

Michał Dudek

Wyższa Szkoła Biznesu w Dąbrowie Górniczej

Joanna Hawlena

Uniwersytet Przyrodniczy w Lublinie

## Air tourism in conditions of liberalization, globalization, and ever increasing competition

Issues described in this publication refer to the situation in which operators of air services and tourism are involved in a dynamic process of globalization and increasing intensity of competition. The paper presents the market liberalization process as important for changes in passenger air transport, which in this case acts as a stimulator of development of co-operation with the operators of tourism. The issues associated with both inter-segmental and intra-segmental competition, and the impact of the crisis on the choice of organizational form of vacation are presented. The process of the impact of increment in the supply of air services on competition is discussed for the start-up of a new transport line on the Polish market of air tourism. The pricing strategy during the promotional period, the most popular destinations, and preferences of the customers regarding travel dates are presented as well. The analysis shows that the dynamics of the development of tourism is dependent on the degree of accessibility of air transport services, due to the implementation of cognitive activities and recreation in ever more remote regions of the continent and the world.

### Turystyka lotnicza w warunkach liberalizacji, globalizacji oraz wzrostu intensywności konkurencji

Poruszona w publikacji problematyka dotyczy sytuacji, w której ofercie usług lotniczych i turystycznych uczestniczą w dynamicznie rozwijającym się procesie globalizacji oraz wzrastającej intensywności konkurencji. Zaprezentowano ważny dla zmian zachodzących w pasażerskich przewozach lotniczych proces liberalizacji rynku, który w tym przypadku spełnia funkcję stymulatora rozwoju współpracy z operatorami ruchu turystycznego. Przedstawiono zagadnienia związane zarówno z konkurencją międzysegmentową, jak i wewnątrzsegmentową oraz wpływ kryzysu na wybór formy organizacyjnej urlopów. Omówiono proces oddziaływania wzrostu poziomu podaży usług lotniczych na konkurencję w przypadku rozpoczęcia działalności nowego przewoźnika liniowego na polskim rynku turystyki lotniczej. Przedstawiono strategię cenową w czasie trwania promocji, najbardziej popularne destynacje oraz preferencje klientów dotyczące terminu podróży. Z przeprowadzonych rozważań wynika, że dynamika rozwoju turystyki jest zależna od stopnia dostępności komunikacji lotniczej, ze względu na realizowanie działalności poznawczej i rekreacyjnej w coraz odleglejszych regionach kontynentu i świata.

Keywords: air transport, globalization, liberalization, tourism

Klasyfikacja JEL: L83, L93, F02, 011

## Introduction

Variability of dynamically expanding processes of globalization and the increasing intensity of competition creates an unprecedented competitive pressure for dominance within and between the segments on a scope of influence in all markets of tourism and air transport. The article discusses the importance of the liberalization process for changes in passenger air transport market, which in this case acts as a growth promoter in cooperation with the operators of tourism.

The operators functioning in these conditions on the Polish air transport market must continually seek new solutions to protect themselves against the expansive policies of the more active new foreign airlines. The entry on the Polish market, in February 2013, of a new large and thriving Emirates airline has caused significant re-evaluation of the competitive relations in both the pricing policy and standards of service. The controversial nature of the competitive tactics of the new carrier poses a particular threat to the economic position of PLL LOT, which began to expand into the Asian directions, as well as to the other players on the market. The severity of the nascent conflict of interests is deepened even more by the continuous drop in the global economy, causing volatility in demand as a result of reducing the disposable income of the population, and the increase in the supply of competitive tourist products offered by Asian countries and emerging economies.

Taking into account the overall relations resulting from the current situation on the market, the purpose of this publication is to analyse a wide range of conditions, including the European ones, caused by liberalization, allowing an entry into the Polish market of a new carrier Emirates, and the effects related to it. To enrich the content value and scientific quality, and to enhance the perception of the argument contained in this publication, the methods of descriptive analysis, deduction, comparative and graphic analysis were used, according to the current methodological requirements. The scope of this study serves to verify the hypothesis that liberalization of the market of air passenger transport opens the way to enter into the market for every creative carrier able to offer a competitive supply of services. This is a situation in which competition increases the benefits of the users but also creates a mechanism for the elimination, which could lead to the collapse of economically weaker providers of air services and tourism.

