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How low-cost carriers are changing the growing East Asian travel market

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Introduction

The Asian air travel market has drastically changed over the past decade. Recent governmental changes, policy modifications, economic growth, and rising incomes have all contributed to air travel growth. But the growth in air travel is not limited to domestic trips, much of it is international as well. Much of the growth is attributed to the rise of low-cost carriers, which offer cheaper fares to access more potential customers, which in turn gets more people into the air. The percentage of passengers leaving Asia is growing as well, with 18% of Chinese air travelers leaving the continent in 2017. This accounts for Asian tourists leaving Asia to the US, Europe, and other destinations. Many of these destinations are leisure-oriented and tend to be in warmer climates (Chen, 2018). Domestic travel in Asia, primarily in the Chinese market given its numerous regional airports and destinations, grew 10% in 2017. In 2017, Sichuan Province received the highest number of domestic tourists by airplane, and its main Chengdu airport was the fourth-busiest in mainland China (Chinatravelnews.com, 2017). This tourism is heavily driven by the presence of popular Giant Panda breeding centers and preserves in the region, along with ancient towns, ski areas, and museums (Travel Sichuan, 2018). Much of the air service growth has been made possible by the main three state-carriers, Air China, China Eastern, and China Southern. However, smaller carriers such as Hainan Airlines, Sichuan Airlines, and XiamenAir are growing both domestically and internationally. Despite the increase in air travel trips and routes, China is not the only country where the monstrous growth is occurring.

In Malaysia, domestic travel continues to increase, despite concerns of low consumer spending, rising living costs, and low consumer sentiment. The Hong Leong Investment Bank research shows that the availability of low-cost carriers and growth in low-cost airline networks will contribute to an expected growth of 6%-8% for the year of 2018 (Star Media Group, 2018). The largest carrier in the country is AirAsia, a large low-cost carrier with Thai, Philippine, and Indonesian subsidiaries. AirAsia also provides long-haul services through its newer subsidiary, AirAsia X. AirAsia X is experiencing large growth in both low-cost short haul and long haul, with routes travelling as far west as Delhi, India and as far east as Auckland, New Zealand. Malaysia is home to the largest concentration of low-cost long-haul capacity in Asia, at 7% of available seats. Half of AirAsia X's traffic also connects to other flights provided by the group, which provides good reinforcement that the model is working (CAPA, 2017). As the third largest air travel market in Asia, it continues to grow despite bad publicity from the loss of two aircraft from the state carrier Malaysia Airlines.

In Indonesia, the nation is expected to become the fifth-largest air travel market by 2036, where it will see an expected 355 million passengers (Indonesiaexpat.biz, 2018). The market is expected to grow 6% annually for international travel between 2017 and 2021. Three-quarters of international passengers are inbound, with most arrivals from Singapore, followed by Malaysia, China, and Australia. Indonesia has the potential for large domestic growth due to its numerous islands and large expanse of the Indonesian archipelago, however the primary growth is coming from tourism as well as other international destinations. The Lion Group of Airlines are the most flown carriers in the country. Meanwhile, Lion Air is the predominant low-cost airline of Indonesia, along with its subsidiaries Batik Air and Wings Air (BCD Travel, 2018).

India has also seen explosive air travel growth. The growth rate of passenger traffic is expected to remain steady between 8% and 10% in 2018 and 2019. Major Indian Airports, such as New Delhi and Mumbai have seen passenger traffic increase by nearly 20% during both 2015 and 2016. Major Indian airports are also running at capacity or near capacity as governments try to expand them to continue the growth (The Economic Times, 2017). The largest carriers in the country are low-cost private airlines, with IndiGo carrying 38.2% of domestic travel, and Spice Jet carrying 13.8% of domestic passengers. The lone state-owned and flag carrier, Air India carries 13.5% of domestic traffic (Statista, 2017). Many private airlines in India, such as GoAir, Spice Jet, and Indigo, have dozens or even hundreds of jets on order, meaning that large expansion of networks and services is expected in the region within the next few years.

