

# Impact of Low Cost Carriers on Turkish Tourism Industry<sup>1</sup>

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## **Abstract**

*Low cost carriers (LCC's) are one the fastest growing and becoming important part of the airline industry since they start operations 1970's. Tourism one of the major industries in the World is linking closely air transportation. Tourism industry is extremely important for developing countries like Turkey. After deregulation 1978's in USA, liberalization of airline industry started in the World. 1983 first package of deregulation give right to start private enterprises in Turkey and then 2002 second part is give airlines operate without any limitation. After all some Turkish airlines choose LCC's business model, some of them change business model charter to LCC. Turkey one of the major tourist destination in the World and tourism industry plays important role in the country economy. Tourism and airline industries linking each other, growth simultaneously. LCC's give service more than 20 million of passenger and billions USD revenue for Turkish national economy.*

**Key words:** Air Transport, Tourism, Low Cost Carriers, Turkey, Airlines.

## **1.Introduction**

For many people in developed countries taking a holiday in a year is norm. It is part of a life cycle. Tourism is not a new phenomenon early visitors to the Egyptian pyramids, 1850s to the 1950s mass domestic tourism was the norm. After Second World War charter flights started operations from UK to Mediterranean area and international tourism start increased. 1930s car ownership was start traveling across Europe and North America. If the mid-19<sup>th</sup> century was the age of the train, mid-20<sup>th</sup> century was the age of plane. The invention of jet aircrafts support tourism to travel comfortably and quickly all around the world. (Harrison, 2001)

Air transport is an essential instrument for the development of tourism. Air transport plays fundamental role in tourism development to the extent that the carriage of tourist to destinations is often only possible by air. Long distance between tourist generating countries and increase in number of short holidays make air transportation indispensable. (Vellas, 2000) The world's economy and the tourism industry need a healthy air transportation system. Without airline passengers, restaurants, hotels, and attractions go empty. It should be obvious

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that tourism could not exist without transportation. Every form of tourism requires transport in one form to other. (Lumsdon and Page, 2004)

More than 1 billion tourist spend more than 1.075 million USD in 2012 worldwide. More than half use air transportation (%52). The number of international tourist 25 million in 1950, 278 million in 1980, 528 million in 1995 and 1.035 in 2012. Many countries promote tourism to increase gross domestic products, and its compounding and related factors as increase employment, tax and local business revenues, improve balance of payments by bringing foreign currency, enhance community infrastructure, and diversify the economic base. (Çela, 2) Especially developing countries like Turkey, the biggest problems are unemployment and lack of foreign exchange, tourism gives opportunity to solve this problem for developing countries. Travel and tourism industry is vital for the world economy. Because of provide employment, tax revenues and development incentives to growing numbers of regional and local economies. Additionally tourism industry serves other industries to supporting business, meetings and convention travel. (Hall and Lew, 2009)

Not only charter and LCC's also scheduled airlines carry large numbers of leisure passengers, the British Civil Aviation Authority (CAA) made a survey about scheduled airline passengers, in United Kingdom in 2005 at 14 airports found that almost 68.6 % were leisure trips. The CAA survey did not distinguish between full service or LCC. A survey of Ryanair passengers found that 37.6% were on leisure trips and 39.3 % visit friends and relatives. (Graham, Papatheodorou and Forsyth, 2008) It means that less than ¼ of passenger fly for business.

According to the European Commission, "the cooperation between low-cost carriers and regions is successful by contributing enormously to regional development. Regions are experiencing increased economic growth in sectors such as tourism and witness the development of small and medium sized enterprises in a wide range of commercial sectors". (Graham, Papatheodorou and Forsyth, 2008)

Airlines can classified as their business model; traditional airlines, LCC, regional airlines and charter airlines. Traditional airlines is give full service between main airports, LCC give service short & medium haul routes with limited service, regional airlines give service between small cities and big cities with regional aircrafts and charter airlines generally fly for tour operators as a transportation part. Last two decades LCC's make bigger their market share in the world. And changing the tourism trends people start make short but few journeys because of really cheap prices to traditional air fares.

