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The analysis of passenger carriage in Polish air transport in 2011–2018 (part 2)

Analiza przewozów pasażerskich w transporcie lotniczym w Polsce w latach 2011–2018 (cz. 2)

Abstract

This article contains an analysis of Polish passenger transport in regular and charter traffic with the specification of carriers for the years 2011–2018. A forecast of traffic growth in the aviation market until 2035 is presented. Took into account situation of the pandemic in early March 2020 was addressed. The trend occurring in the examined period was analyzed and conclusions relating to the changing transport structure were made. The compilation of statistical data made it possible to carry out the analysis based on the available resources of the Central Statistical Office and the Civil Aviation Office. This allowed to fill the gap in the literature, where previously information was compiled only for each year separately.

Keywords:
air transport, airport, passenger, scheduled traffic, non-scheduled traffic

Streszczenie

Niniejszy artykuł (część 2) zawiera analizę polskich przewozów pasażerskich w ruchu regularnym i czarterowym z wyszczególnieniem państw w latach 2011–2018. Przedstawiono prognozę wzrostu ruchu na rynku lotniczym do 2035 r. Odniesiono się do sytuacji związanej z pandemią na początku marca 2020 r. Zbadana została tendencja zachodząca w badanym okresie i wysunięto wnioski związane ze zmieniającą się strukturą przewozową. Zebranie danych statystycznych potwierdziło możliwość przeprowadzenia analizy z wykorzystaniem dostępnych zasobów danych Głównego Urzędu Statystycznego oraz Urzędu Lotnictwa Cywilnego. Dzięki temu została uzupełniona luka w literaturze, gdzie informacje zestawiono tylko dla każdego roku osobno.

Słowa kluczowe:
transport lotniczy, port lotniczy, pasażer, ruch regularny, ruch czarterowy

JEL: L1, N7

Introduction

Throughout the last twenty years, air travel has become more accessible to a wide range of potential passengers. Of all the Polish air carriers, it is Polish Airline "LOT" that has for years occupied and continues to occupy the leading position. This is mainly due to legal conditions and financial possibilities. The emergence of transport operations by new independent operators has only taken place at the end of the twentieth century in the form of charter transport. In Poland, 43 carriers currently hold an Air Operator's Certificate. The vast majority of them only have a few aircraft and the flights are not regular. Polish passenger transport in regular and charter traffic was analyzed with specifying carriers for the years 2011–2018. A forecast of traffic growth in the aviation market until 2035 was presented. The trend occurring in the period under examination was studied and conclusions were drawn about the changing transport structure. It is also recommended to read "The analysis of passenger carriage in Polish air transport in 2011–2018 (part 1)", where transports by airports, cities and countries were also included.

Carriage volume per carriers

In domestic and international regular traffic, the carrier whose services were most popular with passengers in 2011 was the Polish carrier LOT together with the EuroLOT group, which until 2015 was used for transfer domestic flights. Within eight years, the number of passengers carried by this airline increased by 90% with an average annual change of +24%. Since 2015, with the discon-tinuation of services by EuroLOT, an increase in the number of passengers has been noticeable.

Significant developments took place with the Hungarian airline Wizz Air (+114% in total, +14% per year) and the Irish Ryanair (+201% in total, +5% annually). Both carriers are among the largest low-budget airlines in the world. The successful ones include German Lufthansa (+56% in total, +12% annually), British EasyJet (+105% in total, +1% annually), Scandinavian Norwegian Air Shuttle (+141% in total, +9% annually). All the above mentioned airlines consistently record an increase in the number of passengers carried from year to year. The other four carriers recorded only slight changes except for KLM Royal Dutch Airlines, which more than doubled (+137% in total, +22% per year). The results of the other ones were as follows:

