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THE COMPETITIVE POSITION OF THE LOW COST CARRIER WIZZ AIR ON THE POLISH MARKET OF AIR TRANSPORT SERVICES

Abstract

In the air transport market, competitive processes are seen more and more in terms of intra-industry, hence air carriers strive to achieve a high competitive position. Thus, the main goal of the research undertaken in the article is to assess the competitive position of the Hungarian air carrier Wizz Air. On the basis of the presented objective, the factors influencing the achievement of competitive position by enterprises were analyzed. The article uses available secondary sources in relation to the Polish air transport market. When analyzing the functioning of Wizz Air, the airports in which the aircarrier conducts operational activities were selected. The comparative analysis was carried out on selected routes where competition between Wizz Air and other carriers takes place.

Keywords: competitive position, Wizz Air, air carrier, airport

Introduction

Dynamic changes related to Poland's accession to the European Union caused a rapid development of the air transport services market. As a result, low-cost carriers started their operations. Over the last dozen or so years LCC carriers have contributed to providing the Polish public with a transport service with diverse parameters. High quality services and low prices have resulted in increased demand for air transport services. In the 13 years since the introduction of the open sky policy, the Polish market has changed radically. New airports have been created, the scope of local government involvement in the activities of aviation entities has increased, and the air transport service itself is not currently a luxury good.

The opportunities resulting from the liberalization of the market contributed to the development of competitive processes. Traditional and low-cost carriers are forced to take actions aimed at achieving a high competitive position.

Competitive position of enterprises

Economic literature in the context of competition shows a different approach to the issue of competitive position. However, all interpretations connect competitive positions with the company's ability to be competitive. Determining the competitive position is the initial stage of strategic analysis for enterprises. Paul Simister identifies a competitive edge as having a clear advantage over the competition in terms of one or more elements of the market mix that is valued by the potential customers (Stankiewicz, 2002).

When analyzing the concept of competitive position, three approaches may be distinguished. The first according to Strategor and Hax and Majluf presents the competitive position as an analysis of the company's possibilities from the point of view of sources being key success factors (Strategor, 1999; Hax, Majluf, 1990). In turn, Kay and Day determine the competitive position of the company as a result of competitive processes, achieving a competitive advantage (Kay, 1996; Day 1997) . The third approach is represented by J. and J. Taggart and Pierścionek as the source, manifestation and measure of competitiveness at the same time. According to the authors quoted above, the competitive position is the result of mutual relations between three factors: the potential of competitiveness, competitive processes and the results of competition (Taggart, Taggart 1999; Pierścionek, 1996).

Based on the definitions presented above, the factors influencing the competitive position are worth presenting (Figure 1).

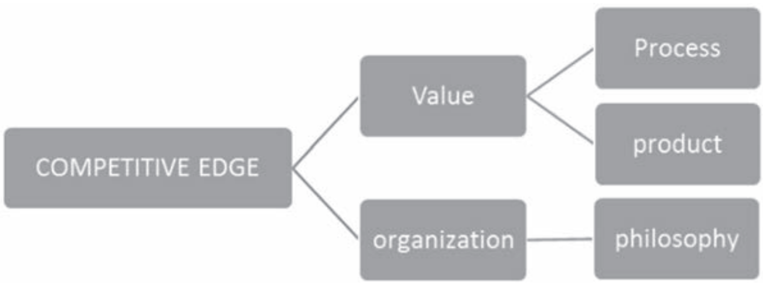


Figure 1. Factors affecting the competitive position of companies
Source: (www.nldistributors.com, Accessed 30 March 2018)

The aim of competitive position analysis is to determine the size of competitive advantage, its durability and sources. The competitive position is determined on the whole market or in relation to selected market segments. The assessment of competitive positions consists of three stages:

– determination of competitive advantage,
– analysis of factors determining the competitive position,

– assessment of sources of competitive advantage (Pierścionek, 1996).

In order to analyze the competitive position, Pierścionek and Strategor indicate the following factors:

– market share,
– financial situation of the enterprise,
– marketing-mix elements,
– implementation of innovative undertakings,
– bargaining power of the market environment (Strategor, 1999; Pierścionek, 1996).

