically and to demonstrate the role of airports as catalysts for regional development.** One of the first systematic stud-

ies was the report by S. Butler and L. Kiernan entitled *Measuring the Economic Impact of Airports* (1986), prepared for the Federal Aviation Administration (FAA). This document standardised methods for calculating direct, indirect and induced impacts. It emphasised that airports generate not only operating revenues, but also a broad stimulus for the economic environment.

In Europe, research has developed significantly thanks to Airports Council International (ACI) Europe. A groundbreaking study was the report *Creating Employment and Prosperity in Europe* (1998), which for the first time comprehensively described the role of airports in employment and value added. Income and employment effects were identified. Uniform definitions of direct, indirect, induced and catalytic impacts were introduced in a report entitled *The Social and Economic Impact of Airports in Europe*, produced by York Aviation and commissioned in 2004 by ACI Europe. Subsequent reports commissioned by ACI Europe: *Economic Impact of European Airports*. A Critical Catalyst to Economic Growth (InterVISTAS, 2015) and *The economic and social impact of European airports and air connectivity* (SEO Amsterdam, 2023), confirmed the economic importance of airports.



The first analyses in Poland of the impact of airports on the economy of cities and regions were carried out in cooperation with regional airports in 2005 by a research team from the University of Economics and Business in Poznań, led by Prof. Marek Rekowski. Due to the need to adapt the input-output methodology to the conditions of the Polish economy, as well as due to data availability, the method was modified and the indirect impact was calculated as the sum of non-resident passenger expenditure, while the induced impact was the multiplier effect of the sum of the direct and indirect impacts. Further studies on the impact of Polish regional airports on the regional economy were conducted in 2010. The analysis methodology was enriched with the experience gained during the research carried out in 2005-2008. Due to the fact that the financial data referred to 2009, a year marked by the financial crisis which also affected the air transport market, the results of the studies should be treated with caution.

The results of the research on the impact of airports on the economy:

- **justify the need to expand airport infrastructure**, including investment decisions using public and private funds; assess the return on investment in terms of income

and employment for the economy; quantify the positive external effects of airport operations in terms of regional development.

- **support airport development planning**, including airport infrastructure development, increasing the number of air connections, and planning promotional activities.
- **support regulatory and planning decisions**, including decisions on the location of new terminals, aprons, runway modernisation, environmental procedures (e.g. necessary for cost-benefit analyses) and spatial development plans around the airport.
- **strengthen the position of airports in transport policy**, including support in competing for public funds, and data on added value and employment are a tool for argumentation for central and regional authorities.
- **help to estimate the costs of lost benefits**; including support in quantifying the effects of restrictions on the operation of entities active in the air transport market, e.g. night flight restrictions; flight restrictions due to aircraft noise; taxation of air transport services.

- **support the monitoring of changes in the economy in the face of crises and growing competition**, including research results that determine the effects of changes in air traffic in connection with, for example, the closure of airspace and changes in bilateral agreements; they provide support in planning employment and investment policies.
- **highlight the role of airports as catalysts for development**, including the impact of airport activity on transport accessibility, the development of exports and high-tech sectors, the attraction of foreign investment, and the development of tourism and business services.

The input-output method allows the broader impact of an airport on the economy to be identified and calculated. According to the input-output method, the effects created in the economy by an airport are identified as direct, indirect and induced effects. In addition, the catalytic (stimulated) effect is analysed.



The direct impact includes the added value and employment generated by the airport operator and companies that support the airport's operations, including airlines, handling companies and air traffic controllers.

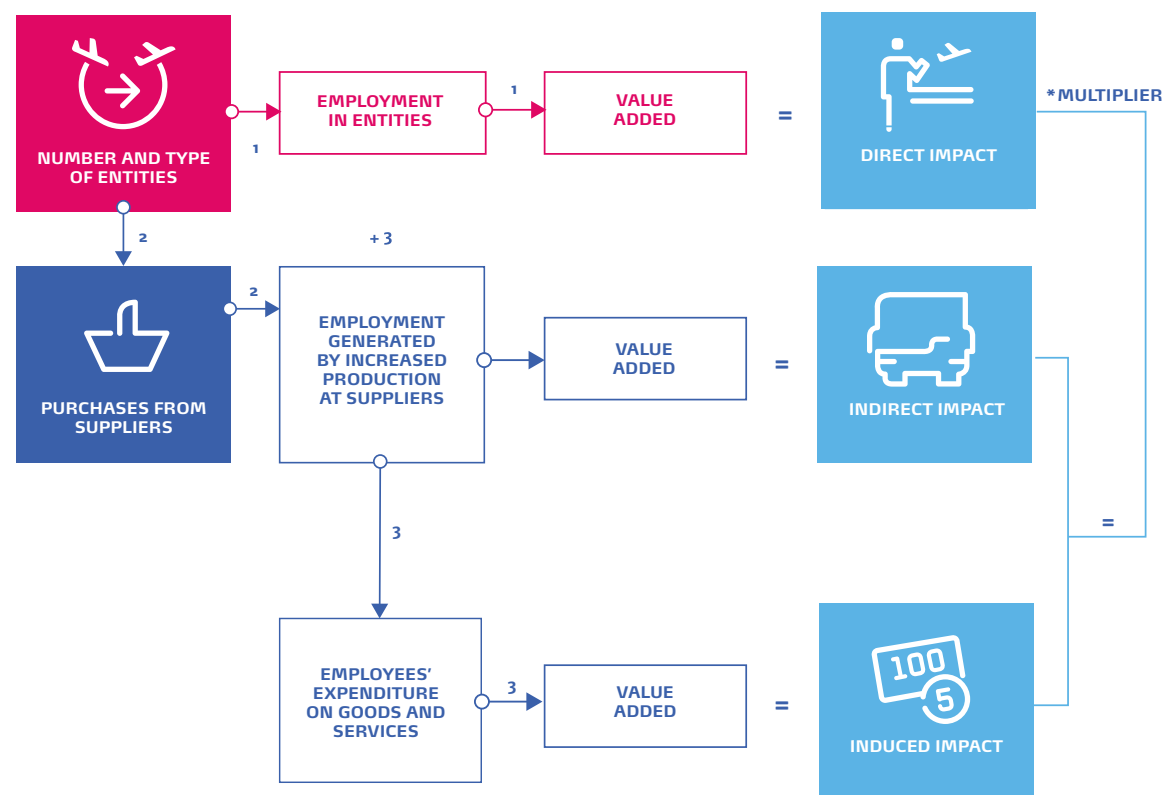
The indirect impact is the employment and added value created in the supply chain to companies located at and within the airport.

The induced impact is the demand for goods and services generated as a result of expenditures by persons employed in entities directly and indirectly related to the operation of the airport. The induced effect is therefore a multiplier, income effect of the sum of the direct and indirect impacts. The diagram of direct, indirect and induced impact is shown in Figure 9.

The catalytic impact is the employment and income generated in the economy as a result of the airport's impact on the growth of economic activity and efficiency, among other things through investment and tourist traffic.

The economic impact of an airport on the economy is primarily reflected in **the generation of added value (income effect)**, i.e. the entity's contribution to GDP, and in **the creation of jobs (employment effect)**. It should be emphasised that the impact is not the sum of these effects, as they are different aspects of the impact: added value measures the financial effect of the airport's activity on the economy, while the number of people employed shows its impact on the labour market.

Figure 9. Diagram of the direct, indirect and induced impact of an airport



Source: (Huderek-Glapska, 2011)

Value added is considered to be the most objective measure of a company's performance. To calculate the income effect, i.e. the value added generated by a company, a standard methodology from the System of National Accounts (SNA) is used. According to the definition provided by the Statistics Poland (GUS), value added is calculated as the difference between gross output and intermediate consumption (production side) or as the sum of employment-related costs, depreciation of fixed assets, gross operating surplus and other taxes less subsidies related to production (income side).

In the aviation industry, added value reflects the impact of companies operating in the air transport market on the GDP of a city, region and country, and also forms the basis for calculating multiplier effects, i.e. indirect and induced effects.

Direct impact

The direct impact results from the direct activity of the airport and includes the generation of added value and job creation. **The direct income effect** is calculated as the gross added value created by the operation of the airport. Added value can be calculated using various approaches. One of them is to determine the surplus generated by calculating sales revenue and deducting the costs incurred by the company.

The direct employment effect is the number of employees who are employed at the airport and in entities directly related to the airport's operation, converted into full-time equivalents.

The income method is most commonly used in analyses of the direct impact of airports on the economy. This approach is used by Airports Council International (ACI) in its calculations of the socio-economic impact of European airports (SEO, 2024). According to this approach, the direct impact is the product of the number of employees working in entities operating at and within the airport and the average value added per employee. The number of employees is obtained from surveys or direct interviews conducted

among entities operating at and within the airport, while the average added value is published in regional accounts by statistical institutions such as EUROSTAT or GUS.

A different approach is used in the report prepared by TOR (Zespół Doradców Gospodarczych TOR Sp. z o.o.) for Polskie Porty Lotnicze (PPL, 2025). The direct impact was estimated as the value added generated by the airport's operations based on the amount of revenue. However, the authors do not clearly specify the methodology for analysing both the direct impact and other components of the economic impact, which makes it impossible to compare the data.



In this study, the direct impact was calculated as the sum of the added value generated by the airport operator and the added value created by entities operating at and within the airport. This is the most accurate method of calculating the income effect.

The added value created by the airport operator was calculated in accordance with the income approach based on financial data obtained from financial statements. The added value created by entities was calculated as the product of the number of employees and the average added value per employee, taking into account the type of activity according to the Polish Classification of Activities (PKD).

The number of entities and the number of airport ID card/badge issued in 2015, 2024 and 2025 were obtained from Poznań Airport. The entities were divided into groups in accordance with PKD. The number of passes was adjusted to the entities. Based on the number of passes and data obtained from some entities, employment

in entities operating on the premises and within the airport was estimated. In the case of entities for which passes were not issued (e.g. companies providing services on the public side or operating externally for the airport), employment was estimated on the basis of average accounts of Statistics Poland and PKD industry data relevant to the type of activity.

Apart from the airport operator, entities operating within the airport infrastructure can be divided into four categories according to the type of activity: entities performing activities directly related to aircraft, passenger and cargo handling; airlines and entities related to air traffic, commercial entities not related to aviation activities; public services and administration.

Table 5. Entities operating at and within the airport – examples

Airport operations	Airlines and entities related to air traffic	Commercial activities not related to aviation	Public services and administration
▪ Handling agencies ▪ Aircraft maintenance ▪ Fuel distributors	▪ Airline agencies ▪ Air traffic control (ATC) ▪ Tour operators ▪ Freight forwarders, logistics companies	▪ Duty-free shops ▪ Retail outlets ▪ Restaurants and cafés ▪ Car rental ▪ Banks	▪ Border guard ▪ Emergency services ▪ Police

Source: ACI Europe (1998)

The diversity of entities operating at and within the airport indicates that the airport functions as a complex economic ecosystem, a logistics services platform, a transport hub with ancillary services, and a multifunctional service and economic centre, going far beyond the mere handling of air traffic.