Liberalization in airline industry create competitive airline markets in the world. Brings lower fares and change the nature of the industry. Moreover, LCC's get the charter airlines market pie day by day because of cheap ticket prices for travel destinations and change the nature of the product of traditional airlines. The traditional airlines became more travel industry oriented inconsideration of competition LCC low ticket prices. LCC's developed their own market, for short break holidays and operate mostly to regions before no direct flight.

Turkey is middle income country and liberalized last three decades and becoming more service industry. Tourism is one of the important industry since early 1980s. Most of the tourist come via air for leisure holiday by plane from Europe, Russia and other countries by plane. The airline industry grew rapidly because of international liberalization, airline expansion strategy, airport

capacity investment, domestic deregulation: low cost carrier development, government support for all airlines (especially flag carrier), growing consumer demand and low-cost carrier development. ([http://dspace.mit.edu/bitstream/handle/1721.1/66250/lshutkina\\_ICAT-2009-2.pdf?sequence=1](http://dspace.mit.edu/bitstream/handle/1721.1/66250/lshutkina_ICAT-2009-2.pdf?sequence=1))

One of the most important part of the tourism is transportation. Transportation is highest importance because it make the bridge to the tourism demand between the points of origin to destination. Air transport and tourism are together travel and tourism is one of the major industries in the world. (<https://ore.exeter.ac.uk/repository/handle/10036/69019>) Over 58 million people are employed worldwide in aviation related tourism. Tourism provided more than 101 million jobs globally 3.4% of total employment. It is estimated that in 2024 this number is reached 347 million. Globally 52% of international tourist travel by air. (ATAG) Tourism especially international tourism grown rapidly because of the cost of air travel cheaper and the travel restrictions (like Russia, China, and Vietnam etc.) stopped many countries in the world. LCCs significant impact on tourism, because of offer low fares for leisure travelers. This low fares allow travelers spent weekend foreign countries or short term visit to another place. LCC's are also affecting the development of secondary destinations (less well known) (Dwyer and others, 2010).

**2. Turkish Tourism Industry Outlook**

Tourism is one of fundamental industries for Turkish economy. Tourism investment start early 80's and after these date growth is continuously. At the present Turkey is the top 10 countries in the world by the number of tourist and the 12th by the number of yield. Almost 36 million tourist visited Turkey and spend almost 26 billion USD in 2012. This represent for Turkish %17 of export (152 billion USD) in 2012 ([www.tuik.gov.tr](http://www.tuik.gov.tr)).

Table 1. Top 10 Countries International Tourist Arrivals and Revenues 2012

Rank	Million	States	Billion USD	Rank
1	83.0	France	53.7	3
2	67.0	United States	126.2	1
3	57.7	China	50.0	4
4	57.7	Spain	55.9	2
5	46.4	Italy	41.2	5
6	35.7	TURKEY	25.7	12
7	30.4	Germany	38.1	7
8	29.3	United Kingdom	36.4	8
9	25.7	Russian Federation	11.2	27
10	25.0	Malaysia	19.7	12

Source: UNWTO (compiled by the authors)

For Turkish tourism Europe share is the biggest and important, more than 50% of the tourist coming from Europe (mostly Germany, England and Holland). Former Russian Federations share is 20% around 7 million and 50% is from Russia. These two market is represent 2/3 of the market in Turkey and only 3-4 hours away (air transportation) from Turkey. And around 2/3 of

them visit 3 regions in Turkey (Antalya, Istanbul and Mugla) and almost all prefer air transportation.

Available Turkish data up to 1970's and these date the number of beds in Turkey around 55 thousand. After 1983 Turkish government give priority to tourism and aviation accordingly and the tourism industry getting bigger day by day. And at the end of the 2012 the number of beds approach almost 1 million in Turkey. (Figure 1)

