INTERACTION BETWEEN LOW-COST AIRLINES AND THE DEVELOPMENT OF TOURIST DESTINATIONS

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ABSTRACT

Airlines have made, in terms of time, each destination easily accessible to tourists. Among them, low-cost carriers by differentiating their product and with specific business adjustments have made this form of transport comparatively advantageous in terms of both time and price. The increasing accessibility of tourist destinations results in their development, which is further determined by satisfying the needs of tourists. In order to determine the motives and satisfaction of tourists in the destination and to find out whether the development of the destination is determined by satisfying the needs of users of low-cost airlines, a survey has been conducted among them.

Key Words: low-cost airlines, tourist destination, destination development, motives, Croatia.

INTRODUCTION

Thanks to its favourable geographical position and natural and cultural attractions, Croatia has experienced a relatively early development of tourism. The first known evidence of tourist activities, incomparable with modern forms of tourism, date back to 14th century, when in the Dubrovnik Palace of Sponza a Hospitalium was designed for foreigners who visited the city. A strong development of tourism destinations in Croatia occurs after World War II and its full expansion it experiences in the eighties of the 20th century (Pirjavec, Kesar, 2002; Vukonić, 2005). The position of Croatia in the Mediterranean basin provides it with comparative advantages, even though it was a socialist country at the time, being profiled as an attractive tourist destination. With the beginning of the war in 1991 Croatia suffers from a strong downfall in the number of tourist arrivals. With the end of the war the market recovers, but up to these days has not reached the quantities of pre-war years. According to data from the ITB World Travel Trends Report 2010/2011, Croatia, in the years to come, will register an increase in tourist arrivals. According to the Ministry of Croatian tourism (http://www.mint.hr/UserDocsImages/t-promet-2010.pdf) and Central Bureau of Statistics (www.dzs.hr) in 2010 Croatia registered 10,604,116 tourists with 54,416,379 nights in total, which represents an increase of 3.25 % of arrivals and 2.6% of nights in comparison with 2009. Structural overview shows that the largest number of nights was spent by tourists from Germany, (22,5%), Slovenia (11,5%), Italy (9,3%), Austria (8,7%), Czech Republic (8,2%), Poland (5,7%), the Netherlands (4,4%) and Slovakia (4,1%), which makes the total of 74,4% (hwww.dzs.hr). According to the Tomas permanent survey (Čorak, Marušić; 2011), Croatia is a typical family destination (52% of tourists spend their holidays with the family members) and are extremely loyal customers (73% of at least three times visits). In order to be kept, such positive results of Croatian tourism require differentiation and the improvement of quality elements in the overall market supply. One of these elements is the traffic accessibility. Network connectivity with European tourist-generating centers as well as the quality of transport infrastructure is often a crucial element in choosing destinations.

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AIR TRANSPORT AS A COMPARATIVE ADVANTAGE OF THE DESTINATION

When selecting a tourist destination, prospective visitors take many factors into account, and the proximity of the desired destination together with the quality of the journey have a great impact on their final decision. To make the most of their holiday, it is in their interest to travel shortly, which also includes the types of transport, and their convenience and availability (Duval, 2007.:23; Page, 2005:22). Croatia nowadays gains its comparative advantage in tourist-generating markets with its relative proximity and fairly good road networks. (Pirjavec, Kesar 2002, Horak 2007). Therefore, it was not surprising that in 2010 the tourists mostly came by car (84%) to Croatia, while by plane only 8% of them (Corak, Marusic, 2011:49). However, although the proportion of those who use air travel is relatively low, it increased by 4% in comparison with the results of the Tomas suigirvey in 2001 (Weber et al, 2001).. This is primarily a result of improved control of airline market and the increased number of low-cost airlines offering affordable flights. Low cost airlines are a relatively new phenomenon in the global air traffic, but due to specific adaptations in the business, these companies in a short time have taken a significant position in the global airline market. Differentiation of these compared to traditional airlines is mainly based on affordable fares, which in the last decade has made this type of transport extremely popular and available to general population. (Dobruszkes, 2006, Tretheway, 2004).

