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IM. STANISŁAWA LESZCZYCKIEGO
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TRANSPORT COMPANIES IN THE SERVICING OF ORGANISED TOURISM IN POLAND

MONOGRAFIE

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PRZEDSIĘBIORSTWA TRANSPORTOWE W OBSŁUDZE ZORGANIZOWANEGO RUCHU TURYSTYCZNEGO W POLSCE

WARSZAWA 2014

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TABLE OF CONTENTS

PREFACE

In historical terms, within the last 200 years or so, "an increase of service potential in transport and change of conditions of exploitation of rolling stock combined with technical and economic progress has created two important commercial problems for carriers: the first one – building up an effective sale network of transport services, and the second one – creation of an additional demand for travels. A way for solution of these problems has become a cooperation with entities of brokerage and organisation in tourism" (Konieczna-Domańska, 2008, p. 73).

Cooperation between carriers and tour operators[1] has a long history. The world's first tourist agencies, in affluent countries of Western Europe and in the United States, were established in the 19th century at large companies engaged in passenger transport, especially maritime shipping and railways (Konieczna-Domańska, 2008). Likewise in the inter-war period, the links between the transport sector (mainly rail) and travel agencies were very strong, particularly in such European countries as Italy, Austria and Germany. Meanwhile, the development of tourist agencies after WW2 headed in the twin directions of a widening of the tourist offer and specialisation. The latter relied, *i.a.* on an institutional division of organisational activity and brokerage. In turn, cooperation between organisers of tourism and carriers, this time in rail and air transport, has led to the creation of large tourist companies operating on an international scale, such as TUI – Touristik Union International (Konieczna-Domańska, 2008; Szymańska, 2009).

In Poland, it has been possible to observe tremendous development of tourist traffic (and a breakthrough in mobility overall) in the years since 1990, with the travel involved being both domestic and international. This development would not have been possible without a parallel increase in the carriage capacity of the transport companies serving the tour operators active on the Polish market. Amongst these there are domestic carriers (mainly operating coaches, but also aircraft) as well as foreign ones (above all in the air). Between the new kinds of

[1] Tour operator (otherwise: wholesaler) means a specialist enterprise involved in the comprehensive organisation of tourist services (usually in the form of a so-called package tour, package holiday, inclusive tour, arrangement, or package of travel) and taking responsibility for this product. In turn, a tourist agency or travel agency can join functions of the comprehensive organisation of travel with the provision of tourist services in the role of commodity broker (middleman), i.e. by also selling someone else's tourist events. Today operations in the role of agent or organiser of tourist events constitute two separate forms of service, as is confirmed in the legal system of the EU and in the Polish Act on tourist services of 29 August 1997 with later amendments (Dziennik Ustaw RP, 133, item 884 of 29 August 1997).

carriage services and the increase in the demand for them, there is a phenomenon of synergy present.

Existing Polish literature both economic and geographical has tended to focus either on transport, or on tourism. Despite an increase in the number of scientific papers in the relevant Polish literature, there remain no detailed works on cooperation between transport and tourism, this undoubtedly leaving the existing situation as an unsatisfactory one. Meanwhile, interdependences between transport and tourism are present on many levels, not least because transport is co-responsible for the development of tourism, while also joining it in the betterment of the organisation of tourist traffic, and – obviously – in the provision of tourist carriage (Prażanowski, 1980). This book is therefore devoted to the carriage companies involved in the service of organised (mass) tourist traffic in Poland, a subject that is relatively less well-known in our country. The work has been conceived, not only to describe the phenomena analysed, but also to make some methodological contribution to it.

"Although transportation services and rent-a-car companies are considered important, they are the least-mentioned items" in research (Scott *et al.*, 2008, p. 112). Meanwhile, transport is a basic component of tourism, providing for linkage between the original (source) area of tourist traffic and the destination. There are thus close relationships between the two areas of activity, and ones of a two-directional nature[2]. On the one hand, the good accessibility provided by transport services is of fundamental significance to the development of any tourist destination; while on the other hand, transport receives significant benefits from tourism, on account of the creation of additional demand that can be generated by this kind of travel (Graham *et al.*, 2008).

[2] Demand for transport therefore stimulates an increase in the supply of transport services, and – conversely – the growing supply of carriage opportunities enhances an incerase in demand for tourist carriages (Żebrak, 1997).

1. PURPOSE AND SCOPE OF THE BOOK

The subjects of this book are transport companies, Polish as well as foreign, involved in servicing organised (collective) tourist traffic in Poland. Tourist traffic embraces outbound tourism from Poland, inbound from abroad into Poland, and also domestic tourism. Moreover, the research embraces the largest tour operators on the market as of 2012 which are involved in the comprehensive organisation of travel, in that they offer organised package holidays.

The detailed research concerns one time cross-section, i.e. the second half of 2012 (as of 31 December 2012). A reconstruction of similarly detailed information for the whole population of transport companies and tour operators registered in Poland with national and foreign capital is practically impossible for earlier years. Nonetheless, wherever possible, we make reference to an earlier period.

The basic goals of this book are as follows:

(1) to better understand which transport companies (modes, means and firms) are involved in servicing organised Polish tourist traffic;
(2) to ensure greater familiarity with locations, and thus to make inferences regarding 'rules of distribution' of mutual connections between transport and carriage companies and the tour operators present on the Polish tourism market;
(3) to identify and comprehend the relationships between types of transport means used in servicing tourist traffic and types of tourist event;
(4) to infer generalisations regarding the cooperation ongoing between tour operators and carriers, especially the Polish transport companies (with particular attention being paid to the spatial aspects to the phenomena and processes described).

In the research we apply various measures with a view to characterising the tour operators (such as number of entities, number of customers served, numbers employed, turnover, etc.) as well as the carriers, especially air carriers (e.g. number of passengers served, size of fleet, the Polish tour operators served). In similar vein, detailed data have been collected on road carriers and tourist agencies cooperating with them.

The book consists of seven Chapters plus Conclusions. After a description of transport for tourism in the literature, Chapter 3 presents sources of information (gathering) of basic data and their processing. Also a wider background, *i.a.* on transport and tourist companies going bankrupt in the last several years is supplied. In Chapter 4, an in-depth analysis of the largest Polish tour operators is provided, as of 31 December 2012.

In Chapter 5, air carriers serving the Polish market are described. These are Polish as well as foreign airlines participating in scheduled and charter traffic. The latter especially serve organised tourist traffic almost exclusively, from and to Poland, therefore mirroring the flows of tourists in international connections very well. The collected data allow for the in-depth characterisation of charter flights. However, for regular (scheduled) airlines, the servicing of mass tourist traffic means only a segment that is anyway not especially crucial. Supplementary to air carriage there is carriage by coach (Chapter 6), as engaged in by domestic transport firms, first and foremost, while transport by other means does not play a major role in mass tourist traffic in Poland (Chapter 7). A ‘Conclusions’ section then offers key statements, findings and generalisations that the analysis carried out is able to sustain.

2. LITERATURE REVIEW

The theme of this monograph is not of special interest to theoreticians and methodologists, either of tourism or of transport. Against this disadvantageous background (sometimes called the ‘current embryonic stage’), one can distinguish positively the work of Scott *et al.* (2008) dedicated to the contribution of network analysis to the understanding of tourism destinations and organisations. The authors discuss their theoretical and methodological aspects, since “tourism is a network industry par excellence” (Scott *et al.*, 2008, p. 15). While this is a relatively new approach in tourism literature, in other sciences (e.g. transport sciences) network analysis has a long tradition and has provided important insights as regards knowledge of the structure and dynamics of complex systems. However, it seems the authors’ contribution relies mainly on presenting a wider spectrum of qualitative approaches (the development of sustainable tourism networks, tourism destinations as networks, policy networks and tourism governance, to mention but a few) and application of quantitative methods (*i.a.* tourism as a complex adaptive system, technological networks for the tourism, network simulation) rather than the development of the considerable problems of tourism.

A good, in-depth characterisation of tourist agencies, including tour operators, functioning on the Polish tourist market is provided in the publications of Konieczna-Domańska (2008) and Szymańska (2009), respectively. The former offers a thorough and systematic presentation of the activity of travel agencies against a broad economic and theoretical background, while the latter is of much more utilitarian character. Both use extensive references and provide many generalisations regarding tourist agencies in the Polish situation. For the purposes of this book, however, a source of greater interest is a consideration of cooperation between carriers and travel agencies in a historical perspective, as presented by Konieczna-Domańska (2008).

Tourism is inevitably connected with the movement of the human being in space. The meeting of such needs implicates a change of place of stay, and, therefore, generates demand for transport. It is estimated that tourism in Europe is responsible for 15 to 20% of passenger-km accounted for by surface transport, and in air transport this share is much greateer (Peteers *et al.*, 2007). This is also the case for Poland, where after 1990 a great growth in tourist traffic, domestic as well as international was observed. This growth would not have been possible without a simultaneous increase in the supply of carriage capacity of transport companies used by tour operators. There is a synergy between new carriage services and the growth in demand for them.

The studies of transport in relation to tourism have mainly been descriptive, focusing on the modes of transport used to move tourists from their origin to their destination and back. Our knowledge of this theme is unsatisfactory, since the matter is under-researched. It is usual for transport issues to be limited to just one chapter in academic textbooks on tourist traffic services (e.g. Milewski, 2007), or isolated articles in Problemy Turystyki and Przegląd Komunikacyjny. There is a scarcity of academic research on the implications for transport arising out of leisure and recreation services. Tourism mobility is poorly represented in the literature, and the existing papers are relatively poor as regards concepts and methods. This partly reflects data scarcity, rapidly changing situations and a blurring of differences among various forms of temporal mobility of society. In addition, in Poland the wider context has been complicated as a result of EU enlargement, and a change in the nature, course and roles of boundaries. As a result of all this, Polish literature lacks in-depth empirical studies and synthesizing works on spatial aspects of the cooperation between carriers and tour operators.

Thus, Żebrak (1997) discusses conditions for the development of transport in the tourist economy, while Popielas and Tauber (2002) analyse the merits and faults of domestic and foreign transport. Bebenow (2012) in his wider work on rail tourism in Poland, indicates problems and limitations, but also opportunities for development. Gawek (2000) focuses on the presentation of conditions for the improvement of cooperation between a rail carrier and the tourism market, and much earlier Prażanowski (1980) considered transport servicing of tourist carriage, while elsewhere providing a method by which to evaluate transport accessibility in tourist regions (Prażanowski, 1982). In turn, Herma (1980) compares the transport needs of seasonal tourism with the supply of carriage services, Seweryn (1999) presents an evaluation of Poland's transport accessibility to overseas tourists, Czecharowski (2001) analyses the growth and decline of a regional airport (Szczytno-Szymany) based on the activation of tourist traffic, and Nowakowski (1999) evaluates world cruise-ship tourism. Last but not least, Gajewski (1982) reviews cable cars and ski-lifts. Of course, there are many more, similar papers. In their majority these can today be seen to present issues of historical importance only, since they are quite dated, even if more in the nature of reviews (e.g. Ciesielski and Jordan, 1977; Mikulski, 1991). Moreover, not all relate to organised (mass) tourist traffic. Apart from one (Bebenow, 2012), all the papers are of a case-study nature, are based on scarce empirical data, and apply unsophisticated methods.

Besides papers at the interface of transport and tourism, there are also some transport-related ones connected directly with our subject, that is on passenger air transport and maritime shipping (e.g. Panasiuk and Pluciński, 2008; Pijet-Migoń, 2012).

The sparse Polish literature might be set against voluminous achievements globally, beginning from the theoretical framework underpinning tourism planning and organisation derived using a procedural and structural approach (Costa *et al.*, 2013). Space being limited, we can do no more than review briefly the items deemed of greatest importance. In the literature, we can find an ever-greater number of high-quality monographs (Rojek and Urry, 1997; Ioannides and Debbage, 1998; Lumsdon and Page, 2004; Budko, 2006; Osipova, 2006; Badan and Bhatt, 2007; Burns and Novelli, 2008; Graham *et al.*, 2008; Lohmann, 2009;

Haldrup and Larsen, 2010); as well as academic textbooks (Page, 1994, 2009; Williams, 1998; Duval, 2007); reports of prestigious institutions and organisations (e.g. OECD, 2000; King & Associates, 2007), and chapters in collective works (Halsall, 1992; Shaw, 1993; Page, 1998, 2004; Hall, 2008; Robbins and Dickinson, 2013), and series and periodicals especially devoted to the above mentioned problems (Journal of Sustainable Tourism, 2006, 14, 2; Japan Railway & Transport Review, 2010, 55; Tourism Geographies; Leisure Studies; Annals of Tourism Research; Tourism Management; Transport Reviews). There are also a great many articles in the different geographical journals (e.g. Journal of Transport Geography; Progress in Human Geography; Geoforum).

"Transport provision is a permissive factor in much tourist/recreation development, itself a product of increasing mobility, leisure time and affluence" (Halsall, 1992, p. 175). In relation to the supply side of tourism transport, Hall distinguishes four general functions: "(1) linking the source market with the host destination; (2) providing mobility and access within a destination area/region/country; (3) providing mobility and access within an actual tourism attraction; and (4) facilitating travel along a recreational route, where both the transport form and nature of the route may combine or act singly to provide the tourism experience" (Hall, 2008, p.199). We will focus on the first function of transport, while regarding the others as of secondary, if not even marginal, importance to us. In fact, Hall (2008) also mentions a fifth function represented by transport forms located in a particular place. However, this is seen to have been largely neglected. The latter role is for example played by heritage railways, and that particular theme does have a substantial literature devoted to it (e.g. Hallsall, 2001).

Wheatcroft (1998) analyses the global relationship between the airline industry and tourism, seeing this as a mixture of technological factors, market pressures and regulatory policies, while Mansfeld (1990) provides an overview of spatial patterns characterising international tourist flows over the long term. Hall (1999) explores two sets of conceptual issues at the interface of transport and tourism: (1) transport as a culture gatekeeper to host-tourist interaction; and (2) the role of tourist mobility at the local level and its impact on inequality and externality effects. The first issue is in fact a borrowing of Ioannides's concept of tour operators as gatekeepers of tourism (Ioannides, 1998). In turn, Debbage (2002) investigates the ways in which airport-based infrastructural constraints can influence tourist flows, and in particular how the lack of sufficient take-off and landing slots can constrain the interaction of tourism demand and supply.

Using a social representation approach, Dickinson and Dickinson (2006) explore the multiplicity of social realities underpinning peoples' attitudes to transport, tourism and subsequent behaviour. In a similar vein, Becken (2005) analyses the travel patterns characterising coach tours to account for potential differences between cultures of origin. Her research demonstrates that it is useful to segment coach tours by different cultures of origin when assessing indicators of tourist transport sustainability.

Within the context of this book, many studies have analysed transport, especially aviation, albeit without any special reference to tourism. Prideaux (2000) identifies the significance of the transport system in destination development, concluding that those without airport facilities are largely restricted to markets accessible by car while air travel is a key element in the winning of new markets beyond the reasonable reach of a car. Dobruszkes (2009) analyses how European low-cost carriers have adapted and developed their networks to the CEECs as a result of the liberalisation of air space, offering new opportunities for servicing airlines. East-West flights were numerous in 2008, while four years earlier it had been North-South links that dominated in Western Europe (Dobruszkes, 2006). Graham and Vowles (2006) in turn point to the segmentation of brands and markets as mainline airlines reposition to face the challenges posed by low-cost competitors – by way of the creation of subsidiary 'carriers-within-carriers' with lower unit costs (albeit also with very limited success). O'Connell and Williams (2005) compare passengers' selection criteria between an LCC and a full service airline on the European market, and as regards the fast-growing Asian economy.

The last several years have also brought substantial books on aviation. For example, in the aforementioned monograph, Graham *et al.* (2008) discuss the implications of the aviation industry for leisure travel on a worldwide scale, while Bowen (2010) presents the technological development of aviation, the competition among aircraft manufacturers, the deregulation and privatisation of the airline industry, the articulation of passenger and cargo services, and problems facing airports – all from a geographical point of view. In similar vein, Doganis (2006) analyses the effect of continued liberalisation and 'open skies' policies, the need to cut labour costs, the impact of alliances and consolidation, the growing threat of low-cost carriers and the problems faced by state-owned airlines. In turn, Wensveen (2011) looks at air transportation from a management perspective, while the recently-published volume edited by Gross and Lück (2013) provides an overview of the development of LCCs around the globe, discussing regional aviation profiles, the background and growth of LLCs on respective markets, recent market trends and examples of best practice.

Cruising has also become the theme of many larger publications. For example, Dickinson and Vladimir (2008) examine all aspects of the modern cruise industry, describe revolutionary management, marketing and sales techniques, all under the book's very telling title of *Selling the Sea.* Cruise ship tourism seen from various perspectives (demand for cruises; destinations and products; economic, social and environmental impacts, etc.) is in turn the theme of a collective work edited by Dowling (2006). World crusing routes are also looked at by the literature (e.g. Cornell, 2008). A common feature of all the publications referred to is their very practical character.

3. SOURCES, METHODS OF COLLECTION AND DATA PROCESSING

Despite the existence of at least several institutions involved in the collection of data on companies (see for example the REGON system of the Central Statistical Office[3]), there is no single proper and reliable base on tour operators and carriers – a fact that has necessitated the creation of four databases by the authors.

The first, initial database relates to tour operators. The basic sources in the creation of a homogeneous base of tour operators have been single items of information on enterprises included in Hoppenstedt Bonnier Information Polska (HBI). On the basis of these a list of 372 enterprises with main activity with code 6330 of the European Classification of Activities (Activity of tourist agencies, pilots and tour guides; the remaining tourist activity) with turnover above 1 million zloties has been created. This list has been supplemented (to 398 items) with enterprises whose additional activity has code 6330[4]. Then the list was cut by the 20 tour operators going bankrupt or being closed down in the years 2010-2012[5]. In 2012 alone, some 10 tour operators went bankrupt, while there are many more for which activity in this sphere is forbidden. The list was next checked in the Central Register of Tourist Agencies and Tourist Brokers (Centralna Ewidencja Organizatorów Turystyki i Pośredników Turystycznych, abbreviated to CEOTiPT) and compared with reports in the periodical Wiadomości Turystyczne (*Touroperatorzy 2012* and *Touroperatorzy 2013*). Non-existent firms were removed on this basis, and missing ones added.

The final list consists of the largest tour operators (38 entities in total) with annual turnover from the organisation of tourist events exceeding at least 10 million zloties (in 2012). The list has been updated and supplemented with some

[3] A shortcoming of data in the REGON is that they often supply a different address for the registration of an entity and its real place of its activity. Beyond that, there is the problem of the lack of updating of information: many registered entities either never even commenced with their activities or else have suspended them, or are in the process of closing down or have already gone bankrupt, or are active in a completely different field from the one registered. To generalise, it may be suggested that the number of active companies is no more than ⅓ of all registered entities.

[4] Some entities, despite actually being active in organising tourist events, may be registered under a completely different category of activity.

[5] Among the larger ones, the Polskie Biuro Podróży Orbis (brand name Orbis Travel) terminated its activity in 2010, Triada in 2011 and Sky Club in 2012; the latter had organised trips under its own and the Triada brand.

missing information on the basis of the aforementioned *Touroperatorzy* reports, as well as data and information from the National Registry (Krajowy Rejestr Sądowy, KRS). The latter is made available by the InfoVeriti firm (www.infoveriti.pl). Annual reports of larger companies and official websites of entities have also been taken into account. Finally, the database of tour operators includes the following information: name, seat and type of activity, main geographical areas of activity, market segment, ownership and legal forms, year of start-up activity in Poland, number of customers served, turnover from organisation of tourist events, numbers employed, transport means used, cooperating transport companies, and country of origin of capital.

The second and third databases concern Polish and foreign air carriers in the service of Polish tour operators. While the second base consists of scheduled carriers, the third includes charter carriers. In each case, the basis has been provided by lists of the 25 most important air carriers providing flights from Poland, scheduled or charter, respectively, published by the Civil Aviation Authority (Urząd Lotnictwa Cywilnego, ULC). Catalogues and websites of tour operators cooperating with selected carriers have been used for supplementary information. In the case of a lack of official data, connections between the tour operator researched and carriers have been looked for with the use of key words (a combination of the tour operator's name with the means of transport, or names of carriers) in the Polish and English languages. In this case commonly used Internet browsers have been used. Information on air carriers have been supplemented using data from the InfoVeriti firm (registered in Poland) and from press materials, websites and annual reports of entities (registered in Poland and abroad). Databases of air carriers embrace: name of carrier, seat (country, locality), type of carriage activity (scheduled airlines, including low-costs, and charters), ownership form, year of start-up of activity, number of passengers served on the Polish market, size of fleet (total), tour operators being served, all as of 31 December 2012. In the case of some scheduled carriers, cooperating tour operators could not be found and/or confirmed. Nevertheless, both databases, despite featuring relatively small number of air carriers (25 in each) embrace an absolute majority of the passengers served at Polish airports: in scheduled traffic the figure is 98.68%, while in charter traffic it is 96.79%. Other carriers, despite their large numbers, participate in carriage at minimum levels only. For example, the remaining 3.21% of passengers in charter traffic have been transported by no fewer than 101 carriers.

Finally, the fourth and smallest database takes in the largest Polish road carriers engaging in the transport of tourists via feeder lines (four entities) and long-distance coach services (the remaining entities) for the Polish tour operators. Some tour operators possess fleets of coaches of their own. The basis is created using catalogues and websites of tour operators. As in the case of the airlines, information on coach carriers has been supplemented by data from the InfoVeriti firm, the press information, webpages and annual reports of given companies, all as of 31 December 2012. The final database of coach carriers consists of the following information: name of carrier, seat, type of activity, ownership and legal forms, year of start-up activity in Poland, number and names of cooperating tour operators, turnover (total), numbers employed (total), type of means of transport, rolling stock (total), and country of origin of capital.

4. TOUR OPERATORS ACTIVE ON THE POLISH MARKET

4.1. General characteristics of tour operators

In line with the Polish legal system, tourist enterprises can apply for a permit to engage in business activity in forms such as (1) tour operator, (2) broker/middleman (otherwise: travel agent, or retail travel agent, in Polish: *pośrednik* or *detaliczny agent podróży*), or (3) entity performing both functions simultaneously, but also as (4) a simple agent, as will be explained later on. The product of a tour operator is a comprehensive package of services[6]. The package can contain – to varying degrees – such components as: transport, accommodation, catering, sightseeing, pilotage, entertainments, rent-a-car, insurance and others.

The authors' database extends to just 1.2% of the total number of tour operators and tour operators plus tourist commodity brokers registered in Poland (in total 3116 entities in 2012, according to the Central Register of Tourist Agencies and Tourist Brokers, CEOTiPT). There are 621 tour operators in Poland, accounting for nearly 20% of all firms in the tourism sector. An absolute majority (2495, or 79.74%) of the latter firms are travel agencies involved in organisation as well as in brokerage, i.e. the sale, not only of their own tourist events (transactions), but also those of some other firm. Entities also include 13 exclusive tourist brokers, these evidently constituting a tiny (0.42%) minority of all firms included in the statistics. CEOTiPT does not encompass the great mass of small tourist agents (estimated at several thousand in number) – these representing the last form of tourist firm, and one not needing to be included within the Central Register. In several last years, the total number of registered tourist agencies has been increasing, as the distant geographical scope of travel activates demand for brokerage services and organisation (Konieczna-Domańska, 2008, p. 67).

Tourist entities are spread across Polish space in an extremely uneven way. It is usual for better-developed regions with more affluent population to have the largest numbers of tour operators plus tour operators + tourist brokers. Good examples of these are Mazowieckie, Śląskie and Małopolskie voivodships. In turn, regions (like Lubuskie, Świętokrzyskie, Opolskie and Podlaskie) that are relatively less well-developed, poorer, with lower purchasing power of inhabitants, concentrate a distinctly-smaller number of tourist entities (Table 1).

[6] An interesting characteristisation of tour operator activities in the US is presented by Ioannides (1998).

Table 1. Tourist entities in the CEOTiPT (Central Register of Tourist Agencies and Tourist Brokers), 2012

Voivodship	Tour operators		Tour operators + tourist brokers		Tourist brokers		Total number
	Number	%	Number	%	Number	%	
Dolnośląskie	70	11.27	182	7.29	2	15.38	254
Kujawsko-pomorskie	21	3.38	63	2.53	0	0.00	84
Lubelskie	24	3.86	82	3.29	1	7.70	107
Lubuskie	6	0.97	46	1.84	0	0.00	52
Łódzkie	32	5.15	125	5.01	0	0.00	157
Małopolskie	34	5.48	361	14.47	2	15.38	397
Mazowieckie	75	12.08	590	23.66	2	15.38	667
Opolskie	11	1.77	45	1.80	0	0.00	56
Podkarpackie	17	2.74	92	3.69	0	0.00	109
Podlaskie	62	9.98	12	0.48	0	0.00	74
Pomorskie	59	9.50	172	6.89	2	15.38	233
Śląskie	110	17.71	293	11.74	0	0.00	403
Świętokrzyskie	1	0.16	54	2.16	0	0.00	55
Warmińsko-mazurskie	1	0.16	113	4.53	0	0.00	114
Wielkopolskie	45	7.25	178	7.13	1	7.70	224
Zachodniopomorskie	53	8.53	87	3.49	3	23.08	143
Poland total	621	100.00	2,495	100.00	13	100.00	3,129

Authors' own calculations based on: www.turystyka.gov.pl/ceotipt/statystyki/statystyka/2 (7.03.2014).

Although the database contains just 38 tour operators, it is these that are the largest ones and play the most important role on the Polish market for organised (mass) tourist traffic. All calculations and generalisations in this book therefore concern these data, from which further conclusions have been drawn.

The concept of turnover helps express the commercial size of a given enterprise. Thus, turnover represents gross revenues or gross amounts due connected with the sale of tourist services by a given tour operator. If we take into account the criterion of turnover, then the list of the largest travel agencies registered in Poland in 2012 embrace just the 38 tour operators referred to above (Table 2). The turnover of each of these has been not lower than 10 million zloties. When compared with the previous year, there is seen to have been an increase in the number of such tour operators by ten, with some changes also being noted in the ranking.

Tour-operator structure in terms of levels of turnover can be described as oligopolistic, in that there is a great difference in size among several large companies and the remaining (c. 3000 small) ones. Therefore, it is quite probable that the next few years will bring further consolidation and polarisation, with small firms being incorporated into larger ones, and either disappearing from the market, or finding themselves in niches being beyond the interest of the 'giants'. As

Konieczna-Domańska (2008, p. 156) rightly remarks, "Observation of the market presents that concentration process is mostly dynamic in group of tour operators what would be in line with trends seen on the most developed European markets".

At the top of ranking in 2012 is Itaka, with its turnover of 1.1 billion zloties; as followed by TUI Poland with a turnover almost 50% lower (at 641.2 million). Also quite substantial is the difference between the second and third tour operators (with Rainbow Tours on 456.6 million), and also between the latter and the company in fourth place (Wezyr Holidays – 277.1 million). Not until the fourth place do the differences decrease in absolute terms (Neckermann Polska, Sun & Fun Holidays, Alfa Star). In summary, the 38 largest tour operators turnover have a joint turnover of 4.29 billion zloties, which represents more than three-quarters of the entire market (Table 2).

Besides with reference to turnover, the sizes of travel agencies may also be well characterised in terms of numbers of customers served and numbers employed. A hierarchy of tour operators based on number of travellers looks similar – but not identical – to the aforementioned one. Most tourists have been served by Itaka (475,000), as followed by TUI Poland, but with a total just under half as high (220,633). Other large tourism organisers (Rainbow Tours, Wezyr Holidays, Alfa Star, Neckermann Polska) served between 190,000 and 123,000 customers in 2012. The ranking of the remaining large and medium-size companies points to some fluctuations. In total, the 38 largest tour operators have served c. 2.13 million customers.

When tour operators are considered, there is found to be a dependent linear relationship between turnover resulting from the organisation of tourist events and numbers of customers (Figure 1), with this taking the form:

$$y = 0.001860x^2 + 393.667309x + 12465.381239,$$

where x is turnover resulting from the organisation of tourist events,
y is the number of customers of given tour operators.

The interdependence is described by a linear regression model which is statistically significant: correlation coefficient $r = 0.980822$, and determination coefficient $r^2 = 0.96201181$.

There are also dependent relationships determined between the number of people employed at given tour operators and their numbers of customers or turnover, respectively, but they are statistically insignificant, however.

By and large, the numbers employed at the largest tour operators, i.e. those with the greatest turnover and largest number of customers, is substantial but need not be maximal. The largest number employed characterises Rainbow Tours, which is to say a tour operator that ranks third in terms of turnover and numbers of customers served. Itaka tops the ranking by number of employed and is in the second position. More than a proportionate number in employment also characterises Wezyr Holidays, as well as Mazurkas Travel, both probably avoiding the outsourcing applied at other travel agencies on a wider scale. Some tour operators of foreign origin (e.g. TUI Poland) employ fewer workers than one would expect from their turnover and numbers of customers served (2nd positions). Indeed, in line with the existence of various attitudes towards outsourcing, numbers employed represents a worse measure of a tour operator's size than does either number of customers or turnover.

Over half of the number of tour operators have their seats in Warsaw (among them firms that are among the largest in the country, like TUI Poland, Wezyr Holidays, Neckermann Polska, Sun & Fun Holidays, Exim Tours, Oasis Tours,

Table 2. The largest tour operators registered in Poland (as of 31 December 2012)

Tour operator name	Type of tourism	Main destinations	Segment of market	No. of customers	Annual turnover (M zloties)	No. of em-ploy-ees	Transport means used	Cooperating transport companies	Country of origin of capital
Itaka	foreign outward tourism	Turkey, Canary Islands, Greece	family, seniors, premium, singles, conference	475,000	1139.218	238	aeroplanes, scheduled coaches, owned and leased coaches	**Airlines:** Aeroflot-Russian Airlines, Air France, Alitalia, Bingo Airways, Czech Airlines, Emirates, Enter Air, KLM, Quatar Airways, LOT Polish Airlines, TAP Portugal, Travel Service, Wizz Air. **Coach 'feeder' lines:** Żak Ekspress, Podlasie Express, BP Tour. **Coaches:** BUT Hubertus, Tramp, own	Poland (2 shareholders)
TUI Poland	foreign outward tourism	Canary Islands, Turkey, Greece	premium, youth, groups, family	220,633	641.255	94	aeroplanes	Aegean Airlines, Nouvelair, Enter Air, Onur Air, Travel Service, Sky Airlines, Sun Express, Small Planet Airlines, TAP Portugal, Turkish Airlines, China Airlines	Germany (exclusive ownership of Leibnitz Service GmbH)
Rainbow Tours[a]	foreign outward tourism	Spain, Greece, Croatia	family, premium, groups	190,000	456.620	277	scheduled & charter aeroplanes, coaches	**Airlines:** Brussels Airlines, Turkish Airlines, Air France, British Airways, AMC, Air Cairo, Corendon Airlines, Air Italy Polska, Enter Air, KLM, Wizz Air, LOT Polish Airlines. **Coaches:** Transbis, Bomatur, own	Poland (many shareholders)
Wezyr Holidays	foreign outward tourism	Turkey, Egypt, Greece	family, premium, groups	137,000	277.107	210	aeroplanes	Air Arabia, Air Cairo, Bingo Airways, Bulgaria Air, Enter Air, Nouvelair, Pegasus Airlines, LOT Polish Airlines, Royal Air Maroc, Sky Airlines, Small Planet Airlines, SprintAir, Syphax Airlines, Travel Service	Russia, Turkey, Belarus, Ukraine (exclusive ownership of OTI Holding)

Neckermann Polska	foreign outward tourism, domestic tourism	Spain, Bulgaria, Greece, Austria	family, seniors, premium, youth, honey-mooners, groups	123,000	242.467	136	aeroplanes	Thomas Cook Airlines, Lufthansa, Tunis Air, Air Europa, Cyprus Airways; charters: Royal Air Maroc, Nouvelair, Enter Air, AMC, Balkan Airways, Air Malta, LOT Polish Airlines, Travel Service, Small Planet Airlines	Germany (exclusive ownership of TC Touristik GmbH, part of Thomas Cook Group)
Sun & Fun Holidays	foreign outward tourism	Egypt, Tunisia, Turkey	offer directed to various customers	98,000	215.725	58	aeroplanes	Enter Air, Emirates, Travel Service, Bingo Airways	Tunisia
Alfa Star	foreign outward tourism	Egypt, Turkey, Spain	family, premium, singles, groups	136,440	204.487	58	scheduled & charter aeroplanes	Air Cairo, Small Planet Airlines, Nesma Airlines, Enter Air	Poland (2 shareholders)
Exim Tours	foreign outward tourism	Egypt, Tunisia, Turkey	family, groups, seniors	84,716	178.326	76	aeroplanes, coaches	**Airlines:** Air Cairo, Air France, Air Memphis, Bingo Airways, Enter Air, KLM, LOT Polish Airlines, Nouvelair, Small Planet Airlines, Travel Service. **Coaches:** no data	Czech Republic, Germany
Grecos Holiday	foreign outward tourism	Greece (Rhodes, Crete, Corfu)	couples, family	57,000	142.800	31	aeroplanes	Enter Air, LOT Polish Airlines, Corendon Airlines, Travel Service, Aegean Airlines	Poland (3 shareholders)
Oasis Tours	foreign outward tourism	Tunisia (2011)	youth, student, family, seniors, premium, groups	c. 80,000	134.000	82	aeroplanes	SprintAir, LOT Polish Airlines, Nouvelair, Tunis Air	Tunisia (2 shareholders)
GTI Travel Poland[b]	foreign outward tourism	Turkey, Egypt, Tunisia, Bulgaria (2011)	family, singles, couples	c. 30,000	64.310	19	aeroplanes, coaches	**Airlines:** SkyAirlines (own carrier), Enter Air, Small Planet Airlines, Bingo Airways, Travel Service Polska, Pegasus Airlines. **Coaches:** no data	Turkey (2 shareholders)

Tour operator name	Type of tourism	Main destinations	Segment of market	No. of customers	Annual turnover (M zloties)	No. of em-ploy-ees	Transport means used	Cooperating transport companies	Country of origin of capital
Logos-Tour[c]	foreign outward tourism, inward tourism	Peru, Bolivia, Japan, South Africa	youth, family, seniors, premium, cultural	25,548	57.635	85	aeroplanes, coaches	**Airlines:** scheduled airlines. **Coaches:** no data	Poland (exlusive ownership of ZNP)
Ecco Holiday	foreign outward tourism, inward tourism	Bulgaria, Crete, Egypt	youth, groups, seniors	26,697	39.385	76	aeroplanes	**Ecco Holiday:** Aegean Airlines, Alitalia, Bulgaria Air, Iberworld, LOT Polish Airlines, Norwegian Air Shuttle, Onur Air, Travel Service, Tunis Air. **Ecco Travel:** Aeroflot-Russian Airlines, Air France, Austrian Airlines, Cathay Pacific, Condor Flugdienst, Emirates, KLM, LOT Polish Airlines, Lufthansa, Martinair, Quatar Airways, SriLankan Airlines, Swiss, Singapore Airlines	Poland (more shareholders)
Viva Club Polska	foreign outward tourism	Egypt, Tunisia, Turkey	family, groups	16,705	34.280	12	aeroplanes	Air Cairo, Enter Air, Bingo Airways, Nouvelair, LOT Polish Airlines, Small Planet Airlines, Air Memphis, Travel Service	Poland, Tunisia (2 equal shareholders)
Jan Pol Incoming Tour Operator	inward tourism	from Europe and the USA (2010)	individual, group, 'tailor-made'	39,700	34.260	21	coaches	own coaches	Poland
Furnel Travel International	inward tourism, foreign outward tourism	outward: 'tailor-made'	incoming: group; outward: educational	c. 42,000	29.700	c. 50	aeroplanes	LOT Polish Airlines + scheduled planes	Poland (3 different shareholders)

7islands	foreign outward tourism	Greece, Spain	family, couples, groups	11,770	28.083	9	charter & scheduled aeroplanes, coaches	**Airlines:** Enter Air, Travel Service, Small Planet Airlines. **Coaches:** no data	Poland (Red Hot Ltd)
Mazurkas Travel Biuro Podróży	inward tourism, foreign outward tourism	mainly from Spain, Portugal, USA (2009)	incoming: groups	inward: c. 80,000; outward: c. 3000	c. 28.000	200	coaches	own fleet of coaches for service of Warsaw tours and other events according to needs of customers	Poland (2 shareholders)
Centrum Turystyki Oskar	foreign outward tourism	Croatia, Greece, Bulgaria	youth, student, family, seniors, groups	25,000	25.549	27	coaches	mainly own coaches	Poland (2 shareholders)
Funclub	foreign outward tourism	Spain, Bulgaria (2011)	youth, student, seniors, family, groups	23,430	23.081	49	coaches	own coaches	Poland (2 shareholders)
Atlas Tours[d]	foreign outward tourism, maritime tourism	Greece, Mexico, Dominican Republic	family, groups	9,150	23.000	30	charter aeroplanes, luxury sea cruises	**Airlines:** Enter Air, Aegean Airlines	Poland (2 shareholders)
Trade & Travel Company	foreign outward tourism	USA, Israel, South & Central America	exotic, trekking	24,000	c. 20.000	30	scheduled & charter aeroplanes, coaches	**Airlines:** Air France, American Airlines, British Airways, Cathay Pacific, China Airlines, El Al Israel Airlines, Finnair, Lufthansa, Malysia Airlines, KLM, LOT Polish Airlines, Malév, Singapore Airlines, SriLankan Airlines, Turkish Airlines. **Coaches:** no data	Poland (2 shareholders)

Tour operator name	Type of tourism	Main destinations	Segment of market	No. of customers	Annual turnover (M zloties)	No. of em-ploy-ees	Transport means used	Cooperating transport companies	Country of origin of capital
CB International	inward tourism	from Israel (mainly service of 'Marshes of the Living')	groups	c. 8,500	19.744	9	aeroplanes	no data	Israel (shareholders: KN International Tourism – 91.67%, other – 8.33%)
Wygoda Travel[e]	foreign outward tourism, inward tourism	Dolomites and Alps, Bulgaria, Croatia	family, premium	15,931	19.436	14	charter & scheduled aeroplanes, coaches	**Airlines:** *i.a.* Enter Air, Travel Service Polska. **Coaches:** no data	Poland (2 shareholders)
Almatur Opole	foreign outward tourism, inward tourism	Italy, Russia, Scandinavia	youth, linguistic, exotic	15,000	18.134	18	aeroplanes, coaches	**Airlines:** no data **Coaches:** own	Poland (4 shareholders)
Lekier	foreign outward tourism	France, Germany, Italy	youth, student, family, seniors, premium	c. 10,500	17.511	17	scheduled aeroplanes, coaches	**Airlines:** Air France. **Coaches:** own and leased from Sindbad	Poland (3 shareholders)
Almatur Polska[f]	foreign outward tourism, domestic tourism	Italy (2011)	youth, linguistic, children	c. 14,000	16.876	27	charter & scheduled aeroplanes, coaches	**Charter airlines** *i.a.* Bulgarian Air. **Scheduled airlines** *i.a.* British Airways, LOT Polish Airlines, TAP Portugal, Air Malta. **Coaches:** *i.a.* Almatur Opole, Almatur Częstochowa	Poland

Logos Travel	foreign outward tourism	USA, India, Australia, New Zealand	active (trekking, cycling), family, seniors, groups	4,720	16.582	52	aeroplanes	scheduled aeroplanes	Poland (1 shareholder)
Atas[g]	foreign outward tourism	UK, Malta (2011)	youth, linguistic	14,320	16.340	44	coaches, scheduled & charter aeroplanes	**Coaches:** own. **Microbuses:** SBS Euro Transport. **Scheduled airlines:** British Airways. **Charter airlines:** Air Malta	Poland (1 shareholder)
CT Poland	foreign outward tourism	China, SE Asia, Japan, India	exotic, trekking	2,300	16.270	12	scheduled aeroplanes	no data	Poland (2 shareholders)
Almatur Katowice[h]	foreign outward tourism, domestic tourism	Turkey, Balkans (2011)	youth	c. 12,200	15.290	18	aeroplanes, coaches	no data	Poland
Best Reisen Group	foreign outward tourism	Egypt, UAE, Sri Lanka, The Maldives	groups, premium, family, seniors	10,000	15.108	10	aeroplanes	**Airlines:** *i.a.* SriLankan Airlines, Quatar Airways, Condor Flugdienst	Poland, Egypt
Citron Travel	foreign outward tourism	Northern Cyprus, Majorca, Bodrum	family, groups, premium	9,000	15.000	11	charter aeroplanes	Corendon Airlines, Enter Air	Turkey (Northern Cyprus)
Travel Projekt	inward tourism	from Germany	groups, youth, children	c. 28,000	14.810	15	no data	no data	Poland, Germany (3 shareholders)
Biuro Turystyczne Olimp	foreign outward tourism	Italy (2011)	family, youth, student, premium	12,000	14.020	3	coaches	TPO Pastuszak	Poland (1 owner)

Tour operator name	Type of tourism	Main destinations	Segment of market	No. of customers	Annual turnover (M zloties)	No. of em-ploy-ees	Transport means used	Cooperating transport companies	Country of origin of capital
Gama[i]	foreign outward tourism	Bulgaria	family, youth	no data	c. 12.640	5	charter aeroplanes, coaches	**Airlines:** Bulgarian Air Charter. **Coaches:** no data	Poland (2 share-holders)
Sigma Travel	foreign outward tourism	Asia, Africa	exotic, sight-seeing tours	no data	11.760	c. 20	scheduled aeroplanes, coaches, sea ferries	*i.a.* own coaches, no information on other carriers	Poland (2 share-holders)
Skarpa Travel	foreign outward tourism, domestic tourism	Balkans	ski-tours, sightseeing tours	no data	10.500	19	coaches	own coaches (c. 14)	Poland

[a] – with affiliates, including Bee & Free;
[b] – tour operator terminated its activity in 2013;
[c] – full name: Biuro Turystyki ZNP Logos Tour;
[d] – full name: Przedsiębiorstwo Turystyczne Grupa Atlas Tours;
[e] – jointly with affiliate Comfort Club;
[f] – full name: Biuro Podróży i Turystyki Almatur Polska;
[g] – full name: Agencja Wielobranżowa Atas;
[h] – full name: Biuro Podróży i Turystyki Almatur Katowice;
[i] – full name: Biuro Turystyczno-Handlowe Gama.

Authors' own elaboration, mainly based on: (1) HBI Polska; (2) *Touroperatorzy Raport 2012*; (3) *Touroperatorzy Raport 2013*; (4) www.infoveriti.pl; (5) websites of tour operators.

GTI Travel Poland, Logos Tour, Furnel Travel, 7islands and Mazurkas Travel). Beyond that, there are five in the city of Poznań (*i.a.* Grecos Holiday, Ecco Holiday, Oskar, Funclub), four in Cracow (*i.a.* Jan Pol Incoming Tour Operator and Wygoda Travel), and two each in Łódź (Rainbow Tours and the Trade & Travel Company) and Opole (Itaka and Almatur Opole). In the remaining centres (Chorzów, Józefów near Warsaw, Katowice, Radom, Skierniewice, and Żory) there are seats of just one, usually rather smaller, tour operator.

