INTERNATIONAL TOURISM: MODERN TRENDS, MODELS AND PROCESSES

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Abstract

In a world and travel universe subject to continuous change, the tourism phenomenon is under ever greater pressure to evolve and respond to the world it inhabits - in order to survive. The object of the paper is to discuss and analyze, some of the important issues and trends relating to tourism phenomenon. In particular, ways in which the tourism and its consumers are being affected and affecting these trends. The first two sections deploy elements of a steep analysis in order to detect significant demographic and macro political forces affecting tourism phenomenon. Section three considers the "day-to-day…sphere" of travel and tourism, its 'microenvironment', the competition and markets forces they encounter there. The paper reviews one of the most significant micro trends affecting the airline sector: the dynamic growth of low cost carriers. The last part of this work looks into strategic and analytic models associated with tourism, highlighting some of the strategic directional trends being adapted to tourism sectors and into new collaborative forms of social media, communications and marketing.

Keywords: tourism, macro/micro trends, development models.

TURISMO INTERNACIONAL: TENDÊNCIAS MODERNAS, MODELOS E PROCESSOS

Resumo

Em um mundo e universo de viagens sujeitos a mudanças contínuas, o fenômeno do turismo está sob pressão cada vez maior para evoluir e responder a estas transformações. O objetivo do artigo é discutir e analisar algumas das questões e tendências importantes relacionadas ao fenômeno do turismo. Em particular, maneiras pelas quais o turismo e seus consumidores estão sendo afetados e afetam essas tendências. As duas primeiras seções abordam elementos de uma *steep* análise acentuada para detectar importantes forças demográficas e macro-políticas que afetam o fenômeno do turismo. A seção três considera a "esfera do dia-a-dia ... " de viagens e turismo, seu "microambiente", a competição e as forças de mercado que se encontram. O artigo analisa uma das micro-tendências mais significativas que afetam o setor aéreo: o crescimento dinâmico das operadoras de baixo custo. A última parte deste trabalho aborda os modelos estratégicos e analíticos associados ao turismo, destacando algumas das tendências direcionais estratégicas sendo adaptadas para o setor do turismo e às novas formas colaborativas das redes sociais, comunicação e marketing.

Palavras-chave: turismo, macro / micro tendências, modelos de desenvolvimento.

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TURISMO INTERNACIONAL: TENDENCIAS MODERNAS, MODELOS Y PROCESSOS

Resumen

En un universo mundial y de viajes sujeto a continuos cambios, el fenómeno del turismo está bajo una presión cada vez mayor para evolucionar y responder al mundo en el que habita, para poder sobrevivir. El objetivo del documento es discutir y analizar algunos de los temas y tendencias importantes relacionados con el fenómeno turístico. En particular, las formas en que el turismo y sus consumidores se ven afectados y afectan estas tendencias. Las dos primeras secciones despliegan elementos de un análisis profundo para detectar importantes fuerzas demográficas y macro-políticas que afectan el turismo. La tercera sección considera la "esfera del día a día" de los viajes y el turismo, su "microambiente", la competición y las fuerzas de los mercados que encuentran allí. El documento revisa una de las micro-tendencias más importantes que afectan al sector de las aerolíneas: el crecimiento dinámico de las aerolíneas de bajo costo. La última parte de este trabajo analiza los modelos estratégicos y analíticos asociados con el turismo, destacando algunas de las tendencias direccionales estratégicas que se están adaptando a los sectores del turismo y a las nuevas formas colaborativas de las redes sociales, las comunicaciones y el marketing.

Palabras-clave: turismo, macro / micro tendencias, modelos de desarrollo.

INTRODUCTION

Changing demographic trends are one of the key external factors continuing to shape travel related industries. Forecasts suggest a rise from around 7 billion to around 8.3 billion people in 2030. In particular Asia and the Americas seem set to rise strongly, 18% and 17% respectively between 2009 and 2030. Although the distribution of the global population will remain largely static in proportional terms, growth will be unevenly distributed (World Tourism Organization, 2010).

In the first section this paper looks at some key demographic trends set to reconfigure the global tourism map. Arguably, one of the most important politico-economic trends influencing international tourism has been, the super trend towards international regulatory liberalization and deregulation. In order to gain insight into recent trends in the critical air transportation sector a macro political analysis is adopted. This macro political environment can be said to include governmental, legal and regulatory influences as well as other areas under the direct/ indirect power, control or influence of governmental authorities. After the EU's eastern enlargement in 2004 there was no fewer than 20 low cost carriers (LCCs), offering 'cheap tickets' via "short and middle-haul" routes - connecting continental cities (GABOR, 2010, p.53). Between the EU expansion and implementation of the 'Single

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European Sky' between 2004 and 2009, the market supply of LCCs experienced a trend of dynamic expansion, as indeed did, their geographical distribution, becoming much "more diverse" (GABOR, 2010, p. 53). Through using a network analysis technique, the intentions below is to discern some of operative trends within this critical micro sphere of the tourism business. At the business development level a number of trends can also be observed in relation to the strategic options being deployed by travel operators.

This paper looks firstly at some of the more general theoretical trends informing managers' strategic decisions. Models which take into account factors from, core competences, to the risk continuum, market penetration, product development and a variety of forms of dynamic diversification. The manner in which these consideration have been apply will then be considered in order to better understand why tourism companies chose different models and strategic directions. While internal development remains important for many companies in travel related industries (e.g. airlines, hotels), they are increasingly integrating 'collaborative models' into their strategic plans. A major shift in international business and the tourism sector, has arguably been the trend from competitive to collaborative business strategies. Perhaps none more so that 'strategic alliances', between companies in both complementary and competing sectors. Consideration is given to the permanency of this trend. As mentioned above, some of the changes in the tourism has been the trend towards increased use of collaborative system models, but equally important is the integration of new digital technologies in the value chain and marketing processes.

The final section concludes with a look at these new trends as they relates to customer behavior, taste formation and product design. Highlighting various important conceptual trends affecting both marketing departments, but also consumers' themselves - embedded in social networks.

TOURISM MACRO TREND (A) - SOCIAL

Growing and ageing populations

Macro meaning the "broad environment outside of an organization's industry" (EVANS *et al.*, 2003, p.156). Perhaps one of the most significant factors will be the interrelated global shifts in life expectancy/fertility, in conjunction with an ageing global population trend (e.g. Western Europe, North America, Japan, and Russia). Not only is there a growth in older tourists, but they will increasingly live longer, retain higher than average

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levels of disposable income, while being healthy and "younger looking in outlook" (WORLD TOURISM ORGANIZATION AND EUROPEAN TRAVEL COMMISSION, 2010, p.4)[2]. While continued population growth presents great opportunities for the tourism business, generating a significant expansion in out of country travel, other demographic changes look set to present significant challenges, impacting not only upon the kind of tourists travelling, but their domiciled departure location, the places they visit, the kind of lodgings they desire, as well as, the type of activities they engage in whilst travelling.

Socio-structural changes

Demographic changes can also be seen in alterations in family structure and household composition, especially in developed nations. Sociologists have described a shift from the 'horizontal' to the 'vertical' family, with many members of the same generation, to a more equal spread across the age groups (WORLD TOURISM ORGANIZATION AND EUROPEAN TRAVEL COMMISSION, 2010). Tourism will be required to adapt itself to offer more creatively packaged and variegated services, catering for example, from single travelers to multi-generational travel parties. While such socio-structural changes present potentially attractive new customer segments. For example, the trend towards changes in 'seasonality' of the traditional vacation markets, with older tourists having more free time accompanied by disposable incomes, and the wish to try new activities and locations.

Population locations

Another important global trend is that of 'urbanization', and with it the growth of tourism. Mason appropriately notes that "modern tourism developed largely as a result of urbanization in Western Europe" (MASON, 2003, p. 12-13). This trend remains an integrative characteristic in the age of globalization. Indeed, the population of the world is set to continue becoming ever more urbanized in coming decades. The World Tourism Organization (WTO) forecasts that by 2030 Asia itself will "account for 60% of the world's population", with China closely followed by India each supplying just under 20% each (WORLD TOURISM ORGANIZATION AND EUROPEAN TRAVEL COMMISSION, 2010, p. 5).