Indirect impact

Indirect impact refers to expenditure on products and services that are used by the airport and entities operating at and within the airport as part of their core business activities. Purchases from suppliers constitute induced production in the economy in entities that are indirectly related to the airport's activities. Thanks to increased production, suppliers employ additional people and generate additional added value in the economy. Indirect income and employment effects arise, which are calculated using inter-industry flow tables. These tables reflect the relationships between different sectors of the economy, showing how the products of one sector are used by other sectors of the economy. Based on input-output tables and using average values of labour productivity and value added per employee, calculates the indirect income and employment effects. At the time of the

study, the most up-to-date inter-industry flow tables were the „Balance of inter-industry flows at current base prices in 2020” published by the Central Statistical Office in 2024 (GUS, 2024c). The input-output table shows the links between sectors of the economy (industries), measures the flows of goods and services between them and within sectors, taking into account production, consumption (semi-finished products, raw materials), value added, investments and exports/imports. It was assumed that the structure of the regional economy (Wielkopolska) corresponds to the structure of the national economy for which the input-output tables were prepared. In addition, it was assumed that the production relations between sectors have not changed significantly, hence the latest current (available at the time of writing) inter-industry flow table compiled in 2020 is representative of the structure of the economy in 2024.

Induced impact

Persons employed by the enterprise and employees of suppliers of products and services whose work is indirectly dependent on the economic activity of the enterprise, thanks to the remuneration they receive for their work, purchase consumer and investment goods, thereby

generating demand throughout the economy. This impact is called the induced effect and depends on the activity of the enterprise in a multiplier manner. The induced impact is calculated by adding up the value of the wages of employees whose work is directly and indirectly related to the functioning of the surveyed company.

Total impact

The total economic impact generated by the airport operator and entities operating at and within the airport, calculated using the input-output method, includes direct, indirect and induced effects.

The total employment effect is the number of jobs generated in the economy thanks to the activity of the airport and entities operating on and around the airport premises.

The total income effect is measured by the gross value added generated by the direct activities of the airport and entities operating on its premises and in the supply chain of products and services to the enterprise, as well as by a multiplier effect throughout the economy.



Catalytic effect

In addition to generating employment and added value through the direct, indirect and induced activities of the airport, there are also long-term effects related to the inflow of investment, tourist traffic and the impact on the location decisions of enterprises, which is referred to as the catalytic effect.

The catalytic effect of Poznań Airport was calculated on the basis of the impact of tourist traffic on the economy of the city and the region as the added value generated by the expenditure of passengers arriving by air to the region. The expenditure of tourists arriving in the city and region via Poznań Airport goes to various sectors of the economy, including hotels, restaurants, local transport, entertainment and retail services, supporting additional economic activity outside the airport. On this basis, it is possible to estimate not only the additional GDP supported by air tourism, but also the number of jobs created as a result of this spending, taking into account the average productivity per employee in tourism-intensive sectors. As with the other categories of economic impact, the catalytic impact was calculated in gross terms, which in the case of catalytic effects means that

the expenditure of Poznań and region residents in other places they visit for tourism was not taken into account.

Fiscal effects

The impact of the airport on the socio-economic environment can be considered in terms of fiscal effects, i.e. the amount of taxes paid by the company to the local or national budget.

Fiscal effects mainly include:

- 1. Taxes on corporate income (CIT)** – on profits generated by the airport,
- 2. Taxes on personal income (PIT) and social security and health insurance contributions** – on salaries paid to employees,
- 3. Local taxes and other charges** – including property tax.

The airport's financial data for a given year, including the profit and loss account and information on employment and salaries, is used to estimate the fiscal impact. It is worth noting that

the calculated fiscal impact reflects only the direct charges related to the airport's operations and its employees – it does not include indirect and induced effects arising in the local economy through supply chains and consumption.

Taking into account the fiscal effects allows us to complete the full picture of the airport's economic impact, showing not only the added value and employment generated, but also the airport's contribution to public finances.

Limitations of the input-output method

Despite its popularity, input-output analysis is not a tool without limitations. One of its significant limitations is that it ignores the financing aspects of investments, which in practice means assuming that infrastructure investments are financed by debt, without taking into account the potential negative consequences of such financing. Meanwhile, a full assessment of the functioning and development of infrastructure requires a comparison of the economic effects achieved with the costs and financial outlays incurred.



It is difficult to compare results due to the lack of methodological uniformity in empirical studies. For example, in analyses conducted in the United States, indirect impact is often estimated on the basis of non-resident expenditure, while in Europe and Canada, input-output tables or appropriate multipliers are used. Another problem is the ambiguous definition of the airport's area of influence – the wider the area of analysis, the greater and more dispersed the indirect and induced effects, but at the same time the smaller the relative share of employment and income effects in the overall economy of the area.

Furthermore, this method is based on estimating gross effects, taking into account all generated effects, not just those that are actually the result of the airport's operation. It ignores the fact that in the absence of an airport, some of the labour and capital resources could be used in other sectors of the economy.

An additional limitation is the lack of distinction between newly created and distributional effects – at the local level, the effects may be perceived as new, while at the national level they may only represent a shift in economic activity.

Finally, the input-output analysis is static in na-

ture, as it is based on data from a single base year. However, air transport is highly dependent on the economic situation, which means that the results obtained in years of strong economic growth may be overestimated, while analyses conducted during periods of recession may underestimate the actual impact of airports on the economy.

A complete picture of the impact of an airport on its surroundings: positive and negative effects

It should be emphasised that the input-output method focuses on short-term demand effects, which by definition lead to positive results in terms of income and employment growth. This mechanism is based on the multiplier effect of expenditure generated by the airport and related entities, which means that the results obtained almost always indicate a positive economic impact. However, this method does not take into account long-term structural effects or potential opportunity costs, and therefore does not provide a complete picture of the airport's impact on its surroundings.

For a comprehensive assessment of the airport's impact, it is therefore necessary to take

into account – and, where possible, quantify – other positive effects, such as the impact on the location of businesses and their efficiency. At the same time, it is crucial to identify and estimate the negative effects, which are usually overlooked in analyses based solely on the input-output method. This applies primarily to environmental impacts such as air pollution, greenhouse gas emissions and aircraft noise, which generate real social and economic costs. Taking these elements into account is essential for a balanced and reliable assessment of the role of the airport in the socio-economic development of the region.



The economic impact of Poznan Airport in 2024



The economic impact of Poznan Airport in 2024

The economic significance of Poznan Airport was calculated using the input-output method, according to which the effects created in the economy by the airport are identified as direct, indirect and induced impacts. In addition, the catalytic (stimulated) impact is analysed.

Direct impact in 2024

The direct impact is related to the operation of the airport and includes the added value (income effect) and employment (employment effect) generated by Poznan Airport and entities operating at and within the airport whose activities are directly related to the functioning of the aviation market.

In this study, the value added generated directly by the airport operator was estimated in accordance with the income approach used in the System of National Accounts and in analyses of the economic impact of airports

commissioned by ACI Europe (York Aviation, 2024; Oxera 2009; InterVISTAS 2015; SEO, 2024). Value added was calculated as the sum of three basic components: labour costs (wages and social security contributions financed by the employer), depreciation of fixed assets and operating surplus (profit from operating activities). Value added also includes taxes and fees related to airport operations, treated as taxes on production. In accordance with the SNA methodology and ACI guidelines, income taxes, financial results (interest and other financial costs) and extraordinary profits, which do not reflect the company's contribution to the generation of gross domestic product, were excluded from the calculation. Income tax and financial results create other effects in the economy known as fiscal effects.

Added value reflects the direct economic contribution of the airport to the economy, being a measure of the income generated from its core operating activities. The added value (income effect) of the airport operator was calculated on the basis of the financial statements of Poznan Airport for 2024. **In 2024**, the added value generated directly by the airport operator amounted to **PLN 115.6 million**.

Referring the amount of added value to the number of people employed by the company, which in 2024 amounted to 410 FTE, it can be estimated that the average added value generated per airport employee is **PLN 281,891**, while the average added value per employee for all PKD sectors in Poland, forecast for 2024 on the basis of GUS data and exponential regression extrapolation, is **PLN 220,767**.

This shows that Poznan Airport generates above-average added value per employee (labour productivity), which indicates its high efficiency and effectiveness in creating economic value per employee. This indicator is quite important as it shows the efficiency of resource use at the airport compared to other sectors of the economy. This information can be used as an argument in the discussion on resource allocation.

The analysis of the direct economic impact of the airport uses an expanded definition in line with the ACI Europe methodology, according to which the direct impact includes not only the airport's activities as an infrastructure manager, but also all companies physically operating at the airport and directly involved in handling air traffic, passengers and cargo. This category the-



refore includes the employment and added value generated by handling agencies, entities responsible for aircraft maintenance, operational services, as well as selected commercial and service companies whose operations are closely linked to the airport's activities.

In 2024, there were 98 entities operating at and within the airport. The structure of entities operating at the airport is very diverse and includes both companies directly involved in aviation operations and a large group of commercial companies and public institutions. The entities have been divided into categories in accordance with the classification used by Airports Council International (ACI), which allows for a better understanding of the scope of their activities at the airport and identification of their main business functions. It should be added that one entity may operate in different categories. In this case, a given entity was assigned to a given category only once. The main category of an entity was selected based on its key activity.

Table 6. Entities operating at the airport in 2024 by category and type of activity

Category	Type of activity	Number of entities
Airport operations	Airport	1
	Handling agents	2
	Aircraft maintenance	1
	Aviation fuels	2
Airlines and aviation-related entities	Airlines	9
	Air traffic control	1
Non-aviation commercial activities	Catering	3
	Shops	3
	Travel agencies	6
	Car rental	13
	Currency exchange	1
	Banks	5
	Vending machines	2
	Other	43
Public services and administration	Police	1
	Customs	1
	Border guard	1
	Meteorological services	1
	Emergency medical services	2
Total		98

Table 6 presents the complete structure of entities operating at and within the airport, grouped into four main categories of activity in accordance with the nomenclature used by ACI: airport operations, aviation and related entities, non-aviation commercial activities, and public services and administration.

The group of entities within the airport operations category covers key airport operational functions necessary to ensure the continuity of air traffic. The most important entity in this category is the airport infrastructure administrator, Poznan Airport. The second strategic entity is the handling agent – Welcome and Aero Masters. The fuel category includes Orlen Aviation and Lotos Air BP.

A key segment from the point of view of air mobility are airlines and aviation-related entities. The relatively high number of airlines reflects the diversity of carriers and indicates the importance of the airport in regular (both traditional and low-cost) and charter traffic. The entity responsible for air traffic management is the Polish Air Navigation Services Agency (PAŻP).

The largest and most diverse group consists of entities belonging to the category of „com-

mercial activities not related to aviation”, which emphasises the role of the airport as an economic ecosystem and local service centre. This segment is important for the airport’s revenues, supporting its financial stability through diversification of revenue sources. The key entity in this category is Baltona, which, following the redevelopment of the commercial zone, has significantly expanded its activities and at the same time has become a major generator of jobs.

The added value created by entities operating at and within the airport was calculated as the product of the number of employees and the average added value per employee, taking into account the type of activity according PKD.

In total, 1680 employees (employment is expressed in full-time equivalents) were employed by entities operating at and within the airport in 2024.

The airport operator is the largest employer, creating 410 FTEs, which accounts for 24.4% of total direct employment. The second largest employer is the handling company Welcome and other entities offering ground services. Employment

in airport services accounts for 21.3% of total direct employment. Employment in the airline sector stands at 17.1%, and in security services at 15.1%. Employment in trade and services, meanwhile, accounts for 11.8%, which is in line with the rapidly growing non-aero sector. The full employment structure, broken down by entity type, is shown in Figure 10.





