

Análisis comparativo del transporte aéreo comercial doméstico de rutas, frecuencias y aerolíneas desde y hacia el Aeropuerto Internacional de Guayaquil Ecuador del 23 al 29 de marzo del 2026.

Comparative analysis of domestic commercial air transport of routes, frequencies and airlines to and from the Guayaquil International Airport from March 23 to 29, 2026

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Imaginario Social
Entidad editora
REDICME (reg-red-18-0061)

e-ISSN: 2737-6362
especial 2026 Vol. 9-2-2026
<http://revista-imaginariosocial.com/index.php/es/index>

Recepción: 06-03-2026
Aceptación: 27-03-2026

pp.190-200

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<https://orcid.org/0009-0000-0559-8353>**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 Guayaquil, durante el período semanal del 23 al 29 de marzo de 2026. 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 tres 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 Guayaquil durante el periodo semanal del 23 al 29 de marzo de 2026.

Palabras clave: aviación, aerolíneas, terminal aéreo, frecuencias, rutas.

Abstract

The objective of this study was to identify the market share of domestic commercial air transport by routes, frequencies, and airlines operating from José Joaquín de Olmedo International Airport in Guayaquil during the weekly period from March 23 to March 29, 2026. A descriptive quantitative research approach was used, aiming to specify relevant characteristics, variables, and concepts in order to measure participation in the domestic air transport market. Based on the results obtained, it is concluded that among the three airlines operating domestic flights in Ecuador, LATAM Airlines demonstrated dominance in terms of routes and flight frequencies to and from José Joaquín de Olmedo International Airport during the weekly period from March 23 to March 29, 2026.

Keywords: aviation, airlines, airport terminal, flight frequencies, routes.

Introduction

According to the International Civil Aviation Organization, the commercial aviation market is defined as the set of services, operations, and regulations that enable the international air transport of passengers and cargo under uniform standards, ensuring safety, efficiency, sustainability, and accessibility (International Civil Aviation Organization, 2013). Simultaneously, market identification within the airline industry, based on origin-destination routes, establishes market leadership for companies that maintain a relevant presence within these sectors (Ribadeneira Páez et al., 2021).

Furthermore, an airport is an infrastructure designed for the movement of passengers, mail, and cargo, while also fulfilling functions related to sovereignty and national security. Currently, it constitutes an essential node for civil aviation and the international economy (International Civil Aviation Organization, 2013). Regarding airport services, the International Air Transport Association defines them as the set of provisions that enable the efficient and safe operation of airports, encompassing both passenger services and technical support for airlines (International Air Transport Association, 2025).

The Directorate General of Civil Aviation of Chile understands airport operational efficiency as the capacity of these infrastructures to guarantee safe, punctual, and sustainable operations. This is achieved by optimizing resources such as fuel, flight time, and runway capacity in coordination with airlines and public agencies (Dirección General de Aeronáutica Civil de Chile, 2024).

The José Joaquín de Olmedo International Airport, located in the city of Guayaquil, Guayas Province, Ecuador, is operated under a concession by TAGSA under the supervision of the Guayaquil Airport Authority and regulated by the DGAC Ecuador. Featuring modern infrastructure and the capacity for international and domestic flights, it has been ranked among the best airports in Latin America due to its efficiency and customer service. Its operational services—including immigration control, airport security, ground handling, and cargo logistics—are characterized by high levels of efficiency and quality (Dirección General de Aviación Civil del Ecuador, 2025).

Likewise, LATAM Airlines Chile is the flag carrier of Chile, headquartered in Santiago, and is part of the LATAM Airlines Group, the largest airline holding company in Latin America. Established in 1929 as Línea Aérea Nacional (LAN-Chile), it adopted the

name LATAM Airlines Chile in 2016 following its merger with TAM Airlines of Brazil. It operates in more than 47 international and domestic destinations with a fleet of over 300 modern aircraft, including the Boeing 787 Dreamliner and Airbus A320/A321 (Verdesoto, 2020).