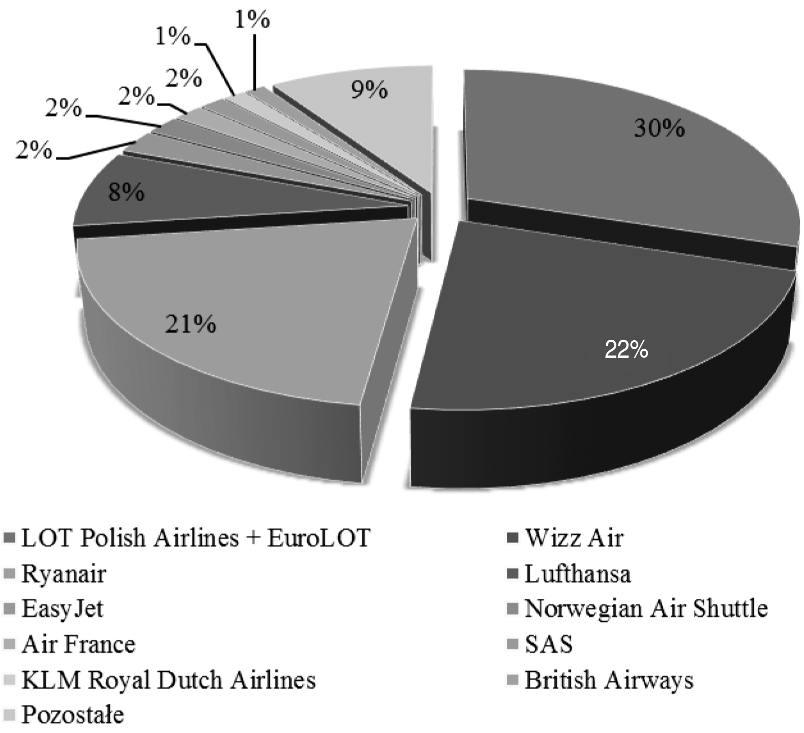
- SAS +56% in total, +2% per year,
- British Airways +49% in total, +17% per year,
- Air France +13% in total, –2% per year.

Enter Air began to achieve noticeable successes from 2017. During the year the number of passengers increased by as many as 388,000 taking into account the previous year.

The total market share of the ten most popular airlines was 91% in 2011. In 2018, this result decreased by 10 percentage points. The largest share was held by Ryanair with 27%, followed by LOT 21% and Wizzair 19%. The statistics show that when choosing a carrier, passengers rely on their popularity and reputation. The volume of passenger carriage performed by the largest carriers in the years 2011–2018 and the percentage share in the market are shown in Figures 1–4. The leader on the charter market in 2011 was the Polish carrier Enter Air, which started operating in 2010 and managed to achieve a 28% market share (with an average annual positive growth rate of +4%). It is worth noting that both Enter Air and LOT Polish Airlines are among the most popular carriers in the scheduled and charter market, with the difference that Enter Air began to be successful in scheduled traffic only from 2016, and in charter traffic from the beginning of the period under review. In the case of LOT, there is a clear difference in popularity depending on the type of market in which it provides services. LOT is much better in

