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# Domestic market share by routes, frequencies and airlines to and from the Quito International Airport

Cuota de mercado nacional por rutas, frecuencias y aerolíneas desde y hacia el  
Aeropuerto Internacional de Quito

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## Abstract

The objective of this study was to identify the market share of domestic commercial air transportation by routes, frequencies and airlines from Mariscal Sucre International Airport during the weekly period from June 20 to 24, 2022. Through descriptive quantitative research, which sought to specify characteristics, variables and relevant concepts to measure the domestic market share. Through the results obtained, it is concluded that of the four airlines that operate domestic flights in Ecuador, Latam Airlines showed dominance in this market by routes and frequencies to and from the Mariscal Sucre International Airport in Quito during the weekly period from June 20 to 24, 2022.

**Keyword:** market share, airlines, domestic operation, frequencies, routes

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## Resumen

El objetivo de este estudio fue identificar la participación de mercado del transporte aéreo comercial nacional por rutas, frecuencias y aerolíneas desde el Aeropuerto Internacional Mariscal Sucre durante el período semanal del 20 al 24 de junio de 2022. A través de una investigación cuantitativa descriptiva, en la que se buscó precisar características, variables y conceptos relevantes para medir la participación del mercado doméstico. A través de los resultados obtenidos, se concluye que de las cuatro aerolíneas que operan vuelos domésticos en el Ecuador, Latam Airlines mostró dominio en este mercado por rutas y frecuencias desde y hacia el Aeropuerto Internacional Mariscal Sucre de Quito durante el periodo semanal del 20 al 24 de junio de 2022.

**Palabra clave:** cuota de mercado, aerolíneas, operación doméstica, frecuencias, rutas

## Introduction

It is specified that market share is the percentage of market corresponding to a company against its competitors (Kotler & Armstrong, 2012; Harris & Nguyen, 2022), being the case of the air market that formed by the origin-destination routes handled by several airlines and a dominant company that shows a relevant presence in the market with a percentage higher than 40% (Gonzales, 2013). In the words of the Special Administrative Unit of Civil Aeronautics (s.f, cited in Ribadeneira, Vega & Cruz, 2021) they are identified as commercial air service companies that are legally authorized to operate in a country and are one of the elements that are part of air traffic and air connectivity.

It is for this reason, and based on the concept related to airlines mentioned above, that it is possible to speak of the "passenger air transport service operating through national or foreign airlines, that performs transport on a regular or non-scheduled basis with established routes and schedules" (Rosales Tapia, 2015). Also, to execute this service, a technical organization of frequencies is required, as Beloba, Odoni, & Barnhart (2009) point out, flight frequency is the number of times an airline provides service between an origin and a destination considered as one of the most important factors for an airline to measure its market share, together with the departure schedule of each of the routes.

In 2017, the research conducted by Sandra Rivera Flores and Mario Rivera Flores, that was about the design of internationalization strategies of the flight company Tame, mentions that commercial air traffic in Ecuador was an event that began from the flight made by Elia Liut in 1920, who piloted a plane from Guayaquil to

Quito. Thanks to this moment, the development of aviation in the country began and by 1946 the General Directorate of Civil Aviation [DGAC], the entity that to this day regulates aeronautical activity in this territory, was created.

Fifteen years later, the Sociedad Colombo Alemana de Transportes Aéreos [SCADATA], later known as Avianca, began operations in the country and in 1957 Ecuatoriana de Aviación was born as one of the national airlines with a high concentration of international operations on routes to Cali, Lima, Miami, New York, Los Angeles, Bogota, Caracas, Panama, Mexico, Santiago and Buenos Aires, but ceased operations definitively in 2006. In 1962 Transportes Aéreos Militares Ecuatorianos [TAME] was created as the country's flagship carrier and leader in the domestic market, and in 1985 Aerolineas Galapagos [AeroGal] appeared, operating domestic flights to Galapagos, Quito, Coca, Lago Agrio, Manta and Guayaquil. In 2010 this airline was dissolved when it was absorbed by Avianca to be called Avianca Ecuador; in 2002 the flag carrier of Chile, LAN, started operations in the country and after the opening of Latin American market opportunities, it began to acquire other airlines and create subsidiaries, such as LAN Ecuador, which began operations under that brand in 2003 (Rivera & Rivera, 2017).

