
Exploratory analysis of the “all-inclusive” system: Implications for economic indices of tourism activity after the Covid-19 economic crisis

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Abstract

The purpose of this article is to study the booking structure, cost and profitability of accommodation companies that implement an AIS (AIS), especially after the economic crisis linked to Covid-19. To this end, the managers of accommodation companies located in one of the largest Tunisian seaside resorts were interviewed and the results were evaluated in a comparative manner with their structure before the AIS.

This research is based on tow parts. The first is an internal analysis of the figures before and after the application of AIS. The second deals with face-to-face interviews with the managers of the various services of hosting companies. The approach of this research is both qualitative and quantitative.

This research attempted to explain the reasons why the all-inclusive system was preferred by accommodation companies in the Hammamet region in Tunisia, especially after the economic crisis linked to Covid-19. The reasons for customer dissatisfaction are linked to the poverty of the system in cultural terms. The general opinion of the leaders was that companies preferred the AIS because of competitive pressure rather than for profitability reasons, especially after the economic crisis linked to Covid-19.

Keywords All-inclusive system (AIS), profitability of accommodation companies, Revenue, Arrangements, Hammamet region.

INTRODUCTION

Since the end of the 1960s, Tunisia has chosen to invest mainly in mid-range seaside accommodation intended for a mass clientele belonging to a European middle class (Chaponnière and Lautier, 2014, Kokas, 2020). Private operators have also focused on this form of tourism to take advantage of the mass effects. The beginning of the 1970s was marked by a development of the coastal areas and their service by the airports of Tunis, Monastir and Djerba.

This facilitated the drainage of the increasingly important flows of tourists to Tunisian beaches. The rise of this type of travel was facilitated by the first charter flights and by the significant flow of consumers. Package travel packages offer a variety of components of a tourist stay: transport, accommodation, catering, excursions, leisure, etc., thus allowing TOs to benefit from significant economies of scale, in air transport and hotels.

In fact, the more the mass of tourists brought in by tour operators, the easier it became to negotiate low fares with local operators. Likewise, the greater the action exerted on pricing, the more competitive the offers were and the greater the customer base (Weigert, 2012). In recent years, the examination of the distribution of world tourist flows has changed a lot. In the West, 60% of the population travels and only 11 to 20% favors the so-called developing countries. Thus, a majority of the profits remain in the issuing countries. The evolution of the package travel model and the advent of “all-inclusive” packages offered in particular by TOs and international hotel chains are also contributing to this currency flight (ATES, 2013, Chesnut, 2020, Grech and al., 2020).

Many cases show that disadvantaged populations still remain the big losers in tourism development (Breton, 2010). Seen in this way, tourism becomes a generator of regression, a source of pollution and a creator of inequalities (Potier and Zegel, 2003). Although most aspects of the AIS in Tunisia have been discussed over the past ten years, there are few studies on its effects on the financial structure (profitability, costs, etc.) of accommodation companies.

This study attempted to explain the reasons why the all-inclusive system was preferred by accommodation companies in the Hammamet region in Tunisia, especially after the economic crisis linked to Covid-19, the general opinions of companies regarding AIS and its effect on the financial structure. To this end, the study used hotels statistics and interview analysis.

The hotel and tourism industry has until now seen itself as a ‘high-touch industry’ because a great deal revolves around personal service in the hospitality industry. Now the crisis requires a change towards the ‘low touch economy’ in this sector as well. We should no longer meet, we should no longer encounter, we should no longer touch each other (Bronkmann, 2020).

We focused on the structure of costs and profitability of hosting companies that implement AIS in Tunisia. The central question of this work is therefore: How can the development of the AIS in a locality influence its growth and the sustainability of its tourist activity after the economic crisis linked to Covid-19? The study is made up of four sections.

The first section briefly reviews previous studies carried out on AIS in Tunisia. The second section presents the methodology and comparative results in terms of profitability and number of overnight stays. The third section covers results of the analysis of the interview conducted with accommodation companies that implement it in Tunisia. Finally, the fourth section examines these results and draws a brief conclusion.