The Evolution of Low-Cost Carriers

As airlines grow to serve more markets, the focus has turned from how carriers can provide more destinations to their networks to how carriers can reach more and more customers. Many airlines turned to mergers and acquisitions, enhanced interline and codeshare networks, and more service to growing markets by utilizing smaller and more efficient aircraft to handle routes with longer distance, but thinner demand. These routes such as British Airway’s Nashville-London and Austin-London services and Japan Airline’s Dallas-Tokyo and Boston-Tokyo services could not have been made possible without the introduction of aircraft such as the Boeing 787, capable of handling smaller markets and travelling longer distances. Despite these market changes, the demand for lower ticket prices on the consumer side of aviation remained a concern.

In comparison to other airlines, the structure of low-cost carrier operations is very similar. Most of them utilize a single aircraft type or a small number of aircraft types which results in a small number of pilot classes, a smaller parts bin, and lower maintenance costs. For example, Southwest Airlines operates Boeing 737 NG and the newer Boeing 737 MAX aircraft. Philippine-based Cebu Pacific operates Airbus A320 and A321 aircraft along with high-density Airbus A330 aircraft. This single manufacturer fleet type also contributes to lower maintenance and operating costs. Low-cost carriers generally fly out of airports that have lower landing, slot, and gate leasing costs as well. For example, in Bangkok, many low-cost carriers opt for the smaller airport in the region, Don Mueang International Airport, which in 2015 was the world's largest low-cost carrier airport after it experienced a staggering 50% increase in traffic between 2014 and 2015 (CAPA, 2017).

Low-cost airlines typically run high-density configuration aircraft in their fleets in order to maximize potential seat sales and profitability. In the Airbus A320, a non-low-cost carrier, Philippine Airlines runs the A320 with 156 seats total, with 12 in first class and A321s with 199 seats having 12 in first class (Philippine Airlines, n.d.) The low-cost carrier in the region, Cebu Pacific, runs A320s with a total of 180 seats, while they configure the larger A321 with 230 seats (TripAdvisor, n.d.). In this configuration, the low-cost carrier sells 15.3% more seats in the A320 and 15.5% more seats in the A321. Assuming crew, fuel, and aircraft costs are the same, an airline can realize more revenue if it sold seats in a similar price range to the less dense seat price. However, the low cost-carrier will also have lower pilot and crew pay. Many low-cost carrier pilots are not in unions, and much of the grounds crew as well as airport agents and representatives are hired on a contract basis. Many low-cost carriers do not operate airport lounges, which allows them to avoid a major rent or lease cost to cater to high-status or 'frequent-flier' passengers. These reduce costs which allow carriers to focus more on the aircraft that will move their passengers. Most of these aircraft are leased, which allows the airline to use existing cashflow to pay for the aircraft and avoids the high capital cost that comes with purchasing an aircraft. Low-cost carriers in many cases have fewer interline agreements or codeshares. This means that they don't have to use the larger airports in order to connect them with their global partners, which is a trend that many non-low-cost carriers use. The primary goal of the low-cost carrier is to sell less-expensive tickets, fill seats, and get those who could not previously afford to fly into the air. As airlines sell less expensive tickets, they can access more potential passengers, moving down the economic pyramid. As a result, the business model has become popular seemingly everywhere.

High Density Routes in the Far East

East Asia, due to its close major cities and robust economies, has some of the busiest flight routes in the world. One of the more notable routes is from Seoul, South Korea to Jeju Island, South Korea. This route, which only takes just over an hour to complete, faces competition from seven different carriers and is flown approximately 100 times per day each way. Much of the service is provided by low-cost carriers, such as Jin Air, Eastar Jet, and Jeju Air. They provide dozens of services at the lowest fares between the two cities by utilizing high density narrow-body aircraft. The mainline carriers of South Korea, Korean Air and Asiana Airlines, operate services using both their wide-body long haul aircraft, as well as some larger narrow-body aircraft. Notably, Asiana operates a higher density regionally configured Boeing 767-300 to help serve the busier routes with shorter distances. Korean Air also offers widebody service on this route with regionally configured Airbus A330-300 and Boeing 777-300, along with others. All service to Jeju from Seoul is provided out of Seoul's Gimpo airport, a smaller airport east of Seoul's main Incheon Airport, which was built to replace Gimpo. This means that most airline service was moved to Incheon, and it let smaller low-cost carriers as well as other regional Asian carriers to keep their spaces at the airport.