By 2018 Aeroregional was formed as another airline that would help promote domestic connectivity, starting its regular commercial operations on the Cuenca-Quito- Guayaquil route a year later, and after the unfortunate bankruptcy of TAME in 2020, Equinoccial Air [Equair] was founded, a new Ecuadorian airline that began operations from Quito to Guayaquil in 2022 (Ministerio de Transporte y Obras Públicas, 2022).

Therefore, the object of study of this research is based on identifying the market share of domestic commercial air transport of passengers by routes, frequencies and airlines from Quito International Airport during a weekly period of time from June 20 to 24, 2022. Thus, this research is based on a bibliographic review as a theoretical basis for research and the collection and analysis of data, from a weekly cut, for the measurement of market share.

## Materials and methods

In order to establish guidelines through data collection based on numerical measurement and statistical analysis, this research used a descriptive quantitative research approach, which seeks to specify important characteristics of the study phenomenon, in addition to defining variables and measuring concepts, in this case, the participation of the domestic market.

In addition, the analytical-synthetic method was used, which allows breaking down a whole into its parts to analyze the data obtained from the results.

In this research, the review of secondary sources of information (bibliographic) was used as the technique to argue the theoretical basis of the research and to obtain quantitative data that help to numerically dimension the results.

Therefore, the search, review and selection of information to support the research was based on data taken from the official websites of airports, airlines, other research and governmental agencies, which were validated and processed through bibliographic files and information reliability criteria.

## Results

The results obtained from the data collection and analysis of the variables studied are presented and analyzed below. For a better synthesis of data, the graphs and tables use acronyms corresponding to the codes established by the International Air Transport Association [IATA], for each pair of cities and airlines, except for Aeroregional, which used the code established by the International Civil Aviation Organization [ICAO].

**Table 1.** Domestic routes by airline weekly cut-off June 20 to 24

ROUTES	Latam Airlines (LA)	Avianca Airlines (AV)	Aeroregional (RER)	Equair (HN)
UIO-CUE-UIO	49	25	0	0
UIO-MEC-UIO	14	27	0	0
UIO-ETR-UIO	0	0	8	0
UIO-GYE-UIO	137	109	0	58
UIO-GPS-UIO	32	33	0	8
UIO-SCY-UIO	14	16	0	7
UIO-OCC-UIO	12	0	10	0
UIO-LOH-UIO	4	0	28	0
<b>Total</b>	<b>262</b>	<b>210</b>	<b>46</b>	<b>73</b>