Subsequently, other significant airlines began to establish themselves in this market, such as Avianca, which is the largest and oldest airline in Colombia with over 100 years of history. As a member of Star Alliance, it utilizes a modern fleet to connect Colombia with the Americas and Europe. Founded in 1919 and based in the cities of Bogotá and Barranquilla—with its primary hub at El Dorado International Airport (Bogotá)—it belongs to the Avianca Group and the ABRA holding company. It maintains a fleet of approximately 130 aircraft, including Boeing 787 and Airbus A320, A319, and A330 models, operating in more than 74 destinations across Colombia, the Americas, and Europe (Holguín, 2016).

Consequently, the objective of this research is to identify the market share of domestic commercial air passenger transport by routes, frequencies, and airlines departing from Guayaquil International Airport during a weekly period from March 23 to March 29, 2026, and to facilitate its comparison. In this manner, the present study is based on a literature review as a theoretical foundation, alongside the collection and analysis of data for the measurement of market share. It is considered vital for academic stakeholders to contribute through the study of new information that benefits public knowledge on the subject and assists in improving the tourism activities of the subjects under study.

Methodology

The present research is underpinned by a quantitative approach, which facilitates the collection and analysis of data to address research questions and test previously established hypotheses, relying on numerical measurement and statistical analysis to accurately determine behavioral patterns within a population. According to Hernández-Sampieri et al. (2014), this approach is sequential and evidentiary, where each stage precedes the next and processes cannot be bypassed, thereby ensuring the scientific rigor necessary for the study of domestic operations.

Research Design and Scope

The study is defined within a descriptive scope. This level of research aims to specify the properties, characteristics, and profiles of individuals, groups, communities, processes, or objects subjected to analysis. In this regard, Arias (2012) notes that descriptive research involves the characterization of a fact, phenomenon, individual, or group to establish its structure or behavior. Accordingly, the research was oriented toward detailing the numerical specificities of the analyzed operation, ensuring a systematic and precise examination of the variables involved.

Analysis Method

To explore the most significant aspects of the operation, the analytical-synthetic method was utilized. This procedure initially allowed for the decomposition of the phenomenon into its constituent elements to minutely examine each component of operational management (analytical phase). Subsequently, these parts were reassembled to achieve an integral and holistic perspective of the results (synthetic phase), ensuring that the findings were robust, verifiable, and consistent with the observed reality.

Data Collection Techniques and Instruments

Information was gathered using documentary research techniques and the review of secondary bibliographic and digital sources. The collection, review, and selection of data were conducted from high-reliability official sources, such as:

- Institutional web portals of international airports.
- Airline operational databases and reports.
- Technical publications from the aeronautical sector.

The collection process was governed by strict criteria of reliability and validity, ensuring that the generated quantitative information supported a faithful numerical interpretation of the studied phenomenon. The data was processed using descriptive statistical techniques, facilitating the identification of frequencies, averages, and trends within domestic operations.

Results

This section presents the data analysis corresponding to the study variables. To facilitate an effective synthesis, tables and figures have been prepared using the

abbreviations designated by the International Air Transport Association (IATA) to identify each city pair and airline.

Table 1: Domestic Routes by Airline: Weekly Period from March 23 to March 29, 2026

ROUTE	LATAM	AVIANCA	AEROREGIONAL	TOTAL
UIO-GYE-UIO	132	102	2	236
GPS-GYE-GPS	36	24	0	60
SCY-GYE-SCY	20	18	0	38
CUE-GYE-CUE	10	0	0	10
TOTAL	198	144	2	344

Note: UIO: Quito, GYE: Guayaquil, GPS: Baltra, SCY: San Cristóbal, CUE: Cuenca.
Source: Own elaboration.

Analysis of Airlines and Frequencies

Regarding the airline and frequency variables, a total of 344 domestic flights were operated during the weekly period of March 23 to March 29, 2026, by the three companies providing this service. The data indicates that the highest concentration of domestic operations is found on the Quito – Guayaquil – Quito (UIO-GYE-UIO) route, accounting for 236 flights.

LATAM maintains a dominant presence across the analyzed network with a total of 198 frequencies. Its primary operation is concentrated on the UIO-GYE-UIO trunk route with 132 flights, followed by significant activity on the Galapagos routes, specifically GPS-GYE-GPS (36 flights) and SCY-GYE-SCY (20 flights). Furthermore, it is the sole operator for the CUE-GYE-CUE route during this period, with 10 frequencies.