Taking into account the majority of the above factors, the article will be analyzed in relation to the air carrier Wizz Air, taking into account other competing carriers.

Metodology

The subject of the research is to determine the competitive position of the Hungarian low-cost carrier Wizz Air. The main reason for undertaking research in this area is the lack of analyzes regarding the competitive position of air carriers. However, there are numerous publications regarding competition on the transport market (see: Rosa, 2013; Rucińska, Ed. 2015; Koźlak, 2007), especially on the air transport market (Tłoczyński, 2016). The Polish market of air transport services was accepted as the research area, and the carrier's operations at Polish airports were broadly defined. The analysis excludes those airports in which Wizz Air is not operating. Finally, the airports located in Warsaw, Gdańsk, Katowice, Wrocław, Poznań, Lublin, Olsztyn and Szczecin were analyzed. The main method used for research works is the comparative analysis. The shares of Wizz Air carrier on the Polish market were determined, the supply of carrier services from particular airports was presented and the supply was assessed in relation to competitors on the same routes. In the final part, the benefits of Wizz Air functioning on the Polish market of air transport services were presented.

The author realizes that the presented research results are only a part of the issues related to the competitive position of Wizz Air on the Polish market. Therefore, it is necessary to continue extended research on the issue of competitive position of aviation entities operating in Poland.

Low-cost carrier on the Polish air transport market

With the introduction of the open sky policy in Poland, low-cost carriers began operating. One of the first operators to start operating in Poland was the Hungarian Wizz Air. On 19 May 2004, from the airport in Katowice, the carrier made one flight no. 101 to the Luton airport in London. Since then, this carrier has increased the number of air connections, launching airbases, becoming one of the most important entities operating on the Polish market of air transport services.

Currently, there are several dozen air carriers operating on the Polish market, operating on domestic, continental and non-European routes, differing in size, capital structure, ownership form and the number of aircraft owned. The operators transported more than 26 million passengers in 2016, i.e. 14.02% more than in 2015. The share of low-cost carriers was at a similar level as in 2015 and amounted to 59.22%. This proves the stable dominance of low-cost carriers on the Polish market, a similar indicator has been maintained for several years.

In 2016, on the market of air transport services, competitive processes between carriers were intensified. On the majority of routes serviced by Polish Airlines LOT the main competitors are large transport companies, e.g. Lufthansa, Air France, KLM and low-cost carriers such as Wizz Air (this concerns connections from the Warsaw Chopin Airport). The competition also took place on domestic flights between Polish Airlines LOT and Ryanair (connections Gdańsk – Warsaw, Gdańsk – Kraków and Wrocław – Warsaw).

Table 1. Domestic and international scheduled operations – passenger traffic by carriers in Poland (2015–2016)

No.	Carrier	2015		2016		Dynamics 2016/2015
		Number of passengers	Share in %	Number of passengers	Share in %	
1	Ryanair	8 211 803	30.76	9 305 729	30.57	13.32
2	Polish Airlines LOT + Eurolot SA	5 488 472	20.56	6 812 360	22.38	24.12
3	Wizz Air	5 818 709	21.79	6 594 301	21.66	13.33
4	Lufthansa	1 958 067	7.33	2 026 494	6.66	3.49
5	Norwegian Air Shuttle	791 135	2.96	809 483	2.66	2.32
6	easyJet	543 198	2.03	667 696	2.19	22.92
7	SAS	358 521	1.34	394 536	1.30	10.05
8	KLM Royal Dutch Airlines	277 987	1.04	378 143	1.24	36.03
9	Air France	350 734	1.31	346 401	1.14	–1.24
10	British Airways	221 965	0.83	267 218	0.88	20.39
11	Air Berlin	313 036	1.17	239 688	0.79	–23.43
12	Swiss International Air Lines	209 205	0.78	225 849	0.75	8.57
13	Emirates	172 423	0.65	225 849	0.74	30.99
14	Finnair	166 588	0.62	186 464	0.68	14.81
15	Aeroflot-Russian Airlines	161 963	0.61	180 078	0.61	11.93
	LCC**	16 030 865	60.04	18 026 072	59.22	26.39
	TOTAL	26 698 345		30 441 365		14.31