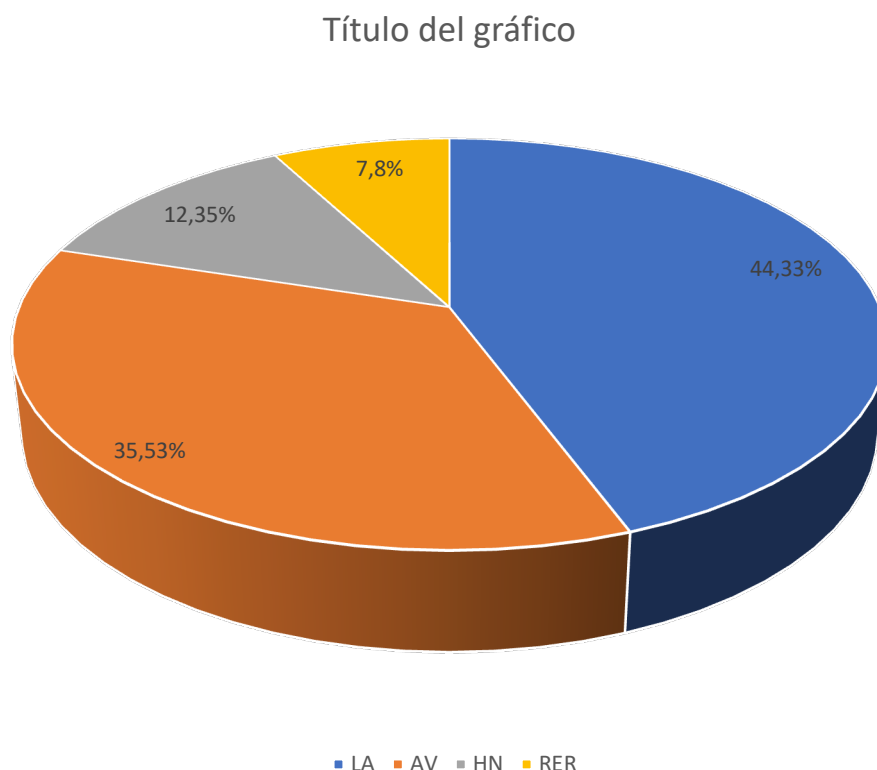
Note: UIO: Quito; CUE: Cuenca; MEC: Manta; ETR: Santa Rosa; GYE: Guayaquil; GPS: Galápagos- Baltra; SCY: Galápagos-San Cristóbal; OCC: Coca; LOH: Loja.  
Source: Authors, 2022

Regarding the variables of airlines and frequencies, it was found that for the weekly cut-off from June 20 to 24, 2022, the total number of domestic flights operated by the four airlines that provide this service was 591. Latam Airlines,

Avianca and EquAir concentrate their domestic operation on the route to Guayaquil, with 137, 109 and 58 flights respectively, while Aeroregional concentrates it on the route to Loja, with 28 flights of its total.

For this reason, the market share of each airline with respect to the total number of frequencies accounted for is shown below.

**Chart 1.** Market share of domestic operations by airline

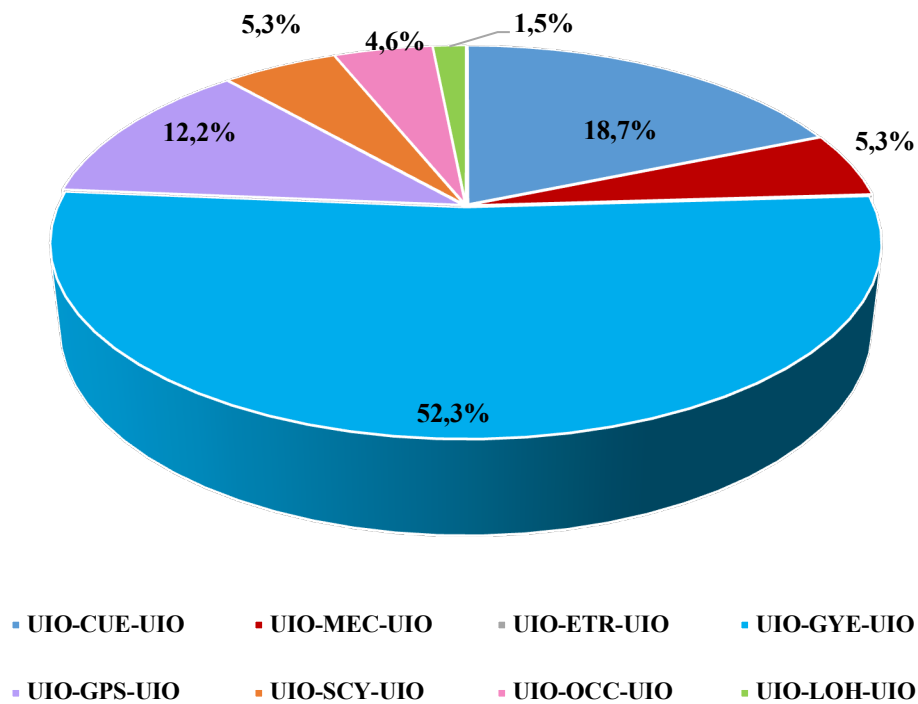


Source: Authors, 2022

As shown in the Chart above, Latam is the airline that obtained the highest concentration of market share in domestic operation, representing 44.33% of the total number of frequencies accounted for the weekly cut-off from June 20 to 24, 2022. Avianca ranked second with 35.53%, Equair with 12.4% and Aeroregional with 7.8%.