Due to the exceptional convenience and speed in relation to other forms of transport, air travel is suitable for tourism in terms of making any destination accessible, Croatia included. Tourists from distant tourist-generating markets, to whom arrival in Croatia by road is rather unaffordable in terms of time and price, largely rely on air transport.

The selection of Zadar airport as a place of research for the purpose of this paper is based on its continuous strong growth in passenger numbers, which according to the Ministry of Sea, Transport and Communications (www.mmpi.hr) in 2010 amounted to 30.56%. This increase is based on the strategic orientation of this airport to low cost carriers, which make most of its traffic, although they only fly seasonally from April to October. Low cost airlines in the Zadar airport started operating in 2002, when Skyeurope introduces flights to Bratislava during the summer period, followed by Intersky that since 2005 has organized flights to Friedrichshafen. Statistical data show a significant airport traffic growth only after 2007, which coincides with the arrival of Germanwings and Ryanair.

The long tradition of tourism in the city of Zadar is primarily caused by its natural and cultural attractions and good transport links. Its popularity and distinctiveness as an attractive European tourist destination is growing systematically, and as a result in 2010 Zadar tourism achieved 971,092 tourist arrivals (6,223,824 nights) as an above-average growth of 8.65% (6.73%) in the Croatian context (Statistical Information, 2011). The total tourist traffic Zadar is dominated by foreign tourists who make up 80% of registered guests, and the largest number of foreign visitors come from the traditional centers of European generating markets, primarily Germany, Slovenia, Austria, the Czech Republic and Italy (Statistical Information, 2011; Analysis of Tourism in 2010, 2011). Tourists from these countries mainly use road transport as a means of reaching the destination (Corak, Marusic, 2011). For this reason, air traffic has not emerged as a key factor in the overall tourist traffic in the city of Zadar, but its contribution is made by connecting the mainland with remote tourist-generating markets (UK, Ireland, Sweden, Norway, Germany- northern part, Slovakia, Czech Republic). These guests occupy an increasing share of the tourist trade thanks to low cost flights. During the last few years an increasing number of tourists has been registered from most of these countries, which to some extent is due to the establishment of low-cost flights. Among them are the United Kingdom and Ireland as the countries that have also achieved the largest increase in arrivals compared to the years before the establishment of low-cost flights

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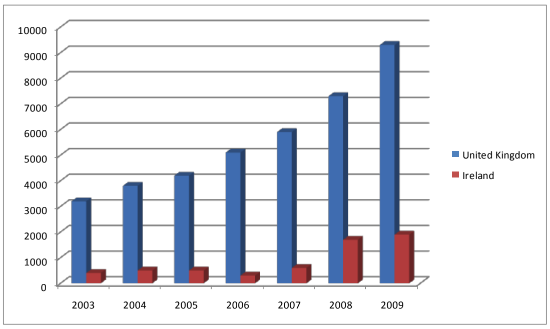
Figure 1
Number of tourists from the United Kingdom and Ireland in Zadar, in the period from 2003 to 2009



Source: Author's analysis of the Zadar Tourist Board internal data

One of the major trends in the European tourism market is shortening the duration of the trip (Vanhove, 2010:85). Referring to a series of recent sources, Sharma (2005:66) illustrates the changes at the global level in the duration of holidays and defines the factors that affect this reduction. Conrady and Buc (2011:9) claim that the market of short-term vacations in Europe is growing up to 9% in 2008 and additionally 1% in 2009, while the market of long-term vacations has decreased to 10%. %. New forms of tourism, such as short-stay city tourism and ''residential/second hometourism'', have ermerged and traffic involving visiting friends and relatives has fed this new type of air service. LCCs have in some cases replaced traditional charter services on many shorter haul forigin–destination pairs (Biegera,Wittmer. 2006:41). With their activities LCC companies have primarily led to a reduction in charter flights, which used to base their existence on tourist travels. Namely, some of the largest charter airlines are owned by tour operators. The development of new business models in air traffic leads to differentiation of business strategies of these companies, which begin to implement the same low cost business model (Cooper, 2008:421). This leads to the implementation of e-business in tour-operators' business systems.