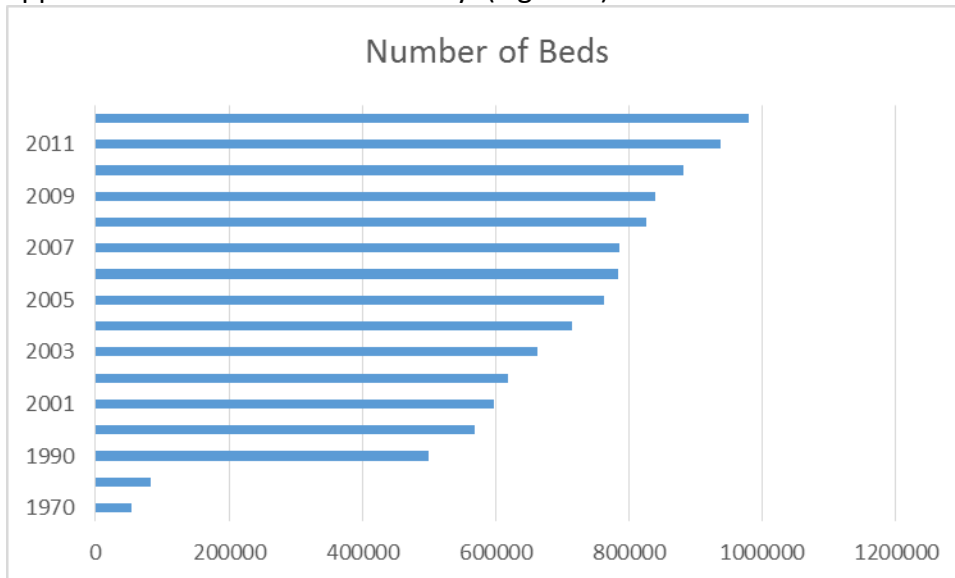


Figure 1. The number of beds in Turkey 1970-2012

Source: <http://www.tursab.org.tr/tr/istatistikler/turistik-tesis-ve-isletmeler> (compiled by the authors)

Turkey derives value from many sub-segment of tourism, from golf tourism, mountain resorts, winter sports, sun and sea tourism, culture tourism, religion tourism, eco-tourism, healthcare tourism, spa tourism.

Table 2. 2003-2012 Number of tourist, tourism income and average revenue in Turkey

Year	Tourism Income ( 1000 \$ )	Number of Tourist	Average Revenue (\$)
2003	13 854 866	16 302 053	850
2004	17 076 606	20 262 640	843
2005	20 322 112	24 124 501	842
2006	18 593 951	23 148 669	803
2007	20 942 500	27 214 988	770
2008	25 415 067	30 979 979	820
2009	25 064 482	32 006 149	783
2010	24 930 997	33 027 943	755
2011	28 115 692	36 151 328	778
2012	29 007 003	36 463 921	795

Source: [http://www.tursab.org.tr/tr/istatistikler/turist-sayisi-ve-turizm-geliri/2003-gelirsayi-ve-ortalama-harcama\\_68.html](http://www.tursab.org.tr/tr/istatistikler/turist-sayisi-ve-turizm-geliri/2003-gelirsayi-ve-ortalama-harcama_68.html)

Table 2 show the number of tourist income and number and average revenue from tourist 2003-2012. And the average revenue is around 850 \$ to 795 \$ by the years. Ratio of tourism receipts to GNP, export and foreign trade deficit is 3.7%, 19.2% and 33% respectively in Turkey 2012. The number of employee is more than 1.2 million for the same year. (AKTOB Tourism Statistics March 2014) The numbers of UNWTC and Turkish statistics has some differences because of calculations. (The number of tourist 36.4 million 35.7 million, and the revenues 29 billion to 25.7 billion).

### 3. Concept of Low Cost Carriers

A low-cost carrier (LCC) or low-cost airline—also known as a no-frills, discount, or budget airline— is an airline that offers generally low fares by eliminating many traditional passenger services. This concept, experienced first in the United States with Pacific Southwest Airlines in the early 1950s, gave birth to one of the biggest success stories of the last 20 years in the air travel industry. (Goeldner and Ritchie, 2012) Southwest Airlines which is the biggest LCCs success story and models for the World start operations 1971 and then Europe early 1990s Irish Ryanair (biggest LCC in Europe) follow this model. After 1995 British Easyjet (second largest LCC in Europe) start operation thought Europe. Many countries liberalized their markets (domestic and international), after US domestic airline deregulation in 1978.

