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Exploring characteristics of passengers using traditional and low-cost airlines: A case study of Belgrade Airport

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ABSTRACT

Low cost carriers entered the Serbian air travel market after Serbia joined the European Common Aviation Area (ECAA) in 2006, prompting the development of healthy competition among airlines and resulting in significant traffic increase at Belgrade Airport. The aim of this paper is to examine the characteristics of passengers traveling on low-cost carriers (LCC) in comparison with those traveling on traditional airlines by using cluster analysis, and to provide practical implications to airport management in tailoring their strategies to meet growing demand. A comprehensive passenger survey was recently conducted at Belgrade Airport on the routes where competition between traditional and LCC carrier exists. The results reveal that emigrants, primarily encouraged by favorable fares, constitute a substantial portion of LCC passengers. Affordable service offered by LCC has also been a positive stimulus for emigrants, who purchase tickets for their friends and relatives to visit them in their host countries. On the other hand, passengers using traditional airlines could be generally classified into two segments, those who fly on business and those who fly for leisure purposes, and each had specific needs when choosing their airline.

1. Introduction

The aviation market in Europe was liberalized through three legislative “packages”, and culminated in establishing the eighth freedom (also called “consecutive cabotage”) in 1997. As a result of these regulatory changes, European carriers obtained practically unlimited freedom to choose their routes, capacity, and schedules (ELFAA, 2004). Moreover, the liberalized skies were a positive stimulus to so called “low-cost carriers” to penetrate the market and boost the air passenger growth across Europe. Low-cost carriers brought perhaps the most revolutionary changes in the aviation industry over the last 40 years, by adopting the strategy of achieving substantive operational cost savings through maximum utilization of their aircraft and of the work force, developing networks focused on point-to-point routes, offering a single class with no frills services, and taking advantage of various incentive schemes offered by governments (Barbot, 2006; Dennis, 2004; Graham and Vowels, 2006; Hunter, 2006; Pels et al., 2009). This simple consumer product with lower ticket price was particularly appealing to the price-sensitive segments of potential passengers who would not have flown in the absence of LCC services. Franke (2004) and Tretheway (2004) investigated the emergence of LCCs and their competitive advantages over major network carriers. Dobruszkes (2006) found that LCCs represented 18% of the total air transport supply in Western European market in terms of seats and had been creating networks that diverge from the traditional ones, either parallel and competing via secondary airports, or really innovative networks for the niche market.

Pioneered by *Ryanair*, and later *easyJet*, the LCCs services have led to a new landscape of mobility patterns and interactions in the now expanded single European aviation market, which facilitate the movements of millions of people and Euros around Europe (Gössling and Upham, 2009). Dobruszkes (2009) considered the new west-east routes, which stem from the expansion of liberalized skies, reflecting the new forms of mobility, primarily post-migration flows from the East by those who have gone to work in West Europe, new tourist flows and undoubtedly new types of business as well. The densest west-east links are certainly those between Poland and the UK where *Ryanair* has played a significant role in defining the collective dimension of traveling for migration. Despite the fact that many countries of the Western Balkans remained out of the EU, ratification of the Multilateral Agreement on European Common Aviation Area enabled them to experience the positive effect of liberalized market. As it has happened

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elsewhere, LCCs' entry on this market became a serious threat to traditional carriers since they were gradually losing their market share with their passengers diverting to LCC services.

Although there is a sizable body of scholarly literature on differences between LCCs and FSNCs passengers (Chiou and Chen, 2010; Mikulić and Prebežac, 2011), there is generally a lack of relevant research on characteristics and differences of passengers who use FSNCs and LCCs in the Western Balkans. The aim of this paper is to analyze the characteristics of the Serbian air travel market after Serbia joined the ECAA in 2006, the event which introduced LCCs to the Serbian market and increased mobility of Serbian inhabitants. The investigation of passengers' profiles and traffic structures also has practical implications to Belgrade Airport in tailoring their strategies to meet the demand of rapid growth in the number of passengers and the number of LCCs. For this purpose, a comprehensive survey has been recently carried out at Belgrade Airport among passengers on the routes that are served by both LCCs and FSNCs. After a brief overview of Serbian air travel market in Section 2, the data and the methodology are described in Section 3. Section 4 discusses the results that reveal the major segments of passengers for FSNCs (later referred as traditional airlines) and LCCs, with a focus on differences and similarities among them. Finally, concluding remarks are given in Section 5.