For the first time in human history more than 50% of the world population now live as urbanites in small to mega cities. If this trend continues in developing societies, particularly

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[2] See also Ryan and Trauer (2005).

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nations with large populations and growing economic power, such as China, India, Indonesia and Brazil, the concentration of the global tourism map looks set to change with it. Leaving such nations set to develop into some of "the world's largest producers of international tourists" (WORLD TOURISM ORGANIZATION AND EUROPEAN TRAVEL COMMISSION, p. 2010: 5).

These demographic trends will have important implications for global tourism markets, as the World Tourism organization acknowledges. For example, large numbers of these new Chinese tourists' will be around 16-35, both with aspirations to purchase travel goods and services, as well as the disposable incomes with which to do it (WORLD TOURISM ORGANIZATION AND EUROPEAN TRAVEL COMMISSION, 2010).

TOURISM MACRO TREND (B) - POLITICAL

Regulation and Liberalization of Air Space

In this section we continue with a macro analysis of another important trend in business and tourism operations. The macro political environment is usefully delineated as follows: *legislation and regulation*, *economic policy*, *government-owned businesses* (e.g. airlines) and *government international policy* (EVANS *et al.,* 2003). This environment will also include some element of *political risk.* Travel and tourism businesses can be particularly prone to adverse financial and reputational outcomes, as a result of socio-political instabilities in international travel business locations (EVANS *et al.,* 2003).

The political environment of international air transportation since the end of the 2nd World War was warily regulated via thousands of bilateral agreements between partner nation governments (BUTTON, 2009 *apud* GABOR, 2010). Many dating back to the Chicago Convention of 1944 and the Bermuda Agreement of 1946. Founded upon the basic recognition of the "sovereignty of nations over their airspace", and "equal right for every nation to participate in air travel," (five freedoms of the air) (EVANS *et al.,* 2003, p. 166).

These agreements were subsequently followed by a complex maze of bilateral inter-governmental agreements which enabled the government stakeholders involved, the ability to preserve control over their perceived national interests relating to air travel. However, more recently this control has been weakened as the same governments embraced the concept of 'open skies', reflecting a "development of major importance for the airline industry: liberalization unfolding around the globe" (EVANS *et al.,* 2003, p. 166).

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The liberalization and deregulation trend commenced in the late 1970's with the passing of the Airline Deregulation Act (1978). The European Union followed within ten years, phasing in three radical liberalization packages for the aviation sector in 1987, 1990 and 1993 (PENDER and SHARPLEY, 2005). Notably, as Pender and Sharpley (2005, p.38) suggest, these changes left the EU regulatory environment "even more liberal" than that of the USA. Most significantly the international airline environment was changed to a new 'mixed market' which included public, semi-public and private carriers - now in direct competition for market share.

Figure 1: Development of demand for Air Travel in the World

Source: International Air Transport Association - IATA (2016)

This new competition lead to the so called 'full service network carriers' (FSNCs) switching their operations from a 'point to point' system, to one of 'hub and spoke' (CENTO, 2009, p. 184 *apud* GABOR, 2010, p. 51),[3] since as Gabor notes "prices became primarily demand-oriented and economies of scale got more and more important" (GABOR, 2010, p.51). In contrast, the LCCs took up the point to point system which allowed them, within the new liberalized environment, to "pick up the price-sensitive market share…[by]…offering cheaper tickets." (GABOR, 2010, p.51).[4] As Gabor correctly notes, "first in North-America, then in Europe and now everywhere in the world", the dynamic growth rates of LCCs are among the "most important achievement of liberalization" (GABOR, 2010, p.51).

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[3] See also WTO (2010, p.8).
[4] See also Gillen, Gados, (2008)

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It is necessary however to acknowledge that heavy regulation concerning airline ownership has not disappeared. Rather, it remains vigorously regulated. In the case of the USA, for example, airlines are still subject to 'substantial national ownership' and/or 'controlling interest' demands. This 'protectionist' measure clearly insulates from international competition, those national carriers servicing domestic and hemispheric routes. However, it does also reflect, the airlines industries perceived strategic significance to US authorities, a point acknowledged by Doganis (2001). Ironically as Evans *et al.* (2003, p.167) goes on to acutely point out, in the USA "most international of industries remains almost exclusively national in terms of ownership and control."[5] Clearly, despite the radical liberalization of air travel regulations in recent decades, air transport remains firmly within the macro political environment of state power. Such ownership restrictions, present a keen counter point, to what has seemed at times a ubiquitous trend in market liberalization over the last 30 years. Particularly given that it's a position taken by the world's most powerful military and trading nation (albeit declining and relatively terms), in addition to, the most ardent and influential state advocate of international liberalization measures. Nevertheless, the liberalization trend in air passenger and cargo travel in recent decades has greatly contributed to the emergence and development of 'airline hubs' and 'collaborative' strategic alliances (WORLD TOURISM ORGANIZATION, 2002, p. 3).

TOURISM MICRO TRENDS: RISE OF EUROPEAN LOW COST CARRIERS (LCCS)

As the transport sector is, as Keith Debbage notes, the "key element" matching "tourist demand (origin) with tourist supply (destination)" (DEBBAGE, in PENDER & SHARPLEY, 2005, p.30), the huge influence of Air transit deregulation in the US and Europe could be seen in both "airlines network structures and business policies", as operations became more "profit oriented due to the free market" (GABOR, 2010, p.51). While the European airline market has been progressively expanding since its emergence having "more than doubled in size since 1990", the most significant growth trends have been "almost entirely fueled by low-cost carriers".

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[5] See also Doganis (2001).

Figure 2: European market share of low-cost carriers
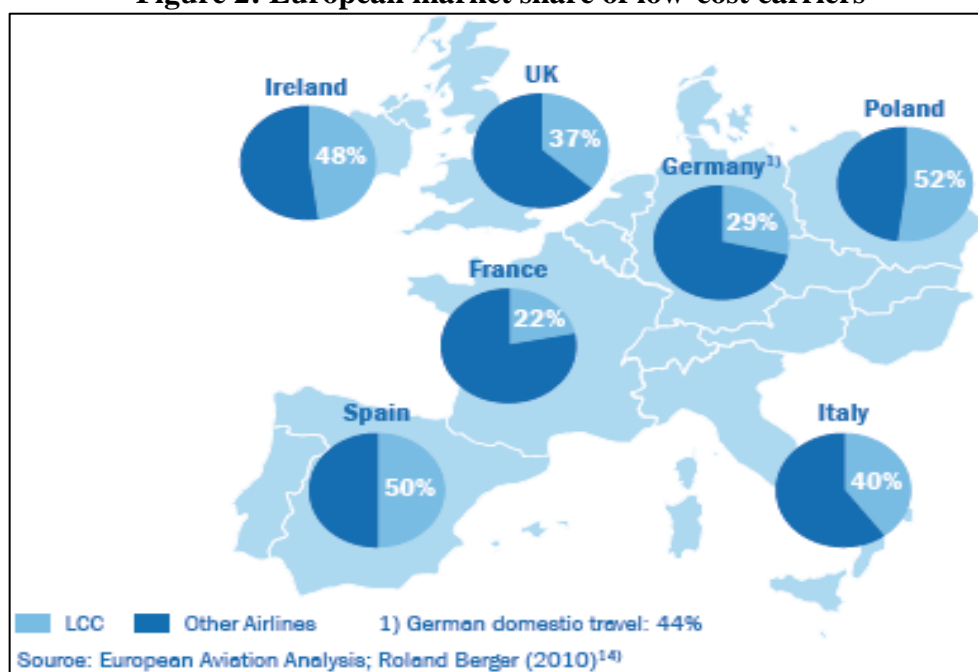
Source: Roland Berger Strategy Consultants, Zurich (2010, p.8).

