DEVELOPMENT OF POLISH REGIONAL AIRPORTS IN THE CONTEXT OF TOURISM NEEDS

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Abstract: Transportation and travel can be discussed without taking tourism into consideration, but tourism cannot thrive without travel. Transportation is an integral part of the tourism industry. It is largely due to the improvement of transportation that tourism has expanded. Air transport industry has substantially reduced travel time and travel costs for longer haul travels inside Europe in competition and complementarity with other transport modes. As a result over half of international tourist arrivals globally are now by air and international air passengers are predominantly tourists. The article presents development of Polish regional airports in the context of tourism industry needs. Author presents characteristics of polish aviation market, putting special attention on charter market. He also examines the development of Polish regional airports.

Key words: charter flights, regular flights, airports development.

Introduction

Air transport embraces all measures and activities directly and indirectly determining performance of transport processes in airspaces. According to the definition included in Aviation Law (Act of 3 July 2002) air conveyance shall be deemed flight or series of flights which carry passengers, goods, baggage or post for remuneration, in this case based on airplane use agreement.

Air transport could not exist without entities operating on the market of aviation services. Actors involved in the aviation market are passengers, carriers (airlines), airports and handling agents. There are many dependencies among those actors. Relations that exist between sellers and offeror of a given services and buyers play an important role in the whole process of buying and selling (Ślusarczyk and Kot, 2015; Rucińska, 2011).

Current technological development caused the rapid development of air transport, which occurred in the twentieth century. It allows for easy travel between countries. This progress had a great importance. New airlines were created what results in increased competition and prices differentiation, what is beneficial from the customer point of view. Also speed, comfort and safety of travel have improved (Laprus, 2010).

Transportation links the various destinations and ferries people, goods, and services. Tourism is all about travel; and the role of transportation in its operation is vital. It is largely due to the improvement of transportation that tourism has expanded. The advent of flight has shrunk the world, and the motor vehicle has

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made travel to anywhere possible. This reality coupled with changing work patterns and innovative marketing has driven international mass tourism through the years (Sorupia, 2005).
Whether transportation plays important role in enriching the travel experience of a tourist depends on the mode of transportation and the frequency of use (Mammadov, 2012). One of the most important transportation modes in tourism is air travel. Air travel has made significant changes in people's minds concerning time and distance. In order to meet the demand which increases every day, the airline companies spend billions of dollars and apply new technological innovations (Westlake and Robbins, 2005). The comfort, security of aircraft, and smiling service are very important elements of tourist travel experience. In this sense, many countries build new airports, buy new aircraft and train the personnel in order to develop tour-ism sector (Goeldner and Ritchie, 2012).

Development of tourism and air transport

Air transport is key for tourism. The extraordinary growth of international tourism over the last decades is as much due to advances in air transport as to the rise of the middle class, growing prosperity, appearance of new forms of information and communications technology and forces of globalization. In 2012, over half of all international tourists arrived at their destination by air.
Similarly, the growth of air transport - which is the main component of civil aviation - is intrinsically connected to the expansion of tourism. The vast majority of international air passengers are travelling for tourism purposes, whether leisure or professional, and in many countries aviation is key for domestic tourism development (UNWTO, 2011).
Recent research shows that the measure of connectivity is closely correlated with important economic variables including the degree of liberalization of air transport markets (World Bank, 2011). Similarly, it has been estimated that replacing the most restrictive bilateral air services agreement with the most liberal agreement may increase traffic by over 75% (World Trade Organization, 2008).
A key factor for the future development of tourism is the continuing need for air transport market liberalization. Air connectivity could be improved through carefully designed regulatory liberalization encompassing market and capital access in the context of tourism and trade, notably in terms of more 'open skies', freeing up air carrier ownership and control restrictions, and developing a framework 'beyond bilateralism'. Although its application is still too limited, the concept of open skies has undoubtedly opened markets and generated new traffic for aviation and new tourism demand for destinations (UNWT, 2011).
The tourism development agenda is inextricably linked with that of air transport. Tourism represents not only air transport's primary end user, but it offers a unique opportunity for economic growth and development for all nations and particularly for least developed countries.

Both UNWTO and ICAO estimate continued growth, with 1.8 billion international tourist arrivals by 2030, 52% of which will arrive at their destinations by air and 6.3 billion scheduled passengers worldwide by 2030 (UNWTO, 2011).

