低成本航空运输发展的障碍及解决途径

The Barrier and Solution of the Development of Low-cost Air Transportation

2013.11.

背景：

- 全球经济发展缓慢
- 国内航空市场潜力凸显—13亿人口，年人均乘机不足1次
- 航空公司运力过剩
- 低成本航空公司引发新热—吉祥航空、西部航空改走低成本路线
- 低成本航空公司规模小、发展缓慢

➢ **低成本航空大行其道还缺什么？**

Under the situation that the global economy is slumping into a low ebb and the recovery is slow, Chinese airlines have been gradually targeting back to domestic markets and began to reckon how to make much money from the domestic market. A common and actual status of airlines is excess aircraft capacity. However, for a country with 1.3 billion of population, it is less than 1 time per capita to travel by air. The whole aviation industry is puzzling over how to stimulate the consumer demand. A great number of service-oriented airlines is trying low-cost transportation. Only in this year, West Air and Juneyao Airlines successively turned to take a low-cost line. Due to the special external situation of China's civil aviation sector, the low-cost air transportation has long been developing quite slowly. Either the size of these airlines or their market shares are quite small. What does the lost-cost lack of for its success? Next, I would like to discuss with you about my thinking about the solution for the development barriers of low cost air transportation in the view of an airport authority.

一、国内低成本航空的运营现状
The operational status of domestic low-cost air transportation

一、国内低成本航空的运营现状

低成本航空公司原则：“低成本、低票价换取大市场”

理论上讲，低成本航空公司的进入，可以有效降低当地的机票价格水平，撬动潜在消费群体，助推当地机场旅客吞吐量的增长。

西安机场在运营低成本航空公司：春秋航空、西部航空、亚洲航空

◆The operational status of domestic low-cost air transportation

Low-cost airlines popularly pursue the business principle of using low cost and low ticket price in exchange of bigger market and realize sustained profit by efficient management and low-cost operations. Theoretically speaking, the joining of low cost airlines to a market is conducive to reduce the local air ticket price level, attracting potential consumers and benefits the growth of local airport passenger throughputs. Viewing the operational status of the three international and domestic low-cost airlines operated at XXIA, there is still a gap existing to the expectation of both parties.

（一）对机场业务量的拉动有限。

2012年，春秋、西部在咸阳机场的旅客份额为1.9%，低于整个低成本航空在我国3.5%的市场份额。亚洲航空于2012年11月进入西安市场开通曼谷-西安航线，航班量和旅客量占机场国际业务的比重分别是9.6%和13.4%。总体来看，三家低成本航空公司占咸阳机场总旅客量的近3.4%，拉动作用有限。

Firstly, they have a limited contribution to the traffic volume of the airport.

In 2012, the market share of Spring Airlines and West Air in XXIA is 1.9%, lower than 3.5% of the market share of all low-cost airlines in China. Air Asia entered into Xi’an in November of 2012 by opening Bangkok to Xi’an Route. Its flights and passengers’ number account for 9.6% and 13.4% respectively of the airport international business. Generally speaking, the passenger volume of these three airlines accounts for 3.4% of the total passenger volume of XXIA and they play a limited role in driving passenger volume.

2012年低成本航空公司市场份额
Market Shares of Low-cost Airlines in 2012

航空公司Airlnes	航班量 Flight Volume	份额 Market Shares	同比 YOY	客运量 PAXs	份额 Market Shares	同比 YOY
春秋航空Spring Airlines	1851	0.9%	持平 Same	316910	1.4%	+0.1%
西部航空West Air	767	0.4%	持平 Same	111406	0.5%	持平 Same

（二）对机场直接收益的贡献无差异

民航局政策：低成本航空可获得20%-30%的机场旅客服务费及安检服务费的优惠。

举例：A320执飞同一航线，低成本航空公司95%以上的客座率与全服务型航空公司72%的客座率支付给机场的费用是相同的。

Secondly, they are not special in direct income contributed to XXIA

Pursuant to Circular of CAAC on Relevant Issues of Preference of Passenger Service Fee of Civil Airports (MINHANGFA[2008] No. 45). Low-cost airlines can get 20% to 30% discount of airport passenger fee and security check fee. Taking A320 as an example, under the circumstance of flying the same route, the low-cost airlines with 95% of load factor and ordinary airlines with 72% of load factor pay the same charges to the airport. Viewing from the statistic data of XXIA, currently, the average load factor of other airlines which operate the same routes with low-cost airlines exceeds 72%. Hence, they contribute the same direct revenue to the airport.