On the other hand, each airline is analyzed below with respect to the distribution of direct domestic flights of each one, thus exposing the most representative route of the total operated by each airline.

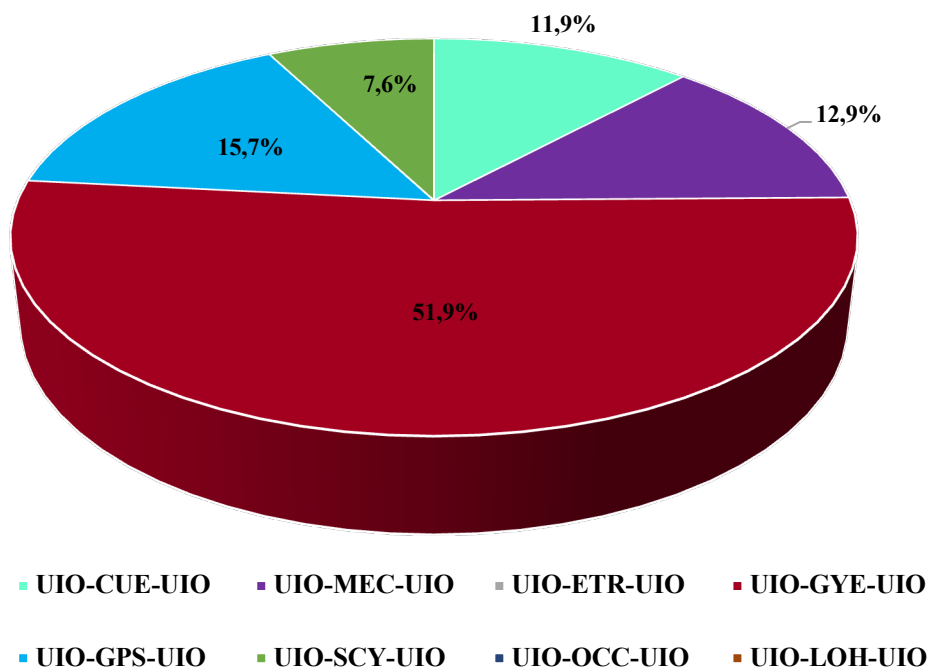
**Chart 2.** Latam airline's direct domestic flights operation



Source: Authors, 2022

Thus, it has been determined that of the total number of flights operated by Latam during the weekly cut-off from June 20 to 24, 2022, 52.3% of domestic operations are the percentage representation of the 137 frequencies accounted for in Table 1, to the city of Guayaquil. In addition, it is observed that the next route with the highest operation performed by this airline is Quito-Cuenca-Quito with 18.7%, followed by: Quito-Baltra-Quito with 12.2%, Quito-Manta-Quito with 5.3%, Quito-San Cristobal-Quito with 5.3%, Quito-Francisco de Orellana-Quito with 4.6% and Quito-Loja-Quito with 1.5%. It is evident that this airline does not operate on the Quito-Santa Rosa-Quito route.