LITERATURE

Reports from international organizations such as UNCTAD, 2013;1 OMT, 2015;and the WTTC, 2015, all confirm that tourism plays a key role in the economic development of countries.In 2013, the total contribution of travel and tourism to employment, including jobs indirectly supported by industry, represented 8.9% of total employment.indeed, a job in tourism would generate 1.5 jobs elsewhere. Global total international tourist arrivals will grow by an average of 3.3% per year in 2030 (UNWTO, 2015).The rate of increase in the Middle East and Africa will be among the highest, growing twice as fast at 4.4% per year as in the advanced economies of the world. Despite this global importance, the tourism sector remains highly vulnerable to all kinds of crises.As for example, epidemics, by natural disasters, terrorist attacks.

Over the past decade, there has been a remarkable increase in the popularity of all-inclusive vacations.indeed, this growth has coincided with the propensity of many destinations to develop tourist enclaves, which can either be purpose-built resorts, physically isolated from their surrounding community, or appear as cruises, which have become a form of particularly popular travel.In this exploratory article, we focus on the effectiveness of marketing all-inclusive vacations.

Historically, AIS was created in England in the 1930s and then at Club Mediterranean in the 1950s. Its greatest development took place in the Caribbean, in the 1970s, integrating accommodation, the image of sun and beach that identifies this geographic area (Rio and al., 2018).

It has also been implemented in different Mediterranean, European and African countries, Europe and North America being the main countries of origin of this type of tourists. These countries are characterized by an average economic income (Ayik and al., 2013).

AIS has also been implemented in recent years in other types of tourism such as cruises (Issa and Jayawardena, 2003) and its marketing associated with a certain type of package tourism.

AIS is an important innovation in the tourist product oriented, fundamentally, towards international markets and is based above all on the minimization of monetary transactions carried out during the holidays.

The AIS includes in general, accommodation, food, beverage, sports activities and many other pleasure activities. When the tourists buy such kind of holiday, they pay for the complete services

included in the package for a predetermined price. This system is based on the inclusion in the final price that the tourist pays, generally in his place of residence, of elements such as accommodation, food, drinks and a series of complementary tourist services (González and Palafox , 2007).

The AIS works especially in destinations where the security of citizens is weak and in places where there is no attractive complementary offer outside the hotel, in particular restaurants and leisure activities (González and Palafox , 2007).

The AIS is the application of a marketing and pricing system in which all services such as breakfast, lunch, dinner, room services, local and imported drinks, sports activities are covered by a fixed price package. This is a very different application from the traditional one in which each service is priced under different packages. Middleton has defined tourism packages, or the business term “inclusive tours” as follows: Standardized, quality controlled and repeatable offerings comprising at least two elements of transportation, accommodation, dining, destination attractions, other facilities and services (such as travel insurance) (Bowen, 2001).

Its principle is to ensure that the traveler pays a single amount called a "package" for all the services to which he should have access during his stay. These services include the price of the plane ticket and insurance, airport taxes, accommodation, food, guides and other transport costs in the host country. In practice, each hotelier or TO has the freedom to define his system, his operating hours, his infrastructures, his activities differently, there is no international standard yet.

The AIS also differ according to the category of the hotel and the destination. The AIS of a five-star hotel is more complete than that of a three-star hotel, which is generally restrictive in terms of paid drinks from a certain time or in discos. The destinations offering more complete all-inclusive are: Mauritius, Cuba, Brazil, the Dominican Republic and Mexico. The AIS, which saw the light of day in the late 90s in the Caribbean Islands, has grown significantly over the past 10 years.

Subsequently, other destinations opted for all-inclusive, such as the Dominican Republic, Cuba and Mexico. Subsequently, the turn came for countries of the Mediterranean basin such as Italy, Spain and Tunisia (Cortés-Jiménez Isabel, 2011). It was with the establishment of club hotels, mainly Club Med and Magic Life, that the AIS experienced these first days in Tunisia. Since then, Tunisian hoteliers have not hesitated to offer their customers this type of accommodation, which has today become an essential system in the Tunisian product. Still some units have gone towards "ultra all inclusive" which means that the hotel is 100% all-inclusive as is the example of the Primasol Miramar Hammamet.

According to Valhouli (2003), the popularity of AIS is based on two fundamental reasons. These are time and value. Tourists don't want to waste time calculating the probable cost of their vacation.