### 1. Activity of low-cost transport operators and economic and touristic development of the regions

The development of a network of connections, new locations of regional and local airports, and the rapid growth of air traffic significantly influenced the multi-

-directional development of the regions. Even smaller areas where airports were created gained great importance in a short time. The inclusion of the region in a network of air services generates substantial benefits for the local government and the population of these areas, and the increasing availability of the values of the local environment is conducive to the development of tourism, which is increasingly becoming the driving force of the economy. As a result of this process, there is a gradual progress of the inclusion of centres located outside the major transport routes in the system of global tourism. Therefore, the expanding scope of cooperation of tour operators and of air transport operators is not surprising. A well-functioning market for air transport services provides a systematic expansion of the field of tourist penetration. Many areas that until recently were only peripheral areas, have increased their accessibility thanks to low-cost airlines operating to and from local airports. This process is facilitated by the ever more intense European integration and liberalization of air transport services for passengers, which substantially reoriented an interdependent system referred to as the “centre – peripheral area”.

The process of liberalization of the global air transport market in conditions of increasing globalization and the ongoing integration processes, despite the fact it places increasing demands on operators, became a stimulus for the freedom of air traffic development. Within this activity, there are significant obstacles arising from the diversity of legal, political, and organizational regulations in the group of the integrating countries. They created major difficulties in the process of accelerated economic growth, which can be seen most clearly in Europe. In order to mitigate these effects, a wider range of activities have been undertaken, regarding the liberalization of the air transport market in the European Union. The introduction in 1997 of several liberalization packages, and the removal of all restrictions on free competition, opened up new prospects for the operators of the European air transport, which result in giving opportunity to any carrier to operate on any route within the EU and to use their own established tariffs, provided the observance of the rules of fair competition [Hawlana, 2012a, pp. 160-162].

Deregulation and liberalization of air transport in the European Community has been officially formulated in the 80s. In contrast to the USA which carried out this process in a single act in 1978, the European community implemented it over a longer period of time and in stages by successive legal acts, of which the most important were the following:

- The first memorandum of the commission of 1979 on Community air transport as an international enterprise, regulated by the provisions of the Chicago Convention, based on the sovereignty of states,
- The second memorandum of March 1984 on the application in air navigation of the competition rules of the Treaty of Rome,

- The first liberalization package in December 1987 with four acts giving base to the liberalization of the air transport market,
- The second liberalization package of July 1990 marked a further significant step towards the development of the process of deregulation and liberalization, and the basis for full liberalization of air transport in the coming years,
- The third liberalization package of July 1992, which was an act ending the regulatory process for Community air regulations, which abolished the divisions between scheduled and non-scheduled air services, establishing uniform rules of competition for those two segments of operations [Myszona, 2000, pp. 8-6].

The effects of these regulations resulted in dynamic growth in the volume of air services in the Community, the source of which was the creation of the single liberal market comprising the European Economic Space. Such an organization of airspace created conditions for free access to the market for new entrants, causing at the same time an increase in the intensity of competition. The results of these changes were significant benefits that occurred on the demand side, mainly due to the reduction in the price and increment of the availability of air services. As a result of the liberalization of the European market, there appeared a particularly strong pro-development impulse in a group of low-cost carriers, which was effectively used by the Irish carrier Ryanair, opening in a short time services to continental Europe. The dynamics of its expansion made that Ryanair carried more passengers in 2010 than Air France – KLM, and as many as Lufthansa (Fig. 1).

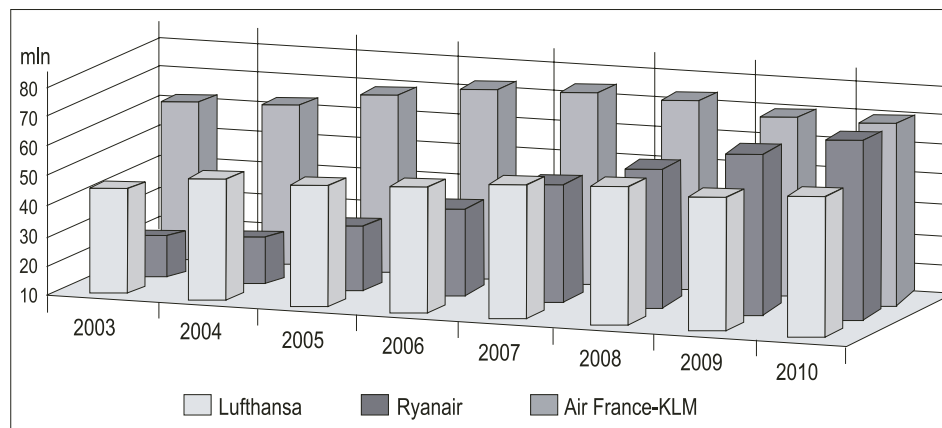


Fig. 1. The number of passengers carried by the most active operators in Europe in the years 2003-2010

Source: [Special Report 2007, p. 50; Special Report 2008, p. 52; Low-cost, 2009, p. 74; Special Report 2010, pp. 51-54; Low-cost 2011, p. 27].