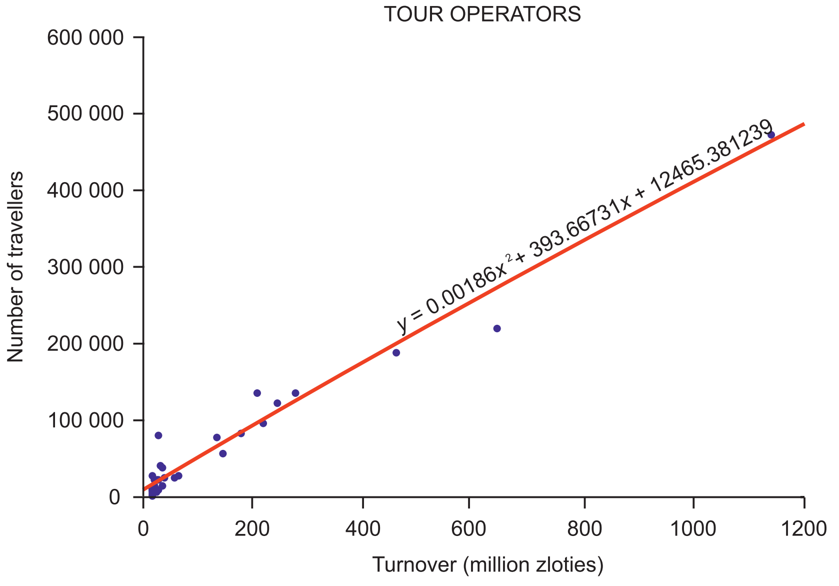


Fig. 1. Linear regression model for the relationship between turnover from the organising of tourist events by tour-operators and numbers of participants

Source: authors' own elaboration (refers to all figures, unless otherwise stated).

The largest total turnover is achieved by tour operators with their seats in Warsaw (47.2% of the total), as followed by the cities of Opole (27%) and Łódź (11.1%). Turnover in other centres does not exceed 6% of the total. In similar vein, a presentation has been made of the spatial distribution of customers served. The largest numbers are in fact served by Warsaw tour operators (47.9%), next by those from Opole (23.1%) and then Łódź (10.1%). In other centres, the share of customers served does not exceed 10%. In turn, the largest shares in employment are accounted for by the cities of Warsaw (52.7%), Łódź (14.2), Opole (11.8) and Poznań (10.9).

Now, we will look more closely at tour-operator structure in line with various approaches – i.e. by reference to the number of entities, turnover resulting from the organisation of tourist events, numbers of customers served, and finally numbers employed. In the remaining part of this Chapter, a dozen or so case studies will be presented. They provide far-reaching insight into the nature of selected tour operators. A quantitative characterisation of these entities is given in Appendix.

Table 3. Tour operators by the locations of their seats (2012)

Seat	Tour operators		Turnover		Customers		Employed	
	Number	%	M zloties	%	Number	%	Number	%
Chorzów	1	2.63	34.280	0.80	16,705	0.79	12	0.56
Cracow	4	10.54	78.216	1.82	67,631	3.18	57	2.64
Józefów	1	2.63	16.340	0.38	14,320	0.67	44	2.04
Katowice	1	2.63	15.290	0.36	12,200	0.57	18	0.83
Łódź	2	5.26	476.620	11.11	214,000	10.07	307	14.20
Opole	2	5.26	1 157.352	26.98	490,000	23.06	256	11.84
Poznań	5	13.16	247.397	5.77	136,847	6.44	235	10.87
Radom	1	2.63	204.487	4.77	136,440	6.42	58	2.68
Skierniewice	1	2.63	12.640	0.29	10,000	0.47	5	0.23
Warsaw	19	50.00	2 023.687	47.18	1,017, 967	47.90	1 140	52.72
Żory	1	2.63	23.000	0.54	9,150	0.43	30	1.39
Total	38	100.00	4 289.309	100.00	2,125,260	100.00	2 162	100.00

Authors' own elaboration (refers to all tables, unless otherwise stated).

4.2. Tour-operator structure by number of entities

The largest tour operators started up their activity relatively early on, some (23.7% of the total number, including Itaka, Rainbow Tours, Logos Tour and Mazurkas Travel) even before 1991, while others commenced with activity in subsequent five-year periods (e.g. Sun & Fun Holidays, Alfa Star, Oasis Tours and Ecco Holiday) up to 2005 inclusive (Figure 2). Relatively the most tour operators – 10 of them (26.3%) had come into operation in the years 1996-2000 (*i.a.* TUI Poland, Wezyr Holidays, Neckermann Polska, Exim Tours, GTI Travel Poland, Oskar and Funclub), but the differences from period to period are not marked. A statement that tour operators starting up with their activity earlier generally serve more customers and receive a greater amount of turnover, is not always fully confirmed.

However, since 2006 there have definitely been fewer newcomers functioning as large tourist companies. The gaining of a dominant position on a more and more saturated market takes longer, and winning trust and new customers is not easy at any stage.

Otherwise we know that there are continuous movements on the market, including the above mentioned bankruptcies which can be supposed to relate mainly to smaller and medium-size tour operators. In the first period (up to 1990), a characteristic feature was a slightly wider spatial dispersion of tour operators (Figure 3). Meanwhile, in the two last periods large new tour operators have commenced with their activities in the cities of Warsaw (7islands, Best Reisen Group, Citron Travel) and Poznań (Grecos Holiday) only.

In the offers of the tour operators it is foreign outward tourism that dominates, being available from some 65.8% of all the entities studied. Next in the ranking

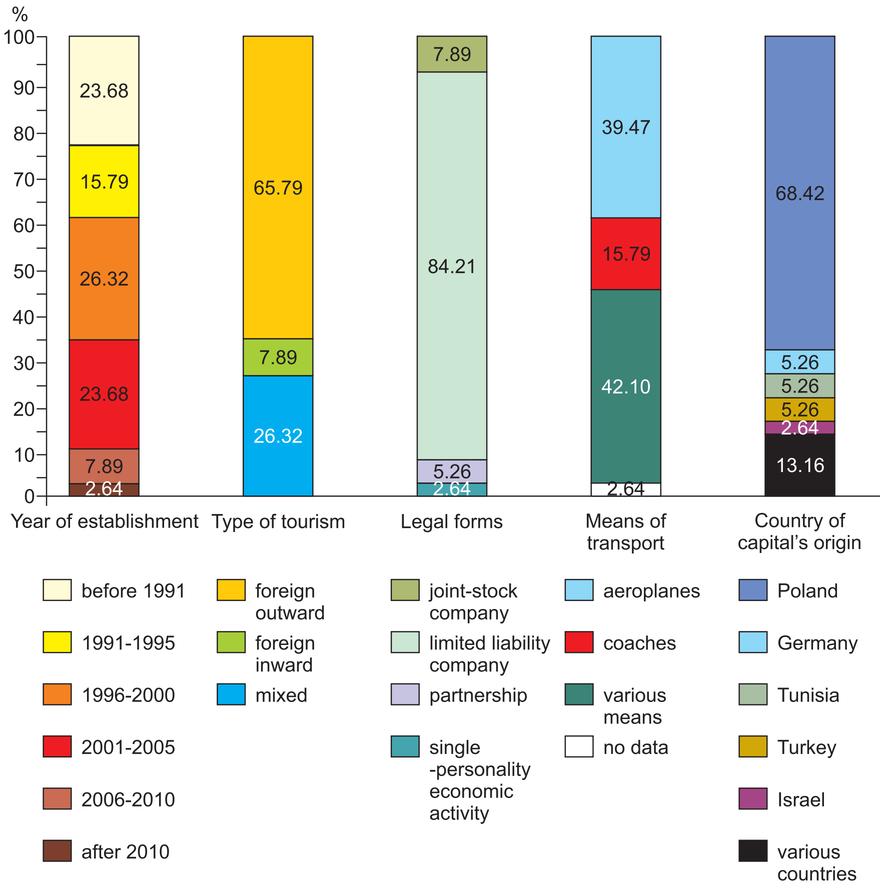


Fig. 2. Tour-operator structure by numbers, as of 31 December 2012

comes a 'mixed' offer comprising outward and inward tourism (most frequently foreign, but partly also domestic), which applies to some 26.3% of all companies. In turn, foreign inward tourism is in the offers of 7.9% of the firms. Large travel agencies specialising in foreign inward tourism have only been located in the cities of Warsaw (CB International, Travel Project) and Cracow (Jan Pol Incoming Tour Operator), while in all other centres tour operators have been involved either in foreign outward tourism or 'mixed' tourism (Figure 4).

Around the world, larger firms are normally registered as joint-stock companies, while in Poland even large firms are registered as limited liability companies. The founding of a limited liability company is easier and does not require such large inputs of capital. Hence, a majority (32 or 84.2%) of the tour operators researched are limited liability companies. Only 7.89% of the tour operators (Rainbow Tours, Exim Tours and Almatur Polska) are registered as joint-stock companies. Yet-smaller (at 5.26%) is the share of partnerships (Alfa Star and Logos Travel only) or single-personality economic activities (Biuro Turystyczne

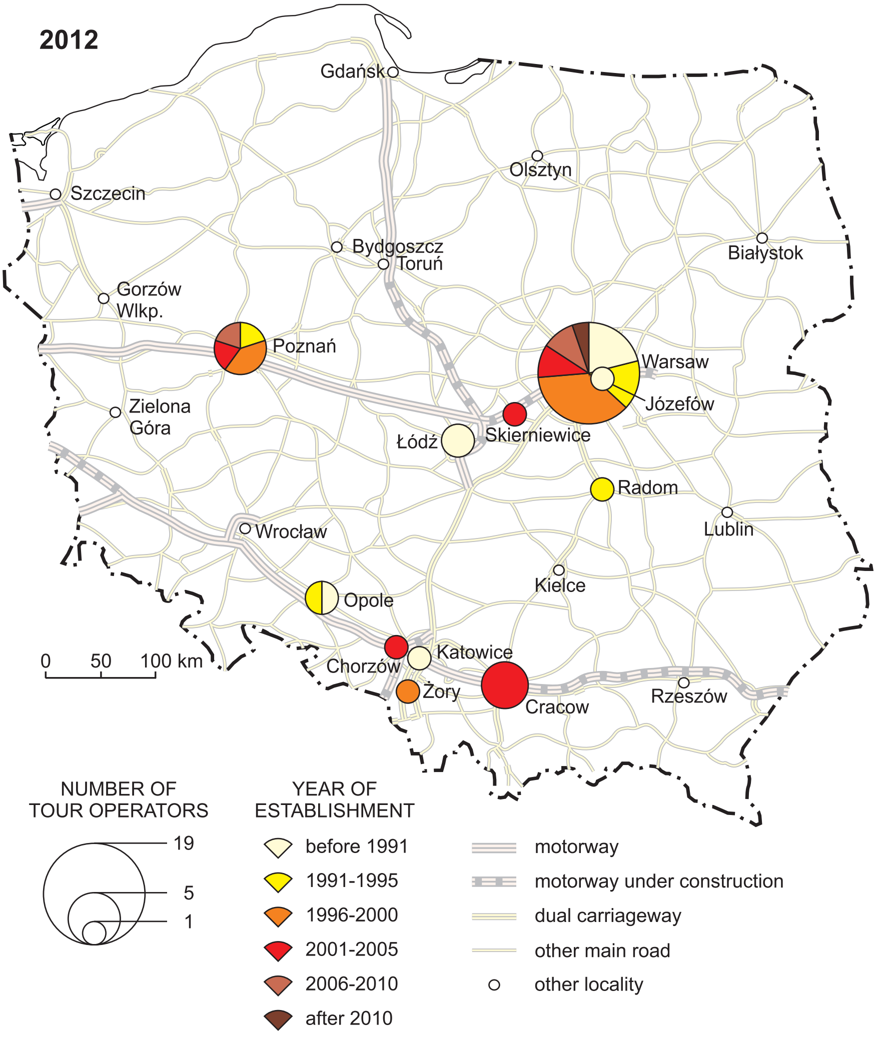


Fig. 3. Tour-operator structure by year of establishment of firm and number of entities

Olimp only)[7]. In each centre, even Warsaw, there are just one or at most two legal forms of tour operators (Figure 5).

Tour operators make use of various means of transport. A wider spectrum in this regard is applied by firms with seats in Warsaw, these being aeroplanes,

[7] However, when we take into account of all (and not merely the largest) travel agencies, an absolute majority of them are seen to belong to single persons – this is the so-called single-personality economic activity (Szymańska, 2009, p. 39). In their majority, these are small or very small entities. As Szymańska (2009, p. 39) writes, "as next could be mentioned limited liability companies" while other legal forms (associations, partnership, joint-stock companies) are met with only relatively rarely.

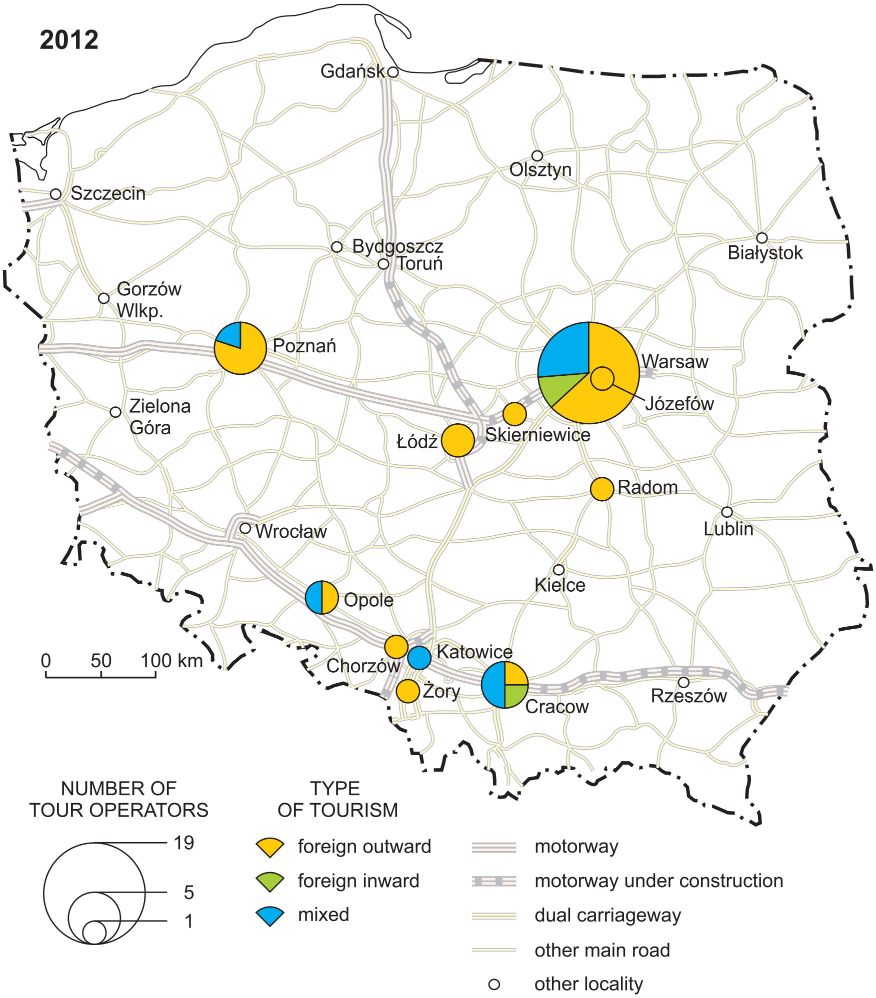


Fig. 4. Tour-operator structure by type of tourism on offer and number of entities

coaches and 'various' (Figure 6). The latter category concerns usage of different means of transport, above all aeroplanes and coaches simultaneously. Non-Warsaw tour operators, as a rule, use one means of transport. The nature of the tourist offer is obviously connected with the means of transport employed. By far the most important category is aeroplanes (used by 39.5% of firms), as compared with coaches (15.8%), though the share of 'various' means of transport (at 42.1%) is still-greater, in the case of the same tour operator.

Tour operators can also be characterised by the country of origin of the capital. A majority of companies are Polish ones (26, or 68.4%). Two firms (5.3%) are of German origin (TUI Poland and Neckermann Polska), two from Tunisia (Sun & Fun Holidays and Oasis Tours), another two from Turkey (GTI Travel Poland and

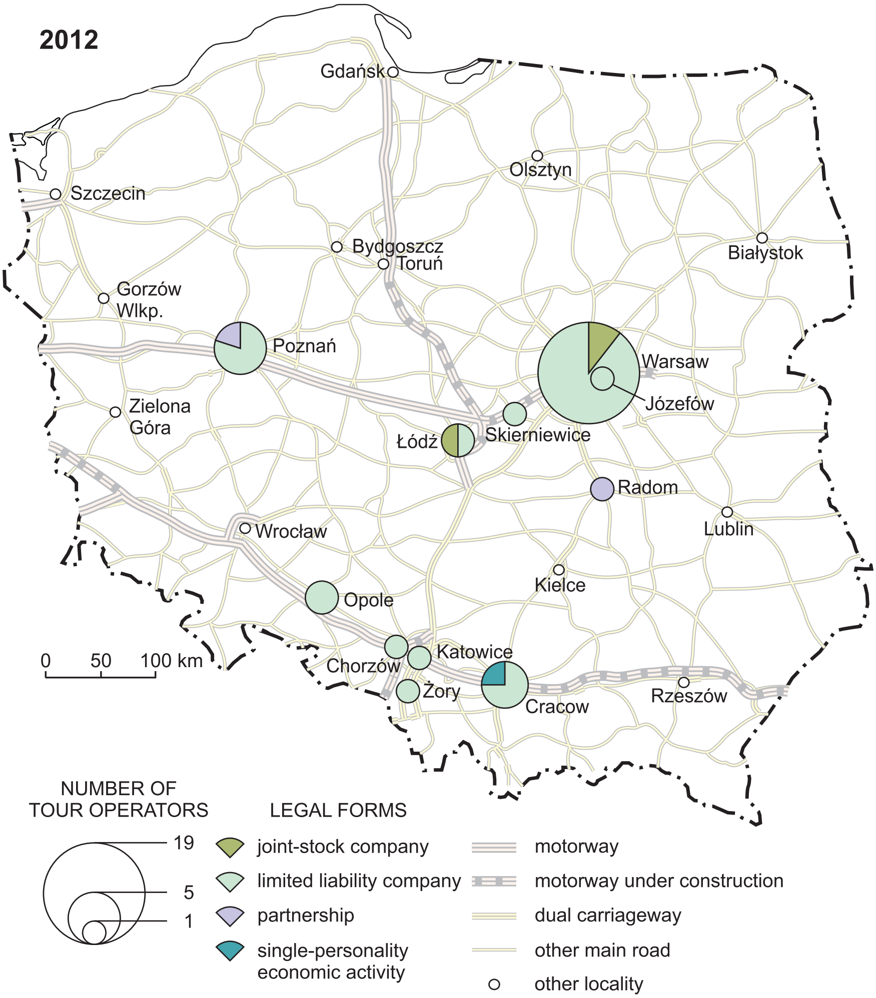


Fig. 5. Tour-operator structure by legal form and number of entities

Citron Travel), and one from Israel (CB International). Five tour operators (13.2%) have 'mixed' origin capital, i.e. from more than one country (Wezyr Holidays from Russia, Turkey, Belarus and Ukraine; Exim Tours from the Czech Republic and Germany; Viva Club Polska from Poland and Tunisia; Best Reisen Group from Poland and Egypt; Travel Project from Poland and Germany). Again, the most differentiated in terms of the origin of capital are the Warsaw tour operators (Figure 7). Non-Warsaw firms have domestic capital. The only exception is Viva Club Polska of Chorzów with mixed Polish-Tunisian capital.

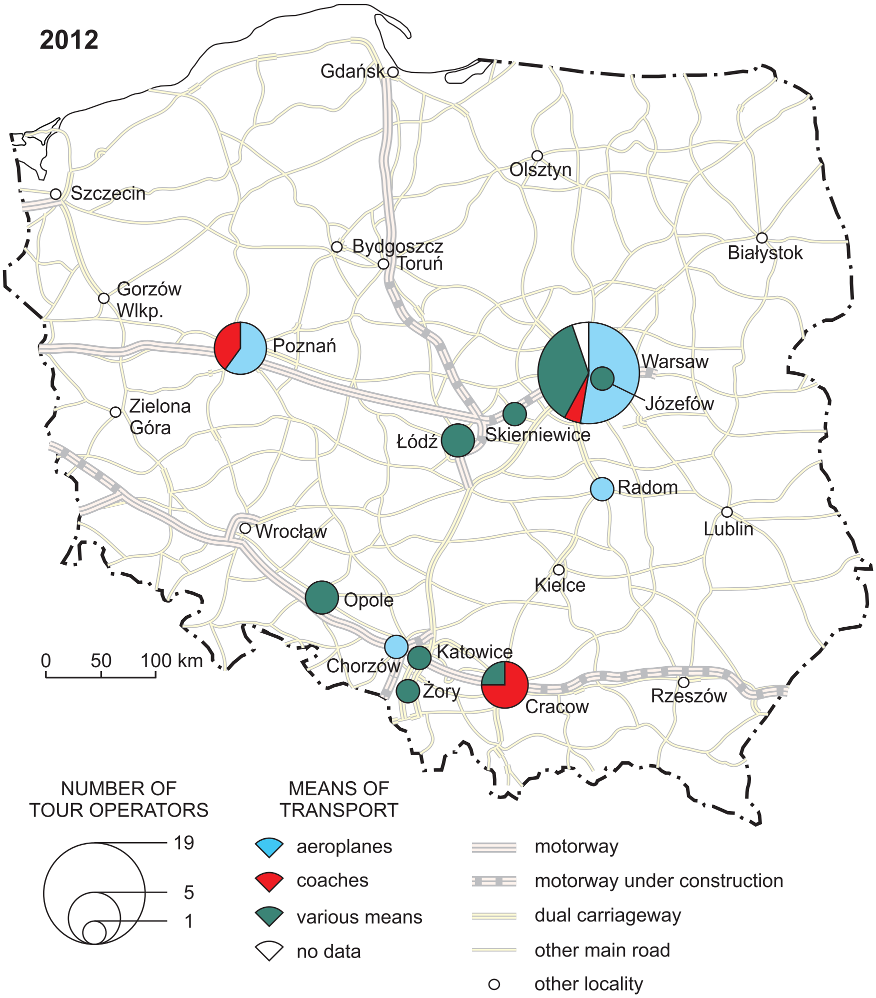


Fig. 6. Tour-operator structure by means of transport and number of entities

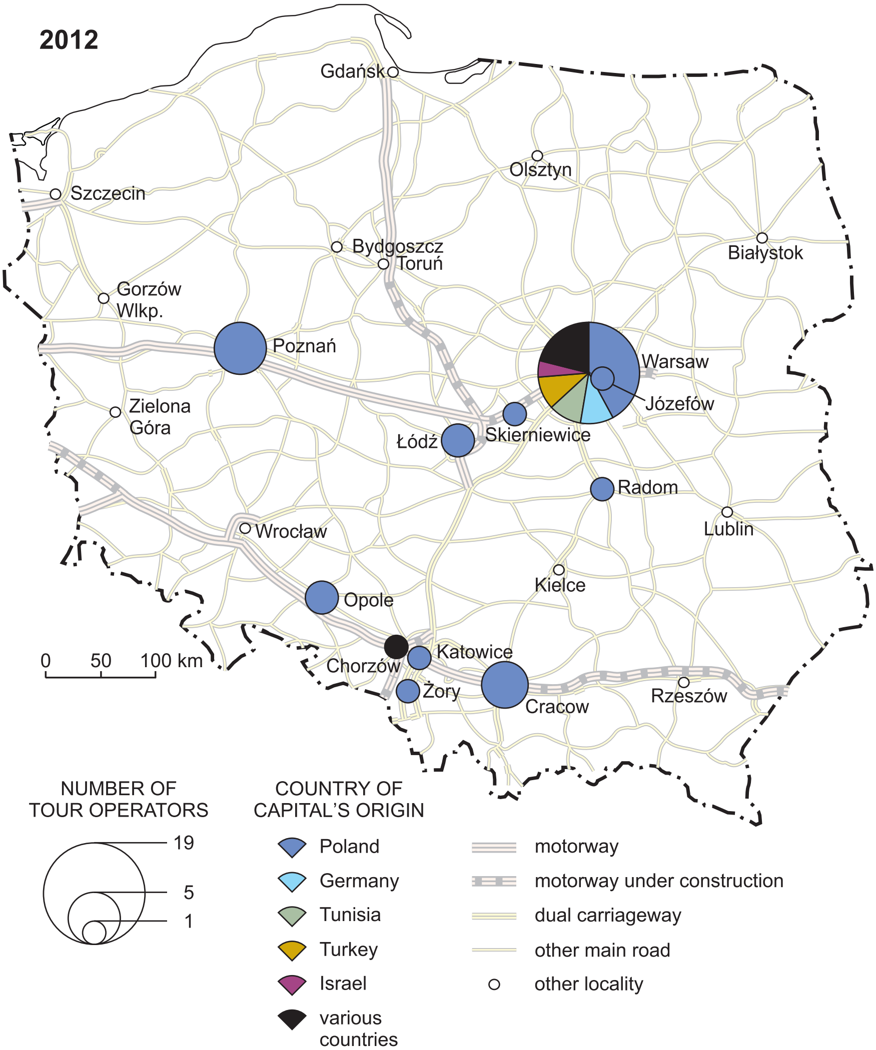


Fig. 7. Tour-operator structure by country of origin of capital and number of entities

4.3. Tour-operator structure by turnover from the organising of tourist events

Tour-operator structure seen by turnover from the organising of tourist events looks different. Turnover would seem to be the best possible measure by which the sizes of tourist agencies can be characterised (Figure 8).

The bulk of tour operators with the largest turnover had started up their activity before the end of the first period, i.e. by 1990 (41.1%). These are first and foremost the above mentioned very large tour operators, such as Itaka or Rainbow Tours, but

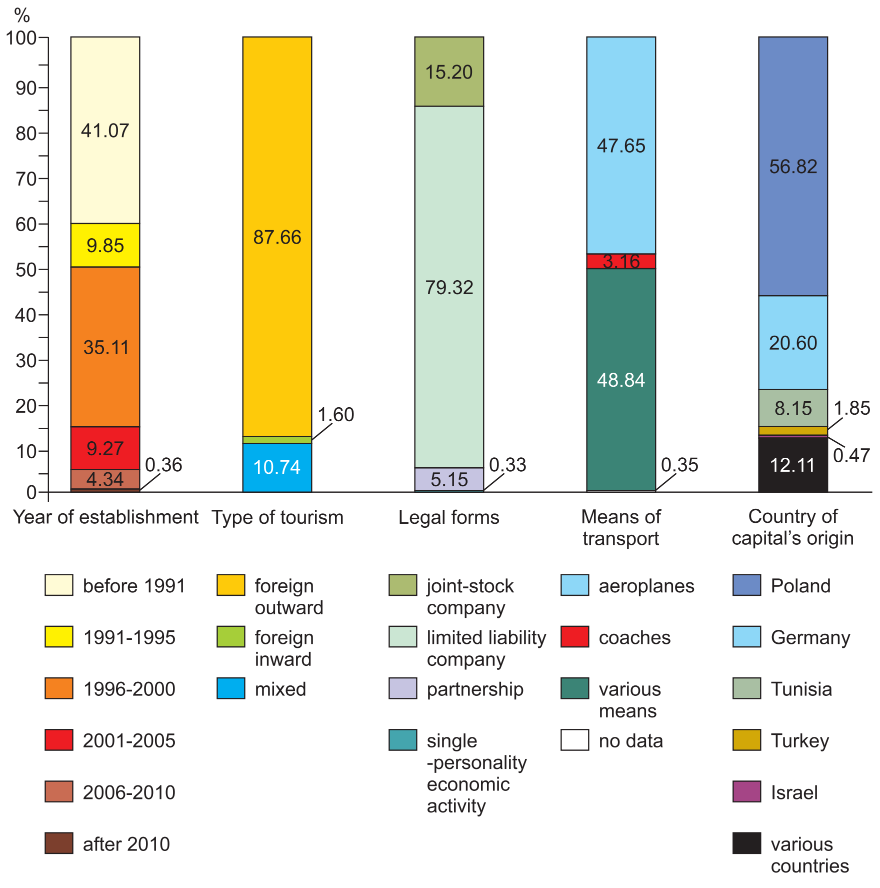


Fig. 8. Tour-operator structure by turnover from the organising of tourist events

Own elaboration based on: (1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*; (3) www.infoveriti.pl; (4) websites of tour-operators.

also some of medium size (Almatur Katowice and Trade & Travel of the city of Łódź, Almatur Polska, Logos Tour, Sigma Travel and Mazurkas Travel of Warsaw, and Atas of Józefów near Warsaw). Slightly lower overall turnover (35.1%) is achieved by firms established in the years 1996-2000 (above all ones like TUI Poland, Wezyr Holidays, Neckermann Polska, Alfa Star and Exim Tours), which is to say in the period of the biggest boom in start-ups of new tour operators. In the latter case, the number of newly-created firms is partly confirmed in the size of turnover achieved, with the turnover of companies established in other periods being noticeably lower. The spatial distribution of seats of tour operators achieving the highest turnovers is very characteristic: Warsaw firms have a joint turnover of 2.02 billion zloties, with those from Opole on 1.16, and third-placed Łódź on just 0.48 bn zloties (Figure 9). Turnover achieved in the remaining centres is (far) lower still.

Foreign outward tourism absolutely dominates in terms of the level of turnover achieved (taking some 87.7% of the total). Second place is taken by 'mixed' tourism (just 10.7%), while inward tourism is responsible for just 1.6% of all turn-

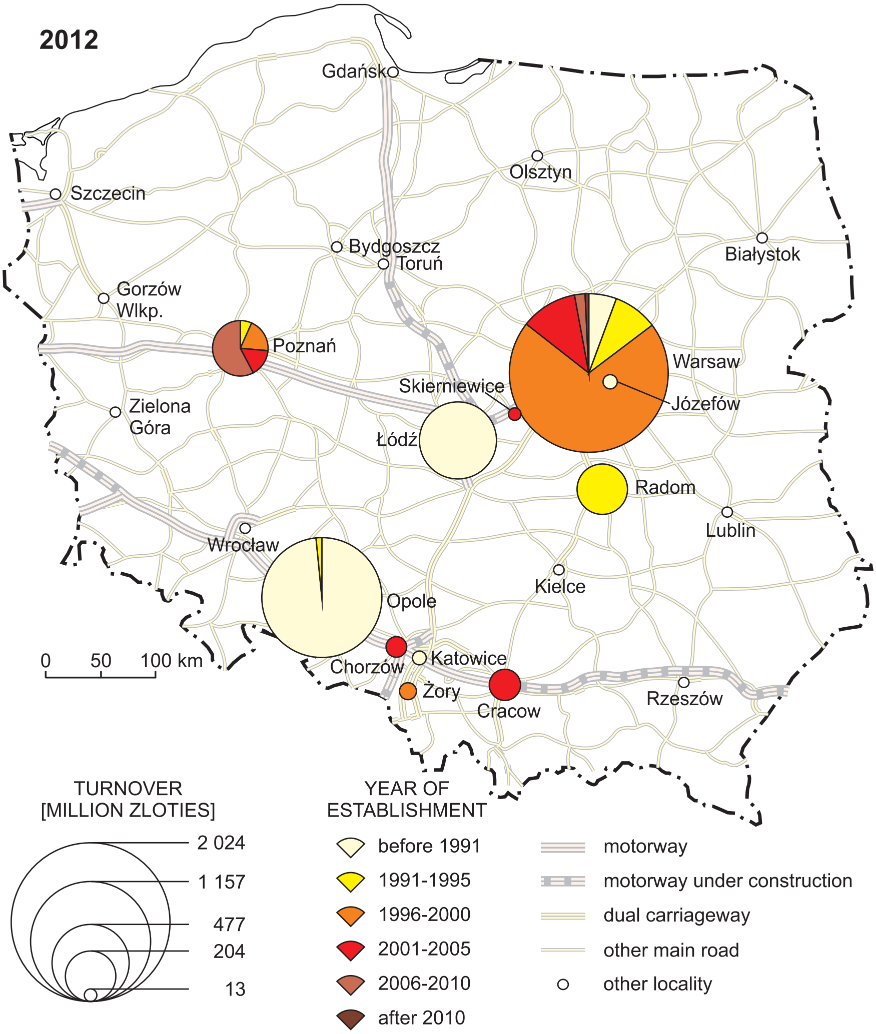


Fig. 9. Tour-operator structure by year of establishment of firm and turnover from the organising of tourist events

Own elaboration based on: (1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*; (3) www.infoveriti.pl; (4) websites of tour-operators.

over (Figure 8). Such a distribution confirms the fact that Poland is first and foremost a country ‘exporting’ tourists, while inward tourism accounts for only a small share of overall tourist traffic. Since a bulk of turnover (and probably profits) comes from foreign outward tourism participated in by Polish citizens, all major travel agencies are extremely active in this sort of operation. Tour operators involved in foreign outward and inward tourism simultaneously have their seats in the cities of Warsaw (Logos Tour, Furnel Travel and Mazurkas Travel), Poznań

(Ecco Holiday), Cracow (Wygoda Travel) and Opole (Almatur Opole). Few travel agencies also take part in domestic outward tourism, this being just a part of the activity of such tour operators as Neckermann Polska, Almatur Polska, Almatur Katowice and Skarpa Travel (Figure 10).

A majority of turnover (79.3%) is achieved by tour operators registered as limited liability companies, and their seats are located in almost every city researched. Joint-stock companies make a 15.2% contribution to overall turnover, with partnerships accounting for some 5.15% (Figure 8). Joint-stock companies have their seats located in the cities of Łódź (Rainbow Tours) and Warsaw (Exim Tours, Almatur Polska), while partnerships are in the cities of Radom (Alfa Star) and

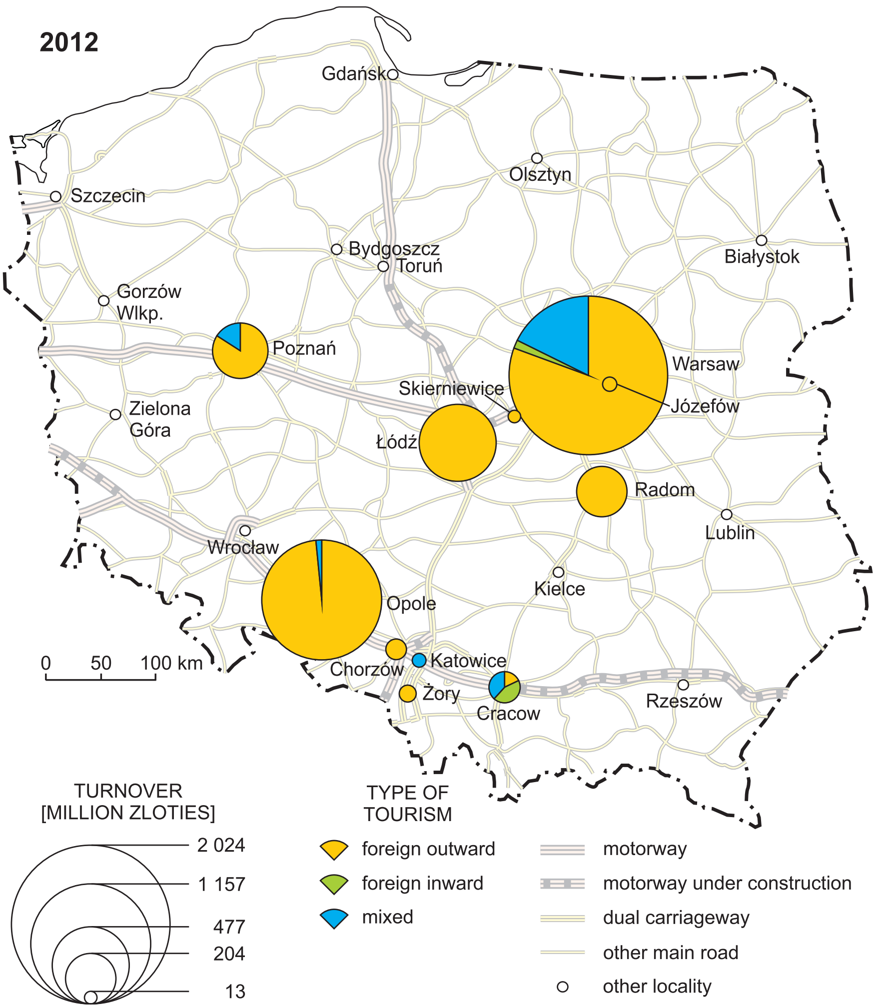


Fig. 10. Tour-operator structure by type of tourism on offer and turnover from the organising of tourist events

Own elaboration based on: (1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*; (3) www.infoveriti.pl; (4) websites of tour-operators.

Poznań (Logos Travel). Single-personality economic activity is represented by the Olimp tour operator, in the city of Cracow only.

The use of aeroplanes and 'various means of transport' are in similar positions when it comes to turnover resulting from the organisation of tourist transactions (47.7 and 48.8%, respectively). However, it should be recalled that the 'various' category encompasses aircraft, too. What is clearly seen is the more limited (3.2%) role of coaches as a means of transport contributing to turnover arising out of the organisation of the tourist events. Thus, the situation as of 2012 (Figure 8) is quite different from that observed in the 1990s, for example, when Poles participated in coach excursions to a far greater extent.

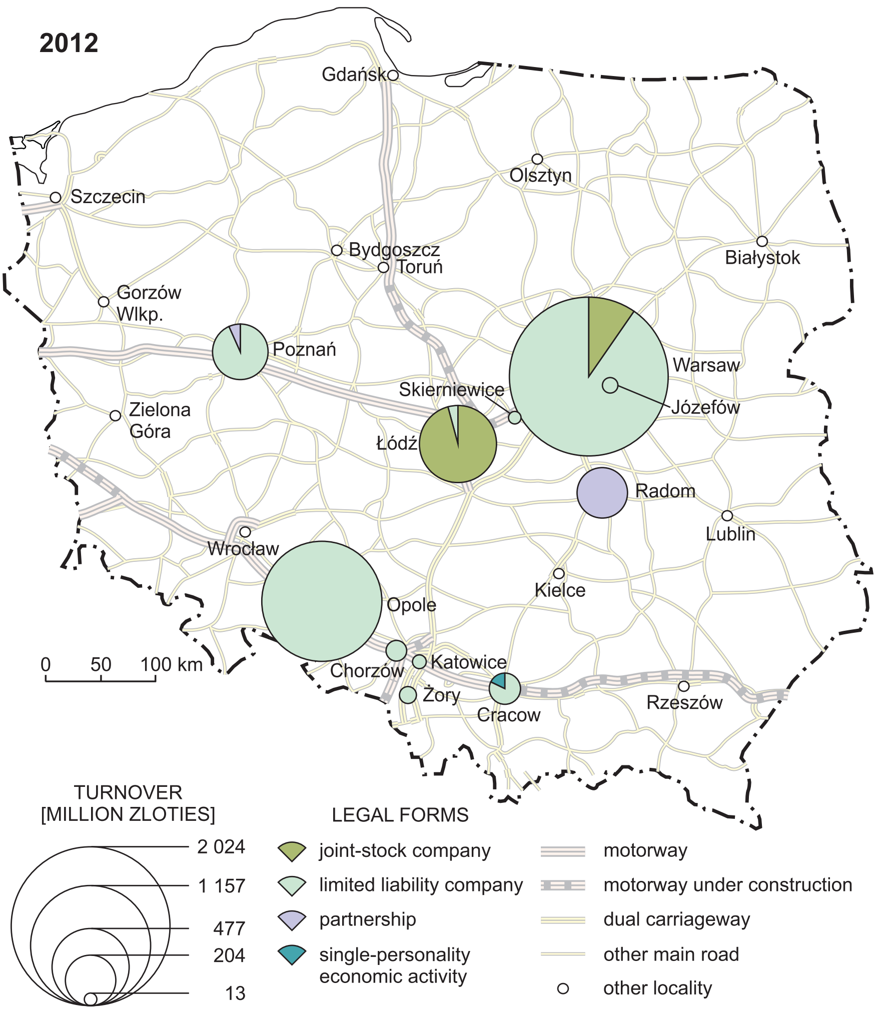


Fig. 11. Tour-operator structure by legal form and turnover from the organising of tourist events

Own elaboration based on: (1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*; (3) www.infoveriti.pl; (4) websites of tour-operators.

Of great interest is the situation among Warsaw-based tour operators: these use aeroplanes first and foremost (achieving 79.3%), followed by 'various means of transport' (17%), and coaches (1.4%). Where city of Poznań tour operators are concerned, aeroplanes again dominate (80%), while in Cracow the situation is quite different, with coaches on 75.2%. In the case of the tour operators whose seats are located elsewhere, only one category of means of transport is used. In the cities of Opole, Łódź, Żory, Katowice and Józefów it is 'various means of transport' that are involved, while in the cities of Radom and Chorzów – aeroplanes (Figure 12).

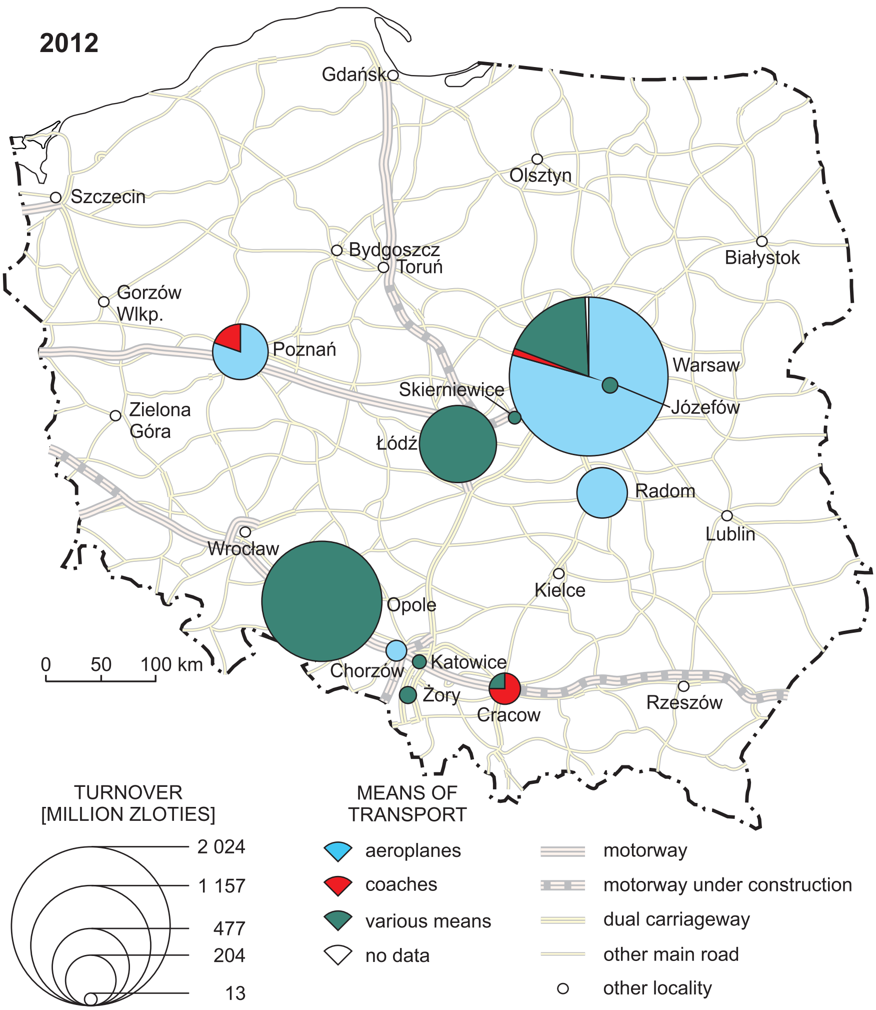


Fig. 12. Tour-operator structure by means of transport and turnover from the organising of tourist events

Own elaboration based on: (1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*; (3) www.infoveriti.pl; (4) websites of tour-operators.