LCC's product is simple, "just" flight service nothing more. If you have luggage, you pay extra, if you want to drink or eat something you must pay. Key characteristics of LCC's (Page, 2009)

- One way ticket fares
- No frills
- One class cabin

- No pre-assigned seating
- Online booking
- Short turnaround time
- Point to point flights
- Lower staffing costs
- Flexibility in staff roster
- One aircraft type
- Innovation
- Multi-skilled staff
- Narrower seating
- Small administrative staff
- Limited office space airports
- Outsource many airline functions (maintenance, ground services, catering, etc..)

LCCs have revolutionized the air transport industry. Because of grandfather rights and slot allocation problem at hub airports LCC's generally use secondary airports and can turn around times reduction is up to 20-25 minutes. LCC's service millions of passenger around the World and market share is %25-30 in Europe and North America. Southwest carry more than 115 million, Ryanair 81 million, easyjet 61 million passengers in 2013. (Related airlines web sites) LCC's make airline industry (and related industries tourism) bigger, stimulate demand, fly people probably do not fly or use other mode of transport. The biggest impact of LCC's is create their own demand, expand the market, probably the most impressive development after the invention of the jet aircrafts. A survey made by European Low Fares Associations data show that 59% of passengers of LCC, are the people who creating new demand and 71% of them state that in other circumstances they would not have traveled at all. (Olipra, 2012)

Prior to liberalization in Europe leisure travelers relied on charter services to access many vacation destinations. More than 40% of all air passengers in Europe were carried by charter airlines (Barrett, 2004). After liberalization, the charter services were replaced in many routes with scheduled services by the low-cost carriers. LCC's implication for tourism is for scheduled flight traffic distribution throughout the year, cheap fares increase leisure traffic and for secondary or regional airports allows new tourism destinations. (<https://ore.exeter.ac.uk/repository/handle/10036/69019>)

#### LCC's in Turkey

First commercial flight made in 1933 in Turkey from State Airlines (Turkish Airlines-THY) the fleet was just 5 planes. Until 80's THY major and only player in the market. After 1983 give right to operate private airlines in Turkey, charter airlines start operation between Western Europe and Turkish seaside destinations in Mediterranean and Aegean. Charter airlines was the first low cost airlines in Turkey before 2002. But this low cost prices only for tour operators. And only in international routes. After 2002 second part of airline deregulation was give rights airline to operate without any limitation. After all some Turkish airlines change business model charter to low cost, traditional airline (THY) set own brand Anadolujet as a low cost operations.

These two carriers offer low fares almost %50-75 low price than before deregulation in domestic and international routes.

Pegasus began operations in 1989 as a charter airlines. Another group bought in 2005 and start operations as a LCC in 2005. Pegasus is the second biggest airline in Turkey, more than 50 planes, operates 30 domestic, 45 international routes. Istanbul second airport (Sabiha Gökçen International Airport-SAW) is the hub of Pegasus. Istanbul which is population much more than many European countries (more than 14 millions) is the only city situated two continent and traditionally heart of history, art, trade and industry.

Figure 2 show that Pegasus Airlines makes connection between biggest cities in Turkey and Istanbul. For their operations use second airport of Istanbul Asia side which is almost no one use before Pegasus and easy to find slots and not congested like Istanbul Ataturk Airport.