The Seoul-Jeju route has a varying price structure. Service provided by smaller carriers and lower-cost carriers bottomed out near $64 USD for summer time round trips. The mainline carriers that serviced the route, Korean Air and Asiana Airlines, had fares hundreds of U.S. dollars higher than the low-cost carriers. Albeit, these carriers provided less service between the two cities and had several different classes of service onboard. Trips on these carriers to the island of Jeju averaged between $300 and $400 USD. The most expensive low-cost carrier round trip to the island ran near $130 USD (Google Flights, 2018). This does not take into account other fees that airlines may incur upon boarding or during the purchasing process. A comparison can be made to the LAX/SFO route in the United States, where as many as 45 daily departures to each city are made during the summer months. LAX and SFO are also only 50 miles further in distance from each other when compared to Seoul and Jeju Island. A vast majority of these trips are made by Delta Airlines, United Airlines, American Airlines, and Alaska Airlines. Delta utilizes smaller narrow body jets such as the Boeing 717 and 737, while American and United offer a mix of regional jets complemented with narrow body options as well. Occasionally, United will use a Boeing 787 variant on the route, presumably to position the aircraft between the two United hubs for long-haul service. Alaska uses A320s which were inherited from the Virgin America takeover, while the lone low-cost carrier on the route, Southwest Airlines uses their all Boeing 737 fleet. Southwest offers nine roundtrips daily during the summer season, with an average economy 'Wanna get away' fare of $80 USD. The most expensive trip of the day in the same fare class tops at $105 USD. Meanwhile, the non-low-cost segment offers over 40 departures each day in each direction, with an economy fare average of $230 USD, with the lowest being $113 USD and the highest at $369 USD (Google Flights, 2018). This is considerably higher than the low-cost market, keeping in mind the lowest Southwest fare class offers two free checked bags. What should be considered is that LAX and SFO have very close alternative airports such as BUR, SJC, OAK, and LGB, many of which have more service from low-cost airlines like JetBlue and Spirit Airlines. These routes such as LGB/SJC and BUR/OAK have much less total frequency and higher fares for economy passengers, and they often face no direct competition as neither airports are hubs for any non-low-cost airline. Nevertheless, the alternative airport options for LAX and SFO traffic are much greater than the Korean example, showing that the low-cost segment tends to thrive in these niche markets away from non-low-cost hub carriers. Meanwhile, non-low-cost carriers have a greater percentage of seats from LAX/SFO. Without the availability of alternative airports in the Seoul/Jeju Island route, the low-cost segment has taken the competition head on, and 57% of the traffic is flown by the low-cost segment (CAPA, 2017). Given Jeju Island's reputation as a leisure and beach destination, the low-cost segment can benefit from their aircraft with more economy seats, as this tends to give more travelers the opportunity to visit leisure destinations.

With alternative airports in mind, major cities will have a smaller and larger international airport to better serve airlines and customers. Shanghai follows this same initiative by having two international airports, Pudong and Hongqiao. Pudong is used as the primary airport open to all carriers from all parts of the world, while Hongqiao is used by Asian carriers exclusively. This also addresses the high demand for air travel in the region. The smaller airports, which are often the original airports of the city, can provide more service to routes where demand is very high, without creating more congestion at larger and busier international airports. Many low-cost carriers utilize these airports not only for congestion reasons, but also to avoid higher landing and air traffic fees that larger airports bear. However, since low cost carriers typically operate similar, larger narrow-body aircraft, they target larger markets in order to fill more seats.