At the same time, tourists expect the services provided by the AIS to meet their expectations. Therefore, the most attractive aspect of AIS is that it is an application where the value of the service to be taken and the money to be spent at the end are clearly specified.

In their study, Wong and Kwong (2004) mentioned the results of a study conducted to define the criteria for tourists from Hong Kong to prefer AIS in their vacation abroad. In this research, 30 different criteria (considered the most vital) were included and offered to the views of 280 tourists. The results indicated that safety and guaranteed departure were the top two most crucial criteria for tourists. The positive and negative aspects of AIS have been discussed in the literature (HakkıCiftçi and all, 2007):

The positive aspects in general are summarized below:

- i- It eliminates unforeseen expenses faced by tourists during their vacations.
- ii- ii- It allows tourists to spend their holidays in a foreign country without being fooled and in complete safety.
- iii- iii- It increases the occupancy rate of accommodation establishments.
- iv- iv- It can have a positive effect on the country's employment level.
- v- v- It helps travel agencies and tour operators to market accommodation establishments with relative ease. The negative aspects are summarized below (Çelebi, 2004):

i- Customers may not have exact information on what is included and what is excluded in the fixed price package in the AIS app. Guests staying in all-inclusive hotels are unlikely to travel to different locations in the city for shopping. Tourists generally tend to spend all of their time in hotels and therefore cannot get enough information about the historical background and social structure of the area.

ii- ii- Tourists, who spend most of their time within the hotel boundaries, are likely to assume that any malfunctions occurring in the hotel could also be encountered throughout the city.

iii- iii- Hotels applying this system are likely to reduce their level of service quality to increase their profitability.

Most of the Turkish tourism sector complains about this system. While tour operators stress the low level of profitability, hotel owners and managers believe they are losing sales and providing free services. On the other hand, employees believe that they work longer but obtain lower wages, while traders in the region complain that they sell few products because of the application of the AIS.

As for tourists, they complain of waiting long hours for service and obtaining inferior quality of services (Çelebi, 2004). Another observation from AIS concerns profitability, costs and waste. In their studies carried out in Antalya, Üngüren et al (2009) claim that AIS increases occupancy rates in hosting companies. Demir et al (2001) also claim that AIS increases the occupancy rate. In addition, in another study conducted in Antalya, Demir (2004) argues that AIS increases business income.

In the study carried out in Marmara by Menekşe (2005), the affirmation is that among the existing types of accommodation, the most suitable and the most profitable for companies is half-board or bed & breakfast. Industry representatives also indicate that the half-board option is more useful than AIS for businesses in Marmaris (Kirt, 2010).

This research attempted to explain the reasons why the all-inclusive system was preferred by accommodation companies in the Hammamet region in Tunisia, especially after the economic crisis linked to Covid-19

METHODOLOGY

Market studies have shown that AIS attracts more families with children but also a clientele with average incomes. This category represents the main mass of consumers in seaside destinations. Tunisia presents good value for money at the level of the AIS, thus satisfying a medium-wealthy and undemanding clientele.

This system is very widespread in certain source markets and more particularly the German market. To study the booking structure, cost and profitability of accommodation companies that implement AIS, we conducted interviews with the managers of accommodation companies located in one of the largest resort's Tunisian women.

These were interviewed after installing AIS and the results were compared to their pre-AIS structure. The comparison criteria are income, charges and overnight stays as well as gross operating income, headcount and average revenue per room.

This research is based on two parts. The first is an internal analysis of the figures before and after the application of AIS. The second deals with face-to-face interviews with the managers of the various services of hosting companies.

First study

The first analysis is internal in nature and concerns a case study of a 5 stars hotel in Tunisia, which concerns a performance analysis according to the different arrangements.