For this to be achieved, and particularly with a focus on green growth, some challenges have to be overcome in the tourism and aviation nexus. For aviation, these include: infrastructure capacity and operations; congestion; volatile fuel prices and availability of alternative fuel; predicted pilot shortages; regulatory economic constraints; responsive air transport policies and environmental sustainability. From the tourism perspective there is need to focus on: further improving air connectivity through air transport liberalization, more visa facilitation and ongoing infrastructure development; addressing the rights and obligations of tourist consumers and travel organizers; fostering a reduction in unsubstantiated and harmful taxes and duties; and mitigating climate change.

Separately, aviation and tourism will not overcome these challenges on their own. In order to resolve them, closer cooperation and collective action beyond functional ‘silos’ of tourism and air transport is needed, fostered at national level by appropriate government direction and at the global level by the joint work of UNWTO and ICAO, the UN specialized agencies for tourism and civil aviation, with the support of other international and regional stakeholders.

Characterisitics of Polsih air transport market

2004 year is an important year for air transport, because Poland joined the European Union and the Schengen area. Normalization of laws has improved the functioning and structure of the aviation market in Poland. An activity of Polish society, express by index figure and calculated as the ratio of the number of passengers to the size of the population in the year 2004 was 0.23 (ULC, 2008). Despite an increase in mobility in Poland and achievement the level of 0.65 in the year 2013, it is still low in comparison with EU countries.

Currently, there are 12 international airports in Poland. The dominant player is metropolitan Warsaw Chopin airport. The remaining 11 units are regional airports (their names are included in table 1). In the years 1995-2003, (with the exception of the year 2002) air traffic increased annually by approx. 0.5 million passengers. After the liberalization of the market, these increases have exceeded 1 million passengers, reaching level 4 million in the record 2006. In 2013, Polish airports served more than 3.5 times more passengers (+18 mln more passengers) than in 2003. For comparison, it is worth to mention that in 2003 Polish airports served 4.5 mln passengers more that in 1993.Thus, within 10 years after the liberalization, aviation market in Poland increased four times more, compared to the same period before the liberalization (ULC, 2014a).

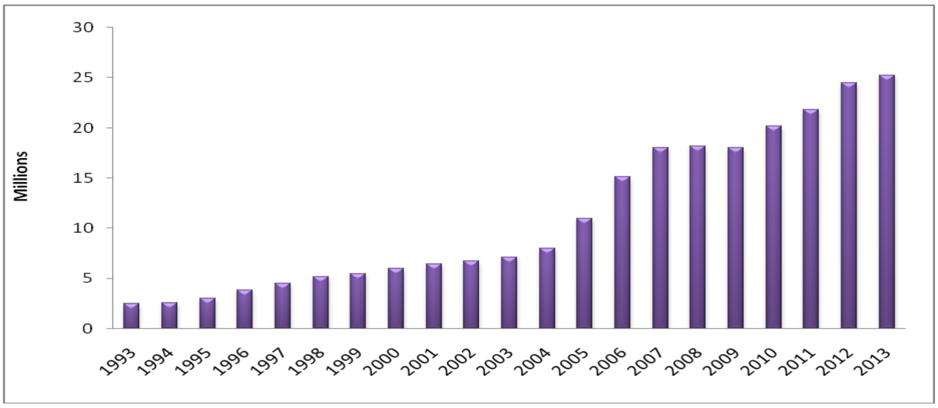

Figure 2. The number of passengers served by Polish airports in the years 1993-2013 (data from ULC)

As a result of the liberalization, Polish market had undergone a huge transformation. Dynamics of the air traffic significantly accelerated. While, at the turn of the century, air traffic has increased at an annualized rate 7-12%, since 2004 Polish airports served 20-30% more passengers per year. Such high increases were stopped by the crisis in the years 2008-2009. After liberalization of the market, only in the years 2003-2006 air traffic in Poland doubled (ULC, 2014a).