When tour-operator structure is concerned in terms of country of origin of capital and the level of turnover resulting from the organisation of tourist events (Figure 8), it is seen that a majority of capital allocated comes from Poland (56.8%), followed by Germany (20.6%) and Tunisia (8.15%). Once more, the most interesting situation is that applying to Warsaw. Apart from Polish capital (10.2%), there is located German capital (43.7%), Tunisian (17.3%), Turkish (3.9%), Israeli (1%), while the remainder is 'mixed' capital. At other centres, the whole of the turnover can be the result of investment of Polish capital (a majority in the cities of Opole, Łódź, Poznań and Radom, and less so in other centres), and in city of Chorzów 'mixed' (Figure 13).

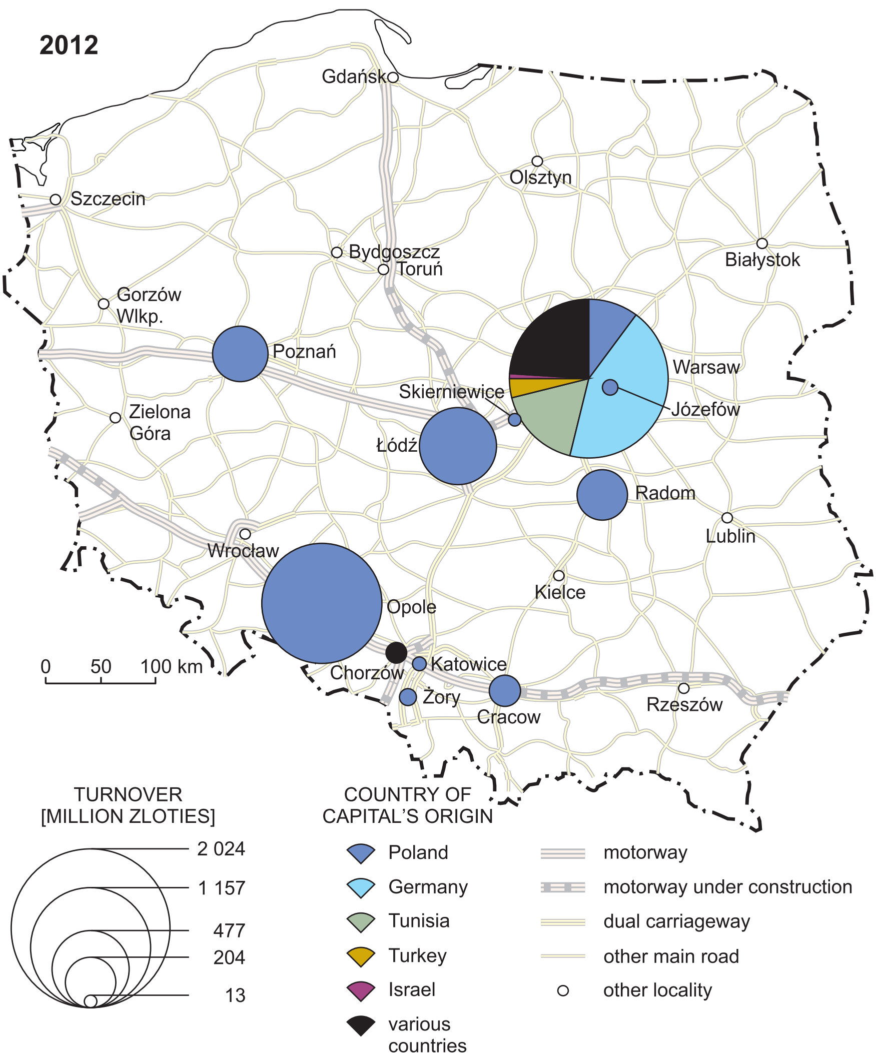


Fig. 13. Tour-operator structure by country of origin of capital and turnover from the organising of tourist events

Own elaboration based on: (1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*; (3) www.infoveriti.pl; (4) websites of tour-operators.

4.4. Tour-operator structure by numbers of customers served

Overall, tour-operator structure by numbers of customers served is close to that described above for turnover resulting from the organisation of tourist transactions, as has already been confirmed by reference to statistically significant linear interdependence (cf. Chapter 4.1). On the scale of the country as a whole, the most successful noting for customers (39.4% of the total) served is achieved by the firms established in the first period considered, as followed by those from the years 1996-2000 (32.2%). It is true to say that for both of these time-intervals dominance in terms of the numbers of travellers is rather less marked than in regard to level of turnover, though the differences do not achieve significance (Figure 14).

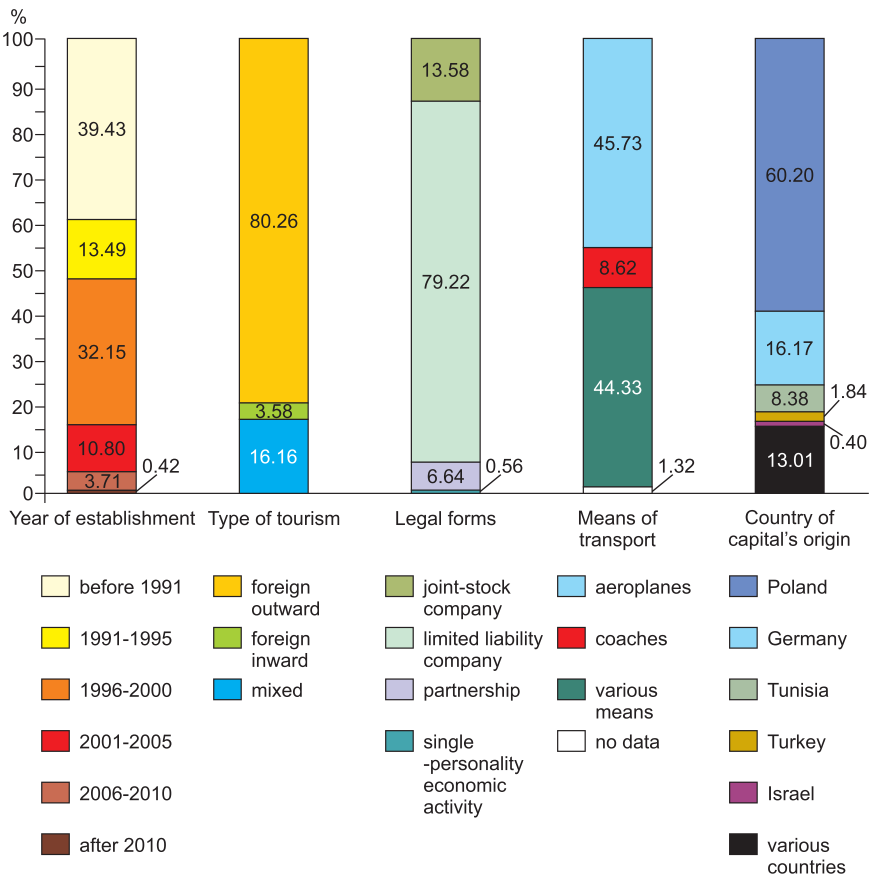


Fig. 14. Tour-operator structure by numbers of customers, as of 31 December 2012

Own elaboration based on: (1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*; (3) www.infoveriti.pl; (4) websites of tour-operators.

The greatest variety of firms where time of establishment is concerned characterises the tour operators located in Warsaw. Their companies originate from all of the time intervals studied. However, the most major group of customers (61%) comprises those served by tour operators commencing with their activity in the years 1996-2000, which is to say during the tourism boom time. Poznań-seated firms were founded over four of the periods of time, though since their numbers of customers are just 136,800 serviced, it is nothing more than a medium-size category that is being considered. More customers have been gained by two tour operators seated in the city of Opole (490,000), which were established respectively in 1989 (Itaka) and 1992 (Almatur Opole). All the tour operators whose seats are elsewhere (Łódź, Radom and other smaller localities) started up in their activity at approximately the same time, though not always in a similar period (Figure 15).

Taking into account the Poland-wide level of participation in tourism events, it is possible to note the enormous prevalence of foreign outward tourism (80.3%) over 'mixed' tourism (16.2%), and especially over foreign inward tourism (3.6%). The foremost position of the city of Warsaw is clear in all categories (Figure 16). Otherwise, it is only in Cracow that all three categories are also visible, though of course with a number of clients served that is only a fraction of that noted for Warsaw-based operators. Travel agencies in the cities of Opole and Poznań in turn serve foreign outward customers as well as outward and inward travellers. Elsewhere, it is just one type of tourism (above all foreign outward) that is engaged in. The greatest numbers of tourists are served by tourist agencies seated in the cities of Warsaw (1,018,000), Opole (490,000) and Łódź (214,000).

A majority of customers (79.2%, or 1,683,000) are served by tour operators registered as limited liability companies, as compared with joint-stock companies (13.6%, or 289,000), partnerships (6.6%, or 141,000) or single-person firms (12,000). The relevant circumstances of individual centres rather resemble those identified in line with turnover resulting from the organisation of tourist transactions. In the city of Opole all customers and in Warsaw an absolute majority are served by limited liability companies, while in the case of Łódź it is joint-stock companies that are in a majority, and in Radom partnerships. Other centres are as presented in Figure 17.

An absolute majority of tourists (45.7%) choose aeroplanes as means of transport. If we add to this 'various means of transport' (accounting for 44.3%) – knowing that aircraft also prevail in this category), then this means of transport is seen to be yet more dominant. In contrast, coaches are used by only 8.8% of tourists, again also partly as a category of 'various' means of transport (Figure 14).

In individual centres the situation is much differentiated (Figure 18). All customers of the Radom based Alfa Star firm (136.4 thousand) and Chorzów Viva Club Polska (16.7 thousand), and also an absolute majority of Warsaw (730,400) and Poznań (88,400) are choosing aeroplanes as their means of transport. Likewise, all clients of agencies with seats in Opole (490,000 people) and Łódź (214,000) travelled by 'various' means of transport, where this is known to denote aircraft first and foremost. Coaches play a somewhat more notable role in the tourist tours organised by operators based in Warsaw, Cracow and Poznań.

60.2% of tourists have been customers of tour operators with national capital, 16.2% those with capital of German origin. These are followed by 8.4% of tourists who have been served by Tunisian operators, and 13% whose operators were of 'mixed' origin, i.e. hailing from more than one country (Figure 14). In all

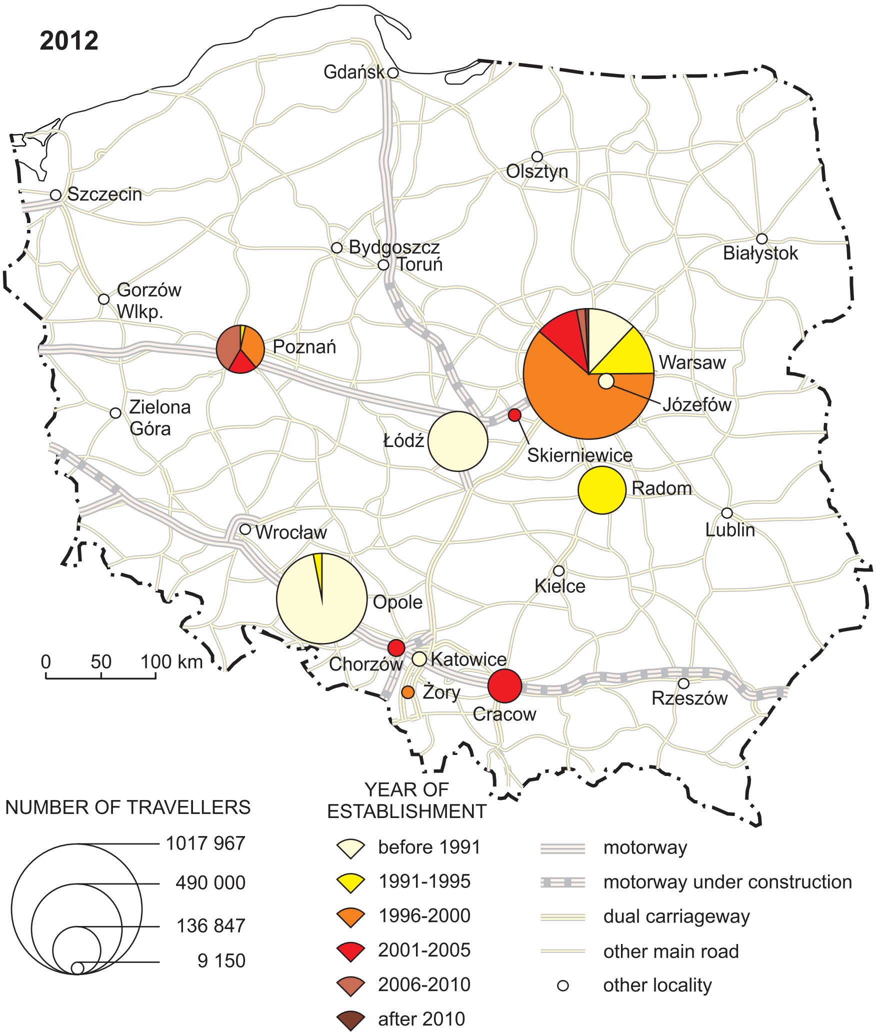


Fig. 15. Tour-operator structure by year of establishment of firm and numbers of customers

Own elaboration based on: (1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*; (3) www.infoveriti.pl; (4) websites of tour-operators.

localities other than Warsaw and Chorzów, users have exclusively been customers of tour operators with Polish capital. In this group, a majority of customers (490,000) have been served by travel agencies seated in Opole, as followed by Łódź (214,000), Poznań (137,000), and Radom (136,000). In the case of the city of Warsaw, a majority of customers (343,600) have been served by tour operators with capital of German origin (TUI Poland, Neckermann Polska), with these being followed in order of importance by companies with mixed capital (serving

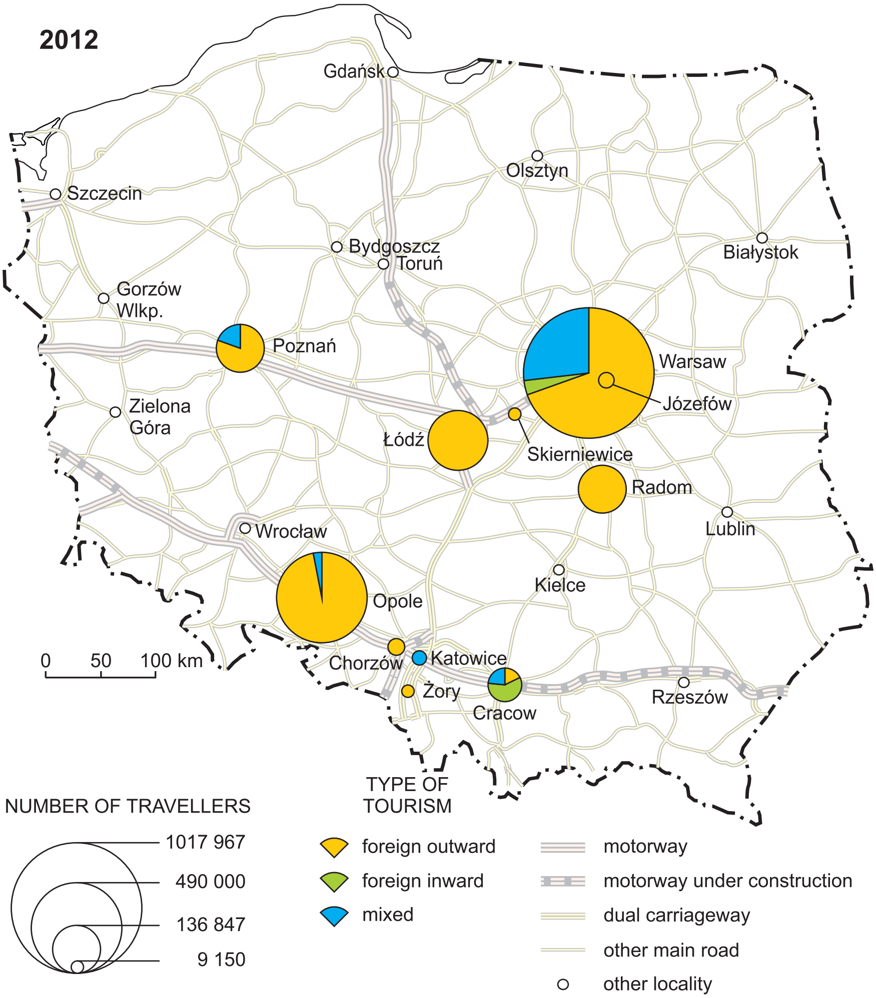


Fig. 16. Tour-operator structure by type of tourism on offer and numbers of customers

Own elaboration based on: (1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*; (3) www.infoveriti.pl; (4) websites of tour-operators.

259,700), or else origins that are Polish (189,000), Tunisian (178,000) or Turkish (39,000). A tour operator in Chorzów (Viva Club Polska) with mixed Polish-Tunisian capital has served 16,700 customers (Figure 19).

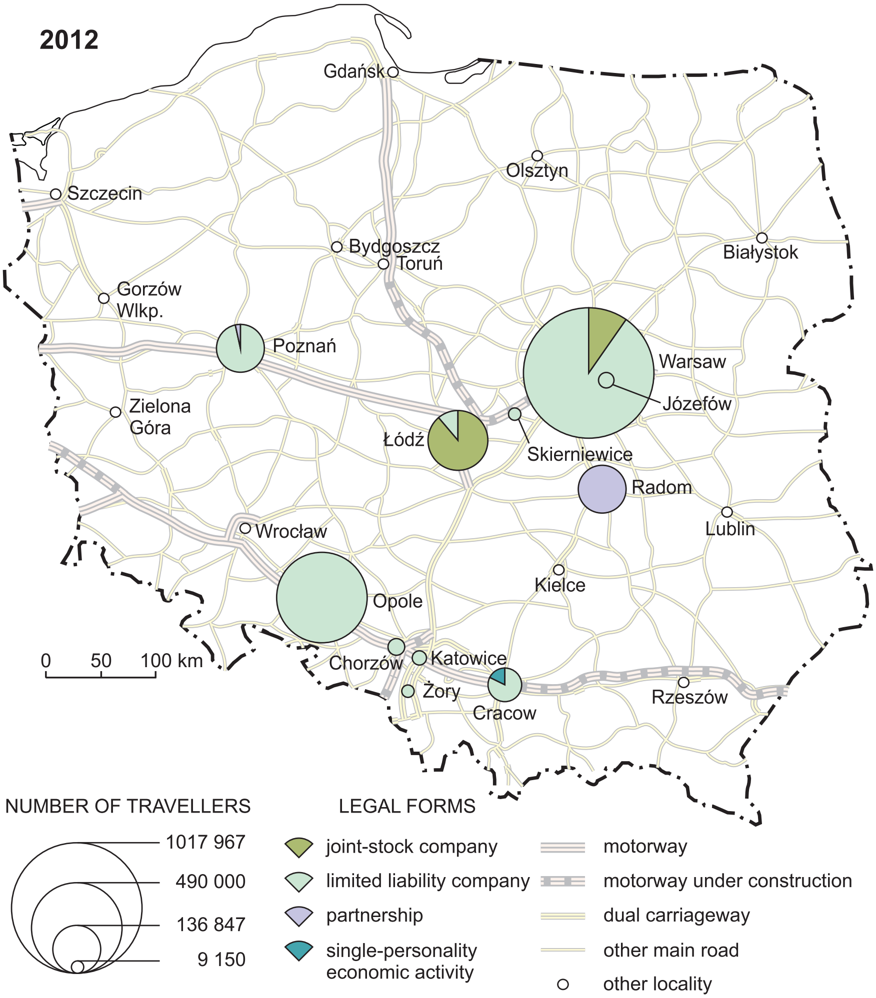


Fig. 17. Tour-operator structure by legal form and numbers of customers

Own elaboration based on: (1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*; (3) www.infoveriti.pl; (4) websites of tour-operators.

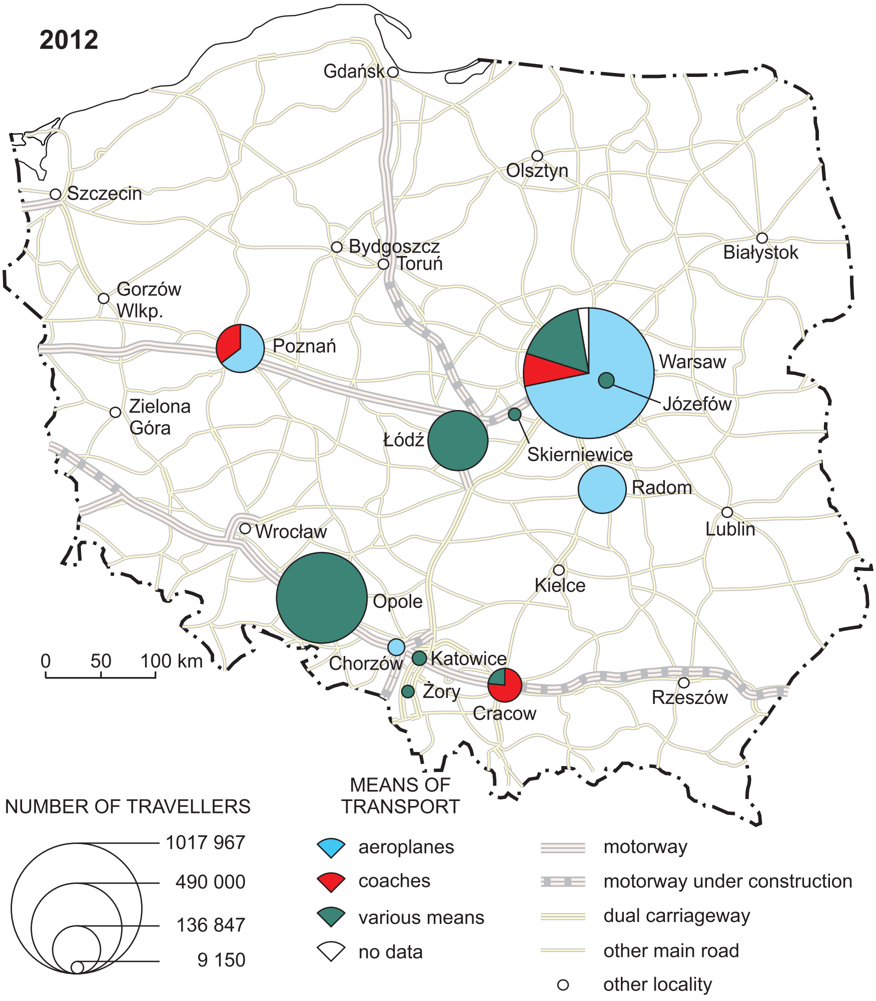


Fig. 18. Tour-operator structure by means of transport and numbers of customers

Own elaboration based on: (1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*; (3) www.infoveriti.pl; (4) websites of tour-operators.

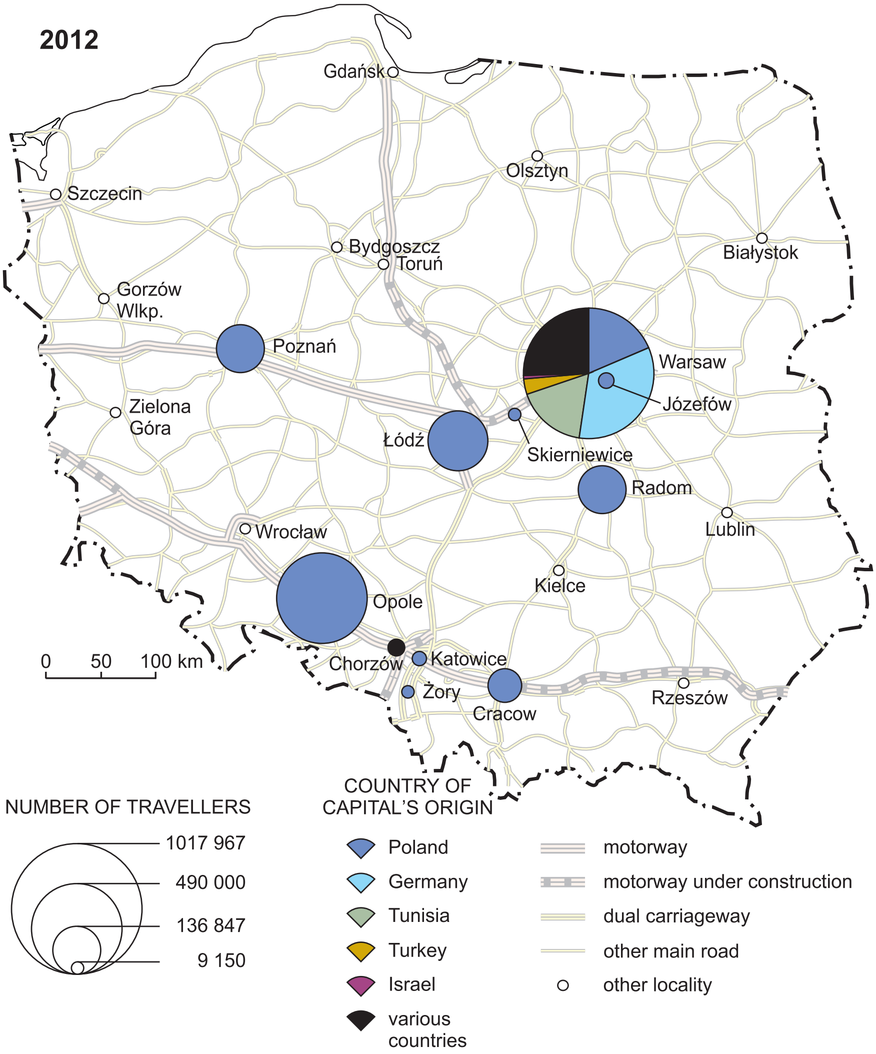


Fig. 19. Tour-operator structure by country of origin of capital and numbers of customers for organised tourist events

Own elaboration based on: (1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*; (3) www.infoveriti.pl; (4) websites of tour-operators.

4.5. Tour-operator structure by numbers employed

The largest share of employment (43.4% of the total) is taken by firms established before 1991, followed by those set up between 1996 and 2000 inclusive (30.9%). This is generally aligned with the statistics for both turnover and numbers of customers served, but does not correspond with numbers of tour operators (which are disproportionately smaller). In other periods analysed, the respective shares in employment are much smaller, especially in the latter two periods (Figure 20), but there are far fewer newly-established firms. As far as the earliest period was concerned, it was most probable that some tour operators were over-employed – as is characteristic for firms established in the period of the centrally-planned economy.

The overall largest numbers employed characterise Warsaw-based tour operators (1140 staff), and after them firms seated in Łódź (307), Opole (256) and

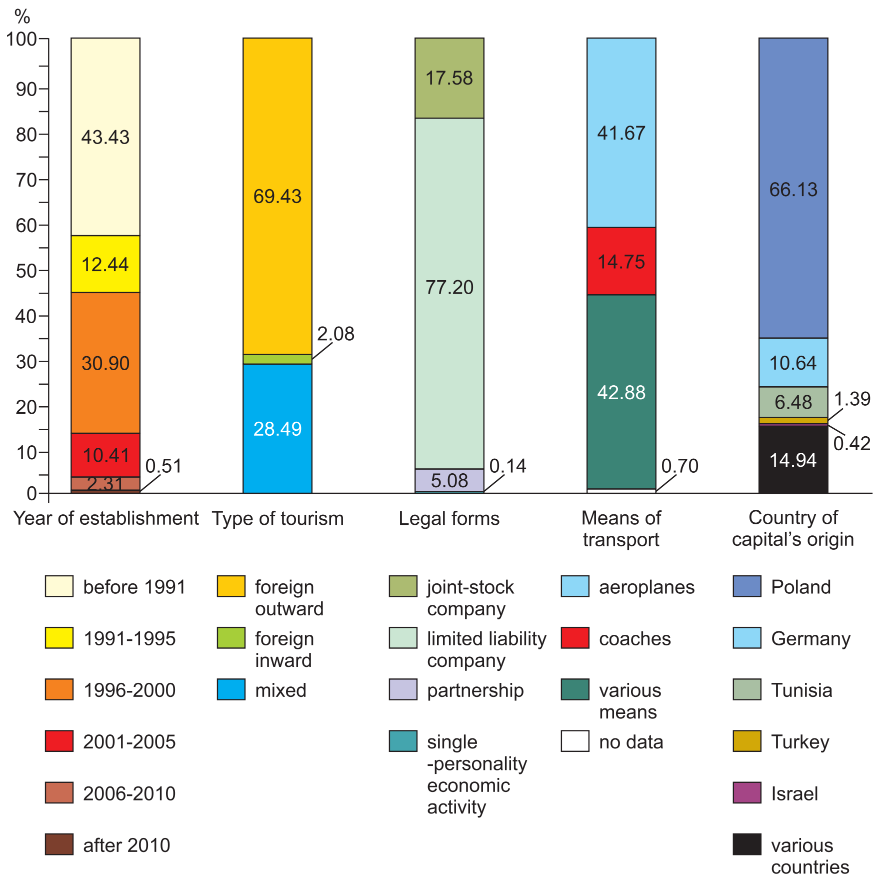


Fig. 20. Tour-operator structure by numbers employed, as of 31 December 2012

Own elaboration based on: (1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*; (3) www.infoveriti.pl; (4) websites of tour-operators.

Poznań (235). The concentration of employment observed is greater than in the case of numbers of tour operators, or their turnover, or the numbers of customers served. In other localities the numbers employed does not exceed several dozens of people (Figure 21), the total number of employees at the 38 tour operators researched is 2162.

Tour operators specialised in foreign outward tourism employ 69.4% of staff, 'mixed' ones 28.5% and foreign inward tourism just 2.1% (Figure 20). The latter is almost invisible in Warsaw and Cracow, while foreign outward tourism abso-

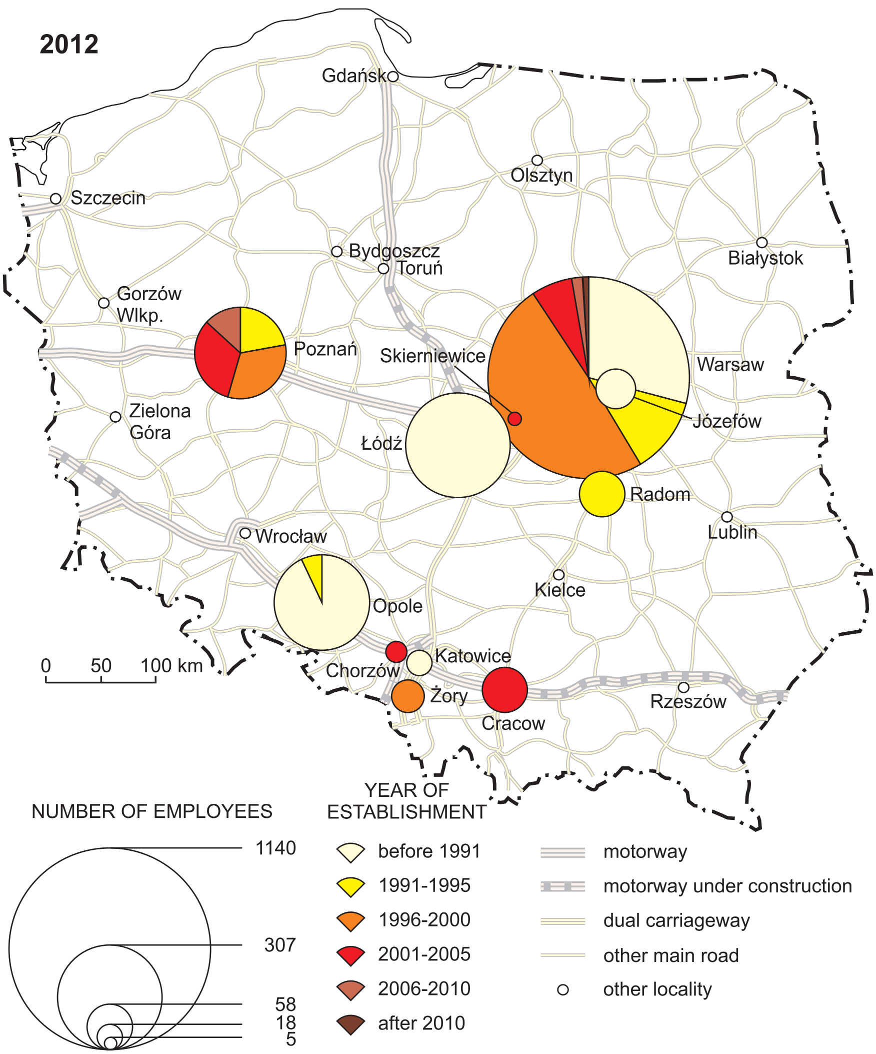


Fig. 21. Tour-operator structure by year of establishment of firm and numbers employed

Own elaboration based on: (1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*; (3) www.infoveriti.pl; (4) websites of tour-operators.

lutely dominates in terms of employment in the cities of Warsaw (645 people), Łódź (307), Opole (238), Poznań (159) and some smaller centres. Also high are the shares of employment in 'mixed' tourism, particularly in Warsaw, Poznań and Cracow (Figure 22).

Taking into account the numbers employed, the share accounted for by limited liability companies is slightly smaller (77.2%), as compared with the respective numbers of tour operators, turnover resulting from the organising of tourist events and numbers of customers served. However, the share of joint-stock companies in employment is larger (17.6%) than one would expect from other

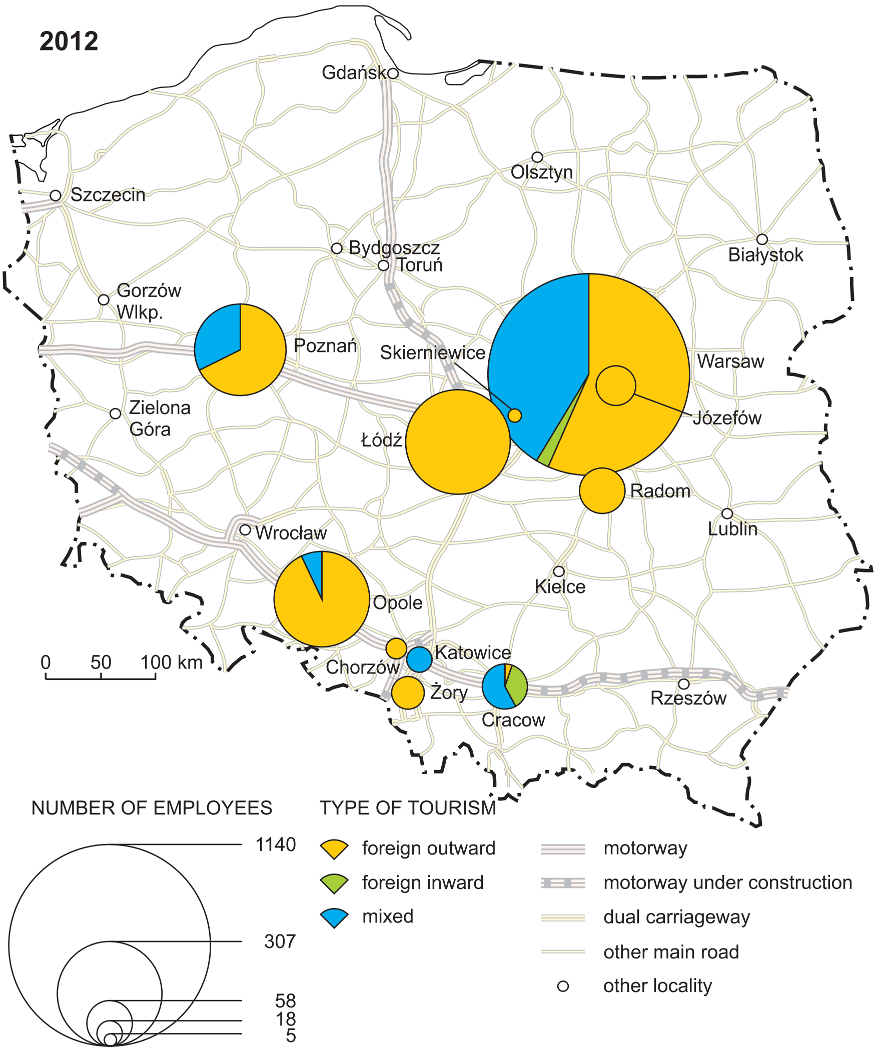


Fig. 22. Tour-operator structure by type of tourism on offer and numbers employed

Own elaboration based on: (1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*; (3) www.infoveriti.pl; (4) websites of tour-operators.

indices (Figure 20), something that is in line with certain expectations. The spatial distribution of legal forms by employment in different centres is presented in Figure 23.

Where numbers employed are concerned, the shares taken by aeroplanes (41.7%) and various means of transport (42.9%) are slightly smaller than in the case of turnover resulting from the organisation of tourist events and numbers of customers, but slightly greater than in regard to the numbers of tour operators (Figure 20). Where consideration is given to employment, there is found to be a larger share accounted for by coaches (14.8%) than is the with the inclusion of

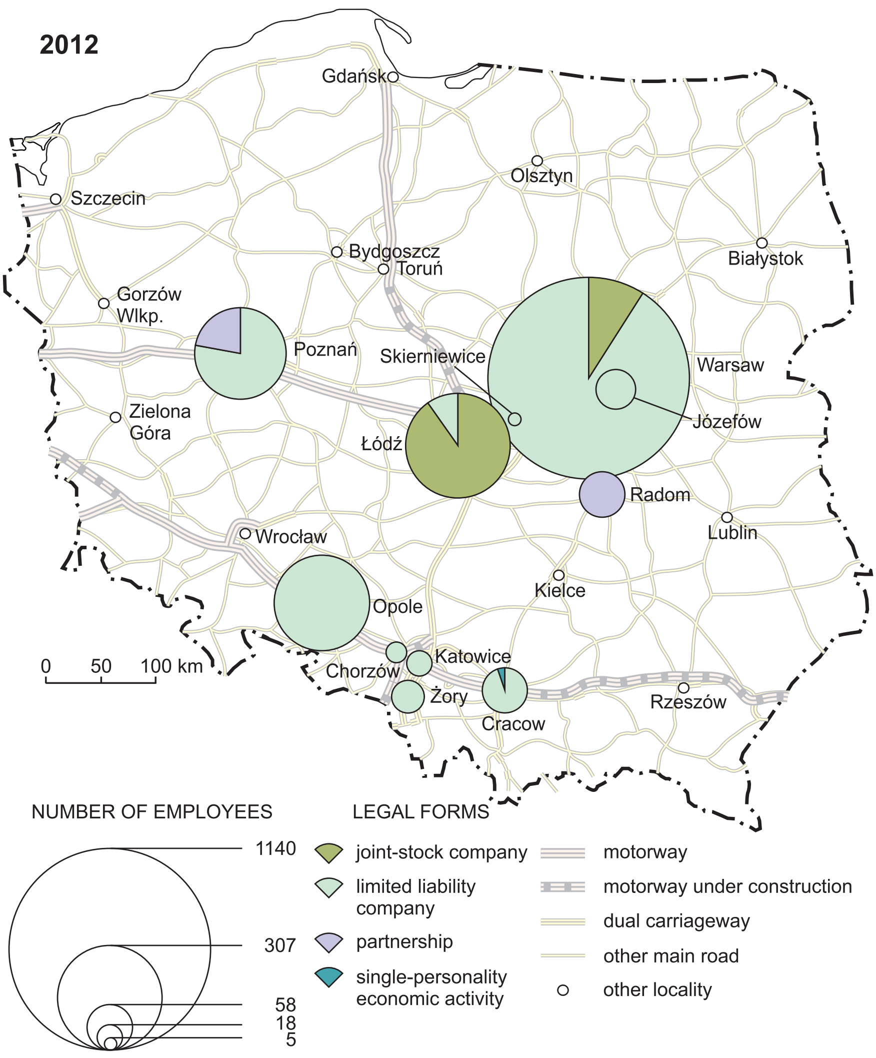


Fig. 23. Tour-operator structure by legal form and numbers employed

Own elaboration based on: (1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*; (3) www.infoveriti.pl; (4) websites of tour-operators.

other indices (with the exception of numbers of firms) what is fully understandable taking into account a specifity of coach transport. Employment in the four most important centres (cities of Warsaw, Łódź, Opole and Poznań), being the seats of tour operators presents bigger inner differentiation than in the case of other measures applied (Figure 24).

The level of employment with tour operators in the ownership of national capital (66.1%) is slightly higher than their respective shares in turnover resulting from an organisation of the tourist events and numbers of customers but smaller than a share in the numbers of firms. In turn, there is smaller share in employ-

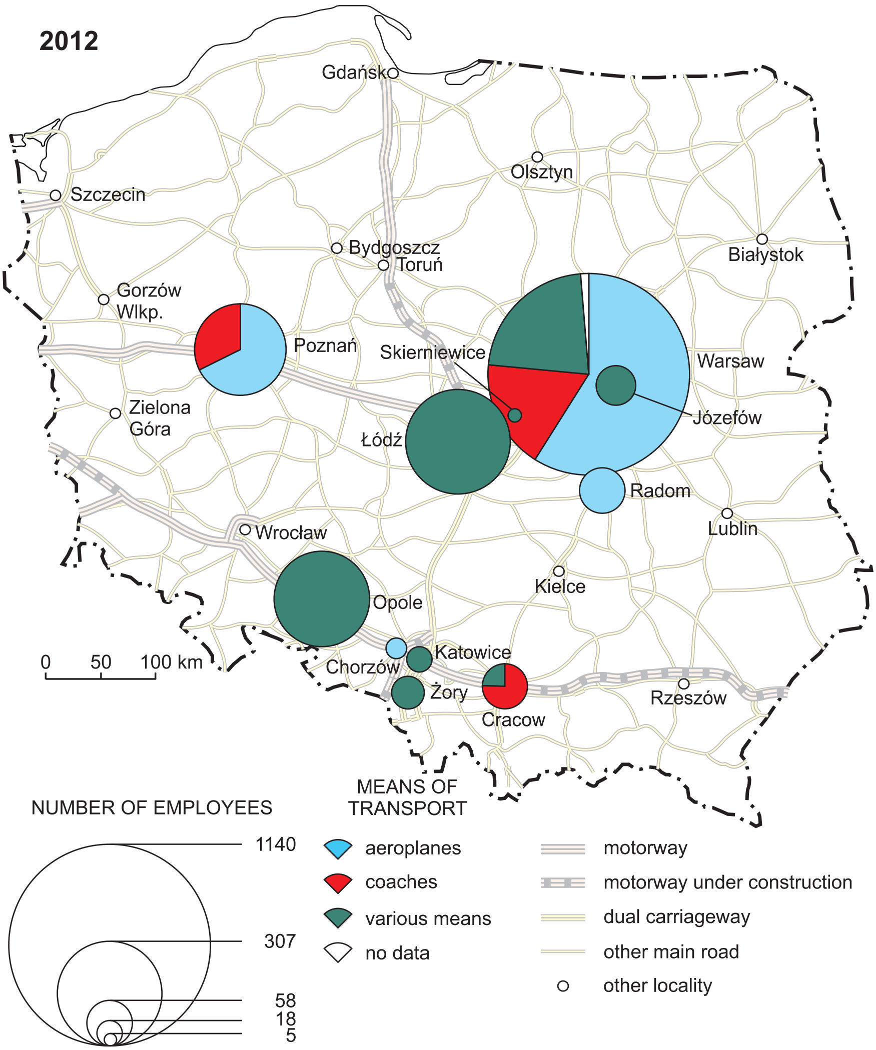


Fig. 24. Tour-operator structure by means of transport and numbers employed

Own elaboration based on: (1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*; (3) www.infoveriti.pl; (4) websites of tour-operators.

ment within firms of foreign capital's origin (German, Tunisian, Turkish) taking into account turnover and numbers of customers. What is of some interest, the latter regularity doesn't refer to tour operators with multi-national capital (Figure 20). The spatial distribution of tour operators after the countries of their capital's origin, measured by numbers of employed, is illustrated in Figure 25.