2. Socio-economic environment and air transport demand in Serbia

Serbia is situated in the Western Balkans, the region which has been the center of political and ethnic unrest over the last two decades. The breakup of Yugoslavia in 1991, followed by the ethnic war eventually led to the constitution of five independent republics, Serbia and Montenegro, Croatia, Bosnia and Herzegovina, Slovenia, and Macedonia. The air transport sector in Serbia, as in other countries of former Yugoslavia, was highly affected by these events. Although there is a number of airports in Serbia, the main airport is *Nikola Tesla Airport* (BEG) located 12 km west of central Belgrade. There were 22 airlines operating at Nikola Tesla Airport in May 2013, serving 38 non-stop destinations (see the Appendix).

During the political and ethnic unrest period, the number of passengers at Nikola Tesla Airport dropped sharply from 2.8 million in 1990 to only 350 thousand in 1994 (see Fig. 1). At that time, a broad range of problems persisted in the Serbian economy resulting in the sparse demand for air travel: hyperinflation at an unprecedented rate, low income and large proportions of the population living in extreme poverty. Under such circumstances the national flag carrier, *Jat Airways*, struggled to survive, plagued with low productivity and lower quality of services. The number of passengers, which was over 4.5 million in the period of "golden years" (in the late 1980s), fell to less than a million in 1992. Nevertheless, the national carrier retained the dominant market position on the majority of its routes, operating 33 routes out of the 37 routes at Belgrade Airport in 2001.

The economic stabilization which took place after 2000, together with regulatory changes in the aviation sector, became one of the most outstanding events that helped to reinvigorate air transport development. The number of passengers at Belgrade Airport gradually increased from 1.28 million in 2000 to 3.54 million in 2013. In June 2006, the Republic of Serbia (together with other countries in the South East Europe) signed the ECAA agreement with EU to join the European Common Aviation Market by 2010. This entailed the implementation of ambitious reforms within a short timeframe, including the adoption of the aviation-related acquis and comprehensive sector restructuring at the national level (European Commission - World Bank, 2007). It has facilitated the entry of low-cost carriers to the Serbian market through offering a vast number of routes from Belgrade Airport. The first entry was on the Cologne–Belgrade route by *Germanwings* in autumn 2006. North-Rhine Westphalia in the western part of Germany has traditionally been the area where many Serbian emigrants live and thus this route was deemed promising due to the nature of emigrants' migration.

The abolishment of visa requirements for Serbian citizens traveling to the Schengen Area countries in December 2009 swiftly helped Belgrade Airport to attract new airlines. Wizzair, the Hungarian low-cost carrier, was one of those airlines, and has quickly positioned itself as one of the leading foreign airlines at Belgrade Airport. Wizzair offered reasonably lower prices on the routes which connect Belgrade Airport to countries with large number of migrant communities and carried almost half a million passengers in 2013.

As indicated in Fig. 2, the national carrier's market share gradually declined as low-cost carriers achieved this prosperous growth. Adopting the strategy of tracking the migratory patterns, low-cost airlines have further facilitated the intensive migration mobility of the Serbian community. Increasing flow of tourists, mostly foreign visitors, have also contributed to the substantial air traffic growth. Since low-cost carriers have attracted the price-sensitive segments, it is expected that the passenger composition at Belgrade Airport has shifted towards more leisure passengers. Moreover, the low-cost carriers have particularly played an important role for family reunions, seasonal commuters and students who study abroad, triggering the growing demand from those who wish to visit them. It is worth emphasizing that the Serbian economy, as other emerging economies, comprises a large proportion of the population living in poverty, and thus traveling by plane is reasonable only if the ticket price is sufficiently cheaper than the ticket price offered by competitors from other modes of