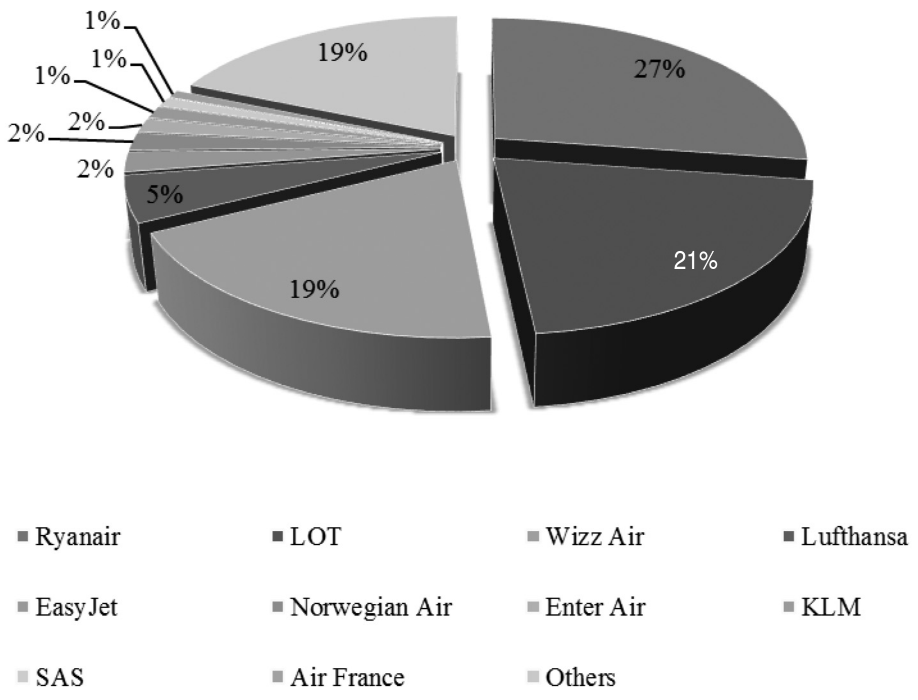
Figure 1

Share of the largest carriers in scheduled air traffic in 2011



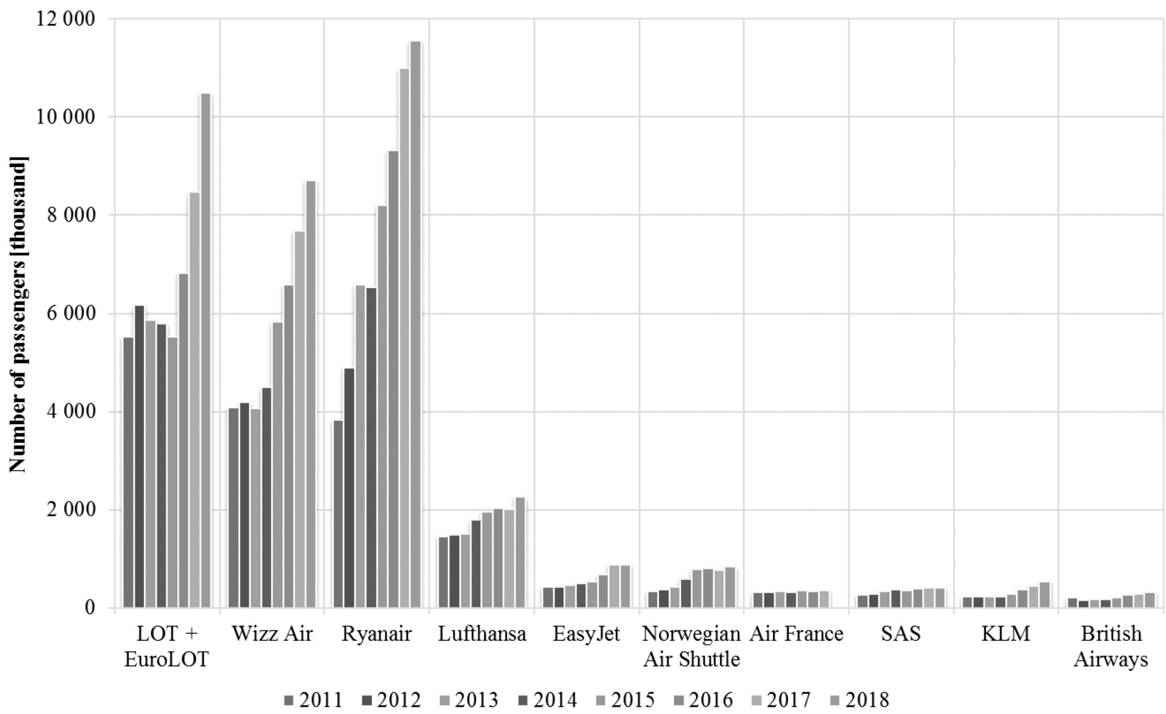
Source: own study based on www.ulc.gov.pl (15.01.2021).

Figure 2
Share of the largest carriers in scheduled air traffic in 2018



Source: see Figure 1.

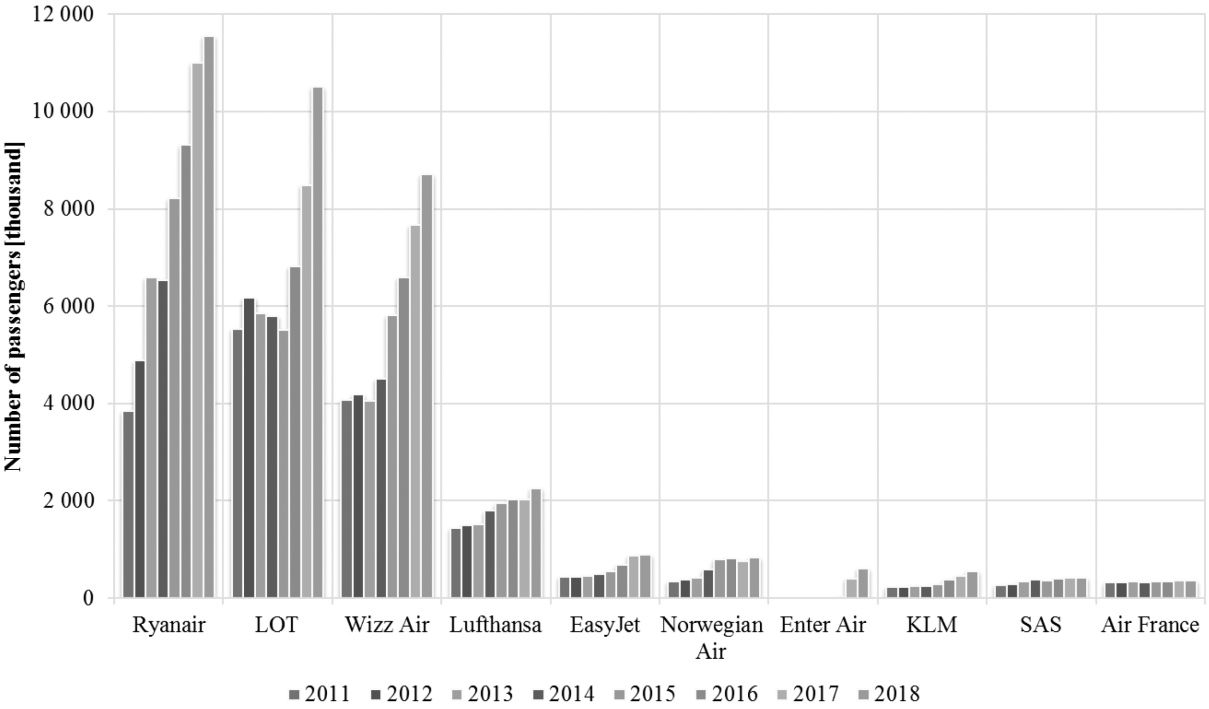
Figure 3
The most popular regular traffic operators in 2011 in passenger transport and the traffic of passengers using these operators over the years under consideration