Source: (www.ulc.gov.pl, Accessed 30 March 2018)

The increase in the market share of low-cost carriers (LCC – Low Cost Carriers) is noticeable. Since 2007, this share has fluctuated around 50% and had a downward trend until 2012 (47%) to reach 59% in 2016. The increased share of low-cost carriers results primarily from the increased offer of services provided by Ryanair, Wizz

Air, and Norwegian Air Shuttle as well as easyJet. The share of low-cost carriers in 2007–2016 is shown in the Figure 2.

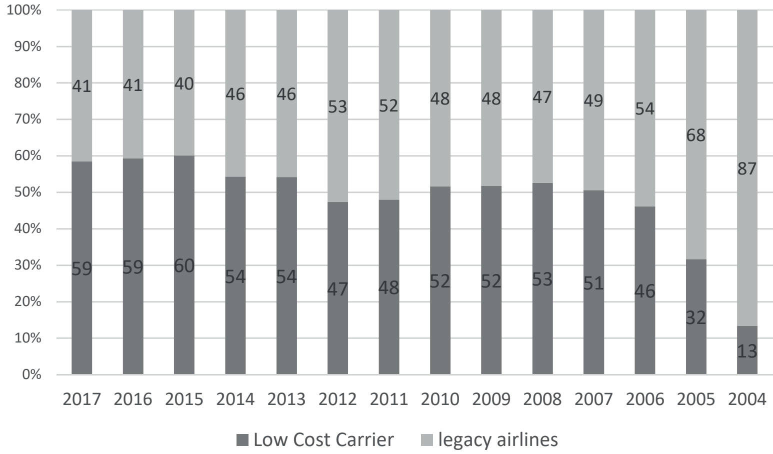


Figure 2. The share of low-cost and traditional carriers in passenger services on the Polish market of air services in 2007–2017
Source: (Civil Aviation Authority)

Carriers operating in the Polish market adapt services to the needs and preferences of travellers, but do not conduct any research in this field. The offer of low-cost carriers every year becomes more attractive for travellers. Wizz Air has also expanded its offer, in particular, in several of its base ports in Gdańsk, Warsaw and Katowice. At the same time, low-cost air operators effectively used air transport, air traffic dynamics was greater than the increase in the number of flight operations. The specificity of low-cost transports are connections implemented in the point-to-point system.

A 60% share of low-cost carriers in regular air transport in general led to the inevitable tightening of competition with traditional operators. This confrontation showed greater effectiveness of LCC activity in comparison with traditional bidders. The dynamics of low-cost transport growth in Poland in 2004–2016 is shown in Figure 3.

In the period 2004–2016, every year low-cost carriers carry more and more passengers, but the dynamics of growth is very stable. In the near future, we can expect a dual structure of the low-cost market (Ryanair and Wizz Air). The oligopolistic structure of the LCC market leads to the division of destinations served by LCC, while competing with traditional carriers. In the majority of analyzed airports there were two low-cost carriers, mostly Wizz Air and Ryanair. Only in Gdansk and Warsaw in 2016 operated three carriers (Wizz Air, Ryanair and Norwegian). The analysis of the low-cost transport market at selected Polish airports is presented in the tables.