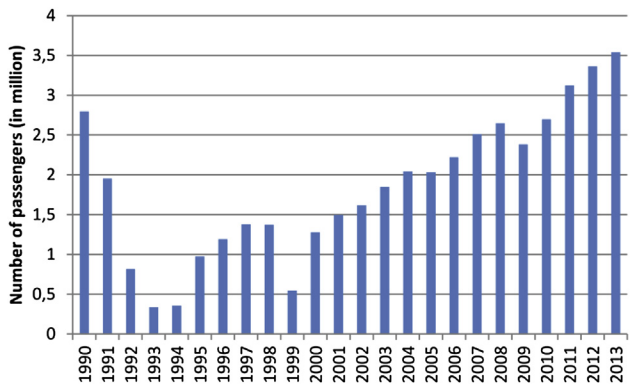

Fig. 1. Total number of passengers at BEG in the period from 1990 to 2013.
Source: compiled by authors from annual reports.

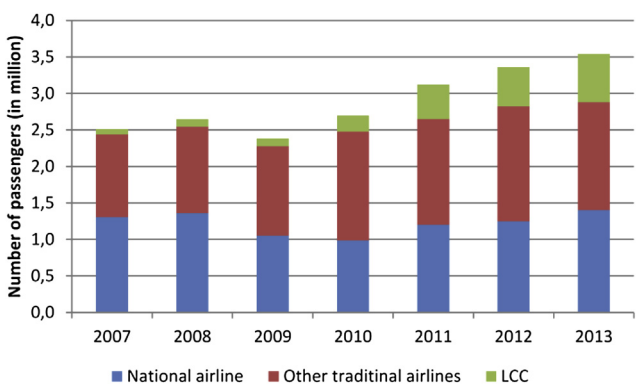

Fig. 2. Number of passengers at Belgrade Airport by type of carriers.
Source: Authors' own database.

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Table 1
Low-cost carriers currently operating from Belgrade Nikola Tesla Airport (2013).

Low-cost carriers	Starting date	Current destinations
Germanwings	September 2006	Stuttgart
Norwegian Air Shuttle	April 2007	Copenhagen, Oslo, Stockholm
Wizzair	April 2010	London (Luton), Gothenburg, Memmingen, Eindhoven, Malmo, Basel, Stockholm, Dortmund, Brussels
FlyDubai	November 2011	Dubai
Pegasus Airlines	February 2013	Istanbul
EasyJet	April 2013	Milan

transportation. Although there is a lack of relevant studies which show the proportion of the demand generated in the Western Balkans (particularly Serbia) by LCCs, ELFAA (2004) found that 59% of passengers traveling with LCCs in Europe represented a newly generated demand by passengers who would not have traveled by air in the absence of LCCs.

Although low-cost carriers benefit significantly from stimulation and generation of new demand, they tend to divert passengers from traditional airlines on competing routes. It is observed that low-−cost airlines at Belgrade Airport have certainly had a substantial impact on the traditional airlines which had to adjust their strategies on specific routes in order to sustain their market position. For example, the cheapest online ticket to Vienna before the arrival of *Niki* was EUR 217 offered by *Jat Airways* and *Austrian Airlines*. The demand for the flights of those two carriers was seriously jeopardized by the lower ticket prices offered by *Niki*. Therefore, *Jat Airways* and *Austrian Airlines* tailored a counter-strategy, offering a special price of EUR 99. Shortly after *Niki* ceased its operations at Belgrade Airport at the beginning of March 2013, *Austrian Airlines*' cheapest ticket to Vienna went up to EUR 150.

Table 1 lists the low-cost carriers currently operating from Belgrade Airport with the destinations they serve. Some of these carriers such as *Niki* left the market after several years of serving Belgrade−Vienna route, while others, such as *Wizzair,* have been constantly increasing their frequency on high density routes and terminating services on low demand routes. *Wizzair* is one of the most successful low-cost airlines in Central and Eastern Europe, allowing migrant workers and their families to move around the European Union with low air fares. *Wizzair* has18 operating basis and Belgrade Airport is one of them with two aircraft which operate daily on several routes mainly in the European Union. *Norwegian Air Shuttle* is the second low-cost carrier at Belgrade Airport connecting the capital with three large Scandinavian cities (Copenhagen, Oslo and Stockholm). *Pegasus*, the largest Turkish LCC and the fastest growing airline in Europe, commenced its operations in February 2013 offering flights from Belgrade Airport to Istanbul's secondary airport, *Sabiha Gokcen*. One of the largest low-cost carriers, *easyJet,* entered the Serbian market in April 2013 by offering flights to Milan. *FlyDubai* is the fastest growing start-up airline that commenced the operation at the end of 2011 offering the service to Dubai.