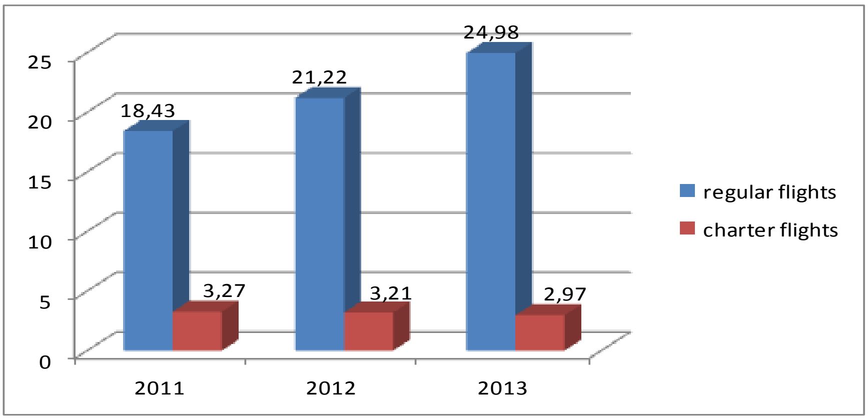

Figure 2. The number of passengers served by Polish airports in the years 2011-2013 in regular and charter flights in millions (data from ULC)

In 2012, Polish airports served 21.22 mln passengers in regular traffic and 3.21 in charter traffic. This value was 15% higher in the case of regular flights and 2% lower in the case of charter flights, compared to the previous year. However in 2013, the number of passengers in regular traffic amounted to 24.98 mln and in charter traffic – 2.97 mln. Thus, the number of passengers in regular traffic increased by 18% while in charter traffic decreased by 7.5% (Figure 2).

Airport	The number of passengers using charter services	The number of passengers using regular services
Warsawa Chopin airport	1 355 497	8 211 566
John Paul II International Airport Kraków–Balice	154 064	3 254 890
Katowice International Airport	755 875	1 762 534
Wrocław-Copernicus Airport	230 571	1 711 429
Poznań–Ławica Henryk Wieniawski Airport	371 365	1 188 969
Łódź Władysław Reymont Airport	46 356	417 103
Gdańsk Lech Wałęsa Airport	211 304	2 650 470
"Solidarity" Szczecin-Goleniów Airport	22 096	324 967
Bydgoszcz Ignacy Jan Paderewski Airport	31 596	296 503
Rzeszów-Jasionka Airport	35 006	527 928
Zielona Góra-Babimost Airport	382	11 908
Warsaw-Modlin Airport	15	857 466
Lublin Airport	0	5 697
Total	**3 214 127**	**21 221 430**

Table 1. The number of passengers in particular Polish airports in 2012 in division on regular and charter traffic (data from ULC)

In terms of regular and charter flights, the leader was Warsaw Chopin Airport, which in 2012 served 8.21 mln passengers in regular flights and 1.36 mln in charter flights. In terms of charter flights, Katowice Airport took a second place. 755 thousand of passengers use their services. In terms of regular flights, the second was John Paul II Airport Kraków-Balice (3.25 mln) (Table 1).

Air charter market

The significance of this market in Western Europe decreases, because more and more air traffic is being repossessed by regular carriers. On long-range routes - network, on shorter routes cheap ones. Tourists often prefer the possibility of own creation of the "package", individually reserving the flight and searching for the most appropriate hotel offers through the Internet. Up to 2011 traditional charter market in Poland grew more quickly than the market of regular transports (Seraph, 2011).

On our market, the offer of cheap lines to typical holiday cities has very much limited character.

We also observe the phenomenon of accessing of the charter lines on the market of individual transports – ticket sale without hotel packages. In Poland stable development of the charter market assures increasing quite quickly individual consumption and a conservatism of a very large group of customers, which prefer buying full tourist packages.

We observe the phenomenon of a mushroom growth of Polish private charter carriers at the simultaneous withdrawing of PLL LOT from this market. Still in 2010 LOT was the largest carrier - over 16.5% of the market share. LOT would have a chance to develop Polish market of winter long-range charters, exploiting very good B787 cost parameters, but most clearly it is not interested in it. Dreamliners, which LOT will receive, will have the arrangement of the passenger cabin maladjusted for charter transports (relatively few armchairs and a large Premium Economy class).

And here we reach to probably the biggest strategic dilemma of Polish charter carriers. How to develop the market of winter transports so that planes will be intensively used not only within 5 months of the summer season? (Seraph, 2011).

As for the geographical schedule of the market, Warsaw has about 43%, Katowice as far as 25%, Poznań about 12%, Wrocław – 7% (estimation on the base of data from 2010) and GDN and KRK about 5%. It seems probable that in the longer temporary horizon opening the airport in Modlin should contribute to the faster market development for Warsaw and its suburbs - lower charges, lack of quiet hours (Frydrykiewicz, 2013).