2013年9月西安咸阳-上海虹桥航线业务数据
Traffic Data of Route Xi'an to Shanghai Hongqiao in September of 2013

航空公司 Airlines	航段 Air Route	架次 ATM	比重 Ratio	旅客 PAXs	比重 Ratio	货邮 Cargo& Mail	客座率 Load Factor
合计The Total		233	1.2	35086	1.5	335.5	91.6%
春秋 Spring Airlines	西安咸阳-上海虹桥 XXIA to Shanghai Hongqiao	57	24.5	9749	27.8	17.3	95%
东航 China Eastern	西安咸阳-上海虹桥XXIA to Shanghai Hongqiao	86	36.9	12463	35.5	96.3	92.2%
上航 Shanghai Airlines	西安咸阳-上海虹桥XXIA to Shanghai Hongqiao	23	9.9	3356	9.6	22.7	86.8%
吉祥 Juneyao Airlines	西安咸阳-上海虹桥XXIA to Shanghai Hongqiao	58	24.9	8368	23.9	190.7	90.7%

（三）低成本航空的运营特点尚未体现

从国外运营情况看，低成本航空公司在中短途尤其是支线运输中优势显著，但据目前运营情况看，暂不能发挥优势起到拓展航线网络目的

thirdly， Viewing the international experiences, low-cost airlines have advantages in short distance transportation. In particular, it plays an irreplaceable role in the operations of spoke airports. The information published by CAAC shows that, in 2012, there are 122 airports with passenger volume less than 1 million among 180 navigable airports in China, and low-cost airlines enter to operate at only 4 of them. The same situation also happens in XXIA. All air routes operated by low-cost airlines are matured air routes, and thus, they are unable to help XXIA to expand its air route network.

2012年机场总数：180个 → 业务量低于100万人次机场：122个 → 低成本航空公司运营机场：4个

西安机场低成本航空公司运营航线
Air Routes of Low-cost Airlines in XXIA

航空公司 Airlines	运营航线 Air Routes	该航线运营公司总数 Number of Airlines Operating This Air Route	航线日航班量 Daily Flight Volume of This Route
春秋航空 Spring Airlines	虹桥—西安—虹桥 Hongqiao-Xi'an-Hongqiao	4	16班 16 flights
	沈阳—西安—沈阳 Shenyang-Xi'an-Shenyang	6	14班 14 flights
西部航空 West Air	重庆—西安—重庆 Chongqin-Xi'an-Chongqin	8	20班 20 flights
亚洲航空 Air Asia	曼谷-西安-曼谷 Bangkok-Xi'an-Bangkok	3	2班 2 flights

二、低成本航空的发展瓶颈
The bottlenecks of the development of low-cost air Transportation

（一）价格管控之囧→价格调节市场的优势不能完全发挥作用

我国现行管理体制：1、航空公司在一定范围内拥有自主定价的权力
2、机场收费由政府定价，并且与客户的议价能力弱

低成本航空公司需求	
客源充足成熟航线	收费减免
差异化服务	优质时刻资源

VS

机场需求	
提高机场运行效率效率	提高低谷时刻利用率
缓解高峰压力	开辟新航点

(1)Embarrassed for pricing control

Viewing from the existing management system, Chinese airlines have the right of independent pricing within certain ranges. However, the airport charges are completely priced by the government, and thus, Chinese airports have disadvantages in negotiating prices with clients

On one hand, because big airports have matured and their passenger sources and revenues are ensured, low-cost airlines can get higher load factors with lower ticket price. In addition, they can also enjoy preferences for airport charges. With ensured income, those airlines have passion in investing more. On the other hand, limited slots and high pressure on airport resources in peak season are popular in big airports. Under the same circumstances that the low-cost airlines share the same airport facilities with other common airlines, airports still have to give discount airport charges to them. Airports wish that airlines can improve the utilization of non-golden slots and open new air routes. This is hard to be recognized by airlines. In addition, the increasing pressure on airport capacity during the peak season makes airports continue to expand, this leads to capital pressures on the airports.

Due to the aforesaid reasons, the current situation is that big airports have less passion on low-cost airlines entry to operate the existing air routes. Medium and small sized airports have passion but low-cost airlines have no interest. The advantage of price regulation of market fails to play full role.