Source: see Figure 1.

Figure 4

The most popular operators in regular traffic in 2018 in passenger transport and passenger traffic over the years under consideration



Source: see Figure 1.

regular services. The charter market has seen a continuous decline in the number of passengers since 2014. The exception was 2014, when passenger transport increased more than six times.

Also noteworthy are the carriers: Czech Travel Service with more than twofold growth (with an average annual change of 13%) and Lithuanian Small Planet Airlines, which increased its passenger traffic eightfold in more than eight years.

Despite a decrease and half a difference in passengers carried in years at the extremes of the scale, Egyptian Air Cairo remained on both lists of the most popular carriers. Onur Air has more than doubled in size and Yes Airways provided transport services in 2017 for the last time.

The other carriers were characterized by the following decline:

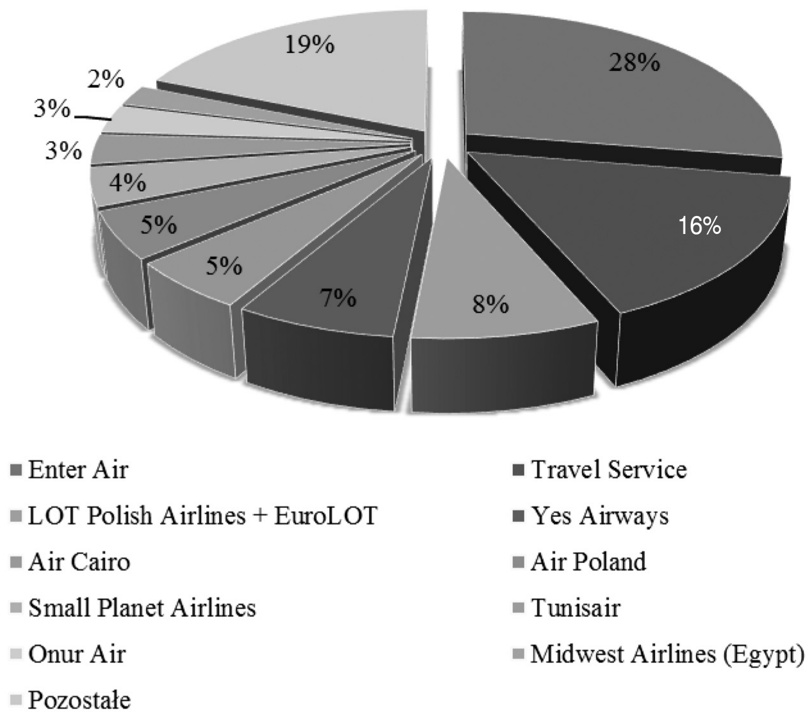
- Air Poland –100% in total, –37% per year,
- Tunisair –94% in total, –14% per year,
- Midwest Airlines –32% in total, –5% per year.

In 2018, Enter Air became the largest carrier with 25% market share. The ranking shows that among the best ones, also less known but promising airlines with the following positive dynamics emerged:

- Corendon Airlines +125% in total, +122% per year,
- Tui Airlines, which in one year at the turn of 2013/2014 increased the number of passengers carried by more than 7,000 (with annual change of +458%),
- Bulgarian Air Charter +48% in total, +10% per year,
- Israir, whose biggest breakthrough occurred in 2016/2017 with +251% in total dynamics and +84% average annual change.