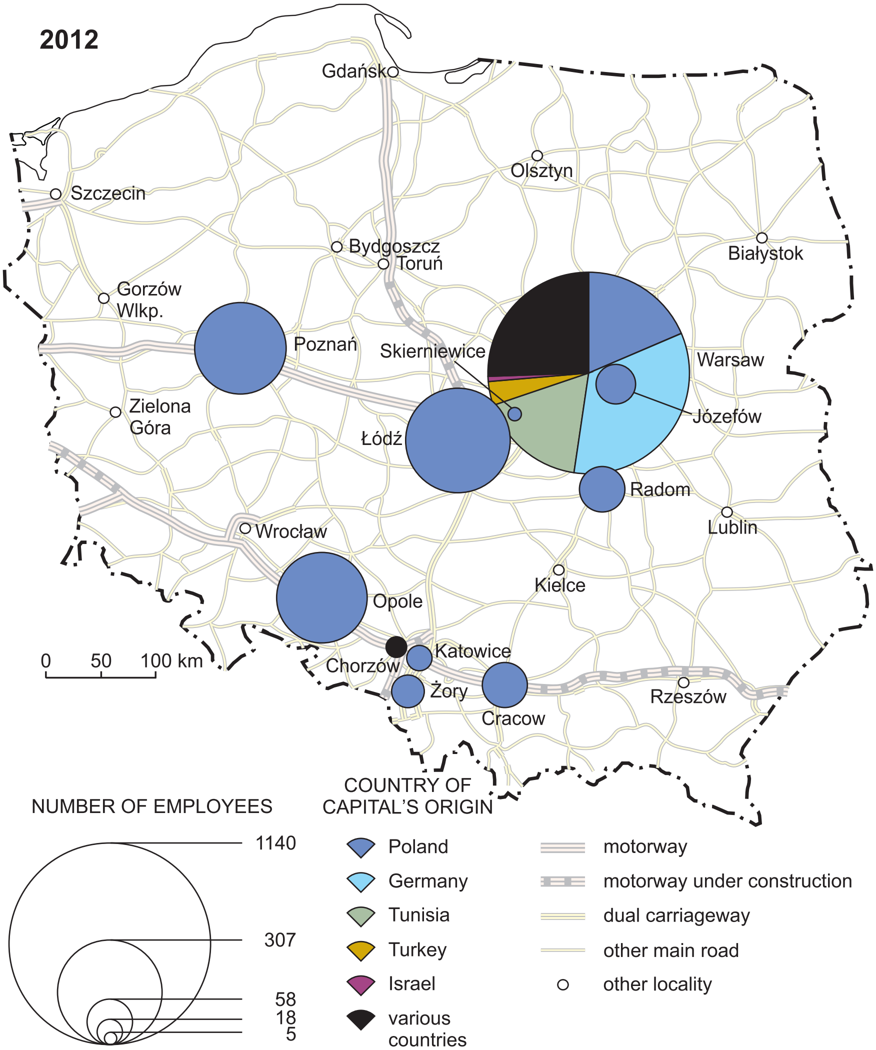


Fig. 25. Tour-operator structure by country of origin of capital and numbers employed
Own elaboration based on: (1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*; (3) www.infoveriti.pl; (4) websites of tour-operators.

4.6. Characteristics of selected tour operators: case studies

To characterise better certain travel agencies, selected case studies are included here. These present the nine largest (Boxes 1-9), as well as four medium-size tour operators (Boxes 10-13). The agencies selected illustrate the full spectrum of entities present on the Polish tourist market in 2012. The tour operators referred to differ in terms of origin, size, location, country of origin of capital, specialisation, means of transport used, and many others circumstances.

BOX 1 – ITAKA

Established in 1989, the private Opole-seated tourist agency called Nowa Itaka (using the commercial brand of Itaka) is the largest Polish tour operator. Since 2003 it has been wholly under the ownership of Polish (though it was previously Swedish). The firm specialises in foreign outward tourism, and its main destinations are Turkey, the Canary Islands and Greece. The most important segments of the market towards which Itaka's offer is directed can be described as family, seniors, premium, singles and conference tourism. The number of customers served in 2012 was of the order of 475,000 tourists.

The company uses various means of transport. For access to collecting points (by so-called 'feeder' lines) scheduled coaches are used. Customers starting their trips in the cities of Lublin, Radom and Kielce are transported to Cracow by microbuses and coaches of the BP Tour firm. Tourists whose departure points are the towns and cities of Suwałki, Augustów, Ełk, Łomża, Grajewo, Szczuczyn and Stawiska are carried to Warsaw by microbuses, or else the coaches of the Żak Express firm. Clients from Białystok are transported to Warsaw Chopin Airport by microbuses and coaches of the Podlasie-Express company. In similar vein, once a holiday has come to an end, customers are transported to the locality specified in the agreement. At the collection points, tourists change vehicles in order to participate in carriage during the course of the tourist event organised by the tour operator. They provide transport from many cities, such as Bydgoszcz, Cracow, Częstochowa, Gdańsk, Gliwice, Głubczyce, Gorzów Wielkopolski, Katowice, Koszalin, Legnica, Łódź, Opole, Piotrków Trybunalski, Poznań, Radom, Rzeszów, Słupsk, Szczecin, Tarnów, Warsaw and Wrocław. Moreover, one can also join a trip at the border crossings such as Budzisko, Jędrzychowice, Kołbaskowo, Korczowa and Kudowa-Słone (Figure 26).

Coach carriage for tourist instances organised by Itaka are offered by the firm's own coaches or ones leased from companies such as Hubertus of Wągrowiec and Tramp of Czechowice-Dziedzice.

A separate issue related to flights – Itaka cooperates mainly with large scheduled carriers such as Aeroflot-Russian Airlines, Air France, Alitalia, Czech Airlines, Emirates, KLM, Qatar Airways, LOT Polish Airlines, and TAP Portugal. Moreover, the services of Wizz Air low-cost and such Polish (or operating in Poland) charter airlines as Bingo Airways, Enter Air and Travel Service take part in the servicing. A majority of departures are from Warsaw and are not combined with additional costs to customers. However, in the case of departures from Cracow, Katowice, Gdańsk, Poznań, Wrocław and Lublin (departures from the last were to cease soon), certain surchages apply.

While abroad, the tour operator allows (mainly participants of leisure holidays) to have individual participation in excursions provided by local agencies. In this case, local coach or microbus carriers are employed, probably on an *ad hoc* basis, without a fixed cooperative agreement. Some excursions are organised with the use of coaches carrying tourists from/to Poland. Moreover, some local means of transport are used, such as vessels (on urban segments of rivers, but also during cruising on the Nile), cruise liners and sea ferries, plus underground railways, trams and urban buses. Regular scheduled trains running in many countries are also used (e.g. the TGV, Trans-Siberian Railway and Shinkansen).

Sources:
(1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*;
(3) www.itaka.pl (22.11.2013).

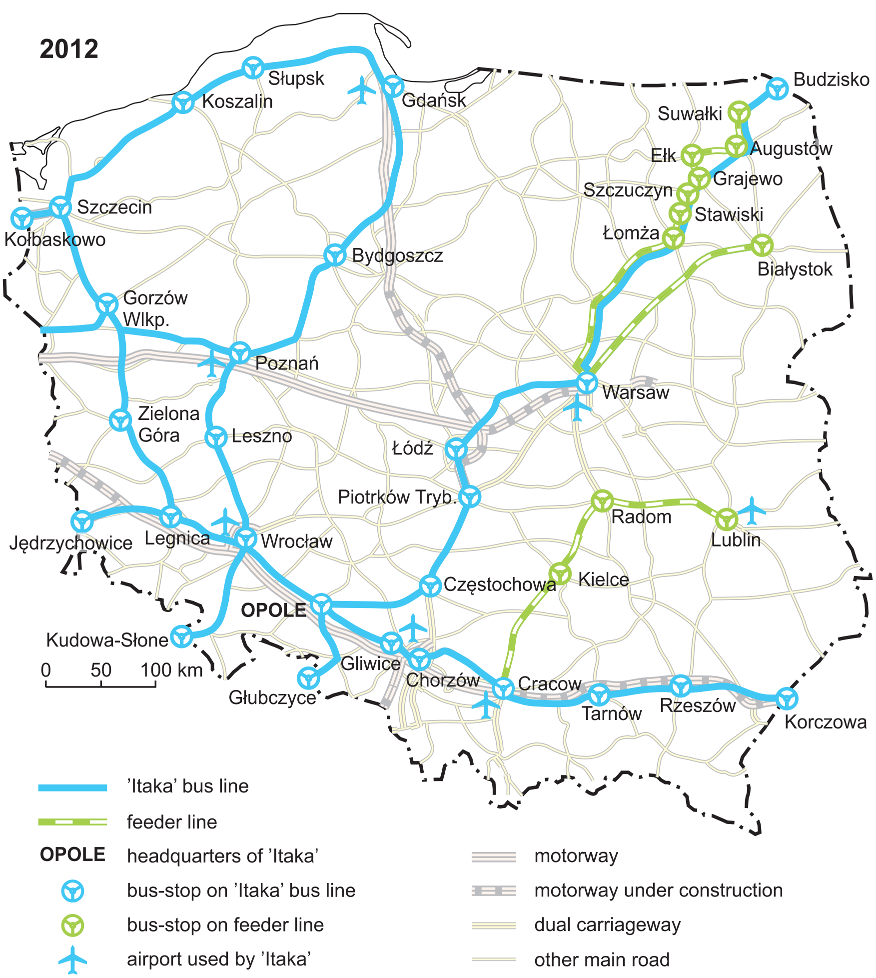


Fig. 26. The network of coach connections and airports servicing Itaka tours

BOX 2 – TUI POLAND

The TUI Poland tour operator has been under the ownership of a German firm, Leibniz Service GmbH (an affiliate of TUI Travel plc) – and present on the Polish market – since 1997. The main type of offer is foreign outward tourism directed towards such destinations as Turkey, the Canary Islands and Greece. The basic segments of the market are: premium, youth, group and family tourism. In 2012 the number of customers of tourist events serviced by the tour operator was 220,600. The basic means of transport are aeroplanes – mainly of charter airlines such as Nouvelair, Enter Air, Onur Air, Travel Service, Sky Airlines, Sun Express and Small Planet Airlines, as well as scheduled lines such as Aegean Airlines, TAP Portugal, Turkish Airlines and China Airlines. Aeroplanes servicing excursions organised by TUI Poland take-off from ten Polish airports – Warsaw, Poznań, Cracow, Katowice, Bydgoszcz, Wrocław, Rzeszów, Gdańsk and Szczecin. During foreign excursions use is also made *i.a.* of luxury coaches, ferries, cars and trains. Moreover, a catalogue of events (2012) offers excursions by the sailing ships 'Leonardo' and 'Otac Nicola' (Croatia), as well as cruising along the Nile, usually on the vessel 'Helio'. In some tourist events own access by customers is anticipated.

* * *

The Group of TUI AG (as main owner of TUI Poland) employs some 74,000 staff in the world, with activity divided into the three following segments.

- Organisation of tourist instances (the main activity) is focused in TUI Travel plc and its affiliates. TUI Travel is one of the largest European tour operators, listed on the London Stock Exchange. It was created in 2007 as a result of a merger between the TUI Group and a British company First Choice Holidays. It operates in c.180 countries in the world under more than 240 different brands. More than 30 million customers in 31 source markets are served. Sales are run by c. 1800 own sale posts, mainly in EU countries. c. 54,000 people are employed and six airlines with a total of 141 aeroplanes owned.

  Being in the ownership of the Group, charter airlines Thomson Airways (registered as Britannia Airways) are the largest carrier of the type in the UK, existing since 1962. ArkeFly (now Arke) provides charter and scheduled connections; its origin is linked with the Air Holland carrier established in 1981. The scheduled TUI Airlines Belgium exists under brand name Jetairfly.com, while present charter carrier TUI Fly Nordic is a former part of Transwede Airways. TUIfly serves low-costs and charters to classic holiday regions and is the outcome of a merger between Hapag-Lloyd Express and Hapagfly in 2007. Being on the market since 1981, the French regular airline Corsair International specialises in long-hauls (nearly 1.3 million passengers annually). A different situation applies to Air Berlin – one of the most important carriers in Germany, cooperating closely with TUI. Now the share taken by TUI in Air Berlin is just over 3% (a decrease from c. 20% in 2009), the main shareholder being the national airlines of United Arab Emirates – Etihad Airways.
- TUI Hotels & Resorts is the largest European company within the branch of holiday hotels. It embraces 248 hotels with a total of 157,000 beds in 24 countries. Well-known chain hotels such as Robinson, Riu, Grecotel, Grupotel, Iberotel and Dorfhotel belong to the company.

- The third basic segment of TUI's activity is in the hands of the Hapag-Lloyd Cruises company – the largest such operator in German-speaking countries. Its fleet consists of five cruise liners with hotel standard of 4* and 5*.

Moreover, TUI is in the ownership of container operator Hapag-Lloyd.

Sources:
(1) www.arkefly.nl; (2) www.corsair.fr; (3) www.ir.airberlin.com;
(4) www.jetairfly.com; (5) www.thomsonfly.com; (6) www.tui.pl (19.01.2012);
(7) www.tuifly.com; (8) www.tuiflynordic.se; (9) www.tuitravelplc.com (all but www.tui.pl accessed at 10.12.2013).

BOX 3 – RAINBOW TOURS

Łódź-seated Rainbow Tours has been active on the Polish market of tour operators since 1990, and since 2007 has been present on the Warsaw Stock Exchange. It is a specialist in the organisation of foreign outward tourism, mainly to Spain, Greece and Croatia, for such segments of the market as family, premium and group tourism. The services of Rainbow Tours (and affiliates, including Bee & Free) are for about 190,000 customers (2012), making this tour operator the third largest in Poland. Since 2006 it has owned an affiliate called Rainbow Tours Ukraina.

The transport of tourists is by scheduled and charter carriers, such as Brussels Airlines, Turkish Airlines, Air France, British Airways, AMC, Air Cairo, Corendon Airlines, Lufthansa, Air Italy Polska, Enter Air, KLM, Wizz Air and LOT Polish Airlines. Departures of groups are from nine Polish airports – Warsaw, Bydgoszcz, Łódź, Gdańsk, Rzeszów, Poznań, Katowice, Wrocław and Kraków.

Besides with its own fleet, coach carriage for Rainbow Tours is provided by Transbis of Myszków and Bomatur of Czechowice-Dziedzice. Coach routes resemble those of the other large Polish tour operator Itaka in being organised in detail, with carriages according to schedule. They are divided in line with the main regions of Europe. In each direction there are several routes along which participants change to vehicles to continue travelling to their destinations. Main routes are often supplemented by feeder lines (Figure 27). It should be recalled that trips to a place where change is made can be made, not only by coaches, but also by microbuses and cars. At the destination, a tour operator allows (mainly participants of holidays) the possibility to take part on their own in excursions organised by local agencies. During excursions local coach and microbus carriers are used, though there is no information on direct cooperation and the principles of such co-work. Some excursions are organised wholly using a coach carrying tourists from Poland. Local means of collective transport are also used, however, and during coach trips sea ferries of companies like Unity Line, Silja Europa and DFDS may also be used, along with cruises (*i.a.* from Louis, Orient Queen and Angelhotel).

Sources:
(1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*;
(3) www.rainbowtours.pl (19.01.2012, 13.12.2013).

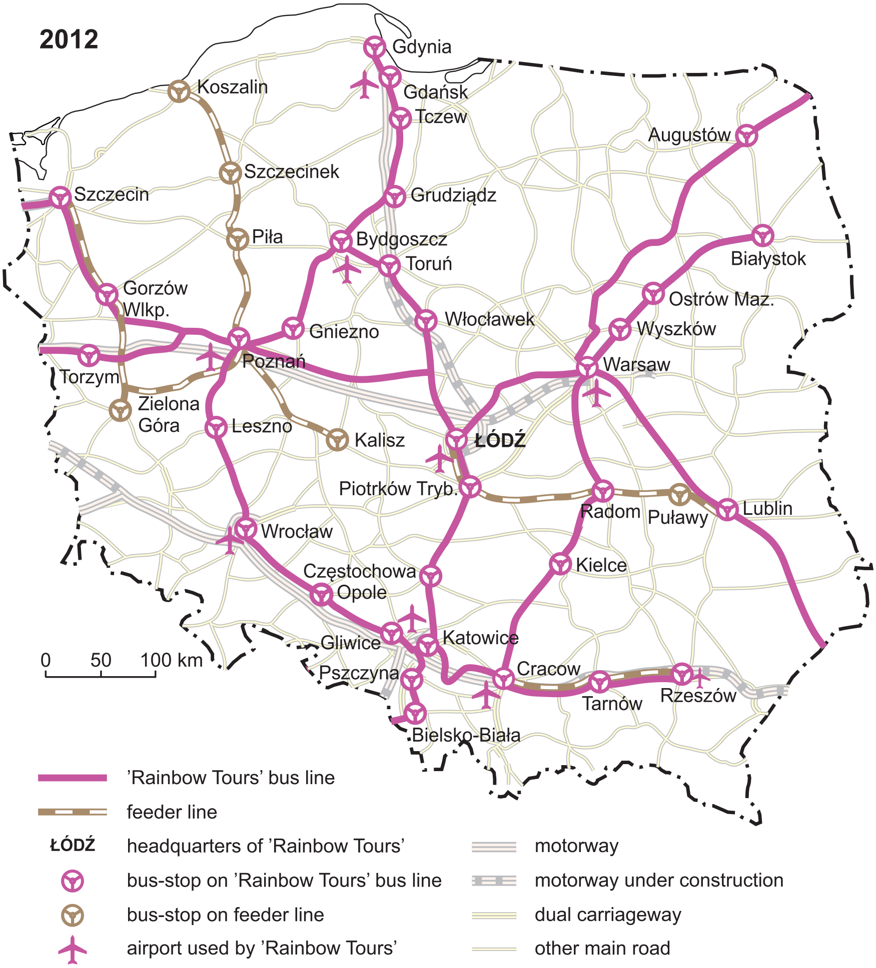


Fig. 27. The network of coach connections and airports servicing Rainbow Tours

BOX 4 – WEZYR HOLIDAYS

Wezyr Holiday Service (trade brand name Wezyr Holidays) is under the ownership of OTI Holding SA, representing a mix of Turkish, Russian, Belarussian and Ukrainian capital. The tour operator has been present on the Polish market since 1999, and has its seat in Warsaw. It offers customers foreign outward tourism to Greece, Egypt and Turkey, above all. The offer comprises family, premium and group tourism. As of 2012, there were 137,000 customers.

The basic means of transport are aeroplanes of charter carriers such as Air Cairo, Bingo Airways, Enter Air, Nouvelair, Sky Airlines, Small Planet Airlines, SprintAir, and Travel Service. The tour operator also uses the fleets of scheduled airlines (Royal Air Maroc, Bulgaria Air, LOT Polish Airlines and Pegasus Airlines), low-costs (Air Arabia) and a hybrid[8] (Syphax Airlines). Departures are from Warsaw, Poznań, Gdańsk, Wrocław, Cracow, Bydgoszcz, Rzeszów and Łódź. Destination ports include Hurghada, Sharm el-Sheikh, Heraklion (Iraklion), Kos, Rhodes, Enfidha, Antalya, Bodrum, Dalaman, Burgas and Barcelona.

Local transfers and excursions for Wezyr Holidays are organised by agencies in a given destination area. In Turkey and Egypt these services are provided by another company of the group – Odeon Tours, with its own plus a leased fleet park of coaches and minibuses (see below). On the Greek market a similar role is played by local agency Deltanet Travel, a specialist in the servicing of groups delivered to this country by foreign tour operators. It also owns and rents a fleet of coaches and microbuses. On carriage in Morocco there is no information of this kind (though a partner is international M.T.S. Incoming). A similar situation applies in the case of the Open Travel Service cooperating with Wezyr Holidays on Tenerife, as well as Viajes Olympia – on the Costa Brava.

* * *

OTI Holding has been in the present structure since 2006. It operates on the following markets: Turkish (brands: A Class, Odeon Tours Inbound, Odeon Tours Domestic Market, Holiday Market Services, Otium Hotels International, Odeon Security and Consulting), Russian (brands: Coral Travel, Sunmar, A Class), Polish (Wezyr Holidays, Coral Travel), Belarussian (Coral Travel), Ukrainian (Coral Travel), Thai (Odeon Tours Inbound), Egyptian (Odeon Tours Inbound) and United Arab Emirates (Odeon Tours Inbound). The total number of tourists served in 2012 by companies of OTI Holding exceeded 1.8 million.

The Holding's company Odeon Tours has its own fleet of coaches and minibuses (c. 100), as well as those subject to longer-term leases (c. 300), *i.a.* designated for the servicing of customers for events organised by tour operators of the group. Moreover, since 2011 onwards there have been own Royal Flight airlines belonging to the holding and registered in Ireland.

Sources:
(1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*;
(3) www.tanie-loty.com.pl (4.02.2014); (4) www.wezyrholidays.pl (4.02.2014);
(5) www.otiholding.com (5.02.2014); (6) www.deltanet.travel (5.02.2014).

BOX 5 – NECKERMANN POLSKA

Neckermann Polska Biuro Podróży – established in 1996 – is an affiliate of the German tour operator TC Touristik GmbH. It offers foreign outward tourism and domestic tourism. The main destinations of Neckermann are Spain, Bulgaria, Greece and Austria. Basic segments of the market served by these tour operators are family, seniors, premium, youth, honey-mooners and group

[8] Hybrid line – an airline retaining important elements of a scheduled carrier (a necessity of keeping some expensive systems allowing for cooperation with other airlines), but simultaneously introducing new elements characteristic for low-costs (e.g. in medium-hauls there is no business class, meals are paid for, luggage is paid for extra, check-in at the airport is chargeable, etc.). An example of a hybrid line is Air Berlin. According to media news, such a business model is nowadays an objective of management of LOT Polish Airlines.

tourism. The number of customers of this tour operator as of 2012 was c. 123,000.

The carriage of tourists makes use of aircraft, including those belonging to the Thomas Cook Group – Thomas Cook Airlines. Moreover, scheduled air carriers are used, such as Lufthansa, Tunis Air, Air Europa, or Cyprus Airways. Charter flights on behalf of Neckermann Polska are provided *i.a.* by Royal Air Maroc, Nouvelair, Enter Air, AMC Airlines, Balkan Holidays, Air Malta, LOT Polish Airlines, Travel Service, and Small Planet Airlines. Departures are from ten major Polish airports – Warsaw, Katowice, Cracow, Poznań, Wrocław, Gdańsk, Szczecin, Bydgoszcz, Łódź and Rzeszów.

As with the Itaka tour operator, local excursions associated with holiday trips are a matter for local tourist agencies. In turn, in the case of accommodation during ski-trips, it is the customer's own responsibility to provide transport. Excursions and transfers from airports to places of accommodation are by coach or microbus. In the case of some outward offers, it is possible to rent-a-car from Avis and Europcar (Costa del Sol). In Portugal, in addition to the offered car trip, rent-a-car from the Jardim firm is advocated.

* * *

TC Touristik GmbH is under the ownership of the British concern the Thomas Cook Group. The Group arose out of a merger between Thomas Cook AG (which was bought in 2000 by C&N Touristic, a company created by the merger of Neckermann and Condor in 1998), Thomas Cook & Son and the MyTravel Group plc. The Group is the owner of many tour operators. Moreover, the Group has in its ownership the scheduled airlines Condor (Condor Berlin and Condor Flugdienst GmbH), as well as such charter companies as Thomas Cook Airlines, Thomas Cook Airlines Belgium and Thomas Cook Airlines Scandinavia.

The largest shareholder within the Group is the investment fund Invesco Ltd (16.75%). Nowadays, the Thomas Cook Group has five main branches: the UK, Central Europe, German Airlines, Western Europe and Northern Europe. The total number of aeroplanes is 97, there are 2926 sales posts and a total employed staff of 32,722, serving over 19.1 million each year around the world.

Sources:
(1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*;
(3) www.neckermann.pl (27.11.2013);
(4) www.thomascookgroup.com (04.12.2013).

BOX 6 – SUN & FUN HOLIDAYS

One of the leading tour operators on the Polish market is Sun & Fun Holidays, a company with Tunisian capital. Registered in 2004, the agency is seated in Warsaw and offers foreign outward tourism for various customers, with the main destinations being Egypt, Tunisia and Turkey. The offer proves attractive for c. 98,000 customers (2012), and their carriage is provided by airlines that are either scheduled (Emirates) or charter (Enter Air, Travel Service, Bingo Airways). Departures are from six Polish airports – Warsaw, Gdańsk, Cracow, Łódź, Poznań and Wrocław.

Sources:
(1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*;
(3) www.sunfun.com (16.12.2013).

BOX 7 – ALFA STAR

Alfa Star Biuro Podróży is a Radom-seated tour operator that is a wholly Polish partnership of Izabela and Sylwester Strzylak's. The main type of activity is foreign outward tourism, first and foremost to Egypt, Turkey and Spain. Basic segments of the market are family, premium, singles, and group. In 2012, some 136,400 customers took advantage of the opportunities for tourism provided by this agency.

In the carriage of tourists this tour operator first and foremost makes use of charter flights (Air Cairo, Small Planet Airlines, Nesma Airlines and Enter Air). These start from nine Polish airports: Katowice, Poznań, Wrocław, Cracow, Warsaw, Gdańsk, Rzeszów, Łódź and Szczecin. Important destination airports are *i.a.* Burgas, Varna, Hurghada, Sharm el-Sheikh, Marsa Alam, Taba, Heraklion (Iraklion), Corfu, Barcelona–Girona, Fuerteventura, Tenerife, Faro, Antalya, Bodrum, Dalaman, Enfidha and Kos. It is less frequent for scheduled flights to be taken.

Moreover, during excursions local minibuses and coaches are used, as well as cruise liners and ferries (*i.a.* in Turkey and Egypt).

Sources:
(1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*;
(3) www.tanie-loty.com.pl (4.02.2014); (4) www.alfastar.pl (6.02.2014).

BOX 8 – EXIM TOURS

Exim SA (brand name Exim Tours) is a company established in 1996, with mixed Czech and German origin of capital, though registered in Warsaw. Up to 2011 this was in the exclusive ownership of a Tunisian called Nasr Ferid, inhabiting the Czech Republic, and was operating under the name Exim Tours. The principal offer is of foreign outward tourism to Egypt, Tunisia and Turkey. Basic segments of the market are family, group and seniors tourism. In 2012, some 84,700 customers took part in tourist events organised by tour operators.

The carriage of customers makes use of planes of scheduled airlines (Air France, KLM and LOT Polish Airlines), as well as charters (Air Cairo, Air Memphis, Bingo Airways, Enter Air, Nouvelair, Small Planet Airlines and Travel Service). Charter flights start from the ten most important Polish airports: Warsaw, Łódź, Bydgoszcz, Katowice, Cracow, Gdańsk, Poznań, Rzeszów, Szczecin and Wrocław. Destination ports are *i.a.* Burgas, Hurghada, Sharm el-Sheik, Marsa Alam, Taba, Kos, Heraklion (Iraklion), Rhodes, Barcelona, Palma de Mallorca, Agadir, Oujda, Enfidha, Djerba, Antalya and Bodrum. Exim Tours uses coaches, too.

* * *

Exim SA is a part of Exim Holding a.s., as registered in the Czech Republic. Exim Tours commenced with its activity in this country in 1993. The tour operator quickly developed its activity on the Polish, Slovak, Hungarian and Romanian markets. Thanks to a merger of brands Exim Tours and Kartago Tours, the Exim Group has become an international entity. On 31st May 2012, a German capital Group called REWE Touristik took over 51% of the shares in Exim holding.

Sources:
(1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*;
(3) www.tanie-loty.com.pl (4.02.2014); (4) www.eximtours.pl (7.02.2014).

BOX 9 – GRECOS HOLIDAY

Grecos Holiday, founded in 2006, is registered in the city of Poznań. It is in the sole ownership of three Polish citizens. The subject of this tour operator's activity is foreign outward tourism directed mainly towards Greece. Segments of the market served include individual tourism, or else that for couples and families. In 2012, the tour operator served about 57,000 people.

In transport, Grecos Holiday mainly uses the charter flights of such carriers as Enter Air, LOT Polish Airlines, Corendon Airlines, Travel Service and Aegean Airlines. Aeroplanes *i.a.* start up from Poznań, Wrocław, Cracow, Rzeszów, Łódź and Warsaw. Destination airports are located on Greek islands, *i.a.* Chania (Khania), Iraklion (Heraklion), Corfu, Kos, Rhodes and Zakynthos.

Sources:
(1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*;
(3) www.tanie-loty.com.pl (4.02.2014); (4) www.grecos.pl (7.02.2014).

BOX 10 – ECCO HOLIDAY

The Poznań-seated tour operator Ecco Holiday has been in operation since 2002, and in 2012 it took over Ecco Travel, which is now a separate brand, but not a company. There are four shareholders in the tour operator. The Agency specialises in foreign outward tourism, less so in inward tourism. Ecco Holiday customers are mainly directed to Bulgaria, Greece and Egypt. Basic segments of the market are youth, group and seniors tourism. The Agency serves above 26,500 customers annually (2012).

Main transport means in 2012 are scheduled and charter planes. Departures take place from 11 Polish airports plus Berlin-Tegel. Ecco Holiday cooperates with such airlines as Aegean Airlines, Alitalia, Bulgaria Air, Iberworld, LOT Polish Airlines, Norwegian Air Shuttle, Onur Air, Travel Service and Tunis Air, but in tours organised by former Ecco Travel planes of such carriers as Aeroflot-Russian Airlines, Air France, Austrian, Cathay Pacific, Condor Flugdienst, Emirates, KLM, LOT Polish Airlines, Lufthansa, Martinair, Quatar Airways, SriLankan, Swiss and Singapore Airlines are used.

Sources:
(1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*;
(3) www.eccoholiday.com (19.01.2012, 3.12.2013).

BOX 11 – MAZURKAS TRAVEL BIURO PODRÓŻY

The Warsaw-based tour operator called Mazurkas Travel Biuro Podróży is a wholly-Polish private company operating since 1990 – nowadays in the Mazurkas Group whose basic element combining firms are the persons of the two main shareholders – Andrzej Bartkowski and Jerzy Hulewicz. Mazurkas Travel specialises mainly in foreign inward tourism (c. 80,000 customers annually), and far less so in foreign outward tourism (c. 3,000 customers). The main segment where inwards is concerned entails organised tours – first and foremost from Spain, Portugal and the US. In servicing foreign groups, the Mazurkas Group's own fleet of coaches is used for regular tours through Warsaw, and other events, in line with the wishes of customers.

Nowadays, the structure of the Group is a sequence of transformation of former specialist agencies (involved in inward tourism, congresses, incentive tours and Warsaw tours) in separate entities. A role played by the former transport agency is played by Mazurkas Travel Transport, having 25 luxury coaches and minibuses of its own. An additional segment of the market is in the sale of air tickets. Moreover, the MCC Mazurkas Conference Centre & Hotel Group has its own conference and hotel centre in Ożarów Mazowiecki.

Sources:
(1) www.infoveriti.pl (5.10.2013); (2) www.mazurkas.com.pl (5.12.2013);
(3) www.transport.mazurkas.com.pl (5.12.2013);
(4) www.mazurkashotel.pl (5.12.2013).

BOX 12 – CENTRUM TURYSTYKI OSKAR

Established in 1999, the Poznań-seated Centrum Turystyki Oskar is wholly under Polish ownership and is active in foreign outward tourism only. Main directions of tours are Croatia, Greece and Bulgaria, and basic segments of the market are youth, student, family, seniors and group tourism. The agency serves about 25,000 customers annually (2012).

Carriage of tourists is performed with a fleet of nine coaches of the firm's own, with domestic access routes and feeder lines as shown in Figure 28.

Sources:
(1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*;
(3) www.oskar.com.pl (10.05.2012, 16.12.2013).

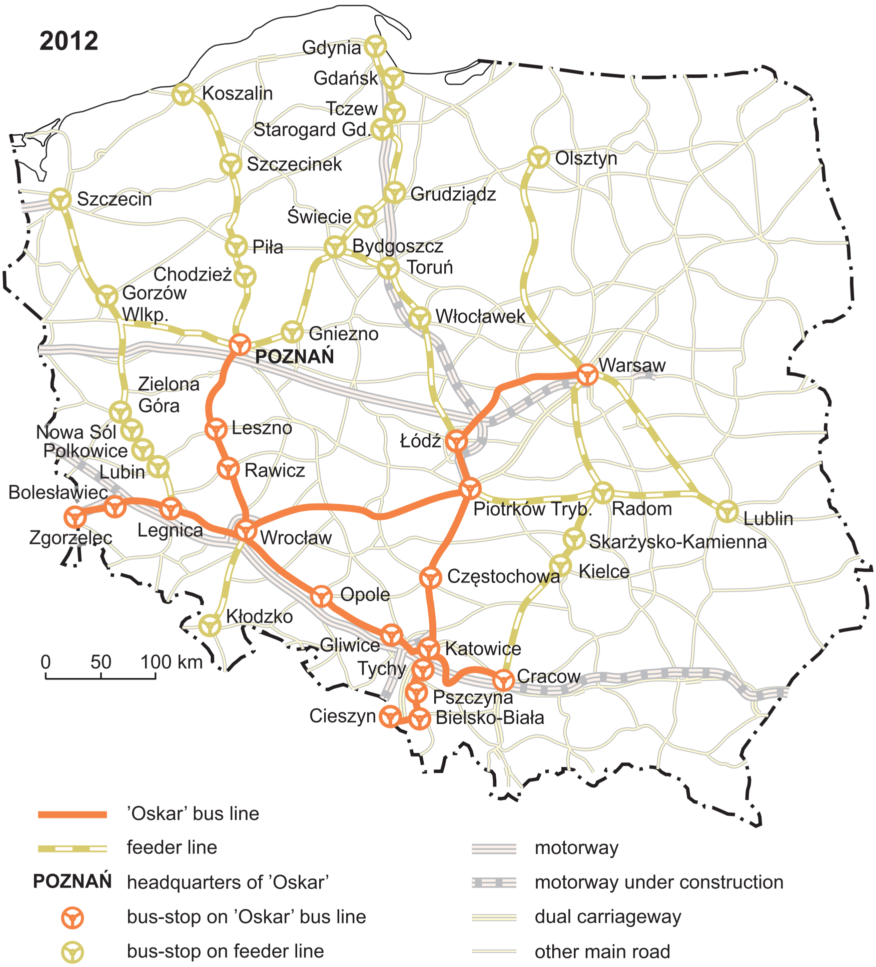


Fig. 28. The BP Oskar network of coach connections

BOX 13 – CB INTERNATIONAL

Present on the Polish market since 1994, the CB International tour operator in 91.67% owned by the Israeli company KN International Tourism Ltd. Its seat is in Warsaw. The offer of the agency is very specific, and this tends to distinguish the company from other entities. This tour operator focuses on organised inward tourism, and more precisely on the servicing of Israeli groups arriving for 'Marches of the Living' visiting former Nazi concentration camps in Auschwitz (about 8,500 people annually). The tour operator mainly makes use of air transport. However, there is no information on air and coach carriers.

Sources:
(1) *Touroperatorzy Raport 2012*; (2) *Touroperatorzy Raport 2013*;
(3) www.infoveriti.pl (16.12.2013).

5. AIR CARRIERS IN THE SERVICING OF POLISH TOUR OPERATORS

An important feature of the technological conditions underpinning the service activity in carriage is a high share of fixed costs in total costs, or otherwise a high ratio of constant to floating costs (Konieczna-Domańska, 2008, p. 47). This is true of all means of transport. As has already been mentioned, in an absolute majority of tourist events organised by our tour operators aircraft are used (cf. Chapter 4) as the primary, along with possibly one of more means of transport. In mass tourist traffic, organised by our largest tour operators, flights are performed mainly as charters. Full charter and semi-charter entail a circumstance whereby "an organiser receives for a disposal from a producer a certain number of services, pays for places actually used but no less then a share fixed in an agreement. A risk of not full usage of service potential is therefore split between producer and tour operator" (Konieczna-Domańska, 2008, p. 92). Our tour operators above all organise standard tours to popular localities on terms of special interest, or incentive tours (travel) – packages being a form of prize funded by an employer for its employees and business partners. However, the most common form observed are inclusive tours (IT) – flight packages organised with the use of a special discount fare available for this type of travel only. It can therefore be said, with a certain simplification, that charter flights almost exclusively serve organised mass foreign outward tourism, while – on the other hand – not all tourist flights are performed as charters; it is estimated that about 90% of all participants of tourist events use charter flights (leaving aside customers' own access, e.g. by car or plane).

A quite different situation applies to scheduled air traffic, including low-costs[9]. Scheduled flights relate to various goals and purposes of travel, like gainful employment, business trips, family visits and individual tourism, and only to some extent do they concern mass organised tourism traffic. To a greater extent, scheduled flights are used by smaller tour operators, directed to special segments of the market (such as Atas, Active Travel, Misja Travel, Espace Trans, Delta Travel, Top Travel Incentives or Pol Tour), which may be unable to fill an aircraft or even the greater part of one. In such situations it may even happen that

[9] Low-cost carriers are a reflection of the liberalisation of air transport. "Taking advantage of the new freedom of access to the market, various airlines structured themselves to the low-cost model, which consists of making maximum use of their aircraft and of the work force, reducing the costs related to comfort and making use where possible of various incentives offered by governments (...). Reducing costs allows them to offer low fares" (Dobruszkes, 2009, p. 423). Low wage costs, low incomes and weakness of the flag carriers are among the elements favouring the development of LLCs in CEE countries (Dobruszkes, 2006).

participants from a small group event buy air tickets on their own, individually. Scheduled carriers are also used by larger tour operators, but it is not easy to determine the level of intensity of this cooperation. Thus, despite quite good statistics on scheduled air traffic, data on this is only to a limited extent concerned with organised tourist traffic, while domestic traffic does not concern it at all. Therefore, in what follows in this Chapter, scheduled traffic will be described briefly, while foreign charter traffic will be presented extensively. It should nevertheless be recalled that charter flights can also be provided by scheduled (regular) carriers, including low-costs. By and large, a common feature of air carriers is their great variety in cooperation with tour operators.

5.1. Passengers and air-operations at Polish airports

In 2012, Polish airports served a total of 24.6 million passengers, including 3.6 million in domestic and slightly more than 21 million in international traffic (Table 4). The mobility coefficient informing about how many times an average inhabitant of a country uses air transport, is as low as 0.565 in the case of Poland, though is increasing slowly. The value proves that Poland is a country in which the air-transport market is in the process of developing (Tłoczyński, 2013).

The above mentioned numbers do not encompass certain departures organised by the Polish tour operators, but using Czech or German airports located near the southern and western borders, especially in flights towards the Mediterranean. Unfortunately, there are no statistics concerning this phenomenon.

Table 4. Passengers served at Polish airports, as classified in relation to either domestic or international flights (2012)

Airport	Domestic traffic	International traffic	Total
Bydgoszcz - Szwederowo	35,182	322,870	358,052
Cracow - Balice	433,273	3,005,485	3,438,758
Gdańsk - Wałęsa Airport	588,589	2,316,767	2,905,356
Katowice - Pyrzowice	99,879	2,450,969	2,550,848
Lublin - Świdnik	0	5,702	5,702
Łódź - Lublinek	11,854	451,402	463,256
Poznań - Ławica	168,363	1,426,858	1,595,221
Rzeszów - Jasionka	141,276	423,716	564,992
Warsaw - Chopin Airport	1,518,107	8,069,735	9,587,842
Warsaw - Modlin	590	857,473	858,063
Wrocław - Strachowice	401,549	1,563,952	1,965,501
Szczecin - Goleniów	155,751	194,030	349,781
Zielona Góra - Babimost	12,386	279	12,665
Total	3,566,799	21,089,238	24,656,037

Authors' own elaboration based on: (1) *Polskie Porty Lotnicze. Raport roczny 2012*; (2) www.airport.lublin.pl (18.02.2014); (3) information received directly from Łódź Airport (18.02.2014).

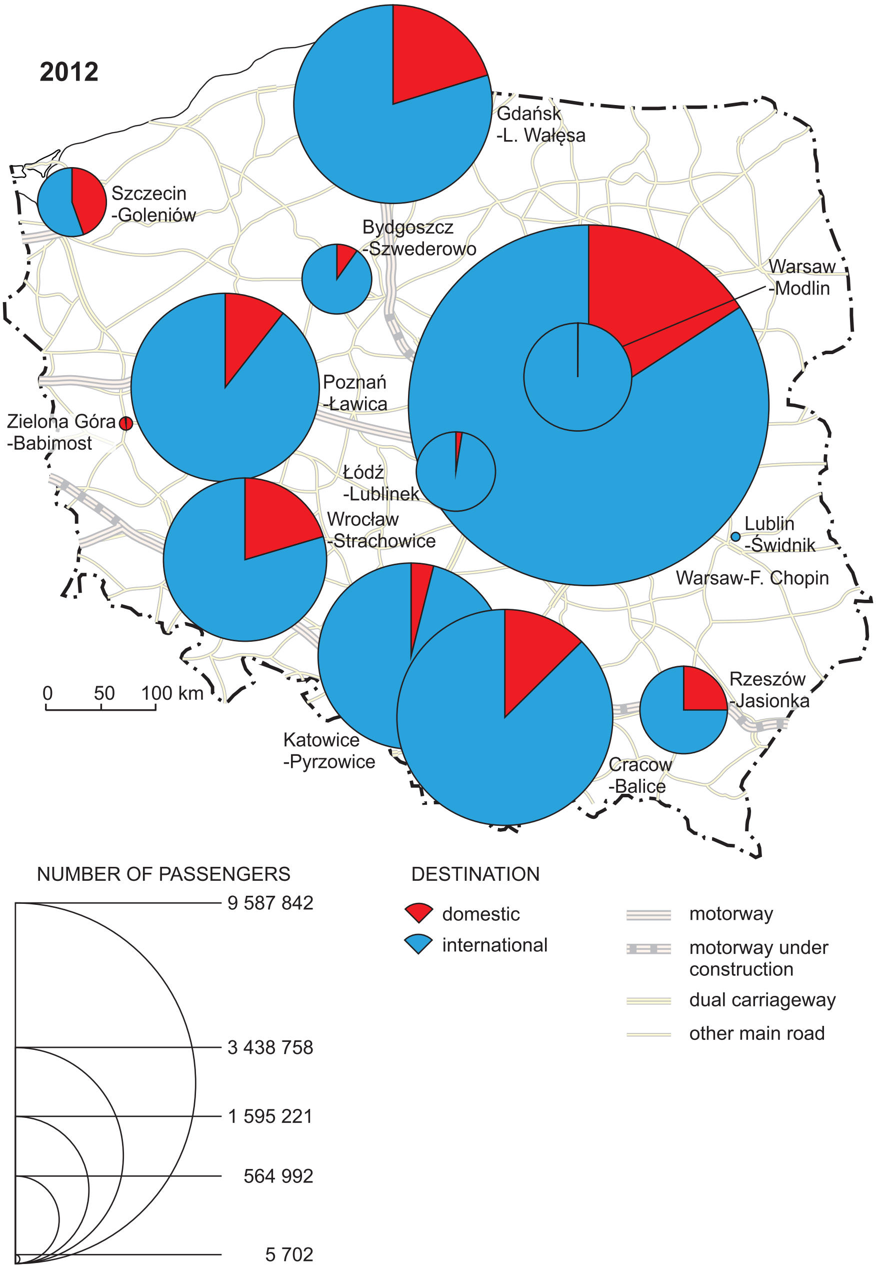


Fig. 29. Airports in Poland – traffic structure by numbers of passengers served and type of destination

Own elaboration based on: (1) *Polskie Porty Lotnicze. Raport roczny 2012*; (2) www.airport.lublin.pl (18.02.2014); (3) data of Łódź Airport.