Grzegorz Bykowski, President of the Management Board,
Poznań Airport

Poznań Airport has become one of the key job creators in Wielkopolska. We employ several hundred people, but the actual number of jobs related to the airport's operations is several times higher. It includes handling, technical, service and catering companies, shops, transport and the hotel sector. **We are talking about several thousand people whose daily professional activities are directly or indirectly related to air traffic. Each additional passenger is an economic stimulus that spreads further across the region.** Entrepreneurs, universities and organisers of the largest business events in Poland also build on this foundation. Representatives of globally operating companies, for whom network connections are a basic tool for conducting international business, have a significant share in the passenger structure. Foreign students, especially exchange programme participants, not only fill aeroplanes, but also drive the local service and real estate market, and maintain relationships with the city after their return, which builds long-term ties. Similarly, the trade fair and conference sector – major events can generate hundreds of additional visitors in a short period of time, to which we respond in cooperation with carriers and the hotel industry. The traffic generated by the presence of American troops in the region also remains stable, although less visible in public debate. All these streams together make up a balanced passenger portfolio that is resistant to fluctuations.

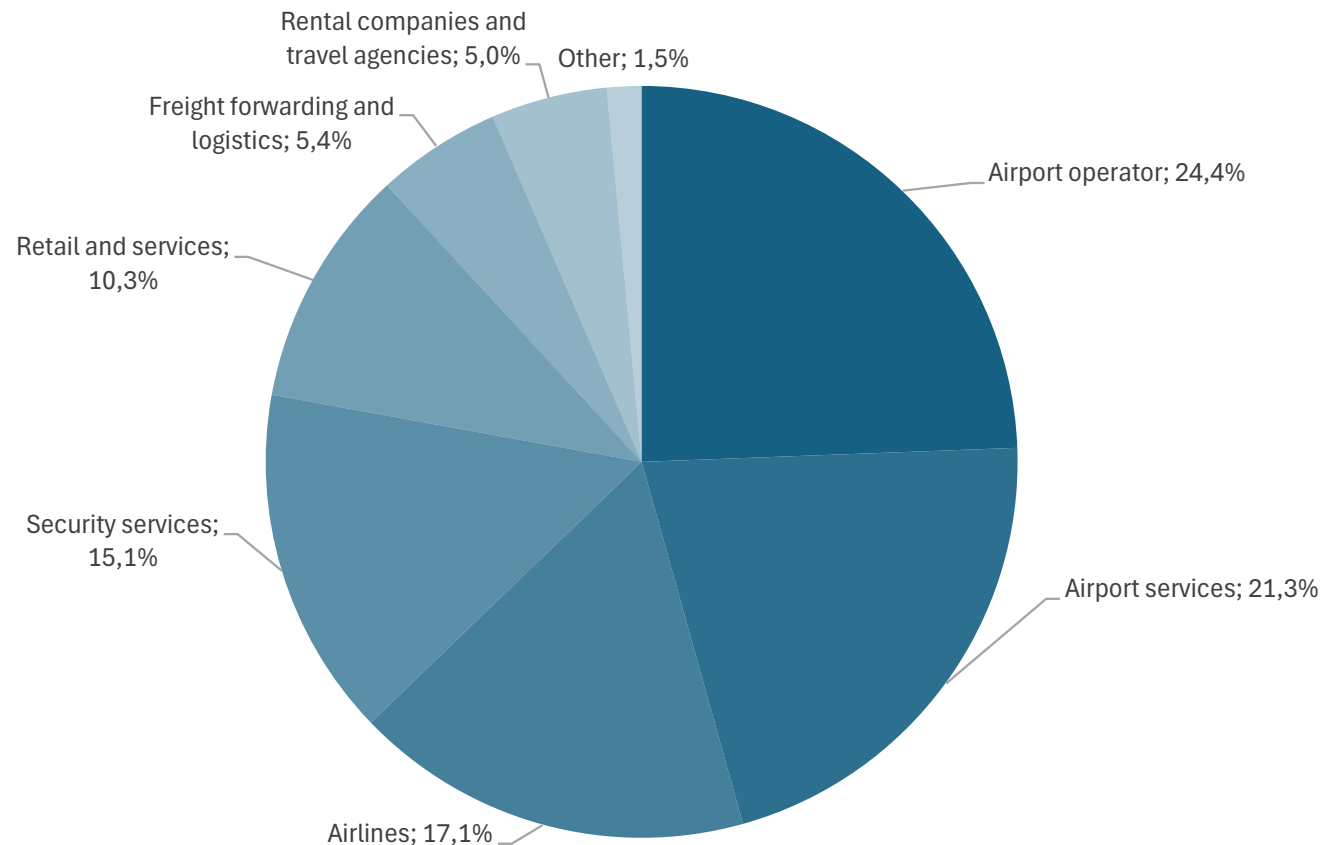


Figure 10. Structure of direct employment at Poznań Airport in 2024



Taking into account the number of people employed and the average added value generated per employee, taking into account the type of activity and voivodeship (GUS, 2025), the added value generated by entities operating at and within the airport was calculated.

The direct impact, measured by the added value generated by Poznań Airport and entities associated with it, amounted to PLN 396 million in 2024.

More than half of this amount (approx. 71%) comes from entities operating at the airport. This is an important observation, as it indicates that the airport ecosystem extends far beyond the activities of the airport operator itself.

Table 7. . Direct impact – income effect in 2024

Entities	Added value (PLN)
Airport	115 575 240
Other entities	280 374 090
Total	395 949 330

Table 8. Direct impact – employment effect in 2024

Entities	Employment (FTE)
Airport (operator)	410
Other entities	1 270
Total	1 680



Alicja Wójcik-Gołębiowska, Head of Communications, CEE & Baltics, Ryanair

Each based aircraft represents an investment of approximately USD 100 million and 30 direct jobs – so in the case of the Poznań operational base, we are talking about an investment of USD 500 million and 150 direct jobs in 2025. These are just the figures associated with based aircraft. If we take into account the number of routes, passenger service, crews and the impact on the local market, we are talking about supporting over 1,500 jobs in the region in 2025 alone.

As an airline, we have an ambitious plan to increase our total passenger numbers to 300 million per year by 2034. Poznań and Poland are an important part of this growth, and we expect Poznań to also benefit from an increasing number of routes and increased tourist traffic.

Indirect impact in 2024

The indirect impact includes all expenditure on goods and services that the airport operator and entities operating at the airport purchase in connection with their core activities. This means purchases made from both local and national suppliers, which trigger further production in the economy. The increase in demand for goods and services causes external companies to increase employment and generate additional added value, which is an important element of the multiplier effect of the airport.

However, not all entities operating at the airport are included in the calculation of the indirect impact. Some of them conduct activities that do not generate significant orders for goods and services, such as currency exchange offices or vending machines. These entities generate small, standardised and often centralised deliveries that do not translate into a significant increase in production or employment outside the airport. Therefore, only those activities that actually generate noticeable purchases and contracts with suppliers, such as catering, shops, handling agencies, freight forwarders, cargo handling or technical services, are included in the indirect impact, as they contri-

bute significantly to the growth of production and employment outside the airport.

Entities operating within the airport area and premises have been divided into three groups. The first group consists of entities that generate an indirect effect and provide key airport operational functions necessary to ensure the continuity of air traffic, other aviation-related entities, as well as entities conducting commercial activities unrelated to aviation. The second group consists of entities that contribute to the airport ecosystem, but whose activities are based on simple, low-cost processes and limited purchases of materials or services. In their case, the indirect effects are small, as the scale and structure of their activities do not require extensive supply chains. The third group consists of entities that are subject to individual assessment, as their activities partially support the operational functions of the airport. These include, for example, public services and administration, as well as leasing companies.

Of the 98 entities operating at and within the airport, all entities supporting airport operations, airlines and those entities whose activities are related to aviation, as well as selected entities conducting commercial activities unrelated to

aviation, whose operations actually involve a significant number of suppliers.

Selected entities that are directly related to activity on the air transport market through the purchase of products and services from suppliers contribute to the generation of added value (**indirect income effect**) and job creation (**indirect employment effect**).

The stimulation of production in the supply chain of products and services to entities directly related to air transport was calculated as the sum of expenditure on external products and services and the cost of investments made by entities directly related to aviation activities.

Data on the costs and investments of the airport were obtained from the financial statements. Other entities were divided according to the type of activity and the number of employees. These entities were assigned appropriate average values for material and energy consumption, expenditure on external services and total expenditure on fixed assets in accordance with data on the financial results of non-financial enterprises provided by GUS (2025g).

Table 9. Production generated by suppliers in 2024 by entities directly related to the operation of the airport (in PLN)

Airport	
Expenditure on external products and services	53 425 110
Expenditure on fixed assets	23 029 210
Entities related to the airport	
Consumption of materials and energy	180 946 967
External services	330 100 195
Total expenditure on fixed assets	503 285 262
Total	1 090 786 744

In 2024, entities whose activities are directly related to the operation of Poznan Airport stimulated production worth over PLN 1,09 billion in the supply chain of products and services.

The value of production stimulated by direct suppliers to the airport is not treated as an end

result, but as a demand stimulus for the entire economy. In the first step, the generated production was assigned to the relevant sectors of the economy (e.g. transport, trade, business services, energy), in accordance with the profile of the suppliers' activities. Then, using inter-industry flow tables, an analysis was made of what additional purchases of goods and services must be made in other sectors to satisfy this initial demand. Inter-industry flow tables show the extent to which each branch uses the products of other branches as inputs for its own production. On this basis, production multipliers are applied, which reflect the cumulative effect of successive rounds of purchases in the economy. This means that the initial expenditure of the airport and companies operating at the airport triggers not only production by direct suppliers, but also further production by the suppliers of those suppliers.

Assuming average labour productivity in industry, measured by production sold per employee by section and division, it can be estimated **that the induced production is associated with 1 243 FTE. This is the effect of indirect employment.**

Assuming the average value added per employee according to GUS estimates, **the indirect income effect can be estimated at almost PLN 275 million.**

In addition, in order to capture the full multiplier effects resulting from production linkages between economic sectors, input-output tables were used in the analysis. This made it possible to identify the scale of induced production among suppliers and to consistently estimate the indirect effects resulting from the demand of the airport and related entities for goods and services in other sectors of the economy.