Tables 1, 2 and 3 give an idea of the effectiveness of the application of AIS. Two reference years were considered, without AIS and with AIS:

1: Results of the comparative analysis in terms of income:

2: Results of the comparative analysis in terms of overnight stays:

3: Comparative results in terms of gross operating income - staff and average revenue per room:

Table 1: Comparative analysis in terms of income:

BEFORE AIS			AFTER AIS			DIFFERENCE
	Total	%		Total	%	
Revenue	9 822 851	100%	Revenue	7 706 744	100%	-12%

Arrangement	7 541 531	77%	Arrangement	6 776 542	87%	
Half Board	6 349 374	84%	DP	2 992 307	41%	10%
Full board	91 387	1%	PC	7270	11%	40%
Bed and breakfast	1 100 769	15%	LPD	1 399	2%	10%
AIS	0	0	AIS	3 775 566	51%	-13%
Extra	2 281 320	23%	Extra	930 201	13% _s	51%
						-10%

Table 2: Comparative analysis in terms of overnight stays:

Overnight stays	58 591	100%	Overnight stays	60 464	100%	
Half Board	49 329	84%	Half Board	26 699	44%	-40%
Full board	710	1%	Full board	932	2%	1%
Bed and breakfast	8 552	15%	Bed and breakfast	4 842	8%	-7%
AIS	0	0	AIS	27 991	46%	46%

Table 3: comparative analysis in terms of gross operating income - headcount and average revenue per room:

BEFORE AIS			AFTER AIS			DIFFERENCE
Gross operating income (GOI)	4661329	47,45%	GOI	2052012	29,58%	-18%
Number of employees	139,25		Number of employees	121,15		-18%
Revenue per available room (RevPAR)	96,47		Revenue per available room (RevPAR)	112,08		16%

Discussion

According to Table 1, the switch to AIS generated:

- a drop in overall income of 12%.
- an increase in arrangement income of 10%.
- a 10% drop in extra food and drink income.
- a remarkable decrease in income with half board of 40%.
- We can notice that the costs are almost the same with the AIS or without the AIS since the charges only increased by 5%.
 - Really AIS is worth a cost almost similar to that of a full board.
 - It is important to also take into account the increase:
 - Purchase prices (fruits & vegetables, alcoholic beverages: consumption rights for alcoholic beverages increased by 40%)
 - Electricity, gas and water charges ...

Table 2 provides a comparison in terms of overnight stays, it follows:

- A slight increase in the number of overnight stays of 2%.
- a 40% drop in Half Board.

It can be argued that the hotel has been able to acquire new price-sensitive clientele (new markets) who prefer AIS while retaining their loyal and returning customers.

The three-fold comparison offers the following findings:

- The Gross Operating Income decreased by 18% (due to the increase in purchase prices for products and items of food and drink).
- The number of employees has decreased by 18%, (AIS does not require a large number of personnel due to the large application of self-service).
- Average Revenue per Room increased by 16%, (the high selling price is aligned with the competition not with internal hotel factors such as charges).

The summary of the previous results is summarized in the following points:

- The system allows for a higher turnover (an All in stay is the most expensive).
- The hotel has a larger profit margin for food (an essential component in the system).
- It also ensures an atmosphere and dynamic within the hotel, customers no longer need to go out to lunch or drink elsewhere.

Second study

This second study focuses on interviews with the managers of the hotel. The study was carried out through face-to-face interviews both with the managers of the various services of the hosting companies. The survey form used in this study was prepared by literature review to find out the effects of AIS on the financial structures of these companies.

The study brought out some characteristic elements of AIS. After analysis of interviews with tourism professionals, these elements can be grouped into 8 categories, customer adjustment, income and occupation solution, quality of service, application of all in and perception problem, loss of customers, impacts on staff, impact on the local population, problem of external attraction (see the table 4).

Table 4: Grouped themes

Themes	Registration units
Customer adjustment	<i>AIS is highly demanded by TOs because their clients are looking for this type of arrangement.</i>
	<i>I think that if this formula is so widespread, it is proof that it is a AIS that works.</i>
	<i>Several TO opt for all-inclusive, which attracts a clientele different from the classic clientele by a higher level of purchasing power.</i>
Income and occupation solution	<i>"I have had the opportunity to manage Hotels offering mixed packages: Half Board, Full board, Bed and breakfast and AIS</i>
	<i>The AIS are the ones that generate more than 75% of our income.</i>
	<i>"It is a safer occupancy guarantee than for conventional systems"</i>
Quality of service	<i>"The quality of service must be ensured by the hotelier regardless</i>