The various airports take different shares in the servicing of air traffic (Figure 29). Warsaw Chopin Airport served almost 39% of all passengers, including 1.5 million in domestic and over 8 million in international traffic. And although the share taken by Warsaw Airport has been in decline for many years, it continues to dominate over regional airports. Cracow Balice Airport has a share of 13.9%, and the third in line Gdańsk Wałęsa Airport – one of 11.8%. Quite near to these sizes is the regional Katowice Airport (10%), serving first and foremost international air traffic. Airports in the cities of Wrocław and Poznań in turn occupy positions somewhere in the middle, since they also engage in international traffic servicing. In summary, six airports served more than a million passengers in 2012, while there were two others serving 500,000 travellers, including Warsaw-Modlin Airport, despite its having been open for several months only. The smallest shares in terms of numbers of passengers are taken by the airports in Lublin-Świdnik (newly-opened) and in Zielona Góra-Babimost, although this one presents the most impressive annual dynamics for growth (at 77%).

Another good measure of the significance of individual airports concerns the number of passenger operations (take-offs and landings of passenger aircraft)[10]. The picture with this statistic is very similar to the previous one, though airports accounting for a greater share of domestic traffic note relatively more air operations than passengers served (Table 5, Figure 30). This is a result of fact that domestic traffic is usually served by smaller planes. Hence, a share of certain airports in air operations can be slightly bigger than that relating to passengers served (this is particularly visible at such airports as Rzeszów, Szczecin, Wrocław, Warsaw-Modlin and Zielona Góra-Babimost).

Table 5. Passenger air operations at Polish airports, as separated into domestic and international flights (2012)

Airport	**Domestic traffic**	**International traffic**	**Total**
Bydgoszcz - Szwederowo	3,056	2,658	5,714
Cracow - Balice	10,792	28,563	39,355
Gdańsk - Wałęsa Airport	13,640	23,882	37,522
Katowice - Pyrzowice	8,003	22,581	30,584
Lublin - Świdnik	0	50	50
Łódź - Lublinek	512	3,266	3,778
Poznań - Ławica	8,887	16,374	25,261
Rzeszów - Jasionka	8,483	3,868	12,351
Warsaw - Chopin Airport	26,938	91,382	118,320
Warsaw - Modlin	16,587	6,357	22,944
Wrocław - Strachowice	10,389	17,132	27,521
Szczecin - Goleniów	5,676	2,454	8,130
Zielona Góra - Babimost	925	263	1,188
Total	113,888	218,830	332,718

Authors' own elaboration based on: (1) *Polskie Porty Lotnicze. Raport roczny 2012*; (2) www.airport.lublin.pl (18.02.2014); (3) information received directly from Łódź Airport (18.02.2014).

[10] The average number of passengers on a single air operation in Poland is 88 (2012).

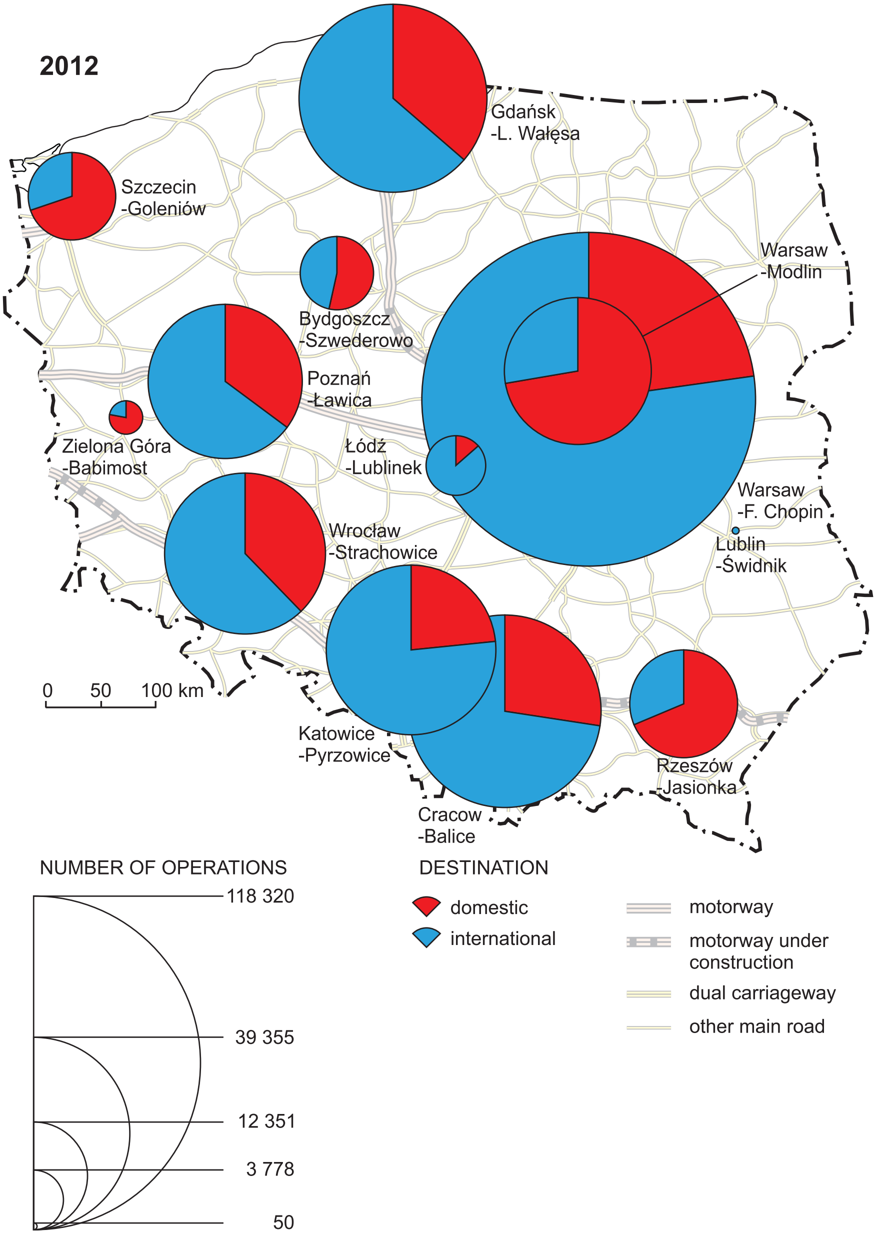


Fig. 30. Airports in Poland – traffic structure by number of airline operations and type of destination

Own elaboration based on: (1) *Polskie Porty Lotnicze. Raport roczny 2012*; (2) www.airport.lublin.pl (18.02.2014); (3) data of Łódź Airport.

Polish airports can also be described in terms of the segment of traffic serviced: scheduled, including low-cost carriers (LCCs), charters and other. The latter concerns transit, general aviation[11] and re-directions. Of most relevance from the point of view of this book is charter traffic, which will be taken into account in relation to numbers of passengers served (in total 3.3 million), and later on by numbers of air operations (total 25,154) performed at individual airports.

Most passengers in charter traffic are served at Warsaw Chopin Airport (c. 1.4 million, 41.7%), therefore its domination is more visible than in the case of total passenger numbers (Table 6, Figure 31), although this airport specialises in scheduled flights first and foremost. Second place is taken by the regional Katowice Airport, which specialises in the servicing of charter flights (0.8 million passengers) and low-costs (1.5 million). Quite substantial numbers of passengers are served at other regional airports, located close to such large urban centres as Poznań (0.4 million), Wrocław (0.25), Gdańsk (0.2) and Cracow (0.17). Other regional airports, including Łódź, serve at most several dozens of thousand of charter travellers, and Lublin, Warsaw-Modlin and Zielona Góra practically do not serve them at all.

Table 6. Numbers of passengers served at Polish airports, as related to the categories of scheduled, charter and other flights (2012)

Airport	**Scheduled traffic**		**Charter traffic**	**Other traffic**[a]	**Total**
	excluding LCC	**LCC**			
Bydgoszcz - Szwederowo	26,422	277,709	32,186	21,735	358,052
Cracow - Balice	1,153,663	2,100,642	169,201	15,252	3,438,758
Gdańsk - Wałęsa Airport	1,122,546	1,548,489	193,116	41,205	2,905,356
Katowice - Pyrzowice	178,374	1,491,363	776,163	104,948	2,550,848
Lublin - Świdnik	0	5,702	0	-	5,702
Łódź - Lublinek	13,325	396,777	45,735	7,419	463,256
Poznań - Ławica	394,637	799,605	393,671	7,308	1,595,221
Rzeszów - Jasionka	167,614	360,518	35,006	1,854	564,992
Warsaw - Chopin Airport	7,368,497	844,497	1,374,848	0	9,587,842
Warsaw - Modlin	0	857,473	363	227	858,063
Wrocław - Strachowice	272,823	1,063,175	252,528	376,975	1,965,501
Szczecin - Goleniów	154,109	169,279	22,289	4,104	349,781
Zielona Góra - Babimost	11,908	0	382	375	12,665
Total	10,863,918	9,915,229	3,295,488	581,402	24,656,037

[a] including transit, general aviation and re-directions.

Authors' own elaboration based on: (1) *Polskie Porty Lotnicze. Raport roczny 2012*; (2) www.airport.lublin.pl (18.02.2014); (3) information received directly from Łódź Airport (18.02.2014).

[11] "General aviation (GA) is all civil aviation operations other than scheduled air transport operations for remuneration or hire. General aviation flights range from gliders and powered parachutes to corporate jet flights. The majority of the world's air traffic falls into this category, and most of the world's airports serve general aviation exclusively" (http://en.wikipedia.org/wiki/General_aviation). The role of GA in Poland remains relatively limited. In 2012, there were 67,038 people transported, but the number of operations was 47,150 (*Polskie Porty Lotnicze. Raport roczny 2012*) – a statistic that confirms the small size of an average aircraft.

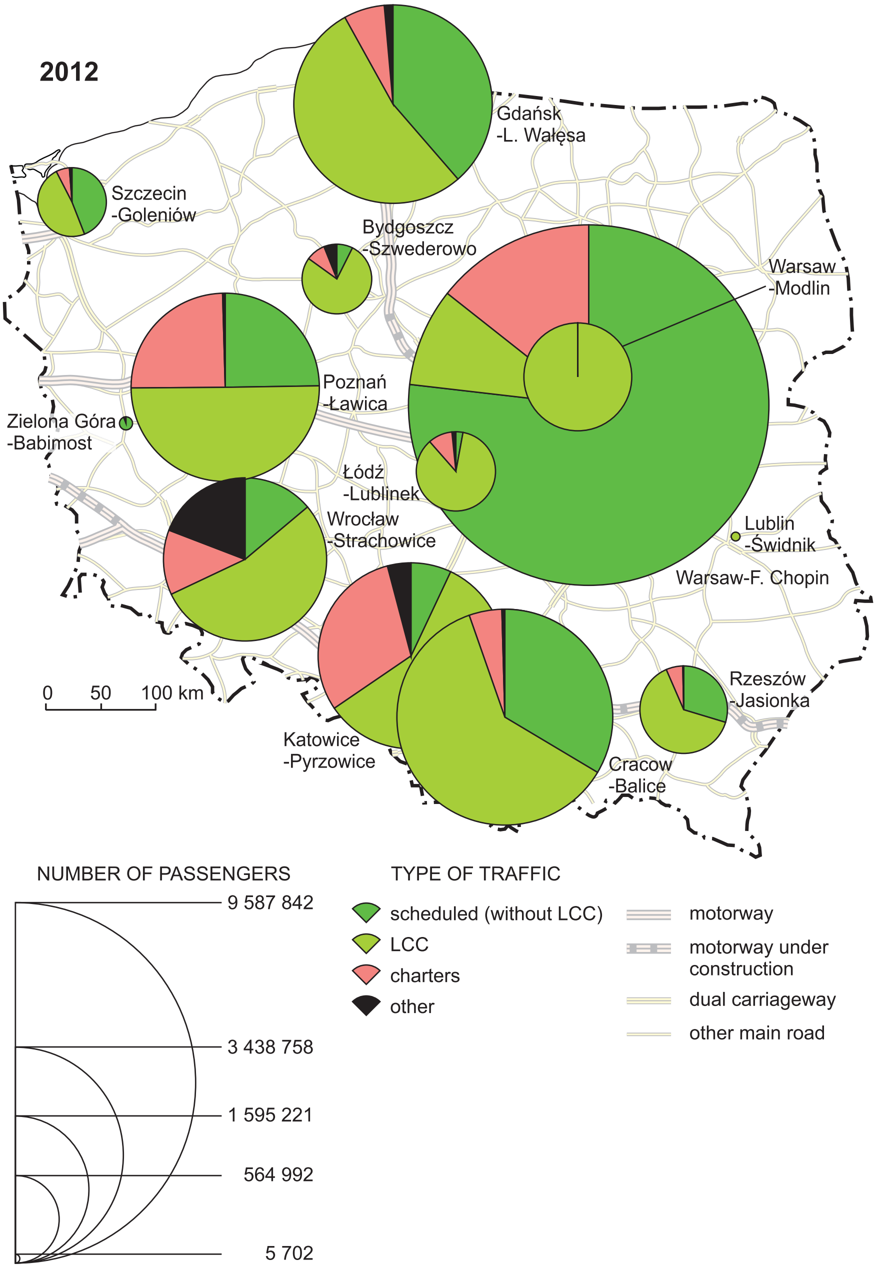


Fig. 31. Airports in Poland – structure by numbers of passengers served and type of traffic

Own elaboration based on: (1) *Polskie Porty Lotnicze. Raport roczny 2012*; (2) www.airport.lublin.pl (18.02.2014); (3) data of Łódź Airport.

Taking into account the number of charter operations for Polish airports, we receive a somewhat similar picture, although the share of individual airports in numbers of air operations is somewhat smaller than that of number of passengers (Table 7, Figure 32). It is most probable that charter traffic makes use of aircraft that are larger than would be typical or usual.

Table 7. Passenger operations at Polish airports, characterised as scheduled, charter or other flights (2012)

Airport	Scheduled traffic		Charter traffic	Other traffic[a]	Total
	Excluded LCC	LCC			
Bydgoszcz - Szwederowo	1,194	1,780	482	2,258	5,714
Cracow - Balice	19,533	14,069	1,432	4,321	39,355
Gdańsk - Wałęsa Airport	20,884	10,597	2,507	3,534	37,522
Katowice - Pyrzowice	4,044	10,016	5,883	10,641	30,584
Lublin - Świdnik	0	50	0	-	50
Łódź - Lublinek	600	2,685	434	59	3,778
Poznań - Ławica	10,322	5,613	3,201	6,125	25,261
Rzeszów - Jasionka	3,712	2,206	374	6,059	12,351
Warsaw - Chopin Airport	103,210	6,020	9,090	0	118,320
Warsaw - Modlin	0	6,380	2	16,562	22,944
Wrocław - Strachowice	6,026	7,134	1,522	12,839	27,521
Szczecin - Goleniów	3,682	1,164	219	3,065	8,130
Zielona Góra - Babimost	594	0	8	586	1,188
Total	173,801	67,714	25,154	66,049	332,718

[a] including general aviation and re-directions.

Authors' own elaboration based on: (1) *Polskie Porty Lotnicze. Raport roczny 2012*; (2) www.airport.lublin.pl (18.02.2014); (3) information received directly from Łódź Airport (18.02.2014).

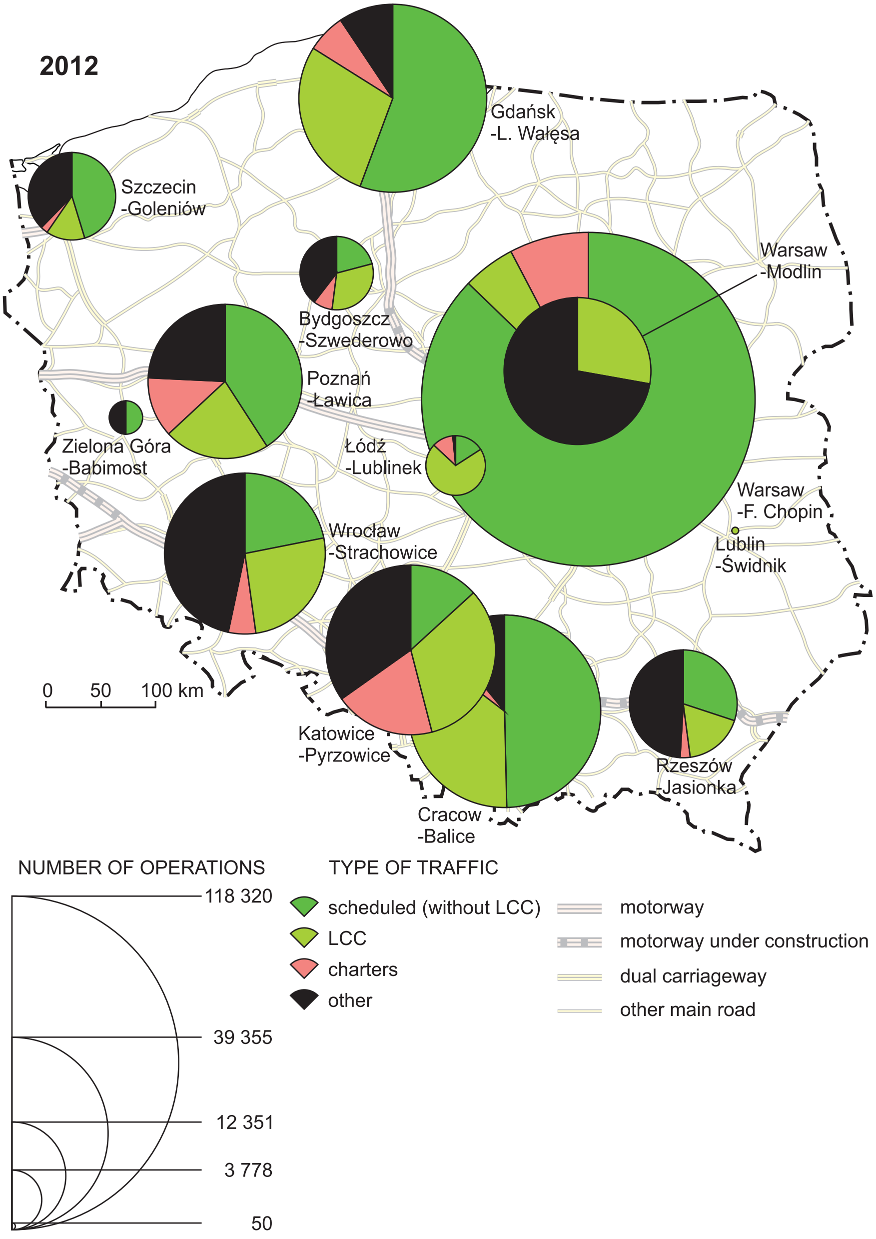


Fig. 32. Airports in Poland – structure by number of airline operations and type of traffic

Own elaboration based on: (1) *Polskie Porty Lotnicze. Raport roczny 2012*; (2) www.airport.lublin.pl (18.02.2014); (3) data of Łódź Airport.

5.2. Air scheduled carriers in service of Polish tour operators

According to information from the Civil Aviation Authority (ULC) an absolutely predominant share of the scheduled airlines on the Polish market is taken by just 25 carriers, which together serve some 98.68% of all passengers. Table 8 offers a concise characterisation of the largest carriers, and the tour operators cooperating with them. Not in each case could cooperating tour operators be found since, as has already been noted, scheduled carriage serves various purposes, and not first and foremost the servicing of organised tourist traffic.

Amongst the larger scheduled carriers there is LOT Polish Airlines with its affiliate EuroLOT which jointly serve 29.1% of passengers and cooperate with many of the largest tour operators (e.g. Itaka, Rainbow Tours, Neckermann Polska and Exim Tours), as well as smaller ones (e.g. Espace Trans and Top Travel Incentives). Considering the most important direction of flights (the UK, Ireland, Germany and Norway), the second scheduled carrier - the Irish low-cost Ryanair first and foremost caters for gainful employment trips, rather than those based around tourism. Another low-cost, the Hungarian Wizz Air, serves both segments of the market and cooperates with several tour operators (Itaka, Rainbow Tours, Otium Polska, Espace Trans and Pol Tur)[12]. Finally, the fourth most significant carrier on the Polish market – the regular carrier Lufthansa – in fact offers various kinds of carriage, including of tourists and in cooperation with certain Polish tour operators (Table 8).

Taking into account the number of passengers of scheduled airlines, the Polish carriers (mainly LOT Polish Airlines + EuroLOT, OLT Express Regional, EuroLOT and OLT Express Poland) have jointly served 34.56% of passengers. In turn, the share of low-cost carriers in scheduled traffic in Poland in 2012 was 47.40%. This is the result of such LCCs as Ryanair, Wizz Air, easyJet, Norwegian Air Shuttle, Air Berlin and several smaller lines, not mentioned in Table 9.

[12] An advantage of LCCs over charters is the possibility of flexible manipulation of the length of a person's stay, as well as more opportunities for the selection of times, including those without charter flights. Thus, some tour operators (e.g. Neckermann Polska, Ecco Holiday) have in their offer proposals anticipating customers' own arrivals, considering cooperation with the low-costs, and what is more, at attractive prices.

Table 8. The largest scheduled air carriers servicing Polish tour operators (as of 31 December 2012)

Carrier	**Seat (locality, country)**	**Type of activity (airlines)**	**Own-ership form**	**Year of estab-lish-ment**	**Number of passen-gers on the Polish market**	**Pas-senger fleet (total)**	**Tour operators in Poland served**	**Remarks**
LOT Polish Air-lines + EuroLOT	Warsaw, Poland	scheduled & charter	state	1929	6,175,015	37 + 24 (Euro-LOT)	Itaka, Rainbow Tours, Neck-ermann Polska, Exim Tours, Ecco Holiday + Ecco Travel, Furnel Travel International, Wezyr Holidays, Almatur Polska, Trade & Travel Com-pany, Grecos Holiday, Oasis Tours, Viva Club Polska, Active Travel, Espace Trans, Delta Travel, Top Travel In-centives	
Ryanair	Dublin, Ireland	low-cost	private	1985	4,887,084	305	no data	
Wizz Air	Budapest, Hungary	low-cost	private	2003	4,185,392	37	Itaka, Rainbow Tours, Otium Polska, Espace Trans, Pol Tour	
Lufthansa	Cologne, Germany	scheduled	private	1953	1,500,875	291	Neckermann Polska, Ecco Travel, Trade & Travel Com-pany, Rainbow Tours, Top Travel Incentives	
OLT Express Regional	Gdańsk, Poland	scheduled	private	2001	687,498	4	irrelevant (domestic flights)	former Jet Air
easyJet	London-Luton, UK	lost-cost	private	1995	429,071	190	*i.a.* Misja Travel	
Norwegian Air Shuttle	Fornebu, Norway	low-cost	private	1993	375,644	68	Ecco Holiday	

Carrier	Seat (locality, country)	Type of activity (airlines)	Ownership form	Year of establishment	Number of passengers on the Polish market	Passenger fleet (total)	Tour operators in Poland served	Remarks
Air France	Roissy, France	scheduled	private	1933	330,631	250	Itaka, Rainbow Tours, Exim Tours, Ecco Travel, Lekier, Trade & Travel Company	part of the Air France-KLM Group
SAS	Stockholm-Arlanda, Sweden	scheduled	state-private	1946	290,967	143	no data	ownership in Denmark, Sweden and Norway
EuroLOT	Warsaw, Poland	scheduled	state	1996	265,794	24	no data	
KLM Royal Dutch Airlines	Schiphol, The Netherlands	scheduled	private	1919	232,697	116	Itaka, Rainbow Tours, Ecco Travel, Trade & Travel Company	data for Group
Swiss International Air Lines	Basel, Switzerland	scheduled	private	2001	176,509	91	Ecco Travel, Active Travel, Top Travel Incentives	in Lufthansa ownership
British Airways	Harmondsworth, UK	scheduled	private	1909	167,662	273	Rainbow Tours, Almatur Polska, Trade & Travel Company, Atas	
OLT Express Poland	Warsaw, Poland	scheduled & charter	private	2011	164,202	11	Sun & Fun Holidays, TUI Poland, Alfa Star, Itaka, Wezyr Holidays, Rainbow Tours and others	activity terminated on 31 July 2012
Aeroflot-Russian Airlines	Moscow, Russia	scheduled	state-private	1923	160,649	128	Itaka, Ecco Travel	
Austrian Airlines	Vienna, Austria	scheduled	private	1957	153,007	74	Ecco Travel	in Lufthansa ownership
Aer Lingus	Dublin, Ireland	scheduled	state-private	1936	132,648	44	no data	
Finnair	Helsinki, Finland	scheduled	state-private	1923	126,064	69	Trade & Travel Company	

Air Berlin	Berlin, Germany	scheduled	private	1978	95,144	155	no data	
Alitalia	Roma, Italy	scheduled	private	1946	83,164	140	Itaka, Ecco Holiday, Active Travel	
Czech Airlines	Prague, Czech Republic	scheduled & charter	state	1923	73,201	25	Itaka	
Turkish Airlines	İstanbul, Turkey	scheduled	state	1933	65,058	195	Rainbow Tours, TUI Poland, Trade & Travel Company	
TAP Portugal	Lisbon, Portugal	scheduled	state	1945	64,000	55	Itaka, Almatur Polska	
Brussels Airlines	Brussels, Belgium	scheduled	private	2000	59,845	44	Rainbow Tours	in Lufthansa ownership
Aerosvit Airlines	Kiev, Ukraine	scheduled	private	1994	59,229	23	no data	

Authors' own elaboration, mainly on the basis of: (1) data of Poland's ULC (Civil Aviation Authority); (2) catalogues and websites of tour operators; (3) websites of carriers; (4) www.infoveriti.pl.

Table 9. Passengers served at Polish airports in scheduled traffic, divided by carriers (2012)

Carrier	Passengers	
	Number	Percentage
LOT Polish Airlines + EuroLOT	6,175,015	29.10
Ryanair	4,887,084	23.03
Wizz Air	4,185,392	19.72
Lufthansa	1,500,875	7.07
OLT Express Regional	687,498	3.24
easyJet	429,071	2.02
Norwegian Air Shuttle	375,644	1.77
Air France	330,631	1.56
SAS	290,967	1.37
EuroLOT	265,794	1.25
KLM Royal Dutch Airlines	232,697	1.10
Swiss International Air Lines	176,509	0.83
British Airways	167,662	0.79
OLT Express Poland	164,202	0.77
Aeroflot-Russian Airlines	160,649	0.76
Austrian Airlines	153,007	0.72
Aer Lingus	132,648	0.63
Finnair	126,064	0.59
Air Berlin	95,144	0.45
Alitalia	83,164	0.39
Czech Airlines	73,201	0.34
Turkish Airlines	65,058	0.31
TAP Portugal	64,000	0.30
Brussels Airlines	59,845	0.28
Aerosvit Airlines	59,229	0.28
Other carriers	280,380	1.32

Source: www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014), Urząd Lotnictwa Cywilnego (Civil Aviation Authority).

5.2.1. Air scheduled carriers by number of entities

Scheduled airlines serving the Polish market started up their activity in various periods, with the exception of the years 2006-2010. A majority, i.e. 16 out of 25 scheduled carriers (or 64%) commence with their activity before 1991, and the oldest even did so at the beginning of the interwar period (Table 8). In the periods 1991-1995 and 2001-2005 12% of scheduled carriers came into operation (Figure 33).

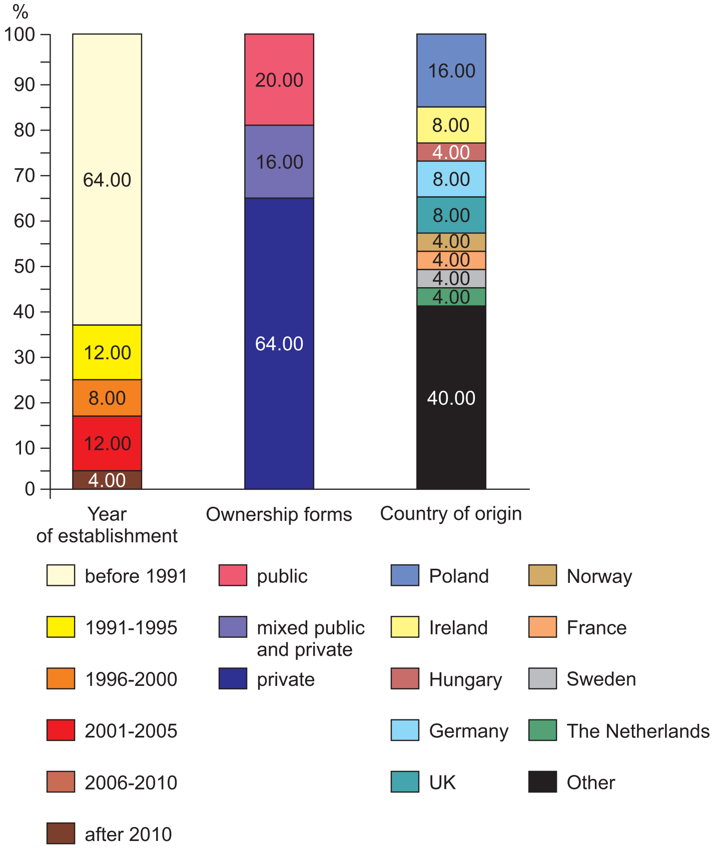


Fig. 33. Scheduled-airline structure by number of entities, as of 31 December 2012

As far as the forms of ownership of scheduled carriers are concerned, an absolute majority (64%) of them are in private ownership, while 20% are state-owned (LOT Polish Airlines + EuroLOT, Czech Airlines, TAP Portugal, Turkish Airlines). This leaves 16% of 'mixed' – private and state-owned carriers (Aer Lingus, Finnair, SAS, Aeroflot-Russian Airlines). All the low-costs are in private ownership. What is of some interest is that the largest share of the state sector on our market is taken by Polish carriers.

Polish scheduled carriers provide the biggest share in servicing the domestic market (16%). The Irish, German and British carriers enjoy 8% shares each, while the others have equal 4% shares.

5.2.2. Air scheduled carriers by numbers of passengers served on the Polish market

Of greater interest than the number of entities is the role these play on the Polish market, as measured by reference to numbers of passengers served. It can be observed that the oldest carriers serve most passengers, more then their respective number of entities (69.42%). There is also a greater share for those starting out in business in the years 2001-2005 (24.11%). It is difficult to conclude for sure, but it would seem that a certain cognition of the market has a positive influence on the level of carriage achieved (Figure 34).

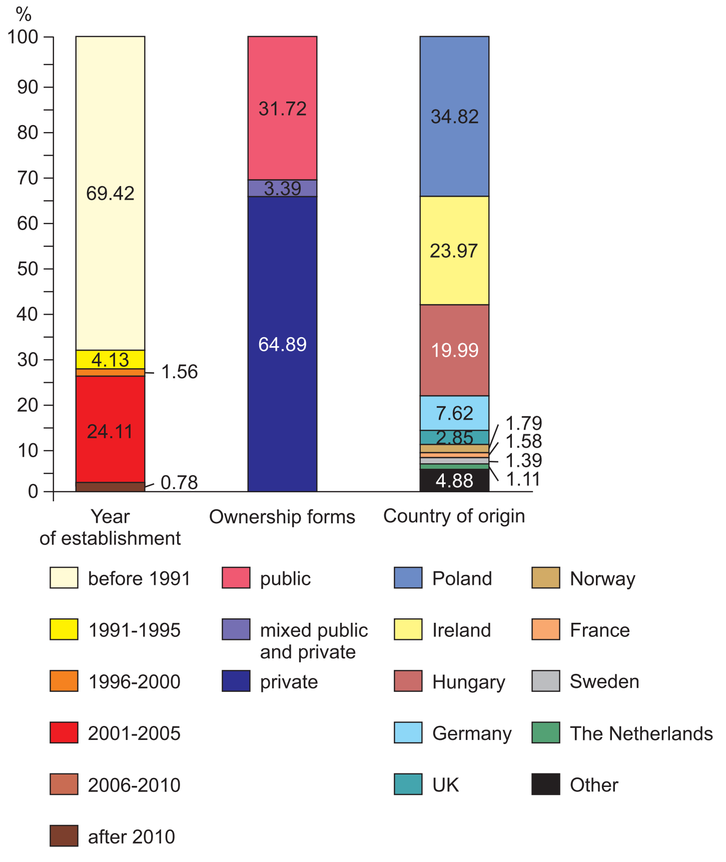


Fig. 34. Scheduled-airline structure by number of passengers on the Polish market, as of 31 December 2012

Own elaboration based on: www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014).

Ownership form can also play a role in influencing numbers of passengers served. Scheduled private carriers have a larger share in passenger transport than would be expected from the number of entities (64.89%). This can be associated with more effective management than in state or 'mixed' public and private capital companies. The latter ownership form seems of particularly limited importance in terms of the numbers of passengers served (just 3.39% of the total).

As far as the country of origin of capital is concerned, the greatest share is that taken by Polish carriers (34.82%), which is much more than might be expected on considering the number of firms involved. Of course, a knowledge of the home market and long presence on it facilitates the gaining of potential customers. But Irish and Hungarian carriers, in their majority low-costs (Ryanair and Wizz Air), have been able to gain large shares of passengers: at 23.97% and 19.99% respectively. Deutsche Lufthansa has gained 7.62% of the passengers on the Polish market, while shares taken by remaining carriers do not exceed 3%.

5.2.3. Air scheduled carriers by size of fleet

Size of fleet is no doubt a worse measure of carriage, since it has little to say about actual exploitation. There are good examples of even relatively small carriers in terms of fleet-size making very intensive use of aircraft and thus achieving great volumes of passengers carried. What is of greater importance is that it is very difficult to relate size of fleet to the Polish market served, since the same aircraft can serve flights between various cities and countries. For all these reasons, size of fleet says more about the potential of a carrier than about its real level of servicing of the Polish market.

Taking the above into account, scheduled carriers which commenced with activity before 1991 together have the largest fleet, overall accounting from some 2300 aircraft (or 82.38% of the total). Carriers which entered the market later on, have markedly smaller shares of the overall fleet.

The private sector owns the largest fleet, consisting of 2072 aircraft in total (74.22%), as compared with a 'mixed' public and private fleet of 384 (13.75%), and 336 state-owned craft (12.03%). When countries of carrier origin are taken into account, the largest share in servicing the Polish market is provided by European scheduled airlines: British (463 planes, 16.59% of the total), German (446, 15.98%), Irish (349, 12.5%) and French (250, 8.95%).

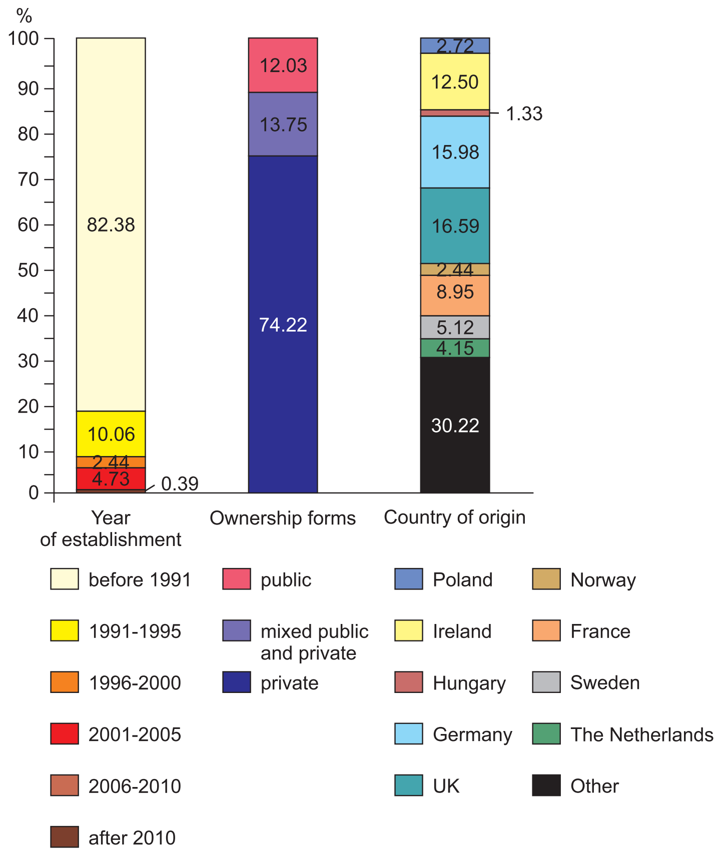


Fig. 35. Scheduled-airline structure by size of fleet, as of 31 December 2012

5.2.4. Characteristics of more important scheduled carriers: case studies

To look more closely at scheduled carriers involved in the servicing of the Polish market, we present several case studies describing selected airlines (Boxes 14-19). We will begin with the most important airlines on the Polish market.

BOX 14 – LOT POLISH AIRLINES & EUROLOT
The national state-owned carrier LOT Polish Airlines together with its affiliate EuroLOT constitute the Polish market's largest service providers of scheduled carriages, and one of the key forces on the charter market.

Precursors of LOT Polish Airlines were active from 1920 onwards. It was back then that a Poznań-seated air society 'Aerotarg' was organised (for several months) – as the first scheduled air connection between the cities of Poznań and Warsaw. In turn, in 1922, in the city of Gdańsk a company called Polska

Linja Lotnicza 'Aerolloyd' was established, while 1925 brought the founding of the 'Aero' air transport firm, again in the city of Poznań. At the end of 1928, all of the private firms were substituted by one state plus local-government-owned company called Linje Lotnicze LOT, which commenced with its scheduled carriage activity in 1929, joining IATA in 1930. The company developed gradually, albeit with a pause during WW2 when the majority of its fleet was lost. In the post-war period, 1974 saw the carrier separate off from its internal structure a section devoted to the organisation of charter flights. In 1988, LOT Polish Airlines became the first carrier in any of the CEECs to purchase American aircraft (Boeing 767s, in use since 1990). In December 1992, the state-run enterprise was transformed into a company belonging to the Treasury, while in 1997, an affiliate called EuroLOT was created to provide for the takeover of domestic connections. In November 1999, about 30% of the shares in LOT Polish Airlines were purchased by SAirLines, a company belonging to the SAirGroup. Simultaneosly, LOT Polish Airlines joined the world alliance of The Qualiflyer Group. In 2002, the decision to terminate this alliance was taken, and LOT joined Star Alliance. Following the bankrupcy of the Swiss buyer in 2001, certain efforts were made to regain the shares – a goal that was ultimately achieved as late as in 2009. In 2005, as a reaction to the development of the low-cost market, the carrier created an affiliate under the brand name Centralwings, dedicated to low-cost carriage. In 2009, from within the inner structure, LOT Charters became identifiably separate (though not with any new business entity being founded). The Centralwings line was also closed down at this point. Today, LOT Polish Airlines is mainly involved in scheduled international carriage, though gradually evolving in the direction of a hybrid line. 93% of the shares in LOT belong to the Treasury or the Silesia Financial Society, while the remainder are in the hands of employees. A strategic investor for LOT Polish Airlines is being looked for.

EuroLOT engages in low-cost carriage between the most important regional airports in Poland. It is also a feeder line for international connections of LOT Polish Airlines, thus creating a supplementary role for the transit hub at Warsaw Chopin Airport. EuroLOT also offers charter flights in Poland and abroad.

In 2012, where charter flights were concerned, LOT Polish Airlines jointly with EuroLOT served 101,638 passengers. This compared with as many as 6,175,015 people on scheduled flights. Moreover, EuroLOT on its own carried 265,794 people on scheduled flights. Overall, carriage is served by a fleet of 37 aeroplanes belonging to LOT (these being Embrarer 170s, Embrarer 175s, Embrarer 195s and Boeing 737s, 767s and 787s). In addition, there are 24 aircraft of EuroLOT (ATR42s and 72s and DHC-8s).

Charters are provided by LOT Polish Airlines and EuroLOT for such large tour operators as Itaka, Rainbow Tours, Neckermann Polska, Exim Tours, Ecco Holiday + Ecco Travel, Furnel Travel, Wezyr Holidays, Almatur Polska, Trade & Travel Company, Grecos Holiday, Oasis Tours, Viva Club Polska and Active Travel. Smaller tour operators also use charter flights from the two carriers (e.g. Espace Trans, Delta Travel and Top Travel Incentives).

The aeroplanes of the two carriers fly to many destinations, including Bulgaria (Varna), Egypt (Hurghada and Sharm el-Sheikh), Greece (Iraklion), Spain (Barcelona-Girona) and Turkey (Dalaman).

Sources:
(1) www.lot.pl (27.03.2014); (2) www.eurolot.com (27.03.2014);
(3) www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014);
(4) www.tanie-loty.com.pl (4.02.2014).

BOX 15 – WIZZ AIR

The private, low-cost carrier Wizz Air Hungary Légiközlekedési Kft has existed since 2003 and is seated in Budapest. It is very familiar in Poland, the first flight having left the city of Katowice many years ago. The carrier has 16 air-bases in Europe, the Polish ones being in Gdańsk, Katowice, Warsaw and Wrocław. Besides these Polish locations, the airline also operates out of Budapest, Sofia, Vilnius, Kiev, Prague and Romanian Bucharest, Cluj-Napoca, Tirgu Mures and Timisoara. Wizz Air Hungary owns a fleet of 37 Airbus A320 aircraft. Moreover, in Kiev there is a Wizz Air Ukraine company registered to serve that market of international and domestic flights. The latter owns an additional two Airbus 320s (as of 31 December 2012).

On the Polish market for scheduled flights, Wizz Air serves more than 4 million passengers a year (4,185,392 in 2012), and its services are provided for such large tour operators as Itaka, Rainbow Tours and Otium Polska, as well as smaller ones, e.g. Espace Trans and Pol Tour.

Sources:
(1) www.wizzair.com (31.03.2014);
(2) www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014).

BOX 16 – LUFTHANSA

Deutsche Lufthansa AG is one of the world's largest regular airlines. It has been private since 1997, with its seat in Cologne. It harks back to a tradition from the interwar period when – on the basis of the two companies Deutscher Aero Lloyd and Junkers Luftverkehr - Deutsche Luft Hansa AG was created in 1926. Nevertheless, today's airline did not in fact start up until 1953. In the period of the so-called 'Cold War' aircraft of this airline were not permitted to land in the city of Berlin.

In 1997, at the initiative of Lufthansa and certain other carriers like Air Canada, Scandinavian Airlines, Thai Airways and United Airlines, a Star Alliance was created. The alliance has developed substantially (today LOT Polish Airlines belong to the Alliance, too). The Group of Lufthansa has been established on a wave of privatisation of companies, and embraces almost 500 affiliates and associated companies within five market segments (passengers carriage, logistics, servicing and aircraft repair, catering and ICT services). Airlines nevertheless form the main market segment of the Group. Besides Lufthansa, other carriers belonging to it are: SWISS (since 2005), Austrian Airlines (2009), Brussels Airlines (2008), British Midland and SunExpress.

As of 31 December 2012, the fleet at the disposal of this carrier consists of 291 aircraft of various types. In the majority these are Airbus A320s (49), A321s (62) and A340s (48). Also in use are Airbuses A319, A330, A340 and A380 (63 altogether). The second supplier of aeroplanes for Lufthansa has been American Boeing, whose models Boeing 737s (40) and Boeing 747s (29) are used. In addition, Lufthansa has a fleet of 69 smaller aircraft (mainly Bombardier CRJs and Embrarers). The fleet of the entire Lufthansa Group consists of 627 aeroplanes.

In 2012, on the Polish scheduled market, 1,500,875 passengers were served by Lufthansa, including customers of such large tour operators as Neckermann Polska, Ecco Travel, Trade & Travel Company and Rainbow Tours, as well as smaller ones like Top Travel Incentives.

Sources:
(1) www.lufthansagroup.com (30.03.2014);
(2) www.investor-relations.lufthansagroup.com (30.03.2014);
(3) www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014).