The creation of sub-brands

As airlines find ways to grow in a competitive market, the creation of sub-brands by larger airlines has been seen as a way to enhance profitability and serve more customers. These sub-brands are usually low-cost carrier variants of the larger parent airline, with a slight difference in service. The creation of smaller subsidiaries allows airlines to use older or existing equipment to be rebranded and run in a denser seat configuration to accommodate more travel markets. The trend has become common in Europe, and now is becoming a greater influence on the Asian market. Sub-branding on this scale can be seen in Japan, where All-Nippon Airways and a Hong Kong investment firm recently spun off Peach, a low-cost carrier designed to give travelers more options to travel between Japan's largest cities and Korea, Hong Kong, and Taiwan along with other major destinations (ANA Holdings, n.d.). Garuda Indonesia has also created a sub-brand, known as Citilink. It is designed to serve more high volume domestic destinations within Indonesia and the rest of the archipelago along with several major Malaysian cities. Citilink operates their own narrow body aircraft that were not inherited from Garuda Indonesia and are a different brand than the narrow bodies operated by the parent company. Many European airlines already have sub-brands targeted at this market. Lufthansa is a parent company of the low-cost carrier, Eurowings, which provides service both continentally in Europe and long-haul as well. Most of the hubs for the carrier are found in Germany, in airports not dominated by Lufthansa such as Hamburg and Cologne/Bonn. There are some instances of direct competition between the subsidiaries for domestic German flights, but most of the routes operate without in-house competition. In the same region, KLM is the parent company of Transavia, a low-cost Dutch carrier that also has a French division as well. Examples of sub-branding in Europe are becoming more common, and some are often taking 'millennial' marketing and branding versions, such as Air France's 'Joon' carrier. This airline is focused however not on low-cost, but rather a more lifestyle centric brand focused on technology. This carrier flies to destinations more popular for millennials from Paris such as Cape Town, Mahé in the Seychelles, Barcelona, and Lisbon (Fitzmaurice, 2018). While the airline may not be a low-cost variant, it does differentiate with marketing and its product, taking an alternative approach to expanding the target market.

The new sub-brands are targeted at large leisure markets and travel markets. They use already busy routes so that they can compete with the low-cost carriers. This gives the non-low-cost carrier direct competition with its segment rivals. Most Asian sub-brands target these routes, even though their larger counterparts fly between the same cities, but many choose different airports. For example, Peach Air will fly from Tokyo to Seoul-Incheon instead of Seoul-Gimpo, because Peach does not want to cannibalize the All Nippon route from Tokyo to Gimpo Airport. The reason one route may also appeal differently to consumers is the airport locations, which may also factor purchasing decisions, albeit this may ignore whether the consumer chooses the larger or smaller airline. The structure of the sub-brand is different with Garuda Indonesia's Citilink, where many of the routes it flies from Jakarta are also directly competed on by the main airline. There is a notable price difference between the two carriers however when comparing the flights between the same airports side by side.

Sub-branding is a key move that airlines can make to maintain market share. Where competition rises in the low-cost sector, major airlines try to offer products such as basic economy or 'no-frills economy' to get lower budget travelers in the air, and to keep them with their airline, rather than losing them to low-cost competition. This may include regulating size of carry-on bags or no prior seat selection. Many of these services can be added back to the ticket booking with a cost. Differentiation is important with the creation of a sub-brand as customers may be confused (Carter, 2016). With a sub-brand, the cost per seat, fuel, and crew remain the same. This is the case if a sub-brand uses a non-low-cost configured airplane. A wholly owned low-cost subsidiary can help larger carriers maintain profitability and stabilize income if increased competition or an increase in low cost carrier service begin to undercut larger carrier load factors and revenues.