In 2013 the total result of all Polish airports was slightly worse in comparison to European airports consisted in ACI, which registered the height on the level of 2.8%. Yet, it should be recognized as a very good result, taking into consideration that in 2013 the traffic was higher as far as about over 15% in comparison to 2011 (ULC, 2012).

However in 2013 Polish airports supported over 2.977 million passengers at the international charter air traffic. 2013 was the second year in a row, during which falls in the number of passengers were seen. However the Office of the Civil Aviation calms that this fall does not seem to have a structural nature. It is most probably a result of the distinct fall in the travel into the area of North Africa, particularly to Egypt. The fall in an interest of the area of North Africa results i.a. from lack of stability in this area of the world. In 2012 Egypt still led the field, as regards charter travels, but in 2013 already fell to third place. Greece however, which in 2012 filled the third position, taken the first stand. In 2013 Turkey continued the second place without changes (ULC, 2014).

In the winter period distant-distance directions in Asia, Africa (Kenya and Republic of the Green Cape), Mexico and the Caribbean enjoy more and more great popularity. In the summer period however grows an interest in transports in Europe (mainly Greece, Portugal and Bulgaria) and into the area of the Centre East. In 2013 Antalya was a city, to which most willingly Polish tourists went– 40.3 thousand of passengers of charter air traffic landed there. On the second place was Tel Aviw with over 34.4 thousand of holiday makers. Tenerife positioned itself on the third position – with over 25.6 thousand of persons. Hurghada took the fifth place last year with the result of 18.4 thousand of people (ULC, 2014).

Amongst regional airports a determined leader was Cracow, which accounted the rise in transports by over 230 thousand of passengers. Similarly, as in case of the airport in Warsaw, this result was achieved thanks to the offer of low-cost carriers (+18%), within which Ryanair registered the greatest result. Remaining regional airports, except for Rzeszów and Bydgoszcz, registered falls.

Seasonal character in Polish airports

Dynamics of the air traffic developed unevenly during the entire year. Since May by July the market registered falls in comparison to analogous months of the previous year. Such a situation was a result of the dynamic growth of the offer of domestic transports fulfilled by the OLT carrier in 2012. If transports of this carrier would be omitted in this analysis, the rise in the traffic regards all months of 2013 (ULC, 2014).

The dynamic growth of the traffic in spring-summer of 2012 affected results of the seasonal character of the traffic. While in 2012 in months of the summer season (from April up to October) the traffic was 2.25 times bigger in comparison to winter months, in 2013 this relationship took out 2.13. However, the result of 2013 was almost identical in comparison to 2011 (ULC, 2014).

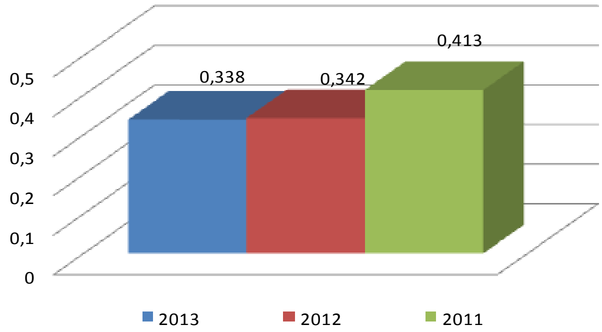

Figure 3. Dynamic of air traffic in Poland in the years 2011-2013 (data from ULC)

2013 was the second year of falls on the market of charter transports. However, this fall does not seem to have a structural nature. It is most probably a result above all of distinct fall of the travel into the area of North Africa (-35%), in particular to Egypt, connected with anxieties in this area of the world and the lack of the alternative, cheap offer.

By virtue of the fact that north-African directions traditionally constituted the main offer of winter holiday flights, the charter market felt the deeper drop of the traffic in November-April (-10%). Since May by October the move diminished however by 6%. In the winter period distant-distance directions into the area of Asia, Africa (Kenya and the Republic of the Green Cape), Mexico and Caribs are enjoying more and more popularity. In the summer period however one can see the rise in transports to Europe (in particular Greece, Portugal and Bulgaria) and into the area of the Centre East (ULC, 2014).

Specificity of the development of Polish regional airports

The aviation sector is a highly innovative industry whose development largely depends on transnational cooperation and the situation on the global markets. Airports in Poland have been developed intensively in the last few years. Civilian aviation is the fastest growing branch of transportation in the country, and the rate of growth is among the highest in the World.