BOX 17 – AIR FRANCE

The French flag carrier and scheduled airline Air France was established in 1933, from a merger of several carriers like Air Orient, Air Union, Compagnie Générale Aéropostale and Société Générale de Transport Aérien (SGTA). Like other air carriers, Air France was nationalised in 1945, while in 1976, it commenced with the pioneering use of supersonic Concorde aeroplanes (terminated in 2003). In 1987, jointly with Iberia, Lufthansa and SAS, the carrier founded the Amadeus company, which has been responsible for a unified system of sales of products. Of some interest is the fact that, during the period of the 'Cold War' Air France was one of the very few Western European airlines permitted to fly to the city of Berlin. In the early 1990s, Air France was enlarged to include the semi-state Air Inter and the wholly privately-owned Union de Transports Aériens. 1994 brought the official establishment of the Group of Air France. In 2004, in turn, a merger of Air France and KLM Royal Dutch Airlines took place – into the Group of Air France-KLM, which besides the two carriers also concentrated a majority of the shares in MartinAir Holland, Brit Air and City Jet. The group has also minority shares in Italian carrier Alitalia.

The fleet of Air France, as of the end of 2012, embraced 257 aircraft, including 250 passenger-carrying planes – 181 produced by Airbus (A318, A319, A320, A321, A330, A340 and A380) and 69 by Boeing (Boeing 747s and 777s).

On the Polish market, some 330,631 people were carried by Air France in 2012, including tourists of such tour operators as Itaka, Rainbow Tours, Exim Tours, Ecco Travel, Lekier and Trade & Travel Company.

Sources:
(1) www.airfranceklm-finance.com (1.04.2014);
(2) www.amadeus.com (30.03.2014);
(3) www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014).

BOX 18 – KLM

KLM (Koninklijke Luchtvaart Maatschappij) Royal Dutch Airlines is the Dutch national carrier, and a contemporary private, scheduled airline based at Schiphol, established in 1919.

In 1988, KLM took over a line called NetherLines European Commuter Service, while a year later it bought 20% of the shares in American carrier Northwest Airlines. In 1991, KLM used the previous takeover of NLM Cityhopper and NetherLines to create a line called KLM Cityhopper, while also increasing its stake in the charter carrier Transavia (from 40 to 80%). In 1996, KLM became the owner of 26% of the shares in Kenya Airways, while in 2004, the Air France-KLM Group was created. In 2008, KLM bought all the shares in Martinair, and in 2009 r. the Air France-KLM Group took a (25%) minority stake in Alitalia.

As of 31 March 2012, KLM was the sole owner of such airlines as Transavia Airlines, MartinAir Holland, KLM Cityhopper and KLM Cityhopper UK. Moreover, the Dutch carrier owns 27% of the shares in Kenya Airways and 40% of those in Transavia France.

At the end of 2012, the carrier had a fleet of 116 aircraft (while the whole KLM Group has 203 in total). These are mainly Boeing 737s, 747s and 777s, though the fleet also includes Airbus A330s and McDonnell Douglas MD-11s.

On the Polish market, some 232,697 passengers were served in 2012. Among the tour operators using KLM flights were Itaka, Rainbow Tours, Ecco Travel and the Trade & Travel Company.

Sources:
(1) *KLM Royal Dutch Airlines Annual Report 2012*; (2) www.klm.com (4.04.2014); (3) www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014).

BOX 19 – BRITISH AIRWAYS

Today's privately-owned scheduled carrier British Airways (BA) was established in 1974 as a result of a merger between the state-owned British Overseas Airways Corporation and British European Airways – companies rooted in the interwar period. In 1987, the state-owned enterprise was privatised, and it is interesting to recall that the demand for shares exceeded supply eleven-fold. In the same year, BA took over British Caledonian, a carrier that was in a poor economic condition. As a result of relevant changes, British Airtours changed their name to Caledonian Airways (this charter line being sold off in 1995). In 1992, the private line Dan-Air was taken over, and closed down immediately, while in 1993 BA bought 25% of the shares in the Australian national airline Quantas (as sold on further in 2004). In 1998, American Airlines, British Airways, Canadian Airlines, Cathay Pacific Airways and Qantas Airways created the new Oneworld alliance. In 1999, BA took 9% of the shares in Iberia Lineas de Espana and finalised a purchase of CityFlyer Express. In 2000, BA bought an 18.3% stake in its South African franchiseholder Comair lines. That same year, 86% of the shares were sold to Air Liberté lines. In 2001, British Regional and CitiExpress were merged into a single carrier called British Airways CitiExpress. In 2012, BA took over British Midland Airways.

A characteristic feature of BA is its outsoucing of flights to other carriers under so-called franchise agreements (*i.a.* with CityFlyer Express, Manx Airlines Europe, National Jet Italia, and Zambian Air Services).

The core of carriage companies in which BA is the sole shareholder are BA Cityflyer, British Midland Airways and OpenSkies. In addition, the carrier also now indirectly holds minority stakes in South African Comair (11%) and British Flybe (14.6%), as well as directly 0.3% in International Consolidated Airlines Group, a corporation formed between BA and Spanish Iberia.

The Group's fleet has 273 aircraft, including 247 aeroplanes in the colours of BA. These are mainly Airbus A319s, A320s and A321s, as well as Boeing 737s, 747s, 767s and 777s. Other aircraft are used by affiliates, i.e. BA Cityflyer and OpenSkies.

In 2012, on the Polish market, scheduled BA flights were used by 167,662 passengers, including customers of Polish tour operators such as Rainbow Tours, Almatur Polska, the Trade & Travel Company and Atas.

Sources:

(1) *British Airways plc. Annual Report and Accounts. Year ended 31 December 2012*;
(2) www.britishairways.com (8.04.2014);
(3) www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014).

5.3. Air charter carriers in the service of Polish tour operators

While scheduled air traffic only to some unidentified extent takes part in the servicing of the Polish market, charter traffic serves foreign tourist flights almost exclusively. The difference between the number of all passengers on charter flights and flights in international traffic is of 128,515 people (these calculations being based on data for Polish airports, collected by the country's Civil Aviation Authority (ULC)). The difference reflects commissioned flights, flights for firms, as well as the necessity for the supplying/retrieval of some participants of excursions to/from hubs prior to departures abroad. The charter market is also extremely seasonal, with maximum during the Summer holidays (July-September) and minimum in Winter (December-February).

The charter market is also very much differentiated, and characterised by variations in operations and ownership. The majority of charter carriers are in private hands.

According to the ULC data, a dominant share among charter lines on the Polish market is taken by 25 carriers, which serve 96.79% of all passengers. The remaining 3.21% of passengers are served by as many as 101 charter carriers, sometimes very exotic: it may be supposed that the cooperation between tour operators and these firms is of a more incidental nature, not being based around permanent agreements at least. Table 10 gives a concise characterisation of carriers, and of the tour operators cooperating with them. Unlike with scheduled air traffic, in an absolute majority of cases it has been possible to determine which tour operators collaborate with which charter carriers.

Table 10. The largest charter air carriers servicing Polish tour operators (as of 31 December 2012)

Carrier	Seat (locality, country)	Type of activity (airlines)	Ownership form	Year of establishment	No. of passengers on the Polish market	Passenger fleet (total)	Tour operators in Poland served	Remarks
Enter Air	Warsaw, Poland	charter	private	2009	981,698	12	Itaka, Alfa Star, Neckermann Polska, Rainbow Tours, Grecos Holiday, Viva Club Polska, GTI Travel Polska, 7islands, Wygoda Travel (with affiliate Comfort Club), Otium Polska, TUI Poland, Wezyr Holidays, Exim Tours, Sun & Fun Holidays, Easy Travel	ownership of 2 main and many small shareholders
Travel Service a.s.	Prague, Czech Republic	scheduled & charter	private	1997	587,492	27	Itaka, Exim Tours, TUI Poland, Neckermann Polska, Sun & Fun Holidays, Ecco Holiday, Grecos Holiday, Wezyr Holidays, Viva Club Polska, 7islands, Easy Travel	
Small Planet Airlines	Vilnius, Lithuania	charter	private	2008	239,539	10	TUI Poland, Alfa Star, Neckermann Polska, Exim Tours, Wezyr Holidays, Viva Club Polska, GTI Travel Polska, 7islands, Easy Travel	
OLT Express Poland	Warsaw, Poland	scheduled & charter	private	2011	188,577	11	Sun & Fun Holidays, TUI Poland, Alfa Star, Itaka, Wezyr Holidays, Rainbow Tours and others	activity terminated on 31 July 2012
Travel Service Polska	Warsaw, Poland	charter	private	2011	184,457	1	GTI Travel Polska, Wygoda Travel (with affiliate Comfort Club)	ownership of Travel Service a.s.
Bingo Airways	Warsaw, Poland	charter	private	2011	173,274	2	Itaka, Exim Tours, Sun & Fun Holidays, Wezyr Holidays, Viva Club Polska, GTI Travel Polska, Easy Travel	ownership of Vademecum company + 2 shareholders

LOT Polish Airlines + EuroLOT	Warsaw, Poland	scheduled & charter	state	1929	101,638	37 + 24 (EuroLOT)	Itaka, Rainbow Tours, Neckermann Polska, Exim Tours, Ecco Holiday + Ecco Travel, Furnel Travel International, Wezyr Holidays, Almatur Polska, Trade & Travel Company, Grecos Holiday, Oasis Tours, Viva Club Polska, Active Travel, Espace Trans, Delta Travel, Top Travel Incentives	
Nouvelair	Monastir, Tunisia	scheduled & charter	private	1989	101,037	13	TUI Poland, Neckermann Polska, Exim Tours, Wezyr Holidays, Viva Club Polska	
Pegasus Airlines	İstanbul, Turkey	scheduled	private	1990	91,261	40	Wezyr Holidays, GTI Travel Polska	
SprintAir	Warsaw, Poland	scheduled & charter	private	2003	84,916	3	Wezyr Holidays, Oasis Tours	plus 14 cargo aircraft
Air Cairo	Cairo, Egypt	charter	state	2003	84,344	4	Alfa Star, Exim Tours, Bee & Free, Wezyr Holidays, Viva Club Polska	60% shares of Egypt Air
Nesma Airlines	Cairo, Egypt	charter	private	2010	54,633	3	Alfa Star	
Sky Airlines	Antalya, Turkey	charter	private	2000	47,144	7	TUI Poland, Wezyr Holidays, GTI Travel Polska	
Corendon Airlines	Antalya, Turkey	low-cost	private	2004	30,647	6	Bee & Free, Grecos Holidays	
YES Airways	Warsaw, Poland	charter	private	2011	28,674	3	Itaka, Exim Tours, Sun & Fun Holidays, Wezyr Holidays, Viva Club Polska, GTI Travel Polska, Easy Travel	
Bulgarian Air Charter	Sofia, Bulgaria	charter	private	2000	26,446	8	BTH Gama	

Carrier	Seat (locality, country)	Type of activity (airlines)	Ownership form	Year of establishment	No. of passengers on the Polish market	Passenger fleet (total)	Tour operators in Poland served	Remarks
Aegean Airlines	Athens, Greece	scheduled & charter	private	1987	18,583	29	TUI Poland, Ecco Holiday, Grecos Holiday	
Arkia Israeli Airlines	Tel-Aviv, Israel	scheduled & charter	private	1949	18,499	8	no data	
Freebird Airlines	İstanbul, Turkey	charter	private	2000	13,450	7	Wezyr Holidays	
El Al Israel Airlines	Tel-Aviv, Israel	scheduled	state-private	1948	12,135	38	Trade & Travel Company	
Air Arabia	Sharjah, UAE	low-cost	state-private	2003	10,965	31	Wezyr Holidays	
Israir Airlines	Tel-Aviv, Israel	scheduled	private	1989	10,018	4	no data	
Onur Air	İstanbul, Turkey	low-cost & charter	private	1992	8,968	26	TUI Poland, Ecco Holiday	
Syphax Airlines	Sfax, Tunisia	hybrid	private	2011	7,590	2	Wezyr Holidays	activity started up in April 2012
Thomas Cook Airlines	Manchester, UK	charter	private	1999	4,858	32	Neckermann Polska	ownership of Thomas Cook Group

Authors' own elaboration, mainly on the basis of: (1) data of Poland's ULC (Civil Aviation Authority); (2) catalogues and websites of tour operators; (3) websites of carriers; (4) www.infoveriti.pl.

The largest share among the charter carriers is that taken by the private Polish airline Enter Air, which serves more than 30.54% of all passengers and cooperates with at least 16 large tour operators. What is of interest is that a turnover of some 750 million zloties is achieved on the basis of a fleet consisting of just 12 aircraft. Besides the Polish market, the line is also present in France (with a base at Paris-Charles de Gaulle Airport), in the Czech Republic (Prague Ružine Airport), and to some extent also in Italy and Spain. Annually, Enter Air carries about 1.5 million passengers, including 981,698 on connections from/to Poland (Table 11; see also: Box 20 in Chapter 5.3.4).

Table 11. Passengers served at Polish airports in charter traffic, divided by carriers (2012)

Carrier	Passengers	
	Number	Percentage
Enter Air	981,698	30.54
Travel Service a.s.	587,492	18.28
Small Planet Airlines	239,539	7.45
OLT Express Poland	188,577	5.87
Travel Service Polska	184,457	5.74
Bingo Airways	173,274	5.39
LOT Polish Airlines + EuroLOT	101,638	3.16
Nouvelair	101,037	3.14
Pegasus Airlines	91,261	2.84
SprintAir	84,916	2.64
Air Cairo	84,344	2.62
Nesma Airlines	54,633	1.70
Sky Airlines	47,144	1.47
Corendon Airlines	30,647	0.95
YES Airways	28,674	0.89
Bulgarian Air Charter	26,446	0.82
Aegean Airlines	18,583	0.58
Arkia Israeli Airlines	18,499	0.58
Freebird Airlines	13,450	0.42
El Al Israel Airlines	12,135	0.38
Air Arabia	10,965	0.34
Israir Airlines	10,018	0.31
Onur Air	8,968	0.28
Syphax Airlines	7,590	0.24
Thomas Cook Airlines	4,858	0.15
Other carriers (101)	103,284	3.21

Source: www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014), Urząd Lotnictwa Cywilnego (Civil Aviation Authority).

A large share in the servicing of the Polish charter market (18.28%) has been taken by the Czech-based private carrier Travel Service, as well as its affiliate Travel Service Polska (5.74%). The two carriers cooperate with a dozen or so tour operators but – interestingly – each deals with a different set. The Lithuanian private charter carrier Small Planet Airlines also takes a substantial share (7.45%) in the servicing of passengers in Poland. Active for several months only, OLT Express Poland carried 5.87% of all passengers in 2012, while the other private Polish airline – Bingo Airways took 5.39%. Alongside scheduled services, charter flights are also provided by state-owned LOT Polish Airlines, jointly with its affiliate EuroLOT (with the two combined taking a 3.16% share). The list of the largest charter operators, transporting over 100,000 people, is completed by the Tunisian Nouvelair (3.14%). The remaining smaller charter carriers are mainly from reception countries, such as Egypt, Turkey, Greece, Bulgaria, Israel and the United Arab Emirates.

As may already be seen, it is charter carrier airlines from Central and Eastern Europe that prevail here, Polish companies most of all. The Polish carriers' share is 61.82% of passengers, and this is of course a much higher figure than was observed in the case of the scheduled flights. This is mainly a result of Enter Air, OLT Express Poland, Travel Service Polska, Bingo Airways, LOT Polish Airlines + EuroLOT, SprintAir, and YES Airways.

5.3.1. Air charter carriers by number of entities

Charter carriers operating on the Polish market commenced with their activity during various periods, albeit most frequently (in 28% of cases) before 1991. However, the domination of that period is not as explicit as in the case of the scheduled carriers (Figure 36). It is possible to note how a substantial number of charter lines serving our market have started up with their activities within the last two decades, in a period of mass growth of tourism traffic not in Poland only, but also in reception countries (Turkey, Egypt, Tunisia and the United Arab Emirates), as well as in the neighbouring Czech Republic and Lithuania (Figure 37).

More than half of all service providers are scheduled carriers (including low-costs and hybrid forms), while 44.0% have specialised in the servicing of charter flights. Scheduled carriers dominate in Israel, Tunisia, the UAE, Turkey, Greece and the Czech Republic, while in other countries the situation is the opposite – all or a majority are charter operators (Figure 38). The situation in Poland is such that 57.14% of all operators are charter carriers.

84.0% of all operators are privately-owned firms, 8.0% public and the rest with 'mixed' public and private capital. Private carriers dominate in a majority of countries in which operators are registered. It is only in Poland and Egypt that private and public firms are present, while in the UAE and Israel there is 'mixed' public-private capital (in the latter, besides private, Figure 39).

When the countries of origin of charter carriers are taken into account, it is noted that 28.0% of all companies are from Poland, 20.0% from Turkey, 12.0% from Israel, and just one or two firms from each of the remaining countries (Egypt and Tunisia) (Figure 36).

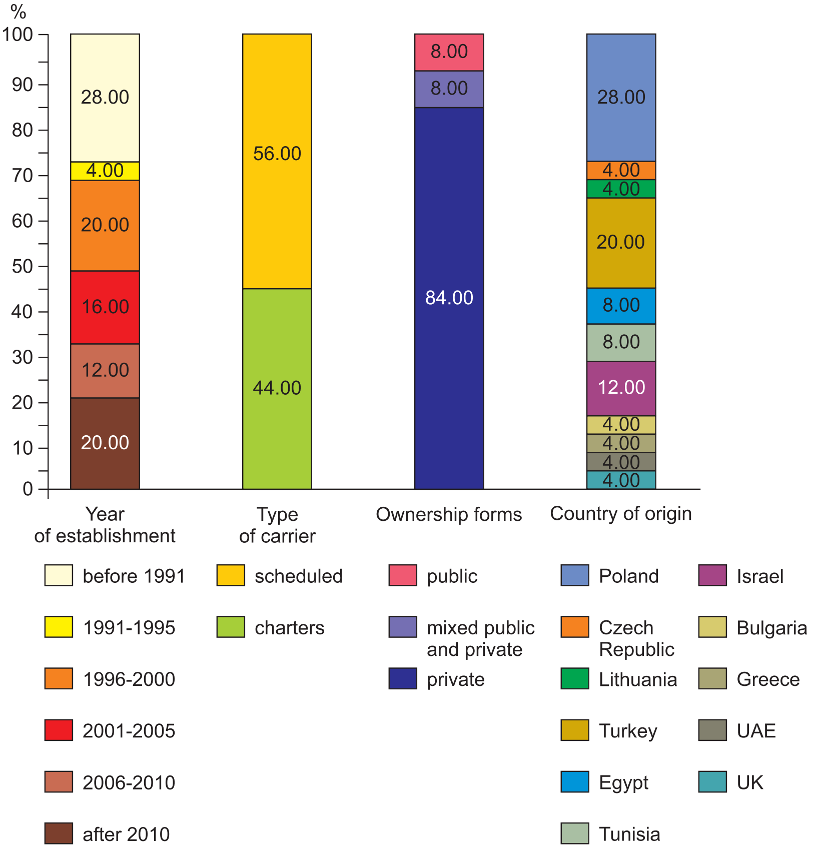


Fig. 36. Charter-airline structure by number of entities, as of 31 December 2012

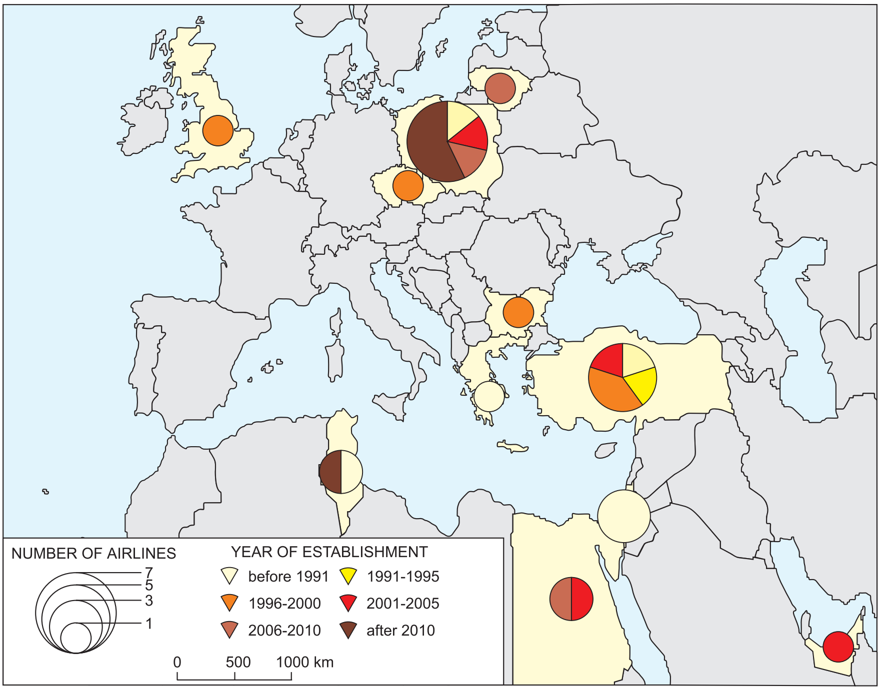
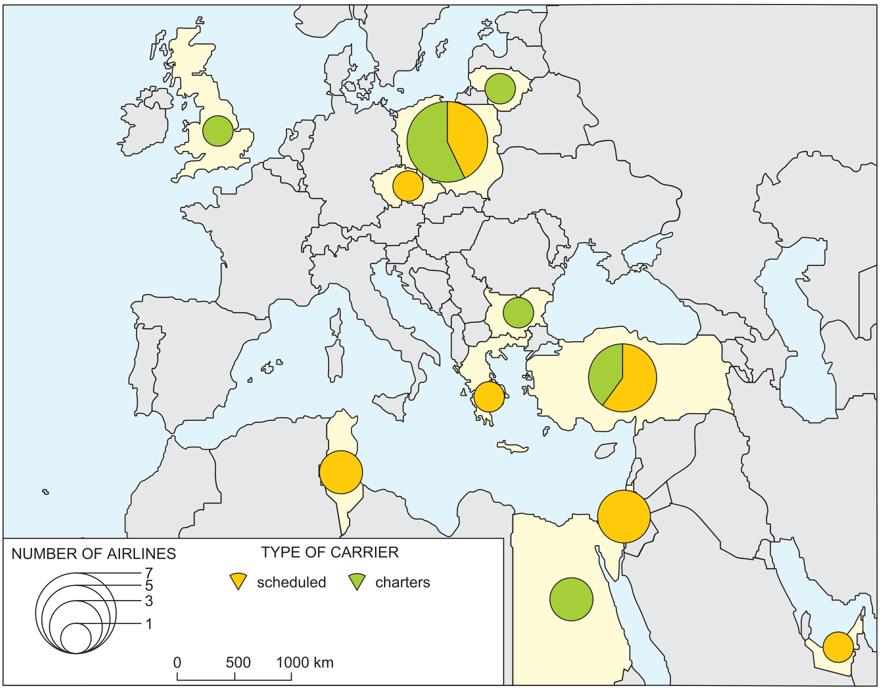


Fig. 37. Charter airlines – year of establishment and number of entities



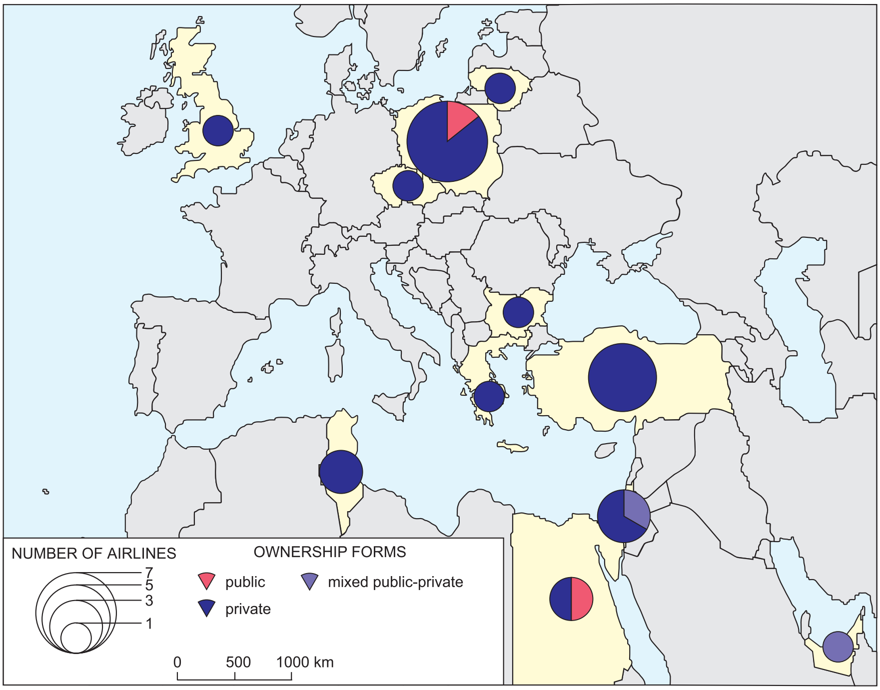


Fig. 39. Charter airlines – form of ownership compared with number of entities

5.3.2. Air charter carriers by numbers of passengers served on the Polish market

Of greater interest is the structure of charter carriers by numbers of passengers served on the Polish market. Most passengers (no fewer than 41.01% of the total) are served by companies established relatively recently, in the years 2006-2010, while yet more have opted for others founded in the last two decades (Figure 40). This is a certain specific feature of the air market on which, besides the low-costs, fastest development is being manifested by charter operators.

When numbers of passengers served are taken into account, it is Polish carriers that are again seen to be of greatest importance (accounting for 56.03% of the total). Our charter operators are thriving and young firms, established in the last two periods, and prevailing to the extent that they determine the spatial picture of the phenomenon (Figure 41). Also of greater significance in serving larger numbers of passengers are Czech (18.89%) and Lithuanian (7.70%) carriers, followed later in the hierarchy by others that are Turkish and Egyptian. Others play only a marginal role as regards numbers of tourists served.

Fig. 38. Charter airlines – type of principal operational activity compared with number of entities

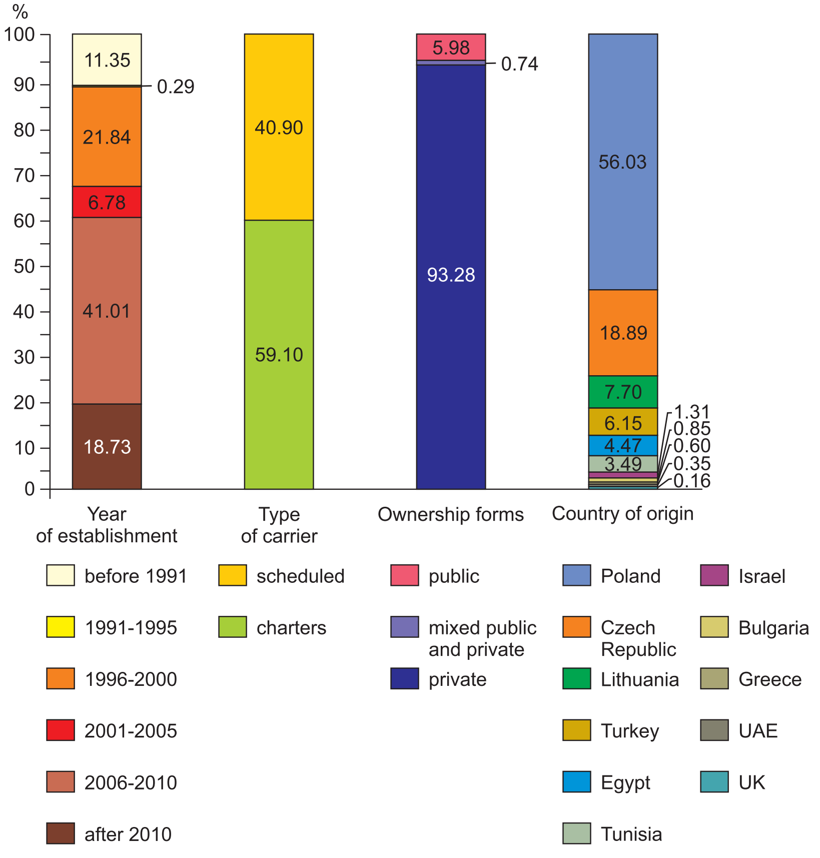


Fig. 40. Charter-airline structure by numbers of passengers on the Polish market, as of 31 December 2012

Own elaboration based on: www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014).

A specific feature of the Polish market is also marked, since a majority of passengers (78.48%) are served by domestic charter carriers, and not in their role as providers of scheduled services, but performing only charter operations. All those using Lithuanian and Egyptian carriers are also customers of charter operators, though the opposite situation applies in the case of the Czech and Tunisian carriers wherein only scheduled operators offer charter flights (Figure 42).

Fig. 42. Charter airlines – type of principal operational activity compared with numbers of passengers on the Polish market

Own elaboration based on: www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014).

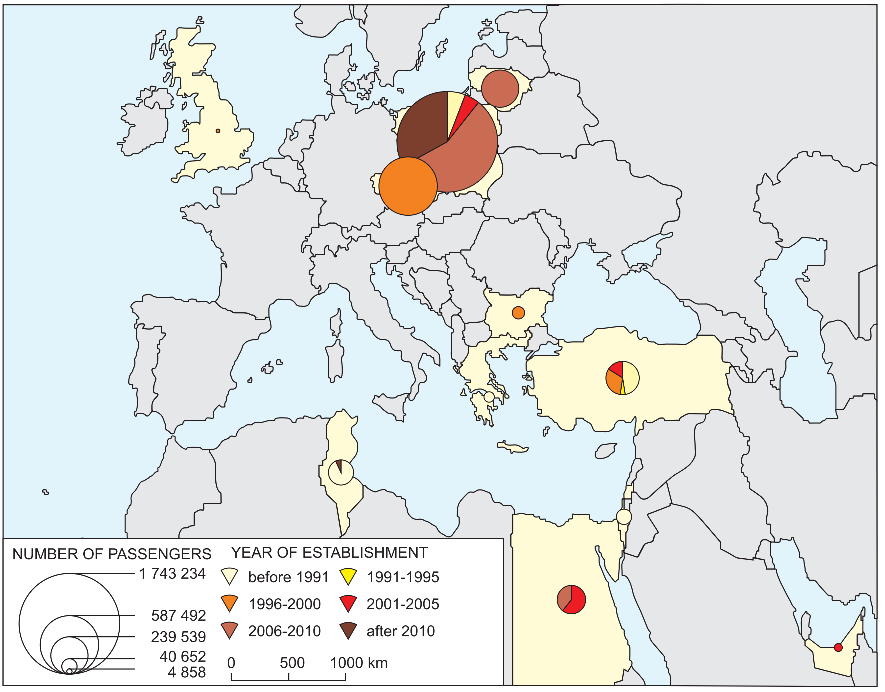
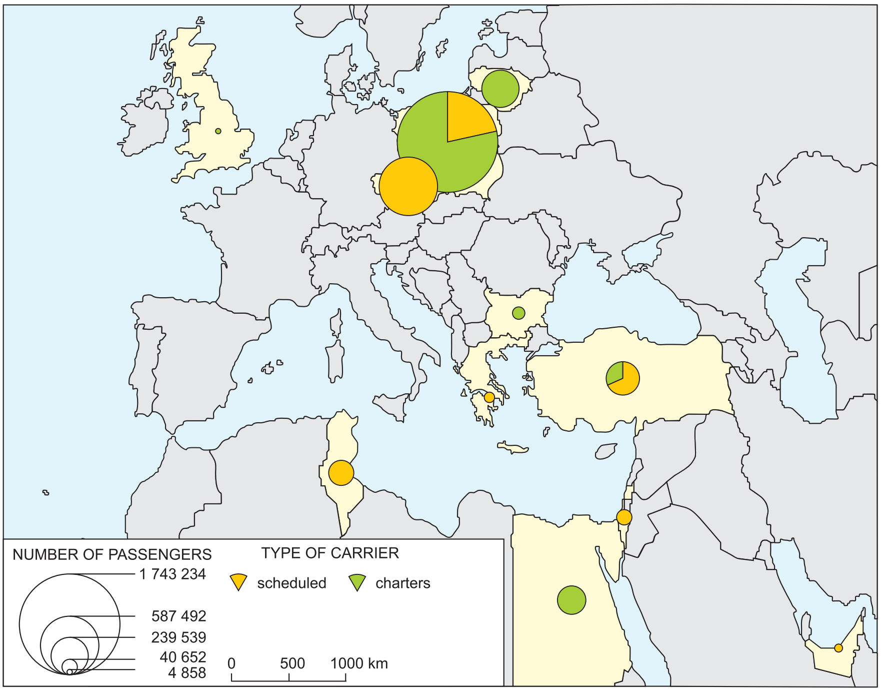


Fig. 41. Charter airlines – year of establishment compared with numbers of passengers on the Polish market

Own elaboration based on: www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014).



While charter carriers are first and foremost private companies, so a majority of customers are also passengers of private operators. Exceptions are Egypt, Israel and Poland, in which private airlines transport 39.31, 70.15 and 94.17% of passengers, respectively (Figure 43).

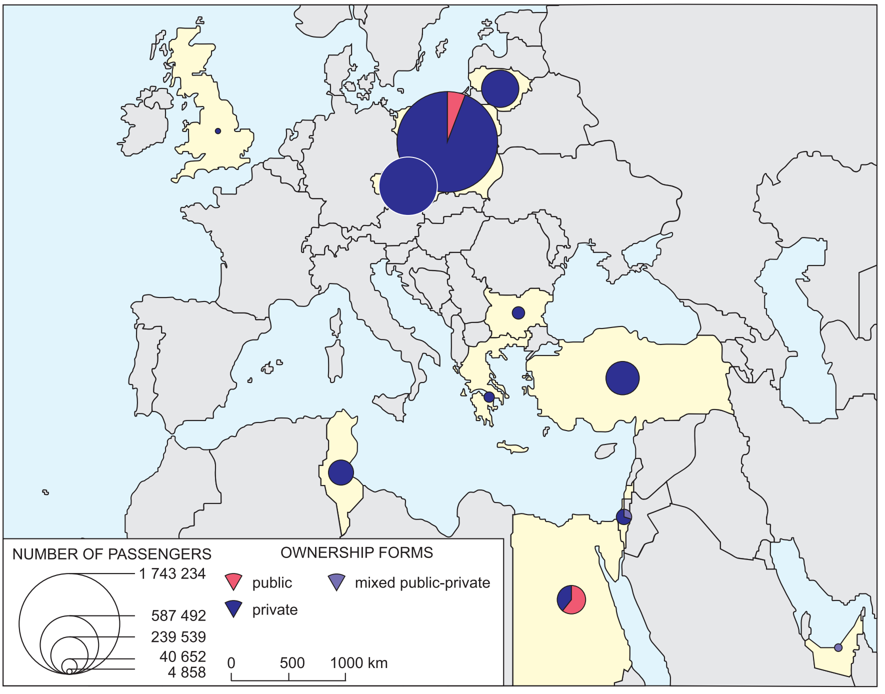


Fig. 43. Charter airlines – forms of ownership compared with numbers of passengers on the Polish market

Own elaboration based on: www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014).

5.3.3. Air charter carriers by size of fleet

By and large, the carriers researched supply a majority of the charter flights from/to Poland with a fleet of 388 aeroplanes in total, which is several times smaller than the fleet of scheduled operators. Exceptions are operators active in both segments of the market, such as LOT Polish Airlines, EuroLOT, Travel Service, Pegasus Airlines, Aegean Airlines, El Al Isreael Airlines, or Onur Air, whose fleets can reach several tens of planes. Regular carriers just providing charter flights are usually airlines with long tradition and history, and because they have been established earlier than specialist charter airlines, they have a dominant 49.74% share in the fleet of companies established before 1991 (Figure 44).

Taking size of fleet into account, all the operators in Israel and Greece, and also a majority in Tunisia and Poland and almost half in Turkey, have been found-

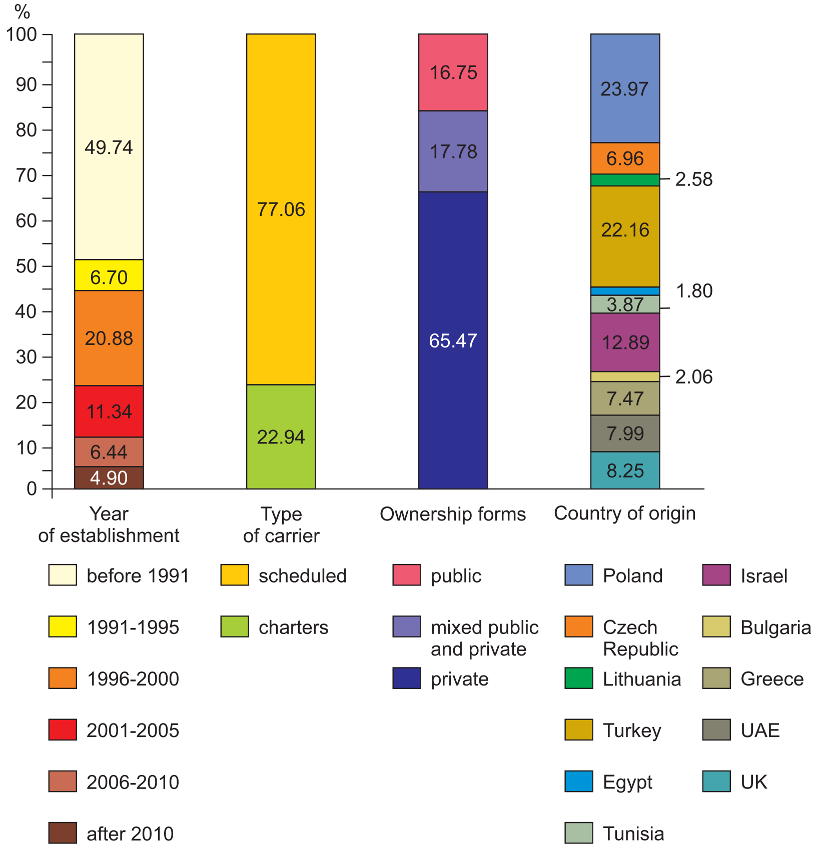


Fig. 44. Charter-airline structure by size of fleet, as of 31 December 2012

ed in the first period of time. Charter carriers in the remaining countries usually come from one period, but later (Figure 45).

Since the fleet of scheduled carriers (albeit engaged in charter carriage) is larger, it is clear that the spatial distribution of the fleet concerned will determine basic operational activity. Scheduled carriers dominate in a majority of the countries researched, with the exception of the UK, Lithuania, Bulgaria and Egypt, where only charter carriers are involved (Figure 46).

Consideration of size of fleet in relation to form of ownership points to a dominance of the private sector in a majority of the countries analysed. Exceptions are four countries where the fleet is not exclusively private, i.e. Poland, in which 65.59% of fleet is in public–sector hands, Egypt with a slightly smaller share for this sector (57.14%), the United Arab Emirates with the whole share of 'mixed' public-private ownership, and finally Israel with a majority (76%) share for this sector (Figure 47).

Overall, the largest fleets used in charter flights in the analysed countries are those of Poland (accounting for 23.97% of the total), Turkey (22.16%) and Israel (12.89%), while the percentages account for by the other countries do not exceed 10 (Figure 44).

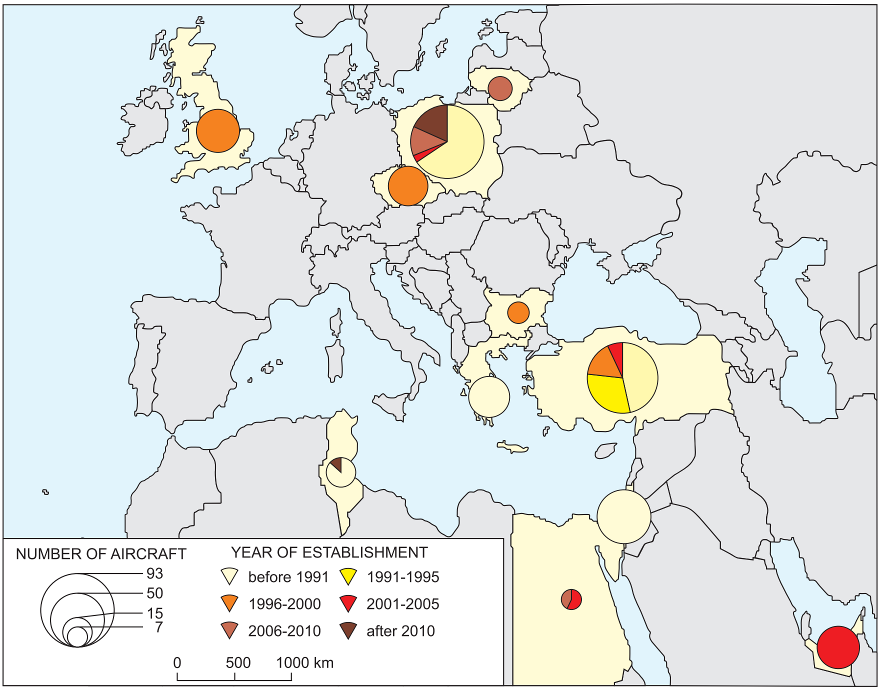


Fig. 45. Charter airlines – year of establishment compared with size of fleet

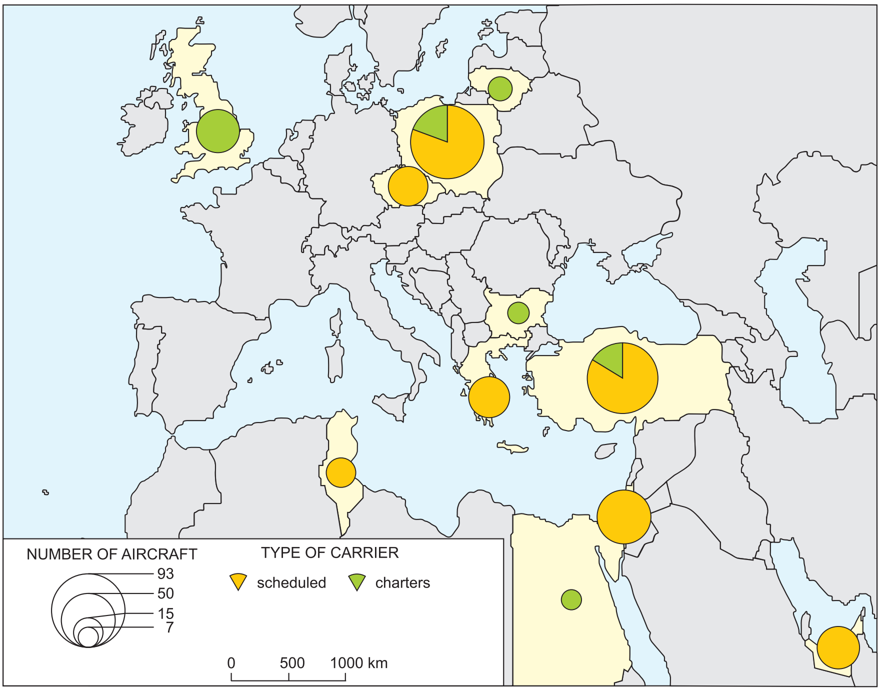


Fig. 46. Charter airlines – type of principal operational activity compared with size of fleet

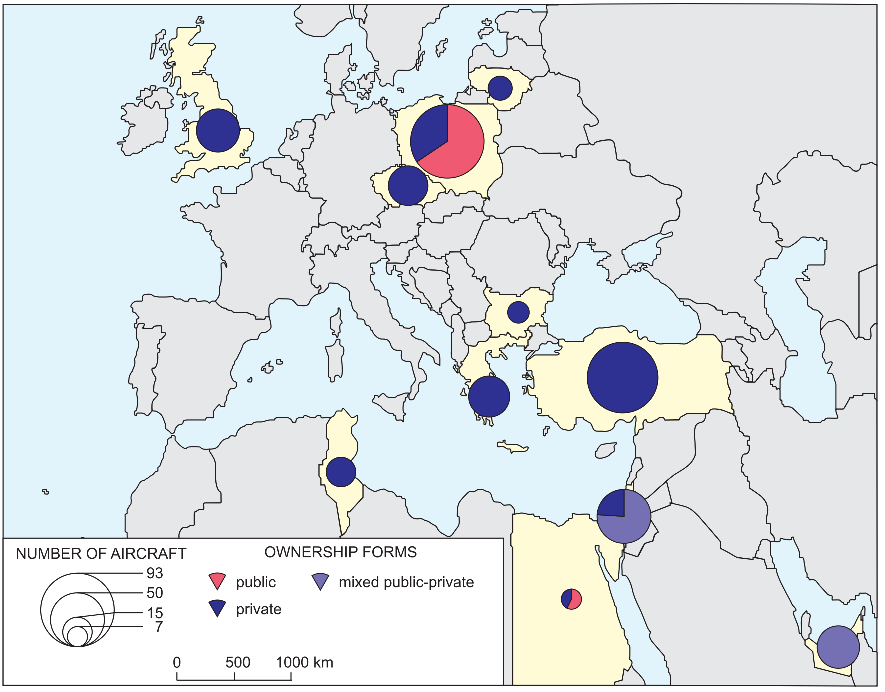


Fig. 47. Charter airlines – forms of ownership compared with size of fleet

5.3.4. Characteristics of the more important charter carriers: case studies

As a reflection of the role played by charter carriers in the servicing of mass organised foreign tourist traffic, characterisations of the 13 most important operators in the segment are presented in what follows (in Boxes 20-32). In the main, these are the largest carriers, though second criteria for selection for inclusion have been geographical variety, origin, destinations served, presence on the market, and so on.