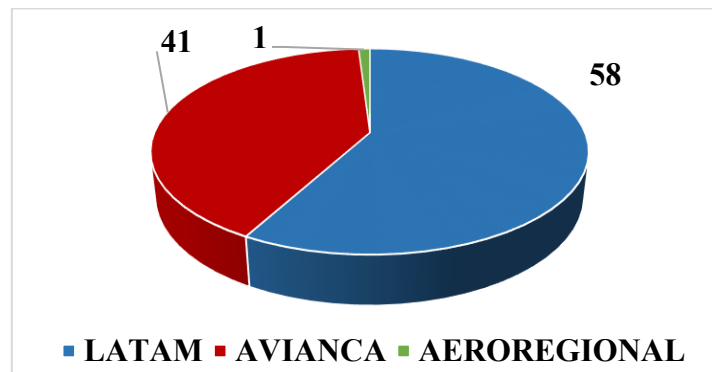
Avianca stands out as a significant competitor with 144 total domestic flights. Its operation is also heavily centered on the UIO-GYE-UIO route (102 flights),

maintaining a strong competitive position in the Galapagos market with 24 frequencies to Baltra (GPS) and 18 to San Cristóbal (SCY).

In contrast, Aero Regional shows a marginal participation in the domestic market from Guayaquil, operating only two weekly flights on the UIO-GYE-UIO route and showing no activity on the other monitored routes.

The following section details the market share represented by each airline relative to the total frequencies recorded for the specified weekly period.

Figure 1 Domestic Market Share by Airline (March 23–29, 2026)

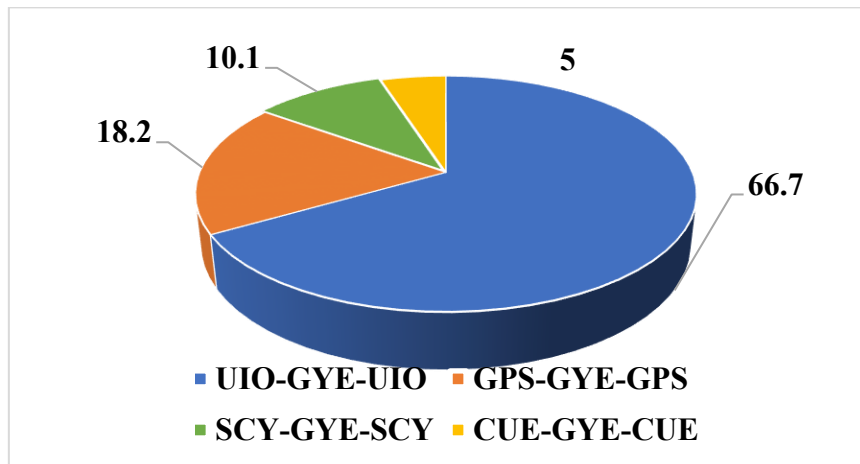


Source: Own elaboration.

As illustrated in the preceding figure, LATAM stands out as the leading airline in terms of domestic market share, accounting for 58% of the total frequencies recorded during the week of March 23–29, 2026. In a secondary position, Avianca ranks second with 41%, followed by Aero Regional with 1%.

The following figure presents data reflecting the distribution of market share across the domestic operational routes of LATAM Airlines.

Figure 2 Direct Domestic Flight Operations of LATAM Airlines

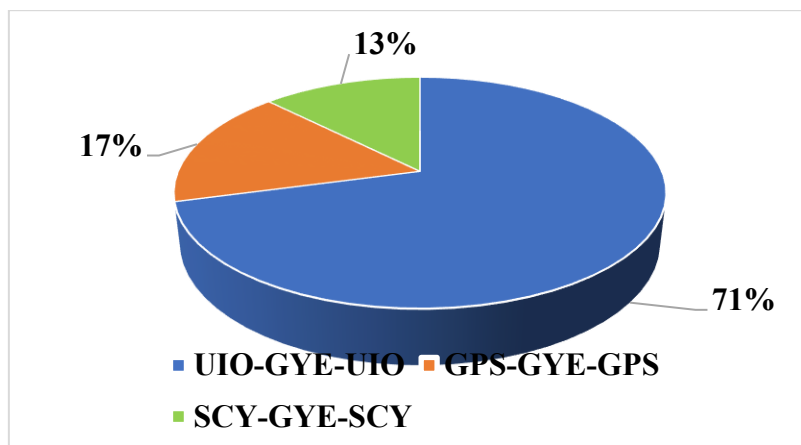


Source: Own elaboration.