Companies which are characteristically smaller, leaner and more 'flexible' than the traditional network carriers, helping them to "tap into almost every market within Europe" (BERGER, 2010, p. 3); some core elements of the LCC business model included: low unrestricted fares, high service frequency and point to point service with no interlining.

TABLE (A): European LCC network features

LCC in 2004	Number of Destinations	Number of Routes	Exclusive Routes %	LCC in July 2009	Number of Destinations	Number of Routes	Exclusive Routes %
Alpi Eagles	9	22	27	Aer Lingus	59	88	69
Bmibaby	24	78	59	Blue Air	34	45	87
Deutsche BA	8	26	31	Bmibaby	29	63	51
EasyJet	38	238	65	EasyJet	110	445	79
Flybe	32	111	77	Flybe	56	162	90
Germania	17	54	15	Flyglobespan	20	36	72
Germanwings	32	66	70	Germanwings	66	121	85
Hapag-Lloyd Express	19	42	86	Jet2	48	105	79
Intersky	5	10	100	Monarch	19	49	41
Jet2	13	23	91	Myair	31	50	82
Monarch Scheduled	11	32	31	Norwegian	75	164	95
MyTravel Lite	14	30	60	Ryanair	145	818	93
Norwegian	21	46	35	Sky Europe	33	57	84
Ryanair	84	292	93	Transavia	68	96	91
Sky Europe	9	16	88	TUIfly	70	272	94

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Skynet Airlines	4	6	67	**Vueling**	44	89	81
Sterling	14	42	33	**Windjet**	29	46	93
Virgin Express	15	30	23	**Wizzair**	52	143	88

Source: Gabor, (2010: 57), adapted from Dobruszkes, (2009)

TABLE (B): The original low cost business model as initiated by Southwest Airlines

Product Features	
1. Fares/Network	Low, simple and unrestricted fares, high frequencies, point to point, no interlining
2. Distribution	Travel agents and call centers (today internet sales), ticketless
3. In-flight	Single class, high density seating, no meals or free alcoholic drinks, snacks and light beverages can be purchased, no seat assignment
Operating Features	
1. Fleet	Single type, Boeing 737 types, high utilization, 11-12 hours/day
2. Airport	Secondary or uncongested, 20-30 minute turnarounds
3. Sector length	Short, average 400 nautical miles
4. Staff	Competitive wages, profit sharing, high productivity

Source: Gabor, (2010: 52), adapted from Pate and Beaumont, (2006)

Indeed, since the emergence and strong market growth of LCCs in the 1990s, the "growth trend of established network carriers has stopped," their relative market share decreasing relationally.

TABLE (C): European low-cost supply spread (millions of seats)

	January 2004		January 2008	
West – West	7,89	98%	13,4	83%
West – East	0,14	2%	2,13	13%
East – East	0,01	0%	0,07	0%
West – Other	0,03	0%	0,57	4%
Total	8,08	100%	16,17	100%

Source: Gabor, (2010: 54), adapted from Dobruszkes, (2009)

TABLE (D): European low-cost geographical supply distribution (city-pairs)

	January 2004		January 2008		July 2009	
West – West	512	94%	964	72%	1971	75%
West – East	21	4%	285	21%	399	15%
East – East	2	0%	7	1%	15	1%
West – Other	11	2%	81	6%	241	9%
East - Other					10	0%
Total	546	100%	1336	100%	2636	100%

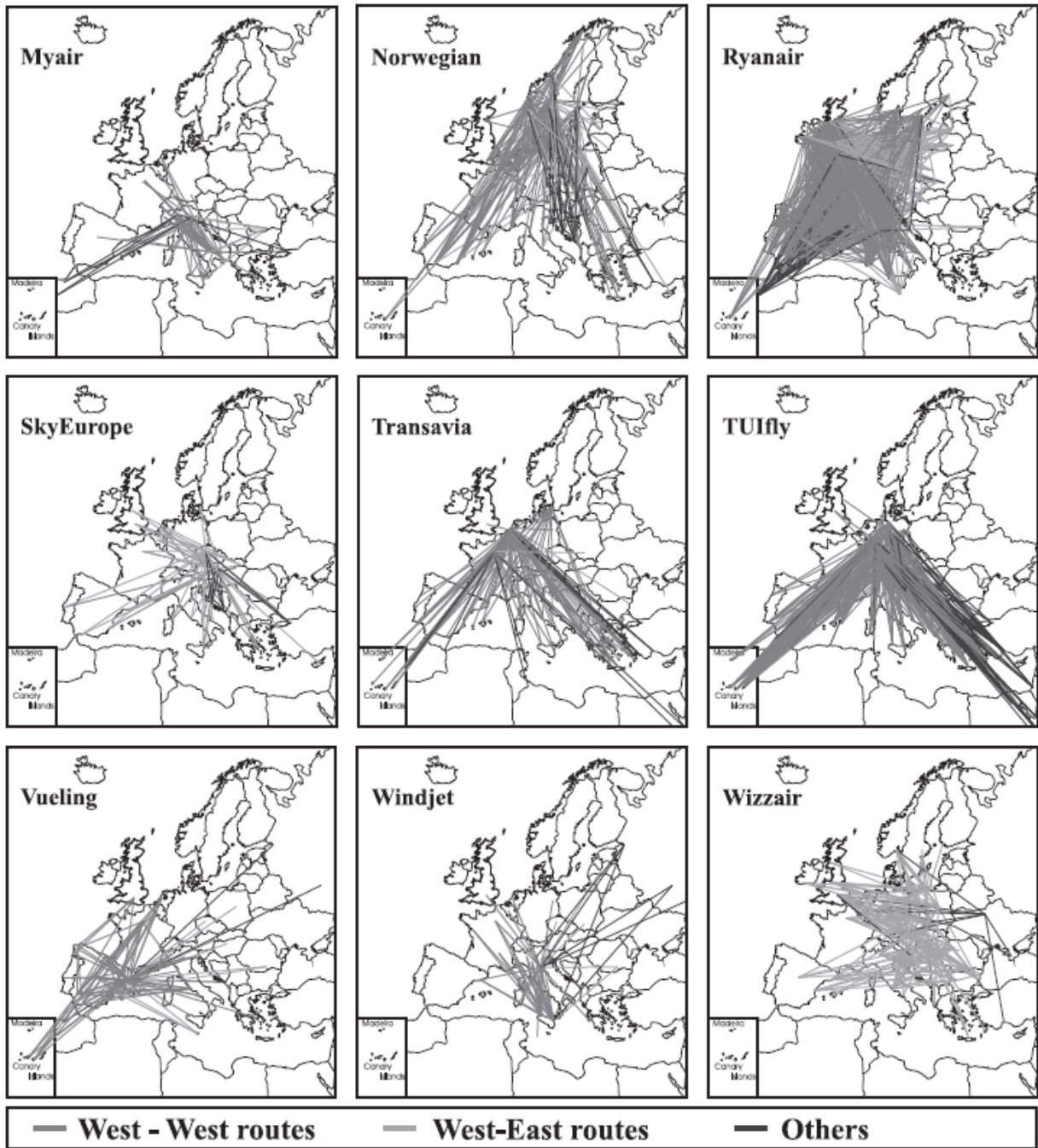Source: Gabor, (2010, p.54), adapted from Dobruszkes, (2009)

In contrast, as industry specialists Roland Berger stated, the fledgling LCCs grew at "high double digit rates", increasing their collective market share from just "5% in 2001 to 32% in 2008" (BERGER, 2010, p.7). Gabor (2010) demonstrates that through an analysis of LCCs routes and schedules, three clear trends emerge. Until 2008 the *number of available seats doubled*; there was a dramatic *increase in destinations*; with a concomitant increase in *route supply* (inc. *new West-East routes).*

Figure 3(a): European low-cost networks (July 2009)

Source: Gabor (2010, p.55)