BOX 20 – ENTER AIR

Enter Air is the largest air charter carrier operating on the Polish market (and one of the largest on the European market in general). A wholly-Polish company, it was established in 2009 and is seated in the city of Warsaw. The main shareholder is Marcin Kubrak (with a 65% stake). In Poland, Enter Air transports nearly 1 million people annually (981,698 in 2012). The operator provides services for large tour operators such as Itaka, Alfa Star, Neckermann Polska, Rainbow Tours, Grecos Holiday, Viva Club Polska, GTI Travel Polska, 7Islands, Wygoda Travel (with its affiliate Comfort Club), Otium Polska, TUI Poland, Wezyr Holidays, Exim Tours, Sun & Fun Holidays and East Travel.

The airline has a fleet of (just) 12 aircraft of similar-type Boeing 737s, and operates out of three permanent bases in Poland: Warsaw Chopin Airport, Katowice Airport and Poznań Airport. Enter Air provides services from other Polish airports as well, i.e. Cracow, Wrocław, Gdańsk, Rzeszów, Bydgoszcz, and Łódź.

Charter flights from the Polish airports are organised to such destinations as Bulgaria (Burgas, Varna), Cyprus (Paphos), Croatia (Dubrovnik), Egypt (Hurghada, Sharm el-Sheikh and Marsa Alam), Greece (Athens, Chania (Khania), Heraklion (Iraklion), Corfu, Kos, Rhodes, Salonica and Zakynthos), Spain (Almeria, Barcelona, Lanzarote, Malaga, Palma de Mallorca, Las Palmas, Fuerteventura and Tenerife), Israel (Eilat and Tel-Aviv), Morocco (Agadir), Portugal (Faro), Tunisia (Enfidha), Turkey (Antalya, Bodrum, Dalaman and Izmir) and Italy (Catania and Lamezia Terme).

Sources:
(1) www.enterair.pl (25.03.2014);
(2) www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014);
(3) www.tanie-loty.com.pl (4.02.2014); (4) www.infoveriti.pl (7.03.2013).

BOX 21 – TRAVEL SERVICE & TRAVEL SERVICE POLSKA

Second position on the Polish market of charter carriers is taken by the Czech company Travel Service a.s. Registered in Prague and established in 1997, this is a wholly private airline specialising in the servicing of scheduled services (under the brand name Smart Wings), as well as charters and business trips (as Business Jet). On the Polish market, this carrier transports nearly 600,000 passengers (587,492 people in 2012). In 2011, the carrier established an affiliate called Travel Service Polska dedicated to the servicing of the Polish market. Despite a relatively short time in operation, the company has made a position for itself in charter carriage from/to Poland: with 184,457 passengers in 2012. Similar companies function on the Slovak and Hungarian markets. The fleet of the Czech carrier embraces 27 aeroplanes, mainly Boeing 737s, while its Polish affiliate has one aircraft of this type.

Travel Service provide services for such Polish tour operators as Itaka, Exim Tours, TUI Poland, Neckermann Polska, Sun & Fun Holidays, Ecco Holiday, Grecos Holiday, Wezyr Holidays, Viva Club Polska, 7Islands and Easy Travel. In turn, Travel Service Polska provides flights for GTI Travel Polska and Wygoda Travel (with its affiliate Comfort Club). Travel Service serves destinations in Bulgaria (Burgas and Varna), Cyprus (Larnaca and Paphos), Greece (Khania, Iraklion, Kavala, Corfu, Kos and Rhodes), Spain (Barcelona, Ibiza, Lanzarote, Malaga, Menorca, Palma de Mallorca, Las Palmas and Tenerife), Israel (Tel-Aviv), Portugal (Faro and Madeira) and Italy (Catania, Olbia and Palermo). In turn, Travel Service Polska provides flights in the directions of Croatia (Dubrovnik), Spain (Fuerteventura), Morocco (Agadir, Oujda), Tunisia (Djerba, Monastir), and Turkey (Antalya, Bodrum, Dalaman and Izmir).

Sources:
(1) www.travelservice.aero (25.03.2014);
(2) www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014);
(3) www.tanie-loty.com.pl (4.02.2014).

BOX 22 – SMALL PLANET AIRLINES

The largest third charter carrier in Poland by number of passengers (239,539 in 2012), this Lithuanian private airline is registered in Vilnius. Established in 2008, this carrier has a fleet of 10 Boeing 737 and Airbus A320 aircraft, partly registered in Lithuania and partly in Poland (hence the second office in the city of Warsaw, considered in ULC statistics as a Polish carrier). Moreover, a company is active on the British and French markets, carrying nearly 700,000 passengers annually (2012).

Small Planet provides services for TUI Poland, Alfa Star, Neckermann Polska, Exim Tours, Wezyr Holidays, Viva Club Polska, GTI Travel Polska, 7Islands and Easy Travel. More important connections head for Bulgaria (Burgas and Varna), Egypt (Hurghada, Sharm el-Sheikh, Marsa Alam and Taba), Greece (Iraklion, Corfu and Rhodes), Spain (Palma de Mallorca and Tenerife) and Turkey (Antalya and Bodrum).

Sources:
(1) www.smallplanet.aero (25.03.2014);
(2) www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014);
(3) www.tanie-loty.com.pl (4.02.2014).

BOX 23 – OLT EXPRESS POLAND & OLT EXPRESS REGIONAL

This carrier connected with a brand of OLT Express is recalled in the history of Polish civil aviation as having acted improperly, given its sudden bankruptcy in the middle of the 2012 holiday season.

The scheduled and charter OLT Express Poland airline had come into existence in 2011. Primarily it functioned as YES Airways, and after several months of activity was bought by the present owner – the Polish capital group Amber Gold. In early 2012, having three aircraft under the name of YES Airways it still carried 28,674 tourists for such tour operators as Itaka, Exim Tours, Sun & Fun Holidays, Wezyr Holidays, Viva Club Polska, GTI Travel Polska and Easy Travel. Registered in the city of Warsaw, the Olt Express Poland company carried 188,577 people in Poland on charters, and 164,202 in scheduled traffic.

The second carrier under the brand name of OLT Express is a scheduled airline called OLT Express Regional, which is registered in the city of Gdańsk. It was established in 2001 as Jet Air line, and from 2005 on was in receipt of an air-carrier certificate issued by ULC. In the years 2005–2007 Jet Air was a franchiseholder of LOT Polish Airlines, also running services on less-popular domestic routes from Warsaw Chopin Airport to the cities of Bydgoszcz, Katowice, Łódź and Cracow. When cooperation with LOT was terminated, the carrier transported passengers on its own in relation to the cities of Zielona Góra and Bydgoszcz. In cooperation with Finnish carrier Wingo xprs, Jet Air also offered carriage on this market. In Summer 2011, jointly with YES Airways and a German company Ostfriesische Luftransport (later OLT Express Germany GmbH), it was purchased by the Amber Gold capital group, and commenced activity under the name of OLT Regional Express. The basic activity was combined with scheduled services (687,498 people in 2012), but occasionally also with charters.

The fleet of OLT Express Poland comprises 11 Airbus A319 and A320 aircraft, while the four aeroplanes belonging to OLT Express Regional are ATR42s and ATR72s.

Charter flights of the OLT Express carriers are provided for tour operators such as Sun & Fun, TUI Poland, Alfa Star, Itaka, Wezyr Holidays and Rainbow Tours. Moreover, an important customer is Globe Travel Service, a broker offering seats for other agencies.

The destinations of charter flights are Bulgaria (Burgas), Egypt (Hurghada, Sharm el-Sheikh, Marsa Alam and Taba), Greece (Khania, Iraklion, Rhodes and Zakynthos), Georgia (Batumi) and Turkey (Antalya).

Sources:
(1) pl.wikipedia.org/wiki/OLT_Express (11.03.2014);
(2) www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014);
(3) www.tanie-loty.com.pl (4.02.2014); Tłoczyński (2013).

BOX 24 – BINGO AIRWAYS

This private Polish charter line was established in 2011, having been founded at the initiative of Marek Sidor (21% of shares) and Andrzej Moździerz (also 21%). Other shares belong to the Vademecum company. The seat of the carrier is the city of Warsaw. Annual carriage on the Polish market is of nearly 200,000 passengers (173,274 in 2012), in a fleet that consists of two Airbus A320s.

Bingo Airways provides services for large Polish tour operators, such as Itaka, Exim Tours, Sun & Fun Holidays, Wezyr Holidays, Viva Club Polska, GTI Travel Polska, as well as smaller ones (Easy Travel). Moreover, a partner of the carrier is Globe Travel Services (broker).

Charter flights of Bingo Airways are directed towards Bulgaria (Burgas), Egypt (Hurghada and Sharm el-Sheikh) and Turkey (Bodrum).

Sources:
(1) www.bingoairways.com (26.03.2014);
(2) www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014);
(3) www.tanie-loty.com.pl (4.02.2014); (4) www.infoveriti.pl (7.03.2013).

BOX 25 – NOUVELAIR

One of the major charter carriers on the Polish market is the Tunisian private scheduled and charter airline Nouvelair of Monastir. It has been in existence since 1989, initially as Air Liberté Tunisie (an affiliate of the French Air Liberté line), and post-1995 as a part of the Tunisian Travel Service Group. It is since 2005 that the airline has existed under the present name.

This carrier has 13 aircraft at its disposal, mainly Airbus A320s, and it serves about 100,000 passengers on the Polish market annually (101,037 in 2012). Charter flights (mainly to Tunisia, *i.a.* to Enfidha Airport) are used by such tour operators as TUI Poland, Neckermann Polska, Exim Tours, Wezyr Holidays and Viva Club Polska.

Sources:
(1) www.nouvelair.com (28.03.2014);
(2) www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014);
(3) www.tanie-loty.com.pl (4.02.2014).

BOX 26 – PEGASUS AIRLINES
The Turkish private scheduled Pegasus Airlines have existed since 1990. The İstanbul-seated carrier owned by Esas Holding to the tune of two-thirds, while remaining shares belong to Sevket Sabanci and his family. On the Polish market, the number of charter-flight customers is above 90,000 annually (91,261 in 2012). The fleet embraces 40 aeroplanes, mainly of the Boeing 737 type. Among Polish tour operators, Pegasus Airlines provides charters for Wezyr Holidays and GTI Travel Polska. The airline serves charter flights to Turkey, mainly to Antalya.

Sources:
(1) www. flypgs.com (28.03.2014);
(2) www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014);
(3) www.tanie-loty.com.pl (4.02.2014).

BOX 27 – SPRINTAIR
The Polish private scheduled and charter airline SprintAir has been registered since 2003, initially, from 2004, as Air Polonia Cargo transport commodities. In the same year, it changed its name to Sky Express. Two years later it began with carriage for the Polish Post. In 2007, an affiliate Sky Carrier was created, while in 2008, Sky Express transformed into SprintAir (while Sky Carrier became SprintAir Cargo). In that same year an affiliate UAB SprintAir Kaunas was established in Lithuania. In 2011, SprintAir created the scheduled passenger links Warsaw–Zielona Góra and Warsaw–Bydgoszcz (the latter on the basis of a long-term agreement with LOT Polish Airlines).

The number of passengers carried has grown slowly to nearly 100,000 annually (84,916 in 2012). The fleet dedicated for the charters is of three Saab 340 type aircraft. Charter flights of the carrier are performed for Wezyr Holidays and Oasis Tours, and head for such Spanish destinations as Palma de Mallorca.

Sources:
(1) www.sprintair.eu (28.03.2014);
(2) www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014);
(3) www.tanie-loty.com.pl (4.02.2014).

BOX 28 – AIR CAIRO

Air Cairo, an Egyptian charter carrier of Cairo has been active on the market since 2003. The main shareholders are the Egypt Air national airlines and National Bank of Egypt. This line operating with four Airbus 320 aircraft is a specialist in providing services on European markets (*i.a.* those of Poland, Germany, France, The Netherlands and the Scandinavian countries). Carriage on the Polish market is at the level of nearly 85,000 passengers annually (84,344 in 2012). Among Polish tour operators, Air Cairo provides transport services for Alfa Star, Exim Tours, Rainbow Tours (Bee & Free), Wezyr Holidays and Viva Club Polska. Charters are directed to Egypt (Hurghada and Sharm el-Sheikh).

Sources:
(1) www.flyaircairo.com (30.03.2014);
(2) www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014);
(3) www.tanie-loty.com.pl (4.02.2014).

BOX 29 – NESMA AIRLINES

Nesma Airlines are a private charter carrier registered in Egypt (Cairo), and are in the ownership of the Saudi Nesma Group. Functioning since 2010, the airline uses three Airbus A320 aircraft. On the Polish market the carrier provides services for over 50,000 tourists (54,633 in 2012), sent *i.a.* by the Alfa Star tour operator to Hurghada in Egypt.

Sources:
(1) www.nesmaairlines.com (30.03.2014);
(2) www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014);
(3) www.tanie-loty.com.pl (4.02.2014).

BOX 30 – SKY AIRLINES

The Turkish private charter Sky Airlines has been registered in Antalya since 2000, and wholly belongs to a holding of the Kayi Group (which also includes GTI Travel Polska). On the Polish market it carries nearly 50,000 passengers on charter flights (47,144 in 2012). The fleet of the airline has seven aircraft, mainly of the Boeing 737 and Airbus A321 types, used in the flights to Antalya of such Polish tour operators as TUI Poland, Wezyr Holidays and GTI Travel Polska.

In 2013, simultaneously with the bankruptcy of the GTI Travel tour operator, the airline terminated its activity.

Sources:
(1) pl.wikipedia.org/wiki/Sky_Airlines (1.04.2014);
(2) www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014);
(3) www.tanie-loty.com.pl (4.02.2014).

BOX 31 – CORENDON AIRLINES

The Turkish private low-cost Corendon Airlines (Turistik Hava Tasimacilik) has been in existence since 2004. Serving about two million passengers annually, travelling to 35 countries, the carrier owns a fleet of six Boeing 737 aircraft. Charter flights from/to Poland provide a service for about 30,000 tourists (30,647 in 2012), directed mainly by Rainbow Tours (with its affiliate Bee & Free) and Grecos Holidays to the Turkish resort of Antalya.

Sources:
(1) www.corendonairlines.com (3.04.2014);
(2) www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014);
(3) www.tanie-loty.com.pl (4.02.2014).

BOX 32 – AEGEAN AIRLINES

Aegean Airlines are a private Greek carrier in existence since 1987. The basic activity of the Athens-seated operator comprises regular and charter flights.

Initially (up to 1999), these airlines functioned under the name Aegean Aviation. However, on 1994, the carrier merged with the Vassilakis Group, while five years later Air Greece was taken over. In 2001, Aegean Airlines swallowed Cronus Airlines. Since 2004, the shares of the company have been traded on the Athens Stock Exchange. In 2010, the main shareholders of Aegean Airlines and Olympic Airlines agreed to a fusion of the two companies, and on the basis of the latter a single new entity Olympic Air was established. In that year, Aegean Airlines joined Star Alliance.

As of the end of 2012, the carrier had 29 aircraft, mainly of the Airbus A320 type, while the level of charter carriage on the Polish market is of 18,583 passengers, the carrier services being rendered for such Polish tour operators as TUI Poland, Ecco Holiday and Grecos Holiday.

Sources:
(1) www. aegeanair.com (4.04.2014);
(2) www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014).

5.4. The main destinations of charter flights from Poland in 2012

Data provided on a webpage of the Civil Aviation Authority (www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy), used in conjunction with a report entitled *Loty czarterowe z Polski – lato 2012*, drawn up by the tanie-loty.pl Booking Centre (www.tanie-loty.com.pl) allow considerable familiarity with the main directions of charter flights from/to Poland to be gained, and in relation to several aspects.

Where do Polish tourists using international charter connections within mass organised tourist traffic fly? Like travellers from other parts of Europe, they mainly take charter flights from Poland in a southerly direction, to the Mediterranean, Red Sea, Black Sea and Canary Islands. The largest flows of tourists lead to the Egyptian Hurghada and Sharm el-Sheikh, as well as Turkish Antalya (Table 12, Figure 48). Such a concentration of passenger charter flights probably reflects the choice of destinations located by warm seas, and also offering competitive prices.

Fig. 48. Main destinations of charter flights from Poland by numbers of passengers carried

Own elaboration based on: www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014).

Table 12. Passengers served at Polish airports on international charter flights, as categorised by destination (2012)

Destination	Passengers	
	Number	Percentage
Hurghada	416,575	13.15
Antalya	399,637	12.62
Sharm el-Sheikh	268,590	8.48
Enfidha	143,956	4.55
Heraklion (Iraklion, Crete)	128,210	4.05
Fuerteventura	120,657	3.81
Tel-Aviv	110,722	3.50
Burgas	102,114	3.22
Rhodes	98,489	3.11
Tenerife	98,274	3.10
Bodrum	87,285	2.76
Marsa Alam	72,540	2.29
Palma de Mallorca	68,806	2.17
Kos	60,856	1.92
Chania (Khania, Crete)	55,643	1.76
Monastir	53,217	1.68
Varna	52,754	1.67
Dalaman	51,013	1.61
Kerkyra	49,996	1.58
Izmir	47,806	1.51
Zakynthos	45,555	1.44
Las Palmas	44,939	1.42
Agadir	39,216	1.24
Lanzarote	38,224	1.21
Barcelona	36,398	1.15
Other airports	475,500	15.01
Total (international traffic)	3,166,972	100.00

Source: www.ulc.gov.pl/pl/regulacja-rynku/324-statystyki-i-analizy (10.02.2014), Urząd Lotnictwa Cywilnego (the Civil Aviation Authority).

The remaining several percent of passengers on charter flights from Poland have other centres located within the same geographical area (Table 12). In the eastern part of the Mediterranean one can distinguish Heraklion (Iraklion) on Crete, Tel-Aviv, Greek Rhodes and Kos and Turkish Bodrum. In the western part of the Black Sea the main destinations are Bulgarian Burgas and Varna, and on the coast of Red Sea (apart from Hurghada and Sharm el-Sheikh), the relatively new centre of Marsa Alam. On the southern coast of the Mediterranean it is Enfidha and Monastir in Tunisia that dominate, and in the west Palma de Mallorca and Barcelona. Finally, a last concentration embraces the Canary Islands and Moroccan Agadir. More important destinations on the Canary Islands are Fuerteventura and Tenerife, while more minor ones are Las Palmas and Lanzarote. The main directions taken by charter flights point explicitly to the domination of typical leisure trips where mass organised tourist traffic is concerned.

The report *Loty czarterowe z Polski – lato 2012* – as mentioned above – makes possible a closer look at charter flight departures from individual Polish airports. And although is embraces ten airports offering charter flights in Summer 2012, differences in the methodology of data collection unfortunately denote a lack of full comparability of information. For this reason, a more detailed characterisation will confine itself to charter flights from Warsaw Chopin Airport, as well as the regional Bydgoszcz Airport. The eight other airports included in the report provided information on tour operators, some even on frequencies of flights, but not on carriers serving individual connections.

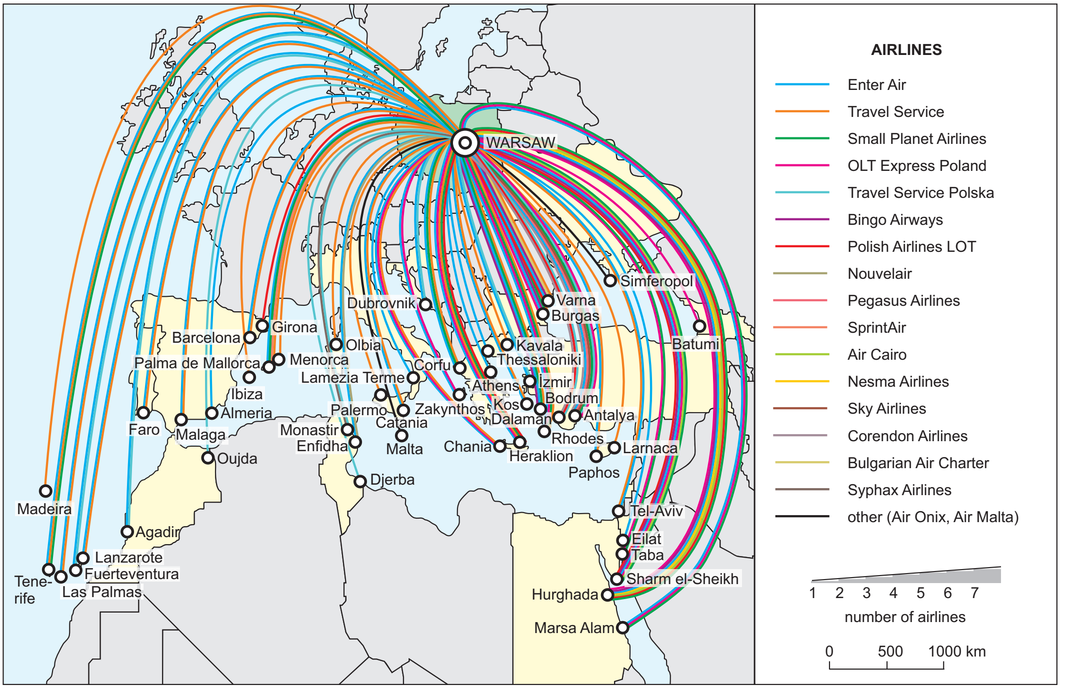


Fig. 49. Main destinations of charter flights from Warsaw by numbers of carriers serving the connection

Own elaboration based on: www.tanie-loty.com.pl (4.02.2014).

Warsaw Chopin Airport has at a disposal the fullest offer of charter flights of any Polish airport. In 2012, 1.37 million passengers used charter flights from Warsaw Airport. They were able to choose from among 49 different charter connections in the Summer of that year (Table 13, Figure 49). A dozen or so carriers provided charter flights on behalf of the majority of the Polish tour operators. The most common destinations were Egyptian Hurghada and Turkish Antalya, as served by seven carriers each, and then Egyptian Sharm el-Sheikh, served by six operators. Five charter carriers provided services to Cretan Heraklion (Iraklion) and to Bulgarian Burgas. Other destinations were served by the smaller number of carriers shown in Table 13.

Table 13. Charter flights from Warsaw Chopin Airport in Summer 2012 by number of carriers

Destination	**Number of airlines**	**Carriers providing the service**
Main destinations		
Hurghada	7	Enter Air, Small Planet Airlines, OLT Express Poland, Bingo Airways, LOT Polish Airlines, Air Cairo, Nesma Airlines
Antalya	7	Enter Air, Small Planet Airlines, OLT Express Poland, Travel Service Polska, Pegasus Airlines, Sky Airlines, Corendon Airlines
Sharm el-Sheikh	6	Enter Air, Small Planet Airlines, OLT Express Poland, Bingo Airways, LOT Polish Airlines, Air Cairo
Enfidha	2	Enter Air, Nouvelair
Heraklion (Iraklion, Crete)	5	Enter Air, Travel Service, Small Planet Airlines, OLT Express Poland, LOT Polish Airlines
Fuerteventura	2	Enter Air, Travel Service Polska
Tel-Aviv	2	Enter Air, Travel Service
Burgas	5	Enter Air, Travel Service, Small Planet Airlines, OLT Express Poland, Bingo Airways
Rhodes	4	Enter Air, Travel Service, Small Planet Airlines, OLT Express Poland
Tenerife	3	Enter Air, Travel Service, Small Planet Airlines
Bodrum	4	Enter Air, Small Planet Airlines, Travel Service Polska, Bingo Airways
Marsa Alam	3	Enter Air, Small Planet Airlines, OLT Express Poland
Palma de Mallorca	4	Enter Air, Travel Service, Small Planet Airlines, Sprint-Air
Kos	2	Enter Air, Travel Service
Chania (Khania, Crete)	3	Enter Air, Travel Service, OLT Express Poland
Monastir	2	Travel Service Polska, Syphax Airlines
Varna	5	Enter Air, Travel Service, Small Planet Airlines, LOT Polish Airlines, Bulgarian Air Charter
Dalaman	3	Enter Air, Travel Service Polska, LOT Polish Airlines
Corfu	3	Enter Air, Small Planet Airlines, Travel Service
Izmir	2	Enter Air, Travel Service Polska
Zakynthos	2	Enter Air, OLT Express Poland
Las Palmas	2	Enter Air, Travel Service
Agadir	2	Enter Air, Travel Service Polska
Lanzarote	2	Enter Air, Travel Service
Barcelona	2	Enter Air, Travel Service

Destination	Number of airlines	Carriers providing the service
Other destinations		
Athens	1	Enter Air
Almeria	1	Enter Air
Batumi	1	OLT Express Poland
Catania	2	Enter Air, Travel Service
Djerba	1	Travel Service Polska
Dubrovnik	2	Enter Air, Travel Service Polska
Eilat	1	Enter Air
Faro	2	Enter Air, Travel Service
Girona	1	LOT Polish Airlines
Ibiza	1	Travel Service
Kavala	1	Travel Service
Lamezia Terme	1	Enter Air
Larnaca	1	Travel Service
Madeira	1	Travel Service
Malaga	2	Enter Air, Travel Service
Malta	1	Air Malta
Menorca	1	Travel Service
Olbia	1	Travel Service
Oujda	1	Travel Service Polska
Palermo	1	Travel Service
Paphos	2	Enter Air, Travel Service
Simferopol	1	Air Onix
Taba	2	Small Planet Airlines, OLT Express Poland
Thessaloniki (Salonica)	1	Enter Air

Authors' own elaboration based on: www.tanie-loty.com.pl (4.02.2014).

What are the origins of the carriers serving charter connections from Warsaw (Table 14, Figure 50)? The majority of the airlines in fact come either from Poland (Enter Air, LOT Polish Airlines, OLT Express Poland, Travel Service Polska, Bingo Airways, SprintAir), or from the neighbouring Czech Republic (Travel Service) and Lithuania (Small Planet Airlines). Then there are the cases of Bulgaria (only in the case of Varna does Bulgarian Air Charter also fly), Croatia, Cyprus, Egypt (Air Cairo and Nesma Airtlines also fly to Hurghada and Sharm el-Sheikh), Georgia, Greece, Israel, Italy, Morocco, Portugal and Spain. Only the links with Malta and Ukraine are served by airlines from the destination countries (Air Malta and Air Onix, respectively). In the case of Turkey, besides the Polish and Lithuanian carriers, there are also three Turkish operators providing connections (Pegasus Airlines, Sky Airlines, Corendon Airlines), while the two Polish lines flying to Tunisia are joined by the Tunisian Nouvelair and Syphax Airlines.

Table 14. Charter flights from Warsaw Chopin Airport in Summer 2012 by country of origin of carrier

Destination		Country of origin of carrier	Number of airlines	Total number of airlines
Country	Airport			
Bulgaria	Burgas	Poland	3	5
		Czech Republic	1	
		Lithuania	1	
	Varna	Poland	2	5
		Czech Republic	1	
		Lithuania	1	
		Bulgaria	1	
Croatia	Dubrovnik	Poland	2	2
Cyprus	Larnaca	Czech Republic	1	1
	Paphos	Poland	1	2
		Czech Republic	1	
Egypt	Hurghada	Egypt	2	7
		Poland	4	
		Lithuania	1	
	Sharm el-Sheikh	Egypt	1	6
		Poland	4	
		Lithuania	1	
	Marsa Alam	Poland	2	3
		Lithuania	1	
	Taba	Poland	1	2
		Lithuania	1	
Georgia	Batumi	Poland	1	1
Greece	Athens	Poland	1	1
	Chania (Khania, Crete)	Poland	2	3
		Czech Republic	1	
	Heraklion (Iraklion, Crete)	Poland	3	5
		Czech Republic	1	
		Lithuania	1	
	Kavala	Czech Republic	1	1
	Corfu	Poland	1	3
		Czech Republic	1	
		Lithuania	1	
	Kos	Poland	1	2
		Czech Republic	1	
	Rhodes	Poland	2	4
		Czech Republic	1	
		Lithuania	1	
	Thessaloniki (Salonica)	Poland	1	1
	Zakynthos	Poland	2	2
Israel	Tel-Aviv	Poland	1	2
		Czech Republic	1	
	Eilat	Poland	1	1

Destination		Country of origin of carrier	Number of airlines	Total number of airlines
Country	Airport			
Italy	Catania	Poland	1	2
			1	
	Lamezia Terme	Poland	1	1
	Olbia	Czech Republic	1	1
	Palermo	Czech Republic	1	1
Malta	Malta	Malta	1	1
Morocco	Agadir	Poland	2	2
	Oujda	Poland	1	1
Portugal	Faro	Poland	1	2
		Czech Republic	1	
	Madeira	Czech Republic	1	1
Spain	Almeria	Poland	1	1
	Barcelona	Poland	1	2
		Czech Republic	1	
	Girona	Poland	1	1
	Ibiza	Czech Republic	1	1
	Lanzarote	Poland	1	2
		Czech Republic	1	
	Malaga	Poland	1	2
		Czech Republic	1	
	Menorca	Czech Republic	1	1
	Palma de Mallorca	Poland	2	4
		Czech Republic	1	
		Lithuania	1	
	Fuerteventura	Poland	2	2
	Las Palmas	Poland	1	2
		Czech Republic	1	
	Tenerife	Poland	1	3
		Czech Republic	1	
		Lithuania	1	
Tunisia	Enfidha	Poland	1	2
		Tunisia	1	
	Djerba	Poland	1	1
	Monastir	Poland	1	2
		Tunisia	1	
Turkey	Antalya	Poland	3	7
		Lithuania	1	
		Turkey	3	
	Bodrum	Poland	3	4
		Lithuania	1	
	Dalaman	Poland	3	3
	Izmir	Poland	2	2
Ukraine	Simferopol	Ukraine	1	1

Authors' own elaboration based on: www.tanie-loty.com.pl (4.02.2014).

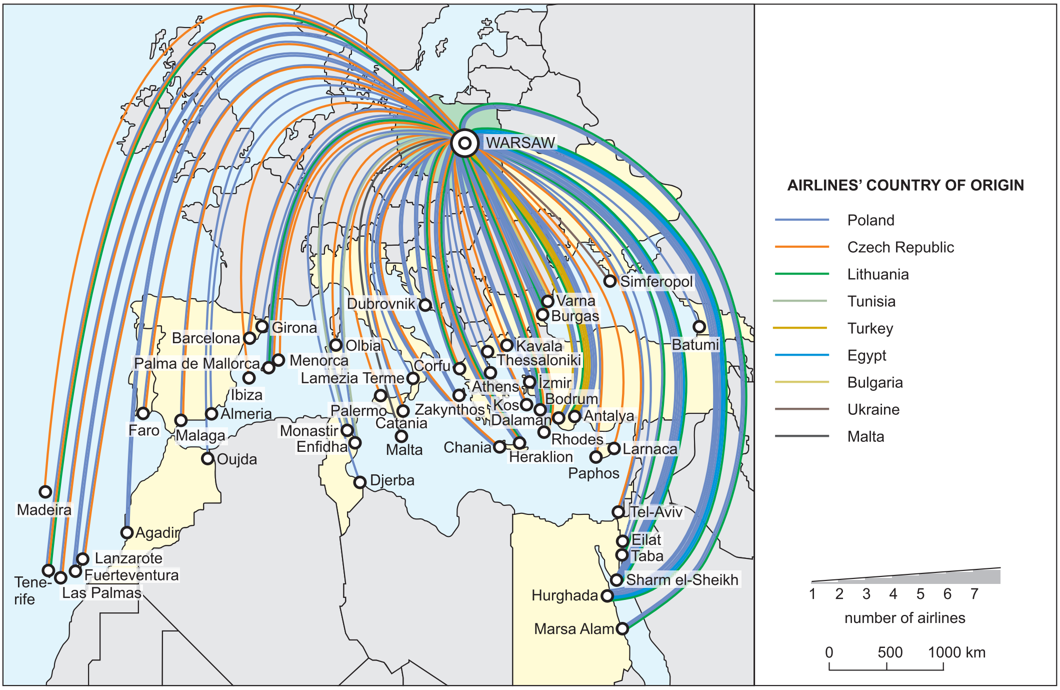


Fig. 50. Main destinations of charter flights from Warsaw by numbers of carriers serving the connection and country of registration

Own elaboration based on: www.tanie-loty.com.pl (4.02.2014).

Bydgoszcz Airport is one of the smallest regional airports in Poland, serving a total of 358,052 passengers (2012). This airport offers its travellers few scheduled connections, in that the only carrier providing scheduled foreign flights is the Irish low-cost Ryanair. The network of connections is enriched by charter flights, of which there were ten in the summer season in 2012, made use of by 32,186 passengers in total. Thanks to the charter connections, the inhabitants of the city of Bydgoszcz and the surrounding area can travel to the Canary Islands, Greece, Croatia, Bulgaria, Tunisia, Turkey and Egypt (Figure 51, Table 15).

In Summer, excursions from Bydgoszcz are offered by TUI Poland, Rainbow Tours, Itaka, Oasis Tours, Grecos Holiday, GTI Travel Poland, Exim Tours, Alfa Star, Neckermann Polska, Wezyr Holidays and 7islands, and also by Triada and Sky Club, which have since closed down (cf. footnote 4). Tour operators use the services of five carriers providing charter flights, i.e. Air Cairo, Enter Air, Bingo Airways, SprintAir and OLT Express Poland. With the exception of the Egyptian Air Cairo, all of these are Polish carriers.

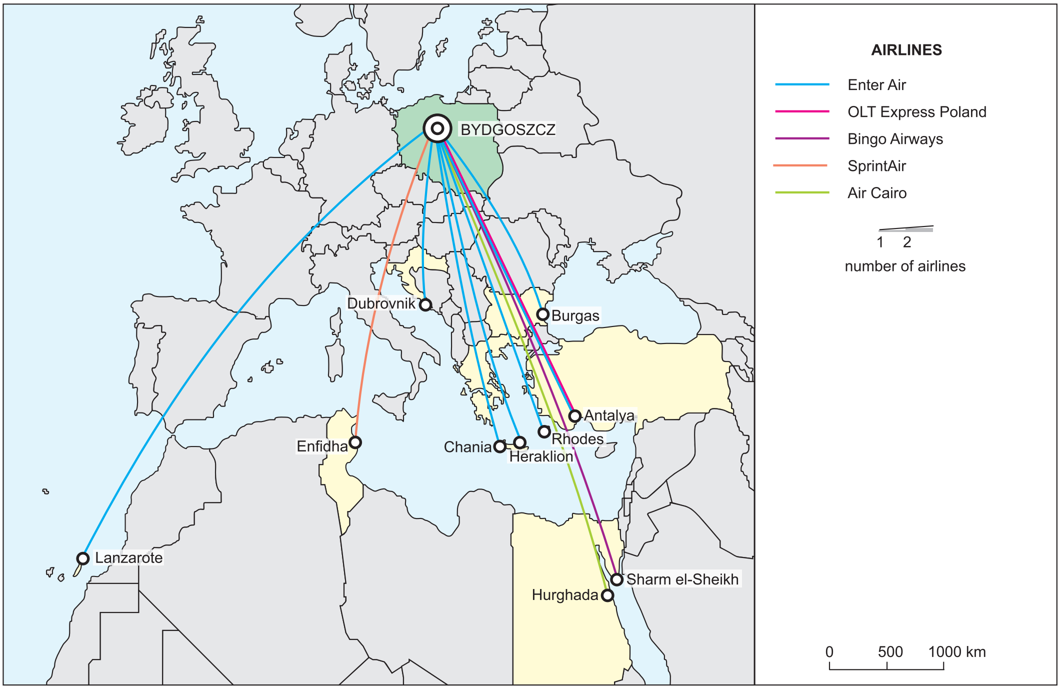


Fig. 51. Main destinations of charter flights from Bydgoszcz by numbers of carriers serving the connection
Own elaboration based on: www.tanie-loty.com.pl (4.02.2014).

Table 15. Charter flights from Bydgoszcz Airport in Summer 2012 by number of carriers

Destination	**Number of airlines**	**Carriers providing the service**
Hurghada	1	Air Cairo
Antalya	2	Enter Air, OLT Express Poland
Sharm el-Sheikh	1	Bingo Airways
Enfidha	1	SprintAir
Heraklion (Iraklion, Crete)	1	Enter Air
Burgas	1	Enter Air
Rhodes	1	Enter Air
Chania (Khania, Crete)	1	Enter Air
Lanzarote	1	Enter Air
Dubrovnik	1	Enter Air

Authors' own elaboration based on: www.tanie-loty.com.pl (4.02.2014).

5.5. Résumé: air carriers in the service of organised tourist traffic

These days the aeroplane plays the decisive role in the servicing of mass organised tourist traffic. This statement is above all true when related to foreign outward tourism, which prevails among the instances of travel organised by Polish tour operators. The cooperation between tour operators and air carriers is conditioned by various factors:

(1) 'historical' – with whom has the tour operator cooperated on a given route in the past;
(2) geographical or equipment-related – determining who is able to provide flight(s) on a given route;
(3) cost-related, reflecting the identifies of firms able to propose the most competitive price for carriage;
(4) the safety and credibility of the carrier.

While in the case of scheduled air carriers, it is difficult to determine what proportion of passengers in fact travel in connection with organised tourism, in the case of charter flights all or nearly all passengers are participants of mass organised tourist traffic. In the latter case it is even possible to determine some dependent relationships of a statistical nature. Thus, between the number of passengers transported by individual carriers (25) offering charter flights from/to Poland and the number of participants of tourist events organised by the top 38 Polish tour operators (Figure 52), there is a linear relationship assuming the form:

$$y = 2.056312x - 39924.794767,$$

where x is the number of participants in tourist events,
y is the number of charter-flight passengers.

The linear regression model obtained achieves statistical significance, with a correlation coefficient of $r = 0.9559119$, and a determination coefficient $r^2 = 0.9156804$.

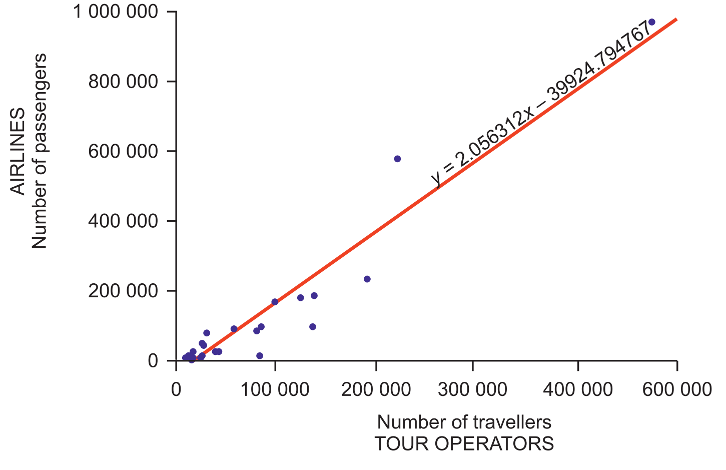


Fig. 52. Linear regression model for the relationship between numbers of participants in tourist events and numbers of charter-flight passengers

There are also dependent relationships between the number of charter-flight passengers from/to Poland and turnover resulting from the organisation of tourist events (by our tour operators), though the directional coefficients are not statistically significant.

Last but not least, the direction of the bulk of flights (from north to south, and back) explains the relatively limited involvement of the low-costs in the servicing of organised tourist traffic. As is known from elsewhere, the majority of low-cost connections take a completely different course, namely in the east-west direction (Dobruszkes, 2009), and therefore cannot serve mass organised tourist traffic very readily.

6. ROAD CARRIERS IN THE SERVICE OF POLISH TOUR OPERATORS

Coach is the second most-used means of transport among the tour operators researched. It was even more typical for coaches to be made use of in the 1990s, but with increased affluence in Polish society, and a partial change in the nature of foreign outward travel from touring excursions (sightseeing) to typical leisure (holiday) tours, the role played by coaches has been in gradual decline. The coach allows for the avoidance of problems with transfer, luggage, fixing travel formalities, a knowledge of foreign languages, and so on. "Coach tours are in the main cheaper than air travels, and frequently also than rail tours. Because of these advantages, the coach is a means of transport particularly gladly chosen in certain segments of tourist demand" (Konieczna-Domańska, 2008, p.61). Coaches are used, first and foremost, in closer relations, particularly in travel connected with skiing (e.g. in the Alps and Dolomites), and partly also during touring excursions (Central and Eastern Europe, Southern Europe).

6.1. The largest road carriers servicing Polish tour operators

Data concerning road carriers and cooperating tour operators are less readily available than those concerning air carriers. It is most frequently the case that our road carriers are small firms, employing just one or several people, and sometimes having just a single coach, and so working without any fixed agreements on cooperation with tour operators.

Table 16 presents information on the 11 largest coach carriers, offering carriage for Polish tour operators, and with an annual turnover of no less than 1.5 million zloties. The largest coach carrier is Sindbad, which besides scheduled international coach carriage, also has an involvement in outward and inward tourism, and in the leasing of coaches (*i.a.* for the Lekier tour operator). Tour operating is in this case an additional activity, as is confirmed by the level of turnover – 1.52 million out of a total of 158.03 million zloties. Employment (405 people) and size of own fleet (95 coaches) and number of leased coaches (21) also leave Sindbad in an exceptional position (see also Box 33). The remaining ten coach carriers have markedly smaller fleets and employ fewer workers, despite the fact that some engage in a wide profile of relevant activities (Table 16).