3. Data and methodology

The Division of Airline Planning and Operations at the Faculty of Transport and Traffic Engineering, University of Belgrade, conducted a survey at Belgrade Airport in April and May 2013. The sample consisted of passengers who traveled on the seven routes where two or more airlines compete and one of them was an LCC, which includes all the routes[1] where traditional and LCC compete against each other (Table 2). Total weekly capacity of all airlines operating to/from Belgrade Airport in the third week of May was 105,107 seats in 2013 (see Appendix). The seven routes in the survey accounted for 10.3% of the weekly capacity in seats (i.e. 10,870 seats), including the flights from Belgrade to Brussels, Copenhagen, Gothenburg, Istanbul, London, Munich and Stuttgart. Table 2 presents some information about the routes surveyed including airlines, weekly flight frequencies, departure times and destination airports. As seen from Table 2, LCCs tend to explore the advantage of using secondary (regional) airports which allow substantial operating cost savings and further the possibility of offering cheaper air fares. Among the seven routes, traditional airlines and LCCs serve the same airport only at Copenhagen and Stuttgart.

Two variations of the same questionnaire were designed. The first was for the passengers traveling by a traditional airline and the second was for the passengers traveling by a low-cost airline. Core to both the questionnaires were 22 questions. Some differences were necessary in several questions distinguishing between traditional and LCC. Face-to-face interviews were conducted in the check-in area and in the transit area in front of the departure gates. Due to security reasons, no access to the gates was granted to the interviewers. The passengers were interviewed randomly embracing all passengers' nationalities. In this way, this ensured that the structure of the sample in terms of nationality reflected the structure of population. A total of 766 responses were collected and used in the analysis.

The questions are grouped into three variable sets. The first is constructed to reveal the socio-economic characteristics of the interviewed passengers (such as gender, age, occupation etc.). The second set contains variables related to the travel itself (type of the airline flown, frequency of flying, purpose of the trip, number of checked bags, number of persons in the group etc.). Finally, the third set includes the variables presenting the preferences regarding different attributes of the airline service which may influence the choice of airline.

A two-step cluster analysis (TSCA) was performed to identify meaningful groups of passengers within those passengers who use traditional and low-cost carriers on competing routes. Unlike other clustering techniques, the two-step cluster analysis can produce solutions based on mixtures of continuous and categorical variables and can be particularly useful for large datasets (Everitt et al., 2011). It also finds the optimal number of clusters. These features were decisive in choosing an appropriate clustering technique, allowing the possibility to combine variables with different scales of measures and hereby giving a chance to reveal underling characteristics of segments. To calculate the distance between clusters, this cluster technique uses both the Euclidian distance and the log-likelihood distance. The Euclidian distance can be used only if all variables are continuous, while log-likelihood distance can be used both for continuous and categorical variables. The variables used in the segmentation process are presented in Table 3. Decision maker, Place of residence and Frequency of flying were used for segmenting the passengers using low-cost airlines, while Purpose of travel, Frequency of flying, Level of education and Ticket price were seen as appropriate variables for clustering the passengers using traditional airlines.

[1] The routes on which carriers started to operate during or after the period of survey (April and May 2013) were excluded from consideration.

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4. Results

The most important socio-demographic characteristics of passengers on traditional and low-cost flights are presented in Table 4. It is noted that the two groups do not significantly differ in terms of gender and age. On the contrary, in terms of permanent place of residence, it is apparent that around 36% of passengers who use LCC services are people from Serbia living abroad (emigrants), whereas only 14% of emigrants use traditional airlines. This finding can be seen as ample evidence that by decreasing price of services and offering new routes, LCCs are able to generate additional demand. The large Serbian community living abroad has experienced substantial benefits from low-cost services that have enabled it to maintain close relations with the home country through affordable air fares. In terms of trip purpose, passengers on traditional airlines are roughly divided into two major groups – those who travel on private, tourist and other purpose (57%) and the rest who travel on business (43%). On the other hand, a vast majority of passengers (86%) flying with low cost carriers are leisure passengers and only minority (14%) use low cost carriers for business purposes.