Accordingly, it has been determined that out of the total flights operated by **LATAM** during the weekly period from March 23 to March 29, 2026, **67%** of domestic operations correspond to the **132 frequencies** recorded in Table 1, with the city of **Quito** serving as its primary route. This concentration suggests high demand or significant strategic importance for this corridor. Furthermore, the route with the next highest operational volume for this airline is **GPS-GYE-GPS** at **18%**, followed by **SCY-GYE-SCY** at **10%**, and the **CUE-GYE-CUE** route at **5%**.

The following figure presents the data reflecting the market share distribution across the domestic operational routes of **Avianca**.

Figure 3 Direct Domestic Flight Operations of Avianca

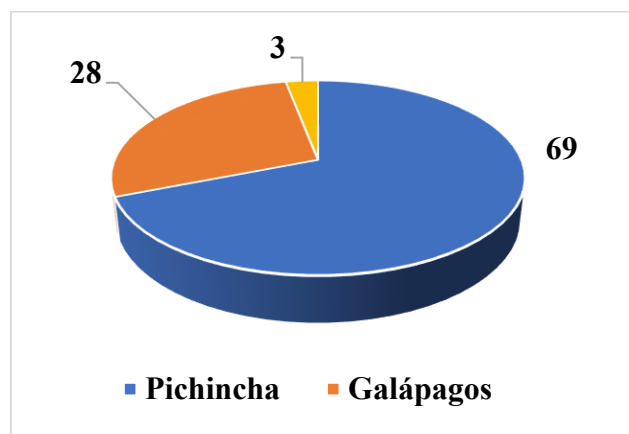


Source: Own elaboration.

As illustrated in the preceding figure, it has been determined that out of the total domestic flights operated by Avianca during the weekly period from March 23 to March 29, 2026, 71% of operations correspond to the 102 frequencies recorded in Table 1 for the route to Guayaquil. Furthermore, the operational routes with the next highest percentage shares are GPS-GYE-GPS at 17%, followed by SCY-GYE-SCY at 13%.

In addition, domestic operations from Guayaquil Airport are distributed by Ecuadorian provinces, as shown in the following figure:

Figure 4 Domestic Commercial Air Transport at Guayaquil Airport by Province



Source: Own elaboration.

As illustrated in the preceding figure, out of the total flights operated from Guayaquil Airport during the weekly period of March 23 to March 29, 2026, 69% of domestic operations—representing the 236 frequencies recorded—are concentrated toward the province of Pichincha. This is followed by 28% toward the province of Galápagos and 3% toward the province of Azuay.

Discussion

Following the presentation of the results, the identification of LATAM as a market leader is evident. Its leadership is sustained by its demonstrated relevance within the

aviation industry, particularly across the origin-destination routes managed to and from the airport under study.

Furthermore, the concentration of flight frequency supply by the aforementioned airlines, coupled with passenger demand for specific routes at Guayaquil Airport, suggests a clear preference for certain domestic destinations. This trend may be driven by factors such as competitive fares, accessibility, and the efficiency of airport services. Consequently, these patterns generate significant competitiveness challenges for airlines operating within the airport, as they strive to optimize their presence in high-demand corridors.

Conclusions

Synthesizing the research findings, it has been determined that with a 58% market share, LATAM dominates the domestic supply at Guayaquil International Airport during the weekly period of March 23–29, 2026. This dominance indicates a robust and superior service capacity compared to other operators, establishing the airline as the definitive leader in the domestic flight market.

Similarly, Avianca's significant participation, accounting for 41% of operations, positions it as the second strongest competitor. This standing may reflect a strategic focus on competitive pricing for specific routes where the airline has secured a comparative advantage.

Finally, regarding the geographic distribution of routes from Guayaquil Airport, the majority of flights are concentrated toward the province of Pichincha (69%), followed by Galápagos (28%), and Azuay (3%). These figures underscore the high level of centralization in air connectivity toward the country's main administrative and tourism hubs.

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