Table 10. Indirect impact of Poznan Airport in 2024

Stimulated production among suppliers	1 090 786 744 PLN
Employment	1 243 FTE
Added value	274 583 486 PLN



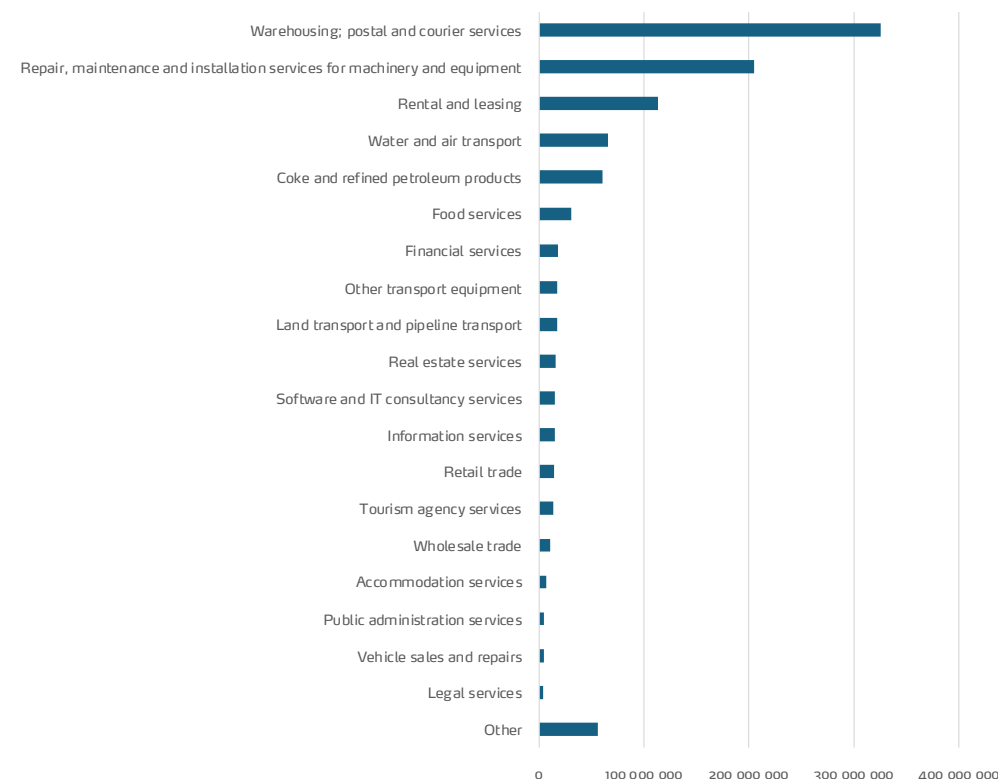
Key industries related to the operation of Poznan Airport in 2024

Key industries related to the operation of Poznan Airport are those sectors of the economy whose activities are directly dependent on the airport's activity. Key industries were identified using inter-industry flow tables published by GUS (2024c). This made it possible to determine which sectors of the economy benefit from the airport's operations through significant purchases from suppliers. To what extent does the air transport sector engage the resources of the local economy and what are the links between different industries? Identifying key industries allows for a more accurate analysis of the economic impact of the airport, indicating which sectors benefit most from its operation and in which areas the development of the airport can generate significant multiplier effects.

The analysis of key industries is based on the input-output table for domestic production, which allows for the identification of indirect effects generated by air transport exclusively within the domestic economy, excluding the impact of imports.

Based on the value of the indirect effect that reaches a given industry, a ranking of key industries benefiting from activity in the air transport market was created. The results indicate that the impact of the airport extends beyond the transport sector, affecting a wide range of service and manufacturing industries, which strengthens its role as an element of the region's economic development infrastructure.

Figure 11. Key industries related to the operation of Poznan Airport in 2024



The results clearly show that the indirect effects of air transport are strongly concentrated in the service sectors and technical and logistical support, rather than in traditional industrial production. **The biggest beneficiaries of activity in the air transport market are warehousing, postal and courier services, confirming the key role of air transport in the integration of supply chains and high-value logistics.** Machinery repair, maintenance and installation services, as well as rental and leasing, are also very important, reflecting the capital-intensive and technically complex nature of the aviation sector.

High values for petroleum refining products, land transport and other transport equipment reflect the energy and infrastructure intensity of aviation. At the same time, the presence of tourism, accommodation, catering, trade, financial and IT services shows that the indirect impact of aviation spreads widely across the market services sector, reinforcing its role as a catalyst for economic activity, not just the transport sector.

Induced impact in 2024

The induced impact of an airport arises from the expenditure of people employed in entities ope-

rating directly at the airport and in entities indirectly related to its activities, e.g. suppliers of services and products used by the airport. The disposable income of these employees, after deduction of social security contributions and income tax, is partly spent on the consumption of goods and services in the economy, generating demand multiplier effects. The calculations of the induced impact use average consumption expenditure structures from statistical data (GUS, 2025h). However, it should be remembered that not all expenditure generates a local effect – some purchases may relate to imports or take place outside the airport region, which limits the actual effect on the local economy. It is worth noting that savings are not directly included in the induced impact, as they do not immediately translate into consumption.

The demand reported by the expenditure of persons employed in the enterprise and by suppliers of products and services to the enterprise constitutes the production volume of the induced impact, which amounts to almost PLN 733 million. **Based on the production volume and productivity indicators, the gross value added is calculated – the induced impact amounted to PLN 185 million and the employment effect to 836 FTE.** However, it should be emphasised that this is an estimated effect, sensitive to the

assumptions made regarding the structure of consumption and the scope of spatial impact.

Table 11. Induced impact of Poznan Airport in 2024

Production	733 172 000 PLN
Employment	836 FTE
Added value	184 561 212 PLN

Total impact in 2024

The total economic impact of the airport on the socio-economic environment includes direct, indirect and induced effects.

Table 12. Total impact of Poznan Airport in 2024 – income effect (in PLN)

Direct impact	395 949 330
Indirect impact	274 583 486
Induced impact	184 561 212
Total impact	855 094 028
Total impact per passenger	237



Table 13. Total impact of Poznan Airport in 2024 – employment effect (FTE)

Direct impact	1 680
Indirect impact	1 243
Induced impact	836
Total impact	3 759

In 2024, Poznan Airport generated a total income effect of PLN 855 million, which includes direct, indirect and induced effects. The largest part is the direct effect, amounting to PLN 396 million and resulting from the airport's own activities, including job creation and income generation. The indirect impact, i.e. the results of the operations of the supplier and subcontractor sector, reached PLN 275 million, while the induced impact, resulting from the expenditure of airport employees and related companies, amounted to PLN 185 million.

The total economic impact per passenger amounted to PLN 237, which illustrates the scale of the income effect generated by each passenger served. The structure of the impact (dominance of the direct effect, significant indirect share and smaller induced share)

corresponds to the typical dynamics of income flows within a regional airport.

The airport's share in the GDP of the city of Poznań is approximately 1,2%. The results obtained are similar to the estimates presented in the SEO report (2024), which calculated that Polish airports contribute to generating 1% of the country's GDP. The higher share in Poznań is primarily due to the fact that the city's economy is diversified and based on many sectors directly linked to air transport, which naturally increases the relative contribution of air transport to the city's GDP.

Catalytic impact in 2024

In addition to generating employment and added value through the direct, indirect and induced activities of the airport, there are also long-term catalytic effects related, among other things, to the inflow of investment, tourist traffic and the impact on the location decisions of enterprises.

The catalytic effect of Poznan Airport refers to the added value generated in the economy of the city and the region thanks to the expenditure of foreign tourists arriving by air to the city and the

region and is linked to the inflow of investment and its impact on companies' location decisions.

Air transport enables tourist travel and thus generates a stream of expenditure that flows into sectors not directly related to airport operations, such as hotels, restaurants, local transport, retail and leisure services. Similar to the approach used in international airport impact studies (SEO, 2024), this value can be converted into employment by referring to the average labour productivity in sectors closely related to tourism.

That aspect of the catalytic effect - which encompasses mechanisms that stimulate the inflow of investment capital and shape firms' location preferences, leading to lasting changes in the region's economic structure - was calculated by taking into account the value of investment and business activity in the region.

As with the other categories of economic impact, the catalysed impact has been estimated in gross terms. This means that the analysis does not take into account the expenditure of Poznań and region residents incurred in other places to which they travel by air, nor potential substitution effects.



The analysis of the catalysed impact only takes into account tourist traffic related to the city of Poznań, assuming that foreign tourists arriving in the Wielkopolska region concentrate their activities mainly in the city.

In 2024, the number of foreign tourists in Poznań was 323,207 (Badam, 2024f). In addition, it was assumed that a similar number of foreign tourists visit Wielkopolska. The average expenditure incurred by a tourist in connection with a trip to Poland amounted to PLN 1,864 (GUS, 2025i). Part of these expenditures is attributable to tourists for whom air transport was the primary means of reaching Poznań. As there are no direct regional statistics in this regard, the share of foreign air tourists in total foreign tourists was assumed to be 60%. To estimate the added value, it was assumed that approximately 50% of tourist expenditure is converted into gross value added, which corresponds to the ratios observed in tourism-intensive sectors according to the OECD and UNWTO tourism satellite accounts. Next, in order to take into account inter-industry linkages and induced effects, an inter-industry flow table (GUS, 2024c) was used, which reflects the spread of demand impulses in the economy. Catalysed employment was estimated by relating value added to average labour productivity in tourism-intensive sectors, assuming a level of approximately PLN 130,000 of value added per job (FTE). Tourism sectors (hotels, catering, recreational services) are characterised by lower productivity than other sectors of the economy.



Jan Mazurczak, President of the Management Board,
Poznań Tourism Organisation

The sectors of the local economy that benefit most from airports are usually hotels, catering, local transport, tourist attractions, culture, event organisers, guides and the MICE sector. The multiplier effects generated by air tourism include new jobs, the development of high-quality services, a larger scale of cultural and business events, and greater attractiveness of the city for investors. Air connectivity acts as a catalyst not only for tourism but also for the entire image of the city.

For example, connections with the British Isles (a dozen or so airports) are driving growing cultural and gastronomic tourism from this area. Copenhagen and other Scandinavian destinations attract high-spending visitors interested in nature, culture and premium offerings. Milan and southern Europe have significantly strengthened the weekend and lifestyle segment. Dubai is also of particular importance, as it has opened Poznań to the Gulf markets – visitors who travel mainly in the summer, often with their families, interested in nature, cooler climates and combined stays: city and region. Each new route is, in practice, a new market to reintroduce Poznań – in a different language, with a different narrative and a different tourist product.



Foreign tourists who arrived in Poznań by air spent approximately PLN 671 million in 2024. These expenditures generated approximately PLN 436 million in added value and created 3,355 jobs. The catalytic impact (including tourism) generated PLN 1.31 billion and 5,925 jobs.

Table 14. Catalytic impact of Poznan Airport in 2024

Employment	5 925 FTE
Added value	1 308 216 000 PLN



Alicja Wójcik-Gołębiowska, Head of Comms,
CEE & Baltics, Ryanair

Airports that establish long-term cooperation with Ryanair can see benefits on many levels: thanks to increased offerings and new routes, awareness of the region grows, which translates into tourist traffic. At the same time, the airport gains a lot of knowledge and experience in cooperation with an airline such as Ryanair, which increases its attractiveness as a partner for other airlines. Low-cost carriers are often treated as a kind of litmus test, and after their success in a given region, other carriers are more open to talks.

Fiscal effect in 2024

The fiscal effects show the airport’s contribution to public finances through taxes and contributions, including CIT on the airport operator’s profits, PIT on employees’ salaries, social security costs and local taxes, e.g. on real estate. They were calculated on the basis of the airport operator’s report for 2024.