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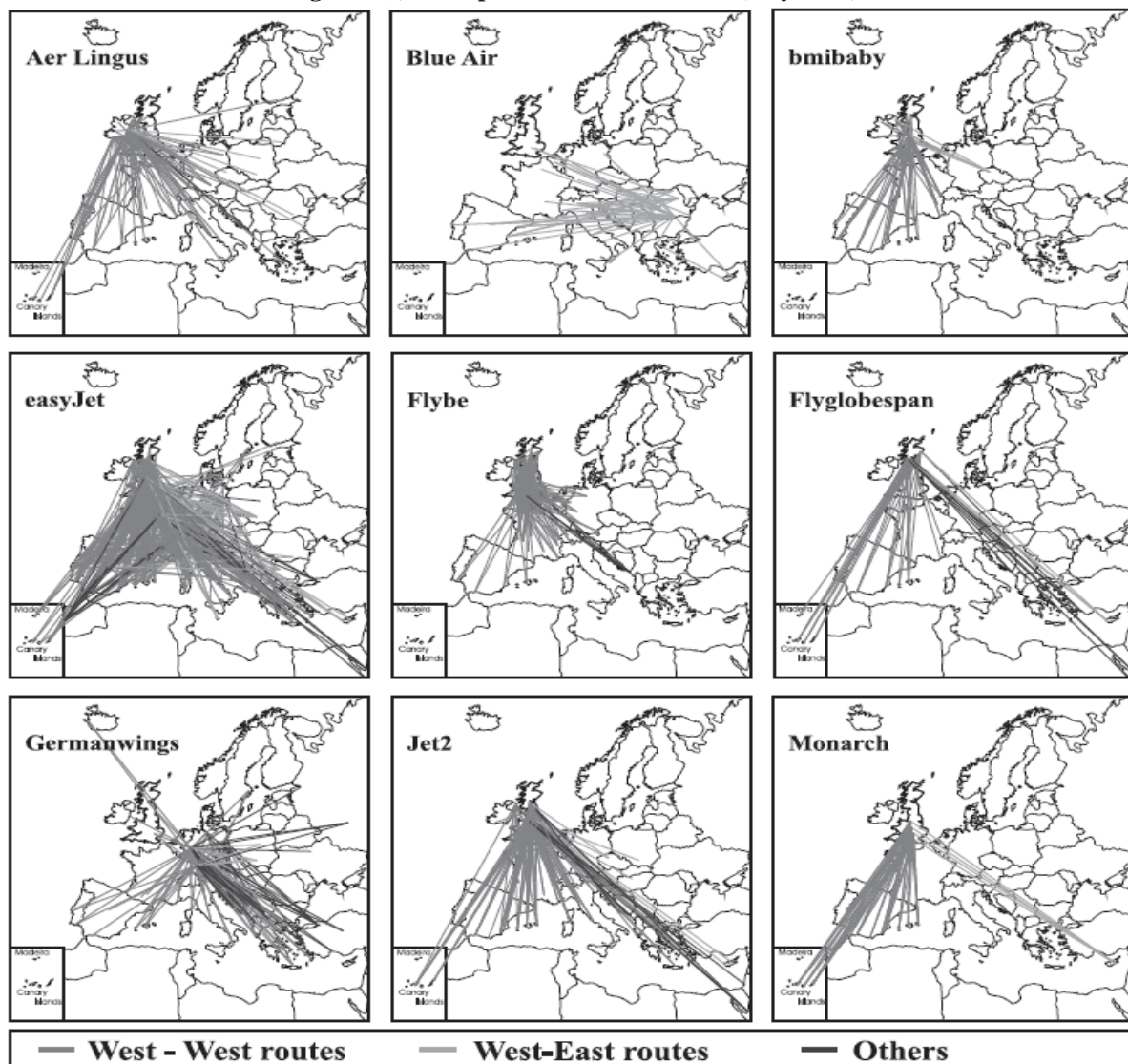
Figure 3(b): European low-cost networks (July 2009)

Source: Gabor, (2010, p.56)

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Dundas Gabor points to important additional catalysts in this respect.

TABLE (E): Catalysts for the spread of low cost carriers

- Deregulated markets
- Entrepreneurs[4]
- Population and relative wealth
- Airport availability/capacity sold cheap and free of congestion to allow intensive operations
- Internet – sales ease, simple tariff, price transparency, circumnavigation of travel agent control of distribution channel

Source: Gabor, (2010: 51), adapted from Francis *et al.*, 2006

One key driver was the severe "downturn in the aviation sector between 2001 and 2003", driven by the 9/11 terror attacks, the war against Iraq and Afghanistan, as well as the SARS outbreaks. Together these and other influences helped fuel great reductions in passenger numbers, in addition to "the income(s) of FSNCs" (GABOR, 2010, p.53). Both legacy carriers and charter carriers responded by launching their own "low-cost" subsidiaries, more than a dozen new LCCs entering the market (DOGANIS 2006, *apud* GABOR, 2010).

Through this important growth driven restructuring of the market, three types of LCC network structure also emerged. Firstly, 'north-south' flows (e.g. Monarch, Transavia, Tui Fly), focused almost entirely on trips to the Mediterranean coasts (e.g. Ibiza, Palma de Mallorca, Crete). The airlines serving this market segment tending to be either subsidiaries of a larger FSNCs, like British Midland's subsidiary bmibaby, or they appear as 'hybrid' LCCs which are partly charter carriers (e.g. TUIfly), but also offer scheduled flights to popular holiday destinations (e.g. Monarch). Secondly 'west-east' flows by companies like Blue Air and Wizzair; with Wizzair for example, concentrating on high demand services between Polish and English cities (GABOR, 2010). Thirdly, 'mixed network structures' (e.g. Ryanair and EasyJet). Arguably these two 'low cost champions' Ryanair and easyJet have lead the European market through taking advantage of what Gabor describes as their "first starter position" in the LCC market - building up an "enormous route network". A point he illustrates by the fact that, these two hybrid champions operate "three times more routes" than their next largest competitor (TUIfly). This position was achieved by offering products/services to both leisure and business travelers. In addition to, both north-south and west-west connections, as well as, a growing number of west-east travel links (GABOR, 2010, p.56).

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The principal difference between the network strategies of these market leaders, has been not so much the service they offer (both offering ancillary service through partner companies in the supply chain), but rather their choice of airport use. Whereas Ryanair services focus around so called 'secondary airports' (e.g. Frankfurt Hann, Glasgow Prestwick), serving leisure costumers. In contrast, easyJet's operational network serves both secondary and primary airports (e.g. London Gatwick, Milano Malpensa), offering more connections for business travel markets focused around large and middle sized city centers (O'CONNELL, WILLIAMS, 2005, *apud* GABOR, 2010).

Gabor's network analysis helps to demonstrate the significant growth trend of LCCs in Europe. The innovative business model adopted by the LCCs, does not rely simply upon high ticket sales as the "primary source of profit". Rather, relying on other ancillary income streams such as: "surcharges, advertisements, car rental, credit card fees, travel insurances..." (GABOR, 2010, p.53). Additionally, LCCs operate with much lower crew expenses than FSNCs. In 2002 the *European Cockpit Association* reported that   pilots working for LCCs receive around 28% less than pilots employed by FSNCs, while delivering around 25% more air time. Whereas the whole crew is expected to handle more operational tasks, such as "flight planning, cleaning the plane, checking fuel levels" and so on (DOBRUSZKES, 2006, *apud* GABOR, 2010, p.53). In a tourism sector where "controlling demand is as important as controlling costs and supplies" (GABOR, 2010, p.53).[6]

Despite the birth and expansion of low-cost airlines was in Europe, this process developed rapidly in other continents, even if in Africa and South America only partly or only in some countries. Following, some tables indicating the nations that have low cost companies in other continents beyond Europe.