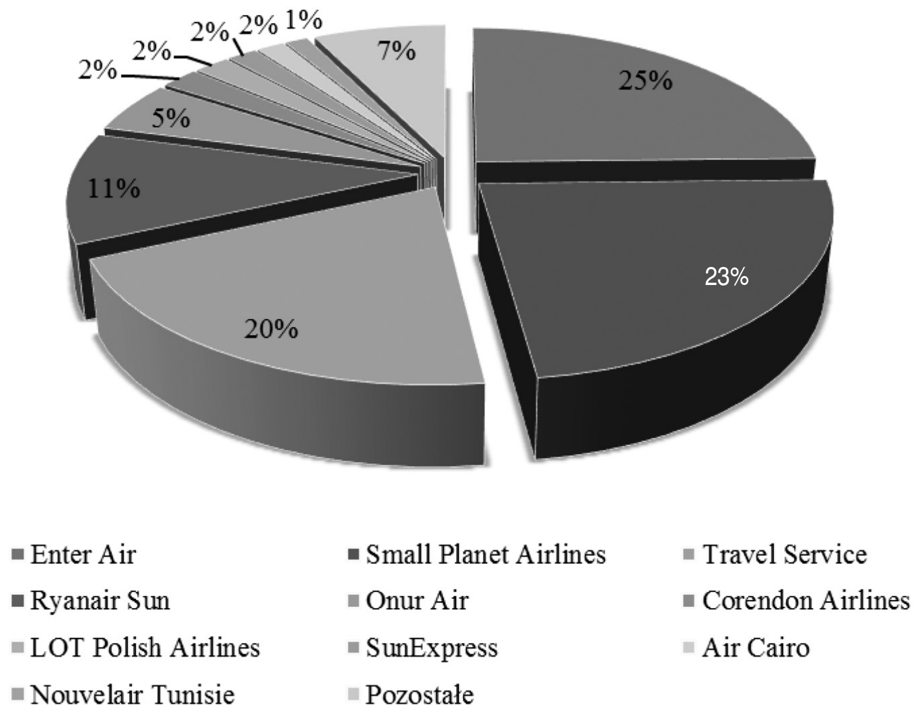
On the charter market, the vast majority of passengers decide to travel with well-known airlines — in 2011 their total share was 81% in relation to other lines, and in 2018 this value increased to 93%. In 2014, the largest share of all carriers was taken by Enter Air with 25%, followed by Small Planet Airlines 23% and Travel Service 20%. Figures 5–8 show graphs of changes in the number of passengers carried by individual airlines between 2011 and 2018 with their percentage share.The article focuses on the analysis of the Polish market, but in the case of research on the aspect of airlines, it is also worthwhile paying attention to and consider the situation in other countries. The Polish aviation market has not changed much in this respect for years — the leaders remain the low-cost carriers Ryanair and Wizz Air and the second-ranking

Figure 5
Share of the largest carriers in charter air traffic in 2011



Source: see Figure 1.

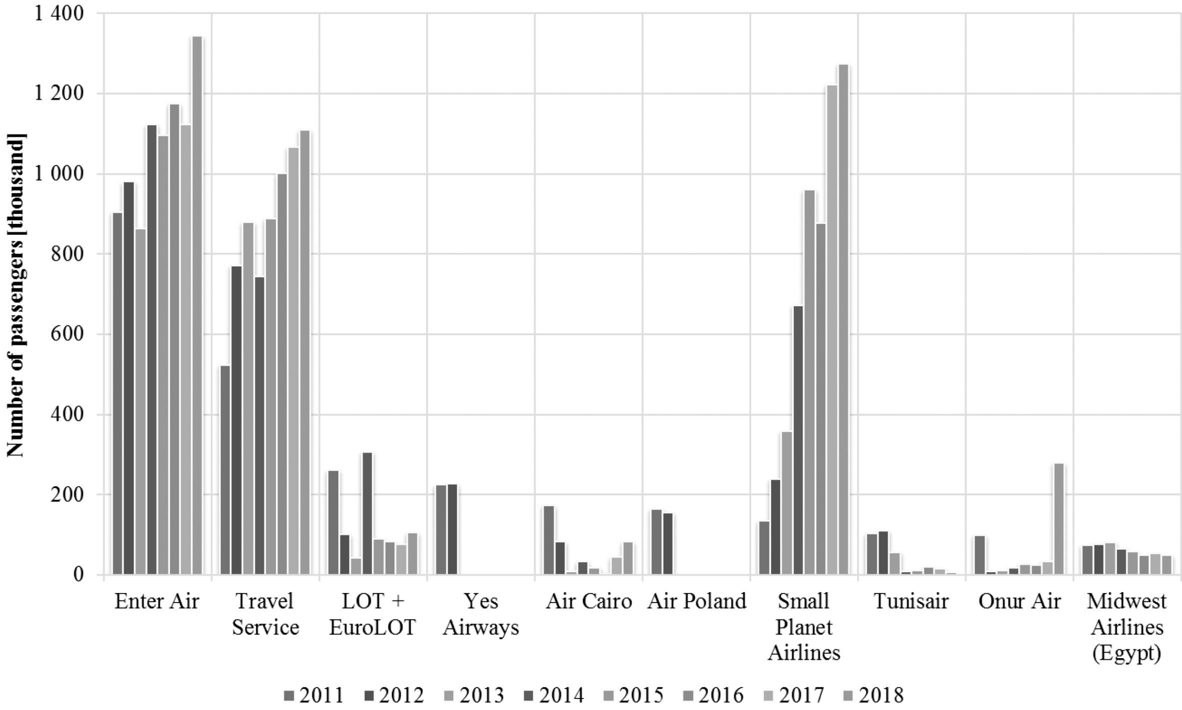
Figure 6
Share of the largest carriers in charter air traffic in 2018