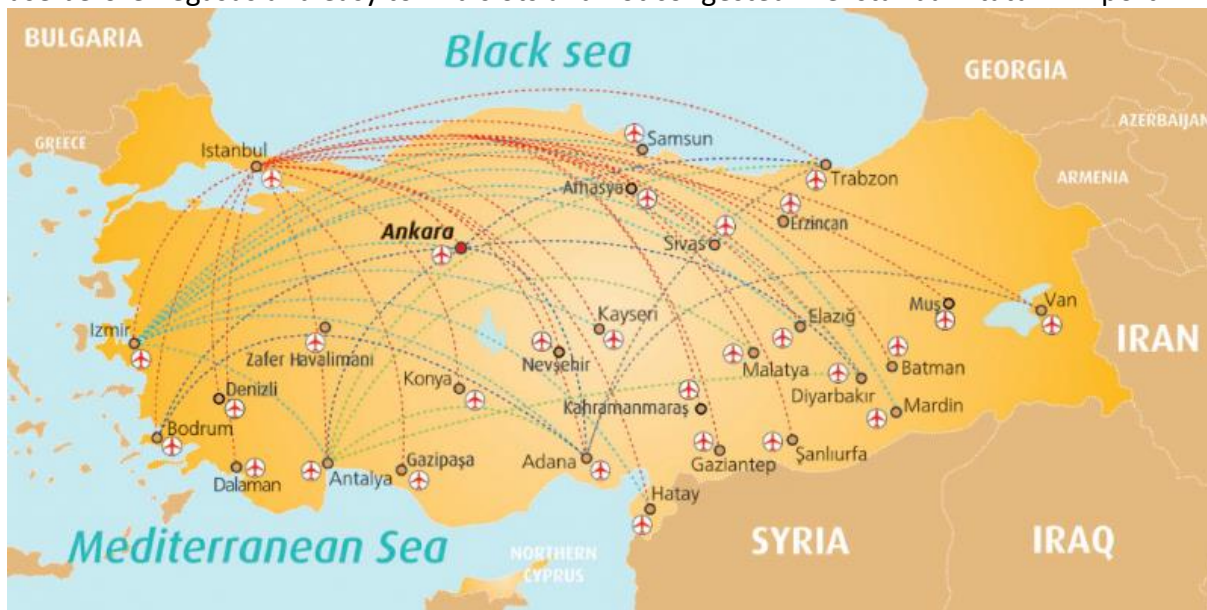


Figure 2. Pegasus Airlines Domestic Routes

<http://centreforaviation.com/analysis/pegasus-airlines-a-true-lcc-growing-traffic-and-earnings-at-a-winged-gallop-108939>

Pegasus international flights mostly to Western Europe which is traditionally heart of travel industry and millions of Turkish native work force who live Europe. Also Ukraine, Russian Federation, Middle East and Asia.



Figure 3. Pegasus Airlines International Routes

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Anadolujet is established 2008 as a THY subsidiary and hub is the capital of Turkey- Ankara. Operates around 30 B737 and fly 28 domestic, 12 international routes. Anadolujet use Ankara as a hub to allow flight from east to west or north to south via air. International routes is Western European cities which enough demand for operation from Ankara.