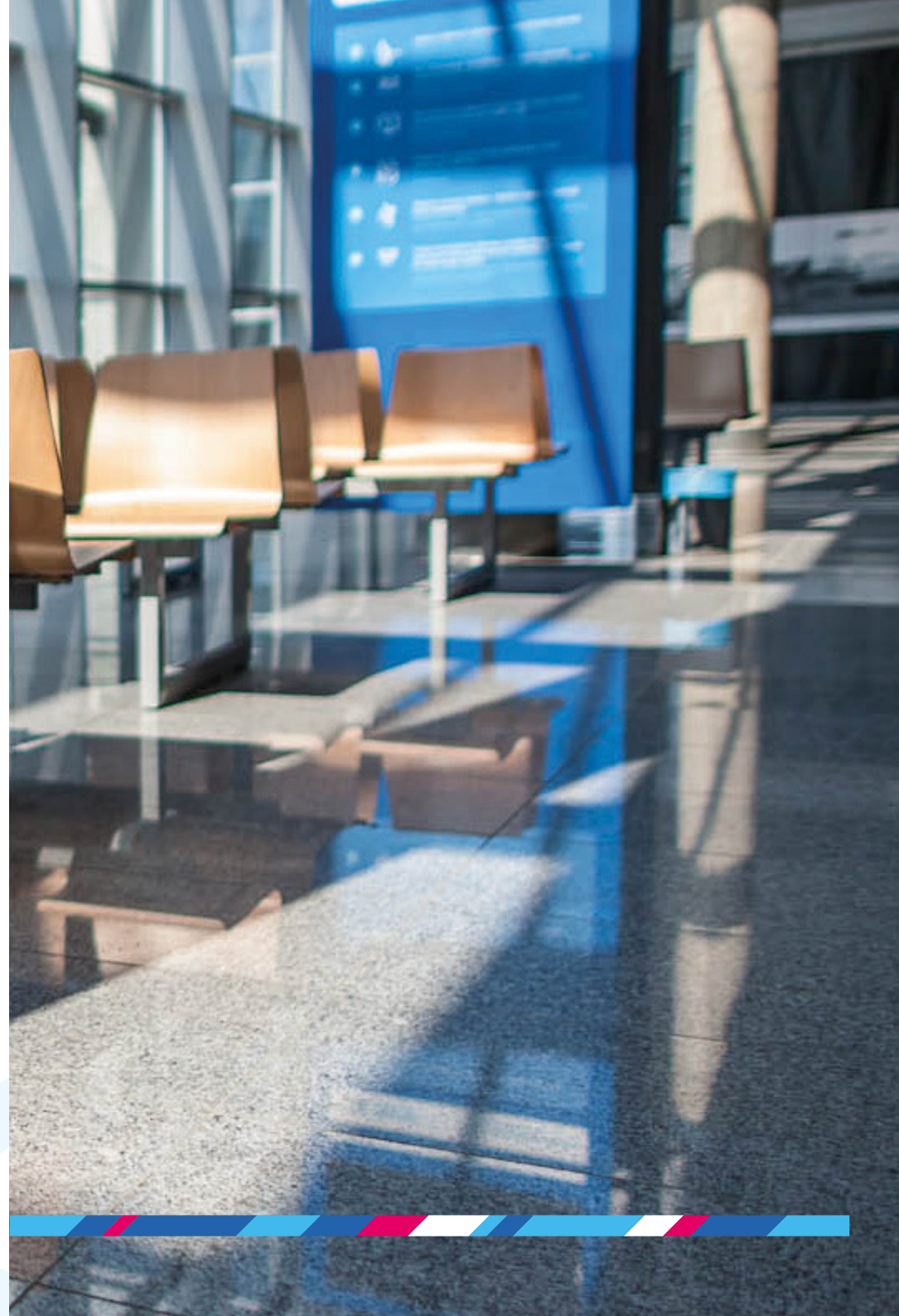
The total fiscal effect of the airport amounted to PLN 23 million, with social security costs accounting for the largest share (almost PLN 11 million).

Table 15. Fiscal impact of Poznan Airport in 2024 (PLN))

Income tax (CIT)	4 344 609
Income tax (PIT)	4 938 365
Taxes and other charges	2 891 100
Social security costs	10 886 090
Total	23 060 164



Historical impact of Poznan Airport in 2015 and impact forecasts for 2025, 2032 and 2035



Historical impact of Poznan Airport in 2015 and impact forecasts for 2025, 2032 and 2035

usually for one year. This method does not take into account changes over time or dynamic effects, but is based on the structure of the economy at a given moment. Nevertheless, based on historical data, it is possible to forecast future effects, taking into account the problem of uncertainty and the possibility of changes in other factors affecting employment and production levels.

The analysis presents the historical impact of the Airport in 2015 and scenarios for the projected impact in 2025, 2032 and 2035, using the same input-output method and the same methodological assumptions as for calculating the impact in 2024. The year 2015 is the reference point and is based on available historical data, while 2025 is treated as a short-term forecast, prepared on the basis of projected data, supplemented with available quarterly data, which reduces the level of uncertainty of the results.

The forecasts for 2032 and 2035 are long-term and subject to a higher risk of error, which is why they have been developed in the form of forecast scenarios (low, base and high variants, in accordance with the ULC nomenclature). The year 2032 is based on current strategic documents and long-term plans, while the year 2035 allows for a 10-year comparison horizon (2015-2025-2035). The scenarios are based on available industry forecasts (ULC, ACI, IATA, GUS, OECD), forecasts by Poznan Airport and local development conditions, and the passenger and cargo traffic volumes assigned to them have been translated (using the input-output method) into economic effects in the form of impact on added value and employment.



Impact of Poznan Airport in 2015 – reference point

The reference point for analysing the economic impact of Poznan Airport on its surroundings is 2015. This is justified because it was a period of relative stability in the aviation market, and the available data allow for the consistent application of the input-output method. In addition, measuring the impact from a decade ago provides a baseline for assessing long-term changes in the airport's impact on its surroundings.

Direct impact in 2015

According to the adopted method, the direct impact is the employment and income generated by the airport operator and entities located on and within the airport premises.

In 2015, Poznan Airport employed 323 people (full-time equivalent). There were 78 entities operating on the airport premises and within the airport, employing a total of 412 people.

Total direct employment in 2015 amounted to 735 FTE.

Table 16. Entities operating on the airport premises and within the airport in 2015

Category	Number of entities
Airport operations	12
Airlines and aviation-related entities	9
Non-aviation commercial activities	52
Public services and administration	6

In addition to the airport operator, the category of airport operations also includes companies that were responsible for airport services, infrastructure maintenance, cleaning, security and technical services in 2015, such as IMPEL and WELCOME – handling and service companies, and LS TECHNICS – aircraft technical services.

Companies conducting commercial, catering, car rental and passenger services not directly related to airport operations include BALTONA and AELIA – shops, DO&CO and AVIA – catering, RENTIS – car rental, currency exchange offices, restaurants and service points.

The airport operator, together with 78 entities operating at and within the airport, jointly generated PLN 87.9 million in direct added value in 2015. Almost half (PLN 46 million) was generated by entities cooperating with the airport, including handling agents, shops, catering, car rental and other service companies.

The added value per employee of the airport operator amounted to PLN 126,000, which is higher than the average for Poland – PLN 114,000 (GUS, 2016a), which means greater efficiency in the use of resources at the airport compared to other sectors of the economy.

Table 17. Direct impact – income effect in 2015

Entities	Added value (PLN)
Airport (operator)	40 891 740
Other entities	47 089 952
Total	87 981 692

Table 18. Direct impact – employment effect in 2015

Entities	Employment (FTE)
Airport (operator)	323
Other entities	412
Total	735

Indirect impact in 2015

The indirect impact includes expenditure by the airport operator and entities operating on its premises on goods and services necessary for their operations. These purchases, made from local and domestic suppliers, stimulate further production, generating additional employment and added value in the economy.

Table 19. Production stimulated among suppliers in 2015 by entities directly related to the operation of the airport (in PLN)

Airport	
Expenditure on external products and services	16 875 420
Expenditure on fixed assets*	41 751 300
Entities	
Consumption of materials and energy	226 700 866
External services	
Total expenditure on fixed assets	
Total	285 327 586

* Expenditure on fixed assets is given in estimated values due to the lack of complete financial data on the acquisition of fixed assets

Production induced by suppliers includes expenditure incurred by the airport and related entities that generate additional economic activity in sectors supplying products and services to the airport. In the case of the airport, the key source of demand stimulus was operating expenditure, in particular the consumption of raw materials and other costs by type. Capital expenditure was also a significant factor, including the acquisition of fixed assets worth PLN 25 million and fixed assets under construction worth PLN 16 million. The total value of the airport's expenditure generating induced production among suppliers amounted to PLN 58 million.

In addition, other entities operating in the airport's vicinity generated induced production through the consumption of materials and energy, external services and capital expenditure, the total value of which was estimated at PLN 226 million.

The total value of induced production among suppliers reached PLN 285 million, confirming the strong indirect effect of the airport's operations on the regional economy. Assuming an average labour productivity of PLN 543,000 per employee (GUS, 2016a; GUS, 2016b), **the induced production generated corresponded to the demand for 525 FTE. This translated into an indirect added value of nearly PLN 60 million, generated in the sectors of suppliers serving the airport's operations.**

Table 20. Indirect impact of Poznan Airport in 2015

Induced production among suppliers	285 327 586
Employment	525
Added value	59 970 372

Induced impact in 2015

The induced impact results from the consumer spending of employees working at the airport and at entities directly and indirectly related to its operations. Part of the disposable income of employees is spent on consumption, which generates additional demand in the economy. The analysis takes into account average consumption expenditure patterns, bearing in mind that some expenditure is not local in nature and savings do not have a direct induced effect.

Table 21. Induced impact of Poznan Airport in 2015

Production	55 535 608
Employment	102
Added value	11 672 517

The induced effect of Poznan Airport in 2015 translated into production worth PLN 55.5 million, the creation or maintenance of 102 FTE and the generation of added value of PLN 11.7 million. The scale of these effects indicates that the induced impact is a significant, albeit relatively smaller, complement to the direct and indirect impact, reflecting the importance of employee consumption as a channel for the airport's further impact on the economy.

Total impact in 2015

The total economic impact of Poznan Airport in 2015 is illustrated in Table 22. The total employment effect reflects the number of jobs created in the economy as a result of the airport’s operations and those of its affiliates. In turn, the total income effect expresses the gross value added generated both by the direct activity of the airport and by its suppliers, as well as the further multiplier effect on the economy.

Table 22. Total impact of Poznan Airport in 2015 – income effect (in PLN)

Direct impact	87 981 692
Indirect impact	59 970 372
Induced impact	11 672 517
Total impact	159 624 580
Total impact per passenger	106

Table 23. Total impact of Poznan Airport in 2015 – employment effect (FTE)

Direct impact	735
Indirect impact	525
Induced impact	102
Total impact	1362

The structure of the total impact of Poznan Airport in 2015 indicates the dominant role of direct impacts, which generated added value of PLN 88 million, i.e. over half of the total added value generated by the airport’s operations. The indirect impact amounted to almost PLN 60 million, confirming the significant importance of the supply chain and cooperation with external entities. The induced impact, although relatively the smallest (PLN 11.6 million), reflects additional economic activity resulting from employee consumption.

In total, the overall economic impact in 2015 reached PLN 159.6 million, which translates into approximately PLN 106 of added value per passenger served.

A similar structure can be seen in the employment effects. In 2015, the airport's operations contributed to the maintenance of a total of 1,362 FTE in the economy, of which 735 were direct, 525 indirect and 102 induced.