Despite significant increase in passenger flights, Poland takes one of the last places in Europe in terms of air mobility. Air mobility factor is a parameter which describes the volume of air traffic in relation to the number of residents of the country. Expansion of low-cost carriers in Poland enables significantly increase the number of passengers served in airports in the short time. Initially, the boom was mainly based on huge demand for trips to the British Isles, because after the accession to the EU, their labor market was opened for Poles. Then families and friends of Poles living in Isles begun to visit them. Even, if as a consequence of the economic crisis, the number of Poles living in the British Isles fell, demand for these trips remained at the relatively high and stable level.

Along with Poles enrichment, demand for tourist travel increases. Due to low costs of flight, more and more popular become multi-day trips to the capitals of European countries or holidays in the Italian and Spanish resorts. Also foreigners are willing to visit Poland and they constitute on average 20-30% of all low-costs airlines passengers. These phenomenons allow systematically expand an offer.

Currently, leading Polish regional airports have direct connections to most of Western Europe countries. In parallel with the rapid development of low-costs flights over the last few years, it was possible to notice a rapid increase in interest in holidays in Mediterranean countries. The growth rate of this sector of air traffic often has reached the level of several dozen percent per year. Despite fierce competition, regular flights did not lose popularity in this period. It is known that business travelers do not avoid low-cost airlines; however, they are not always able to meet their expectations related to the frequency of connections and possibility of connecting flights. That is why, an increase in traffic in this sector reaches on average the level of a few to several percent per year (Sztucki et al., 2010).

Summary

Air transportation is a major industry in its own right and it also provides important inputs into wider economic, political, and social processes. The demand for its services, as with most transport, is a derived one that is driven by the needs and desires to attain some other, final objective such as in the case of tourism. Because of the development of tourism market in Poland and all over the world, many travelers choose airplanes as their means of transport. These are mainly charter flights but not only, because more and more travelers plan their trip alone and decide to use low-costs airlines. In order to meet the demand which increases every day, the airline companies all over the world spend billions of dollars and apply new technological innovations. The comfort, security of aircraft, and smiling service are very important elements of tourist travel experience. Polish regional airports also develop and try to do everything to meet expectations and adapt to the increasing number of passengers and European Union standards.

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ROZWÓJ POLSKICH REGIONALNYCH PORTÓW LOTNICZYCH W KONTEKŚCIE POTRZEB TURYSTYKI

Streszczenie: Transport i podróżowanie mogą być omawiane bez brania pod uwagę turystyki, ale turystyka nie może się rozwijać bez podróżowania. Transport jest integralną częścią przemysłu turystycznego. Turystyka rozwinęła się w dużej mierze dzięki usprawnieniu transportu. Branża transportu lotniczego znacząco skróciła czas i koszty podróży na dłuższym dystansie wewnątrz Europy w konkurencji i komplementarności z pozostałymi rodzajami transportu. W rezultacie ponad połowa międzynarodowych przyjazdów turystycznych na całym świecie odbywa się obecnie drogą lotniczą a międzynarodowymi pasażerami linii lotniczych są głównie turyści. Artykuł prezentuje rozwój polskich regionalnych portów lotniczych w kontekście potrzeb branży turystycznej. Autor przedstawia cechy polskiego rynku lotniczego, kładąc szczególną uwagę na rynek czarterowy, zajmuje się również badaniem rozwoju polskich lotnisk regionalnych.

Słowa kluczowe: loty czarterowe, loty regularne, rozwój portów lotniczych.

波蘭支線機場的旅遊需求過程中發展

摘要：運輸和旅行可以不考慮旅遊業考慮進行討論，但旅遊業不能茁壯成長沒有旅行。交通的一個組成部分旅遊業。這主要是由於交通的改善，旅遊業具有擴大。航空運輸業已大幅減少出行時間和出行成本為歐洲內部的長途較長傳播競爭性和互補性與其他交通方式。結果超過一半的國際入境旅遊人數全球現在通過空運，國際航空旅客主要是遊客。本文介紹了在旅遊行業需求的背景下波蘭支線機場的發展。作者介紹了波蘭航空市場的特點，將特別關注租賃市場上。他還考察了波蘭的支線機場的發展

關鍵詞：包機，定期航班，機場的發展