RESEARCH

The research was conducted at the premises of the airport of Zadar in the period from 25 August to 15 September 2010. The object of the research was the characteristics and motivations of tourists who, as a means of transport choose low-cost airlines to reach Zadar. A sample of 256 respondents was exclusively made up of those who use low-cost carriers and who participated in the study immediately before the outbound flight to their home destination. A questionnaire was used as a measuring instrument for the purpose of the research (Zelenika, 1998:367), which, depending on the language preferences of respondents was offered in Croatian, English or German. It consisted of 27 questions, 19 of which were closed, 3 open questions and 5 questions in Likert scale (Marusic, Prebezac, 2004) with a range of 5 degrees. As expected, because of improved traffic links between Zadar and the United Kingdom and Ireland, 67.6% of respondents from that area participated in the research, followed by Belgium (8.2%) and Germany (6.6%). Their nationality was almost identical to tourist-generating markets they were coming from. The collected data were analyzed by descriptive statistics using Microsoft Office Excel and Statistics 10.0 in order to determine the structure of the users of low-cost air carriers and to determine their motives of arrival, the use of services in the destination and their overall satisfaction with the services provided. The results of this study were compared with the results obtained in a continuous survey of the views and tourist spending in Croatia (Čorak. Marusic, 2007/2011), observed as the average scores of tourists who chose Croatia as their destination.

The first element that characterizes tourist travelling nowadays, as much as the use of LCC companies, is the shortness of stay in the destination. According to TOMAS 2010, tourists in Croatia accounted for 9.5 nights in 2010. The tourists who used low-cost carriers on average stayed 4.57 days. Schroeder (2007:162) finds that the length of stay of LCC passengers in a destination amounts to 6.4 days.

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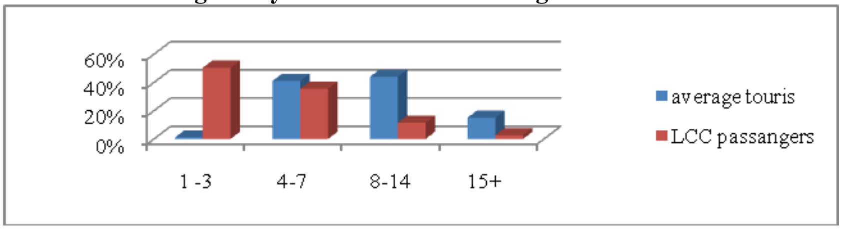
Figure 2
Number of overnight stays of tourists and average users of low cost carriers



Source: author's analysis based on research results and Corak, S. Marusic, Z. (2011)

Shortness of tourist stays in the destination imposes specific demands on the tourist industry. These tourists want (Sharma, 2005; Bowen, Clarke, 2009; Prentice, 2008) individualized and flexible vacation, by which they can satisfy manifold reasons for their travel, and are not necessarily related only to the vacation, but have to be available on the Internet. The availability of all elements of travel on the Internet is one of the most important prerequisites for achieving the advantages of destination for these travelers (Cooper, 2008, Kotler et al, 2006). Unlike traditional guests whose main source of information is primarily the former stay (Corak, Marusic: 2008), the users of low-cost carriers primarily use the Internet as their source of information (50.78%). This is followed by friends and relatives with 39.4%, while the mass media are almost insignificantly represented: brochures (4.3%), newspapers/magazines (1.2%), travel trade fairs (0.8%), radio/television (0%). The respondents mostly found out about Zadar on the Internet sites of low-cost carriers (51.90%), primarily Ryanair's (43.67%). The nature of the tourism product is extremely compatible with Internet advertising (Buhalis, Schertler, 1999:88), therefore the investments in the promotion of Zadar as a tourist destinations proved to be justified. In 2008 the city of Zadar, Zadar Tourist Board, hotels and marinas signed a contract with Zadar Airport, which serves as the basi for the promotion of Zadar on Ryanair's site. In order to promote the route Zadar-London and Zadar- Dublin, the contractors spent a total of € 259,000 and all year round the flights to Zadar were noted on Ryanair's home site. This site is visited by millions every month, and thus covers a much greater potential tourist market than any other medium. The same policy of promotion continued in 2009, in which Ryanair carried 66,503,999 passengers, and each user when booking tickets on the home page was subjected to the promotion of Zadar as an affordable and popular tourist destination. The permanence of promotion brings long-term effects as a new destination becomes recognizable and subconsciously present in the minds of potential tourists (Gretzel, Yuan, Fesenmaier, 2000; Cooper, 2008, Kotler, Bowen, Makens, 2006).