Impact of Poznań Airport in 2025 – short-term forecast

As this report was prepared at the turn of 2025 and 2026 and full data for the whole of 2025 was not yet available at that time, a forecast of the impact of Poznań Airport in 2025 was prepared. The analysis was based on the same approach as in previous years, but the forecasts for individual data included estimates for the airport operator, cooperating entities and the economy as a whole. The expected direct, indirect and induced effects were calculated in terms of the impact of the airport's operation on employment and added value in the region.

Direct impact in 2025

The direct impact is the employment and income generated by the airport operator and entities operating at and within the airport.

In 2025, there were 90 entities operating at Poznań Airport, which can be divided into four main categories (see Table 24). Airport operations included the airport operator and five companies responsible for airport services, maintenance and infrastructure. There were 11 airlines and aviation-related entities, including mainly passenger carriers. Commercial activities not related to aviation were the largest and included 67 entities operating catering,

shops, travel agencies, car rental, currency exchange offices and other services. Public services and administration included six entities responsible for security, rescue and supervision

Tale 24. Entities operating at and within the airport in 2025

Category	Number of entities
Airport operations	6
Airlines and aviation-related entities	11
Non-aviation commercial activities	67
Public services and administration	6

The list of entities operating at Poznań Airport in 2025 is very similar to that of 2024. New entities have appeared, such as LS Technics, which was

not present in 2024 but was operating in 2015.

Based on the number of airport ID cards/badges issued, it can be estimated that employment in 2025 in entities located at Poznań Airport has changed compared to 2024. An increase in the number of airport ID cards/badges was observed in the area of airport operations and trade, with a simultaneous decrease in airport ID cards/badges in the car rental segment and some public services. In 2025, compared to 2024, there was a strong increase (by 16%) in the number of airport ID cards/badges issued to employees of the main handling agent, Welcome, which suggests that the employment structure has been adjusted to the growing scale of passenger and operational traffic. The largest commercial entity is Baltona, which increased its employment at the airport by as much as 90% compared to 2024, indicating a very strong increase in the scale of operations in 2025 (related to the opening of a multistore in a completely new format). An important factor modifying the employment structure is the scale of employment generated by Gwarant.

The airport operator plans to employ 493 people by the end of 2025. Employment in other entities operating at and within the airport was estimated at 1 413 full-time positions. In total, direct employment related to the operation of the airport in 2025 amounted to 1 906 and was significantly higher than in 2024 (1 680). The increase in employment in 2025 was mainly due to the development of key operational, commercial and service functions (airport, handling agents – Welcome, Baltona). This reinforces the conclusion that the airport is increasingly playing the role of a local hub of economic activity.

In 2025, the direct impact of the airport increased significantly compared to 2024. The total added value generated by the airport operator and other entities operating on its premises reached PLN 505 million in 2025. This increase was visible both on the part of the airport operator (from PLN 116 million to PLN 170 million) and other entities (from PLN 280 million to PLN 335 million).

The increase in the direct impact per passenger from PLN 110 in 2024 to PLN 122 in 2025 means that, despite the growing number of passengers, the airport’s operations generated a significantly higher direct income effect per passenger served, which indicates an improvement in the economic

intensity of the airport’s operations.

Table 25. Direct impact – income effect in 2025

Entities	Added value
Airport	170 300 920
Other entities	334 714 955
Total	505 015 876

Table 26. Direct impact – employment effect in 2025

Entities	Employment
Airport (operator)	493
Other entities	1 413
Total	1 906

Indirect impact in 2025

The indirect impact of Poznan Airport in 2025 was estimated based on two complementary approaches: estimates of added value per employee in the airport’s vicinity and a ratio proportional to the direct impact, consistent with the results from previous years. This approach ensures methodological consistency over time and reduces the risk of overestimating multiplier effects.

In 2025, the indirect impact of the airport was associated with the employment of **1 428 FTEs** and the generation of **PLN 338 million in added value**. Compared to 2024, this represents a significant increase in both employment and added value in the airport’s supplier environment. The scale of this growth is consistent with the observed increase in the direct impact of the airport and the dynamic development of operational and service activities in its environment.

The results confirm that, as the airport develops, the importance of economic links with local and regional suppliers is growing, and the indirect effect is becoming an increasingly important component of the total economic impact of Poznan Airport.

Table 27. Indirect impact of Poznan Airport in 2025

Employment (FTE)	1 428
Added value (PLN)	338 360 637



Induced impact in 2025

The induced impact results from the consumer spending of employees working at the airport and in entities directly and indirectly related to it. Part of their income is spent on consumption, which creates additional demand in the economy. The analysis takes into account average expenditure patterns, assuming that not all expenditure is local and that savings do not generate an induced effect.

Table 28. Induced impact of Poznan Airport in 2025

Production	920 420 091
Employment (FTE)	1 049
Added value (PLN)	248 610 491

The induced impact of Poznan Airport in 2025 is a significant addition to the direct and indirect effects. The consumer spending of employees working at the airport and in related entities generated production worth approximately **PLN 250.6 million, 1 049 FTE and PLN 249 million in added value.**

Compared to 2024, the induced impact of Poznan Airport in 2025 has increased significantly.

The value of production increased from PLN 733 million to PLN 920,4 million, employment from 836 to 1 049 FTEs, and added value from PLN 185 million to PLN 249 million. Such strong growth dynamics reflect an increase in employment and income in sectors directly and indirectly related to the airport's operations, which translated into higher consumer spending and a stronger demand effect in the economy.

The large increase in the induced effect was mainly due to a significant increase in employment in entities directly related to the aviation market. Between 2024 and 2025, direct employment increased by 226 FTEs and indirect employment by 205 FTEs. This significantly increased the total income from which the induced effect is calculated. Employees' disposable income increased, which translates into greater consumption potential. In addition, in 2025, the airport operated on a much larger scale, which fostered stronger links with the local economy and a greater share of consumer spending in the region.

Total impact in 2025

In 2025, the total economic impact of Poznan Airport increased significantly compared to 2024,

both in terms of revenue and employment. **The total revenue effect increased to PLN 1,09 billion, which represents an increase of approximately 28%.** This increase was visible in all components of the impact, with the direct and induced impact increasing the most, reflecting the dynamic growth in employment and income.

A similar trend is visible in **the employment effect.** The total number of jobs related to the airport's operations increased **to 4 383 FTE in 2025, i.e. by approx. 17%.** The data confirms the airport's growing role as a source of jobs, not only within the airport infrastructure itself, but also in the wider local economy.

At the same time, **the total impact per passenger increased from PLN 237 in 2024 to PLN 263 in 2025,** indicating an increase in the economic impact of the airport, despite the growing number of passengers served.

Overall, these results indicate that in 2025, Poznan Airport significantly strengthened its role as a driver of economic development in the region, both through the creation of added value and through its impact on the labour market.

The significant increase in the total impact in 2025 is mainly due to the increase in employment in key airport entities and the growing productivity of employees measured by added value per employee.

Table 29. Total impact of Poznan Airport in 2025 – income effect (in PLN)

Direct impact	505 015 876
Indirect impact	338 360 6376
Induced impact	248 610 491
Total impact	1 091 987 004
Total impact per passenger	263

Table 30. Total impact of Poznan Airport in 2025 – employment effect (in FTE)

Direct impact	1 906
Indirect impact	1 428
Induced impact	1 049
Total impact	4 383

Catalytic impact in 2025

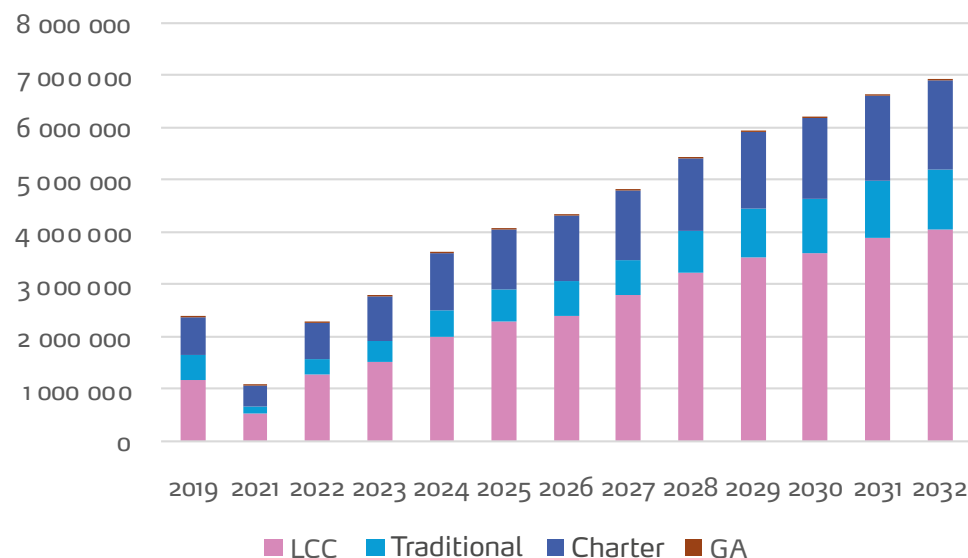
In addition, the **catalytic impact** has been calculated. The value added amounted to approximately **PLN 1.81 billion**, and employment stood at **7,620 FTEs**. This represents an increase of 38% and 29% respectively compared with the previous year.



Long-term forecast of the economic impact of Poznan Airport – assumptions

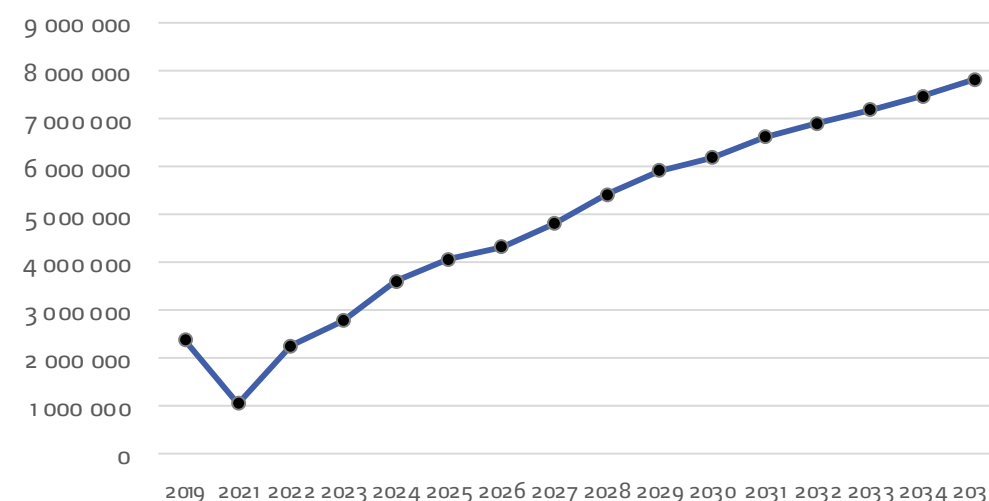
The long-term forecast of the economic impact of Poznan Airport is based on development scenarios, historical data and plans for passenger traffic and employment.

Figure 12. Forecast of passenger numbers at Poznan Airport until 2032



Source: Poznan Airport

Figure 13. Forecast of passenger numbers at Poznan Airport until 2035



Source: Own study based on data from Poznan Airport

The projected number of passengers until 2032 was prepared by Poznan Airport. The passenger forecast until 2035 was prepared based on this data, taking into account the dynamics of air traffic in the region. The growth rate for the LCC, traditional and charter segments was calculated based on the average annual growth. The GA segment, on the other hand, was assumed to be stable, with an expected growth of 1-1.5% per annum. The forecast does not take into account sudden market events or possible changes in aviation regulations.