4.1. Low-cost passenger segments

In order to reveal the salient characteristic of low-cost carriers, four segments of passengers were derived by using the TSCA (Table 5). The silhouette measure of cluster cohesion and separation is .6 indicating a good quality cluster model. The results of the ANOVA analysis indicate that all variables are significantly different across the identified segments (see Table 6). It can be observed that the F-ratios for all the variables are significant at the 5% level as their corresponding p-values are less than .05. Since the cluster analysis is based on the categorical variables selected, Table 5 shows the most dominant category within each segment obtained together with their respective proportion.

All four resulting segments are of approximately equal size, with Segment 1 being the largest among them (Segment 1 included 32.4% of the sample). The first two segments, named “emigrant travellers” contains those passengers which represent Serbian citizens living abroad and who tend to regularly visit their home country. The first segment contains those passengers who travel at least once in three months (high frequency), while the frequency of flying of the second segment includes two or three trips annually (medium frequency). Decision about airline choice in the first two

Table 2
Information about considered routes.

Route from Belgrade to	Airline	Flight frequency per week	Days	Departure time	Destination airport
Istanbul	Turkish Airlines	14	All days	09:15 20:20	Istanbul – IST
	Pegasus	6	All days except Saturday	11:50 12:50 14:10 16:15	Istanbul Sabiha - SAW
Munich	Lufthansa	21	All days	06:50 13:05 16:55	Munich – MUC
	Wizzair	2	Tuesday Saturday	10:50	Memmingen – FMM
Stuttgart	JAT Airways	4	Monday Wednesday Friday Saturday	08:05 17:30 18:10	Stuttgart –STR
	Germanwings		Tuesday Wednesday Thursday	12:00 13:30	Stuttgart –STR
Copenhagen	JAT Airways	1	Thursday	15:15	Copenhagen - CPH
	via Gothenburg	1	Saturday	18:10	
	Norwegian Air Shuttle	1	Saturday	13:00	Copenhagen – CPH
Gothenburg	JAT Airways	1	Tuesday	14:00	Gothenburg – GOT
	Wizzair	2	Wednesday Friday	12:45	Gothenburg City Airport – GSE
Brussels	JAT Airways	2	Monday Friday	7:50 15:00	Brussels – BRU
	Wizzair	2	Thursday Sunday	10:55 12:55	Brussels Charleroi- CRL
London	JAT Airways	9	All days		London Heathrow - LHR
	Wizzair	3	Monday Wednesday Friday	06:00	London Luton - LTN

Source: Analysis based on Nikola Tesla Airport reports (2013).

Table 3
Variables used in the segmentation process.

Variable set	Variable	Values	Scale
Travel Related	Frequency	Low, Medium, High, Very High	Ordinal
	Trip purpose	Business vs. Leisure	Binary
	Decision maker	Personal decision, Someone from family, Travel agency, Someone from company, Others	Nominal
Stated Preference	Ticket price	No Influence to Very High Influence (5 point scale)	Ordinal
Socio-Demographics	Level of education	Primary, Secondary, BSc, MSc, PhD	Nominal
	Residence	Serbian citizens, Emigrants, Foreigners	Nominal

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Table 4
Passengers' characteristics.

	Traditional airline passengers	Low-cost airline passengers
Socio-demographic characteristics		
Gender		
Male	52.3%	50.4%
Female	47.7%	49.6%
Age (years)		
≤24	8.1%	13.3%
25–29	14.5%	15.5%
30–39	30.9%	30.0%
40–49	21.4%	14.3%
50–59	14.7%	16.2%
60–64	5.5%	3.8%
≥65	4.9%	6.9%
Education		
Primary	.9%	4.3%
Secondary	21.3%	35.3%
University	77.8%	60.4%
Place of residence		
Serbia	53%	37%
Emigrants	14%	36%
Foreigners	33%	27%
Trip purpose		
Private	33.2%	67.5%
Business	43.4%	14.2%
Tourist	18.5%	14.9%
Others	4.9%	3.4%
Occupation		
Employed	76.7%	64.4%
Students	6.7%	13%
Retired/pensioner	7.8%	10.1%
Unemployed	5.8%	11.8%
Others	3%	.7%
Trip duration (days)		
1	2.6%	.7%
2–3	14.8%	3.8%
4–7	25.9%	18.5%
8–15	10.2%	12.2%
16–31	7%	8.2%
32–365	7.6%	8.2%
Live there	32%	50.8%

Table 5
Segments for low-cost carriers passengers.