This unprecedented range of market liberalization regulations resulted in a significant increase in demand for a low-cost air services, thanks to which almost all European carriers operating in this segment of services showed a growing dynamics of transport. In addition to increasing the number of passengers carried and expansion of their own route network, they started to take over unprofitable destinations given up by the traditional carriers, and in some cases completely took over some segments of the charter services carriers. As a result of these measures, the number of customers using the services of these airlines has been growing at a faster rate than in other segments and other modes of transport, forcing traditional air carriers to significantly reduce costs and seek new competitive solutions, such as the creation of low-cost subsidiaries. [Hawlana, 2012b, pp. 84-86].

The effects of the process of deregulation and liberalization of passenger air transport have had a significant impact on the establishment of the basic conditions for its development, and they have become the most effective stimulators of shaping the operational business model of low-cost airlines. The necessity of further activation of the process is shown in the fact that a significant part of the subsequent deregulations are included in the bilateral agreements. The latest and most significant achievement in the field of this activity was the open skies agreement between the EU and the USA [Ruciński, 2006, p. 39].

An important determinant of the liberalization process is to establish a single European air transport market, but unlike the USA, in the European Union the effects of liberalization are less clear, since these processes are carried out in several stages. As a result, the strongest players on the market are still the airlines with previously established position.

Reaching with air transport to more remote peripheral regions causes most of them to gradually become agglomerations included in the major European economic, political, and social centres. The development of this process is facilitated by the Schengen system, eliminating internal borders of the Community, which has greatly simplified the development of mass tourism, which increased an interest in the values and culture of other regions, countries, and nations. Undoubtedly, the dynamics of this process were decisively impacted by the facilities enabling the free movement of vehicle transport, but also to a large extent they are the result of increased supply of low-cost air services and the steady expansion of their network connection [Dyr, 2005].

The practical effects of this implemented liberalization process have become an active stimulus to build the tourism market. It was strengthened by regional policy, including the one within the European Union, which aims to improve the coherence between the different regions of the continent. Aligning the differences in the economic potentials increases the intensity of competition, resulting not only in reduction of the prices of transport and tourism, but also improving the quality of the services [Dyr, 2009, pp. 59-61].

It should be noted, however, that use of the opportunities offered by liberalization is possible only under a condition of creative participation in the process. Practice shows that the players who have advantages are the ones who have a high economic and operational potential, and effective instruments enabling competition in deciding the choice of carrier and travel services company. An advantage is gained by entities with a greater degree of decision-making on the opening or closing their markets, and thus dictating the conditions of access and utilization of their strong points associated with the transportation and tourist consumption, including the restrictions, limitations, degree of competition, or promotion with the use of preferential policy in pricing. In such conditions, both the policy of the supply of transport services and tourism is largely dependent on economic factors (market and economic conditions) as well as geographical, technical, and organizational factors [Marciszewska 2001, p. 11]. The preference for such a market of specific services in various regions and countries is, therefore, dependent on many factors, among which a very important role is played by the activity in participating in the international tourism market using the values of the local environment.

## 2. Competition in the supply of air services in the tourism market

### 2.1. Inter-segmental competition

The appearance of low-cost carriers meant that from the beginning of their activities, the suppliers of this segment of services started to compete with traditional carriers, partly taking away their customers by operating on routes which were under their sole management. Especially in the new regions and markets, they efficiently took over an increasing share of passengers by offering cheaper service. Although in the passenger transport it creates a conflict situation, its effects cause benefits to customers, such as reduction of the cost of travel, which promotes the growth of the dynamics of the tourism development. Operators of both segments generally serve different type of customers. Higher-income customers realize their touristic programs with more expensive offers, with high standard services offered by traditional carriers, while lower-income travellers prefer to use the services of low-cost carriers [Tłoczyński, 2006]. It can therefore be assumed that the existing division does not jeopardize the growth of tourism, as each segment of transport favours the development of this traffic by serving a different type of customers.