TABLE (F): List of the main low cost airlines in North America

Countries of North America	Airlines	Destinations
Canada	Air Transat	Flights within Canada and from Canada to the Caribbean, Europe and the United States of America
Canada	Sunwing Airlines	Flights within Canada and from Canada to Mexico, Central America, the Caribbean and the United States
Canada	WestJet	Flights within Canada and from Canada to the United States, Mexico and the Caribbean
USA	Allegiant Air	Flights within the United States and destinations near Canada
USA	Frontier Airlines	Flights from Denver to various destinations in the United States, Mexico, Costa Rica, Jamaica, Dominican Republic and Canada

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[6] See also Gillen, Gados, (2008).

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USA	Alaska Air	Flights within the United States and from the United States to Mexico, Canada and Alaska
USA	JetBlue Airways	Flights within the USA and from the USA to the Caribbean, Bahamas, Bermuda, Mexico, Colombia, Costa Rica and Peru
USA	Republic Airlines	Flights within the USA and from the USA to Canada and the Bahamas
USA	Southwest Airlines	Flights within the USA and from the USA to Mexico, Costa Rica and the Caribbean. It is considered the country's largest low-cost airline
USA	Spirit Airlines	Flights within the USA and from the USA to various destinations in the Caribbean, Bahamas, Mexico, Central America, Peru and Colombia
USA	Sun Country Airlines	Flights within the United States and from the United States to the Caribbean, Mexico, Costa Rica and Alaska
USA	Virgin America	Flights within the USA and from USA to Mexico
Mexico	Interjet	Flights within Mexico and to USA
Mexico	Viva Aerobus	The cheapest flights in Mexico
Mexico	Volaris	Flights within Mexico and to USA

Source: Adapted from Vowles, 2016

TABLE (G): List of the main low cost airlines in South America

Countries of South America	Airlines	Destinations
Argentine	Sól línea aerea	Flights within Argentine and from Argentine to the others destinations in South America (Comodoro Rivadavia, Merlo, Punta del Este, Rosario, San Luis, Santa Fe, Trelew and Villa Mercedes
Argentine	Aerolinas Argentinas	Flights within Argentine and from Argentine to the others international destinations
Brazil	Azul	Flights within Brazil and also to destinations of USA (Orlando, Ft. Lauderdale)
Brazil	Gol	Flights within Brazil and also to destinations of North and South America
Brazil	Passaredo	Flights to various destinations in Brazil
Brazil	Sete	Flights to various destinations in Brazil (Altamira, Araguaina, Belem, Brasília, Goiania, Imperatriz, Maraba, Monte Dourado, Ourilandia, Palmas, Redenção, São Luis and Teresina
Chile	Sky Airlines	Flights within Chile and also to destinations of South America
Colombia	Avianca Colombia	Flights within Colombia and also to destinations of North and South America and Europe
Colombia	EasyFly	Flights to various destinations in Colombia
Colombia	Viva Colombia	Flights to various destinations in Colombia and also Panama, Lima and Quito
Peru	LC Peru	Flights from Lima to Andahuaylas, Ayacucho, Cajamarca, Huanuco, Huaraz and Tingo Maria
Peru	Peruvian	Flights to various destinations in Peru (Lima, Arequipa, Cusco, Iquitos and Tacna)
Peru	Start Peru	Flights to various destinations in Peru (Lima, Arequipa, Cusco, Iquitos, Talara, Tarapoto, Trujillo, Pucallpa, Juliaca, Puerto Maldonado)

Source: Adapted from INTERNATIONAL CIVIL AVIATION ORGANIZATION (ICAO), 2017

TABLE (H): List of the main low cost airlines in Africa

Countries of Africa	Airlines	Destinations
South Africa	FlySafair	Flights within the cities of Johannesburg, Cape Town and Port Elisabeth
South Africa	Kulula	Flights within various destinations in South Africa
South	Mango	Flights within various destinations in South Africa

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Africa		
Egypt	Air Arabia Egypt	Flights to various destinations in Africa, Middle East and Europe
Kenya	Fly 540	Flights within Kenya and also to South Sudan and Tanzania
Kenya	Jambo Jet	Flights within the cities of Mombasa, Nairobi, Kisumu and Eldoret
Morocco	Air Arabia Marroc	Flights from Morocco to various destinations in Europe
Tanzania	FastJet	Flights from Tanzania to South Africa, Zimbabwe, Zambia and Uganda
Zimbabwe	Fly Africa	Flights between Zimbabwe and South Africa

Source: Adapted from INTERNATIONAL CIVIL AVIATION ORGANIZATION (ICAO), 2017

TABLE (I): List of the main low cost airlines in Oceania

Countries of Oceania	Airlines	Destinations
Australia	Jetstar	Flights within different destinations in Australia and also to international destinations as Cambodia, New Zealand, USA etc..
Australia	Qantas Domestic	The company is not only low cost, since it also offers other options. Flights within Australia and to various international destinations
Australia	REX (Regional Express)	Flights within Australia and also to destinations such as South Africa
Australia	Tiger Airways	Flights to various destinations within and outside Australia.
Australia	Virgin Australia	Flights to various destinations in Australia as well as international flights.

Source: Adapted from INTERNATIONAL CIVIL AVIATION ORGANIZATION (ICAO), 2017

TABLE (L): List of the main low cost airlines in Asia

Countries of Asia	Airlines	Destinations
Cambodia	Cambodia Angkor Air	Flights within Cambodia and to destinations in China, Thailand and Vietnam
China	9Air	Flights between China, India and South Korea
China	Jetstar Hong Kong	It is based in Hong Kong and belongs to the Jetstar group, which is also based in other countries. Flights to Japan, South Korea, Southeast Asia and China
China	Spring Airlines	Flights from Shanghai to over 30 destinations in Asia
Singapore	FlyScoot	Flights from Singapore to various destinations, including Sydney, Hong Kong and Perth
Singapore	Jetstar Asia	It is based in Singapore and belongs to the Jetstar group, which is also based in other countries. Flights to 22 destinations in Southeast Asia
Singapore	Silk Air	Flights from Singapore to various national and international destinations
Singapore	Tiger Airways	Flights from Singapore to various destinations such as Australia, Thailand, India and Vietnam
Korea	Air Asia	Flights within Korea and international destinations
Korea	Air Busan	Flights within Korea (Busan, Gimpo and Jeju) and to Japan, China and Southeast Asia
Korea	Eastar Jet	National flights (Gimpo, Kunsan, Jeju and Chongju) and international flights
Korea	Jeju Air	Flights to destinations within Korea and Japan
Korea	Jin Air	Flights from Seoul to various regional and international destinations
Korea	Sky Wings Air	Flights between Korea, Thailand, and Laos, or Vietnam and Cambodia
Korea	T'wai Air	Flights from Korea to various destinations in Asia
Philippines	Air Asia Zest	Flights from Manila to other cities in the Philippines and also to Shanghai, Busam and Seoul. Tickets are purchased on the Air Asia website
Philippines	Air Phill Express	Flights to various destinations in the Philippines and other countries
Philippines	Cebu Pacific Air	Flights within the Philippines and to various international destinations such as Vietnam, Australia, Cambodia