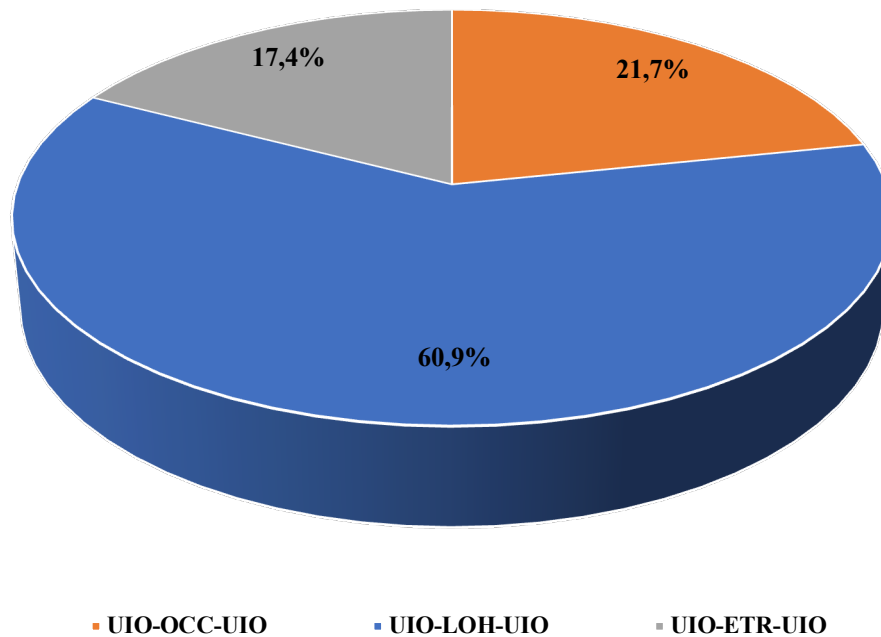
**Chart 3.** Avianca's direct domestic flights operation



Source: Authors, 2022

Likewise, it has determined that of the total number of flights operated by Avianca during the weekly cut-off from June 20 to 24, 2022, the above Chart shows that 51.9% of domestic operations are the percentage representation of the 109 frequencies accounted in Table 1 for this airline, to the city of Guayaquil. In addition, the routes operated by Avianca that follow in percentage to the aforementioned are: Quito-Baltra-Quito with 15.7%, Quito-Manta-Quito with 12.9%, Quito-Cuenca-Quito with 11.9% and Quito-San Cristóbal-Quito with 7.6%. It was also identified that there is no operation on the Quito-Francisco de Orellana-Quito or Quito-Loja or Quito-Santa Rosa-Quito routes.

**Chart 4.** Aeroregional's direct domestic flight operation

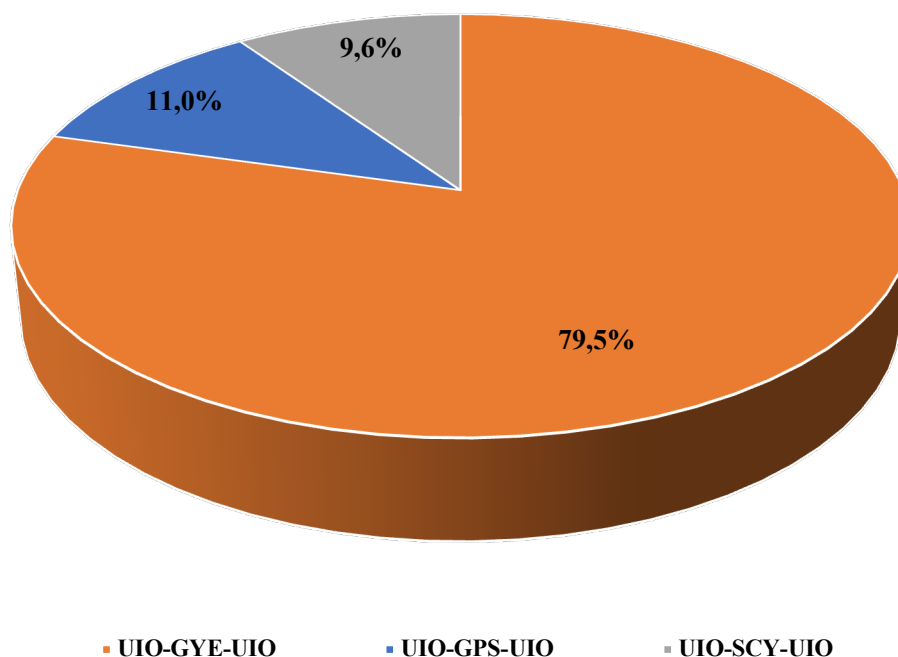


Source: Authors, 2022

Of the total number of flights operated by Aeroregional during the weekly cut-off from June 20 to 24, 2022, the above Chart shows that 60.9% of domestic operations are represented by the 46 frequencies listed in Table 1 to the city of Loja, followed by 21.7% for the Quito-Francisco de Orellana-Quito route and Quito-Santa Rosa-Quito with 17.4%. As with the other airlines, it was also identified that this airline does not operate flights to Guayaquil, Cuenca, Baltra, San Cristóbal and Manta.