Tab. 1. Changes in tourism demand. Concept hard &amp; soft tourism

Hard Tourism	Soft Tourism
Group travel	Individual travel
Little time, short-term stays	A lot of time, long-term stays
A dominant model of one main departure during holiday and summer	A model based on two (or more) slightly shorter leisure trips per year
Every element is pre-determined "A to Z", the route, the programme, etc.	Individual and spontaneous programme decisions
Convenience and passivity	Effort and activity
Focusing on the number of trips and "seen" attractions	Focus on quality, impressions, and new experiences
A sense of superiority, a demonstration	Respect and partnership in dealing with service providers and the local population
Lack of preparation and knowledge of attractions, culture, and customs of visited sites	Preparation for meetings with the visited region, country
Imported lifestyle and behavioural patterns	Adopting lifestyle of local inhabitants
Shopping	Gifts
Noise	Peace
Widely accessible souvenirs	Personal mementos (photos, videos)
Lack of knowledge and lack of interest in the language of the country	Learning the local language (at least basic words and phrases)
Fast means of transport, frequent and rapid movement	Lesser importance of the speed and frequency of movement
Intrusive curiosity	Tact
Focus on comfort	Comfort is not necessary
Distance between the staff and the customer	Close and often friendly contact with staff

Source: [Ostrowski, 1983, p. 146].

The dynamic development of tourism extends the scope of varied needs. There is an increasing polarization between customers willing to purchase a comprehensive package of organized tourism and individual travellers, using only certain elements of the offer (e.g. only a flight or hotel services with their own transport) (Tab. 1). There is a consolidated pattern that the package holiday is preferred by consumers with more financial potential, whereas individual tourism is chosen by less well-off, although this is not always the case. Usually, however, income is an important determinant of the demand for each type of service [Panasiuk, 2011, p. 18].

Variability of customer needs and expectations means that in the sector of low-cost transport there is an ongoing process of change, in which the "pure low-cost model of service" is more and more supplemented by elements characteristic for providers operating in other segments. On the other hand, traditional carriers

also benefit from the experience of competitors and make changes in their business strategy, offering customers a lower price of the services at a relatively low level of comfort. This process is driven by inter-segmental competition resulting in development of hybrid companies, combining features of operators of both segments, which are important for forming a new structure of passenger air transport [Ziob, 2008, p. 54].

## 2.2 Inter-segmental competition

Inter-segmental competition is aimed to gain dominance (advantage) over the other operators providing services within the segment. It is an activity in which the competition is continuously building the system of hierarchy in the market, and the process of its transformation. An entry of a new operator results in rapid change in the intensity of this kind of competition, causing problems in the current system of relations. From February 6, 2013, a large and thriving airline from Arab countries, Emirates, has begun regular operations on the Polish market. Inauguration of scheduled flights from Warsaw to Dubai has become a very important event that changed the existing relations between providers of traditional services, resulting in significant revaluation in a competitive situation connected with both the pricing policy as well as with their standards. This is due to the strategy adopted by the new player on the Polish transport market, focused on generating additional demand for both the passenger transport directly on the line Warsaw – Dubai, as well as for transit services, particularly in the routes such as Australia, Thailand, China, Seychelles, Maldives, and Mauritius. A connection network is designed in such a way that the passenger loses as little time as possible in the interchange airport and lands at the destination airport at a convenient time of the day.

It should also be noted that the Emirates airline has set the bar high for the competition, as it gave passengers the disposal of three cabin classes: 12 seats in First Class, 42 seats in Business Class, and 183 seats in Economy Class. This means that the carrier will be the only airline in Poland offering first class flights.

In the promotional period of activity, the carrier assumed that the passenger load factor would exceed 70%, while it would subsequently be reduced to about 65%. This results from the research carried out by the operator, which showed the increasing attractiveness of Dubai, both for tourist exploration, and as a business and financial centre. This is also facilitated by the fact that transit passengers travelling with Emirates do not need a visa to stay for a short time in Dubai. Another factor is the growing attractiveness of Poland for UAE citizens, particularly in tourism-related stays in sanatoria and spa.

The expansion launched by the Emirates is of a controversial character in relation to the route network development plans of the traditional Polish carrier



[Dudek, 2013, p. 1836]. The tactics used by the competitor appears to be particularly dangerous for PLL LOT, which recently decided to offer long-distance flights in the direction of Asia. It is expected that the start of the operations of the Emirates from Warsaw may have a detrimental effect on the financial performance of our national carrier, which is already struggling with huge difficulties caused by grounding of its Dreamliner planes. This situation resulted in a significant impact on the air transport market, as evidenced by the reduction of ticket prices by airlines such as Qatar Airways, Air France, and KLM.