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Philippines	South East Asian Airlines (Seair)	Flights within the Philippines and to Singapore and Hong Kong
India	Air India Express	Flights to 13 international destinations (Dubai, Sharjah, Abu Dhabi, Al Ain, Muscat, Salalah, Singapore, KualaLumpur, Bahrain, Doha, Kuwait, Columbo and Dhaka)
India	Air India Regional	Flights to 31 international destinations, in addition to domestic flights
India	Go Air	Flights from Mumbai to Delhi, Ahmedabad, Cochin, Goa, Hyderabad, Jaipur, Jammu and Srinagar
India	Indigo Airlines	Flights to more than 20 destinations within India and also international flights like Singapore, Bangkok, Dubai, Muscat and Kathmandu
India	Jet Lite Airlines	Flights to various destinations within India, as well as international flights such as Singapore, Colombo, Kuala Lumpur and Chicago
India	SpiceJet	Flights to 18 destinations within India like Delhi, Varanasi and Goa
Indonesia	Citilink	Flights within Indonesia
Indonesia	Garuda Indonesia	It is not considered 'low cost' but makes many promotions and in this case the fares are very good. Flights to destinations within Indonesia and international
Indonesia	Lion Air	Flights from Jakarta to domestic destinations and also to international destinations such as Saudi Arabia and Singapore
Indonesia	Mandala Tiger Air	Flights to 72 destinations. Operates on four bases: Singapore, Australia, Indonesia and the Philippines
Japão	Amakusa Airlines	It is the smallest company in Japan. It operates in the cities of Osaka, Fukuoka, Kumamoto and Amakusa
Japão	Air Asia	Flights within Japan and to international destinations
Japão	Air Do	Flights to various destinations within Japan
Japão	Cebu Pacific Airlines	Flights from Nagoya to Osaka
Japão	Jeju Air	Flights within Japan (Nagoya, Tokyo, Osaka, Okinawa and Fukuoka) and also to Korea
Japão	Jetstar	It belongs to the Jetstar group, which is also based in other countries. Flights within Japan
Japão	Skinet Asia	Flights from Japan to various destinations in Asia
Japão	Skymark	Flights to various destinations within Japan such as Kobi, Nagasaki and Sapporo
Japão	Star Flyer	Domestic flights between cities in Japan
Japão	Peach Airlines	Flights to 12 destinations in Japan and 7 other international destinations
Laos	Lao Airlines	Flights within Laos and destinations in Cambodia, China, Korea, Singapore, Thailand and Vietnam
Malasia	Air Asia	Flights to various destinations within Malaysia and to other countries (Thailand, China, Sri Lanka, Vietnam etc)
Malasia	Firefly	Flights within Malaysia and destinations in Indonesia, Singapore and Thailand
Malasia	Malindo Air	Flights within Malaysia and destinations in Indonesia, India, Bangladesh, Singapore, Thailand and Nepal
Malasia	MASwings	Flights within Malaysia and still to Brunei and Indonesia
Myanmar	Golden Myanmar Airlines	Flights to various destinations within Myanmar and to Singapore
Sri Lanka	Air Asia	Flights from Capital Colombo to various destinations
Sri Lanka	Mihin Lanka	Flights from Colombo to various destinations, including the island of Seychelles
Thailand	Bangkok Air	Flights within Thailand and to international destinations. Their prices are not really cheap but the company operates in parts that others do not operate
Thailand	Nok Air	Flights from Bangkok and Chiang Mai to various destinations in Thailand and also to Laos, Myanmar and China
Thailand	Orient Thai	Flights between Bangkok and Phuket and also to Hong Kong

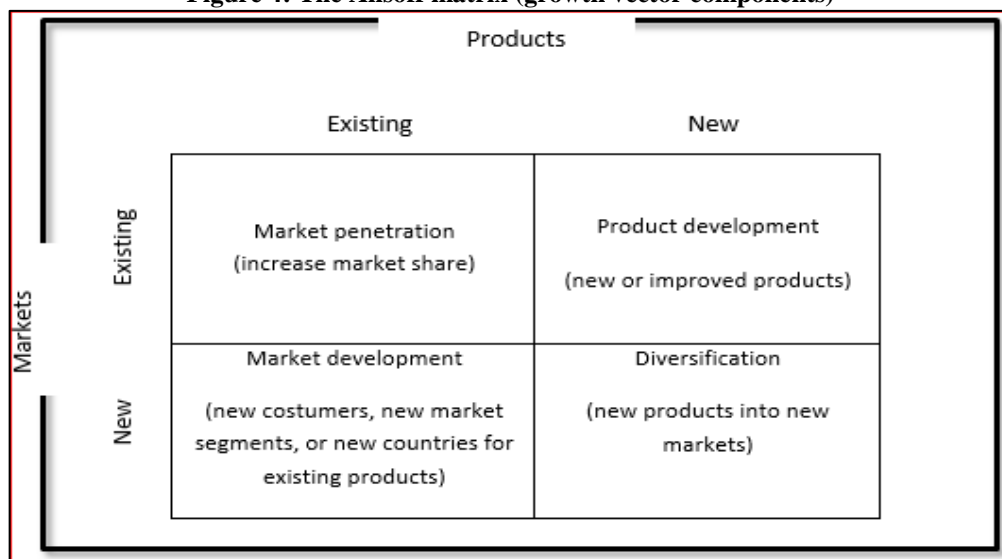| Vietnam	Jetstar Pacific	It is based in Vietnam and belongs to the Jetstar group, which is also based in other countries. Operates national and international destinations
Vietnam	Viet Jet Air	Flights from Vietnam to various destinations in Asia
Vietnam	Vietnam Airlines	Flights within Vietnam and to international destinations, including the United States and Europe
Middle East	Air Arabia	Flights to various destinations in the Middle East and also to various international destinations
Middle East	Fly Dubai	Flights to 26 destinations (Amman, Alexandria, Istanbul, Kuwait, etc)
Middle East	Flynas	Flights within Saudi Arabia and to diverse destinations like Dubai, Antakya-Hatay and Khartoum. Operates in partnership with Etihad, flying to 17 cities in 11 different countries
Middle East	Jazeera Airways	Flights to 19 destinations in 11 different countries

Source: Adapted from INTERNATIONAL CIVIL AVIATION ORGANIZATION (ICAO), 2017

In conclusion, it can be argued that the "LCCs took advantage of the market segment neglected by FSNCs" (GABOR, 2010, p.57), creating new demand streams unexploited or overlooked by the legacy carriers. Also through dynamic innovations in product and service within the airline industry like yield management, ticketless internet bookings and check in. In a dynamic trend, rapidly increasing their market share in relation to the other traditional carriers.

STRATEGIC PLANNING AND DEVELOPMENT IN EUROPEAN TOURISM OPERATIONS AT THE BEGINNING OF THE THIRD MILLENNIUM

In this section we review a number of business development strategies influential in tourism management, starting by considering elements of Ansoff's matrix, a classic model for strategic planning.

**Figure 4: The Ansoff matrix (growth vector components)**

Source: Evans *et al.,* (2003, p.229), adapted from Ansoff, I. (1987)

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The first strategy of development is *market penetration* (increased market share, e.g. Travelodge's expansion via franchising in UK). This model is generally most applicable when growth potential remains good in core market segments, or the company finds itself unable penetrate new markets (EVANS *et al*., 2003). Secondly, *market development* (new clients, sectors or geographies for existing products, e.g. Holidaybreak plc's development from Eurocamp). A key factor in repositioning existing products is the 'transferability' of those products and services to new segments and/or markets. Notably however, as companies enter new markets of which they may have limited knowledge - the risk of costly failures increase (EVANS *et al*., 2003). Thirdly, *product development* (new or improved products for existing markets e.g. Club Med World). The principle intention of product development is, to increase 'market share' among existing consumers and markets of which the company is familiar. A strategic direction most suited to firm's already holding relatively high market share (EVANS *et al*., 2003). However, with the advent of ever decreasing 'product life cycles', product development is arguably of particular importance, representing a critical element in the strategic development of tourism operations. Additionally this method presents other risks, especially considering new products can often fail. Given this almost continuous need for product development a critical trend towards *diversification* (new products or services into new markets, (e.g. First Choice plc) has taken hold (EVANS *et al*., 2003). Diversification consists in two main types. First: *unrelated diversification* entails the entry into new markets and products segments of which the company has little or no previous experience.
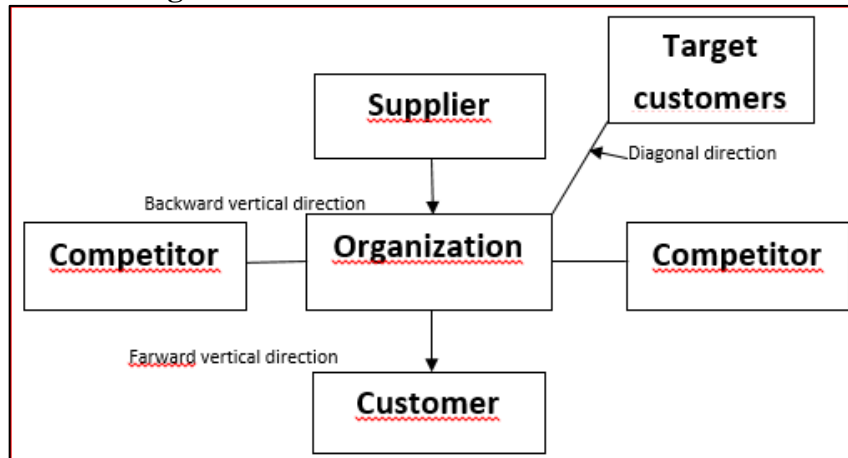
A good example of unrelated diversification in the tourism phenomenon is the case of Tui AG, one of the most important integrated tourism conglomerates. Tui AG group includes the German-based TUI Travel, as well as the UK based Thomson Travel Group, together operating in no less than 15 national European markets. This market leader was originally a Mining, Iron and Steel Company, formed by the Prussia state in 1923, and was called Preussag. Preussag left its core business to concentrate upon tourism related activities (EVANS *et al*., 2003). On the other hand, *related (or concentric) diversification* entails seeking to extend into new segments of markets currently being served. This having the advantage of reducing the risks associated with endeavors in unrelated spheres. In essence, this requires a process of either '*forward* or *backward'* vertical diversification along a company's current supply chain.