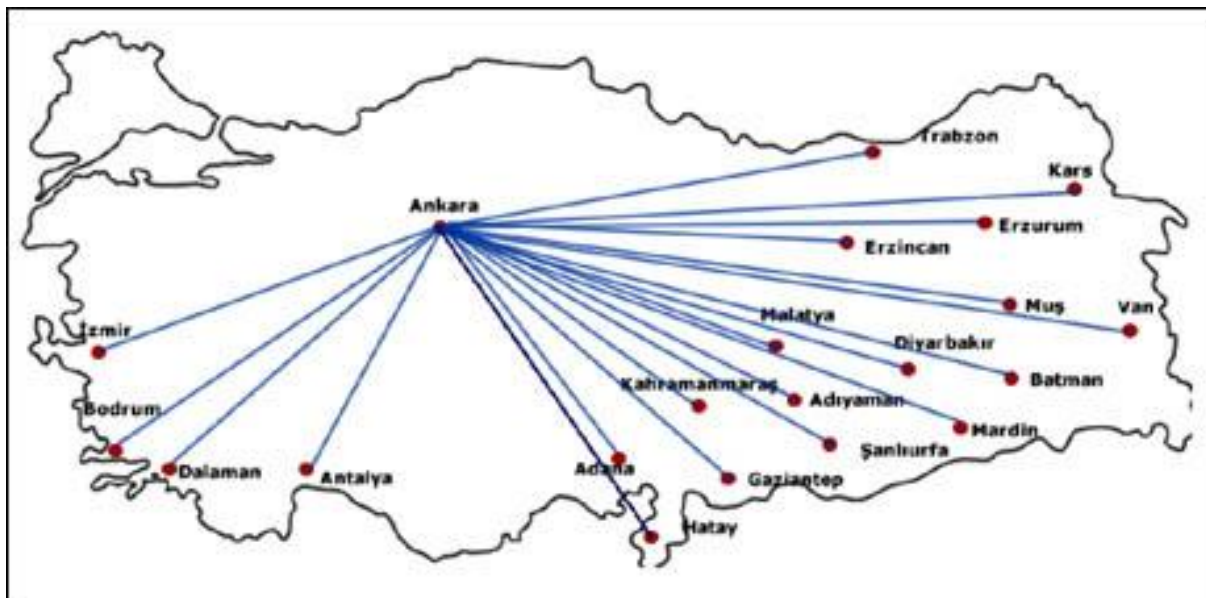


Figure 4. Anadolujet Domestic Flights

<http://wowturkey.com/forum/viewtopic.php?t=54841>



Table 3 give some information about Pegasus and Anadolujet. Pegasus launch 1990 as a charter airlines, after sold another group change business model and became a LCC, make deal to buy new aircrafts and extent their route networks day by day. Anadolujet is subsidiary of THY founded to operate as a LCC and operate between capital of Turkey to rest of Anatolia. Both Pegasus and Anadolujet operates B737 type aircrafts. These two LCC's carried around 19 million passengers in 2012.

Table 3: Turkish base LCC's data in 2012

	Base	Launch	Fleet	Number of Routes (Dom-Int.)	Passengers (mil)
Pegasus	Istanbul-SAW	1990	45	28-45	13.6
AnadoluJet	Ankara-ESB	2008	27	28-12	5.3

Source: airlines web sites (compiled by the authors)

Also foreign LCC's operates to Turkey. The LCC's operates from Europe to Turkey are Wizzair, airbaltic, easyjet, germanwings, transavia, Blu-express, jet2, Middle east and North Africa to Turkey are nasair, flydubai and air Airabia. They carried almost 1.8 million passengers mostly Mediterranean cast of Turkey (Antalya, Izmir, Dalaman, Bodrum) or Istanbul.

Table 4. Foreign LCC's operate to Turkey in 2012.

Airline	From (Country)	To (airport)	Number of Passenger
airarabia UAE	UAE	Saw	68.340
airarabia Morocco	Morocco	Saw	43.781
airbaltic	Latvia	ist, ayt	90.922
Blue Panorama	Italy	adb, dlm, bju, saw	35.894
easyjet Switzerland	Switzerland	Saw	82.899
easyjet GB	GB	Saw, dlm, ayt, adb, esb	439.577
germanwings	Germany	Esb, adb, ayt, txx, szf, saw	201.221
Jet2.com	GB	Dlm, bju	165.345
nasair	Saudi Arabia	Saw	41.663
Transavia Dutch	Holland	Ayt, gzp, saw, adb, bju, dlm	552.395
Wizzair Ukraine	Ukraine	Ayt	20.423
TOTAL			1.742.460

Source: State Airport Authority 2012 Statistical Yearbook (compiled by the authors).

Almost 1.8 million people carried from foreign LCC's from Europe and Middle East Regions to Turkey in 2012. These flights are mostly Istanbul and Turkish seaside destinations. UAE, Morocco and Saudi Arabian airlines flight is only Istanbul and their passenger number is less

than 10% of all LCC's passenger number from foreign LCC's to Turkey. The biggest proportion is Europe almost 90%.

Both Turkish and foreign LCC's carried more than 20 million passenger in 2012. They mostly operated new routes and play important role for Turkish aviation industry.

Turkish LCC's operates domestic and international flights. Pegasus Airlines base is in Istanbul second airport, Anadolujet base is capital of Turkey Ankara. They both make international flights but Pegasus flights much more than Anadolujet because of advantage of Istanbul (population, trade, history, tourism, etc.) and the role given by THY to Anadolujet. Even shown in ICAO catalog Onurair, Atlasjet, Sunexpress and Corendon Airlines not have many of LCC's characters. (<http://www.icao.int/sustainability/Documents/LCC-List.pdf>)

#### **4. Effect of LCC's on Turkish Tourism**

The LCC's offer point to point flights and cheap price for passengers. Mostly do not bundle service with hotels and give service for short break (3-4 days) tourism. The LCC's mostly used by independent travelers who do not stay all inclusive hotels, visit around, eat restaurant, visit museums, use taxi or bus who spent money for small scale retailer. LCC's also serve the passengers who own properties abroad and do not need accommodation hotel or etc.