The employment forecast for Poznan Airport and related entities reflects operational development and infrastructure investments.

Table 31. Employment at Poznan Airport and other entities

Year	Airport operator	Other entities	Total
2015	323	412	735
2024	410	1 270	1 680
2025	493	1 413	1 906
2032	750*	2 375*	3 125*
2035	860*	2 723*	3 583*

*forecast

The employment forecast for Poznan Airport and its affiliated entities was prepared based on historical employment data, the dynamics of the number of entities operating at the airport, and assumptions regarding the growth of operational and service activities. In the case of the airport operator, a gradual increase in employment is expected as a result of infrastructure development and the handling of growing passenger traffic, with a simultaneous gradual reduction in the operator’s share of total airport employment. Employment in other entities is increasing in proportion to the number of companies and the anticipated expansion of commercial, service and passenger handling activities. Average employment per entity is assumed to be a growing value, reflecting both the development of existing companies and the emergence of new entities. The forecast also assumes a gradual increase in the number of entities operating at the airport, taking into account possible consolidation in the sector, with

the rate of growth in the number of entities being slower than the growth in employment. This forecast allows for an assessment of both total employment at the airport and the structure of employment between the operator and other entities, which is important when analysing the long-term economic impact of the airport.

The forecast takes into account the effect of scale, i.e. once a certain terminal and infrastructure capacity has been reached, further growth in passenger numbers requires proportionally fewer new employees. Even large infrastructure investments do not automatically translate into significant employment growth due to the increasing productivity of employees and their high operational efficiency. In addition, the reduction in the demand for new jobs is supported by the automation of passenger and baggage handling processes, the implementation of traffic management systems and the possibility of outsourcing selected functions. As a result, despite the expansion of infrastructure, employment growth at the airport is moderate and is growing more slowly than the number of passengers.



The added value generated by Poznań Airport and its affiliates has been estimated in three scenarios that reflect different rates of business growth. **The low scenario** assumes an annual increase in added value of **3.2%**, which corresponds to moderate growth with stable operating activity and limited investment. **The base scenario** assumes an annual growth of **5.4%** and reflects realistic dynamics resulting from the projected number of passengers, infrastructure development and service expansion. **The high scenario** assumes an annual increase in added value of **7.3%**, taking into account faster expansion of the airport, greater operational efficiency and potential growth in the activity of related entities. This approach allows for an assessment of the economic impact of the airport in pessimistic, moderate and optimistic scenarios and an analysis of the sensitivity of economic effects to the pace of development.

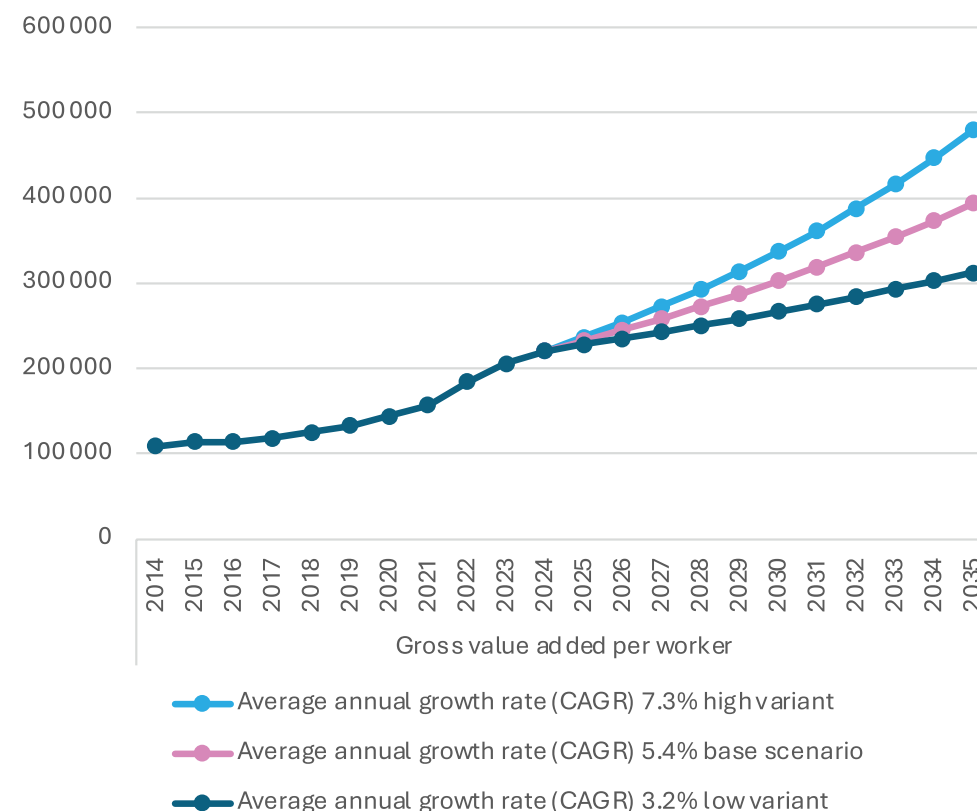


Figure 14. Forecast of added value growth in three variants (in PLN)

Own study based on (GUS, 2025j)

Impact of Poznan Airport in 2032 – long-term forecast

The forecast of the long-term economic impact of Poznan Airport in 2032 is based on the projected number of passengers, projected employment at the airport and entities related to its operation, and three scenarios for the growth of generated added value. The forecast takes into account both the direct impact resulting from the airport's operational activities and the indirect and induced impact related to the functioning of entities in the airport's environment and the consumption expenditure of employees. Three growth scenarios were adopted for the assessment of added value: low (3.2% per annum), base (5.4%) and high (7.3%), which allows for different variants of infrastructure development and airport operations to be taken into account. .

- **The low scenario (3.2%)** corresponds to a conservative variant, taking into account economic slowdown, unfavourable external conditions (e.g. financial crises, restrictions on trade or tourism) or regional stagnation. This value is close to the lowest annual increases in added value in Poland in the last decade, thus providing a realistic assessment of the minimum effects.
- **Base scenario (5.4%)** – reflects the average historical economic growth trend, based on data from GUS for Poland in recent years. This is a moderate, realistic and most likely scenario, which serves as a reference point for assessing the impact of air transport.
- **High scenario (7.3%)** – represents an optimistic development scenario, with accelerated economic expansion, high investment inflows and growth in tourism expenditure. This value corresponds to higher

forecasts for GDP growth and added value in conditions favourable to air transport and the region.

The scenario approach takes into account the uncertainty of future growth in value added and shows the sensitivity of forecasts of the impact of air transport on the environment. It also enables an assessment of the airport's total economic impact in the long term, including its effectiveness in generating jobs, added value and impact on the local economy, as well as an analysis of the sensitivity of the results to the growth rate of individual airport activity parameters.

Direct impact in 2032

The forecast of the direct impact in 2032 shows a clear range of values depending on the assumed economic growth and labour productivity scenario. **In the low scenario, the total added value is almost PLN 887 million, while in the base and high scenarios, these values increase to PLN 1,05 billion and PLN 1,2 billion, respectively.** It can be seen that entities operating at and within the airport generate a greater impact, but the increase in the added value of the airport operator also significantly increases the economic effect, which shows the sensitivity of the direct impact on labour efficiency and airport development.



Table 32. Direct impact – income effect in 2032 (in PLN)

Added value	Low scenario	Base scenario	High scenario
Airport (operator)	213 026 189	252 185 613	290 932 523
Other entities	674 582 932	798 587 774	921 286 321
Total	887 609 120	1 050 773 387	1 212 218 844

The employment forecast is based on a single scenario, as changes in employment in the scenarios are insignificant compared to the impact of added value. **Total direct employment in 2032 at Poznań Airport and related entities is forecast at 3 125 FTE**, of which 750 are accounted for by the airport operator and 2 375 by other entities operating in its vicinity.

Table 33. Direct impact – employment effect in 2032 (in FTE)

Entities	Employment
Airport (operator)	750
Other entities	2 375
Total	3 125

Indirect impact in 2032

The indirect impact, i.e. production generated by suppliers of products and services to entities directly related to the operation of the airport in 2032, increases with the increase in added value in the scenarios – **from PLN 577 million in the low variant to PLN 788 million in the high variant**. Indirect employment amounts to 2 371 FTE, which is a significant contribution by entities related to the functioning of the air transport market to job creation and added value in the region's economy.

Table 34. Indirect impact of Poznań Airport in 2032 (in PLN and FTE)

	Low scenario	Base scenario	High scenario
Added value	576 945 928	683 002 701	787 942 249
Employment			2 031

Impact induced in 2032

The impact induced in 2032, resulting from consumer spending by employees directly and indirectly related to the airport's operations, increases in line with the adopted development scenario. **The added value ranges from approximately PLN 374 million in the low scenario to over PLN 511 million in the high scenario**, with induced employment at 1 371 FTE. This shows the significant importance of demand effects for the total economic impact of the airport on the region's economy.

Table 35. Induced impact of Poznan Airport in 2032
(in PLN and FTE)

	Low scenario	Base scenario	High scenario
Added value	374 223 697	443 015 165	511 081 969
Employment	1317		

Tabela 36. Total impact of Poznan Airport in 2032 (in PLN)

	Low scenario	Base scenario	High scenario
Direct impact	887 609 120	1 050 773 387	1 212 218 844
Indirect impact	576 945 928	683 002 701	787 942 249
Induced impact	374 223 697	443 015 165	511 081 969
Total impact	1 838 778 746	2 176 791 254	2 511 243 062

Total impact in 2032

The forecast for 2032 indicates a very significant economic impact of Poznan Airport in all analysed scenarios. **In the low variant, the total impact reaches PLN 1,84 billion, in the base scenario it is approximately PLN 2,17 billion, while in the high scenario it reaches nearly PLN 2,51 billion.** In all variants, the direct impact accounts for the largest share, but the indirect and induced impact is also significant, confirming the airport's strong links with the region's economy. The variation in results between scenarios shows the sensitivity of the total impact to the rate of growth in added value, while also indicating that even in the conservative scenario, the airport remains an important generator of income and economic activity in the long term.

Table 37. Total impact of Poznan Airport in 2032 – employment effect (FTE)

Direct impact	3 125
Indirect impact	2 031
Induced impact	1 317
Total impact	6 473



Impact of Poznan Airport in 2035 – long-term forecast

As in 2032, the long-term economic impact forecast for Poznan Airport in 2035 was broken down into direct, indirect and induced impact. For this purpose, the forecast number of passengers, the forecast employment at the airport and entities related to its operation, and three scenarios of added value growth were used: low (3.2% per annum), base (5.4%) and high (7.3%).

Direct impact in 2035

The forecast of direct impact in 2035 indicates a further increase in the economic importance of Poznan Airport in all analysed scenarios.

The total value of direct impact in 2035 ranges from approximately **PLN 1,12 billion in the low scenario** to approximately **PLN 1,72 billion in the high scenario**. At the same time, direct employment in 2035 reaches **3 583 FTE**, of which 860 are accounted for by the airport operator and 2 723 by other entities.