Figure 5: Directions and methods of diversification

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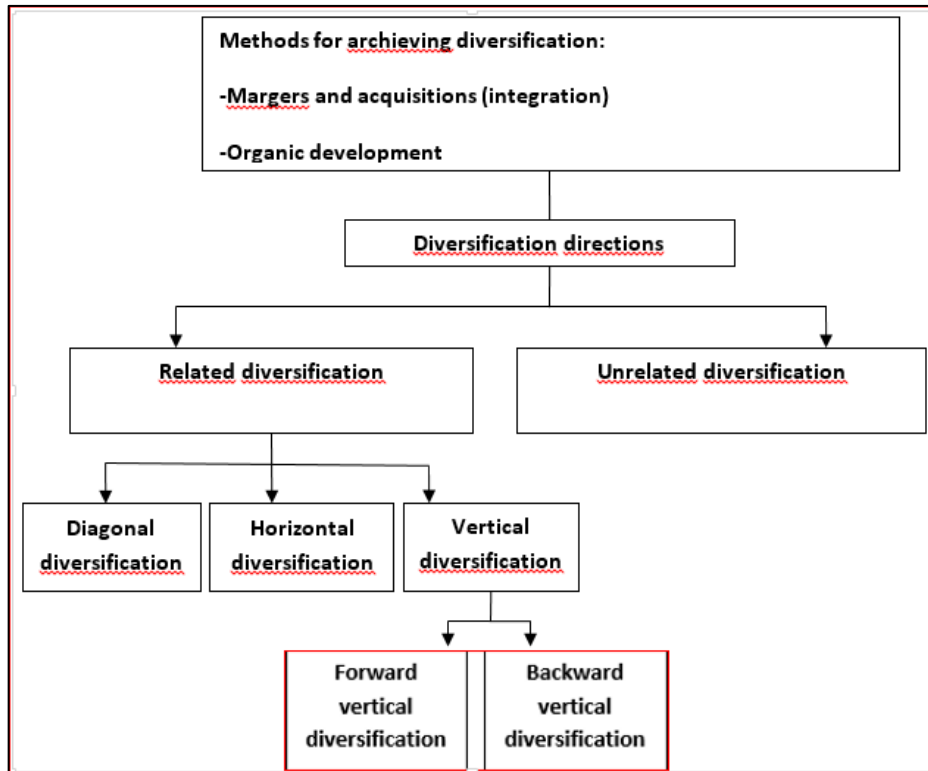
Source: Evans *et al.,* (2003, p.233)

Figure 6: Patterns of related diversification

Source: Evans *et al.,* (2003, p.234)

To gain new customers from companies already serving its own related clients and customers. For example, a tour operator (who has accommodation and an airline fleet), which adds a new distribution network to its current activities (e.g. an internet booking platform and/or a travel agency chain) is extending in a 'backward vertical' direction of its 'value chain' (EVANS *et al*., 2003, p. 223-224). If in contrast, a car hire business is added at the destination, a forward diversification is achieved. A good example of related diversification is the First Choice plc travel organization, encompassing both mainstream and niche tour

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companies, travel agencies as well as aviation subsidiaries. First Choice's successful diversification process has been achieved through both horizontal and vertical pathways. It accentuates the diversification trends in the travel industry in recent years, and has done so, in this case, mostly via the acquisition of related companies (EVANS *et al*., 2003). In contrast, organizations might pursue a process of *'horizontal diversification'*. An example of this would be a strategic airline alliance. Another, a hotel company collaborating with others (e.g. roomkey.com), or by taking over another hotelier in order to gain entry to complementary or competing markets (EVANS *et al*., 2003). Both diversification directions contain there inherent advantages and risks and may be pursued simultaneously by organizations with the requisite management skill and resource base. Nevertheless, the diversification trend is clear, with many market leading tourism companies successfully applying this strategic model in order to grow their businesses. Finally, an important fourth model of related diversification is *diagonal diversification.* This is most widespread in service related commerce, relying upon the use of common "information-utilizing technology" (e.g. credit cards, insurance, currency exchange) in order to improve market intelligence and "target a group of customers with a closely related set of products" (EVANS *et al*., 2003, p.236).

Figure 7: Diagonal diversification map
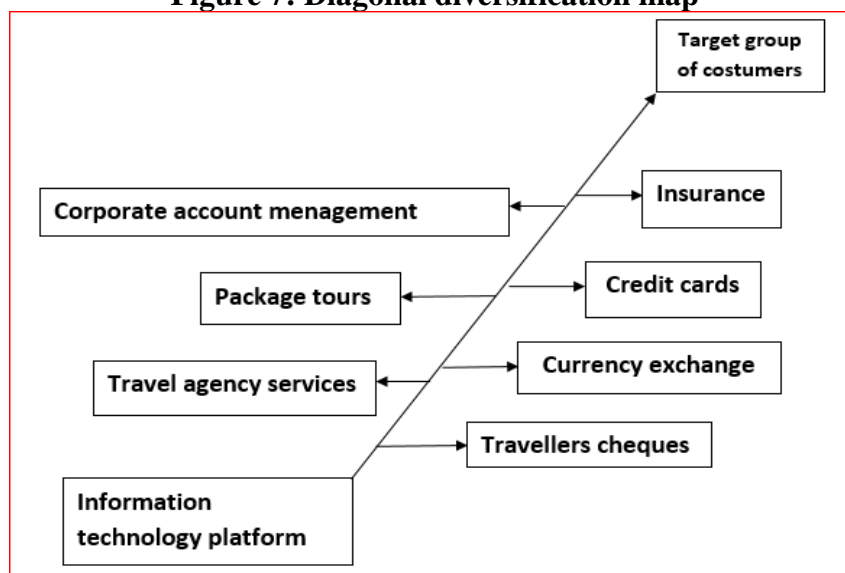
Source: Evans *et al.,* (2003, p.236), adapted from Poon (1993).

The strategic mix of these directions argues Evans *et al.*, will depend in part upon companies 'core competences' (either alone or in conjunction with partner organizations), and their accessible 'resource base', along with the 'levels of risk' organizations are willing to bear in order to grow. At the low end of the risk continuum, reside market penetration

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followed by product development, while at the higher risk end resides structural diversification (EVANS *et al*., 2003), where ironically the greatest potential profits lie.