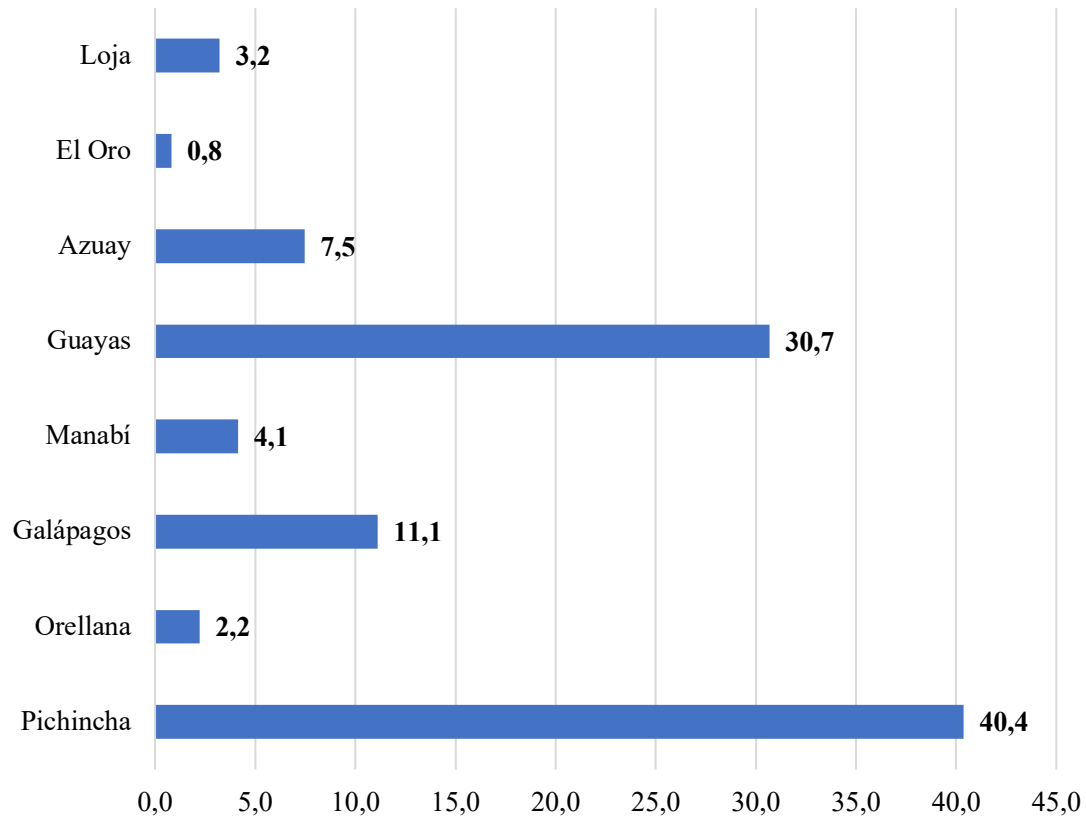
**Chart 5.** Equair airline's direct domestic flight operations



Source: Authors, 2022

In the same way, of the total number of flights operated by Equair during the weekly cut-off from June 20 to 24, 2022, the above Chart shows that 70.5% of domestic operations are the percentage representation of the 73 frequencies accounted in Table 1 to the city of Guayaquil, as occurred with Latam and Avianca. It is followed by the Quito-Baltra- Quito route with 11% and the Quito-San Cristóbal- Quito route with 9.6%. Equair did not operate from Quito to Francisco de Orellana, Loja, Santa Rosa, Cuenca and Manta.