Source: see Figure 1.

Figure 7

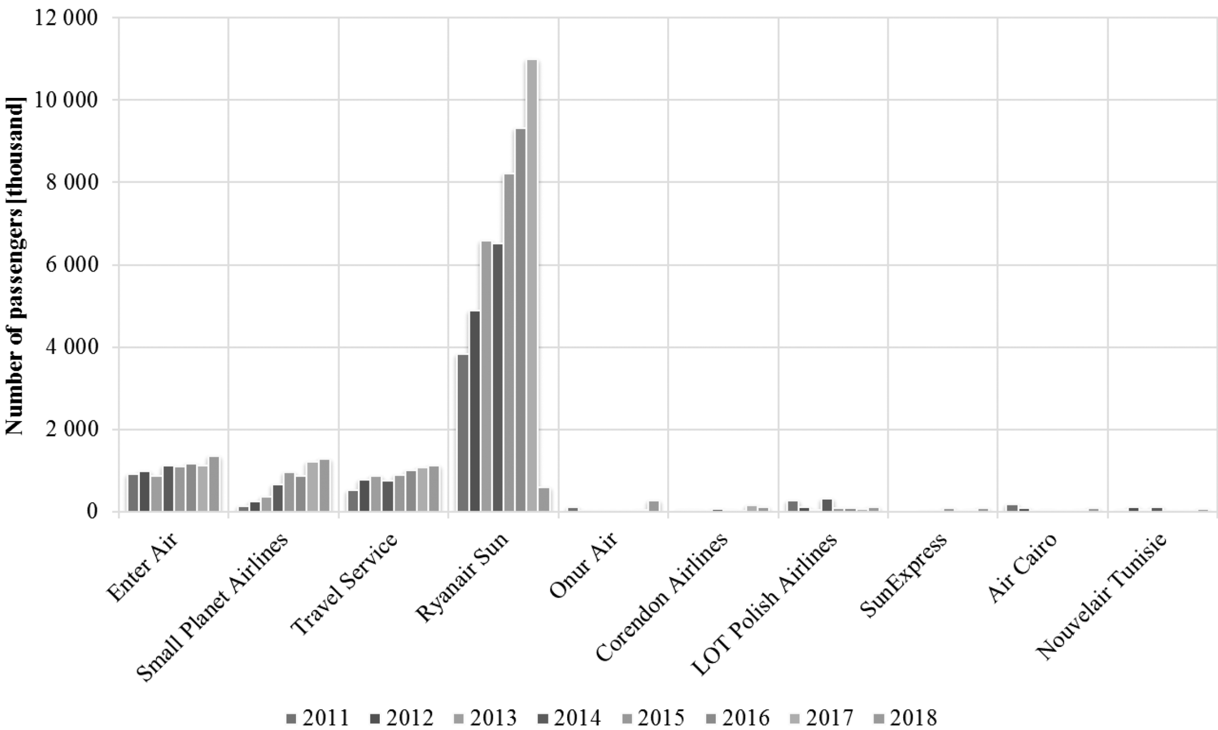
The most popular carriers in charter traffic in 2011 in passenger transport and passenger traffic over the years under review



Source: see Figure 1.

Figure 8

The most popular carriers in charter traffic in 2018 in passenger transport and passenger traffic over the years under review



Source: see Figure 1.