Tourists of different ages (Patterson, 2006, Yeh, 2006) prefer different destinations. The results show that the age of majority of the respondents is 26-45 (59.0%), whereas the least represented age is 0-14 (0%). The group of 15-18 makes 0.8%, those between 46-60 make 9.4%, and 61 and over 2.0%. The TOMAS Summer survey of 2007 gives similar results showing that the dominant age of tourists visiting Croatia is 26-45 (59.9%) and the users of low-cost airlines in this aspect do not deviate from the national average.

The respondents usually had bachelor's degree 47.7%, followed by masters of 23.0%, secondary education had 19.1% of respondents, PhDs constituted 2.3% and primary school education 0.4% of the total sample. On the national level (Corak, Marusic: 2011) in 2010 the most common education degree of the average tourist was secondary school (37.3%), vocational (30%) and higher education (30%). Here, although there are differences, they are probably due to differences in educational systems.

However, the respondents significantly differ from average Croatian tourists (Corak, Marusic. 2011) in view of their travel companions. While an average tourist usually goes on vacation with family members (52.3%) tourists using low cost carriers mostly visit their destination accompanied by friends (47%). These different segments of the travel demand pose different questions to the destination supply (Witt, Moutinho, 1994, Kotler et al, 2006, Such, Kay, 2011).

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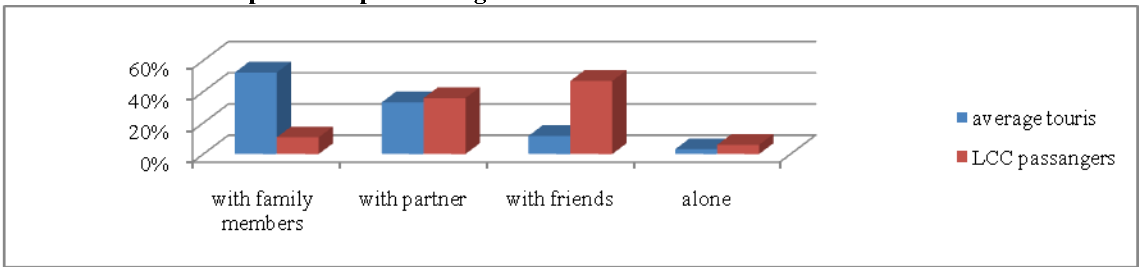
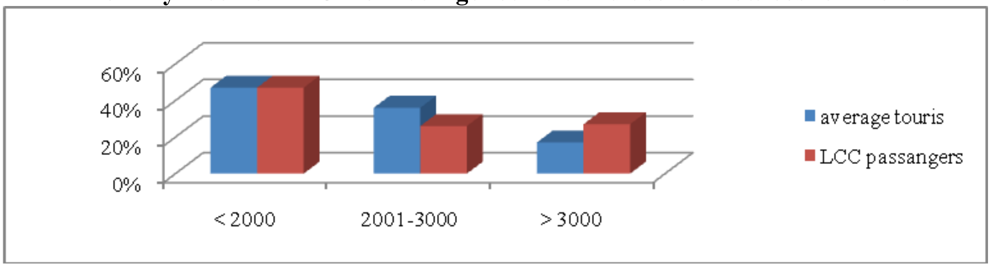
Figure 3
Companionship of average of tourists and users of low cost carries



Source: author's analysis based on research results and Corak, S. Marusic, Z. (2011)

The analysis of average family income for the respondents who chose Croatia for their vacation shows that the respondents have a higher monthly income.