**Chart 6.** Domestic commercial air transportation by province

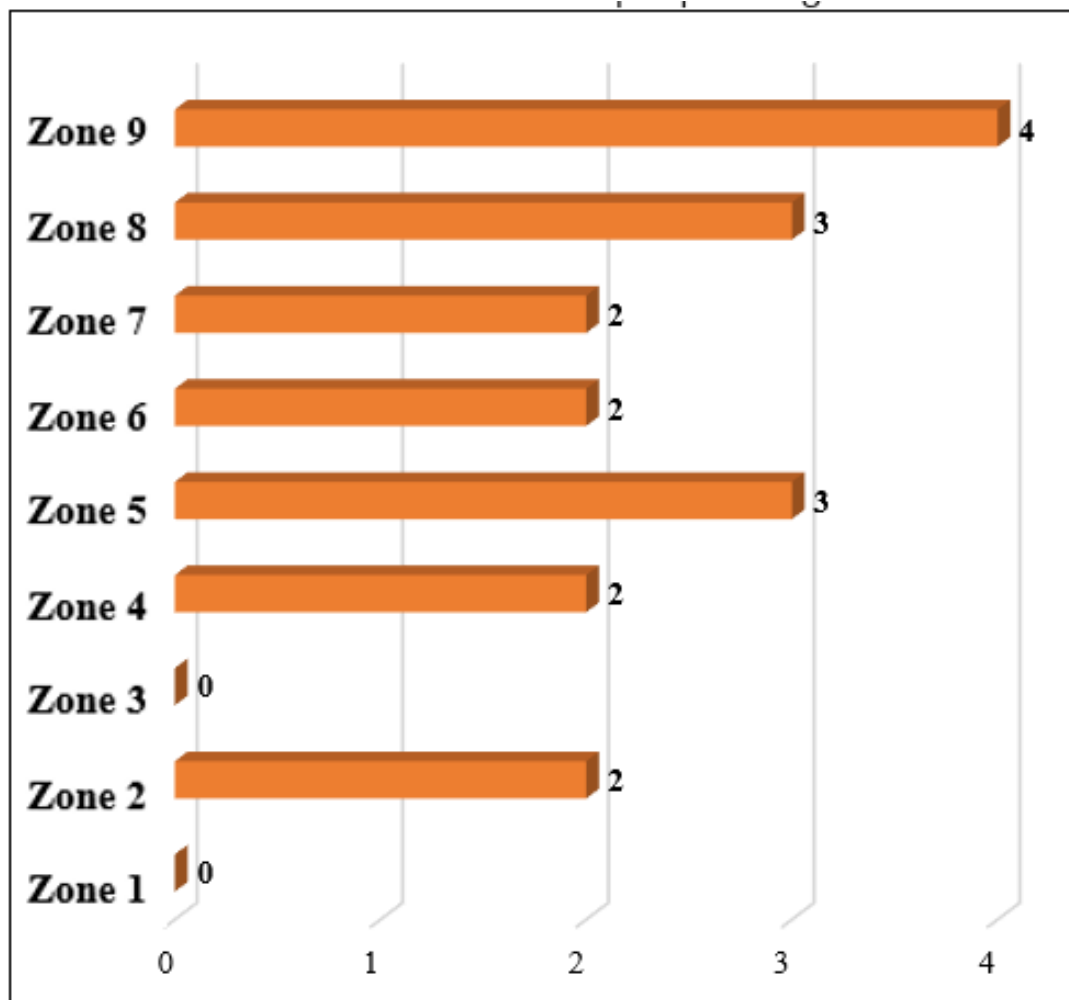


Source: Authors, 2022

On the other hand, as shown in the chart above, the provinces of Ecuador that currently operate direct domestic flights from Quito airport are: Pichincha with 40.4%, Guayas with 30.7%, Galapagos with 11.1%, Azuay with 7.5%, Manabí with 4.1%, Loja with 3.2%, Orellana with 2.2% and El Oro 0.8%. This made it easier to identify that, based on the sample taken from the weekly cut-off from June 20 to 24, 2022, there is no domestic air transportation operation in 16 of the 24 provinces that make up the national territory.