Liberalization around the world create LCC's and to design internet has some affect leisure travelers. Bypassing travel agency and global distribution systems (owned by major carriers), a reduction of seasonality (people take shorter and more frequent breaks) and strong belief in the commoditization of the airline product (travelers airlines are basically the same product) the distinction between LCC's and scheduled airlines is blurred surveys made in USA in 2006 and made by IATA in 2007 showed that passengers decide based on the price. (Graham, Papatheodorou and Forsyth, 2008) The internet give passengers of LCC's to check price and see options for many airlines and destination. If the price is affordable passengers can take decision flying even if there is no idea about visit any place.

The impact of airline deregulation in Turkey is impressive the number of passenger from 34.5m to 131m. LCC's started operation after 2005 and in 2012 carry almost 20m passengers due to many difficulties from industry. LCC's passengers spent millions of bed nights and added output Turkish economy billions of dollars. It is estimated that average spend for tourist around 800 dollars in Turkey in 2012. 1.8m passengers carried by only foreign LCC's, it means that LCC's related revenue is about billions for Turkish economy.

The emergence of LCC's had big impact for the development of tourism in the world like Turkey. LCC's with cheap price (against traditional airlines) and increase additional seats for the industry. The Turkish Civil Aviation Authority (TCAA) data show us that between 2003 and 2012 the number of passengers from 34.5 m to 131m. almost 3 times, Domestic passenger number is 9.2m to 64.7m. more than 6 times growth. International passenger number for same period 25.3m to 65.7m. almost 2 times. This massive growth about liberalization of air transportation industry in end of 2002 in Turkey. This massive growth of passenger number maybe the biggest impact is emergence of LCC's in Turkey. Because of the affordable prices and bring competition to the market as a result market get bigger day by day. 74 % of tourist visit Turkey via air transportation in 2012. (<https://twitter.com/SHGM>)

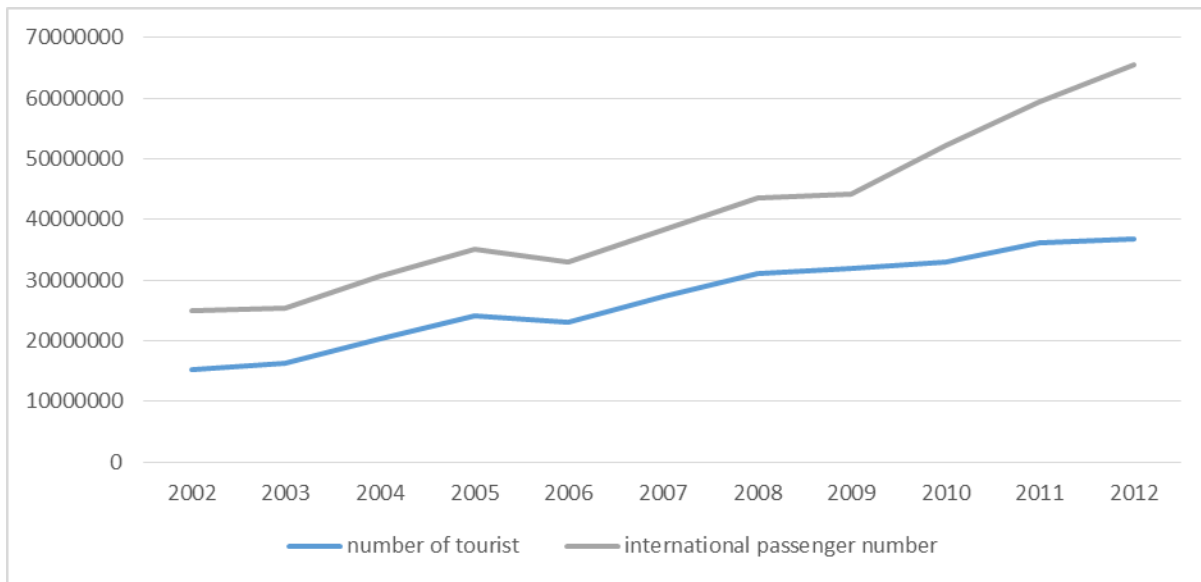


Figure 5. Relation between number of tourist and international passenger number 2002-2012