Figure 2 presents the most attractive destinations for customers, among which the leaders were: Bangkok, Singapore, Male (Maldives), Istanbul, and Tokyo. A trip to Bangkok was planned by as many as 17% of tourists using the available promotions, and every tenth passenger has chosen Singapore or Maldives. A little less – 9% – will spend a vacation in Istanbul, and 6% in Tokyo.

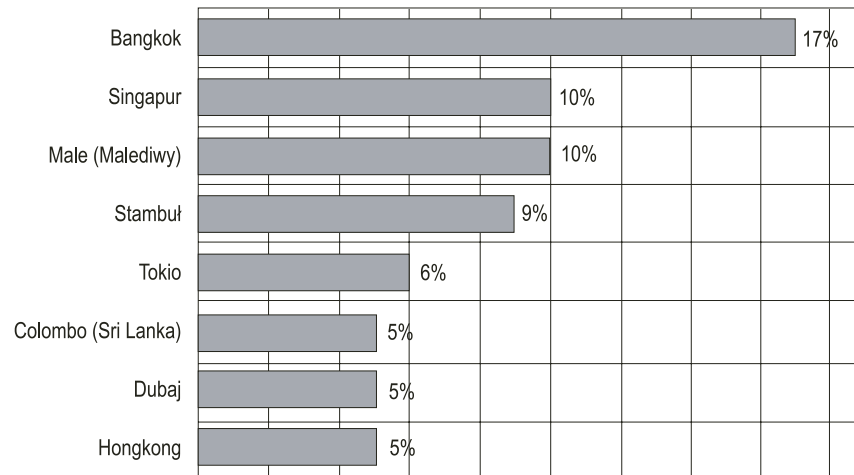


Fig. 2. List of the most popular Asian destination during the time of the welcome promotion of the Emirates airline, shown as a percentage (30.01.2013–05.02.2013)

Source: [Baranowska-Skimina, 2013].

The fierce competitive struggle for the potential passenger is indicated by promotions that emerged almost simultaneously for flights in all directions. In response to the welcome promotion of the Emirates, the Polish carrier had to answer with an attractive offer. In the spring of 2013, between 6–8 March, PLL LOT sold more than quarter of a million tickets for the 45 most popular destinations. Discount on some flights was as big as 50%. Connections within the continent were sold as low as PLN 444 for a return flight. The largest metropolitan cities on other continents, such as Tokyo, Beijing, and New York, could be reached for 1784 PLN.

The promotional fares were, however, subject to certain limitations: the travel had to take place between April and October 2013, without possibility of refund or change of the ticket. The carrier offered also a discount for children: 2-11 years old in the amount of 25%, and for infants up to 2 years – 90%. Moreover, the journey had to last at least three days. The unexpected result of this promotion were lower prices on some destinations even after its completion. In the autumn, a trip to Amsterdam, Barcelona, Kiev, or Copenhagen costs PLN 50–150 less, and a trip to Kiev is almost three times cheaper than in the spring (Tab. 2).

Tab. 2. PLL LOT ticket prices\* (6–8 March 2013)

Date of departure	The price of ticket during the promotion			The price of ticket after promotion			Date of departure
	Destination from Warsaw to:	Destination to Warsaw from:	Return ticket	Destination from Warsaw to:	Destination to Warsaw from:	Return ticket	
Calgary International Airport							
15.03.2013	3256.78	4424.46	7681.24	4344.19	4463.44	8807.63	15.09.2013
15.06.2013	1929.78	2520.46	4441.24	2380.19	2499.44	4879.63	15.11.2013
15.08.2013	4312.78	4424.46	8737.24	4344.19	4463.44	8807.63	15.12.2013
Denver International Airport							
15.03.2013	2984.83	2890.70	5875.53	3005.11	2009.91	5915.02	15.09.2013
15.06.2013	2362.83	2267.70	4630.53	3005.11	2009.91	5915.02	15.11.2013
15.08.2013	3299.83	3205.70	6505.53	3005.11	2009.91	5915.02	15.12.2013
Chicago – O'Hare International Airport							
15.03.2013	2580.39	2201.24	5 066.63	2 599.93	2 504.73	5 104.66	15.09.2013
15.06.2013	1 359.91	1 265.78	2 625.69	2 039.93	2 947.09	4 987.02	15.11.2013
15.08.2013	2 894.91	2 800.78	5 695.69	2 599.93	2 504.73	5 104.66	15.12.2013
New York – John F. Kennedy International Airport							
15.03.2013	2580.39	2486.24	5066.63	2 599.93	2 504.73	5 104.66	15.09.2013
15.06.2013	941.15	846.03	1787.18	2 599.93	2 504.73	5 104.66	15.11.2013
15.08.2013	2884.81	2750.69	5595.50	2 599.93	2 504.73	5 104.66	15.12.2013
Paris – Charles de Gaulle International Airport							
15.03.2013	1006.16	1199.30	2205.46	626.99	691.03	1 318.02	15.09.2013
15.06.2013	239.37	629.85	869.22	626.99	691.03	1 318.02	15.11.2013
15.08.2013	623.69	685.85	1309.54	626.99	691.03	1 318.02	15.12.2013
Beijing Capital International Airport							
15.03.2013	1772.10	1757.13	3529.23	1 989.16	1 975.74	3 964.90	15.09.2013
15.06.2013	1771.59	1756.55	3528.14	1 789.16	1 775.74	3 564.90	15.11.2013
15.08.2013	1921.59	1906.55	3828.14	1 789.16	1 775.74	3 564.90	15.12.2013

