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Charter airlines adapt to changes in holiday habits

16 August 2007

Summer may be a wash out in the UK, but across Europe temperatures are soaring. And as the holiday getaway gets into full swing, analysis by industry experts reveals just how much our holiday travel habits have changed in recent years.

As recently as a decade ago when it came to jetting off to Europe for some summer sun, the favoured choice for holidaying Brits was the charter airline. But the rise of the low-cost carriers has dramatically altered that picture, with many more travellers now choosing the low-cost option. Analysis by Ascend, the world's leading provider of information and consultancy to the global aerospace industry, shows just how far the charter airlines have had to change their businesses to survive.

According to Ascend the number of UK-based charter airlines has remained steady over the past 20 years (between eight and 10 airlines) but that collectively the airlines have successfully grown the number of aircraft they operate: from just 81 in 1987 to 202 in 2007.

The charter airlines' rate of growth is dwarfed, however, by that of the UK-based low-cost airlines. In 1997 there were just two low-cost operators with 19 aircraft between them. Today, 6 low-cost airlines operate more than 250 aircraft.

"The whole business model for charter airlines has come under tremendous pressure in the past decade," says Gehan Talwate, Managing Director, Ascend. "The charters have found business squeezed by the growth of low-cost carriers as well as by more aggressive pricing from the scheduled airlines. Not so long we were asking whether the charter airlines could survive at all. However, recently they seem to have come through the shock and are showing they can adapt to the new market conditions.

Ascend's analysis reveals that survival for the charter airlines has involved a measure of adaptation, consolidation and expansion.

On routes where low-cost carriers have expanded, charter carriers have increasingly adjusted their business models: allowing 'flight only' bookings, removing seven or 14 day stopover restrictions, and charging for 'frills' such as meals, seat allocation and baggage. They are concentrating their efforts on existing 'niche' routes not served by low-cost airlines, such as the Greek islands and Egypt.

Charters are also expanding and reorganising their long-haul routes, focusing on new destinations like Canada, Mexico, Goa in India and Cuba, and competing more aggressively with scheduled carriers by upgrading their service.

For example, First Choice now runs two-class cabins on its Boeing 767s, including a 'business class' section, and economy now features as much, if not more legroom than scheduled flights.

"We see the charter carriers continuing to develop their long-haul services," continues Talwate. "For example, both Monarch and First Choice have orders in for Boeing's new 787. Meanwhile the charters are placing very few orders for short-haul aircraft; so on short haul their businesses will increasingly resemble the low-cost carriers.

"As for the traditional charter format, we can see this surviving in the 'niche' markets; those holiday routes to the Greek islands, Egypt and the like. Here, competition for the charter airlines remains low: we are yet to see any penetration into these markets by the low-cost carriers, nor are we seeing any strong desire to do so, and they are simply not a core focus for the major scheduled airlines."

Changing face of the charter airlines – facts and figures

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Number of charter airlines:

1987: 8
1997: 10
2007: 8

Charter airline companies:

1987: Air Europe, Air 2000, Britannia Airways, British Air Tours, Inter European Airways, Monarch, Orion Airways, Paramount Airways
1997: Airtours, Air 2000, Airworld, Britannia Airways, Caledonian Airways, Flying Colours, Leisure International, Monarch, Peach Air, Sabre Airways
2007: Astraeus, First Choice Airways FlyJet, Monarch, MyTravel, Thomas Cook, Thomsonfly, XL Airways

Number of aircraft:

1987: 81
1997: 121
2007: 202

Flight only bookings?

1987: No
1997: Few
2007: Yes

Long haul?

1987: Few, multiple stops, single class, single aisle aircraft
1997: Yes, popular destinations include Orlando and the Caribbean
2007: Yes, new destinations include Canada, Mexico, Cuba, Goa, increased legroom, two-class cabins

Low-cost companies:

1987: None
1997: Ryanair, easyJet
2007: Ryanair, easyJet, Flybe, flyglobespan, bmibaby, Jet2

Number of aircraft:

1987: 0
1997: 19
2007: 250+

Aircraft orders:

1987: 0
1997: 0
2007: 300+

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