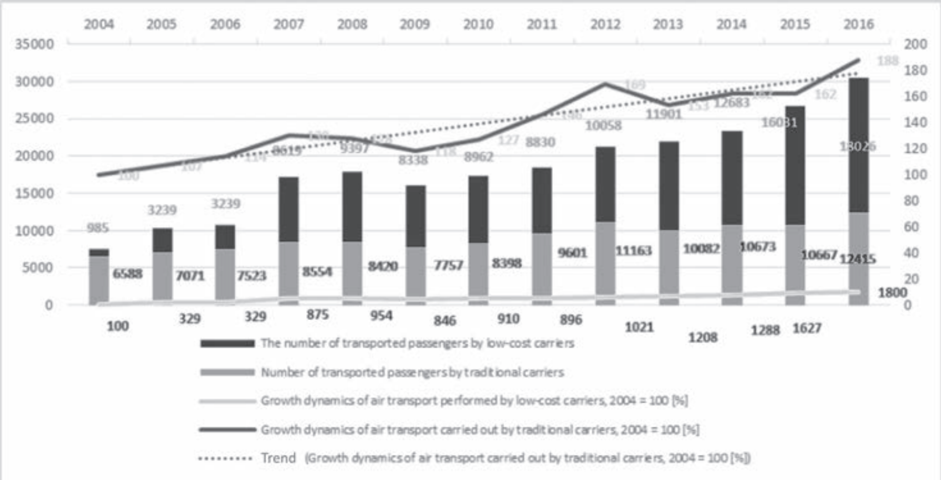


Figure 3. The dynamics of low-cost transport growth in Poland in 2004–2016
Source: (Civil Aviation Authority)

Table 2. Number of passengers served by low-cost carriers at selected Polish airports in 2010–2016

Airport	Number of low-cost carriers	2010	2011	2012	2013	2014	2015	2016
Gdańsk	3	1 448 303	1 548 530	1 628 780	1 875 293	2 193 374	2 754 212	2 984 698
Katowice	2	1 503 614	1 496 694	1 525 377	1 611 165	1 527 695	1 817 214	1 944 017
Lublin	2	–	–	5573	176 897	144 663	237 376	358 806
Olsztyn	2	–	–	–	–	–	–	28 680
Poznań	2	735 346	713 587	806 112	734 754	705 572	789 329	954 294
Szczecin	2	125 138	142 781	170 173	225 563	202 275	331 242	366 105
Warszawa	3	1 370 044	1 218 204	905 232	2 409 785	1 764 853	2 342 833	2 656 333
Wrocław	2	968 094	924 608	1 048 598	1115661	1 198 139	1 478 095	1 606 932
Total	–	8 827 920	8 844 626	10 162 050	12 065 331	12 899 363	16 237 720	18 165 950

Source: (Civil Aviation Authority)

Most passengers using low-cost carriers were served in Krakow in 2016 at 3.5 million, Gdańsk at 3 million, Modlin at 2.9 million and at Chopin Airport in Warsaw – 2.8 million, i.e. at the largest regional airports and at the central airport. At airports in Gdansk and Warsaw, the dominating low-cost carrier is Hungarian Wizz Air.

In 2016, the largest share in the service of passengers traveling with the LCC carrier had ports in Krakow, Warsaw and Katowice, as well as in Gdańsk. Kraków Airport was excluded from the analysis due to the lack of operations performed by Wizz Air.

Table 3. Share of selected airports in handling low-cost transport in 2010–2016

Airport	2010	2 011	2 012	2013	2014	2015	2016
Gdańsk	16.41	17.51	16.03	15.54	17.00	16.96	16.43
Katowice	17.03	16.92	15.01	13.35	11.84	11.19	10.70
Lublin	–	–	0.05	1.47	1.12	1.46	1.98
Olsztyn	–	–	–	–	–	–	0.16
Poznań	8.33	8.07	7.93	6.09	5.47	4.86	5.25
Szczecin	1.42	1.61	1.67	1.87	1.57	2.04	2.02
Warszawa	15.52	13.77	8.91	19.97	13.68	14.43	14.62
Wrocław	10.97	10.45	10.32	9.25	9.29	9.10	8.85
Share of LCC airports	43.13	40.74	41.59	48.29	46.61	53.43	53.49

Source: (Civil Aviation Authority)

In 2016, the largest share of LCC services in the air traffic structure of the airports in which Wizz Air operates was recorded in Lublin, Szczecin and Gdańsk.