Rome – Fiumicino – Leonardo da Vinci International Airport							
15.03.2013	1438.39	1205.35	2643.74	1 207.71	1 246.62	2 454.33	15.09.2013
15.06.2013	551.05	1207.02	1758.02	992.18	1 246.62	2 238.80	15.11.2013
15.08.2013	985.58	405.79	1391.37	992.18	1 030.09	2 022.27	15.12.2013
Vienna International Airport							
15.03.2013	1472.67	1547.59	3020.26	1 478.19	1 554.42	3 032.61	15.09.2013
15.06.2013	185.37	259.21	444.58	1 478.19	1 554.42	3 032.61	15.11.2013
15.08.2013	1473.32	1548.16	3021.48	1 478.19	1 554.42	3 032.61	15.12.2013
Zurich Airport							
15.03.2013	1026.26	1104.43	2130.69	1 028.57	1 110.19	2 138.76	15.09.2013
15.06.2013	183.37	529.89	713.26	1 028.57	1 110.19	2 138.76	15.11.2013
15.08.2013	1026.53	1104.89	2131.42	1 028.57	1 110.19	2 138.76	15.12.2013

\* The price includes taxes and airport charges and fees for the issuance of tickets through the website of the carrier in the amount of PLN 45.

Source: [PLL LOT – *Tanie bilety...*, 2013].

The competitive strategy developed by PLL LOT can be effective not only in relation to large and significant carriers such as Emirates, Qatar Airways, and KLM, but also to carriers from the LCC sector. A return flight to European capitals in the price of PLN 444 is a proposal that is currently offered by such low-cost carriers as Ryanair and Wizz Air. However, the two differ in the level and scope of customer service. LCC offer the simplest transport service, no free meal, and often a charge for luggage and landing on a number of smaller airports further away from city centres. This offer is still welcomed by a large group of passengers for whom it is important to reach the destination at the lowest cost possible. If PLL LOT managed to maintain the level and range of services in the long term, it would be able to establish effective competition also with the operators of this service segment. However, in the long run it does not seem possible, because the carrier is in the process of profound restructuring, and its future is still uncertain.

## Conclusion

The considerations given above show that the compatible development of passenger air transport and tourism, noticeable in the last decade, is increasingly driven by the liberalization of both markets and the globalization of business processes. The passenger air transport market is in the process of progressive liberalization and structural changes, the dynamics of which depends on the interaction of many micro- and macro-economic factors. The entry on the market of a strong and dynamic carrier causes rapid economic and operational changes. The devel-

opment of relations between its participants, resulting from this fact, undergoes a sudden and difficult to predict re-evaluation, creating a new system of interdependence, based on multilateral effects. The most important one is the need to take decisive counteroffensive measures by the other service providers, a significant diversification of the offers, and an active involvement of Poland in the air transport system in Asia and the Middle East.

The liberalization of the market regulatory standards becomes a source of dynamic growth not only in the volume of air services, but also in many sectors of the economy, which depend on this mode of transport. This process activated the effectiveness of mechanisms for lower prices and an expansion of the availability of transport, resulting in an increase in demand in all collaborating segments of economic and social activities. The development of the tourism market in cooperation with the operators of air transport services shows that the scope of the relations generates not only pro-growth dynamics beneficial to the market position of both sectors, but also creates tangible benefits, whose greatest beneficiary is the customer.

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