Table 38. Direct impact – income effect in 2035 (in PLN)

Added value	Low scenario	Base scenario	High scenario
Airport	268 478 355	338 594 054	412 124 683
Other entities	850 077 395	1 072 083 266	1 304 901 759
Total	1 118 555 749	1 410 677 319	1 717 026 442

Table 39. Direct impact – employment effect in 2035 (in FTE)

Product	Employment
Airport (operator)	860
Other entities	2 723
Total	3 583

Indirect impact in 2035

In 2035, the indirect impact of Poznan Airport remains a significant element of the total economic impact, reaching an added value of approximately **PLN 716 million in the low scenario** and approximately **PLN 1 099 million in the high scenario**. Indirect employment at the level of **2 293 FTE** confirms the airport's strong links with suppliers and cooperating entities in the regional economy.



Table 40. Indirect impact of Poznan Airport in 2035 (in PLN and FTE)

	Low scenario	Base scenario	High scenario
Added value	715 875 680	902 833 484	1 098 896 923
Employment	2 293		

Impact induced in 2035

The induced impact in 2035, resulting from employee consumption expenditure, is also significant. **The induced impact ranges from approximately PLN 543 million in the low scenario to approximately PLN 833 million in the high scenario, with induced employment amounting to 1 738 full-time jobs.** This means that the demand effects generated by the airport and related entities are an important complement to the direct and indirect impact, strengthening the airport’s impact on the local and regional economy.

Table 41. Induced impact of Poznan Airport in 2035 (in PLN and FTE)

	Low scenario	Base scenario	High scenario
Added value	542 618 959	684 329 109	832 941 140
Employment	1 738		

Total impact in 2035

The projected total impact of Poznan Airport in 2035 confirms its significant role in the regional economy, regardless of the development scenario adopted. **In the low variant, the total economic effect amounts to over PLN 2,38 billion, in the base scenario it reaches PLN 2,99 billion, while in the high variant it exceeds PLN 3,65 billion.** Although the direct impact accounts for the largest part of the impact, indirect and induced effects also play a significant role, which proves the wide range of connections between the airport and its economic environment. The differences between the scenarios indicate that the results are highly sensitive to the pace of economic growth measured by added value, while confirming the long-term importance of the airport as a key driver of economic development in the region.





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Department, Poznań City Hall

Poznań Airport has been included as a key infrastructure element in the Poznań City Development Strategy 2040+. One of the measures of its operationalisation is the high growth rate in the number of passengers served by the airport. The city also indicates a number of key activities to be implemented by 2040, including the construction of a rail link to the airport and the expansion of its infrastructure. As part of the plans for the development of Poznań Airport, space is being reserved in its northern part, and the city's transport network is to provide convenient access to the airport. The revitalisation of the areas along Bukowska Street and the development of accompanying functions will also be of great importance, along with the expansion of transport and parking infrastructure, including for heavy goods vehicles.

In the area of defence and public safety, the Strategy provides for the construction of a railway line connecting Poznań Główny Station with Poznań Airport and then with Tarnowo Podgórne, which will further strengthen the strategic importance of this part of the infrastructure.

Table 42. Total impact of Poznań Airport in 2035 (in PLN and FTE)

	Low scenario	Base scenario	High scenario
Direct impact	1 118 555 749	1 410 677 319	1 717 026 442
Indirect impact	715 875 680	902 833 484	1 098 896 923
Induced impact	542 618 959	684 329 109	832 941 140
Total impact	2 377 050 389	2 997 839 913	3 648 864 505

Table 43. Total impact of Poznań Airport in 2035 – employment effect (FTE)

Direct impact	3 583
Indirect impact	2 293
Induced impact	1 738
Total impact	7 614





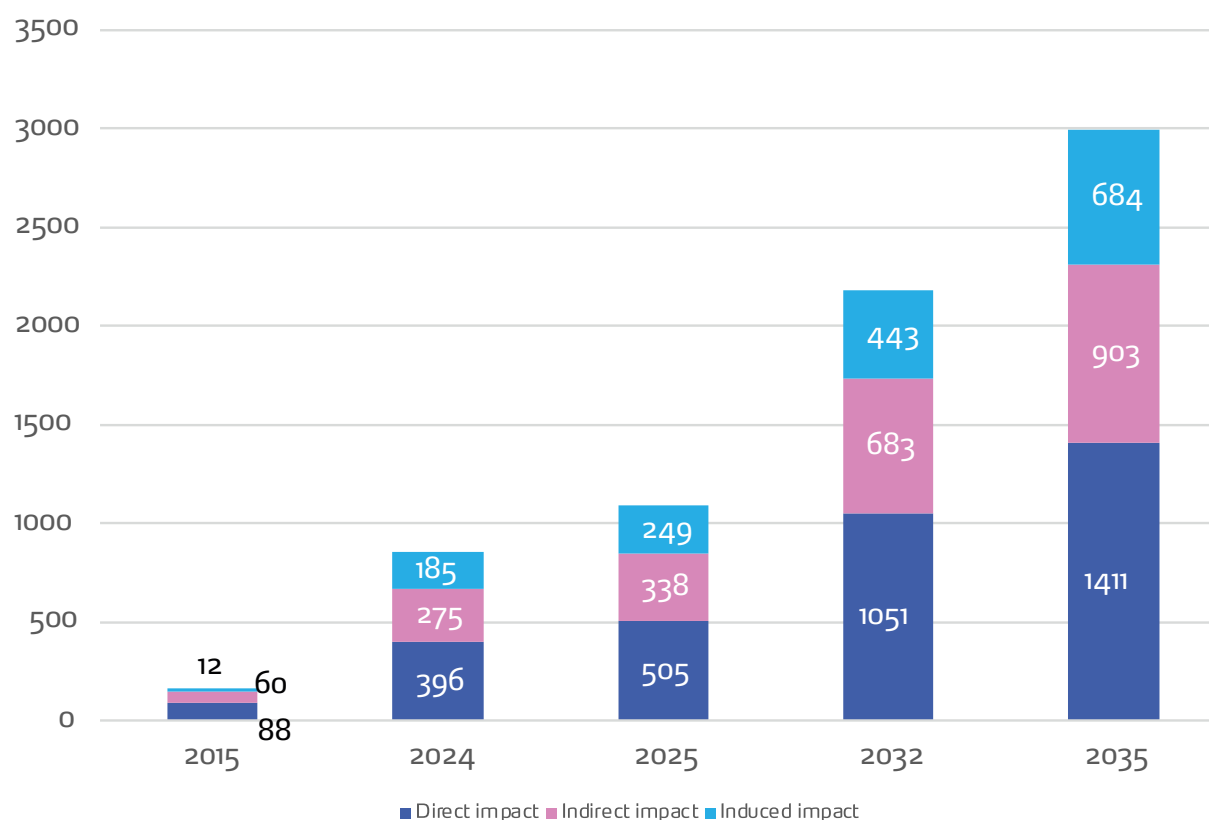
Summary



Summary

An analysis of the results for 2015-2024 and forecasts for 2025, 2032 and 2035 shows a very dynamic increase in the economic importance of Poznań Airport for the economy of the city of Poznań and the Wielkopolska region. The total income effect increased from approximately PLN 160 million in 2015 to PLN 1,09 billion in 2025, and then (according to forecasts) will exceed PLN 1,8 billion in 2032 and reach from PLN 2,37 to over PLN 3,65 billion in 2035, depending on the scenario adopted. This growth is accompanied by an increasing number of passengers, which, after the pandemic slump in 2021, has returned to a path of strong growth and is projected to exceed the threshold of 7 million passengers per year by 2035. At the same time, employment is growing – from 1,362 FTE in 2015 to 4 383 FTE in 2025 and to 7 614 FTE in 2035, confirming the airport's growing role as a job creator.

Figure 15. Economic impact of Poznań Airport in 2015, 2024, 2025, 2032 and 2035 (in PLN million)



*for 2032 and 2035, values for the baseline scenario

The structure of the economic impact of Poznan Airport remains relatively stable over time, with a dominant share of direct impact, but with indirect and induced effects becoming increasingly important. This means that the development of the airport translates not only into the financial results of the airport operator and companies operating on its premises, but also into the broader economic environment of suppliers, the service sector and local household consumption. The increase in induced impact is particularly noticeable, which, together with the increase in wages and employment, is becoming an important channel for transmitting development impulses to the region's economy.

In the long term, there is also an increase in the added value per passenger – from approximately PLN 106 in 2015 to PLN 237 in 2024 and PLN 263 in 2025, followed by a further increase in forecasts to PLN 364 in 2032 and PLN 467 in 2035 in the high variant, which indicates an improvement in the economic efficiency of the airport and related entities.

The economic impact per passenger reflects the traffic structure, the airport's profile and the scope of the method adopted. This impact falls within the realistic ranges observed in studies

of the impact of airports, especially those with a regional profile, which have a large share of low-cost traffic and are characterised by lower airport charges.

In 2024, Poznan Airport generated significant economic effects beyond its operational activities. This catalytic effect translated into added value of PLN 1.31 billion and employment of around 5,925 people in the local economy in 2024. In 2025, these figures stood at PLN 1.81 billion and 7,620 jobs respectively.

At the same time, the results of the economic impact study of Poznan Airport indicate significant lost benefits that may arise if the airport's development is hampered by environmental or infrastructure constraints. Capacity constraints, the inability to expand infrastructure, and operational restrictions may translate not only into slower passenger growth, but also into significantly lower added value, lower employment, and weaker multiplier effects in the regional economy. In practice, this would mean a reduction in potential income and employment growth in the region in the long term, although it should be noted that some of the labour and capital resources could be used in other segments of the economy.

The SCUEP results presented should be interpreted taking into account the limitations of the input-output analysis method. Although widely used in studies of the impact of transport infrastructure, this method focuses on demand effects and is static in nature, based on data from a single base year. It does not take into account the costs of financing investments, potential crowding-out effects or the alternative use of labour and capital resources, and therefore provides information on gross effects.



Additional limitations arise from the availability and quality of data. The comparability of results over time and between studies is also hampered by methodological differences, including different ways of defining indirect and induced effects and the spatial scope of a airport's impact. Furthermore, when comparing results between years, changes in prices and purchasing power should be taken into account – a nominal increase in added value does not always mean a proportional increase in real economic impact.

Finally, a full assessment of the role of Poznan Airport requires a broader view than that offered by the input-output analysis alone. In addition to short-term income and employment effects, it is necessary to take into account long-term structural effects, such as the impact on the investment attractiveness of the region, the location of economic activity or the development of tourism, as well as external costs related to environmental and social impact. Only by comparing the positive and negative effects can a balanced and reliable assessment of the airport's importance in the socio-economic development of the region be made.

The analysis presented in this study covers Poznan Airport and concerns its operational activities in the calendar years 2015 and 2024, as well as forecasts: short-term in 2025 and long-term in 2032 and 2035. The calculations use information including the number of employees, the number of entities, the number of passes and the company's financial data for 2015, 2024 and 2025. In addition, publications by Statistics Poland (listed in the Literature section) were used. Poznan Airport is responsible for the accuracy and completeness of the data provided, which was used in the analysis. The Special Purpose Vehicle of the Poznań University of Economics is responsible for the use and presentation of additional data (from other publications), the method used, the analysis carried out and the results contained in the study.



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POZNAŃ
AIRPORT

A graphic element consisting of several parallel diagonal lines in shades of blue and red, forming a stylized 'Z' or 'P' shape.

 SCUEP

The logo icon for SCUEP, featuring a green circular emblem with a stylized circuit or network pattern inside.