（二）资源效率之痛→资源瓶颈制约飞机利用率的提高

航空公司盈利前提：较高的飞机利用率、充足的客源、优质时刻资源

机场资源现状：大型机场时刻紧缺、保障资源紧张，难以满足低成本航空公司专用安检通道、固定廊桥等要求，加之空中管制、地面滑行时间长等因素，快速过站难以保证。

2.Pain in efficiency of aviation resources

The important premises for the airlines to achieve profit are efficient use of aircrafts, air routes with sufficient passenger sources and slot support. Nevertheless, almost all the domestic airports with annual passenger volume over 10 million are lack of slot resources to some extent. For the newly developing and small scaled low-cost airlines, they have occupied limited slot resource sand their competition with large scaled backbone airlines for golden slots is becoming much fiercer. Those airports with sufficient slot resources have limited market support. “There are no slots for profitable air routes and no profit for non-profitable air routes” is the reflection of the present situation, which makes it harder for low-cost airlines to achieve high aircraft utilization ratio.

In addition, as the large-scaled hub airports have stress on airport resources, they cannot satisfy the low-cost airlines’ requirements like exclusive security checkpoints and fixed boarding bridges. Moreover, other factors of strict air traffic control, long taxiing time and the like, cannot ensure a quick transit service for the low-cost airlines.

（三）认知缺乏之殇

作为舶来品，普通民众对低成本航空的认知可谓少之又少，并且还随着地域边缘化递减，比如三四线城市的人相对一二线城市更缺乏对低成本航空的了解，部分乘坐过低成本航空公司的旅客往往对其提供的差异化服务也不认可。

同时，由于低成本航空主要依靠自营网络平台开展客票销售，这对于早已习惯电话订票、送票上门付款的旅客和不会使用电子商务的中老年旅客来说需要时间转变认知。低成本航空的覆盖市场有待进一步扩大。

3. Hidden danger of lack of recognition

As an exotic newly entry into China, the general public has poor knowledge about low-cost air transportation. The people's recognition is decreasing and lessening with the geographic locations. For example, the people in the third-tier and fourth-tier cities have less knowledge than the people in the first-tier and second-tier cities. Some people, who have ever taken the flights of low-cost airlines, usually cannot recognize the different service provided.
Meanwhile, low-cost airlines mainly rely on their own internet ticketing system. It needs some time to change the conception of the passengers who have been used to telephone booking and paying upon door-to-door ticket delivery and the elder passengers who cannot use e-commerce as well. The market of low-cost air transportation needs to be further expanded.

（四）网络缺失之困

与国外成熟的航空市场不同的是，我国除北京、上海外全是一城市一机场，即便多航站楼运行的机场，也很少考虑为低成本航空的运营改造或者专设航站楼。我国机场的等级和数量也使得航空公司不能象国外低成本航空公司一样根据经营策略选择不同收费标准的机场。且机场总量不足，我国按国土面积计算的民用机场密度约为每万平方公里2.5个，美国、英国分别达到每万平方公里5.9个和5.7个。机场总量不足难以形成网络的规模效益，成本的降低受到了限制。

4.Difficulties in lack of network

Compare with the matured aviation market in the world, the actual situation in China is that: one airport serves one city except for Beijing and Shanghai cities. We seldom consider reconstructing or building a dedicated terminal for low-cost airlines even in airports with multiple terminal buildings. The airport categories and quantities in China do not allow aircraft carriers like the foreign low-cost airlines to select airports with different service charging standards based on their own business strategies. In addition, the total number of airports is not sufficient. The density of civil airports in China is 2.5 airports per 10000 square kilometers. However, in the Unites States and England, there are 5.9 airports per every 10000 square kilometers and 5.7 airports per 10000 square kilometers respectively. Due to the small quantity of airports, it’s hard to get scale efficiency through network and cost control is restrained.

三、解决低成本航空发展难题的几点思路

III.Some ideas on resolving the development puzzle of low cost airlines.