Cluster	Segment 1 – Frequent emigrant travelers	Segment 2 – Occasional emigrant travelers	Segment 3 – Serbian travelers	Segment 4 – Foreign travelers
Size	32.4% (135)	25.4% (106)	21.1% (89)	21.1% (90)
Decision maker	Personal decision (100%)	Personal decision (100%)	Someone from family (58%)	Personal decision (100%)
Place of residence	Emigrants (57.0%)	Emigrants (52.8%)	Serbia (60.2%)	Foreigners (100%)
Frequency of flying	High (46%)	Medium (52.8%)	High (38.6%)	High (47.7%)

Table 6
The ANOVA results for the low-cost carriers segments.

		Sum of squares	df	Mean square	F	Sig.
Frequency of flying	Between Groups	79.601	3	26.534	26.825	.000
	Within Groups	408.519	413	.989		
	Total	488.120	416			
Place of residence	Between Groups	18.644	3	6.215	10.489	.000
	Within Groups	244.713	413	.593		
	Total	263.357	416			
Decision maker	Between Groups	646.045	3	215.348	485.875	.000
	Within Groups	183.049	413	.443		
	Total	829.094	416			

segments was made by passengers who are taking the trip. Segment 3 consists largely of "Serbian travellers". They tend to fly with high frequency and generally the airline choice is made by some member of their family, in comparison to the first two segments. This segment is driven by the emigrant's family members who wish to visit them abroad. As in other countries in the Western Balkans, most of the Serbian families are traditional and conservative at the core, and fostering close relationships with relatives and families remains essential for most of them. Finally, segment 4 encompasses passengers who are neither Serbian citizens nor emigrants. Those are primarily emigrants from neighboring countries (especially people from Bosnia and Herzegovina as well as

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Table 7
Segments for traditional carrier passengers.

Cluster	Segment 1 – Leisure passengers	Segment 2 – Business passengers
Size	60.2% (206)	39.8% (136)
Trip purpose	Leisure (81.6%)	Business (80.9%)
Frequency of flying	High (41.3%)	Very high (66.9%)
Level of education	University degree (54.9%)	University degree (92.6%)
Ticket price	Very high influence (47.1%)	No influence (36.8%)

Table 8
The ANOVA results for traditional carrier segments.

		Sum of squares	df	Mean square	F	Sig.
Frequency of flying	Between Groups	23.875	1	23.875	21.446	.000
	Within Groups	381.847	343	1.113		
	Total	405.722	344			
Level of education	Between Groups	63.485	1	63.485	7560.913	.000
	Within Groups	2.880	343	.008		
	Total	66.365	344			
Trip purpose	Between Groups	1.917	1	1.917	7.937	.005
	Within Groups	82.865	343	.242		
	Total	84.783	344			
Ticket price	Between Groups	12.142	1	12.142	4.637	.032
	Within Groups	898.021	343	2.618		
	Total	910.162	344			

Montenegro, who cannot travel from their respective countries due to the lack of air services, and therefore use Belgrade Airport) and young people from different parts of Europe who visit Belgrade as a new attractive destination on the map of Europe. Therefore, this segment is named “Foreign travellers”.

4.2. Traditional passengers segments

The passengers who use traditional airlines were grouped into two segments with distinctive characteristics (Table 7). The silhouette measure of cluster cohesion and separation is .7 indicating a good quality cluster model. The results of the ANOVA analysis indicate that all variables are significantly different across the identified segments (see Table 8).