	<p><i>of the formula he sells. I can cite many hotels that sell DP where the service is poor. I can also tell you of many hotels that sell a flawless All In.</i></p> <p><i>Everything has a price. I prefer a hotelier who sells All In at 100 DT than DP at 50 DT! For me All In is not synonymous with low end. "</i></p>
Application of all in and perception problem	<p><i>Well understood, the formula is therefore far from being condemned. We moved away from its original spirit and we reworked it awfully. This is to exclude "noble" products and sell the illusion of consuming at will, while consumption relates to inexpensive products.</i></p> <p><i>By acting on the quality of the food and excluding alcoholic beverages from the standard consumption except beer, we divert the all-inclusive formula which originally meant the right for the customer to consume at will what he wishes to consume, including major brand alcoholic beverages.</i></p> <p><i>The followers of this formula imagine that when they pay for everything, they will have everything.</i></p>
Loss of customers	<p><i>"This is a product that completely breaks with the classic hotel industry because it completely excludes the notion of individualized service.</i></p> <p><i>"It is a practice which rather generates a loss of high-end customers, and therefore a drop in the quality of service offered in hotels"</i></p>
Impacts on staff	<p><i>AIS does not motivate the staff very much.</i></p> <p><i>The absence of tips is the real cause</i></p> <p><i>hoteliers saw in the AIS the possibility of making a profit by reducing the staff assigned to customer service, thanks to self-service</i></p> <p><i>AIS does not motivate the staff very much.</i></p>
Impact on the local population	<p><i>"All in packages are getting cheaper and cheaper (the price war between tourist operators even goes so far as to offer free flights and considerable reductions in hotels, ...).</i></p> <p><i>The prices do not take into account the repercussions on the environment, health, the quality of life of local populations, ... or even the environmental costs at the global level.</i></p>

	<i>Working conditions (including children) are increasingly precarious in the tourism industry.</i>
	<i>By having everything at a reduced price in hotels, tourists won't want to go out. As a result, exposure to the arts and culture of the country will be very limited.</i>
	<i>On the ground, we saw taxists, shops, restaurants, cafes in difficulty just after the introduction of all inclusive. Even the activity of the bazaarists, the artisans of the excursions has drastically diminished.</i>
	<i>Talking about a success of the current tourist season is a way to deceive public opinion.</i>
	<i>The large number of tourists is not an indicator of economic success, especially with the advent of an "All in" system which has reduced the number of workers in the tourism sector, as well as the decline in foreign exchange income from the tourism sector by 6.9%.</i>
	<i>This decline is due to the fall of the Tunisian dinar to its lowest level ever.</i>
	<i>"All in packages are getting cheaper and cheaper (the price war between tourist operators even goes so far as to offer free flights and considerable reductions in hotels, ...).</i>
Problem of external attraction	<i>It is true that the majority of guests rarely leave their places of stay, not just because of the all-inclusive package, but also because of a lack of attraction, lack of innovation and harassment.</i>
	<i>Today nothing is hiding. Tourists express themselves on the net and warn future consumers of potential risks at all levels.</i>
	<i>Our old market, tourist restaurants and entertainment must be the subject of a strategic development plan in order to create changes that will attract more tourists.</i>

The most important factor affecting quality is the lack of motivation of employees due to the absence of tips. Although AIS is not synonymous with deterioration of quality, its distancing from its original spirit and the difficulty of instituting regular control can impair quality in a second degree.

The general opinions of clients on AIS are given. A very striking opinion emerges: this system is poor in cultural terms. In fact, the negative effects of AIS on local traders are numerous.

Customers stay in the hotel during the day so that it reduces shopkeepers' chances to sell. Since the incomes of the big businesses decrease, small businesses face the risk of extinction. The decreases in shopkeepers' income make negative effect on the regional economy. Also, if all businesses adapt AIS, the number of the employees they employ falls.

In the other hand, the managers go through hard times in meeting the fixed costs as their sales drop down.

Customers also express a second set of system limitations related to the quality of the low-end products presented (scam), the impropriety of the restrictions related to the schedules imposed on customers and the discrimination of customers who do not belong to the system.

Researchers have argued that although it seems possible to apply tourism indifferently in all countries, this can lead to negative results if work is not carried out on its effects.