Table 1

The most popular carriers in terms of market share at the turn of 2018–2019 in selected CEE countries

Market	Carrier I	Carrier II	Carrier III
Poland	Ryanair	LOT Polish Airlines	Wizz Air
Romania	Wizz Air	TAROM	Blue Air
Ukraine	Ukraine International	Aeroflot Russian	Wizz Air
Hungary	Wizz Air	Ryanair	Lufthansa
Bulgaria	Wizz Air	Ryanair	Bulgaria Air
Latvia	airBaltic	Ryanair	Wizz Air
Serbia	Air Serbia	Wizz Air	Lufthansa
Lithuania	Ryanair	Wizz Air	airBaltic
Georgia	Georgian Airways	Wizz Air	Turkish Airlines
Moldova	Air Moldova	Wizz Air	FlyOne
Slovakia	Ryanair	Travel Service Group	Wizz Air
Macedonia	Wizz Air	Turkish Airlines	Austrian Airlines
Bosnia and Herzegovina	Wizz Air	Turkish Airlines	Austrian Airlines

Source: own study based on https://dlapilota.pl/ (02.05.2020).

national carrier LOT (Table 1). As far as the Central and Eastern Europe market is concerned, the rivalry between the two largest low-cost airlines — in Hungary, Bulgaria, Lithuania and Slovakia — is visible at first glance. In these countries (after Hungary), national carriers are not so popular or do not exist at all. The situation is different in Ukraine, Latvia, Serbia, Georgia and Moldova, where local airlines are leading. In 13 exemplary markets in Central and Eastern Europe (Table 1) Wizz Air is the most popular airline in 6, Ryanair in 3 countries (including Poland) [3].

In the example countries of the Western European region, the market is largely dominated by national airlines. This phenomenon is noticeable in the UK, Germany, France, Greece, Portugal and Belgium. Four out of ten countries (Table 2) are the most frequent users of Ryanair services, including two large European markets such as Spain and Italy. In the countries where passengers choose to travel with local airlines most often, the most popular low-cost carriers Ryanair and Wizzair do not take market leadership easily (Tables 1 and 2).

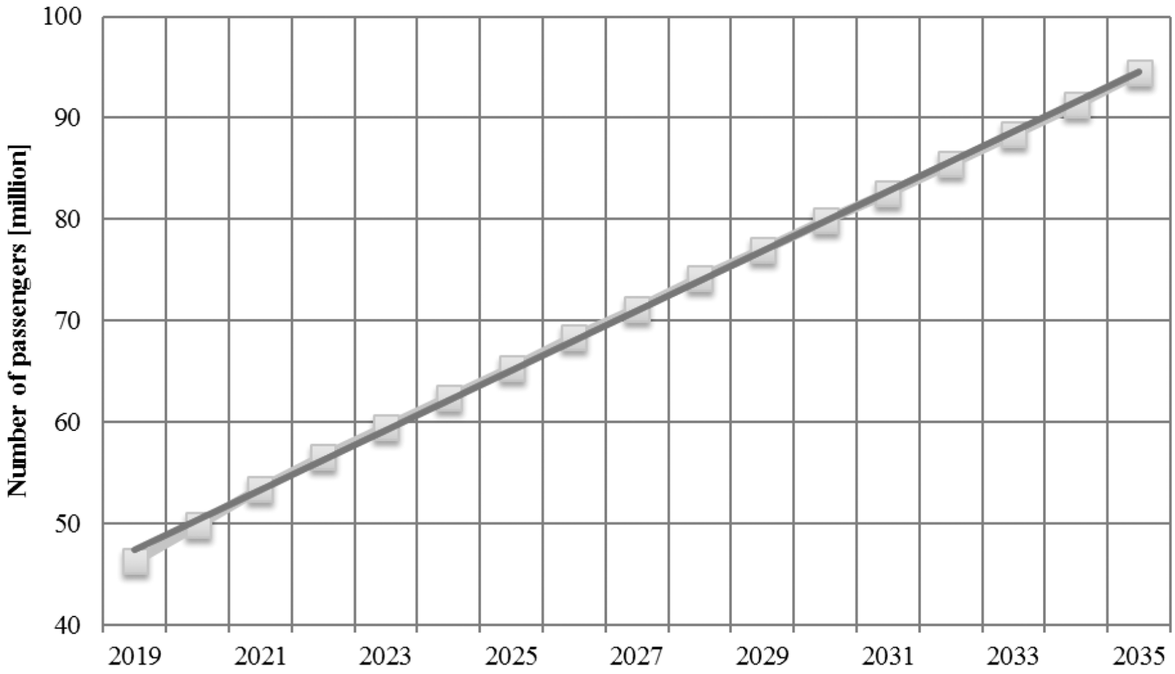
Table 2

The most popular carriers in terms of market share at the turn of 2018–2019 in selected Western European countries and Poland

Market	Carrier I	Carrier II	Carrier III
Great Britain	EasyJet	Ryanair	British Airways
Spain	Ryanair	Vueling	Iberia
Germany	Lufthansa	Ryanair	EasyJet
Italy	Ryanair	Alitalia	EasyJet
France	Air France	EasyJet	Ryanair
Greece	Aegean Airlines	Ryanair	SkyExpress
Portugal	Air Portugal	Ryanair	EasyJet
Poland	Ryanair	LOT Polish Airlines	Wizz Air
Ireland	Ryanair	Aer Lingus	British Airways
Belgium	Brussels Air	Ryanair	Jetairfly

Source: Wizz Air, 2019.