Table 4. The share of low-cost transport in the operation of selected airports in 2010–2016

Airport	2010	2011	2012	2013	2014	2015	2016
Gdańsk	65.57	63.21	56.92	66.35	67.74	74.91	75.30
Katowice	63.54	59.84	60.57	64.27	57.25	59.70	60.99
Lublin	–	–	97,82	93.73	78.25	89.89	95.24
Olsztyn	–	–	–	–	–	–	69.79
Poznań	53.15	50.05	51.66	55.27	49.58	53.43	56.51
Szczecin	46.60	55.29	49.03	69.98	70.63	80.37	78.57
Warszawa	15.81	13.07	9.46	22.58	16.69	20.94	20.77
Wrocław	60.56	57.56	54.00	59.56	58.89	65.14	67.78
Total	43.13	40.74	41.59	48.29	46.61	53.43	53.49

Źródło: (Civil Aviation Authority)

In turn, the largest increase in LCC services was reported in Lublin 51%. Other airports in the LCC service segment recorded a decline in the number of passengers served.

Table 5. Dynamics of low-cost transport at selected airports in 2010–2016

Airport	2010	2011	2012	2013	2014	2015	2016
Gdańsk	22.47	6.92	5.18	15.13	16.96	25.57	8.37
Katowice	–5.01	–0.46	1.92	5.62	–5.18	18.95	6.98
Lublin	–	–	–	3074.18	–18.22	64.09	51.16
Olsztyn	–	–	–	–	–	–	100.00
Poznań	10.53	–296	12.97	–8.85	–3.97	11.87	20.90
Szczecin	–15.69	1410	19.18	32.55	–10.32	63.76	10.52
Warszawa	–14.44	–1108	–25.69	166.21	–26.76	32.75	13.38
Wrocław	30.38	–449	13.41	6.40	7.39	23.37	8.72
Total	6.89	019	14.90	18.73	6.91	25.88	11.88

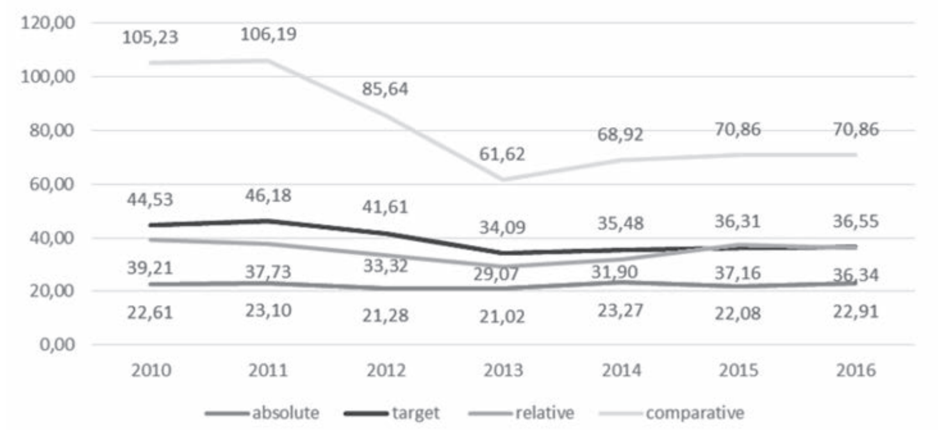
Source: (Civil Aviation Authority)

The presented statistical data show that on the Polish market of air transport services in the low-cost transport segment there are competitive processes between LCC carriers and traditional ones as well as intra-branch ones. The analysis of competitive processes along with the company's offer taking into account the resources possessed will affect the competitive position of Wizz Air.

Analysis of the competitive position of the Wizz Air carrier

The largest low-cost carriers operating on the Polish market are: Wizzair, Ryanair, easyJet, Norwegian Air Shuttle. The operational results are presented in the table.

Market share is the basic measure of the market position of the carrier when compared to the competitors. Economic literature distinguishes several market share indicators (more broadly: Kozielski, 2006). These indicators determine the number of passengers transported in relation to the entire market or selected segments (Figure 4).