Hong Kong and Singapore

As natural hub and spoke cities, where all air traffic is international, Hong Kong and Singapore are also adapting to the explosion of low-cost carriers in Southeast Asia. Each of these airports are home to a variety of carriers, many of them low-cost as well as mainline. At Hong Kong's airport, Cathay Pacific, its regional outfit Cathay Dragon, Hong Kong Airlines, and low-cost carrier HK Express all operate to destinations both in mainland China and around the world. The airport, which was built in 1998, replaced the aging, overcrowded, and difficult to access Kai Tak airport (Hong Kong Airport Authority, 2018). It is one of the last major cities in Asia to not have a diversity of low-cost carriers. Now, the new Hong Kong airport is in need of a third runway, with its annual takeoffs and landings reaching its operational limits (Lee, 2017). Only one budget airline, HK Express, operates a Hong Kong hub. It is owned by HNA Group, the same parent company of Hainan Airlines, a private Chinese carrier. While it is a growing airline, many of the routes that it operates do not go to mainland China, and rather to countries such as South Korea, Japan, and Thailand (HK Express, 2018). The busiest air routes from Hong Kong, such as flights to Taipei and Shanghai Pudong are operated either entirely or almost entirely by non-low-cost carriers. Much of this can be attributed to infrastructure problems in Hong Kong. With a growing slot-problem and a more congested airport, airlines fear that getting access to Hong Kong airport will become more difficult until a third runway is installed (Lee, 2018). As an infrastructure problem keeps many new routes and flights out, it helps maintain a stronghold of legacy carriers in the city-state. The opening of a third runway may allow low-cost carriers such as HK Express to expand to more destinations from Hong Kong, creating more competition. Nevertheless, the airlines based in Hong Kong are aware of the competition that surrounds them in cities and airports nearby, and what the future may bring if the airport decides to grow.

Singapore, however, has many different low-cost carriers operating out of its Changi Airport. Jetstar Asia Airways, along with Scoot airlines and SilkAir, both of which are owned by Singapore Airlines, the flag carrier of the city-state. After recently merging regional rival Tigerair with Scoot Airways, the parent company airline looks to expand into more long-haul opportunities, such as in India and Europe in order to take on larger low-cost rivals in the region such as Jetstar and AirAsia. Scoot operates newer Boeing 787 aircraft along with Airbus A320s to accommodate various markets both regionally and in the long-haul sector. However, low-cost long-haul service has often come and gone, such as the Honolulu-Singapore route. Meanwhile, Scoot operates a Singapore-Berlin route, which is the longest route in their system. These carriers tend to have more success in the ‘medium-haul’ market in routes such as Singapore-Osaka and Singapore-Perth. While low-cost long haul does not have many service options, time will tell if it does become a real influence in the long-haul market.

Nevertheless, the product makes a big difference in the economics of low-cost long-haul service. Scoot sells its economy seats by offering the lowest price to purchase one seat. Scoot charges extra for a checked bag, and a little more for a checked bag and a meal (Scoot Tigerair Tpe, 2018). This allows customers with many budget options to fly, eliminating costs for consumers if they do not wish to buy a particular item or want less service. Most of Scoot’s planes are high density, and this is no difference with their long-haul enabling Boeing 787 fleet. The planes have nearly 300 economy seats, configured in a similar pitch and width of other 787s used around the world. The airline does not provide IFE screens, and uses recliner seats for its business class. The business class section of the Scoot 787 takes much less room than other carriers, enabling the airline to sell more seats, which in turn may bring more revenue. The decision of Singapore Airlines to be the parent company of Scoot was designed to reduce costs in a region where airline competition is only growing and to maximize the potential revenue of the airline with only one hub.

Conclusion

The growth of the low-cost and ultra-low-cost carrier in East Asia has attributed to a changing economic atmosphere of airlines in the region. More large mainline carriers are flying larger aircraft, creating sub-brands, and luring more passengers with newer economy products to adjust to the largest growing aviation market in the world. Lower cost carriers continue to grow, expanding into the lower economic pyramid, by offering cheaper fares and more destinations to lure new air travel customers. Natural hubs will change amidst the growth of airlines, as the barriers to entry for new carriers fall, current airlines will be challenged as the business model of commercial aviation adjusts to a change in networks. Newer and more fuel-efficient aircraft will contribute to larger growth, making 'long and skinny routes' more profitable and more accessible. Carriers will form new alliances in order to maximize market access and opportunities in areas unserved, by connecting long-haul passengers and short-haul passengers to access regional and local destinations. As low-cost long-haul becomes more common with airlines such as Scoot and AirAsia, current long-haul mainline carriers will adjust to the rise in traffic as more passengers will be able to travel longer distances. This will be ultimately be determined by the true demand for the low-cost long-haul market, and whether the demand can be high enough for service. As the dynamic of the airline industry constantly changes, airlines in East Asia will experience more competition as more and more passengers will be able to access the air.

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