COLLABORATIVE TRENDS AMONG TOURISM SUPPLIERS

This trend has arguably been driven by a growing realization that achieving competitive advantage, increased profits, and acceptable levels of growth within integrated international markets, can only be achieved through entry into collaborative partnerships and network configurations. Christopher *et al*. suggest that the fruits of globalized 'network competition', will increasingly accrue to organizations best able to "structure, coordinate and manage relationships" with their collaborative network partners (CHRISTOPHER, PAYNE, and BALLANTYNE, 2002 *apud* THEOBALD, 2005, p. 52). A number of important tendencies have emerged in tourism sectors, we might refer to as alternative development strategies. A huge trend has emerged surrounding strategic alliances in the travel industry. Horizontal inter-firm relationships where common strategic objectives are pursued (EVANS *et al.*, 2003). Although the growth trend of strategic interlinking in tourism has flattened out somewhat in recent years, arguably this significant trend is here to stay. In fact, from the 1980s until the early 1990s strategic alliance formation within the global travel industry increased exponentially, creating the basic architectures of today's interlinked tourism business networks. Remarkable, then as now, a majority of the worlds "major airline, hotel and car rental firms were linked by a web of cross-shareholdings, joint ventures, and joint sales and service arrangements" (EVANS *et al*., 2003, p. 252).[7] In the world of hotels and tour operators, alliance behaviors have also been prevalent. The Radisson Hotel Group, for example, has based in part, its international strategy, on "strategic alliances with local hotel groups around the world". Nevertheless, instances of strategic alliances formation among hotel companies are "less common as the preferred strategic method" (EVANS et al., 2003, p. 252). In an illustrative case of 'strategic alliance instability' is that of MyTravel and Carnival Cruises. In April 1996 they acquired 29.5% of rival operator Airtours. The alliance was terminated soon after in 2001. The majority of international strategic alliances are inherently unstable organizational structures, with discouragingly high failure rates (BEAMISH and INKPEN, 1995 *apud* EVANS *et al.,* 2003). Despite the seeming popularity of travel related strategic alliances they are inherently unstable organizations. As it turns out, they are

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[7] See also Dev *et al.* (1996)

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frequently the lone viable mechanism of "market entry", where "regulatory and other barriers to entry effectively block other…entry modes" (e.g. substantial shareholding, full takeover) (EVANS *et al*., 2003, p. 254). Companies chose alliances with some reluctance, but do so in response to powerful market forces in an increasingly globalized world, where economies of scale and scope – rule the day.

MARKETING TRENDS IN BUSINESS AND TOURISM: NEW PERSPECTIVES AND PRACTICES

Marketing 3.0

An important trend driven by the use new wave digital technologies, is impacting both the marketing strategies of suppliers as well as consumers of tourism. This wave consists of three major forces: cheap computers mobile communication devices, as well as, increasing access to low-cost open internet sources/services. Today's consumers are becoming increasingly well informed about competing products in the market, easily comparing rival offerings simultaneously (KOTLER *et al*., 2010). It is a situation where product value and design, is ever more being defined by the savvy consumer, who can choose from a wide range of "functional characteristics and alternatives" (KOTLER *et al*., 2010, p.4). Consumers proposes Kotler *et al*., are no longer best regarded as "passive targets" of marketing promotions, but rather, should be viewed by management and marketing teams, as active participants or at times as 'co-creators' (*sic*) (KOTLER *et al*., 2010). Kotler *et al*., argue that great changes are occurring in the relationships between product/services, suppliers and consumers. The consumer society has been moving from the "one to many" transactions of the *marketing 1.0* era (e.g. early to mid-20th century), to more directed "one to one" relational transactions (e.g. late 20th century) of *marketing 2.0*. Lastly, *marketing 3.0* (globalization and integration) where consumers and suppliers are ever more engaged in "many to many" collaborative interactions (KOTLER *et al*., 2010, p.63).

TABLE (M): Comparison of Marketing 1.0, 2.0 and 3.0

	Marketing 1.0 Product-centric	Marketing 2.0 Consumer-oriented	Marketing 3.0 Values-driven
Objective	Sell products	Satisfy and retain the consumers	Make the world a better place
Enabling forces	Industrial Revolution	Information technology	New wave technology
How companies see	Mass buyers with	Smarter consumer	Whole human with

the market	physical needs	with mind and heart	mind, heart, and spirit
Key marketing concept	Product development	Differentiation	Values
Company marketing guidelines	Product specification	Corporate and product positioning	Corporate mission, vision, and values
Value propositions	Functional	Functional and emotional	Functional, emotional, and spiritual
Interaction with consumers	One-to-many transaction	One-to-one relationship	Many-to-many collaboration

Source: Gabor, (2010, p.54) ; Kotler *et al.,* (2010, p.6)

As new wave technologies increasingly link people from across the globe, streams of news, ideas, and entertainment is both being created, as well as, consume by them (KOTLER *et al.*, 2010), within a "nexus of collaborative, cultural, and spiritual marketing" interactions (KOTLER *et al.*, 2010, p.5).

Social media trends and tourism

New wave technology is critically implicated in the rise of social media, while simultaneously being driven by it. Kotler *et al.,* usefully dissect social media in two broad groupings. Firstly, *expressive* social media (internet blogs and social networking sites like Facebook, Myspace, Twitter; Flickr and YouTube). Secondly, *collaborative* social media (Wikipedia, Rotten Tomatoes etc.). Collaborative users are teaching, learning, sharing their activities, experiences and emotional views; all of which can have important consequences for product development and marketing departments (KOTLER *et al.*, 2010).

The need to monitor and engage the consumer on multiple platforms, arguably, has never been greater. Not least given the fact that some bloggers/users may publish negative commentaries on companies' products and services. Comments that must be countered by company statements, or better, the views of a satisfied or supportive consumer/collaborator (KOTLER *et al.*, 2010). For example, the so called 'viral marketing' trend, where "criticism can spread rapidly around the world (e.g. Twitter), is a case in point. Kotler *at al.,* plausibly suggest, that because of the low-cost and bias-free nature of social media, it will become "the future for marketing communications" (KOTLER *et al.*, 2010, p.9). The influence and budgets of corporate advertising in "shaping buying behavior" consequently diminishing (KOTLER *et al.*, 2010, p.8).

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Prahalad and Krishnan (2008, *apud* KOTLER *et al*., 2010, p.63) argue accordingly, companies must understand that within these new networks, the 3.0 consumers' role is not simply one of promoting brands, but instead can be "extended to selling them."

Consumer trust systems, communitization and co-creation

Moreover, marketing visions are changing in reaction to a shift in 'consumer trust systems', from a "vertical mode to the more horizontal model of today". In these new environments consumers congregate in their own collaborative communities, "co-creating" their "own products and experiences." A sort of emerging 'communitization' process (KOTLER *et al*., 2010), where key community 'characters' lead choice making and value formation (KOTLER *et al*., 2010). Following Seth Godin, Kotler *et al*. argue, that modern consumers do not want to be connected to companies, but rather, "to other consumers" (KOTLER *et al*., 2010, p.33), in *pools, webs,* or *hubs* (FOURNIER and LEE, 2009, *apud* KOTLER *et al.,* 2010), reflecting shared perspectives, tastes and values. Arguably these trends and their effects within the global market will have a decisive effect upon future marketing in tourism and beyond.

CONCLUSION

This paper has sought to discuss and contextualize a number of important trends associated with international tourism operation. In conclusion it may be stated that socio-demographic changes like population growth, greater life expectancy, changes in family structure and increased urbanism will present great opportunities and challenges for international travel operators. Most notable in this mix is perhaps the 'rise of the east'. Clearly, political liberalization has helped to revolutionize international travel, but significantly intense regulation does remain in many areas. Both trends are likely to continue. Our micro analysis of the airline sector has shown, that while low cost airlines have risen fast in the last decades, they have done so at the expense of the larger network carriers. This trend toward international budget airline travel will arguably develop strongly, including in new regions.

In terms of strategic planning and product development, the trend toward diversification and the seeking out of alternative 'asset light' business growth models also looks set to continue. Collaborative options like alliance, franchising and shared acquisitions

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will continue to be prevalent. New wave technological platforms are becoming ever more powerful.

In this redrawing of the marketing environment: collaborative and interactive platforms will become more important for companies seeking to keep existing customers and gain new ones.

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