The indicators are a reflection of the cleared passengers in relation to:

- total number of transported passengers – absolute
- number of passengers transported by all LCC carriers – target
- the three largest competitors (LOT, Ryanair and Lufthansa) – relative
- the largest competitor (Ryanair) – comparative

Figure 4. Wizz Air market shares in 2010-2016
Source: (Civil Aviation Authority)

By 2013, the number of passengers transported was smaller compared to the entire Polish market in the target segment, compared to the three and the largest competitor. Since 2013, an increase in market share relative to the largest competitor – Ryanair – has been observed, the target market share (LCC) ratio and the indicator for the three largest competitors also increased. In turn, the absolute index has a stabilized tendency.

Another indicator is the fleet. In the case of airplanes, the number of aircraft operating in Poland cannot be unambiguously determined due to the way the air fleet is managed. Carriers carrying out revenue management adjust and maximize technical and operational capabilities to market requirements. Available data show the total number of fleet of selected carriers operating in Poland.

Table 6. The fleet of the largest carriers operating in Poland

Air carrier	Type of plane	Number	Average age	Capacity	Total supply
Wizz Air	Airbus A320,	64	6.3	180	17270
	Airbus A321	25	1.3	230	
Ryanair	Boeing B737	432	6.8	189	81648
Polish Airlines LOT	Boeing B737 – 400	3	21	162	6484
	Boeing B737 – 800	4	13.0	186	
	Boeing B737 Max	2	0.4	186	
	Boeing B787 Dreamliner	9	3.5	252/294	
	DHC-8 Dash 8	10	5.6	78	
	Embraer ERJ 170	16	11.0	70	
	Embraer ERJ 195	6	6.3	112	

Source: (www.planespotters.net, accessed 28 March 2018)

The analyzed carrier has a fleet of over 89 aircraft of one type Airbus A320 / 321, offering over 17,000 seats. Direct competitors operating in Poland have either a fleet of one type, which is characteristic for LCC carriers (Ryanair offers more than 81,000 seats) or a different fleet (characteristic for traditional carriers (legacy carriers)). The analysis of the number of aircraft and the available number of seats determined in this way must be linked to the offered network of connections.

Table 7. Supply of Wizz Air carrier services from particular airports on a weekly basis

Airport	Number of connections per week / total number of connections per week	Number of destinations	Destinations
Gdańsk	124/331	34	Wilno, Kijów, Lwów, Wiedeń, Mediolan-Bergamo, Barcelona, Lizbona, Paryż, Frankfurt-Hahn, Hamburg, Kolonia, Dortmund, Eindhoven, Groningen, Reykjavik, Londyn, Liverpool, Doncaster-Sheffield, Glasgow, Aberdeen, Billund, Malmo, Molde, Tromso, Trondheim, Bergen, Hagesund, Kristiansand, Oslo–Torp, Stavanger, Alesund, Goteborg, Stockholm-Skavsta, Turku
Katowice	125/216	44	Burgas, Split, Larnaka, Ateny, Kutaisi, Barcelona, Lanzarote, Malaga, Teneryfa, Eindhoven, Reykjavik, Eilat, TelAwiw, Malta, Agadir, Podgorica, Dortmund, Frankfurt-Hanh, Kolonia, Memmingen, Bergen, Oslo-Torp, Stavanger, Faro, Lizbona, Porto, Malmo, Stockholm-Skavsta, Charkow, Kijów, Lwów, Bristol, Doncaster-Sheffield, Glasgow, Liverpool, London, Alghero, Bari, Bolonia, Katania, Mediolan-Bergamo, Neapol, Rzym, Dubaj