LCC's also big impact for domestic tourism in Turkey. Many cities in away from big cities in Turkey has dramatic touristic number increase. For example, the number of tourist increase 30 thousand to more than 1 million 2002 to 2012 in Mardin (southeast of Turkey). (<http://www.dha.com.tr>) during the same period the number of domestic passenger number 20 thousands to more than 3 million in Mardin Airport. ([www.dhmi.gov.tr](http://www.dhmi.gov.tr) State Airport Authority Statistics)

### Conclusion

LCC's impact air travel growth to create more competitive environment for air travel. LCCs have been one of the most significant developments in air travel in this century and change the way that people travel not only in terms of carriers, but in terms of the mode of transport and where they travel from. (Boniface and Cooper, 2009)

It's clear that LCCs positively influence travel industry between Turkey and neighbor regions and help them to increase of number of tourist. Low fares attract people, stimulate demand and mutual benefits of where they operate. In domestic routes LCCs influence the tourism in smaller and remote cities from big cities. International routes more oriented tourism and operation mostly from Europe, Ukraine and Russia.

LCC's entered the market after 2002 in Turkey and change the nature of product of traditional airlines and charter airlines. Some charter airlines started ticket sale via internet (Corendon Airlines), traditional airline reduces prices and became more cost oriented. LCC's create their own market with their cheap ticket price and change the way of tourism culture one long (7-14 days) holiday to short breaks (3-4 days) holidays. Some charter airlines return to low cost airlines in Turkey. LCCs not serve only sea side destinations like charters or serve between big cities like traditional airlines, LCC's operate where they see any potential demand.

LCC's is able to regulate ticket price to travel destinations, because traditional airlines follow LCC's ticket price continuously. Not only charter airlines give service for tourism industry but

also full service carriers like LCC's give service travel industry. But LCC's difference is give discount price and "stimulate demand". The ticket prices nearly 50% discount contrast FCCs same routes. And FSC's sometimes reduce prices some routes. Charter airlines support low fares only for tour operators who bundle the holiday (hotel, transport, etc.) not directly passengers mostly.

LCC's operations mostly new city pairs in Turkey, it means new tourists, new destinations, etc. for example before Pegasus Airlines start to operate Lviv in Ukraine from Istanbul, and there were no direct flight between these cities. Or before Wizzair there is no direct scheduled flight between Kiev to Antalya.

LCC's especially operates summer season like charter airlines but also operates rest of the year and support tourist whole year for tourism industry. LCC's support growth both domestic and international tourism in Turkey by via offer affordable prices.

LCC's offer impressive prices like (29-39-49 Euros as a dinner price) and people who do not has any plan for travel or going abroad because of this impressive prices start make holiday plan. And became tourist. And because of this impressive prices people sometimes visit the cities never heard before.

LCC's passengers not like charter passengers, charter passengers mostly buy a tour and because of all-inclusive hotels do not want to go out. But LCC's passenger's short term visits, online booking for hotels, not as a package tour including all. Use taxi, eat out, go clubs and restaurants, etc. spend money to small scale retailer who is important for economies.

LCC's transport millions of people in domestic routes and improve domestic tourism. Because of this improvement more than hundreds hotels opened in small cities of Anatolia. This also help one of the biggest problem in Turkey which "revenue differences between regions" and "go work to big cities in Turkey". Each year hundred thousands of people move from east to west Anatolia to find a job.

LCC's give service more than 20 million people passengers in 2012 in Turkey. Maybe the most important one is LCC's do not capture traditional airlines passengers they create their own market. Maybe these 20 million passengers did not travel or did not use air transportation if LCC's did not serve these markets. LCC's big opportunities for developing countries like Turkey, because of foreign money needs and support employment. In 2012 the average expenditure for foreign visitors is around 800 USD. Millions of tourist visit Turkey via LCC's and it is estimated that LCC's brings billions USD for Turkish economy without any additional investment.

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