When a general review is made on the pricing of the all-inclusive system, tourism academics criticize that demand in Tunisia is made by low-income tourists as it is a cheaper type of pension compared to other types of pensions. Therefore, the quality of the service decreases.

As price is one of the indicators of quality, it can be revealed that the all-inclusive system used in Tunisia struggles to create the image of a country offering quality products and to attract the attention of tourists. able to pay the most expensive tariff. In view of this percept, it is necessary that precautions be taken to remove this system from the perception of "cheap vacations".

Discussion and conclusions

This study attempted to explain the reasons why the all-inclusive system was preferred by accommodation companies in the Hammamet region in Tunisia, especially after the economic crisis linked to Covid-19, the general opinions of companies regarding AIS and its effect on the financial structure. To this end, the study used descriptive statistics and interview analysis.

When the reasons why AIS is preferred by hosting companies were examined, customer demand in the market and the possibility of creating new customer base was seen as the most important. This was followed by the possibility of creating a new clientele; the occupancy rate being maximized by AIS.

These results correspond broadly to the results of studies by Çizel (2008), and Üngüren et al (2009) The lack of motivation of the employees followed by the distance from his original spirit and the difficulty of establishing a regular control at AIS influenced the degree of customer satisfaction. In addition, the results of the study showed that the opinions of customers to AIS are not primarily linked to the quality of the services presented.

External factors were cited as the poverty of the system in cultural terms. Customers also express a second set of system limitations related to the quality of the low-end products presented (scam), the impropriety of the restrictions related to the schedules imposed on customers and the discrimination of customers who do not belong to the system.

The all-inclusive system has been one of the most controversial issues in the tourism industry in Tunisia, particularly in Hammamet. The results of our study show that the hosting companies that implemented AIS in Hammamet maintained their profitability through demand, despite the costs and waste. However, these companies will have to face some shortcomings related to:

- Transparency of information: the implementation of measures with travel agencies to clarify the system and the price which at first glance seems relatively high or even excessive.
 - The homogenization of customers: explore the possibility of not displaying the all-inclusive system with other arrangements, to avoid the feeling of discriminatory holidays.
 - Strengthening customers' sense of responsibility: increasing the number of operators who encourage the development of local economies, cultural exchanges, and limit damage to the environment.
 - The enhancement of heritage: integrate visits to the infrastructures of archaeological sites, and create new circuits (wine route, olive oil route, etc.) alongside activities and events (leisure parks, international sports competitions , concerts ...).
 - Improving management control: establishing specifications which must be drawn up by experts in Hotel management and which will consider three key elements: quality, clarity and cultural authenticity.
 - Give meaning to the stars: offer more reliable landmarks to national and international customers and allow Tunisia to be more competitive on the international scene.
 - Limiting all-inclusive to a few establishments that can provide it correctly: Establish a Benchmark with competing countries that have successfully completed this system, such as Turkey and Spain.
- Also, It is clear that the first action to be taken urgently is to demonstrate by means of a sound communication plan that Tunisia is still a tourist destination par excellence. Communication is an imperative in rebuilding the image of a destination in crisis following the COVID-19 epidemic. The required communication campaign must have two characteristics:

-First, to be effective, it must go through high-level media, credibility;

-Second, the timing must be quick, whereas the need to use mass media to change tourist attitudes.

It is strongly recommended that marketing strategists seek the most transparent means of communication possible with clear objectives, in order to regain the trust of the media, tour operators and tourists.

When the reasons why AIS is preferred by hosting companies were examined, customer demand in the market and the possibility of creating new customer base was the most important. This was followed by the possibility of creating a new clientele; the occupancy rate being maximized by AIS. Stability and security are both a for a harmonious tourist industry. Today, after the COVID-19 epidemic, Tunisian tourism has a big job to do if it is to emerge from the impasse.

A well researched and well targeted marketing communications plan must be an absolute priority. Then, a viable strategy focused on the valorisation of the customer offer and on customer satisfaction becomes equally essential.

The form proposed will allow the new Tunisia to forge its new identity and create a new destination brand.

There is an opportunity to study the impact of COVID-19 in the Arab world and compare the effects between countries directly affected and those less affected. Another potentially interesting line of research would be to study the available means capable of giving a positive image to countries at the heart of the COVID-19 epidemic.

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