Airport	Number of connections per week / total number of connections per week	Number of destinations	Destinations
Lublin	31/46	8	Eindhoven, Tel Awiw, Oslo-Torp, Stockholm-Skavsta, Kijów, Doncaster-Sheffield, Liverpool, Londyn
Olsztyn	4/11	2	Dortmund, London
Poznań	35/159	12	Paryż, Barcelona, Eindhoven, Reykjavik, Dortmund, Oslo-Torp, Malmo, Stockholm-Skavsta, Kijów, Birmingham, Doncaster-Sheffield, London
Szczecin	10/40	4	Bergen, Oslo-Torp, Stavanger, Stockholm-Skavsta
Warszawa	162/1532	38	Bruksela, Burgas, Split, Larnaka, Billund, Bordeaux, Grenoble, Lyon, Nicea, Korfu, Kutaisi, Alicante, Barcelona, Santander, Eindhoven, Reykjavik, Eilat, Tel Awiw, Wilno, Malta, Agadir, Pogorica, Bergen, Oslo-Torp, Lizbona, Porto, Bukarest, Bazylea, Goteborg, Malmo, Stockholm-Skavsta, Bratysława, Kijów, Aberdeen, Birmingham, Doncaster-Sheffield, Liverpool, Londyn
Wrocław	42/232	16	Kutaisi, Eindhoven, Reykjavik, Agadir, Dortmund, Oslo-Torp, Porto, Bazylea, Goteborg, Stockholm-Skavsta, Kijów, Lwów, Birmingham, Doncaster-Sheffield, Londyn, Bari

Source: (www.wizzair.com, Accessed 31 March 2018)

Wizz Air has a dominant share in airports in Gdańsk – 37%, Katowice – 57%, Lublin – 67% of offered connections. In contrast, Ryanair has a small, decisive share in Wrocław, Szczecin, Poznań and Olsztyn. In Warsaw, the share is 10% due to the large number of carriers – 33.

Table 8. The network of flight connections and the available number of seats on selected air connections

Connection	Carrier	Number of connections per week	Number of seats offered
Gdańsk – London	Wizz Air	19	4120
	Ryanair	11	1980
Gdańsk – Oslo	Wizz Air	9	1970
	Ryanair	6	1134
Gdańsk – Stockholm	Wizz Air	10	2000
	Ryanair	6	1134
Gdańsk – Liverpool	Wizz Air	3	540
Gdańsk – Manchester	Ryanair	2	378
Katowice – London	Wizz Air	21	4480
	Ryanair	7	1323
Wrocław – London	Wizz Air	10	1800
	Ryanair	12	2268

Connection	Carrier	Number of connections per week	Number of seats offered
Warsaw – London	Wizz Air	25	5200
	Ryanair (Modlin)	25	4725
	British Airways	18	3186
	LOT	20	5040

Source: (www.wizzair.com, www.ryanair.com, www.lot.com, www.ba.com, Accessed 26 March 2018)

In case of connections to the same destinations and regions, Wizz Air's competitive advantage on the routes from Gdańsk and Katowice can be indicated, while on the routes from Wrocław and Warsaw, the Hungarian carrier does not have a competitive advantage.

Conclusions

On the basis of the conducted research, several conclusions can be drawn:

- Wizz Air's competitive position should be assessed as high, in 2016 it took a high third place in the classification of carriers operating in Poland,
- Ryanair is the main competitor for Wizz Air on the Polish market of air transport services. It is still necessary to indicate the competition of other carriers offering direct connections, e.g. from Warsaw and carriers offering connection connections in hub ports,
- in the years 2010–2016 Wizz Air lost the competitive struggle with Ryanair, its share until 2013 was reduced, to later stabilize,
- the profit per 1 passenger for Wizz Air was similar to Ryanair and much higher than Norwegian or easyJet,
- the load factor ratio was lower than the main competitors (82%), Ryanair reached 95%, easyJet 92%,
- Wizz Air compared to Ryanair offers a similar network of connections. In the case of ports in Gdańsk and Katowice, the dominance and high share of Wizz in passenger service is noticable. Also, the network of connections from these ports is very developed compared to other competitors. Wizz Air has a 67% share in Lublin, 37% in Gdańsk and 57% in Katowice.

Based on the conducted research, guidelines can be formulated to maintain the high position of the Hungarian carrier on the Polish market of air transport services:

- development of the connection network in the east direction,
- further development of bases in Katowice, Warsaw and Gdańsk,
- using the entire composition of marketing instruments in the process of managing the transport service.

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