Trip purpose has always been a fundamental segmentation variable in the air travel market, as confirmed by the results in Table 7. The first segment, “leisure passengers”, included 60.2% of the total sample, while the second segment, “business passengers”, accounted for 39.8% of the sample (Table 7). The first segment represents the passengers who mostly fly on leisure, while the second segment consists predominately of the passengers flying for business. The common characteristic for both segments is a university degree. However, the share of university degree passengers is higher among business passengers (more than 90%) compared to the leisure segment with more than 50%. Segment 1 is characterized by passengers who travel two to three times per year (high frequency) and are highly influenced by the ticket price, whereas segment 2 encompasses passengers who travel very often and the price of ticket is not a factor that they consider when choosing the airline.

5. Conclusion

The liberalization of the market that occurred after Serbia joined the European Common Aviation Area in 2006 enabled the Serbian air travel market to grow significantly through stimulating the competition and lowering the price of air services. In addition to regulatory changes in the aviation sector, abolishment of the strict visa regime for Serbian citizen has played a vital role in triggering a significant growth in air traffic. After the field for healthy competition was established, the Serbian air travel market started to reap the benefits of the cheaper low-cost carrier services.

Results of the analysis of Belgrade Airport are not surprising, and they validate the hypothesis that introducing a new LCC service in the market induces a new segment of passengers, a finding observed in countries with emerging economies. The penetration of low cost carriers in the Serbian air travel market has permanently altered the passenger flow patterns by generating a new segment of passengers. These are primarily young Serbian people who can now afford to travel by air due to sufficiently low prices offered by the low cost carriers. Additionally, LCCs have offered routes which track the migratory patterns, which have had a substantial impact on the increased number of emigrants who frequently visit their homeland. Therefore, LCCs induce a completely new segment of passengers, who would have used other modes of transport otherwise. Members of the emigrants' family and friends who are in the homeland are also able to travel by air to visit them, and in the majority of cases their family abroad buys the ticket for them. On the other hand, use of LCC services by business passengers has not reached the level present in the European short-haul business travel market. Still, only a small portion of LCC passengers fly for business purpose.

Passengers who fly with traditional airlines remain within the boundaries in which both business and leisure passengers are willing to fly with the carrier if it meets their needs in an appropriate manner. However, traditional airlines at Belgrade Airport serve as feeders to major network airlines at large hubs for connecting to other destinations (i.e. transfer passengers). The results show that Belgrade Airport needs to be ready to meet the demands of the passengers as well as their mix in order to be profitable.

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Appendix. Total weekly seat capacity offered by all airlines operated at Belgrade Airport in third week of May 2013.

Airline	Destinations (routes with no competition)	Destinations (routes where operate two or more traditional airlines)	Destinations (routes where operate traditional airlines and LCC)	Total weekly seat capacity
JAT Airways	Amsterdam, Berlin Tegel, Dusseldorf, Larnaca, Sarajevo, Skopje, Thessaloniki, Tel Aviv	Athens, Vienna, Zurich, Frankfurt, Moscow SVO, Rome Fiumicino, Tivat, Podgorica	Brussels, Gothenburg, Istanbul Ataturk, Copenhagen, London Gatwick, London Heathrow, Milan Malpensa, Stockholm Arlanda, Stuttgart	49,332
Wizzair	Eindhoven, Basel Mulhouse, Dortmund, Malmo	–	Brussels Charleroi, Gothenburg City, London Luton, Memmingen, Stockholm Skavsta	14,040
Montenegro Airlines		Tivat, Podgorica		8792
Lufthansa		Frankfurt	Munich	4416
Aeroflot		Moskow SVO		4040
Swiss		Zurich		3968
Turkish Airlines			Istanbul Ataturk	3592
Alitalia		Rome Fiumicino		2396
Pegasus Airlines			Istanbul Sabiha Gokcen	2268
Norwegian Air Shuttle	Oslo		Copenhagen, Stockholm Arlanda	1708
Flydubai	Dubai			1512
Etihad Airways	Abu Dhabi			1456
Austrian Airlines		Vienna		1116
EasyJet			Milan Malpensa	936
LOT – Polish Airlines	Warsaw			924
Qatar	Doha			864
Germanwings			Stuttgart	858
Olimpic Air		Athens		780
Adria Airways	Ljubljana			594
Air Cairo	Hurgada			531
Tunisair	Tunis			504
TAROM	Bucharest Otopeni			480

Source: Analysis based on Nikola Tesla Airport reports (2013).

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