根据中投顾问的相关研究报告显示，2010年中国高铁和公路运输旅客140亿人次，按照其中20%的高消费旅客转化为30%的低成本航空旅客计算，一年有8.4亿人次的潜在客户，中国巨大的市场潜力已成为全球低成本航空公司的焦点。此前，我国民航主管部门已出台支持低成本航空发展的若干政策，机场认为，还应在以下六个方面给予支持。

According to the relevant research report from CI Consulting, passenger throughput of Chinese high-speed train and highway is 14 billion. It is assumed that 20% of these passengers can be transferred into 30% of low cost airlines' passengers. There will be 840 million potential passengers. Such a huge potential market has caught the attention of global low cost airlines. Previously, China's civil aviation competent authority has published some policies of supporting low cost airlines' development, airports think, there should be more support given from the following 6 aspects:

1、提高市场化程度。政府为所有经营主体，机场、航空公司的良性发展搭建一个完全公平、开放的平台，放开价格管制，把议价、定价的权力交给市场，让市场决定适者生存。

1. Improve the marketization progress. The government shall provide an absolutely fair and open platform for benign development of all the business entities including airports and airlines, relax price control, give the right of bargaining and pricing to the market, let the market to decide survival of the fittest.

2、加快空域开放。当前我国空域受管理体制、航路、放行间隔限制，航班流量大大降低，并且降低的航班流量具有乘数效应，致使航班过站时间无法缩短，飞机利用率难以提高。天空开放和新技术的引入不仅可以提高运行效率，也可以释放大量的时刻资源，这有助于低成本航空公司通过高频次的飞行实现盈利。

2. Speed up the opening of airspace. At present, Chinese airspace is restricted by the management system, air routes and release interval limitation. The flight flow decreased massively which has a multiplier effect, and it makes the transit time unable to be reduced and the aircraft utilization unable to be increased. Open of airspace and import of new technologies can not only improve the operational efficiency, but also release lots of slot resources. This will help the low cost airlines to achieve profitability by higher flight frequency.

3、清晰的战略定位。在民航局的总体规划下，低成本航空应尽快明确自己的发展思路，提早与目标机场沟通，争取获得当地机场的积极支持，尽可能在地面保障、收费减免方面形成共识，机场也可据此安排后续建设和资金，实现建设绿色、集约机场的目的。大型机场也可考虑将老旧航站楼改建成专供低成本航空使用的基地。

3. Clear strategic positioning. Under the master plan of CAAC, low cost airlines should clarify their development ideas, communicate with targeting airports, strive for getting support from local airports, try to reach common ground on aspects like ground handling and reduction or exemption of charges. The airports can then arrange their follow-up constructions and fund in order to realize the goal of constructing green and intensive airports. Big airports can also consider renovating the old terminals as base of low cost airlines.

4、打破计算机订座系统的行业垄断。美国有9个订座中心，而我国一直以来就一个，没有更多的选择。另外CRS费用也因处于相对垄断收费较高。航空公司虽可以选择自建系统，但是长远来看，放开准入限制才能更好的促进整个民航业的服务水平的提升。

4. Break the industrial monopoly of computer booking system. The United States has 9 seat booking center, but China had only one, no more choice. Moreover, charges of CRS expenses are also very high because of their relatively monopoly position. Airlines have the right to choose building up their own systems, but looking from a long run, we need to release access restrictions so as to better improve service level of the overall civil aviation industry.

5、营销、服务的多元化。从低成本航空公司的成功经验不难发现，销售渠道的渗透力越强，客货源的攫取能力也越强；服务产品的独特性、舒适性不仅拓宽了低成本航空公司的利润来源，也将改变旅客对低成本的概念，吸引时间敏感型的公商务旅客。渠道和跨界将成为航空公司保持盈利性、提升竞争力的新途径。

5. Diversification of marketing and services. It is not hard to find out from the successful experiences of low cost airlines, that the stronger of your marketing channel penetration to the market, the stronger of your ability for ingesting passengers and cargo. The uniqueness and comfort of service products can increase not only the profit sources of low cost airlines but also change the concept of our passengers to low cost airlines, and attract time-sensitive passengers like business travelers as well. Channels and crossover will become a new path for the airlines to keep in competitiveness and their profits.

6、政策支持。低成本航空公司低票价和高密度穿梭飞行的特点，对欠发达地区和支线机场的发展大有裨益，政府可以在此类航线的运营中给予航空公司更多优惠。并且在航空公司开通国际航线方面给予航权、时刻等政策支持。

6. Policy support. The feature of low cost airlines are low ticket price and high density of shuttle flights, which are benefit to the development of under developed areas and spoke airports. The government can provide more preferential policies to support the operations of this kind of routes, and more policy support on aviation right and slots to these airlines for opening international routes.

谢 谢

Thank you for your atention

西 安 欢 迎 您！

WELCOME TO XI’AN