Figure 4
Monthly income in EUR of average tourists and users of low cost carriers



Source: author's analysis based on research results and Corak, S. Marusic, Z. (2011)

One of the fundamental characteristics of tourists in Croatia (Weber, Marusic, 2011) is their loyalty, and 73.3% of guests have visited it at least 3 times. The survey shows that 73.4% of tourists who have chosen a low tariff carriers have been in Croatia for the first time, while for the third time or more only 8.6% of respondents.

Although according to marketing theories (Kotlet, Keller, 2008, Aaker, 2008) the most difficult is the first winning of the customer, now in a competitive and saturated market properly implemented loyalty strategies make the winning difference (McLoughlin, Aaker, 2010. Kotler et al, 2006). Zadar as a destination does not implement the loyalty strategy in its business. The motivation of Ryanair passengers to select a particular destination ranges from visiting friends and relatives (29.8%), tourist attractions (29.4%), business reasons (11%), and low prices (10.4%) and the opportunity to travel to the destination (3.9%) (Gross, Schröder, 2007:160). Schroeder (2007:162) concludes that low tariff companies have opened up the possibility of one day trips to the remote destination for average passengers, whereas earlier it was a privilege for just above average wealthy passengers (Knox, Marston: 2001). The analysis of research results has determined average marks for each of the offered motives, where score 5 meant the strongest motive. The respondents could select more than one motive, because modern tourism is based on multiple travel motivation (Cohen, 1972; Ryan and Glendon, 1998; Cooper, 2008; Kozak, 2002). On the basis of average marks the strongest motives for coming to the destination are leisure, sun and sea (4.37), favorable climate (4.29), natural beauties and preserved environment (3.65) proximity of the destination (3.39), and low transportation costs (3.13). The option *other* (average score 3.87) was chosen by 18% of respondents who were offered the opportunity to specify a different motivation, not listed in the survey, and the largest number of the responses were related to the visit to the musical festival held at the time of the survey. Secondary motives were evaluated in the following order: entertainment (3.08), low cost accommodation (3.00), arts and cultural heritage (2.99), healthy food and famous gastronomy (2.69), sports facilities (1.91), visiting friends and relatives (1.89) and business (1.19).

Furthermore, each of these motivations of the respondents was analyzed through a t-test in order to determine statistically significant relationships between each motif and motifs and travel companions. This variable was chosen because it differs most from the Croatian average.

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Table 1
Average ratings for motives in choosing the destination

Travel companion	Motivation for travel												
	Business trip	Visiting friends and relatives	Vacation with the sun and sea	Vicinity of destination	Low costs of vacation	Low costs of transport	Artistic and cultural facilities	Sports facilities	Natural beauties	Entertainment facilities	Healthy food and known gastronomy	Good weather and climate	Other
alone	1,00	2,20	3,87	2,40	1,93	2,33	1,93	1,47	2,33	1,73	1,73	3,13	0,53
with parents	0,5	3	4,75	3	2,5	3	2,75	2,25	3,5	3,75	2,75	4,75	0
with relatives	0,5	0,5	3,75	2,5	5	2,5	2,25	0,5	2,5	1,5	1,5	2,5	0
with my partner	0,95	1,57	4,24	3,06	2,87	3,18	2,93	1,68	3,54	2,54	2,62	4,24	0,38
with children	0,4	2	4,8	2	2,6	1,8	3	2,2	3,4	2,2	3	3,8	0
with friends	1,09	1,44	4,17	2,93	2,83	2,81	2,73	1,81	3,40	3,15	2,39	4,01	1,09
with partner and children	1,1	1,6	4,5	3,2	3	3,4	3,2	2,2	3,5	3	2,9	4,8	0,5
with partner and friends	0,8	1,7	3,8	2,9	1,7	2,7	1,8	1,3	2	2,4	2,5	2,7	0,7