Some carriers' activities are limited to the leasing of coaches (as with Bomatur, Trans Bis and Delta Travel Transport), while others organise own tourist events

Table 16. The largest road carriers servicing Polish tour operators (as of 31 December 2012)

Carrier	Seat	Type of activity	Ownership/legal form	Year of establishment	Annual turnover (M zloties)	Number of employees	Transport means used	Fleet (total)	Tour operators in Poland served	Remarks
Prywatne Biuro Podróży Sindbad	Opole	scheduled coach international carriages, outward & inward tourism, leasing of coaches	private/single-personality activity	1983	158.03	405	coaches	95 + 21 (leasing)	Lekier	1.52 M zloties turnover from tour operating
Bomatur	Czechowice-Dziedzice	leasing of coaches	private/partnership	2006	18.39	11	coaches	40	Rainbow Tours	2 owners: Bogusław & Danuta Matlak's
BUT Żak Tourist	Augustów	organisation of tourist events, leasing of coaches, scheduled coach carriages	private/limited liability company	1998	2.83	30	coaches, microbuses	22 coaches, 6 microbuses	service of 'feeder' lines for Itaka	2 main shareholders
BP Tour[a]	Bełżyce	leasing of coaches, scheduled coach carriages	private/single-personality activity	2002	5.0	30	coaches, microbuses	13 coaches, 14 microbuses	service of 'feeder' lines for Itaka	[a]full name: BP Tour Przedsiębiorstwo Wielobranżowe Piotr Brewczak
Tramp	Czechowice-Dziedzice	scheduled coach carriages, leasing of coaches	private/limited liability company	2004	5.03	19	coaches	16	Itaka, Rainbow Tours, Omnia, Comfort Lines, Eurolines, Tramp-Travel	4 shareholders
Przedsiębiorstwo Transportowo-Spedycyjne Trans Bis	Myszków	leasing of coaches	private/partnership	1998	2.5	20	coaches	13	Rainbow Tours, BP Olimp, Jafsport, Espace Trans, Euro Ray Incoming	2 owners: Jolanta & Marcin Stelmach's

Turystyczny Przewóz Osób Stanisław Pastuszak	Cracow	leasing of coaches	private/ single-personality activity	1998	2.5	20	coaches, micro-buses	11 coaches, 2 micro-buses	Ecco Holiday, Jan-Pol Incoming, GTI Travel Polska, BP Olimp, Daasab Travel	ownership of a single person
Delta Travel Transport	Cracow	leasing of coaches	private/ limited liability company	2007	3.53	10	coaches	7	CT Poland, Jan-Pol Incoming, Solo Tours, Intercarc, Delta Travel	2 shareholders
Hubertus Biuro Usług Turystycznych Tomasz Widziński	Wągrowiec	organisation & sale of tourist events, leasing of coaches	private/ single-personality activity	1991	2.0	10	coaches	5 coaches, 1 microbus	Itaka	ownership of a single person
Podlasie Express	Białystok	scheduled coach carriages	private/ limited liability company	2004	no data	no data	coaches, micro-buses	no data	service of 'feeder' lines for Itaka	first limited liability company, since 2013 – 2 owners
Przedsiębiorstwo Przewozów Pasażerskich SBS Euro-transport Wojciech Jerzy Deptalski	Szczecin	transfers to Berlin Airport, leasing of coaches	private/ single-personality activity	2005	no data	no data	micro-buses	no data	Atas	ownership of a single person

Authors' own elaboration, mainly on the basis of: (1) catalogues and websites of tour operators; (2) websites of carriers; (3) www.infoveriti.pl.

in addition (BUT Żak Tourist, Hubertus), engage in scheduled coach carriage (Żak Express, BP Tour, Podlasie Express), or provide transfers to airports, even foreign ones (SBS Eurotransport). As can already be seen, some coach carriers providing services for the largest Polish tour operators also offer tourist services under own brands, either by way of brokerage as regards someone's else events, or by organising events of their own (e.g. excursions for schools or factories).

All road carriers are private companies, and when legal form is taken into account, they are found to be single-personality businesses (Sindbad, BP Tour, Hubertus and SBS Eurotransport) or limited liability companies (BUT Żak Tourist, Tramp, Delta Travel Transport and Podlasie Express). Only some are in the form of partnerships (Bomatur and Trans Bis). However, even firms that engage in single-personality economic activity possess quite large fleets of vehicles, sometimes built up over many years.

Carriers usually employ from 10 to 30 workers (an exception is the aforementioned Sindbad), while fleets mostly consist of several up to 40 vehicles (again an exception is Sindbad). A portion of coach carriers cooperate constantly with selected tour operators, but this is rather a minority of cases, as has been mentioned before. The seats of the largest coach carriers are spread throughout Poland, with a slight concentration in the southern part of the country. In the case of Cracow-based tour operators, one can in any case observe the tendency to use local coach carriers.

6.2. Tour operators with own and leased coach stock

There is no precise information on cooperation between tour operators and individual coach carriers. Only some tour operators provide such information on their websites. It may indicate a lack of long-term agreements on cooperation, with carriers being selected on an *ad hoc* basis, in line with actual needs.

Table 2 (p. 20) details carriers cooperating with individual tour operators. It can be concluded that some tour operators have a fleet of coaches at their own disposal to transport own customers and possibly also those of competitors. Thus, some tour operators use own coaches only, for example the Jan Pol Incoming Tour Operator, Mazurkas Travel, Funclub, Atas and Skarpa Travel. To a large extent these are tour operators engaged in incoming tourism. Moreover, an own fleet is characteristic for tour operators with capital of Polish origin only. The largest tour operators with foreign capital (*i.a.* TUI Poland, Wezyr Holidays, Neckermann Polska, Sun & Fun Holidays and Oasis Tours) or with 'mixed' Polish and foreign capital (e.g. Viva Club Polska, Best Reisen Group) as a rule do not have their own park of coaches, though in their offer it is possible to find events associated with tourists' own access (ski-tours, typical Summer holidays).

Some tour operators (e.g. Itaka, Rainbow Tours, Centrum Turystyki Oskar, Almatur Opole, Lekier, Sigma Travel) own a fleet of coaches, but also use leased vehicles. Therefore, they try to have a certain flexibility allowing them to react properly to possible changes in demand for carriages, without a necessity of maintaining a large fleet of vehicles.

In the case of a group of companies such as Almatur, for example, one can note the usage of vehicles of other entities that nevertheless belong to the same group. So, Almatur Polska *i.a.* uses the coaches of Almatur Opole and Almatur Częstochowa.

6.3. Carriers serving feeder lines and destinations

Because of growing competition and to achieve better spatial penetration of the market, some tour operators are introducing so-called 'feeder' bus lines. These are conceived as allowing access for tourists inhabiting smaller localities, away from the largest urban centres, to reach the hubs in the form of the larger towns, cities and/or airports. The authors have detailed information on 'feeder' line services run on behalf of three of the tour operators, i.e. Itaka, Rainbow Tours and Centrum Turystyki Oskar.

The largest tour operator (Itaka) uses scheduled private coaches to transport tourists to hubs. Travellers from Lublin, Radom and Kielce are transported to the city of Cracow by BP Tour microbuses and coaches. In similar vein, tourist from north-eastern Poland (up to the city of Suwałki) are carried to Warsaw by vehicles of the Żak Express company. Customers in Białystok are taken to Warsaw Chopin Airport by Podlasie Express microbuses and coaches. Once the tourist event has terminated, travellers depart back to their places of origin. In turn, main routes are served by Itaka (Figure 26, Box 1). Tourists can start and finish their events at localities along the route and at border crossing points, too. In this way, Itaka penetrates a large portion of Poland's territory. Own instances are served by Itaka's coaches or leased from other companies, i.e. Hubertus of Wągrowiec or Tramp of Czechowice-Dziedzice.

Rainbow Tours in practice penetrate the whole of Poland, a majority of connections being served by its own fleet of vehicles or cooperating carriers, *i.a.* the companies Transbis of Myszków and Bomatur of Czechowice-Dziedzice. Carriage is of an organised nature and follows a time-table. Participants of events at hubs change their vehicles for coaches continuing the journey to the destination or are transported to the airports. Three main routes are supplemented by 'feeder' lines (Figure 27, Box 3). Access to hubs and/or change points is provided by coaches, microbuses and even cars.

Centrum Turystyki Oskar is medium-size tour operator with 9 coaches at its own disposal. It is mainly thanks to these coaches that servicing of lines leading form the cities of Poznań and Warsaw to south and south-western Europe (mainly Croatia, Greece and Bulgaria) take place. The network of 'feeder' lines is well developed, though it neglects eastern Poland, with the exception of the city of Lublin (Figure 28, Box 12).

At the destination, tour operators use the services of local carriers, basically for two purposes: (1) transfers from airports to hotels and back; and (2) the servicing of facultative excursions prepared in cooperation with local agencies. In each country the situation may be different: sometimes it is a branch of an international holding that is involved, though more frequently a local travel agency. In the case of an excursion being accomplished by a coach carrying tourist from/to Poland, it is then this vehicle that is used for movement within the destination area.

6.4. Characteristics of more important road carriers: case studies

To better describe selected larger Polish road carriers, information about five of them is provided below. Among these there are 'multibranch' and specialist companies, involved only in carriage activity on behalf of the Polish tour operators (Boxes 33-37).

BOX 33 – SINDBAD: coach carrier & tour operator
Private BP Sindbad – Ryszard Wójcik of Opole (hereinafter abbreviated as Sindbad) has been in existence since 1983. It has a character different from that of other companies, in that tour operating is only a small fragment of its activity. A basic segment is in turn the provision of a service of scheduled bus routes to over 20 countries in Europe. Within the framework of its tourist activity, the company organises school excursions, outward and inward tourism, trips to tourist events, and also the booking of hotels and sale of air tickets. If numbers of passengers served are taken into account, this left Sindbad as the unquestioned leader in 2011. However, among the 841,000 customers served, only 2000 participate in tourist transactions. Additionally, when turnover is taken into account, just 1.52 million zloties comes from tour-operating activity, while the total turnover is of 158.03 million zloties (2011). In total, the company employs 405 workers, while cooperating with some 1980 external agents. Sindbad's fleet consists of 95 owned and 21 leased luxury Setra coaches, while it also serves as a so-called 'carriage platform' focusing other coach carriers under the common brand of Sindbad. The platform is composed of Sindbad Opole, Albatros Przemyśl, Janosik Rzeszów, Riviera Opole, Star Tourist Olsztyn, Nord Gdynia, Trans-Expres Ełk, Touring Sofia and East-West Eurolines Lwów. Amongst tour operators analysed in the book, Lekier of Warsaw uses Sindbad coaches.

In 2010, the Orbis tour operator went bankrupt, with the result that its affiliate Orbis Transport also ceased activity. From the latter, Sindbad took over a right to use INTERBUS brand, and continues Orbis' connections. In the same year, a right for name and fulfiling of an offer was taken over from Gdynia-based company called Nord.

Sources:
(1) *Touroperatorzy Raport 2012*; (2) www.sindbad.pl (04.12.2013).

BOX 34 – BOMATUR
The Bomatur coach carrier is a partnership set up by Bogusław and Danuta Matlak's of Czechowice-Dziedzice. The company was created as a family firm in 1978, and since 2006 has been operating in its present legal form. This company specialises in the leasing of coaches, and has about 40 such vehicles at its disposal. Bonatur's services are provided *i.a.* for the Rainbow Tours tour operator.

Sources:
(1) www.bomatur.com.pl (7.03.2013, 10.02.2014);
(2) www.infoveriti.pl (7.03.2013).

BOX 35 – ŻAK TOURIST
One of the carriers serving 'feeder' lines is Żak Tourist of Augustów. The firm has existed since 1998 (at present as a limited liability company), engaging in the activity of organising tourist events, leasing coaches and providing scheduled coach carriage. This wholly-Polish company possesses about 22 coaches and six microbuses. These vehicles (under the brand name of Żak Express) provide transport along a 'feeder' line from the city of Suwałki via Augustów, Ełk and Łomża to Warsaw, on behalf of the Itaka tour operator.

Sources:
(1) www.zakexpress.com.pl (7.03.2013, 11.02.2014);
(2) www.infoveriti.pl (7.03.2013).

BOX 36 – BP TOUR
BP Tour provides 'feeder' scheduled carriage for the Itaka tour operator on a route between the cities of Lublin and Cracow. The company has been in existence since 2002 and is a single-personality economic activity (belonging to Piotr Brewczak), registered at Bełżyce near Lublin. Its activity encompasses the leasing of coaches and scheduled coach carriage. Its fleet consists of about 13 coaches and 14 minibuses. Besides the aforementioned route, BP Tour also provides carriage on routes linking the city of Lublin with towns in its region (*i.a.* Parczew, Biała Podlaska and Krasnystaw). Also offered are tours on the Warszawa-Dęblin and Lublin-Częstochowa routes, plus typical long-distance travel like the journeys between Lublin and Zakopane and Lublin and Gdynia (in Summer also to Władysławowo, which is also on the Baltic coast).

Sources:
(1) www.bptour.pl (7.03.2013, 11.02.2014); (2) www.infoveriti.pl (7.03.2013).

BOX 37 – TRAMP
Tramp company of Czechowice-Dziedzice owns about 16 coaches, including four luxury ones. Present on the Polish market since 1991, its start-up was with a single vehicle providing carriage along the local Czechowice-Dziedzice–Dankowice route. Since 2004, this has been a limited liability company wholly belonging to the citizens of Poland. The subject of its activity are scheduled coach carriage and the leasing of coaches. Tramp provides services for large tour operators (Itaka and Rainbow Tours), but also for such smaller ones as Tramp-Travel and Omnia. Also organised by the firm is international carriage within the Eurolines network, as well as commutes to work in the case of employees of Fiat's factory in Poland.

Sources:
(1) www.trampczechowice.pl (7.03.2013, 10.02.2014);
(2) www.infoveriti.pl (7.03.2013).

7. OTHER CARRIERS SERVICING POLISH TOUR OPERATORS

The remaining means of transport are used only occasionally by the largest 38 tour operators. Only some of these provide information on the usage of other means of transport besides aeroplanes and/or coaches during organised tourist instances.

7.1. Cruise liners and ferries

Although the global role of cruising is as yet relatively limited (with just 2.1% of all tourists taking cruises in different parts of the world), the average coverage of tourists on cruise liners is nearly 100%. Moreover, maritime cruising is the segment of tourism showing the greatest relative increase in numbers of customers. The greatest role is played by the Caribbean Sea with the Gulf of Mexico, followed by the Mediterranean and adjacent seas.

In Poland, maritime tourism can not be qualified by the adjective 'mass', though it is a fast-developing segment of the market, and certain offers are to be found amongst selected tour operators. The Group of Atlas Tours, besides charter aeroplanes, makes reference to luxury ships, with these being virtually self-contained mega-leisure centres. When it comes to cruising excursions, Atlas Tours offers help with the organisation of individual and group travel, including in the context of team building, but also offers packages that entail cruising, as well as the journey to/from the seaport(s) of embarkation and disembarkation by coach or plane. Tour operator cooperates with cruise lines, such as MSC Cruises, Norwegian Cruise Line, Royal Caribbean International and Costa Cruises. Cruises for groups organised by MSC Cruises are located in several regions, above all in the Mediterranean and Black Seas, the Baltic Sea and to Scandinavian countries. The Norwegian Cruise Line sails around North America (Alaska, Canada and the Sawyer Glacier), Central and South America (Colombia, Costa Rica, Mexico, the Virgin Islands, Aruba and Curacao). Royal Caribbean International sails in Central American waters (to Haiti, Jamaica and Mexico). Costa Cruises sails in East Asia (from Shanghai to Singapore via Okinawa, Hong Kong, Sanya and Da Nang). It is usual for a voyage to take between several and a dozen or so days. On shorter excursions one day is usually provided for individual sightseeing of port cities, while the move to the next seaport takes place at night. On longer voyages, cruising without entering ports takes several days. An offer of an individual voyage covers just the sale of the trip, mainly to the Mediterranean and North Europe, less so to exotic destinations such as Hawaii, Florida, The Bahamas, or the Caribbean Sea.

Sigma Travel, besides scheduled aeroplanes and coaches, presents sea ferries as a means of transport used, especially for transfers between localities. The tour operator uses ferries in multi-day excursions, for example in covering the route between Macau and Hong Kong, on Miyama Island in Japan (return by cable car), on Bali, on the Isle of Skye, on Lake Constance, in transfers from Europe to Morocco, on the Baltic Sea (routes Gdańsk-Nynashamn and Rostock-Gedser), in Eisfiord. Some connections entail long-distance transfers, while those of a local nature are in a minority. Tour operators usually use scheduled ferry links.

Scheduled ferries are also used by Itaka, *i.a.* during coach excursions. An example can be provided by sailings from Tallin to Helsinki, around the Canary Islands archipelago and on the Croatian coast. Ferries are also used for short excursions from the place of accommodation (e.g. from Italy to the nearby islands), or during facultative journeys.

Rainbow Tours has ferries and cruises as means of transport used. Scheduled ferries on the Baltic Sea are used (e.g. on the Świnoujście-Ystad route (shipowner Unity Line), between Oslo and Copenhagen (DFDS) and between Turku and Stockholm. The latter route is sailed by the large Silja Europa ferry, belonging to the Tallink shipowner. On other short routes (e.g. in Italy to close islands, on Skye, via the English Channel) local ferries are used, quite often without cabins. Rainbow Tours also uses liners of the Cyprus shipowner Louis Cruises for four days' cruising between Greek seaports, starting and terminating in Piraeus port.

TUI Poland offers excursions on the 'Leonardo' and 'Otac Nicola' sailing ships (Croatia), as well as sailing down the Nile, usually on the liner 'Helio'. Moreover, tourists can enjoy the diverse offer of TUI Deutschland, encompassing sightseeing on board luxury liners sailing in the Mediterranean or the Caribbean, around Hawaii or The Bahamas, and in South America, Asia, Africa, the Norwegian fiords or the Baltic capitals.

7.2. Railways

A railway, being simultaneously a tourist attraction, can also in its own right serve as a tourist good and main motivation for a journey. Today's boards of many railways cooperate with selected tour operators to organise excursions for larger tourist groups. In Switzerland, Austria, Germany, the UK, Ireland, and even Hungary, the railway has thus become a tourist product. A journey in a comfortable train with large windows, equipped with a restaurant car with national cuisine, can represent a leading attraction in a given country. Some agencies organise several-day rail tours in such a way that a tourist may visit several countries (as for example with the Orient Express). A fine example of railway usage is Switzerland, in which a tourist network called SchweizMobil was created in 2008 (Załuska, 2010), for group and individual tourism. Railtours Ireland in association with Iarnród Éireann (Irish Rail) also organise daily one-day or several-day tours by rail and coach from Dublin to the most attractive parts of Ireland.

Despite all this, railways are also used as means of transport by our tour operators very seldom, and rather abroad than in Poland. Scheduled trains feature in the offer from Itaka (the TGV for a transfer from the city of Nice to Cannes, the Trans-Siberian Railway from Irkutsk to Listwinka, and the Shinkansen on the Fukuoka-Hiroshima route). Also high-speed and classic railways are used in China, as are heritage steam railways in India. Rainbow Tours, in sending coach excursions from the Continent to the UK (besides ferries) also offers trains via Eurotunnel. Overnight transfers by scheduled trains are in the excursion offer of Alfa Star (on the Aswân-Giza tour) and TUI (Aswân-Cairo). The latter journey has also been in the offer of the now-bankrupt Triada. In China, on the Beijing-X'ian route an overnight journey is on offer from TUI.

Some tour operators (e.g. TUI Poland) that make use of foreign airports provide their customers with free tickets for train access to any airport in Germany in the context of a service called rail&fly. It is not important which is the departure airport, since the journey to the airport is offered to tourists free. This is also true of the transfer from railway station to airport. All this is on the basis of an agreement between TUI and Deutsche Bundesbahn, 12 local rail carriers (*i.a.* Regional Bahn, Stadt Express, Regional Express, S-Bahn) and the VDV Union of Regional Carriers (U-Bahn, buses and trams taken together). Together with travel documents, customers receive a rail ticket valid for 48 hours before and after the tour. Such a solution is particularly advantageous for inhabitants of western Poland who live closer to Berlin or Dresden than to Warsaw.

While abroad, places of destination sometimes operate Lilliputian trains with electric (battery) propulsion as local means of transport. Examples are provided by trains along the northern coast of Crete or among the Plitvice Lakes in Croatia. However, information on such means of transport is not usually given in tour operator offers.

7.3. Transport means unused by tour operators searched

Railways, besides their utilitarian function which is to carry schedule traffic of trains used in tourism, can serve in the capacity of primary or supplementary tourist attraction. In Poland, despite the existence of 37 tourist railways, including 28 entities carrying traffic on narrow-gauge lines, rail tourism is a relatively new phenomenon, and not therefore very common (Bebenow, 2012). A great role in their popularisation is played by associations of railway enthusiasts (railway fans, German: *Eisenbahnfreunde*, Polish: *miłośnicy kolei*), organising numerous events and meetings, and above all revitalising former rail routes. The tourist potential of the Polish regional railways is not utilised[13], despite the existence of various projects for their exploitation in different regions, for example in Lower Silesia, the Carpathian Mountains, Wielkopolska and Pomerania (Bebenow, 2012; Lewandowski, 2013) and the Białowieża Primaeval Forest (Załuska, 2010). The most common form of response to tourist needs is to make heritage railways available for visitors, while usage of rail as a means of transport is frequently connected with a necessity to revitalise railways.

[13] So it is in Germany for example, where tourist agencies such as IGE-Bahntouristik organise tours in heritage railways (e.g. with steam locomotives) on generally available rail infrastructure. In Poland, scheduled steam trains are left only at the Wolsztyn steam locomotive shed.

CONCLUSIONS

The servicing of tourist traffic as regards transport is comprehensive and complicated. Full meeting of needs is a necessary condition if tourism is to function and develop correctly. Transport for tourism embraces various modes, fulfills different functions, participates in many different spatial relationships and has a varied ownership structure. Transport can serve tourist traffic exclusively (via charter planes, coaches, cruise liners or heritage railways), partly (via scheduled planes, long-distance and local trains, ferries, express buses, taxis, rented cars, motorcycles or bicycles), occasionally (via private cars and local public transport in seasonal traffic), or rarely (via private and public means of transport, usually used in the commute to work). The tourist function may be visible (in the case of charter flights, coaches and cruises) or may be anonymous (where use is made of rented cars, private cars, motorcycles or bicycles). However, the serving of mass tourism – the subject of this book – entails traffic using only certain of the theoretically possible modes and means of transport.

A thorough analysis was carried out in regard to the information assembled in the authors' databases, as this concerns the 38 largest Polish tour operators, as well as the c. 50 air carriers cooperating with them, and the coach operators. Thanks to this analysis, it has *inter alia* proved possible to put forward the generalisations and regularities detailed in the following points.

1. A hierarchy of the largest tour operators and the largest air and road carriers has been created during the analysis. By and large, where the turnover of a tour operator is greater, so also is the number of cooperating carriers, and the variety of means of transport being used. However, the largest tour operators first and foremost utilise aeroplanes and/or coaches. Other means of transport, such as cruise liners, sea ferries, or railways, are used only occasionally, if at all, despite the enormous potential for their usage in mass organised tourist traffic.
2. Information on the tour operators and their various carriers confirms the extreme price–sensitivity of the Polish tourist market, and thus accounts for the great popularity of the cheapest carriers coming on to the market and seeking to draw immediate attention with their lower fares.
3. Statistically significant linear regression models have been established for the relationships: (1) between turnover resulting from the organisation of tourist events and the number of customers of individual tour operators; and (2) between the numbers of passengers taken by individual charter air car-

riers and the numbers of participants of tourist instances organised by the Polish tour operators. The other linear regression models computed, despite manifesting obvious dependencies, did not manage to achieve statistical significance.

4. In 2012, the tour operators analysed mainly made use of the services of some 50 air carriers, even if the potential list is much longer. The number of registered charter carriers alone is 126, but collaboration with a large number has been on an occasional basis at best. It is apparently usual for carrier companies to hail from Europe or the Mediterranean basin area, though in not all cases (especially in scheduled traffic) could the airlines cooperating with individual tour operators be confirmed. Of much greater credibility is the information on cooperation between tour operators and charter air carriers.
5. In Poland, there are five registered air carriers that are in the service of our tour operators, including four ‘native’ companies (LOT Polish Airlines with its affiliate EuroLOT, Enter Air, Bingo Airways and SprintAir, not to mention YES Airways incorporated by OLT Express Poland, which together with OLT Express Regional went bankrupt in mid-2012), plus one company that is an affiliate of the Czech scheduled and charter Travel Service a.s. operator (Travel Service Polska). However, the share of carriage accounted for by the Polish operators is disproportionately larger: at 34.56% among scheduled airlines, and 61.82% among the charter lines.
6. The largest air carrier serving Polish tour operators is LOT Polish Airlines, which provides regular (scheduled) and charter flights. Other home carriers in practice limit their activities to charter flights. The largest of these is Enter Air, with its fleet of 12 passenger aircraft. The remaining companies play a much more limited role, with fleets not exceeding 5 aeroplanes.
7. Polish air carriers other than LOT Polish Airlines are wholly privately-owned. LOT is a company with a long tradition, but the majority of Poland’s private charter carriers have only recently been present on the market. Moreover, the segment of charter carriers is seen to be under continuous transformation.
8. Large international tour operators (e.g. Neckermann Polska of the Thomas Cook Group) have their own airlines (Thomas Cook Airlines, Condor Airlines, etc.). They use them in achieving their own objectives, but also make them available to competing tour operators. Sometimes they own, not only an air carrier, but also shares in other transport companies (capital links).
9. On the Polish market we also observe airlines belonging to tour operators that are not directly engaged more widely in other activity (e.g. Globalia Tourism, Gropo Iberostar and Balkan Holiday).
10. The Polish tour operators requiring charter flights mainly utilize domestic carriers, as well as one or two significant ones from neighbouring countries (the Czech Republic and Lithuania). Moreover, it is quite common for use to be made of air carriers in receiving countries (Turkey, Tunisia, Egypt, Israel, Greece and Bulgaria). Beyond Europe and the Mediterranean basin, the only significant charter carrier is the low-cost Air Arabia seated in the United Arab Emirates.
11. There are also charter flights of the LCCs (Turkish Corendon Airlines and Onur Air, and the already-mentioned Air Arabia), but this not a frequent phenomenon. At least some scheduled low-costs take part on a limited scale in the servicing of organised tourist traffic (e.g. Wizz Air, easyJet and Norwegian Air Shuttle), this reflecting their servicing of other segments of the market. Moreover, they fly mainly in an east-west direction (Dobruszkes, 2009), and

not north-south, as the orientation along which the demand for mass tourist flights is greatest.

12. In the case of more specialised and less 'mass' types of tourism, a quite common practice is the utilisation of scheduled airlines. The carrier is then adjusted to the size of group on the basis of actually available seats within a booking system.
13. In coach transport, three types of activities can be distinguished: tourist travel on 'feeder' lines from smaller localities to hubs using scheduled coaches (sometimes microbuses and cars), carriage of small groups by scheduled coaches, and the usage (sometimes charter) of whole coaches by tour operators (also at destinations).
14. Some of the tour operators researched have their own coaches at their disposal (e.g. Jan Pol Incoming Tour Operator, Mazurkas Travel, Funclub, Atas and Skarpa Travel). These are put to use in both own carriage and that of the competition. In the case of groups of companies such as Almatur, tour operators not having their own stock use coaches of other members of their group. Own means of transport, if they are available, are limited to coaches only, and not air carriers. The latter, in turn, is a domain of larger tour operators with foreign capital (like TUI and Neckermann).
15. Tour operators involved in inward tourism usually have their own fleet of coaches (e.g. Jan Pol Incoming Tour Operator and Mazurkas Travel). Possession of an own fleet of coaches is characteristic for tour operators with exclusively Polish capital. The largest tour operators with foreign and 'mixed' Polish-foreign capital as a rule do not own coaches.
16. There is no precise information available on cooperation of the Polish tour operators with individual coach carriers. Only a few tour operators provide such information on their websites. This may point to a lack of long-term agreements on cooperation, with carriers being chosen *ad hoc*, in line with the needs of the given time.
17. Some coach carriers (e.g. Żak Express and Hubertus) rendering services for the largest Polish tour operators, also engage in tourist services under their own brand name, selling someone's else events, or organising their own instances (e.g. school excursions, excursions for factories).
18. A characteristic feature of the coach carriers analysed is the legal form of single-personality economic activity, or partnership. Nonetheless, even such firms have a quite substantial number of coaches.
19. It is of interest that a majority of the coach carriers analysed have their seats in southern Poland. In the case of the Cracow-based tour operators, it is possible to note the use of local coach carriers.
20. Coaches are used mainly in closer relations, especially in ski-events (e.g. in the Alps or Dolomites), and partly also during round tours within a sightseeing programme (e.g. in Central and Eastern Europe or Southern Europe).

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APPENDIX: QUANTITATIVE CHARACTERISTICS OF TOUR OPERATORS

Table A1. Tour operators by year of establishment

Year	Tour operators		Turnover		Customers		Employees	
	Number	**%**	**M zloties**	**%**	**Number**	**%**	**Number**	**%**
Before 1991	9	23.68	1 761.739	41.07	838,068	39.43	939	43.43
1991-1995	6	15.79	422.647	9.85	286,660	13.49	269	12.44
1996-2000	10	26.32	1 506.175	35.11	683,229	32.15	668	30.90
2001-2005	9	23.68	397.757	9.27	229,533	10.80	225	10.41
2006-2010	3	7.89	185.991	4.34	78,770	3.71	50	2.31
After 2010	1	2.64	15.000	0.36	9, 000	0.42	11	0.36
Total	38	100.00	4 289.309	100.00	2,125,260	100.00	2,162	100.00

Table A2. Tour operators by type of tourism offered

Type of tourism	Tour operators		Turnover		Customers		Employees	
	Number	**%**	**M zloties**	**%**	**Number**	**%**	**Number**	**%**
Foreign outward	25	65.79	3 759.948	87.66	1,705,684	80.26	1,501	69.43
Foreign inward	3	7.89	68.814	1.60	76,200	3.58	45	2.08
Mixed	10	26.32	460.547	10.74	343,376	16.16	616	28.49
Total	38	100.00	4 289.309	100.00	2,125,260	100.00	2,162	100.00

Table A3. Tour operators by legal form

Legal form	Tour operators		Turnover		Customers		Employees	
	Number	%	M zloties	%	Number	%	Number	%
Joint-stock company	3	7.89	651.822	15.20	288,716	13.58	380	17.58
Limited liability company	32	84.21	3 402.398	79.32	1,683,384	79.22	1,669	77.20
Partnership	2	5.26	221.069	5.15	141,160	6.64	110	5.08
Single-personality economic activity	1	2.64	14.020	0.33	12,000	0.56	3	0.14
Total	38	100.00	4 289.309	100.00	2,125,260	100.00	2,162	100.00

Table A4. Tour operators by means of transport used

Transport means	Tour operators		Turnover		Customers		Employees	
	Number	%	M zloties	%	Number	%	Number	%
Aeroplanes	15	39.47	2 043.910	47.65	971,995	45.73	901	41.67
Coaches	6	15.79	135.410	3.16	183,130	8.62	319	14.75
Various means	16	42.10	2 095.179	48.84	942,135	44.33	927	42.88
No data	1	2.64	14.810	0.35	28,000	1.32	15	0.70
Total	38	100.00	4 289.309	100.00	2,125,260	100.00	2,162	100.00

Table A5. Tour operators by country of origin of capital

Country of origin of capital	Tour operators		Turnover		Customers		Employees	
	Number	%	M zloties	%	Number	%	Number	%
Poland	26	68.42	2 437.177	56.82	1,279,706	60.20	1,430	66.13
Germany	2	5.26	883.722	20.60	343,633	16.17	230	10.64
Tunisia	2	5.26	349.725	8.15	178,000	8.38	140	6.48
Turkey	2	5.26	79.310	1.85	39,000	1.84	30	1.39
Israel	1	2.64	19.744	0.47	8,500	0.40	9	0.42
Various countries	5	13.16	519.631	12.11	276,421	13.01	323	14.94
Total	38	100.00	4 289.309	100.00	2,125,260	100.00	2,162	100.00

Table A6. Means of transport used by tour operators by locations of their seats (as percentages)

Seat	Turnover (100%)			Customers (100%)			Employees (100%)		
	Aeroplanes	Coaches	Various means	Aeroplanes	Coaches	Various means	Aeroplanes	Coaches	Various means
Chorzów	100.00	-	-	100.00	-	-	100.00	-	-
Cracow	-	-	100.00	-	-	100.00	-	-	100.00
Józefów	-	-	100.00	-	-	100.00	-	-	100.00
Katowice	-	75.15	24.85	-	76.44	23.56	-	75.44	24.56
Łódź	-	-	100.00	-	-	100.00	-	-	100.00
Opole	-	-	100.00	-	-	100.00	-	-	100.00
Poznań	80.34	19.66	-	64.61	35.39	-	67.66	32.34	-
Radom	100.00	-	-	100.00	-	-	100.00	-	-
Skierniewice	-	-	100.00	-	-	100.00	-	-	100.00
Warsaw[a]	79.38	1.38	18.51	71.75	8.15	17.35	58.95	17.54	22.19
Żory	-	-	100.00	-	-	100.00	-	-	100.00

[a] In the case of the city of Warsaw certain data are missing: 0.73% of turnover, 2.75% of customers, and 1.32% of employees.

LIST OF TABLES

Appendix: Quantitative characteristics of tour operators

LIST OF FIGURES

PRZEDSIĘBIORSTWA TRANSPORTOWE W OBSŁUDZE ZORGANIZOWANEGO RUCHU TURYSTYCZNEGO W POLSCE [POLISH CONCLUSIONS]

Obsługa transportowa ruchu turystycznego jest dość złożona i skomplikowana. Pełne zaspokojenie potrzeb w zakresie przewozów jest nieodzownym warunkiem prawidłowego funkcjonowania i rozwoju turystyki. Transport turystyczny obejmuje różne sposoby, pełni rozmaite funkcje, odbywa się w zróżnicowanych relacjach przestrzennych i ma różną strukturę własności. Może służyć ruchowi turystycznemu wyłącznie (samoloty czarterowe, autokary, statki wycieczkowe, koleje zabytkowe), częściowo (samoloty rozkładowe, dalekobieżne i lokalne pociągi, promy, autobusy ekspresowe, taksówki, wynajęte samochody, motocykle, rowery), okazjonalnie (prywatne samochody, lokalny transport publiczny w ruchu sezonowym) lub rzadko (prywatne i publiczne środki transportu, wykorzystywane zazwyczaj w codziennych dojazdach do pracy). Funkcja turystyczna transportu może być widoczna (loty czarterowe, autokary, statki wycieczkowe) lub anonimowa (wynajęte samochody, samochody prywatne, motocykle, rowery). Jednakże, w masowym ruchu turystycznym, wykorzystywane są tylko niektóre sposoby i środki transportu, co było przedmiotem badania.

Dane zebrane w autorskich bazach 38 największych touroperatorów (czyli wyspecjalizowanych przedsiębiorstw zajmujących się kompleksową obsługą turystów i biorących na siebie odpowiedzialność za sprzedawany produkt) oraz współpracujących z nimi przewoźników lotniczych (około 50) i autokarowych poddano wszechstronnej analizie. Pozwoliła ona, między innymi, na wyprowadzenie poniższych uogólnień i prawidłowości.

1. Udało się ustalić hierarchię największych touroperatorów i największych przewoźników lotniczych i autokarowych. Zazwyczaj im obroty touroperatora są większe, tym większa jest liczba współpracujących przewoźników i różnorodność wykorzystywanych środków transportu. Niemniej, najwięksi polscy touroperatorzy korzystają jednak w zasadzie wyłącznie z samolotów i/lub autokarów. Inne środki transportu, takie jak statki morskie, promy, czy kolej, używane są sporadycznie lub wcale, mimo dużych potencjalnych możliwości ich wykorzystania w masowym zorganizowanym ruchu turystycznym.
2. Polski rynek, co podkreślają zarówno touroperatorzy jak i przewoźnicy, jest niesłychanie wrażliwy na cenę. Stąd duża popularność przewoźników najtańszych – takich, którzy wchodzą na rynek i chcą zwrócić uwagę niskimi cenami.
3. Udało się ustalić istotne statystycznie zależności dla dwóch modeli regresji liniowej: (1) między obrotami wynikającymi z organizacji imprez turystycznych a liczbą klientów poszczególnych touroperatorów; oraz (2) między liczbą

pasażerów poszczególnych lotniczych przewoźników czarterowych a liczbą uczestników imprez turystycznych organizowanych przez polskich touroperatorów. Inne obliczone modele regresji liniowej, mimo oczywistych zależności, nie są istotne statystycznie.

4. Badani touroperatorzy korzystali w 2012 r. głównie z około 50 przewoźników lotniczych, chociaż ich lista jest zdecydowanie dłuższa: tylko zarejestrowanych przewoźników czarterowych było ogółem 126, ale z niektórymi współpraca była okazjonalna. Generalnie wśród przewoźników brakuje firm spoza Europy i basenu Morza Śródziemnego. Niestety, nie we wszystkich przypadkach (zwłaszcza przy korzystaniu z przelotów rejsowych) udało się ustalić współpracujące z touroperatorami linie lotnicze. Zdecydowanie bardziej wiarygodne są natomiast informacje na temat współpracy touroperatorów z przewoźnikami czarterowymi.
5. W Polsce zarejestrowanych jest 5 przewoźników lotniczych obsługujących polskich touroperatorów, z tego cztery firmy są rdzennie polskie (Polskie Linie Lotnicze LOT wraz ze spółką zależną EuroLOT, Enter Air, Bingo Airways i SprintAir, nie licząc YES Airways wchłoniętej przez OLT Express Poland, która razem z OLT Express Regional zbankrutowała w połowie 2012 r.), a jedna jest spółką zależną czeskiego operatora regularnego i czarterowego Travel Service a.s. (Travel Service Polska). Udział polskich operatorów w przewozach jest jednak nieproporcjonalnie znacznie większy i wynosi: 34,56% wśród regularnych i 61,82% wśród linii czarterowych.
6. Największym przewoźnikiem lotniczym obsługującym polskich touroperatorów jest PLL LOT, oferujący loty zarówno regularne, jak i czarterowe. Pozostali krajowi przewoźnicy w praktyce ograniczają się do lotów czarterowych. Największym z nich jest Enter Air z flotą 12 samolotów pasażerskich. Pozostali mają mniejsze znaczenie, a ich floty liczą nie więcej niż 5 samolotów.
7. Polscy przewoźnicy lotniczy (poza PLL LOT) są firmami całkowicie prywatnymi. O ile LOT jest firmą z długimi tradycjami, o tyle większość polskich prywatnych przewoźników czarterowych funkcjonuje na rynku od niedawna. Co więcej, segment przewoźników czarterowych podlega stale intensywnym zmianom.
8. Duzi międzynarodowi touroperatorzy (np. Neckermann Polska z Grupy Thomas Cook) posiadają własne linie lotnicze (Thomas Cook Airlines, Condor Airlines, etc.) Wykorzystują je sami, jak również udostępniają flotę konkurencyjnym biurom podróży. Czasem posiadają nie tylko własnego przewoźnika lotniczego, lecz również udziały w innych przedsiębiorstwach przewozowych (powiązania kapitałowe).
9. Na rynku polskim wykorzystywane są ponadto także linie lotnicze touroperatorów nieprowadzących na większą skalę bezpośredniej działalności (np. Globalia Tourism, Gropo Iberostar, Balkan Holiday).
10. Polscy touroperatorzy w lotach czarterowych wykorzystują przede wszystkim polskich przewoźników lub dwóch znaczących operatorów z krajów sąsiednich (z Czech i Litwy). Ponadto, stosunkowo powszechne jest wykorzystywanie przewoźników z krajów recepcyjnych (Turcja, Tunezja, Egipt, Izrael, Grecja, Bułgaria). Spoza Europy i basenu Morza Śródziemnego jedynym liczącym się przewoźnikiem czarterowym jest low-cost Air Arabia ze Zjednoczonych Emiratów Arabskich.
11. Obserwuje się także czartery linii niskokosztowych (tureckie Corendon Airlines i Onur Air, wspomniane już Air Arabia), ale nie jest to częste zjawisko. Przynajmniej niektóre niskokosztowe linie regularne uczestniczą w ograni-

czonym zakresie w obsłudze zorganizowanego ruchu turystycznego (np. Wizz Air, easyJet, Norwegian Air Shuttle), gdyż głównie obsługują inne segmenty rynku. Poza tym latają głównie na kierunku wschód–zachód (Dobruszkes, 2009), a nie z północy na południe, czyli tam gdzie jest największy popyt na masowe przeloty turystyczne.

12. W przypadku bardziej wyspecjalizowanych, a mniej masowych rodzajów turystyki powszechną praktyką jest wykorzystywanie regularnych linii lotniczych. Wówczas przewoźnik jest dopasowywany do wielkości grupy na podstawie aktualnie dostępnych ofert w systemie rezerwacyjnym.
13. W transporcie autokarowym można wyróżnić trzy rodzaje działalności: dowozy ‘antenowe’ regularnymi liniami autokarowymi (czasem mikrobusami i samochodami osobowymi) uczestników wyjazdów z mniejszych miejscowości do *hubów*, przewozy małych grup rejsowymi autokarami i wykorzystywanie (czasem czarterowanie) całych autokarów przez touroperatora (również w miejscu destynacji).
14. Część badanych touroperatorów dysponuje własnym parkiem autokarowym (np. Jan Pol Incoming Tour Operator, Mazurkas Travel, Funclub, Atas, Skarpa Travel), którym realizuje przewozy klientów własnych i konkurencji. W przypadku grup przedsiębiorstw takich jak np. Almatur odnotowuje się wykorzystywanie przez touroperatorów nieposiadających własnego parku autokarów pojazdów innych podmiotów tej samej grupy. Własne środki transportu, o ile takie znajdują się w posiadaniu polskiego touroperatora, ograniczają się do floty autokarów, a nie do posiadania własnego przewoźnika lotniczego. To z kolei jest domeną większych touroperatorów z kapitałem obcym (TUI, Neckermann).
15. Touroperatorzy zajmujący się turystyką przyjazdową dysponują zazwyczaj własnym parkiem autokarowym (np. Jan Pol Incoming Tour Operator, Mazurkas Travel). Własna flota autokarów charakterystyczna jest głównie dla touroperatorów z wyłącznym kapitałem polskim. Najwięksi touroperatorzy z kapitałem obcym i mieszanym polsko-zagranicznym z reguły nie posiadają własnego parku autokarowego.
16. Brakuje precyzyjnych informacji na temat współpracy polskich touroperatorów z konkretnymi przewoźnikami autobusowymi. Tylko kilku touroperatorów podaje takie informacje na swoich stronach internetowych. Może to wskazywać na brak długoterminowych porozumień o współpracy, a przewoźników dobiera się *ad hoc* w zależności od aktualnych potrzeb.
17. Część przewoźników autokarowych świadczących usługi na rzecz największych polskich touroperatorów (np. Żak Express, Hubertus) wykonuje także usługi turystyczne pod własnym szyldem, pośrednicząc w sprzedaży cudzych imprez, a także organizując własne (np. wycieczki szkolne, zakładowe).
18. Charakterystyczną cechą analizowanych przewoźników autokarowych jest własność osób fizycznych w postaci bądź jednoosobowej działalności gospodarczej, bądź też spółek cywilnych lub jawnych. Nawet firmy o kapitale pochodzącym od osób fizycznych dysponują jednak stosunkowo rozbudowanym parkiem pojazdów.
19. Większość badanych przewoźników autokarowych ma swoje siedziby w Polsce Południowej. W przypadku touroperatorów krakowskich obserwuje się wykorzystywanie autokarów miejscowych przewoźników.
20. Autokary wykorzystywane są przede wszystkim w bliższych relacjach, szczególnie przy wyjazdach narciarskich (w Alpy, Dolomity), a częściowo podczas wycieczek objazdowych (np. po Europie Środkowo-Wschodniej, Europie Południowej).

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The subjects of this book are transport companies, Polish as well as foreign, involved in servicing organised (collective) tourist traffic in Poland. Tourist traffic embraces outbound tourism from Poland, inbound from abroad into Poland, and also domestic tourism. Moreover, the research embraces the largest tour operators on the market as of 2012 which are involved in the comprehensive organisation of travel, in that they offer organised package holidays.