Due to the fact that Ecuador is divided by planning zones to facilitate its development, the scope of domestic operation is presented and analyzed below, taking into account the number of airlines operating during the weekly cut-off from June 20 to 24, 2022 in each of the 9 existing zones, which are: Zone 1 (Esmeraldas, Imbabura, Carchi and Sucumbíos) Zone 2 (Pichincha without the Metropolitan District of Quito, Napo and Orellana), Zone 3 (Cotopaxi, Tungurahua, Chimborazo and Pastaza) Zone 4 (Manabí and Santo Domingo de los Tsáchilas), Zone 5 (Santa Elena, Bolívar, Los Ríos, Galápagos and Guayas except Guayaquil, San Borondón and Durán) zone 6 (Cañar, Azuay and Morona Santiago), zone 7 (El Oro, Loja and Zamora Chinchipe), zone 8 (Guayaquil, San Borondón and Durán), zone 9 (Metropolitan District of Quito).

**Chart 7.** Number of airlines per planning zones



Source: Authors, 2022

As shown in the chart above, the operation of direct domestic flights is currently concentrated in zones 5, 8 and 9 with 3 of the 4 airlines mentioned throughout the study (Latam, Avianca and Equair), reflecting the fact that most of the domestic flights shown above are from Quito to Guayaquil and Galapagos. Zone 1 and 3 do not operate due to market reorganization.

Once the data has been presented and analyzed, we proceed to propose a discussion that aligns with the stipulations of Beloba, Odoni, & Barnhart (2009), with respect to the fact that frequency is considered one of the most important factors for an airline to measure its market share, as evidenced by the difference between the number of routes operated domestically by each airline in relation to the Mariscal Sucre International Airport in Quito during the period from June 20 to 24, 2022.

Therefore, what was proposed by (Kotler & Armstrong, 2012), in relation to market share as the percentage of market corresponding to a company against its competitors, is demonstrated in the participation of domestic operating airlines, one against the other, which generate a market leadership that can be measured through routes and frequencies. In addition, Gonzales (2013), states that a company can be considered as dominant from 40% of participation, which in the case of the results obtained, agrees with what was proposed since Latam Airlines presented a percentage higher than this value with respect to its competitors in the domestic market, both in number of routes and frequencies.

## Conclusions

Based on the results obtained, it is concluded that of the four airlines that operate domestic flights in Ecuador, Latam Airlines showed dominance in this market by routes and frequencies to and from the Mariscal Sucre International Airport in Quito during the weekly cut-off period from June 20 to 24, 2022.

For frequencies, it is identified that they are important factors for the measurement of market share by airline as presented in the Quito-Guayaquil-Quito route that registers the highest frequency in Latam's domestic operation, with 52.3%, which allows it to dominate the domestic market. Avianca airline appears in second place in relation to the number of routes operated in the domestic market, differentiating itself from Latam, prioritizing the operation to Manta airport over Cuenca airport.

For Aeroregional airline, it is evident that its domestic operation is much smaller than the two previous ones and that it operates with airports of lower demand in the market, such as Loja, Santa Rosa and Francisco de Orellana, the first being the one that obtained the highest number of operations by this airline with 60.9%. In the same way, for Equair airline it shows that from its initial operations in 2022, presents a greater participation in the domestic market in relation to Aeroregional, which began operating in 2018. In addition, its reduced domestic participation is justified, just like Aeroregional airline, because its market is composed of routes with higher demand, such as those of Guayaquil, Baltra and San Cristóbal airports.

Finally, relating Ecuador's planning zones to domestic operations, it can be identified that zone 9, which includes Quito airport, zone 8 with Guayaquil airport, and zone 5 with Baltra and San Cristóbal airports, concentrate the highest frequency operation due to the number of airlines serving these routes. Unlike zones 1 and 3, which do not operate due to market reorganization

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