Average ratings for motives in choosing the destination indicate that the most important motive for Zadar as a destination is leisure, sun and sea, particularly for those traveling with children. Further statistical analysis based on t-test showed a correlation between the different motivation of travel, except in cases when motivation is visiting friends and relatives and sports facilities which are not related (t = 1.1674, df = 510, p = 0.243579). Furthermore, low transportation costs are not statistically in significant correlation with motifs: proximity of the destination (t = 0.0527, df = 510, p = 0.957969), low-cost accommodation (t = 0.9859, df = 510, p = 0 , 324 663), art and culture (t = 1.4280, df = 510, p = 0.153913) and entertainment (t = 1.0071, df = 510, p = 0.314381). This was not unexpected disconnection because by lowering the cost of transportation the distance of the destination becomes less important and a decrease in transport costs can be compensated by the higher cost of accommodation. Furthermore, the motivation inspired by low costs of accommodation is not significantly associated with the proximity of the destination (t =- 0.84340, df = 510, p = 0.410297), art and culture (t = 0.4510, df = 510, p = 0.652209). and with entertainment facilities (t = 0.0581, df = 510, p = 0.953679). As shown, the proximity of destinations as a motive was not statistically associated with low transport costs, low-cost of accommodation, entertainment (t = 0.85131, df = 510, p = 0.394997) and art and culture events (t = 1 , 21 871, df = 510, p = 0.223518).

There was no significant correlation between the travel companions and motives of arrival, except for those that come with a partner, the motives of destination proximity and entertainment (t = 2.15819, df = 238, p = 0.031913), and between those that come with friends motivated by visiting friends and relatives and sports facilities (t = 2.128656, df = 162, p = 0.034795).

The study further determined the degree of use of certain facilities at the destination. Based on the arithmetic mean it was found that most dominantly used are restaurants, cafe bars and beaches, while the least used services are casinos and cinemas, which is almost equal to average Croatian tourists (Corak, Marusic, 2008). This implies that these tourists behave the same way as average Croatian tourists upon arrival at the destination.

59.3% of average Croatian tourists spend on eating-outs, while British tourists during the holiday spend 72% of their average daily expenditure on catering services (Corak, Marusic, 2008). The importance of quality catering services for the destination is evident. As with other average respondents the survey has showed that the respondents most commonly use restaurant services (score 3.88 on a scale of 1 to 5), prepare their own food (score 2.7) and eat in the accommodation unit (score 2.18), while rarely (1.87) use the fast food services.

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Table 2
Activities during the stay in the destination (Likert scale)

Activities	Mean	Standard deviation	Median	Mod
Restaurant	**3,95**	1,26	4	5
Cafe bar	**3,93**	1,28	4	5
Beaches	**3,78**	1,47	4	5
Attractions in the vicinity of Zadra	**3,05**	1,39	3	4
Market	**2,56**	1,32	3	1
National parks	**2,38**	1,48	2	1
Disco	**2,32**	1,69	1	1
Souvenir shop	**2,24**	1,36	2	1
Cultural events	**2,2**	1,32	2	1
Concerts	**2,08**	1,61	1	1
Museums	**1,61**	1,01	1	1
Sports events	**1,33**	0,9	1	1
Casino	**1,23**	0,76	1	1
Cinema	**1,19**	0,61	1	1

CONCLUSION

A quality development of a tourist destination depends on a number of factors which condition its competitiveness in a dynamic and diverse tourist market. One of the basic conditions for effective adaptation of the tourism supply is the insight into attitudes and habits of one’s own tourists, which provides firm basis for a timely reaction to constant changes in the tourist industry. The research has shown that tourists who use low cost airlines more often use Internet services than average tourists. Therefore the presence of tourist destinations on the web site is a prerequisite for good promotional effects among such tourists. As fundamental domains on which marketing communication with tourists should take place are the sites of low-cost airlines. Demographic characteristics did not differentiate the tourists from average tourists, but they are significantly different in terms of travel companions and the duration of stay. These tourists often come to the destination with friends or a partner and remain less than half time in comparison with average tourists. Even these tourists, as well as average ones, primarily come to Zadar motivated by leisure, sun and sea. The survey has proved a significant statistical relationship between the motives of most trips, but it shows no connection between low travel costs, sports facilities, destination proximity, low cost accommodation and cultural events. In addition, there is no significant correlation between the travel companions and travel motives. Finally, there are no significant differences in tourist activities during their stay in the destination between them and average tourists.

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