Figure 9
Projection of growth of air passenger transport in Poland in 2018–2035



Source: see Figure 1.

Carriage volume forecast 2019–2035

Forecasts by the Civil Aviation Office from 2017 disclosed more than double the increase in passenger traffic in Poland, comparing the actual values of 2017 with those expected in 2035. The number of passengers transported is estimated to reach 94,46 million passengers per year. The opening of a central airport between Łódź and Warsaw (Solidarity Transport Hub) with a planned capacity of 50 million passengers per year is supposed to contribute to such a spectacular growth. The second factor influencing such a huge development is the planned expansion and modernization of the existing airports. The graph presenting the forecast of domestic and international passenger traffic in 2019–2035 together with the trend line is shown in Figure 9 (Ryanair, 2019; Wizz Air, 2019).

Conclusions

The availability of statistical data enabled the carrying out of a detailed analysis showing the dynamics of passenger transport in the analyzed years in regular and charter traffic of air carriers whose services were used most often in Poland. Civil Aviation Office provides analyzes of passenger transport, and they concern at the audited year. On the other hand, the article analyzes the years 2011–2018 together, which means that the need for this gap in the literature has been supplemented.

The carrier in domestic and international regular traffic, whose services were most frequently used by travelers in 2011 was the Polish carrier LOT together with Eurolot. Since the end of Eurolot's services, an increase in the number of passengers was noticed. Both Wizz Air and Ryanair, as two of the largest "low-cost airlines", experienced growth during the period under review. Lufthansa and EasyJet are promising. The majority of the carriers recorded a year-on-year increase in the number of passengers carried. The changes in the ranking of the best carriers both on the regular and charter market prove the flexibility of travelers towards changing offers — the price of a flight being of great importance when choosing it, as evidenced by the great popularity of low-budget carriers (Ryanair, 2019; Wizz Air, 2019).

The key carrier in domestic and international charter traffic in 2011 was Polish Airlines Enter Air. LOT is incomparably better placed on the regular services market. In 2017, Enter Air became the leader with 25% of the share. The ranking shows that among the best ones, also less popular but thriving airlines emerged. This is due to the dependence of offered destinations — the more popular a destination is, the more successful is an airline that offers direct connections from/to a given destination.

Another reason for the volatility of some carriers (both scheduled and charter traffic) is the loss of the necessary license or the withdrawal from the market of services provided. During the period of economic transition, new carriers were set up but also gave up their air services. In a market economy, it is normal for some carrier companies to stabilize while other carriers emerge and disappear1 .

Continuous modernization and development of air transport infrastructure strengthens the social and economic position of the country. Achievement of another twofold increase in passenger transport by 2035 is estimated. The main impulse for such a large development will be the opening of the Solidarity Transport Hub between Łódź and Warsaw in 2027.

However, there is now a worldwide airline crisis caused by the spreading coronavirus pandemic, which is having an increasing impact on the airline industry. As a result of the epidemic outbreak, carriers have suspended scheduled flights to and from Poland as well as domestic flights. Due to the closure of borders, the introduction of numerous restrictions on business and tourist traffic, as well as the resignation of travelers, Polish air traffic is experiencing a sharp drop in passenger traffic from day to day. Only on 15 March the number of take-offs and landings at all Polish airports decreased by almost 83%. Carriers' concern is that passengers do not cancel the planned trips. For this reason, they offer favorable booking, conditions which consist of a number of options such as using the value of the ticket in the form of a voucher, changing the date or re-routing (Walków, 2020).

The Civil Aviation Office confirmed that on 29.04.2020 the first drone flight in Poland took place, which transported samples for testing for the presence of SARS-CoV-2. It is a big step towards the practical use of drones to help in the fight against the coronavirus, because their use for medical transport during the pandemic may expedite the transport of samples for the virus testing. This shows the development of the Polish drone industry, which in the opinion of the Civil Aviation Office is already prepared to provide an innovative transport service in and between cities[2].

Przypisy/Notes

[1] https://dlapilota.pl/ (02.05.2020)
[2] Tamże.

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